**Forms Automation**



**New Youth Process**

**V1**

Contents

[2 Main changes 2](#_Toc16764048)

[3 Process Overview 2](#_Toc16764049)

[4 Applicant who hasn’t visited a group 2](#_Toc16764050)

[4.1 Region Office Manager 2](#_Toc16764051)

[4.2 Group Leader 2](#_Toc16764052)

[5 Applicant who has visited a group 3](#_Toc16764053)

[5.1 Region Office Manager 3](#_Toc16764054)

[5.2 Group Leader 3](#_Toc16764055)

# Main changes

The applicant will be automatically registered on ScoutLink.

The Group Leader will have to go to **ScoutLink** to approve the applicant. This is mandatory to start the provisional (trial) period.

The applicant will have a CareMonkey account during the provisional (trial) period.

The endorsement will be done on **ScoutLink** and will be the last part of the process**.**

Periodic reminder emails will be sent when there are applicants awaiting approval or endorsement.

# Process overview

The new process will allow applicants to be automatically registered on ScoutLink without human intervention, saving Group Leaders time. It will also allow provisional (trial) members to be registered on CareMonkey which will give Scouts NSW access to any medical condition that might be relevant for external activities.

The invoice process will remain the same. Every quarter, an invoice will be generated for each member. Provisional (trial) members will not enter the invoice process.

If the Region Office Manager receives an email that was supposed to go to the Group Leader, it means that there is no Group Leader for the Group.

# Applicant who hasn’t visited a group

The following process will occur if a prospective youth applicant (or their parent) wishing to join Scouts who **HAS NOT**visited and/or engaged with any Scout group uses the Y1 form online to apply to become a member of Scouts.

## Region Office Manager (ROM)

* + - The ROM will receive an email to inform them that an applicant who **HAS NOT** visited the group has submitted the form. No action is required.

## Group Leader

* + - The Group Leader will receive an email to inform them that an applicant who **HAS NOT** visited the group has submitted the form.
		- The Group Leader should contact the applicant to schedule a visit with the family. After this visit, one of two outcomes will occur:
			* The applicant may not continue with the process and no further action is required.
			* The applicant will continue with the process, in which case they must fill out the form on the Scouts website.

# Applicant who has visited a Group

The following process will occur when a prospective youth applicant (or their parent) wishing to join Scouts **HAS** visited a Group of their choice and then uses the Y1 form online to apply to become Scout member at this specific Group.

## Regional Office Manager

* + - The ROM will receive an email to inform them that an applicant who **has** visited the group has submitted the form.
		- The ROM will receive an email from ScoutLink to inform them that a provisional (trial) member has become a full member once their membership has been approved by the Group Leader.

## Group Leader

* + - The Group Leader will receive an email to inform them that an applicant who **has** visited the group has submitted the form.
		- The applicant will be automatically registered on ScoutLink as “Awaiting Approval”
* The provisional period **will not** **start** at this moment.
* The applicant won’t be allowed to participate in any activity or event.

	+ - Periodic emails will be sent to the Group Leader to remind them that there are applicants waiting for approval.
* If the applicant remains as “Awaiting Approval” for three months, the applicant will be **automatically** resigned on ScoutLink. If they want to renew their application, they will have to re-apply using the online form.

	+ - The Group Leader needs to go to **ScoutLink** **to approve or reject** the applicant.
* Once approved, the (provisional) trial period will start.
	+ A CareMonkey account will be created for the applicant (as long as their Group is on CareMonkey). NB: Groups not using CareMonkey will need to direct the applicant to the E1 form.
	+ Applicant’s status will be changed from “Awaiting Approval” to “Provisional Member” on ScoutLink.
	+ **The trial period must not exceed three months.**
		- If the trial period exceeds three months, the applicant will be automatically resigned and won’t be able to participate in any activity or event.
		- The applicant will have to submit a new form to become a provisional (trial) member again.
* If rejected, the applicant will be resigned on ScoutLink.
	+ The applicant will have to submit a new form to become a provisional (trial) member again.
		- The Group Leader must go to ScoutLink to **endorse** or **resign** the applicant.
* Periodic emails will be sent to the Group Leader to remind them that the trial period is about to end.
* If the trial period exceeds three months, the applicant will be automatically resigned and won’t be able to participate in any activity or event.
	+ The applicant will have to submit a new form to become a provisional (trial) member again.
* Once endorsed, the provisional (trial) member will become a full member.
	+ The new member will enter the invoice’s membership process.
	+ An invoice will be generated every quarter.
	+ The member’s status will be changed from “Provisional Member” to “Registered” on ScoutLink.
* If resigned, the applicant will be resigned on ScoutLink.
	+ The applicant will have to submit a new form to become a provisional (trial) member again.