Preparation for the 2020 Boys & Girls Clubs of America Annual Report

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.

These cleanup routines should be completed before December 31, 2020

Duplicate Members Report

Reports, Members 3 tab, click on 'Duplicate Members Report'
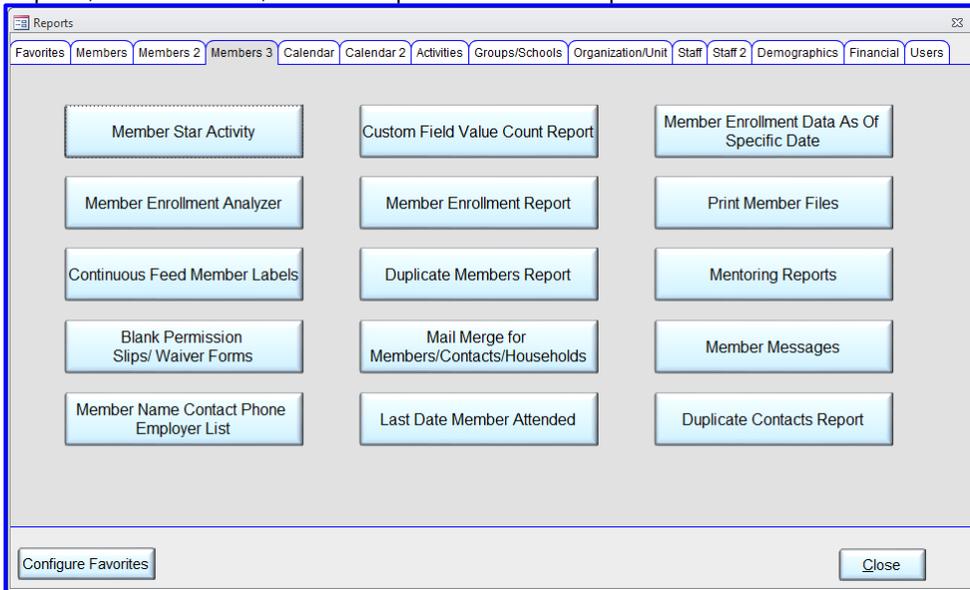
On the Universal Selection Engine, put in your Time Frame – 'Enrolled at least one day – 01/01/2020 thru 12/31/2020 then click 'Continue'
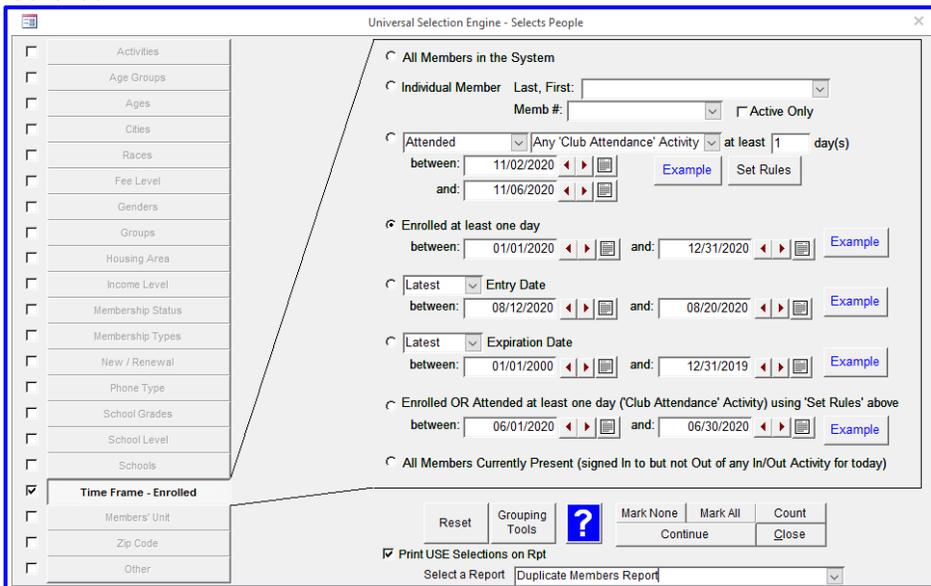
Choose Member Name, Unit, Date of Birth, Address, Primary Phone and Date/Time Added for 'Fields show on the report' on the left.
Choose Last Name, First Name and Date of Birth for 'Fields to check for duplicates' on the right, Preview and Print the list.
You can also use Last Name, First Initial, Date of Birth to catch names like John Smith and Johnny Smith.

If there are duplicates in the above report, 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. If you need further instructions here is a link to our website with the instructions to help with this.
https://www.visioncps.com/Resources/NewMTSQTs/Procedures%20-%20Consolidate%20Households%20and%20People.pdf

From Main Menu, click the Procedure button
Click the 'MTS Maintenance' tab
Choose the 'Member Tracking System Maintenance Activities' button

Once you open the Maintenance Activities it will look similar to the following screen.

Maintenance Activity	Frequency	Due	Last Performed	Last Reminder	User Who Last Snoozed	Last Snooze Duration (# of Days)	Next Reminder
Back-up Data -- OVERDUE!	weekly	10/1/20	9/24/20	11/18/20			10/1/20
Compact & Repair Data and Stds -- OVERDUE!	monthly	10/24/20	9/24/20	10/27/20			10/24/20
Compact & Repair Program File -- OVERDUE!	monthly	10/24/20	9/24/20	10/27/20			10/24/20
Update Age Groups -- OVERDUE!	annually	9/13/20	9/13/19	11/18/20			9/13/20
Find & Fix Missing Member Data -- OVERDUE!	monthly	10/24/20	9/24/20	10/27/20			10/24/20
Repair/Resolve Household Occupant Records	quarterly	12/24/20	9/24/20	9/3/20			12/24/20
Edit Data (fix data entry mistakes)	quarterly	12/24/20	9/24/20	9/24/20			12/24/20
Find & Fix Missing Staff Data	quarterly	12/24/20	9/24/20	9/24/20			12/24/20
Back-up Org Info and Stds -- OVERDUE!	weekly	10/1/20	9/24/20	11/18/20			10/1/20
Clean up Sessions and U.S.E. Temp tables -- OVERDUE!	biweekly	10/8/20	9/24/20	11/18/20			10/8/20
Reset Autonumber Seed Values -- OVERDUE!	monthly	10/24/20	9/24/20	10/27/20			10/24/20
Charge/Payment Imbalances -- OVERDUE!	monthly	10/24/20	9/24/20	10/27/20			10/24/20
Delete Unattended Activity Sessions	monthly	12/3/20	11/3/20	9/24/20			12/3/20
Update Holidays Table in Org Info	annually	8/21/21	8/21/20	1/9/12			8/21/21
Change Expired Membership Numbers	Never	1/1/2035	1/1/10	2/12/16			1/1/2035
Upload QE Mobile Data	Never	4/3/2037	4/3/12				
Download QE Mobile Data	Never	4/3/2037	4/3/12				

Click the 'Find & Fix Missing Member Data' line, click on the 'Open Procedure Form' at the bottom of the screen.

On the Universal Selection Engine - select 'Enrolled at least one day', fill in the dates between 01/01/2020 thru 12/31/2020 then click 'Continue' at the bottom:

You will see this screen, click the dropdown arrow and select the fields you need to fix:
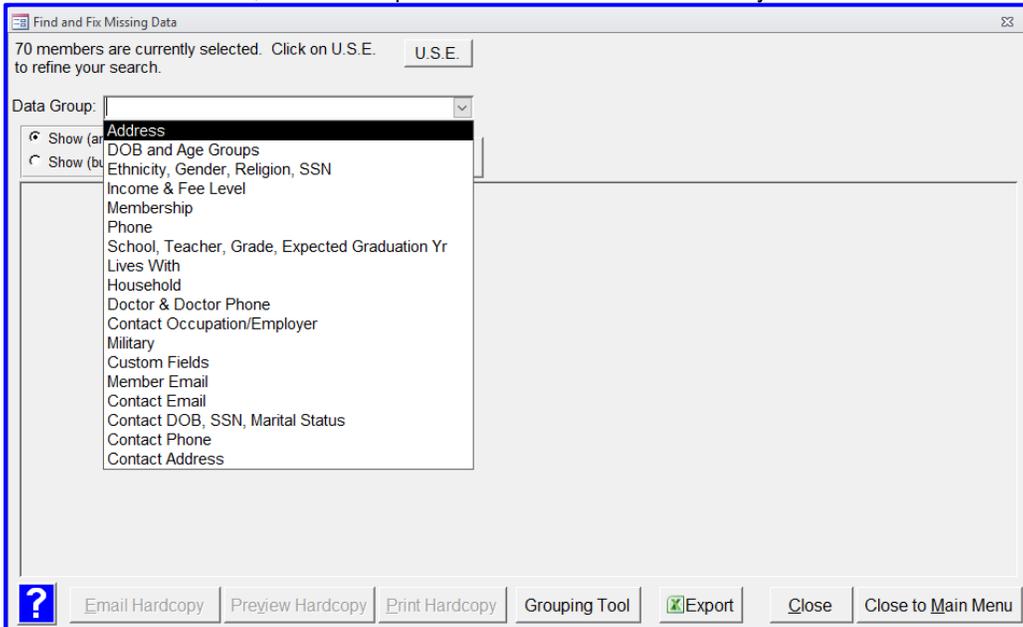
The most important Data Groups for the Annual Report are:
1. **DOB and Age Group (Only Date of Birth is needed for the Annual Report)**
2. **Ethnicity, Gender, Religion, SSN (Only Ethnicity and Gender are needed for the Annual Report)**
3. **Income & Fee Level (Fee Level = Free or Reduced Lunch eligibility and is the only one needed for the report)**
4. **Membership (this screen should always be empty)**
5. **Household (Only 1- Parent is needed for the Annual Report)**
6. **Military**

If a page comes up with members listed in it then the missing info needs to be filled out and it can be filled out on that page, which will populate to the members info in the database.

Choose DOB and Age Groups - only DOB is needed for the report:
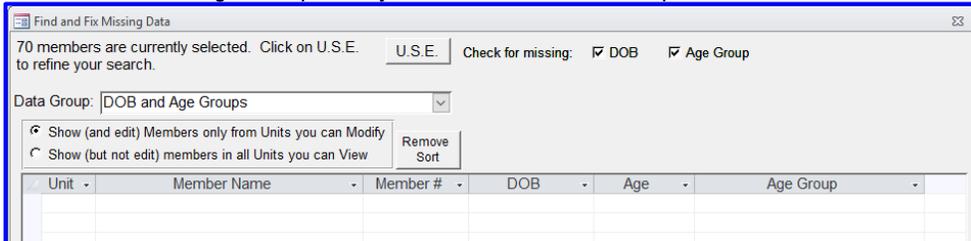
Choose 'Ethnicity, Gender, Religion, and SSN' – only Ethnicity and Gender are needed for the report, you can uncheck Religion & SSN as seen below. Fill in the missing information for each member here and it will be updated in their record.
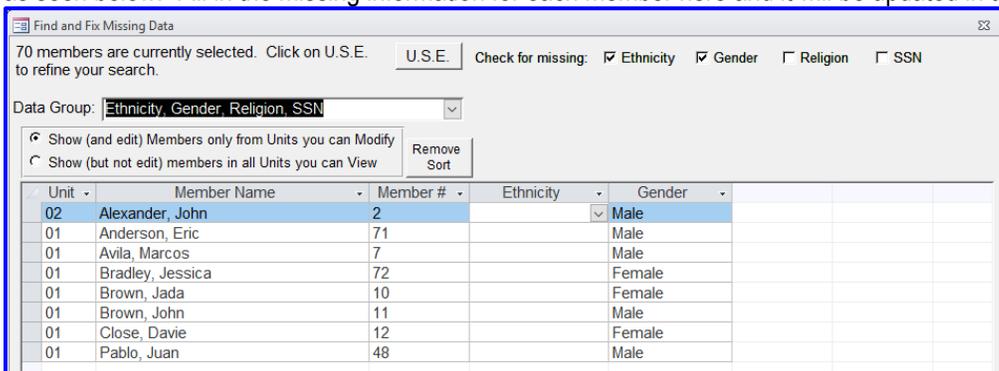
Choose 'Income & Fee Level' – Fee Level is eligibility for free or reduced lunch at school and is the only field needed here.

Find and Fix Missing Data

70 members are currently selected. Click on U.S.E. to refine your search.   [U.S.E.]   Check for missing: ☐ Income Level ☑ Fee Level

Data Group: Income & Fee Level

- ◉ 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 #	Fee Level
01	Dixon, Meryl	18	
01	Gregory, Freddy	24	
01	Harris, Tania	28	
01	Harris, Will	29	
01	James, Ernest	33	
01	McCarthy, Colin	42	
01	Pablo, Juan	48	
01	Pena, Alfredo	49	
01	Perez, Julia	51	
01	Reed, Erin	58	
01	Smith, Michelle	63	

Choose the 'Membership' group – this screen should never contain any members.

Find and Fix Missing Data

70 members are currently selected. Click on U.S.E. to refine your search.   [U.S.E.]   Check for missing: ☑ Status ☑ Type ☑ Exp. Date ☑ New/Renewal ☑ Enrollment Unit

Data Group: Membership

- ◉ Show (and edit) Members only from Units you can Modify
- ○ Show (but not edit) members in all Units you can View   [Remove Sort]

Cur. Unit	Member Name	Memb #	Status	Entry Date	Exp Date	Type	New/Renew	Enr. Unit

Choose the 'Household' option – 1-Parent is the only field needed here and all should be answered with a Y or N.

Find and Fix Missing Data

70 members are currently selected. Click on U.S.E. to refine your search.   [U.S.E.]   Check for missing: ☐ 65+ ☐ # in HH ☐ Handicapped ☐ # < 18 years old ☐ Head Of Household ☐ Community ☑ 1-Parent HH

Data Group: Household

- ◉ 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	1-Parent
02	Alexander, John	2	?
01	Anderson, Eric	71	?
01	Dixon, Daryl	17	?
01	Dixon, Meryl	18	?
01	Dorner, Eric	75	?
01	Gregory, Freddy	24	?
01	Jacobs, Bob	31	?
01	Johnson, Portia	35	?
01	Johnson, Timothy	36	?
01	Pablo, Juan	48	?
01	Perez, Julia	51	?

Choose Military and fill in None and N if you are not in an area where you serve military members.

Find and Fix Missing Data

70 members are currently selected. Click on U.S.E. to refine your search.   [U.S.E.]

Data Group: Military

- ◉ 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 #	Branch	Lives On Base
01	Aaron, Brandy	1		N
01	Aaron, Greg	2		N
01	Aaron, Theresa	3		N
02	Alexander, John	2		N
01	Anderson, Eric	71		?
01	Archer, Ernie	5		N
01	Archer, Stephen	6		N
01	Avila, Marcos	7		N
01	Bighorn, Jacob	8		N
01	Bradley, Jessica	72	None	?

When you are finished fixing the missing Members information click on the 'Close' Button at the bottom right

Then click 'Cancel' on the Universal Search Engine:

While in the Maintenance Activities you will click on 'Find and Fix Missing Staff Data', click the 'Open Procedures Form' button and follow the same steps you did from 'Find and Fix Missing Member Data'. The most important will be Age, Ethnicity and Gender.

Once you have fixed the Staff data go back to the 'Maintenance Activities' page, click the line for 'Delete Unattended Activity Sessions' then click on the 'Open Procedure Form' button.

MAKE SURE ALL ATTENDANCE HAS BEEN ENTERED BEFORE YOU RUN THIS PROCEDURE!!!

You will see this window. Fill it out with the dates ranging from 01/01/2018 to today's date – click on 'Specific Unit' unless you are in charge of all Units then select 'All Units' – choose your unit from the dropdown list – then select 'All Activities (except Staff Hours)' – then click 'Delete Unattended Sessions'. This removes any activities that were scheduled that do not have any attendance recorded and is important for the ADA numbers.

The system will ask if you are sure – click 'Yes'.
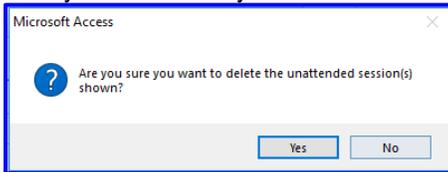
The system will tell you how many unattended sessions have been deleted – click OK then click the 'Close' button at the bottom of the page.
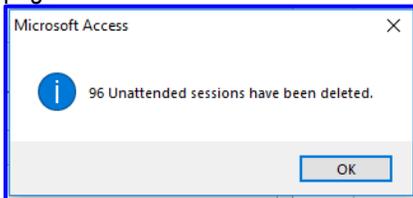
Back on the 'Maintenance Activities' page, click the line for 'Repair/Resolve Household Occupant Records' – The purpose of this procedure is to review and clean up any erroneous dates for Household Stat and Household Occupant records which include the following data fields: Address, City, State, Zip, 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. – Select 'Open Procedure Form'

Your screen will look like this:
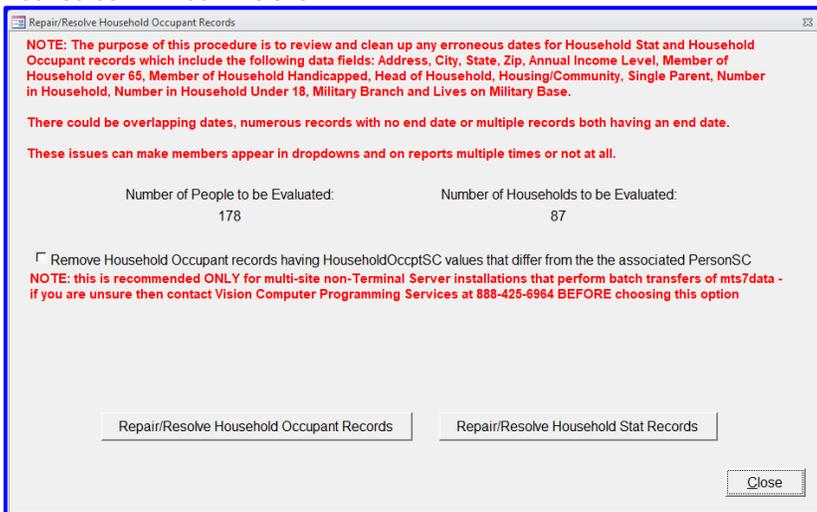
Click the 'Repair/Resolve Household Occupant Records' button on the left
On the bottom right of your screen you will see 'Repairing Records
Then the Complete message box will come up
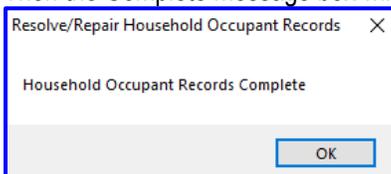
Repeat these same steps for Repair/Resolve Household Stat Records

Once you have completed all of the Maintenance items above and all information has been entered for your members, you can then work on the other items in the list from the dropdown. These items are for your benefit and information for the members, which in turn will provide better information in the reports that you pull throughout the year. The above Instructions and maintenance items is what are needed for the Annual Report for the BGCA.

If you have any questions please feel free to contact us at: 888-425-6964,   Thank you