



SLSA Family Groups – Existing Member’s User Guide v2

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Terminology

Lifesaving Online (LSO) – Lifesaving Online is accessed via the Members Portal and enables members to; update or renew their membership, transfer to another organisation, view their Membership History, view and print a transcript of their Awards, check their patrol roster and all hours patrolled, request a substitution for a patrol, access online courses via eLearning and create a Family group.

Members Portal – all current members of the organisation can create a Members Portal account. LSO is accessed via the Members Portal.

Surfguard – SLSA's National Membership database. Only approved club officers/administrators have access to Surfguard. Certain data in Surfguard can be viewed by members in LSO.

Overview

Family Groups are a mechanism to “Group” members who are in one club, to allow for bulk management of data. Any person who wants to be part of a family group **MUST** be in Surfguard.

Family Group Creation allows for the following tasks to be performed in Lifesaving Online (LSO) in the Members Portal:

1. Apply to create a family group consisting of members in a club
2. Display Groups you might be a member of in each club
3. Promote a family group member to primary member to manage the group
4. Renew the membership all members of the group
5. Edit personal details for an individual in the group or in bulk

NOTE: All activities performed in the Family Group area in LSO are sent to the club as PENDING requests in Surfguard. The group request is not confirmed until it is approved by the club.

Other information

- A Family Group is simply an artificial grouping of people in one club for the purposes of data management where it is assumed the primary member(s) in control of the group have some sort of legal standing to manage the Family Group.
- Family Groups consist of Primary member(s) who can manage the group and standard members who can be managed in the group.
- A Family Group can only exist where there is at least one Primary and one Standard member.
- A Primary member must be over 18 years old.
- Family Groups can only be created by members 18 years and over
- Notifications will be sent when a person is demoted or removed from a group.
- Clubs must approve all requests initiated from the Family Groups area.
- Club Officers can manage the groups and perform all other family group functions from within Surfguard.
- You can be a member of more than one family group in one club and/or a member of a family group in more than one club.
- Any disputes or issues around the creation, data management or dissolution of a group should be raised with your Club in the first instance.
- All users of the Member portal automatically agree to abide by all SLSA and State / Branch and Club Terms of Use, Privacy and other Policies, Regulations and guidelines.
- The use of family groups / Lifesaving Online / Member Portal are not compulsory.

Getting Started

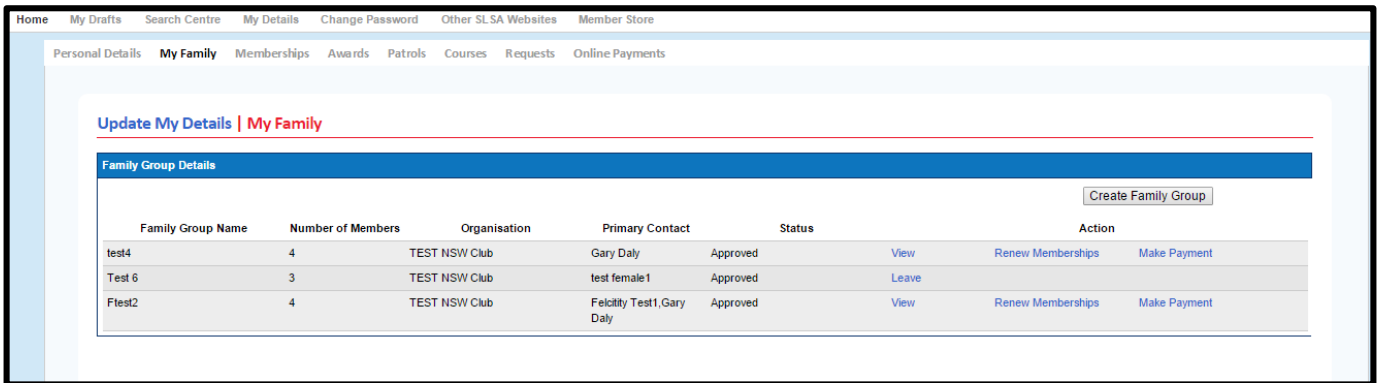
To use Family Group member functions in LSO via the Members Portal:

6. All family group members need to be in Surfguard and members of the same club as the Primary member
7. Only the **Primary** member(s) of the Family Group needs to have a Members Portal Account – to create an account go to portal.sls.com.au
8. Once the group is created and submitted, *the Primary Member can then submit Membership Renewal and make payments for the members of the group.* They will not be able to Edit or Update the family group until it has been approved by the club.

Existing Members – How to Create a Family Group

Members can create a family Group by logging in to their Members Portal account and going to Lifesaving Online > My Family

1. Click Create Family Group



2. The “Create a Family Group” screen will display

Complete all compulsory fields including the Family Group Name, Organisation and the Names of each member you want to add to the family group.

NOTE 1: If you are the person creating the family group you are automatically made a member of the family group. You do not add your details as below.

NOTE 2: You need to match **exactly** the details of your family members. If the members details have been entered correctly they will appear in the Available Members list on the left-hand side.

Family Group Details

Family Group Name: * Cocks Family
Organisation: * Clovelly

Select Members in Family Group

First Name: * Patrick
Last Name: * Cocks
Date of Birth: * 12/08/1

Note: for Privacy reasons, you will need to match exactly each person searched to be able to add them to your Family group. If you are having difficulty finding your members of family, contact your club who can assist.

Available Members: Patrick Cocks
Selected Members:

Problem – The Members Name is Not Appearing in the Available Members List

There are a few reasons why the member will not appear:

1. You need to match exactly the details of your family members . As stated on the screen *“for Privacy reasons, you will need to match exactly each person searched to be able to add them to your Family group. If you are having difficulty finding your family members, contact your club who can assist.”* The First Name, Last Name & DOB are checked against the data stored in Surfguard. The most common problem is caused by incorrect First Name e.g. Patrick in the database and you type Paddy
2. The member has been “Archived” in Surfguard. Any member with an “Archived” status will not display.
3. The family member isn’t an approved member of the club - there is no membership file in Surfguard. They will need to join via sls.com.au/join, once approved by the club, they can then be added to the family group.

3. Move the member from the Available Members across to the Selected Members on the right-hand side. *Repeat this process for each member you want to add to the group. Once you have added all the members scroll down and click the SUBMIT button at the bottom.*

NOTE: Move all members you wish to have in the family group across to selected members prior to submitting the family group to the club for approval. Once you have found a family member and moved them across from available to selected members, be aware you can go back up and type over previous family member to find additional family members. **DO NOT** submit family group until all members are sitting in the selected members box.

4. Once submitted successfully the following will display.

Success

The Family Group creation request has been successfully submitted for approval.

5. **NOTE: THE FAMILY GROUP STILL NEEDS TO BE APPROVED BY THE CLUB.**

Until the Family Group is approved the following applies:-

- a. The primary member will only be able to **RENEW MEMBERSHIP and MAKE PAYMENT** for members currently in the family group
 - b. Refresh your page once submitted to the club for approval and the primary member can use the ‘My Family’ group to renew and make payments. Submitting the request to the club for approval, doesn’t impact the functionality of the group.
 - c. You will not be able to Add additional family members or Edit the Family group until the club has accepted the Family group request.
7. Once your club has approved your family group, you will receive the following email;

Hi

Your request to create a family group '[family group name]' has been approved by your club – [club name].

Members of the family group will be approved individually and their approval statuses can be seen in the Member Portal under Personal Details -> My Family

If you have any questions, please contact the Club directly. Please do not reply to this email.

Regards,
Test NSW Club
0292158001
ithelp@slsa.asn.au
www.sls.com.au

Managing your Family Group as a Primary Member

Once the Family Group has been approved the Primary member(s) can then manage the Family Group

Login to the Members Portal > Lifesaving Online > My Family and click **“View”**

Family Group Details							Create Family Group	
Family Group Name	Number of Members	Organisation	Primary Contact	Status	Action			
test4	4	TEST NSW Club	Gary Daly,Rebecca Cocks	Approved	View	Renew Memberships	Make Payment	
Cocks Family	3	Clovelly SLSC	Rebecca Cocks	Approved	View	Renew Memberships	Make Payment	

A listing of all members of the Family Group will display. From this screen the Primary member(s) will be able to:-

- Add a New Member and/or New Primary Contact
- Dissolve the Family Group
- Promote a Standard member to a Primary member (only Members over 18 can be a Primary Member)
- Remove Members
- Edit Members

Family Group Details							
Cocks Family - Member Listing							
No of Members: 3						Add New Member	
Group Status: Approved						Add New Primary Contact	
Organisation: Clovelly SLSC						Dissolve Family Group	
Member ID	Member Name	Membership Status	Season	Membership Category	Primary?	Status	Action
4564123	Damien Cocks	Active	2014	Active (18yrs and over)	No	Approved	Remove Promote as Primary Contact Edit
4235719	Patrick Cocks	Active	2014	Active (15-18 yrs)	No	Approved	Edit
4625252	Rebecca Cocks	Active	2014	Active (18yrs and over)	Yes	Approved	

How to Promote or Add a New Primary Contact to a Family Group

At any time one primary person in a group can add or promote another standard member of their group to be a Primary Contact

Family Group Details

Cocks Family - Member Listing

No of Members: 3
Group Status: Approved
Organisation: Clovelly SLSC

The process to add is the same as adding a member. The search criteria also checks the member is:-
1. 18 years and older
2. Has an email address in the member profile

Buttons: Add New Member, Add New Primary Contact, Dissolve Family Group

Member ID	Member Name	Membership Status	Season	Membership Category	Primary?	Status	Action
4564123	Damien Cocks	Active	2014	Active (18yrs and over)	No	Approved	Remove Promote as Primary Contact Edit
4235719	Patrick Cocks	Active	2014	Active (15-18 yrs)	No	Approved	Edit
4625252	Rebecca Cocks	Active	2014	Active (18yrs and over)	Yes	Approved	

Click here to promote existing member

How to Demote Yourself as a Primary Member of the Group

At any time a primary member can demote themselves back to a standard member of the group. They cannot demote other Primary members. Other members can demote themselves or you can contact your club to perform this function. A notification will be sent once approved.

Family Group Details

Cocks Family - Member Listing

No of Members: 3
Group Status: Approved
Organisation: Clovelly SLSC

Buttons: Add New Member, Add New Primary Contact, Demote as Primary Contact, Dissolve Family Group

Click here to demote yourself as a Primary Contact

Standard Member Functions in Family Groups

A standard member of a family group can login to their Members Portal account > Lifesaving Online > My Family - view and do the following:-

- Create a Family Group – follow procedure previously listed.
- Leave a Family Group – needs to be approved by a club.

Family Group Details

Buttons: Create Family Group

Family Group Name	Number of Members	Organisation	Primary Contact	Status	Action
Cocks Family	3	Clovelly SLSC	Rebecca Cocks, Damien Cocks	Approved	Leave

Managing Family Data

How Do I Renew My Family Group Membership

To renew all or some of your family members;

Go to Lifesaving Online > My Family and select the **Renew Memberships**

Family Group Details						
Family Group Name	Number of Members	Organisation	Primary Contact	Status	Action	
test4	4	TEST NSW Club	Gary Daly, Rebecca Cocks	Approved	View	Renew Memberships Make Payment
Cocks Family	3	Clovelly SLSC	Damien Cocks, Rebecca Cocks	Approved	View	Renew Memberships Make Payment

The screen below will display.

The Primary member will be able to select the members they want to renew. Once members are selected for renewal, tick to accept the SLISA Membership Declaration box and click **Submit**.

NOTE:

- Check box will not appear against members who are already registered for the selected season or they have already applied for the selected registration season.

Family Group Membership Renewal							
Family Group Name: Cocks Family Family Group Organisation: Clovelly SLSC Season: 2015/2016							
Family Group Details							
	Member ID	First Name	Last Name	DOB	Membership Status	Membership Category	Season
<input type="checkbox"/>	3531133	Molly	Cocks		Active	Active (18yrs and over)	2014
<input type="checkbox"/>	4235719	Patrick	Cocks		Active	Active (15-18 yrs)	2014
<input type="checkbox"/>	4625252	Rebecca	Cocks		Active	Active (18yrs and over)	2014
<input type="checkbox"/>	4564123	Damien	Cocks		Active	Active (18yrs and over)	2014

Once submitted you will be given the option to **Pay Online**

Success

Membership renewal for Cocks Family group request has been successfully raised for [Click here is you wish to pay online](#). This link will take you to a payment website operated by a third party on behalf of SLISA. To view your pending requests [click here](#)

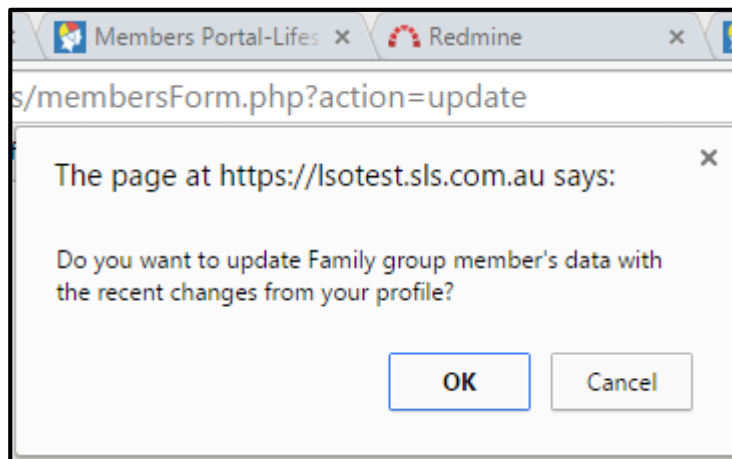
NOTE: you can pay for the whole family in one payment. The payment will be recorded against the primary member who was logged in, in the Members portal. The club will then accept the membership renewal requests upon payment to update each member file ensuring they registered and financial for the current season.

How Do I Edit/Update Details for all Members of the Family Group at Once?

The Primary member needs to login to the Members Portal > LSO > Personal Details and edit their details. E.g. Change of address and new home phone number. Scroll down to the bottom of the screen and tick the authorisation box, then **Submit**.

A pop-up will display on the screen

Update All Family Group Members
Action: Click OK



You will be asked what data to share / copy with your family members (see picture below).

Tick the boxes for the data you want to have updated in other members profiles and click save. A request to Update Personal Details will be sent to the club as a Pending Request for approval.

Share data with Family Groups

Family Group Name: Cocks Family

Family Group Organisation: Clovelly SLSC

First Name	Last Name	DOB	Membership Status	Membership Category	Season	Update Address Fields?	Update Phone?	Update Email?	Update Emergency Details with your profile values?
Patrick	Cocks	12/08/1999	Active	Active (15-18 yrs)	2015	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Damien	Cocks	18/02/1961	Active	Active (18yrs and over)	2015	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save Cancel

How Do I Request a Transfer of my family to another Club?

This function is currently unavailable in Lifesaving Online. Each member (person) will need to be individually transferred using their OWN members portal account within Lifesaving Online, or arranged to be manually entered into our database by the Winning or the Losing Club.

What if I want to join up a NEW member of my family to this club?

You will need to go to sls.com.au/join to submit an application. You can add that person to your family group once their membership is accepted by the club.