# How to add an adult Member and how to assign someone a new role: Video Transcript

In this video we are going to look at how to add an adult Member and how to assign a new role to that person.

The process of adding a role to an existing, active Member is essentially the same, it just starts slightly differently. Rather than needing to add the person first, you start by either selecting ‘assign new role’ from the joining menu; or by searching for the Member, then going to their roles page and clicking on ‘New Role’. Help and guidance on how to complete this can be found on the [Compass Support site](http://compasssupport.scouts.org.uk/?page_id=59542).

The process from there on is same as will be shown in this video, once we have added our new Member and moved to assigning a new role to them.

Before starting to add a new Member, make sure you have the following information to hand about the person or the role: their full name, address and date of birth; a contact telephone number and email address; and you’ll also need their Role title, location and start date.

Make sure you’ve selected the right role for the task in the ‘My Role’ dropdown menu at the top of the page.

Then click on ‘Adult Joining’. There are two options here, ‘Add Adult’ or ‘Assign New Role’.

Click on ‘Add Adult’.

The ‘Adult Joining’ popup box will appear.

Fill in the relevant details of the person you want to search for.

When you’re happy, click the ‘Next’ button.

A new page will appear called ‘Possible Matches’.

If the person you are trying to add already has an active role, or they already have a record because they had a role in the past then they will appear listed on the page. If this is the case click the ‘Select’ button for the relevant person.

If there are existing records which have some similar details, for example the same surname and date of birth, then they may also appear. If they are not the correct person then click ‘Next (No matches above)’.

If the person is new to Scouting there will be no matches found. Click on ‘Add New Person’ or ‘Next (No Matches Above)’.

Work through the various pages, filling in the relevant details. As you go through, you’ll notice some fields have a red dot next to them which means they are mandatory and cannot be left blank. Information which is not mandatory can be left blank if needed, and filled in later when the record is set up.

If you had selected an existing record from the ‘Possible Matches’ page, then you will be taken through the same pages, but they will be pre-populated with some information. It is important that you check these details carefully, and edit them as you go through if needed.

Carefully check all the information entered is correct.

This is particularly important for personal details, as these need to be identical to the person’s ID documents to do a disclosure check, if this is required. Details like title can only be changed by HQ, so if you are not sure check before you add these in.

If any of the details are wrong, click the ‘Edit’ button next to the relevant field. When updated, click ‘Back To Summary’.

When all information has been entered and you’re happy, click ‘Save and Add New Role’. Then, click ‘Yes’ in the popup box which appears.

If you are just adding a new role to an existing Member, rather than adding the Member first, the process will be the same from here onwards.

Fill out the details, starting with the drop down boxes to select the location of the role. As before, any fields with a red dot are mandatory and cannot be left blank.

Depending on your role some location boxes will already have been filled in and you won’t be able to change these.

If you’re adding an Occasional Helper, they can only be added at Group level and not to a specific Section. Therefore, don’t select any Sections from the drop down menu, only the Group.

Also, because they are a Group level role, they can only be added by other Group level roles and upwards in the hierarchy, for example a Group Scout Leader.

Type in a start date for the role, or select it using the calendar icon.

If you’re adding a role to a Member who has just turned 18, the start date for their role cannot be before their 18th birthday.

Double check the details you’ve entered to make sure they’re correct and when you’re happy, click ‘Save’.

You’ll then be taken to the ‘Roles’ page of the Members new record. Make sure that you make a note of the person’s Membership number. Among other things, this will make it much easier to find them again in Compass.

This concludes the video on how to add a Member and how to assign a role to them. Further guidance can be found on the [Compass support site](http://compasssupport.scouts.org.uk/?page_id=59542), including how to update the role as part of the appointments process.