Purpose:

This document defines the process for correcting an erroneous renewal. This will usually be where a renewal has been made for the wrong person due to a confusion of surnames.

When an erroneous renewal has been detected the information regarding the renewal must be forwarded to the Membership Secretary or the Beacon System Administrator. Both these roles are currently held by John Macfarlane.

The information should include the renewal form for the person who should have been renewed and the information (member's name, address and membership number) of the person who has been renewed in error.

If the erroneous renewal has been detected during or after the process of renewal, then the renewal can be completed for the correct member, leaving the correction to be applied to the member's record who has not renewed.

In this circumstance the same information must be provided: the renewal form of the correct member renewal and the information (member's name, address and member number) of the member who has been erroneously renewed.

The following process will be applied by the Membership Secretary or the Beacon System Administrator. Only these roles will have the privileges to make the appropriate changes.

It will be necessary to edit some or all of these records:

- The ledger for the transaction.
- The membership data for the erroneously renewed member.
- The membership data for the one that should be renewed.

1. Edit the Ledger Record and

- Change the name in the 'From' field to the correct name.
- Change the members using the drop down list to the correct member
- Check that Gift Aid is correct and edit if necessary
- Save the Transaction

This allocates the payment to the correct member.

2. Find membership record for the wrongly renewed member and

- Set the 'Next Renewal' date back to where it should be by clicking in the date sector. Make sure you have the right year.
- Set the membership status (next to the member number) to Lapsed.
- Save the record.

This sets the member back to not having paid and they will appear on the renewal list. To appear on the list they must have passed the renewal date and have a status of 'Lapsed'.

3. Find membership data for member that should have been renewed and

- Set the 'Next Renewal' date to next year by clicking in the date selector. Make sure you have the right year.
- Set the Status to Current
- Save the record

This sets the member to be current and paid up for the year. At the bottom of this page you should now see the payment recorded.

End