

Handling Attendance-Based Wellness Memberships

with Version 3.6

Purpose

This document explains how to use the iGo Figure® Software Version 3.6 to handle memberships where the amounts due are based on attendance and an insurance company pays the dues.

Create an Attribute

To create an attribute, simply perform the following steps:

1. From the More Options Menu, select **Member Attributes**.
2. Click *Add a New Attribute*.
3. Input the name of the attribute and click **Save**.

This will allow you to select the attribute for members that participate in this program. Attributes allow you to pull attendance reports for these programs, print lists, and even send out mass emails.

Entering a Member

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

1. Enter them as a Month-to-Month member.
2. Extend their contract end date 90 days into the future.
3. Assign the appropriate attribute to the member.
4. Enter the sign-up fees and dues paid at sign up as 0.00.

Reporting Attendance

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

1. Double-click on the Attendance Detail by Attribute Report icon on your desktop.
2. Select the appropriate attributes and date range and click **OK**.
3. Report the attendance data for these members on CurvesCommunity.com.

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 **Payments and Product Sales**.
2. Select the member.
3. Click on the *Memberships* tab.
4. Click **Month-to-Month**.
5. Input the amount received and extend the Contract End Date to 90 days into the future.
6. Click **Next** twice.
7. Select **Accounts on File** for the payment method. If there is no account, add an account with the following information:
 - Create a bank account.
 - The Name on Account should be the name of the program. This information will appear in Money Management and will make processing payments easier at the end of the day.
 - The Routing Number and Account Number can be fake information (e.g., all 9999s)
 - Be sure to select Paper Draft and process these payments by themselves at the end of the day.

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.