



Weekly Club Attendance Quick Start



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Club Weekly Attendance Module

1. Overview

The new Weekly Attendance function provides attendance tracking at the club and member level. The Club Secretary can ADD a new “meeting” in just a couple clicks, and then “check-in” the members attending with just one click per member. The system then calculates the correct percentage for this week’s attendance, and saves it for the generation of the “monthly attendance” percentage. It also generates weekly meeting sign-in sheets (with barcode option), Name badge inserts, detailed and summary reports by club and member.

The basic features of the Weekly Attendance Module are:

- 1-click monthly attendance entry
- Weekly attendance tracking down to the member level
- Correct RI COL 2007 attendance calculations
- Guest entries, with meal codes (Pay at door, Gratis, Charge the Member)
- Excused attendance absences and exceptions entry/tracking
- Meeting make-up entries by member (with meal code credits, when applicable)
- Barcode sign in sheets, and barcode scan entry.
- Integration with the optional Dues Module for member billing (based on attendance entries)

2. Version Changes

The Club Weekly Attendance module has been upgraded from the original release.

The following is a summary of the changes in this version:

2.1 RI COL 2007 Attendance Calculation

In 2007, the *Council on Legislation* passed a new rule that was not very well communicated regarding the attendance calculations. This change involves the **Rule-of-85** member types. Previously, these members were not considered in the attendance calculation whether they attended or missed a meeting. However per this most recent change in the rules, Rule-of-85 members now count in the attendance algorithm – but ONLY IF they attend the meeting.

The new calculation algorithm is:

$$\text{Attendance \%} = \frac{\text{Active Members Attending} + \text{Rule-of-85 Attending}}{\text{Total Active Members} + \text{Rule-of-85 Attending}}$$

Any excused members (per the club’s Board of Directors) are excluded from the Total Active Member count.

2.2 Dynamic Content Display

We now allow the user to choose how and what they would like to display on the Meeting Entry screen. Which columns, the number of columns, as well as sort order can all be easily specified by the user.

Show: MemberType MealCode Note Badge# MemberID In: 1-Col Sort By: Member

Attendance Summary: 0 of 22 (0.0%)

(ID=5583)

Add Guest

Reset

Edit

Save & Continue

Done

Member	Member Type	Meal Code
<input type="checkbox"/> Bagshawe, Nick	InAct-LOA	
<input type="checkbox"/> Bell, Bruce	Honorary	
<input type="checkbox"/> Benton, Selby G.	Honorary	
<input type="checkbox"/> Blackman, Ken Ph.D.	Active	Club Paid Meal

2.3 Guest Entries

We now record **guests** attending the meeting. Three (3) different types of guests can be recorded:

- Guest of Member
- Visiting Rotarians
- Guests of Club (aka, guest speaker)

Use the new [Add Guest] button to enter the guest information. The Guest information is recorded in the Notes field, and can be edited if needed, directly in this field.

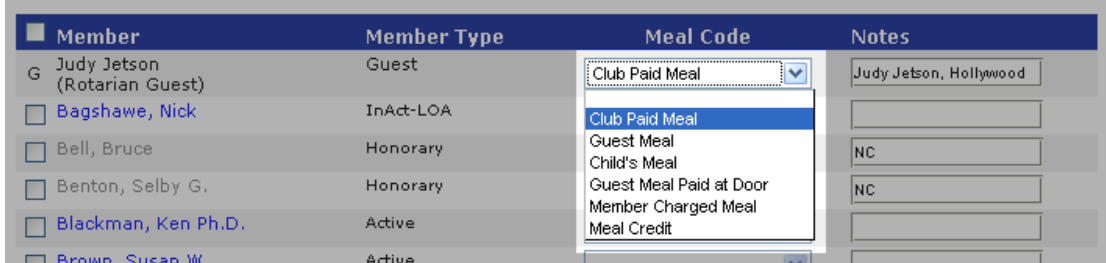
Guest Type: <input checked="" type="radio"/> Guest of Member <input type="radio"/> Visiting Rotarian Guest <input type="radio"/> Guest of Club (e.g., Speaker)	Guest Information: Guest Name: <input type="text"/> Guest of: { Select Member } Meal Code: Club Paid Meal
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2.4 Meal Codes

We now support and record **meal codes**. Meal codes can be assigned to members or can be assigned to Guests that attend the meeting. Meal Codes can also be assigned to member Make-ups, when they are entered. Meal Code information is accessible in the Dues Module to pull through and bill or credit members for meals.



Member	Member Type	Meal Code	Notes
<input type="checkbox"/> Judy Jetson (Rotarian Guest)	Guest	Club Paid Meal	Judy Jetson, Hollywood
<input type="checkbox"/> Bagshawe, Nick	InAct-LOA		
<input type="checkbox"/> Bell, Bruce	Honorary		NC
<input type="checkbox"/> Benton, Selby G.	Honorary		NC
<input type="checkbox"/> Blackman, Ken Ph.D.	Active		
<input type="checkbox"/> Brown, Susan W.	Active		

If additional Meal Codes are needed, they can be created by adding Club specific codes under the ADMIN tab, by the District Communications Officer (DCO, Lvl-7) in your district.

Attendance Meal Code Admin

View

ID	Meal Description	Position Sort	Modified	Created
1	Club Paid Meal	1		Mark Landmann 10/22/2008
2	Guest Meal	2	Michael Thacker 10/24/2008	Mark Landmann 10/20/2008
3	Child's Meal	3	Michael Thacker 10/24/2008	Mark Landmann 10/20/2008
4	Guest Meal Paid at Door	4	Michael Thacker 10/24/2008	Mark Landmann 10/20/2008
5	Member Charged Meal	5	Michael Thacker 10/24/2008	Mark Landmann 10/20/2008
6	Meal Credit	6		Michael Thacker 10/22/2008

2.5 Scanning Combined with Manual Attendance Entry

We have eliminated the separate page that was previously used to enter the "bar code" scans. This eliminates the need to go back and forth to correct entries. This change simplifies the whole process. So, unless you are using bar code scanning, just ignore this area on the screen.

Enter Member UserID: (Only used for Bar Code Scanning)

Notice: **BEFORE entering attendance**, review the member types and excused absences below. It is important that the right "Member Type" attributes AND excused absences are set **BEFORE** entering attendance. If you need change the member type or changed the excused absences, click [RESET] to reset the attendance values (this will also clear the attendance entered).

Show: MemberType MealCode Note Badge# MemberID In: 1-Col Sort By: Member

Attendance Summary: 0 of 22 (0.0%) (ID=5583)

Member	Meal Code	Notes
<input type="checkbox"/> Bagshawe, Nick		

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2.6 Attendance List Member Color Coding

To distinguish between the various MemberTypes that contribute (or not) to attendance, the Member Names are color-coded.

User, Name - in blue, UserName is Active AND contributes to attendance count. (see MemberType)
User, Name - grayed-out, UserName is Honorary or Excused and DO NOT contribute to attendance count. (see MemberType)
User, Name - in green, UserName contributes to attendance count - *only if attended*. (Ruleof85)
User, Name - in black, Guest Member and has no effect on attendance
User, Name - in red, MemberType was changed after creating the meeting. This is a User Error. Edit attendance or CLEAR reset attendance values.

2.7 Editing Attendance

An **incorrect Member Type** is the most typical problem that needs to be corrected via the Edit Member record function. To save you a lot of grief, we cannot stress enough, that you need to correctly identify all of the club members **MemberType FIRST!** Then, when the meeting is created, the system assigns the correct **MemberType** to each member's attendance record.

Why is this important? Only Active members contribute to attendance and per the new RI COL 2007 rule, Rule-of-85 members contribute ONLY if the Rule-of-85 member attends the meeting. Thus, correctly setting the **MemberType**, results in the correct attendance calculations for the club's weekly attendance percentage.

To correct one or more entries, you have two options:

- RESET** – By clicking on the [Reset] button at the top of the list, the attendance list is completely re-generated. By selecting this option, ***ALL attendance, Guest entries, meal codes, and notes will be LOST.*** Be sure this is what you want to do!
- EDIT** – By clicking on the [Edit] button at the top of the list, the system takes you to a page that displays all the members on the list. And, it highlights in red any member we believe that is an error condition.

For example, on the following list, Selby Benton is Rof85 (Rule-of-85) marked in red. This tells you that something is wrong with the Rule-of-85 setting. In this case, the meeting was generated BEFORE Selby was changed to a Rule-of-85 MemberType. Thus, any attendance recorded for Selby would be wrong until this condition is corrected. Also, notice that Selby's name in GREEN, further identifying him as Rule-of-85 MemberType.

Show Timestamps?

Attendance Summary: 1 of 20 (5.0%)

Add Delete Edit Done

Member	Member Type	Attend Type	Meal Code	Notes
Bagshawe, Nick	InAct-LOA			
Bell, Bruce	Honorary	No Count		NC
Benton, Selby G.	Active-Rule of 85	Rof85		Rof85
Blackman, Ken Ph.D.	Active			
Brown, Susan W.	Active			

Please review this list. If any member is in error, then click again on the [Edit] button on this screen, where the member can be edited. When you click on the [Edit] button, you

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will then have the opportunity to set/reset any of the data entries, as necessary. In this example, checking on the Rof85, indicates that Selby is considered a Rule-of-85 member in all calculations.

Edit Data Cancel Update

Member	Member Type	Attend Type	Meal Code	Notes
Bagshawe, Nick (77101740)	InAct-LOA	<input type="checkbox"/> Attended <input type="checkbox"/> Excused <input checked="" type="checkbox"/> Counts <input type="checkbox"/> Rof85 <input type="checkbox"/> Make-Up		
Bell, Bruce (77101721)	Honorary	<input type="checkbox"/> Attended <input type="checkbox"/> Excused <input type="checkbox"/> Counts <input type="checkbox"/> Rof85 <input type="checkbox"/> Make-Up		NC
Benton, Selby G. (77101723)	Active-Rule of 85	<input type="checkbox"/> Attended <input type="checkbox"/> Excused <input type="checkbox"/> Counts <input type="checkbox"/> Rof85 <input type="checkbox"/> Make-Up		Rof85

3. Best Practices

We recommend the following best practices:

- Use the **DaCdb** member functions to ADD new members and TERMINATE members as they occur.
- Generate the Weekly Attendance **meetings** as close as possible to the actual meeting day. It not advisable to generate the meeting records weeks or months in advance. By creating them as close as possible to when they occur, then problems with **MemberTypes** being correct are minimized, as well as having the correct NEW and TERMINATED members reflected in the weekly meeting "snapshot" of your club's membership roster.
- We recommend staying within the pre-defined, existing set of **Meal Codes**. Please contact Support, if there are questions, as there are programming considerations between this module and the Dues module.

4. SUMMARY

Submitting your **Weekly Attendance** could not be any easier, faster, or less stressful when using this module. Just make sure that the **MemberType** is correctly set for each member, and that all of your NEW and TERMINATED member maintenance has been put into the database before adding the weekly meeting "snapshot" of your club's membership roster. Then, just click on the [Submit Attendance] in Section 1 on the My Club screen.

- adding** your weekly meeting in just a couple of clicks (it knows your next meeting date), and
- then, just **clicking** on the people **present** at the meeting, the system correctly calculates the weekly attendance percentage, based on who was present and their **MemberType**. Checking in can be by either a "single mouse click" or by a bar code "scanner read".

Then, you are also able to submit your **Make-Ups** by Member (and denote "meal credits" when applicable), and record **Guests** attending the meeting. Also, you can send a PMAIL (#10, **Missed You**) to

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those ACTIVE members, who were absent in just a couple of clicks. And, this module keeps track of Perfect Attendance at the Member level.

Finally, reporting your club's monthly attendance to the district is a single mouse click. Just select the SUBMIT MONTHLY ATTENDANCE function from the left side navigation area. This function then submits your monthly attendance and also ***closes*** those weeks that comprise the monthly calculations being reported.