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2018 Annual Report for Boys & Girls Clubs of America

The Boys & Girls Clubs of America's Annual Report has been created in the Member Tracking System to be quick and easy for your end of year numbers.

NOTE: This report will be accurate if **ALL** Date of Birth, Ethnicity, Gender, attendance and demographic records are up to date for all members, staff and volunteers.

Page 3-4 ORGANIZATION STAFF INFORMATION and ORGANIZATION VOLUNTEERS

This information can be pulled if all of your staff and volunteers have been entered into the Member Tracking System.
1. On the Main menu click on Reports
2. Click on the Staff tab
3. Click on the Staff/Volunteer Age/Ethnicity/Gender Report
4. Click the Open Staff Filter button at the top right
5. In the Employment Type section choose Staff Only for Staff
6. In the Staff/Volunteer Time Frame Selection on the top right, choose Employment Dates and fill in between 1-1-18 and 12-31-18
7. In the Units tab, choose the appropriate Unit
8. In the Positions tab, choose the types for 'Management Staff'
9. In the Groups tab, choose Don't use staff groups or Only include members of selected groups – Groups can be used for Full Time and Part Time
10. Click Run the Filter at the bottom
11. Preview and Print this information
12. Run the report again, but on the Open Staff Filter, choose 'Youth Development/Program Staff'
13. Preview and Print this information
14. Repeat, but on the Open Staff Filter, choose 'Volunteers'
15. Preview and Print this information

Pages 12 through 18 of the Annual Report for Membership Information
1. Click on Reports from the Main Menu of the Member Tracking System
2. Click on the Organization/Unit tab at the top of the screen
3. Click on the Boys & Girls Clubs of America Annual Report button on the bottom center
4. On the Universal Selection Engine choose Enrolled at least 1 day between 1-1-18 and 12-31-18.
5. This will include all members who have/had an enrollment in 2018. Please click the **Example** button to read the rule for Enrolled.
6. If you are a multi-unit organization, please click on Members' Unit checkbox on the bottom left and select one unit. Do NOT fill in the As Of Date.
7. Click on Continue
   a. You might receive a message *'Please re-link to your SQL Server.*
   b. Click OK, then click the Link button at the bottom of the screen.
   c. At the *'Relinking of Data complete.'* Message, click OK.
8. The Annual Report Information screen explains that this report is pulling your data for CALENDAR year 2018 and describes several Maintenance Activities that should be run before

running the Annual Report. Click Continue if you have run these Activities. Please see the last section of this document for the Maintenance Activities to run.

9. Click Continue on the Information screen.
10. You will be asked '*Do you wish to do the 2018 Report Year?*' Answer Yes. NOTE this will only appear the first time you open the report.
11. If you answered Yes on the above question you will see 2018 as the Report Format Year in the top left which will coincide with Boys & Girls Club of America 2018 report.
12. The Use Data from Calendar Year will automatically fill in for 2018.
13. Fill in a report sub-title if you want such as the Unit you are running for the report
14. Fill in your Summer Session Dates – PLEASE NOTE: This is the Summer Dates ONLY – NOT the entire calendar year.
15. Fill in the date of 12/31/2018 for Date sensitive data on this report calculated as of. NOTE: Age, Fee Levels, Single Parents, Military Information are date sensitive and the report will show different numbers based on this date.
16. Match all Ethnicities in the Ethnicity Conversion Table – the left column are your organization's ethnicities and the right side are the standard ethnicities that are required for Boys & Girls Clubs of America. Click on the blank line to see the dropdown selections.
17. Click on the National Programs Conversion Table tab and match all of your Club Programs on the left to a National Program on the right. NOTE: you will only see Club Programs that were scheduled in 2018 in the list.
    a. Check the box of "Meal" next to any program that served a meal.
    b. Check the box of "Snack" next to any program that served a snack.
    c. Check the box of "Family+" next to any program related to Family Plus.
    d. Check the box of "Comm-Svc" for any program that was Community Service based.
    e. Check the box of "PC-Use" for any program where members used computers.
18. Click on the Fees tab and select the Fees used for Free/Reduced Lunches. This field (Fee Level) is found on the main Members form, bottom left corner near schools and is DATE SENSITIVE. Data must be filled in before 12-31-18 in order for this number to be accurate as of 12-31-18.
19. Click on Continue to proceed
20. You may be warned about missing Dates of Birth. We strongly recommend that you enter in this information.
21. The Help tab will give you additional information on running the BGCA Annual Report.
22. You can click on Re-Calculate All Pages to have all numbers automatically calculated for all pages OR click on each Page tab at the top to calculate individually using the Re-Calculate Page X button in the lower left hand corner.
23. During calculation, your screen will be red, then yellow and then white when your numbers are complete. You will also get a message stating that the recalculation is complete. This may take several minutes to calculate. Please leave your computer alone until it is complete.
24. Click on Preview or Print.

NOTE: You can view a list of your members that are included in a particular section, by clicking on that specific cell. You can also print a hardcopy of these members.

NOTE: Please review the data cleanup those routines below.

Maintenance Activities

1. **Find and Fix Missing Data**
   Click on Procedures, Member-Specific Tools tab, Find and Fix Missing Member Data, On the Universal Selection Engine – choose the same Enrolled at Least One Day and click Continue.
   a. Choose the Data Groups for DOB and Age Groups, uncheck the Age Groups box and fill in any missing DOBs.
   b. Choose Ethnicity, Gender, Religion, SSN, uncheck the Religion and SSN boxes and fill in any missing data.
   c. Choose Income & Fee Level, uncheck Income Level and fill in any missing Fee Levels (eligibility for Free or Reduced Lunch at school). This information is date sensitive and should be updated before the end of each year.
   d. Choose Membership and verify that everyone has all the information. If the screen is blank then all your data is filled in.
   e. Choose Household, uncheck all boxes except 1-Parent HH and fill in any missing data. This information is date sensitive and should be updated before the end of each year.
   f. Choose Military and fill in Branch and Lives On Base. This information is date sensitive and should be updated before the end of each year.
2. **Find and Fix Missing Staff Data**
   Click the Staff-Specific Tools tab and follow the same steps.
3. **Duplicate Members Report**
   Reports, Members 3 tab, Continue on the Universal Selection Engine, Choose Member Name, Unit, Date of Birth and Primary Phone to show on the report then Choose Last Name, First Initial and Date of Birth to check for duplicates, Preview and Print the list.
4. **Consolidate Households and People**
   If there are duplicates in #3 above, then, click on Procedures, Member-Specific Tools tab, Consolidate Households and follow the instructions on the screen, then click on the Consolidate Household Occupants button on the bottom and follow the instructions on that screen
5. **Delete Unattended Sessions**
   Do this procedure after ALL attendance has been entered. Click on Activities from the Main Menu. Click Delete Unattended Sessions. Enter Date Range from 1/1/17 – 12/31/17. Click on Delete Unattended Sessions at bottom of screen. Click Yes. Click Ok.
6. **Repair/Resolve Household Occupant Records**
   The purpose of this procedure is to review and clean up any erroneous dates for Household Stat and Household Occupant records which include the following data fields: Address, City, State, Zip, Annual Income Level, Member of Household over 65, Member of Household Handicapped, Head of Household, Housing/Community, Single Parent, Number in Household, Number in Household Under 18, Military Branch and Lives on Military Base. There could be overlapping dates, numerous records with no end date or multiple records both having an end date. These issues can make members appear in dropdowns and on reports multiple times or not at all.
   a. From the Main Menu click Procedures
   b. Click the MTS Maintenance tab at the top
   c. Click the Repair/Resolve Household Occupant Records on the left
   d. Click the Resolve/Repair Household Occupant Records button on the bottom left
   e. It will run and then click OK when finished
   f. Click the Resolve/Repair Household Stat Records button on the bottom right
   g. It will run and then click OK when finished