Handling Attendance-Based Wellness Memberships

with Version 2.08.3

Purpose

This document explains how to use the iGo Figure® Software Version 2 to handle memberships where the amounts due are based on attendance and an insurance company pays the dues.

Note: Version 3 of iGo Figure eliminates many of the steps required in this procedure, as it has advanced reporting and tracking features. Please visit igofigure.com and click Upgrade iGo Figure to upgrade your software to the latest version for free.

Create a Custom Member Type

To create a custom member type, simply perform the following steps:

1. From the More Options Menu, select **My Club Defaults**.
2. On the ***Custom*** tab, select *M-M* as the *Primary Member Type*, enter the name where it says *Enter New Member Type*, and click the button **Add New Member Type to List------>**.
3. Click **OK**.

This will allow you to select the custom membership for members who participate in this program.

Entering a Member

When you enter a member who is participating in this program, be sure to do the following:

1. Enter their membership type as "M-M: *Name*" where *Name* is whatever you called this program.
2. Extend their contract end date 90 days into the future.
3. Enter in the amount due at sign-up and monthly dues as 0.00.

Entering a Payment

When you receive verification that payment was received for a member, simply perform the following steps:

1. From the Main Menu, click **Payment**.
2. Click **Prepay or Month to Month**.
3. Select the member.
4. Input the amount received and extend the Contract End Date to 90 days into the future.

Note on Taxes:

If you have checked with your state's sales tax office and determined you need to report taxes on this revenue, when you enter the payment you will need to do the following:

1. Calculate the sub-total by dividing the amount you received for the member by 1.0XXX, where XXX is your tax rate.

   For example, let's say you received $40.00 for a member and the tax rate is 8.25%:

   40.00 / 1.0825 = 36.95

2. Input the calculated sub-total for the amount of the dues payment and select the appropriate sales tax category.

Create a Custom Report

To create a custom report, perform the following steps:

1. From the Main Menu, select **Reports**.
2. Click **Custom Report Generator**.
3. Click **I want to create a report**.
4. Type the name of the report as *Wellness Report* and click **OK**.
5. Enter whatever description you would like and click **OK**.
6. Enter the number 0 and click **OK**.
7. Check off the report field names *DetailedMember Type*, *FirstName*, and *LastName*, then click **Exit**.
8. Enter 0,2,1 (exactly like that, including the commas between the numbers) and click **OK**.
9. Place a check mark by each of the three fields *DetailedMember Type*, *FirstName*, and *LastName*, and click **Exit**.

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10. Enter 0,2,1 (exactly like that, including the commas between the numbers), and click **OK**.
11. You will see a message indicating that you have successfully added the report. Click **OK**.
12. Click **Close**.
13. From Report Category, select Member Reports.
14. The custom report just created, Wellness Report, will be at the bottom of your list.
15. Select Wellness Report and click on **Edit Custom Report** on the right.
16. Click **Set a Filter** next to DetailedMemberType.
17. From the Operator drop-down menu, select Equal To.
18. From the Value drop-down menu, select the name of the custom member type created.
19. Click **Add** when done and then click **Close**.
20. Click **Close**.

Reporting Attendance

To report attendance for these members you will perform the following steps:

1. From the Main Menu, select **Reports**.
2. Choose *Member Reports* from the *Report Category* drop-down menu.
3. Click *Wellness Report* from the bottom of the default iGo Figure reports.
4. Click **Preview**.
5. You will receive a list of all members participating in the program. Print this list.
6. Using your list, go to the member record for each and every member on the list. Click on the *Workout History* tab to view all the attendance data.

Report the attendance data for these members on CurvesCommunity.com.

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