



SENIOR AFFAIRS POINT OF SALE SYSTEM MEMBERSHIPS TRAINING COURSE

Section 3

Issuing a New Membership Card

Revised December 13, 2016

DSA Memberships Course

Section 3- Issuing a New DSA Membership Card

- **Overview:**

- A DSA Annual Membership is **\$13.00**
- A SAMS Registration application must be completed for every New and Renewal membership (Annually)
- The SAMS System tracks transactions for Seniors 60+ for AAA Reporting Requirements
- Memberships and benefits are issued based on age eligibility



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- **There are Three Scenarios where you will issue a NEW DSA Membership Card:**
 - **New COA Member & New DSA Member:**
 - Has never created a membership at Parks and Recreation or Department of Senior Affairs before.
 - Citizen does not have a City of Albuquerque Membership Account
 - Citizen is not in the Siriusware system. (Use Guest Lookup to Verify)
 - **Has a COA Point of Sales system Membership Account that they started with Parks and Recreation, but is not a DSA member:**
 - The member has a City of Albuquerque Membership Account
 - The member has or has had in the past, a Membership CARD/PASS from another department.
 - **Member has a COA Membership Account in the Point of Sales system & has a DSA Membership that they want to renew, but have changed into a new age eligibility Class.**
 - If a person has moved into a different eligible age class (e.g. turned 60), you will NOT process this as a renewal.
 - You will create a NEW membership pass with the member's COA Membership Account information and print a new membership card in the appropriate eligibility class (Blue or Yellow Card). This ensures the correct membership card is printed and the appropriate benefits are provided to that specific member. (Note: A manager will need to merge the information. This is covered in a separate job aid).

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Issuing a New DSA Membership Card

- **Scenario Overview:** In this scenario, a citizen named Amy has come to your DSA Center and wants a DSA Membership.

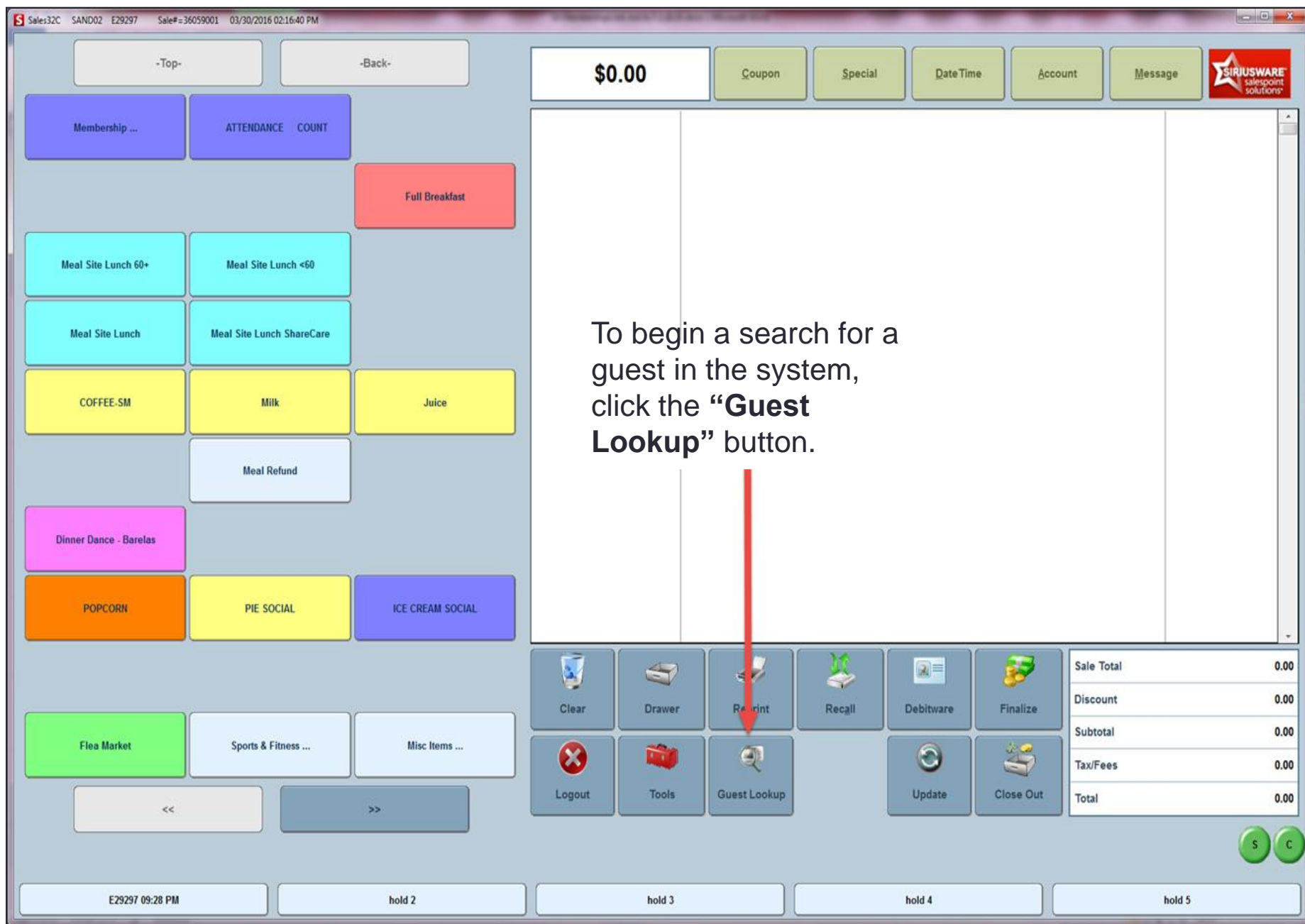
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Step 1

- **STEP ONE – Guest Lookup**

- First, **ALWAYS** check if the person is in the Siriusware system by clicking the Guest Lookup button and using the information from their SAMS registration form.
- If they are NOT in the system, you will create a new membership.
- If they ARE in the system you will need to see what membership **CARDS/PASSES** they have and determine if the transaction will be a renewal or a new membership.



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- If, after looking in the guest lookup, you find that Amy is NOT in the System, you will create a membership account and issue a Senior Affairs Membership Card.
- Follow the next screens/steps to learn how to:
 - Create a new City of Albuquerque Member Account
 - Issue a DSA Membership Card

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Step 2

Sales32C SAND02 E29297 Sale#=36059001 03/30/2016 02:24:33 PM

-Top- -Back-

\$0.00

Coupon Special DateTime Ac

Membership ... ATTENDANCE COUNT

Full Breakfast

Meal Site Lunch 60+ Meal Site Lunch <60

Meal Site Lunch Meal Site Lunch ShareCare

COFFEE-SM Milk Juice

Meal Refund

To begin a new Membership, click the **“Membership”** button.

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Step 3

Sales32C DRELO1 E24295 Sale#=68044001 04/15/2016 01:41:57 PM

-Top- Memberships

\$0.00

Coupon Special Date Time Account Message

60+ Member New 50-59 Member New 18-49 Member New

Member Child < 18

60 Plus Renewal 50-59 Renewal 18-49 Renewal

Click the appropriate age eligibility class based on the applicant's age and/or special qualifications

Clear Drawer Reprint Print CC Receipt Debitware Finalize

Logout Tools Guest Lookup Update Close Out

Sale Total	0.00
Discount	0.00
Subtotal	0.00
Tax/Fees	0.00
Total	0.00

hold 1 hold 2 hold 3 hold 4 hold 5

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Step 4

- Enter guest information into the appropriate fields and take the Member's Photo:
 - First and Last Name
 - Date of Birth
 - Address
 - Zip Code
 - Phone Number

ITEMS CREATED: 1 OF

Enter Required Member Information in the indicated fields:

First Name
Last Name
Date of Birth
Phone Number
Address

Step 4

Save

Guest Info Guest Info 2 Guest Info 3 Summary Pass Swipe Access Information

Parent:

*Name (FirstLast)

Second Guest

Salute

Salute

Mailing

Link

Link All

Type

Preferred

Clear Address

Unlink

Unlink All

Company

Address

City

Zip

Country

Phone

Ext.

Phone 2

Ext.

Fax

Ext.

() -

() -

() -

☐ No Mail☐ No Phone☐ No E-Mail

Search

Clear

Create New

Set Primary

Reset Web Password

Advanced Search

Card/Pass Search

Get from Self-Entry

Birth Date

Age

Height

ft / in

cm

Weight

pounds

kg

E-Mail

Account

Group

Gender

Male

Female

Enter CC-Swipe

New Photo

ID Card

Notes

Notify

History

Activity

Pass Inquiry

Quick Select Guest

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Step 5

Guest Info | Guest Info 2 | Guest Info 3 | Summary | Pass Swipe | Access Information

Parent: Click "Freeze" to take a new picture.

Mailing

Type: Preferred Clear Address

Company

Address

City

Zip

Phone Ext. Phone 2

☐ No Mail ☐ No Phone ☐ No E-Mail

Notify

Search Clear Create New Set Primary History Activity Pass Inquiry Quick Select Guest

Advanced Search Card/Pass Search Reset Web Password Get from Self-Entry

Age cm kg

Salute Salute

FREEZE

☒ Crop Fixed ☐ Crop Free

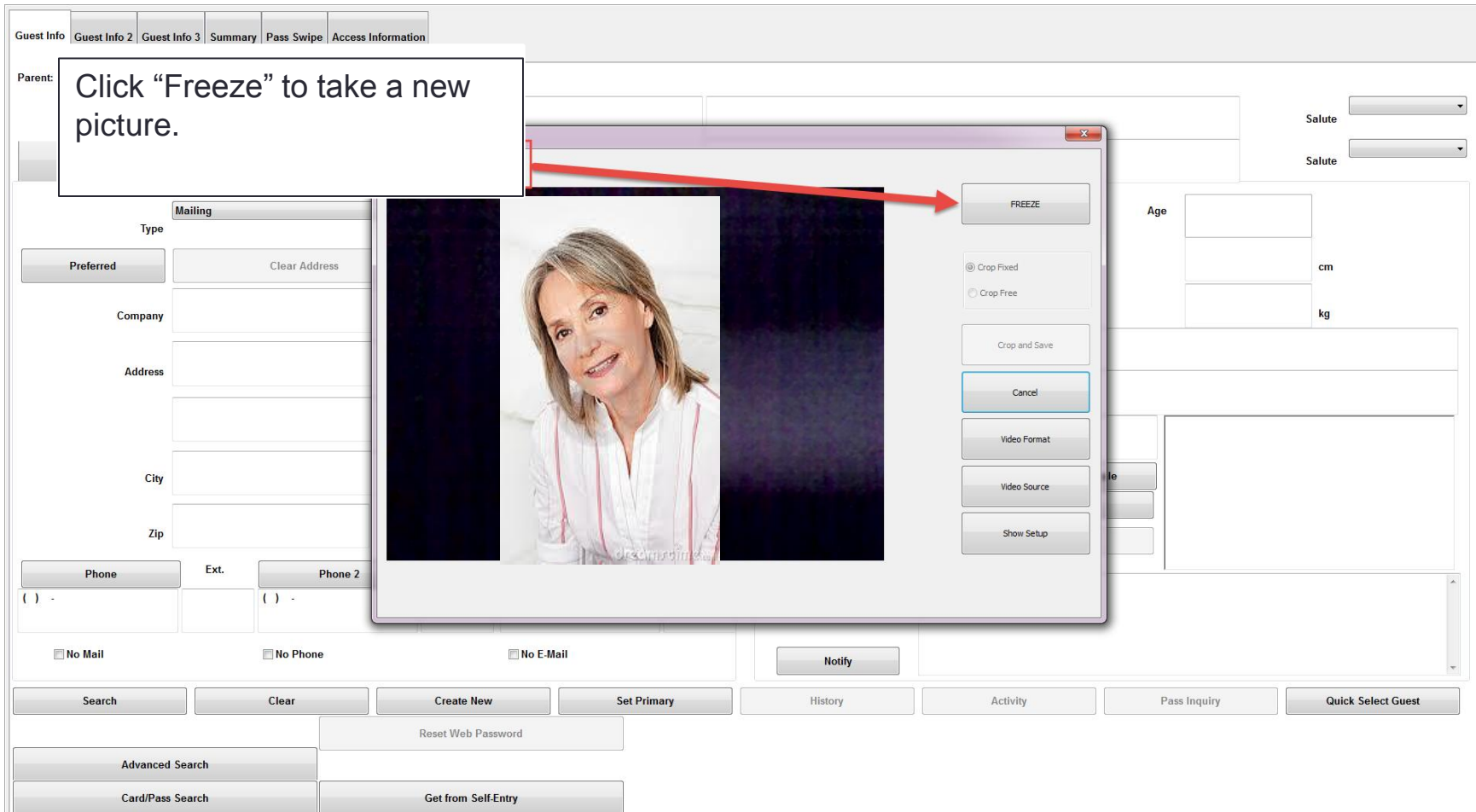
Crop and Save

Cancel

Video Format

Video Source

Show Setup

The screenshot shows a web application for issuing DSA membership cards. A modal window for photo cropping is open, displaying a photo of a woman. A red arrow points from a text box to the 'FREEZE' button in the modal. The background interface includes tabs for guest information, a form for mailing details, and various search and action buttons at the bottom.

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Step 6

Tip: Reposition/resize the crop if necessary and click save.

Click on the image area to reposition/resize the crop and then click the **“crop and Save”** button to save the member's picture

The screenshot displays a web interface for issuing a new DSA membership card. A central window shows a photo of a woman with blonde hair, wearing a white shirt, which is being cropped against a dark background. A red arrow points from the 'Crop and Save' button to the photo area. To the right of the photo, a control panel includes a 'UnFreeze' button, radio buttons for 'Crop Fixed' (selected) and 'Crop Free', and a 'Crop and Save' button highlighted with a red box. Below these are 'Cancel', 'Video Format', 'Video Source', and 'Show Setup' buttons. The background interface includes a 'Clear Address' button, a 'Phone 2' field, checkboxes for 'No Phone' and 'No E-Mail', a 'Notify' button, and a row of buttons: 'Clear', 'Create New', 'Set Primary', 'History', and 'Activity'. At the bottom, there are buttons for 'Reset Web Password' and 'Get from Self-Entry'.

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- To finish, click **Save>Finalize** (All information entered will be saved)
- Guest Number:** A guest number is automatically assigned by the Point of Sale System when you enter and save the information in the system.

Information Dialog: 60+ Member New

ITEMS CREATED: 1 OF 1

Previous Next Save

Guest Info Guest Info 2 Guest Info 3 Summary Pass Swipe Access Information

Access Information Tab

Addit-No

A

B

A Enter Access Information. This information is used to track meals through the SAMS federal reporting system for reporting requirements.

To enter the Addit-No, you will need the member's birth date and last four numbers of their social security number. (or the last four numbers of their telephone number if their social security number is not provided).

Format for Addit-No: 1+birthdate (dd/mm/yy) + last four digits of SSN # or the last four digits of the member's telephone number

Example: Birthday 01/07/1937- Last 4 SSN:1234

The Addit-No. for this member should be typed into they system as:

10107371234

B Click the **Save** button to Save the Member Information.

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Step 7

- **Process Payment & Print Membership Card**
 - If paying with a card, slide the card through the card reader on the Siriusware screen and once the payment is processed, the membership card will print.
 - If paying with cash click the “Finalize” Button. Once the payment is processed, the membership card will print

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- Congratulations! You have gone through the steps required to create a New City of Albuquerque Member Account *and* issue a Department of Senior Affairs Membership Card.



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- You will now learn how to issue a DSA membership card to a person who already has an account in the Point of Sales system.
- In this scenario, a citizen has already obtained a City of Albuquerque Member Account and Golf Membership at a Golf site and arrives at your Center to obtain a Senior Affairs Membership.

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Senior Center:

1. Look up the citizen by clicking on the **Guest lookup** button to see if they are already in the system.

Information Dialog: All Members Renewal 03/30/2016

ITEMS CREATED: 1 OF 1

Previous Next Save

Validation Guest Info Guest Info 2 Guest Info 3 Summary

Pass Number

Status Invalid

Message

Check Guest Lookup

Lookup Fingerprint

Run the guest's membership card through the Siriusware system to be pulled up under the "Guest Info" tab to pull up the member's information or click on the "Guest Lookup" button to find the member in the system.

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1. Check the passes that the citizen holds

Information Dialog: Guest Lookup

Cancel Save

Guest Info Guest Info 2 Guest Info 3 Summary

Parent Guest Primary Guest Second Linked Guests

*Name (First>Last) TEST FIRST NAME TEST LAST NAME

Second Guest

Type Mailing Link Link All

Preferred Clear Address Unlink Unlink All

Company NA

Address 12345 SUNNY DRIVE

City State Zip 87102 Country USA

Phone (505) 123-4567 Ext. () - Phone 2 Ext. () - Fax Ext. () -

☐ No Mail ☐ No Phone ☐ No E-Mail

Birth Date 03/15/1920 Age 96yrs

Height / ft / in cm

Weight pounds kg

E-Mail test@gmail.com

Account

Group

Gender Male Female

Enter CC-Swipe New Photo ID Card

Notify

Click the "Pass Inquiry" Button to review member information and verify

New Search Clear Create New Set Primary History Activity Pass Inquiry

Reset Web Password

Advanced Search Card/Pass Search Get from Self-Entry

This is a lookup of guest#45059001, TEST FIRST NAME TEST LAST NAME

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1. If the citizen does not have a membership issued through DSA, have them complete the Membership/SAMS form.
2. When they are done filling out the SAMS form, to begin their Membership, you will do a **guest lookup** search in the system to see if they are in the system.
3. Because the citizen opened a membership at a golf center, he **does** have an account and his basic information is in the Point of Sale System.
4. You still need to make sure that the citizen's information is correct by asking for his first and last name, his Date of Birth and his address or refer to the SAMS registration form provided.
5. Make sure that the citizen's picture is them.

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- Once the citizen fills out their form and pays the \$13.00 fee, you will issue a Membership Card to them.
- You will also need to enter the citizen's information into the SAMS system.

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- **Test Printed Card:** Test the Printed card in both the Siriusware and SAMS system card swipe readers to ensure the card works and pulls up the member's information.
- **Reprint Card:** If the card did not print correctly, do a reprint and test.
- **Expiration Date Label:** Adhere the new Expiration Date Label to the back of the member's card and write the new expiration date on the label.
 - Note: Ensure that the label does not cover or is not near the magnetic stripe as this could potentially cause issues with the scanner.

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- Citizen now has two Membership cards, one for Golf and one for Senior affairs, but only has one City of Albuquerque Member Account in the Point of Sales system.

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

UP

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

Member New = Senior Affairs

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

OK Cancel DOWN

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- Congratulations! You have completed Section 3- Issuing a New DSA Membership Card for the DSA Point of Sale Memberships Course

