

CMS DATA ENTRY INSTRUCTIONS

How to Navigate CMS

This document explains how to navigate to various pages in CMS and describes the functions of all buttons in CMS.

1

Logging In

> www.contracts.dcyf.org

Agency-level accounts arrive at the list of the agency's DCYF-funded programs

Program-level accounts arrive at the dashboard for the program to which their account belongs

2

Left Hand Menu

Always available no matter where you are in the CMS. Use this menu to navigate between the different sections of the CMS by clicking on the tab you wish to go to. Tabs include:



Program Dashboards

View your program's data



Agency Profile

View information about your agency profile and contracts



Workplans

Enter and view Workplan information



Invoices

Enter and submit monthly invoices



Activities

Create activities and take attendance



Reports

Run reports about program activities and participants



Resources

Access resources and information about CMS and upload documents here



User Account Control Panel

View user accounts

Anyone with an **Agency-Level Account** can use this tab to manage and create new user accounts

3

Navigating Workplans and Invoicing



Navigate between pages of the **Workplan** with the subheaders under the Workplan tab in the left hand menu or through the links in the Workplan Overview, the first page in the Workplan section.



Navigate between the different months for **invoicing** using the Invoices Overview page. This page lists the current month at the top and previous months below it. To access a specific page of a submitted invoice, click the "plus" button located on the right side, which shows the individual pages of the invoice and the Full Report & Invoice PDF. Click the "minus" button to collapse.

4

Navigating between different fiscal years

CMS defaults to the current fiscal year, but it is possible to change the fiscal year so you can view your program's data from previous years.



The **Activities** and **Participants & Staff** pages contain a fiscal year filter at the top of the page where you can select a different fiscal year.



To view Workplans from previous fiscal years, the Workplan Overview page has a section called **Previous Year Workplans** at the bottom.



Invoices from previous fiscal years can be accessed from a dropdown menu in the Workplan Overview page.

Invoice data from fiscal years prior to FY18-19 will NOT be available in the system.

5 CMS Buttons and their Functions



Every data entry page in CMS (e.g. Workplan information, invoice information, attendance data, participant record data) has the following buttons:

At the Overview level:

The PDF button for each page generates a downloadable and printable copy of that page in PDF



At the top of the page:

BACK button

Takes you to the previous page you were on



SAVE button

Saves your work



SUBMIT button

Submits the page for Program Specialist approval (Workplan and Invoice pages) or submits new data on Participant Records or Activities into the CMS

UNLOCK button

Appears after form has been submitted; allows you to edit a submitted form (please note that after submitting the Sign and Submit form you cannot unlock a form)



On the right side of the page (scrolls with you):

SAVE button

Saves your work




TOP button

Takes you to the top of the page



In each section:

COLLAPSE button

Collapses the section so that you can view only the sections most relevant to you. Once collapsed, this button will become a  which you can use to expand the section



DELETE button

Deletes the data you just entered (will delete data you saved)



ADD button

Adds an additional field to enter data (e.g. additional staff on the Budget page of the Workplan)



INFO icon

Hover over this icon for additional information about the section or field you are in

