



Surf Life Saving Australia – Circular

Title:	End of Season IT activities for Clubs, Support Operations and Branches
Document ID:	Circular 62\2015-2016
Audience:	SLS State/Territory Centres SLS Branches/Districts SLS Clubs and Support Operations services ALS Lifeguard Managers
From:	Surf Life Saving Australia – Information Technology
Date:	01/04/2016
Subject:	Membership Management End of Season Reporting (Patrol Service, Awards for Season, etc.) Members Portal – Accounts, Recognition Awards, Library & Administrative Functions Payment Gateway
Summary:	This circular is designed to assist Club, Lifeguard, Support Operations Admin and Surfguard Administrators to ensure that membership and related data is current and ready for the close of the season. We have also included some pre-season IT activities that you may also wish to perform that are performed in conjunction with the end of this season.

All clubs need to follow their State’s Standard Operating Procedures when performing ‘end of season’ activities. It is highly recommended that clubs work through the following check box list to ensure completeness once State processes have been followed.

End of Season IT Activities

END OF SEASON CHECK-LIST		ACTIVITY DESCRIPTION	TASK COMPLETED
1	Memberships		
1.1	Active Members	Check active members have fulfilled obligations	
1.2	Archiving Members	Archive members who have not fulfilled obligations	
1.3	Pending Member Requests	Process outstanding Pending Member Requests	
1.4	Membership Categories	Check members membership categories	
1.5	Transfers	Process outstanding transfers and then archive	
2	Organisational Management		
2.1	Gear & Equipment	Add/update equipment held by the club	
2.2	Organisational Details	Ensure your organisations details reflect current information and contacts	
2.3	Bank Account Details	Ensure bank details are up to date	
3	Assessments		
3.1	Assessment Request Lists	Process/submit outstanding Assessments	
3.2	Processing Awards	Portal processing of awards	
4	Patrols		
4.1	Patrol Logs	All relevant patrol data has been entered	
4.2	Incident Report	All Incident Reports have been entered into the IRD system	
5	End of Season Reporting		

1. Memberships

The recommended method to ensure that your membership list is accurate is to go through your list of 'Active' members and ensure that only those members who have fulfilled your clubs membership obligations remain as Active 2015-2016 registered members.

Support Operations and Lifeguards administrators should perform this function so accurate records of this season's participants are maintained, and those who did not participate are archived.

1.1 Active Members

Active Membership generally means members who have:

- Completed the SLSA membership form (either online or in paper format).
- Paid your club annual fee.
- Fulfilled all of your club/state membership requirements, ie. forms, patrols, etc.

These members should be reflected in Surfguard as registered 2015/16 with an 'Active' Status.

Member ID	Surname	First Name	DOB	Organisation	Registered Season	Status	Membership Category	Competitor	Contact Number	User Options
5593114	Cup	Big	01/07/1999	Test NSW Club	2015 - 2016	Active	Active (15-18 yrs)	Yes		View Edit Awards Transaction Notes Documents
5601194	Cup	Coffee	06/05/1966	Test NSW Club	2015 - 2016	Active	Award Member	Yes		View Edit Transaction Notes Documents
5603309	Cup	Tea	30/01/1962	Test NSW Club	2015 - 2016	Active	Active (18yrs and over)	Yes		View Edit Awards Transaction Notes Documents

Criteria: Surname begins with cup; Competitor = All; Status = Active, Archived.

Diagram 1 – example of member with active status and registered for 2015-2016 season

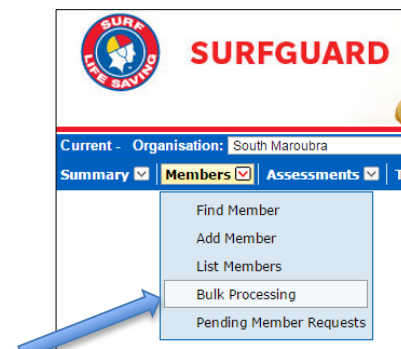
The following report can be run to check if Members have or have not fulfilled their patrol obligations at your club:-

- Reports > General Reports > Patrol Reports
- Report Type: Total Member Patrol Hours
- Output Format: CSV Style
- Click: Advanced Search
- Status: Active
- Registered Season: 2015
- Patrol Hours Specifically For Organisation: tick if you wish to only include hours for your club.
- Season Type: Patrol Season
- Total Hours: Select from the drop down menu and put the number of hours. Eg Less Than 10
- Display the Report

1.2 Archiving Members

Archiving members is used to filter out those who are no longer members. Generally, people who should be archived include:

- Those who did not perform your club's patrol obligations.
- Those who were not financial for the current season (did not pay required membership fees).
- Those who have resigned or are no longer participating in the club.
- Any person who has a Registered year prior to 2015-2016



Do Not Archive all of your Members at the end of the season, only archive Members who fit the above criteria. The Bulk Processing function can be used to Archive Members (see screenshot) Select Process Type: Archive > Click "Search" and moved member who need to be Archived from the "Available Members to the "Selected Members" > Click "Process".



1.3 Pending Member Requests

All members who join/ renew, update their details or create a family group via the Members Portal need their request processed by the club before any updates are shown in Surfguard. These requests are sent as a 'Pending Member Request' and will appear in Surfguard on both the home page and also under the 'Members' tab > 'Pending Member Requests'. All outstanding Pending Member Requests relating to season 2015-2016 should be processed by the end of the season.

Note: Any member can use the Members Portal so even if your club or organisation does not use electronic membership renewals or allow members to update their personal details electronically, there may still be pending member requests sitting on the system that require your attention.

For more information and user guides on using the Members Portal and Pending Member Requests, please refer to <https://help.sls.com.au/>

1.4 Membership Categories

Check your membership lists to ensure that your members are in the correct category. For example:

- Probationary members who have completed their Award/s should be moved into the appropriate membership category. E.g. Active 15-18; Active 18+, Award Member
- Junior Activity Members who have completed their SRC and patrolled (as a general suggestion) should be moved to 'Cadet'.
- Those who have turned 18 years old and patrolled should be moved to Active 18 years and over.

1.5 Transfers

In Surfguard, ensure all transfers have been processed and there are no outstanding transfer requests. Contact the losing/winning club first then if transfers still require attention, contact the Branch/State. Transfers can be accessed via the 'Transfers' tab > 'Transfers'.

2. Organisational Management

The following functions can be accessed in Surfguard, via the 'Organisational Management' tab.

2.1 Gear and Equipment

Ensure all Gear and Equipment has been entered correctly in Surfguard taking into account any new equipment purchased or decommissioned during the season. Gear and Equipment lists can also be used for financial statements/asset lists as part of closing off your financials for the season.

2.2 Organisational Details

Check your Organisational Details are accurate and up to date.

Details such as Display name, Contact Details, ABN, logos and other club information now gets displayed directly from Surfguard to sites such as: SLSA website, Beachsafe, Surfcom, Payment Gateway, etc. and is used by each level of the organisation plus the general public to contact you, so it is important that it remains accurate and up to date.

2.3 Bank Account Details

To view or edit the bank account details stored in Surfguard for a club, click organisational management > Organisational Details > Bank account details. This information needs to be up to date as the bank account details are used for Direct Deposit information if the club uses this optional method of payment

3. Assessments

3.1 Assessment Request List in Surfguard

Check your "Assessment Request List" to ensure there are no outstanding assessments waiting for processing and that assessments are submitted, updated or deleted (by clubs). Contact your Branch or State centre for any assessment processing problems.

3.2 Processing Member Service Awards in the Members Portal

Members or the appropriate club Officer can apply via the Members Portal, for various SLSA Service awards. E.g. Long Service award, Coaching Service Certificate, National Patrol Service Award etc. Members or Club Officers need to log into the Members Portal (portal.sls.com.au), select the 'My Forms' tab to apply and submit award application. Once the form has been submitted by the member or the club officer, it then needs to be approved by the club. In the Portal, the club officer should go to 'My Tasks' and select 'Forms' to approve any outstanding award applications. If the club administrator can't see the 'My Tasks' menu tab, please refer to 'Administrative Access to SLS IT Systems' on page 8.



4. Patrols

4.1 Patrol Logs

All relevant patrol attendance and activity (first aid, rescues etc.) data should be entered as soon as practicable after the last patrolling date.

4.2 Incident Reporting Database (IRD)

All Incident Reports should be entered into the Incident Reporting Database (IRD) or updated if already added via SurfCom. Use the "Browse Incidents" menu item to view your recent incident reports, if an incident has been added via SurfCom it will be available to edit using the "Edit" link.

5. End of Season Reporting (Top Patrol Members, Seasonal Awards, Membership Totals etc)

Surfguard provides summaries useful for end of season reporting and season awards.

Click the **Summary** tab and use the Drop Down menu to select the type of Display you require. Some of the Display options are listed below:-

DISPLAY	DESCRIPTION
Awards – Originating FROM Your Club	Tick "Breakdown by Month" to show Awards for each month of the season.
Patrol Hours – Organisations	Tick "Breakdown by Month" to show the total monthly Patrol Hours provided by your club
Patrol Hours – Top Members	Top 10 Male and Female members based on service hours
Membership Categories	Statistics for Total Members, M/F, Categories, Retention Rates, etc.
Patrol Stats	Generates a Report that can be broken down as Patrol Stats or Unpatrolled Stats. Report details the number of rescues by time and type of rescue (e.g. no gear, tube, board...), total attendance at sign on, mid-patrol, and sign off, number and type of First Aid incidents reported, and the number of Preventative actions

Pre-Season IT Activities to consider

PRE-SEASON CHECK-LIST		ACTIVITY DESCRIPTION	TASK COMPLETED
6	Renewing Memberships		
6.1	Online Membership Renewal	Online Renewal of Existing Membership	
6.2	Emailing Membership Form	Prefilled form can be emailed to all Members	
6.3	Printing/ Mailing Membership Form	Process for Printing Membership form & creating labels	
6.4	Templates	Create, Edit, View & Delete Template Cover Letters	
7	New Members Application Process		
8	Payment of Memberships		
8.1	The Payment Gateway	Process to set your club up to use the Payment Gateway	
8.2	Payment Gateway Price Lists	Update & Upload your Price List	
8.3	Direct Deposits	Another form of payment clubs can offer	
9	Members Portal		
9.1	Communicating with your Members	Advertising Events, Announcements and News	
9.2	Portal Library	Using the Portal Library for your Club Documents	
10	Admin Access to SLS IT Systems		
10.1	Surfguard Access	Process for Surfguard User Accounts	
10.2	Surfguard User Account Report	Check who has Surfguard access at your club	
10.3	Members Portal Admin Functions	Process to assign Admin Functions to Portal Account	



6. Renewing Memberships

Prior to Club AGM's most clubs distribute instructions to existing members on the upcoming season membership renewal process. Outlined below are 3 methods clubs distribute *membership renewal forms*

6.1 Online RENEWAL of existing Membership

Existing Members can renew via the Members Portal at <http://portal.sls.com.au>. Members can create a Members Portal account and once logged in click the Lifesaving Online tab. The Lifesaving Online functions within the Members Portal enable members to:-

- Renew their membership
- Pay their clubs membership fees
- View their patrol rosters, past patrol hours and awards
- Update Personal Details
- Create a Family Group - see note below.
- Access eLearning
- Request substitution for a patrol

NOTE: If a member wants to renew an entire family, the Primary member can create a Members Portal account, create a Family Group in Lifesaving Online within the Portal and renew all members of the family in one transaction. This eliminates the need for every member to have their own portal account.

When sending out your renewal notifications ensure you inform members of the process they need to follow to renew online. For more information about Lifesaving Online and the Members Portal, go to <https://help.sls.com.au/>.

6.2 Emailing Members a prefilled Membership Form

The first step is to amend the 'Cover Letter' Template to ensure it has all information your members need to renew their membership e.g preferred renewal method; club contact details; club fees, etc. See Templates section below in 5.4

- Go to 'Reports' > 'General Reports' > 'Member Reports'
- Click 'Advanced Search'
- Report Type = 'Membership Renewal Form'
- Output Format = PDF
- Renewal Season = 2016/2017
- Status = 'Active'
- Registered Season = 2015
- Tick the 'Email to members' Box
- Tick the 'Declaration' box (see diagram below)

Email to Members:	<input checked="" type="checkbox"/> Will email to members with an email address and 'Do Not Send SMS/Email Communications' unselected. For others, a pdf will be generated.
	Declaration:
	<input checked="" type="checkbox"/> I will only send emails/messages to people who have consented to receive them and I am complying with all SLSA policies and with all relevant legislation.
	Template Name: <input type="text" value="Test"/>

- Print Cover Letter: 'Yes'
- Print Declaration: 'Yes'
- Print Membership Details: 'No'
- Tick the Display Report Here Box
- Display report

Surfguard will then produce a report of members that have been emailed their pre-filled membership form and provide you with pre-filled forms for those without email addresses.

If required, the blank SLSA membership form can be found on the Members Portal (search "F076" OR "Membership Form")



6.3 Printing & Posting to Members a Prefilled SLSA Membership Renewal Form

- Go to the 'Reports' tab > Select 'General Reports' > 'Member Reports'
- Report Type = 'Membership Renewal Form'
- Output Format = PDF
- Renewal Season = 2016/17
- Registered Season = 2015
- Display Report

Important Note: If printing forms for all your members, it is highly recommended to break the output up into a number of smaller groups, as this reports can be large and you may experience time-out issues. To do this simply narrow your selection by either membership category or with member last names starting 'a-c' then another output of members from 'd-f'. These are only a few examples.

Printing Mailing Labels

- Go to 'Reports' > 'General Reports' > 'Member Reports'
- Report Type = 'Mailing Labels – Members'
- Output Format = Avery (J8160/L7160)
- Registered Season = 2015

Select 'advanced search' if you wish to refine your label selection criteria or to select 'Unique Addresses' to produce one label per family.

6.4 Creating & Updating Templates for Membership Details and Membership Renewal Forms

Clubs have the ability to create Template Cover Letters for Membership Details and/or Membership Renewal Forms that can be emailed to members with their prefilled membership information. To access the templates in Surfguard to go Maintenance > Templates. You will have the option to create, edit, view or delete templates.

Templates View @ Test NSW Club			
Template Type	Template Name	Default	Actions
Membership Details	Club Membership Details	No	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="View"/> <input type="button" value="Set Default"/>
Membership Renewal Form	Nipper Membership Renewal Form	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="View"/> <input type="button" value="Set Default"/>
Membership Renewal Form	Club Membership Renewals	No	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="View"/> <input type="button" value="Set Default"/>

7. New Members

New members to the Organisation or members who have not been active for at least 2 years will need to be directed to <http://sls.com.au/join>. They will be able to join (or rejoin a Club or Academy). Once the member completes and submits the online application a confirmation window will display that includes the new member's unique tracking ID. The new member will also be sent a confirmation email that includes a link they can use to check the progress of their application. The new or rejoining member's application request will display in "Pending Memberships" in Surfguard.

Once the pending member request has been submitted to the club, there is also a link that gives the ability for a new member to create a family group. This request will also be sent to the club for approval.

For more information about how to Join or Rejoin a club go to <https://help.sls.com.au/>.



8. Payment of Memberships

8.1 Payment Gateway

The Payment Gateway is integrated within Lifesaving Online enabling members to make online payments, such as membership payments.

If your club has not yet signed up for the Payment Gateway, please contact the SLSA Helpdesk (ithelp@slsa.asn.au) for more information, or obtain a Form 75 from the Members Portal Library. A form 75 is required for any new Payment Gateway account, or any account that requires amendments.

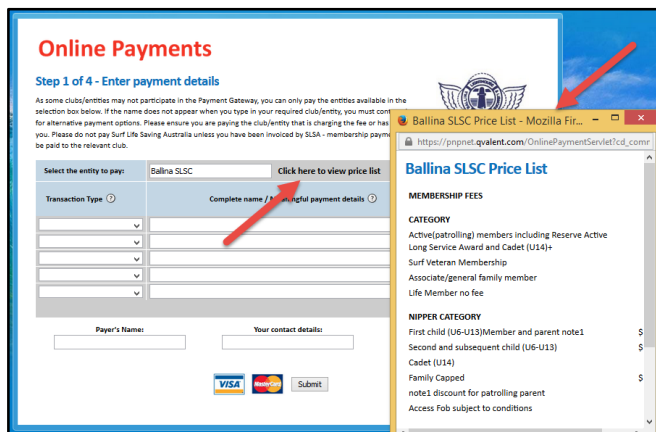
8.2 Updating Payment Gateway Price Lists

All entities using the Payment Gateway can upload their own Price List. This is helpful, as members can view the Price List by clicking on “Click here to view Price List” next to the entity name.

8.3 Direct Deposits

Direct Deposits are another form of payment a club can offer.

This is activated in SurfGuard by ticking the ‘Allow Direct Deposits’ box within Organisational Management > Organisational Details > Bank Account Details > Edit.



Members will be able to access the Bank Account Details in the Members Portal > Lifesaving Online > Membership.

Test NSW Club				Renew	Change Category
Branch:	Test NSW Branch	Competition Rights:	No		
State:	Surf Life Saving NSW	Competition Age Category:	Masters 45-49		
Registered Season:	2015	Child Protection Completed:	Yes		
Membership Category:	Active (18yrs and over)	Online Payments:	(Direct Deposit Information)		

For further information on Payment Options please go to <https://help.sls.com.au/>

9. Members Portal

The Members Portal is a nationally administered resource for Members of Surf Life Saving Clubs and affiliated entities. The Portal is a one-stop shop for member information and files, sourced from across all of the organisation’s Clubs, Branches, States and National groups.

The Members Portal allows Members, Clubs, Branches, State and National Levels of the organisation to post information relating to News, Announcements, Events and Jobs. Any Member who has a Members Portal account can create articles (“content”) for the noticeboard. Club Officer/ Administrators who have been assigned Content Approval functions need to check regularly if there are any items waiting approval. In the Members Portal go to My Tasks > Content Approval.

9.1 Communicating with your Members via the Portal

The Portal Home Page / Noticeboard could be used to advise information to your members (only) for activities such as:

- Your Annual Meeting and Agenda of the meeting
- Any Club Social, and formal events
- Jobs, Announcements and other information

9.2 Using the Portal Library for Club Documents

The Portal Library could be used to provide information to your club members. Examples of documents you could upload:-

- Club Constitution, By-Laws, Rules and Regulations.
- Non confidential minutes and information
- Your patrol handbook, Service agreement SOP’s and other formal documents
- Annual Reports & Newsletters.



10. Administrative Functions for SLS IT Systems

10.1 Surfguard Access

Only Club officers and administrators need access to the SLSA National Database, Surfguard. This access can be requested by a Form 49. Below is a screenshot of the permission levels that will need to be specified by the club.

Please select one New Account <input type="radio"/> Amend Account <input type="radio"/> Reactivate Account <input type="radio"/> Deactivate Account <input type="radio"/>		
First Name:	Last Name:	
Officer Position:	Phone: (mobile preferred)	
Email:		
Start Date of Access:	End Date:	No End Date (tick) <input type="checkbox"/>
Surfguard – Please select ONE of the 3 permission levels below		
1. Full Access – Create/Edit/View <input type="checkbox"/>		
2. Full Access – View Only <input type="checkbox"/>		
3. Custom Access - Tick 1 or more of the following:-		
Members <input type="checkbox"/>	Assessments <input type="checkbox"/>	Patrols <input type="checkbox"/> Organisational Management <input type="checkbox"/> Email/SMS <input type="checkbox"/> IRD (Incident Reports) <input type="checkbox"/>
Please provide additional information if required:-		

10.2 Surfguard “User Account” Report

Clubs can run a report to find out who has an “Active” Surfguard user account as follows:-

- Reports > General Reports > Organisational Management Reports
- Report Type; Users
- Output Format; CSV Style
- User Status; Active
- Display Report

10.3 Administrative Functions in the Members Portal

Clubs need to appoint a number of club officers with the appropriate administrative functions within the Members Portal to approve Content and/or Forms. A Form 49 requesting access to Administrative functions will need to be completed and sent to ithelp@slsa.asn.au for processing. If the club officer/ administrator is in Surfguard, as a member, please create a portal account BEFORE sending the Form 49 to the IT Helpdesk. See below Administrative Functions that can be assigned.

Members Portal Administrative Functions	
Are you a member of an SLSA organisation?	
YES – Please go to https://portal.sls.com.au , create a portal account, and provide username: <input type="text"/>	
NO – Please provide the following: Gender: Male <input type="radio"/> Female <input type="radio"/> Date of Birth: <input type="text"/>	
Please select the Administrative functions required:-	
1. Content Approver – Ability to approve content displayed in the portal for your organisation/s	<input type="checkbox"/>
2. Forms & Workflow Approver – Long Service awards/certificates	<input type="checkbox"/>
3. Reporting – Ability to run reports for your level of organisation/s	<input type="checkbox"/>
4. Comms Management – Ability to Email/SMS Members	<input type="checkbox"/>
5. Person Management – View Members Memberships, Contact Info & Portal Admin Functions	<input type="checkbox"/>
6. Library Maintenance – Ability to create sub-folders in Branch/Club Library	<input type="checkbox"/>

Support Contact Details and Hours

Support Hours: Mon-Fri 0800-1800hrs, Sat & Sun 0900-1300hrs

Ticket: <http://support.sls.com.au>

Email: ithelp@slsa.asn.au

Phone: 1300 724 006