How to guide for:

Creating an Activity Consent form in Operoo.

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What does this cover

How a Section Leader creates an Activity Consent form and send it to parents/Rovers.

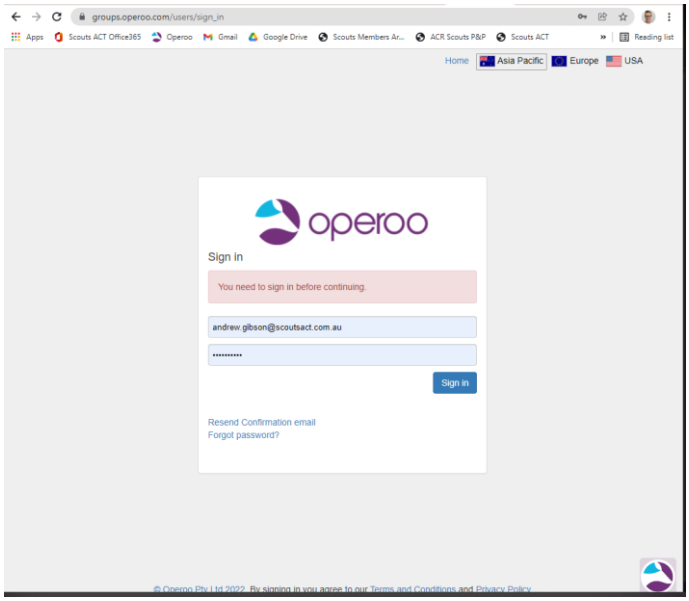
Background Information

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

What are the steps

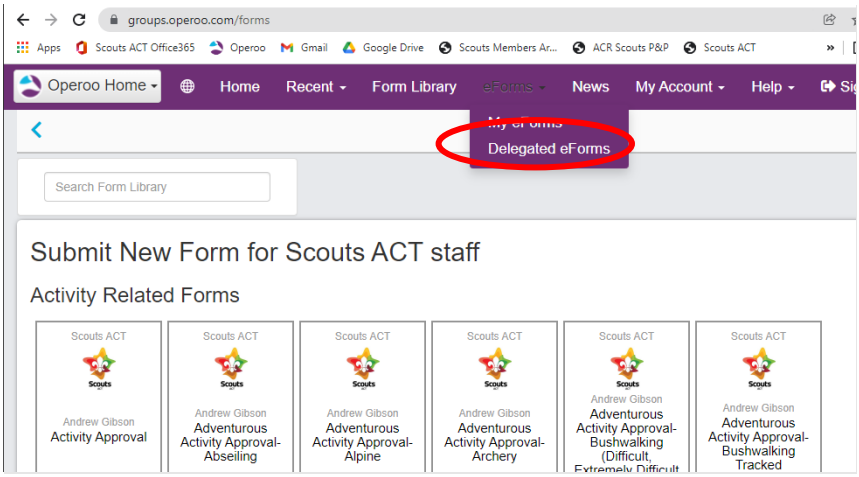
1. Login to Operoo

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

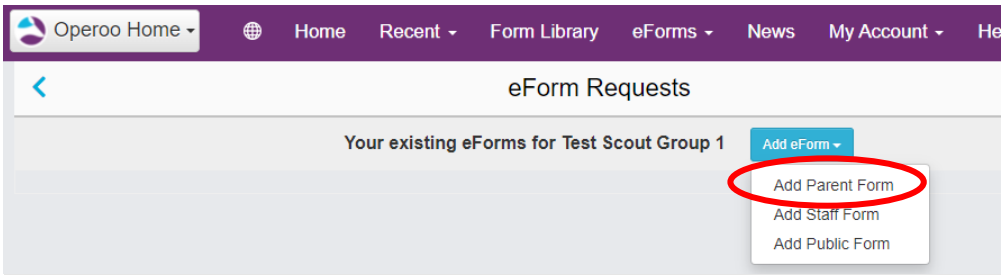


2. Create the activity consent form

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



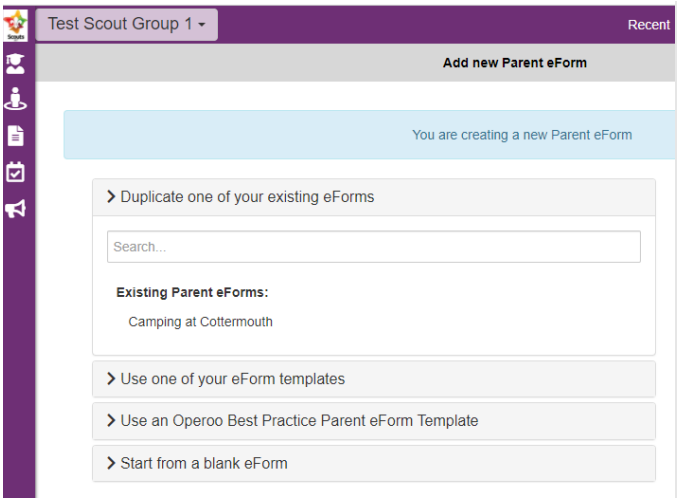
Click on Add eForm and choose ‘Add Parent Form’



Then we recommend you choose from one of two options:

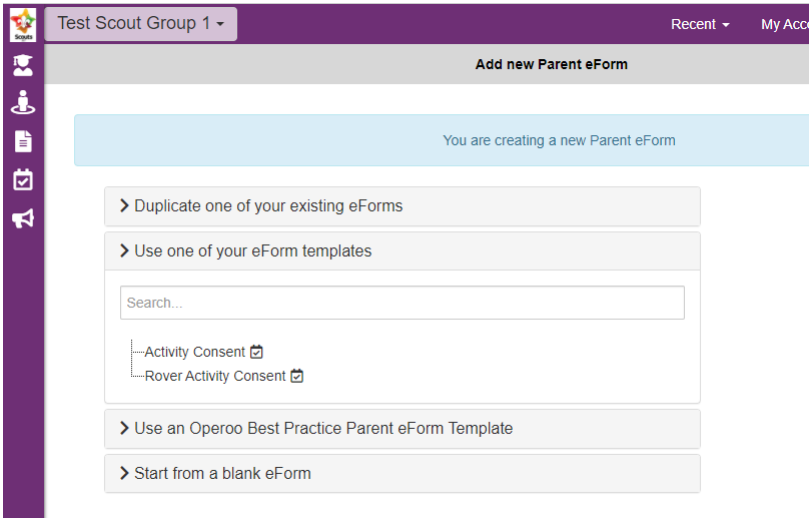
2.1 Duplicate one of your existing forms:

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.



2.2 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.



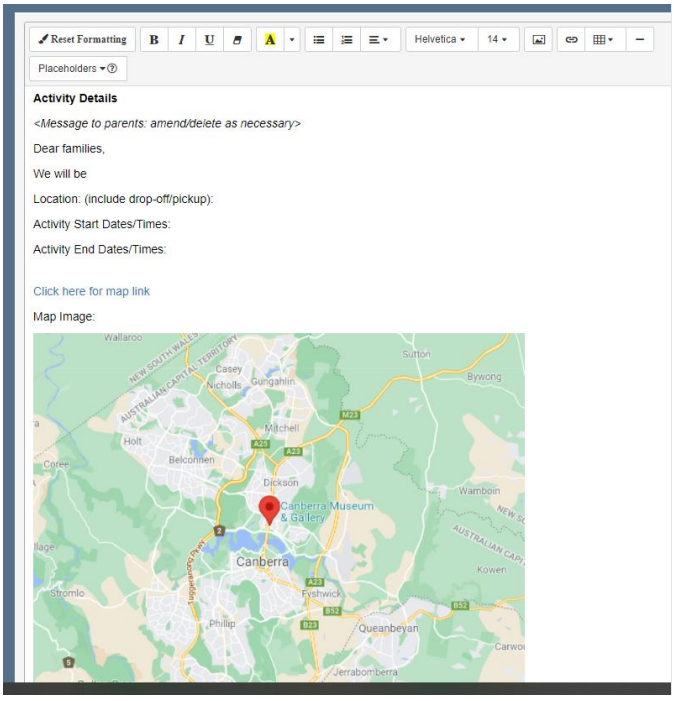
Once you have chosen the form that you want to use, the process that follows is the same.

3. 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"

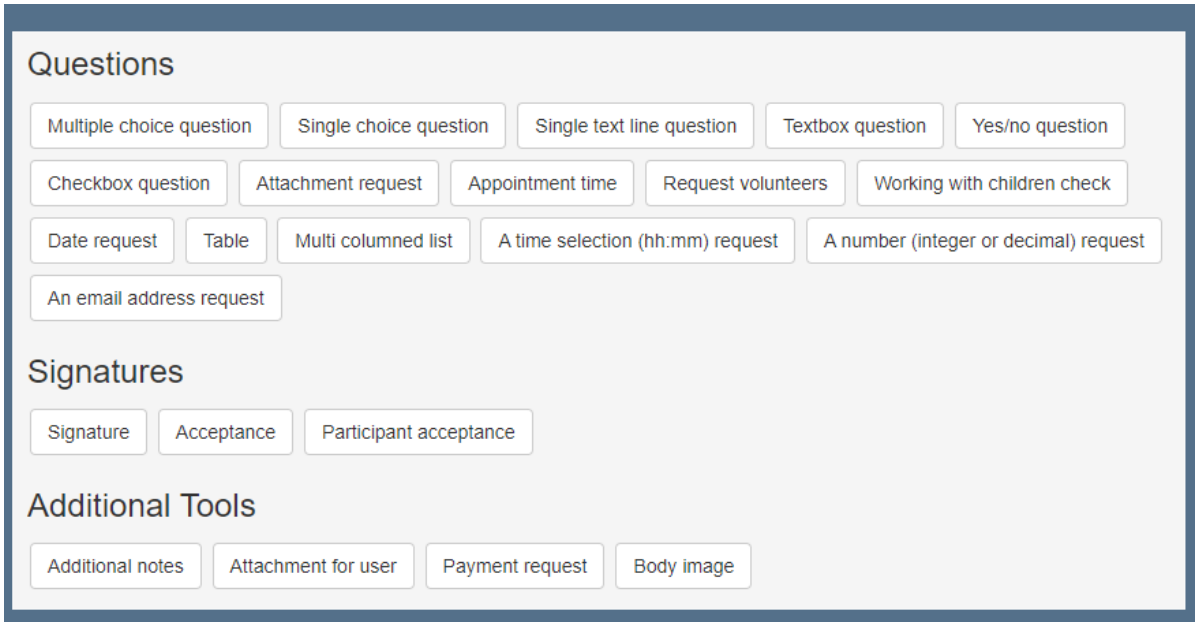
Activity details

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

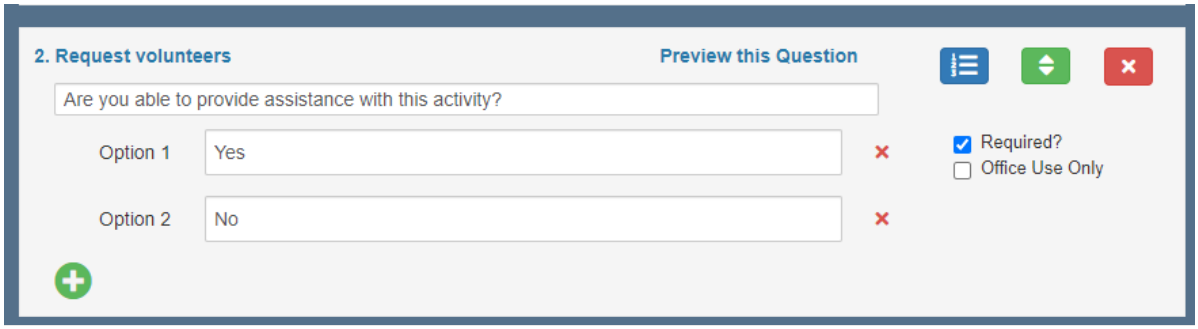
At the bottom of the form, you can choose to add different types of questions. There is variety of questions that should meet most needs. You can always add and delete these, and preview them to check they are what you need.



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

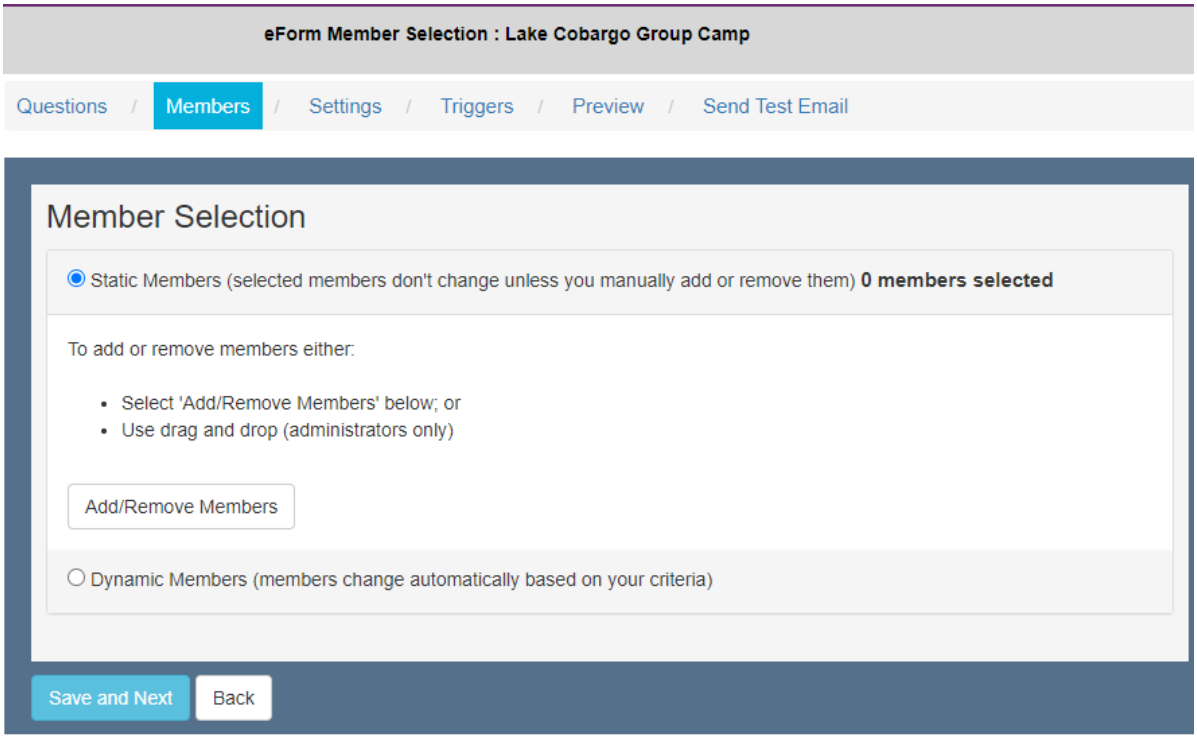


Once you have finished creating the form questions, click Save

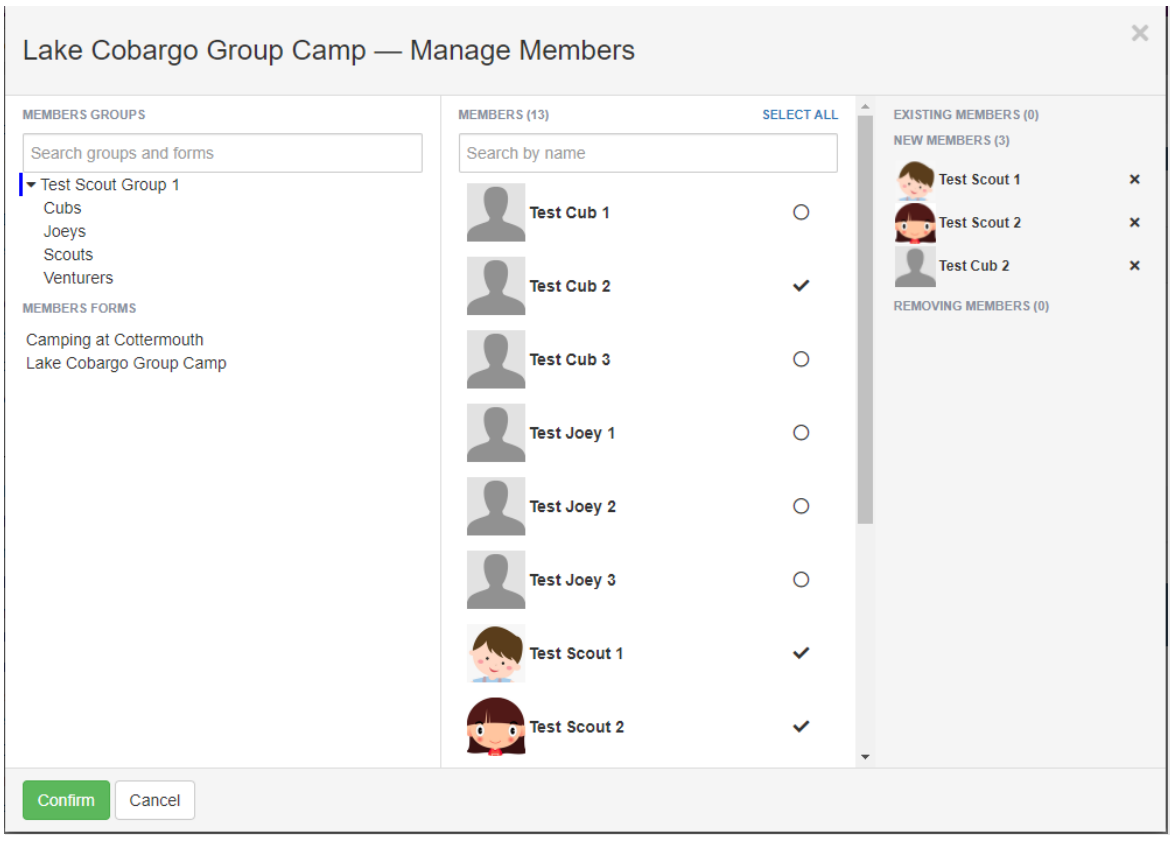
4. Choose who receives the form

You have the ability to send this consent form to specific youth members or a group/section as a whole.

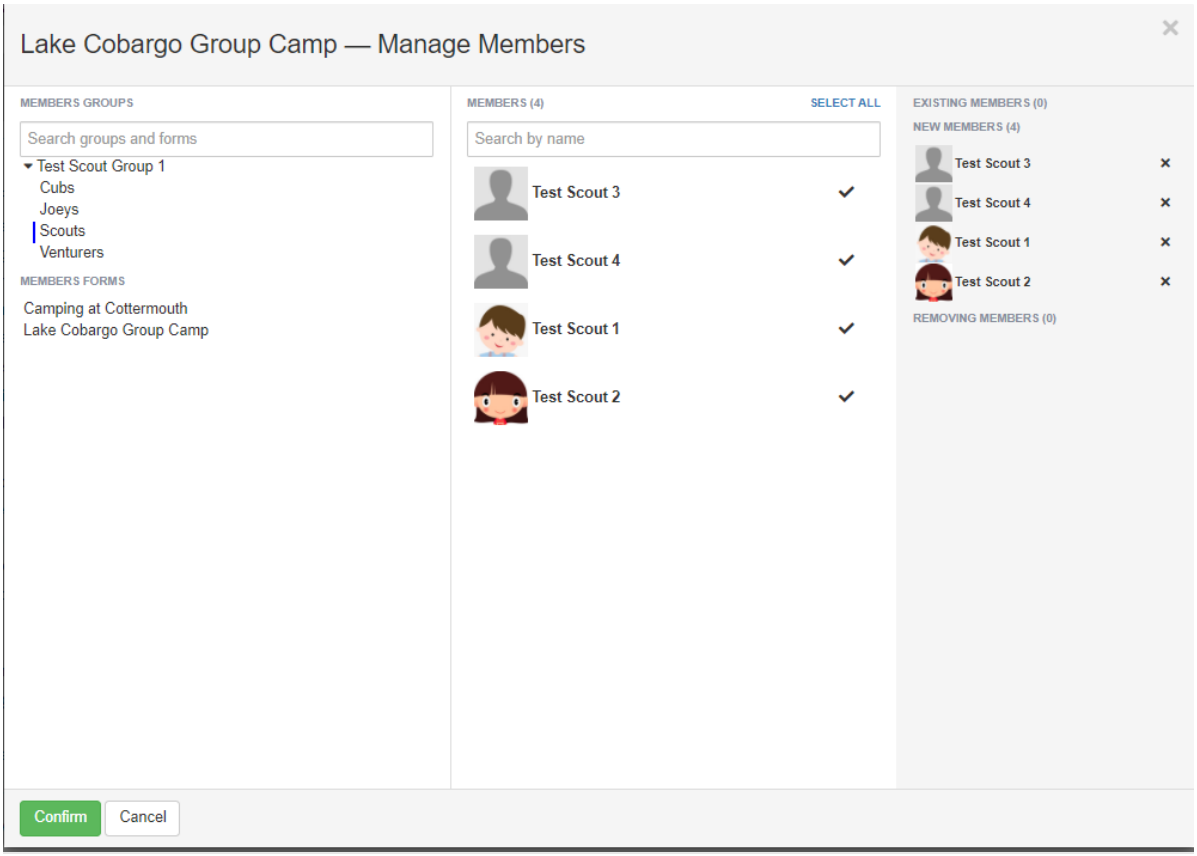
To choose specific members, click the Add/Remove Members button.



You will then see the Group sections are available to you so you can select the individuals (or select all).



You can choose to filter the list of members shown by clicking on a section in the Member Groups column.



Hit confirm once done. Then click Save and Next, and then OK to the message telling you how many members will be added to the form.

5. 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.

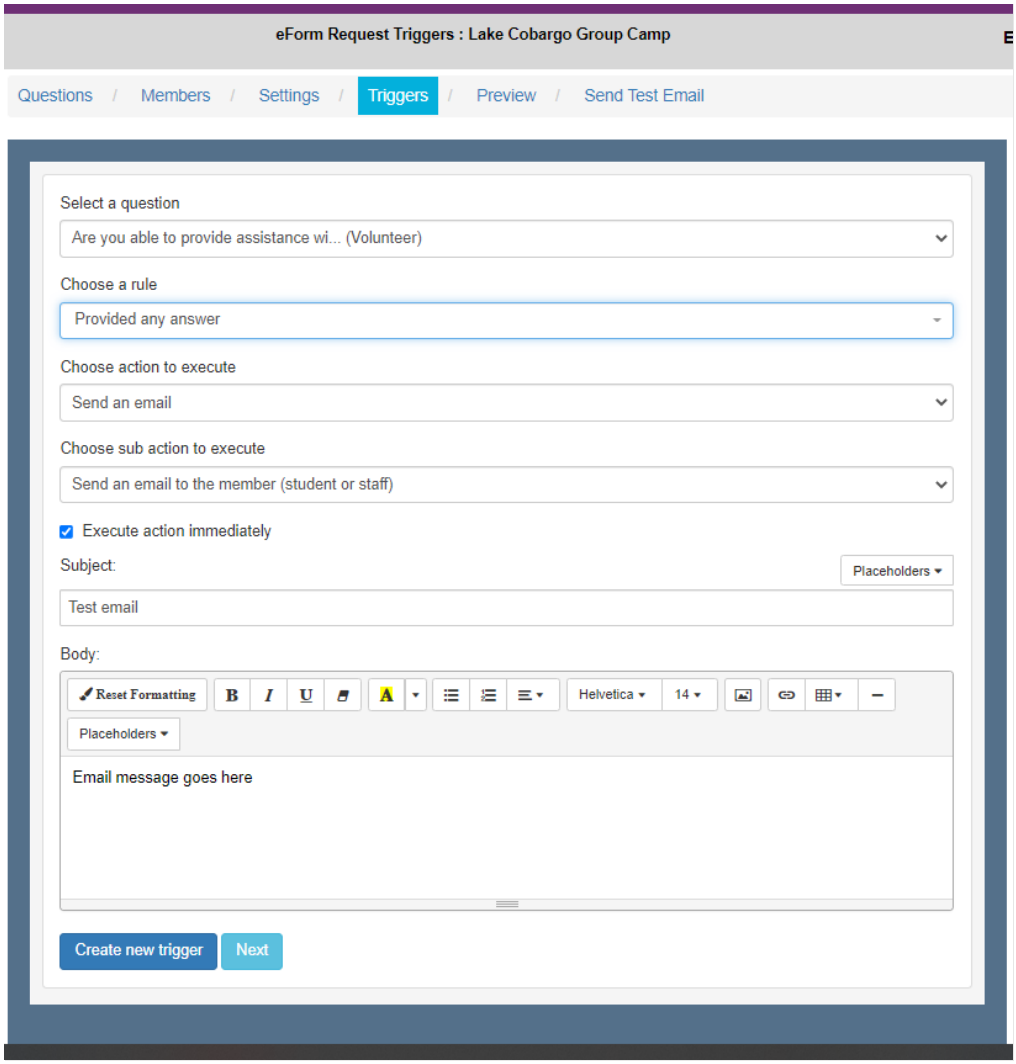
Once you have reviewed this, click Save and Next.

6. 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.

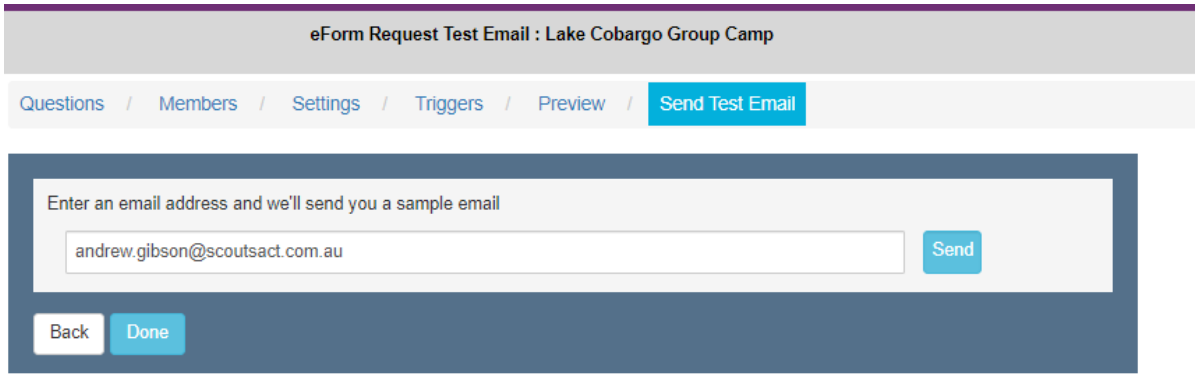


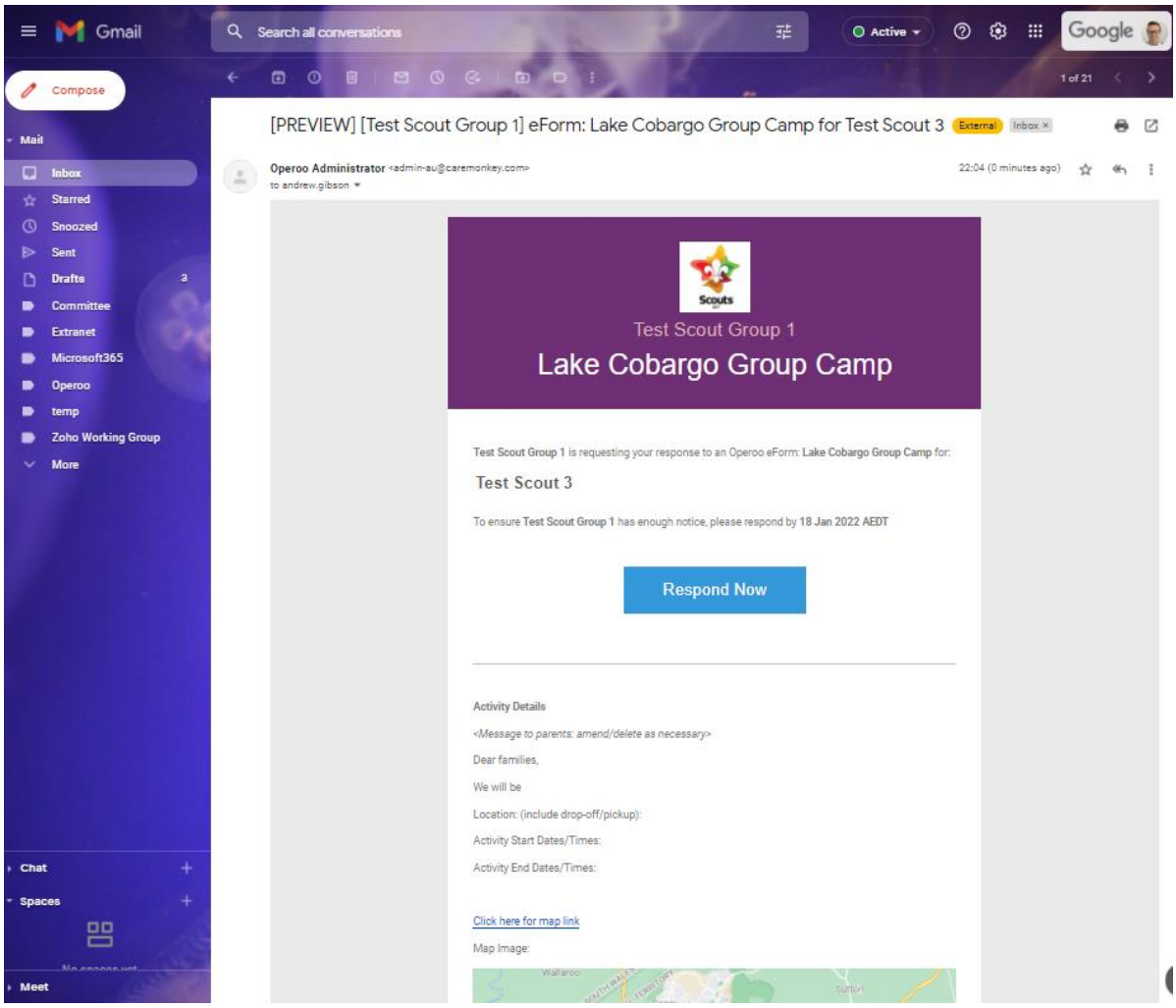
7. Preview

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

8. Send Test Email

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

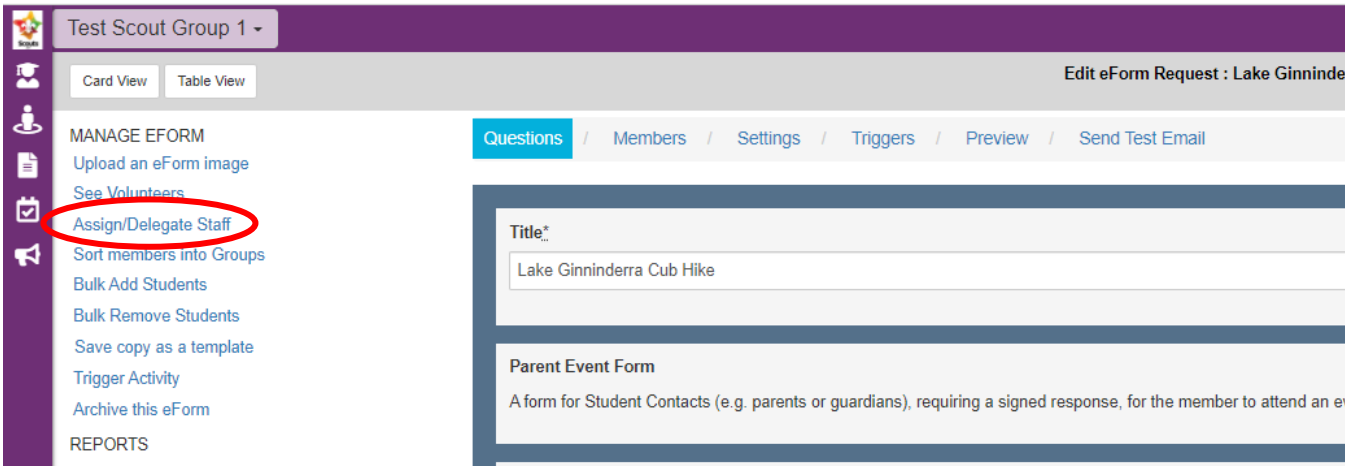




Once you are happy with this you can close the form. It is then accessible via the Groups and eForms section on the Home page of Operoo where you can view responses and manage your activity.

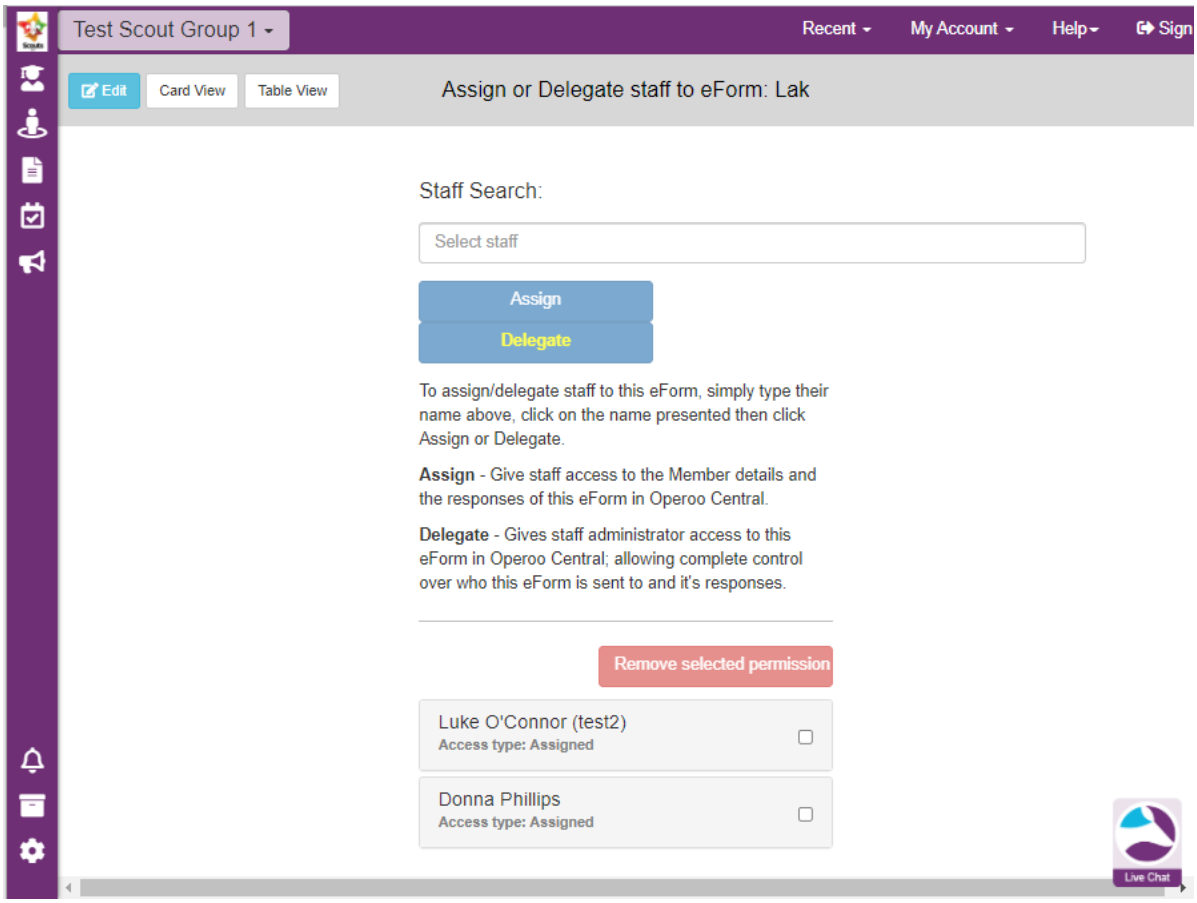
9. Make the form accessible to other leaders in your Group

Should you wish other leaders to view the activity consent form and responses on who is attending, you can



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 form process is now complete.

Just a reminder that once the form is enabled it is live. Emails will be sent out for parents to respond.