



How to guide for:

Creating an Activity Consent form in Operoo for
Multi-Group and Branch-Wide Activities

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What does this cover?

How a leader creates an activity consent form for multi-group and branch-wide activities and sends it to parents/Rovers.

****IMPORTANT****

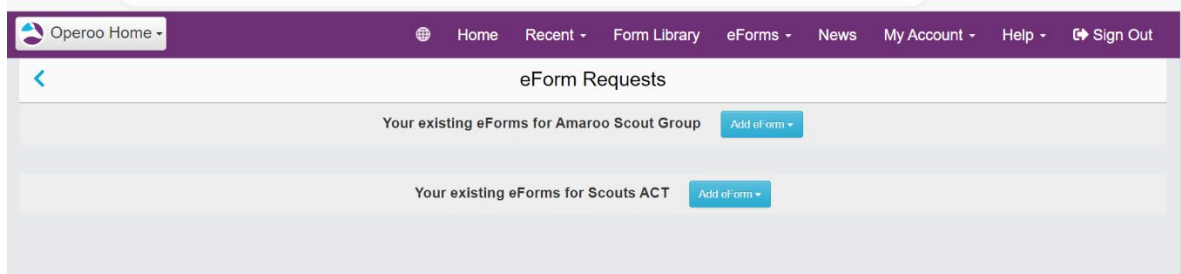
Before an Activity Consent form can be sent, the activity needs to have an **approved Activity or Adventurous Activity Approval form**.

If your activity involves multiple groups or is a branch-wide activity contact admin@scoutsact.com.au to grant you temporary Scouts ACT permission in Operoo. Your group or team leader will need to provide the Scouts ACT Office Team with authority to provide this access.

Please DO NOT start step 6 until this permission has been provided.

Leaders who regularly run multi-group or branch-wide activities (such as Adventurous Activities Branch Activity Leaders) will be nominated by their group or team leader for permanent Scouts ACT permission in Operoo. These leaders will not need to seek Scouts ACT access permission every time they create a multi-group or branch-wide activity.

Sometimes a leader needing permanent Scouts ACT access in Operoo will have multiple roles, for example within a group and within an Adventurous Activities team. In this case that leader will be set up with two staff profiles in Operoo. This will enable the leader to select either their group or Scouts ACT when creating forms.

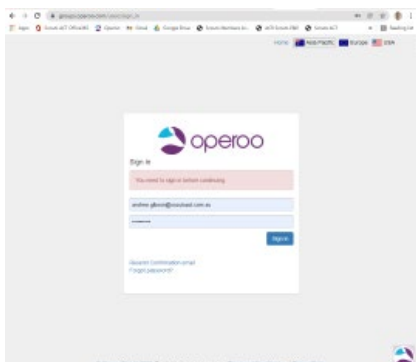


PLEASE NOTE: Members with Scouts ACT access in Operoo DO NOT have access to all members' personal and/or health records. This information is only accessible once a member consents to join an activity that you either have created or have been assigned.

What are the steps?

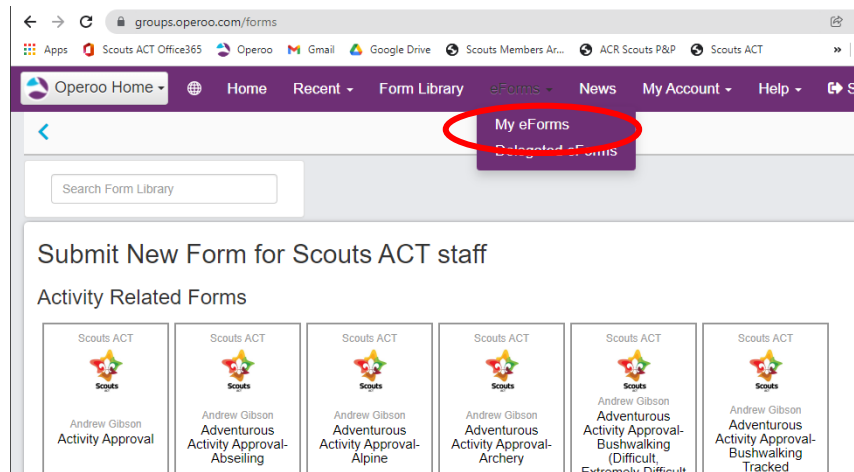
1. Login to Operoo

[Go to Operoo website and login using your email/password.](#)

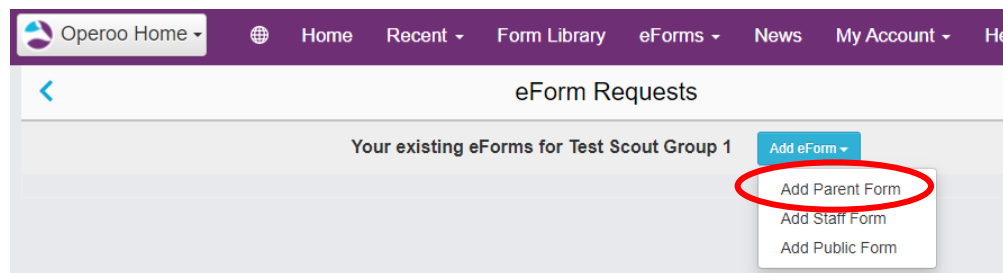


2. Create the activity consent form

On the top-level menu. Select eForms → My eForms.



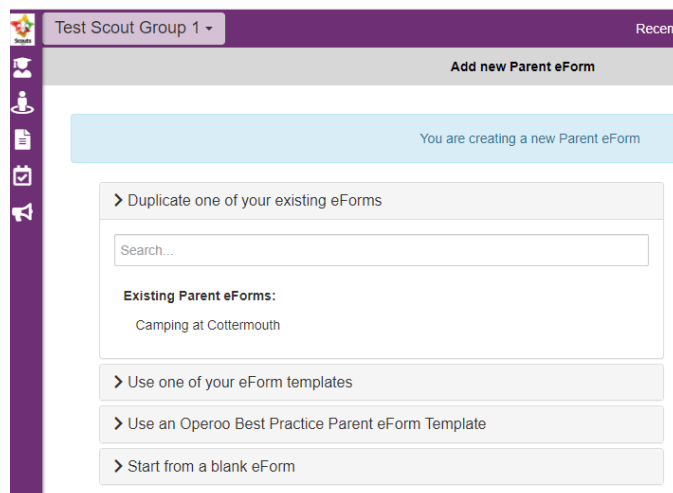
3. Click on Add eForm and choose 'Add Parent Form'



4. Choose one of the following two options:

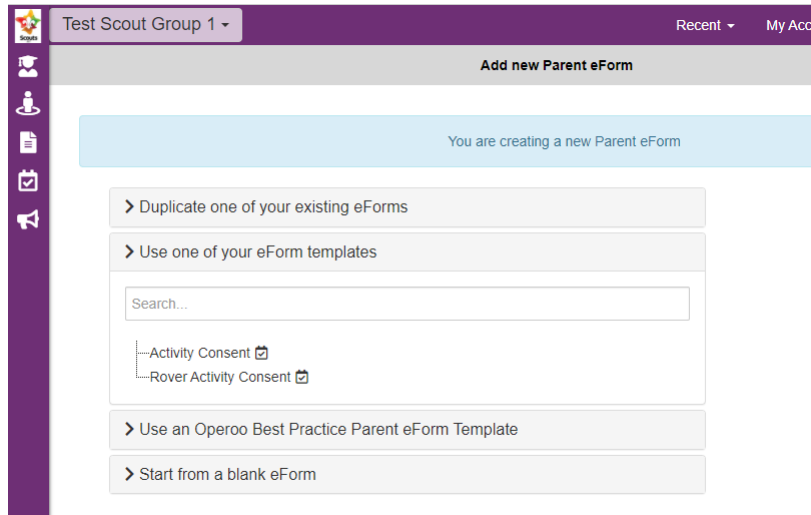
A. Duplicate one of your existing forms:

If you have a recurring activity that is run each term or year (e.g., Camping at Cottermouth), you can reuse a past activity consent form and change some of the details.



B. Use one of your eForm templates

We have created a generic template that can then be edited as required, including the ability to add or remove questions.



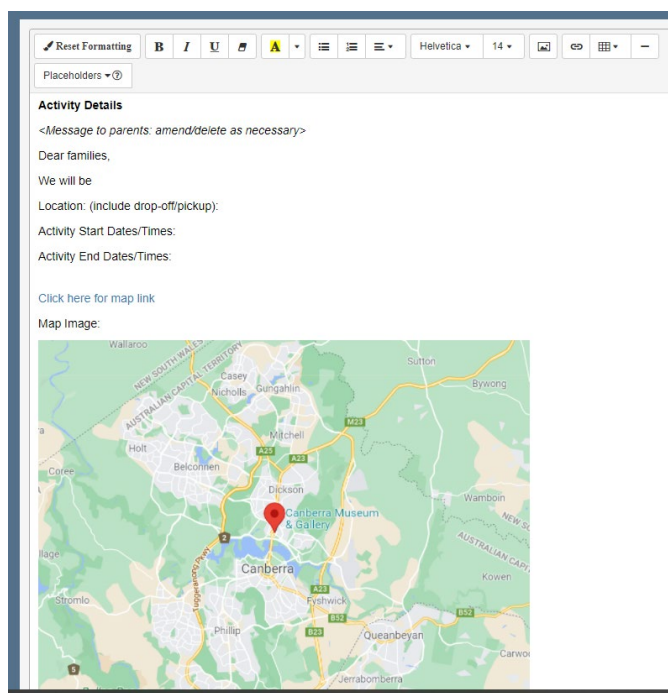
Once you have chosen the form that you want to use, the process that follows is the same.

5. Fill out the form information

Review the existing questions and edit the details as required. Make sure to give the 'Title' field a meaningful name such as "Lake Cobargo Group Camp"

Activity details

Here you have rich text formatting available, as well as the ability to add links to your text (e.g., Google link) or embed an image (map).



Adding new questions

At the bottom of the form, you can choose to add different types of questions. There are a variety of questions available. You can always add and delete these and preview them to check they are what you need.

The screenshot shows a panel titled 'Questions' with several categories of question types. The categories are: Questions, Signatures, and Additional Tools. Each category contains several buttons representing different question types.

Questions

- Multiple choice question
- Single choice question
- Single text line question
- Textbox question
- Yes/no question
- Checkbox question
- Attachment request
- Appointment time
- Request volunteers
- Working with children check
- Date request
- Table
- Multi columned list
- A time selection (hh:mm) request
- A number (integer or decimal) request
- An email address request

Signatures

- Signature
- Acceptance
- Participant acceptance

Additional Tools

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

Editing questions

Whether you have just added a new question, or would like to modify a question that comes with the template, you have the ability to change these as follow:

- Reword the question / available answers
- Reorder questions
- Mark as mandatory
- Delete

The screenshot shows a question editing interface for '2. Request volunteers'. The question text is 'Are you able to provide assistance with this activity?'. There are two options: 'Option 1 Yes' and 'Option 2 No'. The 'Required?' checkbox is checked, and the 'Office Use Only' checkbox is unchecked. There are icons for menu, up/down arrows, and delete (X) at the top right, and a plus sign (+) at the bottom left.

Once you have finished creating the form questions, click Save

6. Choose who receives the form

As you now have Scouts ACT access, you can send this form to youth members across the branch and also to non-ACT Scouting members.

To choose specific members, click the Add/Remove Members button.

eForm Member Selection : Lake Cobargo Group Camp

Questions / **Members** / Settings / Triggers / Preview / Send Test Email

Member Selection

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

To add or remove members either:

- Select 'Add/Remove Members' below; or
- Use drag and drop (administrators only)

Dynamic Members (members change automatically based on your criteria)

Any member from Scouts ACT as well as non-ACT Scouting members will be available for you to choose.

Activity Consent - Test - Jo - Manage Members x

Source

Search groups... X

- Scouts ACT
- non-ACT Scouting members
- eForms

Members (13) Add All

test X

- Test Cub 1
- Test Cub 2
- Test Cub 3 +
- Test Joey 1 +
- Test Joey 2 +
- Test Joey 3 +
- Test Scout 1 +
- Test Scout 2 +
- Test Scout 3 +
- Test Scout 4 +

eForm Members (2) Remove All

Search... X

- Test Cub 1 X
- Test Cub 2 X

Enter the member's name in the search bar (below "Members"). Click on the name or + sign. The chosen member will appear under "eForm Members".

If Scouts from outside the ACT are attending (and not currently listed in Operoo as non-ACT Scouting members) they will need to be created as members in Operoo. Contact admin@scoutsact.com.au to do this. They will be added as "non-ACT Scouting members".

Once added you should add them to the form.

Press Save. Then press Confirm.

7. Configure the form settings.

Fields that you will need to enter/review include:

- Event Start Date**
- Event End Date**
- Responses can be accepted and changed up until** – for example if you have a weekend group camp, you may wish to close off responses by Thursday to allow for food shopping.
- Frequency** and timing of reminder emails
- Enabled** – This effectively turns the form on. Once you check this, an email will send to parents in about 2 hours' time. This allows a buffer in case any small changes need to be made.
- Auto-enable in the future** – allows you to turn the form on at a future date.
- Requires up to date Care Profile** – please select "Yes"
- Send email notification when an eForm response is submitted or changed to** – normally leave this blank as you can more easily view who is attending your activity via the Operoo dashboard
- Reply to:** if someone directly replies to the Operoo activity consent form email with any questions, you can redirect emails to you. This will automatically populate with your email address (as the person creating the form).
- Automatically archive this eForm on:** if this is a one-off activity, normally set this to archive at a date after the event occurs.
- Select the colour:** best practice is to choose the colour that relates to the section (e.g. yellow for Cubs), so forms are more easily identified amongst other consent forms.

Once you have reviewed this, click Save and Next.

8. Triggers

In most cases this will not be required and you can Click 'Next'

However, you do have some functionality for Operoo to perform actions on your behalf based on how the form is filled out.

For instance, if a parent has indicated they can help out with say driving kids to an activity, you may want that to then trigger an email with map details or information for reimbursement of petrol.

eForm Request Triggers : Lake Cobargo Group Camp

[Questions](#) / [Members](#) / [Settings](#) / [Triggers](#) / [Preview](#) / [Send Test Email](#)

Select a question

Are you able to provide assistance wi... (Volunteer) ▾

Choose a rule

Provided any answer ▾

Choose action to execute

Send an email ▾

Choose sub action to execute

Send an email to the member (student or staff) ▾

Execute action immediately

Subject: Placeholders ▾

Test email

Body:

Reset Formatting
 B *I* U ~~ABC~~
 A ▾
 ☰ ☷ ☶ ▾
 Helvetica ▾ 14 ▾

 ▾
 -

Placeholders ▾

Email message goes here

Create new trigger
Next

9. Preview

This tab will then show you how the form will look to parents. If any changes are required, simply click back to the Form Questions tab

10. Send Test Email

Should you wish click send to view what email parents will receive.

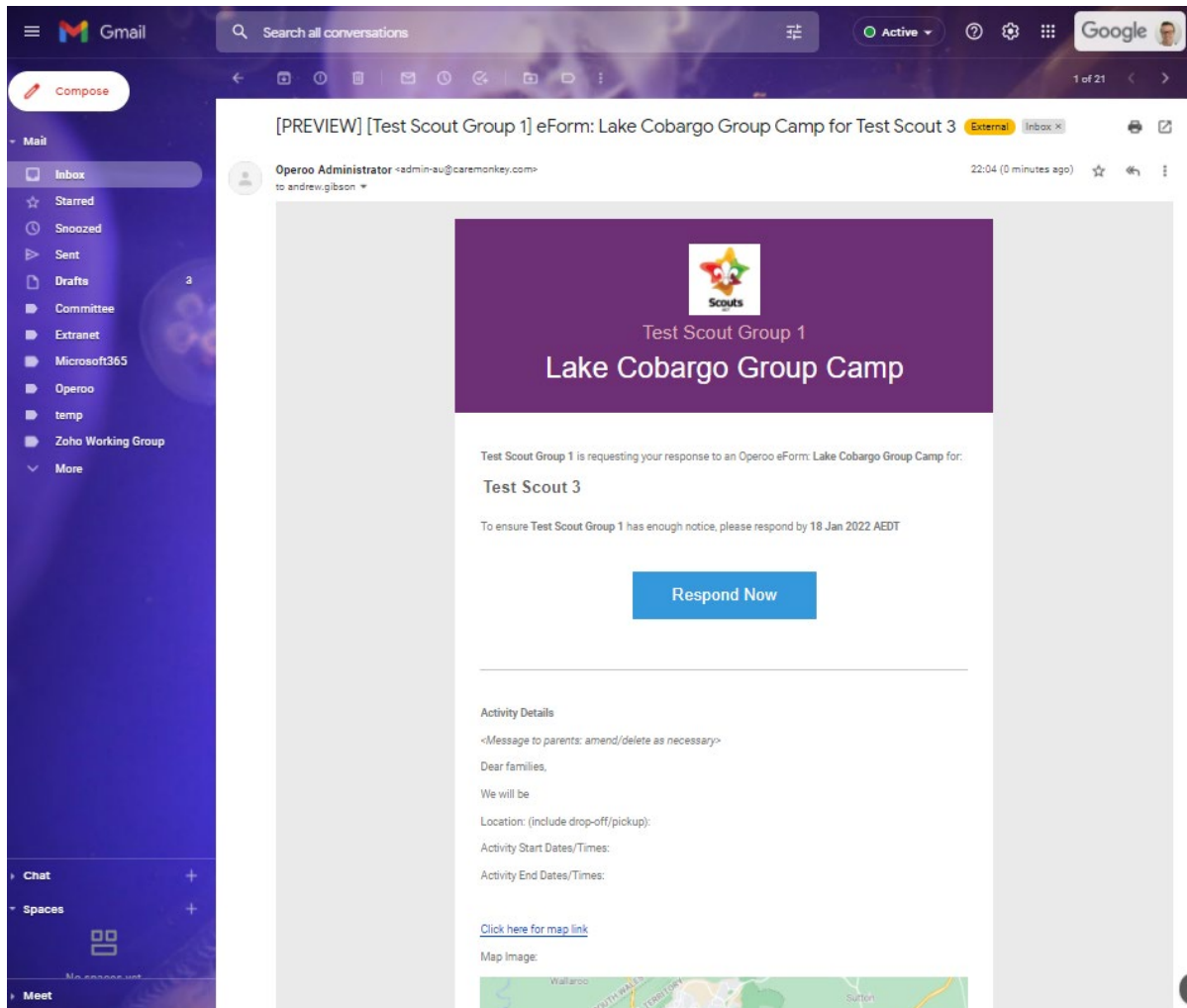
eForm Request Test Email : Lake Cobargo Group Camp

[Questions](#) / [Members](#) / [Settings](#) / [Triggers](#) / [Preview](#) / [Send Test Email](#)

Enter an email address and we'll send you a sample email

andrew.gibson@scoutsact.com.au Send

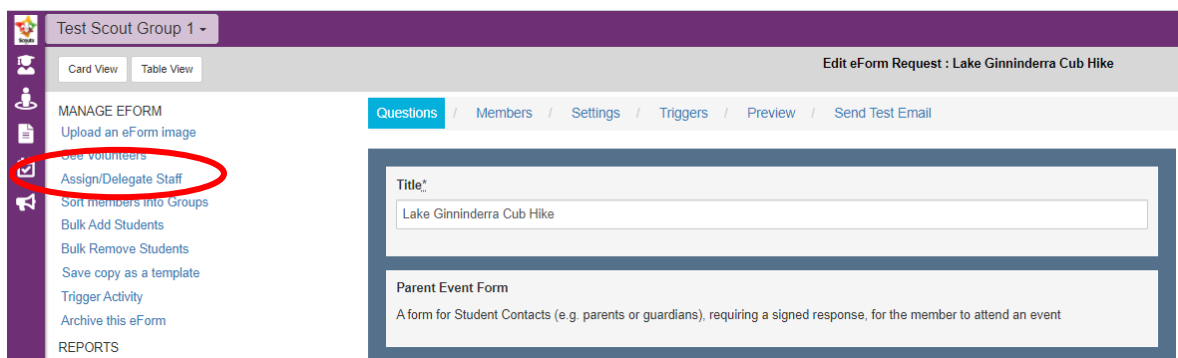
Back
Done



Once you are happy with this you can close the form. It is then accessible via the Groups and eForms section on the homepage of Operoo where you can view responses and manage your activity.

11. Make the form accessible to other leaders

Should you wish other leaders to view the activity consent form and responses on who is attending, you can assign leaders by choosing 'Assign/Delegate Staff' from the menu on the left.



In the Select staff box, click in this and the list of leaders will appear. Choose the leader and click the Assign button then they will appear in a list at the bottom of the screen.

These leaders now have the same level of access to the activity consent form as you.

The screenshot shows the Operoo Central interface for "Test Scout Group 1". The page title is "Assign or Delegate staff to eForm: Lak". The interface includes a search bar labeled "Staff Search:" with a placeholder "Select staff". Below the search bar are two buttons: "Assign" and "Delegate". A text block explains the process: "To assign/delegate staff to this eForm, simply type their name above, click on the name presented then click Assign or Delegate." It then defines the two access types: "Assign - Give staff access to the Member details and the responses of this eForm in Operoo Central." and "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." Below this, there is a "Remove selected permission" button and a list of staff members with checkboxes: "Luke O'Connor (test2) Access type: Assigned" and "Donna Phillips Access type: Assigned". A "Live Chat" icon is visible in the bottom right corner.

12.Enable the form

Enable the form by pressing “Enable Now” or entering the date on which you wish the form to be live. Remember, once the form is enabled, emails will be sent to parents for responses.

Removal of access

Scouts ACT Office staff will remove temporary Scouts ACT access one week after completion of the activity.