



# SLSA IT Systems Guide for Season Close & Start of Season Tasks v9

June 2023



## **INTRODUCTION**

This guide has been designed to assist club officers/administrators perform Close of Season and Start of Season tasks relating to our SLSA IT Systems

This guide is divided into 4 sections

1. Season Close tasks Checklist
2. Detailed information relating to the Season Close tasks listed
3. Start of Season tasks Checklist
4. Detailed information relating to the Start of Season tasks listed.

## SEASON CLOSE TASKS CHECKLIST

		ACTIVITY DESCRIPTION	TASK COMPLETED
1	Memberships		
1.1	Active Members	Check active members have fulfilled obligations	
1.2	Archiving Members	Archive members who have not fulfilled obligations	
1.3	Pending Member Requests	Process outstanding Pending Member Requests	
1.4	Membership Categories	Check members sub-membership categories	
1.5	Transfers	Process outstanding transfers and then archive	
1.6	Online Forms – Recognition Awards	Submit Forms on behalf of Members & Approve Forms submitted by the club or by individual members.	
2	Organisational Management		
2.1	Gear & Equipment	Add/update equipment held by the club	
2.2	Organisational Details	Ensure your organisations details reflect current information and contacts	
2.3	Bank Account Details	Ensure bank details are up to date	
3	Assessments/Awards		
3.1	Assessment Request Lists	Process/submit outstanding Assessments	
4	Patrols		
4.1	Patrol Logs	All relevant patrol data has been entered	
4.2	Incident Report	All Incident Reports have been entered into the IRD system	
5	End of Season Reporting		

## SEASON CLOSE TASKS – DETAILED INFORMATION

All clubs need to follow their State’s Standard Operating Procedures when performing ‘end of season’ activities. It is highly recommended that clubs work through the End of Season Checklist to ensure completeness once State processes have been followed.

### 1. Memberships

The recommended method to ensure that your membership list is accurate is to go through your list of ‘Active’ members and ensure that only those members who have fulfilled your club’s membership obligations remain as Active 2022/2023 registered members.

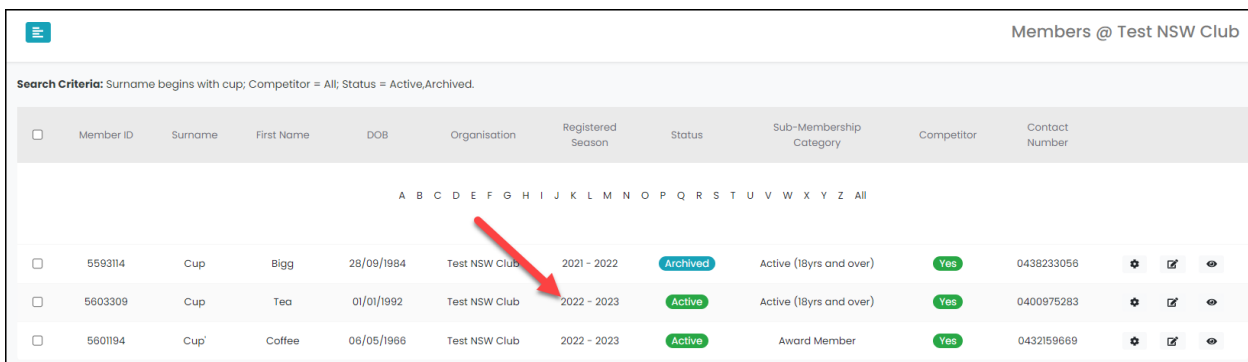
Support Operations and Lifeguards administrators should perform this function so accurate records of this season’s participants are maintained, and those who did not participate are archived.

#### 1.1 Active Members

Active Membership generally means members who have:

- Completed the SLSA membership form (either online or in paper format).
- Paid your club annual fee.
- Fulfilled all of your club/state membership requirements, ie. forms, patrols, etc.

These members should be reflected in Surfguard as registered 2022/23 Season with an ‘Active’ Status.



Member ID	Surname	First Name	DOB	Organisation	Registered Season	Status	Sub-Membership Category	Competitor	Contact Number
5593114	Cup	Bigg	28/09/1984	Test NSW Club	2021 - 2022	Archived	Active (18yrs and over)	Yes	0438233056
5603309	Cup	Tea	01/01/1992	Test NSW Club	2022 - 2023	Active	Active (18yrs and over)	Yes	0400975283
5601194	Cup	Coffee	06/05/1966	Test NSW Club	2022 - 2023	Active	Award Member	Yes	0432159669

The following report can be run to check if Members have or have not fulfilled their patrol obligations at your club: -

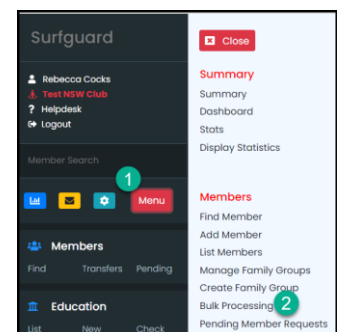
- Reports > Patrol, Report Type: Total Member Patrol Hours
- Output Format: CSV Style
- Click: Advanced Search
- Status: Active
- Registered Season: (enter current season)
- Patrol Hours Specifically for Organisation: tick if you wish to only include hours for your club.
- Season Type: Patrol Season
- Total Hours: Select from the drop-down menu and put the number of hours. Eg Less Than 10
- Display the Report

#### 1.2 Archiving Members

Archiving members is used to filter out those who are no longer members. Generally, people who should be archived include:

- Those who did not perform your club’s patrol obligations.
- Those who were not financial for the current season (did not pay required membership fees).
- Those who have resigned or are no longer participating in the club.
- Any person who has a Registered year prior to 2022-23

**Do Not** Archive all your Members at the end of the season, only archive Members who fit the above criteria. The Bulk Processing function can be used to Archive Members. (1) Menu > (2) Bulk Processing > Select Process Type: Archive > Click “Search” and move members who need to be Archived from the “Available Members to the “Selected Members” > Click “Process”.



### 1.3 Pending Member Requests

All members who join/renew, update their details, or create a family group via the Members Area need their request processed by the club before any updates are shown in Surfguard. These requests are sent as a 'Pending Member Request' and you can access via Surfguard LHS Menu > Members > Pending. All outstanding Pending Member Requests relating to season 2022/2023 should be processed by the end of the season.

**Note:** Any member can use the Members Area so even if your club or organisation does not use electronic membership renewals or allow members to update their personal details electronically, there may still be pending member requests sitting on the system that require your attention.

For more information and user guides on Pending Member Requests in Surfguard and the Members Area please refer to <https://help.sls.com.au/>

### 1.4 Membership Categories

Check your membership lists to ensure that your members are in the correct category. You can run a General Report > Members Report > Report Type: Contact Details and select the specific Membership Type/s you want to display. For example:

- Probationary members who have completed their Award/s should be moved into the appropriate membership category. E.g. Active 15-18; Active 18+, Award Member
- Junior Activity Members who have completed their SRC and patrolled (as a general suggestion) should be moved to 'Cadet'.
- Those who have turned 18 years old and patrolled should be moved to Active 18 years and over.

### 1.5 Transfers

In Surfguard, ensure all transfers have been processed and there are no outstanding transfer requests. Contact the losing/winning club first then if transfers still require attention, contact the Branch/State. Transfers can be accessed via the 'Members' tab > 'Transfers' > Transfers.

### 1.6 Submitting and Approving Online Forms in the Members Area

Clubs administrators/officers will be able to submit and approve Forms on behalf of members via the Members Area if they are in an Officer position in Surfguard and have been assigned **Form Approver**.

**Note:** If a member is in multiple officer positions in Surfguard they only need to update one officer position with admin functions. For more information on how to submit and approve forms in the Members Area [Click Here](#)

The image shows two screenshots from the Surfguard system. The top screenshot, titled "View Officers @ Clovelly", displays a table of officers. The table has columns for Position Name, Requirement Level, Officer, From, To, Officer Position Options, and Officer Options. A red arrow points to the "Officer Options" column for the "Administration" officer, which contains "New", "Edit", and "Delete" buttons. Below the table are buttons for "New Officer Position" and "Setup Officer Position Synonyms". The bottom screenshot, titled "Setup Officer @ Clovelly", shows the "Allocate Officer" form. It includes fields for "Officer Position Name" (set to "Administration"), "Officer" (a dropdown menu), "From Date" (24/07/2017), and "To Date" (21/07/2019). Under "Administrative Functions", there are four checkboxes: "Approve Members Area News content", "Approve Members Area Library content", "SLSA Online Member Store Top Administrator", and "Online Form Approver". A red arrow points to the "Online Form Approver" checkbox. At the bottom of the form are "Update", "Reset", and "Cancel" buttons.

Position Name	Requirement Level	Officer	From	To	Officer Position Options	Officer Options
Administration	National, State, Branch, Club		24/07/2017	21/07/2019		New Edit Delete

## 2. Organisational Management

The following functions can be accessed in Surfguard, via the 'Organisational Management' tab.

### 2.1 Gear and Equipment

Ensure all Gear and Equipment has been entered correctly in Surfguard considering any new equipment purchased or decommissioned during the season. Gear and Equipment lists can also be used for financial statements/asset lists as part of closing off your financials for the season.

### 2.2 Organisational Details

Check your Organisational Details are accurate and up to date.

Details such as Display name, Contact Details, ABN, logos and other club information gets displayed directly from Surfguard to sites such as: SLSA website, Beachsafe, Surfcom, Payment Gateway, etc. and is used by each level of the organisation plus the public to contact you, so it is important that it remains accurate and up to date.

### 2.3 Bank Account Details

To view or edit the bank account details stored in Surfguard for a club, click Menu > Organisational Management > Bank Account Details. This information needs to be current as the bank account details are used for Direct Deposit information if the club uses this option as a method of payment. If your club has a Payment Gateway account and your bank account details have changed or your club is not receiving payment notification emails, you must complete a Form 075 available from SLSA Online Help <https://help.sls.com.au> > Useful Forms

## 3. Assessments/Awards

### 3.1 Assessment Request List in Surfguard

Check your "Assessment Request List" to ensure there are no outstanding assessments waiting for processing and that assessments are submitted, updated, or deleted (by clubs). Contact your Branch or State centre for any assessment processing problems.

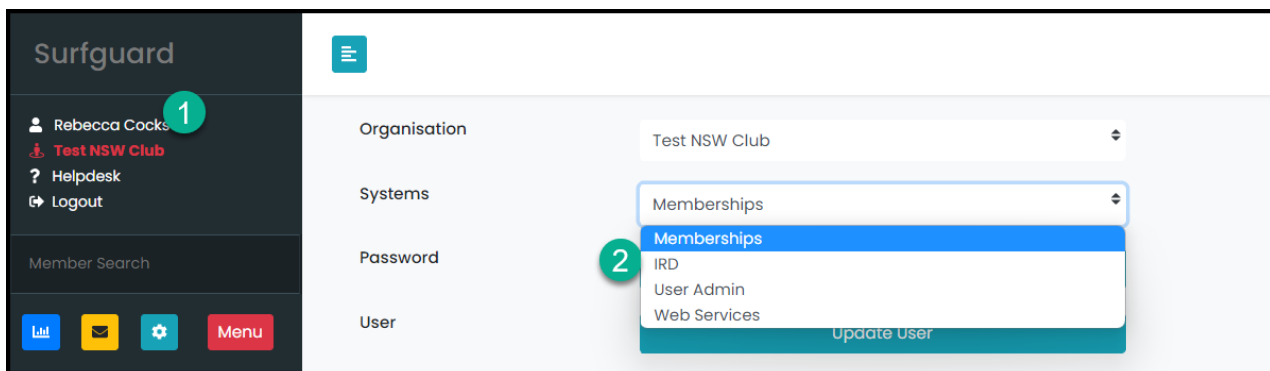
## 4. Patrols

### 4.1 Patrol Logs

All relevant patrol attendance and activity (first aid, rescues etc.) data should be entered as soon as practicable after the last patrolling date.

### 4.2 Incident Reporting Database (IRD)

All Incident Reports should be entered, if not already created via Operations App, into the Incident Reporting Database (IRD) or updated if initially created via SurfCom. Use the "Browse Incidents" menu item to view your recent incident reports, if an incident has been added via SurfCom it will be available to edit using the "Edit" link.



## 5. End of Season Reporting

There are a number of reports that will assist you with statistics for your Annual Report, Below are some of common ones

### a. Total Members in each Sub-Membership Category

Reports > Member - Report Type: Contact Details

Output Format: CSV Style (Excel Format)

Click Advanced Search

Status: Active

Registered Season: (enter current season)

Display Report and download to Excel.

Once downloaded to Excel you can sub-total on change of Sub-Membership Category

### b. List of Awards gained in a Season

Reports > Awards - Report Type: Current Awards

Output Format: CSV Style (Excel Format)

Click Advanced Search

Status: Active

Registered Season: (enter current season)

Award Type: (filter as required depending on the needs of your club, you can display all Award Types or just SLSA Education)

Award Date: 01/07/20... - 30/06/20....

Display Report and download to Excel.

### c. Total Member Patrol Hours

Reports > Patrol - Report Type: Total Member Patrol Hours

Output Format: CSV Style (Excel Format)

Click Advanced Search

Status: Active

Registered Season: (enter current season)

Membership Type – (filter as required)

Organisations Hours type: Lifesaving Hours

Patrol Hours Specifically for Organisation: (leaved ticked if only for your club or untick for all entities patrolled at)

Season Type: (leave as default season or change to Date Range and enter dates)

Display Report and download to Excel.

### d. Patrol Type Hours Report

This report will give you more details about where members have patrolled, the types of hours logged eg Rostered, Makeup, No Shows and the number of hours.

Reports > Patrol - Report Type: Patrol Type Hours

Output Format: CSV Style (Excel Format)

Click Advanced Search

Status: Active

Registered Season: (enter current season)

Membership Type – (filter as required)

Patrol Type – (highlight the Types you wish filter by)

Organisations Hours type: Lifesaving Hours

Season Type: (leave as default season or change to Date Range and enter dates)

Display Report and download to Excel.

## START OF SEASON TASKS CHECKLIST

ACTIVITY		DESCRIPTION	TASK COMPLETE
<b>1</b>	<b>Admin Access to SLS IT Systems</b>		
1.1	Surfguard User Account Report	Check who has an Active Surfguard User account at your club	
1.2	Surfguard Access & SEMS Access	Submit a Form 49 for new club officers/administrators who require access to Surfguard and for Surfguard Users who need to be deactivated.	
1.3	Assign Admin Functions	Clubs can assign members admin functions for News, Events & Library in the Members Area and the ability to purchase patrol uniforms and equipment on behalf of the club.	
<b>2</b>	<b>Memberships</b>		
2.1	Online Membership Renewal	Provide existing members with Online Renewal information.	
2.2	Emailing a Prefilled Membership Form to Members	Prefilled form can be emailed to all Members	
2.3	Printing/Mailing Membership Form	Print Membership forms & create mailing labels	
2.4	New Members	Follow your clubs new Member Application Process	
2.5	Processing Pending Member Requests	Accept or Reject your Pending Requests	
2.6	Payment of Memberships – Renewals & Joining	How to access User Guide for integrated Price List – Surfguard/Members Area/Join	
<b>3</b>	<b>Organisational Management</b>		
3.1	Officer Positions	Add/update & modify Officer Positions	
3.2	Committees	Update and/or add Committees	
3.3	Organisational Details	Check that Organisational Details are current	
3.4	Organisational Bank Account Details	Check that Organisational Bank Account Details are current	
3.5	Service Profile	Update your clubs patrol and other service details for the coming season based on your Patrol Service Agreement	
<b>4.</b>	<b>Patrols</b>		
4.1	Patrol Teams	Update/create Patrol Teams	
4.2	Patrol Rosters	Update/create Patrol Rosters	
4.3	Substitution management	Update default settings as required	



<b>5</b>	<b>Payment Gateway</b>		
5.1	Sign your club up for Payment Gateway	Submit SLSA Forms 075 & 079 to sign up for the Payment Gateway if you have not already done so.	
5.2	Price lists	Update & upload Price Lists	
5.3	How to Update Payment Gateway Details	Check that payment notifications are going to the correct club official e.g. Treasurer, Administrator or Registrar. Submit SLSA Forms 075 to update email addresses for payment notifications, maximum 3 email addresses can be added.	
<b>6</b>	<b>Gear &amp; Equipment</b>		
6.1	Update Gear & Equipment	Add/remove equipment in preparation for Gear Inspections	
6.2	Gear and Equipment Inspections & Checklists	Print out checklists	
<b>7</b>	<b>Additional Activities</b>		
7.1	Beachsafe	Ensure your club and beach details are correct <a href="http://www.beachsafe.org.au">www.beachsafe.org.au</a>	
7.2	Patrol, Water Safety & Sport Event Risk Assessments	All Risk Assessments are now done in the Operations App > Risk Rating	
<b>8</b>	<b>Members Area</b>		
8.1	News and Events	Create & Approve News & Events	
8.2	Document Library	Using the Members Area Library for your Club Documents	

## START OF SEASON TASKS – DETAILED INFORMATION

All clubs need to follow their State’s Standard Operating Procedures when performing ‘start of season’ activities. It is highly recommended that clubs work through the End of Season Checklist to ensure completeness once State processes have been followed.

### 1. Admin Access to SLS IT Systems

A completed Form 049 is required to create new user accounts, amend accounts, reactivate, or deactivate accounts. Please ensure the following section of the Form 49 are completed correctly: -

1. Authorising Officer Details – Executive Committee Members or Staff Members can approve. **NOTE:** Applicants are not able to authorise their own Form 049.
2. User Agreement – must be signed by the person who is having the account created/amended for them.
3. Submit the signed Form 049 via <https://support.sls.com.au>

The Form can be accessed in the following locations:

- Surfguard login page ([www.surfguard.slsa.asn.au](http://www.surfguard.slsa.asn.au)) - in the lower right “Register for an Account”
- SLSA Online Help <https://help.sls.com.au> > Useful Forms

**NOTE:** Some States & Branches process their own Form 49’s. Please email your Form 49 to the following email address if you are an organisation within these States or Branch

Northern Territory – [surf@lifesavingnt.com.au](mailto:surf@lifesavingnt.com.au)

Western Australia - [kstangroom@slswa.com.au](mailto:kstangroom@slswa.com.au)

South Australia - [reception@surflifesavingsa.com.au](mailto:reception@surflifesavingsa.com.au)

Lifesaving Victoria – [lifesavingoperations@lifesavingvictori.com.au](mailto:lifesavingoperations@lifesavingvictori.com.au)

#### 1.1 Surfguard “User Account” Report

Clubs can run a report to find out who has an “Active” Surfguard user account as follows: -

Reports > >Org - Report Type; Users

Output Format; CSV Style

User Status; Active

Display Report

#### 1.2 Surfguard & SEMS Access

Only Club officers and administrators need access to the SLSA National Database, Surfguard. Surf Sports Officers may also require access to SEMS. This access can be requested by a Form 49. Below is a screenshot of the permission levels that will need to be specified by the club for each.

Select One			<input checked="" type="radio"/> New Account	<input type="radio"/> Amend Account	<input type="radio"/> Reactivate Account	<input type="radio"/> Deactivate Account
First Name:		Last Name:				
Officer Position:			Phone: (mobile preferred)			
Email:						
Start Date of Access:		End Date:		No End Date (tick) <input type="checkbox"/>		

<b>Surfguard – Please select ONE of the 3 permission levels below</b>											
1. Full Access – Create/Edit/View <input type="checkbox"/>											
2. Full Access – View Only <input type="checkbox"/>											
3. Custom Access - Tick 1 or more of the following: -											
Members	<input type="checkbox"/>	Assessments	<input type="checkbox"/>	Patrols	<input type="checkbox"/>	Organisational Management	<input type="checkbox"/>	Email/SMS	<input type="checkbox"/>	IRD (Incident Reports)	<input type="checkbox"/>
Please provide additional information if required: -											

<b>Sport Event Management System (SEMS)</b>						
Please select the Administrative function required: -						
<input type="radio"/> <b>Club Officer</b> – allows the operator to register competitors into Events on behalf of a club.						
<input type="radio"/> <b>Recorder</b> – this is for the carnival event recorders at a Branch/State/National level. Enables them to create draws, run rounds, add results and run reports on the event.						
<input type="radio"/> <b>Event Admin</b> – allows users to create events and includes the functions of Officer & Recorder						
<input type="radio"/> <b>Super Admin</b> – this option is only available to SLSA & State Centre staff. Enables access to the core SEMS configuration. Also includes Event Admin function.						

### 1.3 Process for Assigning Administrative Functions in Surfguard

Club administrators/officers can assign the following admin functions via the Officer Positions in Surfguard: -

- Approve Members Area News Content
- Approved Member Area Library Content
- SLSA Online Member Store/Shop Administrator
- Online Form Approver
- **NOTE:** There is now the ability to add an alternate email address for the specific officer role

**View Officers @ Clovelly**

Held Position From:  To:   Format: dd/mm/yyyy

Position Name	Requirement Level	Officer	From	To	Officer Position Options	Officer Options
Administration	National, State, Branch, Club	<a href="#">Cocks, Rebecca</a>	20/07/2020	18/07/2023	<input type="button" value="New"/>	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

**Setup Officer @ Clovelly**

**Allocate Officer**

Officer Position Name: Administration

Officer: \*

From Date: \*

To Date: \*

Use alternate email (Optional) for communication for this officer role. If not selected then communication will default to the officer's personal email which is ithelp@slsa.asn.au

Alternate Email:

Administrative Functions

Approve Members Area News content

Approve Members Area Library content

SLSA Online Member Store/Shop Administrator

Online Form Approver

**NSW Clubs Only** – 3 Officer positions available for Active Kids Voucher Usage – if a person is put in one of these positions, they will be able to run a report in the Members Area for Active Kids Voucher Usage.

**View Officers @ Test NSW Club**

Held Position From:  To:   Format: dd/mm/yyyy

Position Name	Requirement Level	Officer	From	To	Officer Position Options	Officer Options
Active Kids Voucher 1	State, Club	<a href="#">Bee Bumble</a>	06/04/2020	30/06/2021	<input type="button" value="New"/>	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Active Kids Voucher 2	State, Club				<input type="button" value="New"/>	
Active Kids Voucher 3	State, Club				<input type="button" value="New"/>	

## 2. Memberships

Clubs can distribute instructions to existing members about the upcoming season membership renewal process. Outlined below are 3 methods clubs can use to distribute *membership renewal forms*

### 2.1 Online RENEWAL via Members Area for existing Members

Existing Members can renew via the Members Area at <http://members.sls.com.au>. To assist members with creating a Members Area account or getting their login details sent to them, club officers can email members their “Membership Details”

#### Prepare Membership Details Template

In Surfguard > Menu > Maintenance > Templates

1. Click Add New Template
2. Template Type – Membership Details
3. Template Name - Membership Details for Members Area Account
4. Default – Do Not tick at this stage
5. Email Subject - xxxxxx SLSC - Important Information for Membership Renewals
6. Cover Letter Template – Copy & Paste the following and amend as required.

=====  
*[[CurrentDate]]*

*Dear [[MemberFirstName]]*

*RE: [[OrganisationEntityDisplayName]] Renewal for [[NextRegistrationSeason]]*

*All members of [[OrganisationEntityDisplayName]] are required to submit an online renewal form and make payment for the [[NextRegistrationSeason]] season. Please browse to the Members Area at <https://members.sls.com.au> to login and submit your renewal.*

*Below is some information to assist you with accessing your Members Area account.*

*1. Do I have Members Area Account?*

*Your Members Area Username is: [[MembersAreaUserName]]*

*2: I Don't Have a Username OR I Have Forgotten My Password*

*If you don't have a Members Area account or you have forgotten your Password, please use the details below to either create an account or reset your password*

*First Name: [[MemberFirstName]]*

*Last Name: [[MemberSurname]]*

*Date of Birth: [[MemberDOB]]*

*Mobile Phone: [[MemberMobilePhone]]*

*Email Address: [[MemberEmailAddress1]]*

*Membership Renewals are due by (insert date). If you have any questions or need further assistance, please email (insert email address)*

*Kind Regards*

*(Insert Senders Name)*

*(Insert Senders Title)*

*[[OrganisationEntityDisplayName]]*

=====  
**NOTE:** Fields in [[Members First Name]] are inserted form the Insert Details at the bottom of the template

7. Once the details are completed click Save.

## How to Email Membership Details with the Template

### HINT: Send a Test Email to Yourself

Reports > Member - Report Type - Membership Details

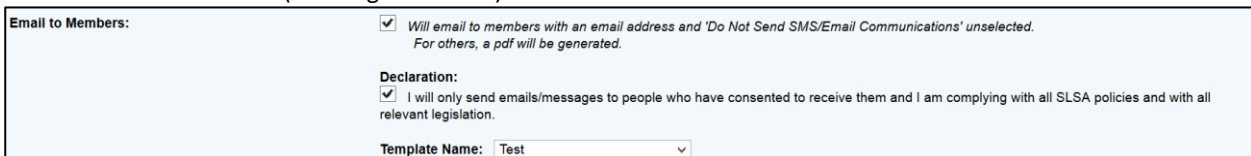
1. Output Format – PDF
2. Click Advanced Search
3. Registered Season – 20....
4. Membership Type – highlight the Membership Categories you want to email to
5. Include Lifesaving Online Account Details (Members Area Account Details) – TICK this box
6. Include State Based Details – make sure this is UNTICKED
7. Email to Members – tick the box
8. Tick box for declaration
9. Template Name – highlight “Membership Details for Members Area Account” - this is the template you just created
10. Email Subject – will prefill from template
11. Print Cover Letter – select Yes
12. Template details will display
13. Include Awards – Untick
14. Include Patrol – Untick
15. Include Notes - Untick
16. Scroll down and Click “Display Report”
17. You will receive a list of the Member ID’s, Name & Email Address of Members the details have been sent to. Any members who has no email or has ticked “Do Not Send Email” will display if you scroll down.

**NOTE:** If a member wants to renew an entire family, the Primary member can create a Members Area account, create a Family Group and renew all members of the family in one transaction. This eliminates the need for every member to have their own Members Area account.

## 2.2 Email Members a prefilled Membership Form

The first step is to amend the ‘Cover Letter’ Template to ensure it has all information your members need to renew their membership e.g preferred renewal method; club contact details; club fees, etc. See Section 2.1 above

- Go to Reports > Member - Report Type = ‘Membership Renewal Form’
- Click ‘Advanced Search’ - Output Format = PDF
- Renewal Season = 2023/2024
- Status = ‘Active’
- Registered Season = 2022
- Tick the ‘Email to members’ Box
- Tick the ‘Declaration’ box (see diagram below)



The screenshot shows a form with the following elements:

- Email to Members:** A checkbox is checked, with the text: "Will email to members with an email address and 'Do Not Send SMS/Email Communications' unselected. For others, a pdf will be generated."
- Declaration:** A checkbox is checked, with the text: "I will only send emails/messages to people who have consented to receive them and I am complying with all SLSA policies and with all relevant legislation."
- Template Name:** A dropdown menu is set to "Test".

- Print Cover Letter: ‘Yes’
- Print Declaration: ‘Yes’
- Print Membership Details: ‘No’
- Tick the Display Report Here Box
- Display report

Surfguard will then produce a report of members that have been emailed their pre-filled membership form and provide you with pre-filled forms for those without email addresses.

The blank SLSA membership form can be found on the Members Area (search “F076” OR “Membership Form”)

## 2.3 Printing & Posting to Members a prefilled SLSA Membership Renewal Form

**Important Note:** If printing forms for all your members, it is highly recommended to break the output up into several smaller groups, as these reports can be large, and you may experience time-out issues. To do this simply narrow your selection by either membership category or with member last names starting ‘a-c’ then another output of members from ‘d-f’. These are only a few examples to assist in narrowing your search.

- Go to Reports > Member > Report Type = 'Membership Renewal Form'
- Output Format = PDF
- Renewal Season = 2023/24
- Status = Active
- Registered Season = 2022
- Print Declaration = Yes
- Print Membership Details = No
- Display Report

#### Printing Mailing Labels

- Go to 'Reports' > 'General Reports' > 'Member Reports'
- Report Type = 'Mailing Labels – Members'
- Output Format = Avery (J8160/L7160)
- Registered Season = 2022

Select 'advanced search' if you wish to refine your label selection criteria or to select 'Unique Addresses' to produce one label per family.

#### 2.4 New Members

New members to the Organisation will need to be directed to <http://sls.com.au/join>, where they submit an online join form as an individual or as a family group. Once the member completes and submits the online application as an individual or for a Family a confirmation window will display that includes the new member's unique tracking ID. The new member will also be sent a confirmation email that includes a link they can use to check the progress of their application. The new member or primary member of a family group will also receive an email asking them to confirm their new Members Area account. The new members application request will display in "Pending Memberships" in Surfguard.

#### 2.5 Processing Pending Member Requests in Surfguard

Administrators need to 'accept' or 'reject' new memberships and membership renewals submitted electronically before any data is updated in Surfguard. To action 'pending requests' in Surfguard go to Members > Pending.

To process Pending Member Requests – **New Club Memberships**:

**NOTE:** new members will not be able to access the SLSA eLearning platform until their new membership pending request has been accepted

- tick the box relating to the member seeking new membership
- click Manually Process/View Request
- check that the correct membership category & registered season has been entered
- click the Save button **OR** close the Form and tick the box next to the member and click Accept Request(s)

To Process Pending Member Requests - **Renew Club Membership**:

- tick the box relating to the member seeking to renew membership
- click Manually Process/View Request
- all changes made by the member will be displayed in 'green'.
- to accept these changes individually click the 'green' tick box alongside the specific change
- to accept all the changes in one go click the 'green' tick box located at the top of the page 'Accept All Member Changes'.
- click the save button.

#### 2.6 Payment of Memberships – Renewals & Joining

For full details on how to create and manage Price List function browse to <https://help.sls.com.au> User Guides > Price List-Surfguard/Members Area/Join

### 3. Organisational Management

#### 3.1 Officer Positions

When your club has held their AGM and elects / re-elects officers to positions within the club, the information needs to be updated in Surfguard. To do this go to Org Management > Officers. This information is used by Branch, State & SLSA to communicate with specific Officers relevant to the position they hold.

**NOTE:** There is now the ability to add an alternate email address for the specific officer role

If an Officer has been re-elected to the same position for another season:

- locate the Officer from the View Officers list
- click the 'edit' button under *Officer Options*
- Amend the 'to date' field
- Add an alternate email if required (Optional)
- Update

If a new Officer has been elected to a position:

- locate the Position Name from the View Officers list
- click the 'new' button under *Officer Options*
- Select the Officer from the drop-down list
- Select a 'From' and 'To' date
- Add an alternate email if required (Optional)
- Save

If you create a new position (synonym) please ensure that you link that position to the existing Surfguard defined position (*Org Management > Officers > Officer Position Synonyms*).

See *Section 1.3 Process for Assigning Administrative Functions in Surfguard* above to assign admin functions to Club Officers,

#### 3.2 Committees

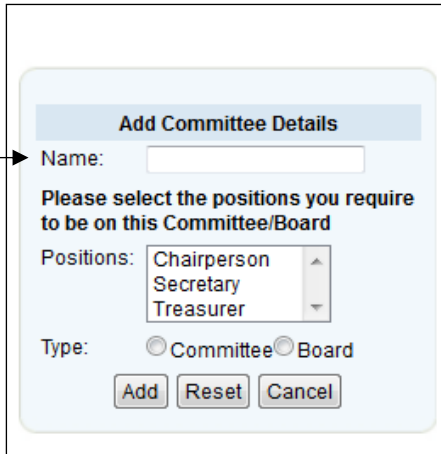
To create a Committee Group in Surfguard:

Go to Menu > Organisational Management > Committees

- Create a name for your Committee
- Select the positions you require to be on the Committee/Board
- Tick whether it is a Committee or Board
- Add

To add members to a committee:

- Click 'Members' adjacent to the committee name you wish to action
- Drag across the members that you wish to add
- Save



#### 3.3 Organisational Details

Check your Organisational Details are accurate and up to date. Details such as Display name, Contact Details, ABN, logos and other club information gets displayed directly from Surfguard to sites such as: SLSA website, Beachsafe, Surfcom, Payment Gateway, etc. and is used by each level of the organisation plus the general public to contact you, so it is important that it remains accurate and up-to-date.

#### 3.4 Organisational Bank Account Details

Check your Organisations Bank Account Details are correct and up to date. Go to Menu > Organisational Management > Bank Account Details then 'Edit' if any changes need to be made.

**NOTE:** If you use the Payment Gateway and have changed your bank account details, see Section 5 of this Circular as additional procedures need to be followed to update your club's bank account details on the Payment Gateway.


### 3.5 Service Profiles

Go to Menu > Organisational Management > Service Profiles to view your club's patrol service details. This information also displays on Beachsafe website and App. The general public can view on Beachsafe when your beach is patrolled. To ensure public safety, it is important that your Service Profile reflects your current patrol service agreement.

## 4. Patrols Teams and Rosters

Once Patrol Teams and Rosters have been confirmed they can be entered into SurfGuard. One-off patrols can be entered as an 'Unrostered Patrol' eg Christmas Day Patrol.

### 4.1 Patrol Teams



Team Name	Actions
1 - Kevin Quinn Patrol Team	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Members</a> <a href="#">Roster</a>
2 - John Dynan Patrol Team	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Members</a> <a href="#">Roster</a>

#### Editing Patrol Teams

Editing existing patrol teams does not change any of the data already saved in previous Patrol Logs

#### Creating A New Patrol Team

To create a team go to Patrols > Teams > Add a Patrol Team.  
Type in the name of your new patrol team and save.

#### Assigning Members to a new Patrol Team:

Patrols > Teams > Click "Members" under Actions > Click Add Team Members  
Select or remove team members as appropriate and Save

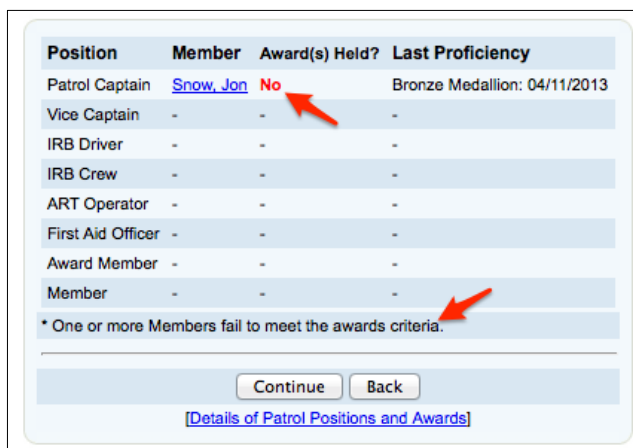
The system will display your patrol team together with their award information

#### Multiple Positions in a Patrol Team

Avoid entering members in several positions (e.g. do not enter a member as both "First Aid Officer" and "Member") as this will create extra entries in the Log.

#### Award/Proficiency Requirements for Members in A Patrol Team

States are responsible for the setup of Award/Proficiency requirements for all positions in a patrol team. Some States enforce the Award/Proficiency requirement for specific positions and if it is enforced a member cannot be added to a specific position if they don't meet the Award/Proficiency requirements. For States that do not enforce the Award/Proficiency requirements SurfGuard provides a **warning** if a member does not hold the appropriate Award/s or the Award is not proficient. A **'No'** displays in the Team Member's display. If a **'No'** displays next to any members name, the Club officer/administrator should do further investigation to determine why. They can do this by clicking **"Details of Patrol Positions and Awards"** at the bottom of the screen. This will show the required Awards for each patrol position, set by the State Centre.



Position	Member	Award(s) Held?	Last Proficiency
Patrol Captain	<a href="#">Snow, Jon</a>	No	Bronze Medallion: 04/11/2013
Vice Captain	-	-	-
IRB Driver	-	-	-
IRB Crew	-	-	-
ART Operator	-	-	-
First Aid Officer	-	-	-
Award Member	-	-	-
Member	-	-	-

\* One or more Members fail to meet the awards criteria.

[Continue](#) [Back](#)

[\[Details of Patrol Positions and Awards\]](#)



## 4.2 Patrol Rosters

### To add patrol roster to a patrol team

Patrols > Teams > Find the team and click "Roster" under Actions

- Select dates that the patrol team has been rostered (you can filter this to only display weekend days)
- Select the times for each rostered date
- Click 'Add' and the patrol team's roster will display on the right-hand side of the screen.

## 4.3 Patrol Swaps/Substitutions

The Patrol Swap/Sub function can be managed by patrolling members via their Members Area account. Members can create a sub request and the request will display to members who are eligible to sub for the member. For further information on Patrol Swaps/Subs go <https://help.sls.com.au> > Members Area User Guide > Patrol Swaps.

Club officers/administrators are able to manage Patrol Sub/Swaps in three sections of Surfguard:-

1. Menu > Maintenance > Substitution Maintenance
2. Menu > Patrols > Substitute Management
3. Patrols > Logs

For further information Club Officers/Administrators can browse to <https://help.sls.com.au> Surfguard Manual > Surfguard Users – Clubs > Patrol Swaps.

## 5. Payment Gateway

The SLSA Payment Gateway (<http://pay.slsa.com.au>) is a secure online payment system managed by Westpac. Clubs must register for the Payment Gateway to enable members to pay their membership fees when renewing via Members Area. For transactions made through the Members Area, Surfguard records the payment details under the Transaction section of a member's Surfguard account.

### 5.1 Sign your club up for the Payment Gateway

SLSA recommends that all Clubs use this facility to make the collection of any payment to your club efficient and easy for your members. To enable the SLSA IT Department to setup your account please follow these simple steps:

- Enter your club's Bank Account details in the Organisational Details area of Surfguard
- Fill out the Form 79 - Direct Debit Request Form and the Form 75 – Bank details Information Form
- Send Form 75 and 79 to SLSA IT Department via <https://support.sls.com.au>

The Forms can be found at SLSA Online Help <https://help.sls.com.au> > Useful Forms. If you need any more information regarding the Payment Gateway, contact the Helpdesk <https://support.sls.com.au>

### 5.2 Update/Upload Payment Gateway Price List

Instructions on how to upload a Price List are in the SLSA Payment Gateway User Guide. The guide can be viewed at <https://help.sls.com.au> under Payment Gateway. **NOTE:** the Price List needs to be created in a set format.

### 5.3 Update your club's details on the Payment Gateway

If your club has a Payment Gateway account and your bank account details have changed or your club is not receiving payment notification emails. you must complete a Form 075. The form can be downloaded from SLSA Online Help <https://help.sls.com.au> > Useful Forms **Note:** Up to three (3) club officers can receive payment notifications.

## 6. Gear and Equipment

### 6.1 Update Gear and Equipment lists

Ensure any new Gear and Equipment has been entered into Surfguard and delete any equipment that has been decommissioned. Gear and equipment can be accessed via Organisational Management > Manage Gear & Equipment.

### 6.2 Gear and Equipment Inspections & Checklists

To access go to Organisational Management > Gear. Once your club has checked that all gear and equipment is recorded in Surfguard checklists can be printed. To print off pre-filled gear and equipment checklists, use the 'Print checklist' button next to your gear and equipment categories.

## 7 Additional Activities

### 7.1 Beachsafe

Go to [www.beachsafe.org.au](http://www.beachsafe.org.au) and click all the tabs to ensure your Club/Beach details are up to date. As previously advised, Beachsafe gets information from the 'Organisational Details' tab in SurfGuard. Information also comes from ABSAMP (Australian Beach Safety and Management Program). Contact your State Centre if information, other than the details in Organisational Details, need updating.

### 7.2 Patrol, Water Safety & Sport Event Risk Assessments

Members who needs to assess Risk at an aquatic activity needs to complete an online eLearning course called SLS-Surf Risk Rating. The course is Free

**How to Access:** Members Area > eLearning > My Training Library > **SLS-Surf Risk Rating** > View Courses > Click Enrol.

Once you have completed the eLearning you will be allocated the **SRR App Access award** within the week and this will give you access to the Risk Rating module in the Operations App. The Operations App can be downloaded from the App or GooglePlay store - search 'SLSA Operations App. Log in details for the Operations app are the same as your Members Area log in.

## 8. Members Area (<https://members.sls.com.au>)

### 8.1 News and Events

The Members Area allows Members, Clubs, Branches, State and National Levels of the organisation to post information relating to News and Events. Any Member who has a Members Area account can create articles ("content") for New & Events. Club Officer/ Administrators who have been assigned admin functions need to check regularly if there are any items waiting approval. In the Members Area from the News and Events drop down select Manage News & Events.

### 8.2 Document Library

The Members Area Document Library could be used to provide information to your club members. Examples of documents you could upload: -

- Club Constitution, By-Laws, Rules and Regulations
- Non-confidential minutes and information
- Your patrol handbook, Service agreement, SOP' or Annual Reports & Newsletters

For information on how to add library content in the Members Area browse <https://help.sls.com.au>, Members Area Guide