

## Family Unit Reporting Screens

Family Units can be reported in two ways:

1. Add or Update membership screen.  
See documentation below.
2. Club – Family Unit link. Go to page 2 of this document.

**TIP:** Enter the Head of Household first. Enter Family members belonging to the Head of Household after the Head of Household record is processed.

### Membership – Family Unit

#### Add a New Club Member

To add a new member to the roster, click Add a Member link. On the Basic information screen you will need to click Yes or No for Family Unit. If the new member is part of a Family Unit do the following:

- Click on the Yes radio button for Family Unit and proceed to fill in the information for the new member.
- When done entering the Basic member information click on the Save Member button or Family Unit tab.

The Family Unit screen is now displayed. If the member is the Head of Household, click the Head of Household box as shown below.

The screenshot shows the 'Family Unit Information' screen for member KEITH HACKNEY (22) at MESA HOST (8656). The 'Head of Household' checkbox is checked and circled. The 'Family Unit' dropdown is set to 'KEITH HACKNEY (22)'. The 'Relationship Type' dropdown is set to 'Head of Household'. Other fields include 'Relationship Documentation', 'Address Documentation', and 'Year of Birth' (1935). Buttons for 'Member Sponsor', 'Member Basic', 'Save Member', and 'Cancel' are visible at the bottom.

If the family unit member is not the Head of Household, click the down arrow by the Family Unit box and click the name of the Head of Household in the list as shown in the screen below:

The screenshot shows the 'Family Unit Information' screen for member SHIRLEY HACKNEY (18) at MESA HOST (8656). The 'Family Unit' dropdown is open, showing a list of names: SHIRLEY HACKNEY (18), ANTONIO FERREIRA (19), KEITH HACKNEY (22), and Barbara Worthington (25). The 'Relationship Type' dropdown is set to 'SHIRLEY HACKNEY (18)'. Other fields include 'Relationship Documentation', 'Address Documentation', and 'Year of Birth' (1937). Buttons for 'Member Sponsor', 'Member Basic', 'Save Member', and 'Cancel' are visible at the bottom.

Enter the Relationship Type, Relationship Documentation and Address Documentation. Enter the Year of Birth if not already displayed.

To complete adding the new member:

- Click Member Sponsor button and enter the new member sponsor information.
- Click Save Member.

The new member will be added to your club roster as well as the Family Unit.

#### Update Existing Member

To Update an existing member as belonging to a Family Unit do the following:

- Click on Update a Member's Information link
- Click the Yes radio button by Member of a Family Unit.

- Click the Family Unit tab or Save Member button.
- Select Head of Household and enter Family Unit verification.
- Click Save Member.

The Membership selection screen will display when the update process is complete

## Club – Family Unit

Click the Club link. Click the Family Units link. The Family Unit page is displayed.

### Creating New Family Units

To enter a new Family Unit click on the New button as shown below.

The Family Unit Maintenance screen is displayed as shown below.

To create a Family Unit:

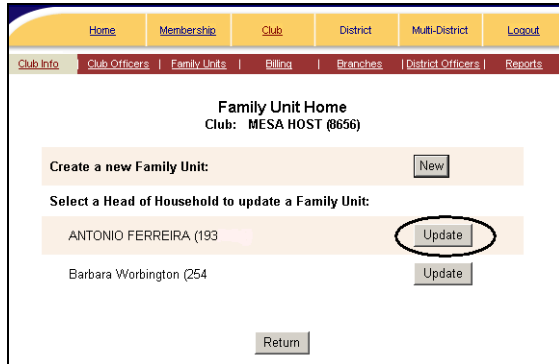
- First select the Head of Household by scrolling through the list of members and clicking on the Head of Household radio button. Select the appropriate verifications and enter the birth year if it is not filled in.
- Next scroll through the list and click on the square check box to select members that belong to this family unit. Select the appropriate verifications and enter the birth year if it is not filled in.
- Scroll to the bottom of the screen and click the Save button as shown below.

**TIP:** Complete one Family Unit at a time. Up to five members, including the Head of Household, can be selected per Family Unit.

Once the Family Unit is Saved you will be returned to the Family Unit Home page. Enter another Family Unit or click the Return button to go back to the Club Administration Home page.

## Update Existing Family Unit

You can add or delete family members from a Family Unit by clicking on the Update button as shown below.



Select additional Family Unit members by clicking the “Add To/Remove From Family Unit” check box. Or you can remove Family Unit members by clicking on this checkbox. Click the Save button when you are done with your Family Unit updates.

## Deselect Head of Household

The Head of Household can be deselected by doing the following:

- Click on the Update button for the Head of Household you wish to deselect.
- Deselect all members in this Family Unit and click the Save button
- After the deselected members are done processing, deselect the Head of Household.
- Click the Save button.

The Head of Household unit will no longer be listed on the Family Unit Home page.