



**The YMCA of Greater Montgomery
Daxko Policies and Business Practices**

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Daxko Policy:

The association point-of-contact for DAXKO is Nicole May. Nicole will communicate all product enhancements, updates, and training material to each branch.

All questions concerning Daxko and Daxko policy at the branch level should be directed to the branch POC. Branch directors should designate POC's at their branch. Generally, this will be the office or business manager. If that person is unable to answer, the branch POC should forward the questions to the association POC. Operational and corporate group questions should be sent to Nicole May and Financial Development related questions to Debbie Forbus. Nicole will contact DAXKO if necessary.

Montgomery Super Users:

Membership, Childcare, and Programs: Nicole May

Corporate Groups: Nicole May

Financial Development: Debbie Forbus

In-Active Staff:

Once an employee leaves the YMCA, their username should be disabled immediately. The office manager should contact Nicole May to have this done. It is absolutely *imperative* this procedure happen in a timely manner.

New Welcome Center Personnel:

All new staff must attend a Daxko Online Training class.

Policy: Until a new staff has been properly trained, they are not permitted to work.

Once an employee is hired and properly trained, their username can be added to Daxko.

The office manager should contact Nicole May to do this. The new staff member's username will be their last name and first name. (Example:) A temporary password will be assigned.

If you work at multiple branches you will have to have multiple usernames. Please communicate with Nicole before you log in to any branch other than your home branch.

All welcome center staff will be required to attend a Daxko training (outside of the online training).

Branch Responsibilities:

- Entering new memberships and their draft information
- Updating Draft information as needed
- Renewing memberships
- Running the reports listed on page: 11
- Responding to all email reports and requests

Membership Team Responsibilities:

- Membership Terminations (Nicole May)
- Membership Downgrades (Office Managers)
- Membership Upgrades (Office Managers)
- All membership merges, moves, and deletions (Nicole May)
- All membership paperwork (draft authorizations, change forms, cancellations, membership forms and Corporate Groups) are to be sent to Nicole May.

Welcome Center:

When entering new members, please ensure the following:

- You have collected all data from the new member. **If the member does not completely fill out the form, please request the information again.**
- Data entry is consistent with association policy (upper case and lower case letters).
- All required fields are entered in Daxko.
- All Street, Drive, Boulevard, Avenues, etc. are completely spelled out.
- Montgomery is completely spelled out correctly.
- In the event that the fields are blank, please use the generic data provided in Daxko.

Youth Members:

Youth or teen memberships should have an adult as the 00 person (adult) on the unit. The youth member should be the 03 person (child).

In order to make the adult the 00 member, the user should enter the adult's information **FIRST**, then add the child and inactivate the adult after submitting the membership.

Check-In:

Any member who has a balance should be alerted that there is a message on their unit when they check in.

Other balances due will be handled at the discretion of each Center. Each center is responsible for instructing their Welcome Center personnel about proper procedure. Centers may opt to add an alert that check-in be denied if balance is not paid.

Member Service staff members should view the photo that appears on the screen during the check-in process. Members of the same family may

unintentionally switch membership cards and thus present the wrong card when checking into the center. If no picture is available, please request that the member allow you to take his/her picture. If more than one family member is checking in, be sure to check them all in.

If a member is denied access to the facility, politely communicate the reason to the member.

Balance Due: [\\$35.00](#)

[Edit](#) [Journal](#) [Billing](#) [Programs](#) [History](#) [Donations](#) [Cards](#)

Unit Information		Payment Process	
Unit ID:	80048039	Balance Due:	\$35.00
Unit Name:	Doe, John	Total Balance:	\$35.00
Branch:	Bell Road Family YMCA		
Membership Type:	Non Member		
Status:	Inactive		

Primary Contact

Name:	John Doe
Address:	111 Bill Lane Montgomery, AL AL
Phone:	(334) 272-2222
E-mail:	zbd@aol.com

Member ID	Member Name	Type	DOB	Gender	E-mail	Orig. Join Date	Notes	Details
80048039-00	John Doe	Adult	03/22/1990	M		-	(0)	

Annual Memberships:

When annual members are added to the system, Daxko automatically sets the member's regular renewal date to the first of the following month. Make sure the auto-renew button is checked to ensure the membership does not expire.

1. Membership Type Selection 2. Setup Members 3. Dues, Fees, Discount Groups 4. Review Information

Unit Information

Unit Name: Doe, Jane

Membership Type: Ys Choice Individual

Billing Method: Invoice

Billing Cycle: Annual Auto-Renew

Next Process Date: November 2015

One-Time Fees	Amount	Adj.	Due
Join Fee	\$50.00	\$0.00	\$50.00
Prorated Membership Due (Oct 23 thru Oct 31)	\$14.00	\$0.00	\$14.00
Membership Due (Nov 1, 2014 thru Oct 31, 2015)	\$564.00	\$0.00	\$564.00
Total Amount One-Time Fees:			\$628.00

Recurring Fees	Amount	Adj.	Due
Membership Due	\$564.00	\$0.00	\$564.00
Annual Fees starting November 2015:			\$564.00

Renewing Memberships:

Welcome Center personnel may renew (restart) the membership unit by clicking the status pencil on the Unit Information screen.

**Please ensure the member has a drafting method on file (select the calculator icon on the Unit Information screen.)*

Unit Information

Unit ID: 80048039

Unit Name: Doe, John

Branch: Bell Road Family YMCA

Membership Type: Non Member

Status: Inactive

Primary Contact

Name: John Doe

Address: 111 Bill Lane
Montgomery, AL AL

Phone: (334) 272-2222

E-mail: zbd@aol.com

Payment Process

Balance Due: \$0.00

Total Balance: \$0.00

Member ID	Member Name	Type	DOB	Gender	E-mail	Orig. Join Date	Notes	Details
80048039-00	John Doe	Adult <input type="text"/>	03/22/1990	M	<input type="text"/>	-	<input type="text"/> (0)	<input type="text"/>

Adult

Terminating Memberships:

The association requires a 30 day notice to cancel a membership. All corporate group terminations should be handled by Nicole May. Regular member cancellations should be sent to Nicole.

Welcome Center personnel **DO NOT terminate members.*

Placing Memberships on Hold:

Members wishing to place their membership on hold must speak with the branch Membership Director. Reasons should be closely monitored by the Membership Director. The maximum hold time is 60 days. After 60 days, their membership should resume its active status.

Waiving of Join Fee:

A member may have their Join Fees waived if they are renewing their membership within 30 of their last cancellation, have a letter of good standing from their previous YMCA, or they have a note from their doctor stating that he/she may return to the YMCA.

Guests Passes:

Types of Guests:

1. Local Guest
 - a. Guests staying within 50 miles of the YMCA may visit the YMCA with a member 2 times per year for a fee of \$5 each visit.
2. Out of Town Guest
 - a. Out-of-town guests living outside of 50 miles of the YMCA may visit with a member at no charge for up to two consecutive weeks. Guests must present a photo ID for admittance to the YMCA.
3. AWAY Member
 - a. A member of another YMCA outside of 50 miles of Montgomery may attend the YMCA for up to 30 visits a year. Guest must present a photo ID and their YMCA badge for admittance to the YMCA.

There are four necessary tasks for logging a guest visit in Daxko:

1. Search for the guest (not the member).
2. If the guest is not in Daxko, the user should enter the guest as a non-member.
3. Once the guest is entered, register the guest for a program called Guest.
4. Add an alert to the unit that indicates a guest visit has been used. All alerts begin that day and expire 12/31/current year.

Guest visits can be found quickly by viewing the Transactions on the Unit Information screen or by pulling a roster in Programs.

The Membership Director/Office Manager should pull the roster on a regular basis to ensure that guests are not exceeding the number of guest passes specified by the association.

Locker Rentals:

Locker rentals should be set up as a recurring fee. Downtown is currently the only Center with recurring locker fees.

The locker number should be entered into Daxko and referenced in Tools>Locker Distribution Summary.

Membership Payments:

Draft: All members (with the exception of annual members) must pay via EFT (checking or savings) or credit card draft. Annual members will pay upfront with the invoice option. There is no longer an installment option.

Draft Dates:

Daxko allows new members to choose which day of the month they want to be drafted. The system is currently configured to draft on the 1st or the 16th of the month. At the time of joining, Daxko will prorate the membership dues up to the selected date.

Returned Drafts:

- Returned drafts for membership payment will be handled by the Metro Office.
- Returned drafts for child care/program payments will be handled by the Metro Office.
- Returned checks for any reason will be handled by Karrie Stanford at Metro Branch.
- Returned pledges for any reason will be handled by Debbie at Metro Branch.

Draft Changes:

Members should notify the YMCA 30 days prior to their next scheduled draft in order to guarantee the change will be made. Notices received under 30 days are not guaranteed to get updated.

Nicole May is responsible for removing members from the pending batch. To ensure accuracy, draft cancellations **CAN NOT** occur at the front desk. All draft changes are to be processed by the Office Manager. All draft changes made will automatically update the pending draft.

Membership Financial Assistance:

1. Potential member applies for assistance at a center.
2. Be sure to date and note the center on the last page of the forms where indicated.
3. The center processes the application and grants a percentage.
4. Potential members arrive and present letter of award.
5. Add the member into Daxko and place in the correct discount group.
6. Be sure the draft information is set BEFORE discount groups are added or the discount group will be removed when the draft is set up.

1. [Membership Type Selection](#) 2. [Setup Members](#) 3. [Dues, Fees, Discount Groups](#) 4. [Review Information](#)

Unit Information

Unit Name: Doe, Jane

Membership Type: Ys Choice Individual

Billing Method: Draft Day: [Add](#)

Billing Cycle: Auto-Renew

Next Process Date: December 2014 [Edit](#)

One-Time Fees		Amount	Adj.	Due
	Join Fee	\$50.00	\$0.00	\$50.00
	Prorated Membership Due (Nov 6 thru Nov 30)	\$39.00	\$0.00	\$39.00
Total Amount One-Time Fees:				\$89.00

Recurring Fees		Amount	Adj.	Due
	Membership Due	\$47.00	\$0.00	\$47.00
Monthly Fees starting December 2014:				\$47.00

[Cancel](#) [Discount Groups](#) [Recurring Fees](#) [Submit](#)

Programs

Non-Member Memberships:

Individuals who do not wish to purchase a membership will still be added to the system. They should be added as a non-member. For youth program participants, the primary non-member should be listed **FIRST** as the parent. The youth program participant should be the person registered for the program.

Program Setup:

Nicole will create and edit sessions/segments for current or future programs. Staff members at each branch are not to add Activity Groups, Categories, or Programs.

If you need an Activity Group, Category or Program added to Daxko, submit a Program Request Form to Nicole no less than 2 weeks prior to the beginning registration date.

Program Financial Assistance:

Program Financial Assistance will be handled the same way as Membership Financial Assistance with the exception of individuals wishing to participant in a program such as child care.

Finance

Member Payments:

Close Outs are to be done daily. Supervisors should ensure this task is performed.

***Deposit date setting should be changed to match that of the day the money was closed out.

****This will be monitored by the Metro Office.***

Deposits:

Deposits should be done daily. A copy of the deposit ticket printed by Daxko and a copy of the actual deposit slip stamped by the bank should be emailed, faxed or brought to Karrie Stanford at Metro for posting.

EFT:

Members may use their current draft information on file to draft via EFT when purchasing merchandise or various other items from the front desk.

Credit Cards and Daily Drafts will not show up on the Shift Close Out because they are payments being processed by Daxko. Only cash, paper checks and money orders will be closed out. Money orders are entered as checks not cash.

Reconcile Date: 10/23/2014

	Reconciled Payments	Total Payments
Check	\$0.00	\$119.00
Cash	\$0.00	\$0.00
Total		\$119.00

Check Cash

Check All-Clear All

Y/N	Check	Amount	Unit Name	Payment Date	Received By
<input type="checkbox"/>	26813	\$1.00	Doe, John	10/23/2014 3:59 PM	Kristin Brown
<input type="checkbox"/>	5916	\$61.00	Cosby, Kiana	10/23/2014 4:02 PM	Kristin Brown
<input type="checkbox"/>	9843	\$57.00	Johnson, Alfonso	10/23/2014 4:03 PM	Kristin Brown

Cancel Close-out

Invoices:

Invoices for annual memberships will be generated at the branch level and be sent to the appropriate members by mail.

Returned Payments:

Returned check payments will be handled by Metro. Metro will enter all returned checks in Daxko and the returned amount will be added back to third party subsidy. Branches will be able to see which checks have been returned in the Returns Manager. Be sure to claim the returns that you work on and follow up by marking them as paid, written off, cancelled, etc. in the Returns Manager.

Refunds:

When members need a refund, staff should offer the option to have a system credit first.

The second option is to refund the member according to the original payment method. Office Managers must process this request by cancelling the program, setting the refund to return to CC or EFT, and emailing request to Karrie Stanford at Metro to approve the refund in Daxko.

Participant		Registration	
Smoke, Brianna (80048649-02) 104 Shawnee Drive Wetumpka, AL 36092 (334) 221-1096 Registered by Cindy Clark on 09/19/2013		(17) Cheerleading - 2013 Fall Cheerleading Wetumpka Family YMCA Mon. Tues. Wed. Thurs. Fri. Sat. No Time Specified Contact: Scot Patterson (334) 567-8282	

Description	Fees	Discount	Paid
(17) Cheerleading - 2013 Fall Cheerleading (10/01/13 - 11/30/13)	\$110.00	\$44.00	\$26.00

Payment Type	Payment Date	Paid	Refund Method	Refund Amount
Cash	10/08/2013	\$26.00	System Credit	\$ 26.00

[← Back](#) [→ Submit Refund for Unit](#)

When a YMCA paper check is necessary, the branch will enter the request in Daxko and notify Zahra Ghaderi by paper check request. The corporate office will approve and process the check request, then enter the check number in the appropriate field to indicate payment has been made.

Financial Development

Campaign Setup:

Debbie will set up each Center's campaign.

Payroll Deduction:

The Payroll Department will send a monthly report to Debbie Forbus detailing who donated and how much. This will be entered by Debbie Forbus.

**An employee must be flagged as an employee in Daxko in order to have the option of payroll deduction.*

Anonymous Donors:

Members who choose to donate anonymously will have their pledge entered onto their unit record. In order to keep the donor's name private, the Recognition Name on the Create Pledge screen should be entered as "Anonymous".

Age Notification Report (Monthly)

Tools>Browse Reports>Member Information>Age Notification

Look for members who will be graduating from one membership type to another. Example: Search for members turning 16 to bring them from a youth membership type to a young adult membership type.

Credit Card Expiration (Monthly)

Tools>Browse Reports>Member Information>Mailing List

Find members who are drafting from credit cards that will expire so you can get current billing information.

Collection Manager (Weekly)

Finance>Operations>Collection Manager

The Collection Manager allows you to keep tabs on those that owe money for membership or programs.

Membership Dues Reminder (Monthly)

Tools>Browse Reports>Member Information>Membership Dues Reminder

Print invoices for the upcoming month using the Membership Dues Reminder.

Active Members by Membership Type Report (Bi-Monthly/Weekly)

Tools>Browse Reports>Member Information>Active Members by Membership Type

Make sure that the members are getting only what they pay for by searching for units with too many active members.

Termination Summary (Monthly)

Tools>Browse Reports>Member Information>Member Termination Summary

Monitor why members are leaving so measures can be taken to reclaim those members.

Branch Membership Summary Report (Monthly)

Tools>DAXreport>Shared Reports>DAXreport Library>Branch Membership Summary Report

Look at membership numbers per membership type for the entire association or just your branch.

Branch Executive Reports

Cash Flow By GL/Type (As Needed)

Finance>Operations>Cash Flow (GL) or (Type)

Monitor the activity of a specific General Ledger account.

Branch Membership Summary Report (Monthly)

Tools>DAXreport>Shared Reports>DAXreport Library>Branch Membership Summary Report

Look at membership numbers per membership type for the entire association or just your branch.

Branch Termination by Reason for Active Members (Monthly)

Tools>DAXreport>Shared Reports>DAXreport Library>Branch Termination by Reason for Active Members

Look at active members who are set to terminate in the near future and preemptively reclaim their business.

Program Session Optimization (Monthly)

Tools>Browse Reports>Program Activity>Program Session Optimization

See how often program registrations are reaching their goal and their minimum numbers. These numbers must be provided on the Program Request Form in order for this to work.

Collection Manager (Weekly)

Finance>Operations>Collection Manager

The Collection Manager allows you to keep tabs on those that owe money for membership or programs.

Facility Usage – Access Denied (Weekly)

Tools>DAXreport>Shared Reports>DAXreport Library>Facility Usage – Access Denied

See a list of members who were denied access to the facility by Daxko.

Membership Sales & Activity (As needed)

Tools>BrowseRreports>Member Information>Membership Sales and Activity

Displays the number of new memberships, renewed memberships, terminated membership, and total visits within a specified time frame

Scholarship Adjustment Summary (Weekly)

Tools>BrowseRreports>Financial>Scholarship/Adjustment Summary

Provides a list of members who have received adjustments separated by their discount group or program financial assistance adjustment.



The YMCA of Greater Montgomery Daxko Policies and Business Practices

Failure to follow these guidelines will result in disciplinary action as outlined in our personnel manual. The first offense will result in an oral warning; second offense written warning with a possible suspension without pay and the third offense will result in termination. A staff member who quits while suspended will not be eligible for rehire. As always the Montgomery YMCA reserves the right to immediately terminate any employee for failure to perform assigned tasks or the endangerment of our members or participants.

I have read, understand, and agree to follow the guidelines listed above at all times.

Printed Name: _____

Signature: _____

Date: _____