

# myscouts.ca

Release 1.0

User Training Release 1.0 February 2012

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# myscouts.ca

# Module 1 Introduction and Overview

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# Welcome to myscouts.ca.

This training is intended to support Registrars, Commissioners, Treasurers, Executive Directors (and other volunteers and employees) in the performance of tasks related to the registration process and to the maintenance of member and organization records, including:

- Establish access to myscouts.ca and log in
- View your member profile
- Request a new password and update password and language
- Search the system to find an organization or an Individual
- View the Volunteer Employee Directory



- View/edit organization details
- View/edit meeting details
- Setup online registrations and payments
- Set fees
- Prepare for registration events
  - Print registration-related reports
  - View member status
- Renew returning members
- Transfer members
- Renew your membership and renew family memberships



- Register new members
- Create an account and self register
- Update member role records
- Update a member profile
- Screen volunteers
- Process Registration Financial Transactions
  - Enter subsidies/discounts and close a batch
  - Reconcile registration fees
- View/add training and recognition records
- View registration history



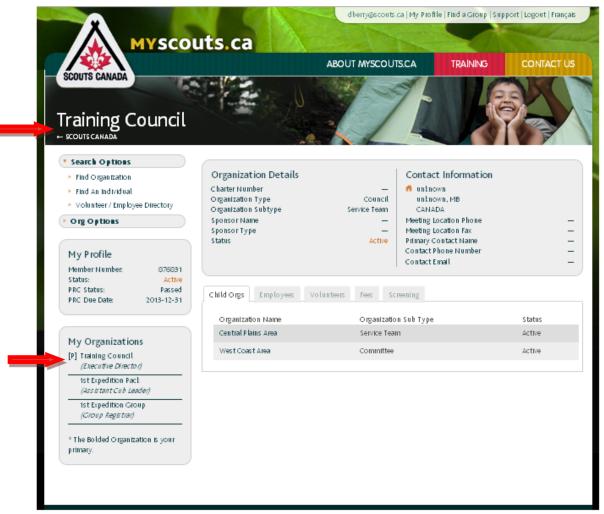


- Screen Anatomy
- Scouts Canada Organization Hierarchy
- Terminology
- Notes





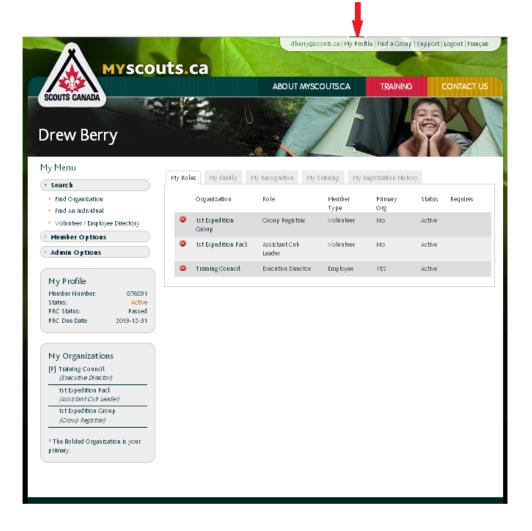
### Employee/volunteer:







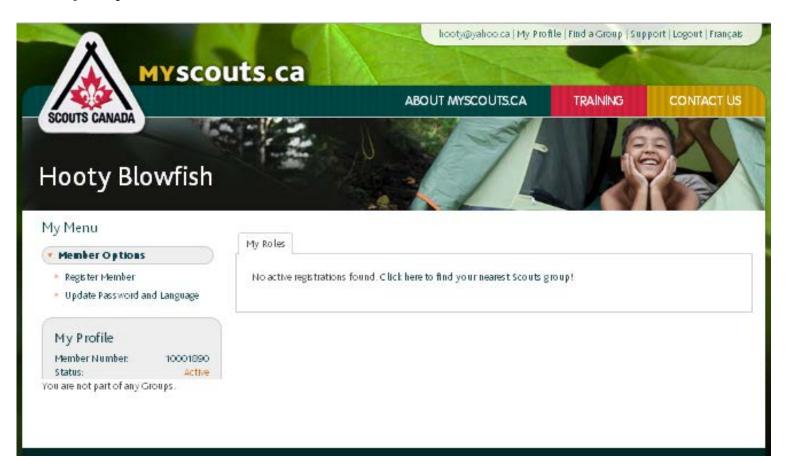
### Employee/volunteer – Member Profile:







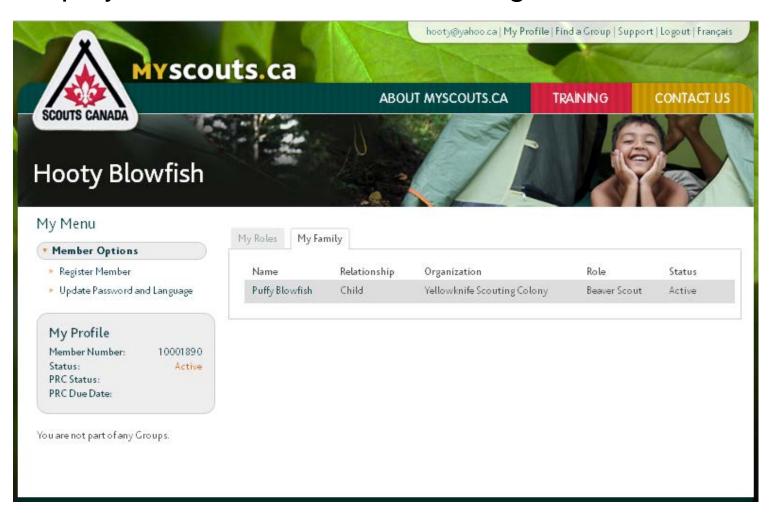
# Non-employee/volunteer:







### Non-employee/volunteer with child/charge:







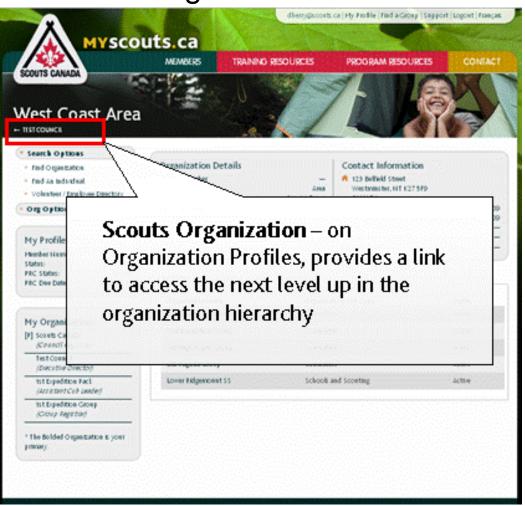
### **Profile Name:**







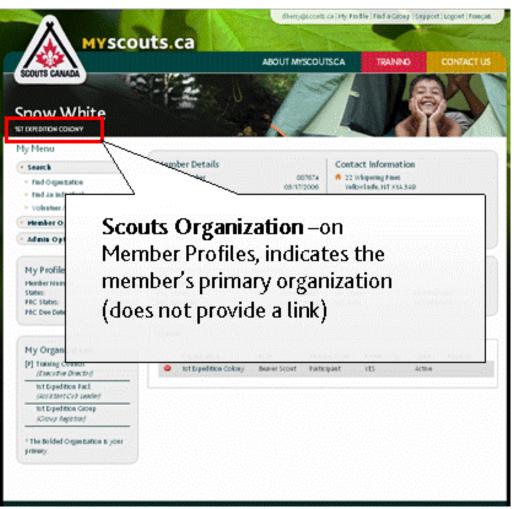
### Scouts Organization – Organization Profile:







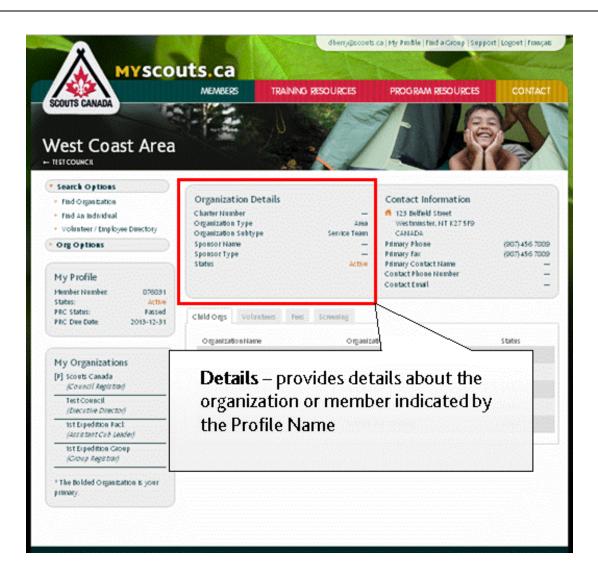
## Scouts Organization – Member Profile:







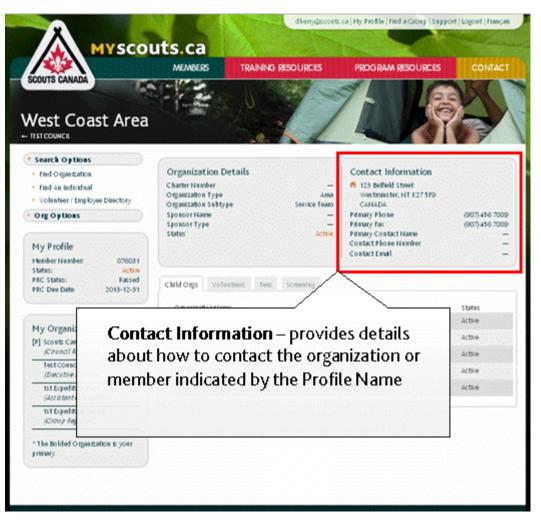
### **Details:**







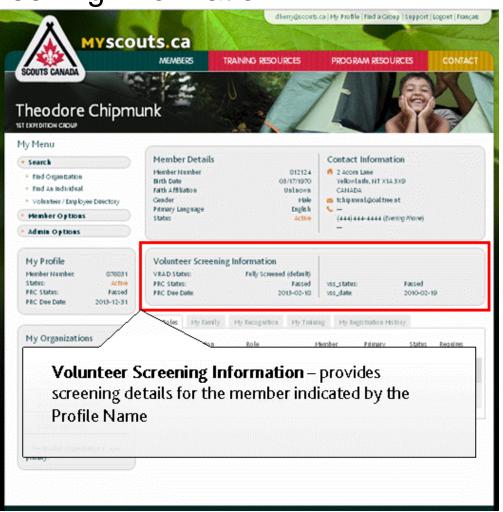
### **Contact Information:**







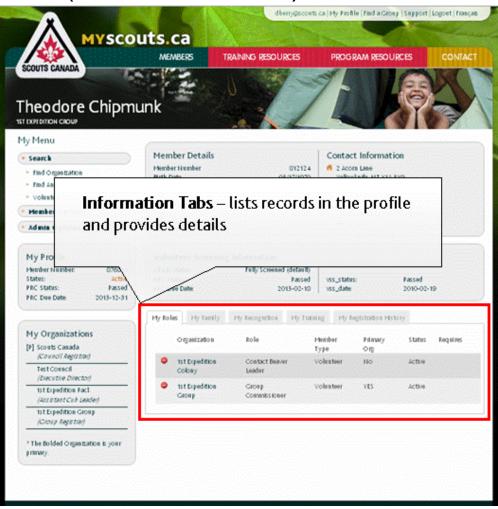
### Volunteer Screening Information:







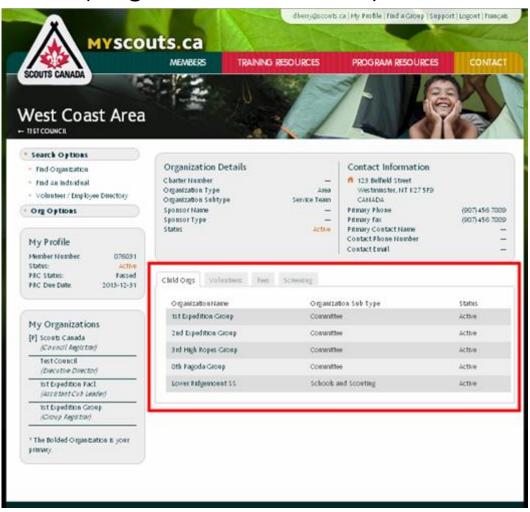
## Information Tabs (Member Profile):







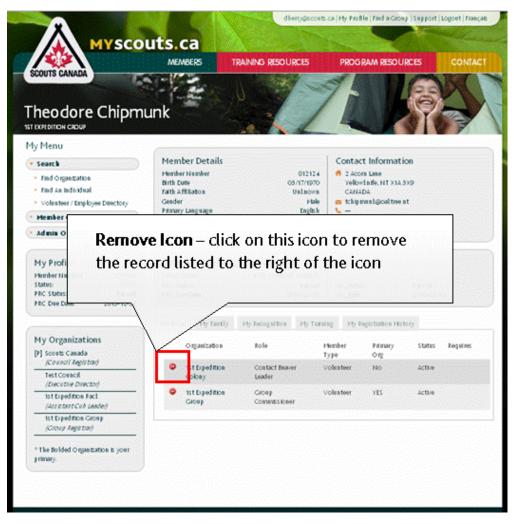
## Information Tabs (Organization Profile):







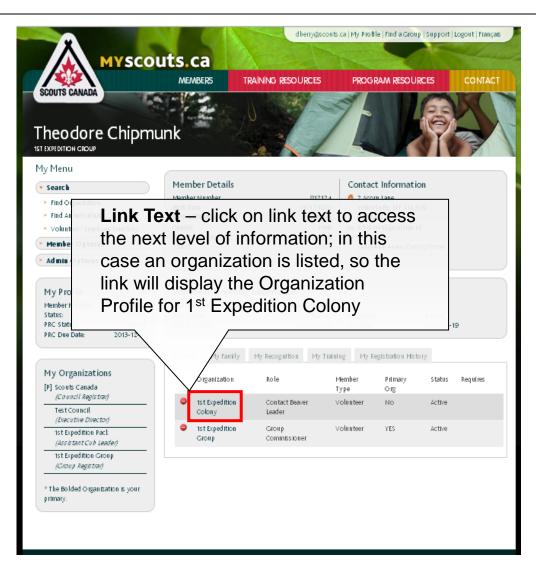
#### Remove Icon:







### Link Text:

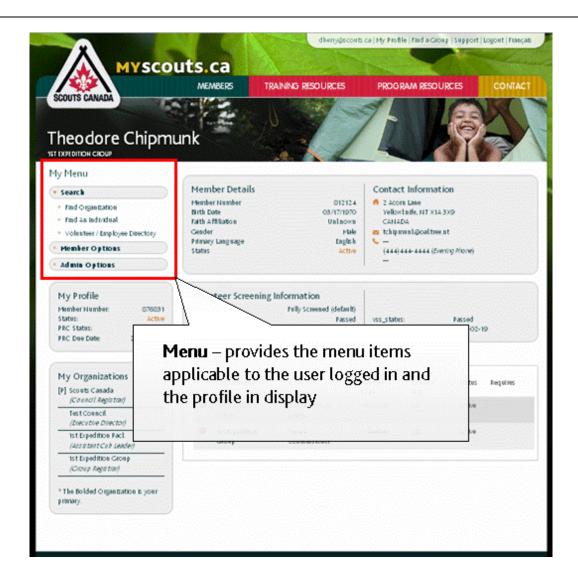






# Overview Screen Anatomy

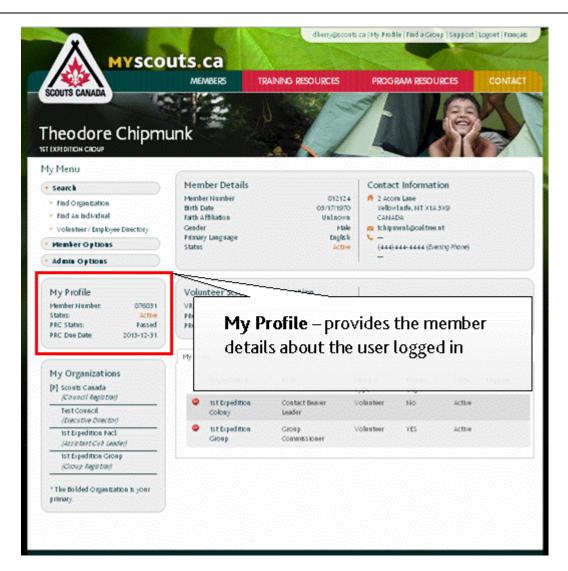
### Menu:







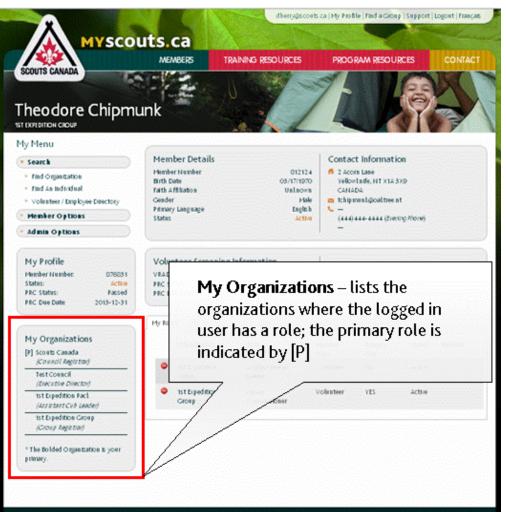
# My Profile:







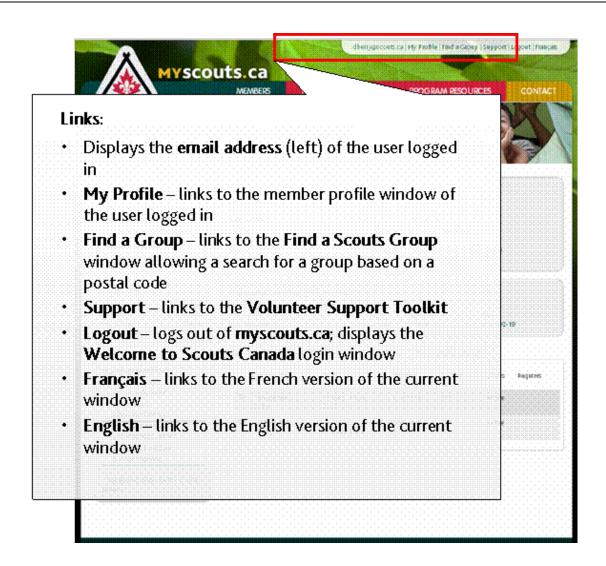
# My Organization:







#### Links:







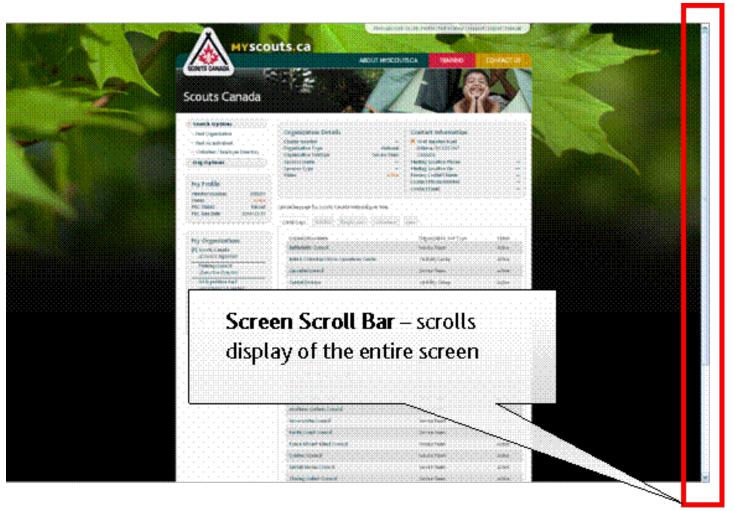
### **Action Button:**







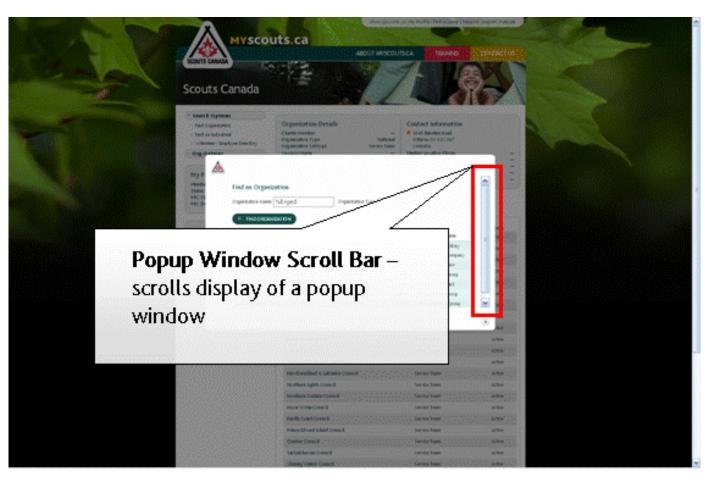
### Screen Scroll Bar:







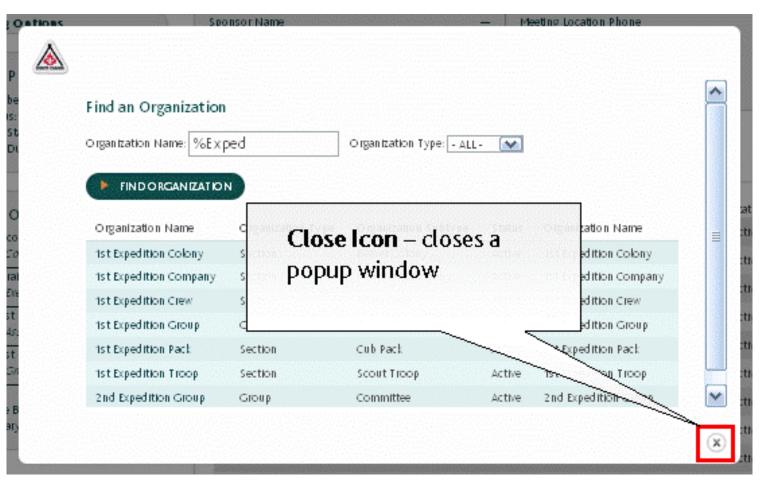
# Popup Window Scroll Bar:







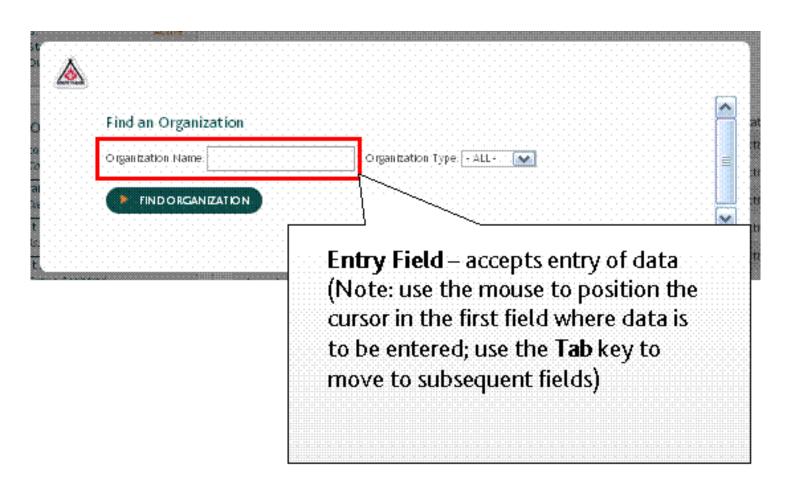
### Close Icon:







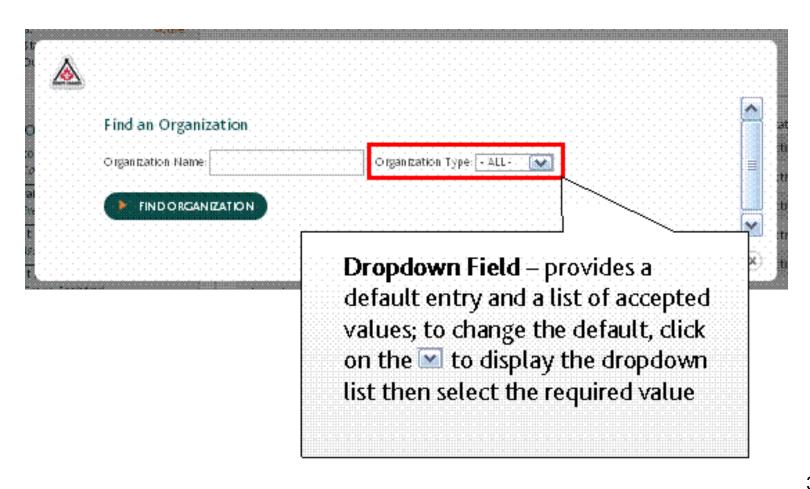
### Entry Field:







### Dropdown Field:







# Overview Scouts Canada Organization Hierarchy

#### **Battlefield Council**

Lynn Valley Area

1st Waterford Group

1st Waterford A Colony

1st Waterford A Pack

1st Waterford A Troop

And so on...

1st Port Dover Group

1st Port Dover A Colony

1st Port Dover A Pack

1st Port Dover Sea Scouts Troop

And so on...

Fruitbelt Area

2nd West Grimsby Group

2nd West Grimsby A Colony

And so on...





### Member Status:

myscouts.ca	MMS
Active	Active
Inactive	Inactive-Retired, Inactive-Unknown
Pending	Prospective
Not Renewed	Active Not Renewed
Decline Service	No term
No term	Waitlisted





### Member Role Status:

myscouts.ca	MMS
Active	No term
Inactive	No term
Pending	No term
Not Renewed	No term
Decline Service	No term





# Member Type:

myscouts.ca	MMS
Volunteer	Volunteer
Volunteer (SIT, AL, Kim, Keeo)	Youth
Participant	Youth
Employee	Employee

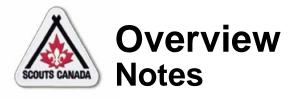




### Wildcards:

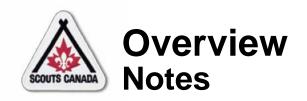
myscouts.ca	MMS
% (one or more characters)	* (one or more characters)
_ (one character)	? (one character)



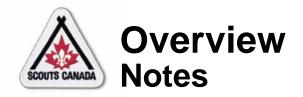


- A member can be a participant, a volunteer, and/or an employee at the same time, for example:
  - A participant (Rover) and a volunteer (Assistant Cub Leader)
  - An employee (Camp Staff) and a participant (Venturer Scout)
- The relationship between a member and their role in an organization is called a member role; when a member has more than one member role, one is designated as the primary member role
- The primary member role organization for the member displays upon logging in to myscouts.ca

- When a member has <u>one</u> member role, their administration rights are hierarchically-based and flow down from the organization their member role is attached to.
- When a member has <u>more than one</u> member role, their administration rights are hierarchically-based on the role with the most rights and flow down from the organization it is attached to.
- A member has a status
- Each member role has a status
- A member must have a status of **Active** in at least one member role to be active for a scouting year
- myscouts.ca retains all member role records in the member's registration history



- Accounts have been introduced in myscouts.ca that allow:
  - Parents to go online to register and manage the records of one or more children
  - Volunteers to go online to register themselves and their children, and to manage their own records and the records of their children
- Everyone 18 years of age and over has an account in myscouts.ca; for those less than 18 years of age, a parent has an account
- myscouts.ca has a Volunteer/Employee Directory that lists the name, member type, member role, organization, email address, phone number, city, province, and postal code of all volunteers who have indicated they wish to be listed, and of all employees



- Training and recognition records can be viewed and added in myscouts.ca
- Organizations cannot be added in myscouts.ca; Council Registrars can add an organization in myscouts.ca admin
- Duplicate member records cannot be merged in myscouts.ca; Council Registrars can merge records in myscouts.ca admin
- Primary roles cannot be changed in myscouts.ca;
   Council Registrars can change primary roles in myscouts.ca admin



# myscouts.ca

# Module 2 Access myscouts.ca

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# Access myscouts.ca

- Log In
- View My Member Profile
- Request a New Password
- Update Password or Language



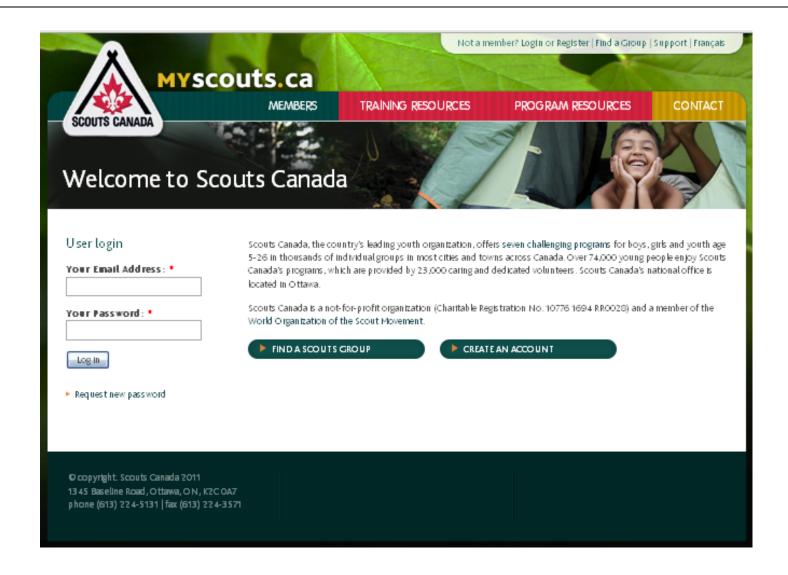
### Access myscouts.ca

- myscouts.ca is accessible at <a href="https://myscouts.ca">https://myscouts.ca</a>.
- Upon the introduction of myscouts.ca, all employees, adult volunteers, adult participants and parents/guardians with a valid and unique email address will be given accounts; new members are given accounts when they register with a valid and unique email address (new parents/guardians create their own accounts).





### Access myscouts.ca Log In

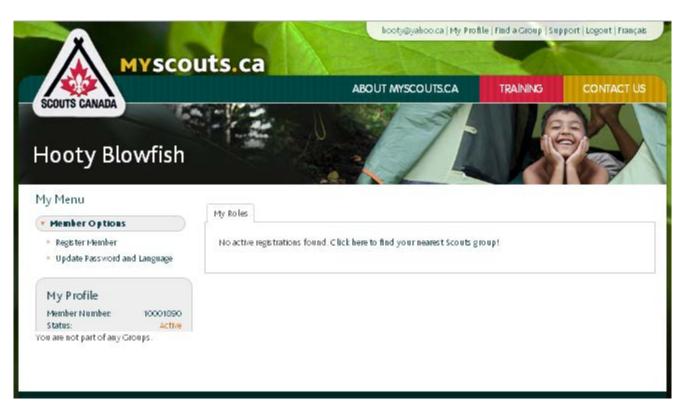






### Access myscouts.ca Log In

Account holder - parent/guardian or participant 18 years of age or over with an account:

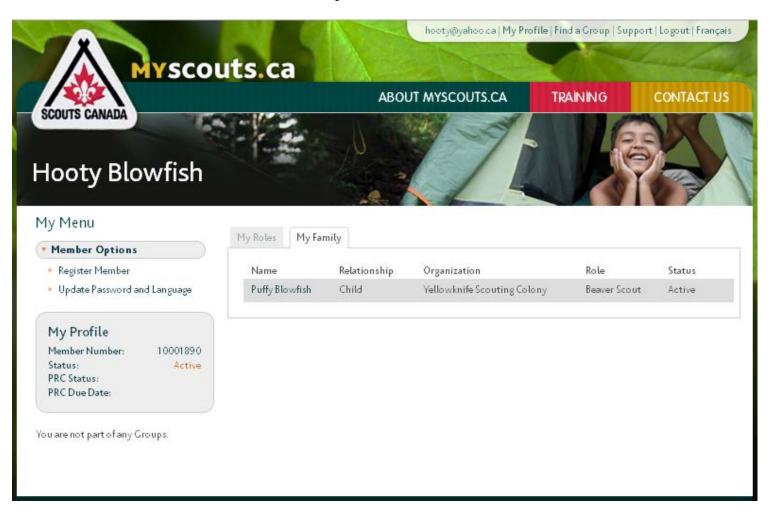






# Access myscouts.ca

#### Account holder with a family member:

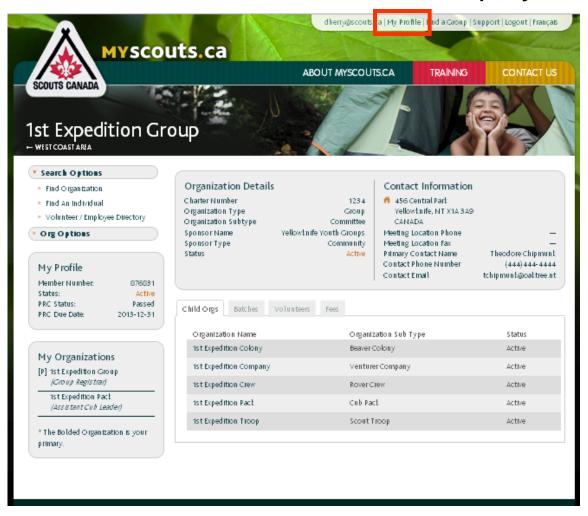






### Access myscouts.ca Log In

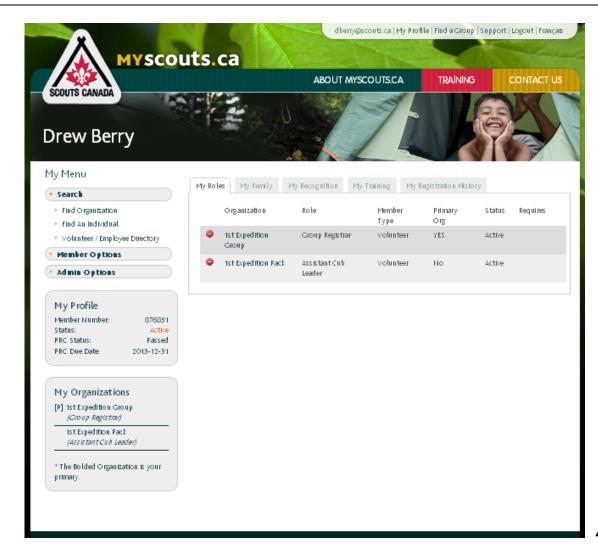
### Account holder who is a volunteer or an employee:





### Access myscouts.ca Log In

Account holder who is a volunteer or an employee – My Profile:





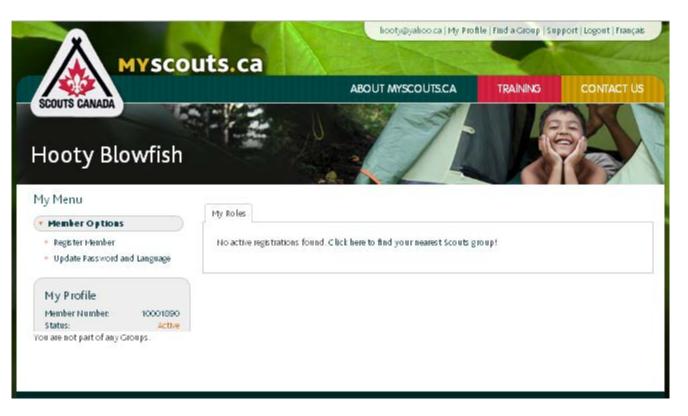


- A member profile contains the information on record for a member.
- Volunteers and employees can view their member profile information at any time.
- Parents/guardians who have an account can view their own member profile content and the content for their children/charges
- Participants 18 years of age and over who have an account can view their own member profile content.





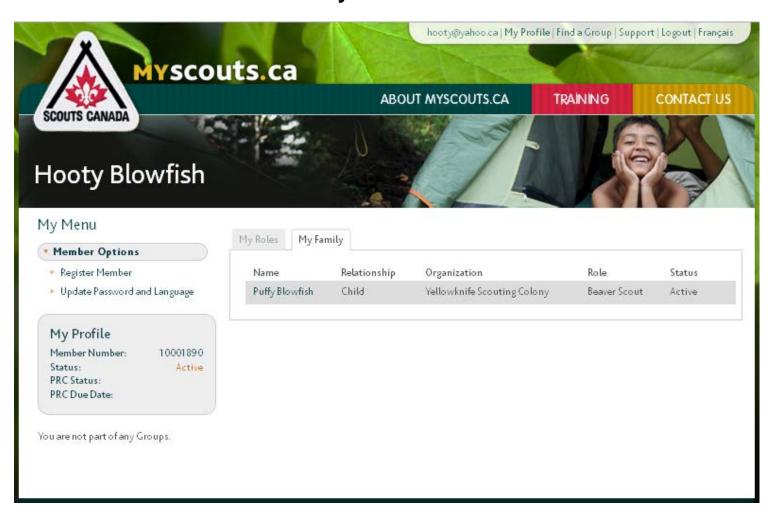
Account holder - parent/guardian or participant 18 years of age or over with an account:







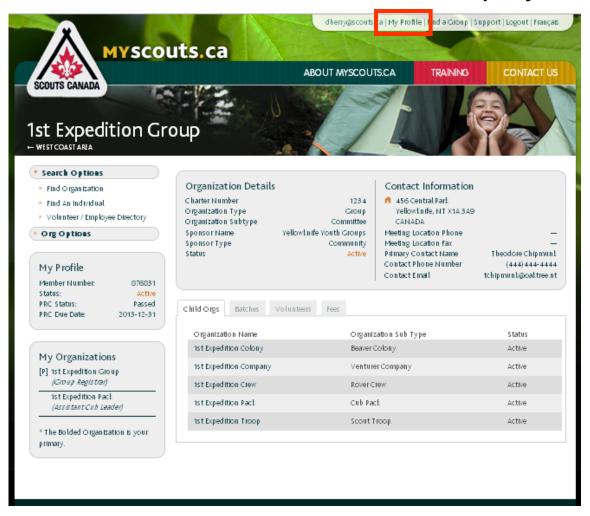
#### Account holder with a family member:







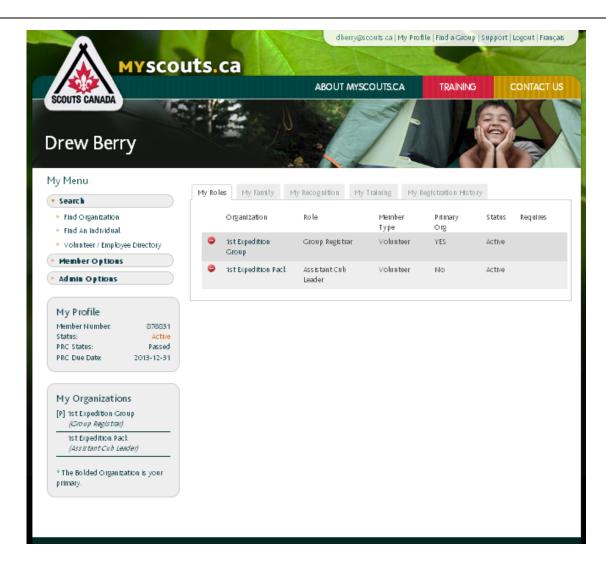
#### Account holder who is a volunteer or an employee:





# **Access myscouts.ca** View My Member Profile

Account holder who is a volunteer or an employee – My Profile:







### Links at upper right of the window:

hooty@yahoo.ca | My Profile | Find a Group | Support | Logout | Français





#### Content at the left of the window:







### Access myscouts.ca Request a New Password







### Access myscouts.ca Request a New Password







#### Request a new password – Scouts Canada email example:

#### dberry@scouts.ca,

A request to reset your myscouts.ca password has been made. You may login to live.myscouts.ca by clicking on the link below or copying and pasting it in your browser. You will be asked to answer verification information prior to accessing your profile.

https://myscouts.ca/user/rest/78974687ihiunni867677

This is a one-time login, so it can be used only once and it expires after one day.

After logging in, you need to go to 'My Profile' and click 'Member Options' and 'Update Password and Language'.

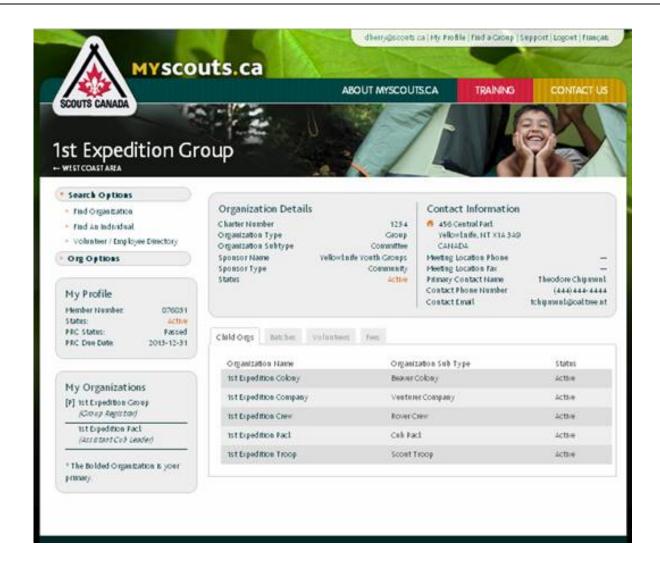
If you have any issues please contact myscouts.ca Support at 1-888-726-8876.

Thank you, myscouts.ca Support Team





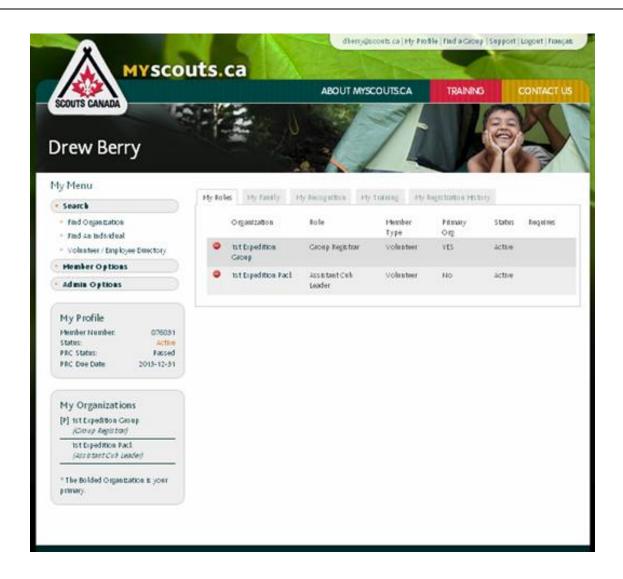
### Access myscouts.ca Request a New Password







# Access myscouts.ca Update Password or Language







# Access myscouts.ca Update Password or Language

Contractors are not appreciate	
dberry@scouts.ca	
Account information	
Your Password:	
Confirm password:	
To change the current user password, enter the new password in both fields.	
Language settings	
Language:	
Canadian English	
French (Français Canadien)	
This account's default language for e-mails, and preferred language for site	
presentation.	
Save	



# myscouts.ca

# Module 3 Search myscouts.ca

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# Search myscouts.ca

- Find an Organization
- Find an Individual
- Volunteer/Employee Directory

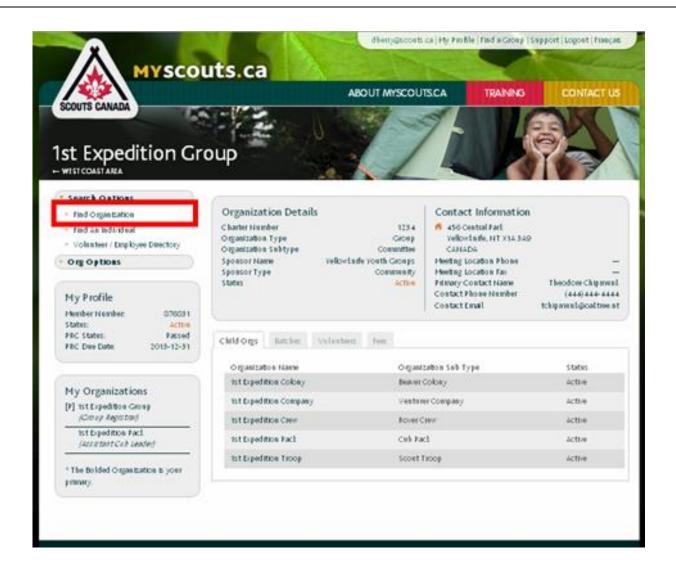


### Search myscouts.ca

- Volunteers and employees can search myscouts.ca to access:
  - Organization profiles
  - Member profiles
  - Volunteer/employee information
- Volunteers and employees have access to profiles only within their administrative hierarchy (for example, a Group Registrar can access member profiles within their Group and their Sections; they can access organization profiles for their Sections).



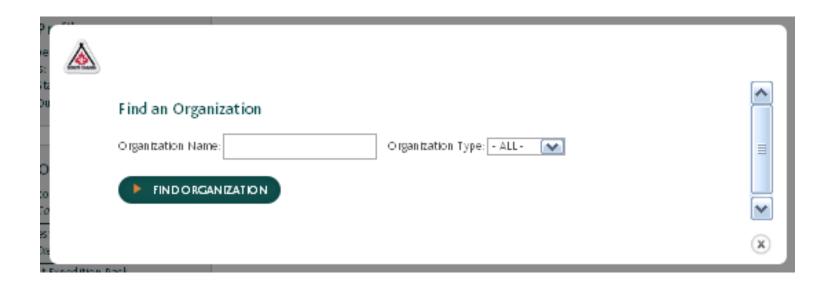








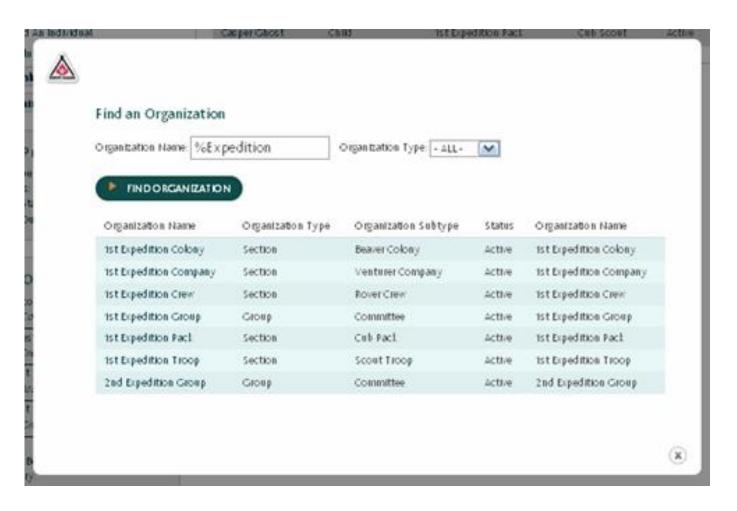
### Search for an organization:







#### When a match is found:







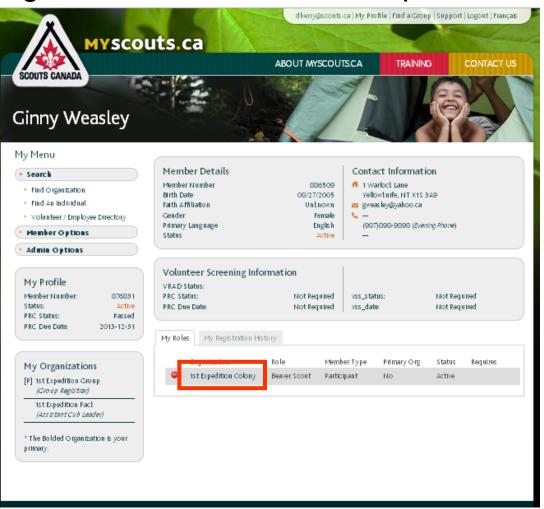
#### View an organization profile:







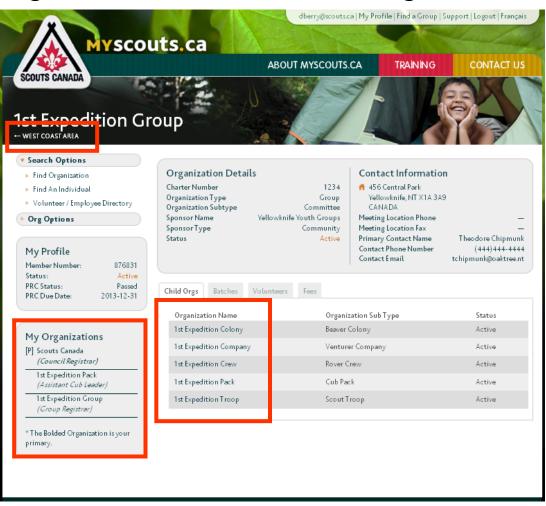
### Access an organization from a member profile:







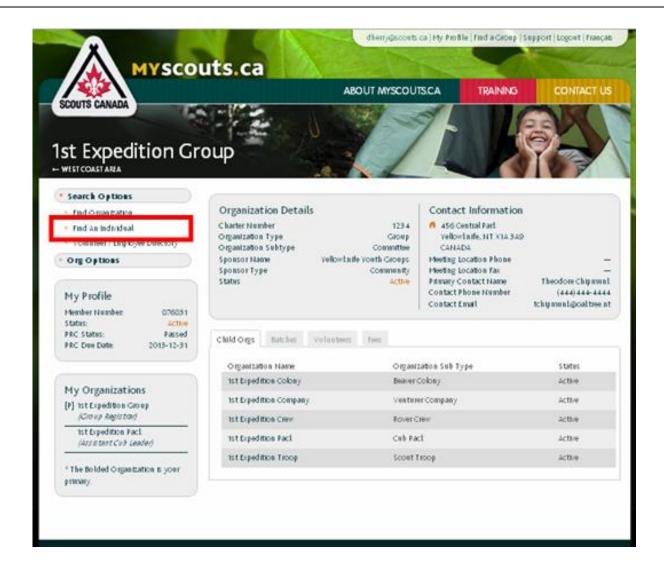
### Access an organization from another organization:







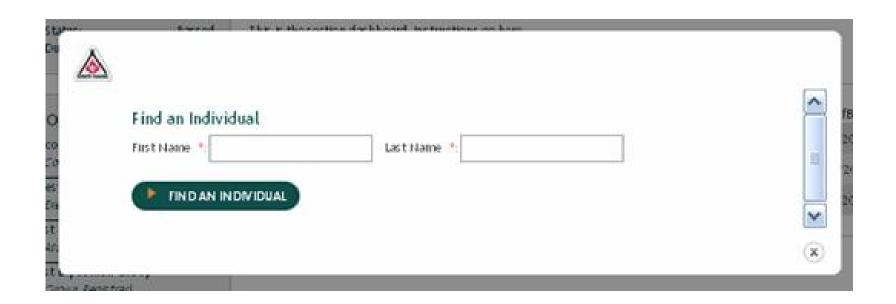
#### Search myscouts.ca Find an Individual







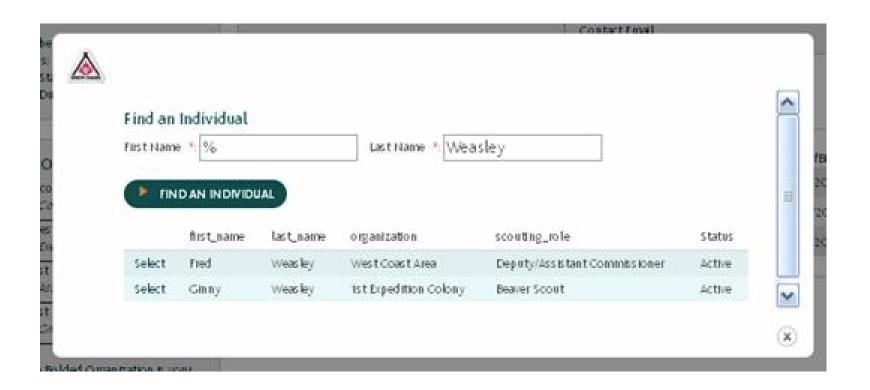
#### Search for an individual:







#### When a match is found:







#### Select an individual:

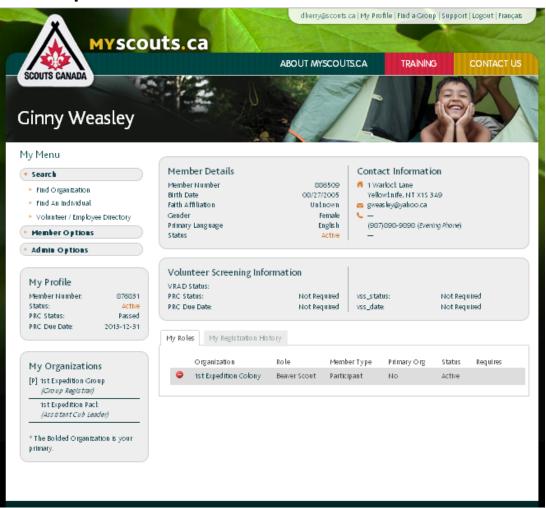






#### Search myscouts.ca Find an Individual

#### View a member profile:

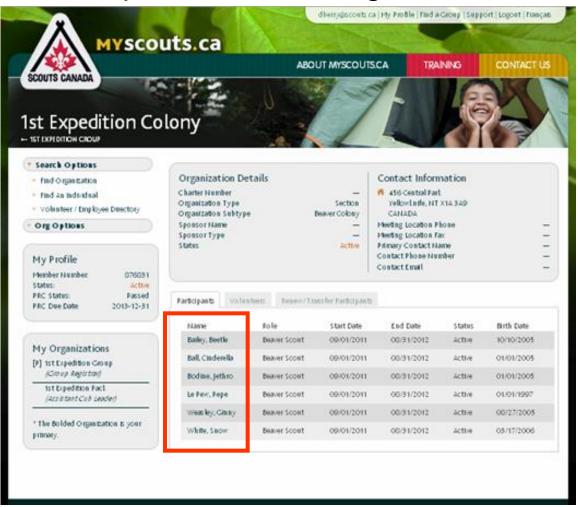






### Search myscouts.ca Find an Individual

#### Access a member profile from an organization:



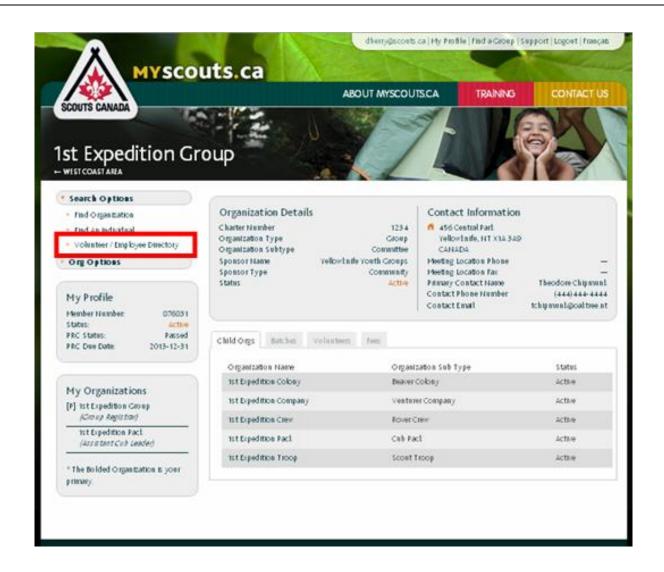
# Search myscouts.ca Volunteer/Employee Directory

- The Volunteer/Employee Directory is a listing that includes all current volunteers who have indicated (when they registered) that they wish to be listed in the directory, and all employees.
- All volunteers and employees can use the Volunteer/Employee Directory to search myscouts.ca for information about volunteers/employees across Canada (regardless of their organization association).
- The Volunteer/Employee Directory lists only basic information about volunteers/employees; member profiles are not accessible from this search option.
- If a volunteer no longer wants to be listed in the Volunteer/Employee Directory, they can opt-out.





#### Search myscouts.ca Volunteer/Employee Directory

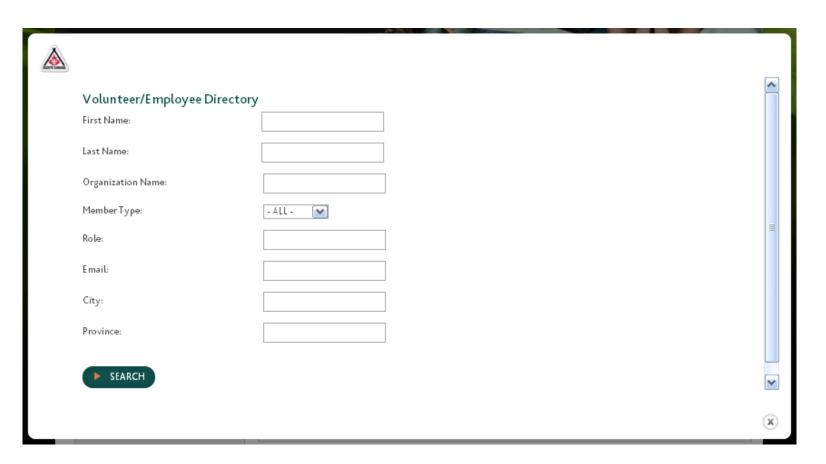






### **Search myscouts.ca Volunteer/Employee Directory**

#### Search the Volunteer/Employee Directory:

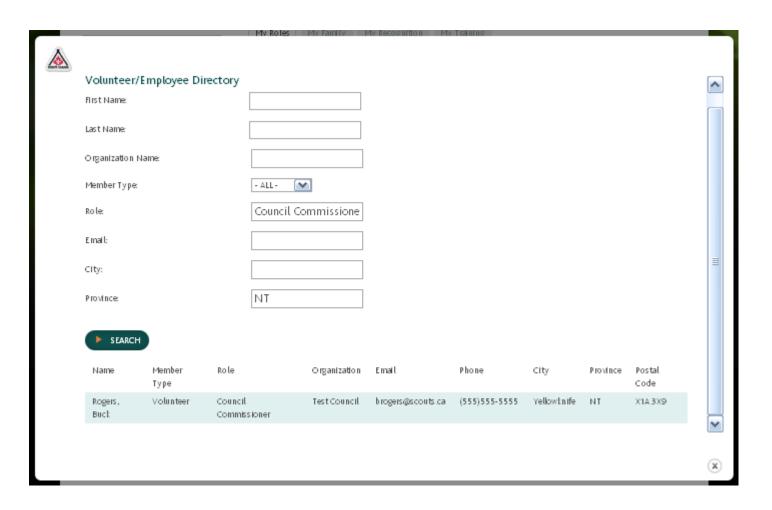






### **Search myscouts.ca** Volunteer/Employee Directory

#### When a match is found:





### myscouts.ca

### Module 4 Prepare for Registration

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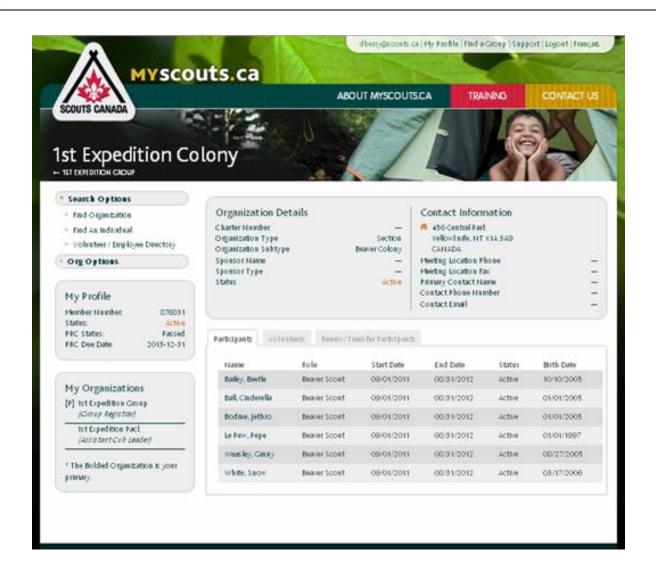
#### **Prepare for Registration**

- View/Edit Organization Contact Details
- View/Edit Meeting Details
- Set Up Online Registrations and Payments
- Set Fees
  - View Fees for an Organization
  - Edit Fees for an Organization
  - Add Fees for an Organization





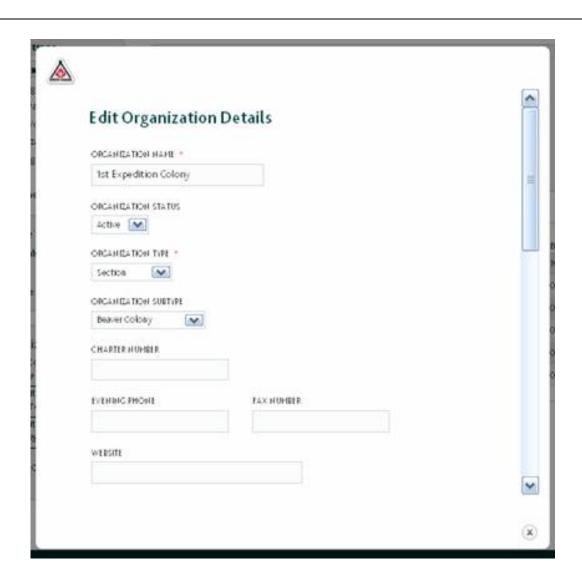
### Prepare for Registration View/Edit Organization Contact Details







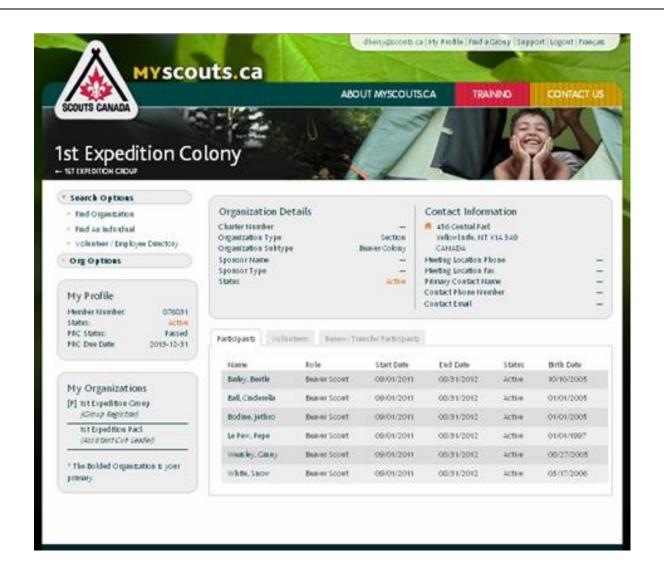
## **Prepare for Registration View/Edit Organization Contact Details**







### Prepare for Registration View/Edit Meeting Details







## **Prepare for Registration** View/Edit Meeting Details

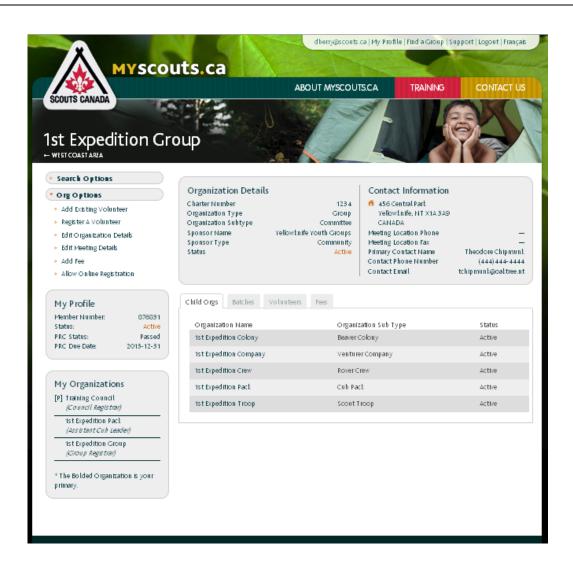
<u> </u>		
Edit Meeting De		
OrgDetails		
ORGANIZATION SPONSOR		
Yellowitnife Youth Gro	ирс	
SPONISOR TYPE		
Contents ity	M	
HEETING SOCATION		
Victoria Community G	intre	
SOCATION TVPE		
chusch 💌		
HEETING DAY		
Thursday 💌		
HEETING START TIME		
700 PH M		
CHOSED CROUP?		
No M		



- One of the prerequisites for online registration is to set up Group bank account information to deposit Group proceeds collected through the online payment system; once collected, the appropriate fee for each level of Scouts Canada will be separated and forwarded by Electronic Funds Transfer (EFT) to the appropriate Council and Group.
- In order to offer the opportunity for online registration, the following information is required from each Group:
  - Name and address of the banking institution
  - Name of the account holder as it appears on bank statements/cheques
  - Transit number
  - Account number
  - A voided cheque (scanned copy is accepted)
- For more information, contact your Council Office.

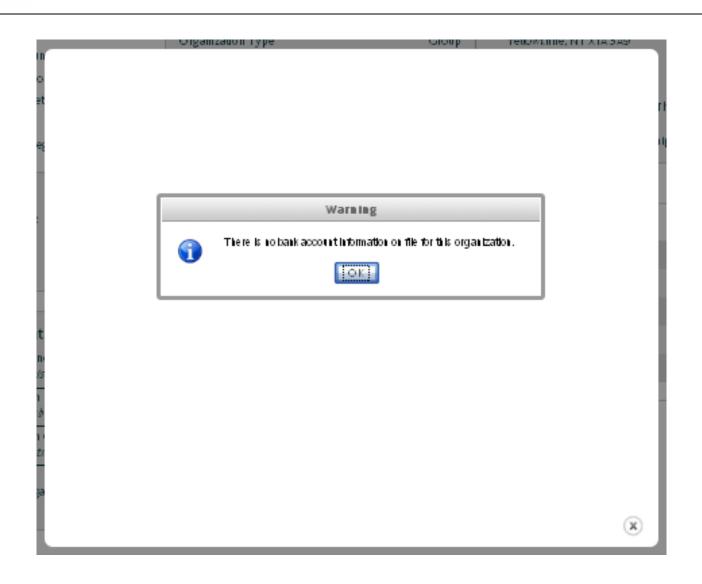




















- Fees are set in the organization profile at the National, Council, and Group levels.
- Fees are entered by the Treasurer (or designate) as separate records for participants and for volunteers.
- After National and Council set their next-session budgets, Groups set their budgets.
- Fees for the next session year must be entered, at all levels, by May 1st to accommodate early registration.
- There is no default fee the Treasurer (or designate) must set the fees prior to registration of members; an error will occur if a fee is not entered for the date of registration.
- Fees can be viewed throughout the year and special fees can be entered for different timeframes (for example, a partial year fee).





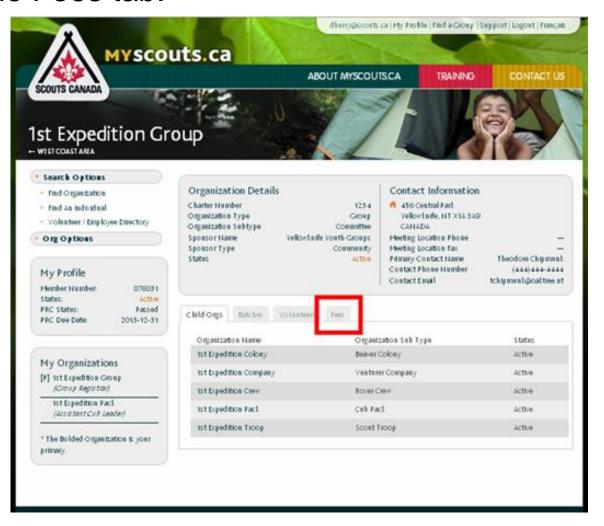
Access the organization where the fee is to be viewed:







#### Access the Fees tab:







#### View fees:





- Fees can be edited by the Treasurer (or designate) at any time throughout the year.
- When editing fees, ensure that the fee record being edited is for the correct session year.
- Registration fees for the current session year need to remain until August 31.
- If fees for the same member type have an overlapping timeframe, the fee with the earliest start date overrides any other fees until its end





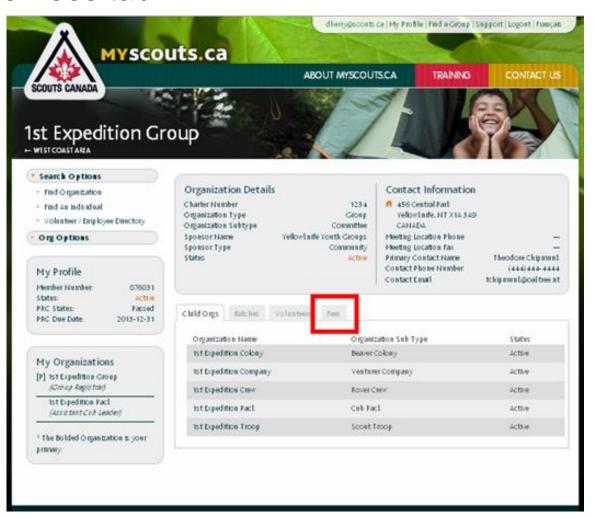
Access the organization where the fee is to be edited:







#### Access the Fees tab:







#### View fees for the organization:







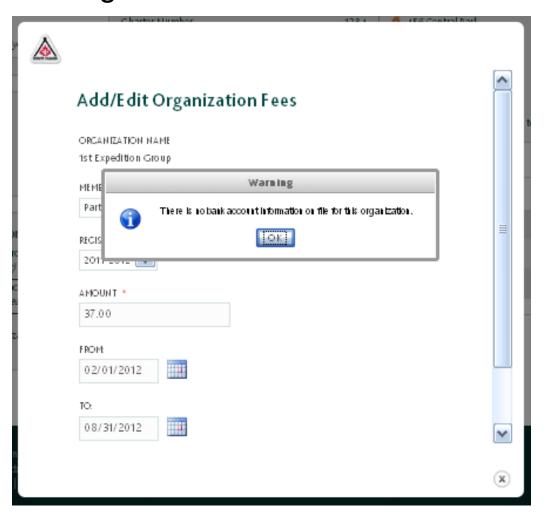
#### Select EDIT FEES:







#### Edit fees for the organization:







#### Edit fees for the organization:



- Fees can be entered by the Treasurer (or designate) throughout the year.
- When a fee is added for an organization it cannot be deleted.
- If fees for the same member type have an overlapping timeframe, the fee with the earliest start date overrides any other fees until its end date.





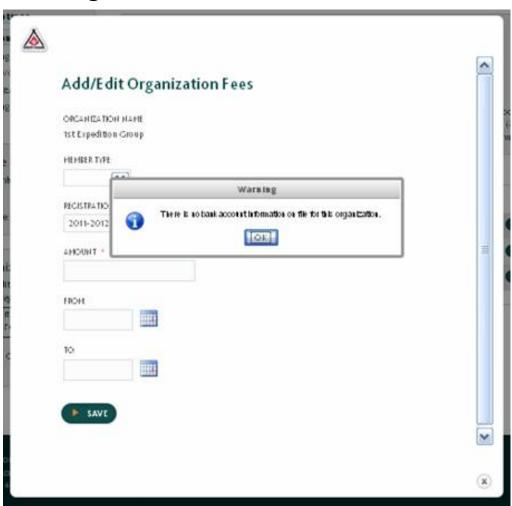
Access the organization where the fee is to be added:







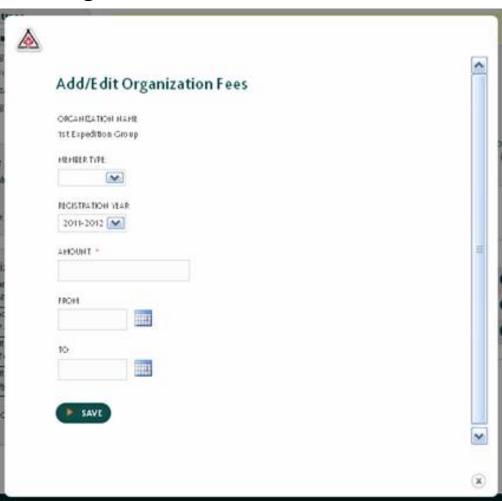
#### Add fees for the organization:







#### Add fees for the organization:





### myscouts.ca

### Module 5 Prepare for Registration Event(s)

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#### **Prepare for Registration Event(s)**

- Print Pre-filled Registration Forms
- Print Member Listing (by Organization)
- Print PRC/VSS Expiry Listings
- View Member Status
  - View Member/Member Role
     Status by Individual
  - View Member Role Status by Organization



#### **Prepare for Registration Event(s)**

- Prior to the registration event(s), Registrars can print:
  - Pre-filled Registration Forms
  - Member Listing (by Organization)
  - PRC/VSS Expiry Listing
- Registrars can also view the statuses of an individual or an organization.
- Registrars can perform these tasks at any time throughout the year.
- For more information see Reporting.



# Prepare for Registration Event(s) Print Pre-filled Registration Forms

- Printing the pre-filled registration forms for each returning member provides a starting point for registration.
- The pre-filled registration form contains the registration information used in the previous session so <u>only the</u> <u>information that has changed</u> needs to be recorded.
- Using the pre-filled registration forms saves time during the registration events <u>and</u> when entering the information into myscouts.ca.
- The Registrar can print these forms at any time throughout the year.



# Prepare for Registration Event(s) Print Membership Listing (by Organization)

- The Membership Listing (by Organization) provides a listing of volunteers and participants by organization; it includes member numbers, addresses, phone numbers, and email addresses.
- The Member Listing can be used to find contact information for members and to see where members were registered for the previous session year – it can also be used to see who might be changing organizations (for example, moving from Beavers to Cubs).
- The Membership Listing can be used as a checklist to track returning members who have submitted applications.
- The Registrar can print this listing at any time throughout the year.



# Prepare for Registration Event(s) Print PRC/VSS Expiry Listing

- The Police Record Check (PRC)/Vulnerable Sector Screening (VSS) Expiry Listing shows the PRC and VSS statuses for each volunteer.
- It indicates who has had a PRC and VSS in the last three years, who needs them this year, and whether they are complete.
- The Registrar can print this listing at any time throughout the year.

- The Registrar can view the registration status of members to see who is registered currently and who has already registered for the upcoming session year.
- This provides a glimpse at the number of people the registrar might expect to be registering in person as returning members.





#### Prepare for Registration Event(s) View Member Status – View Member/ Member Role Status by Individual

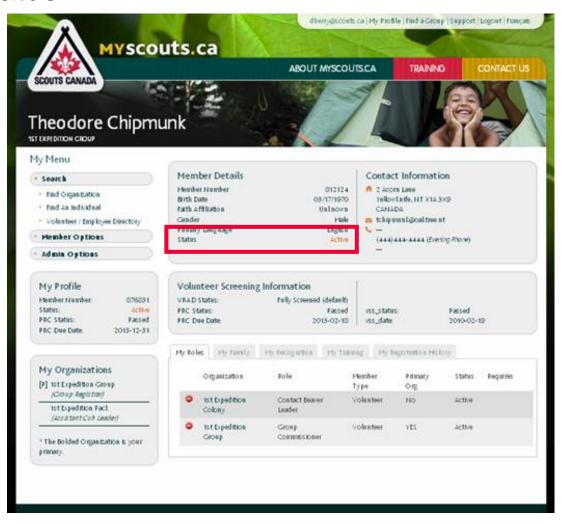






### Prepare for Registration Event(s) View Member Status – View Member/ Member Role Status by Individual

#### Member status:

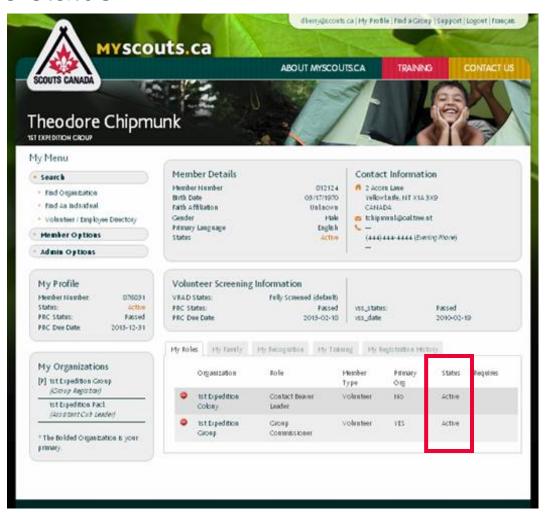






### Prepare for Registration Event(s) View Member Status – View Member/ Member Role Status by Individual

#### Member role status:

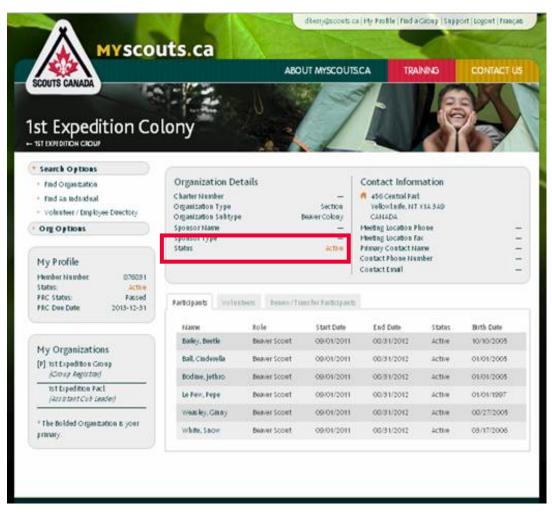






# Prepare for Registration Event(s) View Member Status – View Member Role Status by Organization

#### Organization status:

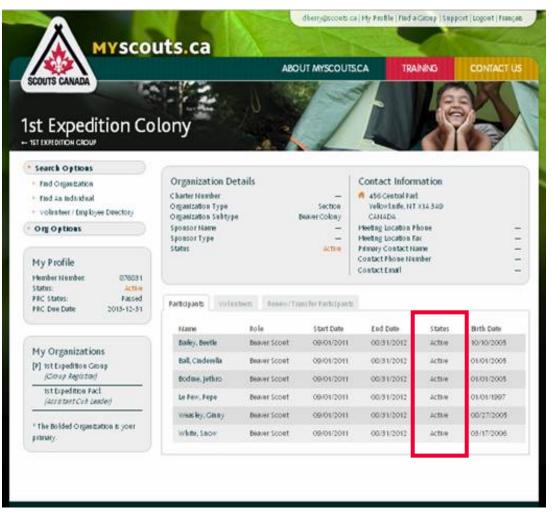






# Prepare for Registration Event(s) View Member Status – View Member Role Status by Organization

#### Participant – member role status:

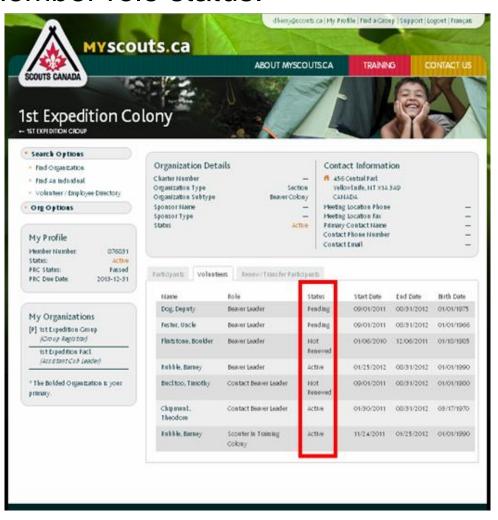






# Prepare for Registration Event(s) View Member Status – View Member Role Status by Organization

#### Volunteer - member role status:





### myscouts.ca

## Module 6 Renew/Transfer Members

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- Renew/Transfer Participants
- Renew a Volunteer
- Renew Yourself or Your Child/Charge
- Transfer Members



- Renew/Transfer Participants
  - Participants in a section can be renewed, transferred, or renewed and transferred (within the Group) in a single request
- Renew a Volunteer
  - Volunteers are renewed individually
- Renew Yourself or Your Child/Charge
  - You can renew yourself or your child/charge; a credit card payment is required for any fees
- Transfer Members
  - Volunteers can be transferred; participants can be transferred to other Groups by the Council Registrar using myscouts.ca admin



- The registration year runs from September 1 to August 31.
- Memberships can be renewed for the current registration year until the February rollover.
- Memberships can be renewed for the upcoming session year starting May 1, (prior to the start of the registration year) and any time during the current registration year until the February rollover.



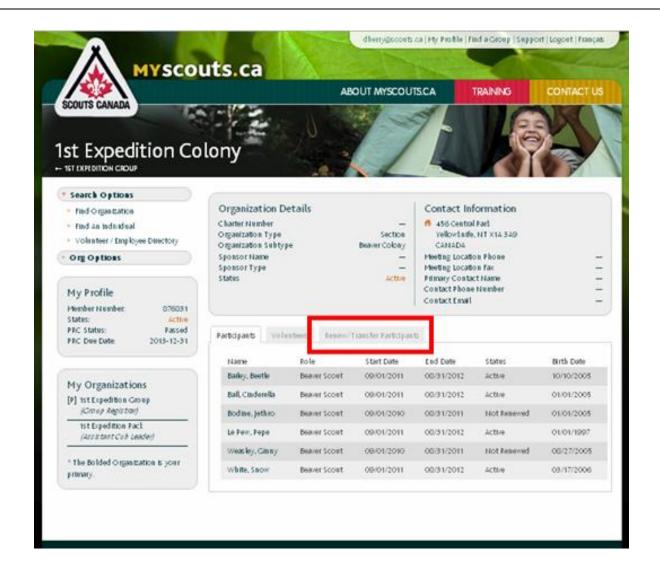
- Members can be transferred at any time.
- After the registration event(s), the Registrar uses the information collected on paper registration forms to enter registration information for returning members into myscouts.ca.



- For returning participants who register at a registration event, the Registrar can perform a mass participant renewal for all participants in a Section (based on information collected on the paper registration forms at the registration event[s]).
- Registrars can also perform a mass transfer of Active participants among Sections within the Group; transfers can be done at any time throughout the year.
- Instead of searching for and renewing/transferring these members one at a time, the Registrar can renew/transfer one or more returning participants in a Section (per page) – all in one request; note that this feature is not available for volunteers.
- The Registrar can renew participants for the upcoming registration year at any time after May 1<sup>st</sup>; a participant can be transferred at any time.



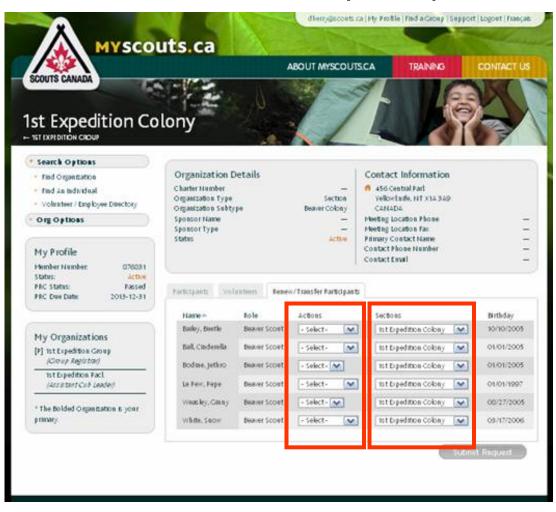








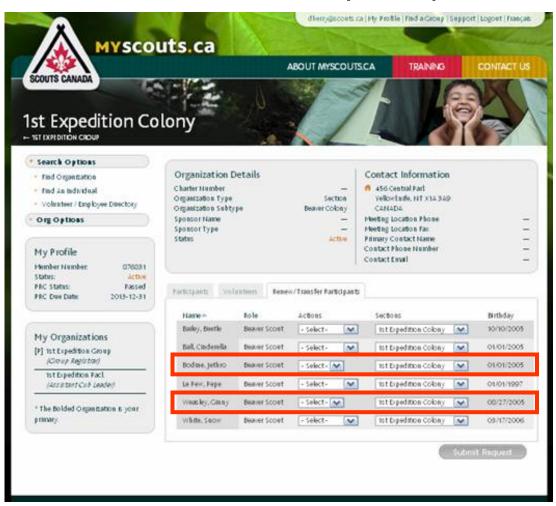
#### Renew/transfer/renew and transfer participants:







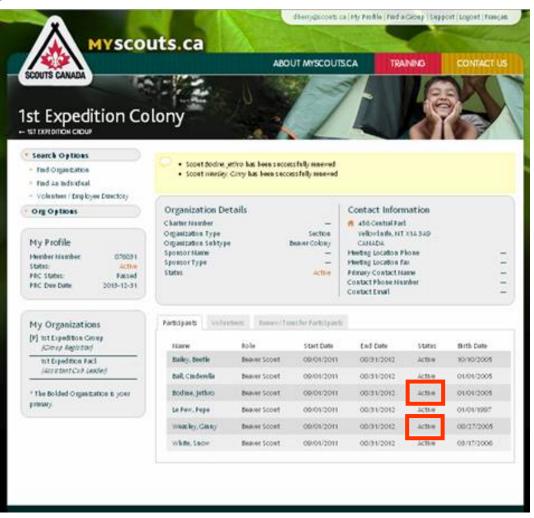
### Renew/transfer/renew and transfer participants:





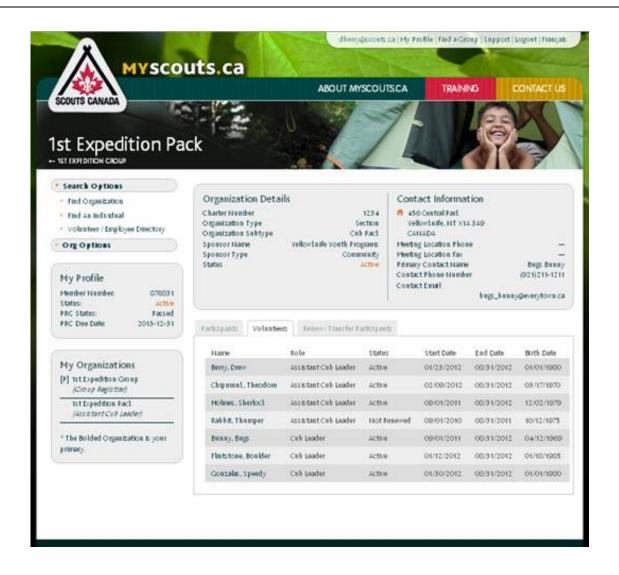


#### View results:





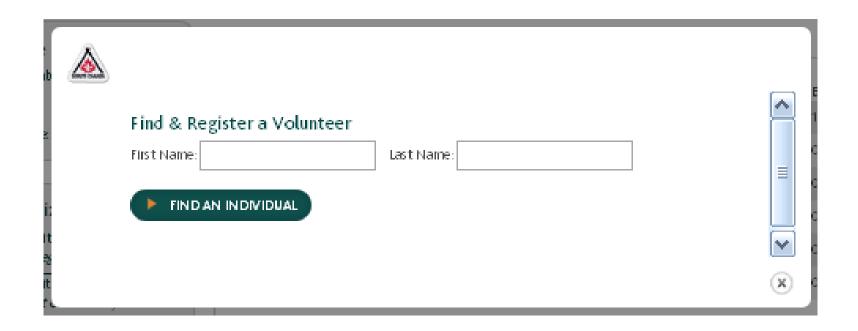








#### Search for the volunteer to renew:







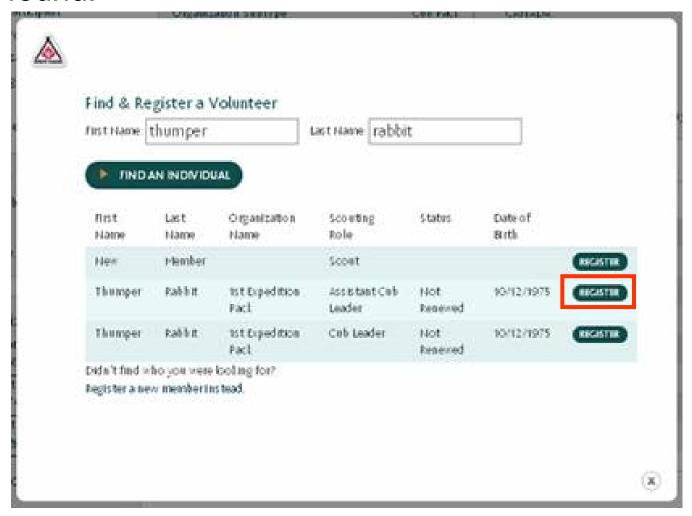
#### No match found:







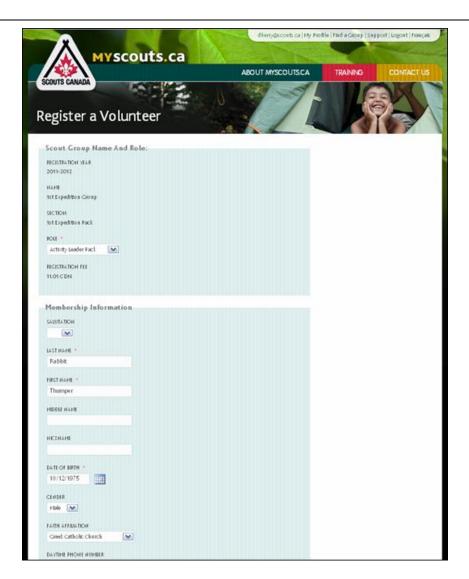
#### Match found:







Add and/or edit information in the Volunteer Registration form:





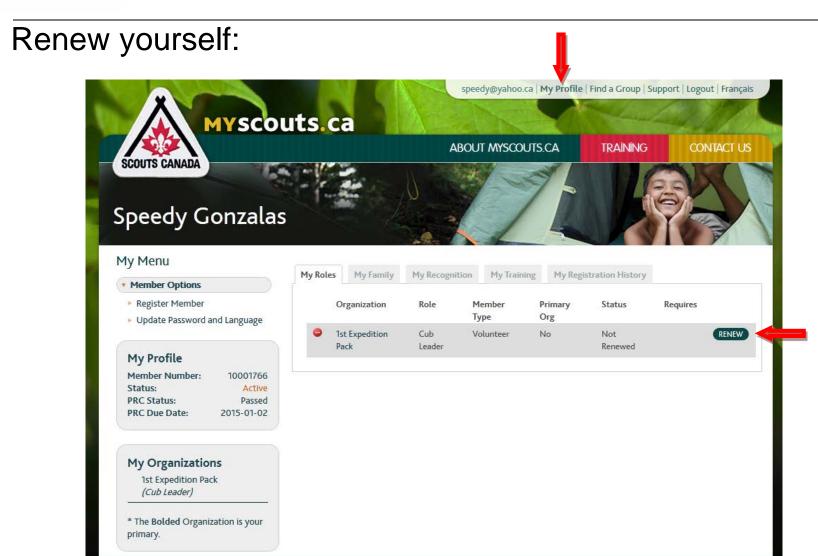


#### View results:





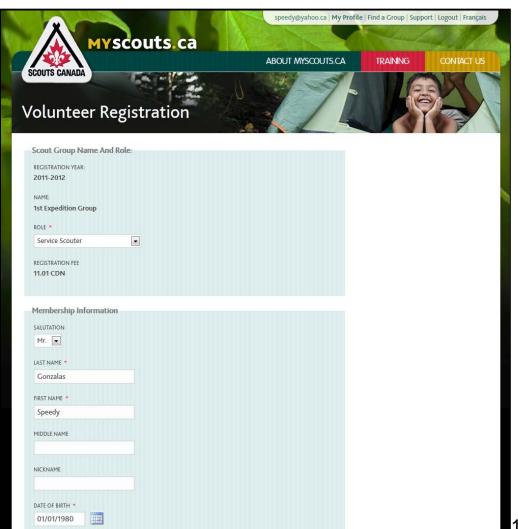








Add and/or edit information in the Volunteer Registration form:







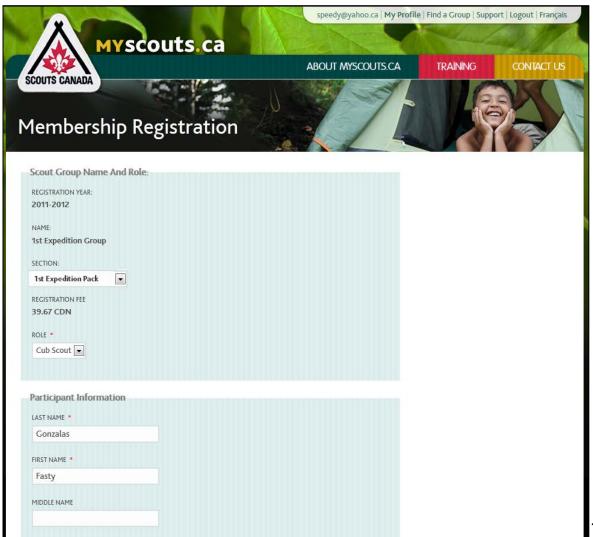
#### Renew your child/charge:







Add and/or edit information in the Membership Registration form:

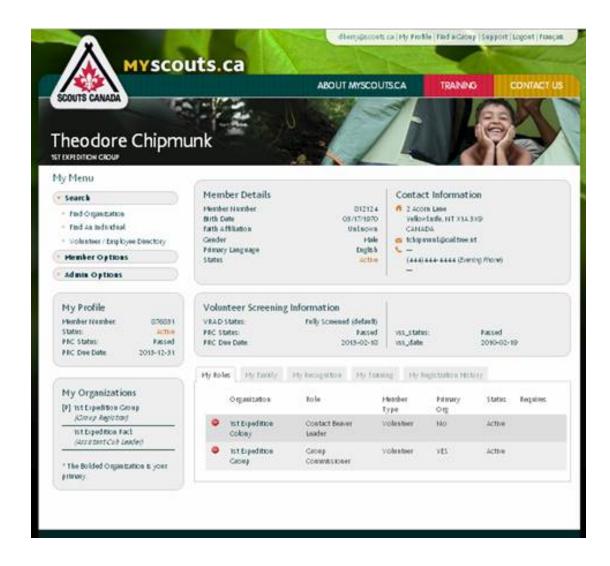




- The Group Registrar can transfer a volunteer within their Group from one Section to another, (for example, from Cubs to Scouts).
- The Council/Area Registrar can transfer volunteers to other organizations.
- A volunteer can be transferred at any time after they are registered.
- A Registrar can transfer one or more Active participants within the Group from one Section to another – in a single request (see Renew/Transfer Participants).
- A Council Registrar can transfer a participant to another organization using myscouts.ca admin.











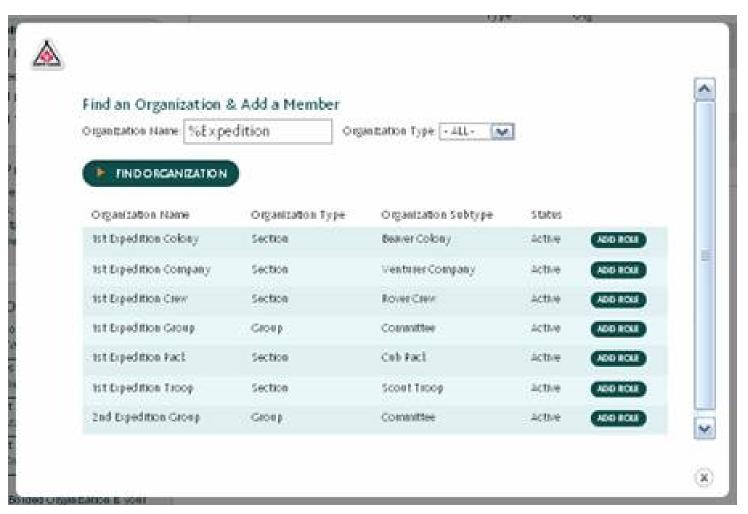
#### Search for an organization:







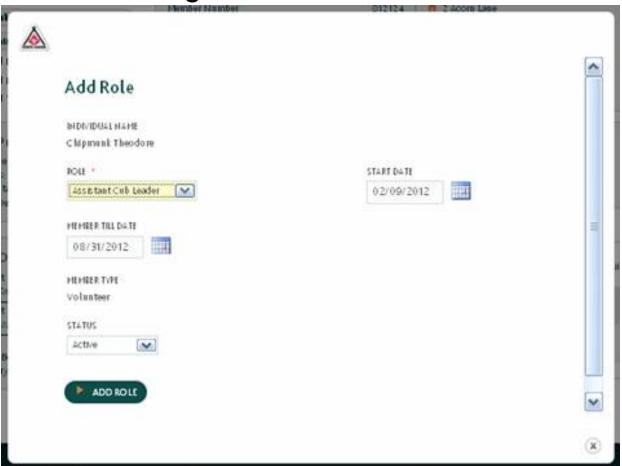
### Organization found:







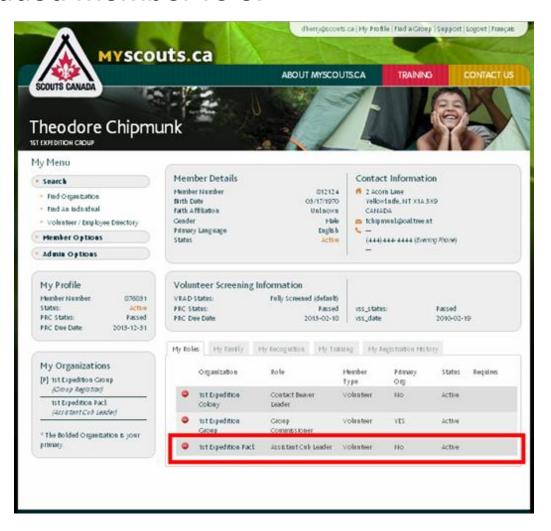
Add the member role in the organization where the member is transferring to:







#### View the added member role:

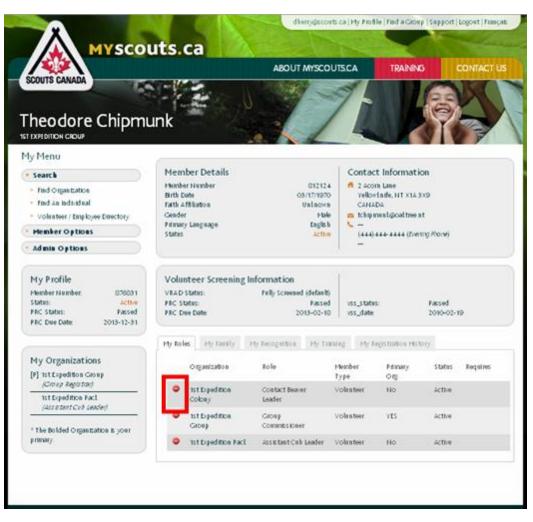






# Renew/Transfer Members Transfer Members

Remove the role that the member has transferred from:

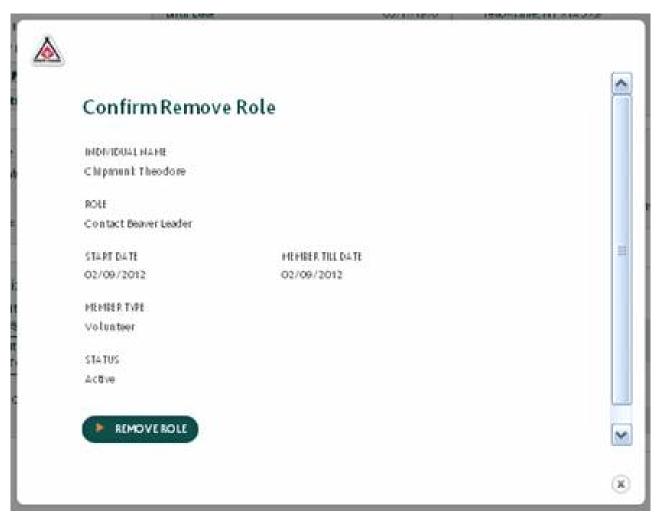






# Renew/Transfer Members Transfer Members

#### Confirm remove role:





# myscouts.ca

# Module 7 Register New Members

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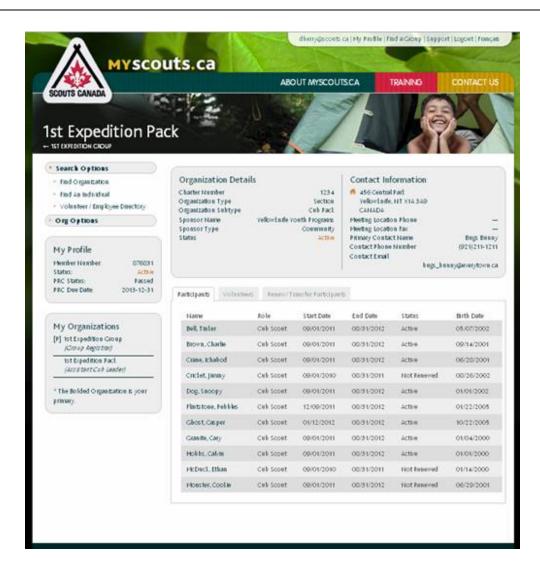
# **Register New Members**

- Register a New Participant
- Register a New Volunteer
- Self Register
  - Create an Account
  - Register Yourself or Your Child/Charge

- After the registration event(s), the Registrar uses the information collected on paper registration forms to enter registration information for new participants into myscouts.ca.
- The Registrar can enter new participant registration information into **myscouts.ca** at any time.



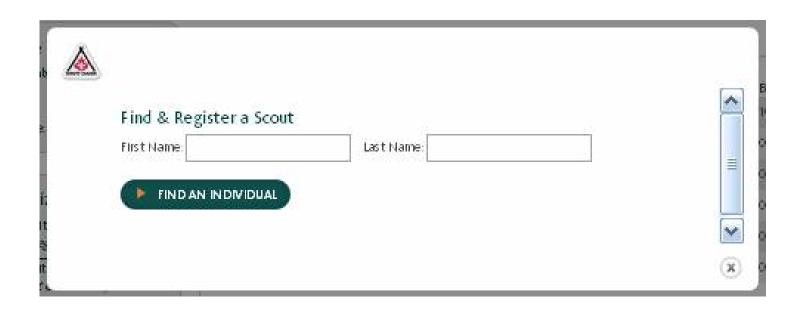








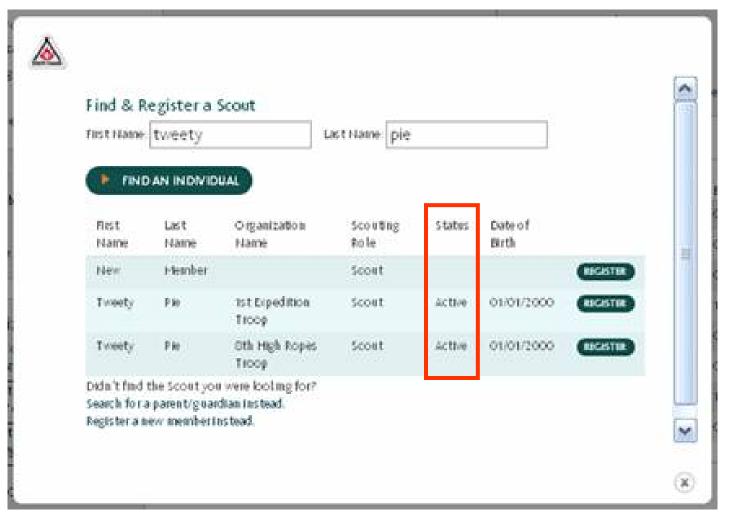
Search to verify if the participant has previously been entered:







#### Match found:







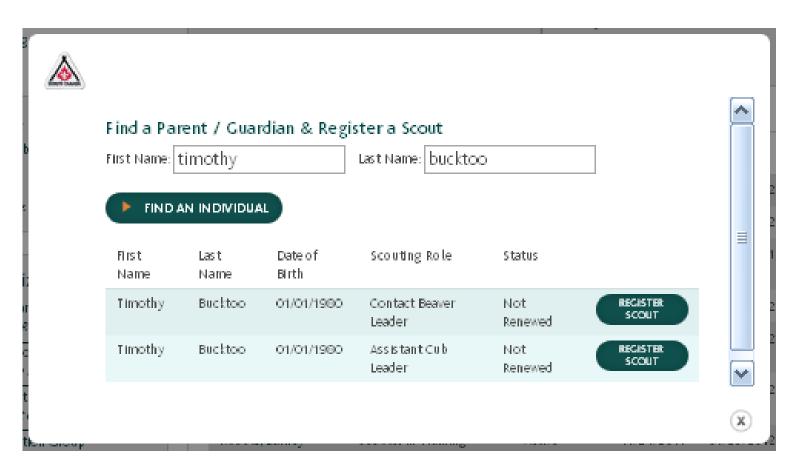
#### Match not found:







### Search for parent/guardian:







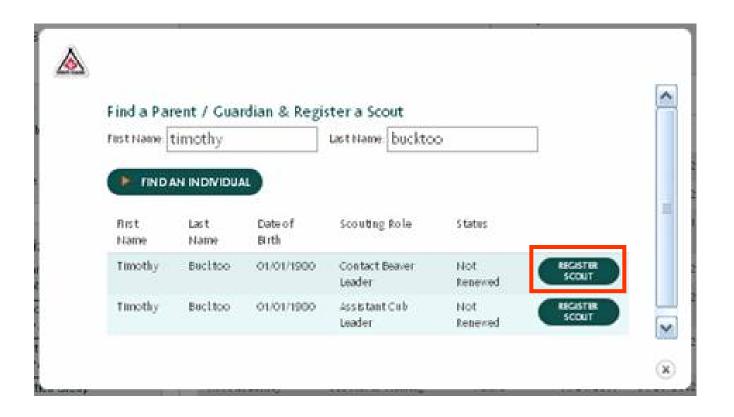
Search for parent/guardian – no match found:







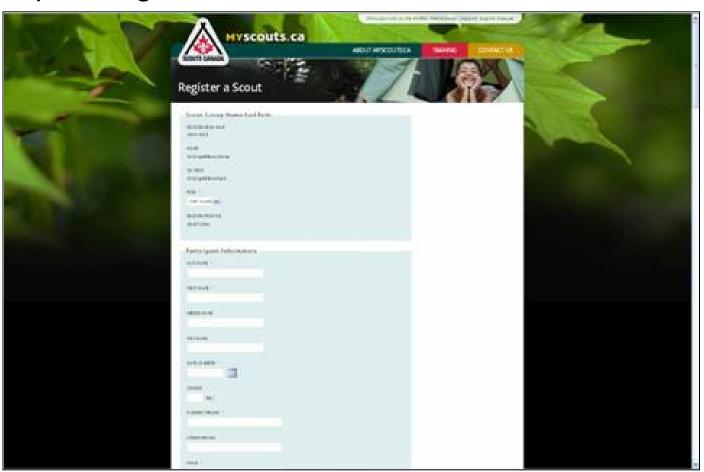
Search for parent/guardian – match found:







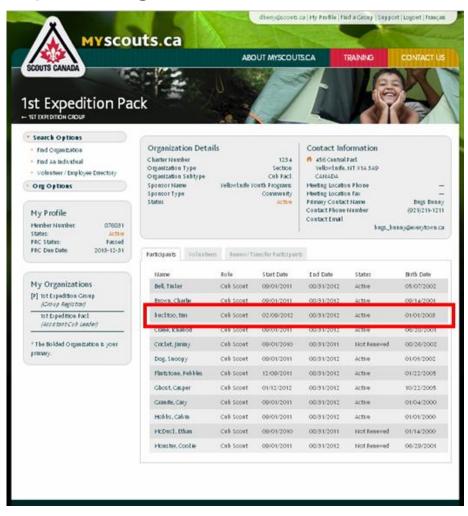
Complete registration form for a new participant registered under a parent/guardian:







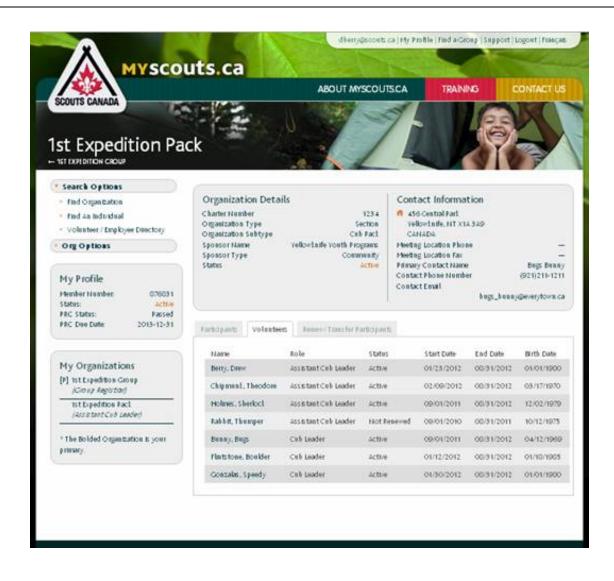
View new participant registration:



- Using the information collected on the paper registration form, the Registrar enters the new volunteer information into myscouts.ca.
- The Registrar can enter new volunteer registration information into myscouts.ca at any time.



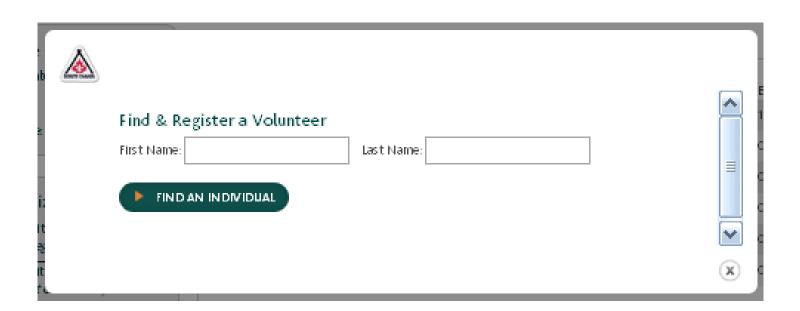








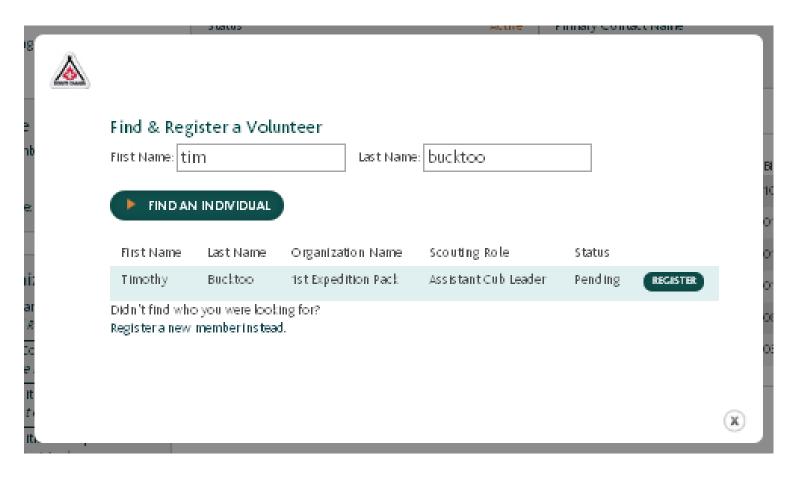
Search to verify if the volunteer has previously been entered:







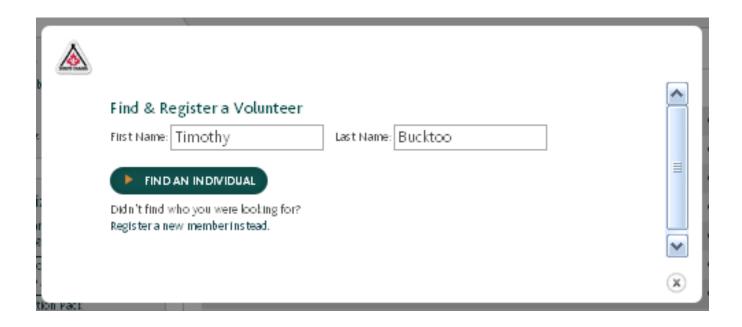
#### Match found:







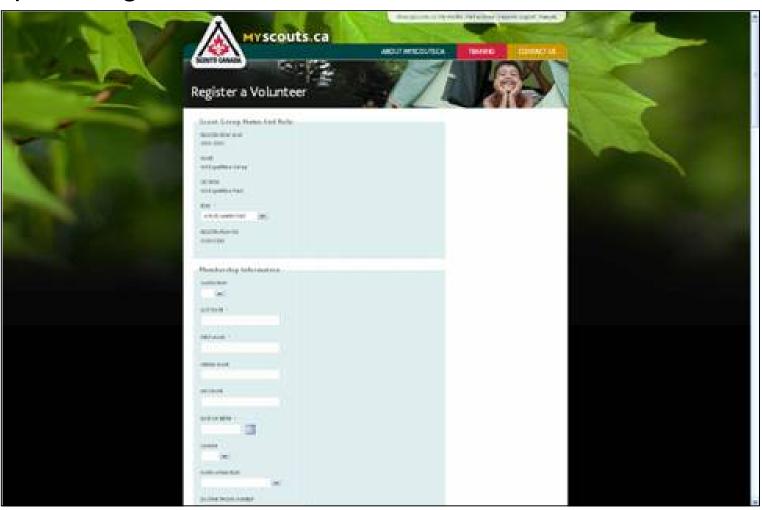
#### Match not found:







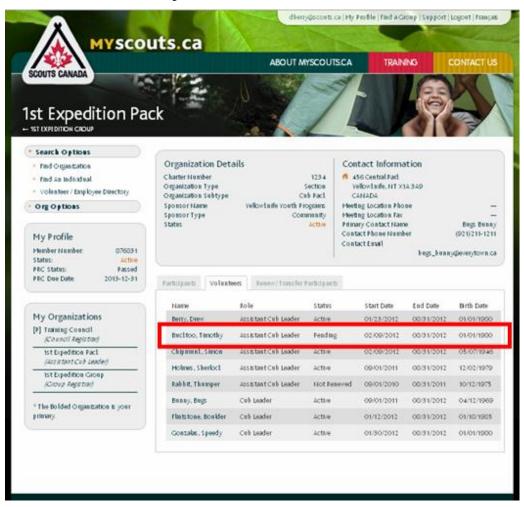
### Complete registration form:







#### View new volunteer entry:



# Register New Members Self Register

- Members of the public can register with Scouts Canada as:
  - Parents/guardians (to register their children/charges)
  - Volunteers
  - Participants 18 years of age and over
- There are two steps in the self-registration process:
  - Create an account
  - Register yourself or your child/charge
- This section is included in the training to provide information about the self-registration process; it is intended to help enable you to assist the public in registering online.





#### Create an account:







#### Enter account information:







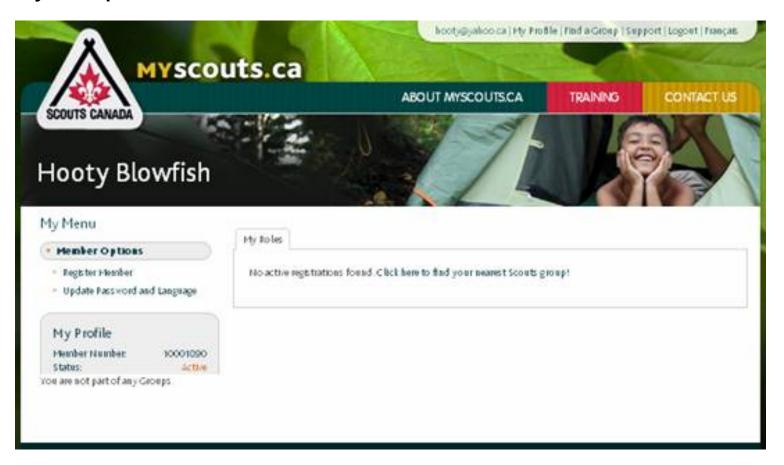
### Login:







#### View your profile:



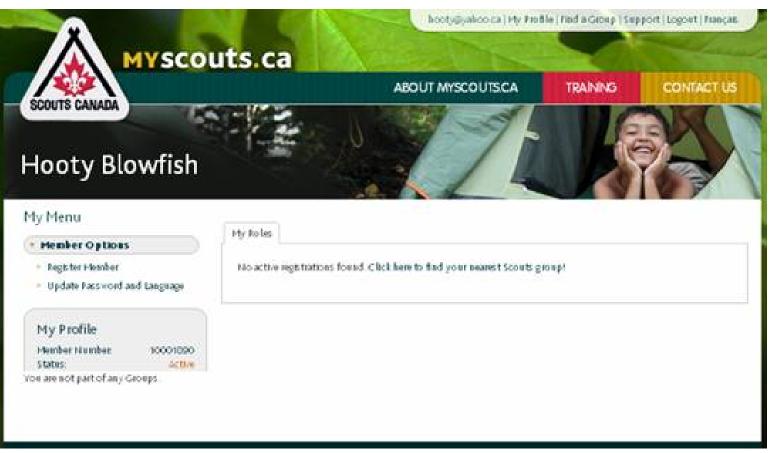


- Anyone with an account can self register; they can register themselves as a participant or a volunteer, or if they are a parent/guardian, they can register their children/charges as participants.
- To complete an online registration, a fee is involved requiring a credit card payment.
- Note that subsidies cannot be applied when using the online process.





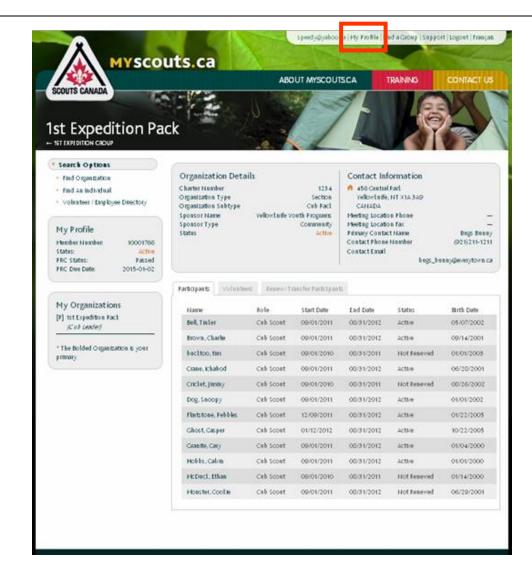
Access your profile (parent/guardian/member 18 years of age or older with account):







Access your profile (volunteer - organization profile):







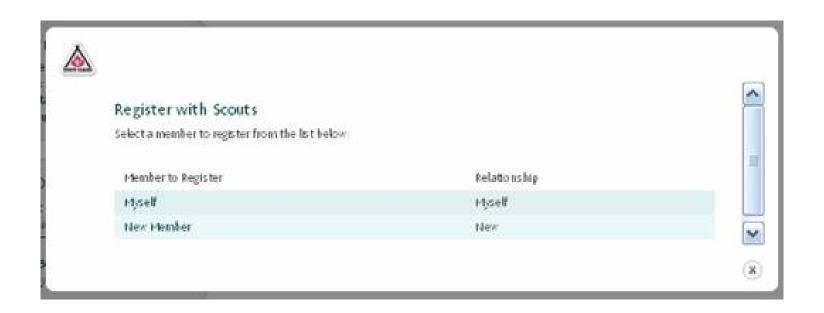
Access your profile (volunteer - member profile):







### Indicate the member to register:







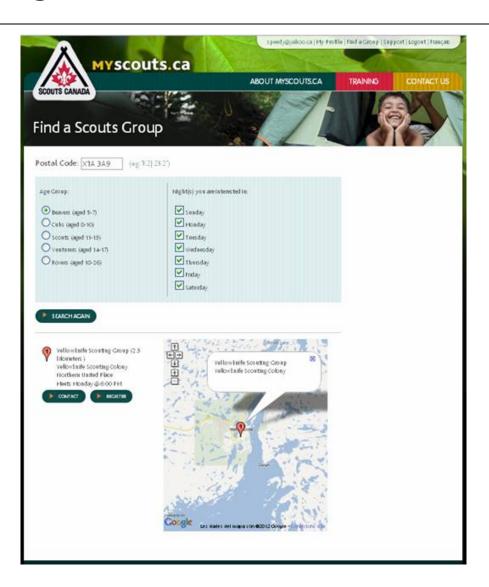
Search for a Scouts group by postal code:







Find a Scouts group:







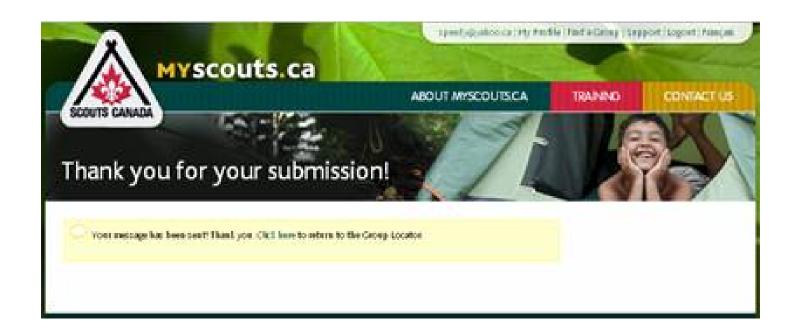
### Contact a Scouts group:







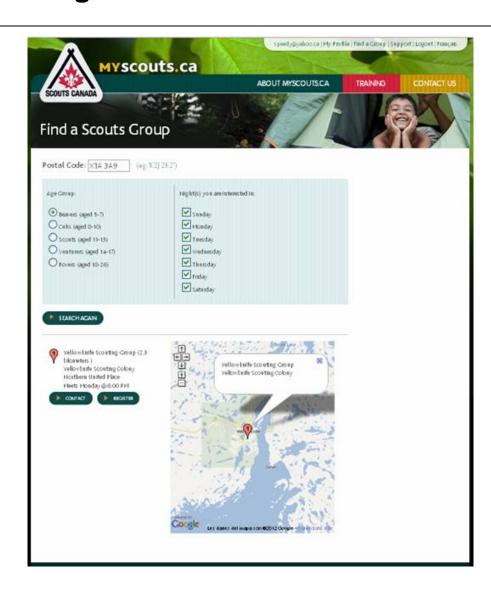
#### Complete Scouts group contact:







### Register:







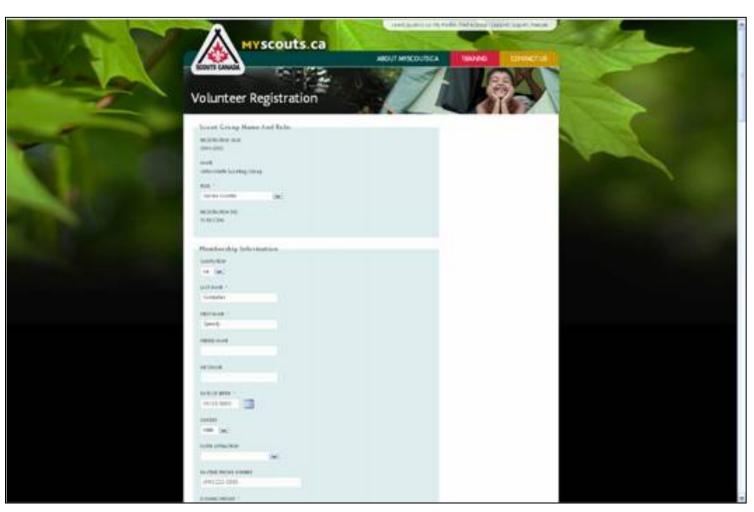
Confirm registration type – volunteer:







### Complete Volunteer Registration form:







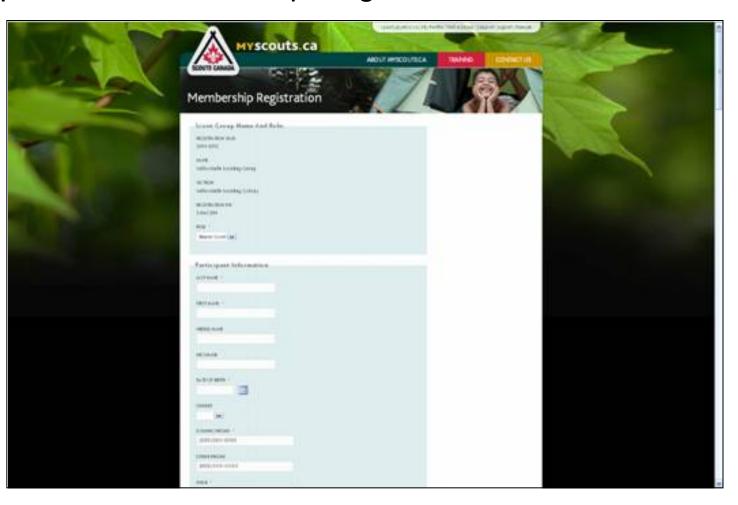
Confirm registration type – participant:







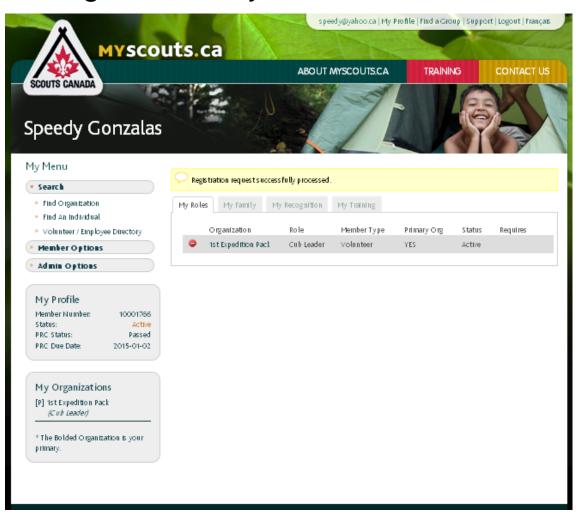
### Complete the Membership Registration form:







View the new registration – yourself:







View the new registration – child/charge (participant):





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# Module 8 Update Member Role Records

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### **Update Member Role Records**

- Add a Member Role Record
- Add an Existing Volunteer to an Organization
- Remove a Member Role Record



### **Update Member Role Records**

- The Registrar can:
  - Add a member role when a member takes on a new or additional role.
  - Remove a member role when a member is no longer participating in a specific role.
- The Registrar can affect records only within their administrative hierarchy
- The Registrar can update member roles as required, at any time throughout the year.



### **Update Member Role Records**

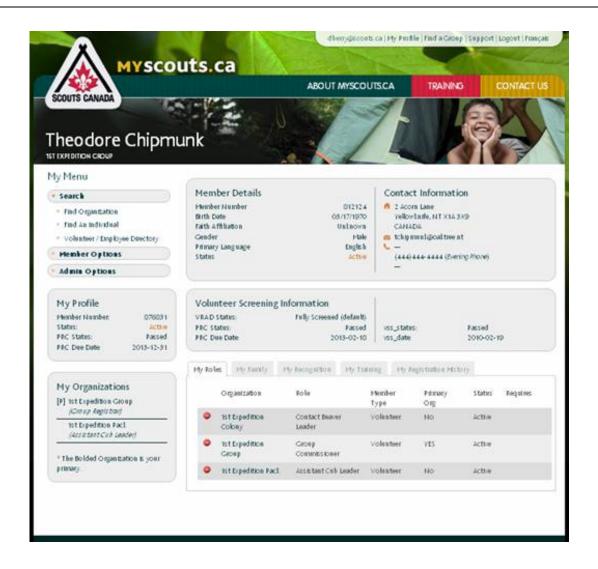
- A complete list of each member's organizations/roles (with an indication of their primary member role) can be viewed in their member profile under the My Roles tab; members and roles can also be viewed in the organization profile under the Volunteers tab.
- Member role records are permanently recorded in myscouts.ca.



- A Registrar can add a member role record for an active member whenever a member takes on a new or additional role.
- Member role records are added from the member's profile.
- Note that a volunteer role can be added for a Participant but a participant role <u>cannot</u> be added for a Participant.
- The Registrar can affect records only within their administrative hierarchy.











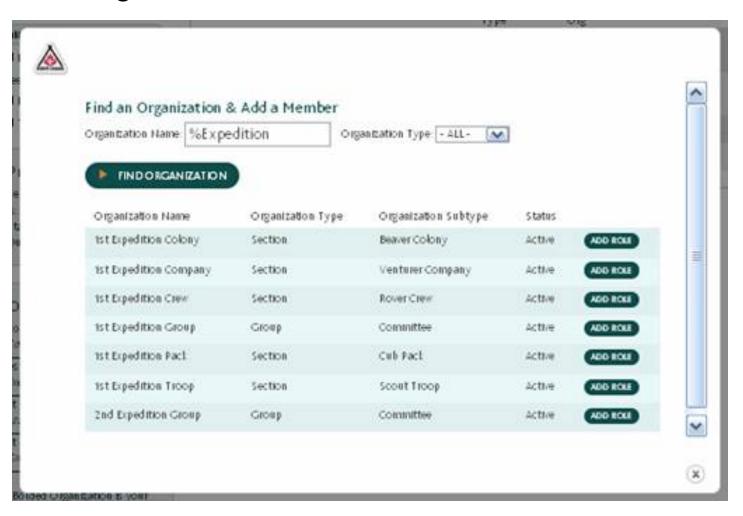
### Search for an organization:







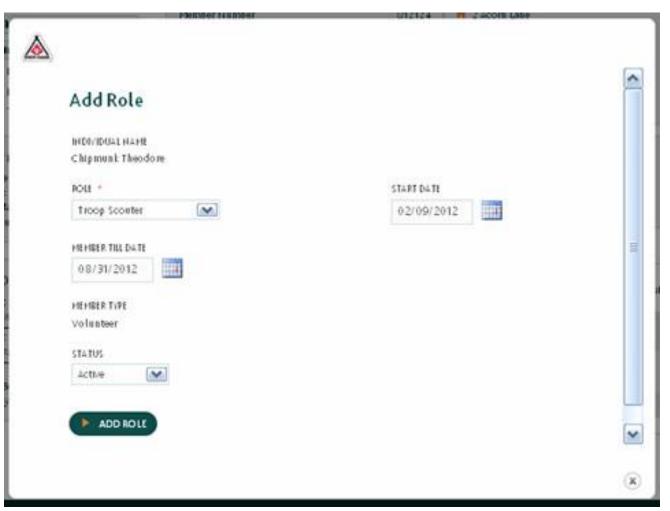
Select the organization where the record is to be added:







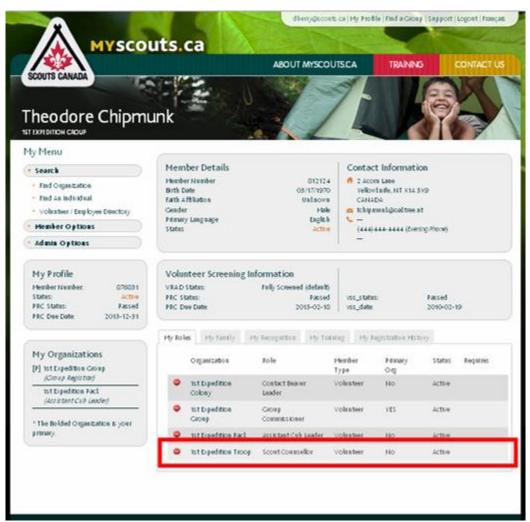
#### Enter the member role record:







#### View the new member role record:

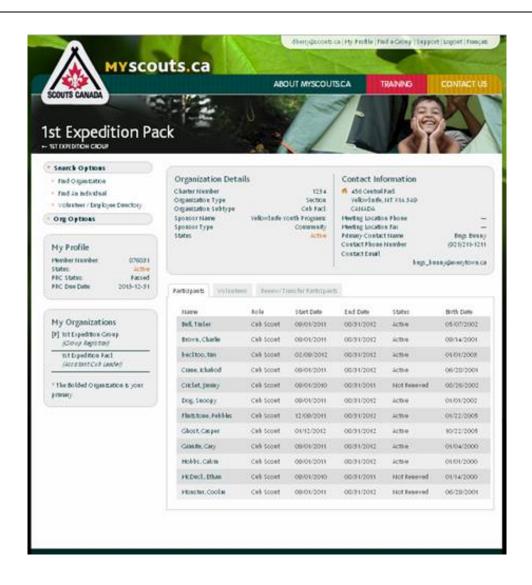




- A Registrar can add an active volunteer to an organization whenever a volunteer takes on a new or additional role.
- The Registrar can affect records only within their administrative hierarchy.











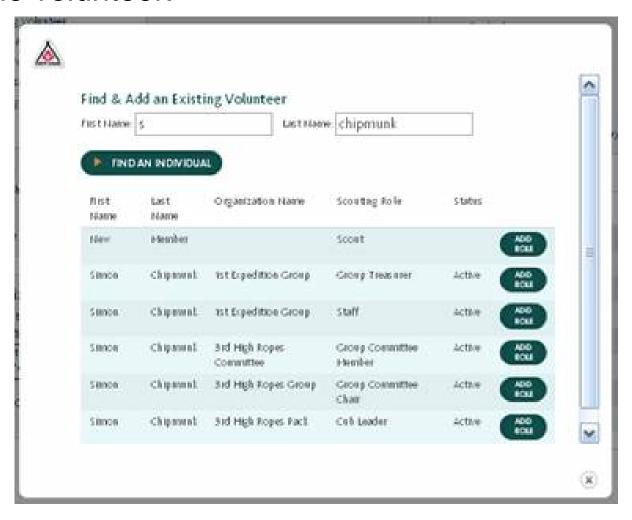
#### Search for the volunteer:







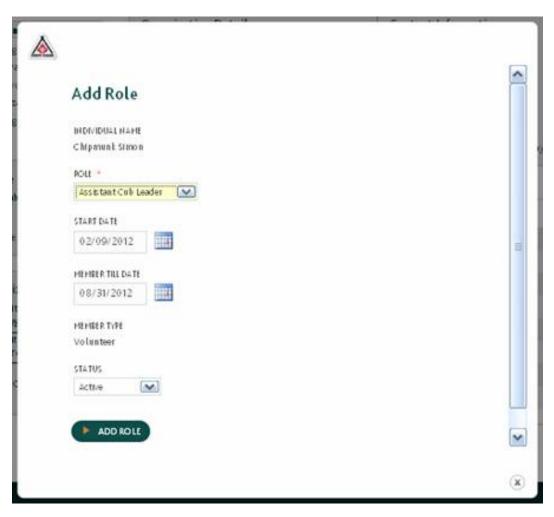
#### Select the volunteer:







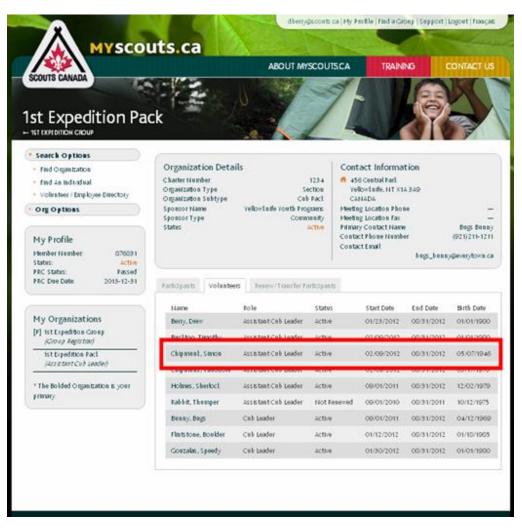
#### Enter the member role record:







View the new member role record:

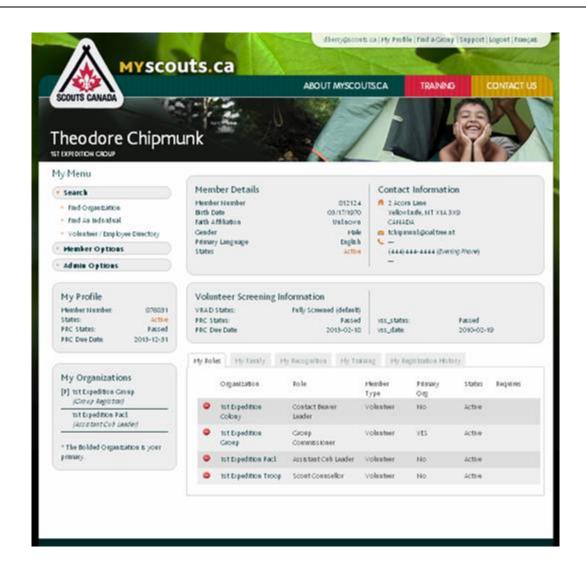




- Member role records are removed when the member will no longer perform the role.
- The Registrar can remove a member role record when required, at any time throughout the year.
- The Registrar can affect records only within their administrative hierarchy.



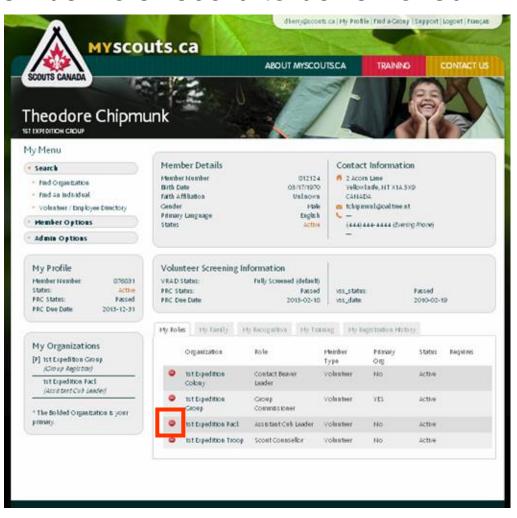








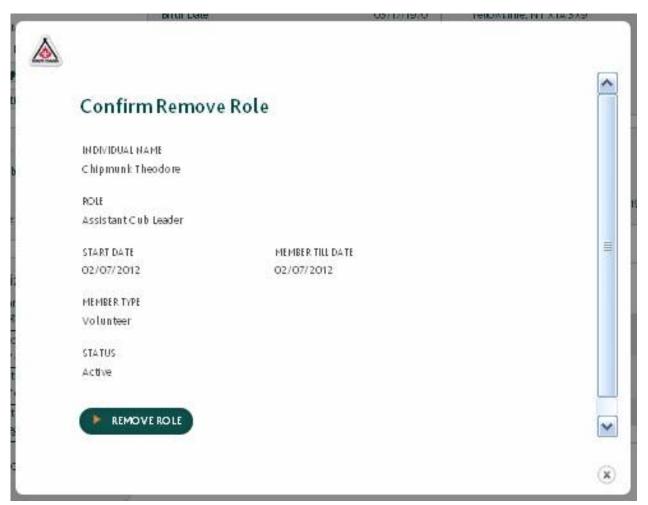
Select the member role record to be removed:







#### Confirm the member role record to be removed:





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# Module 9 Update a Member Profile

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### **Update a Member Profile**

### View/Edit a Member Profile

- Contact Information
- Emergency Information
- Medical Information
- Photo Release, Fundraising Release, Scouting Life Subscription, and Volunteer/Employee Directory Option
- Parent/Guardian Involvement



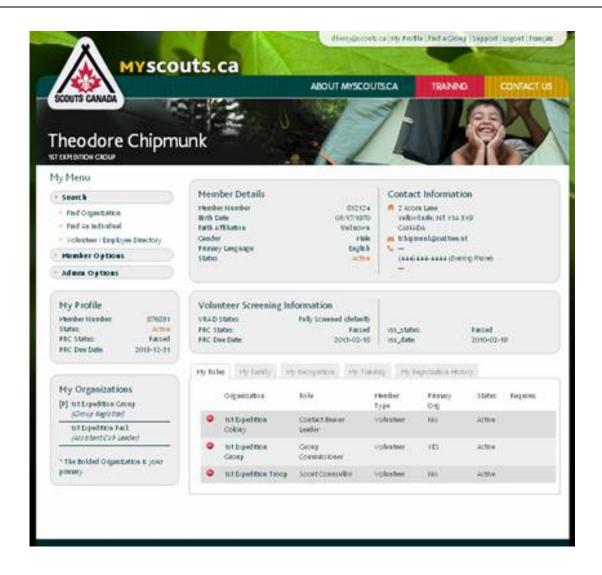
### **Update a Member Profile**

- Registrars can update information in member profiles for members within their administrative hierarchy.
- Volunteers and employees can view/edit their own member profile and the member profile content of their family member(s) at any time.
- Parents/guardians who have an account can view/edit their member profile content and the member profile content of their children/charges.
- Participants 18 years of age and over who have an account can update their own member profile content.
- Member profiles can be viewed/edited at any time.





### Update a Member Profile View/Edit a Member Profile







### Update a Member Profile View/Edit a Member Profile

#### Access a family member profile:

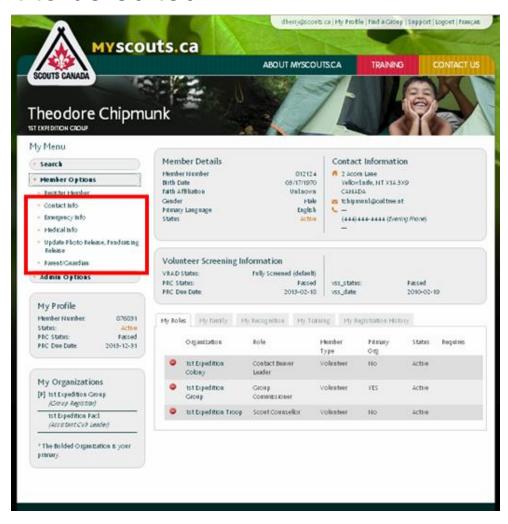






### **Update a Member Profile** View/Edit a Member Profile

#### Select content to be edited:







# **Update a Member Profile Contact Information**

Edit Contact Information	
Member Information	
PREFIX	The state of the s
M	
LAST HAND	4
Chipmunt	
FIRST HAPE *	
Theodore	
HIDDE NAME	
NETHANE	
CENDER	
Male M	
DATE OF BIRTH	~
	(x)





# **Update a Member Profile Emergency Information**

Edit Emergency Information	ĺ
Emergency Contact #1	
LAST NAME	
FIRST NAME	
DAY TIME PHONE	
EVENING PHONE	
OTHERPHONE	
RELATION SHIP	
Darmite ion To 0 in Lyouth 116 From Machine/Activity	5
	6





# **Update a Member Profile Medical Information**

Edit Medical Information	
Other Medical Information	
PROVINCIAL HEALTHCAPE NUMBER	重
PHYSICIAN HAME	
PHYSICIAN PHONE NUMBER	
DO VOU HAVE INSURANCE? * Not Selected	
INSURANCE DETAILS	
ALLERCIES *	<b>M</b>
	(x)





# **Update a Member Profile Photo Release, Fundraising Release, Scouting Life Subscription, and Volunteer/Employee Directory**







#### **Update a Member Profile Parent/Guardian Involvement**

Volunteer Informat	tion	
Parent/Guardian Invol	lvement:	
Full-Time Leader/Parent Vol	unteer Communications	
ind_prt_env_nature_lore_fla	g_ext Part-Time Leader / Parent Volunteer	
Organization & Planning	O wildoor Activities	
Committee Administration	Cooling, Banquets	
Singing, Music	Resource Person	
Drawing, Art	☐ sports	
Camp Helper	Deama Stats Play Acting	
□ Woodworking	Phoning	
Games	Science/Engineering Activities	



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#### Module 10 Volunteer Screening

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#### **Volunteer Screening**

- Record Interview and Reference Check Information
- Record Information in the Volunteer Screening Checklist
- Record PRC and VSS Dates and Statuses
- Approve New Volunteers and Returning Volunteers with New PRC/VSS
- Approve Returning Volunteers with Full Screening



#### **Volunteer Screening**

- Before working with youth, Scouts Canada requires that volunteers go through a screening process comprised of:
  - Interview
  - Three Reference Checks
  - Police Records Check (18 years of age and older)
  - Vulnerable Sector Screening (18 years of age and older)
- When an applicant applies to be a volunteer, they are entered with a status of **Pending**; this remains their status until all aspects of the screening process are complete and passed.



#### **Volunteer Screening**

- When the applicant is entered into myscouts.ca, a confirmation email is sent to them to thank them for their application and inform them of the screening process; a notification email is sent to the Group and Council Commissioners indicating that the individual has applied to be a volunteer and that the screening process must occur to activate them.
- Volunteers must be approved each session year; the PRC and VSS are required every three years.

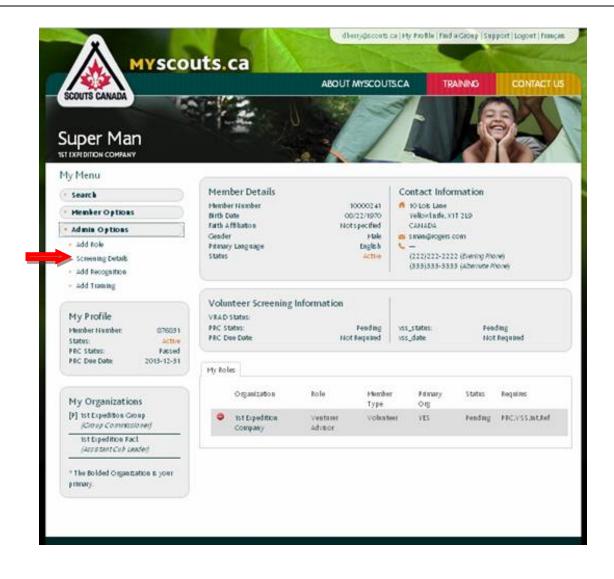


- Interviews are performed by the appropriate organization Commissioner (see Volunteer Screening Standard Operating Procedure) and a second volunteer; reference checks are performed by the Commissioner (or designate).
- The resulting interview and reference check information is entered into **myscouts.ca** by the Commissioner (or designate).
- Reference checks are performed and documented after the interview.
- The Commissioner (or designate) can only access records within their administrative hierarchy.

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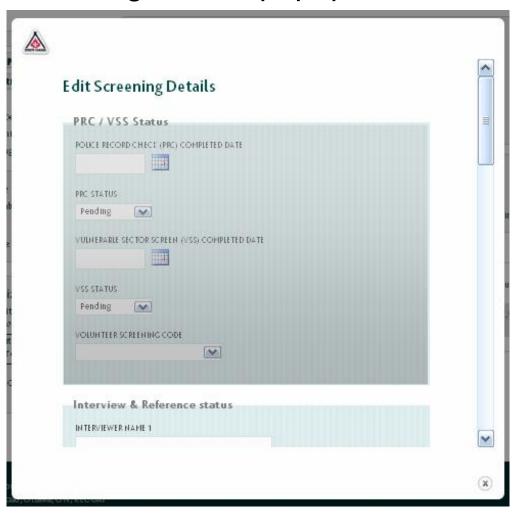








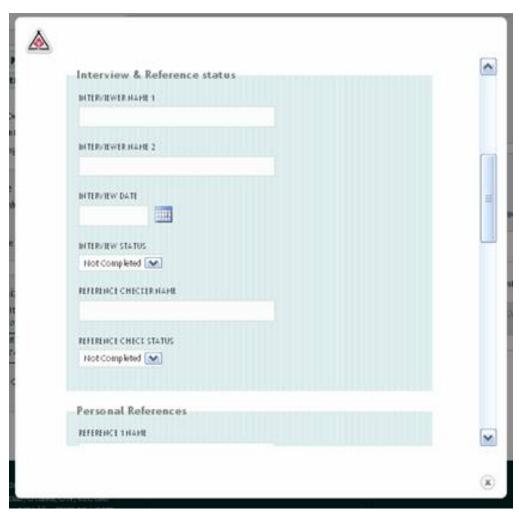
Access Edit Screening Details popup window content:







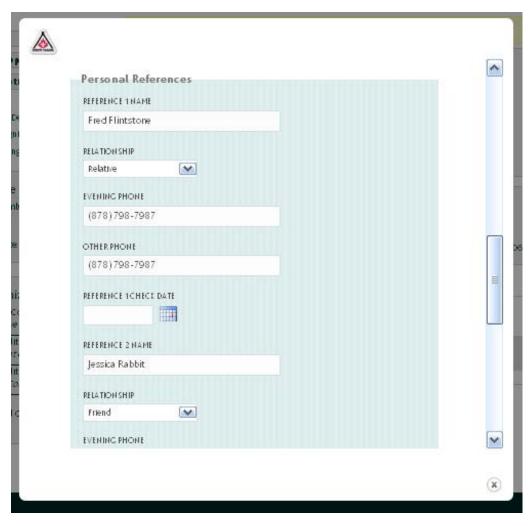
#### Enter interview and reference status:







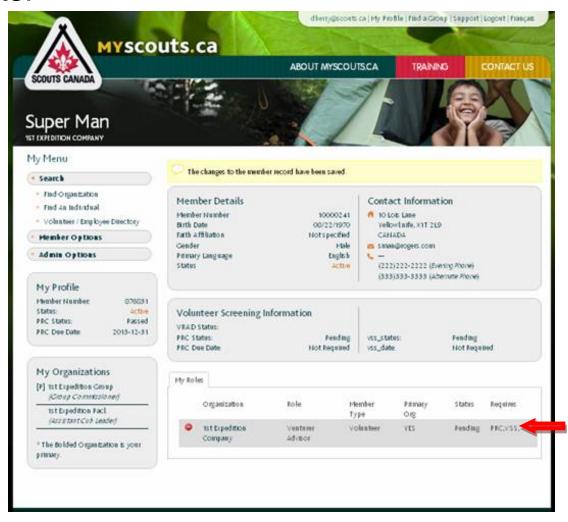
#### Enter reference information:







#### View results:





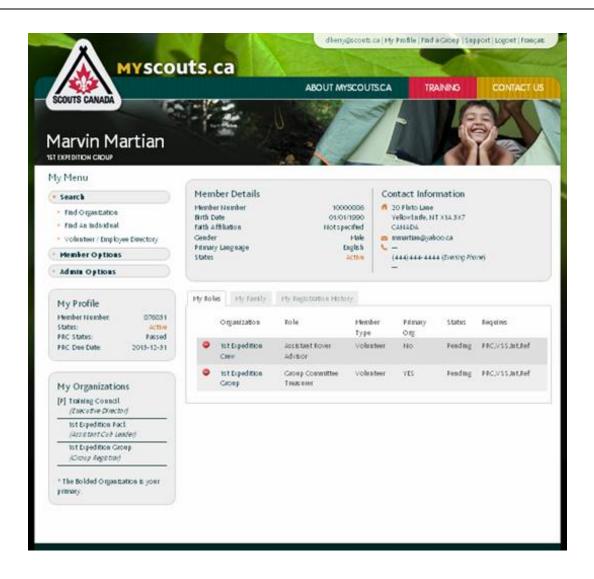
# Volunteer Screening Record Information in the Volunteer Screening Checklist

- The Volunteer Screening Checklist is used to record information collected for each volunteer applicant during the screening process.
- Information is recorded and/or viewed in the Volunteer
   Screening Checklist by the Commissioner (or designate) and the Council Executive Director for volunteer applicants within their administrative hierarchy.
- Returning volunteers may or may not require an interview or new references.
- The Volunteer Screening Checklist is available throughout the session year; information for a volunteer applicant can be added/edited/viewed until the volunteer applicant is given final approval by the Council Executive Director.





### Volunteer Screening Record Information in the Volunteer Screening Checklist

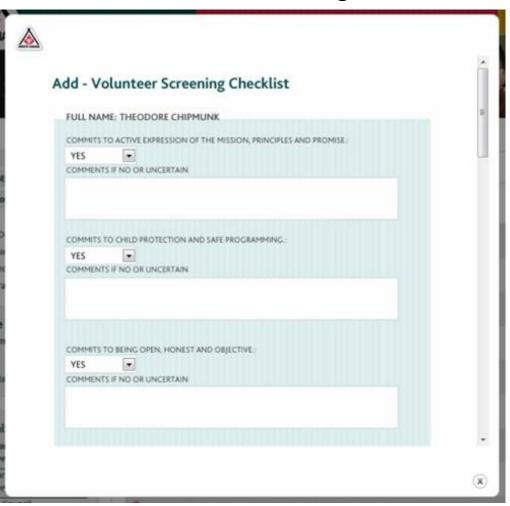






# Volunteer Screening Record Information in the Volunteer Screening Checklist

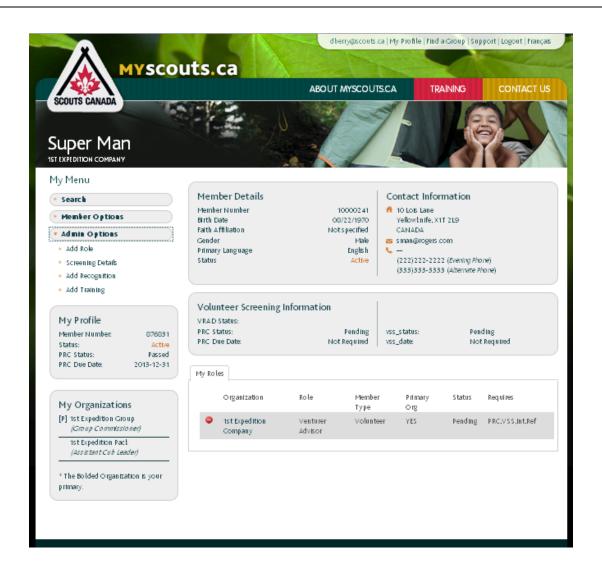
#### Enter data in the Volunteer Screening Checklist:



- For volunteer applicants 18 years of age and over, the Council Executive Director ensures that the Police Records Check (PRC) and Vulnerable Sector Screening (VSS) are complete and approved.
- The Council Executive Director (or designate) enters the PRC and VSS dates and statuses into **myscouts.ca**.



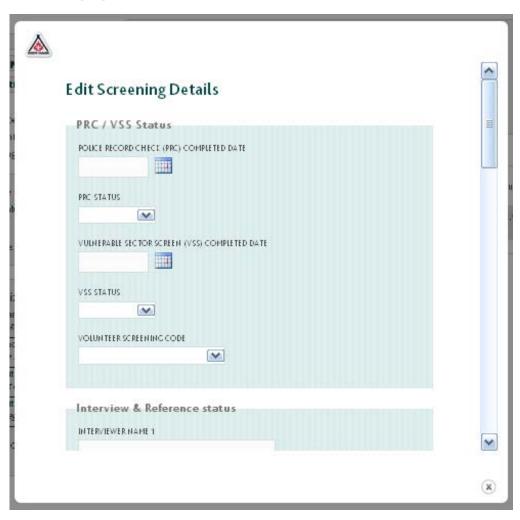








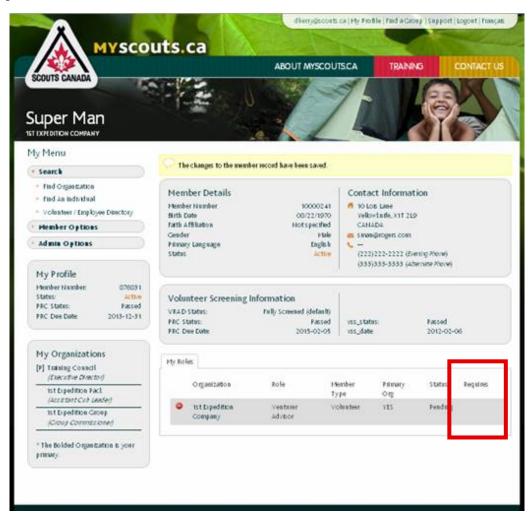
#### Enter PRC and VSS dates and statuses:







#### View results:

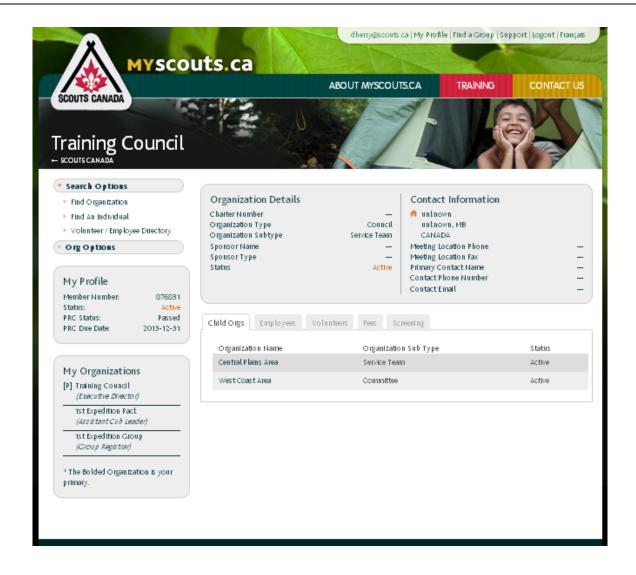




- The Council Executive Director (CED) or designate must provide final approval of new volunteer applicants by confirming that the screening process is complete
- The CED or designate must also provide approval of returning members who require a new PRC/VSS.
- When the screening process is complete, a returning volunteer/successful volunteer applicant can be approved.
- To approve a new volunteer or returning volunteer with new PRC/VSS, the CED (or designate) changes the volunteer's member status to **Active** (if the volunteer is not approved, the volunteer's member status is set to **Decline Service**) – this constitutes confirmation that the screening process has been completed and records the user's electronic signature and date.
- This task applies to new volunteers, and returning volunteers with a new PRC/VSS approval.



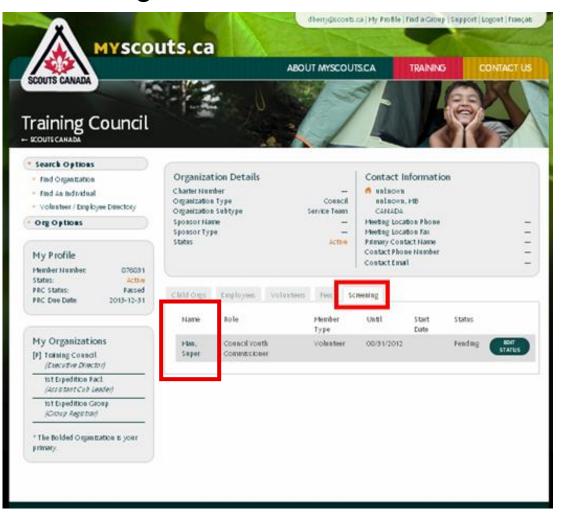








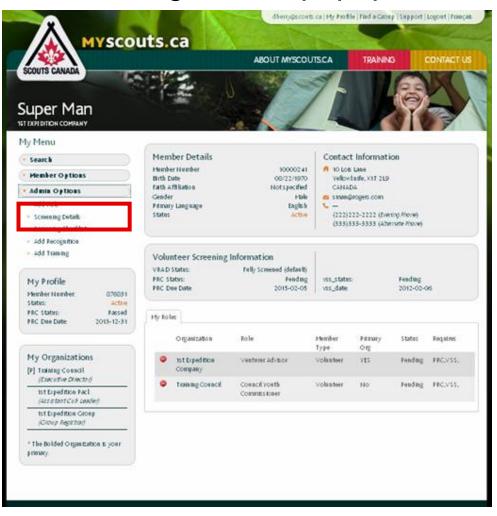
Access the Screening tab and select a volunteer to approve:







Access the Edit Screening Details popup window:







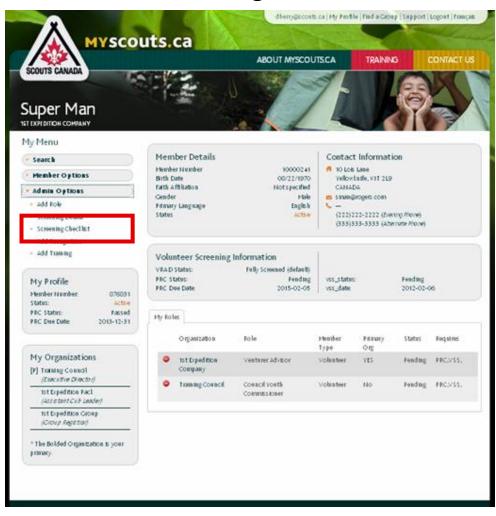
View Edit Screening Details popup window content:







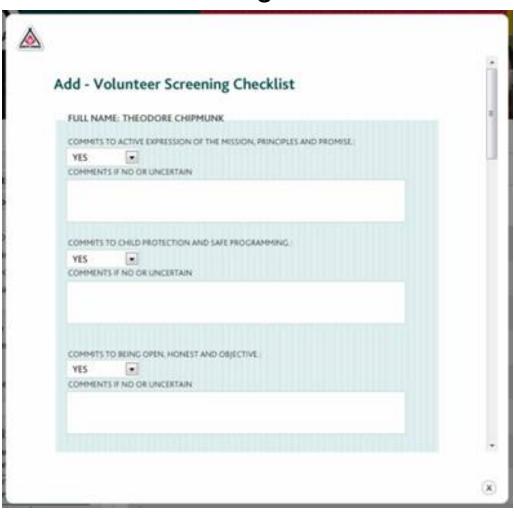
#### Access the Volunteer Screening Checklist:







View Add - Volunteer Screening Checklist content:







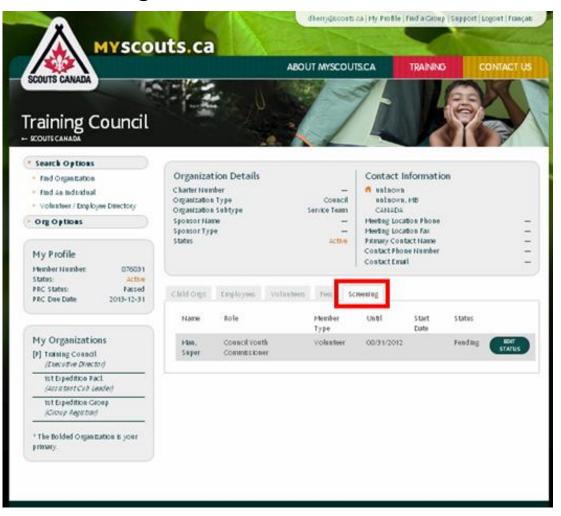
#### Access the Council-level organization:







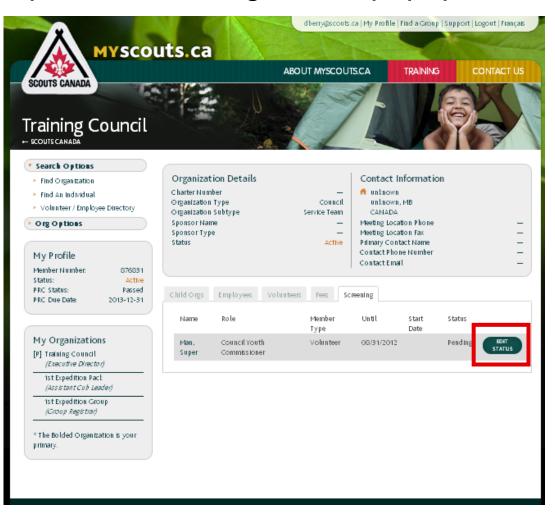
#### Access the Screening tab:







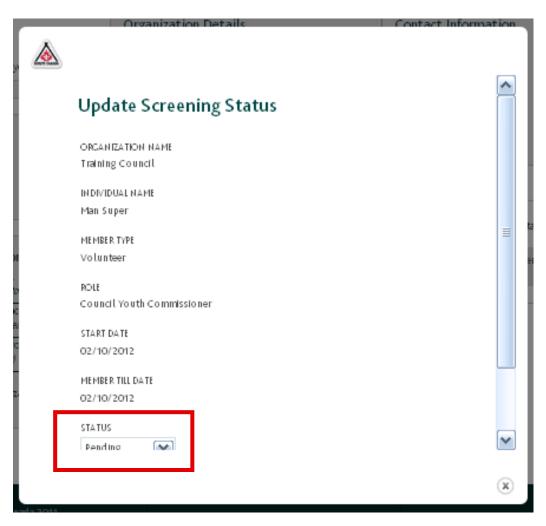
Access the Update Screening Status popup window:







#### Set the Status:

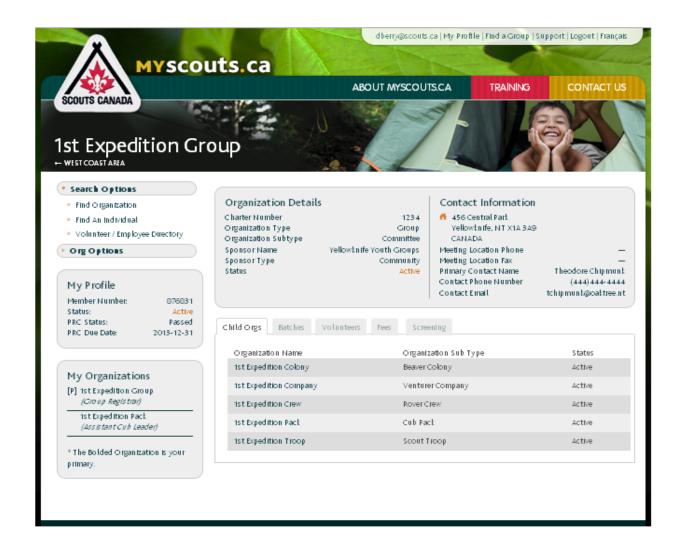




- To approve a returning volunteer with fully approved screening, the Commissioner or designate of the parent organization changes the volunteer's member status to **Active** (if the volunteer is not chosen for approval, the volunteer's member status is set to **Decline Service**).
- This constitutes confirmation that the screening process has been completed and records the user's electronic signature and date.



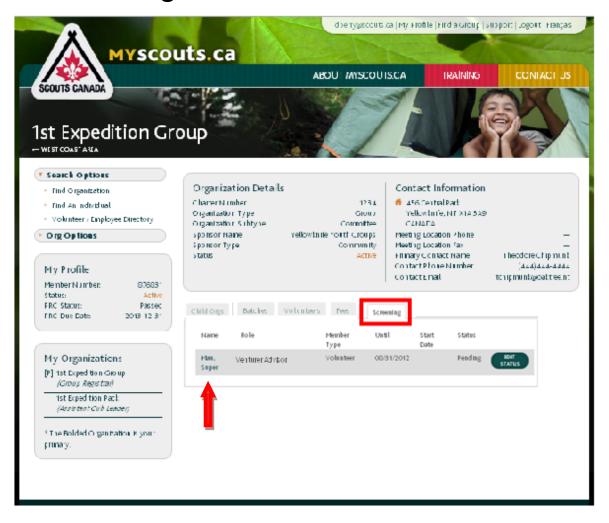








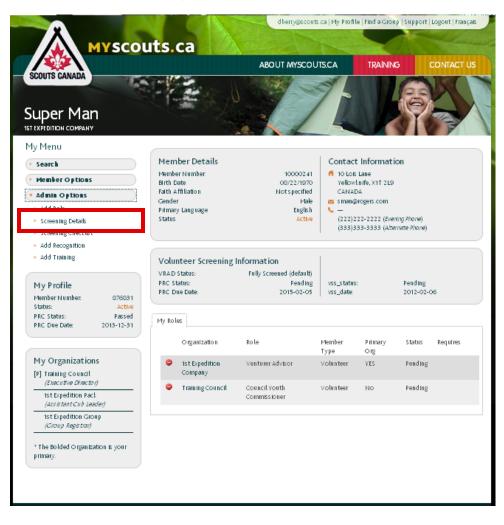
Access the Screening tab and select a volunteer to approve:







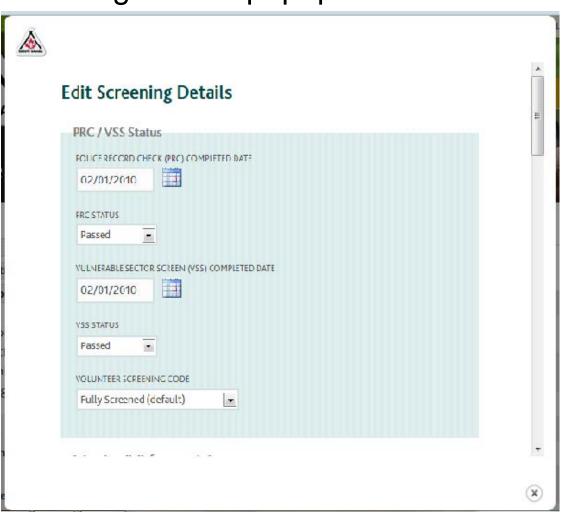
#### Access the Edit Screening Details popup window:







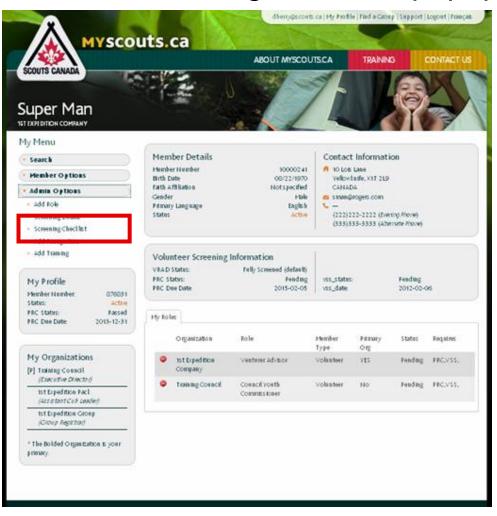
View Edit Screening Details popup window content:







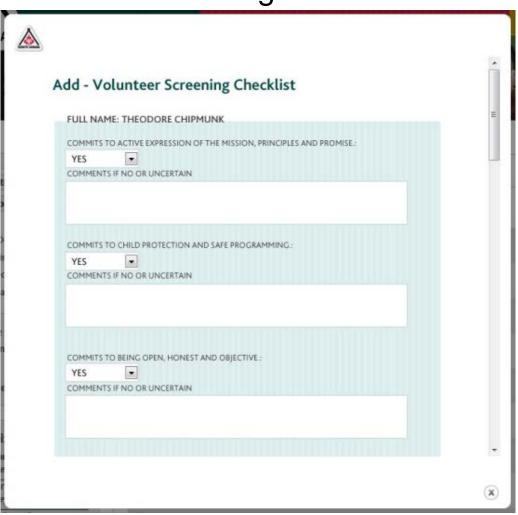
Access the Volunteer Screening Checklist popup window:







View Add - Volunteer Screening Checklist content:







# Volunteer Screening Approve Returning Volunteers with Full Screening

Access the organization where approval of the volunteer is required:

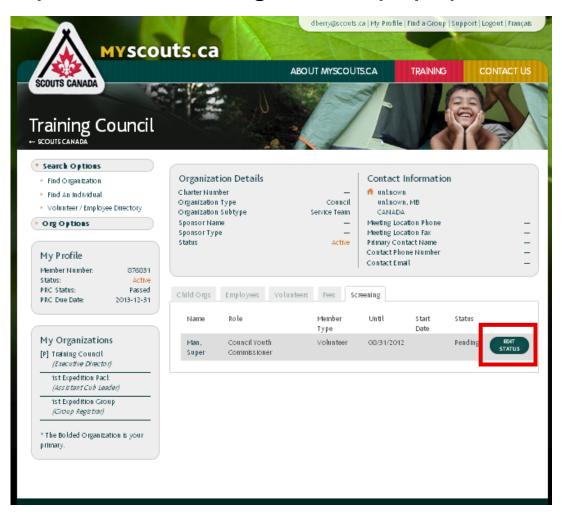






# Volunteer Screening Approve Returning Volunteers with Full Screening

Access the Update Screening Status popup window:

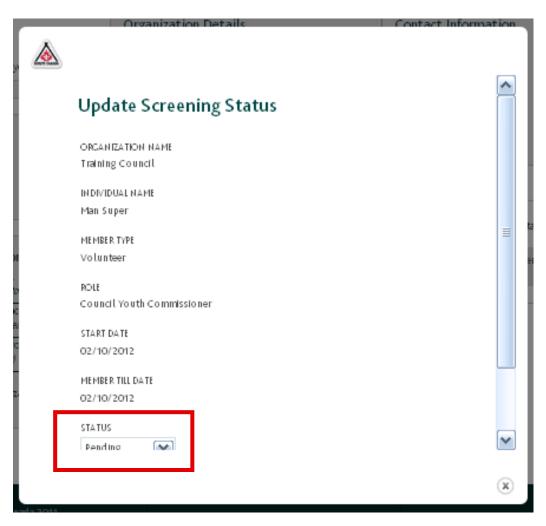






# Volunteer Screening Approve Returning Volunteers with Full Screening

### Set the Status:





### myscouts.ca

# Module 11 Process Registration Financial Transactions

User Training Release 1.0 February 2012

- Enter Subsidies/Discounts and Close a Batch
- Reconcile Registration Fees





- A registration invoice is created when a member is registered; a batch is comprised of a group of registration invoices.
- Upon entry of the first member registration, myscouts.ca opens a new batch and subsequent registration invoices accumulate in the batch (see Batch Standard Operating Procedure).
- Group-level, Council-level, and National-level fees are applied to each registration received.
- The Registrar closes the batch and, once subsidy approvals are received, enters subsidies and discounts.

# Process Registration Financial Transactions

- When a batch is closed at the Group level and all subsidies and discounts are entered, the Group sends a cheque and the paperwork to the Council.
- The cheque amount equals the batch total, minus the group fees, minus the subsidies, and minus the discounts.
- Payments are sent from the Group to the Council (according to Council instructions).
- The Council reconciles this payment with their records and sends the balance owed to National.



- When registering, a parent/guardian of a participant may inquire about a subsidy; the Group makes the subsidy request to the Council on their behalf.
- Subsidies and discounts are applied to the batch; they are not tied to individual registrations.
- The Group Registrar closes all batches formed by Grouplevel registrations; the Council Registrar closes all batches formed by Council-level and Area-level registrations.
- Batches are closed and once subsidies approvals are received, subsides and discounts are entered.

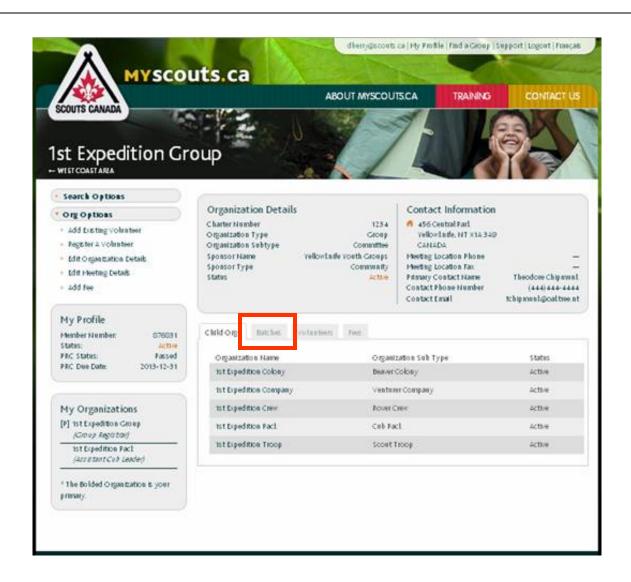


- Each Group or Council has only one batch open at a time

   invoices are added to the batch until the batch is
   closed; if no open batch exists, myscouts.ca opens a
   new batch when the next registration is saved.
- The Group Registrar enters Council and National subsidies and/or batch discounts applicable to the registrations in the batch.
- The National Finance Manager closes all batches formed by self registrations and National-level registrations.











### Access the required batch:







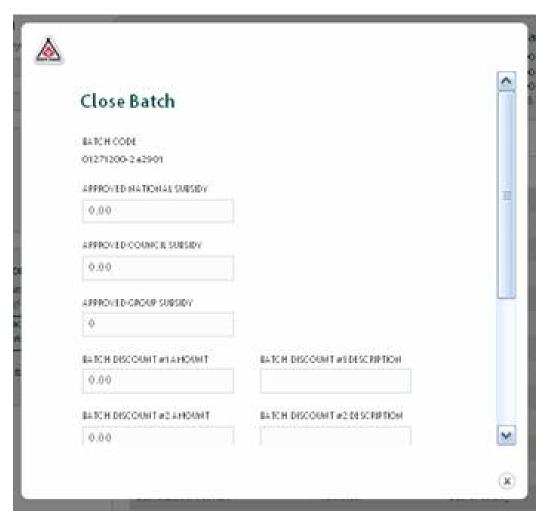
### View invoices:







### Enter subsidies/discounts:





# Process Registration Financial Transactions Reconcile Registration Fees

### **Group Level**

- When a batch is closed at the Group level, the Group sends a cheque to the Council (see Payment and Reconciliation Standard Operating Procedure).
- The cheque amount equals the (council fees + national fees) – (council subsidies + national subsidies).
- Payments are sent from the Group to the Council (according to Council instructions).
- The Council reconciles this payment with their records and sends the balance owed to National.



# Process Registration Financial Transactions Reconcile Registration Fees

#### **Council Level**

- When a batch is closed at the Council level, the Council sends a cheque to National.
- The cheque amount equals the National fees and minus National subsidies.
- Payments should be sent from Council to National monthly.



# Process Registration Financial Transactions Reconcile Registration Fees

#### **National Level**

- The National Finance Manager closes all batches formed by self registrations and National-level registrations.
- When a batch is closed at the National level, an electronic funds transfer (EFT) occurs; the total fees collected for each level are transferred directly into Group and Council bank accounts.
- EFT is an automated process; funds should be received by the Group and Council bank accounts no more than five business days after the daily National batch closes.



### myscouts.ca

# Module 12 Access Recognition/Training/Registration History Records

User Training Release 1.0 February 2012

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# Access Recognition/Training/ Registration History Records

- View Recognition Records
- View Training Records
- View Registration History Records
- Add Recognition Records
- Add Training Records

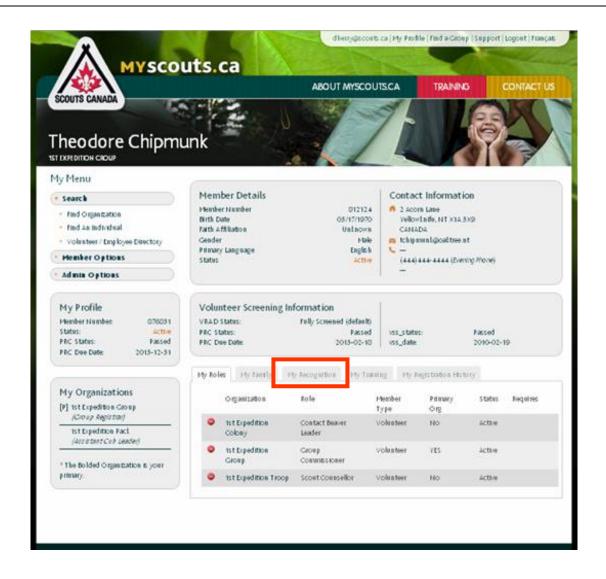


### Access Recognition/Training/ Registration History Records

- Employees and volunteers can view recognition, training, and registration history records for members within their administrative hierarchy, at any time throughout the year.
- Select volunteers and employees who have administrative rights can add recognition and training records for members within their administrative hierarchy, at any time throughout the year.
- Parents/guardians can view the recognition, training, and registration history records for their children/charges; volunteers and participants 18 years of age and over who are not registered under a parent or guardian can view their own recognition, training, and registration history records.

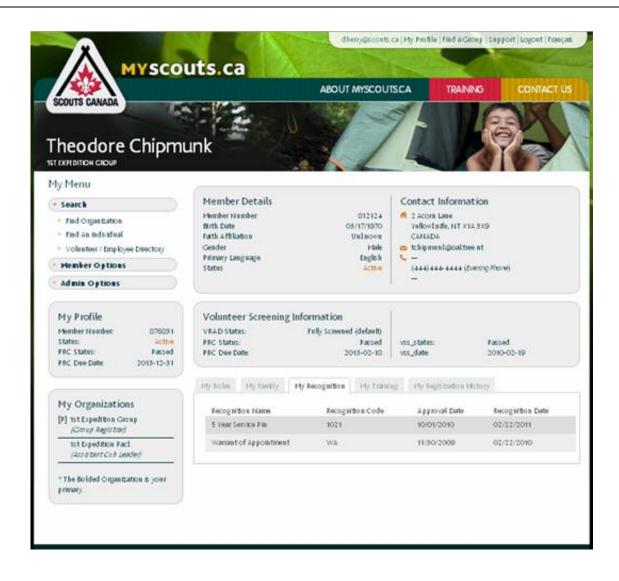






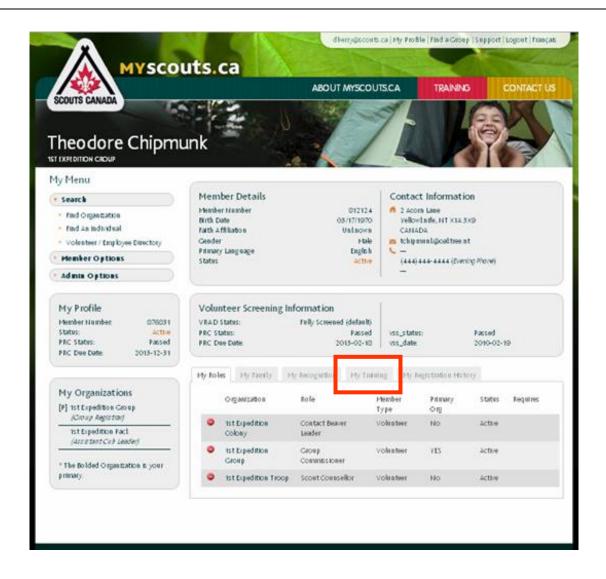






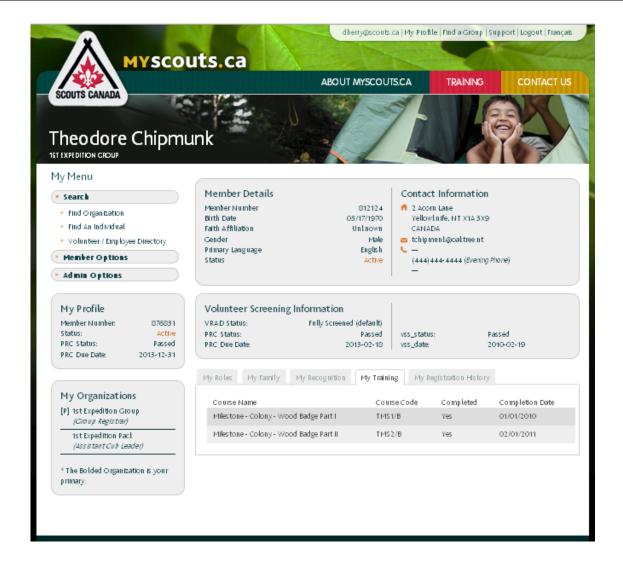








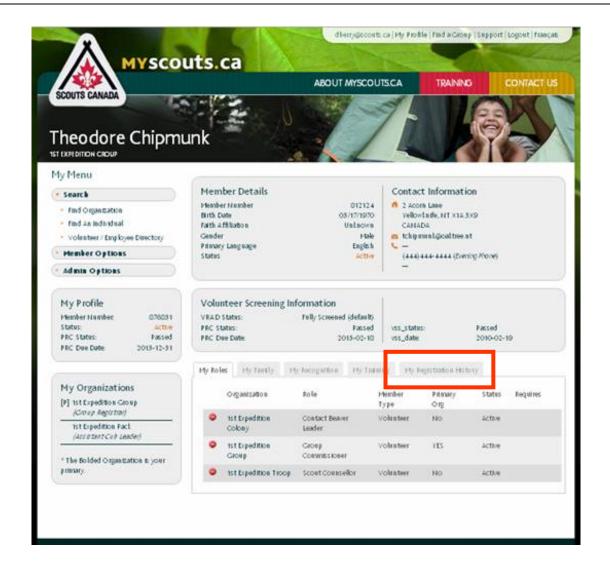








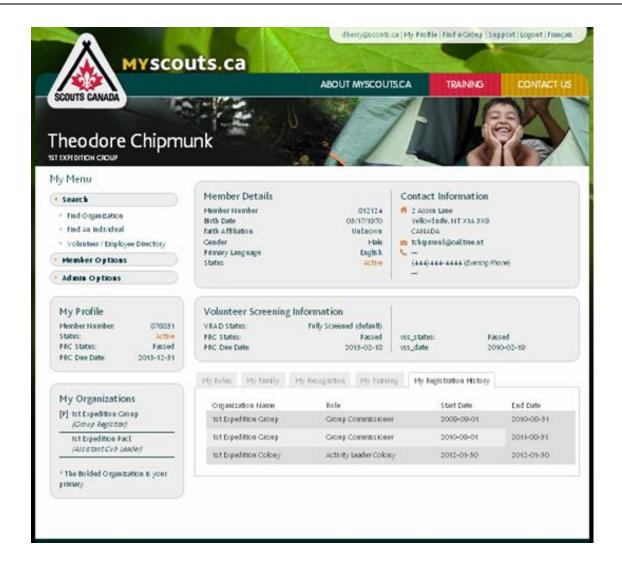
### Access Recognition/Training/ Registration History Records View Registration History Records





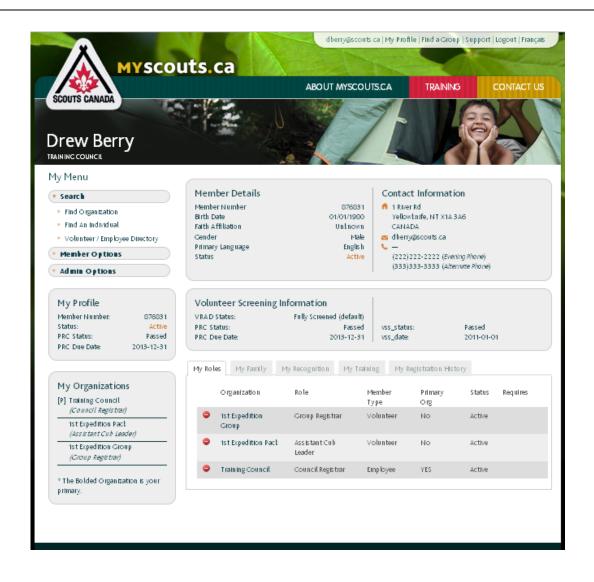


### Access Recognition/Training/ Registration History Records View Registration History Records





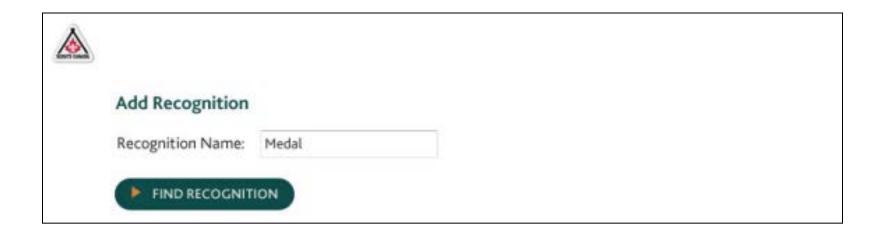








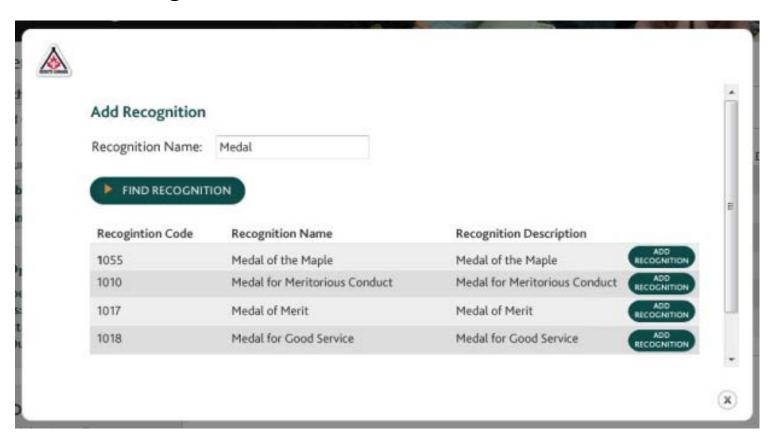
Search for the required recognition:







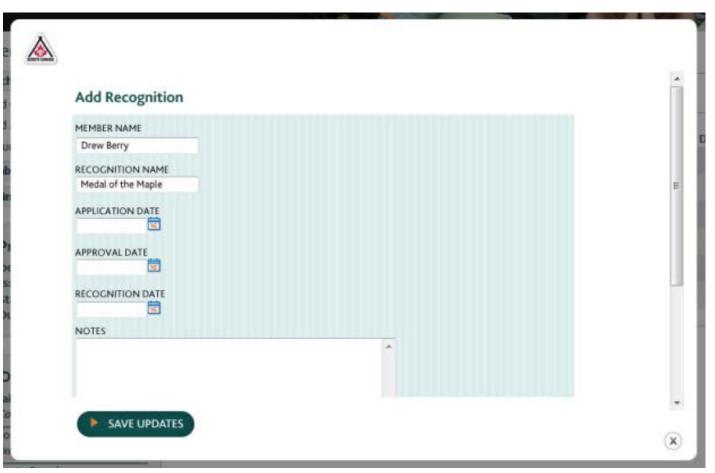
Select the recognition to be added:





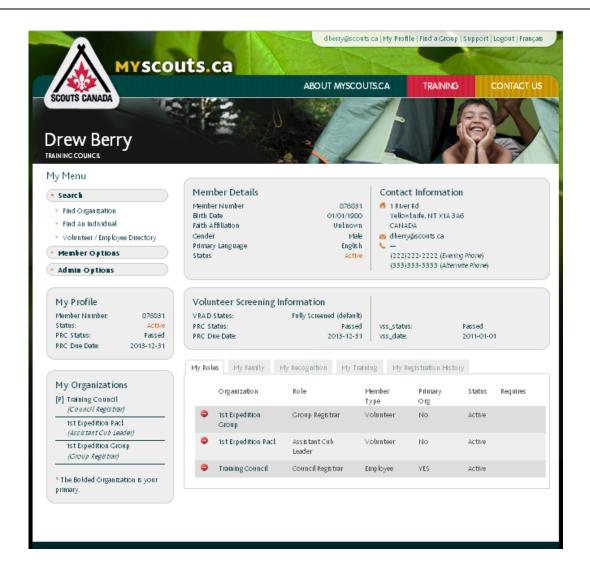


### Add the recognition record:













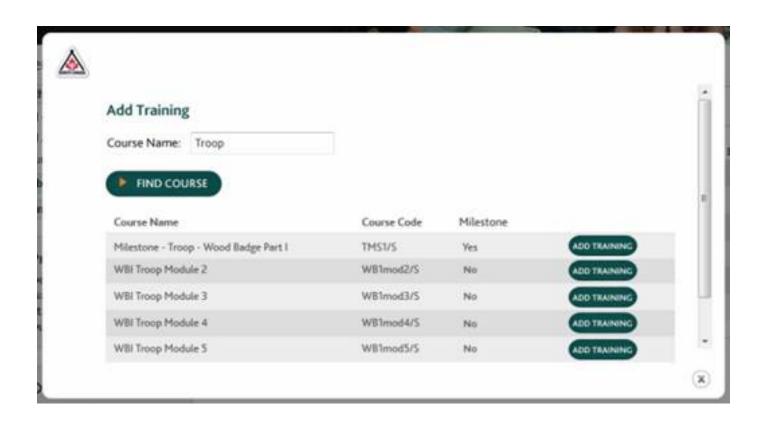
Search for the required course:







Select the course to be added:







### Add the training record:

