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How to Re-Enroll Members in Member Tracking

Re-enroll your members for a new program year. It is very important to review all the members' data when re-enrolling them to make sure all the data is up to date. Items such as School, School Grade, Fee Level, Contacts and their phone numbers should be updated each time you re-enroll a member for accurate reporting and safety.

1. Click on the Members button on the Main Menu.
2. Type in the person's last name in the "Find" box and press enter to locate the member you wish to re-enroll.
3. Click on the View/Update Enrollment History button on the right side of the Members form and read the blue instructions on the screen.
4. Type in the new Entry Date and Expiration Date on the first empty line (Expiration Date will automatically fill in based on the Expiration Date Calculation Method chosen in Unit Information on the Main Menu).
5. Click on the box for Member Type and choose a Type from the dropdown.
6. Information in the "New/Renewal" and "Unit Code" fields will update automatically.
7. Click on the Close button to complete the new enrollment period.
8. The Members Status will update automatically to Active once you have given the member a new enrollment period if that feature is turned on – SEE BELOW to enable Automatic Change Member Status.
9. Your member has now been re-enrolled.
10. Make any other changes on the Member's screen that are applicable from their new membership form. NOTE it is **HIGHLY RECOMMENDED** that ALL items such as new school, school grade, phone numbers, emergency contacts, etc. be reviewed and updated at this time.

DO NOT delete previous entries and **DO NOT** simply change the Expiration Date. Each new enrollment period should have its own line on this screen.

NOTE: We do not recommend deleting or purging old members. If they are deleted from the system, any reports for past date ranges will not be accurate.

AUTOMATICALLY CHANGE MEMBER STATUS:

1. Click on Local/Station Settings button on the Main Menu.
2. Click on the Local Settings tab.
3. Turn on the checkmark for When a membership expires, change:
4. Select From status: Active from the dropdown.
5. Select To status: Non-Active from the dropdown.
6. Turn on the checkmark for When a member re-enrolls, change:
7. Select From status: Non-Active from the dropdown.
8. Select To status: Active from the dropdown.
9. Click the Close button.