



SENIOR AFFAIRS POINT OF SALE SYSTEM MEMBERSHIPS TRAINING COURSE

Self-Paced Course

Course Introduction, Overview and Definitions

Revised December 6, 2016

DSA Memberships Course

Introduction Overview and Definitions

- **After completing this course, you shall be able to:**
 - Issue and renew memberships and process payment transactions in the point of sales system for the Department of Senior Affairs in accordance with policies, rules, regulations and legislation.



DSA Memberships Course

Introduction Overview and Definitions

Course Goals/Objectives:

- Understand the City's Policies, Rules and Regulations for Department of Senior Affairs (DSA) Memberships
- Understand the role of the Area Agency on Aging (AAA)
- Understand Membership Cards vs. Membership Passes
- Understand Membership Card Eligibility and Benefits
- Understand Aggregate Cards and Aggregate Card Use
- Understand Siriusware and SAMS applications systems and their purposes

DSA Memberships Course

Introduction Overview and Definitions



Once you have completed this full course you shall know how to:

- Issue a new membership pass and process a payment transaction
- Renew a membership pass and process a payment transaction
- Process a membership card, reprint and process a payment transaction
- Identify AAA eligibility exceptions
- Create a membership based on AAA eligibility exceptions
- Track and process AAA meal transactions in Siriusware through the Special Codes

DSA Memberships Course

Introduction Overview and Definitions

- **Overview of full Course Content:**
 - **Section 1-** Siriusware & SAMS systems
 - **Section 2** – Memberships Overview/Memberships & Passes
 - **Section 3** – Issuing a New Membership Card
 - **Section 4** – Renewing a DSA Membership
 - **Section 5** – Print/Reprint-Lost/Stolen/Request for New Card/Forgotten Card
 - **Section 6** – Alternate DSA Membership Eligibility/Linking in Point of Sale System-Special Codes
 - **Section 7** – Alternate Meal and Membership Eligibility/Special Codes **(For meal sites only)**
 - **Section 8** – Aggregate Cards and Special Reporting Codes in DSA Point of Sale System **(For meal sites only)**

DSA Memberships Course

Introduction Overview and Definitions

Overview of this course section:

- **Please review the following content, terms and definitions prior to beginning the topics. This section of the course will help you get familiar with common terms and their meanings as they are used within processes throughout this course.**
- The Department of Senior Affairs staff is responsible for issuing memberships at DSA locations for the citizens of the City of Albuquerque. It is imperative for DSA staff to understand the City of Albuquerque and AAA Rules, Policies and procedures and legislation that govern this process.
- Upon completion of this course you shall have the tools and information to successfully complete your duties as a Department of Senior Affairs employee to issue new and renewal membership cards/passes in the Siriusware system.

DSA Memberships Course

Introduction Overview and Definitions

- **Department of Senior Affairs (DSA):** Department of Senior Affairs is a community leader, who, in partnership with others, involves seniors and people of all ages in creating a community that enhances everyone's quality of life by providing opportunities to achieve their potential, share their wisdom, maintain their independence, and live in dignity.

DSA Memberships Course

Introduction Overview and Definitions

- **Area Agency on Aging (AAA):**
 - The City of Albuquerque and Bernalillo County Area Agency on Aging (AAA) is a state-sanctioned and federally mandated entity tasked with developing a comprehensive needs assessment, program planning and implementation and monitoring of all services to people over the age of 60, in Albuquerque and Bernalillo County. Lunches at meal sites and other activities are reimbursable and tracked by DSA for qualified 60 + seniors.

DSA Memberships Course

Introduction Overview and Definitions

- **What is the Social Assistance Management System (SAMS)?**
 - SAMS is the Reporting System for Qualifying Services for the Area Agency on Aging Activities. Member information, meals, activities and other items are tracked in SAMS for federal reporting and funding requirements for 60+ members who have filled out a SAMS form and have been entered into the SAMS system.
- **What is an Area Agency on Aging (AAA) Qualifying Service?:**
 - Qualifying services are determined by the case review of each 60+ member and their qualifying circumstances through the DSA member case management review process. Certain services are funded by AAA.
- **What is Siriusware?**
 - Point of Sales System of record. (DSA and the Parks and Recreation Department use this system.)
- **What is a Point of Sale system?**
 - A point of sale (POS) is the place where sales are made. A point of sale system is a combination of software and hardware that allows us to make financial transactions and simplify key day-to-day business operations.

DSA Memberships Course-Introduction Overview and Definitions

DSA Meal Site: Every lunch meal at a meal site must be accounted for in the Siriusware and SAMS systems. DSA Meal Sites are listed below:



Senior Centers:

- Barelitas Senior Center
- North Valley Senior Center
- Los Volcanes Senior Center



Multigenerational Centers:

- Manzano Mesa Multigenerational Center
- North Domingo Baca Multigenerational Center



DSA Memberships Course-Introduction Overview and Definitions

- **Congregate Meals:** Lunch meals for qualified seniors reimbursable by AAA to the Department of Senior Affairs.



DSA Memberships Course-Introduction Overview and Definitions

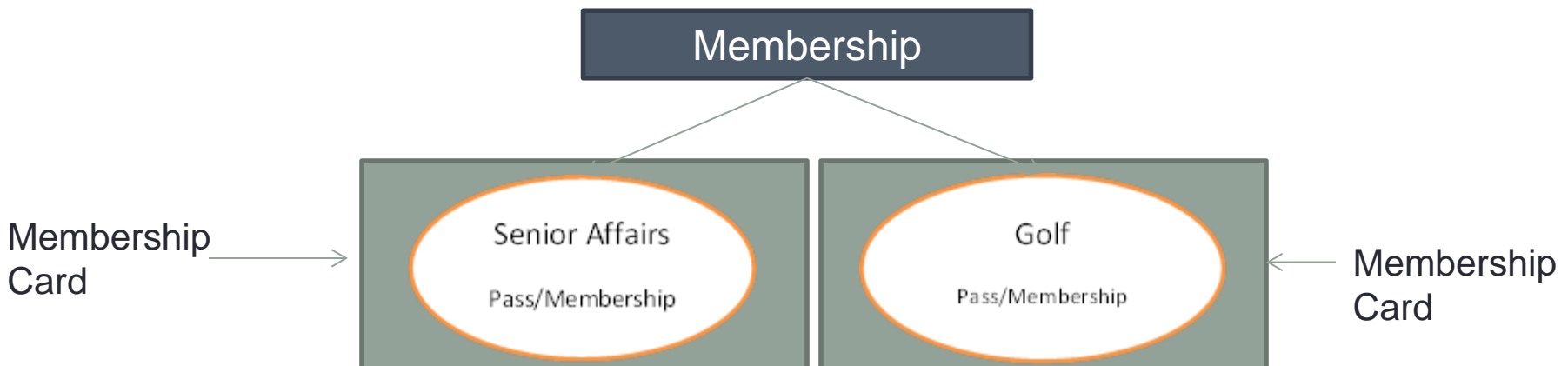
- **Special Codes-for AAA Eligibility Exceptions:** Codes in Siriusware under the “Special” button on the Point of Sale screen to track AAA eligibility exceptions for meal reimbursement reports to the Area Agency on Aging (AAA). (See Section 7 – Alternate Meal and membership Eligibility/Special Codes)

Scenario	Alternate Membership Eligibility/System Meal Special Code	Membership Card Color/Benefits
Spouse under 60 years of age	Eligible for lunch on a donation basis-needs to fill out a SAMS form and be entered into the SAMS system. (32AGSpouse)	Same card banner age eligibility color as qualified senior. Eligible for Title III congregate meal. A spouse under 60 is also eligible to participate in Activities/Trips, etc. with qualified senior present.
Disabled child living with qualified senior 60+	Eligible for lunch on a donation basis - needs to fill out SAMS form and enter into the SAMS system. (32AGDISWE)	Same card banner age eligibility color as qualified senior. Eligible for Title III congregate meal. A disabled child under 60 living with a qualified senior is also eligible to participate in Activities/Trips, etc. with qualified senior present.

DSA Memberships Course

Introduction Overview and Definitions

- **City of Albuquerque Membership Account:** Each person should only have one City of Albuquerque Member Account with their contact information and picture in the point of sales system.
 - This membership account can be started at any of the participating department locations if they are obtaining a membership card for that department. A person may have several different Membership Cards/Passes if they are members of Senior Affairs, Aquatics or Golf.
 - DSA Membership cards can be purchased at any of the six senior centers or two multigenerational centers.
- **Department Membership Card:** Senior Affairs/Golf Membership Card
 - Each Dept./Division (Senior Affairs and Golf) have their own:
 - Membership Cards/Passes



DSA Memberships Course

Introduction Overview and Definitions

- **Pass#**
- A pass number is created when a pass is sold for use or access by the holder of the Membership. Each pass has a unique number and the number never changes.
- Since both Parks and Senior Affairs utilize the point of sales system there are different passes.
 - Member New = Senior Affairs
 - Annual PM Pass = Parks & Recreation Department (Not used by Senior Affairs)

Pass Inquiry

for Guest#65362000001, THOMAS MORGAN

255080001 | 12486 | 03/04/2016 00:00 | 03/03/2017 23:59 | Active | Annual PM Pass | 12486 | FALSE | 0.00

Pass No.	Additional ...	Start	Expires /	Status	Item	Card#	DW	Balance
255080001	12486	03/04/201...	03/03/201...	Active	Annual PM Pass	12486	FALSE	0.00
6235000001	10318464...	01/01/2011...	11/12/2011...	Expir...	Member New		FALSE	0.00

UP

Member New = Senior Affairs

Annual PM Pass = Parks and Recreation Pass (Not used by Senior Affairs)

OK Cancel DOWN

DSA Memberships Course

Introduction Overview and Definitions

Membership/Pass Categories:

Department	Category	Item
32SENIOR	MEMBERSHIP	18-49 NEW
32SENIOR	MEMBERSHIP	18-49 REN
32SENIOR	MEMBERSHIP	50-59 NEW
32SENIOR	MEMBERSHIP	50-59 REN
32SENIOR	MEMBERSHIP	60PLUS REN
32SENIOR	MEMBERSHIP	60 PLUSNEW
32SENIOR	MEMBERSHIP	BOOMER NEW
32SENIOR	MEMBERSHIP	BOOMER REN
32SENIOR	MEMBERSHIP	MEMBER 18+
32SENIOR	MEMBERSHIP	MEMBER -18
32SENIOR	MEMBERSHIP	MEMBER NEW
32SENIOR	MEMBERSHIP	MEMBER REN
32SENIOR	MEMBERSHIP	ONLINEPASS
32SENIOR	MEMBERSHIP	REVONLINE
32SENIOR	MEMBERSHIP	SPRAYPARK

DSA Memberships Course

Introduction Overview and Definitions



**18-49
AGGREGATE**

GUEST # 2993065001



**50-59
AGGREGATE**

GUEST # 2992065001



**60 AND OVER
AGGREGATE**

GUEST # 2991065001



- **DSA Memberships:** DSA memberships are \$13.00 annually
- DSA membership card issuance and benefits are regulated by the Department of Senior Affairs by age class:
 - **18-49:** White Membership Card
 - **50-59:** Yellow Membership Card
 - **60 +:** Blue Membership Card
- There are special exceptions when a citizen qualifies for a DSA membership

***(See Section 7 of this course to learn more about Alternate Meal and Membership Eligibility/Special Codes)**

DSA Memberships Course

Introduction Overview and Definitions

- **Membership Policies & Procedures-DSA Employee Role:** The Department of Senior Affairs staff is responsible for issuing memberships at DSA locations for the citizens of the City of Albuquerque. It is necessary for DSA staff to understand the City of Albuquerque and AAA rules, policies, procedures and legislation that govern this process.



DSA Memberships Course

Introduction Overview and Definitions

- **Membership Card Benefits:** Citizens in Albuquerque can obtain a membership with the Department of Senior Affairs affording them certain benefits such as the ability to participate in trips, activities, dances, meals, exercise and space based on their age group and eligibility.
- **Membership Expiration:** DSA membership Cards expire one year from the date of issuance.

DSA Memberships Course

Introduction Overview and Definitions

- **DSA Membership Card:**
 - **Issuance:** A membership card is issued through the Siriusware system by DSA staff.
 - **Member Picture:** DSA Members are required to have their picture on their membership card.
 - **Membership Card Information:** The DSA membership card has the member's first and last name, guest number, age eligibility color class (White 18-49, Yellow 50-59, Blue 60+), member picture, a bar code on the front (for the SAMS system) and a magnetic stripe on the back for Siriusware transactions.
 - **Expiration Date/Label:** Each membership card also has an expiration label on the back that is applied by DSA staff when they are issuing or renewing a membership card.
 - **Membership Card Requirements:** Members are required to present their membership card for transactions when participating in any activities or eating at any DSA site.

DSA Memberships Course

Introduction Overview and Definitions

- **Aggregate Cards:** Aggregate Cards are to only be used to process a congregate meal lunch for a guest or a person who's SAMs application has not yet been entered into the SAMs database.
- Specific age eligibility (White 18-49, Yellow 50-59, Blue 60+) aggregate cards will be kept at the front desk of each Senior Center. DSA staff are the holders of these cards.

DSA Memberships Course

Introduction Overview and Definitions

The image displays three membership cards from the Department of Senior Affairs, each with a callout box explaining the Guest # and Addit No. fields.

18-49 AGGREGATE
 GUEST # 2993065001
 The **Guest #** is a number that is auto-generated and assigned by the Siriusware system when a Membership is created.

50-59 AGGREGATE
 GUEST # 2992065001
 The **Addit No.** is entered into Siriusware by DSA staff for use in the SAMS tracking system and becomes the bar code on the membership card.

60 AND OVER AGGREGATE
 GUEST # 2991065001

- **Guest #:**
- The guest number is assigned when a City of Albuquerque Membership is created for a person in the Siriusware system.
- **Addit No.:** The Addit No. is the reference number that the SAMS system uses from the Senior Affairs membership setup.
 - The Addit No. allows for the card to be used on both the Siriusware point of sales system and the SAMS system for tracking meals and reimbursements.
 - The Addit No. is entered into the Siriusware system by DSA staff when a new membership card is issued.
 - An Addit No. can be added, modified or deleted by anyone with the corresponding security
 - The Addit No. is represented on the front of the membership card as a bar code.

Quick Reference Guide to Course Content

- **Department of Senior Affairs (DSA)**
- **Social Assistance Management System (SAMS)**
- **Area Agency on Aging (AAA)**
- **Siriusware**
- **City of Albuquerque Membership Account**
- **Membership Card**
- **Pass Number (Pass No.)**
- **Membership Policies & Procedures-DSA Employee Role**
- **Membership Card Benefits**
- **Membership Expiration**
- **DSA Memberships**
- **Membership/Pass Categories**
- **Membership Card Benefits**
- **Membership Expiration**
- **Membership Card Issuance**
- **Membership Card Picture**
- **Membership Card Information**
- **Membership Card Expiration Date/Label**
- **Membership Card Requirements**
- **Aggregate Card**
- **Guest #**
- **Addit No.**

DSA Memberships Course

Introduction Overview and Definitions

- Congratulations! You have completed the **Introduction Overview and Definitions** section for the DSA Memberships Course

