



Using the “Authorized to Pick Up” Feature

If you are required to have a signature or record of who is picking up your members and wish to use Member Tracking System to record this information, the following steps will guide you thru the process of having the contacts show when the member is scanned out of your facility.

1. From the Main Menu click the Organization Information/Standards button, enter your name and click I Understand
2. Go to the Activities tab.
3. On the General Attendance Activity there is a check box for “A Parent/Guardian must be named to pick up a member from this Activity” Put a check mark in the box. (This can be used for any activity.)

The screenshot shows the 'Vision's Membership Registration' form. The checkbox 'A Parent/Guardian must be named to pick up a member from this Activity during Quick Entry check out' is checked and highlighted with a red box. Other visible fields include 'Find Activity', 'Active Only', 'Activity Description: General Attendance', 'Abbreviation: GenAtten', 'Activity Classification: General Attendance', 'Max # of Members Per Session: 0', 'Default Start Time: 2:30 p', 'Default Duration: 5:00', 'Account', 'Counts as Club Attendance', 'Force General Attendance', 'Track why Members leave this Activity', 'Early', 'Late', and a table of Fee Levels.

4. Close Organization Information/Standards
5. Go to individual member records that require a Parent/Guardian Pick Up. Choose *DOES* or *DOES NOT require a P/G Pickup* This must be changed to *DOES* for every member who needs it.

The screenshot shows the member record for John Alexander. The dropdown menu for 'This Member DOES require a P/G Pickup' is highlighted with a red box. Other visible information includes 'Unit: 02', 'John Alexander - 2', 'First Name: John', 'Middle: ', 'Last: Alexander', 'Nickname: ', 'Gender: M', 'Ethnicity: Caucasian', 'DOB: 03/13/2009', 'Age: 8.91', 'SSN: ', 'Residing at the: Alexander Household', 'Address: 51685 96th St N', 'City: St Petersburg', 'State: FL', 'Zip: 34695', 'County: ', 'Membership #: 2', 'Status: Active', and 'Schedule'.

6. Go to the Contacts tab and be sure that all who are authorized to pick up a member have a check mark in the “Auth To Pickup Member” box located at the bottom left hand corner. There is also a NOT Auth To Pickup Member for any contacts that are not able to.

The screenshot shows the 'Contacts' tab for a member. The checkbox 'Auth To Pickup Member' is checked and highlighted with a red box. Other visible information includes 'Member Info', 'Contacts', 'Medical', 'Sq Contacts', '1 Mother: Nancy Alexander', '2 Aunt: Nancy Alexander', 'Relationship to Member: Mother', 'Primary Contact (Available on Member ID Cards)', 'Parent/Guardian', 'Emergency Contact', and 'NOT Auth To Pickup Member'.

7. When scheduling the activity, make sure that the activity is set to Attendance Method In/Out.

Schedule Activities

Single Activity Scheduling Multiple Activity Scheduling

Unit Code: 01 - Downtown Unit

Activity: General Attendance (this activity DOES require a Parent/Guardian for pickup)

Location: Front Desk

Attendance method: In/Out

8. Go to Quick Entry, verify date and time with Yes Proceed to Quick Entry, Quick Entry Settings button at bottom of screen, click Station Settings 2 tab and change “Show Contacts during Scan Out” to YES, read the message and click ok on the popup box, click Save Settings and Close.

Quick Entry Settings

Station Settings 1 Station Settings 2 Station Settings 3 Station Settings - Sounds Fire Drill Reports Contact Settings System Settings 1 System Settings 2

Station Settings Page 2 NOTE: ALL settings on this tab apply to this machine only

Show Contacts during Scan Out: Yes Show Contacts' Pictures: No

Microsoft Access

Note: In order for contacts to show upon scanning out two additional settings must be set

1) In Organization Information/Standards, the activity must be marked as 'A Parent/Guardian must be named to pickup a member from this Activity'

2) On the Members screen, the member must be marked as 'This Member DOES require a P/G Pickup. If you need to mark multiple members you can use the 'Change Parent/Guardian Pickup' procedure.

OK

For Staff, Show Anniversary Date: [dropdown]

For Staff, Show Expired Certifications: Never

Show Member School: Always

Show Member Stars Balance: Never

Show Member School Grade: Always

This feature will slow the Quick Entry process.

Household Balance is at or above: \$100.00

Format of Credit Balances (ex): Balance: (Black)

9. After the member scans out and the staff confirms it is the correct member a screen will pop up showing all contacts. Choose the correct contact and make sure they are marked as yes, authorized to pick up.

Quick Entry - Station ID: 4

Who is picking up John Alexander?

Name	Relationship	Primary Contact	Parent/Guardian	Emerg Contact	Auth To Pickup Member	NOT Authorized To Pickup Member
Alexander, Nancy	Mother	X		X	X	
Alexander, Gracie	Aunt			X	X	

Signout Member with Selected Contact

Signout Member WITHOUT Parent/Guardian/Contact pickup

Cancel Sign Out / Pickup

10. Select sign out method, with or without Parent/Guardian/Contact Pickup

11. To view the record of who picked up a member:

- While in Quick Entry, click on Locate Member (Binoculars in top right corner), scan the card, type in the member number or the name
- OR Click on the Attendance Calendar and find the member you are looking for and double click on the x for the day in question.
- OR Go to the Members from the Main Menu, Click on the Calendars/Activities tab, find the day in question and double click on the x

NOTE: This feature will NOT work if you are using Unattended Operation for Quick Entry or if you are using simple attendance.