



## Vision Computer Programming Services, Inc.

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### Members – Required Fields for Adding New Members

Would you like to make additional fields required during the adding of members? If so, follow these steps to show and make additional fields required on the Add Member screens.

1. From the Main Menu click the Local/Station Settings button
2. Click the Local Settings 1 tab (NOTE: The defaults you set here are for all computers on a network)
3. Click the 'Customize Add New Member Form (Visible or Required) button on the bottom of the screen

4. On the Primary Member Information tab choose the fields that you would like to be Visible and/or Required. Note that some of the fields are required and cannot be turned off.

	Visible	Required
Ethnicity	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DOB	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SS#	<input type="checkbox"/>	<input type="checkbox"/>
Age Group	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Member ID Card Needed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
'Calculate' Member Number Button	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Gender	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Requires P/G Pickup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Entry Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Expiration Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Membership Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

	Visible	Required
Member Address	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
School	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
School Grade	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Member Primary Phone Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Member Primary Phone # Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Has Special Needs/Health Issues	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Health Issues	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Has Medications	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Medications	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Current Single Parent	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
County	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Lives with Mom	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Lives with Dad	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Lives with Grandparents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Lives with StepMother	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Lives with StepFather	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Lives With Foster	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Lives with Other	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Live with Other Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Annual Income Level	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

5. Click the Additional Member Information tab
6. Double click on any field to make it visible on the Add Member screen
7. Double click twice on any field to make it visible and required on the Add Member screen
8. Click the Group at Top button on the right so all of your visible fields are at the top of the list
9. Use the up/down arrows to move the fields into the order you would like to see them

10. Please note that there is a limit of 34 fields that can be shown on the Add Member screen and the system will give you a count at the bottom as you turn the visible option on fields

11. Click the Add a Contact tab
12. Check the box to Get Information for One Contact
13. Double click on any field to make it visible on the Add Member screen
14. Double click twice on any field to make it visible and required on the Add Member screen
15. In the bottom section double click on any field to make it visible

16. Click the Close button on the Customize Fields on Member Form
17. Click the Close button on the Local/Station Settings form
18. From the Main Menu, click the Members button
19. Click the New Member button
20. Fill in the members name
21. Choose the member's household information
22. Fill in the basic demographic and enrollment information and click Continue
23. Fill in the new fields that are visible and required. NOTE: you will not be able to continue adding a member if a required field is blank
24. If you have chosen to show and require Address, City, State and Zip you can choose the Zip from the dropdown that matches the members City, State, Zip combination and the City and State will fill in automatically
25. If you have chosen to show and require Member Primary Phone Number, you can type in the 7 digits of the phone and push tab or enter and the system will provide your Default Area Code and punctuation. If the Default Area Code comes up with 727, then you can fill in your Default Area Code in Local/Station Settings on the Station Settings tab in order to avoid having to type the area code for all your new members

26. Click Add Member And Continue to Contact button

27. Here you can add a Contact Already in Database or Add New Contact
28. Choose the household for the new Contact
29. Fill in any fields that have been setup to view or be required
30. Click Add Contact
31. You will then be on the main members screen and can continue adding additional information or you can add the next member