

## F110: Membership Freeze

(Covers freezing a membership, inspecting previous membership freeze history, inspecting current membership freeze history, and terminating a freeze early.)

1. Starting the Freeze Process
2. Inspecting Previous Membership Freeze History
3. Setting the Membership Freeze Details
4. Verifying a Freeze Set for a Future Date
5. Terminate a Freeze Early

### Starting the Freeze Process

1. Click **Customers** > **Search**, then enter the member's name. This takes you to their member record.
2. Click the **Freeze** icon in the Relate Bar:



## Inspecting Previous Membership Freeze History

For your convenience, the member's previous membership freeze history (if any) is displayed:

### Membership Freeze ?

General	Contact Info	History	Billing	PT Scheduling
	<b>John Smith</b> Nickname : - Phone: 281-330-8004 Birthday: 4/15/2000 Group : - Insurance Company : -	Bar Code : 61291602773 Source : - Gender : Male Member since: 2/16/2016 Last Visited : - Contract End Date: 3/1/2016	Agreement ID : 21507513 Membership Plan : Single - Reciprocal Membership Category : Reciprocal Number of Members : 1 Is Primary : Yes Billing Type : Recurring	

#### Membership Freeze History

Employee	Start Date	End Date	Reactivation Date	Reason	Note
Ariel Lindahl	2/16/2016	2/16/2016	-	Traveling	On Vacation.

## Setting the Membership Freeze Details

Set the membership freeze details in the space provided:

### Membership Freeze ?

General	Contact Info	History	Billing	PT Scheduling
	<b>John Smith</b> Nickname : - Phone: 281-330-8004 Birthday: 4/15/2000 Group : - Insurance Company : -	Bar Code : 61291602773 Source : - Gender : Male Member since: 2/16/2016 Last Visited : - Contract End Date: 3/1/2016	Agreement ID : 21507513 Membership Plan : Single - Reciprocal Membership Category : Reciprocal Number of Members : 1 Is Primary : Yes Billing Type : Recurring Current Status : <a href="#">OK</a>	

#### Membership Freeze History

Employee	Start Date	End Date	Reactivation Date	Reason	Note
Andrea Hagen	2/16/2016	2/15/2016	2/15/2016	Traveling	On Vacation.

#### Membership Freeze:

Employee:  \*

Start Date:  \*

End Date:  \*

Reason:  \*

Note:

- **Start Date:** May be today's date, or any future date.
- **End Date:** This is optional. If no end date is selected, membership will remain on freeze status until manually changed.
- **Reason:** Select from the drop-down list of choices. This field is required.
- **Note:** This is optional, but very helpful and useful.

## Verifying a Freeze Set for a Future Date

1. Click **Customers > Search**, then enter the member's name. This takes you to their member record.
2. Click on the *History* tab.
3. Select *Status History* from the drop-down list of choices:

4. The status history will display the future-set freeze, highlighted in blue. In the example below, the membership will be frozen between 16-Feb-2016 and 15-Feb-2016 due to the fact that the member will be on vacation.

Membership	Status	Begin Date	End Date	Created Date	CreatedBy	Description	Reason	Cancel
Single - Reciprocal	OK	2/18/2016		2/16/2016	Ariel Lindahl	On Vacation.	Traveling	
Single - Reciprocal	Freeze	2/16/2016	2/15/2016	2/16/2016	Ariel Lindahl	On Vacation.	Traveling	
Single - Reciprocal	OK	2/16/2016	2/17/2016	2/16/2016	Andrea Hagen			

## Terminate a Freeze Early

You may wish to terminate a freeze early for a number of reasons, such as:

- The member has returned sooner than expected.

- You initially entered the freeze with no end date.
- You inadvertently put the wrong member on freeze.

To terminate a freeze early, follow these steps:

1. Click **Customers > Search**, then enter the member's name. This takes you to their member record.
2. Click the **Freeze** icon in the Relate Bar:



3. Click the **Reactivate** button near the bottom-left part of the screen:

Membership Freeze History

Employee	Start Date	End Date	Reactivation Date	Reason	Note
Ariel Lindahl	2/16/2016	2/24/2016	-	Traveling	
Andrea Hagen	2/16/2016	2/15/2016	2/15/2016	Traveling	On Vacation.

Membership Freeze:

**Reactivate** Cancel

4. You will receive a note that the membership was reactivated. Click **OK**.