

MEMBERSHIP

SOP Title

Membership Change Agreements

Page 1

operations

SOP Purpose:

To provide direction on required steps for different types of membership changes. All members should be directed to submit a change request form on the website but the instructions below are for when a change must be made in the branch.

Applicability:

Membership Lead, All Membership Staff, All Center Directors

Procedure:

Before registering for any Membership Change Agreements, Look up the member in Daxko Operations and review alerts and notes. Determine if the member has any discounts or add-ons. Take note of current membership rate and draft date.

1. Membership – Add-Ons

- a. Complete required selections
- b. Type your initials
- c. Click the “Next” button
- d. Have member read agreement, sign, and click the “I agree” button
- e. Click the “Register” button
- f. Note the account under the primary member

2. Membership – Billing Method Update

- a. Complete required selections
- b. Type your initials
- c. Click the “Next” button
- d. Have member read agreement, sign, and click the “I agree” button
- e. Click the “Register” button
- f. Complete the change in Daxko Operations
 - i. Swipe card or check through reader
 - ii. Confirm billing address
- g. Note the account under the primary member

3. Membership – Discount Groups

- a. Select the appropriate change option
 - i. Corp
 - ii. Military
 - iii. Other
- b. Type the Discount Group Name - For Military include Branch and Rank
- c. Enter expiration date if required

Issue Date:	4/29/2020	SOP Number:	
Effective Date:	4/29/2020	Department of Origin:	Membership
Approve By:	Leah Rapp		

MEMBERSHIP

SOP Title

Membership Change Agreements

Page 2

operations

- d. Type your initials
- e. Click the “Next” button
- f. Have member read agreement, sign, and click the “I agree” button
- g. Click the “Register” button
- h. Apply discount to membership
- i. Note the account under the primary member

4. Membership – Financial Assistance

- a. Complete required selections
- b. Type your initials
- c. Click the “Next” button
- d. Have member read agreement, sign, and click the “I agree” button
- e. Click the “Register” button
- f. Apply discount to membership
- g. Note the account under the primary member

5. Membership – Hold

- a. Enter start and end dates for the hold – Memberships may be placed on hold for up to 4 months in a calendar year
- b. Select the reason for hold request
- c. Type your initials
- d. Click the “Next” button
- e. Have member read agreement, sign, and click the “I agree” button
- f. Click the “Register” button
- g. Note the account under the primary member
- h. Hold requests are processed by MSO

6. Membership Type Changes

- a. Select the appropriate change option
 - i. Membership Changes – Add/Remove Family, Upgrade/Downgrade
- b. Complete required selections
- c. Type your initials
- d. Click the “Next” button
- e. Have member read agreement, sign, and click the “I agree” button
- f. Click the “Register” button
- g. Complete the change in Daxko Operations
 - i. When adding a member who is present, take their picture and issue scan card if they are old enough and will be scanning in by themselves.
 - ii. If you are adding an adult or youth (age 18+) verify their ID.
 - iii. If you are removing a member without changing the membership type make sure to update the Active Member field in the Member Info Tab
- h. Note the account under the primary member

Issue Date:	4/29/2020	SOP Number:	
Effective Date:	4/29/2020	Department of Origin:	Membership
Approve By:	Leah Rapp		

MEMBERSHIP

SOP Title

Membership Change Agreements

Page 3

operations

Getting Help: Contact Your MED or Shared Services

Related Information: One-Time Fees, Name and Address Data Entry

Issue Date:	4/29/2020	SOP Number:	
Effective Date:	4/29/2020	Department of Origin:	Membership
Approve By:	Leah Rapp		