



User guide:how to search for an Activity or Nights Away Permit Holder

Roles: All adult members.

Process overview: This process allows a member to search for a permit holder for any activity, including Nights Away. The member can search by the activity, the category of the permit (eg B2 Waters), and the type of permit (eg supervisory). The member can also choose to search within a particular location (eg a specific County or District). Additional search parameters can also be included (eg 'valid to' dates) to help identify the most appropriate permit holder.

The search will return all members of Scouting who have the relevant permit within the location searched. This will allow the member to contact one or more permit holders. The degree of information available is dependent on whether the permit holder is visible to the member. The member can send a message (email, Compass alert, SMS text or any combination of the three) to the selected permit holder(s) using the Compass system, or can export the results.

If you are a permit holder and happy to be contacted via Compass please ensure that your email address and/or your phone number is visible outside your hierarchy. See the user guide for [Editing your visibility](#) for instructions on how to do this.

This search functionality helps you to find people who hold particular permits. However, please remember that it is your responsibility to ensure that anyone leading an activity has the appropriate permit or qualifications to do so, in relation to the activity rules in POR Chapter 9. Before engaging a permit holder, you need to check that their permit, including any restrictions, is appropriate for the activity that you have planned. Depending on an individual's visibility settings, you may be able to check this on Compass, or you may need to contact the permit holder directly for details.

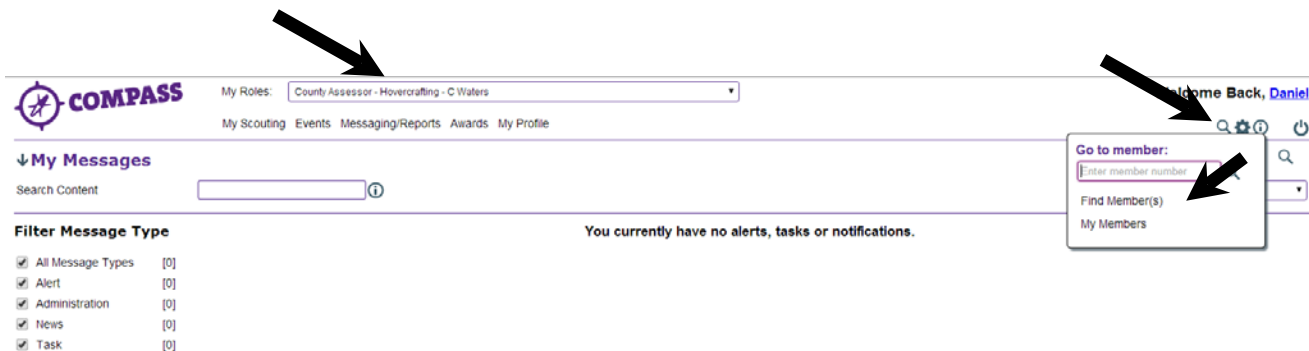
Please note: There are some known issues with search results for certain activities. Please read the notes contained here ([Results displayed for searches to find Activity Assessors, Nights Away Advisers and Permit Holders](#)) for more information, and check carefully before contacting people. This applies to:

- Kayaking and canoeing.
- Hillwalking and mountain biking.
- Nights Away.
- Climbing and abseiling.
- Ice climbing.

Process:how to search for a permit holder

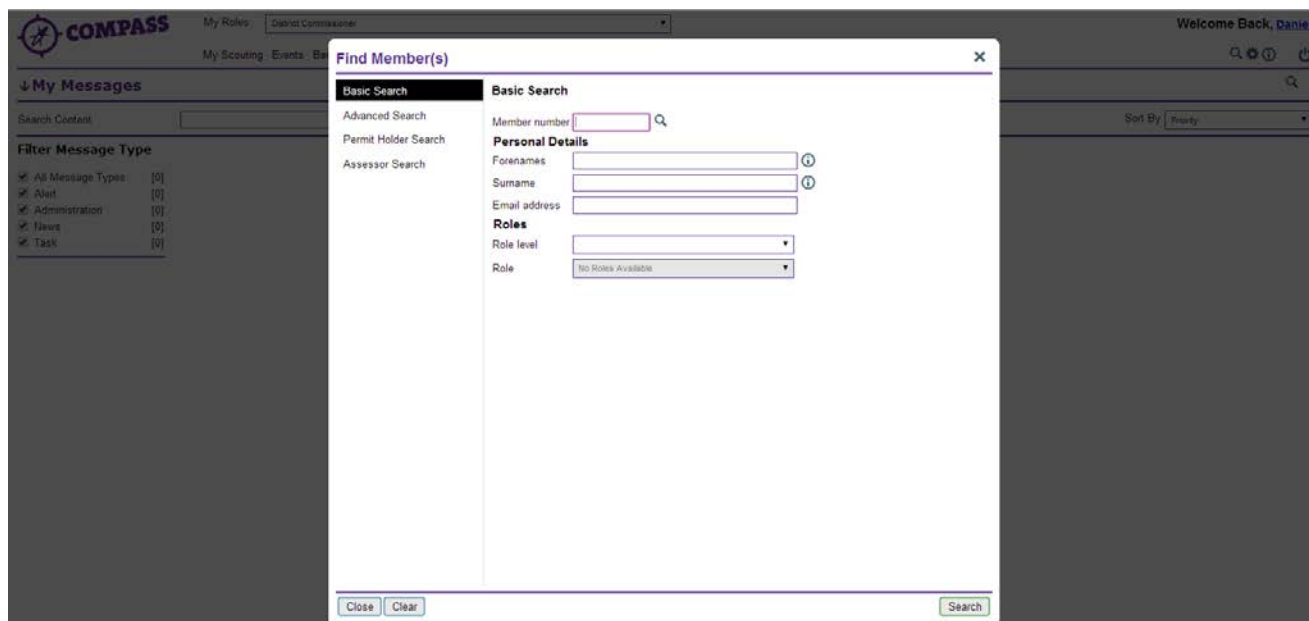
- 1 After you have logged into Compass, hover over the 'Available search options' button (this looks like a magnifying glass) to bring up the search menu. Select 'Find member(s)'.

Please Note: What you are able to see in your search results will depend on the role that you currently have



selected in the 'My roles' box.

- 2 This will open a new pop-up window with a menu on the left hand side. From this menu, select 'Permit holder search' to view the search form.



- 3 The 'Permit holder search' form will allow you to search using different criteria. Select your required search criteria and click on the 'Search' button at the bottom right hand corner of the form. You can enter as much or as little information as you wish. The more you enter, the more refined your search will be.

The criteria are as follows:

- **Activity**–This dropdown menu lists the main activities within Scouting that need a permit, for example 'Bell Boating'.
- **Category** – This dropdown menu is used to search for specific categories within an activity permit. For example, 'Bell Boating' contains the categories 'B1 Water' and 'B2+ Waters'. (Note that the search will return all permit holders at and above the selected level, for example, if 'B1 Water' is selected, the search will return anyone who can operate on B1 waters, including people who hold a B2+ Waters permit.)
- **Type** – This dropdown menu allows you to search for the following options: 'Leadership' and 'Supervisory' permit holders. If searching for Nights Away permit holders you need to choose the 'Supervisory' type, no results will be returned if you choose 'Leadership'.
- **Expires before** – This allows you to find permit holders with permits expiring before a certain date.
- **Expires after** – This allows you to find permit holders with permits expiring after a certain date.
- **Location** – This section allows you to choose permit holders within specific Counties and Districts.
- **Assessor member number** – This allows you to find people whose permits have been recommended by a specific Assessor using the Assessor's membership number, or name and surname.
- **External Assessor name** – This allows you to find people whose permits have been recommended by a specific external Assessor.
- **Granting Commissioner** – This allows you to search for people whose permits have been granted by a specific Commissioner.

Please note: If you happen to enter criteria that the system does not recognise, or if there are no search results to show, a message will appear to 'Please refine your search parameters and try again'.

4 The search results will be returned as a table.

Names of permit holders within your hierarchy, or of those who have chosen to make themselves visible outside of their normal area of Scouting, will be in blue text and underlined.

Names of permit holders outside of your hierarchy, or who have not made themselves visible to you, will be displayed in black text.

If you wish to change or refine your search, click on the 'Amend search' button to go back to step 3.

COMPASS My Roles: County Commissioner Welcome Back, Ade

My Scouting Joining Training Messaging/Reports My Profile

Search Results (199 Records Found)

You searched for

Search Type: Permit Holder Search
 Permit Activity: Climbing and Abselling
 Permit Category: Natural Top Rope
 Type: Leadership
 Location: England

<input checked="" type="checkbox"/>	▽ Name	▽ Activity	▽ Category	▽ Type	▽ Expiry	▽ County [Location]	▽ District
<input checked="" type="checkbox"/>	Adam David Godwin	Climbing and Abselling	Natural Top Rope	Leadership	20 Mar 2016	Norfolk	
<input checked="" type="checkbox"/>	Adam David Godwin	Climbing and Abselling	Natural Top Rope	Leadership	20 Mar 2016	Norfolk	Southern Norfolk
<input checked="" type="checkbox"/>	Adam David Osborne	Climbing and Abselling	Lead Climbing	Leadership	18 Feb 2017	Norfolk	Northern Norwich
<input checked="" type="checkbox"/>	<u>Adam David Wilson</u>	Climbing and Abselling	Lead Climbing	Leadership	01 Feb 2017	Durham	Chester-le-street
<input checked="" type="checkbox"/>	Alan David Miles	Climbing and Abselling	Lead Climbing	Leadership	30 Dec 2019	Staffordshire	Stafford.
<input checked="" type="checkbox"/>	Alexander Michael Glass	Climbing and Abselling	Lead Climbing	Leadership	30 Sep 2016	Avon	Wansdyke
<input checked="" type="checkbox"/>	Alexander Sinclair Stewart Roddie	Climbing and Abselling	Natural Top Rope	Leadership	08 Nov 2019	Lincolnshire	Skegness Spilsby And District
<input checked="" type="checkbox"/>	Amanda Dawn Wilson	Climbing and Abselling	Lead Climbing	Leadership	25 Jun 2017	Durham	Teesdale
<input checked="" type="checkbox"/>	Amy Elizabeth Shelley	Climbing and Abselling	Natural Top Rope	Leadership	31 Aug 2019	Hertfordshire	Hemel Hempstead
<input checked="" type="checkbox"/>	Andrew Brown	Climbing and Abselling	Lead Climbing	Leadership	27 Mar 2019	Durham	
<input checked="" type="checkbox"/>	Andrew Brown	Climbing and Abselling	Lead Climbing	Leadership	27 Mar 2019	Durham	Chester-le-street
<input checked="" type="checkbox"/>	Andrew Deville	Climbing and Abselling	Lead Climbing	Leadership	22 Nov 2015	North Yorkshire	
<input checked="" type="checkbox"/>	Andrew Deville	Climbing and Abselling	Lead Climbing	Leadership	22 Nov 2015	North Yorkshire	South Craven
<input checked="" type="checkbox"/>	Andrew David Bradley	Climbing and Abselling	Lead Climbing	Leadership	14 Mar 2017	Gt. Manchester West	Stretford
<input checked="" type="checkbox"/>	Andrew Gareth Dolan	Climbing and Abselling	Lead Climbing	Leadership	15 Sep 2018	Surrey	Woking

Messaging Export Options Amend Search

5 You can send a message to all those listed in the permit search, including permit holders listed in black text.

- Using the tick boxes at the left hand side, select the permit holders you wish to message, and then click on the 'Messaging' button. You can then send a message using email, Compass alert, SMS text message or any combination of the three.

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Messaging Export Options Amend Search

- b. Complete the message details including the subject, message type (email/Compass alert/SMS (text)), message body, and any attachments (if sending by email).

If you are sending an email, your name and the main email address on your Compass record will be shown as the sender. If you are sending a Compass alert or an SMS (text) message, your details are not automatically included as the sender so the recipient will not know who sent it unless you include this information in the body of the message.

Click 'Preview message and send' to preview your message before sending.

- c. Check your message, and click 'Send' to send, or select 'Edit message' to make any amends.

Click on 'Back to results' at the bottom left of the screen to return to your search results. (Using your browser's back button will not return you to your search results.)

6 Clicking on the name of a permit holder highlighted in blue will take you to their profile.

If you are normally able to access their profile (eg because they are in your hierarchy) you will be shown the list of permits they hold. Below the permit holder’s name, you will see a table with the following categories: ‘Activity’, ‘Category’, ‘Type’, ‘Restrictions’, and ‘Expires’. You may see ‘Options’ buttons depending on your role in relation to the person that you are viewing. You may also be able to click on the activity title (blue and underlined) to see further details about that permit.

Click on ‘Personal details’ to view the permit holder’s contact information.

Activity	Category	Type	Restrictions	Expires	Options
Bell Boating	B2+ Waters	Leadership	Use only on Monday.	11 March 2016	
Hill Walking	Terrain 2 Summer	Supervisory	In England only	01 March 2018	
Mountain Biking	Terrain 2 Winter	Supervisory	Only red bikes allowed	21 March 2015	

If you are viewing a permit holder who is normally outside of your area of Scouting, but who has chosen to make themselves visible to others, you will be taken directly to their personal details page. Only those details they have chosen to share will be visible to you. You may be able to see their list of permits; however, you may not be able to do this if they have not chosen to share that list.

Personal Details

Certain information is only visible to members viewing their own profile

Name: Miss Catherine Alexandra Jones
 Member No: 736331
 Date of Joining: Unknown
 Gender: Female

Contact Details

Address Main Home: ABCDEhe Avenue. ABCDEn, 115 The Avenue. E4 9RX UK

Phone Unspecified (main): TEST.ABCD812621
 Unspecified: TEST.ABCD812621

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7 This completes the procedure for the ‘Permits – How to find a permit holder’. To search for a new permit holder click on the ‘Available search options’ button in step 1. To return to the homepage, click on the ‘Compass’ logo at the top left of the page.