

MEMBERSHIP

SOP Title

Paper Membership Application

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operations

SOP Purpose:

To provide instructions on how to process a new member join

Applicability:

All Membership Staff, All Center Directors

Procedure:

1. Primary Adult Member Information

- a. This information is required even when setting up a youth membership
- b. Use Driver's License (or other valid ID) to obtain necessary information *This is only for ease of having the information in front of you. If they do not have an ID, communicate with member to get information needed. (Name, DOB, address)
- c. Complete all fields as applicable
- d. Email address is required to enable access to their Daxko account online to review waivers, register for programs, etc. You will need to ask member for this information
- e. Obtain emergency contact for primary adult, this should be someone outside of the household, this is a required field

2. Secondary Adult Member Information

- a. Anyone 25 years old or older
- b. Anyone 22 years old or older who is not a full-time student
- c. Use Driver's license (or other valid ID) to obtain necessary information
- d. Complete all fields as applicable
- e. If you are going to add an email address for the secondary adult, make sure it is a different email than the primary

3. Youth Members to Add

- a. Add any youth who will be active on the membership, you will need to ask the primary for name and birthdate, all other fields will pre-populate

4. Signing Waivers

- a. After all member's information is entered, the next step is having the primary sign the waivers for joining.
- b. Show the member the waiver, and have them sign the signature pad when ready

5. Membership Dues Set Up

- a. This is the page where you will add any applicable discounts or add-on fees

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- b. If adding corporate discount, work badge, ID, or proof of employment required and to be noted under primary on unit
- c. If adding military discount, Grade, Branch, and Expiration are required for Military ID verification and to be noted under primary on unit
- d. If adding financial assistance, qualifications to be noted under primary on unit
- e. All financial assistance, discount groups, etc must have expiration date or any special notes included in the Notes section of Daxko Operation

6. Financial Information

- a. Store monthly billing method
- b. Verify fees are correct

7. Finalizing Membership

- a. Take Pictures, issue key cards, collect pro-rated dues
- b. Ensure notes are completed to include any additional information under the primary on the unit – this could also include any interests, goals, medical conditions, etc. that came up during the tour/sign up

- 8. NO additional program registration is needed at time of sign up. MSO will audit all joins/renewals based off notes in Daxko and update accordingly.

Getting Help: Contact your Membership Lead

Related Information:

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