CYMS TRAINING GUIDE

CTG-A08 – STAFF MODULE

Updated Apr 04

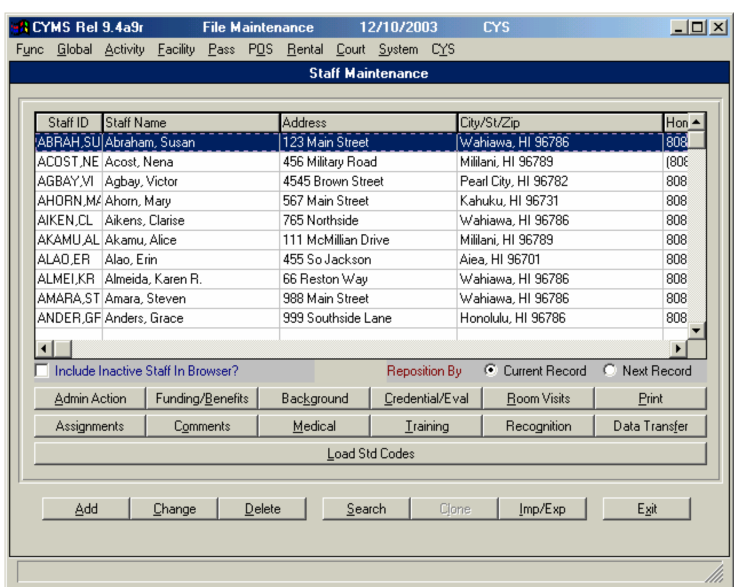
THE PROCESS:

1) This module is to be used by **Managers**, **Admin/Operations staff**, **TACS/TAPS** -- all individuals responsible for personnel actions, administrative actions, training and recognition of staff, volunteers and contractors.
2) First step = add a new record
3) Then -- complete basic information screens (during deskside orientation, if possible)
3) Regularly use the "Button Screens" for daily tracking/recordkeeping
4) Use reports for recurring and annual data requirements

HINTS:

1) Use upper and lower case capitalization for all entries – this makes data easier to read. **DO NOT** use all caps – they take up too much space.
2) Picklists can be accessed by **right-clicking in the green field** or clicking in the green field and pressing the **F9** key.
3) The easiest way to select a picklist item is to **double click** it.
4) If it looks like you have lost part of your pick list, hit the **space bar** to "refresh" the list and go back to the top.
5) Use the **Tab** key to advance to the next field instead of the mouse. If you tab too far, you can use **Shift + Tab** to go to the previous field.
6) To clear contents from a date field, use the **F8** key.
7) To get quickly to a name in the browser, **start typing** the last name. You do not have to use the scroll bars.

PATH: FILES – CYS – STAFF MODULE



1. Main Browser Screen

a. From this screen, you can **add new employees,** volunteers or contractors (see detailed instructions below). Or . . .

b. You can **work with existing staff**:

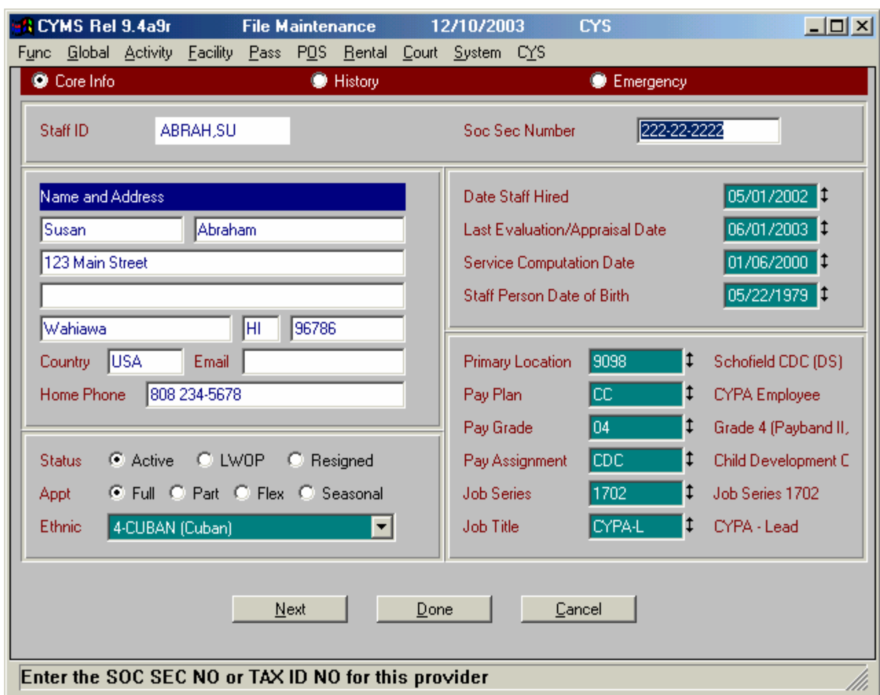
1) Highlight/double click the name to go to the **three core information screens** (or highlight the name and click the **Change** button at the bottom of the screen).

2) Highlight the name and then click one of the buttons in the middle of the screen (**Admin Action, Funding/Benefits, Comments, Background, Medical, etc**) to use the daily processing screens hiding behind these buttons.

c. If a name does not show up on the browser list, try clicking the **"Include Inactive Staff in Browser?"** button. They might have been given a "resigned" status on the first core screen.

2. Adding a New Staff Member – Core Information Screen

a. On the Main Browser Screen, click the **Add** button to get to the **Core Info** screen.



b. **Staff ID**:

1) Type the **first five letters of the last name, a comma and the first two letters of the first name** with no spaces. (e.g. Mary Smith = SMITH,MA). We want to keep the codes standard so data can be shared between installations.

2) If a last name is shorter than 5 letters, fill in all of the available 8 spaces with extra letters from the first name Karen Rowe = ROWE,KAR).

3) If you have two staff with similar first/last names, you may have to get creative (e.g. Mary Smith and Martha J. Smith = SMITH,MA and SMITH,MJ). Each staff member must have a unique code.

c. **Social Security Number:**

1) This is an optional field. If you want to keep social security numbers (SSN) in another location, that is your choice.

2) To enter a SSN, just type the numbers. You do not need to put in the dashes.

d. **Name and Address**:

1) **First name** goes in the first blank. **Last name** goes in the second (larger) blank. Do not use all caps.

2) Enter **Address, City, State, Zip, Email, Home Phone**. You can overwrite any default template information that carries into the screen.

e. **Status**: (key annual report information)

1) **Active** – Current employee
2) **LWOP** (Leave Without Pay) – Employee is not currently working, but is still on your payroll.
3) **Resigned** – This makes the individual inactive. The name will not show on the browser unless you click the "Include Inactive Staff" toggle.

f. **Appointment**: (key annual report information)

1) Choose the appropriate category: **Full Time, Part Time, Flex, Seasonal**
2) Be sure to update these fields when appointment or status changes!

g. **Ethnicity**: (key information for the Boys & Girls Club annual report)

1) Choose the closest match.
2) This list came from the 2000 U.S. Census document. It gives some common ethnic choices and then a general "other" for each category (e.g. Cuban, Mexican, Puerto Rican, Other Spanish/Hispanic/Latin)
3) Note #7 "Multi Racial/Other (Not Listed Above)" which may apply in many situations.

h. **Dates**: (administrative data for local use)

1) **Date Staff Hired** (take from personnel action)

2) **Last Evaluation/Appraisal Date** (leading to a monitoring report)
3) **Service Computation Date** (should be on CPO paperwork – when did they start working for the government)
4) **Staff Person Date of Birth** (optional field leading to a birthday report)

i. **Position**: (key annual report information)

1) **Primary Location**:
   - This field lets you limit the number of names shown in the Main Browser. It does not necessarily mean "this is the building where this person works" – it means "I want all of the people with this location to be seen in one grouping."
   - By coding a TACS/TAPS or Manager's login to match the Primary Location, we can make it so they can only see and access the files of their own staff, contractors, volunteers (anyone who has the same location identified in this field). If you have questions or need assistance call CYS or VSI.
   - Logins of overall administrative people (CYS Coordinator, Program Ops Specialist, etc) or dual-hatted individuals are usually not restricted by Primary Location. These people can see all staff files.

2) **Pay Plan**: Choose the appropriate listing (**CC, GS, WG, etc**) – this should match the personnel action.

3) **Pay Grade**:
   - In conjunction with the Pay Plan, choose the appropriate pay grade (**01-13**).
   - Be careful with your CC employees – <u>Payband I is a grade 02 or 03</u> equivalent; <u>Payband II is a grade 04 or 05</u> equivalent!

4) **Pay Assignment**: What CYS program does this person work for? (**CDC, SAS. etc**)

5) **Job Series**: Choose the appropriate listing – this should match the personnel action (**1701, 1702, etc**). If the job series you need is not on the list, see your CYS Super User to get that series added to the list.

6) **Job Title**:
   - Select the title closest to the actual function.
   - Start typing codes to narrow down the browser list. (e.g. To find a **director**, type in the letter D; **assistant directors** are under DA; for **volunteers**, type in V; for **contractors**, type in CO; for **CYPAs**, type in CY, for **specialists**, type S, **etc**).

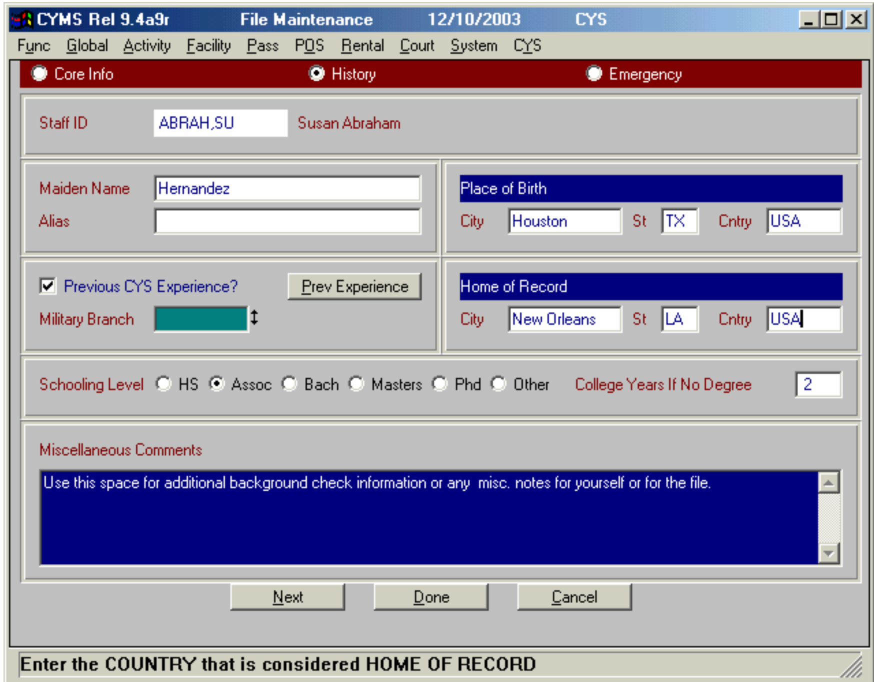
7) Click the **Next** button to go to the next screen.

3. Adding a New Staff Member – History Screen

a. **Background Checks**

1) This screen provides space to gather common information for conducting background checks (**Maiden Name, Alias, Place of Birth, Home of Record,**

Military Branch). Complete any appropriate fields. Use the blue **Miscellaneous comments** box to log any additional notes or background check data.



2) If the Civilian Personnel Office (CPO) initiates staff background checks, you do not need to use these fields for staff in CYMS. They may help gather volunteer info.

b. **Previous Experience**

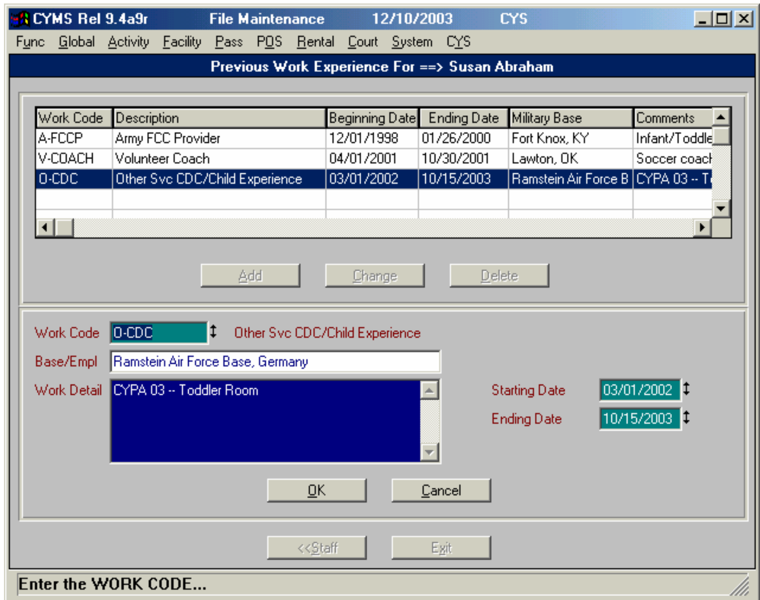
1) The history screen also provides space to collect information on previous work or volunteer experience.

2) If this person has previous experience working with **military child development or youth programs (Army, Navy, Air Force, Marine Corps)** where they may have already received some standard Department of Defense training, click the box marked "**Previous CYS Experience.**" The checks will be tallied for your annual report.

3) There is also a **Previous Experience** button. If you click this button, a new screen appears (see screen shot below) where you can enter information about previous jobs or volunteer experience. This is not intended to be a complete resume – it is just a place to log previous directly related experience and any other information managers and TACS/TAPS may find helpful in working with this individual.

- To enter **new experience**, click the **Add** button. Your cursor will move to the lower part of the screen.
- **Right-click** in the green **Work Code** field and select the appropriate code.
- Enter the **military base or employer** (if civilian) in the white box.
- Enter the **employment date range** in the fields on the right. (Right click in the green date fields to make a calendar appear or type in the dates).

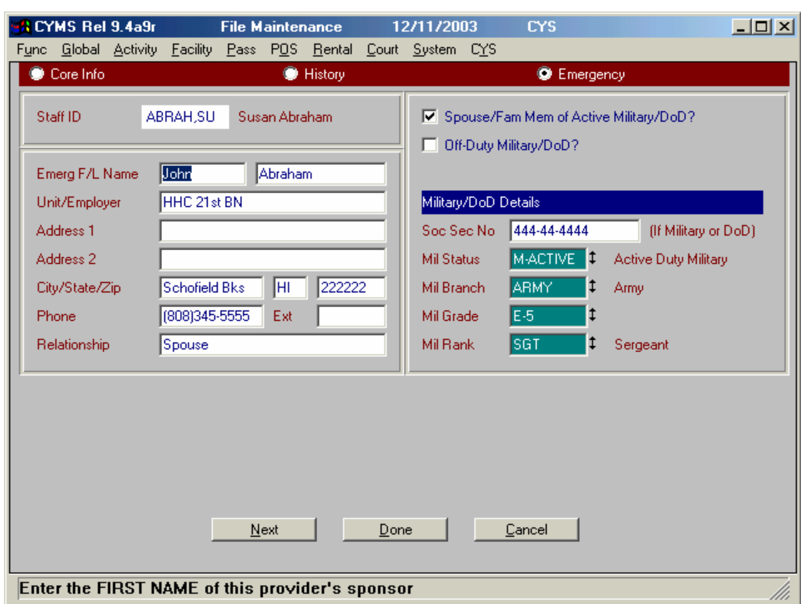
- Use the blue **Work Detail** box to record any additional information.
- When you are finished, click **OK** to move the data up into the browser box.
- To change experience already in the browser box, highlight the experience and double click or click the **Change** button.



- When you are finished adding experience, click the **<<Staff** button to return to the History screen and continue working on this staff member's file.
- Careful -- the **Exit** button will take you all of the way out of this file and put you back on the main browser screen.

c. If you are finished with this screen, click the **Next** button.

4. Adding a New Staff Member – Emergency Screen



a. The left side of this screen stores the staff member's **emergency contact information**. Who do they want you to notify if they become ill or injured on the job? This could be a spouse, relative, neighbor, etc.

b. The right side of the screen tracks whether the staff member has any **military affiliation:**

   1) If the individual is the **spouse or family member of an <u>active duty military</u> or a <u>Department of Defense (DoD) Civilian</u>**, click the little white box to add a check mark. This data will be tallied on your annual report.

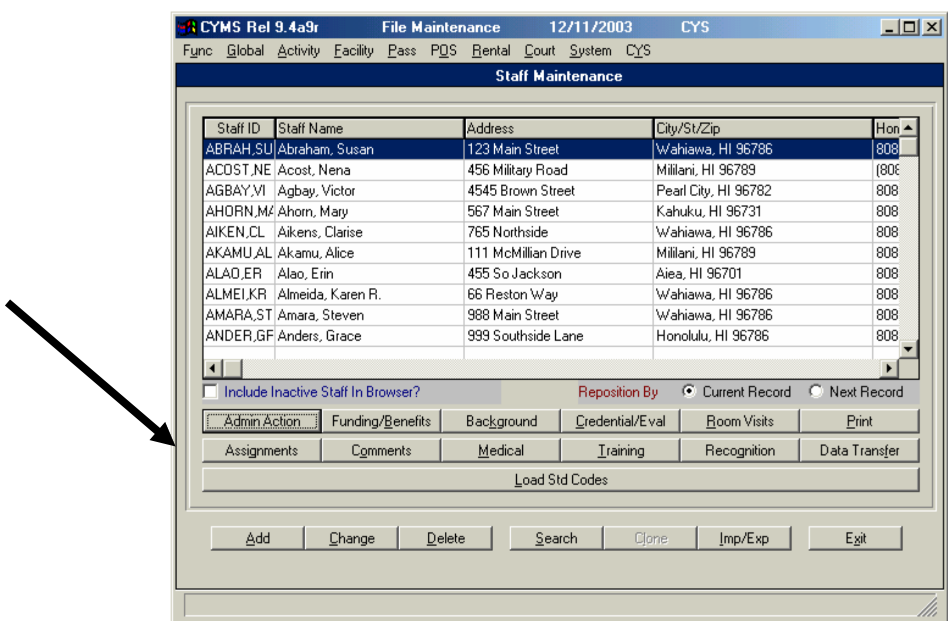
   2) If the individual is an **off-duty military or DOD civilian**, click the appropriate box. (This is often the case with volunteers, coaches, contractors, part-time employees). This information will also be tallied on the annual report.

   3) If either of these military affiliation boxes is checked, you must complete the **Military/DOD Details** section. Select the appropriate information from the pick lists on **Military Status, Military Branch, Military Grade and Military Rank**.

c. You are now finished with the Core Information screens. If you click **Next** or **Done**, you will be taken to the Main Browser screen where you can start using the buttons for maintaining other administrative and tracking functions related to this individual.

5. General Comments on the Staff Button Screens

a. All of the buttons in the middle of the Main Browser screen lead to an administrative function related to the highlighted staff, volunteer or contractor.



b. All of these button screens work basically the same way:

1) **Highlight** the staff, volunteer or contractor.

2) **Click** on the appropriate button.

3) When the screen appears, click the **Add** button to enter **new information**.

4) If you want to **change or update existing information**, highlight what you want to access and double click it (or click the **Change** button)

5) Right click in any **green code boxes**. Select the appropriate item from the picklist by double clicking it.

6) Right click in any **green date boxes** to bring up a calendar – or just type in a date.

7) Use the **blue boxes** to enter any additional details or comments. Use discrection.

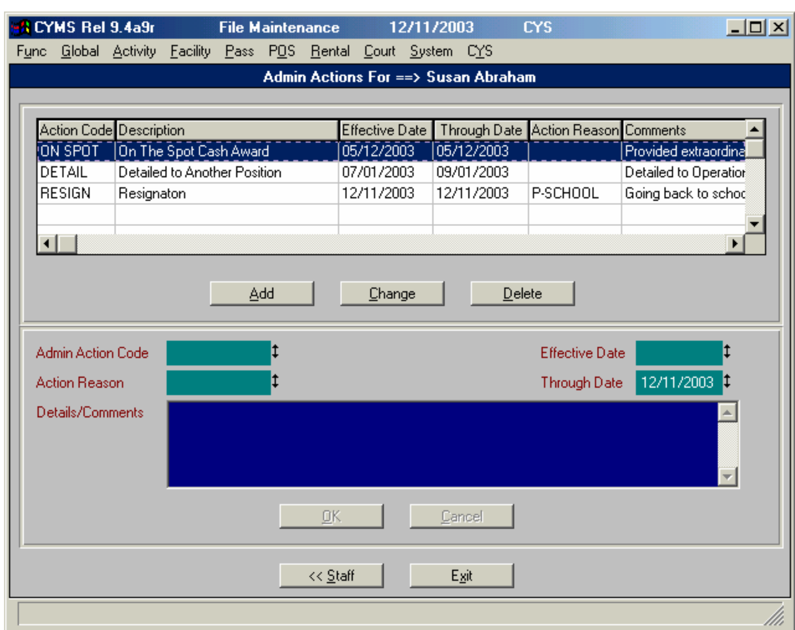
8) When you are finished, click **OK** to move the data back up to the browser box.

9) When you are finished with the screen, click the **<<Staff** button to return to the previous screen.

10) Note, the **Exit** button takes you all of the way out of the staff module and puts you on the main CYMS menu screen. Oops!

6. Staff Button Screens – Admin Actions

a. **Highlight** the staff member's name and click the **Admin Action** button – you will be taken to the screen shown below.



b. Use this screen to record all pertinent administrative actions for this individual. This information (especially the reasons for resignation data) will eventually be tallied into a turnover report for submission to higher headquarters.

c. **Admin actions** include things like:

- Merit Increases
- On the Spot Cash Awards
- Time Off Awards

- Details
- Leave Without Pay
- Extended Sick Leave
- Employee Injury/Accident
- Resignation

d. When an employee **resigns (or is terminated)** you must provide a standardized reason for this action. Select these reasons from the appropriate pick list. This data will be consolidated into an employee turnover report.

e. The **reasons for action** include administrative reasons (starting with the letter A-) and personal reasons (starting with P-) including such things as:

- A-BGCHEK No Satisfactory Background Check
- A-DISCRM Failed – Non-Discriminatory Service
- A-TRNG Failed – Complete Training Rqmts

- P-HEALTH Health Reasons
- P-HOURS Hours/Schedule Not Satisfactory
- P-JOBOTH Taking a Job Outside CYS
- P-MATERN Maternity Leave
- P-WRONG Not the Right Job for Me

7. Staff Button Screens – Assignments

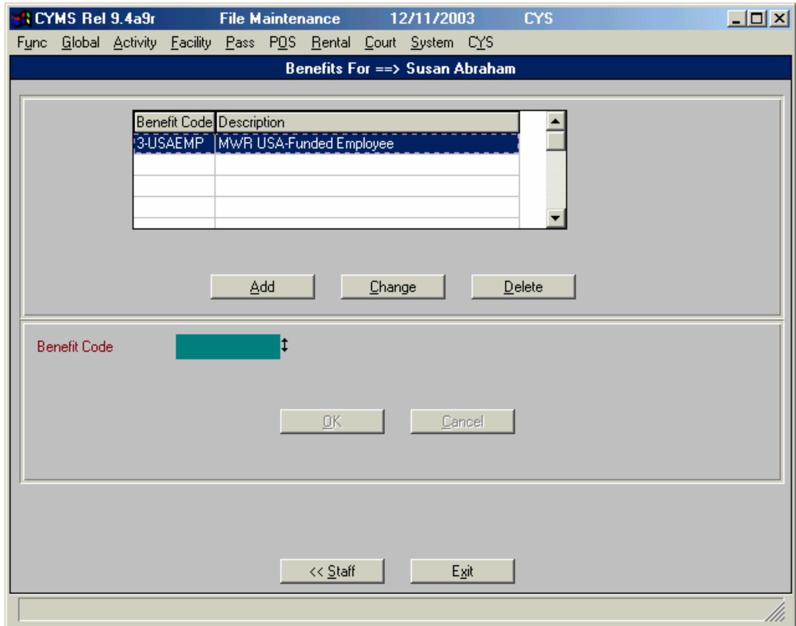
Not used at this time.

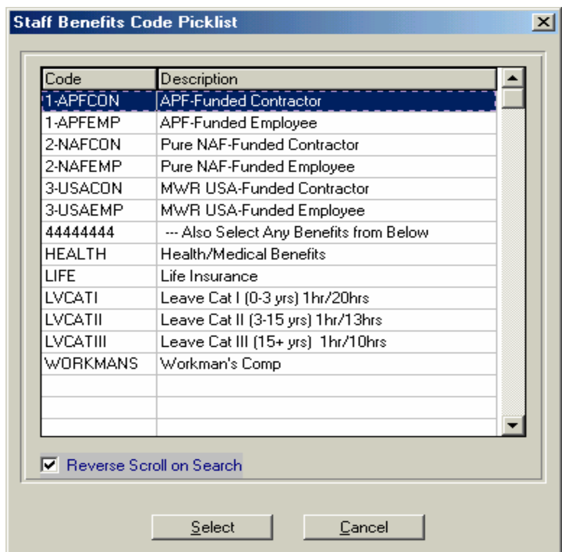
8. Staff Button Screens – Funding/Benefits

a. The **"funding**" part of this pick list provides critical information for the annual report: How many **APF, NAF, MWR USA** employees and contractors!

b. Be sure to complete this screen and **keep it current** for every staff member when changes/promotions occur.

c. The **"benefits"** part of the list is optional administrative information.



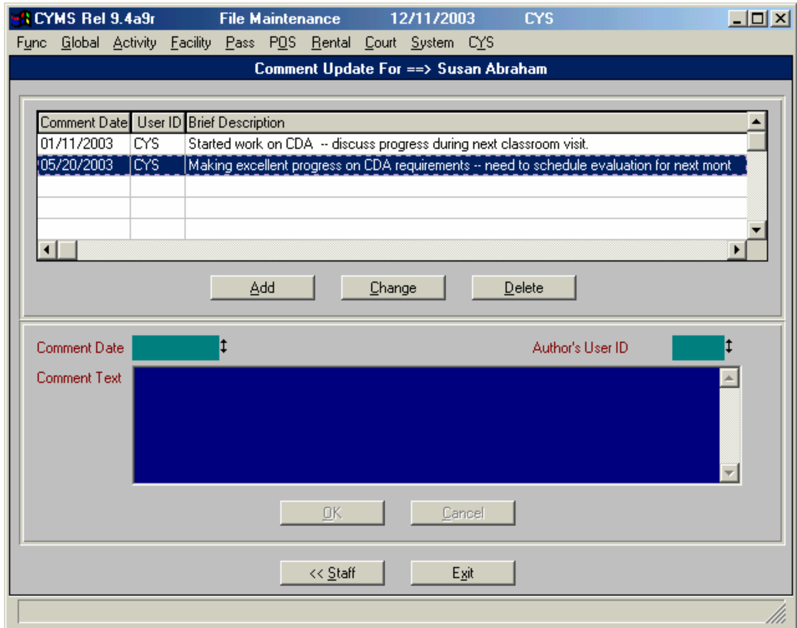


9. Staff Button Screens – Comments

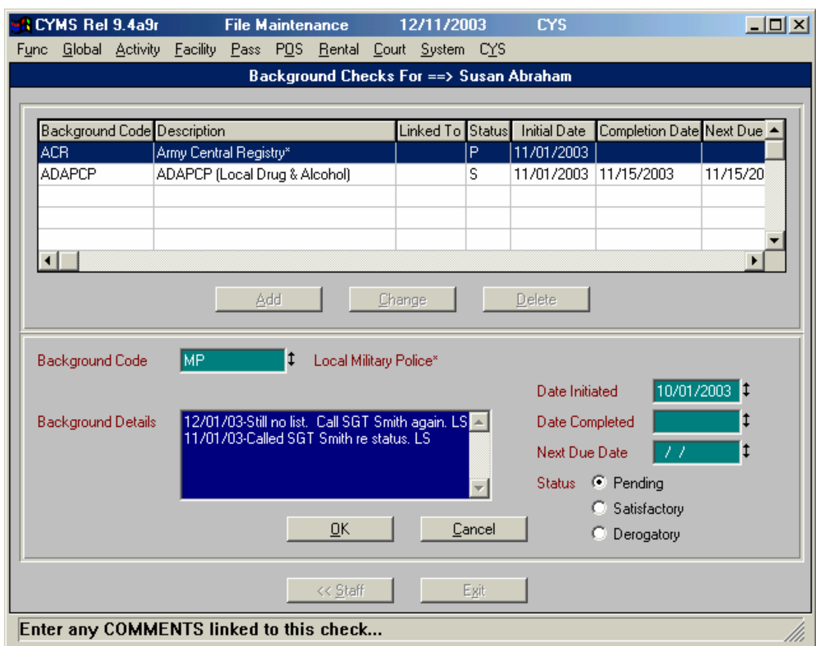
a. The Comments screen gives **open space for any general comments** (kind of like a sticky note). See screen shot below.

b. Comments can be logged and reviewed by authorized managers, admin staff and TACS/TAPS.

c. Information from Word or other text programs can be copied and pasted into the blue comments boxes. (**Control C** <u>copies</u> data; **Control V** <u>pastes</u> it)



10. Staff Button Screens – Background Checks



a. When you **initiate** a background check:
- Click the Add button.
- Select the appropriate check.
- Enter the date initiated.
- Change the Status to Pending.
- Then click the OK button to move the data up to the browser.

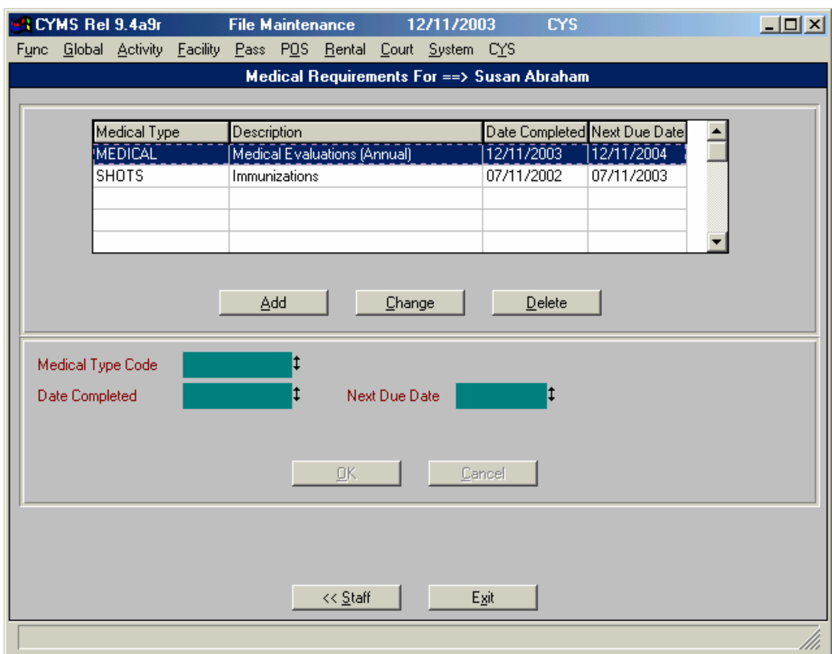
b. Use the blue box to record **details and notes about tracking** the report:
- When did you call or write?
- Who did you talk to?

- What did they promise? Etc.
- It is a good idea to include the name or initials of the person making the inquiry.
- We suggest putting the most recent comments at the top of the blue box
- Be sure to change the status back to Pending (it defaults back to Satisfactory).

c. When the check is **completed**:
- Enter the **Completed Date** (we will eventually be able to run a report showing how long it took to complete the different reports)
- If applicable, enter the **Next Due Date** (this enables you to run a report for checks coming due or overdue)
- Change the status to **Satisfactory**

d. If CPO is completing background checks prior to employment, we suggest you log the completion dates and next due dates so you have a system to remind CPO when they come due again.

11. Staff Button Screens – Medical Requirements

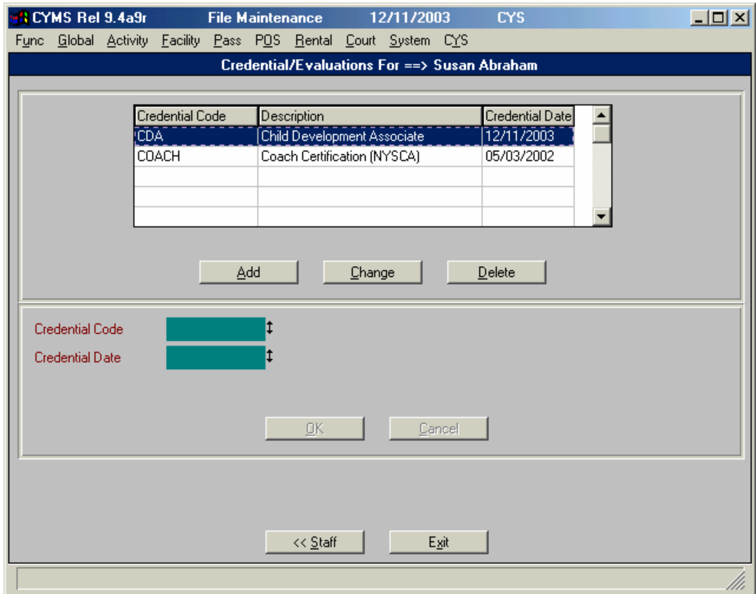


a. Use this screen to track **physicals, immunizations, TB-Tine requirements, etc**.

b. The template list is very global – if you need to add more specific requirements (new shot requirements or other health-related issues), contact your CYMS Super User.

c. By entering a **Next Due Date**, you gain the ability to track what is coming due or what is overdue.

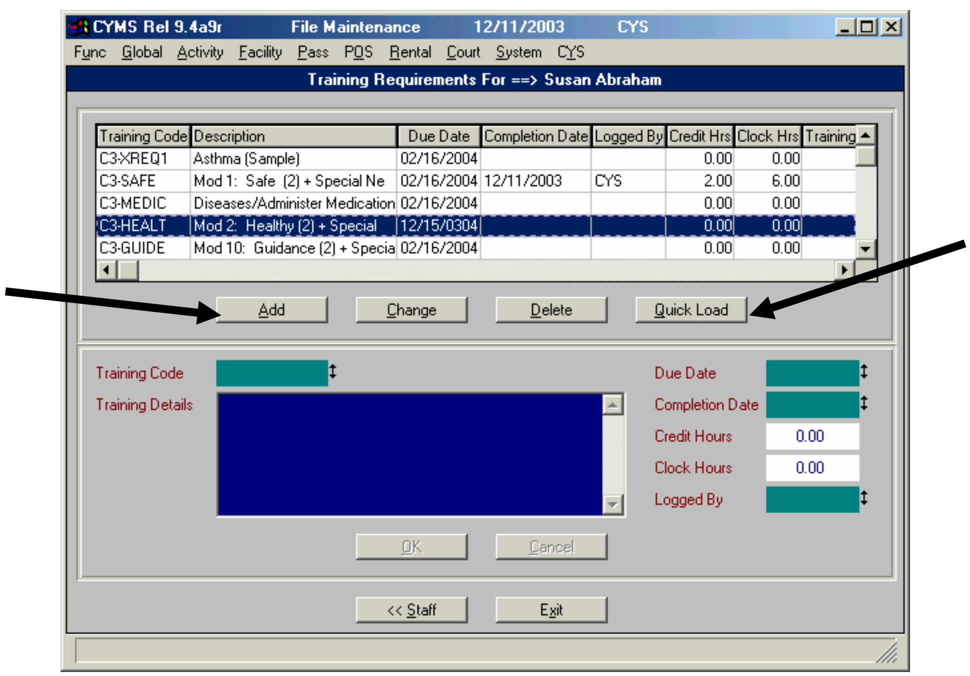
12. Staff Button Screens – Credentials/Evaluations



a. Use this screen to track credentials earned by employees.

b. The picklist includes things such as:
   - Child Development Associate
   - CDA Representative
   - Military School-Age Credential
   - NSACA Validator
   - SFA/CPR Instructor
   - Sports Academy Credential

13. Staff Button Screens – Training



a. The picklist on this screen contains all of the **major training plans**. You can /narrow the list down by typing in the first letter of the plan you want to work with:
   - ***A – Annual Plan***
   - ***C – Caregiving***
   - ***F – Sports and Fitness***
   - ***M - Management***
   - ***S – School Age***
   - ***T – Middle-School Teen***
   - Note: The **FCC training plan is in the FCC module**. It uses a slightly different coding system (numbers instead of letters).

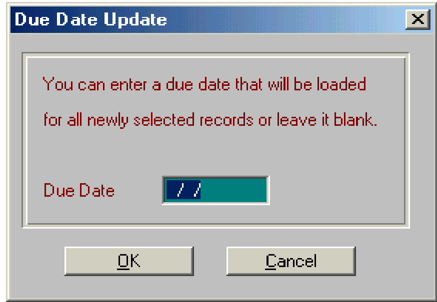
b. The **lists for the foundation training** can be further narrowed by adding a number code along with the letter code. We'll use caregiving as our example (you can substitute an **F, S** or **T** for the ***C*** for the other plans):
   - ***C1 = Orientation***
   - ***C2 = Work Experience***
   - ***C3 = Entry Level***
   - ***C4 = Skill Level***
   - ***C5 = Target Level***
   - ***C6 = Foundation Training Complete***

c. When you **are meeting with an employee to initiate/**review the training plan and progress, you can jointly discuss and enter/update the requirements. This can be done in your office (at a convenient time for the employee) – or in the classroom using a laptop (contact us for specific instructions on importing and exporting staff data onto laptops). The key is doing this process "with" the employee and **using it as a training/guidance session**. This should not be a "dark of night" paperwork drill for a TACS/TAPS. **Pilot installations** will be identified for using, testing and perfecting this process.

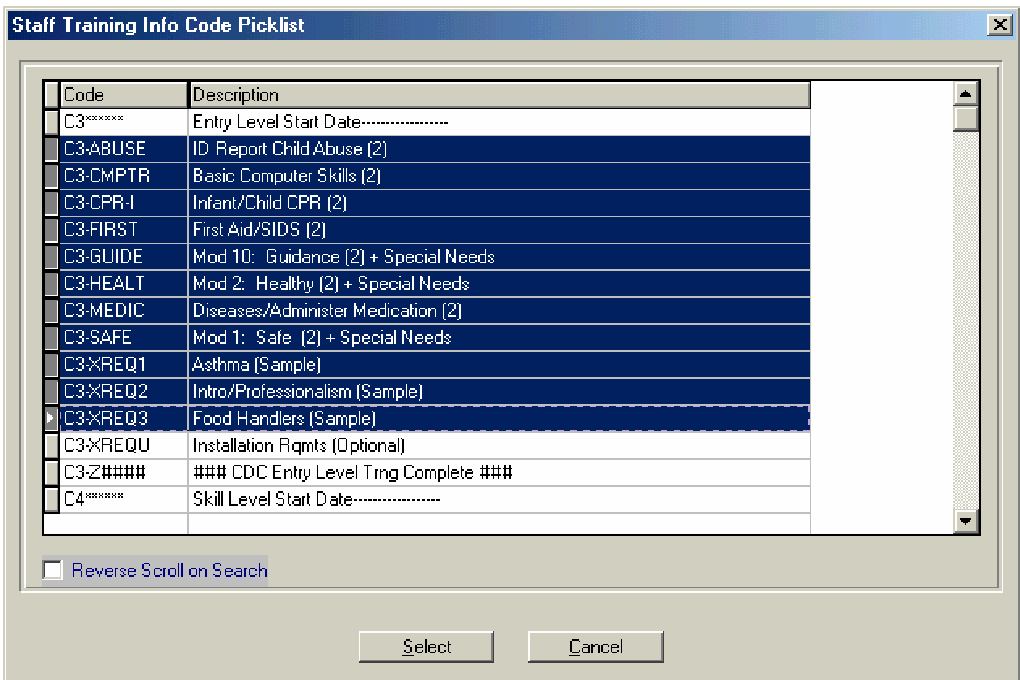
d. **To establish a training plan** (we will use **C3 – Entry Level** as our example):

   1) You and the employee agree on the date the **employee officially starts** this plan.
      - Click the $\boxed{\text{Add}}$ button
      - Type in ***C3*** to get to the caregiving entry level listing
      - Highlight and double click ***C3********* **Entry Level Start Date**
      - You will want to **anchor** start date you just agreed upon – to do this, you put that **same date** in both the **Due Date** and the **Completion D**ate fields. (We know this sounds a little crazy, just trust us on this one – it will make more sense when you see how this prints out on your reports).
      - Click $\boxed{\text{OK}}$ to move the entry up into the browser box. You have now told the computer that the TACS and the employee agreed on a start date for this level.

   2) The next step is for you both to **agree on a completion date** – when should all of the requirements for this level be completed?
      - When you have this date (example 6 months from now), click the $\boxed{\text{Quick Load}}$ button and a little box will appear asking you for this date:



3) When you enter the date and click **OK**, you are taken back to the master pick list – only this time you have the ability to multi-select requirements by using the little gray boxes at the far left.



- Type in the letter and number code you are working with (in our example, **C3**)

- Highlight all of the requirements that must be completed by the date you entered. You can **click and drag in the gray boxes** at the left – or you can hold down the **Control Key and select** isolated items.

- Note the codes near the bottom of the C3 list (the ones coded **C3-XREQ1, C3-XREQ2, C3X-REQ3, etc**) – these are codes that can be used for **local requirements** in conjunction with this level. The samples we have used (borrowed from one installation) are Asthma, Introduction to Professionalism and Food Handlers. I have also seen things like Blood-Borne Pathogens, TIPOSH, Stress Management for Deployment. Your CYMS Super User can assist you in adapting these installation codes to your local requirements.

- The last code **C3-XREQU** is an **open-ended code**. It is not front loaded. It is added on demand when an employee does something outside of the normal scope (e.g. takes a college course, etc). See additional information on this below.

- When all are highlighted, click **OK** – all of the codes move up to the browser box with the due date you selected. This now gives you the ability to use reports to monitor when things are coming due and when things are overdue.

- If you want to give the employee a **copy of the plan** you both just agreed upon or make a file copy, exit out of the staff module. Go to **Reports – CYS –CDC Reports – Staff Training Report** and print out a copy of the IDP.

4) To **update the training plan**:

- Highlight the item you want to change or update.

- In the blue box, you can:
  - **Shorten or extend the due date** for any item
  - **Add notes** to explain why you did this (employee needs a more structured plan, mandatory attendance at upcoming class, maternity leave, emergency leave, etc)
  - Log your **notes/comments/reminders on employee progress** in completing this requirement
  - Log **employee comments/concerns/requests** made during your reviews
  - Log **scores, competencies** and other data

- When an item is completed, enter a **Completion Date** – the default **Credit Hours** and **Clock Hours** should fill in (unfortunately, this feature is broken in Version 9.4 and these hours must be entered manually – it will be functional again in Version 9.5). On the IDP printout (Staff Training Report), these hours are totaled by category (Entry, Skill, Target, etc).

- If you use the **C3-XREQU** code for a **non-standard one-time requirement** for this employee, the description of the action is put into the blue box when the code is loaded. **Due Date and Completion Date** can be the same date – or they can be different. **Credit and clock hours** must be assigned and entered. This code can be used more than once with different descriptions in the blue box.

5) When an employee **finishes a level**:

- When all of the requirements have completion dates, click the **Add** button. Type in the level code (C3 in our example) and go down to the **last code (C3-Z#### ###CDC Entry Level Trng Complete ###)**. By entering this code and making the **Due Date and Completion Date** the same date, you are officially telling the computer that the employee has finished this level of training.

- Go ahead and celebrate this accomplishment – *but what happens next* – something else is now due (in our example, the Target Level training). So you go back to the top of the instructions (#13d above):
  - Add the Target Level start date (with both the Due Date and Completion Date reflecting the agreed-upon date to start this new level)
  - Agree upon the date when all of the requirements for this level need to be completed.
  - Quick load the date and the requirements – and you are off and running on the next training level.
  - Start monitoring the progress.

6) When an employee finishes their foundation training, load the **C6-Z####** code and then load the **annual training**.

   - The annual training is patterned somewhat after the local requirements code
     - There are some items that are mandatory and have a set date (first aid renewal, food handlers, etc) – these can be loaded up front with appropriate due dates.
     - Other things are loaded as they are completed (readings, workshops, etc)
     - Any of these open-ended things can be given a due date when TACS/TAPS and employee agree upon a requirement time frame.

   - The **A6** code can be used to list common recurring installation requirements (Customer Service Training, Consideration of Others, Fire Update, etc). These codes can be added by the CYMS Super User to save typing time. They are loaded on demand, as needed as part of an employee's annual plan.

   - There is also an **A6-XREQU** code (totally open ended) for use in logging one-time unique requirements. The description of the requirement should be typed into the blue box. Credit and clock hours are locally assigned.

   - Each level (A1-Workshops, A2-Readings/Videos, A3-Observations, etc) has a completion block that can be loaded when the full requirement is met.

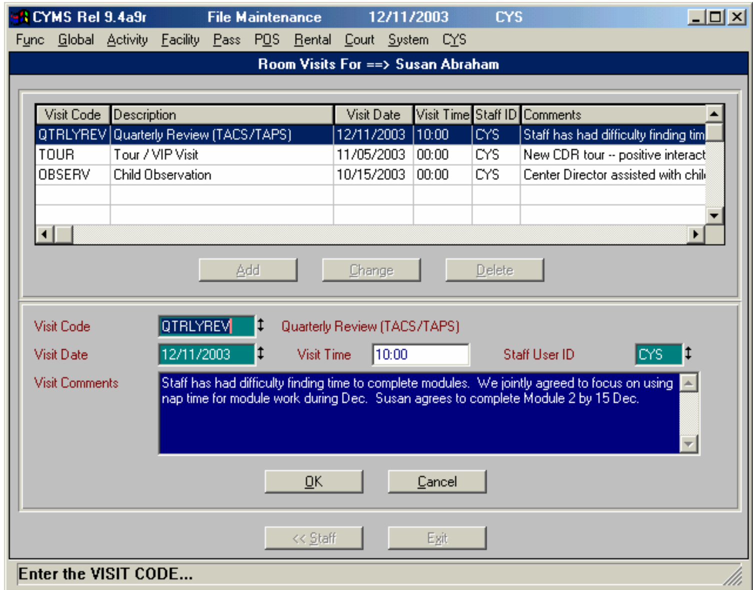
   - When the entire annual plan has been completed, enter the appropriate A7 code, print out a copy of the IDP (Staff Training Report) – and then delete or re-use the same codes to build the next year's annual plan.

7) The **Management Plan** is patterned after the annual plan with both structured and open-ended requirements.

14. Staff Button Screens – Room Visits

a. Use this screen to log any type of interaction with an employee – routine classroom visits, Quarterly TACS/TAPS review, CDA visits, Child Observations, etc.

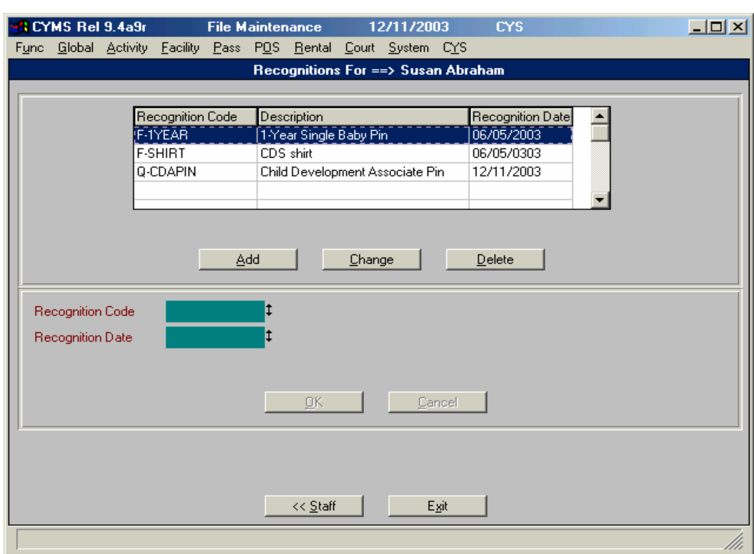
b. Complete the following blocks:



1) **Work code** = the type of visit
2) **Visit date**
3) **Visit time** (unfortunately, this just gives the start time – to track duration of visit, make an entry in the blue box)
4) **Staff user ID** (this defaults to the person making the entry)
5) **Visit Comments** (blue box)
   - Record your notes/observations
   - Record employee comments/concerns
   - You can cut paste in text from other documents or summarize your key points

c. **Reports** can be run showing all visits or certain types of visits. (Go to **Reports – CYS – CDC Reports – Staff Room Visit Report**)

15. Staff Button Screens – Recognition



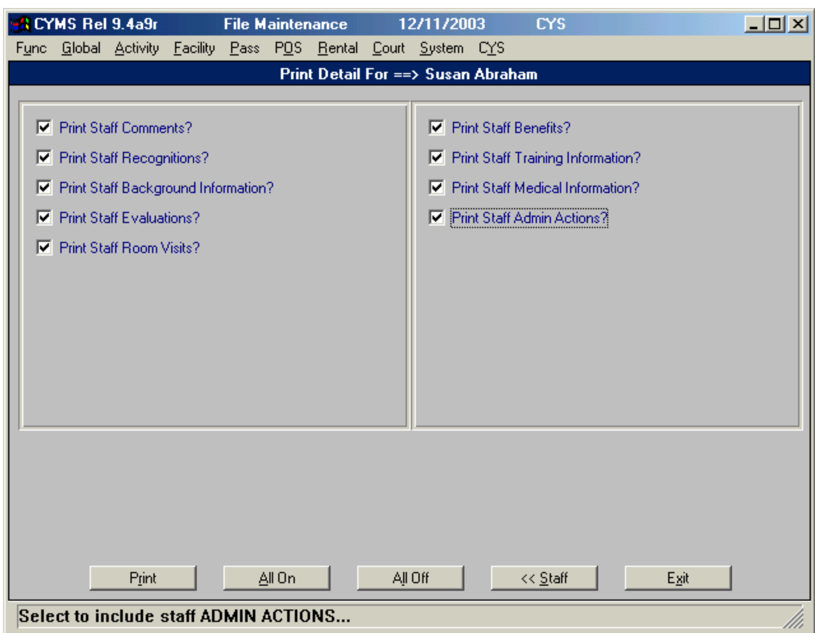
a. Use this screen to log both **Army and local recognition** for employees, volunteers and contractors:

1) The **Army CDS recognition plan** is pre-loaded into the pick list.

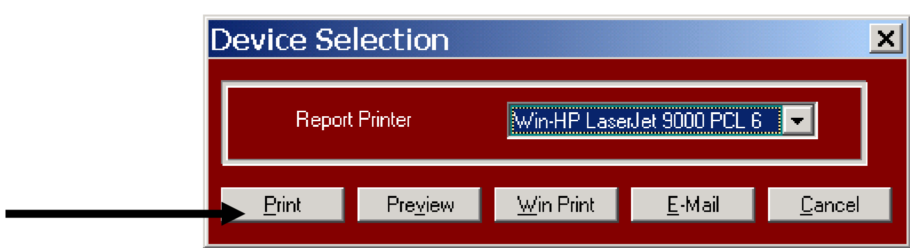
2) It is also possible for installations to add **local recognition items** to the list (our example is a CDS shirt given at the one year mark)
   - We also suggest using codes toward the end of the list for local recognition – your CYMS Super User can assist you in adding these codes. It is critical to keep the codes uniform.
   - Use **V- codes** for volunteer recognition (e.g. V-CERTIF for a volunteer certificate; V-PIN for a volunteer pin).
   - Use **X- codes** for local recognition (e.g. X-COIN for Commander's coin; X-EMPQTR for Employee of the Quarter, etc)

b. The items entered in this screen print out as part of the employee file.

16. Admin Functions – Print File

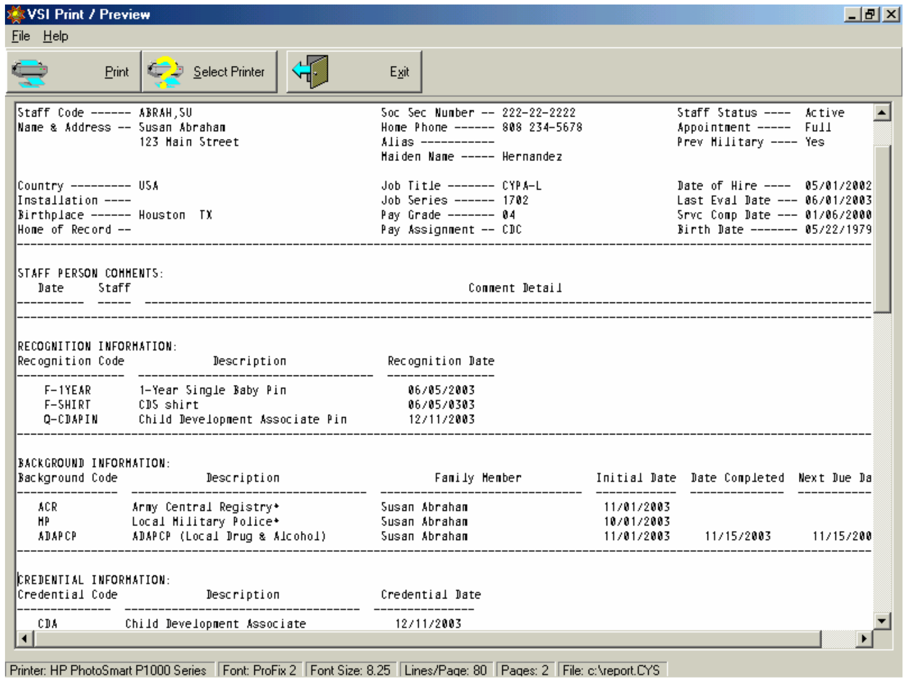


a. The last button on the top row of the Main Browser screen allows you to print all of part of the information you placed in the employee's file. Click on or off appropriate toggles.



b. You can **print**, **preview** or even **email** this report depending on which button you click.

c. To get a good clean on-screen preview of the report, chose one of the **WIN printers** in the blue box picklist. A partial copy of an employee file printout is shown below.



17. Admin Functions – Data Transfer

This feature is not working properly at this time. This will eventually allow easy data transfer of **all or part of a single employee file** between installations – or back and forth to a laptop to be able to update data on site in a classroom or FCC home. Look for this enhancement in one of the CYMS Version 9.5 releases.

18. Admin Functions – Import/Export

This feature is also not working the way we would like it to work at this time. Right now, this export feature takes **all of the Staff files** and **all of the Family Child Care provider** files at the same time and saves them on a disk or drive outside of CYMS. This is great for a "moment in time" system backup – but does not help us in being able to move data back and forth between laptops or PDA's and the main database. With the staff and the FCC being linked together, this could create some major problems in moving data. **So do not use this feature!** We will hopefully get this problem resolved before we start fielding the new CYMS Version 9.5.

19. Reports

PATH: **REPORTS – CYS – CYS CDC REPORTS**

a. All reports in CYMS work basically the same way:

1) **Range and Browser/Browser**: Depending on the toggles you select, you can choose a running "range" of data, single data items or (using the Control key and clicking in the gray boxes) random isolated items. Browsers include things such as people's names, locations, types of training, types of visits, etc.

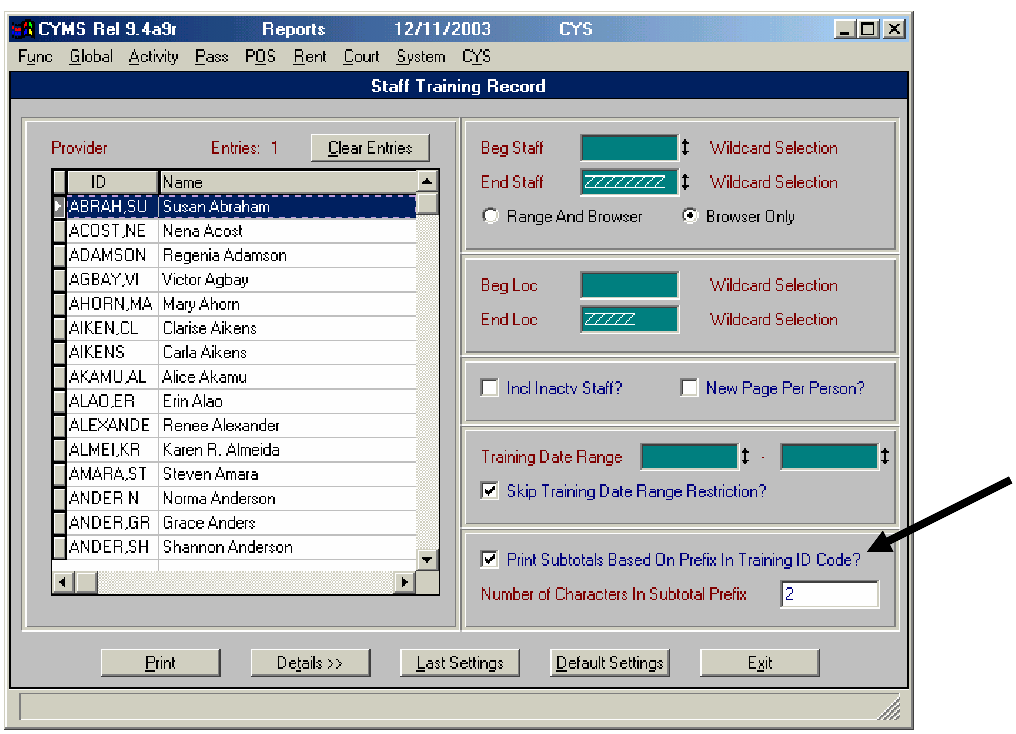
2) **Date Range**: Most reports can be narrowed down with a date range. By playing with the dates, you can see what happened during a certain time period, what is past due, or what is coming due.

3) **Skip and Include Boxes**: Some reports have green boxes where (by using the Add and Delete buttons) you can decide whether to include just one item to report on or all or several items. You can decide the scope of the report.

4) **Details**: If there is a Details>> button at the bottom of the screen, this means there is a second screen giving you more custom choices for designing the report.

5) **Toggles**: Many reports give you choices (with little check boxes or circles) to include or exclude certain data from the report. You can make a report very detailed – or very simple depending on what toggles you activate. You need to experiment with these to get just the report you want.

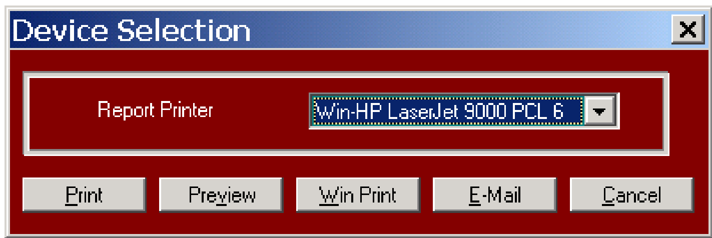
6) **Special Setup**: In the **Staff Training Report (the equivalent of the IDP),** there is a special setup that lets CYMS sub-total the Credit Hours and Clock Hours by training level:
   - Toggle the "**Print Subtotals Based On Prefix in Training ID Code**" on
   - Put the number **2** in the white box for "**Number of Characters In Subtotal Prefix**"



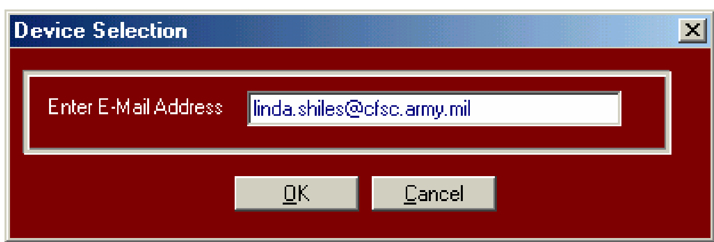
7) **Help**: Pressing the F1 key in any report gives you a help screen that explains the different fields in the report. Many help screens have a button you can click to see a sample of the report.

8) **Default Settings**: If a report is not giving you predictable results, it is a good idea to click the Default Settings button. This restores all of the toggles back to their original state – then you can start playing with them again! This is like a reset button.

9) **Preview**: To preview a report on screen, you can click the Preview button. To better view a report on screen, select one of the WIN printers from the blue picklist.



10) **Email**: You can also email reports by selecting the email option on the Device Selection screen. If you have your Outlook email open on the computer you are working on, just type the email address in the white box and click the OK button. If you get a messaging saying "text exceeds body size" – send me an email – I can send you easy instructions for setting up your reports as attachments to emails.



11) The reports module is a growing thing. As you use the reports, you discover what needs to be added or changed in the reports to make them more user friendly and functional. PLEASE, contact us immediately (by email or phone) if you have any suggestions for improving existing reports or adding new reports. There is lots of work to be done in this arena – we critically need your help.

b. The following reports can be used to monitor daily operations related to the staff module:

- ***Background Check Report*** – who is due or overdue for background checks.
- ***Staff Certification Report*** – (not valid for staff; needs to be removed)

- **Staff Listing** – names, addresses, SSN – this report definitely needs some additional sorting and data ability!

- **Staff Training Report** – this is the equivalent of the IDP. It is usually run for one staff member at a time – but it does give the ability to print out all IDPs for a specified location (CDC#1 for example). You can specify training during a specific date range – or click a toggle to skip the date restriction and view the entire training plan. See note #6 above about having this report sub-total the credit hours and classroom hours.

- **Staff Room Visit Report** – you can run this for one staff or all staff – and for one type of visit or all types of visits. It needs the ability to be run by who conducted the visit (we're working on that one).

- **Staff Training Due Report** – you can run this for one staff or all staff – for one location (CDC #1, CDC#2) or all locations – for one training requirement (Module 1, Administering Medications, etc) or for all or isolated requirements. There is a date range so you can narrow down what was done, what is overdue, what is coming due.