

Find and Fix Missing Data

Some of your members may have been keyed in and have missing information. The Find and Fix tool will let you easily fill the missing information in your program.

- 1. Click on Procedures from the Main Menu of the Member Tracking System
- 2. Click on the Member-Specific Tools tab at the top of the screen
- 3. Click on the Find and Fix Missing Member Data button NOTE: This procedure is also available for missing staff data
- 4. On the Universal Selection Engine choose the people that you would like to cleanup. A few Examples are listed below:
 - a. <u>All Members</u> leave the Time Frame selection on All Members in the system
 - b. <u>Active Members</u> click on the Membership Status checkbox on the left and then choose Active on the right
 - c. <u>Members that have Attended</u> choose the Attended any Activity at Least one Day between __/__/___ and __/__/___
 - d. <u>Members from a single School</u> click on the School checkbox on the left and then choose a school or schools on the right
- 5. Once you make your choices from the Universal Selection Engine, click Continue
- 6. On the Find and Fix screen you will be able to fix data for those members you have selected
- 7. In the Data Group dropdown, select the data you want to review and cleanup In this example the Data Group is Address and there are 9 out of 82 members who are missing all or part of the address data. You can look it up and fill in the blanks here.

😑 Find and F	3 Find and Fix Missing Data										
82 members are currently selected. Click on U.S.E. to refine your search.				U.S.E.	Check for missing:	⊽ Street Add	ress, City,	State or Zip	County		
Data Group: Address											
 Show (and edit) Members only from Units you can Modify Show (but not edit) members in all Units you can View 				Remove Sort							
⊿ Unit 🗸	Member Name 🗸	Member -		Add	ress .	City -	ST 🗸	Zip			
01	Akron, Karen	76									
01	Anderson, Eric	71				Clearwater	FL	33701			
01	Dorner, Eric	75					FL				
01	Dover, Eric	77					FL				
01	Gregory, Freddy	24	123 Sou	th 19th Av	enue	Clearwater	FL				
01	Hilden, Greg	78									
01	James, Brandon	32				Clearwater	FL	33765			
01	James, Ernest	33				Clearwater	FL	33765			
01	Smith, Michelle	63									
Record: M	< 1 of 9 ► ► ► ► ₩ ► ₩ ₩ № No	Filter Search	1								
Email Hardcopy Preview Hardcopy Print Hardcopy Grouping Tool Email Hardcopy Close to Main Menu											

- 8. A list will appear with all members that are missing data in your chosen data group
- 9. If no list appears, that means that there is no missing data in that group

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😑 Find and Fix Missing Data			23						
82 members are currently selected. Click on U.S.E. U.S.E. Check for missing: IF Status IF Type IF Exp. Date IF New/Renewal IF Exp. Date									
Data Group: Membership	~								
Image: Show (and edit) Members only from Units you can Modify Remove Image: Show (but not edit) members in all Units you can View Sort									
🖂 Cur. 🖃 Member Name 📼 I	Memb - Status - Entry Date-	Exp Date - Type -	New/Rene - Enr. Unit -						

10. When your list appears, you may see checkmarks across the top that you can turn on or off certain fields that you may not track

🔄 Find and Fix Missing Data							
82 members are currently selected. Click on U.S.E. to refine your search.	U.S.E. Check for missing:		I⊽ 65+ I⊽ Handicapped	I⊽ # in HH I⊽ # < 18 years old			
Data Group: Household	~		✓ Head Of Household ✓ 1-Parent HH	Community			

- 11. For each member that is missing data, click in the empty box next to their name and fill in the missing data this will populate the data in the members record and they will not appear on this list again
- 12. If you don't know the answers then you can print a hardcopy of the list then gather the data and come back later to fill it in

Missing data can be entered for: Addresses Date of Birth and Age Groups Ethnicity, Gender, Religion and Social Security Number Income and Fee Level Membership - Member Status, Member Type, Entry Date, Expiration Date, New/Renew and Unit Phone and Phone Type School, Teacher, Grade, Expected Graduation Year Lives With: Mom, Dad, Grandparents, Step parents, Foster parents, Other Household: Over 65, Handicapped, Head of Household, Single Parent, # in Household, # in Household Under 18, Housing Community Doctor and Doctor Phone Contact Occupation/Employer Military – Branch, Lives on Base Custom Fields - any Custom Fields that have been created in Organization Information Member and Contact email addresses Contact DOB, SSN, Marital Status