





### Masters Swimming Clubs – Checks for Club Registrars in September of every year

Club: \_\_\_\_\_

Date of Check: \_\_\_\_\_

Task	Date to be completed by	Action	Check Done (tick)	Comment
Club fees for coming season to be finalised.	To be done during August	Club executive to set club fees for coming season.		
Update the club fee on the new 4 and 16 month subscriptions that have been distributed from the branch	31 <sup>st</sup> August	<ul style="list-style-type: none"> <li>• Go to SUBSCRIPTIONS/ SUBSCRIPTION TYPES find the subscription you want and click on the EDIT icon:  It will open more options.</li> <li>• Click on GENERAL Tab.               <ul style="list-style-type: none"> <li>○ You will see the 3 levels of payments with the Branch and National level shaded out as you can't change them. Insert your 'club fee' and update the 'total amount' payable.</li> <li>○ You may want to add a description in the DETAIL section, such as dates that this Subscription Type is available. This description will be visible on the members' portal for registration.</li> <li>○ Then click on SAVE at the top or bottom of the page.</li> </ul> </li> <li>• Click on FINANCIAL STATUS Tab. Click the radio button to: Yes – Financial End Date under Update Financial Status. Double check that the financial end date is 31 December of the current year for 4-month memberships and 31 December for the following year for 16-month</li> </ul>		Note: It does not automatically add the club fee to the total amount.

Task	Date to be completed by	Action	Check Done (tick)	Comment
		memberships.		
Open the 4 and 16 month subscriptions to the membership portal	1 <sup>st</sup> September	<ul style="list-style-type: none"> <li>Go to the SUBSCRIPTIONS/SUBSCRIPTION TYPES and click on the subscription you want to open by clicking on the EDIT icon. </li> <li>Click on the MEMBER tab.</li> <li>Make sure that “Include subscription in Member’s Section/Members portal” is turned to YES. This way it will be visible when your members log in to pay.</li> <li>Make sure that Members Types Default is set to SWIMMER. Click on SAVE</li> </ul>		
<b>IMGSTG ACTION</b> Remove 12 month subscription from the membership portal for the current year.	As soon as 4-month and 16-month subscriptions have been loaded to membership portal. (1 <sup>st</sup> September)	<ul style="list-style-type: none"> <li>Go to the SUBSCRIPTIONS/SUBSCRIPTION TYPES and click on the subscription you want to remove by clicking on the EDIT icon. </li> <li>Click on the MEMBER tab.</li> <li>Make sure that “Include subscription in Member’s Section/Members portal” is turned to NO. This way it will no longer be visible when your members log in to pay.</li> </ul>		








### Masters Swimming Clubs – Checks for Club Registrars in December of every year

Club: \_\_\_\_\_

Date of Check: \_\_\_\_\_

Task	Date to be completed on	Action	Check Done (tick)	Comment
Email your members a reminder that their membership is about to expire and that they can renew online after 1 <sup>st</sup> Dec. (DO NOT email your 16 month members)	1 <sup>st</sup> December	<ul style="list-style-type: none"> <li>Your Branch can send you an email template that you can use to send to your members.</li> <li>Or in some states your Branch will send out this reminder email from the Branch.</li> </ul>		Your branch secretary will tell you if they are sending a branch email.
<b>STATE ACTION</b> Export member information (if needed)	26 <sup>th</sup> November (In preparation for roll over on 1 December)	<ul style="list-style-type: none"> <li>Go to MEMBERS / EXPORT / ALL MEMBERS select your export template.</li> <li>Click on ACTIVE and FINANCIAL members.</li> <li>Click NEXT.</li> <li>Click EXPORT (it will export into excel for you to save)</li> </ul>		If your club needs 2012 member number information this will be your last chance to get it, all members switch to pending on 1 <sup>st</sup> Dec.
Update the club fee on the new 12-month subscription that has been distributed from the branch	29 <sup>th</sup> November	<ul style="list-style-type: none"> <li>Go to SUBSCRIPTIONS/ SUBSCRIPTION TYPES find the subscription you want and click on the edit icon:</li> <li>Click on GENERAL Tab.               <ul style="list-style-type: none"> <li>You will see the 3 levels of payments with the Branch and National level shaded out as you can't change them. Insert your 'club fee' and update 'Total Amount' payable.</li> <li>You may want to add a description in the Detail section, such as dates that this Subscription Type is available. This description will</li> </ul> </li> </ul>		Note: It does not automatically add the club fee to the total amount.

Task	Date to be completed on	Action	Check Done (tick)	Comment
		<ul style="list-style-type: none"> <li>be visible on the members' portal for registration.</li> <li>○ Then click on SAVE at the top or bottom of the page.</li> <li>• Click on FINANCIAL STATUS Tab. Click the radio button: Yes – Financial End Date under Update Financial Status. Double check that the financial end date is 31 December of the current year for 4-month memberships and 31 December for the following year for 16-month memberships.</li> </ul>		
Open the 12-month subscriptions to the membership portal	1 <sup>st</sup> December	<ul style="list-style-type: none"> <li>• Go to the SUBSCRIPTIONS / SUBSCRIPTION TYPES and click on the subscription you want to open by clicking on the EDIT  icon.</li> <li>• Click on the MEMBER tab.</li> <li>• Make sure that "Include subscription in Member's Section/Members portal" is turned to YES. This way it will be visible when your members log in to pay.</li> <li>• Make sure Member Type Default is set to Swimmer. Click on SAVE</li> </ul>		
<b>IMGSTG ACTION</b> Take the 4 and 16 month subscriptions off the member portal.	1 <sup>st</sup> December	<ul style="list-style-type: none"> <li>• Go to the SUBSCRIPTIONS / SUBSCRIPTION TYPES and click on the subscription you want to upload by clicking on the edit icon.</li> <li>• Click EDIT  on the Member tab.</li> <li>• Make sure that "Include subscription in Member's Section/Members portal" is turned to NO. This way it will be visible when your members log in to pay. Click SAVE</li> </ul>		Note: Make sure that your 12 month subscription is turned to YES.
Change the display dates to the new year	31 <sup>st</sup> December	<ul style="list-style-type: none"> <li>• Go to SUBSCRIPTIONS / OPTIONS</li> <li>• Click on the EDIT  icon.</li> <li>• Scroll to the bottom of the page, under the heading DISPLAY OPTIONS to choose your date range selection.</li> <li>• Click on the first calendar icon  and it</li> </ul>		

Task	Date to be completed on	Action	Check Done (tick)	Comment
		<p>will open up a calendar.</p> <ul style="list-style-type: none"> <li>• Choose September 2012 from the drop down list and click on the number 1.</li> <li>• Click on the second calendar after TO and choose December 2013 from the drop down list and click on the number 31.</li> <li>• Click on SAVE.</li> </ul>		
Archive previous years 4 & 12 month subscriptions	1 <sup>st</sup> January	<ul style="list-style-type: none"> <li>• Go to SUBSCRIPTIONS / SUBSCRIPTION TYPES find the subscription you want to archive and click on the EDIT icon: </li> <li>• Click on Other Options Tab and look for ARCHIVE. Click the dot onto YES. Click SAVE.</li> </ul>		Your previous year 12 month members should be renewed by this date. You will not be able to archive this subscription if you have any active and financial members against it.
Email a reminder to those members who have not paid their memberships	15 <sup>th</sup> January	<ul style="list-style-type: none"> <li>• Follow the instructions on the help sheet 'club help for sending emails' which can be found on the noticeboard when you first open the club console.</li> </ul>		