Meeting Notes

# Wednesday, June 15, 2016

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| **Start Time** |  | **2:37 PM** |
| **Members** |  | Kelly Murphy  Justin Goulet  Bonnie Elliot |
| **Adjournment Time** |  | 3:42 PM |

## *Purpose of Meeting*

*To determine the current status of the Trainer System, what steps need to be completed next, and a review of policies that will be included.*

Agenda:

Review the Customer’s Module

* Finalize the “Before We Continue” Notes
* Verify the topics covered in the “Change Client Birthday”
* Determine usefulness of the reading check
* Finalize/adjust questions on final exam

Review the Enrollment Module

* Finalize the “Before we Continue” Notes
* Verify the topics covered in “Basic Enrollment Procedure”
  + Also review when the “Account Balance” slides should be shown
* Transfer Policy – What is the formal statement we should tell our staff?
  + I left this section blank within the “Before we Continue” Notes
* Aquatics Enrollments – Is there anything different?

Review the POS Module

* Discuss “Before We Continue” Points of interest:
  + Food/Beverage, Open Play, Merchandise, Permits, Special Event Items
* Review Policies and Procedures documents, posted on LITMOS.
  + **Still need to learn Concession Merchandise and Lagoon Permits

Meeting Notes:

* Change all fonts to SF Text or Calibri (The City’s primary font)

Customer Modification Notes:

* Create Account policy –
  + We don’t want to turn away any customers. If they have not created an account yet, they may create an account at the front desk.
  + If there is a line at the front desk, help those with an account first, then create the account for the patron. You, as a staff member, may input all needed information with the exception of their password and security questions.
* Merging Accounts –
  + When merging accounts, we do not need to submit the additional account information. Less is sometimes better. Just include their primary account information and provide the discrepancies.
* Customer Modification –
  + Zip code allows for the resident rate. When the account is initially created, the zip code provided determines the eligibility. If there is an issue, or an updated address, please check the “resident” checkbox accordingly.
* Advanced Issues –
  + If there are any advanced issues, inform a RAM of the needed details. For example, if a family has multiple last names on the account for their children, their account may need to be divided.

POS:

* Lagoon POS module needs to be added
* Open Play:
  + Open play print receipt policies
  + Weekend Money processing at facilities.

Registration:

* Introduce instructor approval in the registration module.
  + Supervisor and/or instructor approval may be needed for age override. Usually, the age cushion is one month, however, this may vary per location.
* Check Workstation
  + At the beginning of every module instruction, include the changing of workstations.
* “Access My Account”
  + This feature currently may not work, but it should be included the course. This is a great tool to show clients how to enroll in activities, reserve picnic locations and manage their permits – among other important items.
* Update refund policy within the training course.

Intro to ActiveNet:

* Broad overview course
  + Should include what each tab bar/navigation item does – among other hints
  + “Help” within the current page shows help if needed.

Else: 5-10 Questions per module, focus on Policy