# How to administer and approve a role for an adult Member: Video Transcript

We’re going to look at how to approve and administer an adult member’s pre-provisional or provisional role as they progress through the Appointment Process.

Although we are showing it all in one go, in reality there will lapses in time between completing different stages, as you may need to wait for tasks to be completed locally by different people. E.g. Appointments Advisory Committee Approval being received or references returned.

The timescales for these events taking place are the same as they were pre-Compass and further guidance can be found on Member Resources.

For many appointments, in order to make the role full, the Getting Started training needs to have been validated This can only be done by relevant training roles, so you will need to liaise with them to ensure that this training has been completed and validated locally.

Before you start, make sure you have selected the right role for the task from the ‘My Role’ dropdown at the top of the page.

First you need to go the record of the Member whose role you want to edit.

To do this, you can search using their Membership number or, if you don’t know this, use the basic or advanced search options. More guidance on searching can be found on the Compass Support site.

Once you’ve reached the Member’s record, click on the ‘Roles’ tab.

Click ‘Edit’ next to the role that you want to administer.

The ‘Edit Member Role’ popup box will appear

The menu down the left hand side lists the pages which are available to edit. If you know which specific page you want to go to, click on the name.

If not you can work through each page in turn by clicking next, which is what we’re going to do now.

The first page shows you the ‘New Role Details’. On here you can edit the start date of the role and input an end date if the role is historical. If the role has a variant (such as the specific Section for a Section Leader) you will be able to use the Role Variant drop down menu to change this.

You won’t be able to change any of the other details such as the role itself or the location. If these are incorrect you will need to cancel the role by entering an end date into the box, and adding the correct role before proceeding.

When you’re happy, click ‘Next’.

This will take you to the ‘Approval’ page.

Here you can assign a line manager for the role. The box should automatically show the local line manager, however if there are multiple options, choose who to assign from the drop down box. Make sure that both the line manager, and the member you are appointing are aware of this ahead of time.

If this box is greyed out then there is currently no line manager recorded on Compass for this role. This will update automatically once the line manager role is added to someone’s record on Compass.

You can also add a date for when the appointment review is due.

The next section on this page is ‘Approval’. Here you can see and edit information such as the status of references. Use the drop down menu for each Approval option to update the status; once this has been received from the relevant person.

The information in this section will vary depending on the role that you are editing. If a disclosure is required for the role and the Member already has a valid disclosure, the date it was issued will be displayed. If the member does not yet have a disclosure, or it has expired, it will say ‘no disclosures’.

If you need guidance on how to request a disclosure this can be found on the Compass Support site. Please note, this covers England and Wales only. Those in Scotland, Northern Ireland, or overseas should contact their Country HQ for more information on processes locally, or contact the UKHQ vetting team via the Info Centre.

If the role requires Getting Started training to be completed to become full, there will be a third section called ‘Getting Started Modules’. This will show a list of the relevant modules for the role, at the bottom of the page.

These boxes can only be updated by those who hold a relevant training role. They can do this by validating the modules on this page or directly on the ‘Training’ page of the Members record.

Click the ‘Next’ button to move to the next page.

The ‘References’ page will open. This is split into two sections, one for each reference. The process is the same for each.

Enter the relevant information into each of the boxes including the name, email address and respond by date for each referee. The respond by date is the deadline you have requested the reference be returned by. If you’d prefer, or is the referee doesn’t have an email address you can still use the paper reference form (which you can order from Scout Shops or download from Member Resources.) You will then need to update the outcome on Compass.

Once you’ve entered this information, you will be able to send an email to request each reference.

If you want to see an example of a reference request before you send it, so you can see what will be sent out, click the ‘see example of reference button’ under the ‘Email Options’ heading.

When you’re happy and want to send the reference, click the ‘Send email requesting reference button’.

Once you have clicked the send button, a message will appear in its place telling you that you will need to click the ‘Save’ button before the reference email will be sent.

Click ‘Save’. You will be returned to the Member’s ‘Roles’ page.

Once a satisfactory reference has been returned, return to the Member’s record and click ‘Edit’ again next to the relevant role.

Return to the ‘Referees’ page.

Place the date you received each reference back into the ‘Response Received’ box, typing directly or using the date selector.

Then, back to the Approvals page and change the references field to ‘References Satisfactory’.

Check the details are correct and when you’re ready to save the edits you have made, click the ‘Save’ button.

You will be returned to the Member’s ‘Role’ page.

If all sections of the approval have now been completed by the relevant people, the role will become full. Check the Compass support site for guidance on processes you may now need to complete for recently appointed members.