SENIOR AFFAIRS POINT OF SALE SYSTEM MEMBERSHIPS TRAINING COURSE

Section 4

Renewing a DSA Membership

Revised December 28, 2016

DSA Memberships Course -Section 4
Renewing a DSA Membership

- **When does a member renew a membership?**
  - When a member's membership has expired
  - When a member's membership is about to expire

- **When is a membership NOT a renewal?**
  - **Age Eligibility Group Change:**
    - If a person has moved into a new eligible age class (White to Yellow, Yellow to Blue), you will **NOT** process this as a renewal. You will create a new membership and print a new membership card. This ensures the correct membership card is printed.
    - Once you have created a new membership and issued a new membership card for a person who has changed into a new age eligibility class, you will reprint a receipt and stamp it with the **Age Update** stamp.
    - Provide the stamped receipt to the manager so that the manager can merge the files and the citizen's membership expiration date remains the same.

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Steps 1 and 2

- **Overview:** When a member's membership is expired or about to expire and they:
  - Want to pay and renew and
  - They are NOT in a new eligibility age class, you will complete the following tasks/steps:

1. Have the member fill out a SAMS Registration form. (Membership forms must be completed annually.)

2. Swipe the member's card through the Point of Sales system to pull up the member's Information or click on guest lookup to find the member in the system to verify the member's information is correct.

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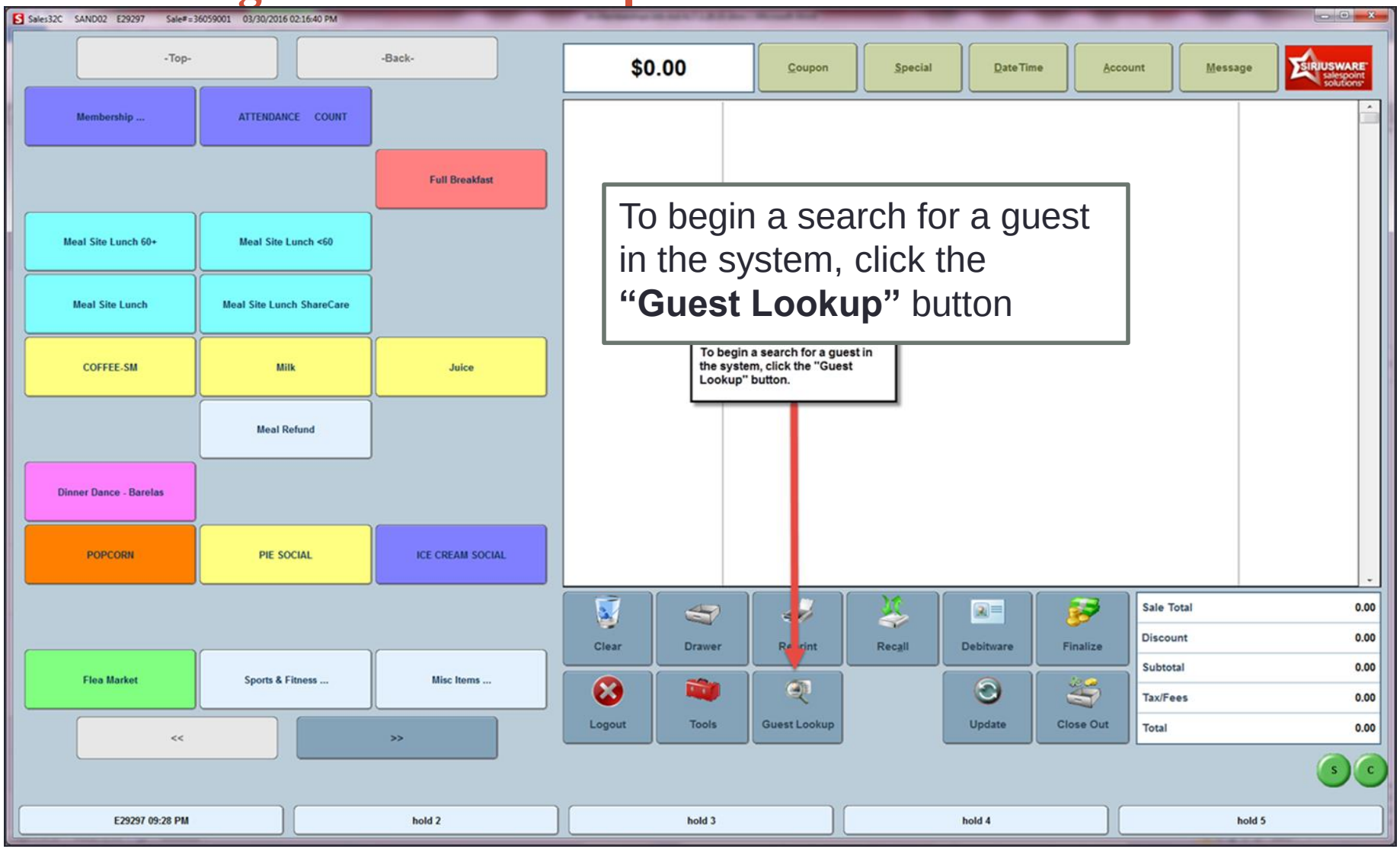

To begin a search for a guest in the system, click the **"Guest Lookup"** button

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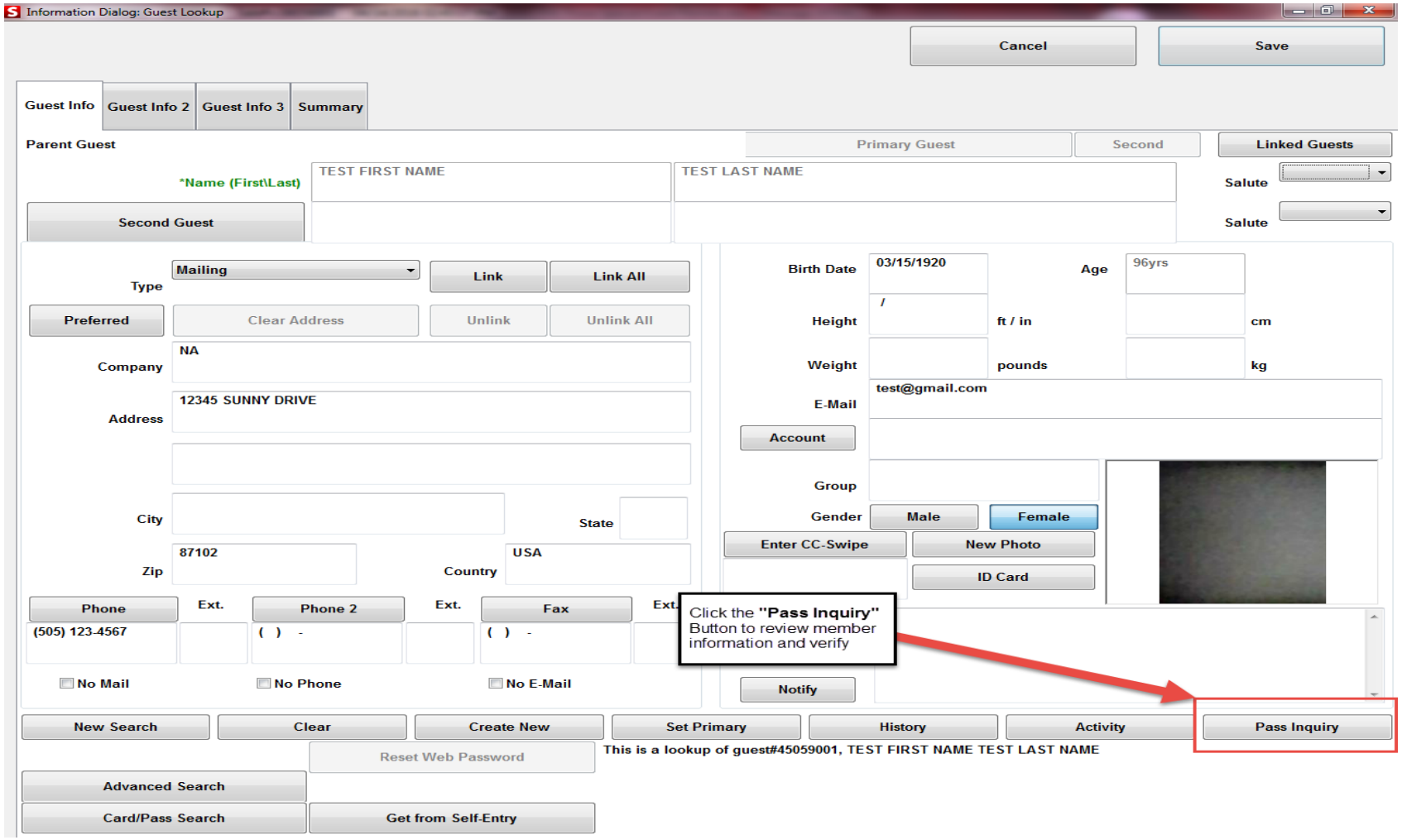
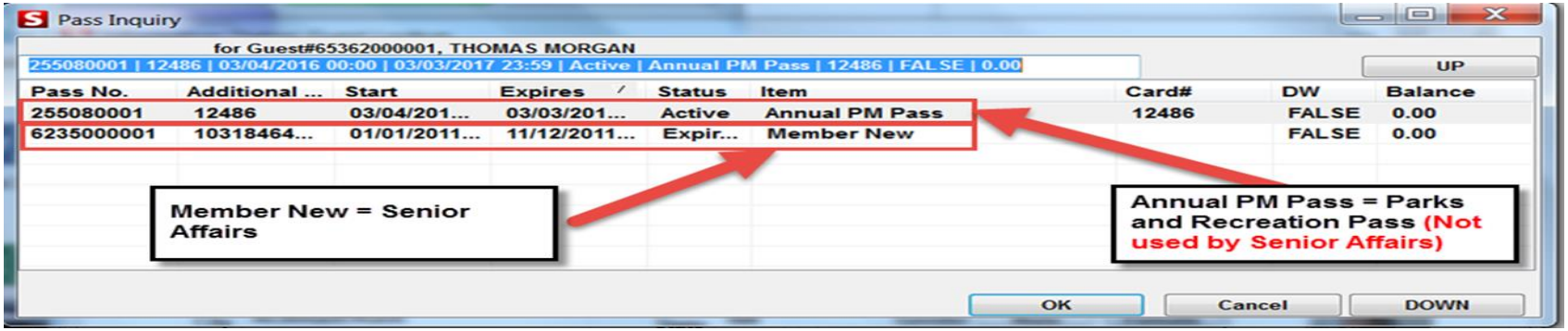


Look for Boomer Exception

- There are certain situations where a renewal will not print a card. **IF** you see the term **“Boomer”** in the **“Item”** column:



- **THEN, you will need to create an entirely new membership in the point of sale system for this member. Steps are on the next page. (you may also refer to section 3 of this course.)**

- Once you have done completed the transaction, you will add the member information to the log that is kept at the front desk of your DSA facility. Your manager will need to merge these accounts to avoid duplicates within the system.

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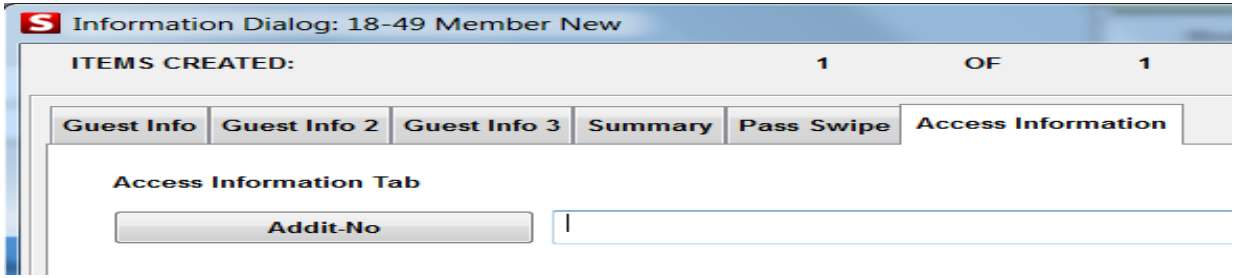
- Do a guest lookup on the point of sale system
- Record the member's addit_no and verify the number with the member if possible
- Exit guest lookup
- Sell a new membership/pass in the appropriate age group
- Enter the name of the member to pull up all data
- Verify or enter the addit_no in the validation tab



- When the sale is completed, the card will print automatically
- Test card and deliver card to member

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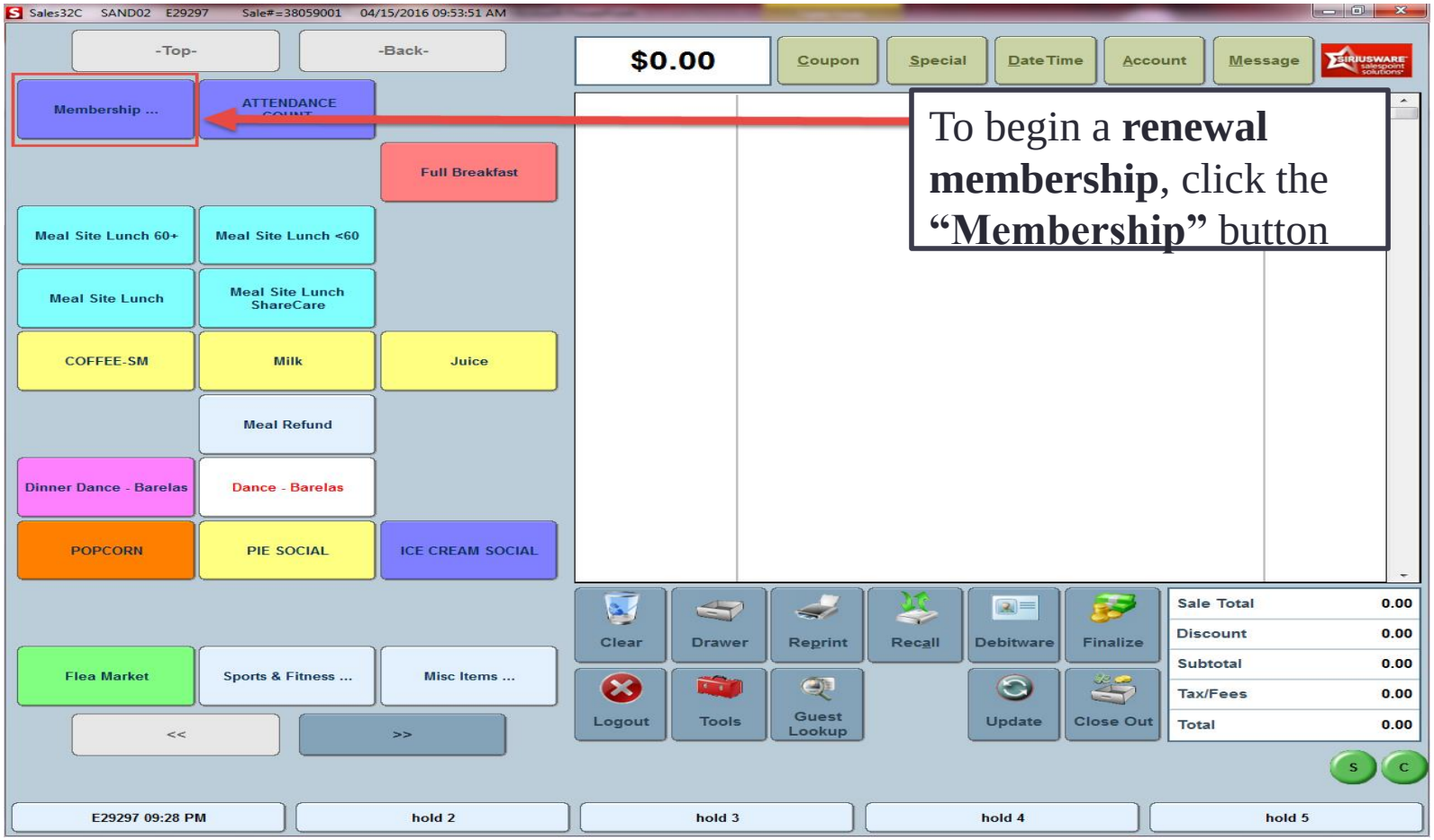
Step 3

From the Main page in the Point of Sales System, Click on the **"Membership"** button. This will take you to the Membership options page.



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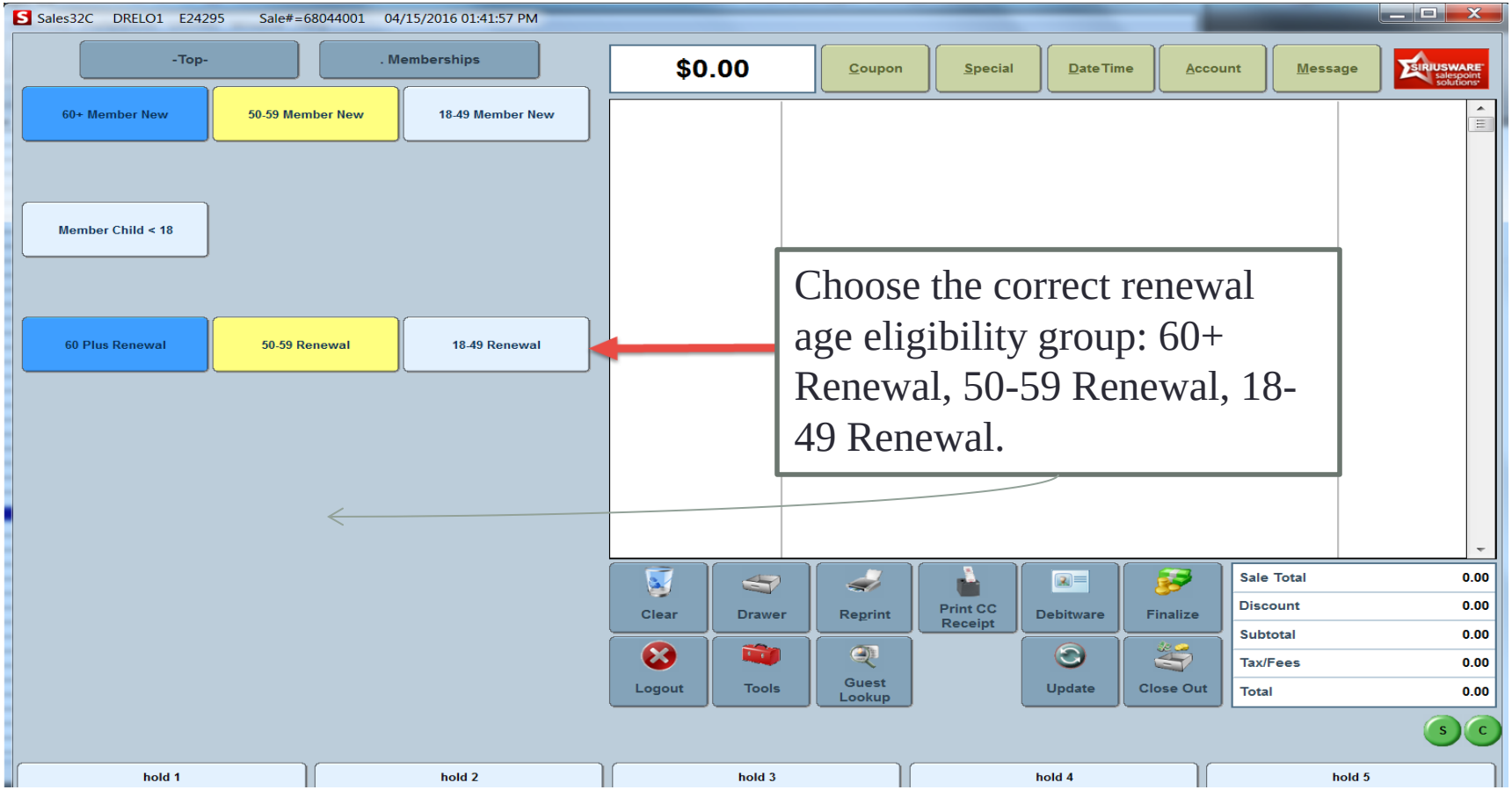
Click the appropriate age eligibility class renewal button. (e.g. 60+ Member Renew, 50-59 Member Renew or 18-49 Member Renew)



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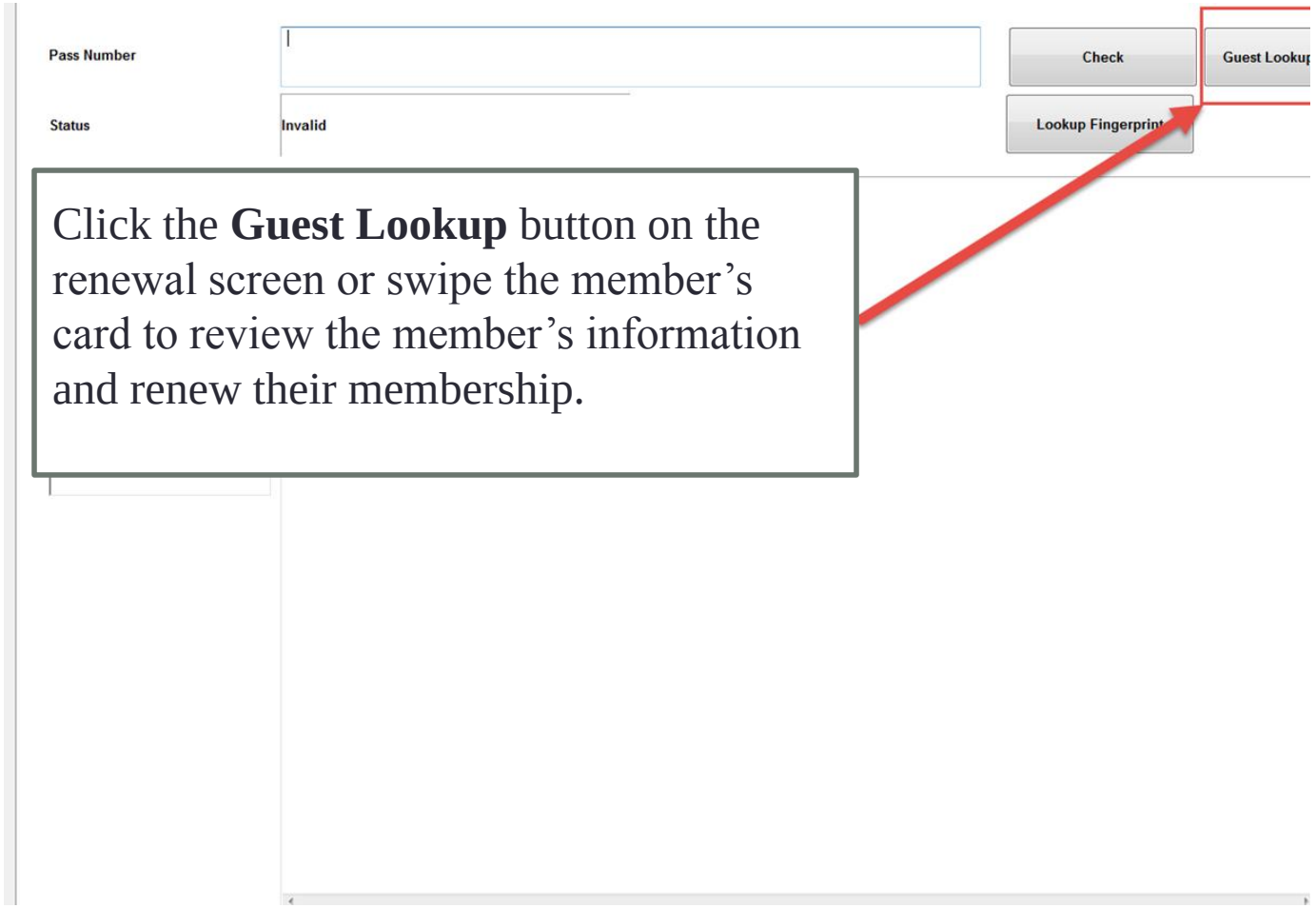

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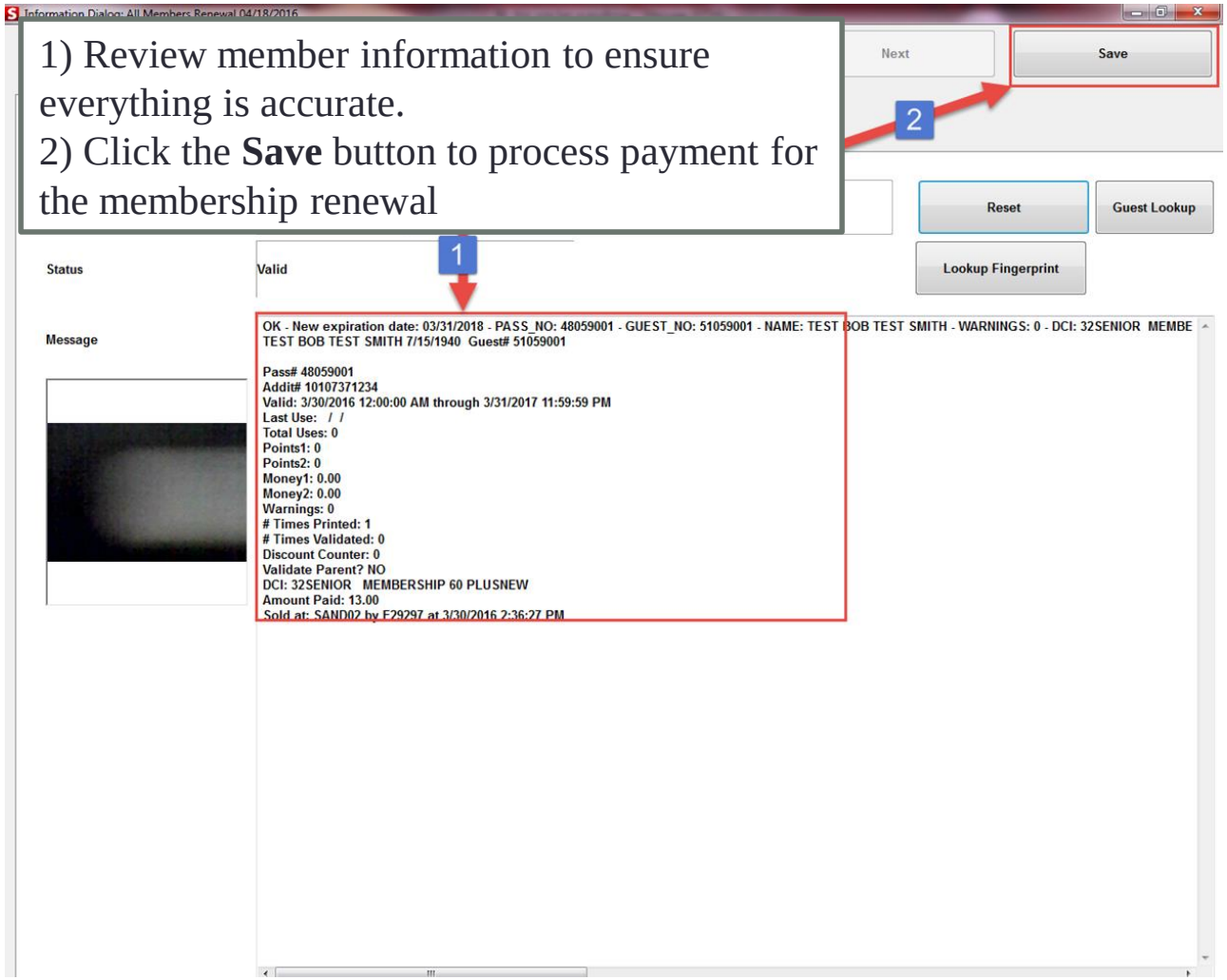

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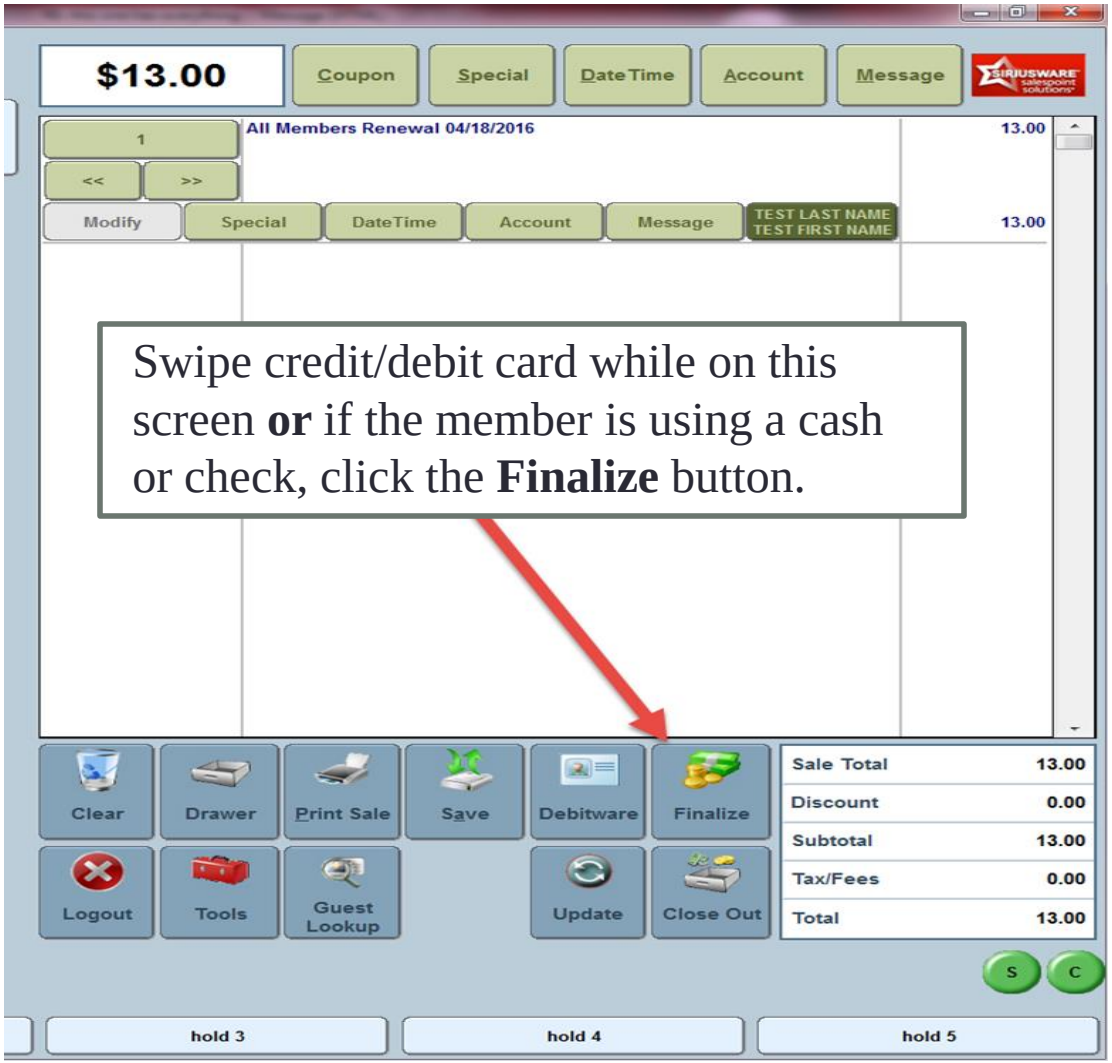
1) Accepting a Debit or Credit Card Payment



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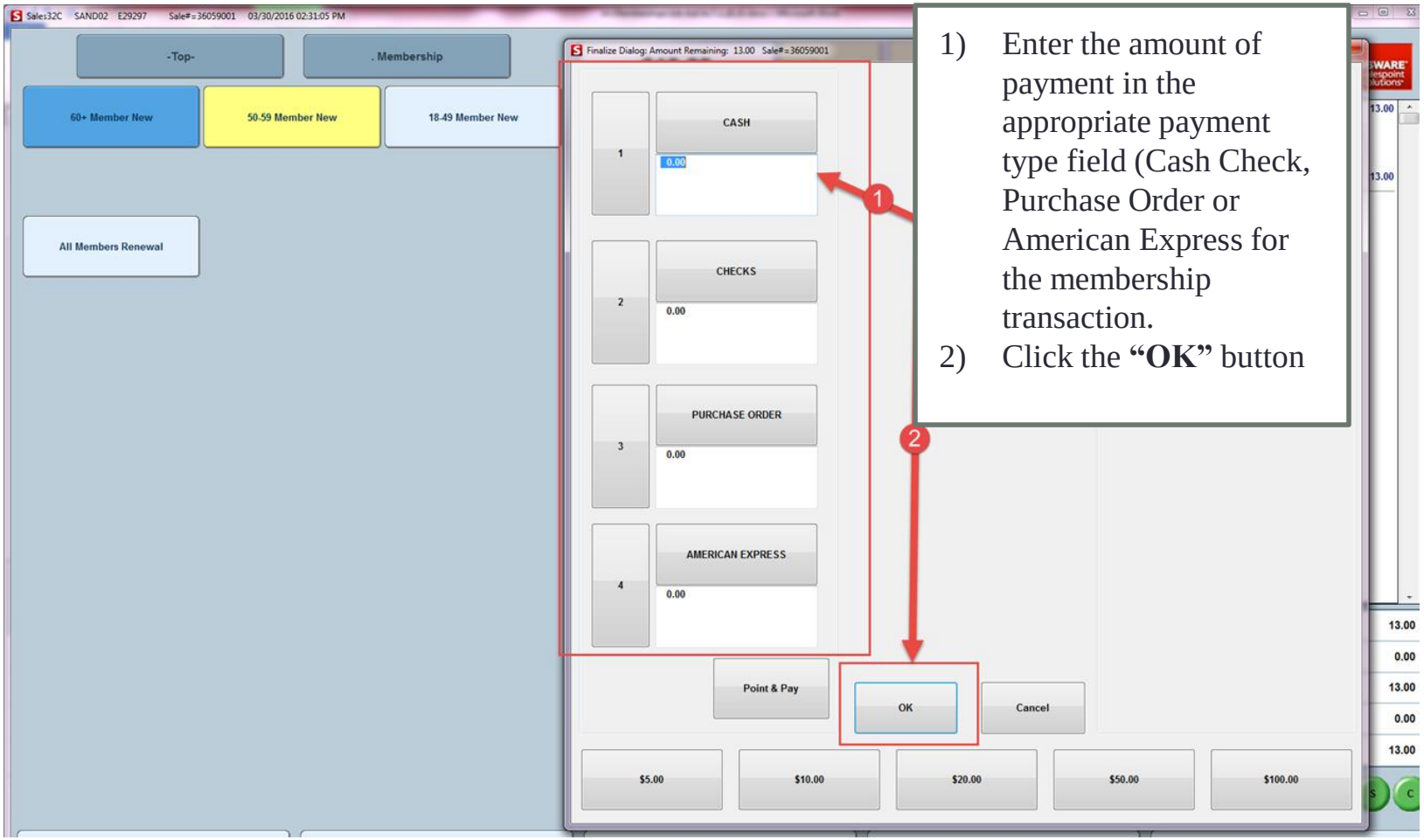

1) Enter the amount of payment in the appropriate payment type field (Cash Check, Purchase Order or American Express for the membership transaction.
2) Click the **"OK"** button

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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, 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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- Congratulations! You have completed Section 4- Renewing a DSA Membership for the DSA Memberships Course