

Scouting Ireland

Membership Profiles & Annual Census Document

Managing new & existing profiles and how to submit the Annual Census

Version 1

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Membership Profile & Annual Census Document

Welcome to the Membership Profile Document. Here you will find instructions and information surrounding the various types of membership profiles in Scouting Ireland and how to submit the annual census. This is the first version of this document and it will be reviewed and updated if any changes are made to the Membership Management System (MMS) or new information becomes available. We hope you find this document useful in your Scouting Trail.

Section 1 Creating a Profile

To create a new adult application, a new youth member or transfer an adult member from one role to another you will do this by using the create profile area of the site.

To locate this area you need to;

1. Log on to my.scouts.ie
2. Go to "Manage Profiles"
3. Click the blue button labelled "Create Profile"

Once you are in this area you will see that you will have between 1 and 6 different options. The number of options will depend on your role in your entity.

The 6 options are known as forms and are listed below.

- **Youth Member** - Use this form to create a profile for new Youth members aged 6 to 18
- **Adult Rover Scout (18+)** - Use this form for new Adult members aged 18 to 26 registering as Rover Scouts
- **Adult Rover Scout + Scouter** - Use this form for new Adult members aged 18 to 26 registering as Adult Rover Scout +Scouter
- **Adult Scouter** - Use this form for new Adult members registering as Scouters
- **Associate Member** - Use this form for new Adult members registering as Associate members
- **Transfer to new Member Type** - Use this form to transfer existing Adult members to a new member type. This includes members who have turned 18 automatically listed as "transferring to adult membership"

Creating a new Youth Member

Applicants that are 6 years of age or older and under 18 years of age are registered on the Membership Management System by using the Youth Member option.

The roles with permission to create a new youth member are as follows;

- Member in Charge of Section
- Group Secretary
- Deputy Group Leader
- Group Leader

There are two steps in this process which are entering personal information on page 1 and entering the section information on page 2.

To create a new youth member, follow the instructions below;

1. Log on to my.scouts.ie
2. Go to "Manage Profiles"
3. Click "Create Profile"
4. Select "Youth Member"
5. Enter the required details for the new member
6. Click "Next"
7. Select the section that the new member will be joining
8. Select the new members sub type "beaver, cub, scout, venture etc."
9. Click "Next"
10. The process is now complete and the next of kin email address which has been entered will receive an automatic welcome/account activation email from the membership management system.

Note: The new member's next of kin will be able to log onto the profile and update contact information, book individual activities and apply for the CSA Award if the member is in Scouts or Ventures.

Creating a new Adult Applicant

New applicants that are 18 years of age or older are registered on the Membership Management System by using the adult membership options below.

- **Adult Rover Scout (18+)**
- **Adult Rover Scout + Scouter**
- **Adult Scouter**
- **Associate Member**

The instructions that are listed below will be applicable to the above adult membership options.

The roles with permission to create a new adult applicant are as follows;

- Group Secretary – **Can Create but Cannot Approve**
- Deputy Group Leader – **Can Create and Approve**
- Group Leader – **Can Create and Approve**

Step 1. Sending the invitation. To start the registration process of a new adult applicant, follow the instructions below;

1. Log on to my.scouts.ie
2. Go to "Manage Profiles"
3. Click "Create Profile"
4. Select the desired membership option for the new applicant
5. Enter the required details for the new member
6. Click "Send Invitation"
7. The member will now receive an email so they can enter the required information.

Completing this profile involves three further steps which are outlined below.

Step 2. Personal Information (User) – This step requires the new applicant to fill out their personal information, enter referees/additional information.

Step 3. Application Approval – This is the step where the Group Leader reviews the information, checks the referees and decides if the group wish to proceed with the application. When this step is complete the member will receive the relevant vetting form by email.

Step 4. National Office Approval and Vetting – This is the step where the member needs to complete the relevant vetting process. When this step is completed both the group and the new applicant will be notified by email.

Note: Refer to the flow charts on pages 12 – 14 of this document for a visual lay out of the adult application and vetting process.

Existing Members who are over 18 years old.

The option “Transfer to new member type” is used in two different scenarios;

1. To register an existing member who has turned 18, as one of the adult membership options.
2. When an existing adult member wishes to change to a different adult membership option.

The instructions that are listed below will be applicable to both of the above scenarios.

The roles with permission to a “transfer to new member type” application are as follows;

- Group Secretary – **Can Create but Cannot Approve**
- Deputy Group Leader – **Can Create and Approve**
- Group Leader – **Can Create and Approve**

Step 1. Sending the invitation. To start the registration process of the “transfer to new member type” option, follow the instructions below;

1. Log on to my.scouts.ie
2. Go to “Manage Profiles”
3. Click “Create Profile”
4. Select “transfer to new member type”
5. Start typing the member’s name
6. Select the member when their name appears in the list
7. Select the desired member subtype from the dropdown list
8. Click “Send Invitation”
9. The member will now receive an email so they can enter the required information.

Note: You may need to enter an email address for the applicant if there is no address recorded on their profile.

Completing this profile involves three further steps which are outlined below.

Step 2. Personal Information (User) – This step requires the new applicant to fill out their personal information, enter referees/additional information.

Step 3. Application Approval – This is the step where the Group Leader reviews the information, checks the referees and decides if the group wish to proceed with the application. When this step is complete the member will receive the relevant vetting form by email.

Step 4. National Office Approval and Vetting – This is step where the member needs to complete the relevant vetting process. When this step is completed both the group and the new applicant will be notified by email.

Note: If the member was already correctly registered as an adult member then they will not be required to enter new referees.

Note: Refer to the flow charts on pages 12 – 14 of this document for a visual lay out of the adult application and vetting process.

Transferring Members between sections

The following roles can submit to transfer members from one section to another.

Member in Charge of the Section – Has access to the section they are in charge of.

Group Secretary – Access to all sections.

Deputy Group Leader – Access to all sections and can approve changes.

Group Leader – Access to all sections and can approve changes.

To transfer a member(s) from one section to another follow the steps below.

1. Log on to my.scouts.ie
2. Go to “manage group”
3. Click “view sections” for the section you want to adjust. (The section(s) in the group will then appear below)
4. Click "edit" on the section you want to add or remove members from.
5. Click “add” or “remove” on the member(s) as per your requirements. (Tip: It is also possible to search for a name by using the search box)
6. Click “Save Changes” when you are done.
7. When “Save Changes” is clicked, the Group Leader will receive a notification to approve each change.
8. When the GL approves the transfer, the change will take effect.

Removing Members

When a member has left Scouting Ireland you will need to remove their record from the Scouting Ireland Membership Management System.

The following roles have access to remove members.

- **Group Secretary**
- **Deputy Group Leader**
- **Group Leader**

Below are instructions on how to remove members from the group.

1. Log on to my.scouts.ie
2. Click "Manage Group"
3. Click "Group Profile"
4. Click the button labelled "Edit Members"
5. Untick the names on the members you wish to remove.
6. Click "Save Changes"
7. Once "Save Changes" is clicked the change(s) will take effect.

The Annual Census

The Scouting Ireland Census can be created **from the 1st of January** each year.

The following roles have access to the Census Tab and can update or save the Census information.

- Group Leader
- Deputy Group Leader
- Group Secretary
- Group Treasurer

Only the Group Leader can submit the census to Scouting Ireland.

Below are the instructions on how to submit and make payment for the Census;

1. Log on to my.scouts.ie
2. Click "Manage Group"
3. Click the tab labelled "Census"
4. Click the button labelled "Create 2019 Census"
5. Click "Update"
6. Check that the figure of adult members and the figure of youth members are correct.
7. When you are satisfied that this is correct click "save" and then click "submit"
8. Click "Print Statement" and you will have the information on how to make payment.

Census FAQ

If you are under the impression that numbers in the census are not correct and you cannot identify the problem, please check the FAQ below.

Section numbers not matching

In some cases, the statement numbers may not match the figures that are in your section. Please note **this does not necessarily** affect the numbers of youth members in the calculation on the census page at the total number may still be correct.

This inaccuracy may be due to the following reasons:

- The member has been removed from the section but not the group.
- The member has not been added to their new section on the Database.
- The group leader not approving the transferral for members from one section to another.

To resolve this issue

1. Group Leader selects "Manage Reports" to run the "Member Contact Report".
2. Filter by the group and then by the subtype (i.e., beaver, cub, scout, venture, rover etc) wherever the number does not match and run the report.
3. You will then get a list of members in the group with that Subtype (not just those in the section)

4. Compare this with your section list to spot the members not in the section.
5. You can then move the members to another section or remove them from the group if they have left.
6. Repeat this process for any other subtypes where the numbers do not match.

Pending Members are showing as €0

There is no requirement to pay for pending members as they are not registered members of Scouting Ireland.

How do I make a Census Payment?

Payment for the census is by cheque or EFT only. Payment instructions can be found when you click "Print Statement"

Who can create and adjust the census?

The Group Leader, Deputy Group Leader, Group Secretary and Treasurer have access to the Census tab.

Who can submit the census?

Only the Group Leader will be able to submit the census.

Who can update the membership records and create new adult members?

The Group Leader, Deputy Group Leader and the Group Secretary can update and create adult members records.

Who can update the membership records and create new youth members?

The Group Leader, Deputy Group Leader, Group Secretary and member in charge of the section can update and create new youth member profiles.

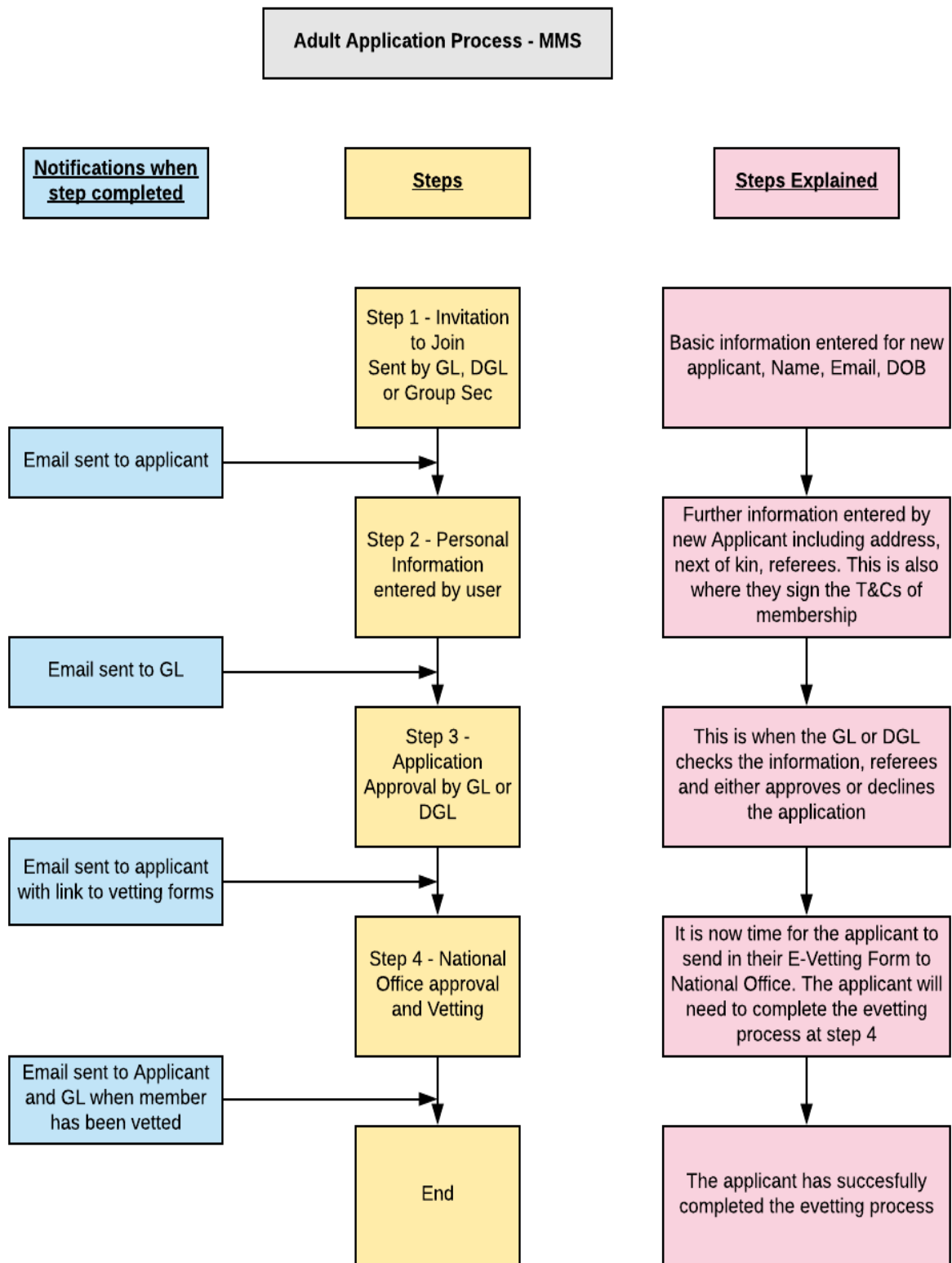
Where do I get the census payment receipt?

1. Go to Manage Group
2. Payments
3. Payment History
4. You will then see a record of your payment with a button labelled print receipt.

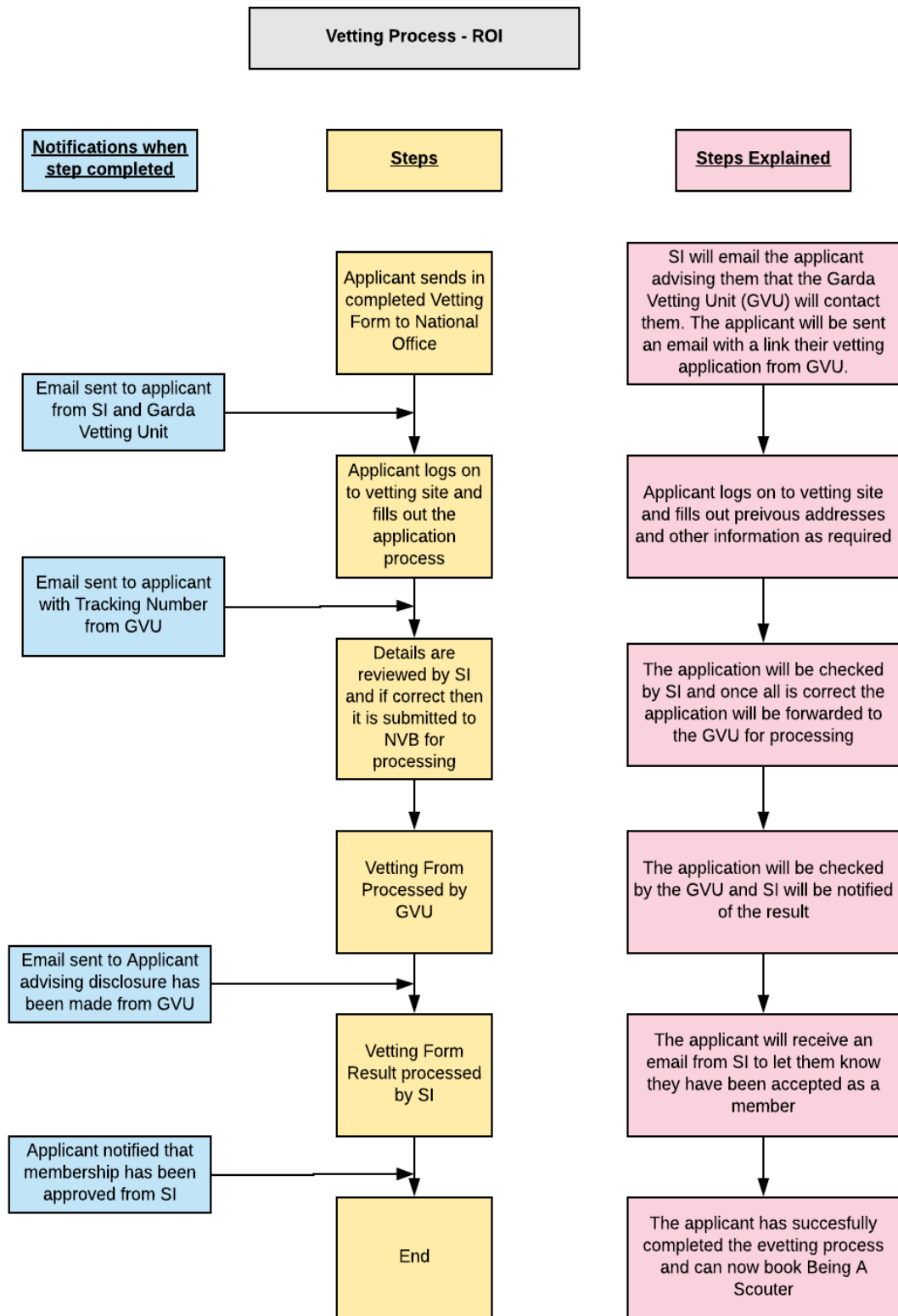
Further Points

- An Adult Application Invitation will be active for 30 days. After 30 days it will not be possible to submit the application.
- A Vetting Application will be active for 30 days. After 30 days it will not be possible to submit the application.
- Submitting a vetting form without the previous application steps being completed will result in the form being returned.
- It is the responsibility of the group and the individual to ensure the personal record details are correct on the Membership Management System and relevant Vetting forms.

Adult Application Process Chart



Vetting Chart - ROI



Access NI Chart

