



User guide: Adding an adult member

Roles: Appointment Secretaries, Administrators, Commissioners, Group Scout Leaders

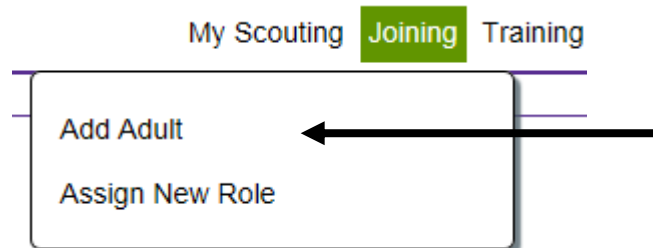
Process overview: This process will allow users with the correct access rights to add Adult Members to the system and to assign roles to them. The outcome of the process is that the user will be able to add new Adult Members and start the Appointment Process. The following initial information will be needed:

- Full Name, Address, Date of Birth and Join Date
- Contact Number
- Email Address

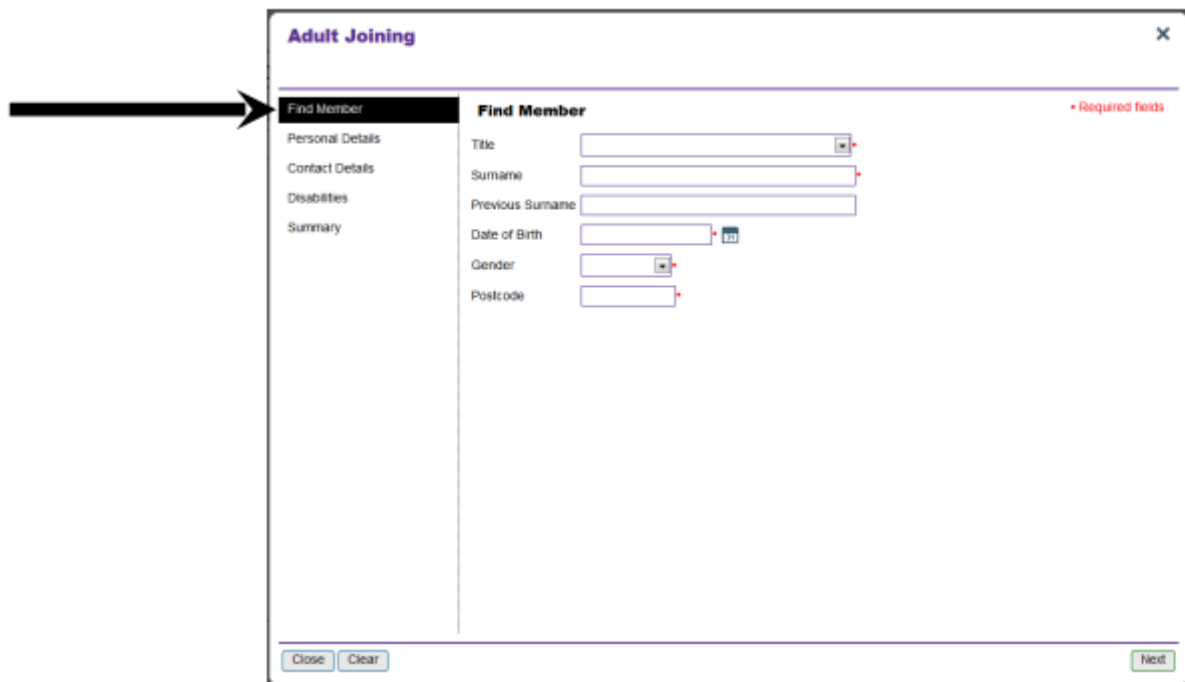
Process: adding an adult member

Ensure you have the correct role selected from the My Roles selector at the top of the page. (This will be the role that gives you the appropriate access rights to complete this process.)

- 1 Click the 'Joining' heading towards the top of the homepage.
- 2 A menu will appear under the 'Joining' heading. Click 'Add Adult'.



- 3 A popup box will appear titled 'Adult Joining'. There will be a list of options on the left hand side. Make sure 'Find Member' is highlighted. If not, click on it.



The image shows a popup window titled 'Adult Joining' with a close button (X) in the top right corner. On the left side, there is a vertical list of options: 'Find Member', 'Personal Details', 'Contact Details', 'Disabilities', and 'Summary'. The 'Find Member' option is highlighted with a black background. A black arrow points from the left towards this option. The main content area is titled 'Find Member' and contains several input fields with red arrows indicating required fields: 'Title', 'Surname', 'Previous Surname', 'Date of Birth' (with a calendar icon), 'Gender', and 'Postcode'. A red dot next to the 'Required fields' text indicates that these fields are mandatory. At the bottom of the popup, there are 'Close' and 'Clear' buttons on the left, and a 'Next' button on the right.

- 4 In the 'Find Member' section enter the person's title, surname, date of birth, gender and postcode in the boxes provided and then click 'Next' at the bottom right of the window.

The screenshot shows a window titled "Adult Joining" with a close button (X) in the top right corner. On the left is a sidebar with menu items: "Find Member" (highlighted), "Personal Details", "Contact Details", "Disabilities", and "Summary". The main area is titled "Find Member" and contains a form with the following fields: "Title" (dropdown), "Surname" (text), "Previous Surname" (text), "Date of Birth" (calendar icon), "Gender" (dropdown), and "Postcode" (text). A red asterisk and the text "Required fields" are visible in the top right of the form area. At the bottom left are "Close" and "Clear" buttons. At the bottom right is a "Next" button, which is pointed to by a large black arrow.

- 5 You will be presented with two options; click 'Add New Person'.

The screenshot shows the same "Adult Joining" window, but now the "Find Member" sidebar item is not highlighted. The main area is titled "Possible Matches" and contains the sub-header "Possible Matches (No Records Found)". Below this, the text reads: "You may wish to: Refine your search parameters and try again. - or - Alternatively, add a new person." To the right of this text are two buttons: "Search Again" and "Add New Person". At the bottom left of the window are "Previous" and "Close" buttons. At the bottom right is a "Next (No matches above)" button.

- 6 This will take you to the 'Personal Details' page. Here, you will need to enter the new Member's information including their forename(s) and date of joining. You will also be able to enter other details such as the person's occupation. When complete click 'Next' at the bottom right.

The screenshot shows the 'Adult Joining' form with the 'Personal Details' section active. The form includes fields for Membership No, Title (Mr), Gender (Male), Forename(s), Surname (Dane), Known As, Ethnicity, Date of Birth (03 April 1985), Date of Joining, Honours (with an 'Add' button), Occupation, Occupation Detail, and Gift Aid? (checkbox). A red asterisk indicates required fields. A 'Next' button is at the bottom right, and 'Previous', 'Close', and 'Clear' buttons are at the bottom left. Two black arrows point to the 'Next' button and the 'Required fields' label.

- 7 On the following page you will need to enter the new Member's contact details. These include a home address, contact number and email address.

For UK addresses you must use the valid UK postcode format with spaces (eg E4 7QW.) If the Member you are adding lives in a country that does not use postcodes, use 'NOPCODE'. Clicking the magnifying glass icon next to the postcode box will provide you with a list of addresses linked to that postcode. Click 'Select' for the address you want to use, which will then fill in the address boxes automatically. Once complete, click 'Next' at the bottom right to move on.

The screenshot shows the 'Adult Joining' form with the 'Contact Details' section active. The form is divided into several sub-sections: 'Home Address' (Postcode: E4 7QW, Address, Town, County, Postcode, Country), 'Mailing Preferences' (TSA Mail, TSA Subsidiary Mail), 'Email Addresses' (3 rows with Primary? checkboxes), 'Telephone Numbers' (3 rows with Primary? checkboxes), and 'Social Media' (3 rows). A red asterisk indicates required fields. A 'Next' button is at the bottom right, and 'Previous', 'Close', and 'Clear' buttons are at the bottom left. A black arrow points to the 'Next' button.

- 8 The following page will let you add details of any additional needs or disabilities. The drop down menu can be used to add the relevant additional need or disability, and any extra information can be added by typing into the 'Details' box.
- 9 The 'Summary' page will display all the information provided within each section under the relevant section heading. If you want to change any of the information within a particular section, click the 'Edit' button next to the section name.

When you are ready to add the Adult Member, click the 'Save and Add New Role' button at the bottom right of the window.

The screenshot shows a web interface titled "Adult Joining" for a member named "Jake Demo". On the left is a navigation menu with options: "Find Member", "Personal Details", "Contact Details", "Disabilities", and "Summary" (which is highlighted). The main content area is divided into sections: "Personal Details" (Name: Mr Jake Demo, Date of Birth / Gender / Ethnicity: 03 April 1985 / Male, Honours, Occupation, Gift Aid: NO), "Contact Details" (Current Address: The Scout Association, Cavell Park, LONDON, E4 7QW, UNITED KINGDOM; Telephone: 12245678 (Daytime) - MAIN; Email: test@test.com (Home) - MAIN; Mailings: TBA Mail: NO / TBA Subsidiary Mail: NO), "Special Needs", "Qualifications & Skills", and "Hobbies & Interests". Each section has an "Edit" button. At the bottom right, there is a "Save and Add New Role" button, which is pointed to by a black arrow. A "Close" button is at the bottom left.

- 10 A pop up window will appear asking you to confirm that permission was given for The Scout Association to hold the information provided. Click 'OK' to continue adding the Member.

The dialog box has a title "Before you finish" and contains the text: "By selecting OK you are confirming that permission has been given to hold this information." Below this is a blue hyperlink: "[Read about your data protection responsibilities here.](#)". At the bottom are two buttons: "OK" and "Cancel". A black arrow points to the "OK" button.

11 The 'Assign New Member Role' screen will automatically appear. Please refer to the [Adding a New Role to an Adult Member](#) user guide, from page 4 onwards.

Please note: If a Member role is not assigned at this point and you leave this screen, you will not be able to find the Member again, as they will not have a role in your hierarchy.