CYMS TRAINING GUIDE

CTG-A01 – HOUSEHOLD – PASS - CLASS

Updated Apr 04

OVERVIEW:

When a new family comes to CYS, the Central Registration office must gather extensive information about the family, enter it into CYMS, and process a registration fee before the child can start using any CYS services. (Note: We recommend a desk-side interview where the clerk puts the information straight into CYMS rather than having the parent manually complete forms).

This "registration process" consists of 4-5 key steps in CYMS. This training guide provides detailed information about that process:

STEP 1 – Gathering HOUSEHOLD INFORMATION (information about the "family" – the sponsor, the spouse, financial information and emergency contact information).

STEP 2 – Gathering CHILD INFORMATION (core information, special needs/health, medical, allergy, shots, illness)

STEP 3 – Issuing a PASS (collecting the annual registration fee and giving the child "permission" to start using CYS programs such as hourly care, full day care, MST programs, youth sports, FCC, etc.) .

STEP 4 – ENROLLING the child in a class (if one is available or desired)

STEP 5 – VALIDATING whether what you did was correct (some reports and inquiries to check the data you put into the computer).

SPECIAL NOTE: There are TWO versions of this guide:

1. CTG-A01a HH-PASS-CLASS. This version is intended for existing ongoing operations. It assumes your database has already been built and you are already using CYMS on a regular basis. It provides guidance on entering families one at a time as they arrive at your installation.

This version of the guide should also be used as a TRAINING TOOL when orienting new employees. It is an excellent practical exercise for teaching basic CYMS navigation and processes in a very non-threatening environment. Match the new employee up with a current CYMS user, go into demo and have them enter a fake household. The first time through, the "instructor" should use the guide as a manual provide guidance and explanation to the student as they go. The student should focus100% on the computer and the screen. The goal is to get the student familiar with moving around in CYMS.

The second time through (entering a second family), the "instructor" should give the guide to the student and let them read and process the steps. The instructor should be available to answer any questions or correct any mistakes.

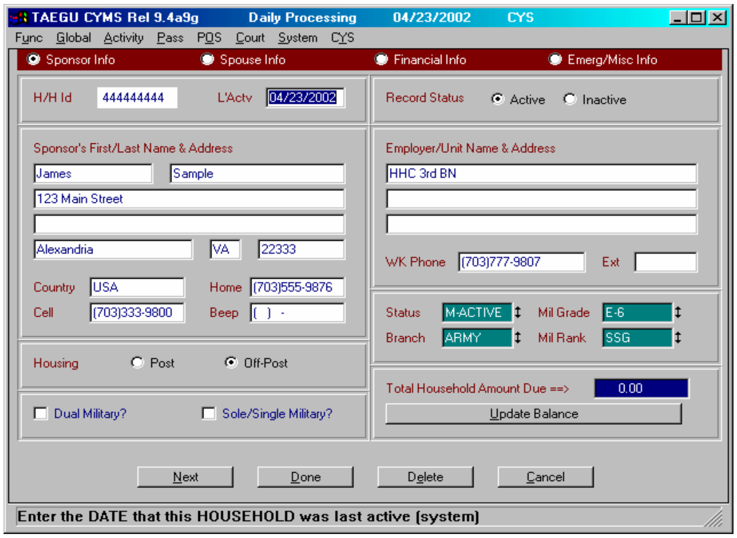
2. CTG-A01b HH-PASS-CLASS "GO LIVE". This version ("GO LIVE") is ONLY to be used by installations being initially fielded with CYMS. It gives special instruction on putting "all" of your households into the database for the first time. This bulk data entry process must be done before an installation can "go live" and start using CYMS.

STEP 1 - HOUSEHOLD INFORMATION

1. GETTING THERE:

a. Click Global Sales hot button
b. Click New Household button
c. Enter Sponsor SSN (no hyphens) as HH #
d. Hit Add button to go to the 4 Household (HH) screens

2. SPONSOR INFO SCREEN:



a. Enter sponsor first and last name (use upper and lower case for all entries in CYMS)

b. Enter address, city, zip, phones. (If city is different than the default, overwrite it)

c. Housing – mark whether family lives on or off post

d. Dual/Sole Military – click ONLY if this family needs a Family Care Plan (if a civilian family needs a Family Care Plan also click here)

e. Enter work or unit address, city, zip, phones (if applicable)

f. Status
   1) Right click in the green field to bring up a pick list.
   2) Double click correct entry. This is critical annual report data.
   3) Careful with civilian choices: which apply to sponsor/spouse; note difference between DOD Employee, non DOD-Fed, spouse=employed other than DOD/Fed, sponsor=private

g. Grade/Branch/Rank – if sponsor is military: (if Civilian, leave all 3 fields blank)
   1) Move across and right click in the green Mil Grade field.
   2) Double click the correct entry from Army, Marines, Navy, USAF or USCG section of the list. All three fields will fill in.
   3) Hint: you can narrow down the list by typing in the first few letters of the branch of service!

h. BE CAREFUL HERE ➔ Click Next button to go to the Spouse Screen.
   DO NOT CLICK THE DONE BUTTON.

OOPS!!! If you made a mistake and hit the DONE button instead of the NEXT, you can't get back into the HH part of the file from here. You will have to leave Global Sales (hit the ESC key twice) and go to the HH and Family Member Update hot button. Find your family, finish adding the spouse, financial and emergency information below – and then go back into Global Sales to pick up the instructions below for FAMILY MEMBER INFORMATION.

3. SPOUSE INFO SCREEN:

a. **If there is <u>no spouse</u> leave this screen exactly as it is. The default information (last name, address) should stay there – don't touch anything!**

b. **If there is a spouse, enter spouse's <u>first name</u>. (If last name is different than the default, overwrite it)**

c. **If <u>address</u> is different than the default, overwrite it. Enter <u>phones</u>.**

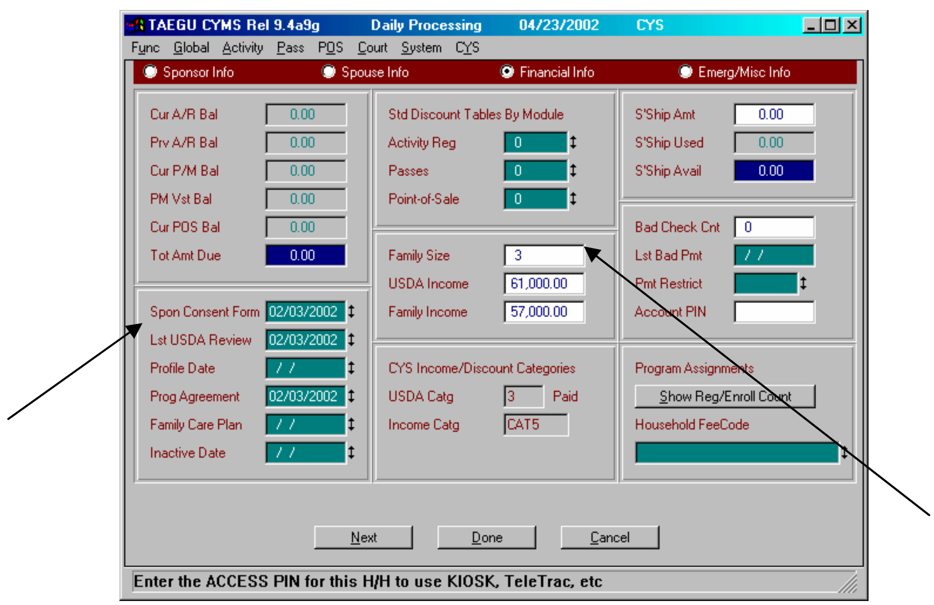
d. **Enter <u>work or unit address</u>, <u>city</u>, <u>zip</u>, <u>phones</u> (if applicable)**

e. **<u>Status</u> -- follow rules in #1f above. (Critical annual report information!)**

f. **If spouse is military, follow <u>Mil Grade</u> rules in #1g above. If Civilian, leave Branch/Grade/Rank blank.**

g. **Click Next button to go to Financial Screen**

4. FINANCIAL INFO SCREEN: **(Note: only 2 of the 8 boxed areas are used at this time)**



a. **Go to the <u>bottom left</u> boxed area.   Enter any applicable <u>admin dates</u>. (Hints: use tab to move from date field to date field; if you make a mistake on a date, clear it using the F8 key at the top of your keyboard)**
   1) **Sponsor Consent Form (usually the registration date)**
   2) **Last USDA Review (usually date of last USDA form submitted to State)**
   3) **~~Profile Date~~ (ignore this field)**
   4) **Program Agreement (this field tells the computer when to start the clock running on the due date for the sponsor to bring in the Family Care Plan, if one is required)**
   5) **Family Care Plan (usually date on FCP)**
   6) **Inactive Date (used later when family becomes inactive – you do not want to enter any inactive families during this initial data input)**

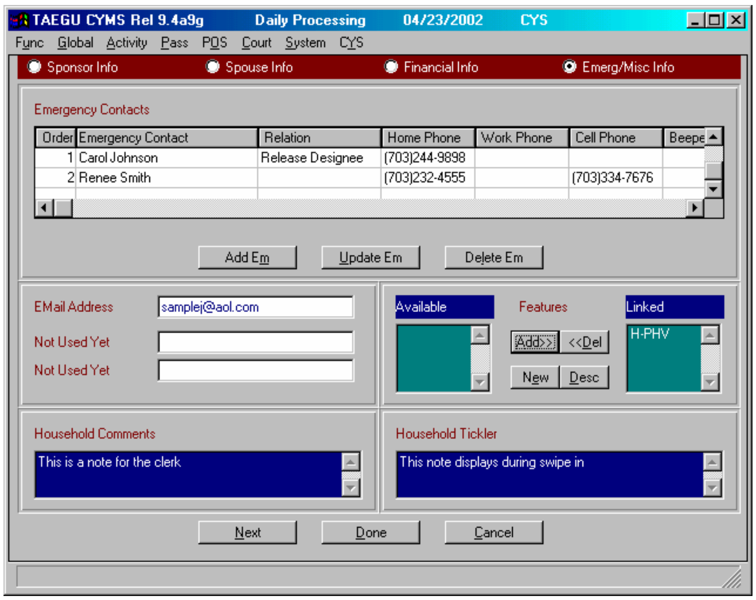
b. **Go to the <u>middle</u> boxed area**

1) Enter Family Size and annual USDA income as reported on the USDA eligibility form submitted to your State.
2) Make sure correct USDA category displays in the bottom box after you hit enter

c. Also in middle boxed area
1) Enter annual Family Income as shown on the DOD Application for Reduced Fees signed by the parent.
2) Make sure the correct DOD Income Category displays in the bottom box after you hit enter.
3) If a parent refuses to give income information, put in $999,999. They will get charged Cat VI rates. (The "9's" let us know you didn't just forget to put in the correct amount)

d. Click Next button to go to Emerg/Misc Info Screen.

5. EMERGENCY / MISC INFO SCREEN:



a. Click Add Em button
1) Enter applicable information about the Emergency Contact.
2) Can use the Relation field to put in whether this person is a Release Designee
3) Can also use the Country field for additional information (like whether this person is a Family Care Plan designee).
4) When finished, click the Update button.
5) Repeat the process for all Emergency Contacts
6) You can change the "who to call first" order by changing the Contact Numbers

b. Enter the sponsor's Email Address (if known)

c. Housing Area – Where does this family live?
1) Highlight appropriate entry in the Available column (to identify code, click the Desc button)
2) Click the Add button to move the code to the Linked column

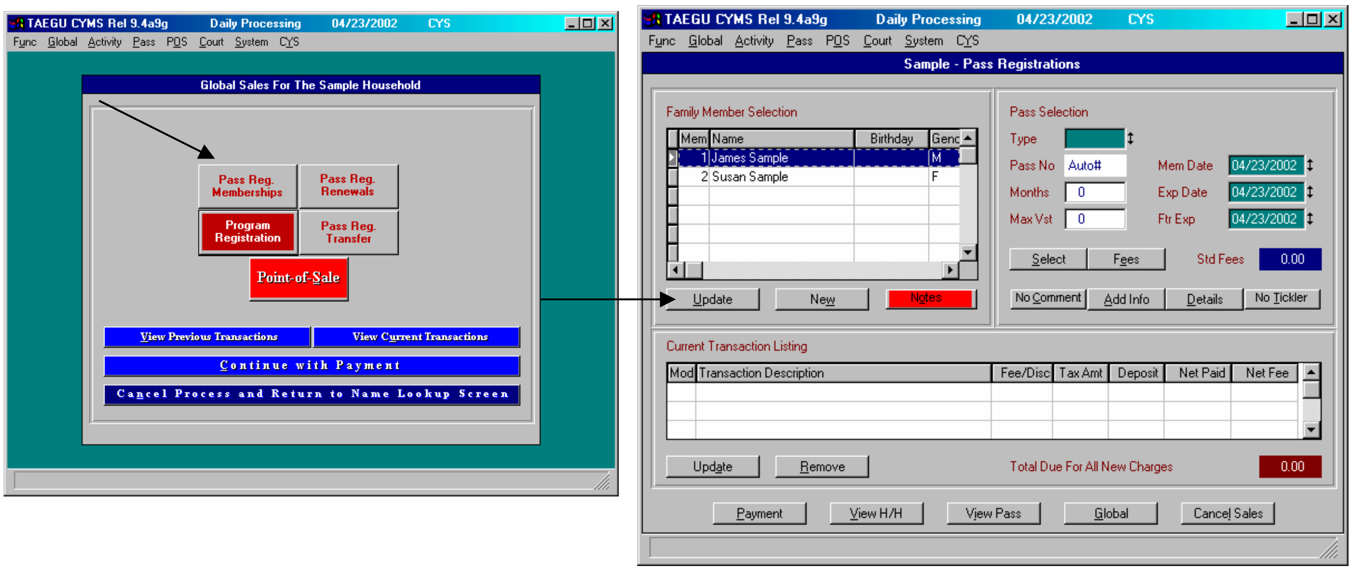
d. Household Tickler – Can be used to display message to parents at registration or swipe in (such as missing info needed) – but remember, what goes on must also come off !!

e. Click either Next or Done button to go to Global Sales Screen

f. Click Pass Registration Membership button where you will add information about the family members.

STEP 2 - FAMILY MEMBER INFORMATION

(From Global Sales screen, click Pass Registration Membership button)



1. FAMILY MEMBER #1 SCREEN: (ALWAYS THE SPONSOR)

a. **Highlight Family Member #1** (always the sponsor!) in the upper left browser

b. In the upper left boxed area, click **Update** button to go to FM#1 screen

c. Right click in green Relation box to bring up pick list.
   1) Hit a letter "S" to narrow down the list.
   2) Highlight "Sponsor" and double click.

d. Right click in green Ethnicity box to bring up pick list. Double click correct ethnic choice. (Note: #7 is Multi-Ethnic/Other)

e. Careful – the Active toggle means the file is not inactive! (It does not mean active duty !!!) You will probably not touch this toggle.

f. Check Gender. Change if necessary. (Default is "male")

g. Click **Done** button.

1. FAMILY MEMBER #2 SCREEN: (ALWAYS THE SPOUSE OR "NO" SPOUSE)

a. If there is no spouse, leave this screen exactly as it is. Click **Done** button and go to #3 below.

b. If there is a spouse, **highlight Family Member #2** in the upper left browser

c. Click **Update** button to go to FM#2 screen

d. If last name is different than default, overwrite it.

e. Right click in green Relation box to bring up pick list.
   1) Hit a letter "S" to narrow down the list.
   2) Highlight "Spouse" and double click.

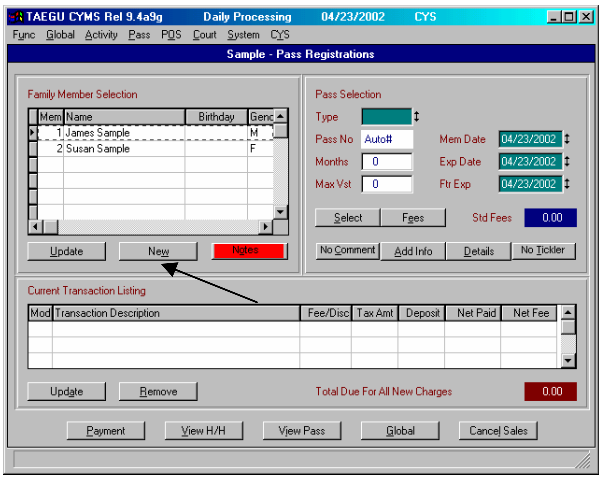
f. Right click in green Ethnicity box to bring up pick list. Double click correct ethnic choice. (Note: #7 is Multi-Ethnic/Other)

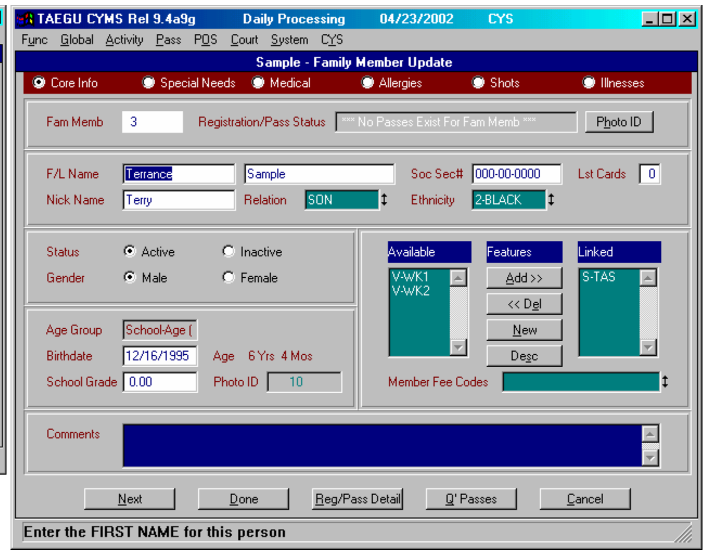
g. Careful – the Active toggle means the File is not inactive! (It does not mean active duty !!!) You will probably not touch this toggle.

h. Check Gender. Change if necessary. (Default is "female")

i. Click Done button.

6. FAMILY MEMBER #3 (THE CHILD) -- CORE INFORMATION SCREEN





a. Click New button to go to FM#3 screen so you can start entering information on the child.

b. Enter child's first name in the first blank space
   1) CAUTION: Make sure you didn't hit the Update button or you will overwrite the Sponsor file you just put in. Not a good thing to do! If there is already a name in this space, you are in the sponsor file – cancel and go back to step "a" above
   2) If last name is different than default, overwrite it.

c. Enter child's SSN. If you don't have SSN, leave the 000-00-0000 in place -- this is critical !!

d. Enter child's nickname (if applicable)

e. Right click in green Relation box to bring up pick list.
   1) Select the proper relationship to the sponsor (son, daughter, foster son, etc)
   2) Highlight your choice and double click.
      a. Right click in green Ethnicity box to bring up pick list. Double click correct ethnic choice. (Note: #7 is Multi-Ethnic/Other)

f. Check Gender. Change if necessary. (Default is "male")

g. Enter child's birthdate. Make sure age and age group display correctly.

h. If child is preschool age or older:
   1) Enter school grade. (PS=.25; K=.50; 1st=1.00, etc)

2) For K and older, go to the green Available column, highlight the school the child attends. (Click Desc to see description. Click Add button to move selection to the Linked column)

i. Click Next button.

4. FAMILY MEMBER #3 (THE CHILD) -- SPECIAL NEEDS SCREEN

a. Click toggles if child:
   1) Has Special Needs
   2) Is enrolled in the ACS EFMP program

b. If applicable, enter dates for:
   1) Initial SNRT Review
   2) Next SNRT Review

c. Use blue comments box to record any notes to yourself or file
   1) Example – need to schedule SNRT, contact EFMP, etc.
   2) Caution – anything you put in a comments block can be seen by others – do not include sensitive, confidential or derogatory information.

d. Move to boxed area at right to record misc. admin dates (as applicable):
   1) Health Assessment Form Date
   2) Last Sports Physical Date
   3) Child's Program Agreement Date
   4) Child's Last Profile Date

e. Click Next button.

5. FAMILY MEMBER #3 (THE CHILD) -- MEDICAL SCREEN

a. MEDICAL CONDITIONS (if applicable)

   1) Click Add Med button
   2) Click Med Condition toggle
   3) Right click green Med Code field to bring up pick list
   4) Highlight and double click a condition
   5) Add Orig Date (when condition first identified) and either accept or adjust the Next Review Date
   6) Click Update button to record
   7) Repeat for any additional medical or SNRT conditions

b. MEDICATIONS (if applicable)

   1) Click Add Med button
   2) Click Medication toggle
   3) Right click green Med Code field to bring up pick list
   4) Highlight and double click any ongoing medications
   5) Add Orig Date (when medication first administered) and accept or adjust the Next Review Date (it is set for a 30 day flag)
   6) Click Update button to record
   7) Repeat for any additional medications
   8) After "live" date, this can list can also be used to record short-term medications.

c. BASIC CARE ITEMS (if applicable)

   1) Click Add Med button
   2) Click Basic Care toggle
   3) Right click green Med Code field to bring up pick list
   4) Highlight and double click any ongoing approved basic care items

5) **Add Orig Date (when approval first granted) and accept or adjust the Next Review Date (it is set for a 30 day flag)**
6) **Click Update button to record**
7) **Repeat for any additional items**

d. Click Next button.

6. FAMILY MEMBER #3 (THE CHILD) -- ALLERGY SCREEN

a. Click Add Allergy button

b. Right click in green Allergy Code field to bring up pick list

c. Highlight and double click allergy

d. Add Orig Date (when allergy was first identified) and accept or adjust the Next Review Date. (Flag is set up for 30 days to revalidate the medication with the parent – this date can be overwritten).

e. If you have doctor/nurse approved guidance, enter reaction and treatment in the blue boxes. Be sure you partner with medical reps on this – CYS staff do not want to be responsible for what is said in these critical boxes.

f. Click Update button to record

g. Repeat for any additional allergies

h. Click Next button.

7. FAMILY MEMBER #3 (THE CHILD) -- SHOTS SCREEN

a. For CDS and SAS children --
1) **Click Load Std Shot button to produce a list of all shots.**
2) **Do not do this for MST children unless you plan to record all of their shots back to birth.**
3) **The computer calculates Due Dates based on number of days from birth.**
4) **Any shot that has a Due Date, but not a Completion Date, will be displayed on screen when a child tries to swipe into the center.**

b. To update shots that are due:
1) **Double click any shots you wish to update**
2) **BE CAREFUL – the cursor is in the Due Date field. You MUST first hit the TAB key to move to the Shot Date field or you will wipe out the due date. To get the date back, cancel and go back in.**
3) **The Shot Date is the date the shot was given.**
4) **If a shot was not given for a doctor/nurse verified reason, you can click the Waive This Shot toggle and put the reason why in the blue box.**
5) **If a child received a combination shot, mark off all individual shots involved in the combination and put the name of the combination shot in the blue box.**

c. If a child has a shot that is not on the already loaded "standard" list:
1) **Click the Add Shot button and see if the shot if on the pick list as a non-standard shot**
2) **If yes, double click and put in the Shot Date**
3) **If no, contact your CYMS POC and nurse and determine whether the shot should be added to the list.**
4) **Notify CFSC of any shots you think should be added or changed.**

d. Remember –
1) **Shot requirements change frequently, different children have different combinations of shots depending on requirements at their last location and changes in shot requirements.**
2) **Use waive, rather than delete to keep the audit trail in place.**

e. When all shots have been entered, click $\boxed{\text{Next}}$ button.

8. FAMILY MEMBER #3 (THE CHILD) – ILLNESS SCREEN

a. This screen will be used during daily operations to record illness and accidents.

b. To record an illness:
1) Click $\boxed{\text{Add Illness}}$ button
2) Highlight and double click an illness/injury
3) Type in date
4) Record any comments in blue box
5) Click $\boxed{\text{Update}}$ button

9. TO FINISH !!!!!

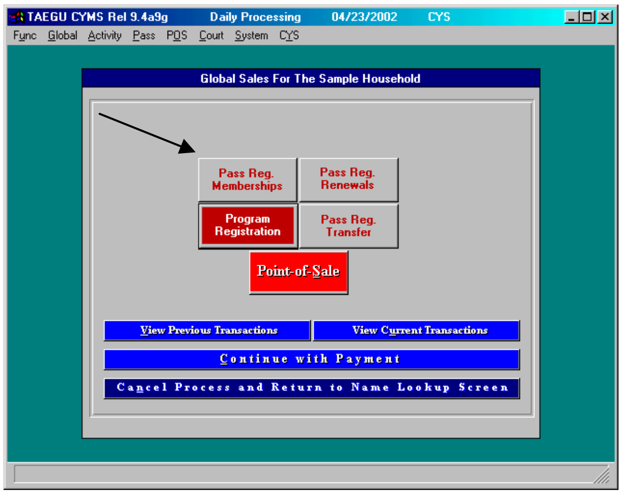
a. This is the end of the FM#3 file. You will be taken back out to the Pass Registration screen

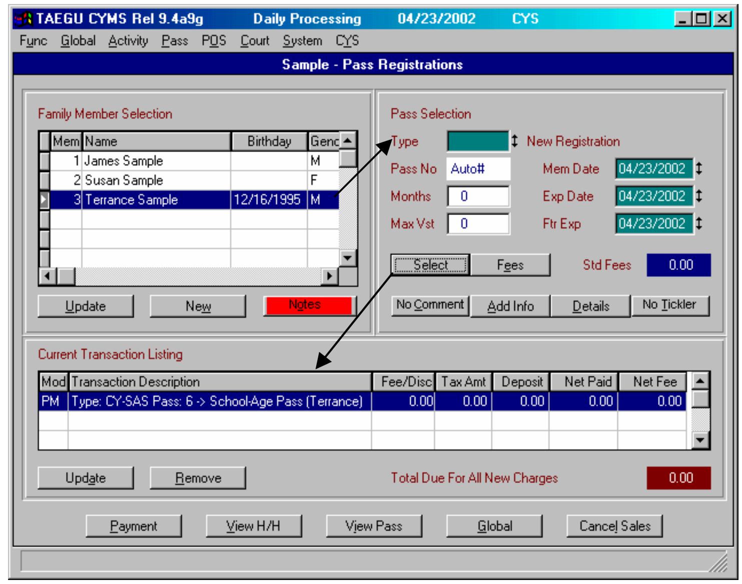
b. If you have more family members to add, you will click the $\boxed{\text{Add}}$ button and follow steps 3-9 above.

c. If you are finished, adding family members, you will proceed with Pass Registration.

STEP 3 - PASS REGISTRATION

(From Global Sales screen, click Pass Registration Membership button)





1. PASS BACKGROUND:

a. A pass gives a child permission to use any CYS program (hourly care, regular FD/PD care in CDC/SAS/FCC, sports, instructional classes). It is the equivalent of our annual registration.

b. To get a pass, a family must pay the annual registration fee and have a current household file.

c. There are three kinds of age-based passes that parents must pay for:
   1) CY-Child (normally issued to all children birth to 5.99 years – if kindergarten children are served in SAS instead of CDC, this pass may be adjusted to stop at 4.99 years)
   2) CY-SAS (normally issued to all children 6.00-12.99 years – if kindergarten children are served in SAS instead of CDC, this pass may be adjusted to start at 5.00)
   3) CY-MST (issued to all children 13.00-18.99 years)

d. In addition, there is a no charge pass called CY-MZZ (youth privilege).
   1) It is given to all CY-Child and CY-SAS children (even infants !!!)
   2) It allows us to count them in a different way when then swipe into YS programs.
   3) This pass MUST have the same expiration date as the companion CY-Child or CY-SAS pass.

2. TO ISSUE A PASS:

a. Selecting the child/children:
   1) Highlight the child who needs the pass
   2) If there is more than one child needing the exact same kind of passes (Ex - both get CY-Child or both get CY-SAS), hold down the Control key on your keyboard and highlight both children.

b. Selecting the Pass:

1) In the Pass Selection boxed area, right click in the green Type box to get the pick list.
2) Use the gray buttons at the right of the browser to highlight the age appropriate pass
3) For Child and School-Age children, hold down the Control key and also highlight the CY-MZZ pass using the small gray buttons on the left side of the browser.
4) Click the Select button. You will see the word "Multi" appear in the green box

c. Checking the Dates --- THIS IS CRITICAL !!!!!
1) The system automatically puts in a Membership Date of today.
2) Expiration Date will default to one year later – this is when the family will need to come back in and renew their registration.
<u>NOTE</u>: If this family is coming to you from another installation and their pass is still valid, you will overwrite the automatic date and put their REAL expiration date in the field. It will probably be earlier than the date showing.

d. Checking the Money – THIS IS ALSO CRITICAL !!!!!
1) In the blue Std Fee block to the right, you should see your standard registration fee amount. If this is the correct amount or if you are going to WAIVE this fee (for an FCC provider or a hardship case), you can proceed to #e below.
2) There two standard reasons why this fee may not be correct – and why you may need to take some extra steps on this screen:
a) This may the 3rd child in the family and the family is eligible for a "family rate"
b) This family still has a valid pass from another installation and you do not charge them again.
c) NOTE: If you are WAIVING this fee (for an FCC provider or a hardship case, for example) – we keep track of this discounted amount in a different way so you MUST leave the amount due here on this screen !!!!!
3) So --- If this amount is truly not correct and this is not a discount situation, you will need to click the Fees button. This will take you to another screen.
4) In the Fee Amt column, highlight the existing fee and change it to the correct amount or to zero. And then click OK. If you also issued a CY-MZZ pass, the fee screen will appear again for that pass. Since that is a no fee pass, you should click OK again. This will take you back to the main screen.

e. Finishing Up (Pass)
1) If the dates and fees are OK, click the Select button
2) This will move your choices down to the browser (the "shopping cart") at the bottom of the screen.
3) If you have another type of pass to issue to another child, repeat steps a-c above.
4) If you are finished issuing passes, click the Global button to go back to the Global Sales screen. You will next put the child/children into any classes they may be currently enrolled in.

NOTE: IF THE CHILD IS NOT GOING TO BE ENROLLED IN ANY CLASSES AT THIS TIME, YOU CAN CLICK THE PAYMENT BUTTON TO FINISH THE PROCESS. GO TO # 4 BELOW (IN THE CLASS SECTION) FOR SPECIFIC INSTRUCTIONS ON THIS PROCESS.

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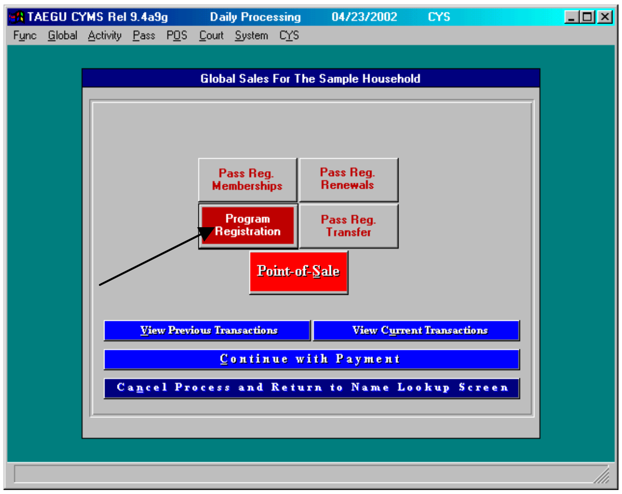
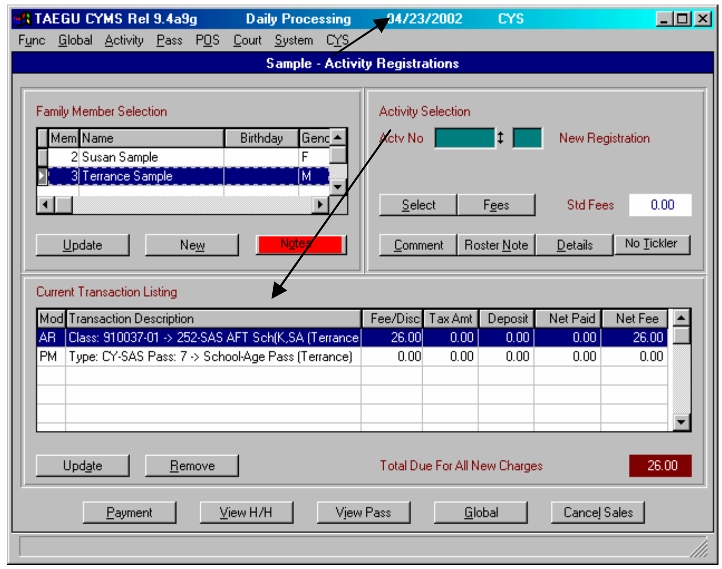
Updated Apr 04

STEP 4 - PROGRAM / ACTIVITY REGISTRATION

(From Global Sales screen, click Program Registration button)





1. ACTIVITY BACKGROUND INFORMATION:

a. **For the initial data input exercise, it is critical to get all regularly scheduled full day and part day children (PDPS, B/A school, etc) into the correct classroom activities.**

b. **<u>Hourly children do not go into an activity</u>. The pass gives them permission to use any CYS program. When they want to use hourly care, they make a reservation or just drop in. They are most definitely not enrolled into a regular class.**

c. **Regularly scheduled (FD/PD/BA) children in FCC homes, must also be enrolled in their provider's home. All FCC providers have been set up as "activities"**

d. **Children signed up for youth sports, instructional classes, clubs, etc. will be placed into their proper activities based on rosters current just before the "live" date.**

2. ACTIVITY PROCESS:

a. **Selecting the child and the activity:**
   1) **Highlight the child who is to go into the activity**
   2) **Right click in the green Activity Type box to get the pick list**
   3) **Use the gray buttons at the right of the browser to highlight the class (or classes if the child is enrolling in more than one activity)**
   4) **If the child is enrolling in more than one activity, hold down the Control key and highlight any additional classes**
   5) **Click the Select button. If this is an installment billed class, you will see a box pop up asking you for the Enrollment Start date.**

b. **Enrollment Start Date --- THIS IS CRITICAL !!!!!**
   1) **The system automatically puts in a Start Date of today. BE CAREFUL. Make sure you put in the REAL date the child will start attending the class. CYMS will pro-rate the amount due from the start date to the end of the first partial month.**
   2) **If you leave in today's date, the computer will start charging the family for that class starting right now. CYMS will think that that family owes you more money than they really do – and that doesn't make them very happy. It is an ugly situation that is very difficult to correct!!!**
   3) **So please --- you have to make sure the REAL START DATE is placed in this enrollment start box and that the fee amount is correct.**

3. ACTIVITY ERROR MESSAGES: Please pay attention to what they say !!!!

a. **If a child does not have a current pass, CYMS will not let you enroll them in any activity that "Requires Current Pass Membership". That is one of the toggles we clicked on when we were setting up the class activities.**

b. **If you get a message saying "No rate category has been created for this criteria . . . ." you cannot put a child in a class. This means there is either no DOD income listed on the HH financial screen or you didn't link your activity to a program type on the CYMS screen during activity setup. You must go out and find and fix the source of the problem.**

c. **If you don't have a family member selected when you select an activity, you will get a message saying "No Family Member Selected" -- go back and highlight a family member to be put into the activity.**

d. **If a child is outside the age or grade range for a class, you will get a message telling you this. You can override this message.**

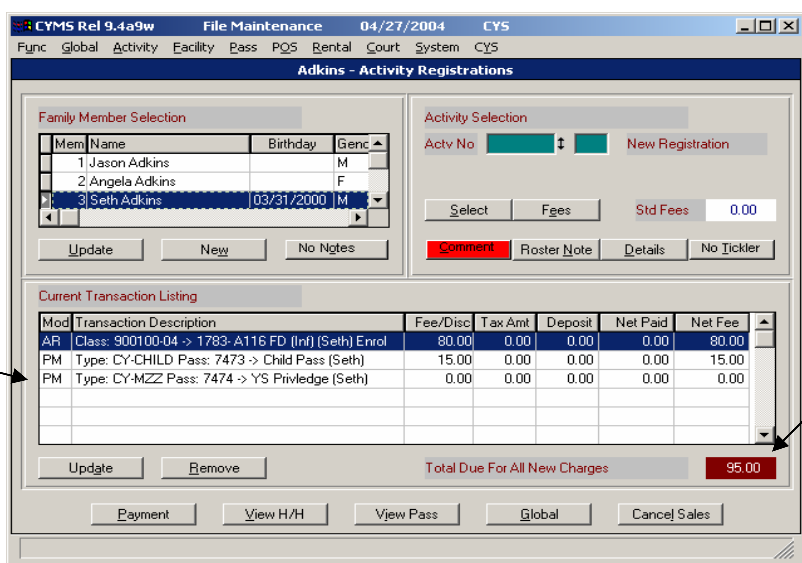
e. **If a class is full (the number of children enrolled equals the listed maximum count) you will get a message. You cannot place the child in this activity.**

f. **If the child is already enrolled in another activity that has a date or time conflict with the new class, you will get a message. You can override this message.**

4. FINISHING UP (ACTIVITY):

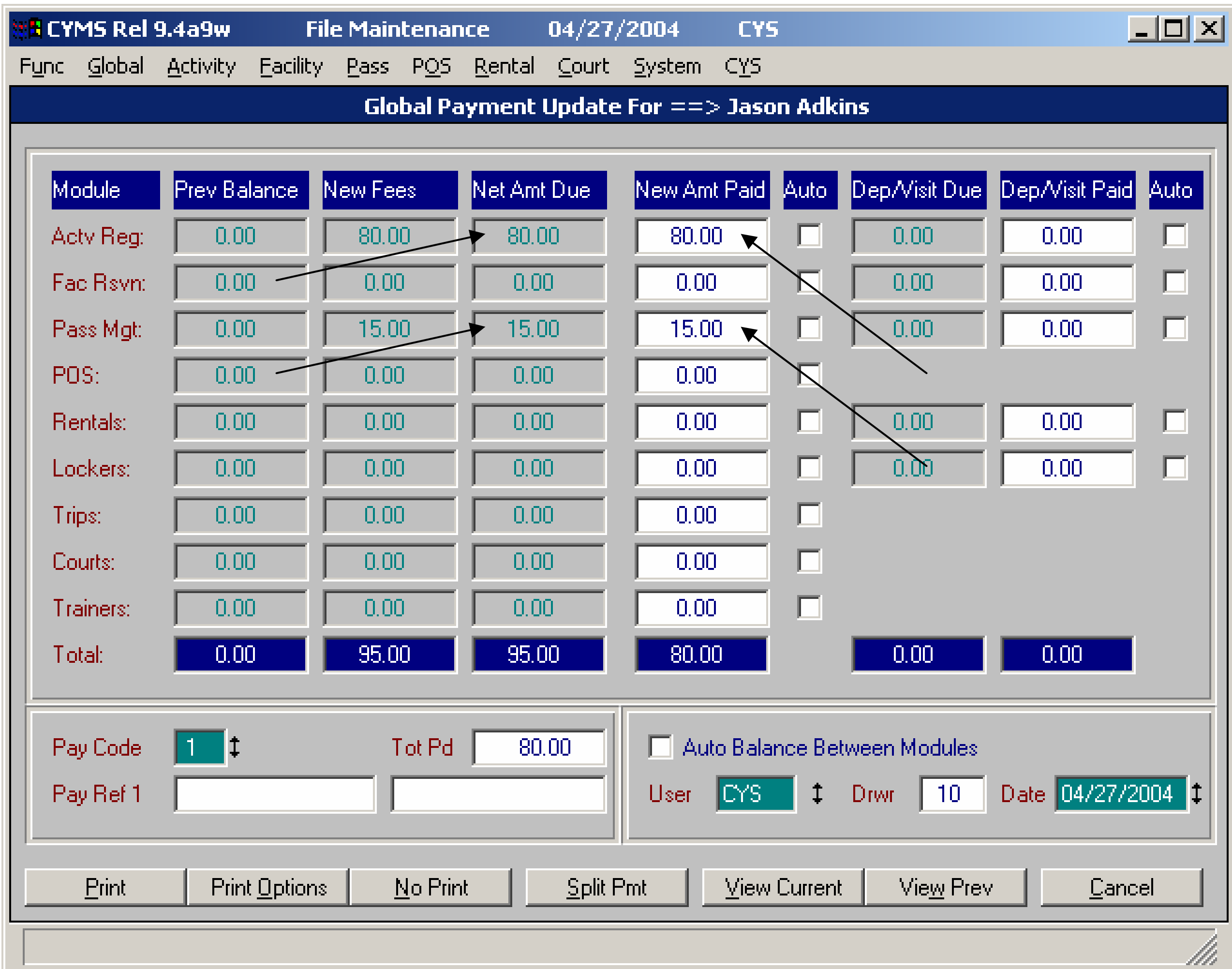
a. **If the dates are OK, click the Select button**

b. **The class/classes you selected will be moved to the browser along with the passes you selected earlier.**



c. Any fees (for passes or classes) should be showing in the Total Due for All Charges field. If something is wrong and you do not want to process this enrollment, you can highlight any of the "classes" in the browser and click Update or Remove and make changes – or you can click the Cancel button at the bottom or the screen and start the entire process over again. If you are unsure (maybe there is something wrong), remember it is much harder to undo after the fact than to fix it when you first notice it. It is better to cancel and re-do the process if you think it may not be 100% correct.

d. If everything looks good, press the Payment button. It will take you to a detailed payment screen – where you can either take the payment or leave it as a charge on the household.



e. If you are going to take a payment (or process a discount), look in the NET AMOUNT DUE column – this is where you will see exactly what is due. You will enter the amounts paid in the white fields EXACTLY OPPOSITE the amounts due.

- BE CAREFUL !!!!! Part of the money might go against the "activity" registration AND part of the money might be against the "pass" registration. Make sure you put the amount next to the correct fee or the bookkeeping will get all messed up!

- If you are going to give a discount (to an FCC provider or hardship or special case), you would right click in the Pay Code field and select the appropriate discount Pay Code. If the parent is paying, you would select a code for cash, check or credit card.

- Use the Reference field for any notes (check number, why you gave a discount, etc)

f. **If all is good, press the Print button (if you want a receipt to print) or No Print if you don't want a receipt.**

g. **You will see a Change Due screen – you may get stopped by a box asking if you want to print a pass. Hit the Skip All button and then the OK button.**

h. **The system will take you out to the browser. Your transaction is complete.**

NOTE: MORE DETAILED INSTRUCTIONS ON PROCESSING PAYMENTS CAN BE FOUND IN THE "TAKING PAYMENTS" TRAINING GUIDE.

STEP 5 - VALIDATION – HOW DO I KNOW IF I DID IT RIGHT?

1. TO CHECK FOR PASSES:

a. **Go to Inquiry ➔ Global ➔ Global Household Inquiry**

b. **Enter the first few letters of the last name and select your family**

c. **To view passes for a single child:**
   1) **Highlight the child**
   2) **Press the Passes button**
   3) **Be sure to double check pass description for age appropriateness and member date (this should be the actual registration date, not today's date!)**
   4) **Be sure all CY-Child and CY-SAS children also have a CY-MZZ pass.**

d. **To view passes for all children in a HH, leave all family members unhighlighted (double click on the highlight to remove it).**

2. TO CHECK FOR ACTIVITY/PROGRAM ENROLLMENTS:

a. **Go to Inquiry ➔ Global ➔ Global Household Inquiry**

b. **Enter the first few letters of the last name and select your family**

c. **To view activity/program enrollments for a single child:**
   1) **Highlight the child**
   2) **Press the Activity Reg button**
   3) **Be sure to double check class description for age appropriateness and enrollment date (this should be the projected live date, not today's date!)**
   4) **Be sure there is no money showing during this initial data input phase.**

d. **To view activity enrollments for all children in a HH, leave all family members unhighlighted (double click on the highlight to remove it).**

3. TO PRINT A ROSTER OF CHILDREN ENROLLED IN A CLASS:

a. **Go to Reports ➔ Activity ➔ Activity Roster Reports ➔ Activity Rosters or click the Program Roster hot button**

b. **Selecting a class range:**
   1) **To view one class, highlight that class on the left side of the screen and click Browser Only toggle**
   2) **To view multiple random classes, individually highlight the classes you want and click the Browser Only toggle. Hold down the Control Key and click on the gray boxes on the far left of the browser.**
   3) **To view a consecutive range of classes, use the Beg Act and End Act fields to bracket the range and click the Range and Browser toggle**
   4) **To view all classes, leave the Beg Act field blank and the End Act field as 999999 ZZ and click the Range and Browser toggle**

c. **Using the date range:**
   1) **Leave a broad range to see all enrollments**

2) Narrow the range to see erroneous entries scheduled to start before your live date.

d. Press the Details>> button to set up the format of your report:
   1) Add up to 4 items from the green field on the left side to create a custom view
   2) Suggestions for a quick check initial data setup might be: Age, Grade, Enrollment Date (should be your projected start date) and Amt Due (which should be zero until you go live)

e. When you are ready, click the Print button
   1) Click the Preview button to view on screen
   2) Click the Print button to print or the No Print button if you do not want a hard copy

f. Play with different settings to get the custom report you desire.

4. TO CHANGE A PASS EXPIRATION DATE:

a. Go to Files ➔ Pass ➔ Pass Member Maintenance

b. Enter your family member or pass number.

c. Adjust whether the pass is "Expired" or "Active"

d. Adjust the appropriate dates:
   1) The Original Member Date will stay the same (this is when the child enrolled with you for the very first time)
   2) Change the Current Member Date, if applicable
   3) Change the Current Expiration Date, if applicable (it will not change on it's own if you change the Current Member Date

e. Don't forget to change BOTH the age-appropriate pass (CY-Child, CY-SAS) AND the CY-MZZ pass.