Members Area User Guide

1 — Last update: 10 July 2024

Surf Life Saving Australia

Table of Contents

1. Overview

The Members Area is a one stop shop for all the organisation's member's online needs and can be accessed by all members who are entered in SLSA's National Membership Database, Surfguard.
NOTE: If you have submitted a new membership online form via **https://join.sls.com.au** and your request is still pending, you will not have full access to your Members Area account until your membership has been accepted by the club.

Main Features of the Members Area

• Update Personal Details
• Membership Renewal
• Request a transfer to another organisation
• View membership history
• View membership transactions
• View pending member requests
• View your Awards
• Print a transcript of your Awards
• View your patrol roster and patrol hours
• Submit a online Form for a Member Recognition Award
• Make a request for a Swap and accept other member's requests for a Swap in a patrol
• Download patrol roster in iCal format to a smart device
• Create and manage family groups
• Access eLearning- online learning platform
• Pay membership, course or carnival entry fees etc

Revision: 12 — Last modified: 5 February 2020

2. User Accounts

1. Details (First Name, Last Name & Date of Birth) are verified against those stored in the SLSA National Membership database, Surfguard. Enter your details exactly as they are recorded in Surfguard. Do not shorten your first name to Andy if the club has you registered Andrew.
2. The account holders identity is confirmed through SMS or email.
3. If a member wants to view their own Awards, patrol hours, arrange patrol substitutes or access courses via eLearning they must create their own Members Area account.
4. For the purposes of annual Membership Renewals and transferring a Family to another organisation a parent/guardian can create a Members Area account, create a Family Group (even if the family members have their own Members Account) and renew or transfer all members of the family group with one login.

Revision: 16 — Last modified: 29 May 2019

2.1 – Creating a Members Area Account

1. Browse to https://members.sls.com.au
2. You will see the option to create an Account highlighted in yellow
3. Enter the compulsory details: -

- First Name
- Last Name
- Date of Birth
- Gender
- Select Identity Confirmation Method, either email or mobile number, to which a unique code/or link will be sent. The email or mobile you use must be the same as the email/mobile in National Membership database (Surfguard).
- Create Username & Password
  ◦ You should click "Check" to make sure the Username has not already been taken.
  ◦ Your password cannot contain your first name, surname or username. It must be 6-12 characters in length, and must contain at least one letter and at least one number. It cannot contain any of the following symbols: – ' , + ? # " * \ & $%

4. Activating your Members Area Account
To ensure privacy and security, all accounts must be activated before they can be accessed. You will receive a confirmation code/ link by either email or SMS depending on the choice you made earlier.
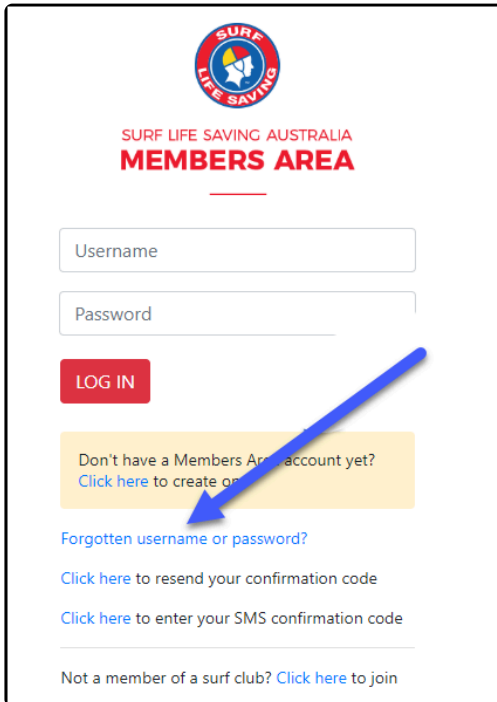
- **Email Activation** – you will receive an email with a link to activate your account. To activate either click the link or copy & paste the link into your web browser
- **Mobile Activation** – the next screen displayed will ask you to enter your username and password exactly as you chose it earlier, followed by the confirmation code you receive by SMS.

5. If you do not receive an SMS or Email, please click the "Resend Your Confirmation Code" option on the Members Area home page https://members.sls.com.au

Revision: 17 — Last modified: 29 May 2019

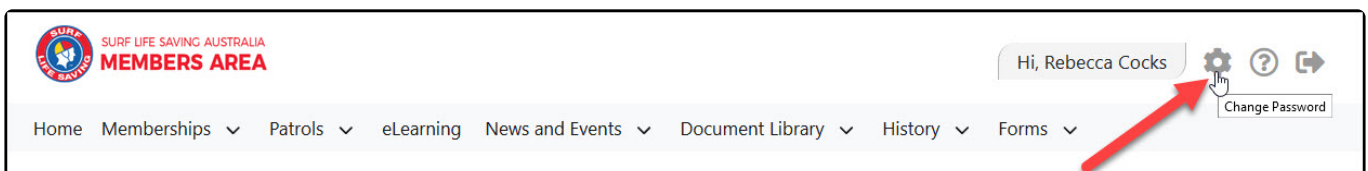# 2.2 – Forgotten Username or Password

If you forget either your Username or Password, click the reminder link on the login screen. Select either Email or SMS to receive your Username & / or Password and enter your First Name and Date of Birth

Revision: 5 — Last modified: 7 May 2019

2.3 – Updating Your Members Area Password

Once you have logged in with your temporary password you can always change your Password by clicking the Settings icon at the top right of the screen.

Revision: 2 — Last modified: 14 May 2019

2.4 Assigning Admin Functions to the Members Area

Clubs, State & National administrators/officers can be assigned specific Admin Functions for within the Members Area via the Officer position in Surfguard.

Note: If a member is in multiple officer positions in Surfguard they only need to update one officer

position with Admin Functions.

- Approve Members Area News Content (See section 7.3)
- Approve Member Area Library Content (See section 8.2)
- SLSA online Member Store/Shop Administrator (See section 4.6)
- Online Form Approver (See section 10.2)

To access Officer Positions in Surfguard go to Organisational Management > Officer > Officers
Click **Edit** for the Officer that you wish to assign Members Area Admin functionality to.

Tick the box next to the Admin Functions you want to assign

3. Home

Highlights key information relating to the member, including

- Membership/s still requiring renewal
- Link to renew your Family Group
- Upcoming patrols
- Expiring Awards
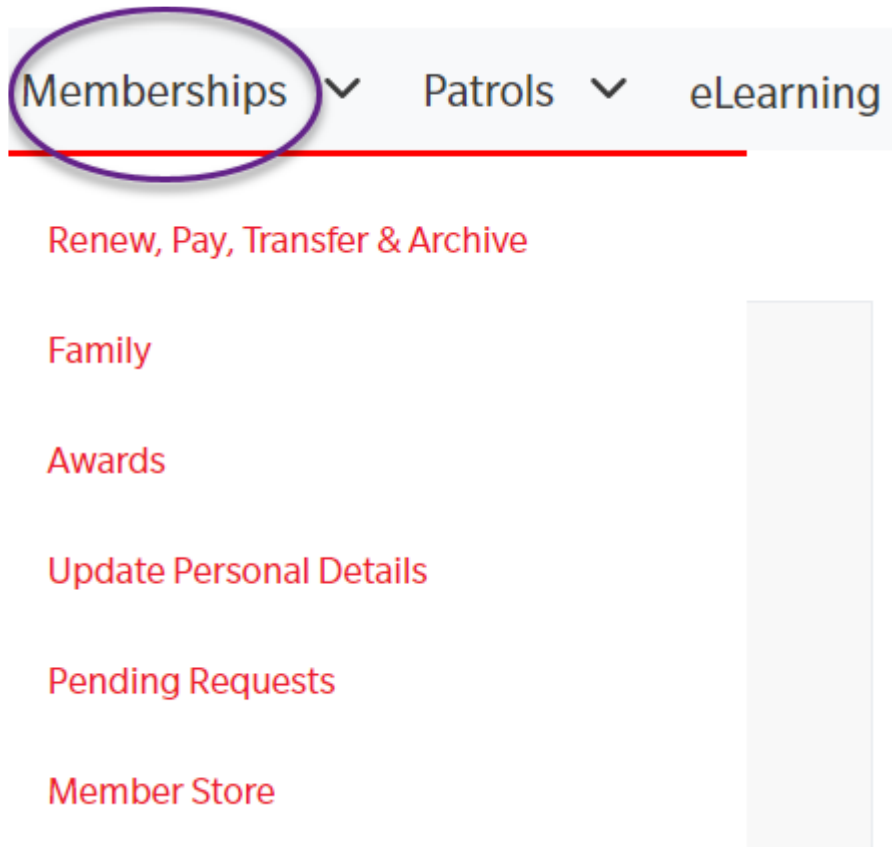- Patrol Hours
- Pending Requests
- Making a Payment

Revision: 7 — Last modified: 10 July 2024

4. Memberships

The Membership tab drop-down includes the following options:-

- Renewal, Pay, Transfer & Archive
- Create & Manage Family Groups
- View Award Details
- Update Personal Details
- View Pending Requests
- Access the Member Store

4.1 – Renew, Pay, Transfer & Archive

On this screen a member will be able to view all the organisations they currently hold membership with. The screen also allows for the user to 1) renew membership, 2) instigate a transfer, 3) make a payment , 4) request to have their membership archived or 5) submit a request to change their membership category.

My Memberships

Below are the organisations you have memberships with at SLSA. To renew a Membership for a Surf Club please click on the "Renew" link.

If you would like to **APPLY FOR MEMBERSHIP** at a new organisation, please click **Join / Transfer to a new organisation**. ②

SURF CLUBS

South Maroubra	
Branch	Sydney Branch
State	Surf Life Saving NSW
Registered Season	2022
Membership Category	Life Member
Competition Rights	Yes
Competition Age Category	Masters 55+
Working with Children Registration Expiry Date	06/03/2025
National Police Check Expiry Date	
Online Payments	MAKE PAYMENT ③

① Renew   Change Category   Archive

SLSA Events Club	
Branch	SLSA Events Branch
State	Surf Life Saving WA
Registered Season	2022
Membership Category	Life Member
Competition Rights	No
Competition Age Category	Masters 55+
Working with Children Registration Expiry Date	
National Police Check Expiry Date	
Online Payments	Contact club for payment options

Renew   Change Category   Archive ④

Test NSW Club	
Branch	Test NSW Branch
State	Surf Life Saving NSW
Registered Season	2022
Membership Category	Active (18yrs and over)
Competition Rights	No
Competition Age Category	Masters 55+
Working with Children Registration Expiry Date	06/03/2025
National Police Check Expiry Date	⑤
Online Payments	Direct Deposit Information

Renew   Change Category   Archive

Renew Membership

1. Click **Renew**
2. Check the Season field shows the correct renewal season. This season is 2024/25
3. Click Submit
4. Select the desired Membership fee
5. Click Next
6. Select any 'add on' fees if applicable
7. Click Next
8. Review your summary order
9. Fill in the Payment Details (the payment section will appear if your club has 'enforced credit card payments')
10. Tick the appropriate declarations boxes
11. Click Next
12. If your submission is successful a confirmation screen will display advising the renewal request is pending approval by the club.
13. If your club is not enforcing credit card payments then once you have submitted your renewal application click the words **'MAKE PAYMENT'** and the system will direct you to the SLSA Payment Gateway or show you the clubs banking details.

Join/Transfer to a New Organisation

To apply to join or transfer to a new organisation click "Join/Transfer to a new organisation" link on the

Memberships screen. To join a surf club or to transfer to a different club, choose the first option. You will then be required to choose from the following three transfer options: -

• **Full Transfer (Leave your current club)** – means moving your membership to a different surf club. Once your application is approved, you will no longer be a member of your current club. If you select this option and are presently a member of more than one club, you will be asked to select the club you wish to leave.

• **Competition rights transfer** – Keep your membership at your current club(s) but move your competition rights to a new club. You will then have dual membership.

• **Non-competition rights transfer** – Join another club, while keeping your membership and your competition rights at your current club. You will then have dual membership.

Note: This transfer facility merely initiates the transfer process. The transfer itself depends on endorsement from both your current club, the new club and Branch or State approval.

Online Payments

Members can pay for a range of transaction, including; Membership, Gym, Courses & Training Manuals, Merchandise, Lockers and Functions. Each SLS organisation determine the forms of payment they accept and may include: – Cash, cheque, online payments via the SLSA Payment Gateway, Direct Deposits or EFTPOS facility.

Change Membership Category

If a member believes they are eligible for a change in membership category due to their age or years of patrol service they can submit an online request to Change their membership category. Once the change category is submitted a pending request will be sent to the organisation for approval. The change will not occur until the request has been approved

Revision: 16 — Last modified: 10 July 2024

Revision: 6 — Last modified: 9 July 2024

4.2 – Family Groups

From the Memberships tab drop-down select **Family**
The screen will show any family groups that you are attached to.
If no family group is showing then create one.

1. Creating a Family Group

1. Click **Create Family Group** and type in a Family Group name eg: Smith Family
NOTE: You (the primary member) are automatically placed in the family group so you only need to add your other family members.
2. Type in the First Name, Last Name & DOB of a family member that you wish to add to our Family Group, tick the box Include Archived Members and click Search.
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 family members, contact your club who can assist.
3. If the system locates your family member they will be displayed in the **Available Members** on the left-hand side. Highlight the name and using the **>** arrow key move them over to the **Selected Members** on
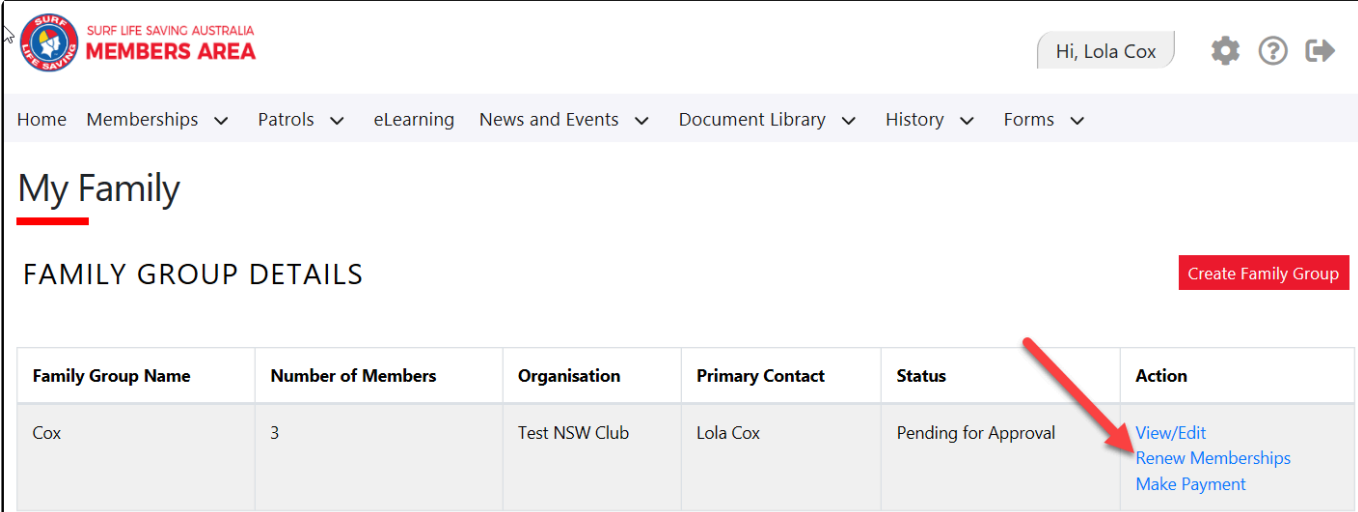
the right-hand side. Repeat as necessary for additional family members.

4. Scroll to the bottom of the screen and click Submit.

5. Refresh your screen and you will now see that your family group has been created.

2. Renew Family Membership

Under Actions, click 'Renew Memberships'

- Tick the checkbox located to the Left of each members name that you wish to renew membership form
  NOTE: Check box will not appear against members who are already registered for the selected season or have already submitted an online renewal form.
- Click Submit
- Select the desired membership fee for each member of the family group.
- **Note:** If your club offers a family fee option then select the family fee for the first member of the family group ie: *$350 – Other – Family Membership* and then select *$0 – Other – Membership Fee* for the remainder of the family group. If no family fee option is available then select the appropriate fee for each individual family member.
- Select any 'add on' fees if applicable

- Click Next
- Review the summary
- Payments: fill in the payment details. **Note:** payment option will only appear here your club has enforced credit card payments otherwise the payment option will present after submitting your family renewal applications.
- Tick the box to agree to the SLSA Membership Declaration
  Click 'Submit'
  Upon submitting your Family Groups membership renewals the system will give the Primary Family Group user the option to update\share data with the family groups. If you need to update a family group members address, phone, email and/or emergency details click on the corresponding checkbox.
- 6. Click Yes or No
- 7. Once submitted you will be given the option to MAKE A PAYMENT if not already done so via Credit Card before submitting your applications.
- **NOTE:** you can pay for the whole family in one payment. The payment will be recorded against the primary member who was logged into the Members Area.

3. Add Another Existing Member to a Family Group

1. Under Actions, click **View/Edit**
2. Click **Add New Member**
3. Repeat steps 2 -5 in Creating A Family Group details listed above

4. Add Another Existing Member to a Family Group as a Primary Contact

1. Under Actions, click **View/Edit**
2. Click **Add New Primary Contact**
3. Repeat steps 2 -5 in Creating A Family Group details listed above

5. Join a Brand-New Member to the Organisation and Add Them to a Family Group

1. Under Actions, click **View/Edit**
2. Click **Join New Person & Add**
3. A pop up message will display advising **You will be directed to Join Surf Life Saving. Are you sure?** Click OK
4. You will then fill in the fields (first name, DOB etc) of the new member of the family that you wish to join up to your club and add to your family group.
5. Complete the pre-filled membership form (if need be), tick the declaration boxes at the bottom of the form and click the 'submit'.
6. A pending request for 'new club membership' and 'join member to a family group' will be sent to the club for approval.

6. Join/Transfer a Family Group to a new Organisation

1. Under Actions, click **View/Edit**
2. Click **Join/Transfer to a New Club**

3. The system will ask you to 'select your situation'. In most cases, you would tick the checkbox 'I want to join a surf club or transfer to a different surf club'.

4. Select the State, Branch and Club/Organisation (from the available drop-down boxes) name of the club that you wish to transfer to.

5. Tick the checkbox for the members of the family that you wish to transfer.

6. Select the type of transfer required, Full Transfer, Competition or Non-Competition transfer

7. To finalise the process, tick the declaration boxes at the bottom of the screen and click the 'submit' button.

7. Dissolve a Family Group

1. Under Actions, click **View/Edit**

2. Click **Dissolve Family Group** – The system will send a request to your club and will display in the Family Group as 'Pending Request-Dissolve Family Group' Note: The group will not be dissolved until endorsed by your club.

3. Once approved the Primary member of the dissolved group will receive an email advising of the action taken.

Frequently Asked Questions (FAQ's)

• A Family Group is a 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 legal standing to manage the Group.

• Family Groups consists 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

• Email 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 via Pending Requests in Surfguard

• 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

• 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 Members Area 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 in the Member Area is not compulsory.

Revision: 47 — Last modified: 10 July 2024

4.3 – Awards

- Members can view all their SLSA awards.
- If a member is not proficient in an award it will be flagged in red with the award expiry date.
- This page can be filtered by all the primary headings or a member can use the search function to find a specific Award.
- A member can also print a full transcript of their awards.

Revision: 3 — Last modified: 29 May 2019

4.4 – Update Personal Details

- At any time members can submit a request to update their personal details. eg. Email, mobile or address details change. The request will generate a pending request for their club to approve in Surfguard.
- If the member submitting the details is a primary contact of a family group they will be prompted to update the details for other family members. The primary contact will be asked what data to update with other family members and will be required to tick the boxes for the data they want to have updated in their family group members profiles.
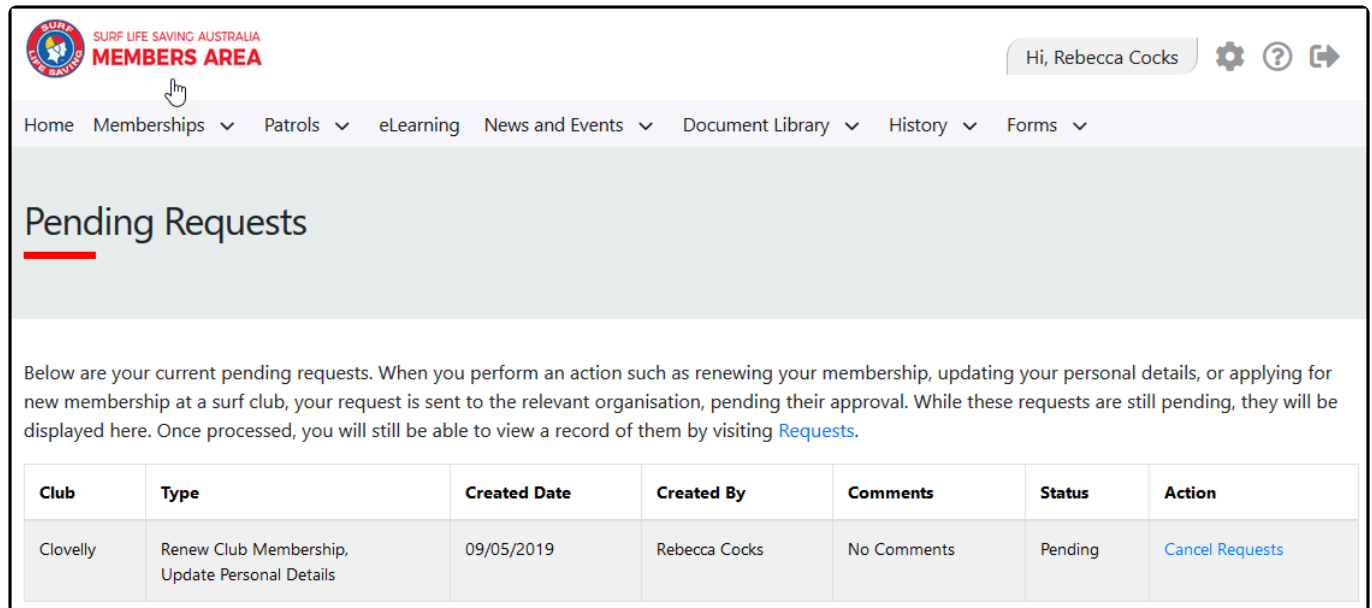
Revision: 4 — Last modified: 29 May 2019

4.5 – Pending Requests

Any request requiring approval by a club Officer, such as Membership renewal, update personal details,

change membership category, new family group or transfer requests are listed in this section.

Revision: 3 — Last modified: 28 May 2020

4.6 – Member Store

All Members

A range of SLSA merchandise is available for all registered members to purchase in the members store.

Club Administrators

Access to the full SLSA Shop for Club/Branch/Sate officers/Administrators can only be accessed if the Officer/Administrator has been assigned SLSA Online Member Store/Shop Administrator access via the Officer Positions in Surfguard. Once this is assigned the club Officer/Administrator will have two options to shop and pay by credit card for their purchases or to make purchases on behalf of their club and the club will be invoiced. See screenshots below

5. Patrols

Active patrol members can use the Patrol tab to:-

- View patrol hours accumulated,
- Check their patrol roster and
- Request or accept patrol swaps for a patrol at their club.

5.1 – Patrol Roster

The Patrol Roster sub-tab enables members to: -
• View their patrol roster by date, organisation, patrol team or patrols where a member has confirmed a swap.
• View their patrol dates on a personalised calendar
• Create a request for a "Swap" to do a patrol you are not able to do.
• Details of upcoming and/ or past patrol roster for the selected season

5.2 – Patrol Hours

The Patrol Hours sub-tab enables members to: -

• Access full details on all patrol hours entered in Surfguard

• Find out exactly how many patrol hours they have completed for specific dates eg Competition year.

My Patrol Hours

Display Options

Last Year	This Year	
01/01/2018	26/06/2018	Update

CLOVELLY

Date	Time	Hours	Patrol Info
Mon 01/01/2018	09:00 - 13:30	4.5	Rostered (Team 9)
Sun 07/01/2018	08:30 - 13:30	5	Rostered (Team 13)
Sat 27/01/2018	13:30 - 18:00	4.5	Rostered (Team 13)
Sat 03/02/2018	13:30 - 18:00	4.5	Voluntary (Team 4)
Sun 18/02/2018	08:30 - 13:30	5	Rostered (Team 13)

Total: 23.5 patrol hour(s)
5 records displayed.

Revision: 2 — Last modified: 30 May 2019

5.3 – Patrol Swaps

Patrol swaps enables members to indicate when they will be unable to attend a patrol and can invite other club members to swap for them. Club members can also accept to swap for another member who is unable to patrol. The Patrol swap performs the following: –

1. Displays an invite to eligible members in the club that a member needs a swap.

2. Enables a member to view swap requests they are eligible to perform based on the Awards they hold.

3. Enables members to confirm they can do a swap for another member.

4. Sends a notification email when a swap has been accepted

Getting Started

To use the Patrol Swap function members need to: -

1. Have a Members Area account – for more information on creating a Members Area account

2. Be in a Patrol Team and meet the Award requirements of the position they hold in the Patrol team.

3. Be rostered for Patrols for a date/s in the future

4. Meet any other club By-Laws relating to patrol swaps.

How to Request a Swap in a Patrol Roster

If a member is rostered for a patrol in the future and they need to get a swap they will see the following screenshot. They would need to click **"I need a substitute"**. A pop up will appear **"Do you want to**

request a substitution for this patrol?” Click "OK".

My Patrol Roster

Display Options

Patrol Season: [2018/2019 ▾]

Group By: ○ Date   ○ Organisation   ● Patrol Team
                 ☐ Display only patrol where I'm substituting for someone else
                 [Update]

CLOVELLY
Patrol Team: Team 13
Position: Bronze Member

Sat 06/10/2018	09:00 - 13:00 (4 hrs)	Rostered	I need a substitute
Sun 04/11/2018	09:00 - 13:00 (4 hrs)	Rostered	I need a substitute

The screen will now update and display as "Requesting Substitute".

CLOVELLY
Patrol Team: Team 13
Position: Bronze Member

Sat 06/10/2018	09:00 - 13:00 (4 hrs)	Requesting Substitute	
Sun 04/11/2018	09:00 - 13:00 (4 hrs)	Rostered	I need a substitute

How to View the Status of a Swap Request or Cancel the Request

At any time a member can check the status of a requested swap by clicking **"Substitutions"** from the drop down. The screenshot below shows:-

1. A Patrol that still requires a swap.
2. How to cancel the request for a swap.

Substitutions

Patrol Season: [2018/2019 ▼]
Group By: ○ Date   ○ Organisation   ● Patrol Team
                 [Update]

Below are details of your upcoming patrols for which you've requested for substitution

Club: Clovelly
Patrol Team: Team 13
Position: Bronze Member

Date	Time	Status	Person/sub, Agreed, Contact	Actions
Sat 06/10/2018	09:00 - 13:00 (4 hrs)	Requesting Substitute **1**		Remove **2**

How members can see who needs a Swap and how to accept the Swap

To view who needs a swap login to the Members Area > Patrols tab > Patrol Swaps. Scroll down until you see the section **"Below are details of patrols that other members have identified as needing a substitute"**. You will then be able to view who requires a swap including the date, time, Member, Team, Position and the option to confirm that you can do the swap. To accept the patrol click **"I can do this"**. A pop up will appear **"Do you want to accept the substitution request on this patrol?"** Click OK. Once accepted the patrol will no longer display in the section **"details of patrols that other members have identified as needing a substitute"**.

Below are details of all patrols that other members have identified as needing a substitute

Club: Test NSW Club - TEST
Patrol Team: IT Dept Best Team

Date	Time	Member	Position	Actions
Sat 30/06/2018	09:00 - 10:00 (1 hrs)	Travis Klerck	Patrol Captain	I can do this

How a member can see who they accepted a Swap for

In the previous example the member confirmed they could do a patrol in IT Dept Best Team on Saturday, 30 June 2018 0900-1000hrs. The member who accepted to do the swap can view this by clicking the Patrol Roster sub-tab and ticking the box **"Display only patrol where I'm substituting for someone else"** and click Update.

My Patrol Roster

Display Options

Patrol Season: 2017/2018 ▾

Group By: ○ Date ○ Organisation ● Patrol Team

☑ Display only patrol where I'm substituting for someone else

Update

Below are details of your upcoming and/or past patrol roster for the selected season.

TEST NSW CLUB - TEST

Patrol Team: IT Dept Best Team
Position: Patrol Captain; IRB Driver

Sat 30/06/2018	09:00 - 10:00 (1 hrs)	Substituting	*Undo*

Season Total: 1 patrol(s).

How to Cancel a Swap You Have Accepted
If a Member is no longer able to do the swap they can click the **"Undo"** option **(color-red) (see screenshot above)**. A pop up will then display **"Do you want to cancel your substitution on this patrol?" You'll no longer be able to perform this substitution".** Click OK. The swap patrol will then be removed from your patrol list.
NOTE: Clubs manage the time-frames for all swap functions in Surfguard. It is important to check with your club what the time-frames are at the club you patrol at.

The member who requested the swap will be able to view in their Patrols > Substitutions tab.

Display One – If person who accepted the Sub and has not clicked the "Undo"
The name of the person who has accepted the sub, the date & time they accepted it and their mobile number displays.

Substitutions

Patrol Season: 2017/2018 ▾

Group By: ○ Date   ○ Organisation   ● Patrol Team

Update

Below are details of your upcoming patrols for which you've requested for substitution

Club: Test NSW Club
Patrol Team: IT Dept Best Team
Position: Patrol Captain

Date	Time	Status	Person/sub, Agreed, Contact	Actions
Sat 30/06/2018	08:45 - 09:00 (0.25 hrs)	Substituted	06/28/2018 21:42:36, 04134	

Display Two – If person who accepted the Sub has clicked the "Undo"
The status reverts back to Requesting Substitute and indicates the Sub has been cancelled.

Substitutions

Patrol Season: 2017/2018 ▾

Group By: ○ Date   ○ Organisation   ● Patrol Team

Update

Below are details of your upcoming patrols for which you've requested for substitution

Club: Test NSW Club
Patrol Team: IT Dept Best Team
Position: Patrol Captain

Date	Time	Status	Person/sub, Agreed, Contact	Actions
Sat 30/06/2018	08:45 - 09:00 (0.25 hrs)	Requesting Substitute (Sub cancelled)		Remove

Patrol Swaps FAQ's

What happens if I get a confirmed swap and then I find out I am free to patrol?
Contact the member using the contact details provided in the Substitutions tab and ask them to Undo their confirmed sub. Default display is 48 hours.
NOTE: Clubs manage the time-frames for all swap functions via Surfguard. It is important to check your club's time-frames

Is there a blackout period for when you can't "Undo" a swap you have confirmed?
The default blackout period is 48 hours prior to start of patrol.
NOTE: Clubs manage the time-frames for all swap functions via Surfguard. It is important to check your
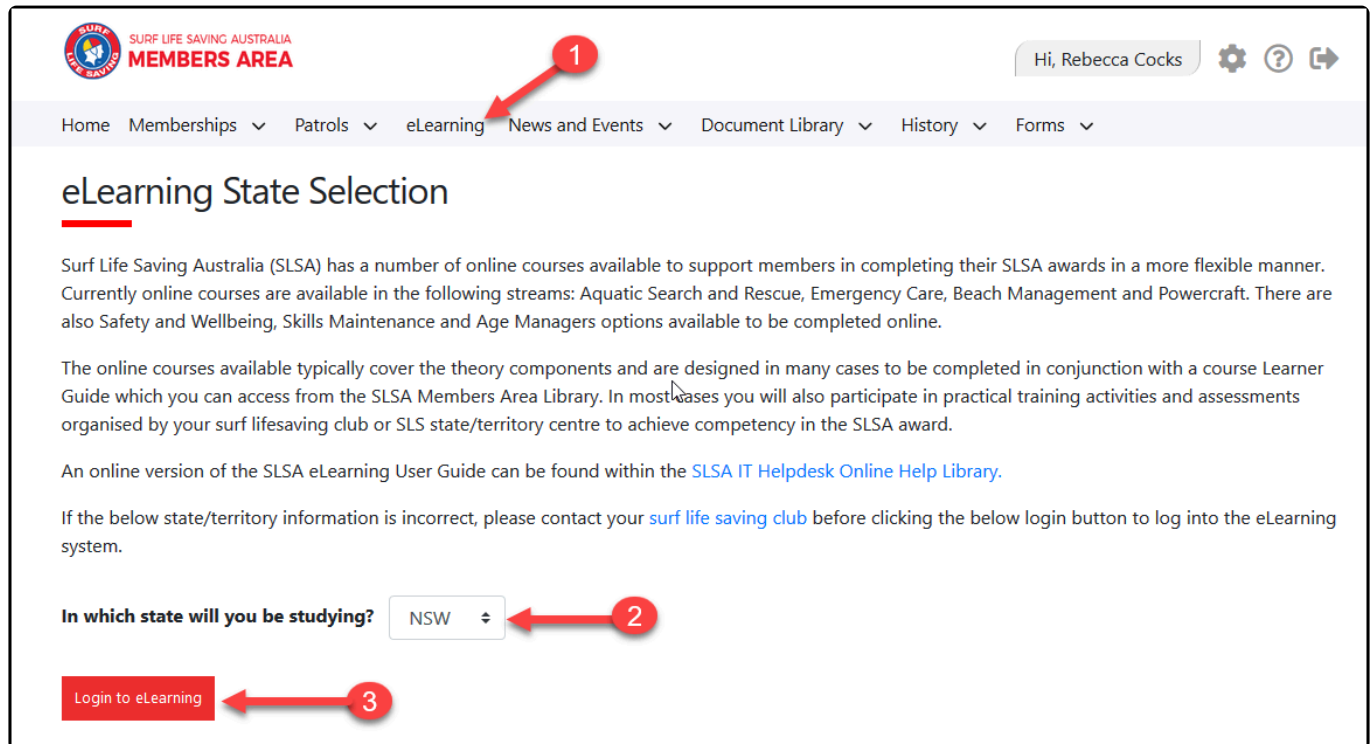
club's time-frames

6. eLearning

To access the suites of SLSA's online Courses:-

1. Click eLearning
2. Check your selected State is correct
3. Click 'Login to eLearning'
4. You will be redirected through to the eLearning

NOTE: You need to be an active member in the SLSA National Membership database (Surfguard) for the previous, current or next season to have access to the eLearning.

To access the SLSA eLearning Guide Click Here

To access the LSV & TAS eLearning Guide Click Here

Revision: 20 — Last modified: 31 May 2019

7. News and Events

The News & Events tab has three options from the drop down; View, Create and Manage News & Events. Any member of the organisation can View and Create News and/or events, however, only Club/Branch/State & National officers/administrators who have been assigned 'Approve Members Area News content' in an Officer positions in Surfguard.

Members will be able to view and create News or Event articles at a Club, Branch (if applicable), State and National level. Members who have active memberships in multiple States will be able to create and view all Club, Branch (if applicable) and State articles for each State they hold membership in.
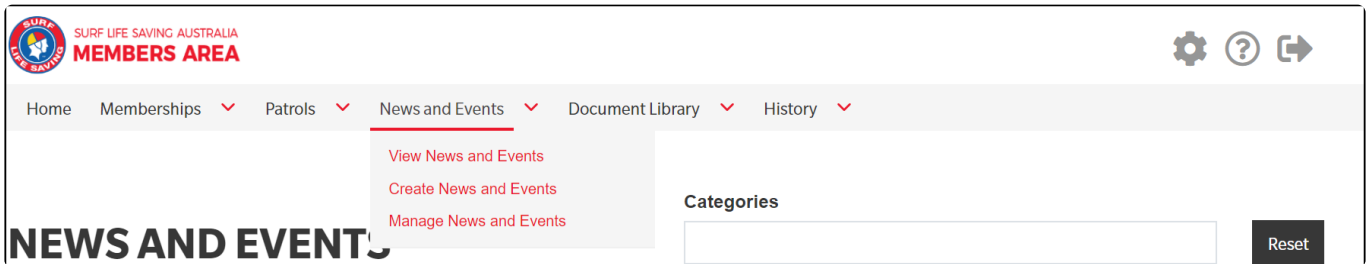
Revision: 3 — Last modified: 31 May 2019

7.1 – View News and Events

1. From the News and Events drop-down select View News & Events.

2. The default display for all News and Events is:- Organisation – Surf Life Saving Australia and the last uploaded document.

3. Members can filter by the following categories: –
• Sports
• Lifesaving
• Education
• Member Services
• Circulars/Publications
• Governance/Policies
• Administration
• WHS
• Other

4. News articles are displayed on the left-hand side of the page and Events are displayed on the right-hand side.

NEWS AND EVENTS

Categories

[   ]   [Reset]

News

SURF LIFE SAVING AUSTRALIA
SLSA Helpdesk News Article

Publish date 22 June 2018 9:50am

Sports

SLSA Helpdesk News Article

Previous | 1 | Next

Events

SURF LIFE SAVING AUSTRALIA
SLSA National IRB Championsihps

Publish date 22 June 2018 9:50am

Location Thirroul
Event Start Date: 12 July 2018 | Time: 12:00pm | **Event End** Date: 15 July 2018 |
Time: 12:00pm

Sports

SLSA IRB Championships

Previous | 1 | Next

Revision: 6 — Last modified: 22 May 2019

7.2 – Create News and Events

All SLSA members who have a Members Area account can create and submit a News or Event article. Any article submitted by the organisation that the article will be displayed at. Eg if the News item is to be displayed at a Surf Life Saving Australia level it will have to be approved by Surf Life Saving Australia.

Steps to Create a News or Events Article

1. From the drop-down menu click Create News & Events
2. Create your article by completing the Title, Summary, Description fields.
3. From the Type drop-down select either News or Event.
4. Set the Publish and Expiry dates and times. The default expiry date is set for 3 months from the publish date.

Publish date   **Expiry date**

[20 June 2018 11:00 AM]   [20 September 2018 11:00 AM]   [Reset dates]

5. From the Priority drop-down select either Normal or High. High priority articles are marked with an exclamation mark on the top right-hand side of the post and these articles also display higher than an article which is marked as a Normal priority.

SURF LIFE SAVING AUSTRALIA
SLSA Helpdesk Important Document!
Publish date 20 June 2018 11:49am

Lifesaving

Important Document

6. From the Organisation drop-down select the Organisation the article will display at (subject to
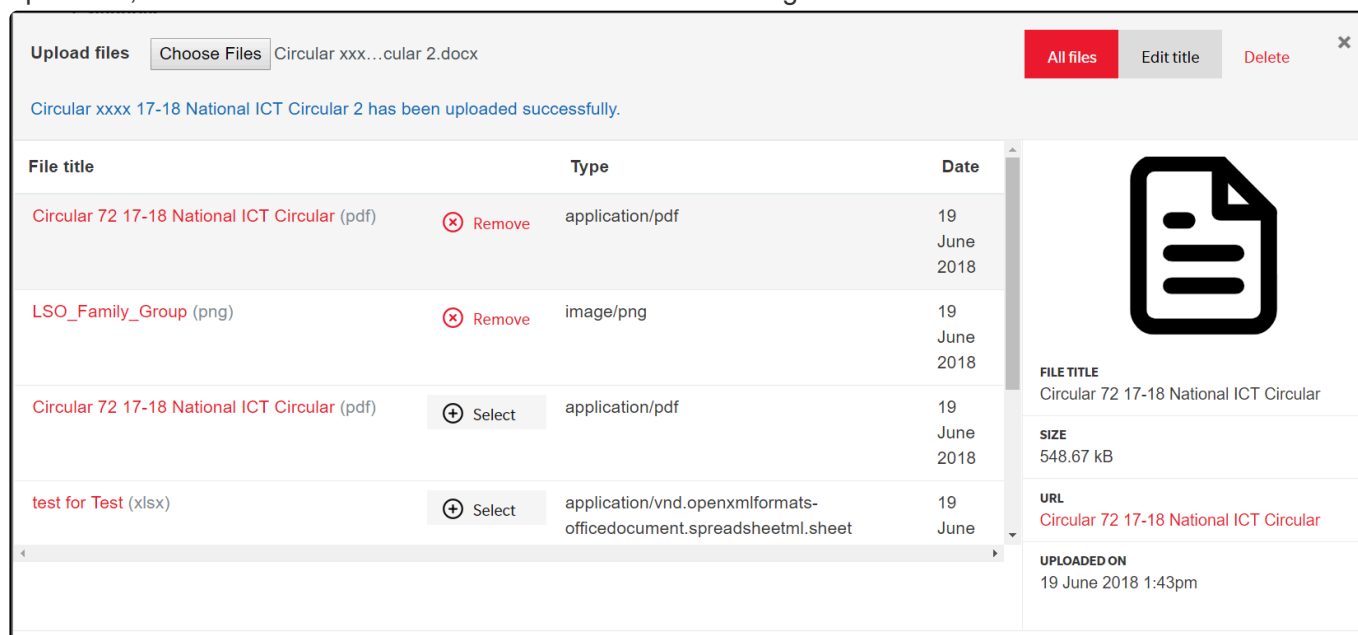
approval)

7. Select the Category, multiple categories can be selected by holding CTRL on your keypad and select each additional category.

8. Feature images can be uploaded. Feature images must be minimum 960 × 540 pixels and have a maximum file size of 20mb

9. Files can be attached to the article if required. A maximum of 3 files allowed.
Note: Club members with approval rights for News and Events and/or the Document Library will only have to upload a document once. Previously uploaded files will display when uploading to News, Events & Library. The most recently uploaded file will display at the top. To select a file that has previously been uploaded, find the file and click 'Remove' this will then change the status to 'Select'.

10. Once all fields are completed choose form either: –
• Save as Draft, or
• Save and Submit for Approval

11. If Save as Draft was selected in previous step the member can submit for approval using the Manage News & Events tab.

Revision: 5 — Last modified: 31 May 2019
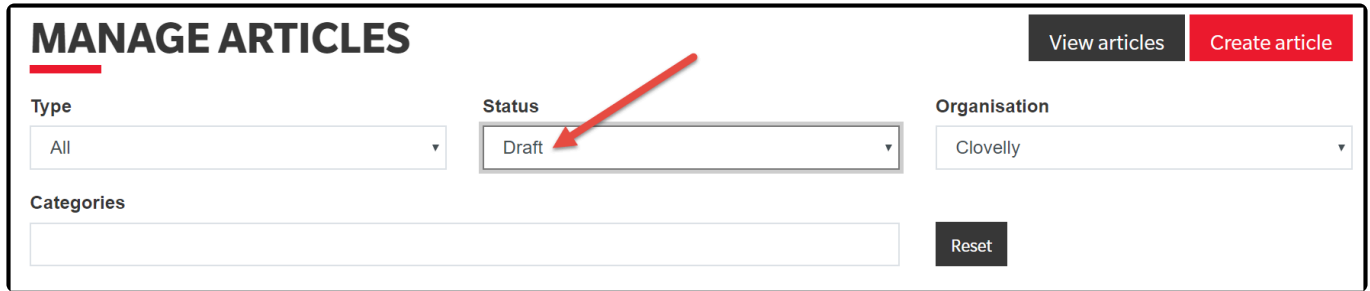
7.3 – Managing News and Events

This section can be used by: -
1. Members who have created a News or Event article and saved the article as a Draft and now want to submit it for approval.
2. Club/Branch/State/National Officers/Administrators who are the officer position in Surfguard as a News and Event content approvers
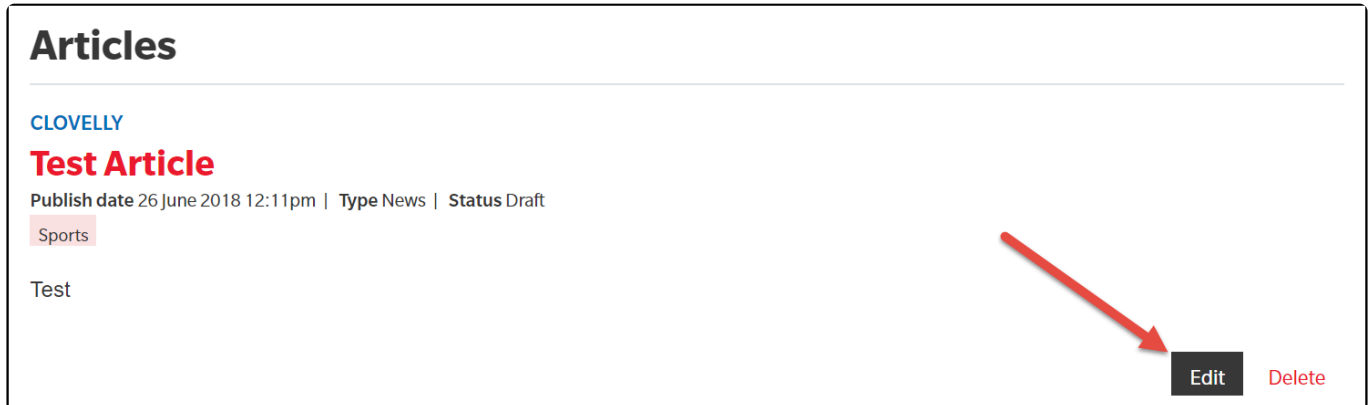
Members Viewing & Editing a Draft

1. From the drop-down menu click Manage News and Events
2. Make sure the Status displays Draft

MANAGE ARTICLES

| View articles | Create article |

Type
All ▾

Status
Draft ▾

Organisation
Clovelly ▾

Categories

Reset

3. Clicking 'Edit' will allow the draft to be amended

Articles

CLOVELLY

Test Article

Publish date 26 June 2018 12:11pm | **Type** News | **Status** Draft

Sports

Test

Edit   Delete
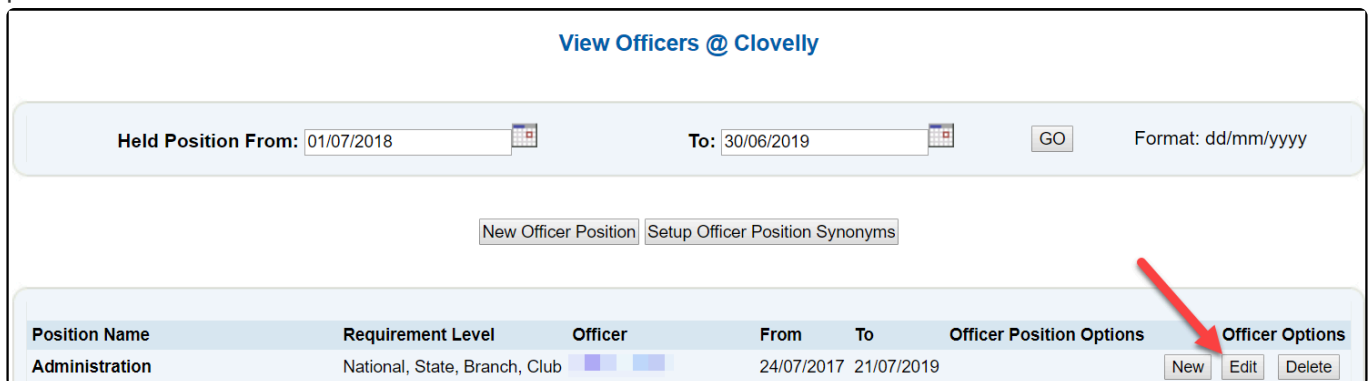
4. Amend the Draft as required and either: -
• Save as Draft, or
• Save and Submit for Approval

Assigning "Approve Members Area News Content " Function in Surfguard
Clubs, State & National administrators/officers will be able to approve News content as long as they are in an Officer position in Surfguard and have been assigned Approve Members Area New content
Note: If a member is in multiple officer positions in Surfguard they only need to update one officer position with admin functions.

View Officers @ Clovelly

Held Position From: 01/07/2018   **To:** 30/06/2019   GO   Format: dd/mm/yyyy

New Officer Position   Setup Officer Position Synonyms

Position Name	Requirement Level	Officer	From	To	Officer Position Options	Officer Options
Administration	National, State, Branch, Club		24/07/2017	21/07/2019		New Edit Delete

Approving, Editing or Rejecting News & Events Articles in the Members Area

1. From the drop-down menu click Manage News and Events

2. Filter by Type, Status, Organisation and Categories as required

3. Locate the article you wish to approve/edit/reject and click the **Red Title** of the article to view the details

SLSA Helpdesk Important Document!

This is very important regarding changes to the SLSA Members Area

ATTACHMENTS

Circular 72 17-18 National ICT Circular (pdf) 548.67 KB   ⬇ Download

STATUS
Pending approval

PRIORITY
High

TYPE
News

ORGANISATION
Surf Life Saving Australia

CREATED BY
Joshua Somerfield (5738326)

DATES
Created at: 20 June 2018, 11:47am
Updated at: 26 June 2018, 12:28pm
Publish date: 26 June 2018, 12:28pm
Expiry date: 26 September 2018, 12:28pm

CATEGORIES
Sports   Lifesaving   Education   Member Services
Circulars/Publications   Governance/Policies
Administration   Other

Back

4. Once you have reviewed the article click **Back**

5. Action accordingly using the Edit/Approve/Reject buttons.

NOTE: Once approved the article should generally appear instantly, if this is not the case please allow a couple of minutes for the article to upload and display.

Revision: 1 — Last modified: 22 May 2019

8. Document Library

The Document Library is simple, clean & current. It is no longer a repository of historical documents. Documents can only be uploaded by Club/Branch/State/National SLSA administrators/officers who have been assigned admin functions via Surfguard.
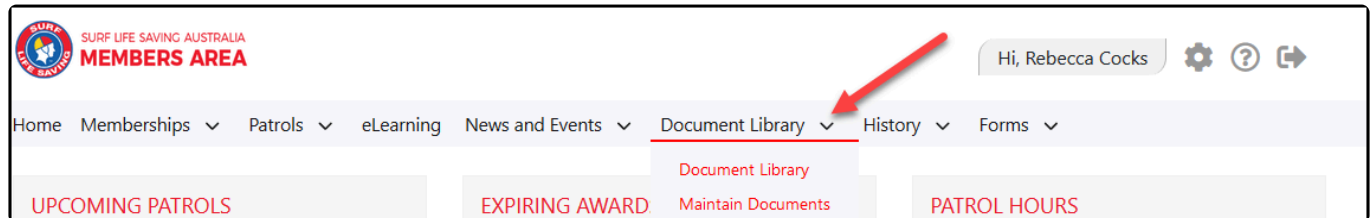
Revision: 5 — Last modified: 22 May 2019

8.1 – Finding Documents in the Library

1. From the Library drop-down select Document Library
2. Members can find documents in the library filtering by Organisation, Search, Sort by and Categories

- **Organisation:** Every member can see documents for their Club, Branch (if applicable), State and SLSA.
- **Search:** The new and improved search function allows for documents to be found easily.
- **Sort by:** Documents can be sorted by Most Recently Uploaded or Name A To Z
- **Categories:** The default is All, however, members can search for documents by a specific category. There are 9 main categories to filter by; Sports, Lifesaving, Education, Member Services, Circulars/Publications, Governance/Policies, Administration, Work Health & Safety, Nippers and Other.

3. You can view the library documents as a List or Grid. Image below is Grid view.
4. Documents displaying a padlock are Restricted Resources and can only be accessed by Members who hold a proficient TAF (Trainer, Assessor or Facilitator) Awards
5. Once the document is located it can be easily downloaded to your device by clicking the DOWNLOAD button.
6. You can share a document with another member by clicking the share icon. You will not be able to share a document with member who as selected Do Not Send Email or is not eligible to have access to the document eg a restricted resource. An email will be sent to the member who is getting access to the document with the name of the document shared and a link/access the document.
7. Ability to filter by Surfguard officer positions. (At this stage only SLSA Officer Positions that display to States, Branches & Clubs can be used to filter)
8. The Members Area will remember the last view of Category/Organisation/Officer Position when you next visit the library

List View

Revision: 17 — Last modified: 10 December 2020

8.2 – Maintaining Documents in the Library

The Document Library operates a little differently to the News & Events area. There is not the ability for members to 'submit' content for approval. To upload to the Document Library at any level of the

organisation you must be in an Officer position in Surfguard for the specific level of the organisation.

Assigning "Approve Members Area Library Content " Function in Surfguard

Clubs, State & National administrators/officers will be able to approve Library content as long as they are in an Officer position in Surfguard and have been assigned Approve Members Area Library content

Note: If a member is in multiple officer positions in Surfguard they only need to update one officer position with admin

Uploading Content to the Document Library

1. From the Library drop-down select Maintain Documents

2. Click the red **Upload file** button at top right.

3. Upload the document and complete all other fields; Title, Summary, Organisation, Restricted Resources (Optional) and Categories.

4. Click Save

5. The document will now be displayed in the Document Library to the organisation it was uploaded to.

Upload document   ✕

Upload Maximum filesize: 500 MB.

| Browse... | No file selected. |

Title

Summary

Organisation

Restricted resource   ☐

Categories

Save   Cancel

9. History

The History tab enables members to view the following:-

Their Membership History

Membership History

Below is a summary of your previous season history in all clubs that you have belonged to.

State	Branch	Organistion	Date Joined	Category	Status	Season	Registration Date	Competitor	Date Updated
Surf Life Saving NSW	Sydney Branch	Clovelly	03/05/2010	Award Member	Active	2017/2018	12/07/2017	Yes	12/06/2018 12:00:58
Surf Life Saving NSW	Test NSW Branch	Test NSW Club	17/06/2013	Active (18yrs and over)	Active	2017/2018	29/11/2017	No	09/06/2018 08:08:59

Their Transaction History

Transaction History
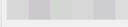
Below is a summary of your previous payment transactions that have been processed. When you pay any monies to Surf lifesaving clubs the transaction are displayed here.

Transaction ID	Transaction Date	Receipt No	Transaction Type	Payment Method	Total Amount	Amount Paid	Outstanding	Description
545423	28/06/2018	2205110676	Membership fee	Credit Card	1.00	1.00	0.00	███████ ████████. Transaction Number: 2205110676. Payer Name:████████
542555	14/05/2018		Membership fee	Credit Card	50.00	50.00	0.00	Eskimos Payment - ████████. Transaction Number: 2174318813. Payer Name:████████

Their Requests History

Request History

Below is a summary of your previous requests that have been processed. When you perform an action such as renewing your membership, updating your personal details, or applying for new membership, your request is sent to the relevant organisation, pending their approval. While these requests are still pending, they will appear on the Pending Requests screen. Once processed, you will see them here.

Club	Type	Created Date	Created By	Processed Date	Processed By	Comments	Status
Clovelly	Update Personal Details	29/06/2018		29/06/2018	Online Renewals	View Comments	Rejected

Revision: 5 — Last modified: 26 May 2019

10. Forms

The following Forms are currently available to be submitted by a Member or by a Club Officer on behalf of a member in the Members Area

1. National Medal
2. National Patrol Service Award Application
3. SLSA Long Service Award Application
4. TAF Re-Endorsement

The next page, 10.1 is broken into two sections:-

1. How a member submits their own Form

2. How a club officer submits a Form on behalf of a member.

Revision: 4 — Last modified: 11 June 2019

10.1 – Submitting a Form for a Recognition Award

Member Submitting Form

> ✳ Scroll down to see how a Club, Branch or State officer/administrator can submit a form on behalf of their members.

Members can submit via their Members Area account a request for a recognition Award.

1. Click the drop-down on the Forms tab

2. Select Add Submission

3. Click the drop-down under Select a form and click the Form you want to submit.

4. Select a club

5. Click Add Submission

6. Select the National Patrol Service Award from the drop-down.

7. Check you have the correct number of seasons listed
8. You can add missing hours from other organisations for the season listed
9. Upload supporting documentation as proof of hours patrolled prior to 2005.
10. Select Save, Submit or Cancel. You can Save the Form and add additional information later.

Club Officer Submitting Form on Behalf of Member

Clubs, State & National administrators/officers will be able to approve Forms as long as they are in an Officer position in Surfguard and have been assigned Form Approver.
Note: If a member is in multiple officer positions in Surfguard they only need to update one officer position with admin functions.

To access Officer Positions in Surfguard go to Organisational Management > Officer > Officers

From the Forms drop down select Add Submission

At the next screen

1. From the Submit form drop down select **On Behalf of a Member in…………**

2. From the Member drop down collect the name of the member you want to submit the form for

3. From the Select A Form drop down chose the Form

4 Click **Add Submission**

The next screen will confirm the name of the Award you are submitting and the name of the member you are submitting the form on behalf of. Select the appropriate Years of Service from the drop down. Scroll back up to Point 7 in Section 1 – Member Submitting Form

Branch or State Submitting Form on Behalf of Member

If a Branch or State Officer wishes to create and submit a form in the Members Area – Forms section the following is displayed.

Branch level – shows all the clubs in the Branch

State level – shows all the clubs in the State

View Submission screen

Indicates the name of the person who submitted the form on behalf of the member and the organisation they are from .

Submission Approval screen

Indicates the Name & Organisation of the approver

10.2 – Approve/Reject Forms

NOTE: Before you can Approve Forms in the Members Area you need to confirm you have been assigned Form Approver Admin Functions in Surfguard.

Approval Process

For forms submitted at a Club Level
The Form is approved by the club and will go to State for approval.

For forms submitted at a Branch Level
The Form is approved by Branch and will go to State for approval

For forms submitted at a State Level
a) If Award is also processed by State the Form still needs to be approved by State
b) If Award is processed by National the Form is approved by State and will go to National for approval

Approving Forms in the Members Area

1. Login to your Members Area account" https://members.sls.com.au
2. From the Forms drop-down click View Submissions
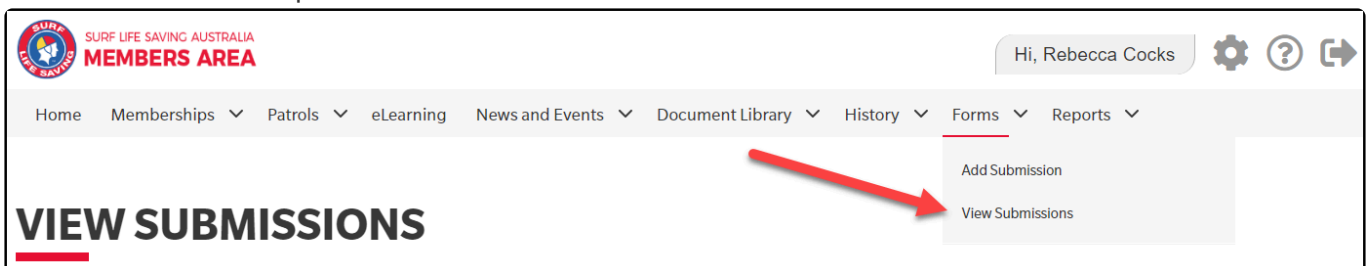
3. Approvers can then filter by: – Organisation, First or Last Name, Form Type, Status, Only My Submissions or Submissions that require my approval.

4. To view the details of a Form you want to Approve/Reject click the red icon to the right of the form and all details of the submitted form will display on the screen

VIEW SUBMISSIONS

Form

| All | ⌄ |

Status

| All | ⌄ | Reset |

☐ **Only my submissions**   ☑ **Require my approval**

4

Form	Status	Organisation	Submitter	Last updated	
National Patrol Service Award Application	Waiting on club *Clovelly SLSC*	Clovelly SLSC	Manfred Freinkel	20 April 2019 10:22am	👁

VIEW SUBMISSIONS

Form

| All | ⌄ |

Status

| All | ⌄ | Reset |

☐ **Only my submissions**   ☑ **Require my approval**

Form	Status	Organisation	Submitter	Last updated

VIEW SUBMISSION - NATIONAL PATROL SERVICE AWARD APPLICATION

Submission Details

Form
National Patrol Service Award Application

Organisation
Clovelly SLSC

Submitter
Manfred Freinkel

Status
Waiting on club – Clovelly SLSC

Created at
20 April 2019 10:22am

Last updated
20 April 2019 10:22am

Submission | Approval

National Patrol Service Award

Please select which National Patrol Service Award this application is for:

10 Year National Patrol Service Award	⌄

Verified Memberships

A Bronze Medallion was acheived on 22/11/2009 during the 2009/2010 season. SLSA has a record of the following memberships since then:

Club	Season	Patrol Hours
Clovelly	2009/2010	27.75 hours
Clovelly	2010/2011	51.75 hours
Clovelly	2011/2012	48.00 hours
Clovelly	2012/2013	48.25 hours
Clovelly	2013/2014	48.25 hours
Clovelly	2014/2015	46.25 hours
Clovelly	2015/2016	17.00 hours
Clovelly	2016/2017	35.00 hours
Clovelly	2017/2018	32.25 hours
Clovelly	2018/2019	41.00 hours

Verified unique seasons: 10

Verified total patrol hours: 395.5 hours

Supporting Documentation

5. To approve the Form, click **Approval**. You will have the option to either Approve or Reject. If you click Approve you will have to type a Comment into the comment box and then click Approve at bottom left.

VIEW SUBMISSION - NATIONAL PATROL SERVICE AWARD APPLICATION

Submission Details

Form
National Patrol Service Award Application

Organisation
Clovelly SLSC

Submitter

Status
Waiting on club - Clovelly SLSC

Created at
20 April 2019 10:22am

Last updated
20 April 2019 10:22am

Submission | Approval

5

Submission Approval

1	**Clovelly SLSC** Waiting on approval	Approve Reject
2	Surf Life Saving New South Wales	
3	Surf Life Saving Australia	
4	Waiting on club	

Organisation
Clovelly SLSC

Submitter

Status
Waiting on club - Clov

Created at
20 April 2019 10:22ar

Last updated
20 April 2019 10:22ar

Submission | Ap

Approve submission ✕

Comment

Member is eligible

Approve   Cancel

6. Once you have approved the Form at a club level it will show the following status.

National Patrol Service Award Application

Organisation
Clovelly SLSC

Submitter
Manfred Freinkel

Status
Waiting on state - Surf Life Saving New South Wales

Created at
20 April 2019 10:22am

Last updated
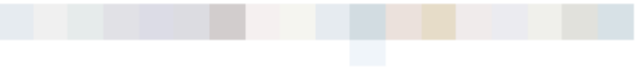20 April 2019 12:29pm

Submission | Approval

Submission Approval

1   **Clovelly SLSC**
        Approved By Rebecca Cocks at 20 April 2019 12:29pm

Member is eligible

2   **Surf Life Saving New South Wales**
        Waiting on approval
                                    Approve   Reject

3   **Surf Life Saving Australia**

4   **Waiting on state**

7. Once all stages are approved it will show that the Award has been successfully awarded.

8. Throughout the form process, form approvers for the relevant organisation level will receive an email advising them of action tasks.

10.3 – Email Notifications

Email Notifications

Individual Submission – member submits their own Form

No email to member advising submission

Email sent to individual when the Form is Approved or Rejected

Club, Branch or Sate Submits Form on behalf of Member (all Forms except TAF Re-Endorsement)

No email sent to member advising Form submission

No email sent to member when the Form is Approved or Rejected

Club, Branch or Sate Submits TAF Re-endorsement Form on behalf of Member

Email sent to member advising Form submission

Email sent to member when the Form is Approved or Rejected

11. Reports

Active Kids (NSW Only)

Club Officers/Administrators, who are in specific Officer positions in Surfguard, can now run a report in their Members Area account to view who has paid using an Active Kids voucher.

1 – Setup Active Kids Officer Positions in Surfguard

There are three (3) Active Kids Voucher Officer positions in Surfguard.
If you are not sure how to create or edit Officer positions in Surfguard Click Here

2 – Members Area – Reports

Revision: 9 — Last modified: 28 May 2020