



# Vision Computer Programming Services, Inc.

801 2<sup>nd</sup> Street North, Suite A Safety Harbor, FL 34695

888-425-6964 [email@visioncps.com](mailto:email@visioncps.com)

[www.visioncps.com](http://www.visioncps.com)

## Data Cleanup for members who attended but are not enrolled

Member Search

Unit: (All)  (Open USE)  (Close USE)  USE OFF  Immediately jump to member if only 1 found after search

Active Only 90 members being considered!

Members Contacts

Sort by Mbr Name Last Viewed

Sort by Mbr#

Clear Sort Configure

Member Name	Unit	Gndr	Age	Grd	Membr #	Status	Member Address	City	Stat	Zip	Exp Dt
Aaron, Brandy	01	F	11	6	1	Active	2876 Darlington Lane	Clearwater	FL	33766	06/05/20
Aaron, Greg	01	M	9	4	2	Active	2876 Darlington Lane	Clearwater	FL	33766	06/05/20
Aaron, Theresa	01	F	17	11	3	Active	2876 Darlington Lane	Clearwater	FL	33766	06/05/20
Adams, Barabara	01	F	10	5	4	Active	2876 Darlington Lane	Clearwater	FL	33766	06/05/20
Alexander, John	02	M	10	5	2	Active	51685 96th St N	St Petersburg	FL	34695	06/05/20
Anderson, Eric	01	M	10	5	71	Active	649 Saltwater Circle	Clearwater	FL	33701	06/05/20
Archer, Ernie	01	M	10	5	5	Active	2154 Breton View Lane	Clearwater	FL	33767	06/05/20
Archer, Stephen	01	M	11	6	6	Active	2154 Breton View Lane	Clearwater	FL	33767	08/15/19
Arsco, Ryan	01	M	6	1	81	Active	459 First Street North	Clearwater	FL	33701	06/07/20
Avila, Marcos	01	M	17	11	7	Active	45 5th Ave. N.	Clearwater	FL	33767	06/05/20
Bighorn, Jacob	01	M	8	3	8	Active	2020 Yearn Trail	Clearwater	FL	33701	06/05/20
Bradley, Jessica	01	F	10	5	72	Active	432 Jamison St	Clearwater	FL	33765	06/05/20
Brown, Donna	01	F	11	6	9	Active	1601 Manchester Blvd	Tampa	FL	34602	06/05/20
Brown, Jada	01	F	12	7	10	Active	1601 Manchester Blvd	Tampa	FL	34602	06/05/20
Brown, John	01	M	12	6	11	Active	1601 Manchester Blvd	Tampa	FL	34602	06/05/20
Close, Davie	01	F	13	7	12	Active	541 E. Britian Way	Tampa	FL	33702	06/05/20
Close, Gideon	01	M	11	5	13	Active	541 E. Britian Way	Tampa	FL	33702	06/05/20

Record: 1 of 90 Unfiltered Search

When opening the Members form from Main Menu...  
 Show this form to Search for Members  
 Open to the 'Quick Find' field on the Members form

Try these Search Examples:  
• Smith  
• John  
• Smi, Jo (or) Jo/Smi  
• 42 (or) 42/

Export to Excel New Member Close

Member ID Card

On the Member Search screen, click Open USE button

Universal Selection Engine - Selects People

All Members in the System

Individual Member Last, First:  Memb #:   Active Only

Attended  Any 'Club Attendance' Activity at least  day(s)  
between: 11/02/2020 and: 11/06/2020 Example Set Rules

Enrolled at least one day  
between: 07/01/2019 and: 07/01/2020 Example

Latest  Entry Date  
between: 08/12/2020 and: 08/20/2020 Example

Latest  Expiration Date  
between: 01/01/2000 and: 12/31/2019 Example

Enrolled OR Attended at least one day ('Club Attendance' Activity) using 'Set Rules' above  
between: 06/01/2020 and: 06/30/2020 Example

All Members Currently Present (signed In to but not Out of any In/Out Activity for today)

Reset Grouping Tools ? Mark None Mark All Count Continue Cancel

Select a Report Member Form

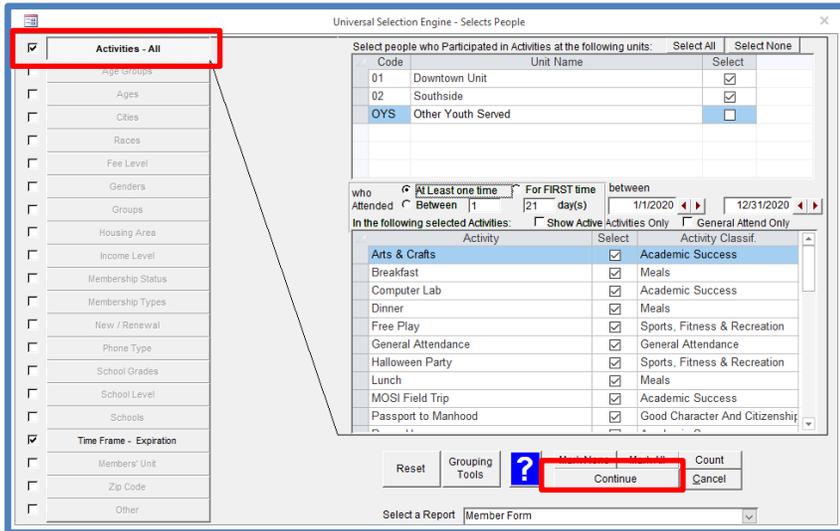
Time Frame = Latest Expiration Date 1/1/2000 to 12/31/2019 for the 2020 Annual Report

This selects all members where their membership ended prior to the reporting year.

To pull this report at the end of each month during the year, you would use Latest Expiration date for the prior month.

EXAMPLE: On 9/1/2020 use Expired between 1/1/2000 to 8/31/2020.

EXAMPLE: On 10/1/2020 use Expired between 1/1/2000 to 9/30/2020.



Click Activities in the top left – choose all Units – who Attended At Least one time between 1/1/2020 and 12/31/2020 and click Continue. This selects members who have attended in the reporting year.

To pull this report at the end of each month during the year, you would use dates for attendance for the current month.

EXAMPLE: On 9/1/2020 use Attended 8/1/2020 to 8/31/2020.

EXAMPLE: On 10/1/2020 use Attended 9/1/2020 to 9/30/2020.

In our example, these 5 members above have expiration date on or before 12/31/2019 and have attended since that date. Double click to choose the first member.

Member Search

Unit: {All} Open USE Close USE USE On  Immediately jump to member if only 1 found after search

Active Only 14 members being considered! Members Contacts

Sort by Mbr Name Last Viewed

Sort by Mbr#

Clear Sort Configure

Clear Search For: Refresh in Name Address Phone Member #

Member Name	Unit	Gndr	Age	Grd	Memb#	Status	Exp Dt	Member Address	City	State	Zip	Primary Phor
Grey, Kevin	01	M	14	8	25	Non-Active	12/31/19	327 Dutcher Ave	Clearwater	FL	33764	(727) 752-9966
Grey, Nellie	01	F	17	11	26	Non-Active	12/31/19	327 Dutcher Ave	Clearwater	FL	33764	(727) 752-9966
Harris, Jean	01	F	18	11	27	Non-Active	12/31/19	437 Ramos Drive	Clearwater	FL	33764	(727) 752-6899
Harris, Will	01	M	15	9	29	Non-Active	12/31/19	437 Ramos Drive	Clearwater	FL	33764	(727) 752-6899
Jacobs, Bob	01	M	16	10	31	Non-Active	12/31/19	123 South St	Anytown	FL	12345	(123) 123-1234

Members

Unit: 01 **Nellie Grey - 26** Status: Non-Active Type: Regular

Quick Find: Last Name, First Last Viewed

Guidance/Accidents/Mentoring Member Stars Charges / Payments Misc. Academics Medications Notes/Msgs QE Feedback

Member Info Contacts Medical General Household Custom Photo Outcome Measurement/Surveys Calendars / Activities Groups

First Name: Nellie Middle: Last: Grey Suffix:

Gender: F Race: Caucasian Ethnicity: Not Hispanic/Latino DOB: 03/01/2003 Age: 17.72 SSN: Membership #: 26 Calc

Residing at the: Grey Household

Address: 327 Dutcher Ave City: Clearwater State: FL Zip: 33764 County: Validate Address

This Member DOES require a P/G Pickup

Expected H.S. Graduation Year:

This phone area is for MEMBER'S PRIMARY # - ALL Contact phone info is entered on the Contacts tab

Phone/Fax/Emails	Type	Primary	Pref. Email
(727) 752-9966	Home	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Entry: 01/01/2019 Expiration: 12/31/2019

Type: Regular Renewal

Show Current (or most recent if not available) Show Future (or most recent if not available)

View/Update Enrollment History

Processed By: ND Member ID Card Needed

Last Member ID Card Issued on:

New Member Delete Member Change Member Name Move Member Member History Hardcopy Member ID Card Member Info Return to Search Close to Main Menu

Click on the Calendars / Activities tab to see the attendance. Click the Activity dropdown to find all attendance in the range where there was no enrollment. NOTE that the attendance may not be just General Attendance.

Members

Unit: 01 **Nellie Grey - 26** Status: Non-Active Type: Regular

Quick Find: Last Name, First Last Viewed

Guidance/Accidents/Mentoring Member Stars Charges / Payments Misc. Academics Medications Notes/Msgs QE Feedback

Member Info Contacts Medical General Household Custom Photo Outcome Measurement/Surveys Calendars / Activities Groups

Attendance at Unit: 01 Activity: General Attendance Participating As: Member

Click on the Activity dropdown to review attendance for any other activity the member has attended including field trips, snacks or meals.

Double click on any x for more info for that day.

NOTE: We recommend that all activity attendance be entered thru the Quick Entry screen from the Main Menu

New Member Delete Member Change Member Name Move Member Member History Hardcopy Member ID Card ? Calendars Return to Search Close to Main Menu

Choose the different activities from the dropdown and determine if they are mistaken scans. If they are mistaken scans, then remove them by clicking on the x and push Delete on your keyboard.

If they are not mistaken scans and the member should have been enrolled, then click back on the Members tab. Click the View/Update Enrollment History button near the bottom right and add a new enrollment record to the member. In our example, this membership expired on 12/31/2019 and the member attended through 2020, so they need an enrollment period for 2020.

Enrollment History

Enrollment History for: **Nellie Grey 26 Unit: 01**

**HOW TO RE-ENROLL A MEMBER:**

1. Add a **NEW Entry Date, Expiration Date and Member Type** on the **NEXT AVAILABLE LINE**
2. The system will default the member to a renewal if they have been enrolled previously
3. The system will fill in the Unit Code accordingly

**NOTE: The Expiration Dates and Entry Dates must not overlap each other.**  
**NOTE: All members should have an Entry and Expiration date.**

Entry Date	Expiration	Type	New/Renewal	Unit Code
09/06/2016	06/09/2017	School Only	New	01
06/19/2017	09/01/2017	Summer Only	Renewing	01
09/11/2017	06/01/2018	School Only	Renewing	01
06/11/2018	08/10/2018	Summer Only	Renewing	01
09/02/2018	12/31/2018	Regular	Renewing	01
01/01/2019	12/31/2019	Regular	Renewing	01
*				

Back on the Members screen, Use the arrows at the top right to scroll to the next member and repeat the process for each member who did not have enrollment since 12/31/2019 but has had attendance in 2020.

To pull list of the same members from above, follow these steps.

Click Reports, click the Members tab and choose the Custom Member List.

You can use the same criteria on the Universal Selection Engine (Page 1 and 2) to pull a list of the same members.

Create a report named “Data Review“. This report will be available in the Find Report Name dropdown once you have created it.

Click Preview.

You will see the following screens to choose dates, units and activities for the ‘Last Date Attended in Range’ and ‘Number of Days in Attendance’. You were being asked for this because these two fields are calculated fields and could be for any date range.

On the First/Last Date Attended in Range - fill in the date range of 1/1/2020 to 12/31/2020, choose all Units, choose all activities and click Continue.

NOTE that these dates will change based on the time frame you are asking for on Page 1 and 2.

On the Number of Days in Attendance screen - fill in the date range of 1/1/2020 to 12/31/2020, choose all Units, choose all activities and click Continue.

NOTE that these dates will change based on the time frame you are asking for on Page 1 and 2.

**Number of Days in Attendance**

You have included the "Number of Days in Attendance" object and/or the Attendance Matrix in this layout.

- Select the date range for the attendance
- Select Attendance Codes
- Select Unit(s) where attendance occurred
- Select the Activities
- If Matrix, Select Type and Count
- Click Continue

From: 01/01/2020 (Wed) To: 12/31/2020 (Thu)

Code	Unit Name	Select
01	Downtown Unit	<input checked="" type="checkbox"/>
02	Southside	<input checked="" type="checkbox"/>
OYS	Other Youth Served	<input type="checkbox"/>

Select All  
Clear All

Attendance Code	Description	Counts as Attendance for #Days Column
X	Regular Attendance Full Day	<input checked="" type="checkbox"/>
x	Regular Attendance Half Day	<input checked="" type="checkbox"/>
H	Holiday Full Day	<input type="checkbox"/>
h	Holiday Half Day	<input type="checkbox"/>
E	Excused Absence Full Day	<input type="checkbox"/>
e	Excused Absence Half Day	<input type="checkbox"/>
N	Non-Excused Absence Full Day	<input type="checkbox"/>
n	Non-Excused Absence Half Day	<input type="checkbox"/>

Activity	Sel
Arts & Crafts	<input checked="" type="checkbox"/>
Breakfast	<input checked="" type="checkbox"/>
Computer Lab	<input checked="" type="checkbox"/>
Dinner	<input checked="" type="checkbox"/>
Free Play	<input checked="" type="checkbox"/>
General Attendance	<input checked="" type="checkbox"/>
Halloween Party	<input checked="" type="checkbox"/>
Lunch	<input checked="" type="checkbox"/>
MOSI Field Trip	<input checked="" type="checkbox"/>
Passport to Manhood	<input checked="" type="checkbox"/>
Power Hour	<input checked="" type="checkbox"/>
Project Learn	<input checked="" type="checkbox"/>

General Attendance Only  
Select All  
Clear All

Continue Cancel

**Vision Computer Programming Services**  
**Data Review**

Name	Final Entry Dt.	Final Exp. Dt.	Last Dt Attended	# Days Attended
Grey, Kevin	1/1/2019	12/31/2019	12/30/2020	245
Grey, Nellie	1/1/2019	12/31/2019	9/30/2020	185
Harris, Jean	1/1/2019	12/31/2019	12/30/2020	247
Harris, Will	1/1/2019	12/31/2019	12/30/2020	248
Jacobs, Bob	1/1/2019	12/31/2019	12/30/2020	248
James, Brandon	1/1/2019	12/31/2019	12/30/2020	249
James, Ernest	1/1/2019	12/31/2019	12/30/2020	247
Jamison, Fred	1/1/2019	12/31/2019	12/30/2020	247
Jamison, Matt Spencer	1/1/2019	12/31/2019	12/30/2020	246
Johnson, Portia	6/8/2019	12/31/2019	12/30/2020	250
Johnson, Timothy	6/8/2019	12/31/2019	12/30/2020	251
Keller, Jason	6/8/2019	12/31/2019	12/30/2020	247
Rivers, Erma	8/16/2019	12/31/2019	12/30/2020	246
Smith, Bart	9/11/2018	6/7/2019	12/30/2020	140

Record Count: 14

This is the list of members that would need to be reviewed. The membership for these members have expired and they have recent attendance.