



How to guide for:

Managing an Adult Membership Application with Operoo.

What does this cover

How a Group Leader, Rover Unit Leader or other Team Leader initiates and processes an Adult Membership Application using Operoo.

For brevity in this document, the term Group Leader will be deemed to include Rover Unit Leader and other Team Leader.

Background Information

- The Adult Application form, the Referee Form, the Endorsement, and the IAVP are ‘public forms’, meaning that unless the link is shared with them (in this case, by the Group Leader), no one can access the form.
- Operoo will allow the applicant 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 automated emails to collect the information from the forms that Group Leaders can then use for downstream processes.

Overview

Before an Adult Membership application will be considered by the Appointments Committee all of the forms and information listed below must be received and correct.

All completed forms automatically transmit to the Branch Office. The Group Leader does not need to send any forms to the office. As always, the Branch Office will track and check the accumulation of forms for each applicant, and assist with follow-ups and reminders to the Group Leader, the Referees, and the Applicant, as needed.

These forms are required for adult applications:

1. Adult Membership Application Form
2. Two Referee Reports
3. Endorsement from the Group Committee, Rover Unit or a member of the relevant Team.
4. *For Leaders*: an Individual Adult Volunteer Plan (IAVP) Phase 1
5. Copy of the Working with Vulnerable People Card (WWVP)

Does it matter what order the forms are done?

FIRST: Send the Adult Membership Application form to the applicant. Approve (or reject) the form when the applicant submits it.

SECOND: Await the email that will be forwarded by Branch. With the information in this email, the Group Leader can then initiate the Referee Reports and get Endorsement from a Committee member.

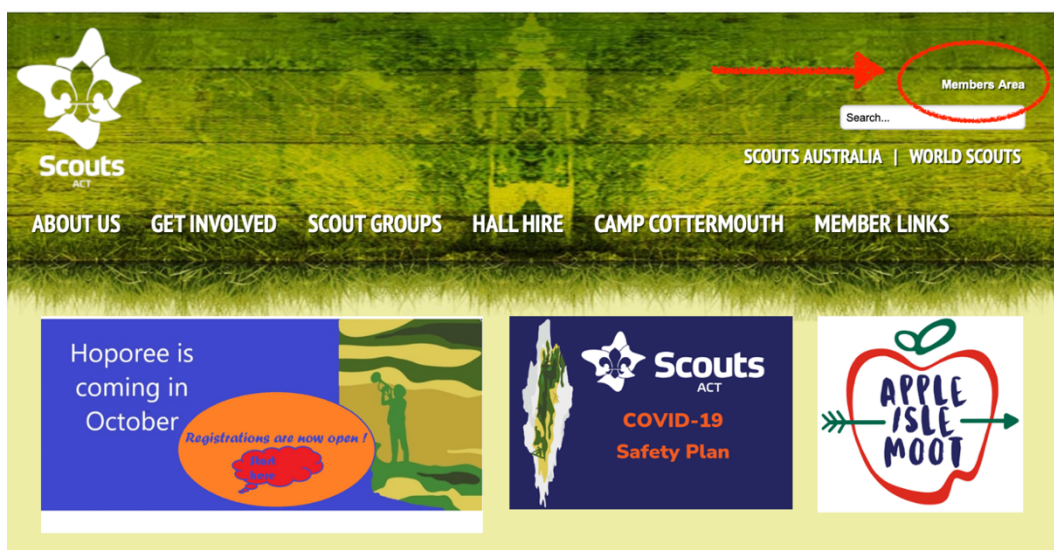
THIRD: (If applicable), at any stage, work with the applicant to complete the IAVP.

NOTE: Branch will follow up with applicants on behalf of Group Leaders at appropriate intervals to get the WWVP.

Branch will follow up with Referees on behalf of Group Leaders if Referee Reports have not been received in about two weeks.

What are the steps

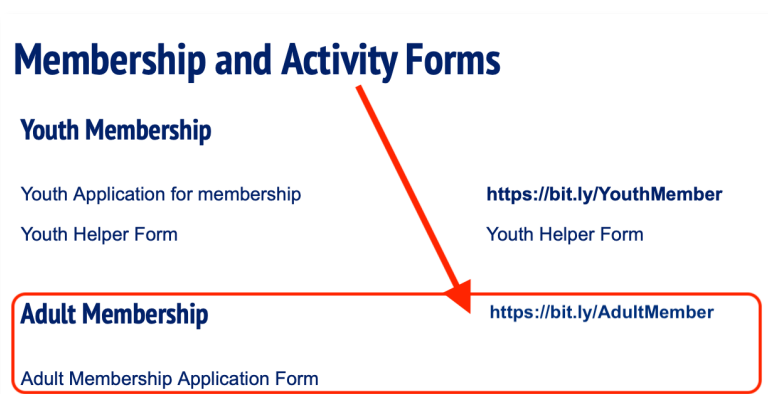
1. Go to the Scouts ACT Website and log-in to the Members' Area



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



3. Copy the link at Adult Membership Form and paste it into a new email to the person applying for adult membership.



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

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

5. When the applicant 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 Operoo. Once logged in the form will open immediately
 - Review the form
 - Approve or Reject the Form
 - Add comments if you wish
 - If you wish to save a copy, PRINT the form NOW before you click save. You can print either to paper/printer or save as a PDF. Once you click save, you cannot get a copy of the form.
 - Click Save

NOTE: Completed 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. Operoo will generate an email prompting the Branch Office Team to forward the applicant's information to the Group Leader.

This email contains:

1. Instructions (next steps) for the Group Leader
2. The applicant's answers from their application form.

7. Forward the email to the someone in your group committee to provide endorsement of the application.

1. The link to the Endorsement Form is embedded in the email – simply forward the whole email to the committee member.

DATA PRIVACY REMINDER: The 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.

8. Contact the referees using the information in the email. Send each Referee a separate new email and paste the link to the Referee form into those new emails.

9. If the applicant is applying to be appointed as a Leader, work with them to complete the IAVP Phase 1. The form is available from the Scouts ACT website (members' area).

OA Operoo Administrator
Mary Madeup - Application for Adult Membership - Next Step
To: admin@scoutsact.com.au

Sample

BRANCH OFFICE, PLEASE FORWARD THIS EMAIL TO THE TEAM LEADER:

Emma Georgiou

Dear Group Leader, Rover Unit Leader or Team Leader

You have approved the application below from **Mary Madeup** for Adult Membership.

This section gives 'next steps' for GL

NEXT STEPS

- Obtain the endorsement of a member of your **Group Support Committee** or **Rover Unit Council** or **Activity Team** (whichever is applicable).
 - Please **forward this email** to the relevant person in your Group Committee or team, and ask them to complete the Adult Membership Application Endorsement [at this link](#)
- Send a suitably worded email to the **Referees** containing the link below (Referee Report) and ask them to complete the form.
https://groups.operoo.com/public_forms/810724/new

Do **not** forward this email to the Referees. Find the Referees' name and contact details in the information provided below.

- The Team Leader and the Branch Office will receive a copy of the Referee Reports. The Team Leader does **not** need to forward the Referee Reports to Branch.
- The Branch Office will follow up the referee/s if no response is received in two weeks.

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: Appointment sought

Scout formation: SCOUT GROUP: Lake Ginninderra Sea Scout Group (Belconnen)

Role: Test

PART 2: About the applicant

First Name: . Mary

This section gives info from the application form needed to complete other steps