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Custom Member List for Enrolled vs. Attended Members

The most common question about the Member Tracking System™ is ‘Why don’t my numbers match on my reports?’ The most common answer is data entry. Very often we find that members have been checked into activities/programs but they do not have a current enrollment. If a member is attending your facility there should be a current enrollment.

Use the Custom Member List to view members whose membership has expired and yet they have attendance recently.

1. Go to the main menu.
2. Click on Reports, Click Members tab.
3. Click on Custom Member List, located at the bottom-right corner of your screen.
4. On the Universal Selection Engine, select the following:
 - a. Time Frame = Latest Expiration Date – 01/01/2000 to 12/31/2017
 - b. Click the Activities checkbox on the top left.
 - c. Choose the Unit.
 - d. Choose who Attended At least one time.
 - e. Choose between 1/1/2018 and today.
 - f. Click the Mark All button at the bottom to select all Activities.
 - g. If you have multiple Units and can view them all then click the Page Break by Unit at the bottom so your report will separate each unit.
 - h. NOTE: If you want to pull this report each month then move your Latest Expiration Date in step a above to the end of the previous month.
5. Click on Continue.
6. In the Custom Member List screen, click on Add New Report in the lower left corner.
7. Choose to create the report from scratch, or to copy an existing report select if from the Find dropdown first then select copy this report.
8. Type the name of your new custom report in the Report Name text box.
9. Steps 6 to 8 are only necessary the first time you create this report. This report will be saved and can be found later in the Find Report Name dropdown at the top of the screen.
10. Enter in an optional Report Subtitle if desired, such as the date of the report.
11. Under Column Heading, select the following fields:
 - a. Column 1 = Unit Name and Sorting = Ascending
 - b. Column 2 = Member Full Name and Sorting = Ascending
 - c. Column 3 = Entry Date (Final)
 - d. Column 4 = Expiration Date (Final)
 - e. Column 5 = Last Date Attended in Range
 - f. Column 6 = Number of Days in Attendance
12. Click preview to review your report.
13. You will be asked about the First/Last Date Attended in Range

- a. Fill in the current month or period of time you are reviewing. In this example from 01/01/2018 to today
 - b. Choose Unit(s)
 - c. Choose Attendance Codes X and x
 - d. To the right of the Activities box, click Selection All
14. Click Continue
15. You will be asked about the Number of Days in Attendance
- a. Fill in the current month or period of time you are reviewing. In this example from 01/01/2018 to today
 - b. Choose Unit(s)
 - c. Choose Attendance Codes X and x
 - d. To the right of the Activities box, click Selection All
16. Click Continue

You will see a list of members where their Expiration Date is old and yet they have had recent attendance.

You can use this list to either:

Update the members Enrollment information so they have a current membership

Or;

Remove the attendance if it is a mistaken check in

Open the Members screen and review each of these members.

If you have any questions about this process please feel free to contact our office.