



How to guide for: Collecting Group Fees in Operoo



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What Does This Cover

How groups can:

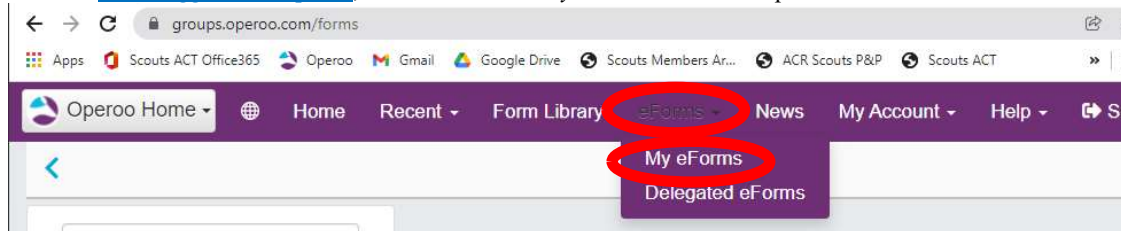
- Use a Consent form in Operoo to collect group fees from members and gauge interest for continuing with Scouting
- Manage discounts for individuals

Background Information

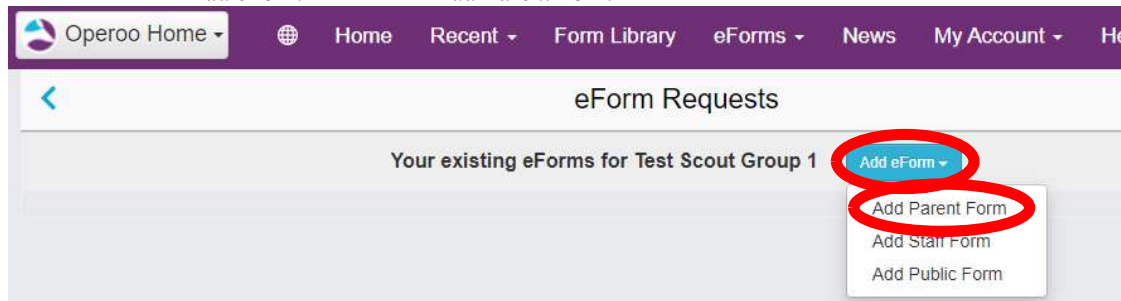
- Once a Consent form is enabled, a notification will be sent to families.
- Leaders can view acceptances/declines on their browser or the Operoo App (from the Apple Store or Android Play Store) and deactivate youth in Extranet accordingly.
- If viewing the form on a phone, the screen layout will differ slightly, but the same functionality exists.
- These instructions are tailored for fee collection. For more detailed instructions on using Activity Consent Forms, please refer to *Create Activity Consent Forms FAQ* on the Scouts ACT website (*Member Links* → *Operoo Guides*)
- Fees may be collected at a frequency that suits your group
- If there are further questions, please contact Accounts (02 6282 5211 or accounts@scoutsact.com.au) for assistance.

Creating a Fee Form

1. [Once logged into Operoo](#), select *eForms* → *My eForms* from the top-level menu



2. Click on *Add eForm* and choose '*Add Parent Form*'.



3. Click on *Start from a blank eForm* → *Custom Unsigned Form*

Add new Parent eForm

You are creating a new Parent eForm

> Duplicate one of your existing eForms

> Use one of your eForm templates

> Use an Operoo Best Practice Parent eForm Templates

> **Start from a blank eForm**

Event Form

Custom Unsigned Form

Custom Signed Form

A non-event form not requiring a signature

4. Give the form a brief title and explainer, then scroll to the bottom to add an *Acceptance* and a *Payment Request* to the form.

Title*

Test Fee Collection - Term 1 & 2 2024

Parent Form

A form for Student Contacts (e.g. parents or guardians), available for submissions

Reset Formatting B I U A Helvetica 14

Placeholders

Dear families,

We are collecting fees for <Scout Group name> for <period>. Total fees are \$<###>, which consists of:

- \$<###> Group Fees
- \$<###> Building Sinking Fund

Please contact <name> via <details> if you require assistance with completing this form, or if you would like to discuss alternative payment arrangements and what assistance is available.

Please respond by dd/mm/yyyy; if neither a response nor contact has been made at this date, we will take this to mean that your youth is no longer interested in continuing Scouting.

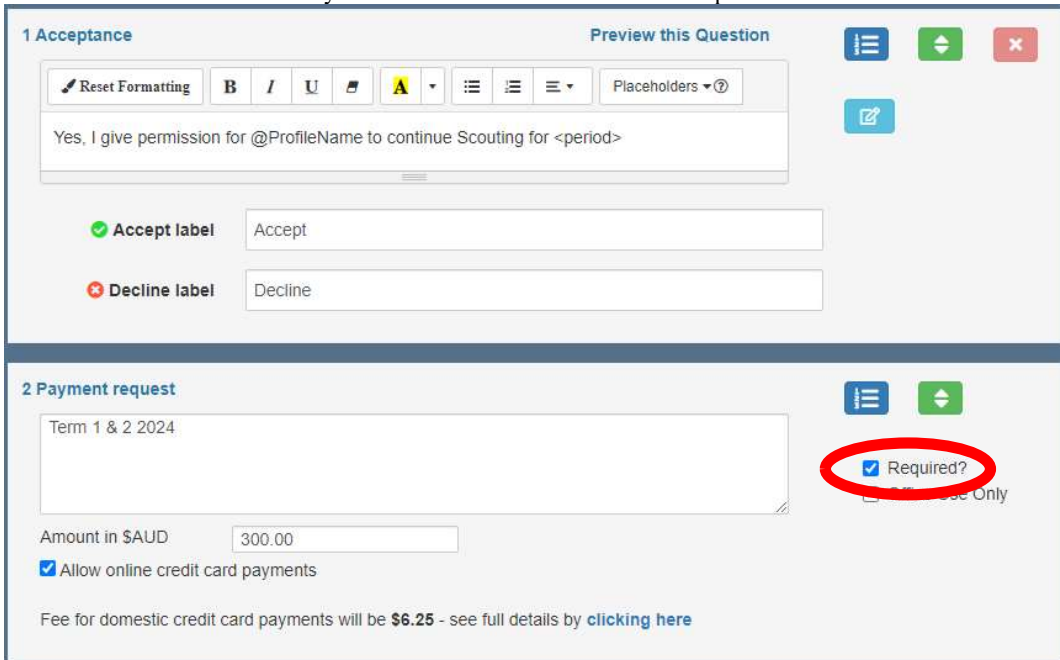
Signatures

Signature **Acceptance** Participant acceptance

Additional Tools

Additional notes Attachment for user **Payment request** Body image

- Edit text fields for both questions as needed. Ticking the *Required* option within the *Payment Request* is required to prevent potential collection issues.
 NB: families **are not required** to make payment if they **decline** the form, however their doing so indicates the families' intention not to continue enrolment of their youth member in your group. If a family declines (or does not respond by the deadline and does not request assistance), it is recommended that the youth member be deactivated so to keep rolls accurate for census/headcounts.



The screenshot shows the eForm editor interface. The top section, '1 Acceptance', includes a text editor with a toolbar (bold, italic, underline, link, unlink, text color, background color, bulleted list, numbered list, indent, outdent) and a text area containing the text: "Yes, I give permission for @ProfileName to continue Scouting for <period>". Below the text area are two input fields: 'Accept label' with the value 'Accept' and 'Decline label' with the value 'Decline'. The bottom section, '2 Payment request', includes a text area with 'Term 1 & 2 2024', an 'Amount in \$AUD' field with '300.00', a checked 'Allow online credit card payments' checkbox, and a 'Required?' checkbox which is circled in red. A link 'clicking here' is provided for more details on fees.

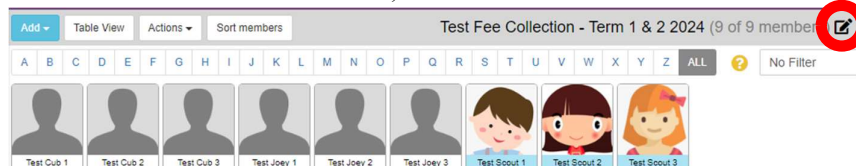
Cost of using Operoo & Stripe to collect Fees

Once an amount is entered into the *Payment Request* at Step 5 above, the fee payable is displayed. Fees are deducted from the payment that Stripe sends to your group's bank account at the end of the day. To incorporate the Stripe fee into the payment request, please use *10.1 Stripe Fee Calculator* on the Scouts ACT website (Member Links → [Operoo Guides](#)) to calculate the cost of acceptance.

Net payments are deposited in respective groups' bank accounts.

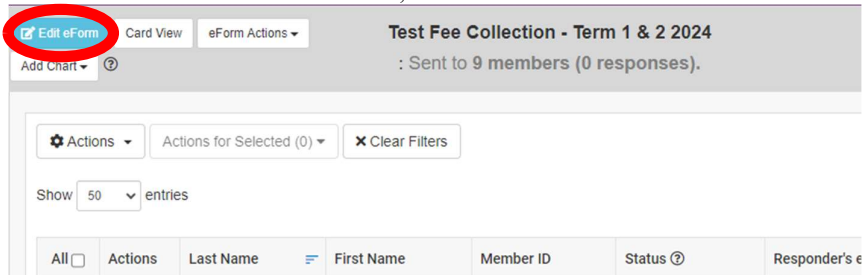
- Review the form and click *Save* to proceed to *Member Selection*. Once saved, a navigation bar will appear on the top of the page, this can be used to navigate across the tabs. You will be able to leave Operoo and edit your form later.

To edit the eForm when in Card View, click on the Edit icon:



The screenshot shows the Member Selection interface in Card View. At the top, there is a navigation bar with 'Add', 'Table View', 'Actions', and 'Sort members'. The main title is 'Test Fee Collection - Term 1 & 2 2024 (9 of 9 members)'. Below the navigation bar is a grid of member avatars. The first six are grey silhouettes labeled 'Test Cub 1' through 'Test Joey 3'. The last three are colorful avatars labeled 'Test Scout 1', 'Test Scout 2', and 'Test Scout 3'. A red circle highlights the 'Edit' icon (a pencil) in the top right corner of the navigation bar.

To edit the eForm when in Table View, click on the *Edit eForm* button:

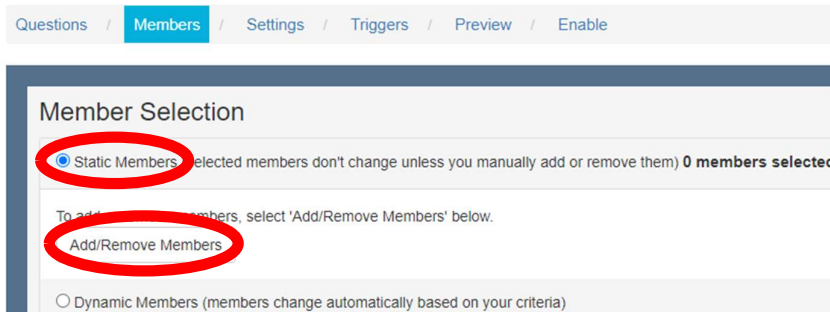


The screenshot shows the Member Selection interface in Table View. At the top, there is a navigation bar with 'Add', 'Table View', 'Actions', and 'Sort members'. The main title is 'Test Fee Collection - Term 1 & 2 2024 : Sent to 9 members (0 responses)'. Below the navigation bar is a table with columns for 'All', 'Actions', 'Last Name', 'First Name', 'Member ID', 'Status', and 'Responder's e'. A red circle highlights the 'Edit eForm' button (a pencil icon) in the top left corner of the navigation bar.

Members tab: Choose Who Receives This Form

Send this form to specific youth members, selected sections or the whole group. To do this, click the *Add/Remove Members*. New members joining during the period will need to be manually added to the form.

Make any necessary changes and click the *Save and Next* button to save any changes.



Questions / **Members** / Settings / Triggers / Preview / Enable

Member Selection

Static Members (selected members don't change unless you manually add or remove them) **0 members selected**

To add members, select 'Add/Remove Members' below.

Add/Remove Members

Dynamic Members (members change automatically based on your criteria)

Settings tab

Fields that can be changed include:

- *Responses can be accepted and changed up until*: recommended to set this to a number of weeks before end of the period to allow time to follow up with families.
- *Frequency of reminder emails*: this sets up reminders for non-responders.
- *Requires up to date Care Profile*: please select "Yes".
- *Send email notification when an eForm response is submitted or changed to*: recommended to leave this blank, as responses are easily readable in Operoo.
- *Reply to*: if someone replies to the Operoo email, entering an email in this field nominates a contact person to receive these emails. By default, this field automatically populates with the email address of the person creating the form.
- *Automatically archive this eForm on*: optional. eForms can be archived manually once registrations are finalised for the period.

Make any necessary changes and click the *Save and Next* button to save any changes.

Triggers tab

In most cases this will not be required, click 'Next'

However, there is some functionality for Operoo to perform actions automatically based on how the form is filled out. For instance, if your group is recruiting adult helpers, you could add a Yes/No question along the lines of "Are you interested in helping out at <Scout Group Name> with <examples of duties>?", and any positive responses could be set to trigger an email to the Membership Officer.

Make any necessary changes and click the *Next* button to save any changes.

Preview tab

This tab shows how the form will look to families. If changes are required, click on the Questions tab.

There is also an option to Send Test Email to view the email parents will receive.

Make any necessary changes and click the *Next* button to save any changes.

Enable/Disable tab

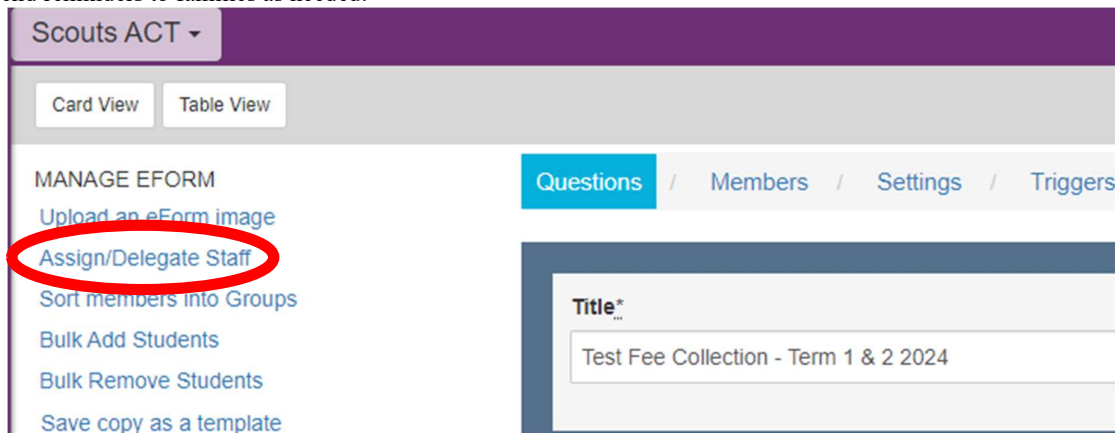
Clicking the *Enable Now* button turns the form on and sends an email to families. There might be a slight delay and it can take up to two hours for all emails to be sent if the form has many respondents.

Alternatively, enter a date into the *Enter auto-enable date and time* box to turn the form on at a future date. If you need to stop responses after a form is enabled, this tab will be called *Disable* and the button will read *Disable Now*.

Make any necessary changes and click the *Done* button to save any changes.

Working with Other Adult Members? Assign/Delegate the form

Delegate forms to fellow committee members or leaders so that they can update forms, manage responses and send reminders to families as needed.



Look up adult member(s) by name or membership number and click on their name to add them to the list – this can be done for multiple leaders at the same time. Once all leaders are found, click on the *Delegate* button.

Staff Search:

Assign Delegate

To assign/delegate staff to this eForm, simply type their name above, click on the name presented then click Assign or Delegate.

Assign - Give staff access to the Member details and the responses of this eForm in Operoo Central.

Delegate - Gives staff administrator access to this eForm in Operoo Central; allowing complete control over who this eForm is sent to and it's responses.

Discounts & Varying Fees

Discounts can be applied, or different fees can be charged in two ways, either

- I. Creating separate eForms
- II. Applying payments to select responses

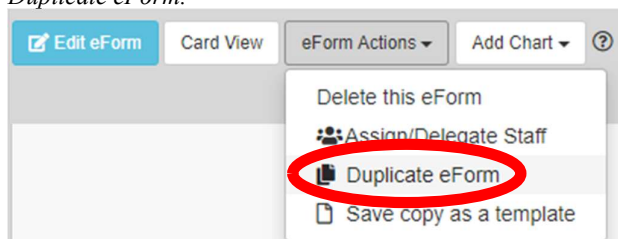
It is not recommended to have multiple payment options on one eForm, as this might cause confusion (families paying the incorrect option and needing a refund/top-up payment, or not paying at all).

I. Creating separate form(s)

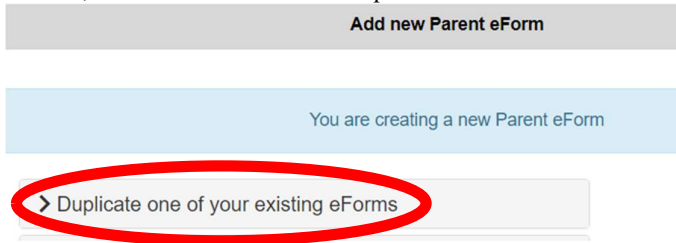
This is recommended if your group:

- Collects section fees, and needs to keep track of income for each section
- Charges a different amount (either by section or other measure) to some subgroups

The easiest way to do this is duplicate an existing form – open an existing form, click on *eForm Actions* → *Duplicate eForm*.



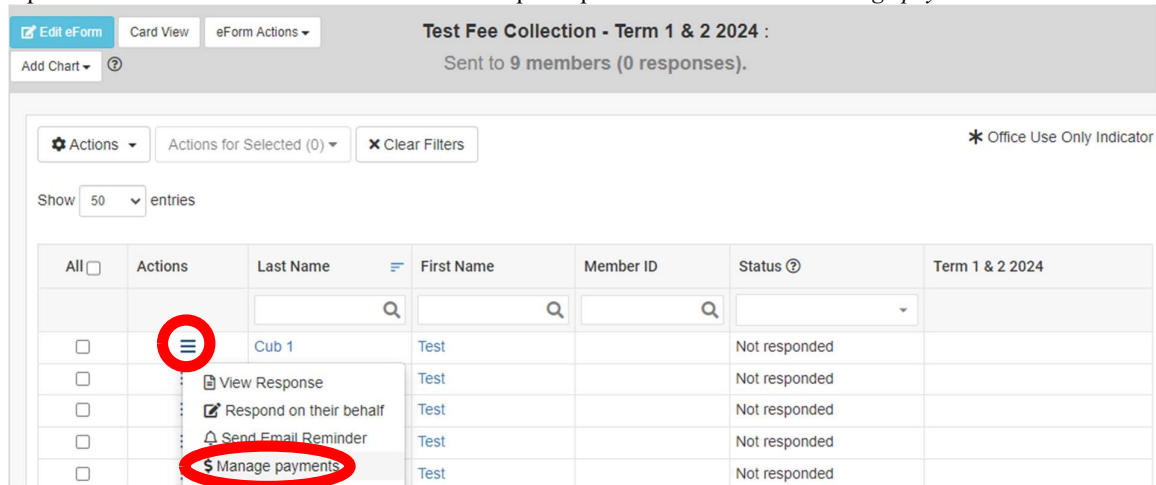
Alternatively, follow steps 1 and 2 in [Creating a Fee Form](#) above, then click on *Duplicate one of your existing eForms*, and select the form to be duplicated.



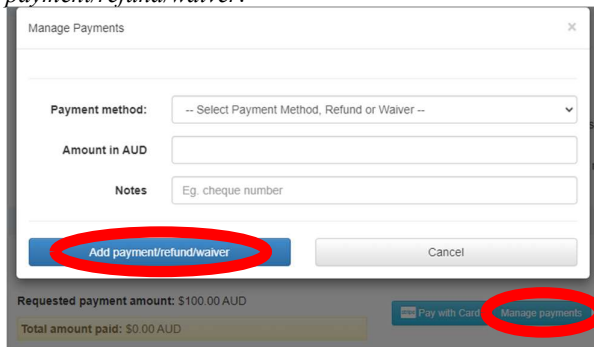
II. Applying Payments

This is more suitable if a small number of respondents need their fees changed. Payments should be applied before the form is enabled, and multiple payments/waivers can be applied for each respondent.

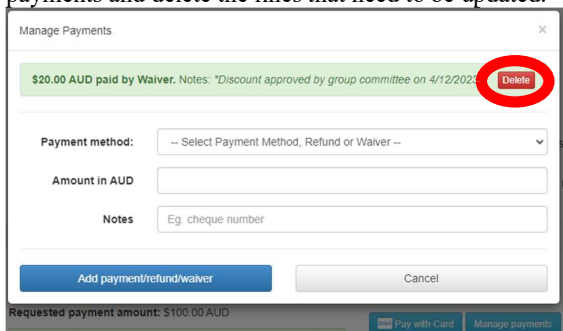
Open the form and click on the ☰ icon beside the participant's name and select *Manage payments*.



Click on *Manage payments*, select *Waiver* under the payment method, input the amount and any notes (this could be a reason, like a multi-sibling discount or discount for parent involvement). Once complete, select *Add payment/refund/waiver*.

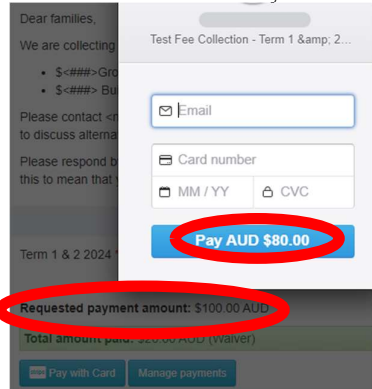


If there is an issue with the waiver applied, the waiver cannot be edited, but it can be deleted. Click on *Manage payments* and delete the lines that need to be updated.





Once a waiver is applied, the amount a family is asked to pay will be reduced. Please note that the amount on the form does not update to show the reduced amount – only when they click on *Pay With Card* will the pop up show the final amount they are asked to pay.



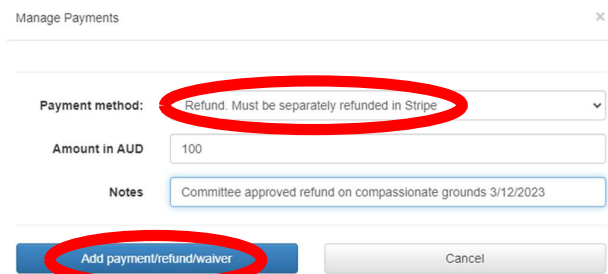
Refunds

This has a two-part process – partly in Operoo and in Stripe. Please note that ***refunding in Operoo alone does not result in a refund to families***. There are no fees when processing a refund, and the refund will be deducted from your Group’s payout, or deducted from your bank account if the total refunds exceeds takings for the day.

Best practice for refunds is to refund to the same payment method only. If the card is cancelled or expired, Stripe is usually still able to process the refund to the card issuer, and the cardholder should contact their issuer to access the refund.

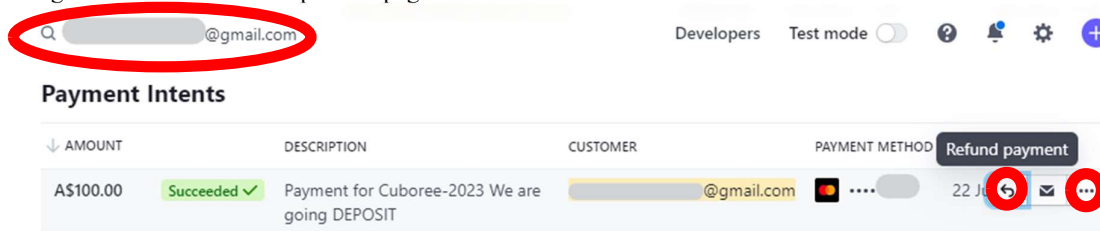
I. Refund in Operoo

Follow the steps outlined in [II. Applying Payments](#) above to manage payments for the selected respondent and select the Payment Method: *Refund. Must be separately refunded in Stripe*. Enter the Amount and Notes accordingly, then click *Add payment/refund/waiver*.



II. Refund in Stripe

[Log into Stripe](#) and search for either the member’s name (use both first and last names) or the responder’s email using the Search bar at the top of the page:





Once the payment is found, hover over the ellipsis (...) then click on the arrow (↩) to open the refund window. Select a reason, add any notes, and click on the *Refund* button. Stripe automatically sends an email receipt when the refund is processed.

Refund payment

ⓘ Refunds take 5-10 days to appear on a customer's statement. Stripe's fees for the original payment won't be returned, but there are no additional fees for the refund. [Learn more.](#)

Refund

Reason

A note is required when a provided reason isn't selected.