



How to guide for:

Managing a Youth Membership Application in Operoo.

# What does this cover

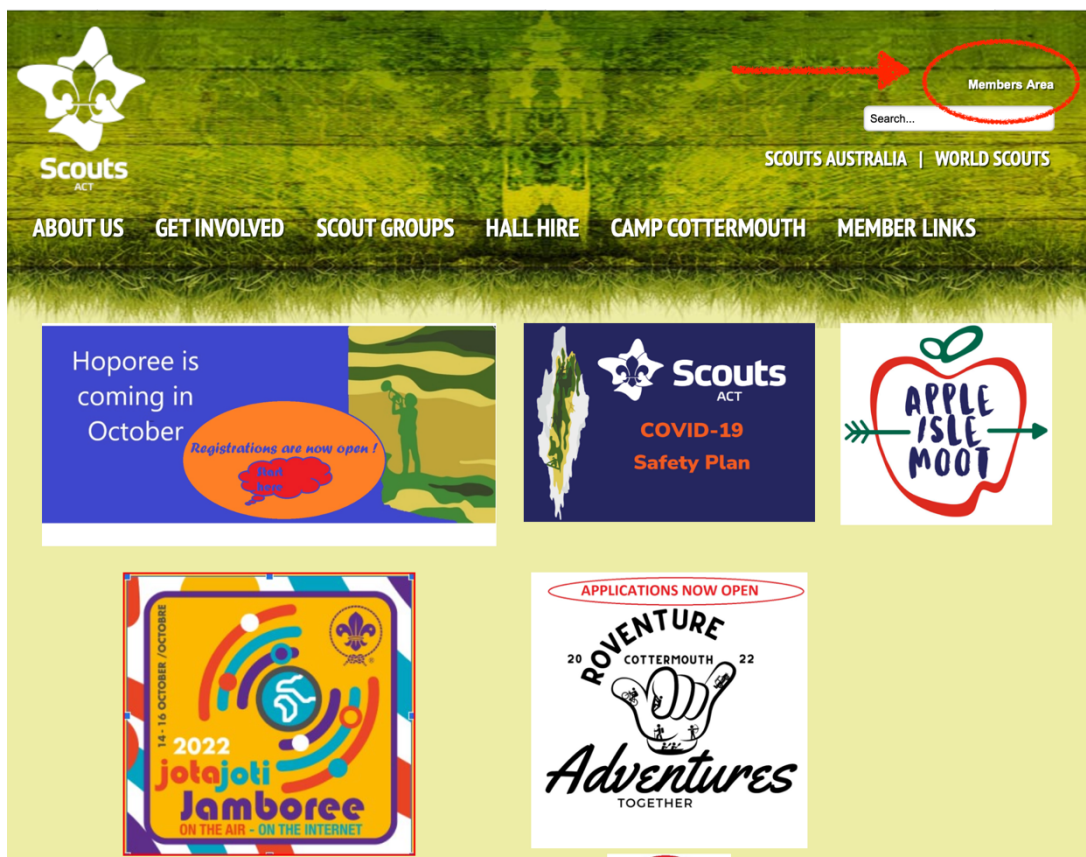
How a Group Leader initiates and processes a Youth Membership Application using Operoo.

## Background Information

- This Operoo form replaces the existing form in the Zoho Portal. The Zoho Portal has now been decommissioned.
- The Youth Application form is a ‘public form’, meaning that anyone with the link can fill in the form.
- Unless we share that link with them, no one can access the form.
- Operoo will allow the parent to download a copy of the form showing their responses.
- Operoo will not generate a PDF of the completed form for the Group Leader.
- Operoo does not currently have the functionality to allow Group Leaders to view their approved forms.
- We have generated an automated email to collect the information in the form that Group Leaders can then use for downstream processes.

## What are the steps

1. Go to the Scouts ACT Website and log-in to the Members’ Area.



2. Go to Forms & Resources, and then to Membership and Activity Forms.

## Forms & Resources

### Membership and Activity Forms

Activity Approval Guide

3. Copy the link at Youth Membership Form and paste it into a new email to the parent/carer.

## Membership and Activity Forms

### Youth Membership

Youth Application for membership

Youth Helper Form

<https://bit.ly/YouthMember>

Youth Helper Form

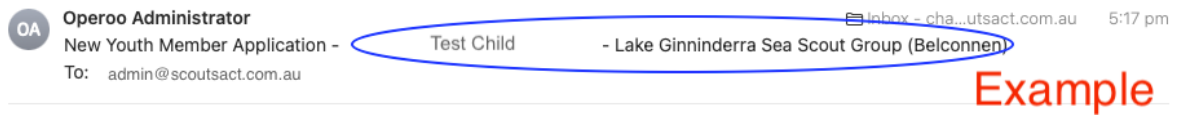
4. In your covering email let the parent/carer know that at the end of the form they must choose YOU as the approver from the list of Group Leaders displayed.

Parents will have the option of downloading a copy of their form when they submit.

5. When the parent has submitted the form, the Group Leader will receive an email with a link to the form.
  - Click the link, which will take you to the Operoo Log-in Screen. Once logged in the form will open immediately
  - If you are already logged in, the form will open immediately
  - Review the form
  - Approve or Reject the Form
  - Add comments if you wish
  - Click Save

NOTE: Public Forms cannot be accessed from your Form Library or elsewhere in Operoo. Branch Office staff with top-level administrator access can see, retrieve and download the form if needed.

6. The Branch Office will receive an email prompting them to forward the Applicant's Information to the Group Leader.



**BRANCH OFFICE - PLEASE FORWARD THIS EMAIL TO THE GROUP LEADER AT:**

Lake Ginninderra Sea Scout Group (Belconnen)

(Group Leader)  
Dear Jackie Stenhouse

Now that you have approved this Youth Member Application for Test Child, the next step is to forward this email to the person in your Group responsible for registering the new member in Extranet. Remember that the family's invitation to create an Operoo profile is automatically triggered overnight by Extranet, so this step is important. Your Treasurer will also need information from this email to generate a fee invoice in Xero.

For data entry purposes, the relevant details are provided below.

**DATA PRIVACY REMINDER:** This email contains private and personal data that must be handled in accordance with the Scouts ACT Privacy Policy. Share this information only with those who require the information to perform their Scouting role.

**PART 1: Information about the YOUTH**

First Name: Test-17\_Jacqueline

Middle Name/s: Ann

Last Name / Surname / Family Name: Stenhouse

Preferred Name: Jackie

Unit (Section): Cubs (8-11 years)

School: Belconnen Primary

School year: 4

Date of birth: 12 Jul 2022

Gender: Female

etc ↓

Blue circles show data that is automatically called in to this email from the Youth Application form

7. Forward this email to the appropriate people in your group for processing:

- Whoever does the Extranet data entry for your Group. Remember, the family's invitation to Operoo is generated automatically overnight by Extranet, so it is essential to add the new Youth Members to Extranet as soon as possible.
- Your Group Treasurer, to send an invoice for Fees.
- Other members of your team as needed.

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