

# CYMS TRAINING GUIDE

## CTG-A10 - REPORTS

Updated Apr 04

### Basic Concepts

Before running a report it is extremely important that you understand the concept of *Range and Browser vs. Browser Only*. This concept is prevalent on every report in the system. While every report allows you to choose between using the Range and Browser option and using the Browser Only option, some reports are more effective using one setting or the other.

### Range and Browser

When you select the Range and Browser option, you are telling the system the following:

- Report on everything from the Beginning Range through the Ending Range.
- Report on anything selected in the Browser. If nothing is highlighted in the browser, the report output will use just the Range.

### Browser Only

When you select the Browser Only option, you are telling the system to disregard the Beginning and Ending Range and just report on whatever is highlighted in the Browser.

### Browsers

A browser is a list of records in a scrollable box. Scroll up/down with the mouse or up/down arrow keys to view all of the records. Click on the browser column headings to sort the browser in that column's data order.

Press the first letter or number of the record you want to find and the cursor will move to the first occurrence of that letter. Press the space bar to clear the buffer and enter another letter or number to search again. For example, if you are in an activity browser, click on any activity and start typing the numbers of the activity you wish to find.

To highlight more than one item in a browser, hold down the **Ctrl** key on the keyboard and click on each item you want to select.

To highlight consecutive items in a browser, highlight the first one, then hold down the **Shift** key and click on the last item. All the items between the first and last will be selected.

### Example 1

You want to run a Roster Report for all your Infant rooms. Your infant rooms are numbered as follows: 900100 Section 01, 02, 03, 04, 05. You have two options:

- 1 Select the Browser Only toggle and highlight each Infant room in the Activity/Section browser (by holding down the **Ctrl** key and clicking on each section for activity 900100).

CYMS Rel 9.5a3i      Reports      12/23/2003      CYS

Func Global Activity Facility Pass POS Rent Court System Golf CYS

### Activity Rosters

Activity/Section      Entries: 5      Clear Entries

Actv No	Sec	Description	Type	Stat
900000	01	1234 - Gir FD (Inf)	CDC	A
900100	01	1783- Gir FD Inf	CDC	A
900100	02	1783- A117 FD (Inf)	CDC	A
900100	03	1783- A116 FD (Inf)	CDC	A
900100	04	1783- A116 FD (Inf)	CDC	A
900100	05	1783- a118 FD (Inf)	CDC	A
900102	01	1783- A109 FD (Tod)	CDC	A
900103	01	1783- A101 FD (PS)	CDC	A
900107	01	1783- A116 FD (Pt1)	CDC	A
900108	01	1783- A109 FD (Pt2)	CDC	A
900149	01	Aliamanu Hrly Meal P	CDC	A
900163	01	1782- B126 PDP5-3	CDC	A
900200	01	900-I FD (Inf)	CDC	A
900200	02	900-T2 FD (Inf)	CDC	A
900202	01	900-T1 FD (Tod)	CDC	A
900202	02	900-PS FD (Tod)	CDC	A

Beg Actv/Sec      [ ]      Wildcard Selection

End Actv/Sec      999999      Wildcard Selection

Wildcard      [ ]      (...3..' Codes w/3 @ Post#4)

Range And Browser       Browser Only

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Age Range      0.00      Thru      99.99

Grade Range      00.00      Thru      99.00

Date Range      07/01/1985      Thru      12/31/2099

Use Section Date       Use Enrollment Date

Section Stat       Active       Inactive       Canc       Pend

Enrolled Stat       Enroll       W/List       Lotto       Canc

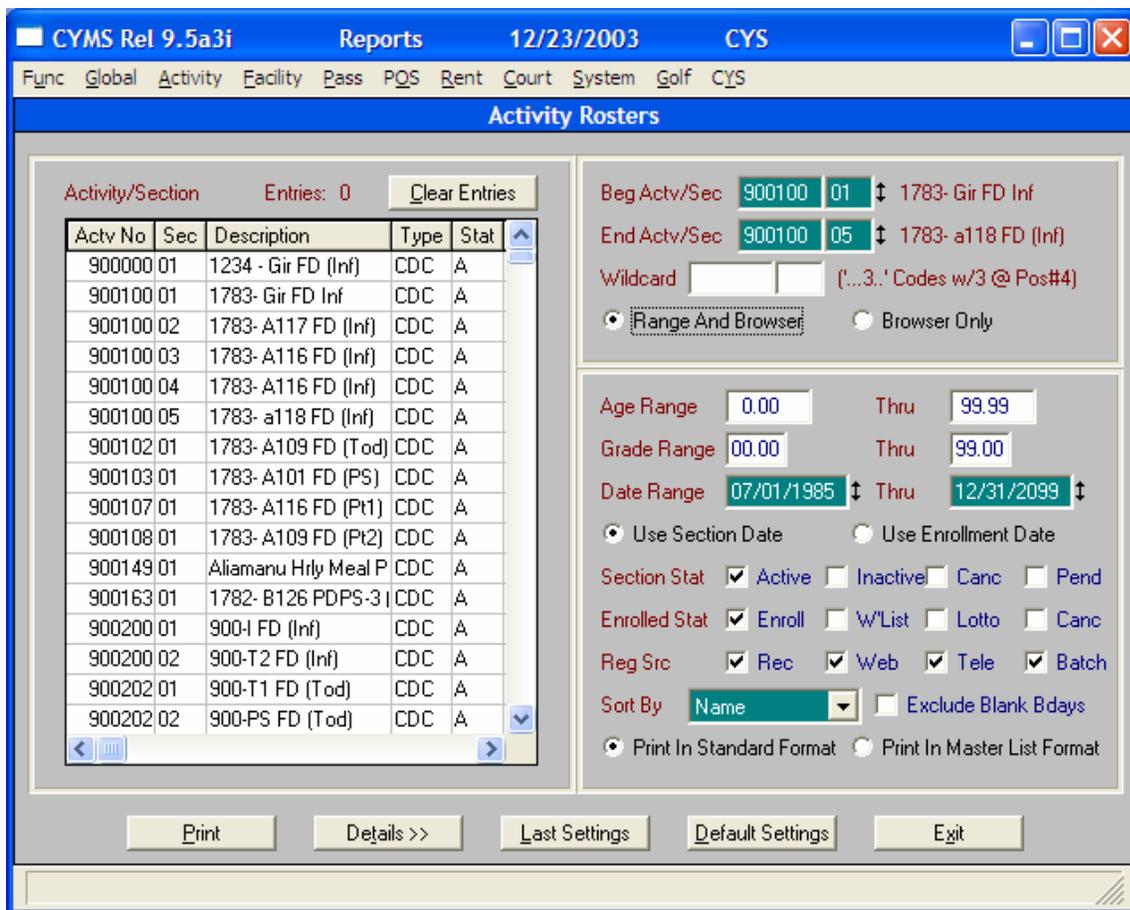
Reg Src       Rec       Web       Tele       Batch

Sort By      Name       Exclude Blank Bdays

Print In Standard Format       Print In Master List Format

Print      Details >>      Last Settings      Default Settings      Exit

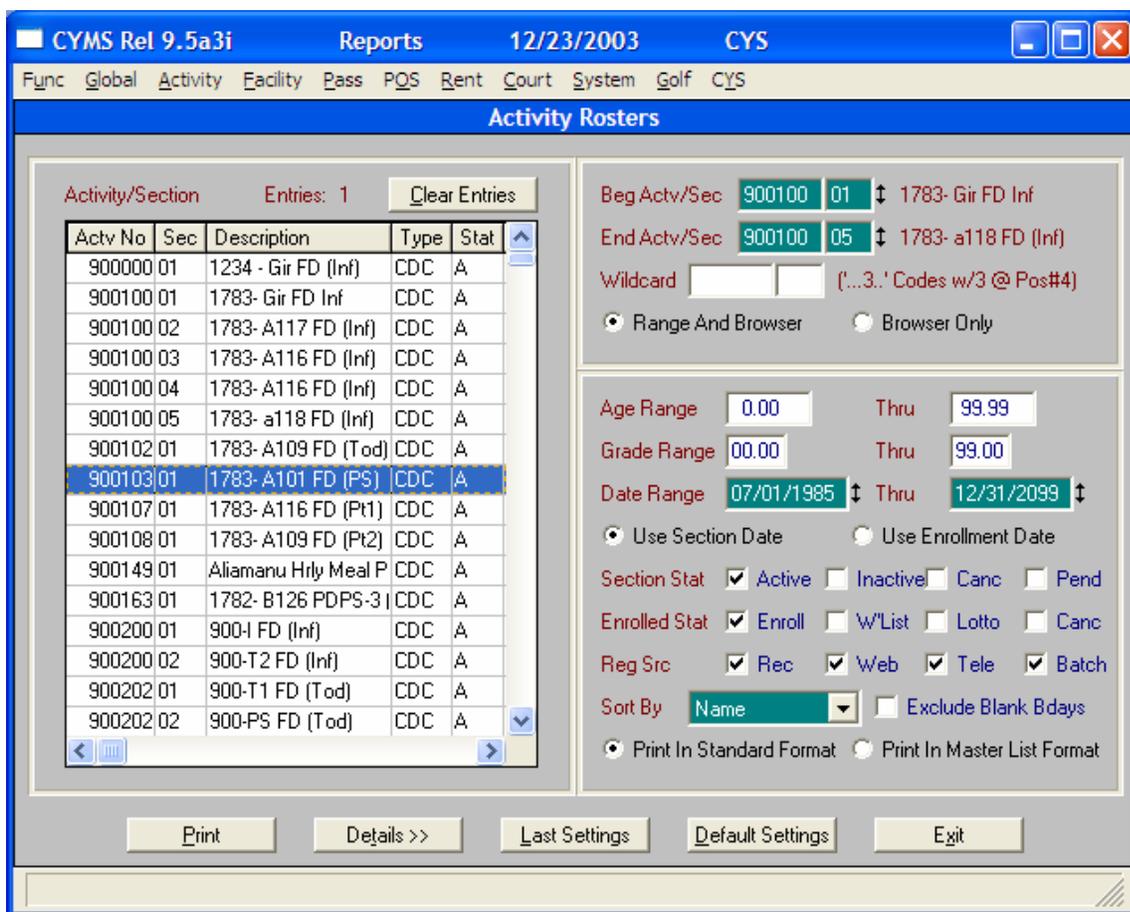
- 2 Select the Range and Browser toggle, and right-click in the **Beginning Act/Sec** field and select the first Infant room (900100 Section 01). Then right-click in the **Ending Act/Sec** and select the last Infant room (900100 Section 05). By doing this you will get rosters for section 01,02, 03, 04, and 05.



## Example 2

You want to run a Roster Report for all your Infant and Pre-School rooms. Your Infant rooms are numbered 900100 section 01, 02, 03, 04, 05; your Pre-School rooms is numbered 900103 section 01. In between your Infant and Pre-school rooms there is a toddler room.

You could use the Range and Browser option and enter your infant rooms in the range, then highlight the pre-school rooms in the browser. You also could enter the pre-school rooms in the range and highlight the infant rooms in the browser.



## Global Reports

### Global Childcare Statement (Tax Statement for Parents)

The Global Childcare Statement report provides parents with a record of all the payments made towards activity balances in classes that have been flagged as “child care” activities (see Activity Section Maintenance - Core 2 screen). This report can also be run to include money paid against the family’s Pass Registrations (Annual Registrations) or Pass Visits (Hourly Care/Late Pickups).

The statements should be run at the end of the calendar year for distribution to the parents, but they can be run for any date range. This is helpful if you have a parent that is PCSing in the middle of a calendar year. The report prints the Transaction Date, Family Member, Module, Transaction Reference, Clerk, and Transaction Amount for each selected household.

Go to Reports → Global → Global Financial Reports → Global Childcare Statement.

*Hint:* On the Details screen, skip pay codes that reflect discounts or methods of payment where no money is exchanged (e.g., vacation pay codes, coaches discounts, employee discounts, agency pay codes, etc.) in both the Credits and Debits browsers. Failure to skip these types of codes may overstate the parent’s Net Payment amount.

This report is typically run with the Browser Only option, but if running by classroom on the Detail screen, you use the Range and Browser option with a name range of <blank> thru ////////////////////.

The following screen shots reflect running the report for one person:

Household Entries: 1 Clear Entries

Name	Address
Mabe, Blake	1065 Kukui Drive
Mace, Dawn	94-124 Akaku Plac
MacFarlane, Michael	4010 C Parrish Stre
Machado Jr., Melvin L.	91-1537 Pukanala
Mack, Cleveland	2004-B Pomelaiki F
Mack, Walter J.	1613-B Funston Lp
MacNeilly, Matthew	3613 B McCormack
Macon, Marcus K	91-143 Puaine Plac
MacPherson, Alexandria M.	6495 B 103st
Madkins, Lawrence H	419 Funston Rd
Madrid, Paul	1998 B Ulohe Circle
Madrigal, Myma M.	325-A Krukowski R
Maeataanoa, James	506-A Olive Pl
Mageary, Mark E.	2101B Flame Place
Mahmood, Mohammed	1600 Wilikina Dr
Major, Natasha	3164-B Lakeview C
Maldonado, Elliott J	3900B Hewitt stree

Begin Name [ ] ↑  
End Name [ ] ↑  
 Range And Browser  Browser Only

Beginning Transaction Date [01/01/2003] ↑  
Ending Transaction Date [12/31/2003] ↑

Include Actv Reg?  Include Pass Reg?  
 Include Point-of-Sale?  Include Pass Visits?

Comnt Code [ ] ↑ Wildcard Selection

Print Statements As Mailers?

Print Details >> Last Settings Default Settings Exit

Details Screen

Beg Actv [0] ↑  
End Actv [999999] ↑  
Wildcard [ ] ie: (.1...) for 1's in pos#3

Beg T/C [ ] ↑  
End T/C [ ] ↑  
Wildcard [ ] ie: (.1.) for 1's in pos#3

Beg Type [ ] ↑  
End Type [ ] ↑  
Wildcard [ ] ie: (.A.....) for A's in pos

Skip	Credits	Include	Skip	Debits	Include
26-39th MP FRG		01-Check	07-Journal Pmt		01-Check
27-PSAG Disc		02-Cash	18-AluLike		02-Cash
28-Vol Disc		03-Visa/MC	19-ACS-VOL		03-Visa/MC
29-Sports Disc		04-Am Express	20-ACS-PLDC		04-Am Express
30-Coach Disc		05-Discover	21-ACS-AFTB		05-Discover
31-Parent Par		10-Gift Certif	22-Hui		10-Gift Certif
40-Vac Credit		98-Rfnd Finance	23-Chapel		97-DONOTUSE
07-Journal Pmt		99-System	24-FCC		98-Rfnd Finance
		97-DONOTUSE	25-732nd MI Bat		99-System

Print << Back Exit

## Global Trial Balance

The Global Trial Balance report is used to show anyone in the system that has a debit or credit balance in any Module or in selected Modules. The report lists Household Name, the Module-By-Module Balances and Total Balance Due for the ranges selected.

Go to Reports → Global → Global Financial Reports → Global HH Trial Balance.

*Hint:* In the **Minimum Balance To Show** field, enter *1.00* to view households who have a balance due of \$1.00 or more in any of the modules included in the Balances to Show column. Enter *-1.00* in the **Minimum Balance To Show** field to view households who have a credit balance of \$1.00 or more in any of the Modules included in the Balances to Show column. Enter *0.00* in the **Minimum Balance To Show** field to view all households with a credit or debit balance in any of the Modules included in the Balance to Show column.

Other dollar amounts can be substituted. For instance, if you want to see people with a balance of \$100 or more, enter in *100.00* in **Minimum Balance to Show** field. Select the **Show Zero Balances** option to view those households with a zero balance.

This report is typically run with the Range and Browser option, using a name range of *<blank>* thru *////////////////*.

The following screen shot reflects running the report for debits and credits for all households for all modules:

Household	Entries: 0	Clear Entries
Name	HouseNo	Address
Abas, Summer	575089176	95-111 Kipapa Dr
Abbott, Dannie	497728030	9100-D James M.
Abdussalaam, Mustaf	410131647	1977 Pulu Circle :
Abrams, Joseph	160666263	95-955 Wilcalo S
Absher, Douglas	566837291	87-950 Kaulauku
Acosta, Kevin	582198049	404-B Cocos Plac
Acosta, Salvador N.	576025398	637C Valley View
Adames, Ricky	459411330	1814 A Gauava F
Adams, Charles	14362412	94-1105 Mauele :
Adams, Douglas L.	227216881	p.o. box 29623
Adams, James E	41706917	2107-C Ka N'io
Adams, Thia	127884364	C-Co 725 MSB
Adams, Thomas P.	247337887	2194 C Malohi R
Adams, Timothy S.	493863046	1202-C Hase Dr.
Addison-Moore, Janic	95623033	7028-B Floyd St
Adger, Jassen	438319495	1333 C W'ili W'ili C

## Global HH Transaction History Status

This report shows all transactions that have taken place on a household, including registrations, payments, payment reversals, cancellations, fee increases/decreases, billings, etc. It can be used to help troubleshoot household issues or simply to provide proof to parents that certain payments/transactions have been made.

Go to Reports → Global → Global Financial Report → Global HH Transaction History Listing.

*Hint:* Pay close attention to the transaction date range and module selections (toggle them all). On the Details screen, make sure the **All Transaction Types** option is selected.

This report is typically run using the Browser Only option.

The following screen shot reflects running a Transaction History for one household:

**Household** Entries: 1

Name	HouseNo	Address
Mabe,Blake	1065 Kukui Drive	
Mace,Dawn	94-124 Akaku Plk	
MacFarlane,Michael	4010 C Parrish St	
Machado Jr.,Melvin L	91-1537 Pukanal	
Mack,Cleveland	2004-B Pomelaiki	
Mack,Walter J.	1613 -B Funston	
MacNeilly,Matthew	3613 B McCorna	
Macon,Marcus K	91-143 Puaine Pl	
MacPherson,Alexand	6495 B 103st	
Madkins,Lawrence H	419 Funston Rd	
Madrid,Paul	1998 B Ulohe Cir	
Madrigal,Myrna M.	325-A Krukowski	
Maeataanoa,James	506-A Olive Pl	
Mageary,Mark E.	2101B Flame Pla	
Mahmood,Mohamme	1600 Wilikina Dr	
Major,Natasha	3164-B Lakeview	

Beginning Name:

Ending Name:

Range And Browser  Browser Only

Beginning Txn Date:

Ending Txn Date:

Print Listing As A Mailer?  Print Running Balance?

Actv Reg?  Lockers?  Rentals?

Crt Rsv?  Pass Mgt?  Trips?

Fac Rsv?  POS?  Trainer?

## Global Receipt Reprint

This report allows you to reprint a receipt for a customer.

*Note:* Some receipts cannot be reprinted. If the system cannot reprint the receipt, print a Transaction History for the household using Global HH Transaction History Listing (see above).

*Hint:* There are many ways to run this report. The easiest way is to use Global Household Inquiry to find the receipt number of the transaction you want to print.

Go to Inquiry → Global → Global Household Inquiry. In the **Lookup** field, enter the last name of the household. Press **Enter**. On the Household Listing screen, highlight the household and click **Select**. Click **Txn History**. Click **OK** to accept all History Search Criteria.

**Note:** The “Descending Order” option shows the newest transactions at the top of the list.

Find the transaction and scroll to the right until you see the receipt number. Click **Exit** twice to return to the Main Menu.

Go to Reports → Global → Global Financial Reports → Global Receipts Reprint.

### If you have the receipt number

Select the **All Households** option. In the **Date Range** fields, enter 07/01/1985 thru today’s date. Enter a time range of 12:00-12:00. Enter the receipt number in both of the **Rcpt Range** fields.

**Note:** If you don’t enter the actual receipt number, you are telling the system to print all receipts for all households. You do NOT want to do this)

In the **User Range** fields, enter <blank> thru zzz. Toggle on the box next to each module.

The following screen shot reflects running a receipt reprint for a specific receipt number:

**Household** Entries: 0

Name	HouseNo	Address
Abas,Summer	95-111	Kipapa Dr
Abbott,Dannie	9100-D	James M.
Abdussalaam,Mustaf	1977	Pulu Circle
Abrams,Joseph	95-955	Wilcalo S
Absher,Douglas	87-950	Kaulauku
Acosta,Kevin	404-B	Cocos Plac
Acosta,Salvador N.	637C	Valley View
Adames,Ricky	1814 A	Gauava F
Adams,Charles	94-1105	Mauele
Adams,Douglas L.	p.o. box	29623
Adams,James E	2107-C	Ka N'io
Adams,Thia	C-Co	725 MSB
Adams,Thomas P.	2194 C	Malohi R
Adams,Timothy S.	1202-C	Hase Dr.
Addison-Moore,Janic	7028-B	Floyd St
Adger,Jassen	1333 C	Wili Wili C

All Households  Selected Households

Date Range: 01/01/2000 - 12/31/2003  
 Time Range: 12:00 - 12:00  
 Rcpt Range: 6072 - 6072  
 User Range: - zzz

Credit Card Transaction Number: 0

Print Last Receipt For H/H?

Actv Reg?  Rentals?  League?  
 Fac Rsv?  Lockers?  Trainer?  
 Pass Mgt?  Trips?  
 POS?  Crv Rsv? Copies: 1

*If You Don't Have the Receipt Number*

Select the **Selected Households** option. Highlight the appropriate household in the Household browser box. Click on a household and type the first few letters of the sponsor's last name to jump to the names that start with those letters.

In the **Date Range** fields, enter the approximate date of the receipt being requested. In the **Receipt Range** fields, enter 0 thru 999999999. This will print any receipts for this household in the Date Range.

The following screen shot reflects running the report when you don't have the receipt number:

**Household** Entries: 1

Name	HouseNo	Address
Mabe, Blake	1065 Kukui Drive	
Mace, Dawn	94-124 Akaku Pl	
MacFarlane, Michael	4010 C Parrish St	
Machado Jr., Melvin	91-1537 Pukanal	
Mack, Cleveland	2004-B Pomelaiki	
Mack, Walter J.	1613 -B Funston	
MacNeilly, Matthew	3613 B McCornar	
Macon, Marcus K.	91-143 Puaine Pl	
MacPherson, Alexan	6495 B 103st	
Madkins, Lawrence H	419 Funston Rd	
Madrid, Paul	1998 B Ulohe Cir	
Madrigal, Myrna M.	325-A Krukowski	
Maeataanoa, James	506-A Olive Pl	
Mageary, Mark E.	2101B Flame Pla	
Mahmood, Mohammed	1600 Wilikina Dr	
Major, Natasha	3164-B Lakeview	

All Households  Selected Households

Date Range: 12/22/2003 - 12/22/2003  
 Time Range: 12:00 - 12:00  
 Rcpt Range: 0 - 999999999  
 User Range: ZZZ

Credit Card Transaction Number: 0

Print Last Receipt For H/H?

Actv Reg?  Rentals?  League?  
 Fac Rsv?  Lockers?  Trainer?  
 Pass Mgt?  Trips?  
 POS?  Crt Rsv? Copies: 1

## Activity Reports

### Activity Listing

This report can be run to quickly show if you are at capacity. It includes the Maximum Count, Enrolled Count, and Available.

Go to Reports → Activity → Activity Status Reports → Activity Listing.

*Hint:* Prior to running this report you should go to Utilities → Activity → Roster Utilities → Roster Resequencing. Once there, select your center's beginning and ending class range and select to **Recalculate Enrollment Count Totals for Range**. All other toggle boxes should NOT be selected. Failure to do this prior to running the Activity Listing may skew your results.

**Roster Resequencing**

Beg Activity/Section: 900100 01 ↓ 1783- Gir FD Inf  
End Activity/Section: 900108 01 ↓ 1783- A109 FD (Pt2)

Recalculate Enrollment Count Totals For Range?  
 Recalculate Roster Fee Totals For Range?  
 Recalculate Misc Income/Expense Totals For Range?  
 Recalculate Instructor Pay Totals For Range?  
 Reset Roster Processed Flags For Range?  
 Reset Roster Overpayments For Range?  
 Reset Instructor Percent/Per Head/Flat Payments  
 Make Roster Amount Paid Equal Fee Amount Less Discount  
 Recalculate Roster Refund Totals For Range?

Recalc Exit

*Hint:* When running the Activity Listing, make the **Sec Date** range 7/1/1985 thru 12/31/2099 and select to create a **Detail Report**.

The following screen shots reflect running the report for one center:

**Activity Listing**

Activity Number Entries: 0 Clear Entries

Actv No	Actv Description	Type	Status
900000	1234 - FD (Inf)	CDC	A
900100	1783- FD (Inf)	CDC	A
900102	1783- FD (Tod)	CDC	A
900103	1783- FD (PS)	CDC	A
900107	1783- FD (Pt1)	CDC	A
900108	1783- FD (Pt2)	CDC	A
900149	Aliamanu Hrly Meal P	CDC	A
900163	1782- PDPS-3 3.5 Hr	CDC	A
900200	900 - FD (Inf)	CDC	A
900202	900 - FD (Tod)	CDC	A
900203	900 - FD (PS)	CDC	A
900207	900 - FD (Pt1)	CDC	A
900208	900 - FD (Pt2)	CDC	A
900253	900 - PDPS5 (PS)	CDC	A
900263	900 - PDPS3 (PS)	CDC	A
900273	900 - PDPS2 (PS)	CDC	A
900300	30-FD (Inf)	CDC	A

Beg Actv 900100 ↓ 1783- FD (Inf)  
 End Actv 900108 ↓ 1783- FD (Pt2)  
 Wildcard [ ] [ ] (...3.' Inc w/3 @ Post#4)  
 Range And Browser  Browser Only

Beg Type [ ] ↓ Wildcard Selection  
 End Type [ ] ↓ Wildcard Selection  
 Wildcard [ ] (...1.' Inc w/1 @ Post#4)

Sec Date 07/01/1985 ↓ Thru 12/31/2099 ↓

Print  Summary Report  Detail Report

Sort by  Actv  Desc  Type  Date

Print Details >> Last Settings Default Settings Exit

Details Screen:

**Activity Listing - Details**

Print Fields Avail Select Any Two

Waitlist [ ] Add >> Available Slots Status [ ]  
 << Del [ ]

Show  Normal  Lottery  Both  All

Section Status To Show  
 Print Active Sections  
 Print Inactive Sections  
 Print Pending Sections  
 Print Cancelled Sections

Print << Back Exit

## Birthday/Grade Report

The main purpose of this report is to identify children in your center who have a birthday in a given month. Go to Reports → Activity → Activity Enrollment Reports → Birthday/Grade Report.

*Hint:* Accept the defaults for the **Age Range To Include** fields (0 thru 999.99) and the **Grade Range To Include** field (0 thru 19.00).

If you are running this report for more than one activity, select the option to **Sort By Activity**. Next, click **Details>>** screen and toggle on the **New Page Per Activity** option. This will print a sheet for each room and allow you to post each report in the appropriate room.

Toggle on the Show Birthday option and make sure you select the toggle for the appropriate month.

The following screen shots reflect running the report for children in the infant room with a December birthday:

Actv No	Sec	Description	Type	Stat
900000	01	1234 - Gir FD (Inf)	CDC	A
900100	01	1783- Gir FD (Inf)	CDC	A
900100	02	1783- A117 FD (Inf)	CDC	A
900100	03	1783- A116 FD (Inf)	CDC	A
900100	04	1783- A116 FD (Inf)	CDC	A
900100	05	1783- a118 FD (Inf)	CDC	A
900102	01	1783- A109 FD (Tod)	CDC	A
900103	01	1783- A101 FD (PS)	CDC	A
900107	01	1783- A116 FD (Pt1)	CDC	A
900108	01	1783- A109 FD (Pt2)	CDC	A
900149	01	Aliamanu Hily Meal P	CDC	A
900163	01	1782- B126 PDPS-3	CDC	A
900200	01	9004 FD (Inf)	CDC	A
900200	02	900-T2 FD (Inf)	CDC	A
900202	01	900-T1 FD (Tod)	CDC	A
900202	02	900-PS FD (Tod)	CDC	A

## Details Screen:

## Activity Roster

This report shows children enrolled in your CDC, SAS, and YS camps and programs, as well as FCC homes. It is run by classroom or home and can be run to print names of the children, emergency contacts, addresses, birthdays, and much, much more.

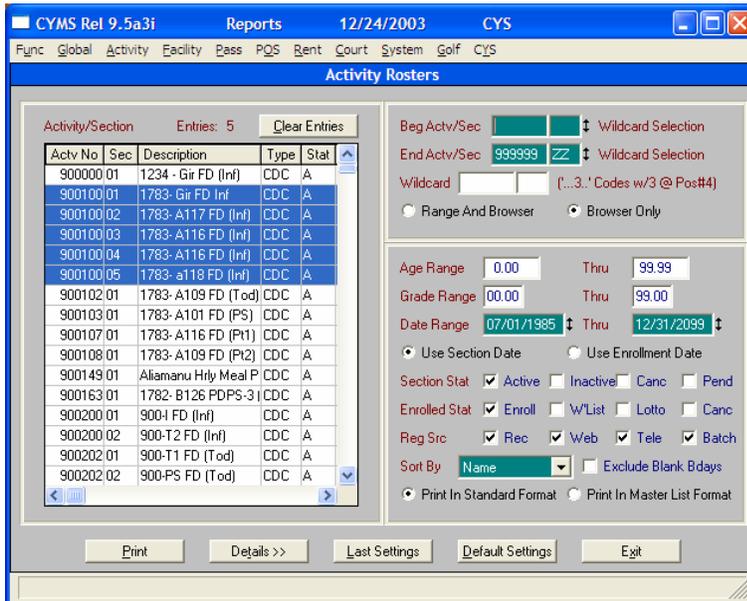
Go to Reports → Activity → Activity Roster Reports → Activity Rosters.

*Hint:* Accept the default for the **Age Range**, **Grade Range**, and **Date Range** fields (0 thru 99.99, 0 thru 19.00, and 07/01/1985 thru 12/31/2099, respectively). Most problems running this report come from changing those ranges.

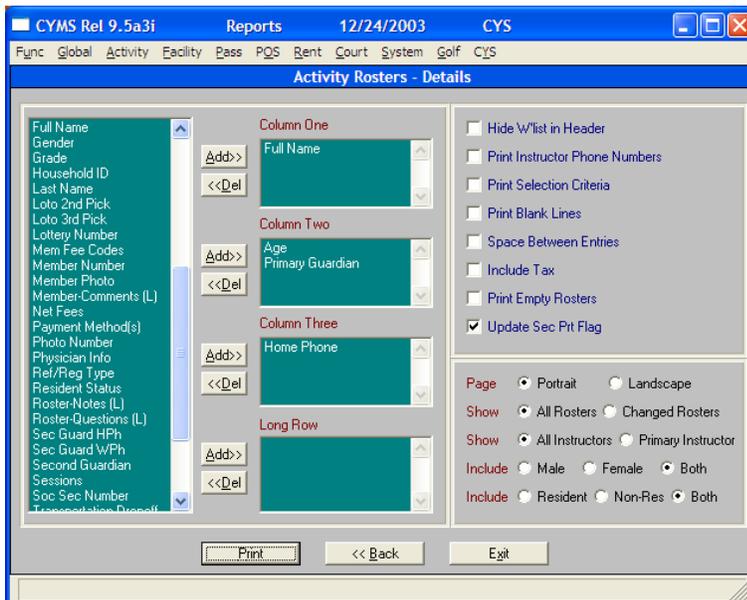
Click **Details>>**. Using the dual selection lists, add or remove print fields from the left selection list that you want to appear in the first, second, and third column. Add only print fields that do NOT end in (L).

Add or remove print fields from the left selection list that you want to appear in the long row. The long row prints below the three columns. Only add print fields that end in (L).

The following screen shots reflects running the report to show children in the infant room:



On the Details screen, select the child's name, age, sponsor (primary guardian) and home phone:



## Class Attendance Worksheet

This report allows you to print Sign In/Out sheets for your classrooms.

Go to Reports → Activity → Activity Instructor Reports → Class Attendance Worksheet.

*Hint:* Make sure CYMS Sign In/Out is selected as the **Roster Checklist Option** and the **Week Starting** date is a Monday. This will print 1 week's worth of attendance boxes. On the Details screen you can select to print the household's work phone.

The following screen shot reflects running the report for one center:

Activity/Section Entries: 9 Clear Entries

Actv No	Sec	Description	Type	Stat
900000	01	1234 - Gir FD (Inf)	CDC	A
900100	01	1783- Gir FD Inf	CDC	A
900100	02	1783- A117 FD (Inf)	CDC	A
900100	03	1783- A116 FD (Inf)	CDC	A
900100	04	1783- A116 FD (Inf)	CDC	A
900100	05	1783- a118 FD (Inf)	CDC	A
900102	01	1783- A109 FD (Tod)	CDC	A
900103	01	1783- A101 FD (PS)	CDC	A
900107	01	1783- A116 FD (Pt1)	CDC	A
900108	01	1783- A109 FD (Pt2)	CDC	A
900149	01	Aliamanu Hrly Meal P	CDC	A
900163	01	1782- B126 PDPS-3	CDC	A
900200	01	900-I FD (Inf)	CDC	A
900200	02	900-T2 FD (Inf)	CDC	A
900202	01	900-T1 FD (Tod)	CDC	A
900202	02	900-PS FD (Tod)	CDC	A

Beg Actv/Sec: [ ] [ ] Wildcard Selection

End Actv/Sec: 999999 [ZZ] Wildcard Selection

Wildcard: [ ] [ ] [...3..' Gets Codes w/3 @ Post#4]

Range And Browser  Browser Only

Week Starting: 12/29/2003

Sort Option:  Last Name  First Name  Entry

Roster Checklist Opt:  Print Attendance Boxes  
 Print Class Numbers  
 Print Signature Line  
 CYMS Sign-In/Out

Print Details >> Last Settings Default Settings Exit

## Pass Reports

### Pass Visit History Report

This report shows visit data for a given date range. It can show visits to your building, a range of buildings, or isolate specific people in your database. This report shows the number of visits, visit length, and any revenue that may have been taken in during that time (hourly fees and late pickups).

Go to Reports → Pass → Visit Reports → Pass Visit History Report.

*Hint.* Typically, this report is run for the user's building.

To run this report for one building, select the Range and Browser option. Leave the **Type** range <blank> thru ////////. Leave the **Pass Number** range 1 thru 999999. Enter the **Date Range** you wish to report on.

Select whether you want a **Detail** or **Summary** report. **Detail** shows who visited and makes the report longer; **Summary** shows the number of visits only.

Click **Details>>**. Right-click in the **Beg/End Visit Location** fields and select your building.

To see how many times a specific child has visited your building, follow the steps above except in the **Pass Number Range**, enter the child's pass number.

The YS might run this report to see how many MST vs. MZZ kids visited their building. To do this, they would isolate the pass type they wish to report on using the Range and Browser or Browser Only option.

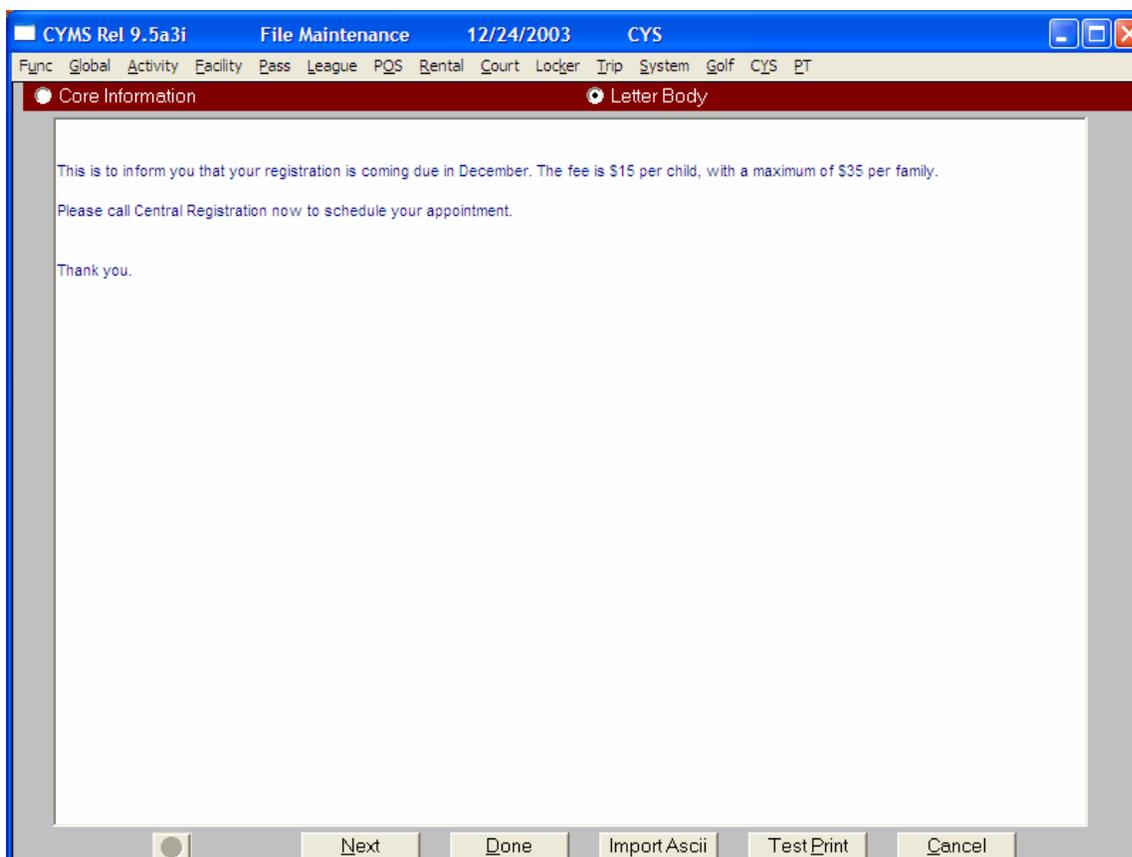
The following screen shot reflects running the report for all visits in the month of December, in detail:

Pass Type	Pass Description	Status	Months	M
CY-CHILD	Child Pass	A	12	
CY-MST	MS/Teen Pass	A	12	
CY-MZZ	YS Privilege	A	12	
CY-SAS	SchoolAge Pass	A	12	

On the Details screen, use the Visit Location range to select 1783:

User Code	Code Description
H-AMR	Aliamanu Military Reservation
H-EWB	Ewa Beach
H-FSH	Fort Shafter Housing
H-HMR	HMR Housing
H-SCH	Scholfield Housing
H-TAM	Tripler Army Medical Center
H-WAA	WAAF Housing
H-MIL	Millani
H-PHA	Pearl Harbor
H-SAL	Salt Lake
H-WAH	Wahiwawa
W-AP	Waipahu
S-HAL	Hale Kula
S-SHA	Shafter Elementary
S-SOL	Solomon Elementary





**Note:** You can make one Re-reg letter instead of twelve (one per month), but don't forget to update the month in the letter body every time.

Go to Reports → Pass → Pass Labels/Letters.

*Hint:* Most people use Pass Labels/Letters to find households that have expiring passes.

On the front screen, consider the **Match Option**—if a household has three kids, all with expiring passes, **All Matches** will generate 3 letters, one for each kid. The **Unique Households** option will only generate one letter.

Select the **Use 'Quick' Member Selection** option.

Click **Details>>**. Depending on who is running this report, central registration or the actual program, make the **Pass Type Range** wide open or isolate your own pass type.

Enter the date range you wish to report on (e.g., 12/01/03 thru 12/31/03 for passes expiring during the month of December).

In the **Date Option** field, select the **Expiration** option to match the date range to the expiration date. Include **Active** passes only.

When you click **Print**, the system will process your selections and bring you to the Options screen.

Regardless of which options you choose, you must click on the corresponding **Options** button (**Label Options**, **Letter Options**, **Report Options**, etc.) for more detailed selections. If you are printing letters, click **Letter Options**. Right-click in the **Letter ID** field and select the letter you created above.

The following screen shots reflect running the labels and letters report for Child passes expiring in December of 2003:

**CYMS Rel 9.5a3i Reports 12/24/2003 CYS**

Func Global Activity Facility Pass League POS Rent Court Lock Trip Accnt System Golf CYS PT

### Pass Labels and Letters

Beg Name    
 End Name    
 Org Rnge    
 Zip List    
 Last Active  (At Household Level)   
 Last Actv Opt  Not Active Since  Active On or After

Use Birthday Range  Use Age Range   
 Age Range  Thru    
 Include Individuals With No Birthdays?

Grade Range  Thru    
 Include Individuals With No Grades?

Vst Dates  Through    
 Visit Count Limit To Check    
 GE 'X' Visits  LT 'X' Visits  Skip Check

Gender Option  Male  Female  Both   
 Resident Option  Resident  Non-Res  Both   
 Sort Option  Name  Zip  Type  Pass   
 Match Option  All Matches  Unique H/H Only

Use 'Quick' Member Selection?   
 Require A Valid Enrollment For Good Match?   
 Include only Passes with Installment Billing?

Process Punch Passes Only?   
 Punch Visits Remaining (Less Than or Equal)

**CYMS Rel 9.5a3i Reports 12/24/2003 CYS**

Func Global Activity Facility Pass League POS Rent Court Lock Trip Accnt System Golf CYS PT

### Pass Labels and Letters - Details

Pass Type Entries: 0    

Pass Type	Pass Description	Status	Months	M
CY-CHILD	Child Pass	A	12	
CY-MST	MS/Teen Pass	A	12	
CY-MZZ	YS Privledge	A	12	
CY-SAS	School-Age Pass	A	12	

Type Range  Thru    
 Wildcard    
 Range and Browser  Browser Only   
 Date Range  Thru    
 Date Option  Membership  Expiration   
 Include  Active  Expired  Suspended   
 Lost  Revoked  Future  Cancelled

Run In Survey Mode? % To Include

User Code Opt  All Matches Req  One Match Req

Available	User Cd	Include
S-HAL	<input type="button" value="Add &gt;&gt;"/>	<input type="text"/>
S-SHA	<input type="button" value="Add &gt;&gt;"/>	<input type="text"/>
S-SOL	<input type="button" value="Add &gt;&gt;"/>	<input type="text"/>
S-WH1	<input type="button" value="Add &gt;&gt;"/>	<input type="text"/>
S-WH2	<input type="button" value="Add &gt;&gt;"/>	<input type="text"/>

Available	User Cd	Exclude
S-HAL	<input type="button" value="Add &gt;&gt;"/>	<input type="text"/>
S-SHA	<input type="button" value="Add &gt;&gt;"/>	<input type="text"/>
S-SOL	<input type="button" value="Add &gt;&gt;"/>	<input type="text"/>
S-WH1	<input type="button" value="Add &gt;&gt;"/>	<input type="text"/>
S-WH2	<input type="button" value="Add &gt;&gt;"/>	<input type="text"/>

## Court Reports

### Court Reservation Report II (CYS)

This report is used to see the hourly reservations that have been made for a given date range. This report is typically run every morning.

Go to Reports → Court → Court Reservation Report II (CYS).

*Hint:* Most centers like to sort by Time so they can see the order in which children should be arriving, earliest to latest. It is recommended that you run this report once for each hourly room, rather than one report for all rooms.

The following screen shot reflects running the report for the hourly infants expected on a particular day:

Fac Type	Fac Loc	Facility ID	Description
HRLY	1783	INF	AMR Hrly Infant
HRLY	1783	PTPS	AMR Hrly PT-PS
HRLY	791	INF	791 Inf Hrly
HRLY	791	PS	791 PSch Hrly
HRLY	791	TOD	791 Tod Hrly

## CYS Reports

### Shot Report

This report is mainly used to identify children who have overdue shots. It can be run for a range of classrooms, homes, or for anyone in the database.

Go to Reports → CYS → CYS General Reports → Shots Report.

*Hint:* This report is typically run for Range and Browser with the Shot Range wide open (<blank> thru ////////).

To list anyone with a shot due in June, the **Due Date** range would be 06/01/04 thru 06/30/04. To list anyone with a shot due any day up until today, the **Due Date** range would be 07/01/1985 thru the current date. To list shots due, run with a **Show** option of Shots Not Done.

Click **Details>>**. On the Details screen, leave the Member range wide open (<blank> thru //////////). Select the **Skip Family Member If Pass Is Expired** and **Skip Family Member if Household is Inactive** options.

To run the report for an Activity Range, select the **Require Class Match Based On Class Range Above** option and choose your **Beginning** and **Ending** class.

**Note:** If running for an Activity range, hourly children will be skipped since they are not enrolled in a program.

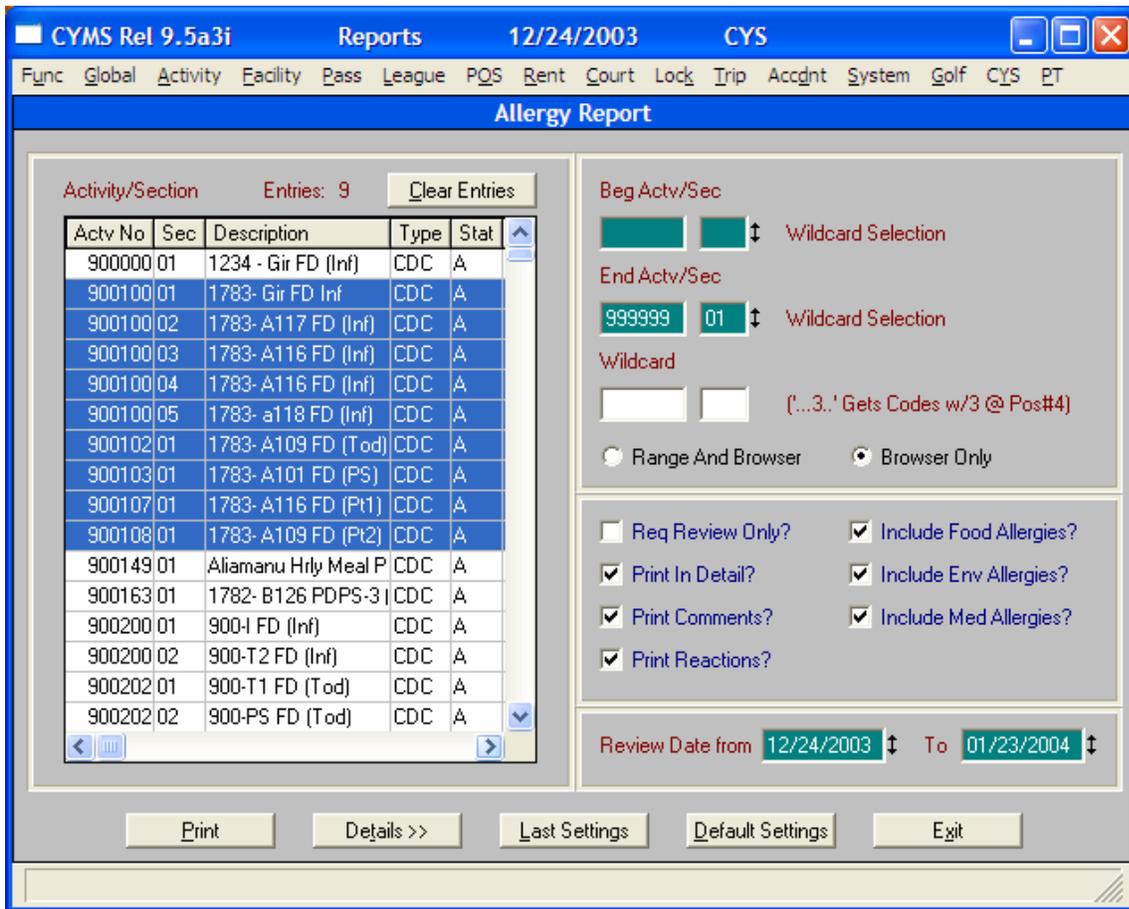
To look at everyone in the database (hourly and children in programs), do NOT select the **Require Class Match Based On Class Range Above** option.

The following screen shots reflect running the report for any shots due through the end of December at one center:

Code	Shot Description	
C-PDX	Chicken Pox/Varicella	N
DTAP 1	DTAP (2 mo)	Y
DTAP 2	DTAP (4 mo)	Y
DTAP 3	DTAP (6 mo)	Y
DTAP 4	DTAP (12-18 mo)	Y
DTAP 5	DTAP (4-6 yr)	Y
HEP-A 1	HEP-A (24 mo optional)	N
HEP-A 2	HEP-A (30 mo optional)	N
HEP-B 1	HEP-B (birth)	Y
HEP-B 2	HEP-B (2 mo)	Y
HEP-B 3	HEP-B (12-15 mo)	Y
HEP-B 4	HEP-B (12 yr optional)	N
HIB 1	HIB (2 mo)	Y
HIB 2	HIB (4 mo)	Y
HIB 3	HIB 3 (6 mo)	Y
HIB 4	HIB (12-15 mo)	Y



The following screen shots reflect running the report for children with any allergy in one center sorted by room:



Details Screen:



### Family Care Plan

This report is used to show who is due to bring you a family care plan. It can also be used to show people who already have a family care plan.

Go to Reports → CY5 → CY5 General Reports → Family Care Plan Report.

*Hint:* To be included in this report, a household **MUST** have the **Family Care Plan Required?** option selected.

If you run this report to show people who are coming due or overdue for a family care plan, the **Family Care Plan Due Date** on the household (Financial Info screen) must fall within the date range entered in the report parameters.

If you run this report for households *with* a family care plan, the **Family Care Plan Received Date** on the household (Financial Info screen) must fall within the date range entered in the report parameters.

Select **Print Households Without a Family Care Plan Due Date?** to show households that may have the **Family Care Plan Required** option selected on the household, but no **Family Care Plan Due Date** entered on the Financial Info screen.

The following screen shot reflects running the report for households that are coming due or past due for a Family Care Plan through 12/31/03:

Begin Plan/Due Date	07/01/1985 ↓	Include	<input type="radio"/> Households with Family Plan?
End Plan/Due Date	12/31/2003 ↓		<input checked="" type="radio"/> Households without Family Plan?
<input checked="" type="checkbox"/> Print Households Without a Family Care Plan Due Date?			

The following screen shot reflects running the report for households whose Family Care Plans were signed during the month of December:

Begin Plan/Due Date	12/01/2003 ↓	Include	<input checked="" type="radio"/> Households with Family Plan?
End Plan/Due Date	12/31/2003 ↓		<input type="radio"/> Households without Family Plan?
<input type="checkbox"/> Print Households Without a Family Care Plan Due Date?			

### Health Assessment/Physical

This report can be run to show children that have health assessments or physicals or to show children with health assessments or physicals that are coming due. The report can be run for a class range or for the entire database.

Go to **Reports → CYS → CYS General Reports → Health Assessment/Physical Report.**

*Hint.* This report only shows data for family member #3 and higher—it doesn't show sponsor and spouse data.

This report should be run every month for a wide-open **Expire Date** range. For example, 1/1/1985 to 7/31/04. On the next month: 1/1/1985 to 8/31/04. Etc.

When the **Only Records with a Date** option is selected, the report will print the children's names whose last health assessment or physical date plus the **Assessment/Physical Good For** days equals a date in the **Expire Date** range. For example, a child's health assessment date is 1/1/03. If the **Expire Date** range on the report is 1/1/85 to 1/31/04 and the **Assessment/Physical Good For** days is 365, this child will be included in the report since he is due for another health assessment on 1/1/04.

Whatever you enter in the **Assessment/Physical Good For** field will be added onto the actual date in the family member's file and compared to the expiration date range.

When the **Only Records with No Date** option is selected, the **Assessment/Physical Good For** field and **Expire Date** range are not used. The report will include anyone without a health assessment or physical date.

Click **Details>>**. On the Details screen, leave the Pass Type range wide open (<blank> thru ////////////////////). Select the **Skip Family Member If Pass Is Expired** option.

To run the report for an Activity Range, select the **Require Class Match Based On Class Range Above?** option and choose your **Beginning** and **Ending Class**.

**Note:** When this report is run for an Activity range, hourly children are skipped since they are not enrolled in a program.

To look at everyone in the database (hourly and children in programs), do NOT select the **Require Class Match Based On Class Range Above?** option.



## Transition Report

This report lists children by age by activity. It helps identify children who may be approaching or beyond the age range for their current activity and are in need of transition.

Go to Reports → CYS → CYS General Reports → Transition Report.

*Hint:* It is best to run this report every month for each category of class from oldest to youngest (school age classes, kindergarten classes, preschool, etc.) since the ability to move an infant to a pre-toddler class is dependent on a pre-toddler slot being created by a pre-toddler having moved to a toddler class, and so on.

*Example 1:* You want to print a report of all the children in toddler rooms who will be in need of transition on or before September 1, 2004.

In the **Future Transition Cutoff Date** field, enter *09/01/2004*. Select the **Include Delinquent Transitions** option. The system will look at the age of every child in the toddler rooms on 9/1/04, compare that to the **Age Range** on the classes' Activity Maintenance Core 2 screen, and report on the children who will be too old for the room. This is a useful tool to identify where your future transitions are going to be.

*Example 2:* You want to print a report of all the children in toddler rooms in need of transition in the months of August and September.

In the **Future Transition Cutoff Date** field, enter *9/30/2004*. In the **Delinquent Transition Cutoff Date** field, enter *8/01/2004*. De-select the **Include Delinquent Transitions** option. The system will look at the age of every child in toddler rooms between 8/1/04 and 9/30/04, compare that to the **Age Range** on the classes' Activity Maintenance Core 2 screen, and report on the children who will be too old for the room.

The following screen shot reflects running the report for infants who will be too old for their classroom as of 12/31/03:

The screenshot shows the 'Transition Report' window in the CYMS Rel 9.5a3i software. The window title is 'CYMS Rel 9.5a3i Reports 12/24/2003 CYS'. The main area is divided into a table on the left and a settings panel on the right.

**Table Data:**

Actv No	Sec	Description	Type	Stat
900000	01	1234 - Gir FD (Inf)	CDC	A
900100	01	1783- Gir FD Inf	CDC	A
900100	02	1783- A117 FD (Inf)	CDC	A
900100	03	1783- A116 FD (Inf)	CDC	A
900100	04	1783- A116 FD (Inf)	CDC	A
900100	05	1783- a118 FD (Inf)	CDC	A
900102	01	1783- A109 FD (Tod)	CDC	A
900103	01	1783- A101 FD (PS)	CDC	A
900107	01	1783- A116 FD (Pt1)	CDC	A
900108	01	1783- A109 FD (Pt2)	CDC	A
900149	01	Aliamanu Hrly Meal P	CDC	A
900163	01	1782- B126 PDPS-3	CDC	A
900200	01	900-I FD (Inf)	CDC	A
900200	02	900-T2 FD (Inf)	CDC	A
900202	01	900-T1 FD (Tod)	CDC	A
900202	02	900-PS FD (Tod)	CDC	A

**Settings Panel:**

- Beg Actv/Sec:** [Green Box] [Green Box] ↓ Wildcard Selection
- End Actv/Sec:** [999999] [ZZ] ↓ Wildcard Selection
- Wildcard:** [ ] [ ] ([...3... Gets Codes w/3 @ Pos#4])
- Range And Browser  Browser Only
- Future Transition Cutoff Date:** [12/31/2003] ↓
- Delinquent Transition Cutoff Date:** [12/24/2003] ↓
- Include Delinquent Transitions?
- Prt Sponsor Details?  Prt Child's Birthday?

Buttons at the bottom: Print, Details >>, Last Settings, Default Settings, Exit.

## Special Needs Labels/Letters

This report can be run many different ways, the most common of which are: To see how many children have special needs; to see how many children are enrolled in the Exceptional Family Member Program; and to see who might be in need of review by the Special Needs Resource Team. This report can be run by pass type.

Go to Reports → CY5 → CY5 General Reports → Special Needs Labels/Letters.

Example:

Child #	Does this child have any 'Special Needs'	Enrolled in 'Exceptional Family Member Program'	SNRT Init Review	Last SNRT Update
1	Yes	Yes	None	None
2	No	Yes	08/01/2002	None
3	No	Yes	None	10/01/02
4	Yes	No	01/01/2001	01/01/02
5	Yes	Yes	01/01/2001	11/01/02

To show children with special needs:

- Select the **Include Fam Members Flagged With 'Special Needs'?** option.
- Select the **Skip Family Members With Expired Passes?** option.
- When you run the report this way, the **As Of Date** and **Good For Days** fields are not used.
- In the above scenario, child 1, 4, and 5 will be included.

To show children that are enrolled in the Exceptional Family Member Program:

- Select the **Include Those In The 'Exceptional F/M Program'?** option. (Selecting this option means the **As Of Date** and **Good For Days** fields are used.)
- Select the **Skip Family Members With Expired Passes?** option.
- Enter a future date of the end of next year for the **As Of Date** and 1 in the **Good For Days** field.
- In the above scenario, child 1, 2, 3, and 5 will be included.

**Note:** The date entered in the **As Of Date** field is the date used by the system to determine if someone should be included. For example, if you enter 90 in the **Good For Days** field, the system will add 90 days to the initial review date or the last review date on the child's file, and compare it to the **As Of Date**. If the initial or last review date plus the good for days is **less** than the **As Of Date**, the child will be included since he is delinquent.

If you run this report with both the **Include Fam Members Flagged With 'Special Needs'?** and **Include Those In The 'Exceptional F/M Program'?** options selected, the child would only need one or the other to be included. In the above scenario, child 1, 2, 3, 4, and 5 would all be included since all of them have at least one or the other selected.

To show kids who might be in need of review by the Special Needs Resource Team as of 8/31/03:

- Select the **Include Those In The 'Exceptional F/M Program'?** option. (Selecting this option means the **As Of Date** and **Good For Days** fields are used.)
- Select the **Skip Family Members With Expired Passes?** option.
- Enter 8/31/03 in the **As Of Date** field and 365 in the **Good for Days** field.
- In the above scenario, child 1 and 2 will be included.
- With 10/31/03 in the **As Of Date** field and 365 in the **Good For Days** field, child 1, 2, and 3 will be included.

*Other fields on the Special Needs Labels and Letters screen*

**Sort:** If you sort by Review Date, the report will show the most delinquent to the least delinquent.

**Skip** (Under the Pass Type Range): With this option selected, children don't need a pass to be listed on the report. This option is typically used in conjunction with the Exclude option on the Details screen. For example, you could skip the pass match requirement, but exclude anyone with an MST pass on the Details screen.

**Include Only People w/o Init or Last Review Dates:** This works in tandem with the **Include Those In The 'Exceptional F/M Program'?** option. If the family member has the **Enrolled in 'Exceptional Family Member Program'** option selected (and the **Include Those In The 'Exceptional F/M Program'?** option is selected on the report screen) but no initial or review date exists, those children will be included.

When both the **Include Those In The 'Exceptional F/M Program'?** and the **Include Only People w/o Init or Last Review Dates** options are selected, the **As of Date** and **Good For Days** fields are ignored.

Note: This report should be run proactively to pick up people who are coming due rather than past due. To do so, enter a future process date (e.g., two months out) so reviews can be scheduled effectively.

### **USDA Statistics Report (Child Statistics)**

This report shows how many family members are Free, Reduced, and Paid. It can be run either for an activity range or for the entire database. To be included in the report, the child must have a valid pass membership; children with expired passes are not included. A Free household with four children will count as 4 Free records on this report.

Go to Reports → CY5 → CY5 General Reports → USDA Statistics Report.

*To run for an activity range*

In the **Location** range, enter *<blank>* thru *ZZZZZ*. Enter the range of classes you want to report on. Select the **Require Class Match Based On Class Range Above?** option. The report will include Free, Reduced, and Paid totals on the kids enrolled in the class range. Two children in the same activity from the same Free household would count as two Free records.

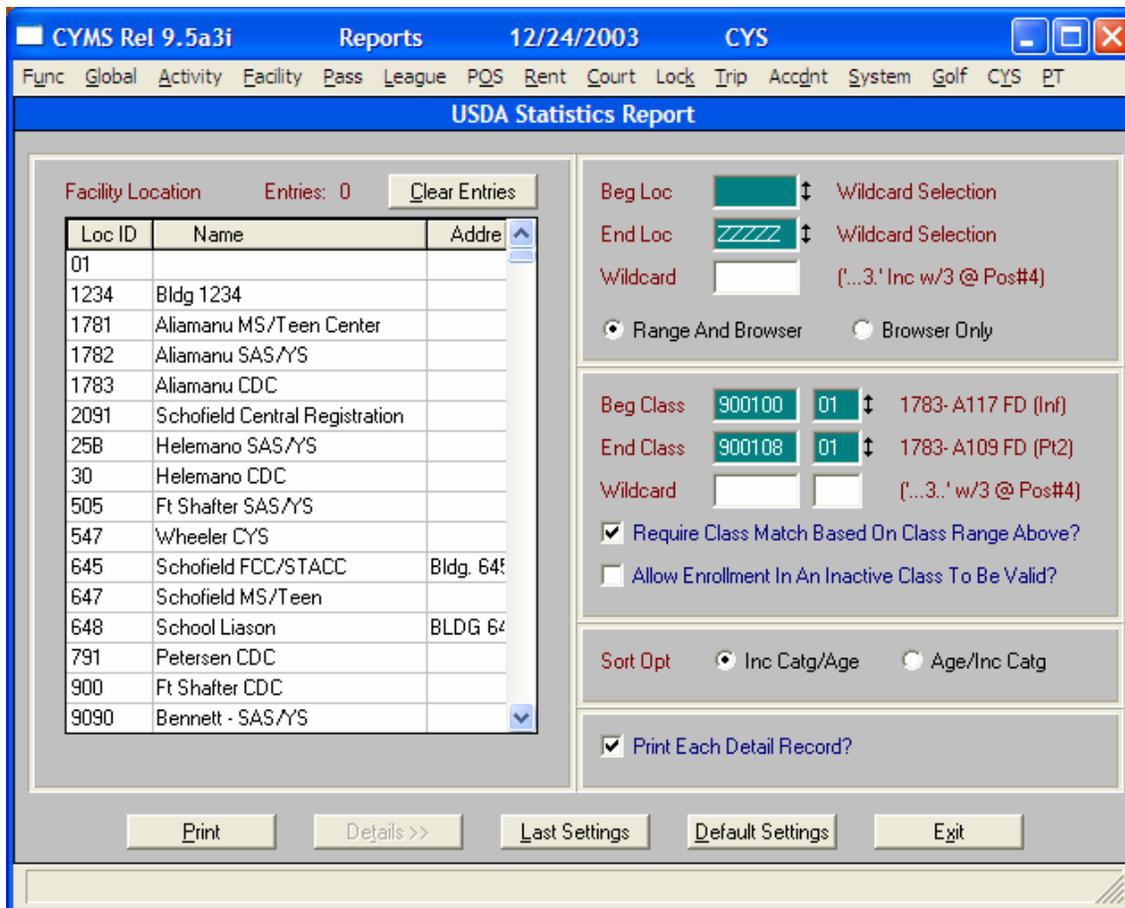
*To run for the entire database*

In the **Location** range, enter *<blank>* thru *ZZZZZ*. De-select the **Require Class Match Based On Class Range Above?** option. The report will include Free, Reduced, and Paid totals for everyone in the database that has a valid pass. A Free household with 4 children will count as 4 Free records.

Selecting the **Print Each Detail Record** option will show the name of each included child. De-selecting this option will show only Free, Reduced, and Paid totals for your selection criteria.

**Sort Option:** Select whether you wish to sort the report by USDA income category or by the children's age.

The following screen shot reflects running the report for one center in detail:



### USDA Status Report (Household Statistics)

This report is similar to the USDA Statistics Report, but shows how many *households* are Free, Reduced, and Paid. It can be run either for an activity range or for the entire database. Since this report counts households, valid pass memberships are not required.

Go to Reports → CYS → CYS General Reports → USDA Status Report.

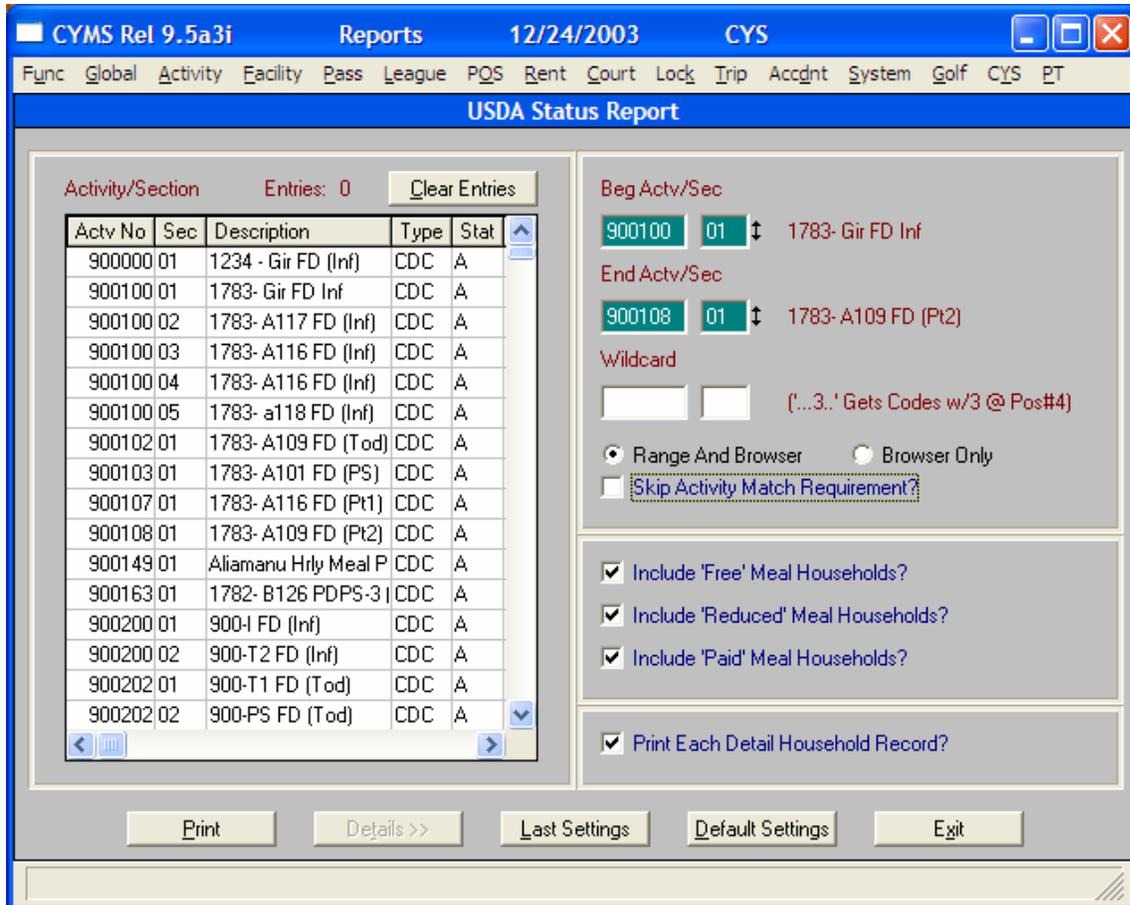
#### To run for an activity range

In the **Location** range, enter *<blank>* thru *ZZZZZ*. Enter the range of classes you want to report on. Deselect the **Skip Activity Match Requirement** option. The report will include Free, Reduced, and Paid totals on the households enrolled in the class range. Two children in the same activity from the same Free household will count as one Free record.

#### To run for the entire database

In the **Location** range, enter *<blank>* thru *ZZZZZ*. Select the **Skip Activity Match Requirement?** option. The report will include Free, Reduced, and Paid totals for **all** the households in the database regardless of whether they have a valid pass membership. A Free household with two children will count as one Free record.

The following screen shot reflects running the report for one center in detail:



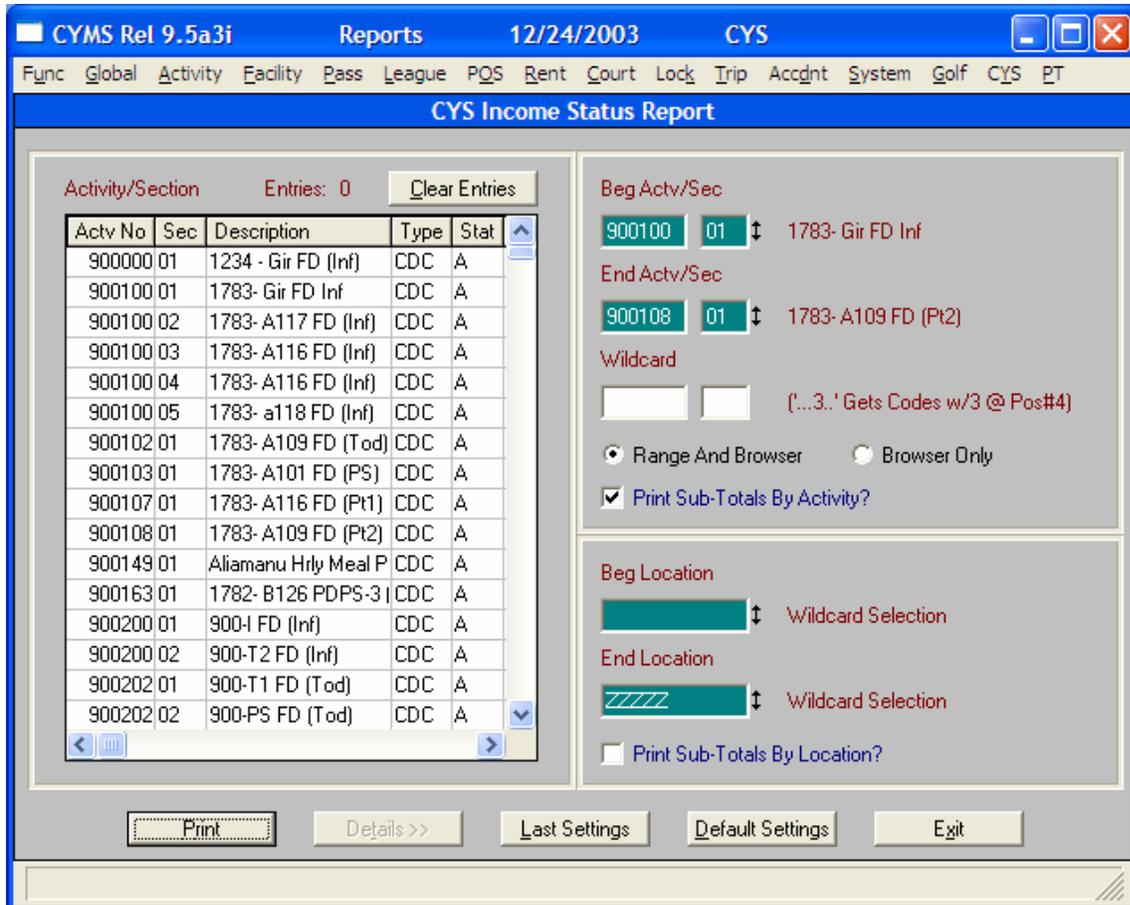
### Income Status Report

This report can be run for an activity range to show how many Cat I households there are vs. Cat II households, etc.

Go to Reports → CYS → CYS CDC Reports → Income Status Report

*Hint:* When running this report, select the **Print Sub-Totals By Activity?** option. De-select the **Print Sub-Totals By Location?** option. The most valuable portion of this report is at the bottom where it totals how many Cat 1–6 family members and households there are in the activity range.

The following screen shot reflects running the report for one center:



### Facility Usage Report

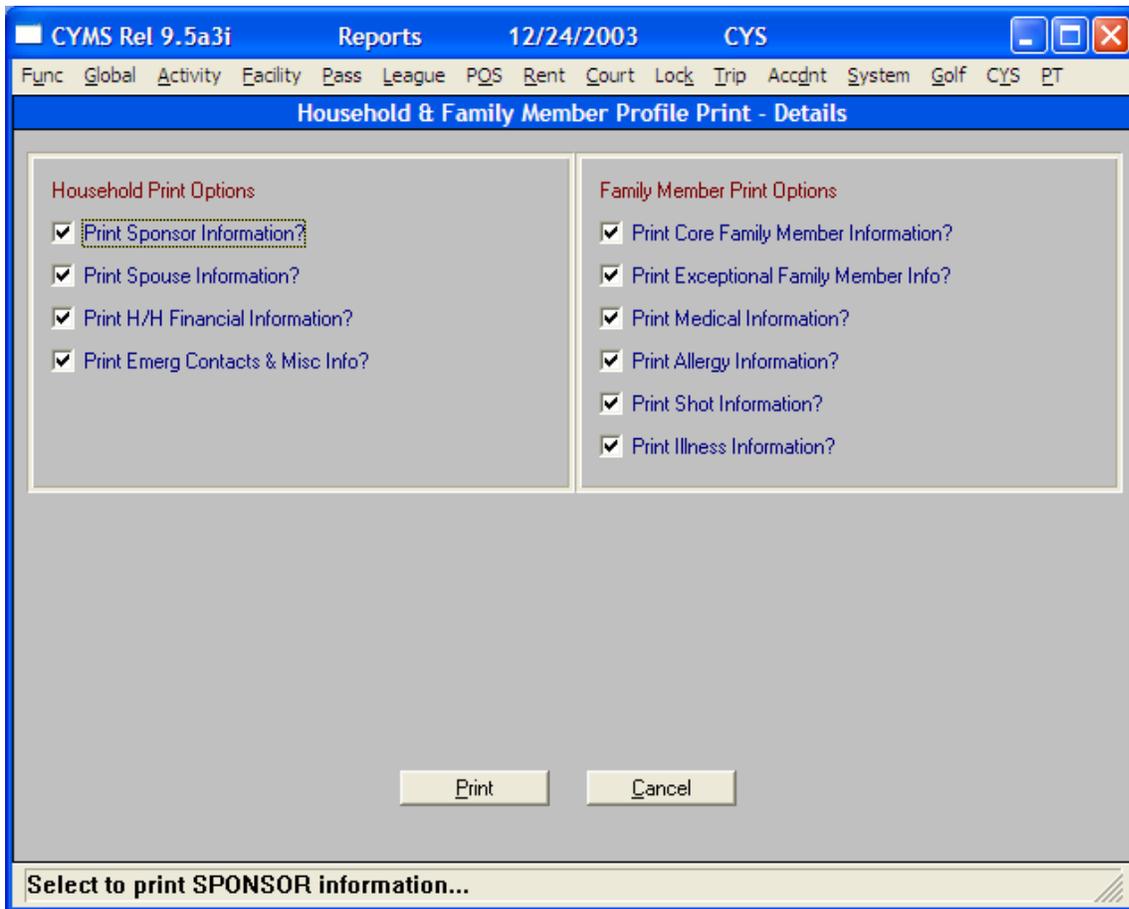
This report is used to show how many males and females visited a particular location broken down by sponsor status (M-Active, M-Guard, etc).

Go to Reports → CYS → CYS General Reports → Facility Visit Usage Report.

*Hint:* Visits will be counted as unique visits per day. For example, a child with two visits in the **same** day will be counted once. A child with one visit yesterday and one visit today will be counted twice as long as the date range includes both days.



The following screen shot reflects running the report for a child for all the major household and family member screens:



Profiles can also be printed from the HH Inquiry, Family Member Listing screen.

To print profiles by an activity range, go to Reports → System → Other Reports and Listings → HH/FM Profile Print.

### Bill/Tran Code Revenue II Report

This report is used to show how much revenue you have made for a given date range for particular bill or tran codes. Since Center 1 would have different bill codes than Center 2, it is possible to target one center's revenue or even one center's full or part day revenue.

Go to Reports → System → System Financial Reports → Bill/Tran Code Revenue Report II.

*Beware:* Since you **cannot** restrict by payment type, this report will show money that was paid in as vacation credits, customer discounts, agency payments, etc. as revenue.

*Hint:* The Details screen is only relevant if running the report for Pass or Tran Code related revenue.

The following screen shot reflects running the report to show one center's full day and full day late revenue for one year:

