



How to guide for:

Managing Administration Forms in Operoo.

- What Does This Cover
- Background
- Staff or Self-Service Forms Versus Public Forms
- Scouts ACT's Public Forms
- Scouts ACT's Staff Forms
- Accessing Forms
- Printing Copies Of Completed Forms
- Tracking Progress Of Forms

What does this cover

This guide explains how to use Scouts ACT's internal administration and activity management forms in Operoo.

Operoo forms are designed for a number of scenarios. Broadly, some forms are pushed to users and some are 'self-service' for users to complete at any time.

Different types of forms behave differently to each other. The full menu of forms is explained simply in this guide sheet.

Background

- Scouts ACT is using Operoo to manage Activity Approvals and Activity Consents including associated dynamic records to support our management of the health and wellbeing of youth and adult members (eg, medical information).
- Scouts ACT is also using Operoo to manage its business processes (so-called Admin Forms).
- Now that Operoo has been successfully commissioned, Scouts ACT does not allow the use of alternative systems or processes. Old forms, and group-developed forms and processes are not permitted.
- Consolidating forms into a single platform delivers significant improvements to processing time, accuracy and consistency, and ensures secure, long-term retention of data for the whole organisation.
- Operoo is designed primarily as a mechanism to manage school excursions and permissions (which translates nicely to Scouting Activities). Scouts ACT has pushed Operoo a bit further than it is designed for by building its full forms requirement into the platform. Accordingly, we must be pragmatic and tolerant of the fact that Operoo does not always deliver exactly the workflow or functionality that we want. Nevertheless, the benefits outweigh the slight disadvantages.
- Different forms can be made available to (or withheld from) different users, depending upon their role.
- It is not possible for an Approver of a form to see copies of forms they have approved. This is an unfortunate design-limitation in Operoo. Scouts ACT has raised this as an important improvement for Operoo to consider. To work around this:
 - approvers can print the form or save it as PDF, but only **before** they approve it. See page 6;
 - the Branch Office can download a form with responses upon request if necessary (but this cannot be offered as a routine service as it will involve thousands of forms);
 - for a limited number of forms that have downstream steps (eg, Adult Membership Application), an email is generated containing the information needed, which is forwarded to the relevant person manually by the Office Team.

Staff or Self-Service Forms versus Public Forms

Most of Scouts ACT's forms are self-service forms available to people we designate as '**staff**'. All Leaders are staff. Staff forms are optional forms that are available to users with a log-in to complete at any time.

Public Forms are for people outside Scouting to use. Users don't need to have an Operoo account to complete Public Forms. Therefore we must email the **link** to the form to the person we want to fill in the form, or we must provide a button or link somewhere that is publicly accessible on our website.

The links to Public Forms must be stored OUTSIDE Operoo (eg, website). Most users (even staff) do not have access to Public Forms from within Operoo.

These are Scouts ACT's Public Forms

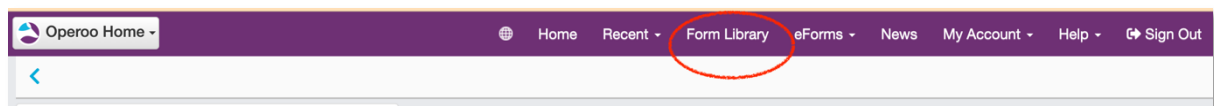
These forms are sent to people outside Scouting.

1. Adult Membership Application Form
2. Adult Membership Application Endorsement
3. Referee Report Form
4. Youth Membership Application Form
5. Application for Appointment as a Youth Helper
6. IAVP Phase 1

These are Scouts ACT's Staff Forms

The list of forms below is accurate at time of writing and is provided to show the general groupings by subject or function of our administration forms.

The current suite of forms (which may vary a little from the list below from time to time) is available in the Operoo Forms Library. <https://groups.operoo.com/forms>



Staff Forms are available on a self-service basis for members within Operoo.

We have around 50 forms for internal use. Approximately one-third are to manage HR and operational oversight of Scouting, and the remainder are specific forms to manage approval for adventurous activities.

1. HR and Administration Forms

Adult Leaders

See also (Public Form): Adult Membership Application
See also (Public Form): Adult Membership Endorsement
See also (Public Form): Referee Report
See also (Public Form): Individual Adult Volunteer Plan Phase 1

1. Adult Member Resignation
2. Application for Secondary Appointment
3. Adult Transfer
4. Leave of Absence Form 1 (3 months or less)
5. Leave of Absence Form 2 (3-6 months)
6. Leave of Absence Form 3 (6 months or more)

7. Adult Volunteer Performance Plan
8. Individual Adult Volunteer Plan (Phase 2)
9. Individual Adult Volunteer Plan (Phase 3)

Incident & Injury Management (including Property)

10. Incident Report (eg, accident without injury, behavioural incident, use of illegal substances)
11. Injury Report (physical injury)
12. Property Incident Report

Formation Management

13. Registration of a Rover Unit
14. Registration of Scout Group.
15. Registration of a Unit (formerly a Section).

Other

16. Acknowledgement of Data Privacy Responsibilities.
17. Scout Fund Application.

2. Activity Management

These are staff forms too.

There are specific Scout requirements defining who can provide advice about, or lead, Adventurous Activities. As Operoo is not designed for the significant complexity of Scout structure and management, it was necessary to create a separate AA Approval form for each type and level of activity to ensure that forms could be directed to specific reviewers and approvers with the appropriate qualifications.

Select the AA form that suits the activity you plan to run. This ensures that the form will be routed to the person or team qualified to review and/or approve the activity.

Activity Approval forms can be started, saved, and resumed later as the information is gathered. Once submitted you will be able to monitor the approval process.

You can monitor the approval process from your active forms dashboard once submitted.

Submit Form

Save for Later Submission

13th Canberra – accessible forms

18. 13th Canberra Adventurous Activity Approval (custom-purpose for use by 13th Canberra only)
19. 13th Canberra Activity Approval (custom-purpose for use by 13th Canberra only)

General out-of-hall activities

20. Activity Approval (for general activities, non-AA)

Bushwalking and survival

21. Adventurous Activity Approval Bushwalking Tracked Environments
22. Adventurous Activity Approval Bushwalking Difficult Tracked Environments
23. Adventurous Activity Approval Bushwalking Extremely Difficult/Untracked Environments
24. Adventurous Activity Approval Survival

Cycling

25. Adventurous Activity Approval Cycling On/Off Road (Basic)
26. Adventurous Activity Approval Cycling On Road (Advanced)
27. Adventurous Activity Approval Cycling Off Road (Advanced)

Alpine

28. Adventurous Activity Approval Snowboarding
29. Adventurous Activity Approval Downhill Skiing
30. Adventurous Activity Approval Snow Shoeing Day Tour
31. Adventurous Activity Approval Snow-shoeing Overnight Tour
32. Adventurous Activity Approval Cross Country Skiing Day Tour
33. Adventurous Activity Approval Cross Country Skiing Overnight Tour

Canoe and Kayak

34. Adventurous Activity Approval Canoe Flat and Undemanding Water
35. Adventurous Activity Approval Canoe Moving Water to Grade 2
36. Adventurous Activity Approval Kayak Flat and Undemanding Water
37. Adventurous Activity Approval Kayak Moving Water to Grade 2

Sailing

38. Adventurous Activity Approval Sailing

Rock

39. Adventurous Activity Approval Abseiling
40. Adventurous Activity Approval Caving
41. Adventurous Activity Approval Climbing

SCUBA & Snorkelling

42. Adventurous Activity Approval Scuba
43. Adventurous Activity Approval Snorkelling

Other

44. Adventurous Activity Approval 4WD
45. Adventurous Activity Approval Archery

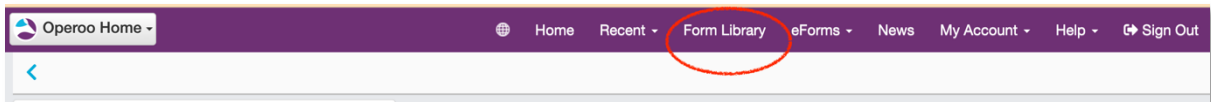
- 46. Adventurous Activity Approval
- 47. Adventurous Activity Approval

Pioneering
High Risk Activities not elsewhere specified

Accessing Forms

Staff Forms

Log in to Operoo and go to Form Library.



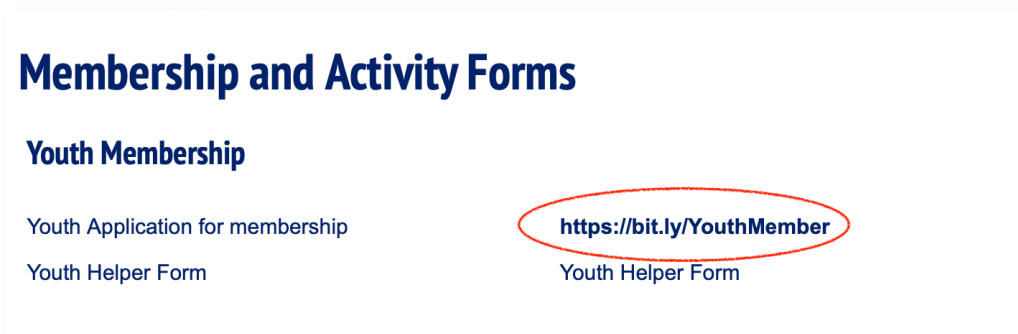
We have organised our forms into 4 broad categories. Scroll and select the form you need.

- Category 1: Activities General
- Category 2: Activities Medium Risk
- Category 3: Activities High Risk
- Category 4: Administration Forms

Public Forms

Log in to the Members' Area of the Scouts ACT website; go to Forms & Resources, then Membership and Activity Forms; locate the form you want; click the link to commence the form.

If you are sending the form to someone else to complete (eg, the parent of a new youth member), **copy** the link and send it to them in an appropriately worded email.



Printing copies of completed forms

Forms you are submitting

- If a Public form, you will be given the option to download a copy when you hit Submit.
- If a Staff form, **before you submit**, select Print.
 - Print, or save as a PDF. You can't save or print a copy once you have submitted the form.

Forms you are approving

- When a form is sent to you for approval, open the form
- **Before you approve it**, select Print.
 - Print, or save as a PDF. You can't save or print a copy once you have approved a form.
- The Branch Office team can download a PDF of a submitted form, but this should only be requested if absolutely necessary. The volume of forms is far too high for this to be offered as a standard service.

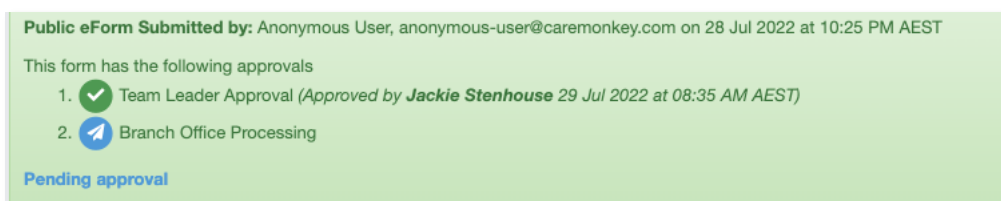
Tracking progress of forms

Forms you are submitting

- If a Staff form: you can access this form at any time in the Forms Library and view the stage of workflow approval or outcome (approved/rejected). If rejected, you have the option to resubmit the form with changes as required.
- If a Public form: you will get confirmation that your form has been submitted, and will hear from people who have downstream processing responsibilities if applicable.



Forms you are approving

- You will see the stage of workflow at the top of the form you have been asked to approve.



Public eForm Submitted by: Anonymous User, anonymous-user@caremonkey.com on 28 Jul 2022 at 10:25 PM AEST

This form has the following approvals

1.  Team Leader Approval (Approved by **Jackie Stenhouse** 29 Jul 2022 at 08:35 AM AEST)
2.  Branch Office Processing

Pending approval