



# SLSA Family Groups – Existing Member’s User Guide v1

19 August 2015



# Contents

<b>Terminology</b>	<b>3</b>
<b>Overview</b>	<b>3</b>
Other information .....	3
Getting Started .....	4
<b>Existing Members – How to Create a Family Group</b>	<b>4</b>
<b>Problem</b> – The Members Name is Not Appearing in the Available Members List .....	5
<b>Managing your Family Group as a Primary Member</b>	<b>5</b>
How to Promote or Add a New Primary Contact to a Family Group .....	6
How to Demote Yourself as a Primary Member of the Group .....	6
Standard Member Functions in Family Groups .....	7
<b>Managing Family Data</b>	<b>7</b>
How Do I Renew My Family Group Membership .....	7
How Do I Edit/Update Details for all Members of the Family Group at Once? .....	8
How Do I Request a Transfer of my family to another Club? .....	8
What if I want to join up a NEW member of my family to this club? .....	8

## 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 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** – Is 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.

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.
- Standard members of a group must be under 18 years of age.
- A Family Group can only exist where there is at least one Primary and one Standard member.
- A standard member will be automatically removed from a group when they turn 18 years of age.
- A Primary member must be over 18 years old.
- 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

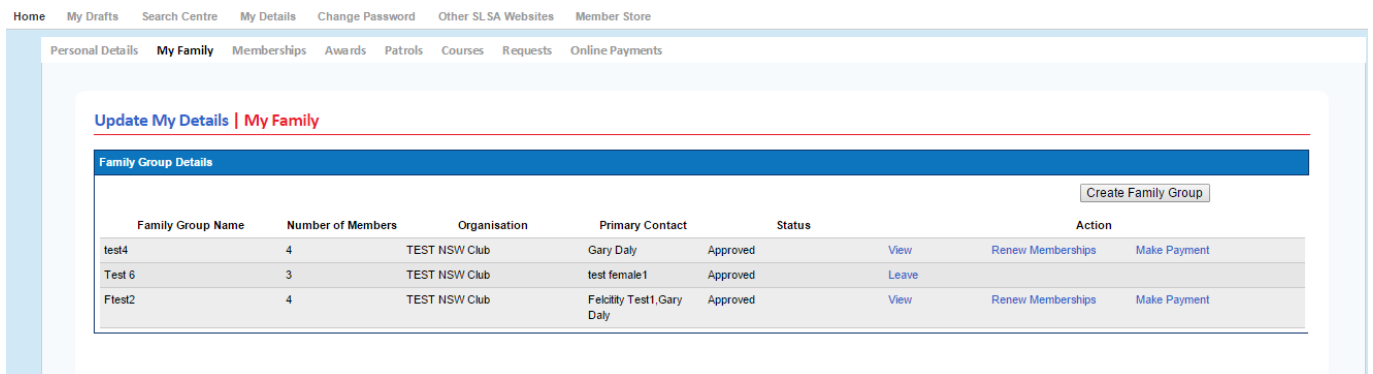
To use Family Group member functions in LSO via the Members Portal:

1. All family group members need to be in Surfguard and members of the same club as the Primary member
2. 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
3. The Club must approve the Family Group BEFORE the Primary member(s) can manage the group via LSO in the Members Portal.

## Existing Members – How to Create a Family Group

Members can create a family Group by clicking 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 and the Names of each member you want to add to the family group.

**NOTE:** 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.

**Create a Family Group**

**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 dd/mm/yyyy

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 2 main 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. 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.
4. Once submitted successfully the following will display

### Success

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

5. Your club will need to approve the Family group. You will not be able to manage the group until the club has done the approval, however you **CAN perform the RENEW MEMBERSHIP and MAKE PAYMENT**

## 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

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	<a href="#">View</a>	<a href="#">Renew Memberships</a>	<a href="#">Make Payment</a>	
Cocks Family	3	Clovelly SLSC	Rebecca Cocks	Approved	<a href="#">View</a>	<a href="#">Renew Memberships</a>	<a href="#">Make Payment</a>	

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
- Dissove the Family Group
- Promote a Stanard member to a Primary member
- Remove Members
- Edit Members

**Family Group Details**

**Cocks Family - Member Listing**

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

Member ID	Member Name	Membership Status	Season	Membership Category	Primary?	Status	Action
4564123	Damien Cocks	Active	2014	Active (18yrs and over)	No	Approved	<a href="#">Remove</a> <a href="#">Promote as Primary Contact</a> <a href="#">Edit</a>
4235719	Patrick Cocks	Active	2014	Active (15-18 yrs)	No	Approved	<a href="#">Edit</a>
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

Member ID	Member Name	Membership Status	Season	Membership Category	Primary?	Status	Action
4564123	Damien Cocks	Active	2014	Active (18yrs and over)	No	Approved	<a href="#">Remove</a> <a href="#">Promote as Primary Contact</a> <a href="#">Edit</a>
4235719	Patrick Cocks	Active	2014	Active (15-18 yrs)	No	Approved	<a href="#">Edit</a>
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

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 accounts > Lifesavng Online > My Family - view the 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					
Family Group Name	Number of Members	Organisation	Primary Contact	Status	Action
Cocks Family	3	Clovelly SLSC	Rebecca Cocks,Damien Cocks	Approved	Leave

[Create Family Group](#)

## Managing Family Data

### How Do I Renew My Family Group Membership

To renew all or some of your family members 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 <a href="#">Renew Memberships</a> <a href="#">Make Payment</a>
Cocks Family	3	Clovelly SLSC	Damien Cocks,Rebecca Cocks	Approved	View <a href="#">Renew Memberships</a> <a href="#">Make Payment</a>

[Create Family Group](#)

The screen below will display.

The Primary member will be able to select the members they want to renew for the upcoming season. Once members are selected for renewal 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.
- The member list will include all members in the family group including Primary contacts and will exclude members whose membership for the organisation is already pending for renewal.

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"/>	4564123	Damien	Cocks	1961-02-18	Active	Active (18yrs and over)	2014
<input type="checkbox"/>	4235719	Patrick	Cocks	1999-08-12	Active	Active (15-18 yrs)	2014
<input type="checkbox"/>	4625252	Rebecca	Cocks	1965-10-05	Active	Active (18yrs and over)	2014
				<a href="#">Submit</a>		<a href="#">Cancel</a>	

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 if you wish to pay online.** This link will take you to a payment website operated by a third party on behalf of SLSC.  
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 SurfGuard.

### 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 update My 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.

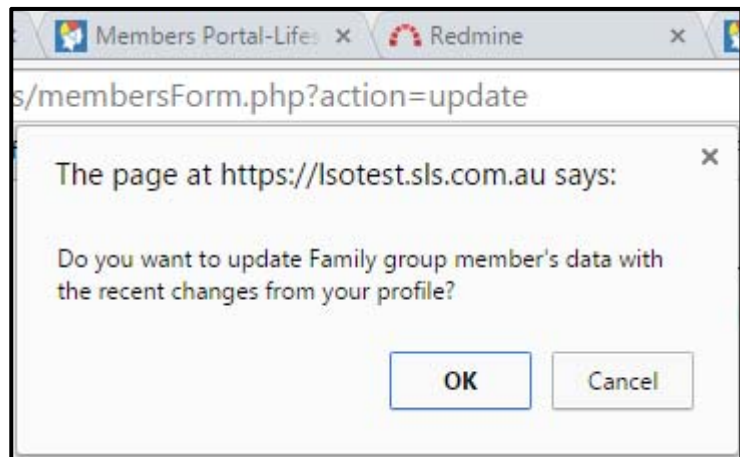
A pop-up will display on the screen

**Option 1** – Update Your Details Only

Action: Click Cancel

**Option 2** – Update All Family Group Members

Action: Click OK



You will be asked what data to share / copy with your family members.

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"/>

### 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 Lifesaving Online account, or arranged manually 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](https://sls.com.au/join) and enter and submit an application. You can add that person to your family group once their membership is accepted by the club.