Circular 204:04:14

To: SurfGuard Registrars  
   Club Secretaries  
Cc: Club Presidents  
   Club Captains  
   Chief Instructors  
   Club Treasurers  

From: Shelley Snow – Volunteer Support Officer  

Date: 2 April 2014  

Subject: End of Season SurfGuard Procedures  

Action: Complete end of season SurfGuard procedures as instructed  

For additional details on this Circular please contact:  
Lifesaving Operations on 03 9676 6930 or email lifesavingoperations@lifesavingvictoria.com.au  
Circulars are available at www.lifesavingvictoria.com.au/circulars  

Should you require assistance completing the end of season SurfGuard Procedures, please contact your Club’s Volunteer Support Officer:  

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This circular is designed to assist Club & Surfguard Administrators to ensure that membership and related data is current and ready for the close of the season.

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 following check box list. This circular also provides an expanded explanation on each activity listed within the check box should you require further reference, and some pre-season IT activities that you may also want to perform.

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<th>END OF SEASON CHECK-LIST</th>
<th>ACTIVITY DESCRIPTION</th>
<th>TASK COMPLETE</th>
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<td>1.1 Active Members</td>
<td>Check active members have fulfilled obligations</td>
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<tr>
<td>1.2 Archive Members</td>
<td>Archive members who have not fulfilled obligations</td>
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<td>1.3 Pending Member Requests</td>
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<td>1.4 Membership Categories</td>
<td>Check members membership categories</td>
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<td>1.5 Process transfers</td>
<td>Process outstanding transfers and then archive</td>
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<td>2 Organisational Management</td>
<td>Add/update equipment held by the club</td>
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<tr>
<td>2.2 Organisational Management</td>
<td>Ensure your organisations details reflect current information and contacts</td>
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<td>2.3 Bank Details</td>
<td>Ensure bank details are up to date</td>
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<tr>
<td>3 Assessments</td>
<td>Process/submit outstanding Assessments</td>
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<tr>
<td>4.1 Patrol Logs</td>
<td>All relevant patrol data has been entered</td>
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</tr>
<tr>
<td>4.2 Incident Report</td>
<td>All Incident Report’s have been entered into the IRD system</td>
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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 clubs obligations remain as Active 2013-2014 registered members.

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 2013/14 with an ‘Active’ Status.

Diagram 1 – example of member with active status and registered for 2013-2014 season
The following report can be run to check that members have fulfilled their patrol obligations at your club:-

- Reports > General Reports > Patrol Reports
- Report Type: Total Member Patrol Hours
- Output Format: CSV
- Style Click: Advanced
- Search Status: Active
- Registered Season: 2013
- Patrol Hours Specifically For Organisation: tick if check hours for your club only
- 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

Generally, people who should be archived include:

- Members that have a different registered season to 2013-2014 but still have an ‘Active’ Status.
- 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.

**Do Not** Archive all your members, Active included, at the end of the season.

Members can be archived using ‘Bulk Processing’ under the ‘Members’ tab. Select ‘Archive Members’ from the Process Type Field.

1.3 Pending Member Requests

All members who join, renew or update their details via Lifesaving Online still need their request accepted by the club before any updates are shown in SurfGuard. These requests are sent as a ‘Pending Member Request’ and will appear in SurfGuard on both the home page and also under the ‘Members’ tab > ‘Pending Member Requests’. All outstanding Pending Member Requests should be accepted or rejected by the end of your season.

*Note:* Anyone can use Lifesaving Online and even if your club or organisation does not use electronic membership renewals, there may still be some pending member requests sitting on the system that require your attention.

For more information on Lifesaving Online and Pending Member Requests, please refer to the ‘SLSA Lifesaving Online for Club Members - User Guide 1.2’ which can be found on the Members Portal under Library > Administration IT > SLSA > Guides

1.4 Membership Categories

Check your membership lists to ensure that your members are in the correct category. Eg:

- Probationary members who have completed their award should be moved into the appropriate membership category (Active 15-18; Active 18+).
- Junior Activity Members who have completed their SRC should be moved to ‘Cadet’.

1.5 Transfers

Ensure all transfers have been processed and there are no outstanding transfer requests. Contact your branch/state or the losing/winning club if transfers still require attention. Transfers can be accessed via the ‘Transfers’ tab > ‘Transfers’.

**Organisational Management**

The following functions can be accessed via the ‘Organisational Management’ tab.

2.1 Gear and Equipment

Ensure all Gear and Equipment has been entered correctly in SurfGuard taking into account 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 Surfguard Organisational Details are accurate and up to date.

Details such as Display name, Contact Details, ABN, logos and other club information now 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.

2.3 Bank Account Details

Ensure your club’s Bank Account Details are up to date and correct. If your club uses the Payment Gateway it is also necessary to notify the IT Helpdesk (ithelp@slsa.asn.au) of any changes to your bank account details to ensure funds paid online go to your correct account.

Assessments

3.1 Assessment Request Lists

Check your “Assessment Request List” to ensure there are no outstanding assessments waiting for processing. Contact your Branch or State centre for any assessment processing problems.

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 into the Incident Reporting Database (IRD) or updated if already added 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.

End of Season Reporting (Top Patrol Members, Seasonal Awards, etc)

Surfguard provides summaries useful for end of season reporting and season awards. Click the Summary tab and use the Drop down menu to select the type of Display you require. Some of the Display options are listed below:-

<table>
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<tr>
<th>DISPLAY</th>
<th>DESCRIPTION</th>
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<tr>
<td>Awards – Originating FROM Your Club</td>
<td>Tick “Breakdown by Month” to show Awards for each month of the season.</td>
</tr>
<tr>
<td>Patrol Hours – Organisations</td>
<td>Tick “Breakdown by Month” to show the total monthly Patrol Hours provided by your club</td>
</tr>
<tr>
<td>Patrol Hours – Top Members</td>
<td>Top 10 Male and Female members based on service hours</td>
</tr>
<tr>
<td>Membership Categories</td>
<td>Statistics for Total Members, M/F, Categories, Retention Rates, etc.</td>
</tr>
<tr>
<td>Patrol Stats</td>
<td>Generates a Report that can be broken down as Patrol Stats or Unpatrolled Stats. Report details the number of rescues by time and type of rescue (e.g. no gear, tube, board...), total attendance at sign on, mid-patrol, and sign off, number and type of First Aid incidents reported, and the number of Preventative actions</td>
</tr>
</tbody>
</table>

Pre-Season IT Activities

<table>
<thead>
<tr>
<th>PRE-SEASON CHECK-LIST</th>
<th>ACTIVITY DESCRIPTION</th>
<th>TASK COMPLETE</th>
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<td>6.1</td>
<td>Changes to Mandatory Fields in Surfguard</td>
<td>Need to collect additional information from members</td>
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<td>6.2</td>
<td>Renewing Memberships</td>
<td>Methods to send out Membership Renewal</td>
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<td>Electronic Fee Payments</td>
<td>Signing up for the Payment Gateway</td>
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<td>6.4</td>
<td>Updating Payment Gateway</td>
<td>Update Price List</td>
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<td>6.5</td>
<td>Clothing Sizes</td>
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</table>
6.1 Changes to Mandatory Membership Fields in Surfguard
Some previously optional member detail fields will become mandatory as of 1st July 2014 due to legislative requirements as a result of being an RTO. You should start collecting this information now:-

- Title eg Mr, Miss, Master
- Address (Home & Postal) – If the Postal address is the same as the Postal you can tick the box “Same as home address” otherwise you can manually enter the Postal Address

6.2 Renewing Memberships
Prior to Club AGM’s most clubs distribute instructions to existing members on the upcoming season membership renewal process. Below we have outlined 3 methods of delivery to members of the SLSA Membership Form.

Method 1 - Online Registration of Membership
Members can renew/join via www.lifesavingonline.com.au. Lifesaving Online is an online portal where members can update and renew memberships. They can also pay their clubs membership fees; donations; etc. (refer to 5.2 “Electronic Fee Payment” for more information). Members can also view their patrol rosters/hours; awards; personal information; etc. When sending out your renewal notifications ensure you inform members of the process they need to follow to renew online.

Method 2 - Printing/Mailing Members a Prefilled SLSA Membership Form (F76).

- Go to the ‘Reports’ tab > Select ‘General Reports’ > ‘Member Reports’.
- Report Type = ‘Membership Renewal Form’.
- Output Format = PDF
- Renewal Season = 2014/2015
- Registered Season = 2013
- Display Report

Important Note: If printing forms for all your members, it is highly recommended to break the output up into a number of smaller groups, as this report can be large and you may experience time-out issues. To do this simply narrow your selection by members with the last names starting from ‘a’ to ‘c’, then another output of members from ‘d’ to ‘f’, etc.

Printing Mailing labels:

- Go to ‘Reports’ > ‘General Reports’ > ‘Member Reports’.
- Report Type = ‘Mailing Labels – Members’
- Output Format = Avery (J8160/L7160)
- Registered Season = 2013

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

Method 3 - Emailing Members a prefilled Membership Form from Surfguard.

The first step is to amend the ‘Cover Letter’ Template to ensure it has all the information your members need to renew their membership eg. preferred renewal method; club contact details; club fees, etc. Go to Maintenance > Templates > Edit Membership Renewal Form. Amend and save this template. Then:

- Go to ‘Reports’ > ‘General Reports’ > ‘Member Reports’.
- Click on ‘Advanced Search’
- Report Type = ‘Membership Renewal Form’
- Output Format = PDF
- Renewal Season = 2014/2015
- Status = ‘Active’
- Registered Season = 2013
- Tick the ‘Email to Members’ box
- Tick the ‘Declaration’ box
- 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.

If required, the blank SLSA Membership Form can be found on the Members Portal (search “F076” or “Membership Form”)

6.3 Electronic Fee Payments
The Payment Gateway is integrated with Lifesaving Online, enabling members to easily pay membership fees and other payments online.

If your club has not yet signed up for the Payment Gateway please contact the SLSA Helpdesk for further information or complete the SLSA Form 75 – Payment Gateway Bank Details Information & Form 79 – Payment Gateway Direct Debit Request, which are available from the Members Portal (search “F079” or “Direct Debit Request”).

6.4 Updating Payment Gateway Price Lists
Clubs using the Payment Gateway are reminded to update their Price Lists to reflect any changes. The SLSA Payment Gateway User Guide and Example Price Lists can be found on the Members Portal (click Library, Administration, IT, SLSA, Guides and look for the “Payment Gateway for Administrators – Guide v1.0”)

6.5 Clothing Sizes
It is important to have correct clothing sizes for each member in Surfguard to ensure accurate ordering can be done. SLSA uses this data to order Patrol Uniforms. This data can also be used by clubs to order the correct numbers of each size when ordering apparel, team uniforms, vests etc.

Please ask members to supply this information by updating their ‘Personal Details” at www.lifesavingonline.com.au or on their SLSA Membership Form