Requirements: The basic program/membership database contains these areas:

1. Main table of clients:

* Contact info
* Emergency contact info
* Field containing last database activity date (necessary for mailings)
* Some way for the system to check for duplicates when entered
* Field for whether clients should be mailed or not
* Field listing for whether mailing address is valid (I would like to continue the functionality of the current database, which runs a query overnight against USPS to determine valid/invalid mailing addresses. We have to deal with a lot of returned mail because apartment numbers are not entered, and it is hard to validate for them at entry time because many correct addresses don’t have apartment numbers. The VBA code is on the next page)\*
* Family connection: Ability to connect clients together to create family units. This is not in the current database. If we ever connect this database to our accounting system this will probably be the field that does it, as the accounting system is based more on family unit than individual.

1. Registrations:
   1. Membership registrations:

* Membership type
* Membership registration and expiration date
* Receipt number
* Fee paid

* + For family membership, we need a table to list family members in the membership, their relationship in the family and age.
  + Area for expiration survey with ability to add multiple reasons for client not renewing
  1. Program registrations:

List of programs to register for, each program includes:

* department
* program name
* semester (fall, winter, spring, summer)
* fiscal year
* description
* Class size maximum
  + Ability for client to register for a program. A registration record should also have the ability to contain:
    - There are programs that have a choice of subclasses that one can choose between. Please see the Excel file named ‘Campfun Example’ to see a sample of this. This is a program called ‘Campfun’, where a child can be enrolled in a choice of programs during each hour of the day. You can see the hours listed across the top - there are 5 slots - and the choice of programs in each hour have their rosters listed vertically. We need a way to keep track of this and create reports that can show the time slots column-wise instead of one class per page, which is voluminous.
    - Programs registrations may need a wait list as well.

* 1. Social Service Registrations

List of programs to register for, each program includes:

* + - department
    - program name
      * ability for client to register for a program. A registration record should also have the ability to contain:
      * static demographic fields section
      * date-related and progress notes fields.
      * the choices in the sections above should be customizable per program type
      * assignment to staff member with case open and close date

1. Reports:

Mailing labels or excel lists by family or client, based on age or program, and based on date of last activity (to avoid mailing to stale clients)

We need to generate class rosters, there may be a need to have multiple rosters on one page for easier viewing (especially true for programs that have sub classes, like Campfun above). These probably will be used more for screen viewing than printing.) Having multiple rosters on a page makes it easier to see openings between programs. For example, If we have 3 beginners’ swim programs we can easily compare which classes have empty slots.

Other reports to be determined.

\*VBA CODE for USPS:

This is the VBA code I use to check for invalid mail addresses. It takes addresses of people with last activity within the last 10 days and sends the address in the URL to the USPS mailing address validation page and matches text in the reply page to see if the address is valid.

Dim IntResponse As Integer

Dim GetHTML As String

Dim POS As Integer

Dim POS2 As Integer

Dim POS3 As Integer

Dim rs As DAO.Recordset

Set rs = CurrentDb.OpenRecordset("SELECT tblMain.Address, tblMain.City, tblMain.State, tblMain.PostalCode, tblMain.LastActivity, tblMain.InvalidAddress FROM tblMain WHERE (((tblMain.LastActivity)>Date()-10)); ")

Set HTML = CreateObject("MSXML2.XMLHTTP")

'Check to see if the recordset actually contains rows

If Not (rs.EOF And rs.BOF) Then

rs.MoveFirst

Do Until rs.EOF = True

'On Error Resume Next

'validate address from USPS

If Len(rs!Address & "") > 0 Then

With HTML

.Open "GET", "https://tools.usps.com/go/ZipLookupResultsAction!input.action?resultMode=0&companyName=&address1=" & rs!Address & "&address2=&city=" & rs!City & "&state=" & rs!State & "&urbanCode=&postalCode=&zip=" & rs!PostalCode & "", False

.Send

GetHTML = .ResponseText

End With

POS = 0

POS2 = 0

POS3 = 0

POS = InStr(GetHTML, "Several addresses matched the information you provided. Perhaps you didn't enter a street number or the building has multiple units.")

POS2 = InStr(GetHTML, "The address you provided is not recognized by the US Postal Service")

POS3 = InStr(GetHTML, "Unfortunately, this address wasn't found")

If POS > 0 Or POS2 > 0 Or POS3 > 0 Then

rs.Edit

rs!InvalidAddress = True

rs.Update

Else

rs.Edit

rs!InvalidAddress = False

rs.Update

End If

End If

'Move to the next record.

rs.MoveNext

Loop

Else

'MsgBox "There are no records in the recordset."

End If

'MsgBox "Finished looping through records."

rs.Close 'Close the recordset

Set rs = Nothing 'Clean up

'END CHECK AGAINST USPS ===================================================