Member Portal
User Guide

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Contents

Document control

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Version	Date	Status	Comments
0.1	April 2023	DRAFT	First draft
1.0	August 2023	FINAL	First release.

Glossary

| Term	Definition
Associate Membership	Involvement in the club but is not necessarily a competing or lifeguarding (active) member
Member	The natural person who has the membership
Membership	The association the person (member) has with the club. The membership shows subscription information.
Primary Membership	Someone who competes and lifeguards at the club
Secondary Membership	An association with two clubs. They hold a primary membership elsewhere but may patrol at your club.

Business Units and Security Roles

Business Units

The hierarchy of business units is as follows.
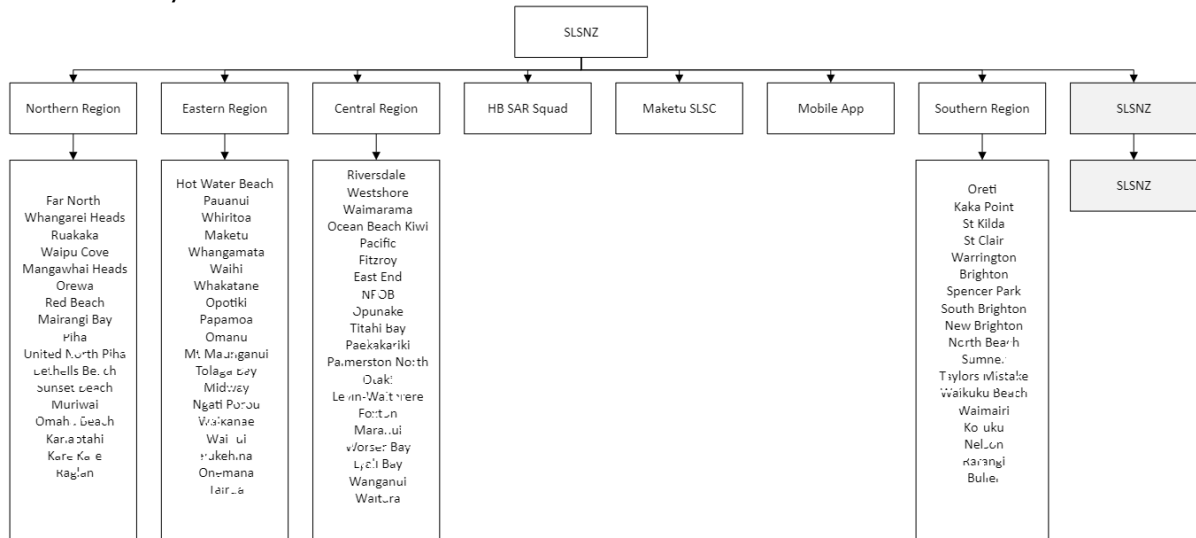
Anyone assigned a single club can see the details and members belonging to that club.
Anyone assigned to a Region can see the details and members of all clubs within that region.
Anyone assigned to SLSNZ can see all regions and clubs.

User roles in the Portal

Four user roles have been set up in the Portal:
- Member
- Patrol Captain
- Club Administrator
- Administrator

Additional access will need to be built and tested.

MEMBER

The Member role only gives the user access to their information.

<u>Web roles</u>

Web role	Top Level Menu	Secondary heading	Access level
Member	Home page		View
	Clubs		View and Search
	Member Lounge	My Profile	Edit and view
		My Patrols	View
		My Patrol Hours	View
		My Awards	View
		My Courses	View
		Membership desk (Request secondary membership / Request transfer)	Create
	Waves		Login screen
	Online Learning	EtrainU	Login screen

PATROL CAPTAIN

When this role was created, the patrol captains would capture a lot of information on paper and the club admins would enter it into the portal. In the 2022/2023 season, the Patrol App was released, which allowed the captains to enter their data in on their mobile phones. The majority of captains enter their data via the patrol app, however, there are a few that fill out paper-based forms and the data needs to be added into the Portal / CRM after the fact. To enter the data, they need the **Patrol Edit** role.

Web roles

The following roles are very similar. The **Patrol Edit** role allows you the same access as the **Patrol View**, but allows you to Create and Edit, rather than just View data.

Web role	Top Level Menu	Secondary heading	Access level
Patrol Edit	Home page		View
	Clubs		View and Search
	Club Patrols	Patrols	Create and View
		Patrol Teams	Create and View
		Incidents	Create and View
	Waves		Login screen
	Online Learning	EtrainU	Login screen

For anyone wanting access to view Patrol data but not edit, the **Patrol View** role can be used.

Web role	Top Level Menu	Secondary heading	Access level
Patrol View	Home page		View
	Clubs		View and Search
	Club Patrols	Patrols	View
		Patrol Teams	View
		Incidents	View
	Waves		Login screen
	Online Learning	EtrainU	Login screen

CLUB ADMINISTRATOR

A user can only be a Club Administrator for their *primary* club.

The **Member** role can be added to a Club Administrator so that they can view their personal information.

A Club Administrator can perform the role of Patrol Captain and have the **Patrol Captain** role assigned in addition to the below.

Web Roles

Web role	Top Level Menu	Secondary heading	Access level
Club admin base role	Home page		View
	Clubs		View and Search
	My Club	Club	View and Edit
		Contacts	View and Edit
		Memberships	Create, View, and Edit
		Membership History	View and Search
		Club Roles	Create, View, and Edit
		Applications	View and Edit
		Transfers	View and Edit
		Awards	Create, View, and Edit
		Course Bookings	DEFECT RAISED
	Reporting	Season Member Stats	View
		Member Patrol Stats	View
		Season Patrol Stats	View
		Monthly Patrol Stats	View
	Waves		Login screen
	Online Learning	EtrainU	Login screen

ADMINISTRATORS

The *Administration* role provides full access to the Portal for your primary club. Recommendation: This should be treated as a System Admin account and should be used by SLSNZ Database Administrator.

Web roles

Web role	Top Level Menu	Secondary heading	Access level
Member	Home page		View
	Clubs		View and Search
	Member Lounge	My Profile	Edit and view
		My Patrols	View
		My Patrol Hours	View
		My Awards	View
		My Courses	View
		Membership desk (Request secondary membership / Request transfer)	Create
	Waves		Login screen
	Online Learning	EtrainU	Login screen
Patrol Edit	Club Patrols	Patrols	Create and View
		Patrol Teams	Create and View
		Incidents	Create and View
Club admin base role	My Club	Club	View and Edit
		Contacts	View and Edit
		Memberships	Create, View, and Edit
		Membership History	View and Search
		Club Roles	Create, View, and Edit
		Applications	View and Edit
		Transfers	View and Edit
		Awards	Create, View, and Edit
		Course Bookings	DEFECT RAISED
	Reporting	Season Member Stats	View
		Member Patrol Stats	View
		Season Patrol Stats	View
		Monthly Patrol Stats	View

Helpful tips

Logging in

The Portal is in the cloud, which means it is accessible from anywhere you have an internet connection.

Locate the Portal by going to: https://memberportal.surflifesaving.org.nz

When you log in, use SLS_[your membership number] and the password you have been provided.

The view you have will be based on the user role you have been allocated.

RESET YOUR PASSWORD

CRM Security role required:	System Administrator
Prerequisites	Member must exist

The member must apply online, and the System admin will reset the password.

Step	Person	System	Step
1.	Member	Portal	On the Sign In page, click Forgot my password

Step	Person	System	Step
2.	Member	Portal	Enter the email address associated with your account, then click Send

If the member contacts you to say they need their password reset, ask them to complete these steps.

If they say they have done this but haven't received a password, get in touch with database@surflifesaving.co.nz.

My Club

Club

This screen displays a summary of your club, as well as a link to your club's website (if you have one).

Club Administrators can update the Club information by clicking on the pencil icon on the right hand side of the screen. This information is then pushed to the Surf Lifesaving NZ website.

Information able to be edited in the Portal

Information as it appears on the Surf Lifesaving NZ website

Club Details

Email	titahibayslsc@gmail.com
Website	http://www.titahibayslsc.org.nz/
Phone	04 236 8244
Contact	Deborah Donkin

Addresses

Physical

Cnr Beach Road & Toms Road
Titahi Bay
Porirua

Postal

PO Box 52010
Titahi Bay
Porirua 5242

Club Overview

2011 Wellington Club of the Year
2014 & 2015 Capital Coast Awards of Excellence - Whitehorse Trophy
2015 Central Regionals - winners - CR tray
2016 Capital Coast Awards of Excellence - Sports Team of the Year - U23 Women's Boat Crew
2016 Capital Coast Awards of Excellence - Sportsman of the Year - Marty McDowell
2017 Capital Coast Awards of Excellence - Sports Team of the Year (Open Mens Boat Crew)
2017 Capital Coast Awards of Excellence - Innovation of the Year (Coastal Research Project)
2019 Capital Coast Awards of Excellence - Sports Team of the Year (Open Male Surf Boat Crew)
2021 Capital Coast Awards of Excellence - Innovation of the Year (Pathways Coordinator)

Contacts

This screen shows you all active contacts that belong to your club. You can view those who are no longer active members by clicking on Active Club Contacts and selecting Inactive Club Contacts.

SEARCH FOR A CONTACT

If you know the person's first name, enter it in this box and the system will bring up all people in your club with the characters you have entered in their first name, surname, or email address.

USING THE WILDCARD

A "Wildcard" is a substitute, a placeholder for information, the one the Portal uses is an asterix *. You use the wildcard when you don't know all the details.

VIEW OR EDIT CONTACT DETAILS

To view someone's contact details, click the "i" icon next to their contact details.

To edit someone's contact details, click the pencil icon.

Memberships

This screen shows you all active members that belong to your club. You can view those who are no longer active members by clicking on Active Memberships and selecting Inactive Memberships.

EDIT A MEMBER'S DETAILS

Step	Person	System	Step
1.	Admin	Portal	Locate your member and click the pencil icon next to their record
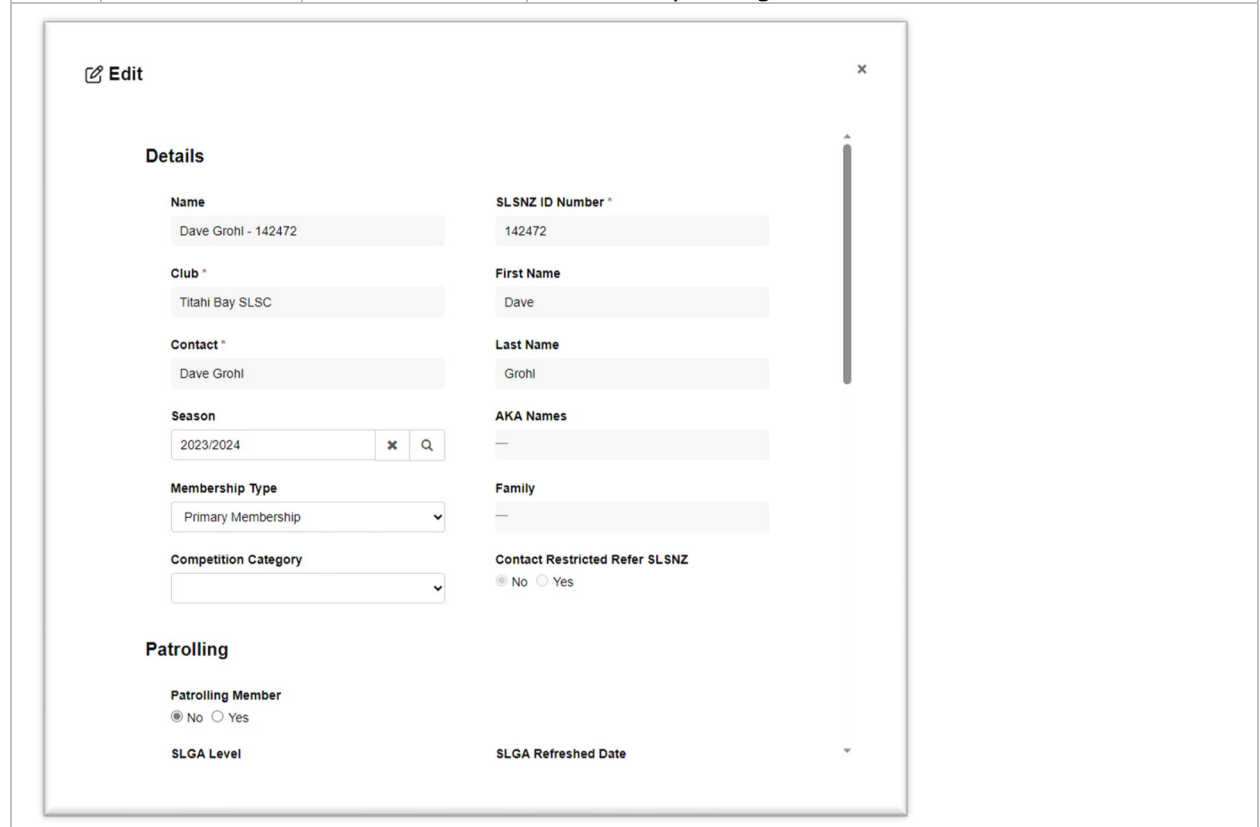
2.	Admin	Portal	Here, you can edit any of their membership details. Scroll to the bottom and click Submit when you are finished updating.

![Surf Life Saving New Zealand logo]

ROLL OVER A MEMBERSHIP

If an existing member wants to return this season and become an active member you need to find their inactive membership record and roll it over into the current season.

Web role required:	Club Administrator

Step	Person	System	Step
1.	Member	N/A	Makes request to renew
2.	Club admin	Portal	In the Portal, go to My Club > Memberships
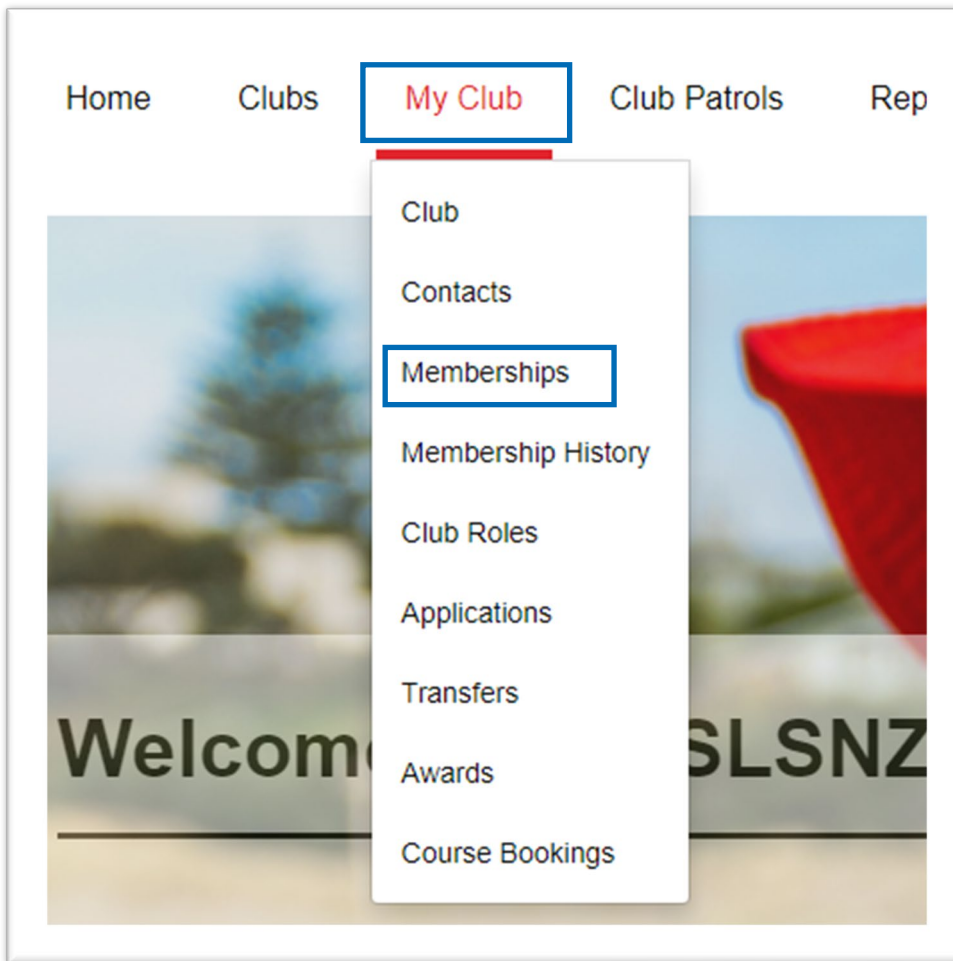
2.	Club admin	Portal	Select Inactive Memberships
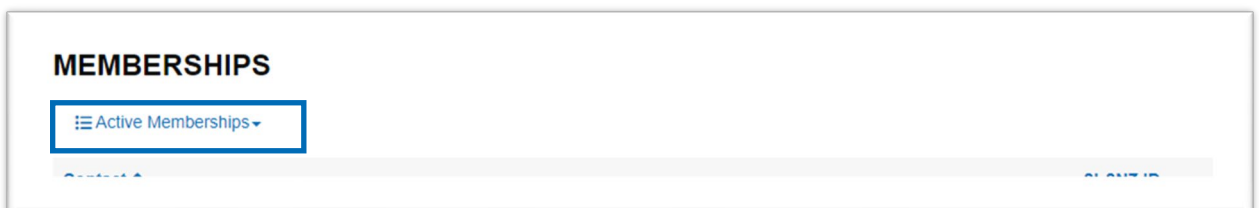
3.	Club admin	Portal	Search for the member's record

4.	Club admin	Portal	Click on the arrows to rollover to current season

5.	Club admin	Portal	Confirm the request

6.	Club admin	Portal	This starts the process to rollover the member. Within a couple of seconds, you should be able to locate them in Active Memberships.

MEMBERSHIP HISTORY

If you want to know how long someone has been a member, you can do this in Membership History.

Web role required:	Club Administrator

Step	Person	System	Step
1.	Club admin	Portal	In the Portal, go to My Club > Membership History. Search for your member. If no records display, your member is new this season. Only previous seasons are displayed.
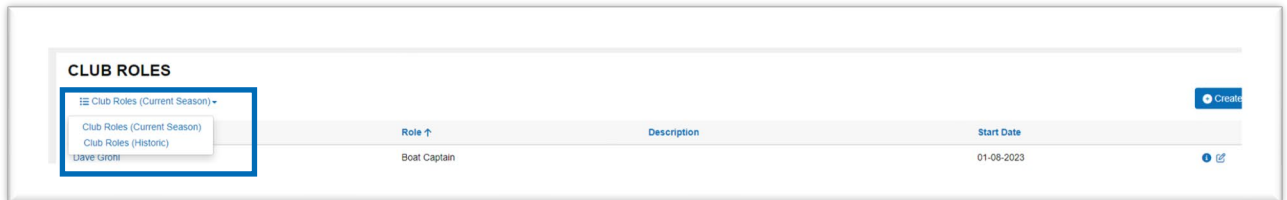
MEMBERSHIP HISTORY

dave

Club	Season ↑	Membership ↑	Membership Type	
Titahi Bay SLSC	2018/2019	Dave	Primary Membership	ⓘ
Titahi Bay SLSC	2012/2013	Dave	Primary Membership	ⓘ
Titahi Bay SLSC	2013/2014	Dave	Primary Membership	ⓘ
Titahi Bay SLSC	2014/2015	Dave	Primary Membership	ⓘ
Titahi Bay SLSC	2014/2015	Dave	Primary Membership	ⓘ
Titahi Bay SLSC	2015/2016	Dave	Associate	ⓘ
Titahi Bay SLSC	2016/2017	Dave	Associate	ⓘ

Club Roles

Web role required:	Club Administrator

Club Roles default to the current season. To view historical seasons, select it from the drop-down menu.
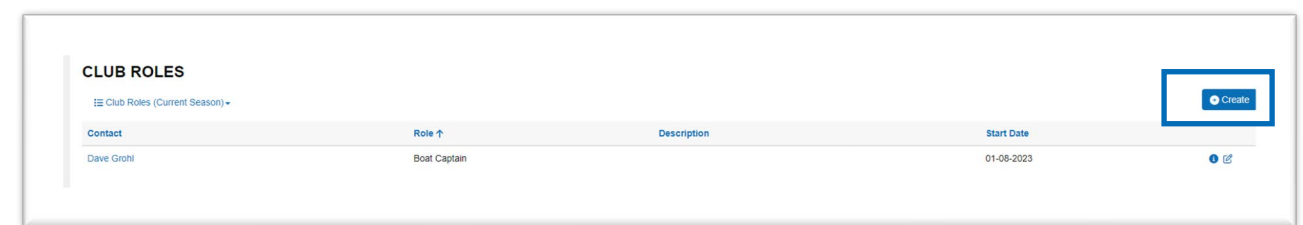
ADD A CLUB ROLE

Web role required:	Club Administrator

Step	Person	System	Step
1.	Club admin	Portal	In the Portal, go to My Club > Club Roles. Click Create.
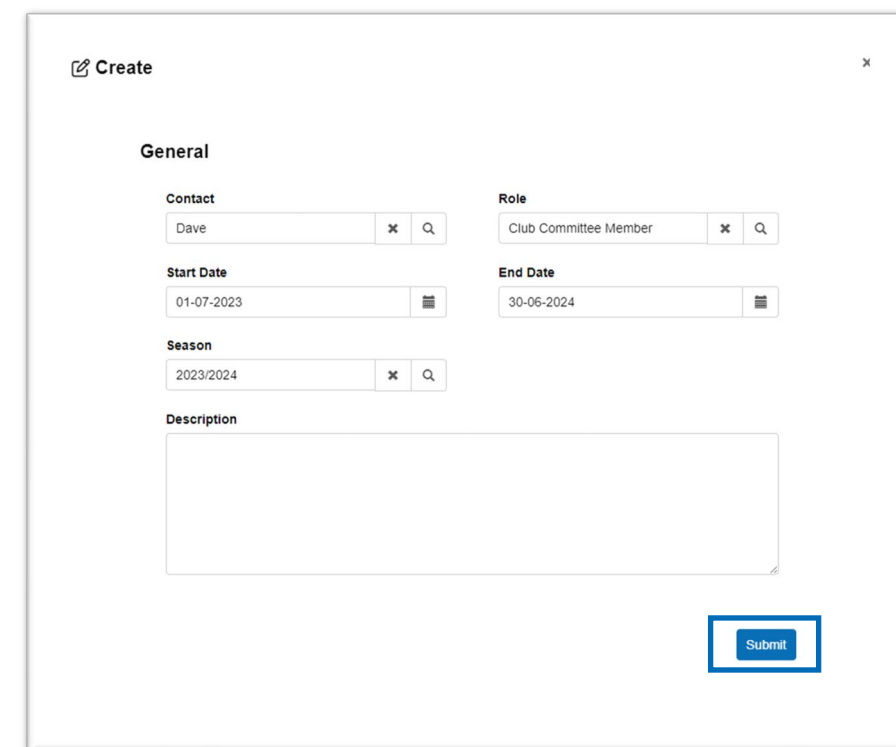
2.	Club admin	Portal	Complete the fields in the pop out box. Click Submit.
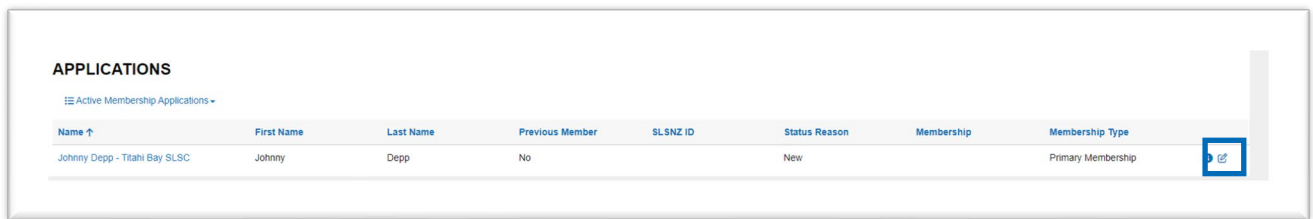
Membership Applications

Web role required:	Club Administrator

PROCESS A NEW MEMBER APPLICATION

Step	Person	System	Step
1.	Club admin	Portal	In the Portal, go to My Club > Applications. This will display all membership applications received by your club that are ready to process. Click on the pencil icon.

2.	Club admin	Portal	Review the application. When you are happy to approve the application, select Yes to Approve for Post Processing. Then scroll to the bottom of the page and click Submit.

The Status Reason will now show as Post-Processed.
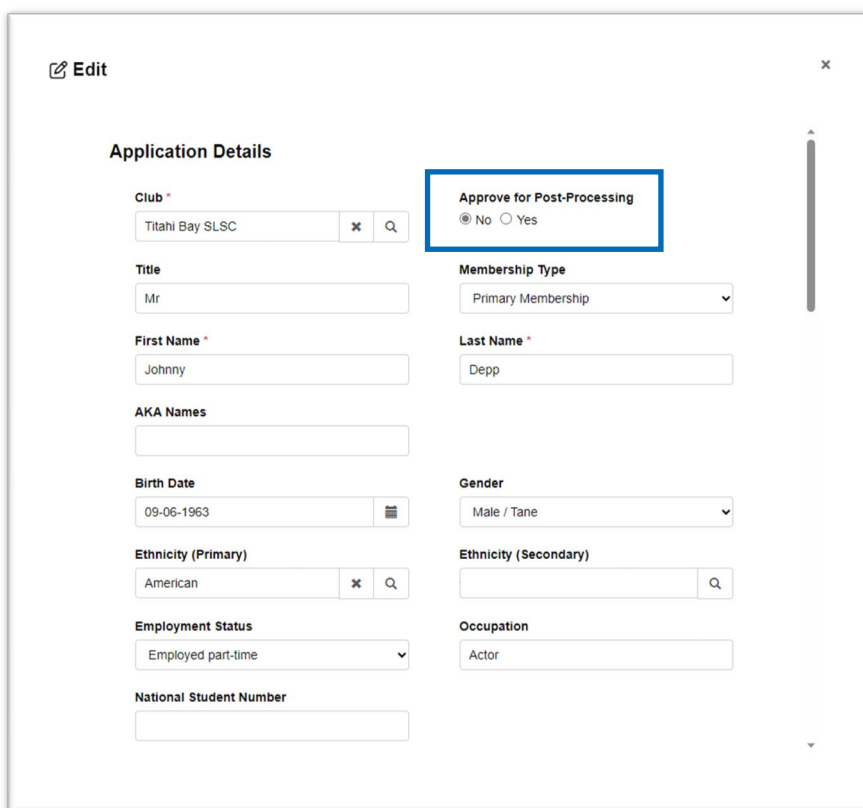
Name ↑	First Name	Last Name	Previous Member	SLSNZ ID	Status Reason	Membership	Membership Type	
Johnny Depp - Titahi Bay SLSC	Johnny	Depp	No		Post-Processed	Johnny Depp - 142484	Primary Membership	ⓘ ✎

The applicant will now display in your list of active members and contacts.

CONTACTS

☰ Active Club Contacts ▾

johnny [🔍] ⊕ Crea

First Name ↑	Last Name ↑	SLSNZ ID	Date of Birth	Mobile Phone	Personal Email	
Johnny	Depp	142484	08-06-1963	021111222	johnny.depp@hotmail.com	ⓘ ✎
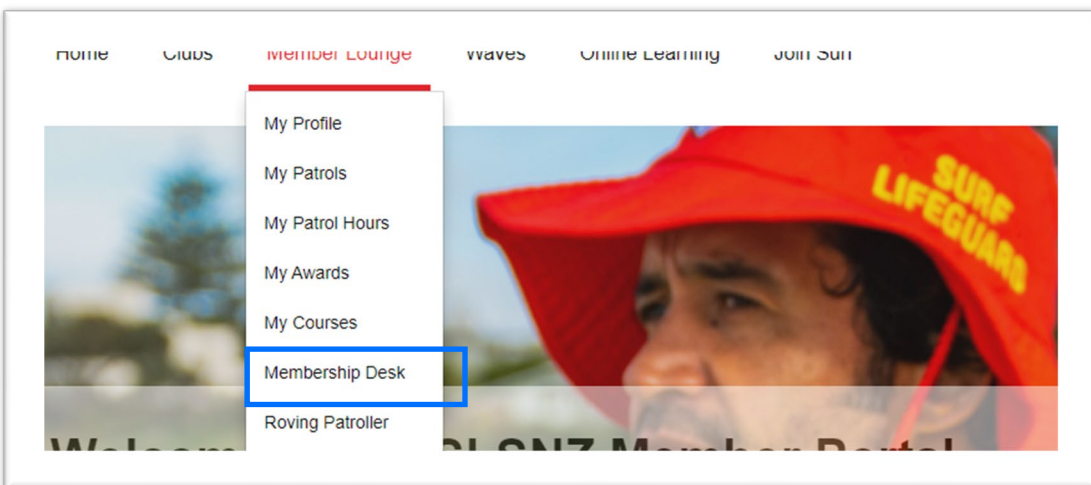
Transfers

Points to note:

1. A Transfer is used when a member wants to change Primary club
2. Only one transfer per competition year is allowed. This is not controlled by the system.
3. Once a transfer has been requested, the request will show initially for the originating club, and once approved it will show for the destination club.
4. Once a member is transferred, they become an active member of the new club, even if they were Inactive prior to the transfer.
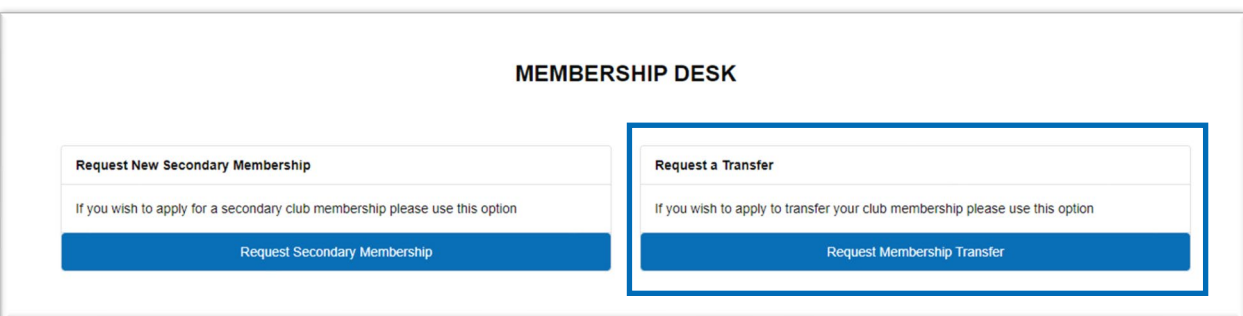
REQUEST A TRANSFER
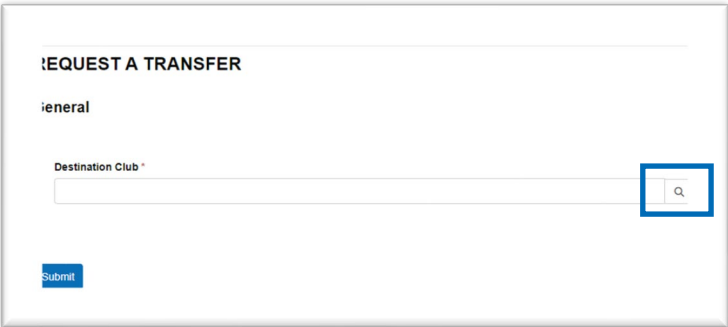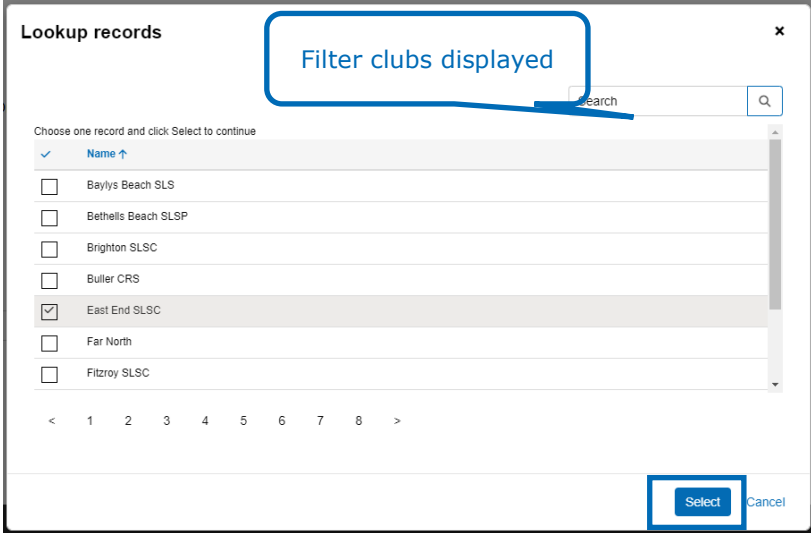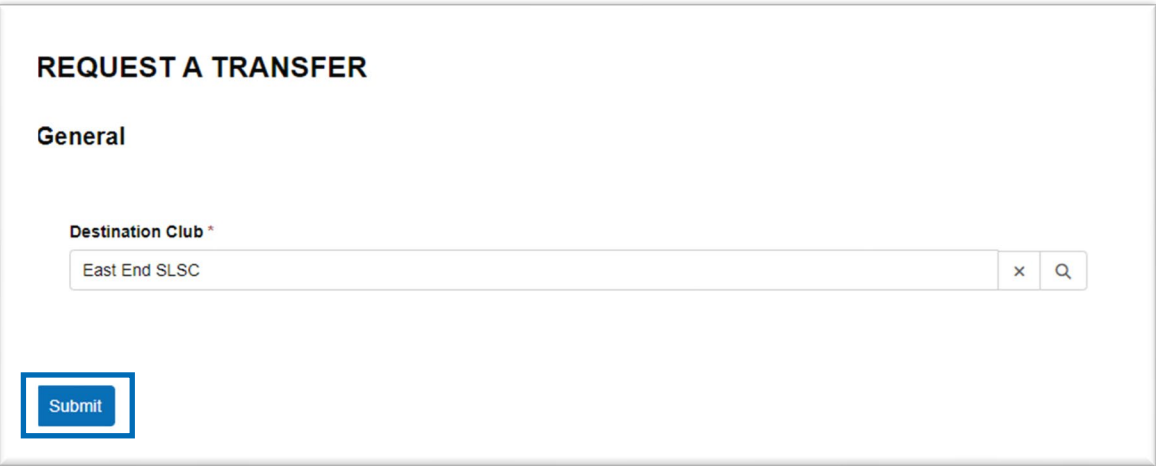
Web role required:	Member

Step	Person	System	Step
1.	Applicant	Member Portal	Go to Member Lounge > Membership Desk

2.	Applicant	Member Portal	Select *Request Membership Transfer*

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NEW ZEALAND

3.	Applicant	Member Portal	Click on the magnifying glass to select the destination club

REQUEST A TRANSFER

General

Destination Club *

Submit

4.	Applicant	Member Portal	Filter the clubs and then tick the one you want to join. Then click Select.

Lookup records

Filter clubs displayed

Search

Choose one record and click Select to continue

✓	Name ↑
☐	Baylys Beach SLS
☐	Bethells Beach SLSP
☐	Brighton SLSC
☐	Buller CRS
☑	East End SLSC
☐	Far North
☐	Fitzroy SLSC

< 1 2 3 4 5 6 7 8 >

Select Cancel

5.	Applicant	Member Portal	Click Submit

REQUEST A TRANSFER

General

Destination Club *

East End SLSC   ✕ 🔍

Submit

6.	*Workflow*	*CRM*	*Send email to:* *Existing club* *Receiving club* *Notifying them of the request to transfer*
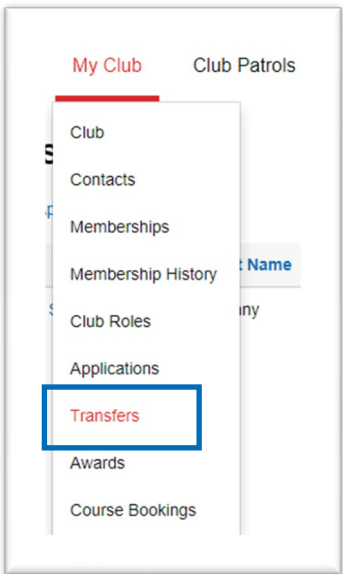
PROCESS A TRANSFER

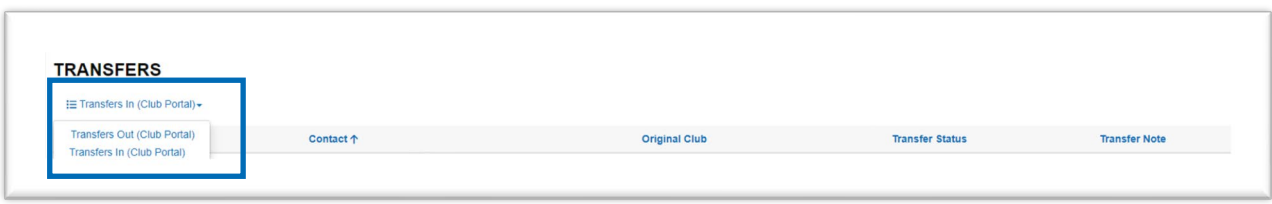| Web role required:	Club Administrator

Points to note:

1. The same process is followed for both originating and receiving clubs.
2. The originating club will receive the request first, and once it is approved the request will be sent to the receiving club.
3. If a member is inactive prior to the transfer, they will remain inactive when they are received by the receiving club.
4. The Transfer history can be found in the CRM. Go to the Contact > Select Transfers (from the drop-down menu next to Related) > then select Inactive Transfers.

Step	Person	System	Step
1.	Club admin	Member Portal	Go to My Club > Transfers.

2.	Club admin	Member Portal	Transfers do not show on one screen, they are split between Transfers In, and Transfers Out. Click on the blue link to display a drop-down menu which allows you to switch between the two.

![SURF LIFE SAVING NEW ZEALAND logo]

3.	Club admin	Member Portal	In this example, Dave Grohl wants to leave his current club and transfer to East End. You have three options: Decline Approve Edit.

TRANSFERS

Transfers Out (Club Portal)▾

SLSNZ ID	Contact ↑	Destination Club	Transfer Status	Transfer Note	
142472	Dave Grohl	East End SLSC	New Transfer		⊘ ✓ ☑

4.	Club admin	Member Portal	Click the pencil to edit. This will allow you to view more details about the request. If you want, you can add a Transfer Note, but this is not compulsory. If you are the originating club, this note will also appear for the receiving club. If you add a note, scroll to the bottom of the screen, and click Submit. If you do not add a note, click the cross in the right-hand corner to close the screen.

☑ **Edit**   ✕

General

Name	Transfer Status
Dave Grohl : From Titahi Bay SLSC to East En	New Transfer

Contact *

Dave Grohl

Transfer Note

[highlighted lines]

Personal Email

—

Mobile Phone

Provide a telephone number

SLSNZ ID Number

142472

Contact Restricted Refer SLSNZ
◉ No ○ Yes

Transfer Details

Original Club *	Destination Club *
Titahi Bay SLSC	East End SLSC

Transfer From Approved   Transfer To Approved

5.	Club admin	Member Portal	If you are happy to progress the transfer, click the tick. If you want to decline the transfer, click the circle with the line through it.

TRANSFERS

Transfers Out (Club Portal) ▾

SLSNZ ID	Contact ↑	Destination Club	Transfer Status	Transfer Note	
142472	Dave Grohl	East End SLSC	New Transfer	Dave has moved to New Plymouth and will be competing there.	⊘ ✓

Awards
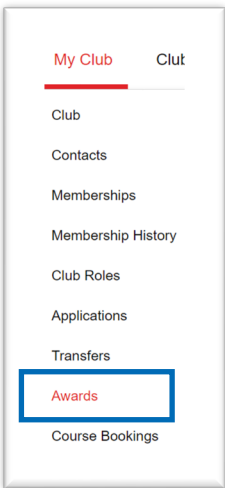
Web role required:	Club Administrator

Points to note:
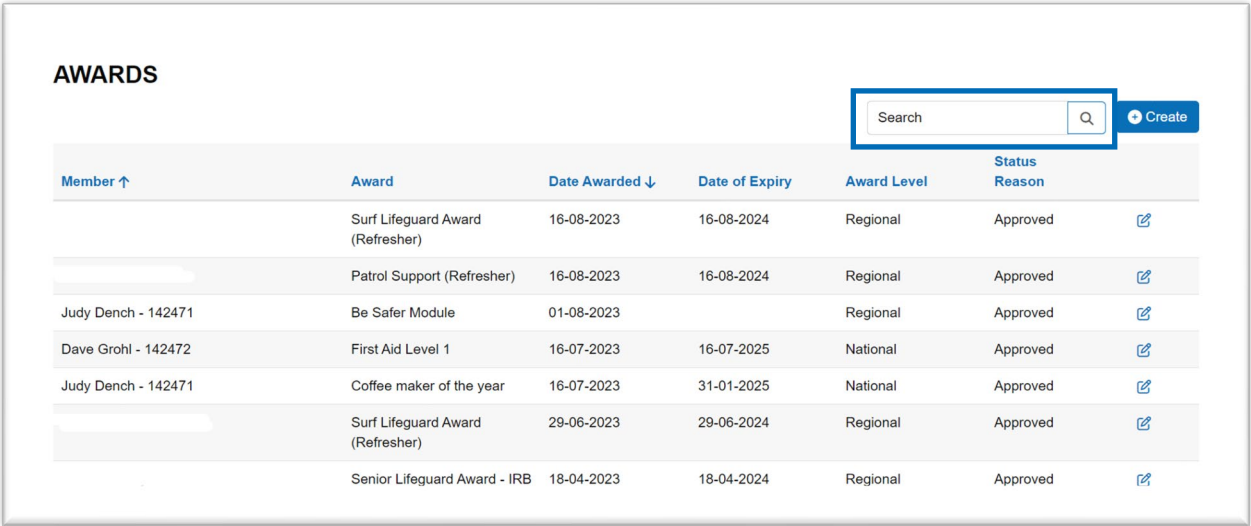
1. This screen shows all the Awards held by members of your club.

VIEW A MEMBER'S AWARDS
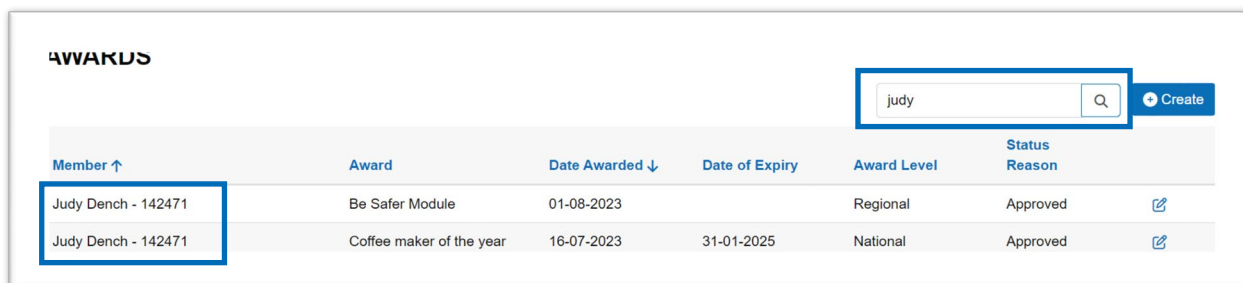
Step	Person	System	Step
1.	Club admin	Portal	Go to My Club > Awards

Step	Person	System	Step
2.	Club admin	Portal	All members will be displayed. Use the search box to find an individual member.

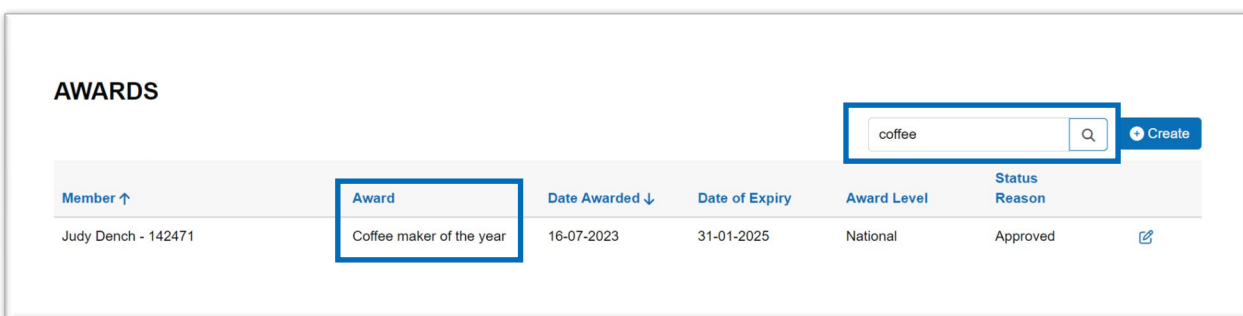| Member ↑	Award	Date Awarded ↓	Date of Expiry	Award Level	Status Reason	
	Surf Lifeguard Award (Refresher)	16-08-2023	16-08-2024	Regional	Approved	
	Patrol Support (Refresher)	16-08-2023	16-08-2024	Regional	Approved	
Judy Dench - 142471	Be Safer Module	01-08-2023		Regional	Approved	
Dave Grohl - 142472	First Aid Level 1	16-07-2023	16-07-2025	National	Approved	
Judy Dench - 142471	Coffee maker of the year	16-07-2023	31-01-2025	National	Approved	
	Surf Lifeguard Award (Refresher)	29-06-2023	29-06-2024	Regional	Approved	
	Senior Lifeguard Award - IRB	18-04-2023	18-04-2024	Regional	Approved	

3.	Club admin	Portal	Once you have entered some characters and clicked the magnifying glass, the system will search for all members who meet the criteria.

4.	Club admin	Portal	You don't have to search by name. If you want to know everyone who has a specific award, you can use the search box to filter those members.

MISSING AWARDS

If you are certain that a member should hold an award and can't find a record of it:

○ Has it been added to the system by either a club, regional or national administrator?

○ If the award has not been added you need to follow up with the administrator who adds the award. Contact your Regional Staff Member who can point you in the right direction

Course Bookings

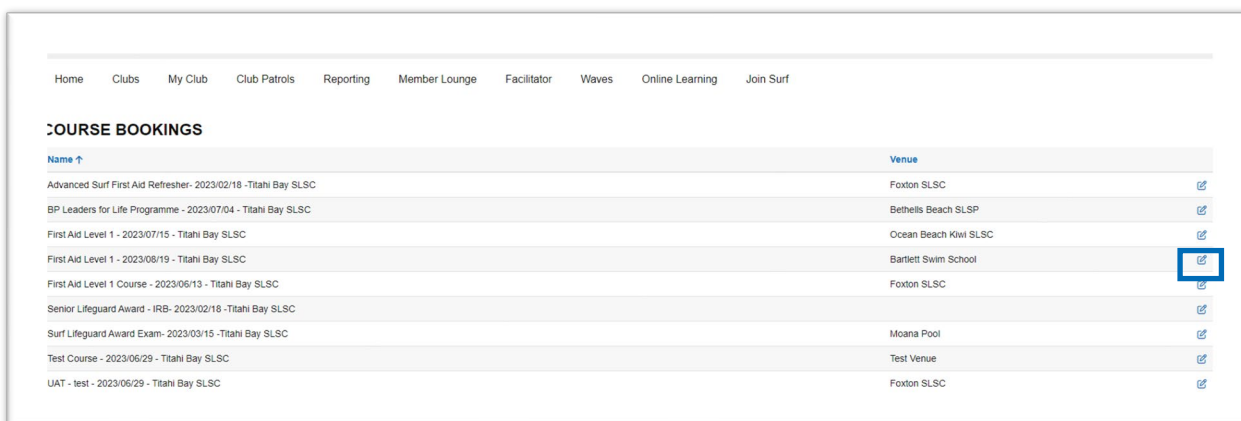| Web role required:	Club Administrator

Step	Person	System	Step
1.	Club admin	Portal	In the Portal, go to My Club > Course Bookings. This is where you will find active open courses in your area.

ADD A MEMBER TO A COURSE

Step	Person	System	Step
2.	Club admin	Portal	Find the correct course and click on the pencil icon on the right-hand side.

3.	Club admin	Portal	Scroll down until you get to the Participants heading. Click the blue Create button.
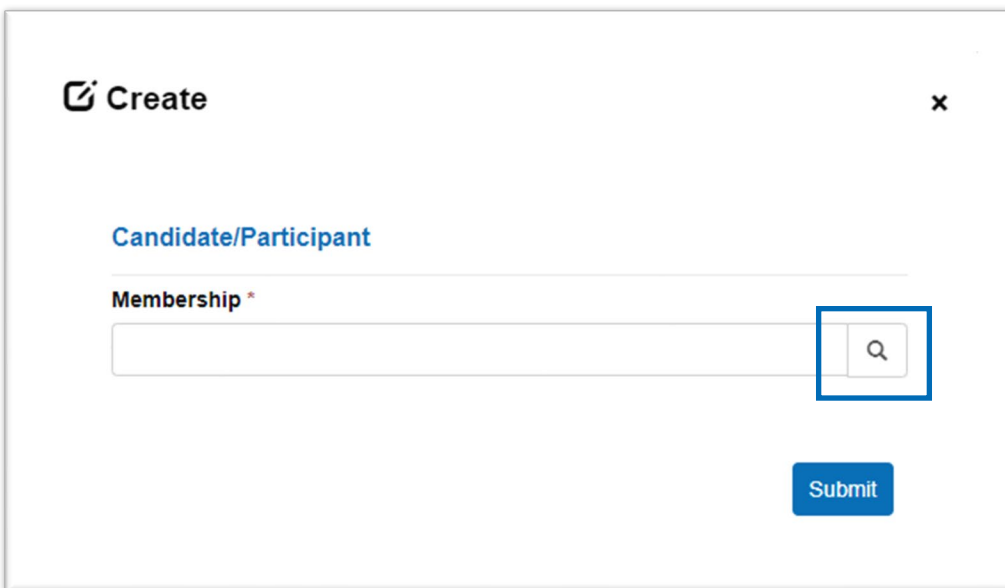
4.	Club admin	Portal	Locate the member using the magnifying glass.

5.	Club admin	Portal	Tick the member and click Select.
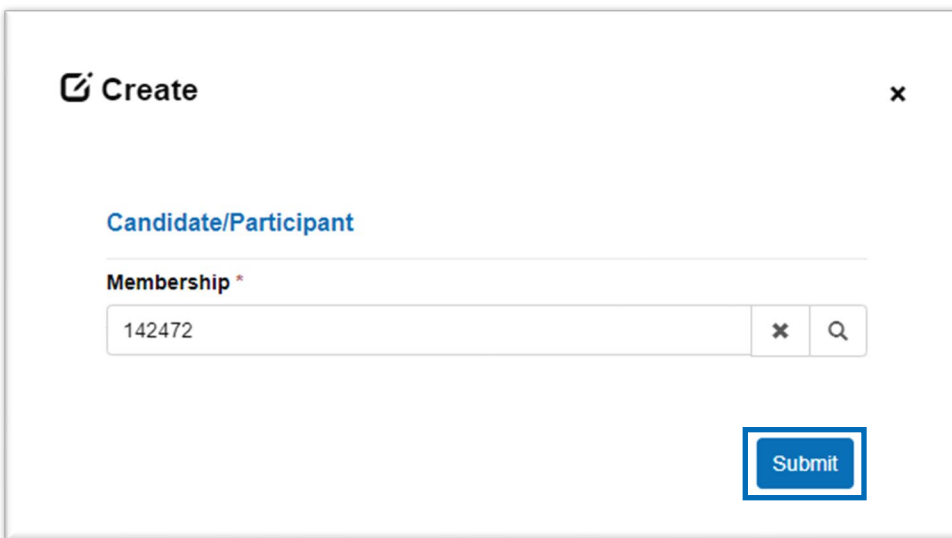
6.	Club admin	Portal	Click Submit.

The booking will display as Ineligible if the member does not meet the pre-requisites (i.e. age requirements).

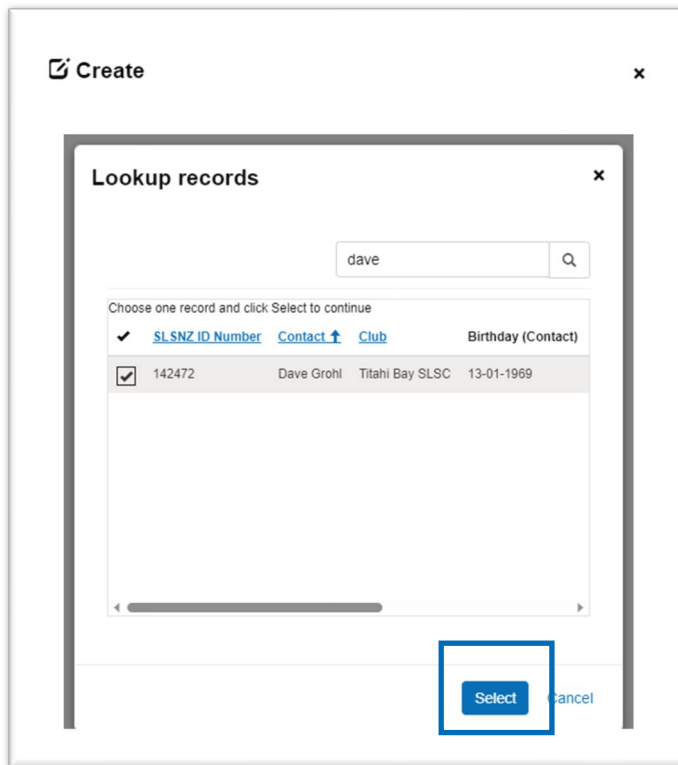Note: the staff member will be able to review any ineligible bookings and can over-rule this if the member is indeed qualified to attend.

Pending bookings will be confirmed by the administrator of the course and you will be notified either by the system or the admin if the member is not suitable for the course.

Club Patrols

Incidents
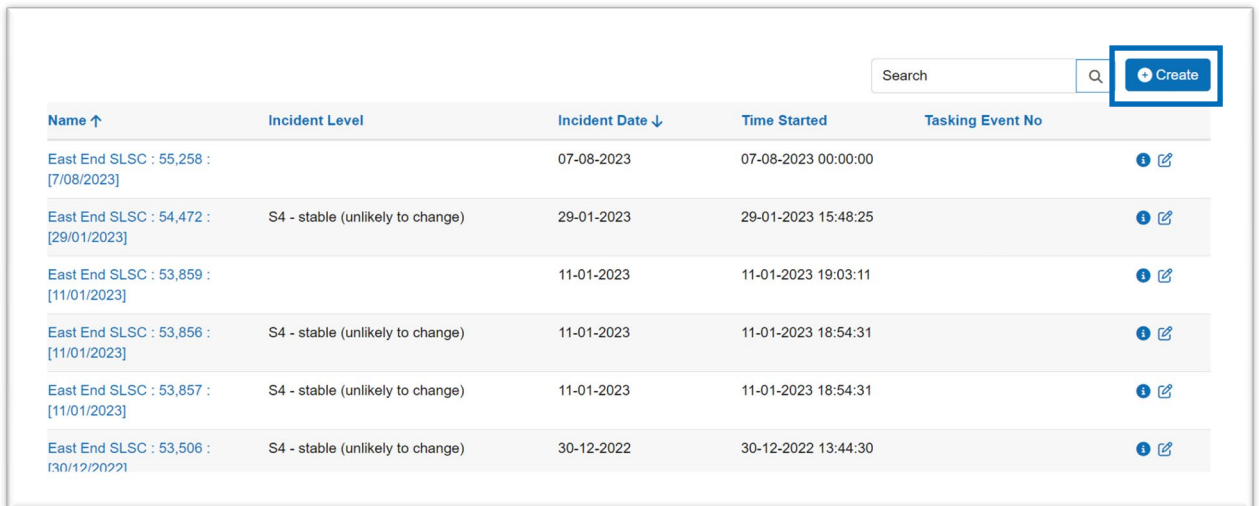
Web role required:	Patrol Captain

CREATE AN INCIDENT

Step	Person	System	Step
1.	Patrol Captain	Portal	Go to Club Patrols > Incidents
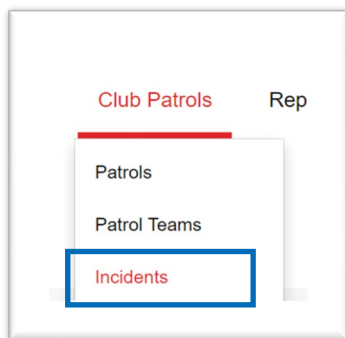
Step	Person	System	Step
2.	Patrol Captain	Portal	All incidents for your club will display. Click Create.

3.	Patrol Captain	Portal	Complete the following information: • Police Tasking Event Number – provided by emergency services (if applicable) • Club - click the magnifying glass to select your club. • Incident date • Incident Time Started / Incident Time Ended – once you click the date, you will need to go back into it and click the clock symbol to select the time. • Patrol Team - who were on duty at the time (if applicable) • Summary of Incident – the info from the Patient/Incident Notes section on the paper form. • Incident Level – provide a ranking from S0 – S4 (descriptions available on the dropdown menu) There are other fields on this page which are not compulsory but provide useful information. Please complete them if you can. When you have completed this form, scroll to the bottom, and click Submit.

✍ Create   ✕

Overview

Incident Form Number	Police Tasking Event No

Club *	Police Tasking Officer
[🔍]	

Incident Date *	Police Tasking Start Time
DD-MM-YYYY 📅	DD-MM-YYYY HH:mm:ss 📅

Location	Police Tasking Complete Time
	DD-MM-YYYY HH:mm:ss 📅

GPS or Grid Ref	Probability of Incident
	[˅]

Incident Time Started	Consequence/Impact
DD-MM-YYYY HH:mm:ss 📅	[˅]

4.	Patrol Captain	Portal	The Incident will now be displayed in the summary page. Click the edit button on the right-hand side.

Name ↑	Incident Level	Incident Date ↓	Time Started	Tasking Event No	
East End SLSC : 55,261 : [17/08/2023]		17-08-2023	17-08-2023 10:20:00		📝
East End SLSC : 55,258 :		07-08-2023	07-08-2023 00:00:00		ⓘ 📝

Add patients to an incident

Creating a record of a patient and saving them to the incident means that we can keep track of the demographics of the people involved in our incidents (i.e., gender and age) as well as people who may continuously require the attention of our lifeguards.

6.	Patrol Captain	Portal	Scroll down until you get to Patients. To add a patient, click Create.

✎ Edit   ✕

Patients

                                                                                      ⊕ Create

First Name ↑	Last Name	Incident Level	Age Range	Gender
There are no records to display.				

Members

                                                              ⊕ Create   ⑂ Associate

Full Name ↑	Personal Email

7.	Patrol Captain	Portal	Each patient needs to be added individually. Complete the details in the form and click Next at the bottom of the form.

8.	Patrol Captain	Portal	Select the reason(s) for the incident. Add a note if required, and when ready, click Next

9.	Patrol Captain	Portal	Select the outcome, then click Next. (More than one outcome can be selected.)

Outcomes

☐ Left in stable condition

☐ Referred to Doctor

☐ Assisted from Beach

☐ Ambulance to Hospital

☐ Helicopter To Hospital

☐ Deceased

☐ Unknown/Not found

[Previous] [Next]

10.	Patrol Captain	Portal	Select any equipment used, then click Next. (More than one treatment can be selected.)

Equipment & Treatment

☐ Defibrillator

☐ Oxygen

☐ Stretcher

☐ FA Supplies

Injury/Treatment Notes

[Previous] [Next]

11.	Patrol Captain	Portal	Complete the Vitals, ensuring the Form Completed By field is filled in, then click Submit.

Repeat this process for each patient.

Add members to an incident

12.	Patrol Captain	Portal	The quickest way to add a member to an incident is to click the blue Associate link.

13.	Patrol Captain	Portal	Locate the member(s) involved using the search box. Tick their record and click "Add". You can add more than one member at a time. The people you add must be members of the club at the time of the incident.

Lookup records

dave

✓	First Name ↑	Last Name ↑	SLSNZ ID Number	Birthday	Home Phone	Mobile Phone	Personal Email
☐	David			1991	.	022	
☐				1991			
☑	Dave	Grohl	142472	13-01-1969			
☐	Dave						

Selected records

Judy✖ Johnny✖ Dave✖

Add   Cancel

> The people you add must be members of the club at the time of the incident. Johnny is a member of the club, but not at the time the incident happened, so his record will not be shown in the next step.

14.	Patrol Captain	Portal	Click Submit.

Patients

⊕ Create

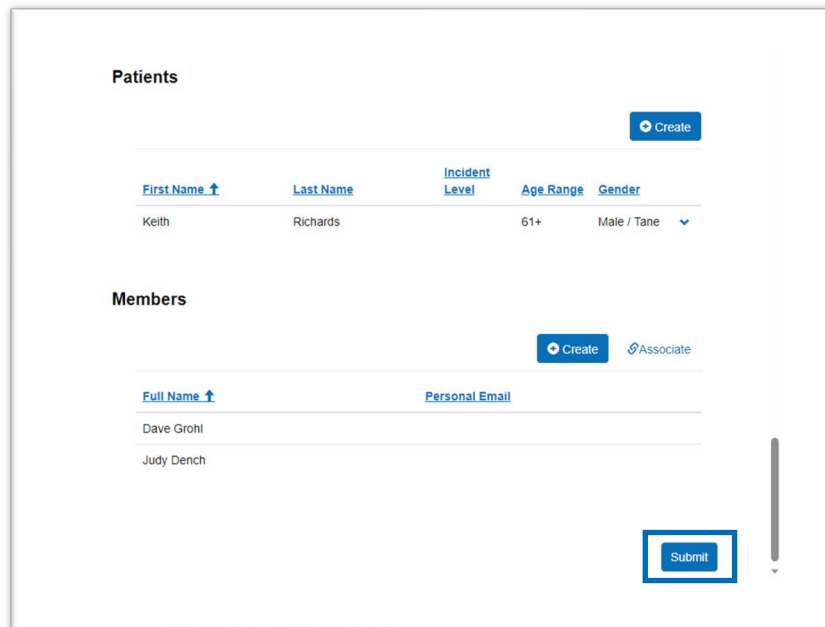| First Name ↑	Last Name	Incident Level	Age Range	Gender
Keith	Richards		61+	Male / Tane ⌄

Members

⊕ Create   ⧉ Associate

Full Name ↑	Personal Email
Dave Grohl	
Judy Dench	

Submit

Patrol Teams

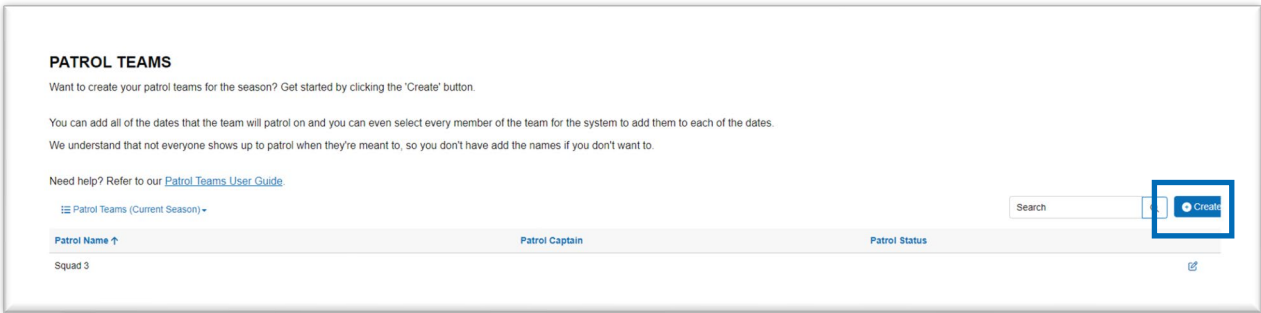| Web role required:	Patrol Captain

Points to note:

1. This is the pre-patrol (planning) stage.
2. Create all of your patrol teams for the season, then add members to the team and the dates that the team will patrol on.
3. When you assign members to a patrol team, the member will then be able to see it under Member Lounge > My Patrols.
4. This information can be added at the beach via the Surf Patrol App provided you have internet connection.

CREATE A PATROL TEAM

Step	Person	System	Step
1.	Patrol Captain	Portal	Go to Club Patrols > Patrol Teams

2.	Patrol Captain	Portal	Click Create.

| 3. | Patrol Captain | Portal | Name the patrol. Select a captain by clicking on the magnifying glass and using the search function. Then click Submit. |

Add patrol team members

| 4. | Patrol Captain | Portal | To add team members, click the edit icon. |

| 5. | Patrol Captain | Portal | Scroll down until you see the Patrol Team Members heading. Click Create. |
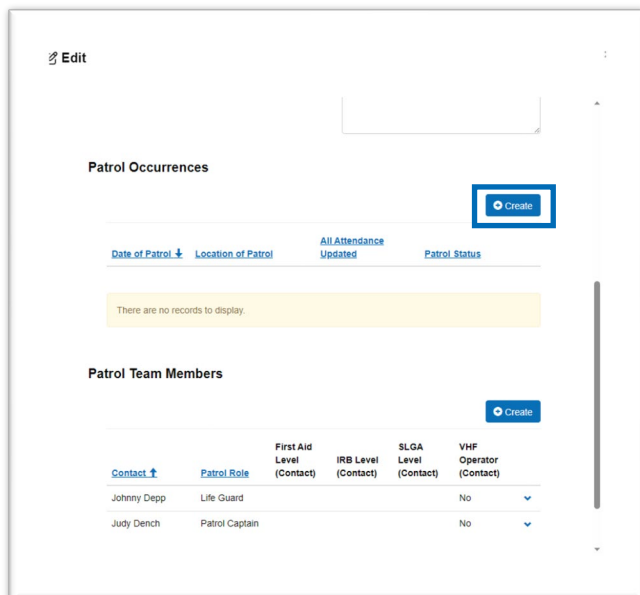
6.	Patrol Captain	Portal	Select a member by clicking the magnifying glass and using the search box.

7.	Patrol Captain	Portal	Allocate a role by selecting one from the drop-down box.

8.	Patrol Captain	Portal	Click Submit.

Repeat for each team member.

Schedule a patrol

9.	Patrol Captain	Portal	Once your team members have been populated, scroll back up to Patrol Occurrences. Click Create.
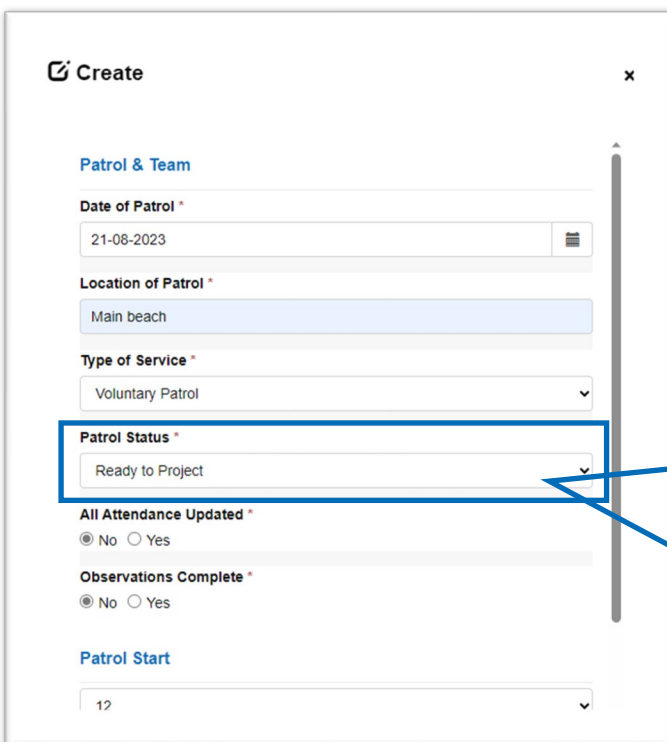
10.	Patrol Captain	Portal	Complete the patrol information.

If you have finished completing this form, change the Patrol Status to *Ready to Project*.

Otherwise leave as *Draft*.

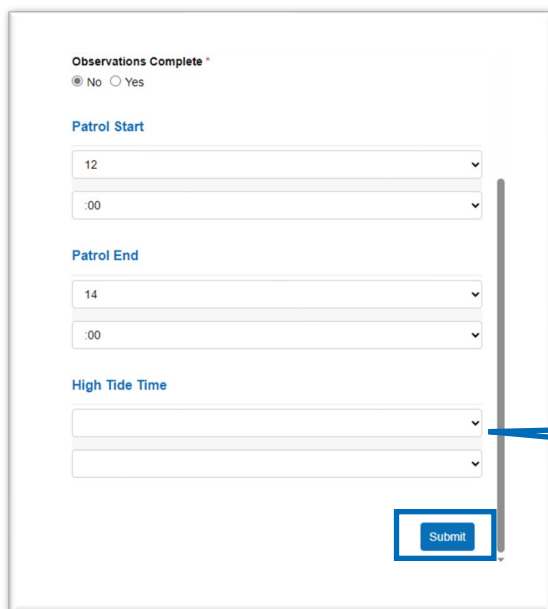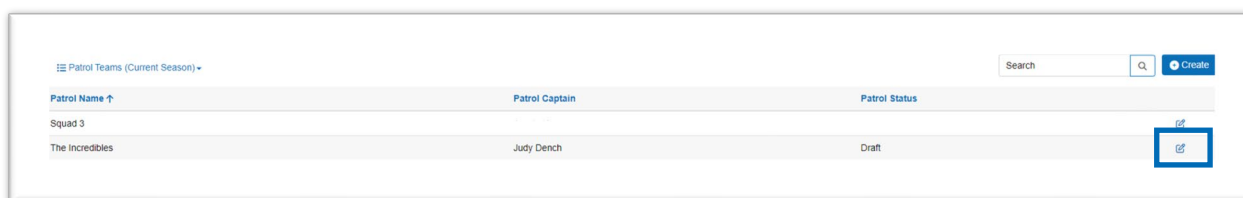| 11.	Patrol Captain	Portal	Scroll to the bottom and click Submit. If you want to save the information completing it, you can click Submit while it is in Draft and come back later to complete it.

Observations Complete *
◉ No ○ Yes

Patrol Start

12

:00

Patrol End

14

:00

High Tide Time

High tide time is a required field.

Submit
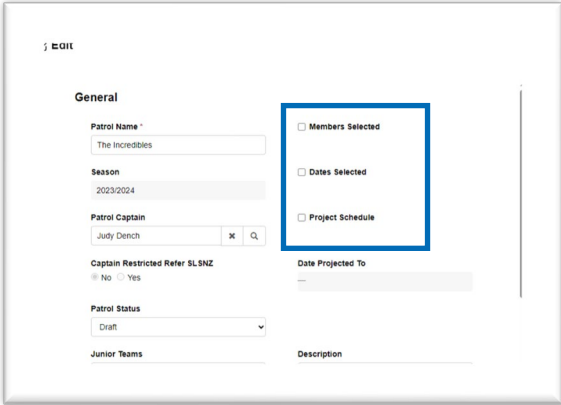
Send patrols to team members
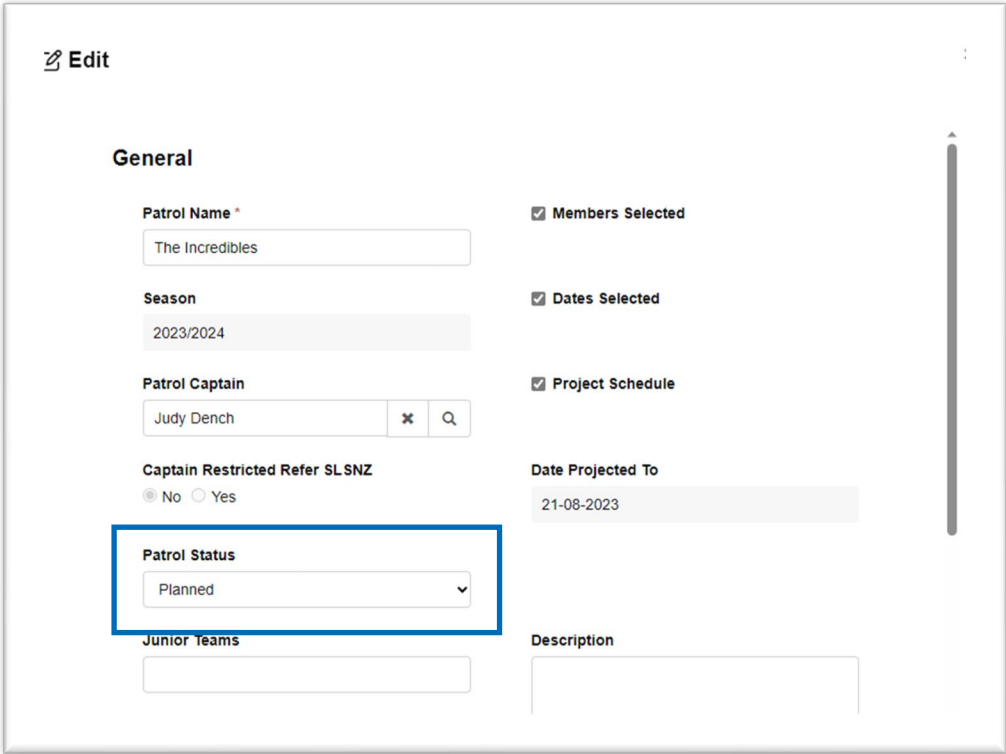
12.	Patrol Captain	Portal	This step should only be done when you have added all the patrols for the team, and each Patrol has been marked as Ready to Project. Back on the Patrol Teams page, click the edit icon next to the team.

Patrol Name ↑	Patrol Captain	Patrol Status	
Squad 3			
The Incredibles	Judy Dench	Draft	

Patrol Teams (Current Season) ▾   Search 🔍   ⊕ Create

13.	Patrol Captain	Portal	Tick the following fields: Members selected Dates Selected Project schedule
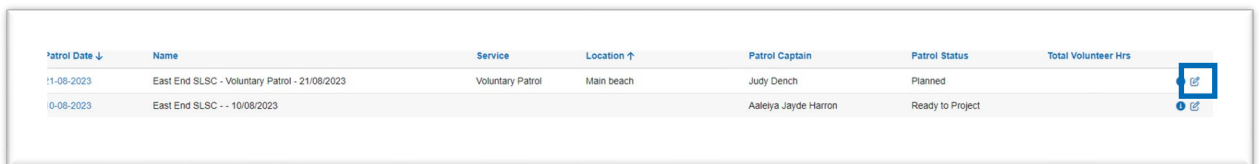
14.	Patrol Captain	Portal	Change the Patrol Status to Planned. Scroll to the bottom and click Submit.

UPDATING PATROLS

Step	Person	System	Step
1.	Patrol Captain	Portal	Go to Club Patrols > Patrols

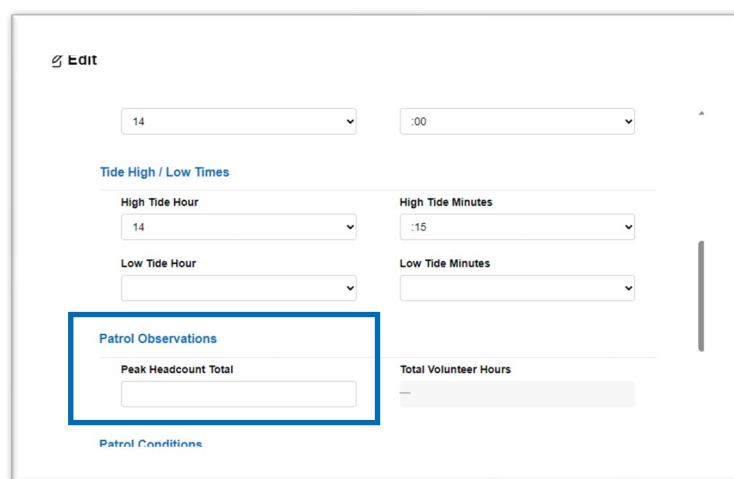| Step	Person	System	Step
2.	Patrol Captain	Portal	You will see a list of the patrols for the current season. Locate the patrol you want to edit – you can search for it or order by date. Click on the blue edit icon.

Step	Person	System	Step
3.	Patrol Captain	Portal	Complete the Patrol Observations: Peak Headcount Total

4.	Patrol Captain	Portal	Complete the Patrol Conditions using the drop-down list

5.	Patrol Captain	Portal	If there are any changes to a person's attendance you can change this by clicking the blue arrow next to their name and selecting Edit.

6.	Patrol Captain	Portal	Add a head count by clicking the blue Create button in the Head Counts section.

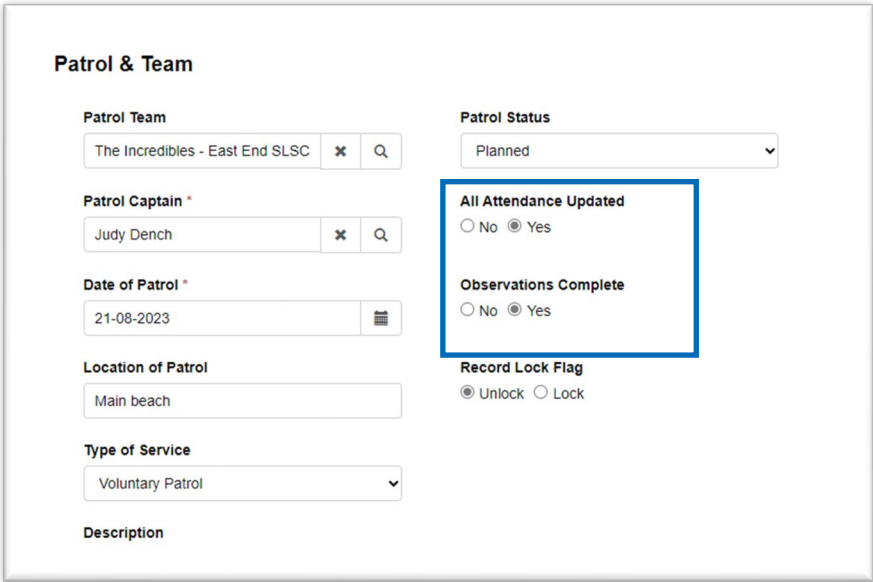| 7.	Patrol Captain	Portal	Enter the Beach Count, Water Count, and the time the count was taken. Click Submit. Repeat this for every head count taken.
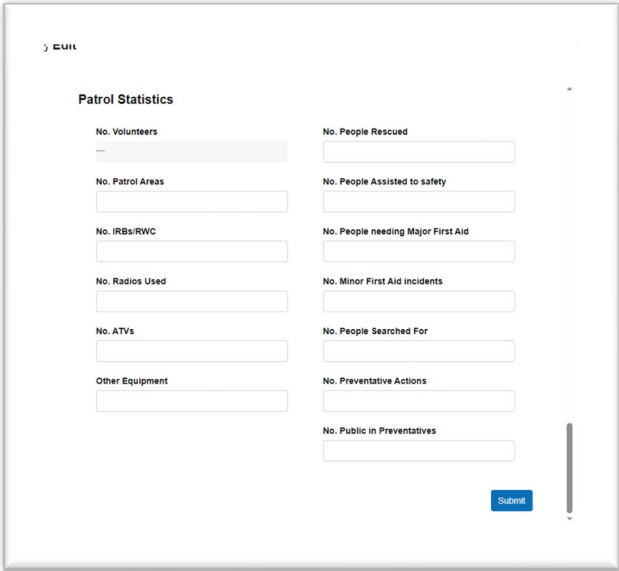
8.	Patrol Captain	Portal	Scroll to Patrol Statistics and complete any applicable information. Click Submit.

COMPLETING FINAL DETAILS

Step	Person	System	Step
1.	Patrol Captain	Portal	Go back and edit your Patrol. o Select Yes in the following fields: All Attendance Updated o Observations Complete Scroll to the bottom and click Submit.

If the club wants to set up the Patrol Captains so that they can use the Surf Life Saving App to enter the patrol data in the portal, please contact database@surflifesaving.org.nz. The administrator can go in and change the status of the patrol at any time but most changes will not need this.

Other Notes:

• To change the information in the Patrol and Team you will need to set status back to draft.

• To update attendance after the box has been ticked, untick the box, update the information you need to update then re-tick the all attendance update box.

• There are a couple of options for the attendance of a person on patrol:

     o Attended – The person was at the patrol

     o Advance Withdraw – The person has found a replacement for the patrol. There is the ability for the member to do this through their portal if the club wants to use this option.

     o No Show – use if the person does not show up and does not call in prior. It is up to the club to decide how they manage this function.

• Email reminders – The club can choose to have email reminders sent to their members on Wednesday prior to the patrol. Contact database@surflifesaving.org.nz to have this turned on for your club.