CYMS TRAINING GUIDE

CTG-A03 WAITLIST PROCESSING

Updated Apr 04

Search For Care

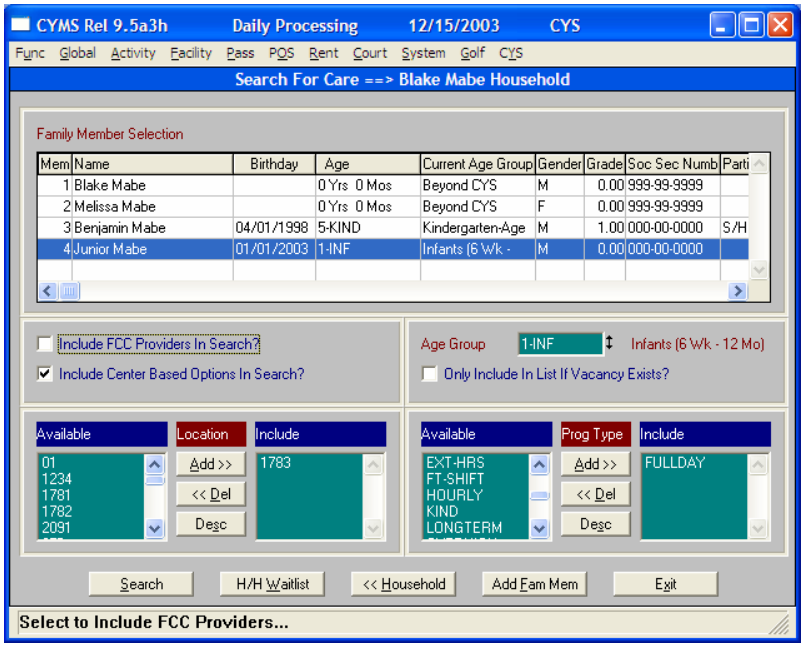
The Search for Care process is used to place someone on the center waitlist, to give provider referrals, and to waitlist people for provider openings. It also allows you to delete someone from the waitlist, to renew someone's waitlist entry, and change waitlist statuses, dates, priorities, or other criteria.

Go to Daily → CYS → CYS Search For Care.

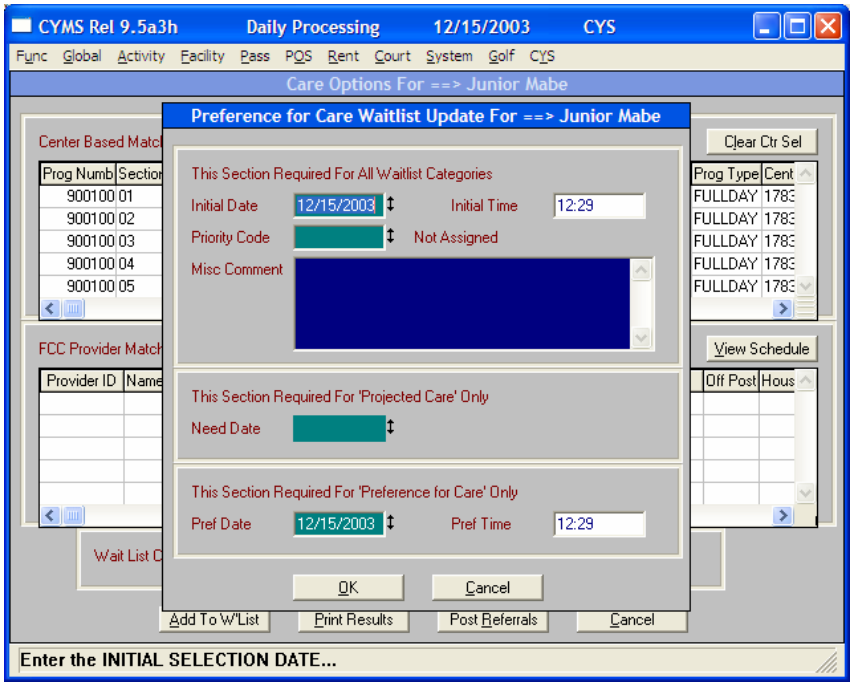
To place someone on the center waitlist:

1. Lookup the household and select it.
2. Select the **Include Center Based Options in Search** toggle; untoggle **Include FCC Providers In Search.** For the initial data entry process, this will be untoggled. Once a base is live with CYMS, you will always keep this option toggled—it will allow you to give provider referrals and determine which waitlist the customer should go on.
3. Select the child that needs care. The **Age Group** field is filled in. If the child is unborn, you should change the **Age Group** to Infant.
4. In the **Prog Type** dual selection list (on the bottom right of the screen) click on the appropriate program type(s) in the Available column and click **Add>>**. It is possible to select multiple Program Types (e.g., BEF-SCH, AFT-SCH). If you add one by mistake, select it in the Include column and click **<<Del**.
5. If your base has multiple CDCs or SASs, the parent might have a location preference. If so, in the **Location** dual selection list (on the bottom left of the screen) click on the proper location(s) in the Available column and click **Add>>**. If no location preference is added, the parent will be waitlisted for any center that provides the care they are looking for.

The screen should look similar to the following:



6. Click **Search**.
7. Select the proper **Wait List Category** and click **Add to Waitlist**.



8 If you selected Projected Care, complete the **Initial Date**, **Initial Time**, **Priority Code**, **Misc Comment** (if applicable), and **Need Date** fields.

If you selected Excess Demand, complete the **Initial Date**, **Initial Time**, **Priority Code**, and **Misc Comments** (if applicable) fields.

If you selected Preference For Care, complete the **Initial Date**, **Initial Time**, **Priority Code**, **Misc Comments** (if applicable), **Pref Date**, and **Pref Time** fields.

Note: The Excess Demand list is sorted by Priority by Initial Date by Initial Time. The Preference For Care list is sorted by Preference Date and Preference Time.

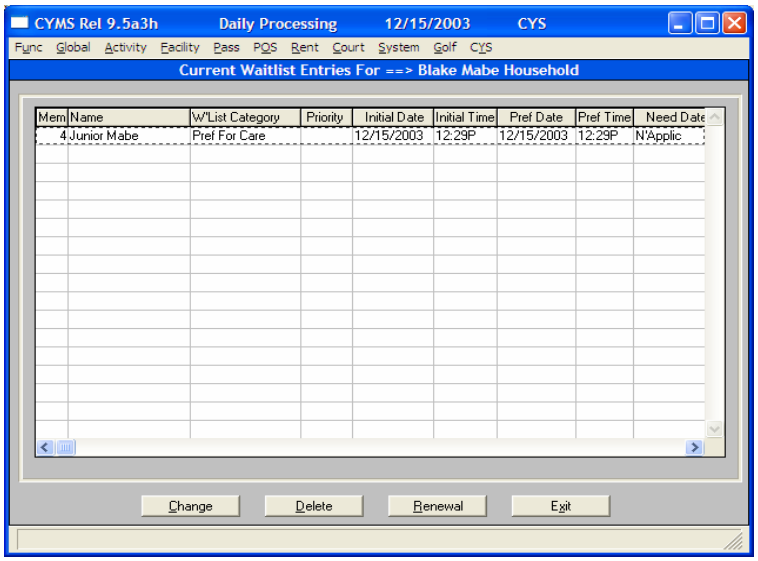
9 Click **OK** and **Yes** to add the person to the waitlist. If you chose the wrong waitlist category in step 7, click **No** and re-add them.

To Delete Someone From the Waitlist:

1 Go to Daily → CYS → CYS Search For Care.

2 Lookup the household and select it.

3 Click **HH Waitlist**. This will show anyone in the household who has been placed on the waitlist.



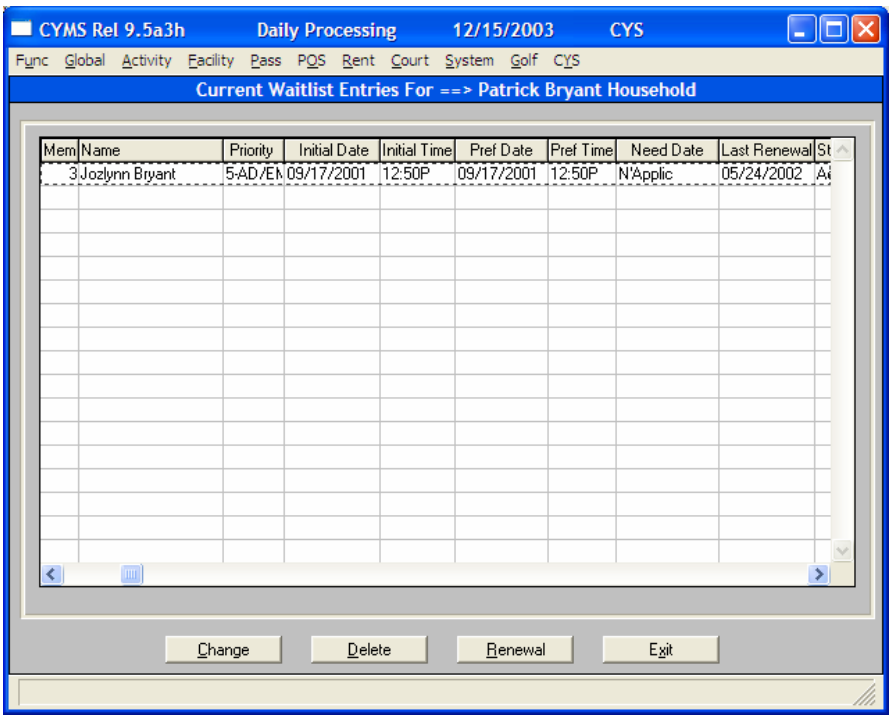
4 Select the child you wish to delete and click **Delete**. This will remove the child from the waitlist **and** any notes that were linked to the child's waitlist entry. The household, however, will still exist in the database.

To Renew Someone's Waitlist Entry:

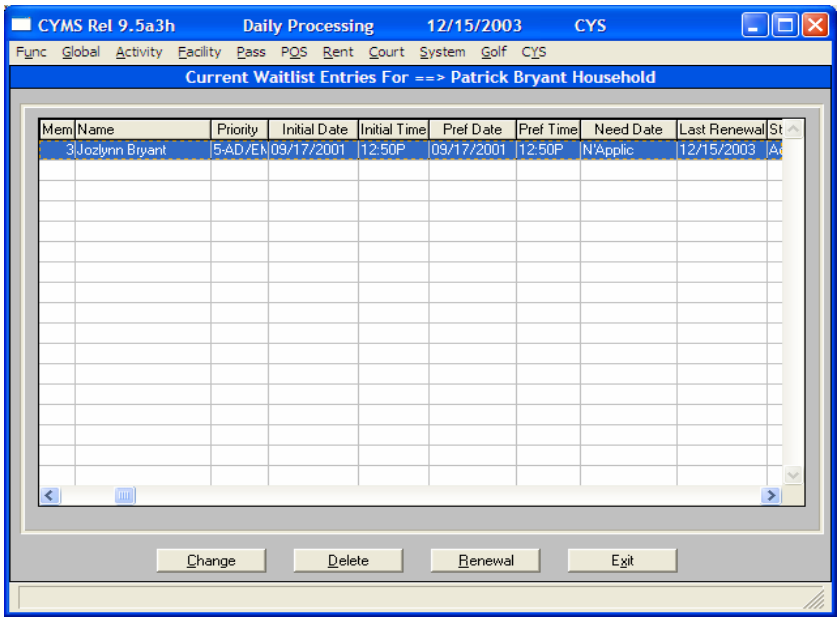
1 Go to Daily → CYS → CYS Search For Care.

2 Lookup the household and select it.

3 Click **HH Waitlist**. This will show anyone in the household who has been placed on the waitlist.

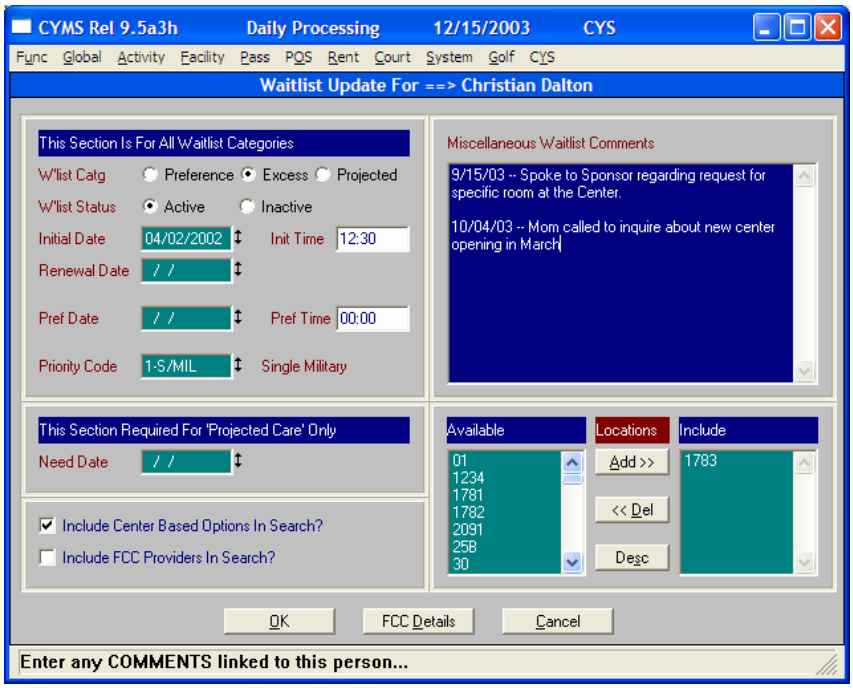


4 Select the child you wish to renew and click **Renewal**. The current date will be added to the **Last Renewal** field. The Last Renewal date is the date we use to compare against when you are running the Waitlist Status Change or Waitlist Purge program. If there is no last renewal date, the system will use the initial date linked to the waitlist record.



To Make Someone Active or Inactive on the Waitlist:

1. Go to Daily → CYS → CYS Search For Care.
2. Lookup the household and select it.
3. Click **HH Waitlist**. This will show anyone in the household who has been placed on a waitlist.
4. Select the child you wish to make active or inactive and click **Change**.



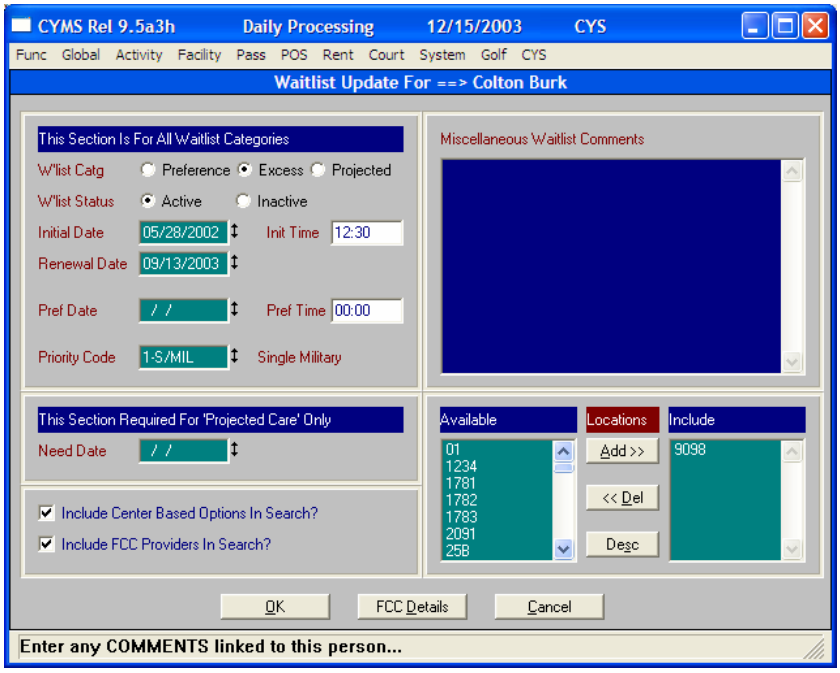
5. Change the **Waitlist Status** as applicable, make a note in the Miscellaneous Comment field, and click **OK**. Children with a waitlist status of Inactive do not appear on the waitlist. When a child is Inactive on the waitlist, Miscellaneous Comments tied to the waitlist record are still accessible.

Note: To make multiple people on the waitlist Active or Inactive, see the HH Waitlist Status Change section on page 11.

Changing Information on an Existing Waitlist Record

This is the process that is used when the waitlist record already exists (Search for Care has been run) but something about the record isn't correct. For example, the wrong Priority got linked, a date was entered wrong, or the wrong location was linked, etc.

1. Go to Daily → CYS → CYS Search For Care.
2. Lookup the household and select it.
3. Click **HH Waitlist**. This will show anyone in the household who has been placed on a waitlist.
4. Select the child you wish to update and click **Change**.



5 This is the entire waitlist record. Any field can be changed on this screen or on the subsequent FCC Details and More Opt screens. Make your changes and click **OK** or **Process**.

Note: To change the **Age Group**, click **FCC Details**. From the FCC Details screen, click **More Opt** to change the **Program Type**. Be careful changing FCC data on these screens; the changes made here will potentially change the position of the person on the waitlist.

To Waitlist Someone for Both the Center and FCC and Give Provider Referrals

This is the recommended process that should be used once a base goes live in CYMS.

1 Go to Daily → CYS → CYS Search For Care.

2 Lookup the household and select it. Select the child you want to add to a waitlist.

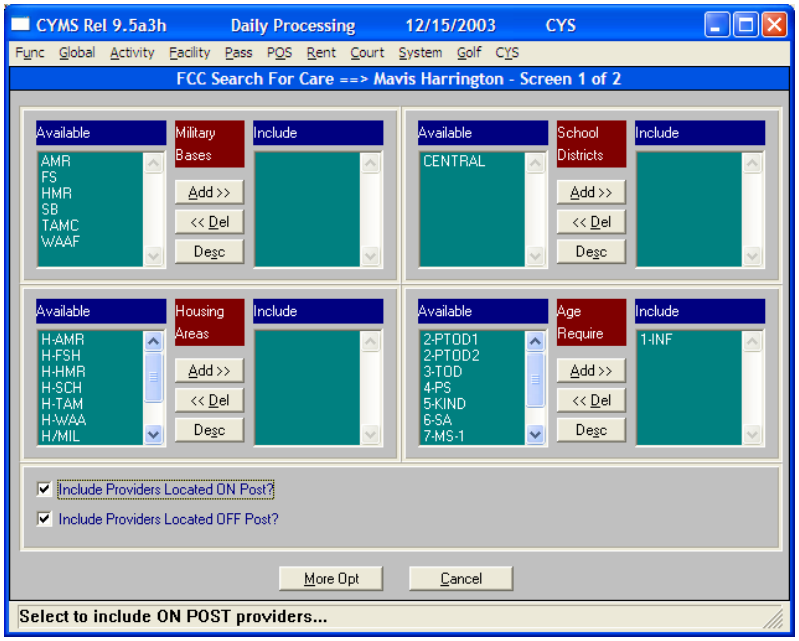
3 Select the **Include Center Based Options in Search** toggle; select the **Include FCC Providers In Search** toggle.

4 When you highlight the child, the **Age Group** field is filled in. If the child is unborn, you should change the **Age Group** to Infant.

5 In the **Prog Type** dual selection list (on the bottom right of the screen) click on the appropriate program type(s) in the Available column and click **Add>>**. It is possible to select multiple Program Types like (e.g., BEF-SCH, AFT-SCH). If you add one by mistake, select it in the Include column and click **<<Del**.

6 If your base has multiple CDCs or SASs, the parent might have a location preference. If so, in the **Location** dual selection list (on the bottom left of the screen) click on the proper location(s) in the Available column and click **Add>>**. If no location preference is added, the parent will be waitlisted for any center that provides the care they are looking for. You don't need to include provider locations on this screen—other criteria on subsequent screens will determine which providers can help the parent.

7 Click **Search**.

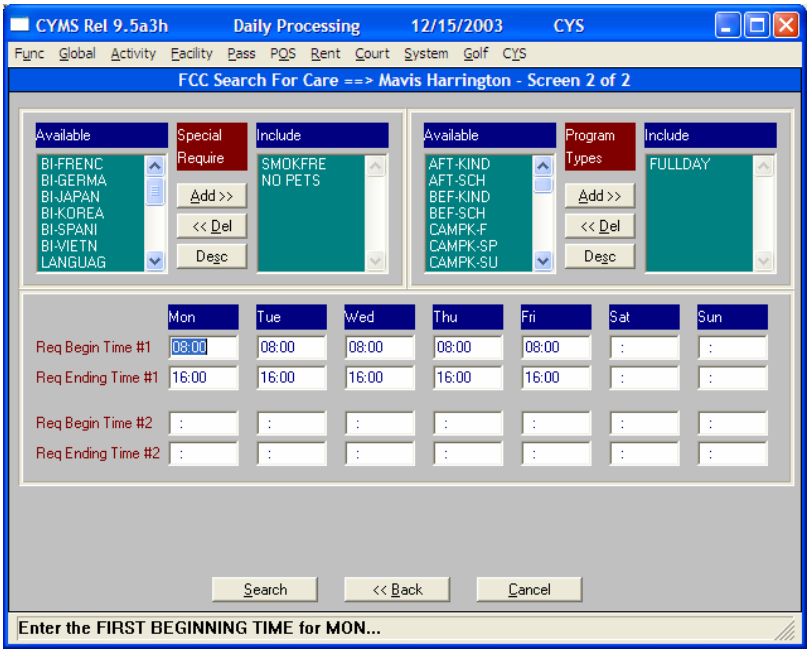


8 If parents have specific requests for providers in certain **Housing Areas** or **School Districts**, add those requests to the appropriate Include column. Otherwise, if the Include column is blank, the search will include any provider in any school district or housing area.

9 Select the **Include Providers Located ON Post?** option and the **Include Providers Located OFF Post?** option.

10 The **Age Require** group should default in, but if the Include column is blank, make sure you add the appropriate age group being searched for.

11 Click **More Opt**.



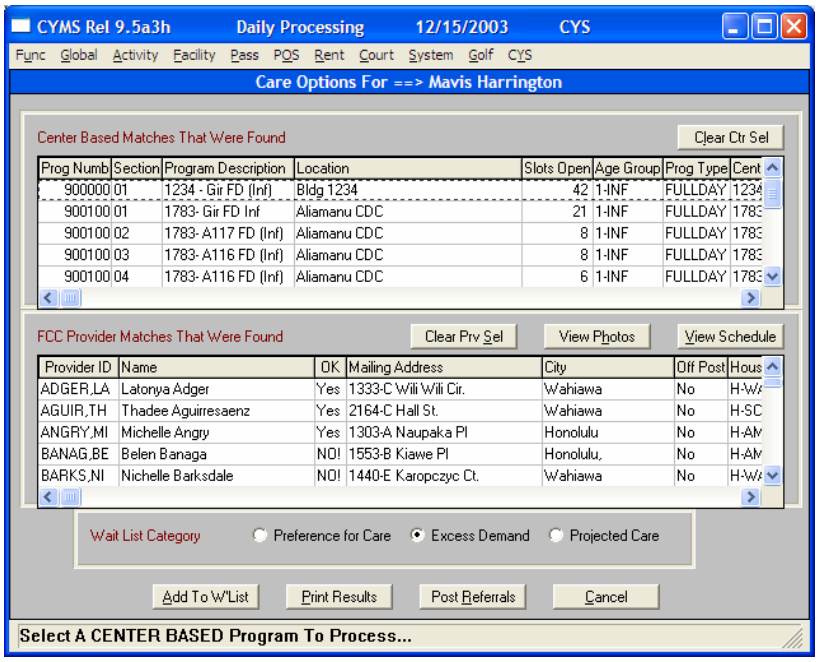
12 Add any **Special Requirements** the provider must have to be a viable match for this parent. If you link more than one, the providers must have all the requirements linked to their Provider Module Record to be considered a valid match. If you are unsure what any code stands for, click on the code and then click **Desc**.

13 The **Program Type** should default in, but if it doesn't, add the proper Program Type(s) to the Include column. As with the center search it is possible to add more than one (e.g., BEF-SCH and AFT-SCH).

14 Fill in the appropriate times and days that this parent needs care.

Note: For people looking for before and after school care, use Begin/End Time #1 for the before times and Begin/End Time #2 for the after times.

15 Click **Search**.



16 Providers with **Yes** in the **OK** column are providers who match all the codes/criteria that were selected during the search and have no schedule conflicts. Providers with **No** in the **OK** column match all the codes/criteria that were selected during the search but have schedule conflicts. To view the problem, highlight the provider and click **View Schedule**.

To post referrals, click **Post Referrals**. If you select to **Post Only 100% OK** (recommended), only the OK Yes's will get a referral. If you select **Post All Referrals**, the OK Yes's *and* OK No's will all get a referral. Referrals can be viewed in the FCC Provider Module or on the FCC Provider Referral report.

To print a list of providers to give to the parent, click **Print Results**. Select what you want printed on the list and click **Print**.

Note: The **Print Schedule Details For FCC Providers On List** option is not recommended, since it shows each provider's schedule in half hour blocks Monday–Friday. The **Print Only FCC Provider Matches That Are 'OK'** option will list just the OK Yes's.

17 If you wish to continue and put this child on the FCC or center waitlist, select the proper **Wait List Category** and click **Add To W'list**.

18 If you selected Projected Care, complete the **Initial Date**, **Initial Time**, **Priority Code**, **Misc Comment** (if applicable), and **Need Date** fields.

If you selected Excess Demand, complete the **Initial Date**, **Initial Time**, **Priority Code**, and **Misc Comments** (if applicable) fields.

If you selected Preference For Care, complete the **Initial Date**, **Initial Time**, **Priority Code**, **Misc Comments** (if applicable), **Pref Date**, and **Pref Time** fields.

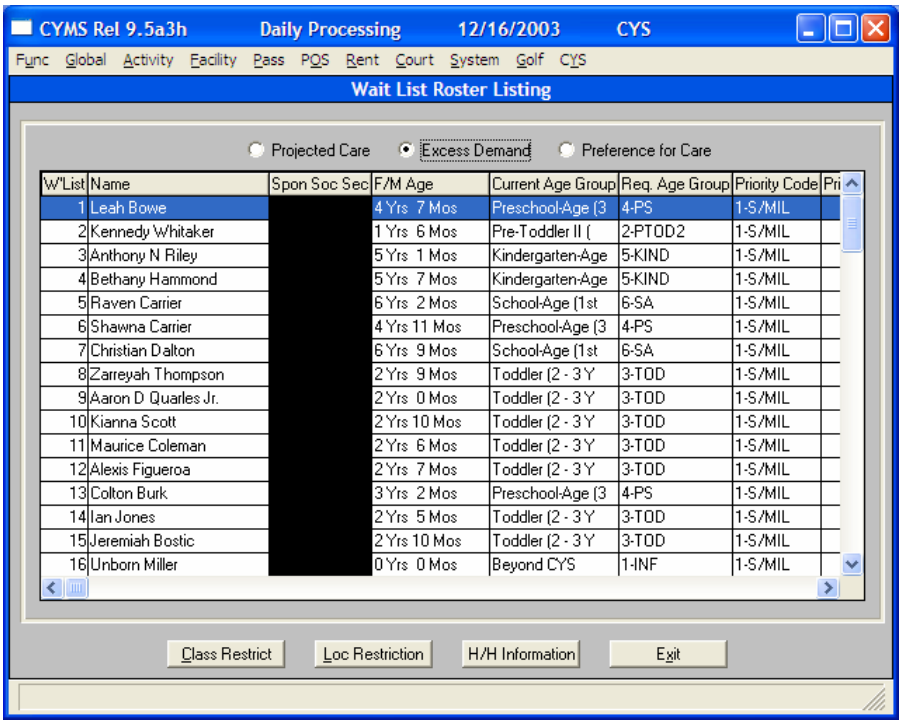
Note: The Excess Demand list is sorted by Priority by Initial Date by Initial Time. The Preference For Care list is sorted by Preference Date and Preference Time.

19 Click **OK** and **Yes** to add the person to the waitlist. If you chose the wrong waitlist category in step 7, click **No** and re-add them.

Waitlist Inquiry

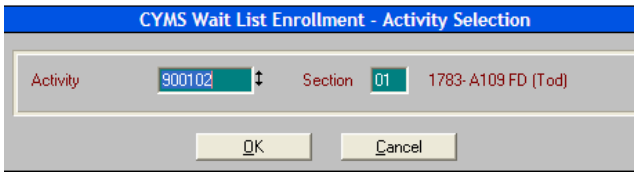
The Waitlist Inquiry allows you to view each waitlist (projected, excess, and preference).

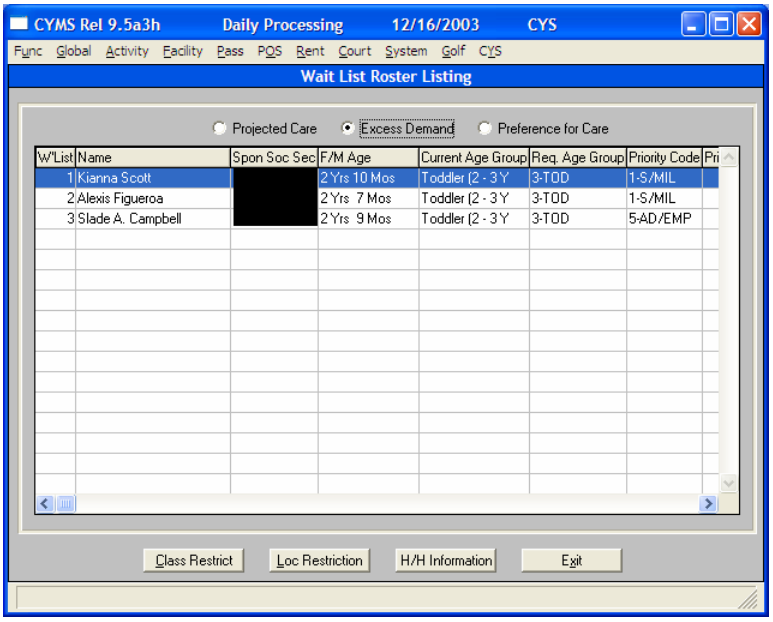
1 Go to Inquiry → CYS → CYS Waitlist Inquiry. When you first go in to this program, everyone on the waitlist is displayed—Infants mixed with pre-toddlers, etc.



W'List	Name	Spon Soc Sec	F/M Age	Current Age Group	Req. Age Group	Priority Code	Pri
1	Leah Bowe	[redacted]	4 Yrs 7 Mos	Preschool-Age (3	4-PS	1-S/MIL	
2	Kennedy Whitaker	[redacted]	1 Yrs 6 Mos	Pre-Toddler II (	2-PTOD2	1-S/MIL	
3	Anthony N Riley	[redacted]	5 Yrs 1 Mos	Kindergarten-Age	5-KIND	1-S/MIL	
4	Bethany Hammond	[redacted]	5 Yrs 7 Mos	Kindergarten-Age	5-KIND	1-S/MIL	
5	Raven Carrier	[redacted]	6 Yrs 2 Mos	School-Age (1st	6-SA	1-S/MIL	
6	Shawna Carrier	[redacted]	4 Yrs 11 Mos	Preschool-Age (3	4-PS	1-S/MIL	
7	Christian Dalton	[redacted]	6 Yrs 9 Mos	School-Age (1st	6-SA	1-S/MIL	
8	Zarreyah Thompson	[redacted]	2 Yrs 9 Mos	Toddler (2 - 3 Y	3-TOD	1-S/MIL	
9	Aaron D Quarles Jr.	[redacted]	2 Yrs 0 Mos	Toddler (2 - 3 Y	3-TOD	1-S/MIL	
10	Kianna Scott	[redacted]	2 Yrs 10 Mos	Toddler (2 - 3 Y	3-TOD	1-S/MIL	
11	Maurice Coleman	[redacted]	2 Yrs 6 Mos	Toddler (2 - 3 Y	3-TOD	1-S/MIL	
12	Alexis Figueroa	[redacted]	2 Yrs 7 Mos	Toddler (2 - 3 Y	3-TOD	1-S/MIL	
13	Colton Burk	[redacted]	3 Yrs 2 Mos	Preschool-Age (3	4-PS	1-S/MIL	
14	Ian Jones	[redacted]	2 Yrs 5 Mos	Toddler (2 - 3 Y	3-TOD	1-S/MIL	
15	Jeremiah Bostic	[redacted]	2 Yrs 10 Mos	Toddler (2 - 3 Y	3-TOD	1-S/MIL	
16	Unborn Miller	[redacted]	0 Yrs 0 Mos	Beyond CYS	1-INF	1-S/MIL	

2 The **Class Restrict** option allows you to narrow the list to people waiting for a certain type of care. For example, if you select a full day toddler classroom and click **OK**, the list will show only people waiting for a full day toddler opening at that center/location.





3 The **Loc Restriction** option can be used to see how many people are waiting for care at a particular location. The **H/H Information** option can be used to see sponsor/spouse information, phone numbers, address, etc for whoever is highlighted on the waitlist.

If you scroll to the right of the Wait List Roster Listing browser, you can see many different pieces of information linked to each waitlist record. If you need to change any of that information (e.g., a date or priority is incorrect, etc.) go to the To Change Information on an Existing Waitlist Record section of this document.

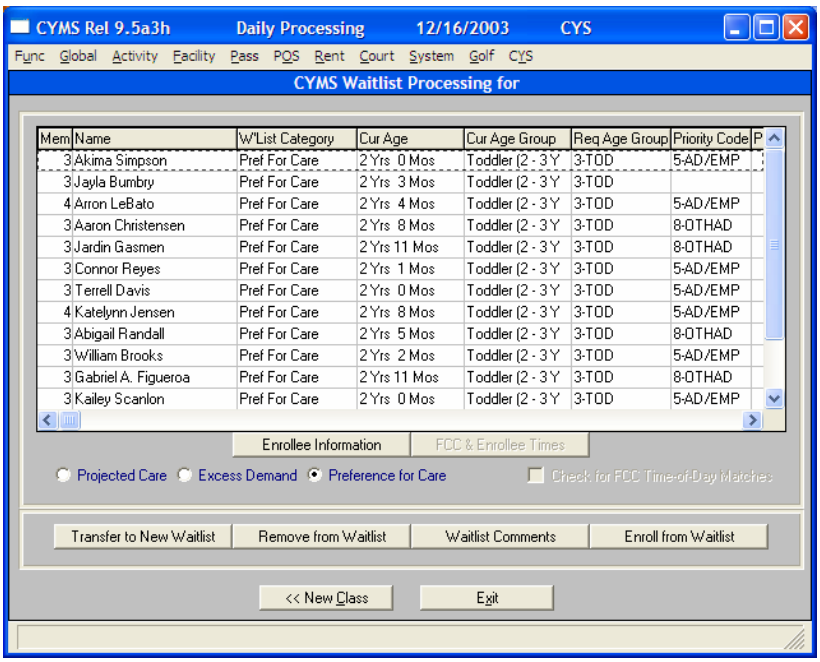
Note: The age category in the **Current Age Group** column reflects how old the child is today. The **Req. Age Group** is the type of care that was searched for in Search For Care and ultimately controls what list the child will show on when using the Class Restriction option.

Waitlist Processing

Waitlist Processing is the recommended program to use when calling parents on the waitlist to fill a space in your classroom. It can also be used to move someone from one waitlist to another or to delete someone from the waitlist.

1 Go to Daily → CYS → CYS Waitlist Processing.

2 Select an activity (typically, the one that has the opening) and click **OK**. You will then be shown a list of people waiting for that type of care.



3 Choose which list (preference, excess, or projected) you want to work with. Select the child, then click on **Enrollee Information** to show phone numbers, sponsor/spouse information, etc. You can also click **Waitlist Comments** to log who you spoke to, whether you had to leave a message with the parent, etc.

4 To delete the selected child from the waitlist, click **Remove From Waitlist**. This will remove the entire waitlist record including Waitlist Comments.

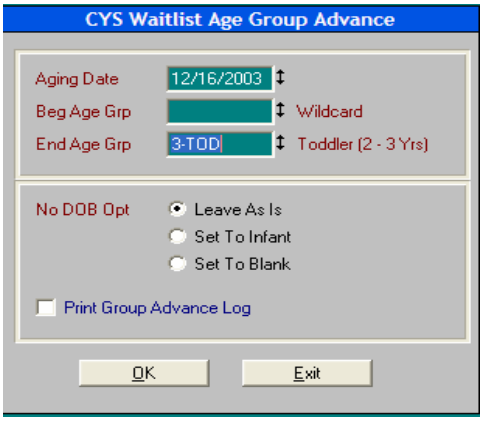
5 Click **Transfer to New Waitlist** to move the selected child from Projected to Excess or from Excess to Preference. This option would be used when Projected Care patrons have arrived and are no longer considered future care. They are now either Excess or Preference.

6 The **Enroll From Waitlist** option allows you to enroll the child directly into the program you have offered them. However, most bases require the parent to come to central registration to secure the spot before the enrollment can take place in the system.

Waitlist Age Group Advance

As ages change and infants become pre-tods and pre-tods become toddlers, etc., the Waitlist Age Group Advance will automatically shift children to waiting for care based on their current age. For example, a child comes in today and is waitlisted for infant care. Six months from now, the child is a pre-tod. Running the Waitlist Age Group Advance program will shift the child from waiting for an infant opening to waiting for a pre-tod opening.

Go to Period End → CYS → CYS Waitlist Age Group Advance.



Aging Date: Generally you will use today's date. This will shift children based on how old they are today.

Beginning/Ending Age Group: Once per week you will use <*blank*> through *Toddler*. Once per year (at the end of the school year or the beginning of the new school year) all age groups should be included.

No DOB Option: If a child doesn't have a date of birth this tells us what we should waitlist them for. As long as infant was chosen during the initial search Leave As Is should suffice.

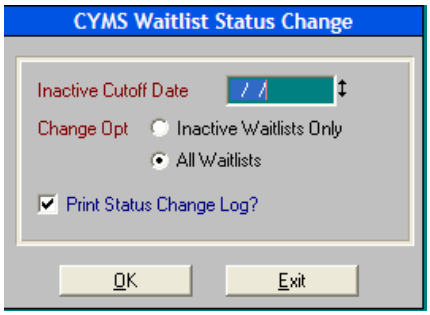
Print Group Advance Log: If selected, this will print a list of the kids who got shifted. The report will not include children that didn't move to a new age group.

HH Waitlist Status Change

This program changes people's waitlist status from Active to Inactive. It compares the **Inactive Cutoff Date** to the person's **Last Renewal Date** or, if that is absent, the **Initial Date** tied to the waitlist record. If the **Last Renewal Date** (or **Initial Date**) falls before the **Inactive Cutoff Date,** the person is made Inactive on the waitlist.

This process should be run at least once per month with an **Inactive Cutoff Date** of 3–6 months ago, depending on how often customers are required to renew their waitlist entries.

Go to Period End → CYS → CYS HH Waitlist Status Change.



Note: Do NOT use today's date as the **Inactive Cutoff Date** or everyone on the waitlist will be made Inactive.

It is recommended that you select the **All Waitlists** option and make the **Inactive Cutoff Date** three to six months ago, depending on how often customers are required to renew their waitlist entries.

The **Inactive Waitlists Only** option is only used in the case that you ran the **All Waitlists** option with today's date by mistake, causing all waitlist entries to become Inactive. When running this program for **Inactive Waitlists Only**, the system will compare the **Inactive Cutoff Date** to the waitlist record's Last Renewal Date or (if that is absent) to the Initial Date. If the Renewal Date or Initial Date is greater than the **Inactive Cutoff Date**, the record is made Active again.

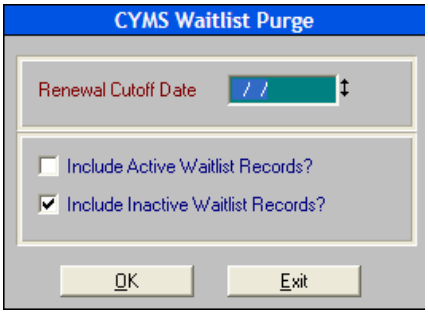
Note: Inactive waitlist records do not show in Waitlist Inquiry or in Waitlist Processing. Making someone Inactive doesn't delete comments or dates, etc. tied to their waitlist record. You can still go into Search For Care, click **HH Waitlist**, click **Change**, and see details of the entry and manually make it Active again.

HH Waitlist Purge

The Waitlist Purge program is different from the Waitlist Status Change program in that it removes the person from the waitlist as well as any waitlist comments, etc. To get a purged person back on the waitlist, you would have to re-run Search For Care.

How often you should run this process depends on how long you are required to maintain Waitlist records for Inactive entries.

Go to Period End → CYS → CYS HH Waitlist Purge.



It is recommended that you run this program with a **Renewal Cutoff Date** of at least a year ago (or more depending on your local policies) and with only the **Include Inactive Waitlist Records?** option selected.

Do **not** run this program with the current date as the **Renewal Cutoff Date**, and do not run with the **Include Active Waitlist Records?** option selected unless directed by VSI.

Note: If you purge all records (Active and Inactive) by mistake, the only way to get those records back is to restore the prior day's backup or re-enter the records through Search for Care.

HH Waitlist Delete

Go to Period End → CYS → CYS HH Waitlist Delete.

This program allows you to remove all people in a particular household from the waitlist. You can also accomplish this by using Search For Care, clicking **HH Waitlist**, and using the Delete option.

Missing HH Waitlist Purge

This program should only be run to remove Waitlist entries that have a ? in the Household or Name field.

Go to Utilities → CYS → Missing HH Waitlist Purge.

Select the **Purge CYMS Waitlist Records Without Households?** option.