CYMS TRAINING GUIDE

CTG-A09a – FCC PROVIDER SETUP

Updated Apr 04

THE PROCESS:

1) This module is to be used by **FCC Directors**, **Admin/Operations/USDA staff**, **FCC TACS** -- all individuals responsible for monitoring Family Child Care provider files, administrative actions, subsidies, food program reimbursements, training and recognition.

2) Adding a **new FCC applicant**:
   a. Complete the **3 basic information screens** (Core Information, History, Family -- during deskside orientation, if possible)
   b. Use the **Certification button** to track the **steps leading to certification** (Application Received, Registered Provider, RIMP Notice Sent/Received, Provisional Certification) and beyond
   c. Use other button screens and reports to track **specific requirements leading to certification** (Background Checks, Operational Requirements, Inspections, Medical, Pets, etc)

3) When a **provider becomes certified**, you must set them up like a "mini-CDC" in CYMS so they can receive referrals from Central Registration and have children enrolled in their homes:
   a. Set the provider up as a **facility**
   b. Set the provider up as an **activity**
   c. Complete the **"Magic C"** to link all of these things together and identify **Program Types, Days & Hours, Special Requirements and Age Groups**.
   d. Identify **backup providers**

3) Regularly use all of the **"Button Screens"** for **daily tracking/recordkeeping** (Admin Actions, Subsidies, Endorsements, Inspections, Home Visits, Recognition, etc)

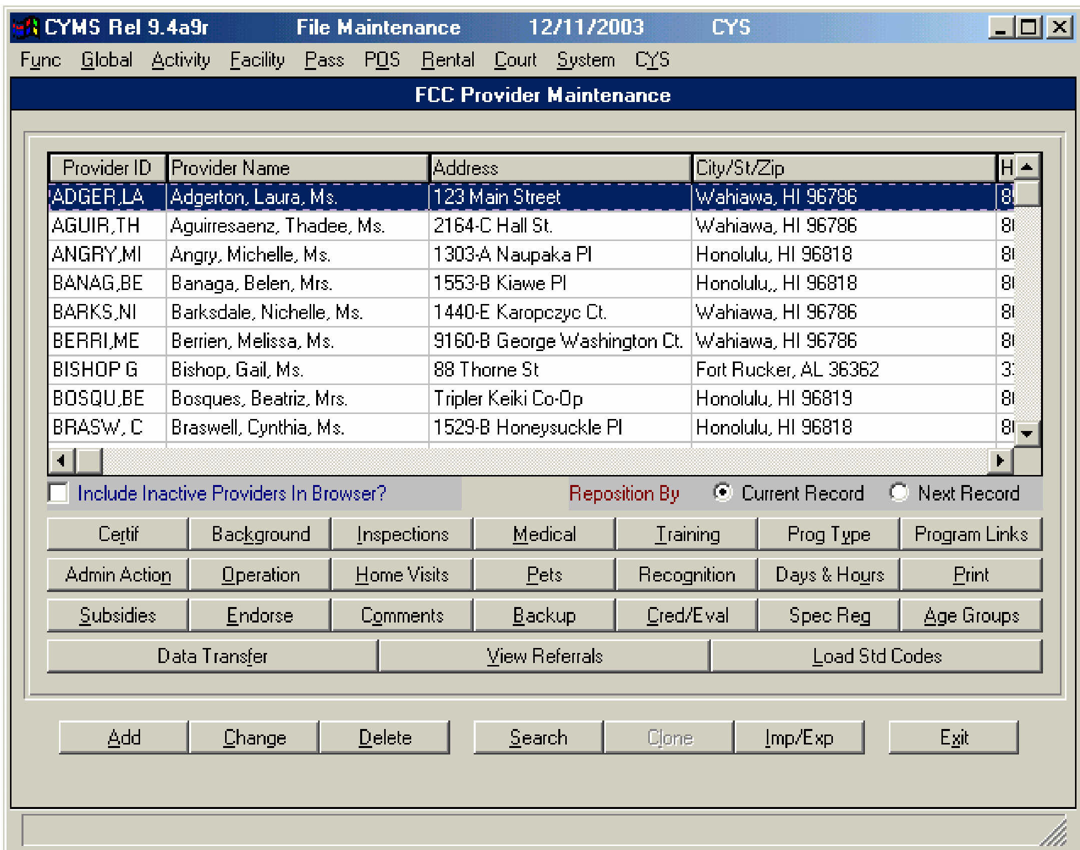
4) Use **reports** for **recurring and annual data requirements**

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 contests 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 – FCC MODULE**



1. Main Browser Screen

a. From this screen, you can **add new providers** (see detailed instructions below). Or . . .

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

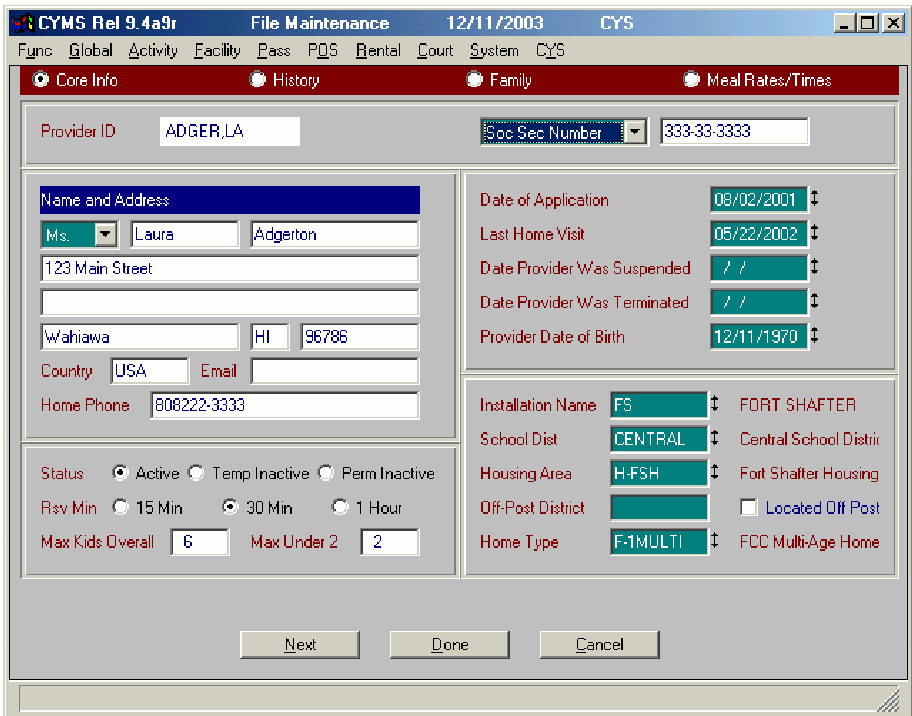
1) Highlight/double click the name to go to the **three core information screens** (or highlight the name and click the **Change** button at the bottom of the screen).

2) Highlight the name and then click one of the buttons in the middle of the screen (**Certification, Admin Action, Background, Endorse, Home Visits, Comments, 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 Providers in Browser?"** button. They might have been given a "Permanently Inactive" status on the first core screen.

2. Adding a New Provider – Core Information Screen

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



b. **Provider ID**:

1) Type the **<u>first five</u> letters of the last name, a <u>comma</u> and the <u>first two</u> 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 providers 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 provider 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) **Temporarily Inactive** – Provider is not currently accepting children, but is still on your roster (e.g. maternity leave)
3) **Permanently Inactive** – This makes the individual inactive. The name will not show on the browser unless you click the "Include Inactive Providers" toggle.

f. **Reservation Minutes**: Leave the default of **30 minutes**.

g. **Maximum Children**: (Complete after certification)

1) For a **Multi-Age Home**, this should be **6 for Max Kids Overall** and **2 for Max Under 2**
2) This enables CYMS to monitor the number of referrals for infants and total children in the home.
3) For an **Infant/Toddler home**, this should be **3 for Max Kids Overall** and **3 for Max Under 2**
4) If the provider does not take infants/pre-toddlers, the count would be 6 and 0.

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

1) **Date of Application, Last Home Visit, Date Suspended, Date Terminated** (local use)
2) **Date of Birth** (optional field leading to a birthday report)

i. **Home**: (key identifier information)

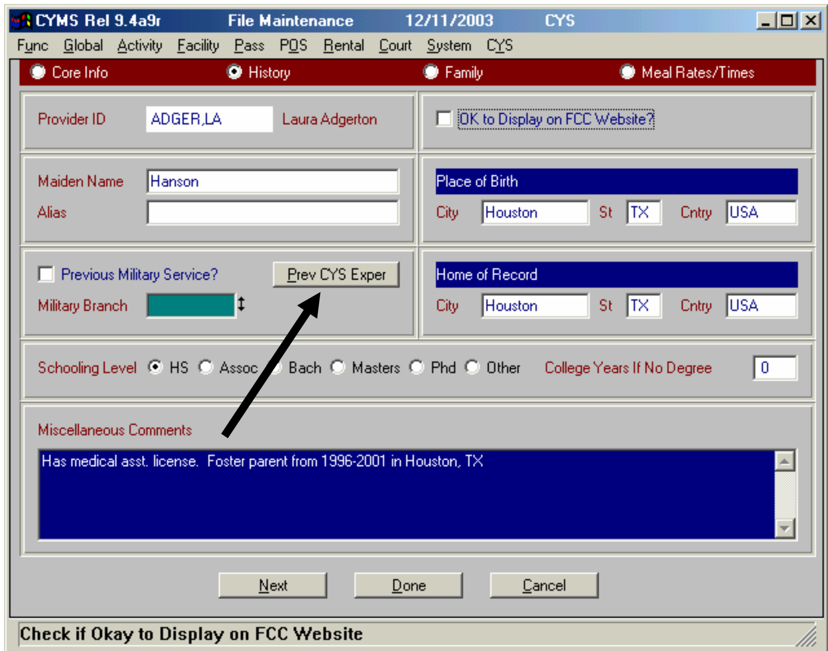
1) **Installation Name, School District, Housing Area, Off Post District**:
   - Select items from the picklists.
   - If picklists need to be updated, contact your CYMS Super User for assistance.

2) **Home Type**: After certification, choose the appropriate approved home type (**Multi-Age, Infant/Toddler, School-Age, Special Needs, etc)**.

3. Adding a New Provider – History Screen

a. **Background Checks**

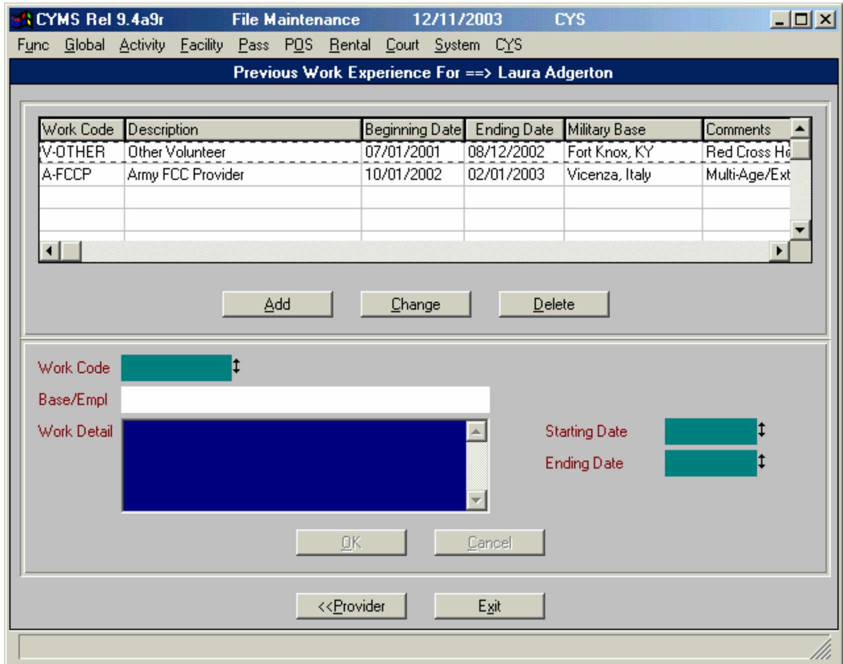
1) This screen provides space to gather common information for conducting background checks (**Maiden Name, Alias, Place of Birth, Home of Record, Previous Military Service, Military Branch**). Complete any appropriate fields. Use the blue **Miscellaneous comments** box to log any additional notes or background check data.



b. **Previous Experience**

1) The history screen also provides space to collect information on previous work or volunteer experience. Even though the button is titled Previous CYS experience, you can use this to log all relevant experience.

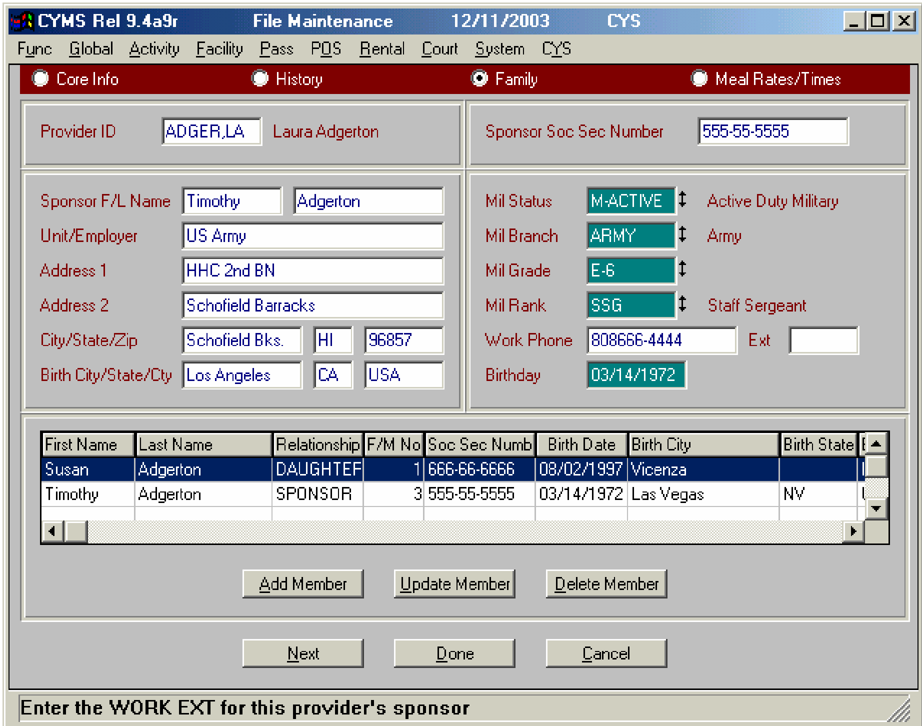
2) If you click the **Previous CYS Experience** button, a new screen appears (see screen shot below) where you can enter information about previous jobs or volunteer experience. This is not intended to be a complete resume – it is just a place to log previous directly related experience and any other information managers and TACS 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 **<<Provider** 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 Provider – Family Screen



a. The top part of this screen stores the provider's **sponsor information**. Fill in appropriate blanks. Select appropriate items from the picklists in the green fields.

b. The bottom section of the screen is for logging names and key information about other people (12 and over) who **live in the provider's household**. The individuals in this section will **require background checks** – and are linked to the section for tracking background checks.

c. Unfortunately, you must enter the sponsor information again in this bottom section for it to carry over to the background check screen. (Note: this has been fixed in CYMS Version 9.5 – you only have to enter the sponsor data once!)

d. Reminder note: All children 12 and under should be in the CYMS database and enrolled into the provider's home to account for ratios. FCC providers and their children under 12 should go through Central Registration and be enrolled in the home just like any other children (even if the annual registration fee is waived).

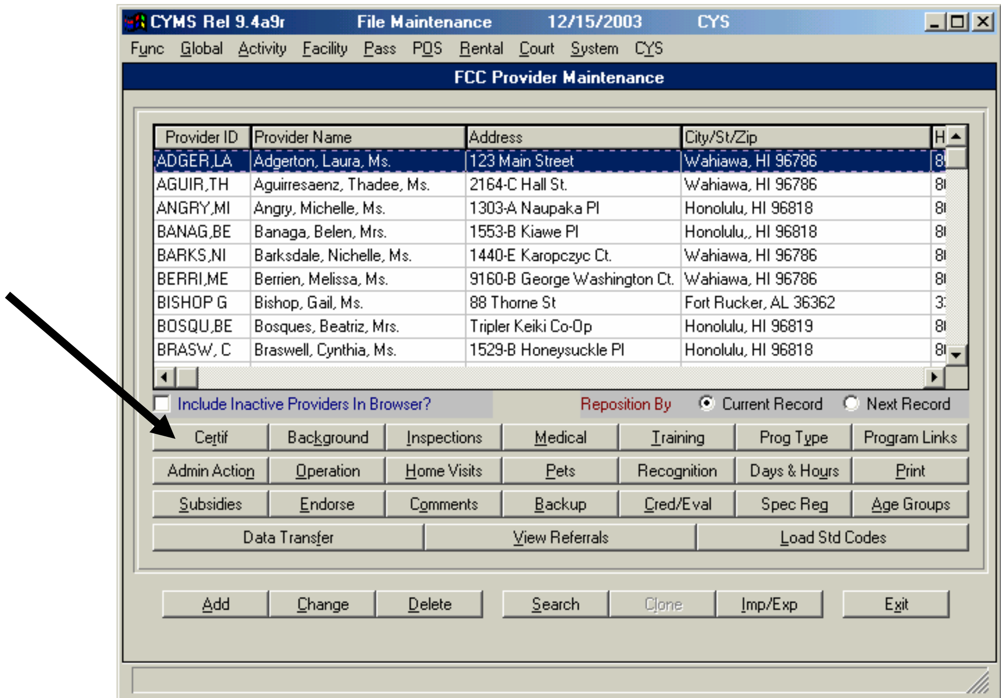
5. Adding a New Provider – Meal Rates/Times Screen

a. You will "adjust" this screen later (after certification). It initially pulls in default information from the CYS USDA rate setup tables and gives you space to record the meal times of the provider. Specific guidance for completing and using this screen can be found in the USDA guide.

b. 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.

6. General Comments on the Provider Button Screens

a. All of the buttons in the middle of the Main Browser screen lead to an administrative function related to the highlighted provider.



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

1) **Highlight** the provider; then **click** on the appropriate button.

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

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

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

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

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

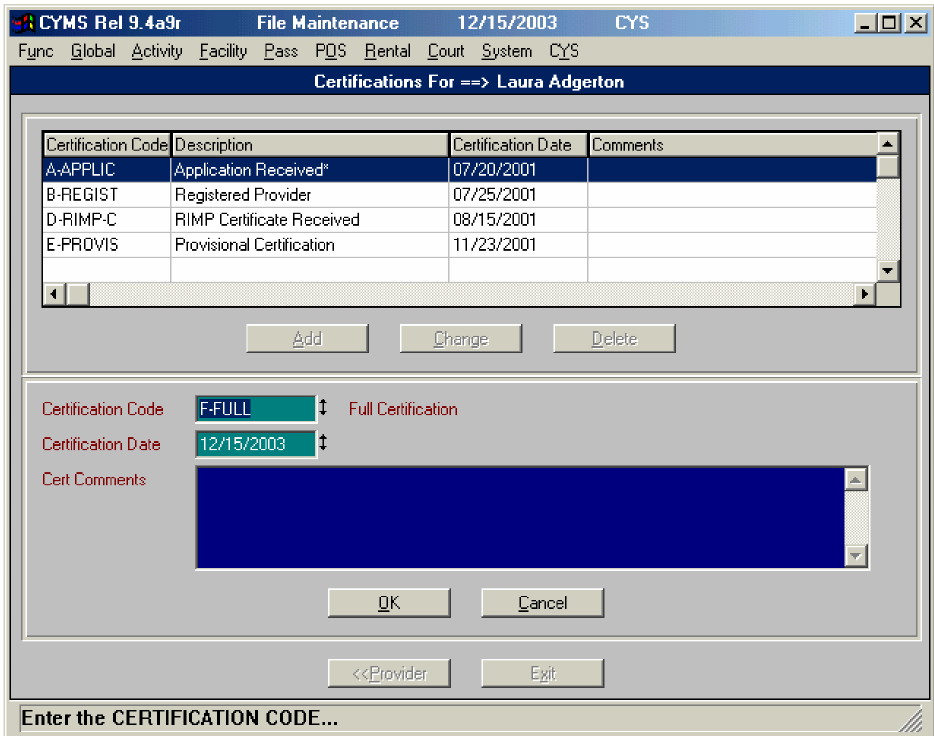
7) When you are finished, click **OK** to move the data back up to the browser box.

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

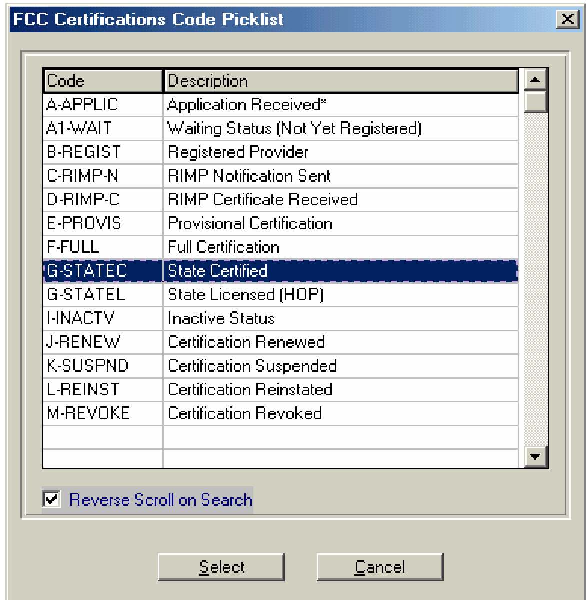
9) Note, the **Exit** button takes you all of the way out of the FCC module and puts you back on the main CYMS menu screen. Oops!

7. FCC Button Screens – Certification

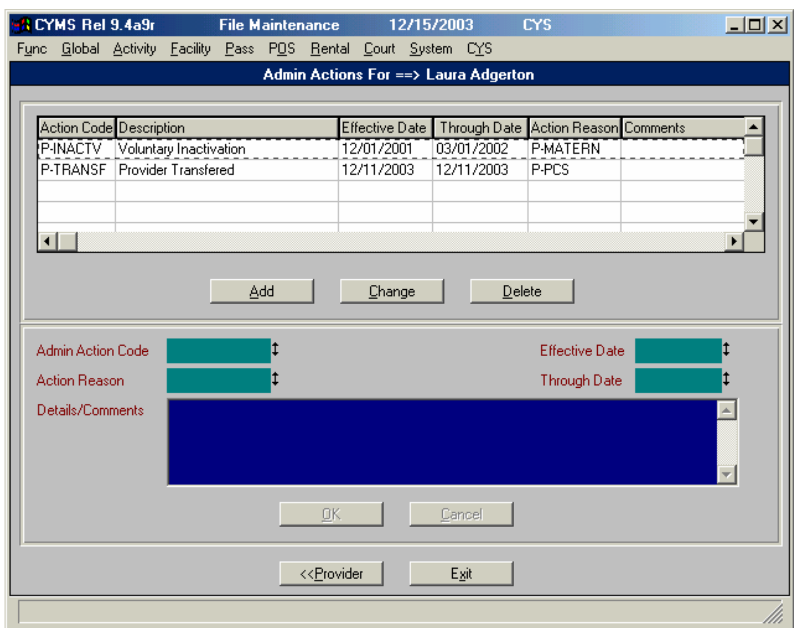
a. **Highlight** the provider's name and click the **Certif** button – you will be taken to the following screen.



b. The purpose of this screen is to track the key steps and dates leading originally to certification (Application, RIMP Provisional, etc.) and then the steps beyond certification (Renewal, Suspension, Termination, etc). See the pick list below.



8. FCC Button Screens – Admin Actions



a. 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.

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

- Certification denied, revoked, suspended
- Voluntary inactivation
- Withdrawal prior to certification

c. When a provider **leaves the program (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.

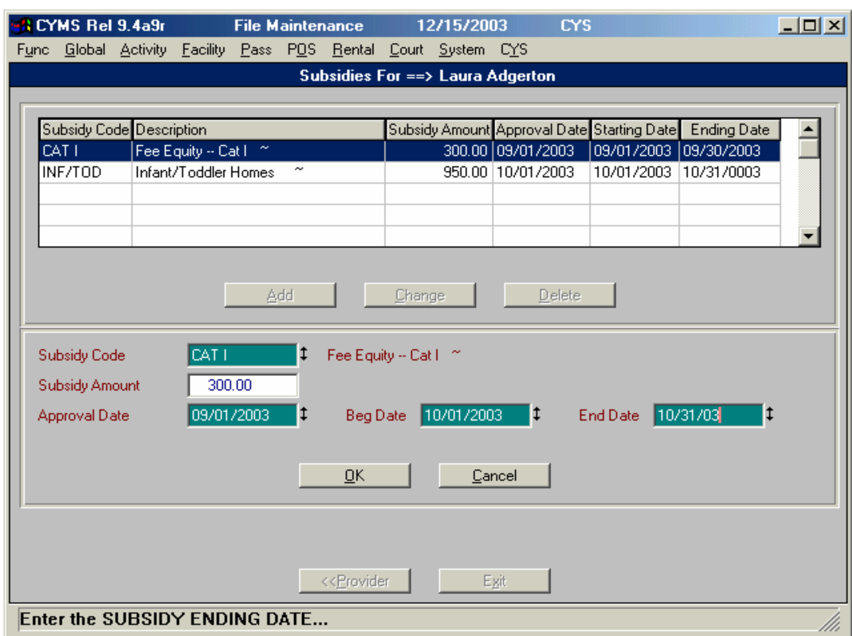
d. The **reasons for action** include administrative reasons (starting with the letter A-), program deficiencies (starting with D-) and personal reasons (starting with P-) including such things as:

- A-BGCHEK No Satisfactory Background Check
- A-DISCRM Failed – Non-Discriminatory Service
- A-FORMS Failed – Submit Required Info/Forms
- A-TRNG Failed – Complete Training Rqmts

- D-FACILT Deficiencies – Facility Rqmts
- D-FOOD Deficiencies – Food/Nutrition Rqmts
- D-SAFETY Deficiencies – Safety Rqmts

- P-HEALTH Health Reasons
- P-INCOME Not Enough Income
- P-JOBCYS Taking a Job In CYS
- P-REGS Objections to Regulatory Rqmts

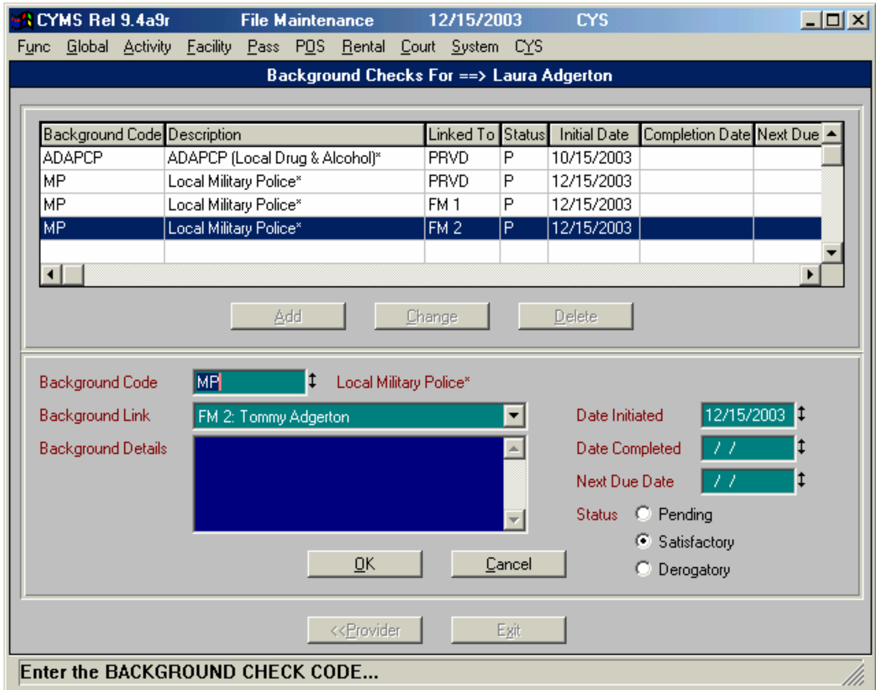
9. FCC Button Screens – Subsidies



a. This screen gives the beginning of a subsidy tracking system – we hope to expand this feature in future versions.

b. People are currently using this screen to log the types of approved subsidies. Some log data monthly as they approve/distribute the subsidies. Others log consolidated date quarterly or annually. We hope to be able to pull annual report data from this screen.

10. FCC Button Screens – Background Checks



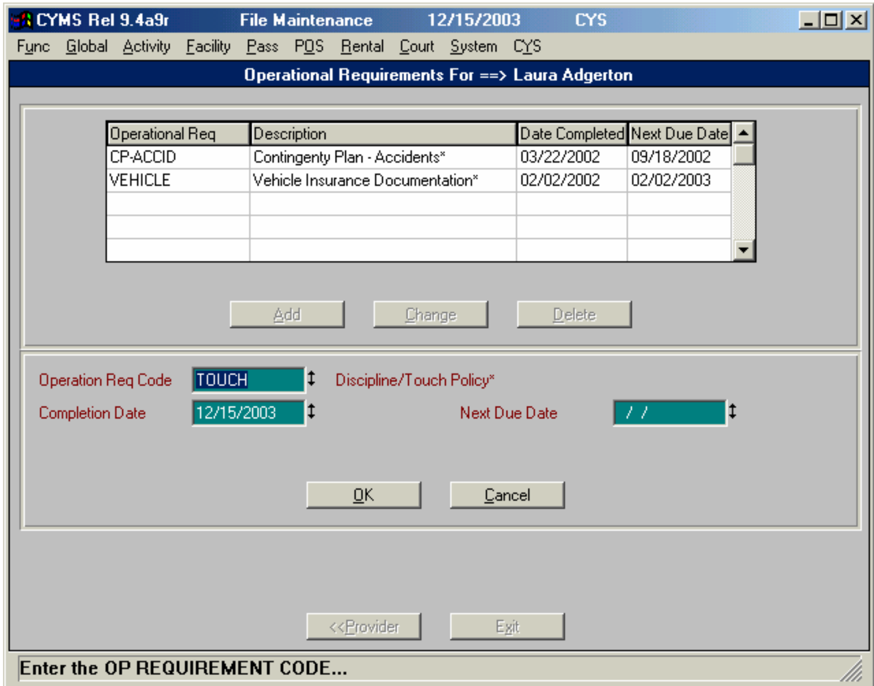
a. This screen allows you to track background checks for the provider and family members. The pick list for the Background Link field comes from the FCC core "Family" screen.

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

c. 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).

d. 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**

11. FCC Button Screens – Operational Requirements



a. This screen provides space to track completion of key operational requirements leading to certification: contingency plans, insurance, spouse/family member agreements, sample menus, touch policy, etc.

b. Reports will eventually be able to be run to show which requirements have not yet been completed and which requirements are coming due for renewal. This report has not yet been developed to cover a range of providers – however, the data can be printed out as part of an individual provider's file.

EDIT STOP !!!!!!! THE REST OF THIS IS STILL STAFF MODULE !!!!

12. FCC Button Screens – Endorsements

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:

13. FCC Button Screens – Inspections

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:

14. FCC Button Screens – Home 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

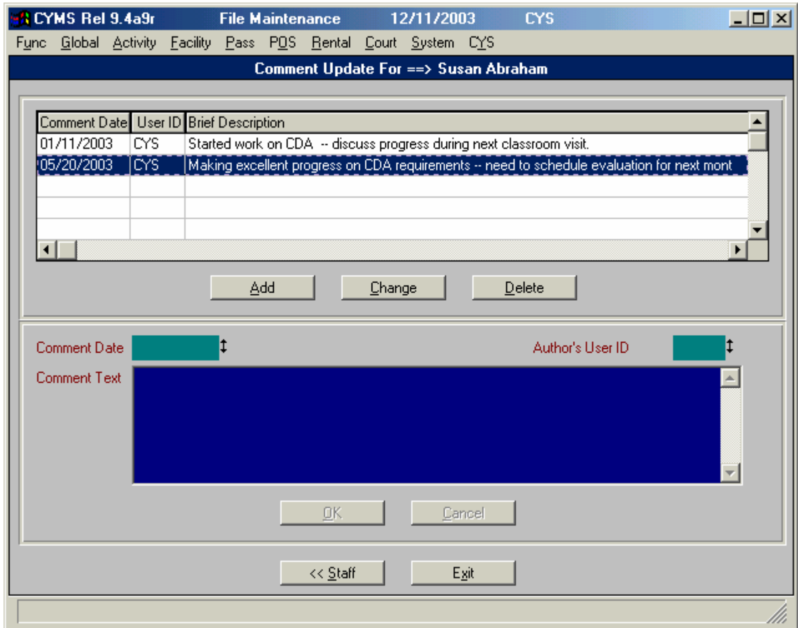
c. **Reports** can be run showing all visits or certain types of visits. (Go to **Reports – CYS – CDC Reports – Staff Room Visit Report**)

15. FCC Button Screens – Comments

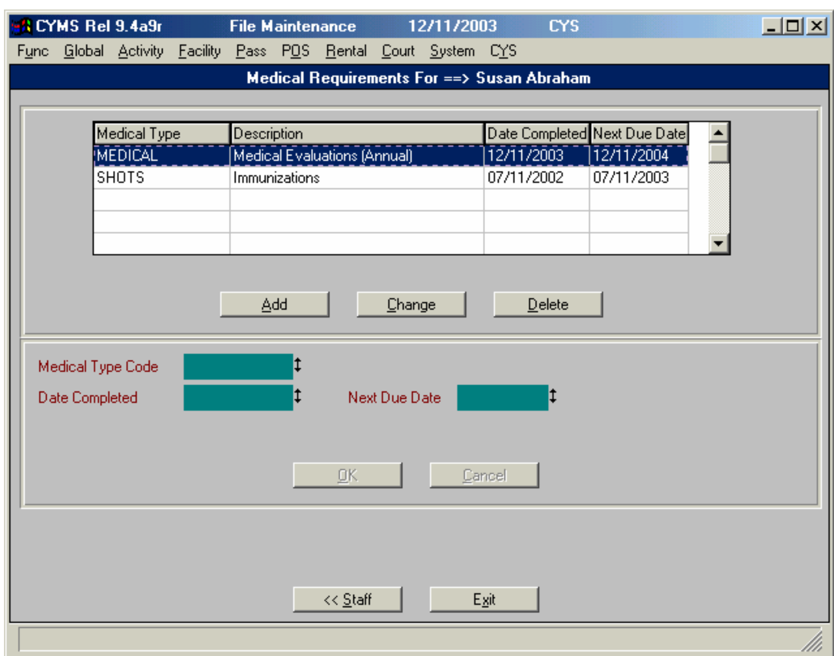
a. The Comments screen gives **open space for any general comments** (kind of like a sticky note). See screen shot below.

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** copies data; **Control V** pastes it)



16. FCC 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.

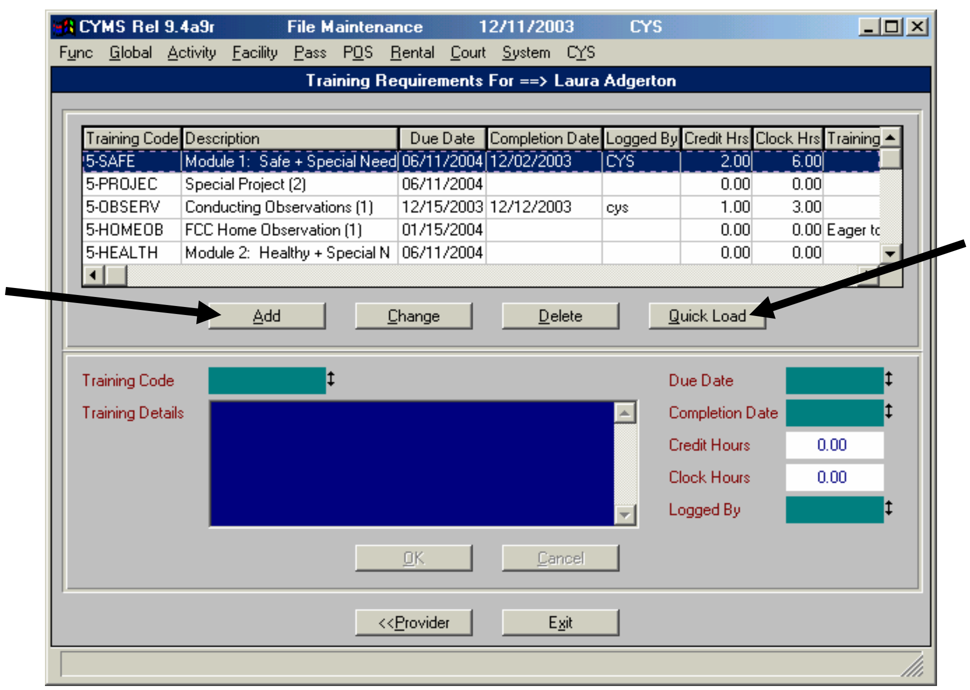
17. FCC Button Screens – Pets

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:

18. FCC Button Screens – Background Checks

19. FCC 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).

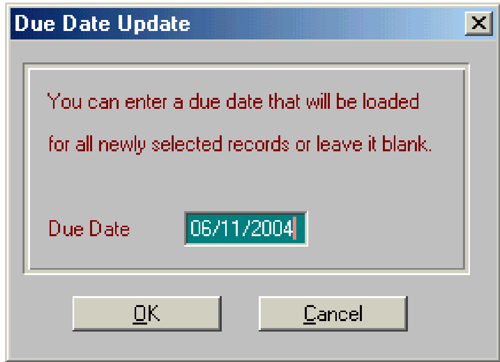
b. The **lists for the foundation training** can be further narrowed by adding a number code along with the letter code. We'll use caregiving as our example (you can substitute an **F, S** or **T** for the **C** for the other plans):
   - **C1 = Orientation**
   - **C2 = Work Experience**
   - **C3 =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

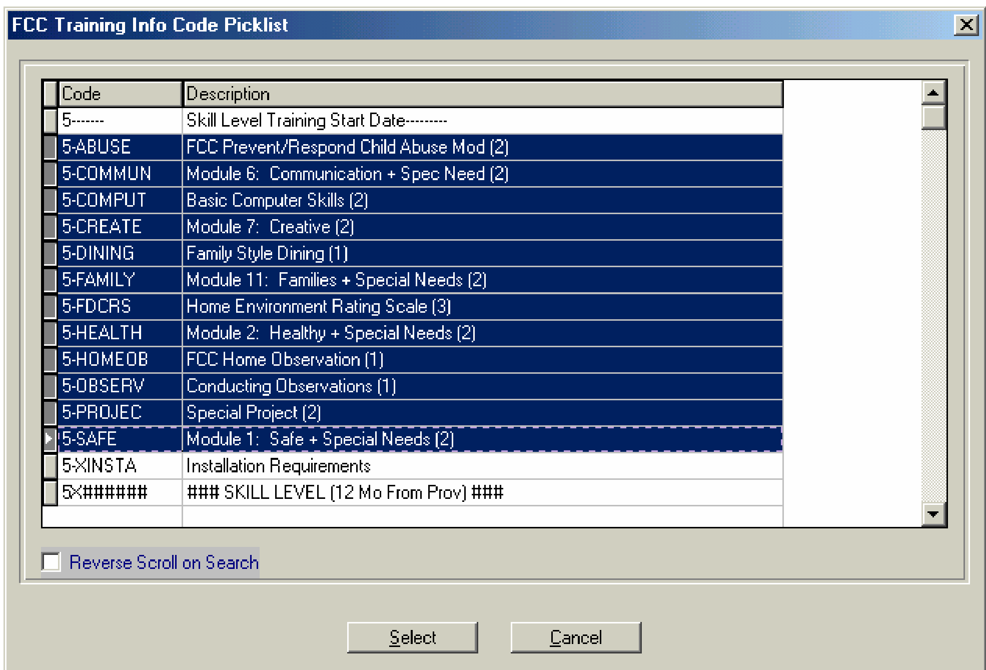
d. **To establish a training plan** (we will use **C3 – Entry Level** as our example):

   1) You and the employee agree on the date the **employee officially starts** this plan.
      - Click the **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 **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 **Quick Load** button and a little box will appear asking you for this date:



2) 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.

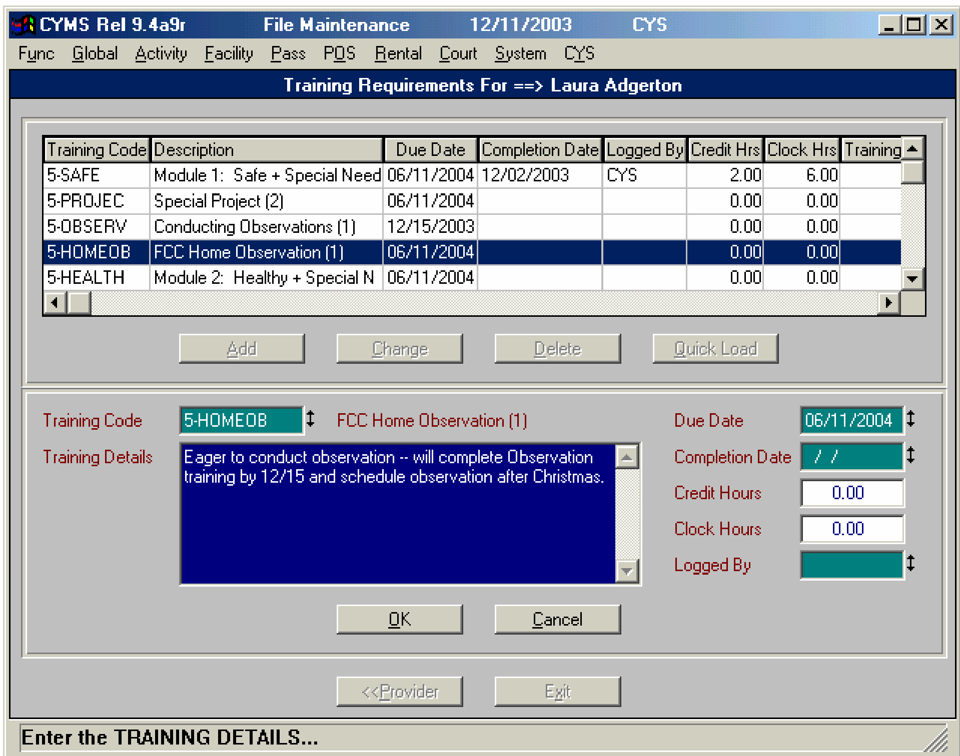
- The last code **C3-XREQU** is an **open-ended code**. It is not front loaded. It is added on demand when an employee does something outside of the normal scope (e.g. takes a college course, etc). See additional information on this below.

- 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.

3) 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.

4) 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.

5) 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.

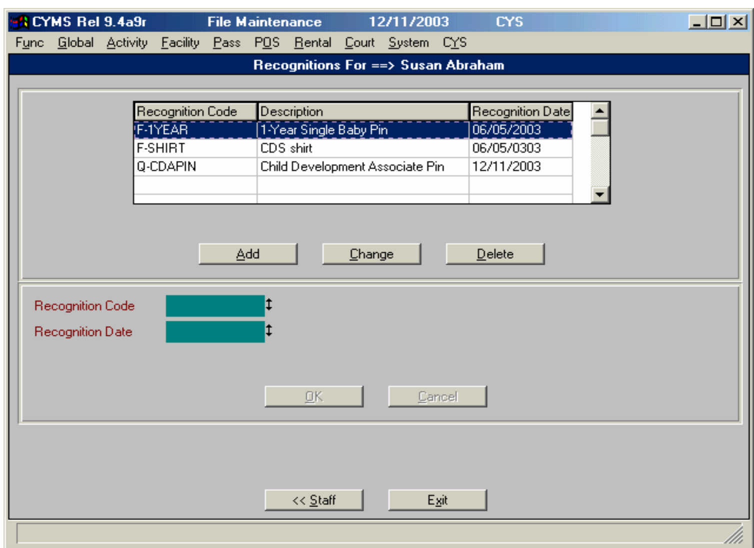
- There is also an **A6-XREQU** code (totally open ended) for use in logging one-time unique requirements. The description of the requirement should be typed into the blue box. Credit and clock hours are locally assigned.

- 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.

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

20. Staff Button Screens – Recognition



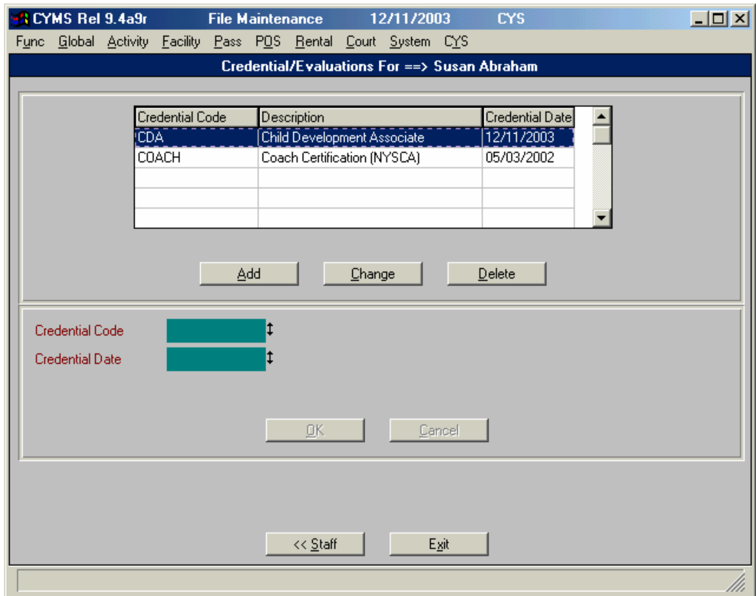
a. Use this screen to log both **Army and local recognition** for employees, volunteers and contractors:

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.

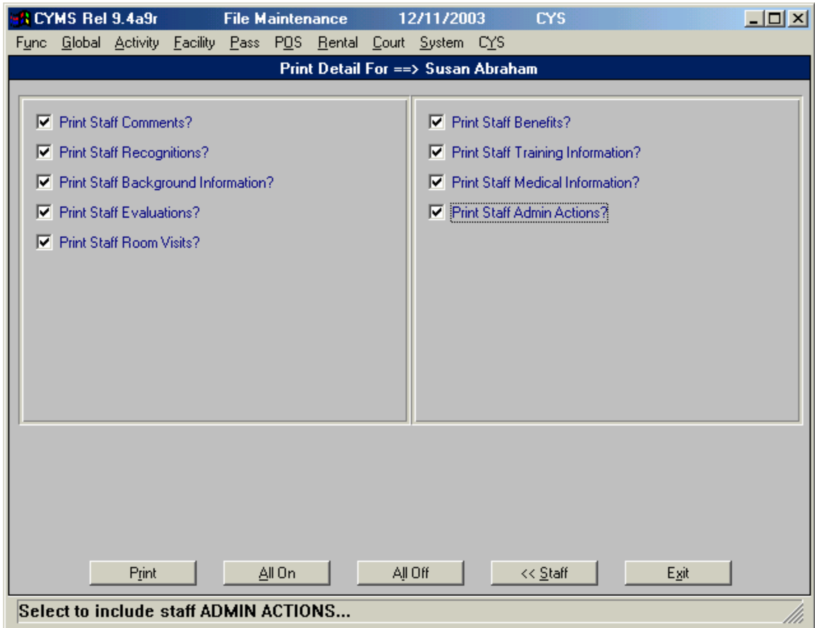
21. FCC Button Screens – Credentials/Evaluations



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

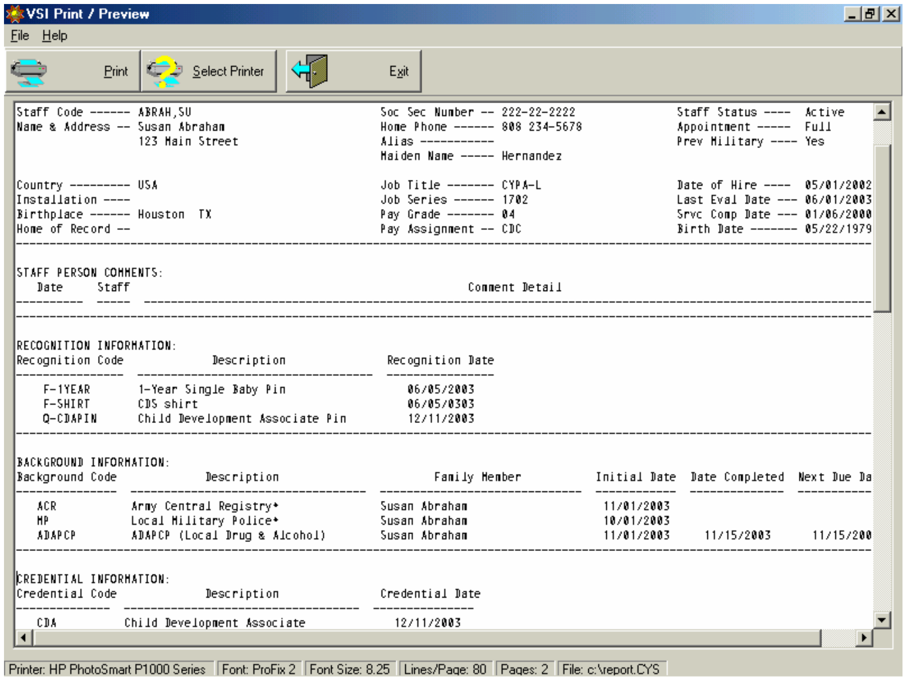
22. Admin Functions – Print File



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 view 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.



23. 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 provider 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.

24. 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 get this problem resolved before we start fielding the new CYMS Version 9.5.