



# Surfguard

1 — Last update: 1 December 2023

Surf Life Saving Australia

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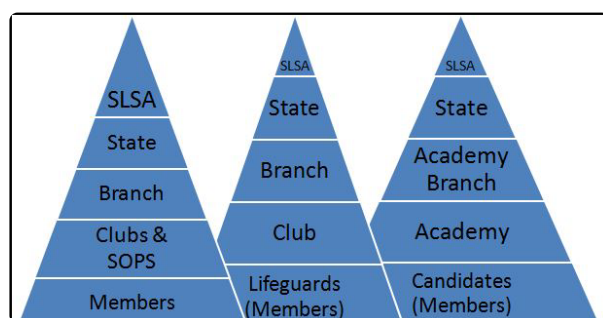
# Introduction

Surfguard is a web-based application and is part of a suite of applications that enables Members, Clubs, Branches, State Offices and Surf Life Saving Australia to access the national membership database



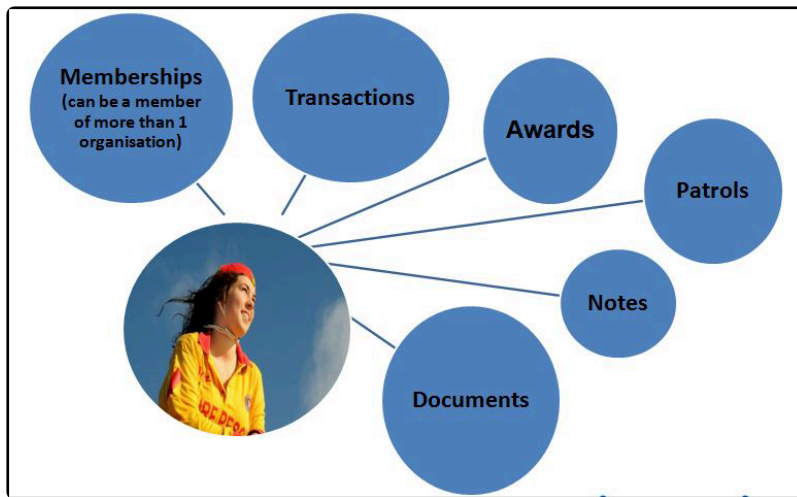
*Surfguard's relationship to other SLSA websites & online resources*

The Surfguard database security is set up on a Child (Club), Parent (Branch) and Grandparent (State) and Great Grandparent (SLSA) pyramid structure. People who have access at a higher level can see the data below them in the structure. Clubs consist of Surf Life Saving Clubs as well as Services such as RWC operations and Lifeguard Services. Where a State has no Branches, all Clubs are entered in the 'Misc Branches' for that State. Those with Club access can only see their own Club data and the membership details of their Club.



*Pyramid structure: Clubs & Support Ops, Lifeguards, Academy*

A person's record is the centre piece of data in Surfguard around which all records are based. A person is a member of an entity (Club or Clubs) which is connected to a Branch/ State etc. Awards, Patrols and other details are attached to the member record and used by many parties in the organisation; therefore, it is vital that all member details are kept up to date.



*Individuals Details in Surfguard*

The Surfguard User Guide is designed as a training resource for those undertaking training in Club, Branch, State or National administration, and a reference tool for those already involved in Club, Branch, State or National administration.

# 1. User Access

If you don't have a Surfguard User account you will need to complete the IT System User Account Application [Form F049](#),

Access to Surfguard is restricted to Club Officers/ Administrators and Branch/ State/ National staff of related SLSA Organisations and Support Operations. When you apply for a user login you can choose from Full Edit Access, Full Read-Only access or access to specific area/s eg Full Edit for Assessments and rest Read Only. Access to the Incident Reporting Database (IRD), Full or Read Only access, can also be requested. Users should be clear about what access is appropriate. Check with your Club Administrator for more information.

Once the Surfguard Helpdesk at SLSA has processed a Form 049, the system will email the user their log in details.

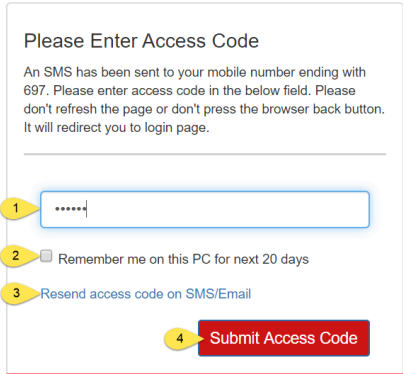
## 1.1 Two Factor Authentication

### Two Factor Authentication

1. When logging into SurfGuard for the first time the following screen will prompt you to enter a code to log in. Enter the code you received via Email/SMS.
2. Select the box 'Remember me on this PC for the next 20 days' to remember your device for 20 days.
3. Select 'Resend access code on SMS/Email' if a new access code is required. Resend Link for 2 Factor Authentication code displays oin 5 seconds
4. Select the red Submit Access code button and you will be directed to the homepage of SurfGuard.

**Note:** For each device you browse SurfGuard on Two-Factor Authentication will be required to access the system.

To update your details for Two-Factor Authentication to work see [Section 1.4](#)



## 1.2 Update Password Every 60 days

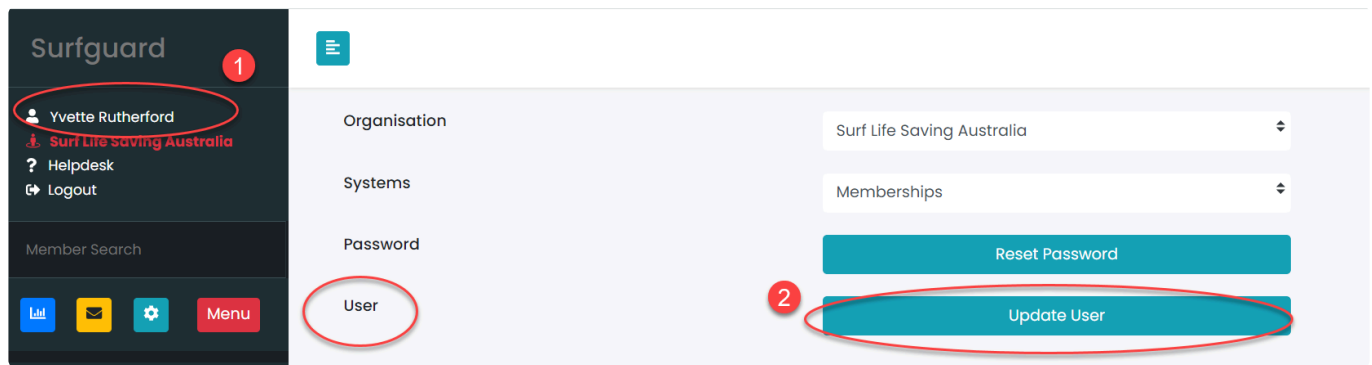
### Update Password Every 60 days

Additional security has been added to Surfguard User accounts to ensure that SLSA meets current security standards.

Surfguard Users now have to update their password every 180 days.

Users should keep their account details up to date. Once you have logged into Surfguard, follow these steps.

1. Click on your name located top left corner of the screen
2. Click on 'Update User'



## 1.3 Logging In

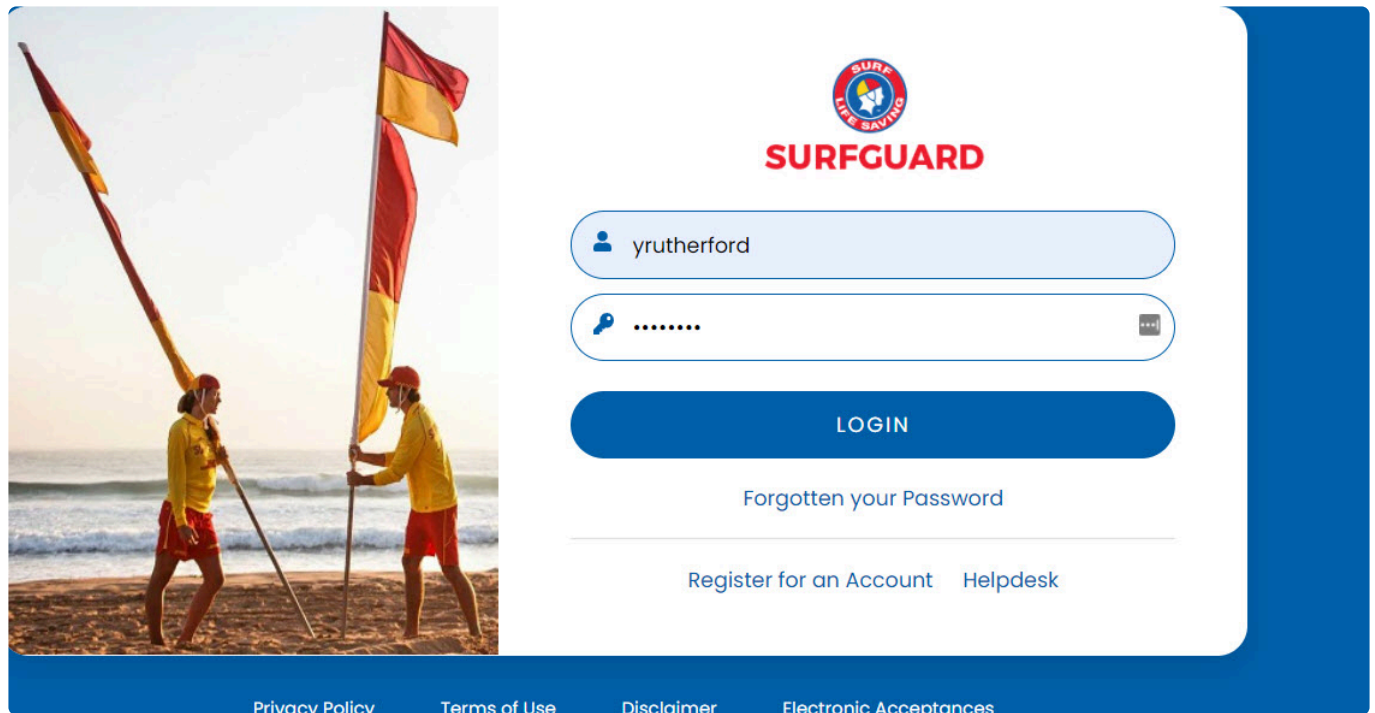
### Login instructions

The Surfguard Entry Point is found by browsing to <https://surfguard.sls.com.au/>

Once you are at the Surfguard Entry Point screen, you will need to enter your Username and Password.

If a user enters incorrect login details 5 times their account will automatically be marked as 'inactive'.

A completed Form 49 is required to reactivate any Surfguard User Account.

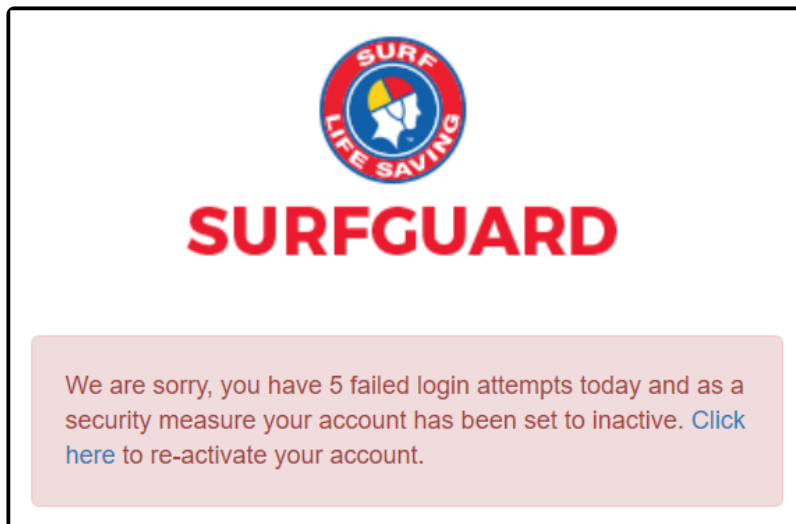
The image shows the Surfguard login page. On the left is a photograph of two surf lifesavers in yellow shirts and red shorts holding red and yellow flags on a beach. On the right is the login form. At the top is the Surf Life Saving Australia logo and the word 'SURFGUARD' in red. Below this is a username field with a person icon and the text 'yrutherford'. Below that is a password field with a key icon, a series of dots, and a 'Show/Hide' icon. A large blue 'LOGIN' button is below the password field. Under the button is a link 'Forgotten your Password'. At the bottom of the form are two links: 'Register for an Account' and 'Helpdesk'. At the very bottom of the page, there is a blue bar with four links: 'Privacy Policy', 'Terms of Use', 'Disclaimer', and 'Electronic Acceptances'.

Upon logging into Surfguard for the first time, a pop-up message will appear indicating any change to the SLSA Usage policy. Surfguard Users will have the option to Agree or Disagree. If a User agrees they will be logged into Surfguard and if they Disagree they will be taken back to the login screen and will not have access to Surfguard until they Agree. The pop-up will only show once for each user who Agrees and will never see the pop-up again until a new message is added.

## 1.4 Locked Out & Inactive Surfguard User Accounts

### Locked Out Users

- If a User logs in incorrectly 5 times in one day their account will be locked.
- If a user locks their account due to 5 incorrect login attempts in one day, but have logged into Surfguard in the last 3 months, they will be able to reactivate their Surfguard User account via email/SMS

The image shows a web page for the SURFGUARD system. At the top left is the Surf Life Saving Australia logo, followed by the word 'SURFGUARD' in large, bold, red capital letters. Below this, there is a 'Password Reset' section. It features a blue header bar with the text 'Password Reset:'. Below the header, there is a light blue box containing the text 'Please enter your registered email account and user name:'. Inside this box, there are two input fields: 'Email: \*' and 'User Name: \*'. Below the input fields, there is a light blue bar containing three buttons: 'Submit', 'Clear', and 'Cancel'.The image shows a web page for the SURFGUARD system. At the top center, the text 'Password Reset' is displayed in blue. Below this, there is a light blue box containing the text 'The reset password link has been sent to the user's registered email address as well as mobile number.' At the bottom center of the page, there is a link labeled '[Login]' in blue.

## Expiring User Accounts

Users who have **NOT** logged in to Surfguard in the last 120 days (All Staes Except VIC) and 270 days (VIC) will be sent an email 15 days prior to the expiry date informing the user they need to log in to Surfguard to keep the account active. If the user does not log in to Surfguard prior to the expiry date their account will be set to Inactive.

## Expired User Accounts

If a Surfguard User account has expired and the User still requiress access they will need to fill out a new [Form 49](#) to be completed, signed off by an authorising officer and submitted to the IT Helpdesk via a [Support Ticket](#)

# 1.5 Surfguard Dashboard

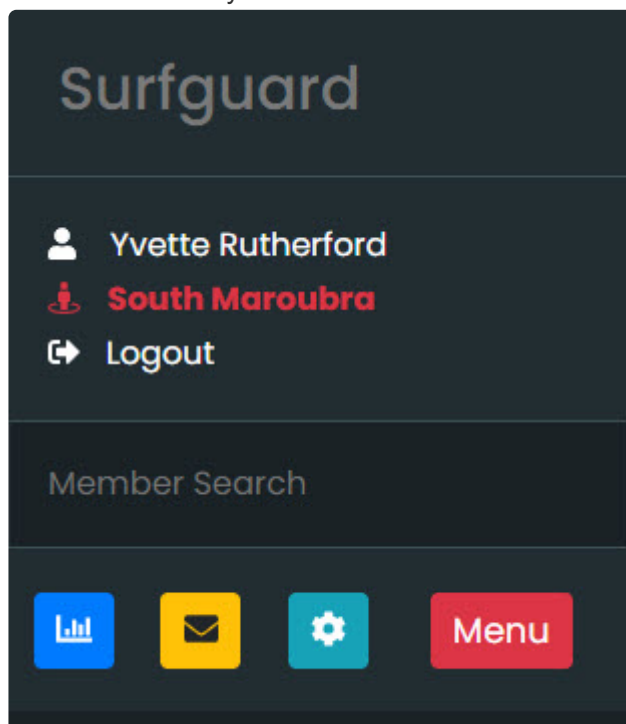
On successful login, you will automatically be taken to the interactive Dashboard showing your organisations:

- Historical Membership Trend By Season
- Current Memberships

- Financial Members
- Member Retention
- Patrolling Members Contribution
- Membership Trent by Month (function to soon be released)
- Gender profile
- Awards & Proficiencies
- TAF & SS Award Holders
- Announcements

The top left of the dashboard will display:

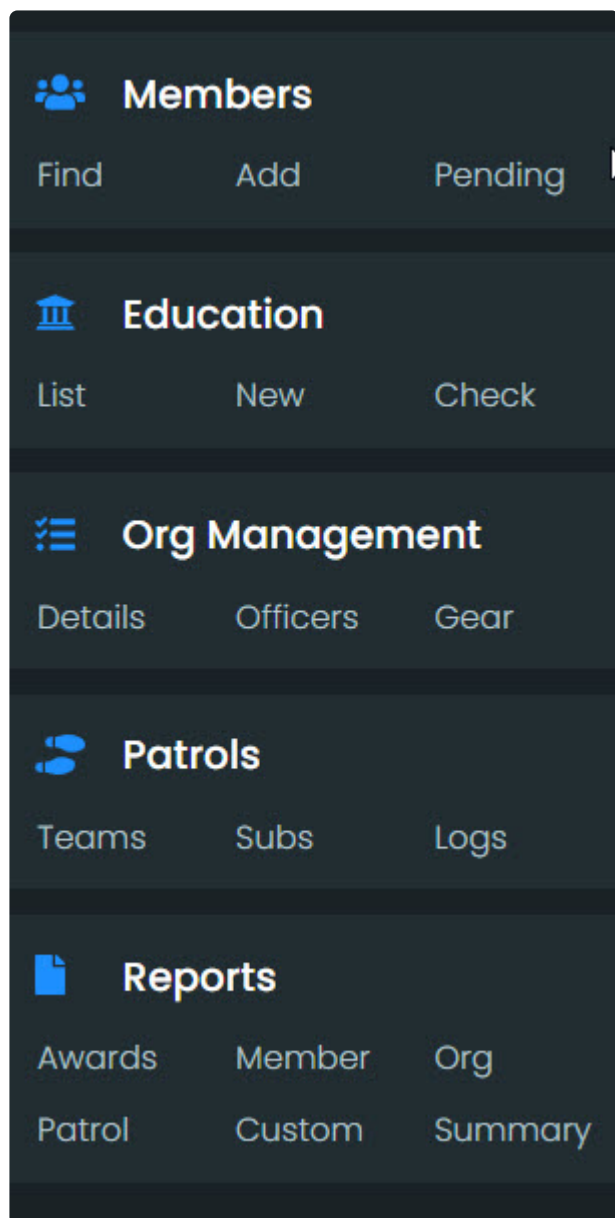
- Your name
- The Organisational level
- Link to Help page
- Log Out
- Member Search
- The **blue** icon takes you to the dashboard
- The **yellow** icon takes you to the Email/SMS Members area
- The **green** icon takes you to view the Maintenance area
- The **Menu** takes you to view all the available menu items



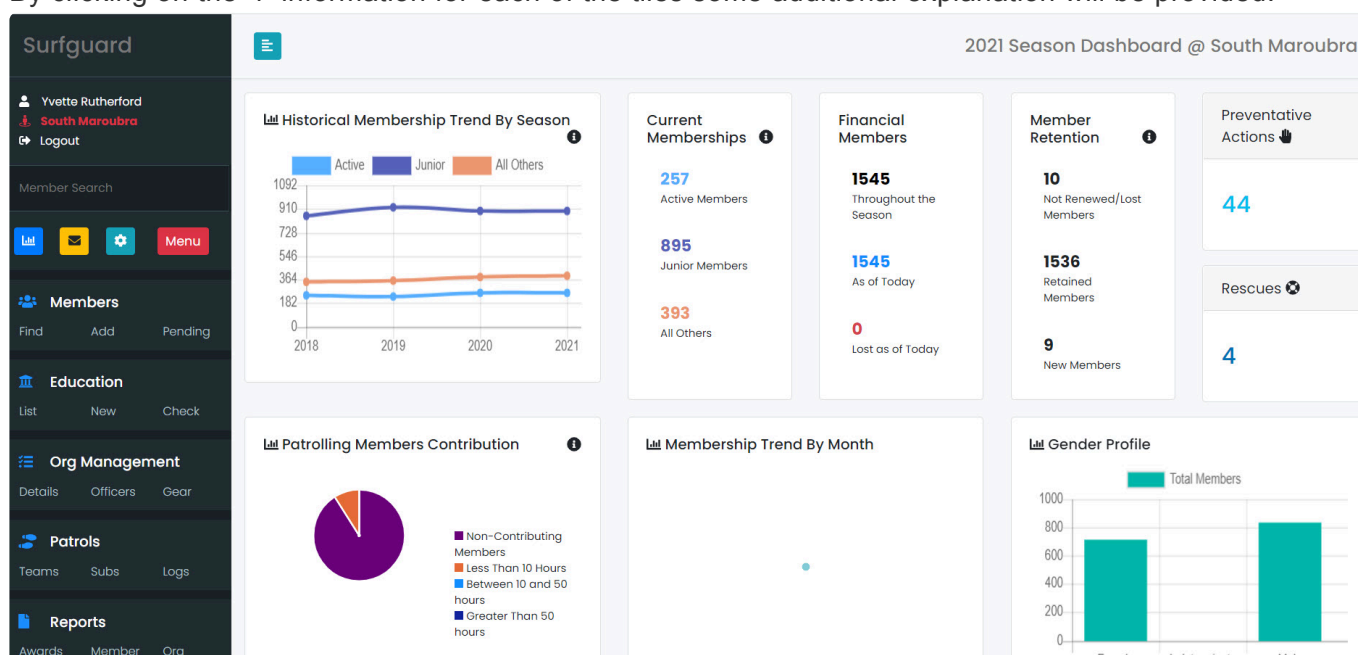
To hide the left hand side menu

Quick links are available on the dashboard to take you to the following areas:





By clicking on the “i” information for each of the tiles some additional explanation will be provided.



## Dashboard:

### Historical Membership Trend by Season

A multi-year trend showing all memberships for the current season and previous 3 seasons. All sub-membership categories have been grouped into 3 sections (Active, Junior and Other) and detailed grouping information can be shown by hovering over the 'i' in the top right corner of the dashboard item. It's important to note that these figures are based on all memberships that have ever been registered for the given season even if the member was active and financial for even a small part of the season.

### Current Memberships

Using the same groupings as the previous graph, a breakdown of currently active financial members

### Financial Members

A high-level look at the number of currently active financial members (as of today) compared to the total number of members who have ever been registered for the current season (throughout the season), lastly showing the difference whereby identifying how many people were previously active members this season however are not now (lost as of today).

### Member Retention

Doing a direct comparison between active financial members for the previous season and the current season, this dashboard item identifies how many of these members were lost and/or didn't renew from the previous season, how many were retained (registered for both seasons) and how many are new (were not registered last season however are registered this season).

### Preventative Actions & Rescues

The total number of preventative actions and rescues this season

### Patrolling Members' Contribution

A breakdown showing the patrol hours that active financial members have attained. Important note, the non-contributing members sector of the graph indicates the number of members in the 'Active' main category (from 1st and 2nd dashboard item groupings) who have not gained any patrol hours during this current season.

### Membership Trend by Month

Showing the number of members who have either joined as a new member or renewed/rejoined or transferred in, results are split up for each month within the current season to identify periods when renewals etc are high/low.

### Awards & Proficiencies

Shows the count of active members for the current season who hold the awards & are proficient in that award. Note for ART they may hold one of the three current ART awards.

- Advanced Resuscitation Techniques (AID)
- Advanced Resuscitation Techniques
- Advanced Resuscitation Techniques Certificate

### TAF & SS Award Holders

This will show the count of active members for the current season who are proficient in the award groups

shown.

### Important Announcements

Communication tool for important updates or scheduled system outages

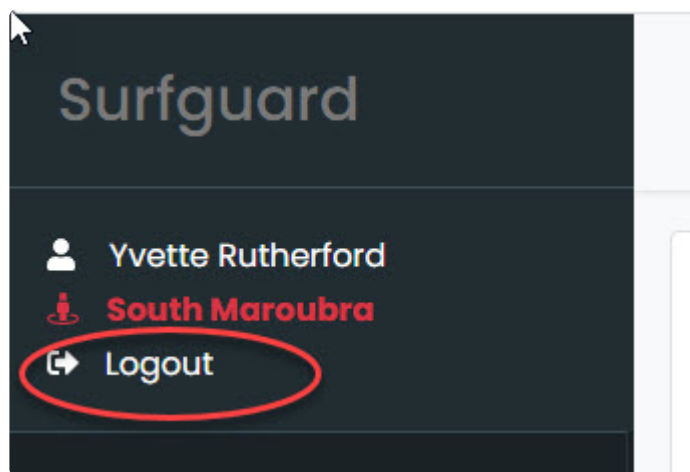
The old dashboard can be viewed Menu > Summary > Dashboard

## 1.6 Logging Out

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### Logout Instructions

To logout of Surfguard click the Logout Link located top left of screen



## 1.7 User Report

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You can obtain a Surfguard Users report from Surfguard. This report will list all those members in your club that have access to Surfguard.

From the 'Reports' quick link section – click on 'Org'

Report Type: Users

Report Output – select PDF

Click on the Advanced Search Button

User Status – highlight 'Active'

Click the Display Report button.

## 2. Summary

### Using Summaries

Some routine administration tasks can be viewed via the Summary function. Depending on your level of access to the database, when you login to Surfguard, click the red 'MENU' tab and locate the 'Summary' section.



### Summary

This section contains nine sub menu categories (club level user).

A description of each summary report is detailed below and these are available from the 'Display' drop down box.

**South Maroubra Summary Details**

Display: Assessment Requests ▼

Season: 2021

☐ Breakdown by Month

☒ Include proficiency assessments

Go

Summary Names	Description
<b>Assessment Requests</b>	Optional: include proficiency assessments and breakdown by month. Gives user a summary of how many Assessments have been approved, archived and incomplete
<b>Award: By Current Membership Location</b>	A list of the SLSA Awards with Male and Female total numbers detailing how many of your members attained an award regardless of which club they were at when they obtained the award (can be filtered by season and with a month by month breakdown)
<b>Awards:</b>	A list of the SLSA Awards with Male and Female total numbers detailing how many of your

<b>Originating FROM this Club</b>	organisations members have attained an award that originated from your organisation. (can be filtered by season and with a month by month breakdown)
<b>Membership Categories</b>	Provides a snap shot of an organisations membership for a specific season detailing membership numbers by membership categories and gender that can be compared to previous seasons
<b>Patrol hours – Organisations</b>	Provides a total number of patrolling hours that your membership has logged against your organisation in a given season
<b>Patrol Hours – Top Members</b>	Provide a report on the Top 10 Female and Male patrolling members who have accumulated the most patrol hours in a specific season. Can be filtered by membership category.
<b>Patrol Stats</b>	A full report of all patrolling stats including # of rescues, beach attendance, first aids performed, patrol weather conditions, preventative actions
<b>Proficiencies</b>	A list of the SLSA Awards with Male and Female total numbers detailing how many of your organisations members have completed a proficiency by season (with breakdown by month optional)
<b>Transfers</b>	This Summary is used to determine the Number of Members who have Transferred in and out of the Club for the desired season.

You can change the summary view by selecting an alternative category from the drop-down 'Display' menu.

You can also look at historical data by changing the year in the 'Season' field.

All fields shown in these lists are clickable links that will take you immediately to a listing of all relevant members.

### South Maroubra Summary Details

Display: Sub-Membership Categories ▼

Season: 2019

Output Format: Single HTML Page ▼

☐ Include non-financial members

Retention Comparison Years: 1

Retention details will only be shown if a number greater than zero is entered.

Go

### Summary – Dashboard

By selecting the Dashboard you will be redirected to your Surfguard Dashboard (home page)

### Summary – Stats

This action will take you to a dashboard that displays a number of statistics.

## Summary – Display Statistics

This section is currently not activated at present.

# 2.1 Assessment Request

The Assessment Requests is sorted based on two assessment types: Awards and Proficiencies.

Data can be viewed based on the season, by month by month breakdown or the status of completion, :

Status of Completion includes:

**Archived** — The Assessment process has been completed and once Archived the Assessment will no longer show in the Assessment Request List.

**Complete** — Shows in Green and the Assessment can now be Archived.

**Incomplete** — Shows in Red and there are still additional steps to be done.

To see the detail of Archived, Complete or Incomplete Assessments, click the appropriate word and this will take you to the Assessment Request screen.

### South Maroubra Summary Details

Display: Assessment Requests Season: 2019 Breakdown by Month

☒ Include proficiency assessments

Go

Assessment Requests	
South Maroubra	248
Archived	245
Complete	2
Incomplete	1

From this screen you can perform a number of actions, including modifying, cancelling or submitting the request, depending on your access level.

## 2.2 Awards (by Current Membership Location)

Awards: by Current Membership Location', provides a list of all new awards and proficiencies held by members of your club.

When viewing the 'Awards: by Current Membership Location' report, by clicking the award type link (e.g.

Bronze Medallion) you can view a list of members' names, the date each member gained their award or proficiency and any relevant expiry date. By clicking the 'Awards' link beside each member displayed, you can view a full list of that member's awards and proficiencies.

Depending on your level of access, further sorting options are available when viewing a list of members with the specified award.

## 2.3 Awards Originating from this Club

**Awards: Originating From This Club** lists new awards that members have gained from your club specifically.

## 2.4 Patrol Hours – Organisations

**Patrol Hours — Organisations** will display the total patrol hours for the given Club or Clubs within a Branch, State for the specific season.



Total Patrol Hours	
South Maroubra	12,474.39

This report at a Branch or State level will show total patrol hours for each organisation listed within their organisation hierarchy.

User can select the option to include visitor hours.

## 2.5 Patrol Hours – Top Members

**Patrol Hours — Top Members** will display the top ten (option to list top 5) male and female active members based on the total to date of their patrol hours for a given season.

A number of filtering options are available including season, including non-financial members and organisation hour type.

### South Maroubra Summary Details

Display:	Patrol Hours - Top Members ▼	Season:	2019
<input type="checkbox"/> Include non-financial members			
Sub-Membership Category:	All ▼		
Leading number of patrolling members:	10 ▼		
Organisation Hours Type:	Lifesaving Hours ▼		
Patrol Hours Specifically For Organisation:	<input checked="" type="checkbox"/> (Otherwise, Patrol Hours Cumulative Across All Organisations)		
<input type="button" value="Go"/>			

Total Patrol Hours	
South Maroubra	7,423.88

## 2.6 Patrol Stats

A Clubs Patrol Stats can be displayed with the option to display Patrolled and/or Unpatrolled Stats or all stats.

Select the 'Stats Type', the season and click GO

### South Maroubra Summary Details

Display:	Patrol Stats ▼	Season:	2019
Stats Type:	<div>All All Patrolled Stats Unpatrolled Stats</div>	<input type="button" value="Go"/>	

## 2.7 Proficiencies

The Proficiencies Summary screen shows the proficiencies gained during a given season.

In addition to only re-qualifications, you may also select the check-box to display proficiency awards gained for the first time.



### South Maroubra Summary Details

Display:

Proficiencies ▼

Season:

2019

☐ Breakdown by Month

☐ Include new awards

Go

## 2.8 Sub Membership Categories

The Sub-Membership Categories Summary is a list of all the club's registered members based on their sub-membership category.

Sub-Membership categories follow the SLSA Regulations and Policies, which can be found in the Member's Portal.

The following Sub-Membership Categories are used:

- Probationary
- Junior Activity Member (5-13 years)
- Cadet Member (13-15 years)
- Active (15-18 yrs)
- Active (18 yrs and over)
- Award Member
- Reserve Active
- Long Service
- Past Active
- Associate
- Life Member
- General
- Honorary
- Non Member Participant
- Leave/Restricted
- Community Member

Filtering option include:

Output format

Include non-financial members

Season

Retention comparison years

### South Maroubra Summary Details

 Display: Sub-Membership Categories

 Season: 2022

 Output Format: Single HTML Page
☐ Include non-financial members

 Retention Comparison Years: 1

Retention details will only be shown if a number greater than zero is entered.

Go

#### Sub-Membership Categories

The figures in this summary are those at 1st July of the selected season (or earlier if elected in the screen 'Registration Season End Settings').

Sub-Membership Category	Total Members	Male Members	Female Members	Indeterminate Gender	Unknown Gender	2021 Season Total Members	Member Retention (%)
Junior Activity Member (5-13 years)	1048	542	506	0	0	1036	101.16 %
Cadet Member (13-15 years)	102	45	57	0	0	120	85 %
Active (15-18 yrs)	122	61	61	0	0	74	164.86 %
Active (18yrs and over)	184	130	54	0	0	186	98.92 %
Reserve Active	12	11	1	0	0	13	92.31 %
Long Service	45	40	5	0	0	46	97.83 %
Associate	22	14	8	0	0	29	75.86 %
Life Member	22	19	3	0	0	21	104.76 %
General	434	205	229	0	0	372	116.67 %
Honorary	9	9	0	0	0	12	75 %
<b>Total</b>	<b>2000</b>	<b>1076</b>	<b>924</b>	<b>0</b>	<b>0</b>	<b>1909</b>	<b>104.77 %</b>

## 2.9 Transfers

The Transfer Summary screen shows the number of members transferring in or out of your club, branch or state during the specified season.

The summary will default to the current season and users have the option to break down the report into Months.

South Maroubra Summary Details

Display: Transfers Season: 2022 ☐ Breakdown by Month

Go

	Transfers				
	Total Members	Male Members	Female Members	Indeterminate Gender	Unknown Gender
Total	224	122	102	0	0
Incoming	110	57	53	0	0
Outgoing	114	65	49	0	0

## 3. Members

---

The 'Members' tab allows you to access member information and process membership changes. The Members tab has eleven sub-tabs.

### Members

Find Member

Add Member

List Members

Manage Family Groups

Create Family Group

Bulk Processing

Pending Member Requests

Transfers

New Transfer In

New Transfer Out

Member Contact Details

### 3.1 Find Member

---

To find a member select the 'Find' in the Member Quick link section (LHS)

The screenshot shows the 'Find Member' page in the Surfguard system. On the left is a dark sidebar with the 'Surfguard' logo, user information for Yvette Rutherford (Surf Life Saving Australia), a 'Logout' button, a 'Member Search' section with icons for analytics, email, settings, and a 'Menu' button, and sections for 'Members' (Find, Add, Pending) and 'Education'. The main content area is titled 'Find Member' and contains several search filters: 'Select state', 'Select branch', 'Select Organisation', 'Member ID', 'First Name', 'Last Name' (highlighted with a blue border), 'Mobile', and 'Email'. To the right of these are checkboxes for 'Include active records' and 'Include archived records', both checked. A red 'More Filters' button is also present. At the bottom are 'Submit' and 'Reset' buttons.

# Surfguard

Yvette Rutherford  
 **Surf Life Saving Australia**  
 Logout

Member Search

**Menu**

**Members**  
Find Add Pending

**Education**

## Find Member

Select state ▼

Select branch ▼

Select Organisation ▼

Member ID

First Name

Last Name

Mobile

Email

Include active records ☒

Include archived records ☒

More Filters

Submit

Reset

Use the filter boxes to input some of the members details such as Member ID, First or Last Name, email, mobile and click the 'Submit' button. Data can be further filtered by clicking on the 'More Filters'. More Filter search options allow you to include suspended and/or deceased records, as well as enabling you to search on part of a name or return only members with Awards, Patrol hours, etc. Making the search as specific as possible will speed it up.



## Find Member

Select state	Include active records
Select branch	Include archived records
Select Organisation	Include suspended records
Member ID	Include deceased records
First Name	Include expelled records
Last Name	Only members with awards
Mobile	Only members with patrol data
Home Phone	Only members with pending member requests
Email	Only members with notes
Date of Birth - From	Only members with documents
Date of Birth - To	Check this to search on part of name
Competitor	Return single row for multi-memberships
All	Records Per Page <input type="text" value="20"/>

Note: For National, State and Branch users, mandatory input of at least 2 characters of the first name/ surname or 5 digits of the member ID is required when searching for active or archived members.

## 3.1.1 Duplicate Member Records

When you come across a Member with duplicate Membership files, to initiate a Surfguard 'merge' of their duplicate files ensure the following information is identical in both Membership ID's

- First Name
- Last Name
- Gender
- Date of Birth (DOB changes are made via your State Office)

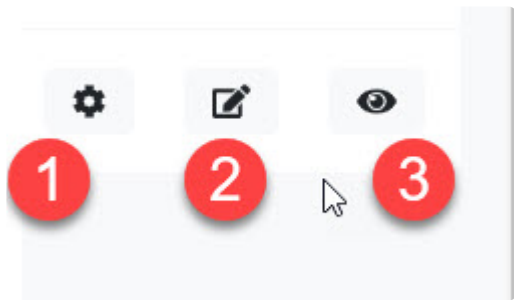
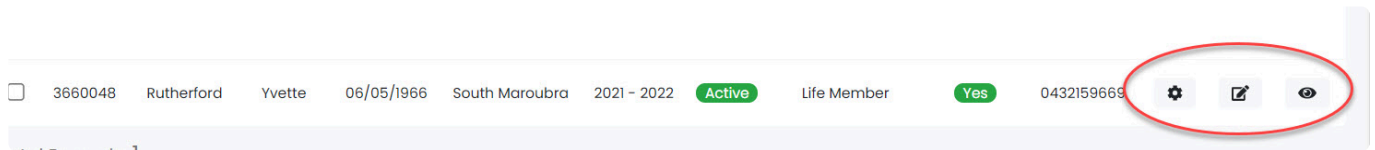
Once the information in Surfguard for both Member ID's is identical, Archive the Member ID you don't want and leave the preferred ID as Active.

A script in the system will run overnight and look for any duplicate accounts with the same first name, last name and DOB and merge the accounts.

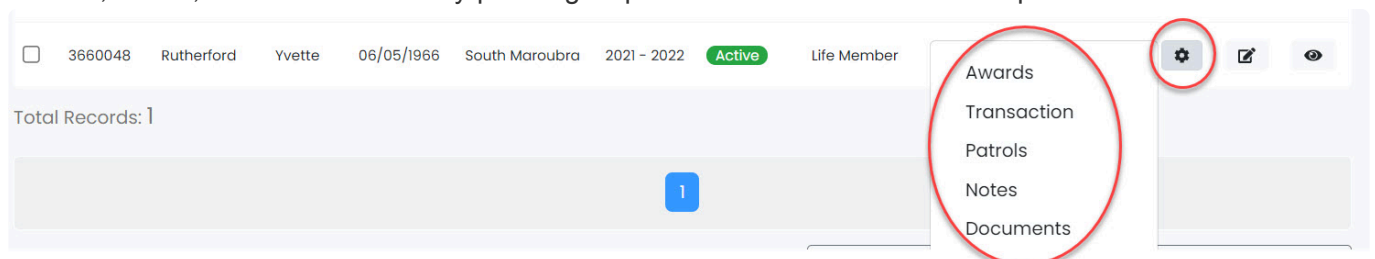
If the duplicate member records do not merge overnight please browse to <https://help.sls.com.au> and log a Support Ticket

## 3.1.2 Find Member – View

Once a member has been found there are a number of action icons that will allow you to view/edit various information attached to a members profile such as personal information, awards, patrols, transactions, notes and documents.



1. Click on the settings icon and this will provide a link to access a members Awards, Transactions, Patrols, Notes, Documents and any pending requests attached to a members profile.



2. Clicking on the 'edit' icon will allow the members file to be edited

3. Clicking on the 'view' icon will display the members file.

### Membership Files and Editing

Membership files contain the following sections:

General Details

Home and Postal Address

Phone number and Email addresses

Clothing Sizes and other details

Membership Details

Guardian Information

Declaration and Member Verification

Member Protection – Working With Children

Medical Details

Emergency Contact Details

Enrolment/Background details

Internal Membership/Mailing Groups

Member Links

Member Area (Portal) Details

Only the fields highlight by a red asterisk are compulsory fields.

## 3.1.3 Find Member – Edit

---



Click on the 'edit' icon to open a member file to edit.

Once changes have been made click 'submit'

### 3.1.3.1 General Details

---

General Details section of a members file includes:

Name

Gender

DOB

Occupation

Address (both physical and mail)

Phone and Email

Note: Post Nominal is for members with an OAM, AM etc

### 3.1.3.2 Address, Phone, Email Details

---

Address fields that contain an asterisk are compulsory fields. Note: flat number and street numbers are collected in separate fields. Once address information has been entered into the Home Address section, you can tick the checkbox, 'same as home address', to pre-fill the same information into the Postal Address



**Home Address (Building Name & Street Name)**

Building Name :

Flat Or Unit Details:

Street Number :

Street Name : \*

Suburb: \*

State: \*  Postcode: \*

Country: \*

Returned Mail: ☐

**Postal Address**

☐ Same as home address

Building Name:

Flat Or Unit Details:

Street Number :

Street Name: \*\*

Delivery Postal Box : \*\*

Suburb: \*

State: \*  Postcode: \*

Country: \*

Returned Mail: ☐

section.

Note: When using the communications module in Surfguard, only Email addresses placed in 'Email Address 1' field are used

Phone Numbers	
Home:	H/Fax:
Business: 92158096	B/Fax: 92158180
Alternate: 0432159669	Mobile: 0432159669
Preferred No:	Mobile Phone

Email Addresses	
Email Address 1:	<a href="mailto:yrutherford@slsa.asn.au">yrutherford@slsa.asn.au</a>
Email Address 2:	<a href="mailto:admin@southmaroubraslsc.com.au">admin@southmaroubraslsc.com.au</a>

### 3.1.3.3 Clothing Sizes and other details

Members can add their clothing sizes to their membership profile. Information captured:

Lycra Vest Size

Shirt Size

Short Size

Swimsuit Size

Clothing Sizes	
Lycra Vest Size:	XL ▼
Shirt Size:	14 ▼
Short Size:	F14 ▼
Swimsuit Size:	W 14 ▼

## 3.1.3.4 Membership Details


### South Maroubra Membership Details

---

Membership Category:

Sub-Membership Category:

**Suggested Sub-Membership Categories:** [expand](#)

Date Joined: \*   (dd/mm/yyyy)

Membership Status:

Registered for Season:

Register for Season:

Competitive rights: (x)Yes ( )No

Please contact your state to change Competitive Rights.

Patrol Hour Exemption:

Locker No:

Club Keys:

### Membership & Sub-Membership Categories

The five Primary Membership categories therefore are:

- **Junior membership** (incorporating sub-categories of Junior Activities membership, Cadet [13-15] membership),
- **Active membership** (incorporating sub-categories of Active membership, Reserve Active membership, Award membership),
- **Community membership**
- **Associate membership** (incorporating sub-categories of Associate membership, Probationary membership, General membership or Leave/Restricted membership),
- **Honorary and Service membership(s)** including Life Membership (incorporating sub-categories of Long Service Membership, Honorary membership, Past Active membership).

### Membership Status

There are 4 options

1. Active
2. Archived
3. Deceased
4. Suspended

### Registered Season

By clicking on the 'current' button the correct season will be shown ie: 2021/22

2021 - 2022 (current season)

Previous

Current

Next

There are three options in Patrol Hours Exemption.

1. No Exemption – is the default display
2. Minimum patrol hours required – Available to Club/Branch/State/National users
3. No patrol hours required – Available to Branch/State/National users

## 3.1.3.5 Guardian, Declaration and Member Verification

### Guardian Information

The system captures an under 18 year members guardian first and last name.

### Declaration Information

This section can only be populated/edit by club admin or is automatically updated when a members online renewal or join application is processed via the pending requests section of surfguard. If a member has completed a hard copy of the Annual Membership Form, club admins need to update this section. All paper Membership Forms needs to be sorted at the surf club, under lock and key, for a period of 5 years.

Declaration Information

Guardian First Name:   
Guardian Last Name:   
Signed Membership Declaration: ☐  
Signed Liability Declaration: ☐  
Signed Guardian Declaration: ☐  
Signed Date:  (dd/mm/yyyy)

### Member Verification

This section can only be completed by club admin and not the member

If you have verified a members DOB, this is the section to record that information.

### Member Verification

You should fill out all fields for the ID type selected

Member Verification ID Sighted:	<input type="checkbox"/>
Member Verification ID Sighted Date:	<input type="text"/>  (dd/mm/yyyy)
Member Verification ID Type:	<input type="text"/> ▼
Member Verification ID Number:	<input type="text"/>

### Guardian Information

When a new member is Joining and it is detected that they are under the age of 18yrs the collection of their Parent/Guardian First Name, Last Name, Mobile and Email is required (all fields mandatory)  
Additionally when an email/SMS communication is sent to members under 18yrs, via Surfguard, the communication is also sent to the Parent/Guardian

### Guardian Information

First Name:	<input type="text"/>
Last Name:	<input type="text"/>
Mobile Phone:	<input type="text"/>
Email Address:	<input type="text"/>
Do not Send SMS:	<input type="checkbox"/>
Do not Send Email:	<input type="checkbox"/>

## 3.1.3.6 Member Protection – Working With Children

### Member Protection

As each State Law requirements are different for Working With Children (Child protection), this section contains a number of fields to cover all state requirements.

Some States require each member to complete a Member Protection Declaration Form along with having a working with children check.

Please refer to your Surf Life Saving State SOP for further information on member protection.

Note: Member Protection Form is different to Work With Children Check.



### Member Protection

Member Protection Declaration Form: [ ] Completed

Member Protection Declaration Date:

Member Protection Declaration Expiry Date:

Working with Children Registration / Verification Date:

Working with Children Registration Expiry Date:

Working with Children Registration No:

Member Protection Note:

Screening Withdrawn Date:

Screening Suitability Notice Date:

Screening Type:

National Police Check Application No:

National Police Check Expiry Date:

## 3.1.3.7 Medical and Emergency Details

Members can register a number of details within the Medical Details section, including Covid vaccination status.

### Medical Details

Registered Asthmatic: ☐ Yes ☒ No

Organ Donor: ☐ Yes ☒ No

Blood Type:

Medical Notes:

Hepatitis B Vaccination: ☐ Yes ☒ No

Injured/Light Duties: ☐

Covid Vaccination:

Vaccination Notes:

Proof of Vaccination Sighted: ☐

### Injured/Light Duties

This checkbox should be ticked if a member has been injured or assigned Light Duties due to injury.

By ticking this checkbox, members will not be eligible for entry into SEMS or Patrol Duties.

This function is only available to club admin and not the member.

### Covid Vaccination

There are 5 Covid vaccination statuses that can be selected from the drop-down.

- Not Vaccinated
- Partially Vaccinated
- Fully Vaccinated
- Fully Vaccinated + Booster
- Not Vaccinated with Exemption

Additional Vaccination Notes can also be added and once sighted the Proof of Vaccination box can be ticked

**NOTE:** Members can also update their Convida Vaccination status & add Vaccination Notes via their Members Area Account > Update Personal Details > Medical Details.

There is a checkbox for 'Proof of Vaccination Sighted'

Reporting: The above fields can be reported in a Custom Report > Medical Fields.

### Emergency Details

A number of fields are compulsory which are identified by asterisk

The checkbox 'Prefill with member info' pre-fills in address and surname details

Emergency Contact Details			
<input type="checkbox"/> Prefill with member info			
Title:	Unknown ▼		
First Name: *	<input type="text"/>		
Middle Name:	<input type="text"/>		
Last Name: *	<input type="text"/>		
Relationship: *	Unknown ▼		
Emergency Contact Home Address			
Address 1:	<input type="text"/>		
Address 2:	<input type="text"/>		
Suburb:	<input type="text"/>		
State: *	NSW ▼	Postcode: *	<input type="text"/>
Country: *	Australia ▼		
Returned Mail:	<input type="checkbox"/>		
Emergency Contact Numbers			
Home Phone:	<input type="text"/>	Home Fax:	<input type="text"/>
Business Phone:	<input type="text"/>	Business Fax:	<input type="text"/>
Alternate Phone:	<input type="text"/>	Mobile Phone:	<input type="text"/>

## 3.1.3.8 Internal Membership/Mailing Groups, Member Links & Member Area Details

### Internal Membership

Clubs can create their own internal membership groups. This is managed in the 'Organisation Management – Internal Membership' section of Surfguard.

Example of such groups: 2022 State Touring Team, BBQ Team, Nipper Competition Board Squad.

**Internal Memberships @ Test NSW Club**

Internal Membership Category	Display Order	User Options
Gym 2020	1	<a href="#">Edit</a> <a href="#">Delete</a>
Webinar Group	2	<a href="#">Edit</a> <a href="#">Delete</a>
Test Group	3	<a href="#">Edit</a> <a href="#">Delete</a>

[Add New Internal Membership Category](#)

To create an 'Internal Membership Category' go to the 'Organisation Management – Internal Membership' section of Surfguard and click on 'Add New Internal Membership Category'. Type in the name of the group and assign a display order number.

**Add New Internal Membership @ Test NSW Club**

Intl Membership Category: \*

Display Order:

[Save](#) [Clear](#) [Cancel](#)

Members can be assigned to an 'Internal Membership Group' if a club has created such groups.

When viewing/editing a members file a list of 'Internal Membership Groups' will be listed and able to be selected. (Located bottom right of member file)

Internal Membership groups can be used in the Surfguard communication module to contact specific



groups via SMS or Email

## 3.1.4 Find Member – Awards

A members list of awards can be viewed by clicking on the settings icon and selecting Awards from the drop down list.

At the bottom of the awards screen, users can 'print record of results'

## 3.1.5 Find Member – Transactions

To see a members **Transactions** that have been made by the member via the Members Area and also transactions added manually by the club click on the settings icon and select 'Transactions' from the drop down box.

1. Use the date fields 'from – to' to list transactions from previous seasons
2. All Transactions will be listed and these can be viewed, edited or deleted

8

## Transaction Details for Yvette Rutherford

1

From Date: 01/07/2019 To Date: 30/06/2020 Go

2

Transaction Date: \* 10/06/2020

Transaction Type: Carnival entry fee

Payment Method: Cash

Amount: 0

Paid: 0

Outstanding: 0

Receipt No.:

Description:

Add Clear

Date	Type	Amount	Outstanding	ReceiptNo	Actions
28/02/2020	Other	1.00	0.00	2645869021	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
27/02/2020	Function	400.00	0.00	2644357800	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
05/02/2020	Function	70.00	0.00	2627151669	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
02/08/2019	Other	1.00	0.00	2489274167	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>

3. Add a Transaction manually by completing the fields and clicking 'save'.



Transaction Date: \* 10/06/2020

Transaction Type: Membership fee

Payment Method: Cash

Amount: 100

Paid: 100

Outstanding: 0

Receipt No.: 1234

Description: paid in club office

Add Clear

A transaction report can be obtained by clicking Reports – General Reports – Member Reports and then selecting Transactions from the report type drop down box. Select the output format and select a date range or customise your report by clicking on the 'advanced search' button

## 3.1.6 Find Member – Patrols

To view a members Patrol information click on the settings icon and select 'Patrols' from the available

menu.

A Members Patrol section will display the Patrol Roster, detailed Patrol Hours including season competition hours.

**Members @ Surf Life Saving Australia**

**Search Criteria:** First Name begins with yvette; Surname begins with Rutherford; Competitor = All; Status = Active,Archived; Single row for multi-memberships.

<input type="checkbox"/>	Member ID	Surname	First Name	DOB	Organisation	Registered Season	Status	Sub-Membership Category	Competitor	Contact Number	
<input type="checkbox"/>	3660048	Rutherford	Yvette	06/05/1966	Multi-Memberships						<div> <div>1</div> <div>2</div> </div> <ul style="list-style-type: none"> <li>Awards</li> <li>Transaction</li> <li>Patrols</li> <li>Notes</li> <li>Documents</li> </ul>

Total Records: 1

## 3.1.7 Find Member – Notes

**Notes** can be added to a members profile. To view or create notes, find the member and then click on the settings icon and select the option 'Notes'.

<input type="checkbox"/>	Member ID	Surname	First Name	DOB	Organisation	Registered Season	Status	Sub-Membership Category	Competitor	Contact Number	
<input type="checkbox"/>	3660048	Rutherford	Yvette	06/05/1966	South Maroubra	2021 – 2022	Active	Life Member			<div> <div>1</div> <div>2</div> </div> <ul style="list-style-type: none"> <li>Awards</li> <li>Transaction</li> <li>Patrols</li> <li>Notes</li> <li>Documents</li> </ul>

Total Records: 1

Notes are date stamped. Members notes will be viewable by all organisations that a member belongs to however each note can only be edited by the creating entity. Notes can also be accessed from within a member record from the Members Link section.

1. Use the date filter 'from and to' fields to view all members notes

**Notes for Yvette Rutherford @ South Maroubra**

1

Note Dates From: 01/07/2017 To: 10/06/2020

Note Type: All Only Display Current Organisation Notes: No

Go

Create Note 3


Note Date	Organisation	Note Type	Heading	Options
01/06/2019	South Maroubra	Recognition	Clubman of the Year	View Edit Delete

Total: 1 Note(s).

2. All notes attached to the members file will be displayed
3. From this screen you can create a new Notes. Click 'create note' and fill in the Date, Type, Heading and Details sections.

### Notes for Yvette Rutherford @ Surf Life Saving Australia

**Organisation:** Surf Life Saving Australia

**Note Date:**   dd/mm/yyyy


**Note Type:**

**Heading:**

**Details:**

## 3.1.8 Find Member – Documents

Surfguard allows users to upload Documents against a members file. To view or add documents to a members profile – find the member and then click on the settings icon and select 'Documents' from the available drop down menu.

<input type="checkbox"/>	Member ID	Surname	First Name	DOB	Organisation	Registered Season	Status	Sub-Membership Category	Competitor	Contact Number
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All										
<input type="checkbox"/>	3660048	Rutherford	Yvette	06/05/1966	South Maroubra	2021 - 2022	Active	Life Member		
Total Records: 1										
<div> <div>1</div> <div>  <div> Awards Transaction Patrols Notes Documents </div> </div> </div>										

Examples of documents that a club may add to a members profile may include: Members ID, Blue Card, Birth Certificate, Drivers Licence, Marine Licence, RPL Documents.

1. Click on View, Update or Delete to manage uploaded documents.



## Documents for Yvette Rutherford @ South Maroubra

Document Name From: 
To:

Document Type: 
Document Description:

Go

Attach New Document

Document Name	Description	Type	Size	Options
Drivers Licence	Drivers Licence	PDF	37 Kb	View Update Delete
Honour Blazer Nomination	Honour Blazer Nomination (4pg)	PDF	148 Kb	View Update Delete
Life Membership Speech for YR by Nominator LP	Yvette Rutherford	DOC	33 Kb	View Update Delete
Member Protection Declaration	Member Protection Declaration	PDF	337 Kb	View Update Delete
Member Protection Officer Certificate	Member Protection Officer Certificate 2017	PDF	86 Kb	View Update Delete
P1 Old member card	Page 1 Member card	PDF	71 Kb	View Update Delete
P2 Old Member card	Page 2 Member card	PDF	55 Kb	View Update Delete
P3 Old member card	Page 3 Member card	PDF	38 Kb	View Update Delete
WWCC	WWCC	PDF	514 Kb	View Update Delete

**Total: 9 Documents(s).**

2. From this screen you can also attach a new Document. Document size is a maximum of 2Mb  
Click on 'Attach New Document', type in the document name and description and upload image.  
Click 'Save'

## Documents for Yvette Rutherford @ South Maroubra

Attach New Document

**Document Name: \***

**Document Description: \***

**Upload Document: \*** Choose file No file chosen

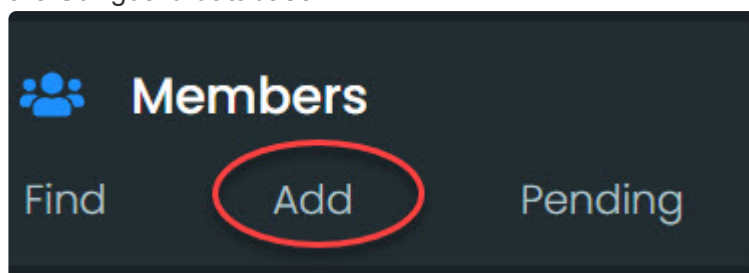
**Please Note:**  
**Acceptable Document Types:** DOC, DOCX, GIF image, JPEG image (jpeg), JPEG image (jpeg), PDF, PNG image, TXT  
**Maximum File Size:** 2M

Save
Cancel

## 3.2 Add Member

To add a member click the 'Add Member' sub-menu. You can then add an individual's details using the drop-down option lists on this screen.

A red asterisk (\*) indicates a field that must be completed for the record to be successfully submitted to the Surfguard database.



Mandatory fields include First Name, Last Name, Gender and Date of Birth, Home & Postal Address fields and Date Joined. These criteria help identify individual sets of data within Surfguard. By clicking the 'Check for Duplicate' button under Date of Birth, you can search the database for similar entries using the four mandatory fields (First and Last Name, Gender and DOB). For example, if two family members with the same name join the same Club, they will be differentiated by their respective dates of birth.

### Top Tips for Add Member

- **Occupation Field** – A member's occupation will automatically default to "Student" if the member is aged up to 16 years old.

- **Preferred Name/ Family name** – use if a member wishes to go by nickname or maiden/ married name.
- **Post nominal** – This is a list of letters displaying after a members name that have been nominated by orders from the government and letters from Professional associations in Australia. eg AO, OAM, QC, JP
- **Returned Mail flag** – A checkbox for each address type (Home, Postal and Emergency Contact) displays. This allows club administrators to flag the address if it is incorrect and mail has been returned to sender. The flag has been added to a number of member details reports giving access to reporting on all members with incorrect addresses.
- **\*Email Address \*** - 2 email addresses can be added, however, email communication sent via Surfguard only sends to Email Address 1.
- **Do not Send SMS/Email** – It is a legal requirement of the Privacy Act that Clubs action requests by members who do not want any information sent to them via Email or SMS. These must be checked for a member who requests either or both options. Once any or all of the boxes are ticked the member will no longer receive any communication from any level of the organisation.
- **Member Protection Fields and Police Check** – please check with your State centre how to complete these fields as each State has different requirements based on the state legislation requirements.
- **Member injured/ Light Duties information** – a person will not be able to have patrol hours entered against their name if the Injured/ Light Duties box has been ticked in the member details area. This is to prevent a person from patrolling if they are under a Workcover/return to work activity.
- **Members Portal Account Details** – will be blank if a member has not created a Member Area account. If there is an account created the details displayed include Username, Created Date & Last Login Date.

#### Medical Details:

This section captures a members medical history including:

- Asthmatic
- Organ Donor
- Blood Group
- Hep C
- Covid Vaccination status



### Medical Details

Registered Asthmatic: ☐ Yes ☒ No

Organ Donor: ☐ Yes ☒ No

Blood Type:

Medical Notes:

Hepatitis B Vaccination: ☐ Yes ☒ No

Vaccination Club & Date:

Injured/Light Duties: ☐

Covid Vaccination:

### Emergency Contact Details

☐ Prefill with member info

Title:

Not Vaccinated

Partially Vaccinated

Fully Vaccinated

## 3.3 List Members

The list members view contains a list of all members in your organisation with an Active Status. From this screen you can view or edit each individual member's record. It should be noted that, where the Club List runs onto a second page, you can access the next screen by clicking the 'Next >>' link. This list can be alphabetically sorted using the letters above the list or by clicking the column header to sort by a specific column. When an individual member record is selected, you can access the member's awards, patrols and transactions data by clicking the setting icon and accessing the member links.

When you are viewing a list of members, you can SMS or email the member/s direct from this screen. To SMS or email member/s from their member record, tick the relevant boxes besides the Member ID, then click SMS Selected Members or Email Selected Members.





## Members @ Test NSW Club

Search Criteria: Status = Active.

<input type="checkbox"/>	Member ID	Surname	First Name	DOB	Organisation	Registered Season	Status	Sub-Membership Category	Competitor	Contact Number			
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All													
<input type="checkbox"/>	5734454	Alterna	Feedaa	25/09/2011	Test NSW Club	2021 - 2022	Active	Junior Activity Member (5-13 years)	Yes				
<input type="checkbox"/>	5545386	Baum	Adam	06/06/2004	Test NSW Club	2021 - 2022	Active	Active (15-18 yrs)	Yes				
<input type="checkbox"/>	5740561	bloggs	jo	05/05/2005	Test NSW Club	2021 - 2022	Active	Active (15-18 yrs)	Yes	0400975283			
<input type="checkbox"/>	5628610	blue	Purple	01/01/1999	Test NSW Club	2021 - 2022	Active	Active (18yrs and over)	Yes	0421875547			

## 3.4 Manage Family Groups

### Key Information

- A Family Group is simply an artificial grouping of people in one club for the purposes of data management where it is assumed the primary member(s) in control of the group have some sort of legal standing to manage the Family Group.
- Family Groups consist of Primary member(s) who can manage the group and standard members who can be managed in the group.
- A Family Group can only exist where there is at least one Primary and one Standard member.
- A Primary member must be over 18 years old and have an email address listed in their Surfguard membership file.
- Notifications will be sent to the primary member of a family group when a person is demoted or removed from a group.
- 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.
- Family groups can be manually created by a surf club or a member can create a family group request via the Members Area or the Join system.  
Member Family Group requests come into Surfguard via the pending request module. Once a family group request has been accepted in the pending request section then the group is added to your Family Group list.

To Manage or view your clubs 'Family Groups' click on the red MENU link. From the members section select 'Manage Family Groups'

**Surfguard**

Yvette Rutherford  
**Test NSW Club**  
 Helpdesk  
 Logout

Member Search

**Menu**

**Members**  
 Find   Transfers   Pending

**Summary**  
 Summary  
 Dashboard  
 Stats  
 Display Statistics

**Members**  
 Find Member  
 Add Member  
 List Members  
**Manage Family Groups**  
 Create Family Group

The 'Manage Family Group' screen will list all the family groups in your clubs SurfGuard database for members within your club.

Use surname or family group names to assist search filtering.

**Family Groups @ Test NSW Club**

Family Group name - From:  To:   
 Family Group Containing Surnames - From:  To:

Family Group Name	Number of Members	Primary Contact	Actions
McTaggart-Clapper	3	Becca McTaggart	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Delete</a> <a href="#">Renew Memberships</a>
Relation	2	Sally Relation	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Delete</a> <a href="#">Renew Memberships</a>
Rutherford Test	7	Purple blue, Yvette Rutherford	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Delete</a> <a href="#">Renew Memberships</a>
Tdtdtdtdtdtdtdtd	4	Trentooo Klicker	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Delete</a> <a href="#">Renew Memberships</a>
TestAge	4	Larry Ladle, Rebecca McTaggart-Cocks	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Delete</a> <a href="#">Renew Memberships</a>
TestField1	3	Coffee Cup, Darren Ruby	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Delete</a> <a href="#">Renew Memberships</a>
Travis Test	4	bongo klersnotgrass, Travis Klerck	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Delete</a> <a href="#">Renew Memberships</a>

See next items within 3.5 to edit, delete or create a new family groups.

## 3.5 Creating a Family Group

Surfguard administrators can create a Family Group by selecting Menu – Members > Family Groups > Create Family Group.

People can be added as a PRIMARY or a Standard member of the Family Group.

Type in the name of the Family Group ie: Smith Family.

A Primary Contact must be added First, these are the members who can manage the other members in the family group (over the age of 18 yrs)

To find and add the first Primary member type in the members name or ID and click on the 'get member' button.

**Note:** You may need to tick the box Include Non-Financial Members.

Once the member has been found click on their name to highlight them and move them across to the 'selected members' box.

If you wish to have more than one primary group member, search for the next member and add them to the 'selected members' box.

To add standard members to the family group, scroll down the screen and use the search filters in this 'standard members' section to find your member and add them to the 'selected members box'

**Create a Family Group @ Test NSW Club**

**Family Group Details**

Family Group Name: \*

**Select Primary Contact**

☒ Include Non Financial Members

Filter Available Members Further: (recommended for organisations with a large amount of members)

Member ID: \*

First Name: Joshua

Last Name: Tester

Date of Birth: \* (dd/mm/yyyy)

Sub-Membership Categories:

- Probationary
- Junior Activity Member (5-13 years)
- Cadet Member (13-15 years)
- Active (15-18 yrs)
- Active (18yrs and over)
- Award Member
- Reserve Active
- Long Service
- Past Active

**Get Members**

**Available Members:**

Testerman, Joshua (DOB: 29/03/1998, Reg Season: 2018, Life Member) - Active

**Selected Members: \***

Testerfield, Joshua (DOB: 29/03/1998, Reg Season: 2018, Probationary) - Active

Once you have found all members from the Available Members section and moved them across to Selected Members, scroll down and click **Create Family Group**

The Primary member will receive an email once the group has been approved in SurfGuard.

### 3.5.1 Deleting a Family Group

Surfguard administrators can delete a family Group by selecting Menu – Members > Family Groups > Manage Family Groups

To delete a family group, select the 'Delete' option next to the desired group. **NOTE:** an email will be sent to the Primary Member advising that their family group has been deleted/dissolved.

**Family Groups @ Test NSW Club**

Family Group name - From:  To:   
 Family Group Contaning Surnames - From:  To:

Family Group Name	Number of Members	Primary Contact	Actions
georgetest	3	peter tester	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Delete</a> <a href="#">Renew Memberships</a>
GPT FG 7065	2	Rebecca Cocks	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Delete</a> <a href="#">Renew Memberships</a>
Sems Family	4	Margaret Sems	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Delete</a> <a href="#">Renew Memberships</a>



## 3.5.3 Editing Family Groups

Surfguard administrators can manage/edit a family Group by selecting the following Members > Family Groups > Manage Family Groups.

**Note:** If you have a large number of family groups, you can simply use the Search facility to find and edit a family group.

**Family Groups @ Test NSW Club**

Family Group name - From: 1  To:   
 Family Group Contaning Surnames - From:  To:   
2

Family Group Name	Number of Members	Primary Contact	Actions
McTaggart	3	Rebecca McTaggart	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Delete</a> <a href="#">Renew Memberships</a>

Members can also edit/change/delete their family groups. They may wish to add or remove a person from their family group. Members do this via the Members Area and submit a Family Group pending request. Once a club has accepted a family group request the system will update their family group accordingly.

### Editing A Family Group

1. To update the name of the Family Group type in the update name details in the 'Family Group Name' field.
2. To remove a member from the family group, click **Remove**.
3. To update a member's individual member profile click **Edit**
4. To add another family member to the group select either **Add new member as primary contact** or **Add new member as a standard member**

Edit Family Group @ Test NSW Club

---

**Family Group Details**

Family Group Name: \* McTaggart

Organization Test NSW Club

---

**Primary Contact Details**

Member ID	Member Name	DOB	Contact Number	Email	Registered Season	Status	Sub-Membership Category	Action
5464537	Rebecca McTaggart	05/10/1966	0413444555	test@mctaggart.com	2019	Active	Active (18yrs and over)	<a href="#">Edit</a>

[Add new member as primary contact](#)

---

**Standard Member Details**

Member ID	Member Name	DOB	Contact Number	Email	Registered Season	Status	Sub-Membership Category	Action
5845999	Donald McTaggart	18/02/1961	0413444555	test@mctaggart.com	2019	Active	Active (18yrs and over)	<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Promote as Primary Contact</a>
5740416	Lola McTaggart	10/10/2010	0413444555	test@mctaggart.com	2018	Active	Probationary	<a href="#">Edit</a> <a href="#">Remove</a>

[Add new member as standard member](#)

[Save](#) [Cancel](#)

## Renewing a Family Group

Options are available next to each family group to 'Renew Memberships'. By selecting this link it will take you to the bulk processing screen and provide the ability to renew the membership for all members of that family. **NOTE:** This action should only be done once you are using paper renewal forms and they have been signed and payment has been made.

## 3.6 Bulk Processing

You can easily process a number of club members at once by using the 'Bulk Processing' sub-menu which is sitting in the 'Member' menu list.

You can use the Bulk Processing function to:-

- Activate Members
- Archive Members
- Clothing Sizes
- Create Member Notes
- Dissolution of Family Groups
- Internal Memberships
- Member Protection
- Register Members for Current or Next Season
- Transactions
- Update Member Declarations

- Update Member Details
- Update Member Source Companies
- Update Sub-Membership Categories

Select the 'Process Type ie: Archive

Depending on the Process Type selected from the drop-down you may be prompted to remove the member from Patrol Teams and Internal Membership groups.

**Also remove Members from:**

☒ Internal Memberships
 ☒ Patrol Teams  
 By removing this members from patrol team you will also remove any patrol substitution requests linked to this members in their specific team.

☒ Mailing Groups

Use the search filters to find specific members or just click the 'search' button to get a list of all your club members.

Highlight members by clicking their name in the Available Members list and clicking the > to move to Selected Members. The quickest way to add names to the Selected Members list is by holding the Control key down and clicking multiple members name in the "Available Members" list and then click > to move them to Selected Members.

You will be prompted before being allowed to process any member records. Click 'OK' to continue or 'Cancel' if you want to review or change your selection.

You can clear all the fields selected and start again by clicking the 'Reset' button at the bottom of the screen.

**Bulk Processing for Test NSW Club**

Process Type:

Archive Members  
Activate Members  
**Archive Members**  
Clothing Sizes  
Create Member Notes  
Dissolution of Family Groups  
Internal Memberships  
Member Protection  
Register Members for Current or Next Season  
Transactions  
Update Member Declarations  
Update Member Details  
Update Member Source Companies  
Update Membership Categories

Filter Available Members further: (recommended)

Member ID:

First Name:

Last Name:

**Also remove Members from:**

☒ Internal Memberships
 ☒ Patrol Teams  
 By removing this members from patrol team you will also remove any patrol substitution requests linked to this members in their specific team.

☒ Mailing Groups

Search

**Available Members:**

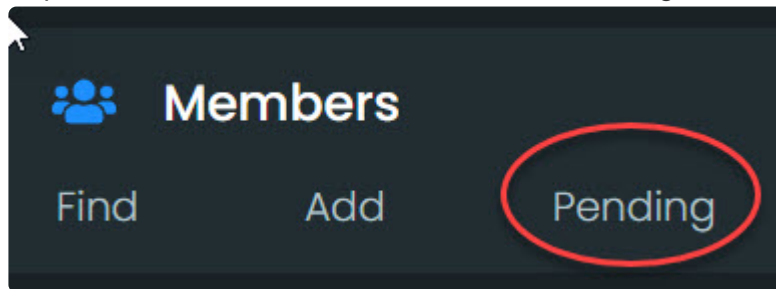
Account, Test (5738880) 05/02/1969 - 2017/2018
Ahsan, Feedaa (5734454) 25/09/2011 - 2017/2018
Ahsan, Kazi (5734085) 15/01/1982 - 2017/2018
allens, stevie (5639220) 01/06/2001 - 2017/2018

**Selected Members: \***

--

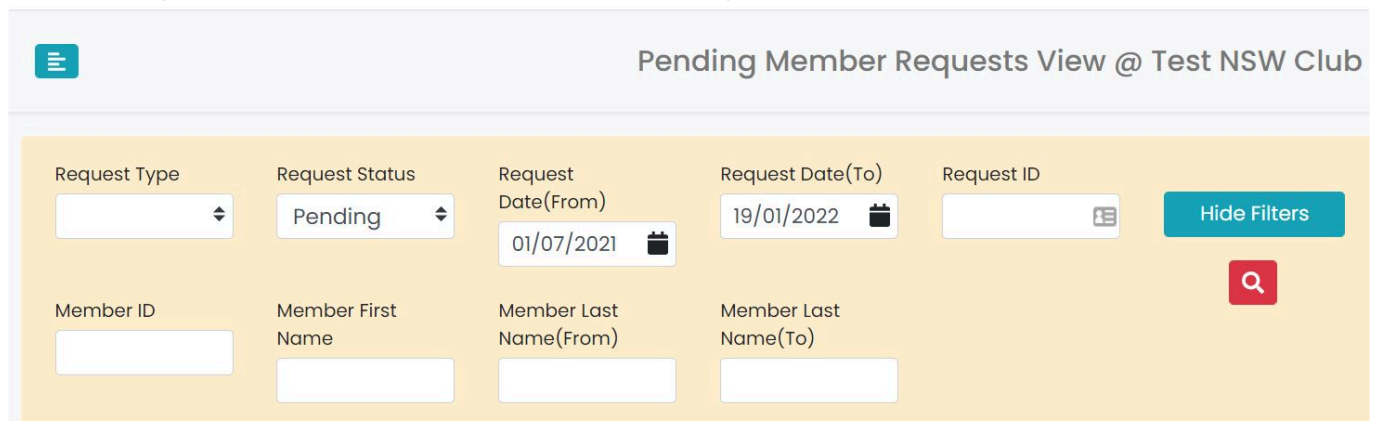
## 3.7 Pending Member Requests

Any pending request submitted by a member via their Members Area account must be approved by the club before the members details in Surfguard will be updated. Members can submit a number of pending requests via their Members Area account, including:-



- Dissolve Family Group
- Leave Family Group
- New Club Membership
- New Family Group
- New Family Group Member
- Renew Club Membership
- Update Personal Details

The Pending Request screen offers a number of filtering options.



The default status of Pending will display all incoming requests that have not been processed however you can filter to view those requests that have been 'completed', 'rejected' or 'archived'

**Request Status**

Pending

☐ Accepted

☐ Archived

☒ Pending

☐ Rejected

### Approving or Requesting from the Pending Request landing page

1. Tick the check box in the Select column beside each request you wish to process.
2. If a tick box in the select column cannot be ticked it means the request cannot be actioned until another process is completed example: A transfer
3. ? displayed in the 'link' column. Hover over the ? with your mouse to display a pop-up that will provide an explanation for why you cannot action the request
4. \$ symbol indicates that a transaction is attached to the pending request.
5. Select from either "Accept", "Reject" or "Archive" request(s)

**Pending Member Requests View @ Test NSW Club**

Request Type:  Request Status: Pending Request Date(From): 01/07/2021 Request Date(To): 19/01/2022 Request ID:  Hide Filters

Member ID:  Member First Name:  Member Last Name(From):  Member Last Name(To):

<input type="checkbox"/>	Request ID	Request Date	Member ID	Member Name	Sub-Membership Category	Season	Request Type	Request Status	Links
<input type="checkbox"/>	1159645	09/12/2021 13:20:20	6012363	Name, Rebecca	Probationary	2021/2022	New Club Membership	Pending	?
<input type="checkbox"/>	1162455	16/12/2021 17:26:28	6013386	Relation, Sally	Probationary	2021/2022	New Club Membership	Pending	?
<input type="checkbox"/>	1162456	16/12/2021 17:26:30	6013387	Relation, Molly	Probationary	2021/2022	New Club Membership	Pending	?



## 3.8 Transfers

The three types of transfers that can be processed are:

**Complete:** Used when the member is doing a complete transfer from one club to another club.

**Non-competition Rights:** used when transferring a member to another club, but keeping their competition rights with their original club. This will give the member Dual Membership at one or more clubs.

**Competition Rights:** used when moving a member's competition rights to another club, but still retaining their membership at their original club as a non-competitor. This will give the member Dual Membership at one or more clubs.

When initiating a transfer you can either transfer a member out of your club and into another club (Transfer Out) or choose a member from another club to transfer into your club (Transfer In).

An example of a transfer can be seen below:

### Membership Transfer Request @ Test NSW Club

#### Transfer Into Organisation

##### Losing Club

**State:**

**Branch:**

**Club:**

##### Enter either member ID or full name

**Member ID:**

**First Name:**

**Last Name:**

The process involves selecting the club that the member is coming from and then entering their details like a name or member ID if known. Assuming the member is found, a new screen will display asking for information relating to the transfer. Once submitted, the transfer will then be available in your "Transfer In" area of the main transfer Summary page.

The “Transfer Out” process is almost identical, but you are selecting a member from your club instead of another club.

Once a transfer has been created, the person’s contact phone number and email address will be displayed to allow the winning club to contact the member before the completion of the transfer.

Members can initiate a transfer via their Members Area account, this will appear as a pending member request in Surfguard (needs to be processed under the Transfers Tab in the first instance).

To view a list of membership transfers, select the relevant options from the drop-down menu in the search fields on the Transfer Summary page.

By clicking the ‘Incoming’ or ‘Outgoing’ links you can view a full list of the relevant members.

**Membership Transfers Request List @ Test NSW Club**  
[\[ Help \]](#)

[New Transfer In](#)
[New Transfer Out](#)

Type:

Winning Club:

Direction:

Sort By:

Status:

Losing Club:

Member Name:

Transfer Out

ID	Member ID	Name	Winning Club	Losing Club	Transfer Type	Create Date	Most Recent Action Date	Age	Status	Action
11880	4443605	bob hoskins	<a href="#">Test Vic Club</a>	<a href="#">Test NSW Club</a>	Full Transfer	18/09/2008	18/09/2008	0 days	New	<a href="#">Endorse</a> <a href="#">Not Endorse</a> <a href="#">Update</a> <a href="#">Delete</a>
<b>Total: 1</b>										

[New Transfer In](#)
[New Transfer Out](#)

From this screen, you can perform a number of actions, including approving or rejecting each transfer request if your access allows. As an example, after you click the ‘Endorse’ or ‘Not Endorse’ links you are taken to a screen that displays the individual’s details and allows you to action the transfer request by clicking ‘Submit’.

You can also view the contact details for the winning or losing club and their respective branch and state by clicking the club name. The summary information can also be sorted using filters contained in the drop-down options.

You can obtain further transfer information about a transfer by clicking the Transfer ID number. This will open a summary page about that member's transfer.

Transfer Details			
Transfer ID:	98057		
Transfer Type:	Non-competition rights		
Transfer Status:	Completed		
Winning Club			
Winning State:	Surf Life Saving NSW		
Winning Branch:	Test NSW Branch		
Winning Organisation:	TestNSW 2 Club		
Losing Club			
Losing State:	Surf Life Saving NSW		
Losing Branch:	Test NSW Branch		
Losing Organisation:	Test NSW Club		
Sub-Membership Category:	Non Member Participants		
Member Details			
Member ID:	4688026		
First Name:	test		
Last Name:	person		
Gender:	Male		
Date of Birth:	28/09/1995		
Contact Number:	9960734408		
Email Address:	vinit.chaware@fieldsolutions-group.com		
The member is in the following organisations:			
Organisation	Registered Season	Competitive Rights	Status
Test NSW Club	2017 - 2018	Yes	Active
TestNSW 2 Club	2018 - 2019	No	Active

Create Details	
Date:	18/02/2019
By:	Travis Klerck
Comment:	test
Endorsed/Not Endorsed Details	
Date:	18/02/2019
By:	Travis Klerck
Comment:	Endorsed.
Approved/Rejected Details	
Date:	18/02/2019
By:	Travis Klerck
Comment:	Approved.
Completed/Refused Details	
Date:	18/02/2019
By:	Travis Klerck
Comment:	Completed: test
Archive Details	
Date:	
By:	

See Transfer Process Below:

**Transfer Details**

Transfer ID: 603  
 Transfer Type: Full  
 Transfer Status: New

**Winning Club**

Winning State: Life Saving Victoria  
 Winning Branch: Flinders (District)  
 Winning Organisation: Gunnamatta

**Losing Club**

Losing State: Life Saving Victoria  
 Losing Branch: Morrong  
 Losing Organisation: Rossmore

**Member Details**

Member ID: 4621778  
 First Name: Georgia  
 Last Name: Cripps  
 Gender: Female  
 Date of Birth: 06/06/1968  
 Contact Number: 98940090

**The member is in the following organisations:**

**Can be created by Member via Lifesaving Online in Members Portal, Winning or Losing club**

**Action by "Losing" Club**

**Action by "Winning" Club**

**Create Details**

Date: 17/09/2015  
 By: Online Renewals  
 Comment: Initiated from Lifesaving Online.

**Endorsed/Not Endorsed Details**

Date:  
 By:  
 Comment:

**Approved/Rejected Details**

Date:  
 By:  
 Comment:

**Completed/Refused Details**

Date:  
 By:  
 Comment:

**Archive Details**

Date:  
 By:

**Action by 'Winning' or 'Losing'**

**Create** — this is done by either the winning or losing club or by a member via Lifesaving Online.

**Endorsed/Not Endorsed Details** — this step is done by the losing club.

**Approved/Rejected** — this step is done by the losing Branch or State office.

**Completed/Refused** — this step is done by the Winning club.

**Archive** — this step is done by either the Winning or Losing club.

When a transfer request has been initiated in SurfGuard a member's transfer history is displayed at the bottom of the screen.

Alternatively, a member transfer report can be obtained from the Reports section. (General Reports > Transfer Reports)

Hide Member Transfer History

Member Transfer History					
Transfer ID	Winning Organisation	Losing Organisation	Type	Status	Created Date
38584	Test QLD Club	Test NSW Club	Full Transfer	Archived (Completed)	19/12/2012
* 97022	Test NSW Club	Test QLD Club	Full Transfer	Completed	21/12/2018

\* Current transfer.

Total Full and Competitive-Rights transfers this calendar year (excluding this transfer): 0.

The system will also indicate how many transfer requests the member has had for the calendar year.

## 4. Education

---

The Education section contains 3 functions.

1. Assessment Request List
2. New Assessment Request
3. Assessment Candidate Qualification Check

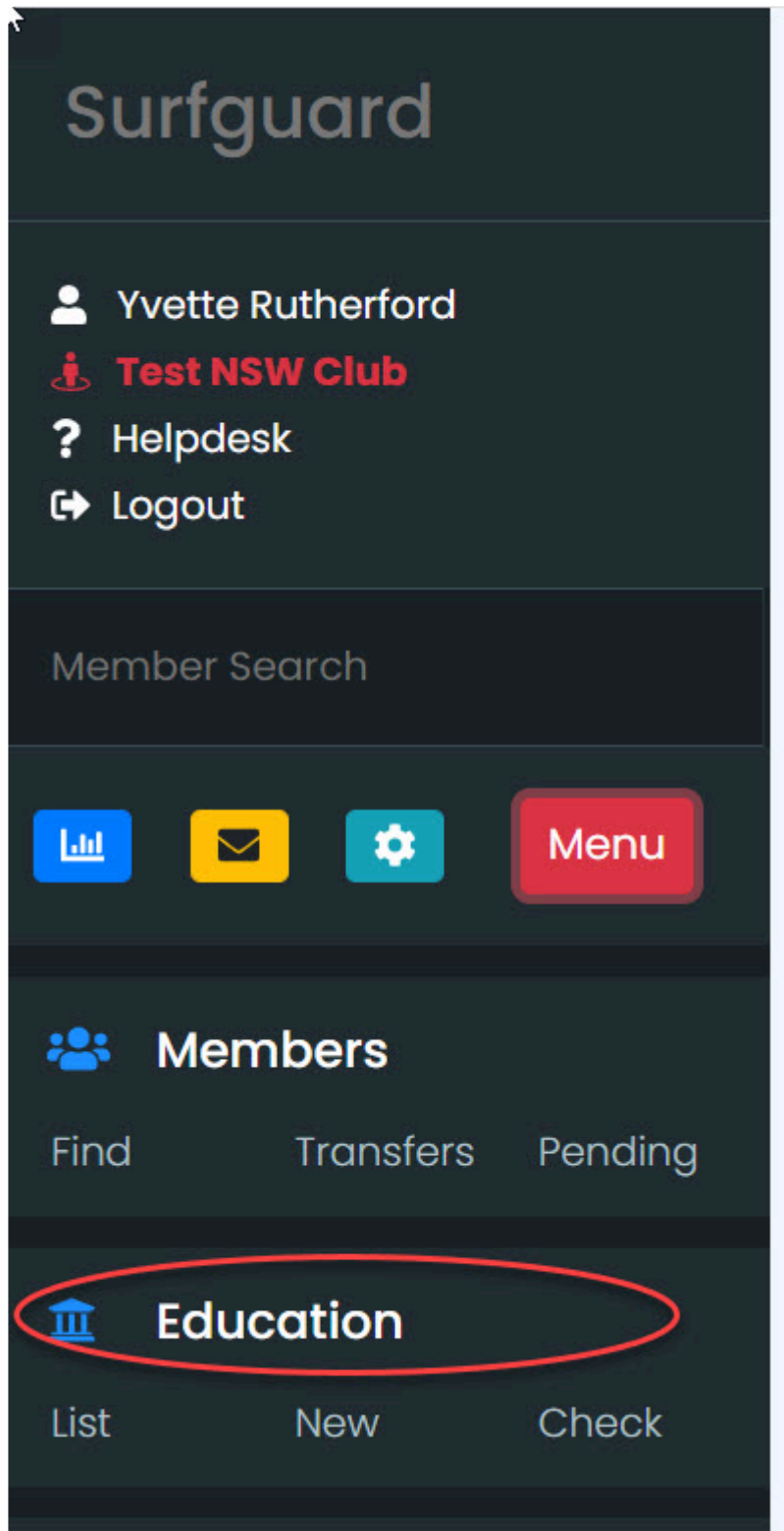
### Education

Assessment Request List

New Assessment Request

Assessment Candidate Qualifications  
Check

You can access these function from the quick link section located on the Surfguard landing page or click on the red 'MENU' tab and locate the 'Education' section.



## 4.1 Assessment Request List

---

By clicking the sub-menu item 'Assessment Request List' you can view all assessment requests that fall within your club.

Select from the drop-down filter options to short-list specific assessments.

Each assessment created is given an ID number. Click the ID number to see more information about a specific Assessment.

You can sort the list of assessments by ID, Assessment Type, Organisation, Number of Members,

Proposed Assessment, Activity Start Date or Status by clicking the respective column header.

**Assessment Request List @ Test NSW Club**

Assessment Status: All Assessment : ▾ Assessment Type: All Assessment : ▾ Award Type: All Awards Type: ▾ Award: All ▾

Proposed Date - From: 01/07/2021 📅 Proposed Date - To: 30/06/2022 📅 Activity Start Date - From: 📅 Activity Start Date - To: 📅 Assessment ID: 📅

Source Company: ▾

Hide Filters Clear 🔍

**Test NSW Club**

ID	Award/Qualification/UOC	Assessment Type	Organisation	No. of Members	Proposed Assessment Date	Activity Start Date	Status	Action
763532	Bronze Medallion	Bulk Proficiency	Test NSW Club	19	14/12/2021	14/12/2021	Complete	Enrolment Form Export Results Form 14 Print Attendance Sheet
759921	Junior Activities Preliminary Evaluation Under 10	Bulk Proficiency	Test NSW Club	1	25/11/2021	25/11/2021	Complete	Enrolment Form Export Results Form 14 Print Attendance Sheet

Each Assessment will display a 'Status'.

**Test NSW Club**

ID	Award/Qualification/UOC	Assessment Type	Organisation	No. of Members	Proposed Assessment Date	Activity Start Date	Status	Action
763532	Bronze Medallion	Bulk Proficiency	Test NSW Club	19	14/12/2021	14/12/2021	Complete	Enrolment Form Export Results Form 14 Print Attendance Sheet

- Incomplete: Assessment needs to be submitted, updated or deleted
- Awaiting Approval: Branch or State have to approve the assessment
- Approved: Assessment request has been approved by Branch or State but the assessment has not been done.
- Awaiting Candidate Approval: Results have been entered for each member as either:

**C** – Competent

**DNA** – Did Not Attend

**DNC** – Did Not Complete

**NYC** – Not Yet Competent

**RNG** – Recognition Not Granted

- Award Allocation: Done By State
- Complete : Archived by State

### Assessment Documentation

On the Assessment Request list under the "Action" tab there are a number of documents you can download and print relating to the assessment

- **Enrolment Form** – you can view, save and/ or print a PDF file which lists all the attendees for the specified course.
- **Attendance Sheet** — you can view, save and/ or print a PDF file which lists all the attendees for the specified course.
- **Form 14** — generates a pre-filled document with details of the assessment, candidate's details and Competency Status for the assessment.

To see what steps have been completed on an assessment look at the “Assessment History”.

### Assessment History

To see what steps have been completed in an assessment

1. Click the Assessment ID.
2. Scroll to the bottom of page
3. Click “Show Assessment History”

Hide Assessment History			
Assessment History			
Date	Action Performed	By	Level
Fri 29/03/2019 20:10:48	Created	System	National
Fri 29/03/2019 20:11:03	Submit	System	National
Fri 29/03/2019 20:11:11	Approve	System	National
Fri 29/03/2019 20:11:22	Process Results	System	National
Fri 29/03/2019 20:12:26	Approve Candidates	System	National
Fri 29/03/2019 20:13:52	Allocate Award(s)	System	National

## 4.2 New Assessment Requests

New Assessment Request page has a number of sections. Scroll down to view more details for some of the sections

1. Assessment Details
2. Award Details
3. Units of Competency
4. Contact Information
5. Assessors
6. Trainers
7. Enrolment Source Details
8. Comments
9. Candidates
10. List Candidates In Other Assessments
11. External Candidates

### Assessment Details

#### Assessment Type

- **Award** – Upon the successful completion of an assessment, the member is allocated the new



award(s)

- **Proficiency** – The member must already hold the award in order to participate in the assessment for a proficiency. Upon successful completion of the assessment, the member's award record(s) is/are updated with the proficiency date.
- **Bulk Proficiency** – One-step processing of Skills Maintenance/ Proficiencies. The bulk proficiency process cuts out three stages of the approval process in a current proficiency assessment (States can restrict function if they wish).
- **Credit Transfer** – Upon the successful completion of an assessment, the member is allocated new award(s) but does not have to actually sit an assessment since they already did the assessment at another external organisation. It is when an award is exactly the same. An example is Red Cross/ St John's First Aid, a member will be given Credit Transfer as it is identical as the SLSA award.
- **Recognition of Current Competence/ Prior Learning** – Upon the successful completion of an assessment, the member is allocated new award(s) but does not actually sit an assessment since they have the experience from such things as work, etc.

## Assessment Dates

New: Assessment Request @ Test NSW Club

Assessment Details	
Assessment Type: *	Award ▾
Time (24hr): *	12 ▾   00 ▾
Activity Start Date: *	07/06/2019 <small>(dd/mm/yyyy)</small>
Proposed Assessment Date: *	<input type="text"/> <small>(dd/mm/yyyy)</small>
Planned Total Training and Assessment Time in Hours :	<input type="text"/>
Planned Aquatic Activity Time in Hours :	<input type="text"/>
Commercial course / Fee for Service course:	<input type="checkbox"/>
Award Details	
Award Type:	All Awards Types ▾
Award:	<input type="text"/>
Delivery Mode:	Classroom based ▾
Funding Source:	Commonwealth and state general purpose recurrent ▾
Equivalent Award:	N/A
Allocate/Update Equivalent Award:	<input checked="" type="checkbox"/>
Do Not Allocate SLSA Award to Public Members:	<input type="checkbox"/>
Units of Competency	

*This is the date the candidates commence training*

*The date the candidates are assessed*

## Award Details and Units of Competency

### Award Types

The default is to display All Award Types, however, from the drop-down you can select

- AQTF Module
- AQTF Qualification
- AQTF Unit of Competency
- Other
- Recognition
- Service
- SLSA Education

## Awards

The awards drop-down will show all Awards based on the Award Type selected. **Note:** awards that have been created for a specific State will only display for Users in that State eg QLD Tractor Induction will only display for Queensland Users.

## Units of Competency (UOC)

The UOC's are all added in the Award creation and will prefill based on the selected Award.

**Award Details**

Award Type: SLSA Education  
 Award: Bronze Medallion  
 Delivery Mode: Classroom based  
 Funding Source: Domestic full fee-paying client  
 Equivalent Award: Certificate II in Public Safety (Aquatic Rescue) (PUA21012)  
 Allocate/Update Equivalent Award: ☒  
 Do Not Allocate SLSA Award to Public Members: ☐

**Units of Competency**

**Available:**  
 Provide cardiopulmonary resuscitation [CPR] (HLTAID001)

**Selected:**  
 Apply surf awareness and self-rescue skills (PUASAR012C)  
 Communicate in the workplace (PUACOM001C)  
 Follow defined occupational health and safety policies and procedures (PUAOHS001C)  
 Operate communications systems and equipment (PUAOPE013A)  
 Participate in an aquatic rescue operation (PUASAR013A)  
 Provide basic emergency life support (HLTFA211A)  
 Work effectively in a public safety organisation (PUATEA004D)

## Assessors and Trainers

If you need to add an Assessor or Trainer to an assessment you can search by either Member ID or First Name and Last Name. Once the Assessor or Trainers appears in Available on LHS you can use the > to move them across to Selected.

**Assessors**

Enter either the Assessor's Member ID or all or part of the Assessor's name before clicking Get Assessors/Facilitators.

Search Assessor Member ID:   
 Search Assessor First Name:   
 Search Assessor Last Name:   
 Get Assessors/Facilitators

**Available:**

**Selected:**

**Trainers**

Enter either the Trainer's Member ID or all or part of the Trainer's name before clicking Get Trainers.

Search Trainer Member ID:   
 Search Trainer First Name: Rebecca  
 Search Trainer Last Name: cocks  
 Get Trainers

**Available:**  
 Cocks, Rebecca (4625252; 05/ )

**Selected:**

## Candidates

To retrieve a list of eligible members for the Award you have two options

1. Search by Member ID, First Name or Last Name and click Get Candidates; or

2. Click Get candidates button

A list of members will appear that fulfil all prerequisite requirements for the chosen award. Eligible candidates, who fulfil all prerequisite requirements for the chosen award, will appear in Available on LHS you can use the > to move them across to Selected on RHS.

3. If a member does not display and you believe they are eligible, tick the box next to **Include Non-Financial Members**

Only members who are not already in another incomplete assessment request for the chosen award or proficiency will be listed in the available candidate's list.

Candidates:

Include Non Financial Members

3

Filter Available Members Further: (recommended for organisations with a large amount of members)

Member ID:

First Name:

Last Name:

Get Candidates

2

Available:

Aldrin, Buzz (4779544; 20/01/1930)  
Blackwood, Billy (4447623; 12/03/1973)  
female, test (5465608; 29/09/1996)  
Nnnnnnnnnnnnnnnn, Nnnnnnnnnnnnn (5883715; 02/10/2001)  
Officer, VS (5754790; 01/01/2002)  
Rescue, Surf (5754797; 01/01/1990)  
Sam, Test (5868203; 10/08/1999)  
Smith, John (5847062; 01/02/1990)  
Stewart, Jeannene (5849908; 20/04/1953)  
Test, Shelley (5654912; 14/10/1986)

>

<

Selected:

To view the prerequisites for an award, use the **Award Reference Report** at bottom of the screen.

### 4.3 Assessment Candidate Qualifications Check

If candidates, trainers or assessors do not appear when you are creating a new assessment, you need to select **Assessment Candidate Qualification Check** from the Education tab drop-down

1. If you have an Assessment ID enter the number and click Get Assessment Details
2. If you don't have an Assessment ID then make sure you
  - a. Select the correct Assessment Type
  - b. Enter the proposed Assessment Date
  - c. Select the Award from the drop-down

Scroll down to the Select Person section and

1. Select position for qualification check from the drop-down (either Candidate, Assessor, Training Officer)
2. Enter either the Member ID or First and Last Name
3. Click Check at bottom of the screen
4. The reason for the member, not displaying will appear in Results at bottom of the screen

## Assessment Candidate/TAF Qualifications Check @ Test NSW Club

## Assessment Details

Enter the Assessment ID or the Assessment and Award Details

Assessment ID:  [Get Assessment Details](#)Assessment Type: \* Proposed Assessment Date: \*  (dd/mm/yyyy)

## Award Details

Award Type: Award: \* Equivalent Award: Allocate Equivalent Award: ☒

## Units of Competency

Available:

Selected:

## Select Person:

Select position for qualification check:

☒ Include non financial candidate

Member ID:

First Name:

Last Name:

[Check](#) [Cancel](#)

## Results:

The candidate does not fulfill the prerequisite conditions for the award:

- Proficient in Bronze Medallion AND Proficient in IRB Crew Certificate. =&gt; The candidate does not hold the award IRB Crew Certificate. =&gt; The candidate is not proficient in Bronze Medallion

## 5. Organisational Management

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### 5.1 Organisational Details

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The Organisational Details sub-menu allows users to view the official contact details and other general details of their own Surf Lifesaving organisation.

Clubs, Branches and States can add their logo and other details that relate to the organisation.

It is vital that Clubs, Branches, and States complete this area accurately, as it determines how all other parts of the SLSA organisation contact you.

Users can *\*edit* *\*information* for which they have administrative access — in other words, Club Secretaries can only edit Club information and Branch officials can only edit Branch information, and so on.



### Organisational Details: Test NSW Club

Surf Life Saving NSW : Test NSW Branch

General Details		Physical Address	
Organisation ID:	544	Address Line 1:	Upstairs level
Display Name:	TEST NSW Club	Address Line 2:	789 botany rd
ABN:	123	Suburb:	rosebery
DGR Number:		State:	NSW
INC Number:		Post Code:	2018
Fundraising Authority No:	23452rtgdf	Country:	Australia
History:	This is a test club for ttesting purposes		
Organisation Colours:			
Logo Description:	blah blah blah		
Organisation Cap:			
Cap Description:	cap test		
Local Gov. Area:			
Beach Name:	Test Beach		
Beach Key:	nsw846790a		
Map Reference:	657678ffuy		
GPS Latitude (decimal format):			
GPS Longitude (decimal format):			
GPS Datum:			
Office Phone (with area code):	0292158000		
Office Fax (with area code):			
Email:	<a href="mailto:ithelp@slsa.asn.au">ithelp@slsa.asn.au</a>		
Website:	<a href="http://www.sls.com.au">www.sls.com.au</a>		
Facebook Url:			
Twitter Uri:			
Entity Phone (with area code):	0292158001		
Entity Fax (with area code):	029158000		

Postal Address	
Street & No:	upstairs 789 botany rd
Suburb:	Rosebery
State:	NSW
Post Code:	2018
Country:	Australia

Contact	
Name:	Helpdesk
Phone (with area code):	1300724006
Mobile:	

SMS Details	
SMS Enabled:	[x]
Max SMS/Year:	Unlimited

Edit

## 5.1.1 Bank Account Details

To view or edit the bank account details stored in Surfguard for a club or support entity, click Organisational Details > Bank Account Details.

To edit these details your Surfguard account must have Organisational Management permissions. Click on the Edit button to revise the stored details.

**Note:** DDR Form submitted can only be modified by national Surfguard users and this is only modified when a club or support entity signs up for the Payment Gateway. DDR form is required when initially setting up Payment Gateway.

Entities can make their banking account details become viewable to users within the Members Area and associated payment notification screens.

To activate this, check the Allow Direct Deposit box from within the Organisational Management Tab.  
(Organisational Details > Bank Account Details > Edit)

### Update Bank Account Details @ Test NSW Club

#### Bank Account Details


**BSB Number: \***  -

**Bank Account Number: \***

**Bank Account Name: \***

**Email Address: \***

**Is Default Bank Account:** ☒

**Allow Direct Deposits:** ☒ 

#### Online Payment Gateway

**DDR Form Submitted:** [ ]

**DDR Form Unsubscribe Date:** N/A

See how the banking details display to users below

## SURF CLUBS

### Test NSW Club

Branch	Test NSW Branch
State	Surf Life Saving NSW
Registered Season	2018
Membership Category	Award Member
Competition Rights	Yes
Competition Age Category	Under 21
Child Protection Completed	Yes (Expires 06/05/2020)
Online Payments	<b>Direct Deposit Information</b>

https://members.sls.com.au/SLSA\_Online/include/commonFun...  
https://members.sls.com.au/SLSA\_Online/include/commonFunctions/p...

### Bank Details - Test NSW Club

BSB Number: 111222  
Account Number: 12345678  
Account Name: TEST

[Close Window]

## 5.2 Service Profiles

The 'Service Profiles' sub-menu takes you to a screen that allows you to further edit the profile of your Club.

This includes nominating the Club's service hours and patrol details.

It is important that each organisation's Service Profile is kept up-to-date as this information is transferred to the Beachsafe website.

If your club patrols at more than one beach, a service profile must be created for each beach.

If a service profile is created/ edited the page will provide a time stamp of who last updated the section, with a date and time.

If your club patrols at more than one beach, you must create a service profile for each beach.

Go to Organisational Management > Service Profile > Add Beach Profile

Click the relevant link to edit each section of the Profile

Service Profiles @ Test NSW Club - test1a

**Select a Beach:**

> test1a

test2

Add Beach Profile

Beach: test1a [Edit Beach Name](#)

Date Period	Service Hours	Edit Delete
01 Jan - 07 Feb	Mondays:	08:00 - 18:00
	Tuesdays:	04:00 - 18:00
	Wednesdays:	08:00 - 18:00
	Thursdays:	00:00 - 00:00
	Fridays:	00:00 - 00:00
	Saturdays:	11:00 - 18:00
	Sunday/Public Holidays:	08:00 - 18:00
<p>Last Updated By: Travis Klerck</p> <p>Updated Date: 03/09/2018 22:53:17</p>		
08 Feb - 01 Jun	Mondays:	08:00 - 16:00
	Tuesdays:	12:00 - 15:00
	Wednesdays:	12:00 - 15:00
	Thursdays:	12:00 - 15:00
	Fridays:	00:00 - 00:00
	Saturdays:	08:00 - 16:00
	Sunday/Public Holidays:	08:00 - 16:00
<p>Last Updated By: Rebecca Cocks</p> <p>Updated Date: 07/02/2017 08:28:21</p>		
	Mondays:	09:00 - 10:00
	Tuesdays:	09:00 - 10:00

## 5.3 Committees

The 'Committees' sub-menu allows clubs to group members into functional committees.

You can assign new committee's a name and nominate positions including the chairperson, secretary,



treasurer, and members by completing the 'Add Committee Details'

To view an existing committee click the 'Name' link and a list of those committee members will be displayed.

To edit an existing committee click the 'Members' button in the User Options and change the composition of a committee by selection a member from the left side column and placing them into the right side column. Click 'Save'

### BOM 19/20 Membership Settings

Aaron, Kate (3660875) 11/11/1987	< Chairperson >	Fownes, Paul (3660067) 08/08/1962
Aaron, Rosalie (5795589) 08/12/2012	< Secretary >	Garay, Marcelo (4644005) 21/10/1965
Ackman, Aisha (5857425) 19/04/2011	< Treasurer >	Rutherford, Yvette (3660048) 06/05/1966
Adams, Blaze (5848154) 23/08/2012		Cooney, Nicole (5494048) 22/05/1978
Adams, Miller (5848156) 06/03/2014		McLean, Darren (4668934) 08/08/1968
Adlawan, Samantha Kyleigh (5849206) 05/03/2014		Perrin, Linda (3659954) 01/12/1960
Airlie, Cameron (4475338) 26/03/1982		Turton, Greg (5666970) 29/09/1971
Alban, Isaac (5852278) 28/02/2013		
Alexiou, Amelia (5701077) 15/02/2011		
Alexiou, Damien (5416345) 26/05/1975		
Alexiou, George (5653101) 19/03/1969		
Alexiou, Jasmine (5596564) 10/12/2007		
Alexiou, Liliana (5581384) 14/08/2005		
Alexiou, Matthew (5416339) 24/07/2007	< Member >	

To remove the committee from the database, click the 'Delete' button.

Most Clubs have a number of Committees and each Club should have a Surfguard record of their Management, Lifesaving, and Surf Sports Committees.

### Committees @ South Maroubra

#### Add Committee Details

Name:

**Please select the positions you require to be on this Committee/Board**

Positions:

Type: ☒ Committee ☐ Board

Name	Type	User Options
<a href="#">BOM 19/20</a>	Board	<input type="button" value="Members"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
<a href="#">Competition Committee 19/20</a>	Committee	<input type="button" value="Members"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
<a href="#">Constitution Committee 19/20</a>	Committee	<input type="button" value="Members"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
<a href="#">Disciplinary Committee 19/20</a>	Committee	<input type="button" value="Members"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
<a href="#">Endorsed Club Trainers &amp; Assessors</a>	Committee	<input type="button" value="Members"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
<a href="#">Finance Committee 19/20</a>	Committee	<input type="button" value="Members"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
<a href="#">Life Membership Committee 19/20</a>	Committee	<input type="button" value="Members"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
<a href="#">Lifesaving Committee 19/20</a>	Committee	<input type="button" value="Members"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
<a href="#">Sub Committee Heritage Room Memorabilia</a>	Committee	<input type="button" value="Members"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
<a href="#">Trainers &amp; Assessors incl probat</a>	Committee	<input type="button" value="Members"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
<a href="#">Youth Committee 19/20</a>	Committee	<input type="button" value="Members"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>

## 5.4 Internal Memberships

The 'Internal Memberships' sub-menu has two options which allows you to manage internal memberships or add new internal membership categories.

Internal memberships are those specific to your club but are not recognised outside the club, such as gym membership, social club membership, school groups etc

### Internal Memberships @ South Maroubra

Internal Membership Category	Display Order	User Options	
Gold Member 2019	1	Edit	Delete
Gym Member 2019	2	Edit	Delete
Dolphins 2019	3	Edit	Delete
GYM 2018	4	Edit	Delete
Gold Member 2018	5	Edit	Delete
Add New Internal Membership Category			

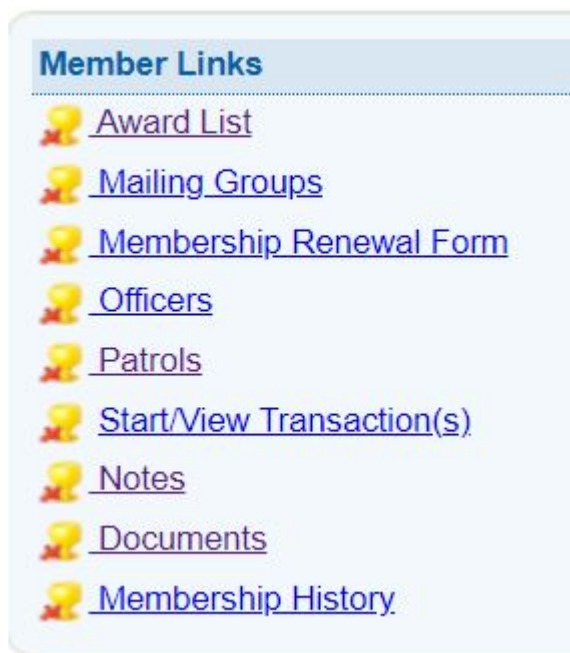
### Mailing Groups

As above, Mailing Groups can be assigned to a member via a Members File (or via the Mailing Group section of Surfguard).

Creation of Mailing Groups are managed via the Organisational Management section of Surfguard. Members in a Patrol are automatically in a Patrol Mailing Group

### Member Links

Quick links are available when viewing or editing a members file to access further member information.



### Membership Renewal Form

If you have opened a members file and click on the Membership Renewal Form link, a pre-filled in membership form will be displayed that a club can print out and have the member sign.

## 5.4.1 Adding Internal Memberships

To add a new category of internal membership, use the sub-menu option or click the 'Add New Internal Membership Category' button.

This will take you to the 'Add New Internal Membership' screen, which allows you to nominate the name of a Internal Membership Category

A screenshot of a web form titled 'Add New Internal Membership @ Test NSW Club'. The form has a light blue background. It contains two input fields: 'Int'l Membership Category: \*' with the value 'Childcare Centre' and 'Display Order:' with the value '2'. Below the input fields are three buttons: 'Save', 'Clear', and 'Cancel'.

The display order column will simply display the internal memberships in your selected order.

To add members to an Internal Membership Category, you must move them into the category while editing the member's record within the Internal Memberships field box.

**Internal Memberships**

Perpetual Including L  
5Yrs No Locker or G  
10Yrs Including Lock  
10 Yrs No Locker or

>

<

Nippers Parents  
Patrol team 13

## 5.4.2 Bulk Processing Internal Memberships

If you have many members who need to be added to an Internal Membership you can use Bulk Processing:

1. Go to Bulk Processing under the Members tab.
2. Select Process Type — Internal Membership.
3. Select Internal Membership Category.
4. Click Search and move members to be added across to Selected Members.

**Bulk Processing for Test NSW Club**

Process Type: Internal Memberships

[Filter Available Members further: \(recommended for organisations with a large amount of members\)](#)

Member ID:

First Name:

Last Name:

Internal Membership Category: Gym

☒ Add Members  
☐ Remove Members  
☐ Include Non-Active Members

Available Members: Selected Members: \*

## 5.5 Officers

The Officers menu has three sub-menus under it: Officers, New Officer Position, and Officer Position Synonyms.

All three items relate to the establishment and management of individuals ('Officers') who have specific responsibilities within your club.

To view the member details of an Officer, simply click their name.

You can change the data on this screen by clicking the 'New', 'Edit' or 'Delete' buttons, as shown below in

**View Officers @ Test NSW Club**

**Held Position From:** 
**To:** 

**Format:** dd/mm/yyyy

Position Name	Requirement Level	Officer	From	To	Officer Position Options	Officer Options
Chairman	National, State, Branch, Club	<a href="#">Bee McGinty, Bumble</a>	31/05/2018	22/09/2018		<input type="button" value="New"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Digital Communications Executive	State, Branch, Club					<input type="button" value="New"/>
HAMster	State, Branch, Club					<input type="button" value="New"/>
MPIO	State, Branch, Club					<input type="button" value="New"/>
Medic	State, Club					<input type="button" value="New"/>
After Hours Emergency Contact	State, Branch, Club					<input type="button" value="New"/>
BBQ Chef	Club				<input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="button" value="New"/>
Chief Training Officer	National, State, Branch, Club	<a href="#">Klerck, Travis</a>	30/08/2018	22/12/2019		<input type="button" value="New"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Complaints Officer 1	National, State, Branch, Club	<a href="#">Cocks, Rebecca</a>	01/06/2019	31/12/2020		<input type="button" value="New"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Complaints Officer 2	National, State, Branch, Club					<input type="button" value="New"/>
Complaints Officer 3	National, State, Branch, Club					<input type="button" value="New"/>
Digital Communications Executive	Club				<input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="button" value="New"/>
JS Tester	Club	<a href="#">Testerman, Joshua</a>	28/06/2018	28/06/2019	<input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="button" value="New"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Junior Activities	National, State, Branch, Club					<input type="button" value="New"/>
Lifesaving	National, State, Branch, Club	<a href="#">Klerck, Travis</a>	30/05/2018	24/06/2019		<input type="button" value="New"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
MPIO Officer for Claire	Club				<input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="button" value="New"/>
Member_Services	State, Branch, Club					<input type="button" value="New"/>
OH&S	State, Branch, Club					<input type="button" value="New"/>
OHS Assessor	Club				<input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="button" value="New"/>

See Webinar below on how to assign Administrative Functions in the Officer section in SurfGuard.

## 5.5.1 Setup New Officer Position

Surfguard – Organisational Management – Officers.

When viewing the Officers section in Surfguard a list of Officer Position will present.

To add a new Officer position to your club, click the 'New Officer Position' sub-sub-menu. This will open another screen that allows you to enter the name of the new position

Position Name	Requirement Level	Officer	From	To	Officer Position Options	Officer Options
Administration	National, State, Branch, Club					New
COVID Co-ordinator	National, State, Branch, Club					New
Club Historian	State, Club					New
Club Membership Officer	State, Club					New
Club Safety Officer (OHS)	State, Club					New
Competition Coach	State, Club					New
Complaint Manager 1	National, State, Branch, Club	<a href="#">Cocks, Rebecca</a>	25/01/2022	31/12/2023		New Edit Delete
Complaint Manager 2	National, State, Branch, Club	<a href="#">Rutherford, Yvette</a>	01/04/2021	30/06/2025		New Edit Delete
Complaint Manager 3	National, State, Branch, Club					New

Type in the name of the new Officer Position and hit **SAVE**.

**Setup Officer Position @ Test NSW Club**

**Officer Position**

Officer Position Name:

## 5.5.2 Adding and Editing an Officer Position

To add a member to an Officer Position click on the 'NEW' link under 'Officer Options' for the relevant position.



**View Officers @ Test Vic Club**

Held Position From:  To:   Format: dd/mm/yyyy

Position Name	Requirement Level	Officer	From	To	Officer Position Options	Officer Options
Administration	National, State, Branch, Club				<input type="button" value="New"/>	
COVID Co-ordinator	National, State, Branch, Club				<input type="button" value="New"/>	
Club Historian	State, Club				<input type="button" value="New"/>	
Club Membership Officer	State, Club				<input type="button" value="New"/>	
Club Safety Officer (OHS)	State, Club				<input type="button" value="New"/>	

From the Officer drop down box – select the member  
Select starting and finishes dates.

Tick the checkbox 'Use Alternative Email' if an alternative email address for the Officer is to be used. If the alternative email field is not used then specific officer role email notifications will be sent to the email address contained within the Officers Surfguard membership file (this could possibly be a private/home email address).

Note: If an Officer has engaged the 'User Alternative Email' function then specific officer role email notifications such as Active Kids vouchers, New Members Joining, Membership Renewals and pending Form Approvals will be sent to the alternative email recorded.

**Setup Officer @ Clovelly**

**Allocate Officer**

Officer Position Name: Communication - Social Media

Officer: \*

From Date: \*

To Date: \*

☒ Use alternate email (Optional) for communication for this officer role. If not selected then communication will default to the officer's personal email which is [ithelp@slsa.asn.au](mailto:ithelp@slsa.asn.au)

Alternate Email:

Select the Administrative Functions you wish to assign

**Administrative Functions**

☐ Approve Members Area News content

☐ Approve Members Area Library content

☐ SLISA Online Member Store/Shop Administrator

☐ Online Form Approver

Clubs can 'EDIT' existing Officer Positions

By 'EDITING' the Officer position you will be able to select a new Officer, select a date and assign Administrative Functions.

Click the 'Edit' link for the Officer Position that needs changing.

Complaint Manager 1	National, State, Branch, Club <a href="#">Cocks, Rebecca</a>	25/01/2022	31/12/2023	New	Edit	Delete
Complaint Manager 2	National, State, Branch, Club <a href="#">Rutherford, Yvette</a>	01/04/2021	30/06/2025	New	Edit	Delete
Complaint Manager 3	National, State, Branch, Club			New		

## 5.5.3 Officer Position Synonym

When viewing the Officers section in Surfguard a list of Officer Positions will present.

Clubs can rename the default list of available Officer Roles. The Officer Position Synonyms area is used to rename positions that have been set by SLISA. For example, your club might call their Education position a Surf Teacher, therefore, renaming the positions to better relate to your organisation.

To rename your officer positions simply navigate to the Officer Position Synonym section in SurfGuard. (Organisational Management > Officers > Officer Position Synonym)

**View Officers @ Test Vic Club**

Held Position From:  To:  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					New
COVID Co-ordinator	National, State, Branch, Club					New
Club Historian	State, Club					New
Club Membership Officer	State, Club					New
Club Safety Officer (OHS)	State, Club					New
Competition Coach	State, Club					New
Complaint Manager 1	National, State, Branch, Club <a href="#">Cocks, Rebecca</a>	25/01/2022	31/12/2023		New	Edit Delete
Complaint Manager 2	National, State, Branch, Club <a href="#">Rutherford, Yvette</a>	01/04/2021	30/06/2025		New	Edit Delete
Complaint Manager 3	National, State, Branch, Club				New	

To rename a position simply type the new position name in the box next to the Officer Name and hit 'Save'

**Officer Position Synonyms @ Test NSW Club**

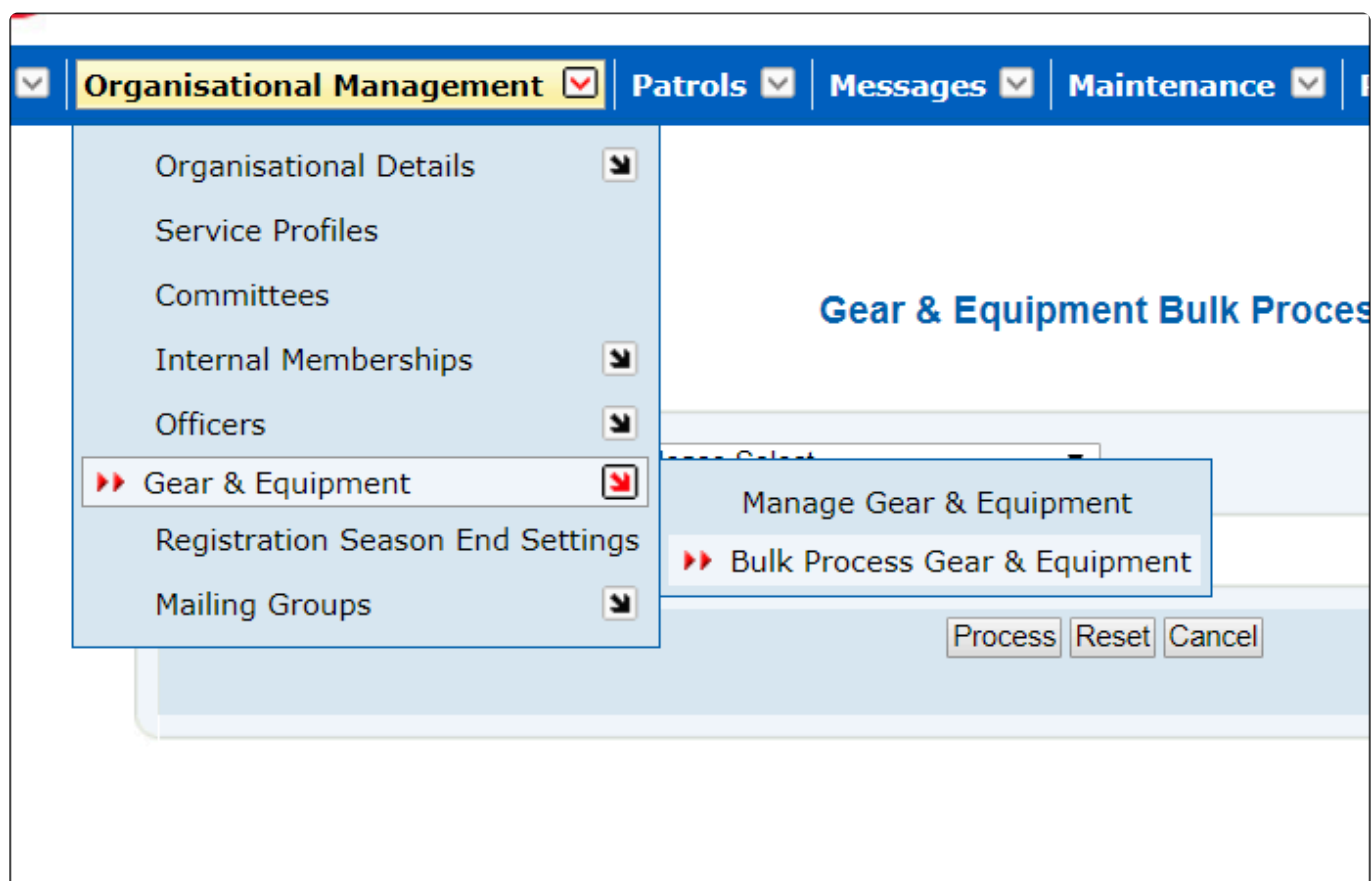
Officer Name	Officer Synonym
Active Kids Voucher 1	<input type="text"/>
Active Kids Voucher 2	<input type="text"/>
Active Kids Voucher 3	<input type="text"/>
Administration	<input type="text" value="secretary2"/>
After Hours Emergency Contact	<input type="text"/>



## 5.6 Gear and Equipment

'The Manage Gear & Equipment' sub-sub-menu option allows you to view a list of all the equipment, tools and other resources that the club owns. From this screen, any item's details can be added/modified by clicking the 'Manage' button. — from there you can add, edit and delete items of equipment. Each piece of equipment is allocated specific attributes that relate to the type of equipment.

Users can also Bulk Process Gear and Equipment from here.



### 5.6.1 Manage Gear & Equipment

How to print a checklist

To print a checklist for a piece of equipment, select the "Print Checklist" button beside the required piece of equipment. You can only print a checklist when you have entered at least one piece of gear into an equipment type.

You can also print a "View Patrol Equipment Checklist" from the screen shown in the Gear and Equipment management screen.

**View Gear & Equipment @ Test NSW Club**

☐ Add blank columns when printing checklist(s)

Print All Checklists View Patrol Equipment Checklist

Type	Total	Options
Administration Equipment	0	<span>Manage</span>
Beach Vehicle (ATV)	0	<span>Manage</span>
Buildings and Structures	0	<span>Manage</span>
Club Equipment	0	<span>Manage</span>
Competition Equipment	1	<span>Manage</span> <span>Print Checklist</span>
Computer and Electrical	0	<span>Manage</span>
Defibrillator	0	<span>Manage</span>
First Aid Equipment	0	<span>Manage</span>
Fuel Cell	0	<span>Manage</span>
Inflatable Rescue Equipment	0	<span>Manage</span>
IRB	1	<span>Manage</span> <span>Print Checklist</span>
IRB Motor	0	<span>Manage</span>

## 5.7 Registration Season End Settings

“Registration Season End Settings”, under Organisational Management allows clubs to manage the end of their season.

Clubs will now need to mark when their registration season ends in order to freeze the Summary statistics for Membership Categories.

If the registration season summary statistics period is not ended manually, it will be automatically ended on June 30 of the current year at 11:59pm EST.

The ending of the registration season only affects the Summary screen.

### Registration Season End Settings @ Test NSW Club: 2018 Season

#### Display Criteria

Season:

#### Organisation

Test NSW Club

#### Membership Statistics End Date

#### Information

Closing the summary statistics for the current season will affect the Membership Categories summary screen only.

Doing so will mean that any changes to a member's membership details (e.g. archiving the member) from this date onwards will NOT be reflected in the Membership Categories summary for this season.

This will not affect Reports. Any changes made to a member's details after the close date will still be reflected in Reports.

If the registration season summary statistics period is not ended manually, it will be automatically ended on June 30 of the current year at 11:59pm EST.

Please contact the help desk if the membership statistics for the current season were closed accidentally and need to be re-opened.

## 5.8 Price List

All clubs must have a fee price list in Surfguard for their members to Renew or Join online. A member will not be able to Join or Renew if no prices are entered.

### Key Points to Remember

- Initially the prices list will only be available at a club level.
- The age restrictions for each SLSA sub-membership category are used when calculating joining fees that will display to new members joining via <https://join.sls.com.au>.

### Enforced Credit Card Payment

The setup of the Price List in Surfguard is that all members joining, or renewing must make a payment by credit card at the time they submit their online membership application.

Clubs do have the ability to turn off the enforced credit card payment.

Menu > Maintenance > Payment Methods.

If clubs do turn off 'Enforce Credit Card Payments', then they need to make sure they have their bank account details in Surfguard and have ticked the box for them to be displayed.

Menu > Organisational Management > Bank Account Details >

Edit, make sure Allow Direct Deposits is ticked.

The new Price List page can be accessed in Surfguard by Menu > Organisation Management > Price List.

The default display shows all club sub-membership categories in alphabetical order and an additional category called Other.

For each of these categories there are 4 headings

1. Transaction Type – prices for all SLSA default Transaction Types can be selected
2. Price – Will display the amount for the specific item eg \$60.00

3. Status – Once prices are created the status will display either Enabled or Disabled

4. Action – the default is Add Item, once prices are added options will include Update & Delete

View Price List @ Coogee (NSW)				
Price List				
	Transaction Type	Price	Status	Action
Active (15-18 yrs)				<a href="#">Add Item</a>
Active (18yrs and over)				<a href="#">Add Item</a>
Associate				<a href="#">Add Item</a>
Award Member				<a href="#">Add Item</a>
Cadet Member (13-15 years)				<a href="#">Add Item</a>

Price List				
	Transaction Type	Price	Status	Action
Active (15-18 yrs)				<a href="#">Add Item</a>
Gym Fee	Gym fee	\$60	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>
New Bronze Candidate 15-17yrs [?]	Joining Fee	\$250	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>
Locker Key Renewal	Locker key	\$20	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>
New Locker - Deposit [?]	Locker key	\$20	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>
Renewal Fee 2021/22 Season	Membership fee	\$30	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>

### Creating the Price List

Clubs have a couple of options when creating their price list

- Option 1 – Add prices to specific sub-membership categories used by your club
- Option 2 – Create a simple price list using Other
- Option 3 – Use a combination of both

Option	Advantages	Disadvantages
Option 1 - Add prices to specific <b>sub-membership categories</b> used by your club	Renewing members will only see prices that are specific to their sub-membership category	Initial setup in Surfguard is longer as the prices need to be added to each sub-membership category used at the club
	New members joining will only see prices for sub-membership categories that match their age.	No ability to have family group prices
• Option 2 - Create a simple price list using <b>Other</b>	Quick and easy to setup	Renewing & new members joining will see multiple prices to choose from
	Caters for family groups	
• Option 3 - Use a combination of both	Renewing members will only see prices that are specific to their sub-membership category	Initial setup in Surfguard is longer as the prices need to be added to each sub-membership category used at the club and Other
	New members joining will only see prices for sub-membership categories that match their age.	
	Caters for family groups	

### Using Option 1– Using Sub-Membership Categories Used by your Club

1. Click Add Item and a new screen will display, compulsory fields are indicated by \*

A. Header: – indicates the sub-membership category price is added to

B. Price Item Name: the name of each price item must be unique in each category. ie you can have a price item called Gym in multiple categories, but you can't have two price items called Gym in the same category.

C. Transaction Type: select from the drop-down. Fees that hold the Transaction Type 'Membership Fee' will be displayed in the Members Area. Fees with the transaction Type 'Joining Fee' will be displayed in the Join system.

D. Price (\$): There is no need to add the dollar sign it will display as a default. For whole dollar amounts you only need to type the amount eg. If the membership fee is \$55.00 you only need to type 55

E. Description: (Optional) Any description entered will show as a ? pop-up when you display the price list.

This is how member will be able to read more information about the item.

F. Status: the default option is Enabled, and the second option is Disabled. You may choose to use this if you have a fee for a certain period, eg Early Bird Payment. You can then disable it once the Early Bird has finished.

G. Click Add or Cancel: Click Add to save the price item and Cancel to delete the item.

Once you click Add a confirmation screen will confirm that the pricing item is successfully added.

**Add price item to Active (15-18 yrs)** A

B Price Item Name: \*

Transaction Type: \* C

D Price (\$): \*

Description: E

F Status: \*

G

### Sample Price Lists

In the price list below: -

- Several items have been added to the Active (15-18 yrs) sub-membership category.
- All entries are sorted alphabetically by Transaction Type and then by Price List Item Name
- A description has been added to the Hi-Vis Vest item as indicated by the ? Hover over the question mark icon to view the description.
- The "Late Membership Renewal Fee 2021-22 Season" is currently Disabled.

Price List				
	Transaction Type	Price	Status	Action
<b>Active (15-18 yrs)</b> <a href="#">Add Item</a>				
Gym Fee	Gym fee	\$30	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>
New Member	Joining Fee	\$100	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>
Late Membership Renewal Fee 2021-22 Season	Membership fee	\$75	Disabled	<a href="#">Update</a>   <a href="#">Delete</a>
Membership Renewal Fee 2021-22 Season	Membership fee	\$55	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>
Club Cap	Merchandise	\$15	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>
Hi-Vis Vest <span style="color: blue;">[?]</span>	Merchandise	\$10	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>



Price List				
	Transaction Type	Price	Status	Action
<b>Active (15-18 yrs)</b> <a href="#">Add Item</a>				
Fob Replacement	Club key	\$20	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>
Gym Fee	Gym fee	\$60	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>
New Bronze Candidate 15-17yrs [?]	Joining Fee	\$250	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>
Locker Key Renewal	Locker key	\$20	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>
New Locker - Deposit [?]	Locker key	\$20	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>
Renewal Fee 2021/22 Season	Membership fee	\$30	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>
<b>Active (18yrs and over)</b> <a href="#">Add Item</a>				
Fob Replacement	Club key	\$20	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>
Gym Fee	Gym fee	\$60	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>
New Bronze Candidate 18-21yrs [?]	Joining Fee	\$250	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>
New Bronze Candidate 22yrs+ [?]	Joining Fee	\$350	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>
Locker Key Renewal	Locker key	\$20	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>
New Locker - Deposit [?]	Locker key	\$20	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>
Renewal Fee 2021-22 Season	Membership fee	\$55	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>

### Using Option 2 – Create a Simple Price List Using Other

For very simple price lists and for club's price lists that include Family Groups you can use the 'Other' category

- 1 Scroll down to the bottom of the Price List categories to **Other** and Click **Add Item**
- 2 If you select a Transaction Type of Membership Fee or Joining Fee from the drop-down then an additional field will display called 'Related to Family Group'.
- 3 Tick the box if the Price Item does relate to a family group and leave blank if it doesn't

#### Add price item to Other

Price Item Name: \*
2 Adults & 2 Children Family Gr

Transaction Type: \*
Membership fee

Related to Family Group:
☒

Price (\$): \*
150.00

Description:
This membership fee is for a maximum of 2 adults and 3 children. All children must be under 18 years.

Status: \*
Enabled

Add Cancel

**Sample Price List**

Other					<a href="#">Add Item</a>
Gym Fee	Gym fee	\$20	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>	
Additional Nipper	Joining Fee	\$70	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>	
Family Group - Up to 2 Adults & 2 Children	Joining Fee	\$200	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>	
Senior Membership Fee	Joining Fee	\$55	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>	
Additional Nipper	Membership fee	\$70	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>	
Family Group - Up to 2 Adults & 2 Children	Membership fee	\$200	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>	
Senior Membership Fee	Membership fee	\$55	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>	

Using Option 3 – Use a combination of both sub-membership categories & Other

**Sample Price List**

Junior Activity Member (5-13 years)					<a href="#">Add Item</a>
New Nipper Joining	Joining Fee	\$140	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>	
Renewal Fee 2021/22 Season	Membership fee	\$140	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>	
Nipper Cap	Merchandise	\$10	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>	
Life Member					<a href="#">Add Item</a>
Gym Fee	Gym fee	\$0	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>	
Membership Fee	Membership fee	\$0	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>	
Long Service					<a href="#">Add Item</a>
Gym Fee	Gym fee	\$90	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>	
Locker Key Renewal	Locker key	\$30	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>	
New Locker - Deposit [?]	Locker key	\$20	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>	
Renewal Fee 2021-22 Season	Membership fee	\$70	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>	
Reserve Active					<a href="#">Add Item</a>
Gym Fee	Gym fee	\$90	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>	
Locker Key Renewal	Locker key	\$20	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>	
New Locker - Deposit [?]	Locker key	\$20	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>	
Membership Fee	Membership fee	\$70	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>	
Other					<a href="#">Add Item</a>
Fob Replacement	Club key	\$20	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>	
Family Group- Up to 2 Adults & 3 Children	Joining Fee	\$100	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>	
50 Year Member	Membership fee	\$0	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>	
Family Group- Up to 2 Adults & 3 Children	Membership fee	\$100	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>	
Perpetual Member [?]	Membership fee	\$0	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>	
Swimming Costume - Female	Merchandise	\$80	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>	
Swimming Costume - Male [?]	Merchandise	\$40	Enabled	<a href="#">Update</a>   <a href="#">Delete</a>	



## Email Notifications & Viewing Orders

### New Member/s Joining Email Notification

Once a new member application is submitted via Join an email is sent to the email address in Organisational Details in Surfguard including the details of the order.

### Payment Gateway Email Notifications

Club officers who have been added to the email notifications for payments made by the Payment Gateway will continue to receive payment notification emails.

### Viewing Orders via Reports in Members Area

Orders can be viewed in the Members Area > Reports > Orders

## **5.8.1 Price List Frequently Asked Questions**

### **Do I have to add prices to the Surfguard Price list now?**

Yes, if your club uses online renewals and online joining. As a minimum clubs must have Membership (Renewing members) & Joining (new members joining) fees in Surfguard for any sub-membership category that is used by their club or in the Other section. If there are no prices entered, existing members will not be able to renew their membership via <https://members.sls.com.au> and new members will not be able to join via <https://join.sls.com.au>

### **How do members pay for items that are not part of a Renewal or Join?**

1. Club using Online Joining & Renewals and registered for SLSA Payment Gateway

We recommend clubs who use the Price List feature on the Payment Gateway should update their Payment Gateway price list to only include the cost of additional items eg merchandise, carnival entry fees, fob & locker fees, board storage fees etc. They do not need to have any Renewal or Joining fees on the price list as these will be entered in the Price List in Surfguard.

Members can then pay for additional items by:-

1. Logging in to their Members Area account and clicking the \$ at top right of screen to take them to the Payment Gateway to pay additional fees
2. The club can direct members to [pay.slsa.com.au](https://pay.slsa.com.au) and they will be redirected to the Payment Gateway.

### **2. Club using Online Joining & Renewals and NOT registered for SLSA Payment Gateway**

In Surfguard Clubs need to go to Menu > Maintenance > Payment Methods and untick "Enforce Credit Card Payments".

They should also go to Menu > Organisational Management > Bank Account Details and do the following: -

1. Make sure their bank account details are up to date.
2. Click Edit and tick "Allow Direct Deposits".
3. Make sure members prices and payment methods are listed on their website

### **3. Club NOT using Online Joining & Renewals (members submit paper forms) registered for SLSA Payment Gateway**

Your club will not have to create a Price List in Surfguard and will need to ensure the Payment Gateway Price List has all prices listed for Renewing, Joining and additional fees such as merchandise, carnival

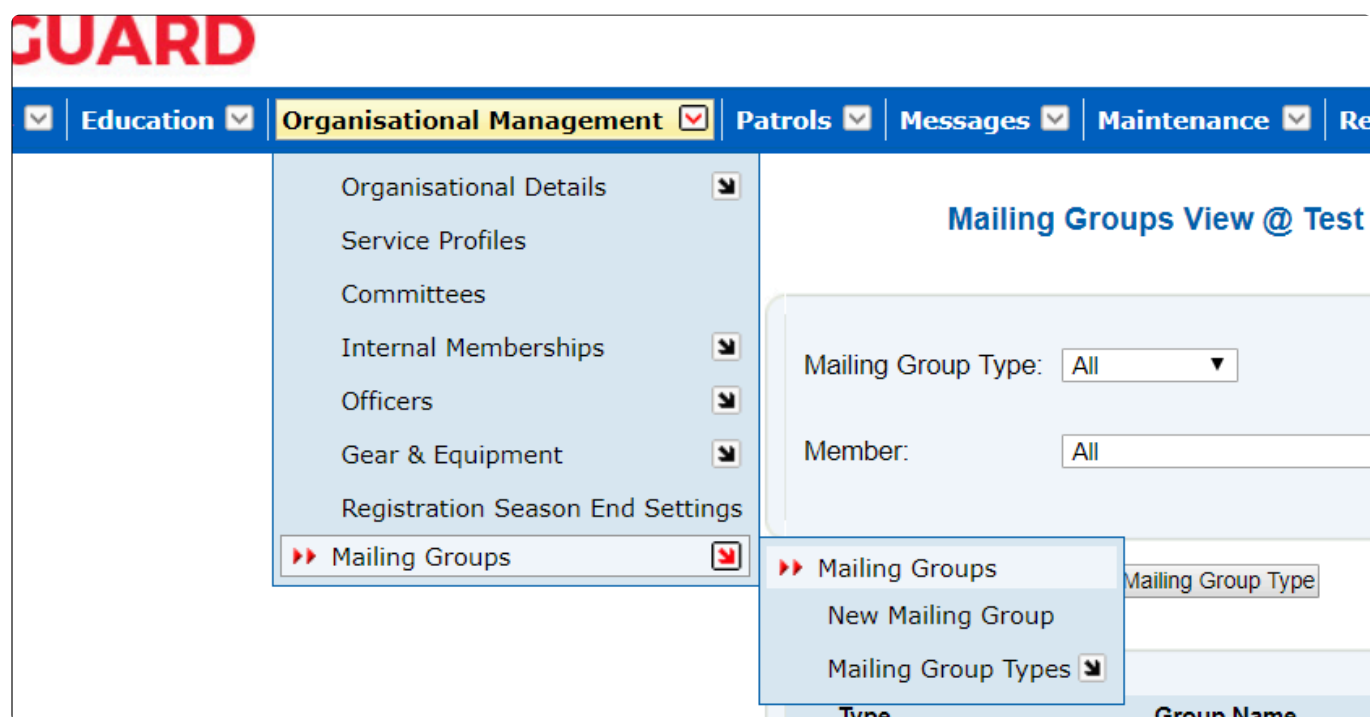
entry fees, fob & locker fees, board storage fees etc.

Members can then pay for additional items by:-

1. Logging in to their Members Area account and clicking the \$ at top right of screen to take them to the Payment Gateway to pay additional fees
2. The club can direct member to pay.slsa.com.au and they will be redirected to the Payment Gateway.

## 5.9 Mailing Groups

The 'Mailing Groups' sub-menu allows you to view various sets within the database that form specific mailing groups. The mailing groups are used to sort your members into family or other groups whereby you can easily create mailing labels or report on them.



The pre-set mailing group types include 'Board', 'Family', 'Committee' and Patrol Groups. Users can also create new mailing group types.

You can view all your mailing groups by clicking the drop-down arrow beside 'Mailing Groups' on the menu tab, then clicking 'Mailing Group' on the submenu. Select 'All' from the Mailing Group Type drop-down list to display a complete list.

### Mailing Groups View @ Test NSW Club

Mailing Group Type: All ▼

Member: All ▼

New Mailing Group
New Mailing Group Type
View Mailing Group Types

Type	Group Name	Actions	
Committee	<a href="#">abc</a>		
Committee	<a href="#">Awards</a>		
Committee	<a href="#">Education</a>		
Committee	<a href="#">Family_Group_1</a>		
Family	<a href="#">Boink</a>	<span style="border: 1px solid #ccc; padding: 2px 5px;">Edit</span>	<span style="border: 1px solid #ccc; padding: 2px 5px;">Delete</span>
Family	<a href="#">Suuuuuuuuuu</a>	<span style="border: 1px solid #ccc; padding: 2px 5px;">Edit</span>	<span style="border: 1px solid #ccc; padding: 2px 5px;">Delete</span>
Family	<a href="#">test</a>	<span style="border: 1px solid #ccc; padding: 2px 5px;">Edit</span>	<span style="border: 1px solid #ccc; padding: 2px 5px;">Delete</span>

## 5.9.1 New Mailing Group

You can add a new Mailing Group by clicking the 'New Mailing Group' button or sub-menu. You can select members from the Add/ Delete Mailing Group Members column by using the add (>) or remove (<) arrows. The mailing group must be given a name and a type of group selected. A primary member for the group can also be chosen.

As an example, if you were to enter a new mailing group for the Smith family. You would select Family as the group type, Smith Family as the name of the group and choose the mother or father of the Smith family as the Primary member. Then the rest of the Smith family can be selected using the Add/ delete members section on the right

Click 'Submit' to add the Mailing Group. You can then do this for all your families within the club to have a complete list of your families, the members in them and the primary mailing member. You will also notice that your committee's and patrol teams are automatically created as mailing groups. When a patrol team is changed, those changes will automatically reflect in the mailing group's area. For the purpose of a primary member, the Patrol Captain is selected.

**Mailing Group Add @ Test NSW Club**

**Mailing Group Type** Family ▼

**Mailing Group Name** Smith Family Test

**Primary Member** smith, bob (5675993) 23/04/1970 ▼

**Add/Delete Mailing Group Members**

bobbyyy, johnny (5729857) 13/11/2003

bombo gamoonix, cabbage (5692089) 16/04/1987

Bond, James (5689261) 12/12/1978

Bond, James (5711018) 18/05/1984

Boo, Becky (5841995) 05/10/1965

Boonda, Gammy (5689252) 12/12/1980

Bova, Catherine (5776536) 07/08/1964

Box, Brand (5524350) 14/11/1966

Bradman, Mark (4263834) 12/07/1956

Browne, Penelope (5844080) 15/01/1976

Bryce, Fannie (5630867) 21/09/1989

bumblebelly, bing bling (5641282) 03/03/1999

bumblebimby, boogerbang (5673210) 23/04/1980

Bunny, Benny (5651112) 01/10/1966

Bunny, Bugs (5742325) 05/10/1965

Bunny, Little (5651121) 01/01/2008

Burgess, George (5678616) 04/06/1999

Burgess, Sammy (5678614) 05/05/1983

chanel, coco (5691491) 29/07/1992

Chapman, Jack (5769122) 01/01/1995

Chiller, Kitty (5612902) 01/01/1950

>

<

test, ron (5638766) 19/11/1966

Test, Bec (5659679) 28/03/1969

SUBMIT
CLEAR
CANCEL

## 5.9.2 Mailing Group Types

SurfGuard contains a number of established mailing group types. These can be viewed by going to the 'Mailing Group Types' sub-menu,

The different types of mailing groups can be accessed by clicking the relevant hyperlink.

**Mailing Group Types View @ Test NSW Club**

**All Mailing Group Types**

Type	Actions
<a href="#">Board</a>	
<a href="#">Committee</a>	
<a href="#">Family</a>	
<a href="#">My specials</a>	<span style="border: 1px solid black; padding: 2px 10px;">Edit</span> <span style="border: 1px solid black; padding: 2px 10px;">Delete</span>
<a href="#">Patrol</a>	
<a href="#">Surfcom</a>	

New Mailing Group Type

View Mailing Groups

To add a new mailing group type, you can click the 'New Mailing Group Type' button on the Mailing

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### Group Types screen.

This screen allows you to name a new mailing group. After clicking the 'Submit' button, you will be asked to confirm that you want to create this new group. You will then be able to access this group and add members to it, as described above.

## 6. Patrols

### 6.1 Manage Patrol Teams

The Manage Patrol Teams sub-tab has four options:

- Manage Patrol Teams
- Add Patrol Team'
- Add Individual as Team
- Substitution Management

The first option 'Manage Patrol Teams' screen displays the Patrol Teams your club has created.

You can add, edit and view the members of each team by selecting the 'Members' link.

You can schedule a roster for the team by selecting the 'Roster' link.

Other actions are available for renaming or removing the patrol team by clicking the 'Edit' or 'Delete' link under the option.

#### Patrol Teams @ Test NSW Club

Team Name	Actions
Josh Test Team	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Members</a> <a href="#">Roster</a>
YR SEMS TEST	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Members</a> <a href="#">Roster</a>

[Add a Patrol Team](#) [Add Individual as Team](#)

#### 6.1.1 Adding Patrol Teams

By clicking the 'Add a Patrol Team' button on the Patrol Teams screen, you can set up a new Patrol Team.

Frist step will be to name the Patrol Team.



## Add a Patrol Team

A light blue rounded rectangular form. At the top, it says 'Team Name: \*' followed by a white text input field. Below the input field is a horizontal line. At the bottom of the form, there is a light blue bar containing three buttons: 'Save', 'Clear', and 'Cancel'.

Once you have created the Patrol Team then you will need to assign Members to that team.

## Add Patrol Team

**test test** has been successfully inserted.

[\[Assign Members to Team\]](#)

[\[Assign Dates/Times to Team\]](#)

[\[Back to Team List\]](#)

When adding new members to a Team, the list will show all active members registered for the current season by default. To view all active members regardless of season, you must check the box marked "Include Non-Financial Members"

When managing your patrol team members it is important to note that they may not hold the correct

award(s) to be eligible for the position. Surfguard will alert you if a member does not hold the correct awards by displaying a red 'No' beside the member. If they do hold the correct awards, Surfguard will display a green 'Yes'.

For a list of the award requirements, click **Details of Patrol Positions and Awards** at the bottom of the screen.

**Team Members - Josh Test Team @ Test NSW Club**

Position	Member	Contact Number	Award(s) Held?	Last Proficiency
Patrol Captain	<a href="#">Test Tester</a>	0400770993	No	-
Patrol Captain	<a href="#">Joshua Testerfield</a>	0435100268	No	-
Vice Captain	-	-	-	-
IRB Driver	-	-	-	-
IRB Crew	-	-	-	-
ART Operator	-	-	-	-
Patrol Application Captain	-	-	-	-
First Aid Officer	-	-	-	-
Bronze Member	<a href="#">Cocks, Rebecca</a>	0413457035	Yes	Bronze Medallion: 17/11/2018 Certificate II in Public Safety (Aquatic Rescue) (PUA21012): 28/10/2015 Certificate II in Public Safety (Aquatic Rescue) (PUA21004): 24/03/2010 Certificate II in Public Safety (Aquatic Rescue) (PUA21010): 11/12/2012
Radio Operator	-	-	-	-
Award Member	-	-	-	-
SRC	-	-	-	-
RWC Operator	-	-	-	-
Surfcom Supervisor	-	-	-	-
SurfCom Radio Operator	-	-	-	-
ORB Skipper	-	-	-	-
ORB Driver	-	-	-	-
ORB Crew	-	-	-	-
ORB Trainee	-	-	-	-

One or more Members fail to meet the awards criteria.

### Details of Patrol Positions and Awards

When viewing a patrol team you can also view the Patrol Requirements for your State by clicking the link below.

ORB Crew	-	-	-	-
ORB Trainee	-	-	-	-

One or more Members fail to meet the awards criteria.

[Edit Team Members](#)
[Delete All Team Members](#)
[View Team Roster](#)
[Back to Teams List](#)

[\[Details of Patrol Positions and Awards\]](#)



Each State has different Patrol Position Requirements if you have any queries I would suggest contacting your State Office directly.



### Patrol Position Requirements For NSW Clubs

Patrol Position	Position Type	Award Conditions
<b>Patrol Captain</b>	Lifesaving	Advanced Resuscitation Techniques [AID] AND Silver Medallion Beach Management AND Bronze Medallion OR Bronze Medallion AND Silver Medallion Beach Management AND Advanced Resuscitation Techniques Certificate OR Bronze Medallion AND Silver Medallion Beach Management AND Radio Operator Certificate OR Bronze Medallion AND Silver Medallion Beach Management AND Apply (Senior) First Aid OR Bronze Medallion AND Silver Medallion Beach Management AND Resuscitation Certificate OR Silver Medallion Beach Management AND Bronze Medallion AND Advanced Resuscitation Techniques Certificate OR Silver Medallion Beach Management AND Bronze Medallion OR Silver Medallion Beach Management AND Bronze Medallion AND Spinal Management OR Silver Medallion Beach Management Do Not Use
<b>Vice Captain</b>	Lifesaving	Silver Medallion Beach Management AND Bronze Medallion AND Advanced Resuscitation Techniques [AID] OR Silver Medallion Beach Management AND Bronze Medallion AND Radio Operator Certificate OR Silver Medallion Beach Management AND Bronze Medallion AND Resuscitation Certificate OR Silver Medallion Beach Management AND Bronze Medallion OR Silver Medallion Beach Management AND Bronze Medallion AND Apply (Senior) First Aid OR Silver Medallion Beach Management AND Bronze Medallion AND Spinal Management OR Silver Medallion Beach Management AND Bronze Medallion AND Advanced Resuscitation Techniques Certificate OR Silver Medallion Beach Management Do Not Use OR Silver Medallion Patrol Captain
<b>IRB Driver</b>	Lifesaving	Silver Medallion IRB Driver AND IRB Crew Certificate AND Bronze Medallion
<b>IRB Crew</b>	Lifesaving	IRB Crew Certificate AND Bronze Medallion
<b>ART Operator</b>	Lifesaving	Advanced Resuscitation Techniques [AID] OR Advanced Resuscitation Techniques Certificate OR Resuscitation [AID] OR Resuscitation Certificate

## 6.1.2 Adding A Patrol Roster to a Patrol Team

From the Patrol Menu – select ‘Manage Patrol Teams’.

The screen will display all your clubs Patrol Team Names.

### Patrol Teams @ Test NSW Club

Team Name	Actions
Start End Guide	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Members</a> <a href="#">Roster</a>
Test Patrol - SMBM	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Members</a> <a href="#">Roster</a>
Test Team A	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Members</a> <a href="#">Roster</a>
TEST TEAM FLOOD	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Members</a> <a href="#">Roster</a>
YR Test Patrol Team	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Members</a> <a href="#">Roster</a>

Add a Patrol Team

Add Individual as Team

To set up a roster for a patrol team click on the ‘ROSTER’ action button

- 1) Highlight the rostered date
- 2) Click across to the 'selected dates' box (you can list multiple dates)
- 3) Set the start and finish times for that patrol date
- 4) Hit the 'Add' button
- 5) Roster will appear right side of the screen

Continue to build the patrol teams roster.

## 6.1.3 Editing An Existing Patrol Team

From the Patrol Menu – select 'Manage Patrol Teams'.

### How to Change a Patrol Teams Name

Locate the Patrol Team that you need to edit.

Click on the 'EDIT' button



**Patrol Teams @ Test NSW Club**

Team Name	Actions
Start End Guide	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Members</a> <a href="#">Roster</a>
Test Patrol - SMBM	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Members</a> <a href="#">Roster</a>
Test Team A	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Members</a> <a href="#">Roster</a>
TEST TEAM FLOOD	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Members</a> <a href="#">Roster</a>
YR Test Patrol Team	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Members</a> <a href="#">Roster</a>

Remove existing name and retype.

### How to Add or Remove members from a Patrol Team

From the Patrol Menu – select 'Manage Patrol Teams'.

Click on the 'Members' action button for the Patrol team in questions

Scroll down to the bottom of the screen and click on 'Edit Team Members'.

Remove or add members accordingly.

Click the 'Save' button at bottom of screen

Click the 'Continue' button at the bottom of the screen to complete the task.

## 6.1.4 Substitute Management

Access: Patrols > Manage Patrol Teams > Substitute Management

Club officers/administrators can use this section to view all patrol substitution requests created by members via the Members Area and also create new Substitution requests on behalf of a member.

In the example below the club officer/administrators is requesting to display patrols for “All” Patrol Teams in “All” Patrol Positions where a “Substitution” has been requested between 22/06/2015 – 22/07/2015.

### Substitute Management @ Test NSW Club

**Retrieve Patrol Members:**

Patrol Team:

Patrol Position:

Patrols to Display:

First Name:

Last Name:

Date Range: From:  To:  (dd/mm/yyyy)

Continue

In the example below the club officer/administrator has been contacted by Yvette Test advising that she is not able to do her patrol on the 29th June 2015 and can the club create a substitution request.

### Substitute Management @ Test NSW Club

**Retrieve Patrol Members:**

Patrol Team:

Patrol Position:

Patrols to Display:

First Name:

Last Name:

Date Range: From:  To:  (dd/mm/yyyy)

Continue

The following screen displays and the club officer/administrator can either select “Add Substitute” if they know the name of a member who is able to do the sub or they can select “Need a Substitute” and this will then display in Members Area for all members to see.

## Substitute Management @ Test NSW Club

**Retrieve Patrol Members:**

Patrol Team:

Patrol Position:

Patrols to Display:

---

First Name:

Last Name:

Date Range: From:  To:  (dd/mm/yyyy)

---

Date	Time	Club	Patrol Team	Position	Status	Person Requiring sub	Person/Substitute	Action
29/6/2015	09:00 - 18:00 (09:00 hrs)	Test NSW Club	Team-Test	First Aid Officer	Rostered	Yvette Test		<input type="button" value="Add Substitute"/> <input type="button" value="Need a Substitute"/>

If the club officer/administrator selects the “Add Substitute” option the following screen will display and they will need to enter the details of the member who will do the sub.

**Retrieve Patrol Members:**

Member ID:

First Name:

Last Name:

Date of Birth: From:  To:  (dd/mm/yyyy)

☐ **Eligible Members only**

The screenshot below displays all Substitutions requested for the date range and the status of either “Substituted” or “Requesting Substitute”.

**Club Officers/Administrators** – can do the following for each status type:-

**Substituted** – Remove the substitute or Change the substitute.

**Requesting Substitute** – Add a substitute or Cancel the Substitution Request

## Substitute Management @ Test NSW Club

## Retrieve Patrol Members:

Patrol Team:

Patrol Position:

Patrols to Display:

First Name:

Last Name:

Date Range: From:  To:  (dd/mm/yyyy)

Continue

Date	Time	Club	Patrol Team	Position	Status	Person Requiring sub	Person/Substitute	Action	
22/6/2015	02:00 - 03:00 (01:00 hrs)	Test NSW Club	Warriors	Member	Substituted	Andrew Hutchinson	Yvette Rutherford	Change Substitute	Remove Substitute
27/6/2015	09:00 - 18:00 (09:00 hrs)	Test NSW Club	Team-Test	IRB Driver	Requesting Substitute	Andrew Hutchinson		Add Substitute	Cancel Substitution Request
22/6/2015	02:00 - 03:00 (01:00 hrs)	Test NSW Club	Warriors	Patrol Captain	Substituted	Cheryl White	Rahul David	Change Substitute	Remove Substitute
23/6/2015	09:00 - 18:00 (09:00 hrs)	Test NSW Club	Team-Test	Patrol Captain	Requesting Substitute	Yvette Rutherford		Add Substitute	Cancel Substitution Request
22/6/2015	02:00 - 03:00 (01:00 hrs)	Test NSW Club	Warriors	Award Member	Requesting Substitute	Yvette Test		Add Substitute	Cancel Substitution Request

## 6.2 Patrol Logs

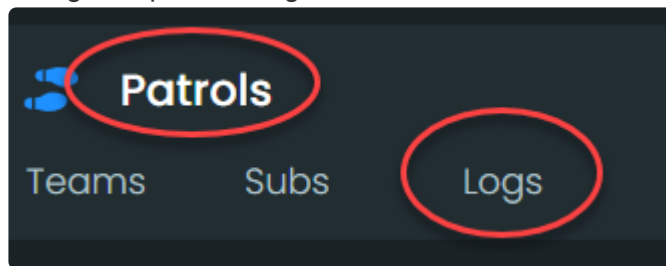


Depending on what State you are located in the Patrol Logs section will be managed differently. All States (except VIC & QLD) use the Operations App to manage patrols. The Patrol Log can be updated even if you are using the Operations App.

**All States (except VIC & QLD)** – Patrol Logs will automatically be Opened and prefilled with data from the Operations App

**VIC & QLD** – the log will need to be Created and then update with information in the Patrol Logbook

Using the quick links go to 'Patrols' and click on 'Logs'.



If you have entered all your patrol teams and rostered patrol times for each team, then an entire list of your patrol logs for your season should be available on the Patrol Log screen. Using the quick links go to 'Patrols' and click on 'Logs'.

Use the options and date range to filter your search or display logs from other seasons.

Patrol Logs View @ Urunga SLS

Log Status:

Patrol Date(From):

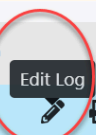




Patrol Date(To):

Patrol Name Contains:

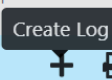

To enter information into a patrol log either create or edit the patrol log. Click the appropriate icon along side the log that you wish to action.

### Edit Patrol Log Icon

Log Status:  Patrol Date(From):  Patrol Date(To):  Patrol Name Contains:

<input type="checkbox"/>	Organisation	Date	Beach	Patrol Name	Start Time	Finish Time	Status	Days Open	Actions
<input type="checkbox"/>	Urunga SLSC	Sun 05/02/2023		TEAM 4 - HOWE	09:00	13:00	Open	4	    

### Open Patrol Log Icon

<input type="checkbox"/>	Organisation	Date	Beach	Patrol Name	Start Time	Finish Time	Status	Days Open	Actions
<input type="checkbox"/>	Urunga SLSC	Sun 12/02/2023		TEAM 5- RODGERS	09:00	13:00	Not Created	-	 

The Patrol Log will show all rostered members. To add additional members you can select from the list of members on the left and use the '>' arrow button.

The list automatically show all active members for the current season by default. To view all active members regardless of season, you must check the box marked "Include Non-Financial Members"

Each member must be assigned a patrol position example: BM Bronze Medallion holder, SRC – Surf Rescue Certificate Holder etc.

If a member had a substitute, find the subs name in the available member list, highlight the name and click on the 'Add Sub. Member' icon. This will move the substitutes name into the substitute column.

No.	Position	Remove Member	Add Member	Add Visiting Member	Member	Patrol Type	Remove Sub.	Add Sub. Member	Add Sub. Visitor	Substitute	Start Time	Fin
1	PC	<	Mbr >	Vis >	Howe, Garry	Rostered	<	Mbr >	Vis >		08	13
2	VC	<	Mbr >	Vis >	Jackson, Peter	Rostered	<	Mbr >	Vis >		08	13
3	VC	<	Mbr >	Vis >	Pavey, Warren	Substitute	<	Mbr >	Vis >	Churchill, Richard	08	13
4	IRBD	<	Mbr >	Vis >	Dieckmann, Alister	Rostered	<	Mbr >	Vis >		08	13
5	IRBD	<	Mbr >	Vis >	Simpson, Pete	Rostered	<	Mbr >	Vis >		08	13
6	IRBC	<	Mbr >	Vis >	Dieckmann, Alister	Rostered	<	Mbr >	Vis >		08	13
7	IRBC	<	Mbr >	Vis >	Howe, Garry	Rostered	<	Mbr >	Vis >		08	13
8	IRBC	<	Mbr >	Vis >	Kay, Damien	No-Show	<	Mbr >	Vis >		00	00
9	ART	<	Mbr >	Vis >			<	Mbr >	Vis >		00	00
10	FAO	<	Mbr >	Vis >	Dieckmann, Kylie	Rostered	<	Mbr >	Vis >		08	13
11	FAO	<	Mbr >	Vis >	Howe, Garry	Rostered	<	Mbr >	Vis >		08	13

Ensure that each rostered member has been correctly assigned a Patrol Type. If members are in the team roster they will automatically display with the Patrol Type of: Rostered. Other Patrol Types include:

Make-Up  
No-Show  
Not Rostered/Excused  
Other (Non Inclusive)  
Penalty  
**Rostered**  
Substitute  
Trainee  
Voluntary  
Water Safety  
Substitute No-Show  
Other Service

Ensure that each patrol member who attended the patrol has the correct start and finish times allocated to them.

To add a visitor to your patrol log from another club, select the 'Add Visitor (with update)'  
Upon clicking this link the system will ask you to save the log.

BodyBottomLeftCorner

.....

Get Visitor (with Update)

Fill in all the fields to search for the visitor.

### Search for Member

**State:** ==> Please Select <==

**Branch:** ==> Please Select <==

**Organisation:** ==> Please Select <==

---

**Enter either member ID or full name**

**Member ID:**

**First Name:**

**Last Name:**

---

Once the system has found the visitor their name will appear in the Visiting Member field. Select a vacant line in the patrol log and select the Position and then click on the 'Add Visiting Member' icon and their name will be added to the log.

The screenshot shows the patrol log interface. On the left is a list of members with a dropdown arrow. In the center is a table with columns for line number, position, and name. On the right is a 'Visiting Member' form with a text input field and a 'Get Visitor (with Update)' button. Red circles and numbers 1, 2, and 3 highlight key elements: 1 points to the 'Visiting Member' form, 2 points to a selected member 'M' in the patrol log, and 3 points to the 'Vis' column in the patrol log.

Line	Position	Name	Role
12	ATV		
13	M	Cooney, Nicole	Voluntary
14			
15			
16			
17			
18			

If you have more than 18 members involved in your log, use the 'Next Positions' (with update)' to move to the next page of members. Using both these options will save the patrol log.

Upon checking/updating your Patrol log click on the 'Continue' button located bottom of the screen to progress to the next page where you can check/edit/add your patrol stats.

Patrol logs are automatically closed at the completion. If you wish to leave your log open then uncheck the 'close' box.

Patrol Logs left 'Open' are automatically closed by the system after 21 days.

You can print a patrol log in PDF format straight from the patrol log page or alternatively from the patrol roster page.

The printable patrol log will be pre-filled with team member information, date and time information relating to the log.

The statistics and rescue activity fields are also printed in the PDF log.

## 6.2.1 Adding a Visitor

To add a visitor to a patrol log you need to edit the log you wish to add the visitor to and click on the Get Visitor button.

The screenshot shows the patrol log interface. On the left is a list of members with a dropdown arrow. In the center is a table with columns for line number, position, and name. On the right is a 'Visiting Member' form with a text input field and a 'Get Visitor (with Update)' button. A red arrow points to the 'Get Visitor (with Update)' button.

Line	Position	Name	Role
14			
15			
16			
17			
18			



The following screen will open up when you click on the Get Visitor button.

Simply locate the member by selecting the members state, branch and club.

Once this information is selected type in the member's name and click on the Find Member button.

### Adding the visiting member into the patrol log

Once the member has been located the visitor will be displayed under the Visiting Member section.

Click on the 'Vis' button to add the visitor into the patrol log.

## 6.2.2 Request to Reopen a Closed Patrol Log

1. If you wish to close a patrol log click on the Close icon
2. If you wish to re-open a patrol log that has a status of closed click on the 'Request Re-open' tab for the relevant patrol log.

Your request will be sent to your next highest authority ie: Branch or State Office

## 2. The Log Status will then display as 'Request Re-open'.

Organisation	Date	Beach	Patrol Name	Start Time	Finish Time	Status	Days Open	Actions
Hot Head	Sun 29/01/2023		Patrol 2	10:00	14:00	Open	6	[Edit] [Print] [Export] [Lock] [Refresh]
Hot Head	Sat 28/01/2023		Patrol 3	10:00	14:00	Closed	1	[View] [Print] [Export] [Lock] [Delete] [Refresh]
Hot Head	Thu 26/01/2023		patrol 5	10:00	16:00	Open	9	[Edit] [Print] [Export] [Lock] [Refresh]
Hot Head	Sun 22/01/2023		Patrol 4	10:00	16:00	Open	13	[Edit] [Print] [Export] [Lock] [Refresh]

\*Note: \* Once your request for a log to be re-opened has been processed the log will appear with the 'Open' Status.

Patrol logs that have been re-opened will only remain open for 7 days before the system automatically closes it again.

### 1. If you wish to have a patrol log deleted click on the 'Request Delete' tab

Request for a Patrol Log deletion will change the log status to read as 'Request Delete'

Note: A patrol log must be closed before you can request a delete.

Organisation	Date	Beach	Patrol Name	Start Time	Finish Time	Status	Days Open	Actions
Hot Head	Sun 29/01/2023		Patrol 2	10:00	14:00	Open	6	[Edit] [Print] [Export] [Lock] [Refresh]
Hot Head	Sat 28/01/2023		Patrol 3	10:00	14:00	Closed	1	[View] [Print] [Export] [Lock] [Delete] [Refresh]
Hot Head	Thu 26/01/2023		patrol 5	10:00	16:00	Open	9	[Edit] [Print] [Export] [Lock] [Refresh]
Hot Head	Sun 22/01/2023		Patrol 4	10:00	16:00	Open	13	[Edit] [Print] [Export] [Lock] [Refresh]

## 6.2.3 Not Able to Remove a Substitute From a Patrol Log

If a club is having issues removing a member from a patrol log where a member had requested a substitute and then showed up for the patrol

Please follow the steps in this section [Substitution Management](#) and scroll to the section at the bottom of screen, how to add and remove subs in Substitution Management screen

## 6.3 Unpatrolled Stats

A new listing can be added via the 'Add Unpatrolled Stats' button. This will open a new screen, on which you can enter details that pertaining to a certain date. This differs slightly from the Statistics that are entered for specific patrol logs as the unpatrolled stats are details of incidents in which a patrol was not

rostered for the time or date. Details include time and number of rescues performed, beach attendance, first aid required, tide information and weather conditions.

Weather Conditions									
Time	Weather	Wind Direction	Wind Strength (kts)	Wave Type	Wave Height (m)	No. of Rips	Sea Conditions	Water Temp (°C)	
Start	00 : 00								
Mid	00 : 00								
Finish	00 : 00								

<input type="checkbox"/> Nil	<input type="checkbox"/> Floating Debris	<b>Tide Times</b>	<b>Beach Closed - Reason</b>	<b>Hours</b>	<b>Beach Closed - Reason</b>	<b>Hours</b>
<input type="checkbox"/> Stormwater	<input type="checkbox"/> Oil Spills	High: 00 : 00	Dangerous Surf	<input type="checkbox"/>	Pollution	<input type="checkbox"/>
<input type="checkbox"/> Algae	<input type="checkbox"/> Sewage Pollution	Low: 00 : 00	Sharks	<input type="checkbox"/>	Storms	<input type="checkbox"/>
<input type="checkbox"/> Jellyfish/Stingers	<input type="checkbox"/> Other	High: 00 : 00	Marine Stingers	<input type="checkbox"/>	Algae	<input type="checkbox"/>
<input type="checkbox"/> Seaweed		Low: 00 : 00	Nets Removed	<input type="checkbox"/>	Other	<input type="checkbox"/>
			Crocodiles	<input type="checkbox"/>		

Beach Attendance (specify total number of people at each time increment)																							
	01:00	02:00	03:00	04:00	05:00	06:00	07:00	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:00	21:00	22:00	23:00
Swimmers																							
Swimmers Outside Flags																							
Craft																							
On Beach																							
Attendance Totals																							

## 6.5 Past Patrol Hours

Member patrol hours gained prior to the start of SurfGuard can be manually added by clubs in the Patrols section.

See screenshot below on how to access this section.

The screenshot shows the SURFGUARD web application interface. The top navigation bar includes 'ary', 'Members', 'Education', 'Organisational Management', 'Patrols', 'Messages', 'Maintenance', and 'Reports'. The 'Patrols' menu is expanded, showing options: 'Manage Patrol Teams', 'Patrol Logs', 'Unpatrolled Stats', 'Other Service Logs', 'Past Patrol Hours' (highlighted with a red arrow), 'Patrolling Sub-Membership Categories', and 'Quick Patrol Reports'. Below the menu, there is a section for 'List Active Members Only' with a 'Season' dropdown set to '2004/2005', a 'Member' dropdown, and a 'Patrol Hours' input field. To the right, there is a table titled '1900-2005 @ Test NSW Club' showing a list of members and their patrol hours.

Member ID	Member	Season	Hours
5738880	Accounte, Test	2000/2001	00:30
5832173	Accounts, Test	2004/2005	20:00
4779544	Aldrin, Buzz	2001/2002	01:00
4779544	Aldrin, Buzz	2000/2001	25:30
4779544	Aldrin, Buzz	1999/2000	01:00
4779544	Aldrin, Buzz	1993/1994	10:00

To add patrol hours to a member follow the steps below

1. Change the season date
2. This then changes the season listed.
3. Use the drop-down box to select the appropriate member
4. Add the patrol hours
5. Click the 'Add Hours' button

**Patrol Hours 1900-2005 @**

**Enter a Season to Filter the List by.**

Season: 2001/2002

List Active Members Only: ☐

Season: 2001/2002

Member: Recke, Benian 3) - Active

Patrol Hours: \*     (Format: HH:mm)

Member ID	Member	Season	Hours	Actions
4140798	Pa	2001/2002	60:30	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

## 6.6 Patrolling Membership Categories

The 'Patrolling Membership Categories' screen is used as a member type filter for the rest of the Patrol module. The member lists that appear in all the screens in the Patrol module (such as the 'Add Members to a Patrol Team' screen and the 'Patrol Log' screen) can be controlled by selecting only the membership categories you wish to be displayed.

By doing, this you can significantly reduce the number of members that appear in the lists to make a selection of members easier. (This will only delete the Membership Category from your club's list of membership categories of patrolling members.) For example, if you remove 'Junior Activity Member (5-13 years)' and 'Associate' from the list by using the 'delete' link, none of the members in these two membership categories will be displayed in the member lists on all your patrol screens. Add a membership category back into the list by selecting it from the drop-down list and click the 'Add' button

**Patrolling Sub-Membership Categories @ Test NSW Club**

**Sub-Membership Category:**

Probationary

Sub-Membership Category	Actions
Probationary	<a href="#">Delete</a>
Junior Activity Member (5-13 years)	<a href="#">Delete</a>
Cadet Member (13-15 years)	<a href="#">Delete</a>
Active (15-18 yrs)	<a href="#">Delete</a>
Active (18yrs and over)	<a href="#">Delete</a>
Award Member	<a href="#">Delete</a>
Reserve Active	<a href="#">Delete</a>
Long Service	<a href="#">Delete</a>
Past Active	<a href="#">Delete</a>
Life Member	<a href="#">Delete</a>
Honorary	<a href="#">Delete</a>

## 6.7 Patrol Position Abbreviations

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Each State office is responsible for setting up the list of Patrol Positions that are displayed in a patrol log.

Patrol positions are displayed using an abbreviation. Below is a list of all the abbreviations used by different states.

<b>Patrol Position</b>	<b>Abbreviation</b>	<b>Position Type</b>	<b>Available</b>
Beach Inspector	BI	Lifeguard	WA
Kiosk Attendant	KA	Lifeguard	NT
Kiosk Coordinator	KC	Lifeguard	NT
Kiosk Supervisor	KS	Lifeguard	NT
Lifeguard	LG	Lifeguard	ALL
Lifeguard Coordinator	LC	Lifeguard	NT
Pool Lifeguard	PL	Lifeguard	NT
Senior Lifeguard	SLG	Lifeguard	ALL
Supervisor	SPLG	Lifeguard	ALL
Trainee Lifeguard	TLG	Lifeguard	NT

ART Operator	ART	Lifesaving	ALL
ARTC Operator	ARTC	Lifesaving	WA
Award Member	AM	Lifesaving	ALL
Bronze Member	BM	Lifesaving	ALL
Defib Member	DEF	Lifesaving	QLD
Duty Officer	DO	Lifesaving	ALL
Emergency Operations Group	EOG	Lifesaving	SA
Endorsed Delegate	EDELG	Lifesaving	SA
First Aid Officer	FAO	Lifesaving	ALL
Gold Member	GM	Lifesaving	QLD
Helicopter Air Crew	HELAC	Lifesaving	QLD, WA
Helicopter Rescue Crew	HELRC	Lifesaving	QLD, WA
Helicopter Trainee	HELTC	Lifesaving	QLD
IRB Crew	IRBC	Lifesaving	ALL
IRB Driver	IRBD	Lifesaving	ALL
Jet Rescue Boat Crew	JRBC	Lifesaving	ALL
Jet Rescue Boat Driver	JRBD	Lifesaving	ALL
Jet Rescue Boat Trainee	JRBT	Lifesaving	ALL
Marine Rescue Coxswain	MR Cox	Lifesaving	TAS
Marine Rescue Crew	MR Crew	Lifesaving	TAS
Marine Rescue Rest Coxswain	MR Res Cox	Lifesaving	TAS
Nipper Rescue Certificate	Lifesaving	Lifesaving	WA
Observer	OBS	Lifesaving	QLD
Operations App User	APP	Lifesaving	SA, TAS
ORB Crew	ORBC	Lifesaving	ALL
ORB Driver	ORBD	Lifesaving	ALL
ORB Skipper	ORBS	Lifesaving	ALL
ORB Trainee	ORBT	Lifesaving	ALL

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Patrol Application Captain	PAC/APP	Lifesaving	ALL
Patrol Captain	PC	Lifesaving	ALL
Radio Operator	RO	Lifesaving	ALL
RIB Crew	RIBC	Lifesaving	NT
RIB Driver	RIBD	Lifesaving	NT
RPAS Operator	RPAS	Lifesaving	QLD
RWC	RWC	Lifesaving	ALL
SLS Flood Boat Crew	FBC	Lifesaving	TAS
SLS Flood Boat Operator	FBO	Lifesaving	TAS
SLS Flood Boat Rescue Tech	FBRT	Lifesaving	TAS
Spinal Management	Spinal	Lifesaving	NT
SRC	SRC	Lifesaving	ALL
SSV Member	SSV	Lifesaving	QLD
Surfcom Radio Operator	SRO	Lifesaving	NSW
Surfcom Shift Supervisor	SCSUP	Lifesaving	QLD
Surfcom Supervisor	SCS	Lifesaving	NSW
UAV (Drone) Operator	UAV	Lifesaving	NSW
UAV Pilot	UAVP	Lifesaving	TAS
VHR Radio Operator	VHFR	Lifesaving	TAS
Vice Captain	VC	Lifesaving	ALL
Visitor	VIS	Lifesaving	ALL
VMR Senior Crew	VMR S/Crew	Lifesaving	TAS

<b>PATROL POSITION</b>	<b>ABB</b>	<b>PATROL TYPE</b>	<b>AVAILABLE</b>
Age Manager	AM	Other Service	QLD, SA
ART Facilitator	ARTF	Other Service	WA
Assessor	ASS	Other Service	QLD, NT, SA
BBQ Duties	BBQ	Other Service	NSW, NT
Carnival Safety	Officer CSO	Other Service	SA
Coaches	COA	Other Service	QLD, NT, SA, WA
Committee/Office Bearer	COM	Other Service	QLD, SA
Education	EDU	Other Service	TAS
Facilitator	F	Other Service	NT
Flood Rescue	FR	Other Service	TAS
Peer Support Officer	PSO	Other Service	QLD
Probationary TAF	PTAF	Other Service	QLD
Regional Duty Officer	RDO	Other Service	TAS
Sport Official	OFF	Other Service	QLD, SA, TAS, NSW
Subject Matter Expert	SME	Other Service	QLD
TAF	TAF	Other Service	WA
TAF - ART	TAFART	Other Service	WA
TAF - Bronze Medallion	TAFBM	Other Service	WA
TAF - Drone	TAFD	Other Service	WA
TAF - first Aid	TAFFA	Other Service	WA
TAF - IRB	TAFIRB	Other Service	WA
TAF - Pain Management	TAFPM	Other Service	WA
TAF - RWC	TAFRWC	Other Service	WA
Trainer BM	TBM	Other Service	WA
Training Officer	TOC	Other Service	QLD, SA
Volunteer Club Activity	VCA	Other Service	QLD
Water Safety Hours	WSA	Other Service	QLD



<b>PATROL POSITION</b>	<b>ABB</b>	<b>PATROL TYPE</b>	<b>AVAILABLE</b>
Administrator	ADM	Other Service	VIC
Age Manager	AM	Other Service	QLD, SA, VIC
ART Facilitator	ARTF	Other Service	WA
Assessor	ASS	Other Service	QLD, NT, SA
BBQ Duties	BBQ	Other Service	NSW, NT
Carnival Safety	Officer CSO	Other Service	SA
Coaches	COA	Other Service	QLD, NT, SA, WA
Committee/Office Bearer	COM	Other Service	QLD, SA, VIC
Education	EDU	Other Service	TAS
Facilitator	F	Other Service	NT
Flood Rescue	FR	Other Service	TAS
General Club Volunteers	Gen Vol	Other Service	VIC
MSAR Volunteers	MSAR	Other Service	VIC
Peer Support Officer	PSO	Other Service	QLD
Probationary TAF	PTAF	Other Service	QLD
Regional Duty Officer	RDO	Other Service	TAS
Sport Official	OFF	Other Service	QLD, SA, TAS, NSW
Subject Matter Expert	SME	Other Service	QLD
TAF	TAF	Other Service	WA
TAF - ART	TAFART	Other Service	WA
TAF - Bronze Medallion	TAFBM	Other Service	WA
TAF - Drone	TAFD	Other Service	WA
TAF - first Aid	TAFFA	Other Service	WA
TAF - IRB	TAFIRB	Other Service	WA
TAF - Pain Management	TAFPM	Other Service	WA
TAF - RWC	TAFRWC	Other Service	WA
Trainer BM	TBM	Other Service	WA
Training Officer	TOC	Other Service	QLD, SA
Volunteer Club Activity	VCA	Other Service	QLD
Water Safety Hours	WSA	Other Service	QLD

## 6.8 Managing Patrols Webinar

Overview of Managing Patrols within Surfguard and associated systems, presented as a webinar on 7th August 2019.

## 6.9 Other Service Logs

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Other Service logs are used to record hours members contribute when engaged in other activities outside of patrol duties such as coaching, officiating, education etc.

### How to create an 'Other Service Log'

Select "Menu" and from the Patrol list select 'Other Service Logs > Click 'Add New Other Service Log'

1. Type in the Date that the Other Service Hours were performed
2. Highlight the members name
3. Click on the arrow in the 'Positions' column and select the appropriate abbreviated position ie: OFF for Officiating

**NOTE:** Each State creates their own Other Service hours positions. Contact your State Centre if you need further positions created.

4. Click on 'Add Member' to place the member into the Log
5. Enter the start and finish times

Click the 'ADD' button (bottom of screen) to save the entry.

## Other Service Log @ Test NSW Club

## Other Service Log Details:

Patrol Name:

Date: \*

Other Service

dd/mm/yyyy

## Retrieve Available Members:

Include Non-Financial Members: ☐

## Available Members

Anderson, Michael  
 Bakhsh, Roy  
 Bamboni, Traviso  
 Baum, Adam  
 Berry, Jade  
 blowie, joe  
 blue, Purple  
 Bock, Sarah  
 Boddan, Patrick  
 bondolo, dingleberry  
 Boo, Becky  
 Boonda-Test, Gammy  
 Bova, Catherine  
 Bradman, Mark  
 Bunny, Bugs  
 Bunny, Little  
 Burgess, George  
 Burgess, Sammy  
 Burns, Alpha  
 Butter, Peanut  
 Chanel, Coco  
 Christmas, Father  
 Cloud Dude, After Move  
 Cloud Dude, Before Move  
 Clovelly, Lola  
 Cocks, Belinda  
 Cooks, Rebecca

No.	Position	Remove Member	Add Member	Member	Start Time	Finish Time	Total Time
1		<	Mbr >		00 ▾ 00 ▾	00 ▾ 00 ▾	00:00
2		<	Mbr >		00 ▾ 00 ▾	00 ▾ 00 ▾	00:00
3		<	Mbr >		00 ▾ 00 ▾	00 ▾ 00 ▾	00:00
4		<	Mbr >		00 ▾ 00 ▾	00 ▾ 00 ▾	00:00
5		<	Mbr >		00 ▾ 00 ▾	00 ▾ 00 ▾	00:00
6		<	Mbr >		00 ▾ 00 ▾	00 ▾ 00 ▾	00:00
7		<	Mbr >		00 ▾ 00 ▾	00 ▾ 00 ▾	00:00
8		<	Mbr >		00 ▾ 00 ▾	00 ▾ 00 ▾	00:00
9		<	Mbr >		00 ▾ 00 ▾	00 ▾ 00 ▾	00:00
10		<	Mbr >		00 ▾ 00 ▾	00 ▾ 00 ▾	00:00
11		<	Mbr >		00 ▾ 00 ▾	00 ▾ 00 ▾	00:00
12		<	Mbr >		00 ▾ 00 ▾	00 ▾ 00 ▾	00:00
13		<	Mbr >		00 ▾ 00 ▾	00 ▾ 00 ▾	00:00
14		<	Mbr >		00 ▾ 00 ▾	00 ▾ 00 ▾	00:00
15		<	Mbr >		00 ▾ 00 ▾	00 ▾ 00 ▾	00:00
16		<	Mbr >		00 ▾ 00 ▾	00 ▾ 00 ▾	00:00
17		<	Mbr >		00 ▾ 00 ▾	00 ▾ 00 ▾	00:00
18		<	Mbr >		00 ▾ 00 ▾	00 ▾ 00 ▾	00:00

Next Positions (with Update) &gt;

<b>PATROL POSITION</b>	<b>ABB</b>	<b>PATROL TYPE</b>	<b>AVAILABLE</b>
Administrator	ADM	Other Service	VIC
Age Manager	AM	Other Service	QLD, SA, VIC
ART Facilitator	ARTF	Other Service	WA
Assessor	ASS	Other Service	QLD, NT, SA
BBQ Duties	BBQ	Other Service	NSW, NT
Carnival Safety	Officer CSO	Other Service	SA
Coaches	COA	Other Service	QLD, NT, SA, WA
Committee/Office Bearer	COM	Other Service	QLD, SA, VIC
Education	EDU	Other Service	TAS
Facilitator	F	Other Service	NT
Flood Rescue	FR	Other Service	TAS
General Club Volunteers	Gen Vol	Other Service	VIC
MSAR Volunteers	MSAR	Other Service	VIC
Peer Support Officer	PSO	Other Service	QLD
Probationary TAF	PTAF	Other Service	QLD
Regional Duty Officer	RDO	Other Service	TAS
Sport Official	OFF	Other Service	QLD, SA, TAS, NSW
Subject Matter Expert	SME	Other Service	QLD
TAF	TAF	Other Service	WA
TAF - ART	TAFART	Other Service	WA
TAF - Bronze Medallion	TAFBM	Other Service	WA
TAF - Drone	TAFD	Other Service	WA
TAF - first Aid	TAFFA	Other Service	WA
TAF - IRB	TAFIRB	Other Service	WA
TAF - Pain Management	TAFPM	Other Service	WA
TAF - RWC	TAFRWC	Other Service	WA
Trainer BM	TBM	Other Service	WA
Training Officer	TOC	Other Service	QLD, SA
Volunteer Club Activity	VCA	Other Service	QLD
Water Safety Hours	WSA	Other Service	QLD

### How to Retrieve Other Service Logs



From the Patrol Menu List – select ‘Other Service Logs’

Use the date filter to input the date range

Click on ‘retrieve other service logs’ and these will be displayed

These logs can be edited or deleted.

## Other Service Logs View @ Sunshine Beach

Patrol Dates From:   dd/mm/yyyy To:   dd/mm/yyyy[Retrieve Other Service Logs](#)[Add new Other Service Log](#)

Organisation	Date	Patrol Name	Actions	
Sunshine Beach	Sat 28/01/2023	Other Service	<a href="#">Edit Log</a>	<a href="#">Delete Log</a>
Sunshine Beach	Fri 27/01/2023	Other Service	<a href="#">Edit Log</a>	<a href="#">Delete Log</a>
Sunshine Beach	Sun 22/01/2023	Other Service	<a href="#">Edit Log</a>	<a href="#">Delete Log</a>
Sunshine Beach	Sat 21/01/2023	Other Service	<a href="#">Edit Log</a>	<a href="#">Delete Log</a>
Sunshine Beach	Fri 20/01/2023	Other Service	<a href="#">Edit Log</a>	<a href="#">Delete Log</a>
Sunshine Beach	Sat 26/11/2022	Other Service	<a href="#">Edit Log</a>	<a href="#">Delete Log</a>
Sunshine Beach	Sat 12/11/2022	Other Service	<a href="#">Edit Log</a>	<a href="#">Delete Log</a>
Sunshine Beach	Sat 05/11/2022	Other Service	<a href="#">Edit Log</a>	<a href="#">Delete Log</a>
Sunshine Beach	Sat 01/10/2022	Other Service	<a href="#">Edit Log</a>	<a href="#">Delete Log</a>

**Total: 9 other service log(s).**

## 7. Messages

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There are two forms of Messaging available in Surfguard.

1. Sending Messages whereby surfguard users can communicate with other surfguard users
2. Email or SEMS to communicate with your club members.

From the Menu page in the 'Messages' section, you can choose between:

1. Messages – view incoming messages from other surfguard users.
2. Create Message – a communication tool to contact other Surfguard Users
2. Email/SMS Members – a communication tool to contact your Club/Organisation Members

### Messages

Messages

Create Message

Email/SMS Members

## 7.1 Messages

---

Messaging is used by Administrators of Entities (Clubs, Branches, or States) to send Surfguard related messages using the system itself.

This messaging system may only be used infrequently and is not intended to replace normal email.

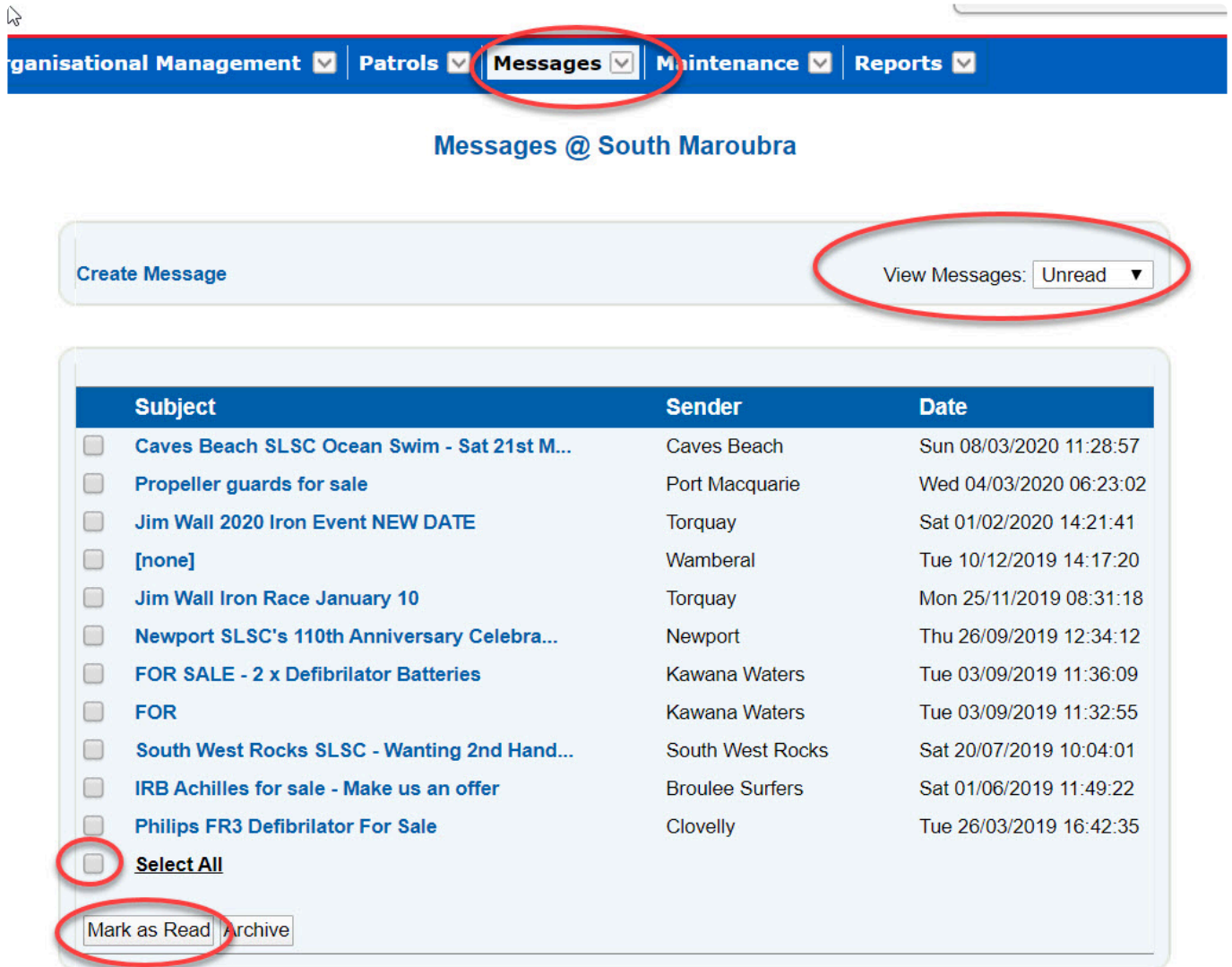
There are two sub-menu options under 'Messages'.

1. Messages
2. Create Messages.

### Messages

The default Messages screen lists all unread messages; however, you can sort your messages using a number of options, including read, sent, draft, or archived listed in the View Message drop down box.

Once you have read a message



organisational Management ▼ | Patrols ▼ | **Messages ▼** | Maintenance ▼ | Reports ▼

### Messages @ South Maroubra

Create Message

View Messages: Unread ▼

	Subject	Sender	Date
<input type="checkbox"/>	Caves Beach SLSC Ocean Swim - Sat 21st M...	Caves Beach	Sun 08/03/2020 11:28:57
<input type="checkbox"/>	Propeller guards for sale	Port Macquarie	Wed 04/03/2020 06:23:02
<input type="checkbox"/>	Jim Wall 2020 Iron Event NEW DATE	Torquay	Sat 01/02/2020 14:21:41
<input type="checkbox"/>	[none]	Wamberal	Tue 10/12/2019 14:17:20
<input type="checkbox"/>	Jim Wall Iron Race January 10	Torquay	Mon 25/11/2019 08:31:18
<input type="checkbox"/>	Newport SLSC's 110th Anniversary Celebra...	Newport	Thu 26/09/2019 12:34:12
<input type="checkbox"/>	FOR SALE - 2 x Defibrilator Batteries	Kawana Waters	Tue 03/09/2019 11:36:09
<input type="checkbox"/>	FOR	Kawana Waters	Tue 03/09/2019 11:32:55
<input type="checkbox"/>	South West Rocks SLSC - Wanting 2nd Hand...	South West Rocks	Sat 20/07/2019 10:04:01
<input type="checkbox"/>	IRB Achilles for sale - Make us an offer	Broulee Surfers	Sat 01/06/2019 11:49:22
<input type="checkbox"/>	Philips FR3 Defibrilator For Sale	Clovelly	Tue 26/03/2019 16:42:35
<input type="checkbox"/>	<b>Select All</b>		

Mark as Read Archive

### Create messages

Click the 'Create Message' link from the menu page.

The screen that is displayed allows you to select the message recipients from the available list. You can do this by using the add (>) or remove (<) arrows. Once you have composed your message you have the option of sending it or saving it as a draft to be sent at a later time.



**Messages @ Test NSW Club**

**New Message**

**National:**

**State:**

**Branch:**

**Organisation:**

**Select Recipient/s:**


Bondi  
Burning Palms  
Coogee (NSW)  
Elouera  
Garie  
North Bondi  
South Maroubra  
Surf Rescue 30 Sydney  
SYD - RWC Group  
Wanda

**Recipient List**

Sydney Branch  
Bondi  
Bronte  
Burning Palms  
Clovelly  
Coogee (NSW)  
Cronulla  
Elouera  
Era  
Garie

**Subject:**

**Message:**



[\[ Back to Messages \]](#)

## View Messages

To view a message, click the message subject. The message will be displayed with the details of the message, including who sent it and who it was sent to.

To view all recipients of the message, click the 'Show Recipients' link.

A message can be forwarded as an email by clicking the "Forward as email" link. This will open the message in your email application with the subject and message content already filled out.





## 7.2 Email/SMS

The email/SMS function allows for organisations to extract a list of members and then email/SMS a message to selected people on the list.

This will allow for reminders, information and other updates to be sent directly to people from SurfGuard.

Both the email and SMS messages are sent one way only — replies cannot be received.

For a person to receive email and SMS messages, they must have a valid email address and/or mobile phone number entered in their SurfGuard membership details.

If a person does not wish to receive Email/SMS communication then a checkbox, Do not send SMS and/or Do not Send Email, must be ticked in the persons details in SurfGuard. The check boxes are located at the bottom left-hand side of the members details screen under Other Details.

### IMPORTANT NOTE FOR SENDING SMS MESSAGES

All clubs need to abide by the SMS usage conditions in that the sending of SMS messages it ONLY FOR time-critical messages.

Sending excessive SMS messages that are not time-critical may result in monthly “sending limits” being imposed on your club.

## 7.2.1 Sending an Email or SMS Message

### To send an Email or SMS Message

1. Select whether an email or SMS is to be sent by selecting Output Format from the dropdown list (Email is the default).

2. Use the filters to select the group of people you wish to email or SMS.
3. Ensure you select the appropriate filters so you only email or SMS the group of people you want.
4. Click Display Report when all appropriate fields have been selected. A new screen will open with the results.
5. Enter the message details such as title and message.
6. Email Attachments: To attach a file to an email, click the 'Add Attachment' button and then click the Browse button and navigate to the file you wish to attach.
7. To add further attachments, click the 'Add Attachments' button again. To remove an attachment click on the Remove button.
8. Agree to the declaration in order to send an email or SMS.

***The SMS Text messaging service is for sending time-critical messages for training, patrolling or nipper activities. The sending of text messaging for advertising social events is not authorised and by clicking OK you are confirming that this message meets these requirements. Sending excessive SMS messages that are not time-critical may result in 'sending limits' being imposed on your club***

All people searched for are returned whether they have a valid email/mobile number or not, and including those who may have opted not to receive email/SMS communication. This allows you to see those who can be sent a message and those who will not be

1. Select people from the list by ticking their box.
2. When all message recipients are selected, click Send.

Note: You can only attach files of the following types: csv, images, pdf, power point, rich text, spreadsheets, text, word documents, zip/gzip. Total Max File Size (sum of all file sizes) = 1.5Mb%

Any Email/ SMS that gets sent to a member under 18yrs of age will also be sent to their Parent/ Guardian. If Parent/Guardian doesn't want to get this, then they can tick the 'do not send' box in the Parent/Guardian fields when logged in to Members Area account of the child who is under 18yrs of age or ask their club to update the details in the child's membership profile in Surfguard.

Note: NOTE: Note Emails/SMS will only be sent to Guardian where the Guardian Details have been updated in Surfguard

The SMS function allows for a maximum of 160 characters per message.

A maximum of 160 characters per SMS message is allowed for Latin/ English Character Set encoding (i.e., standard English).

A maximum of 30 characters per message is allowed for Universal Character Set (for Non-English characters) encoding.

SMS are for emergencies and we recommend using the email function if not your communication is not time sensitive.

## Email/SMS Members @ Test NSW Club

**Message Type:** Communicate With Members ▼ Advanced Search

**Output Format:** Email ▼

**Enter the following fields to narrow your search:**

**Member ID:**

**First Name:**

**Last Name - From:**  **To:**

**Gender:** ☒ All ☐ Male ☐ Female ☐ Indeterminate



**Registered Season:**  eg. 2012 = registered season 2012/2013

Display Report Clear

*To filter by different fields simply hit the 'Advanced Search' button*

**Message:**

Message Title: \*

Font Size... ▼ **B** **I** **U**  

Test

Message: \*

**Attachments:**

Choose File Form 75.pdf Remove (Max 1.5Mb per file)

Add Attachment

Total Max File Size (sum of all file sizes): 1.5 Mb

Allowed Attachments: csv, images, pdf, power point, rich text, spreadsheets, text, word documents, zip/gzip

**Declaration:\***

☒ I will only send messages to people who have consented to receive them and I am complying with all SLSA policies and with all relevant legislation.

*Once you have typed your message & attached any documents you will need to check the declaration to send your message*

When creating your email communication it can be helpful to click on the 'advanced search' button which will present a number of filtering options:

Filter by Mailing Group Fields

Filter by Officer Fields

Filter by Member Fields

Filter by Transaction Fields

Filter by Pending Member Request Fields

Filter by Licence Fields

Filter by Award Fields

Filter by Assessment Fields

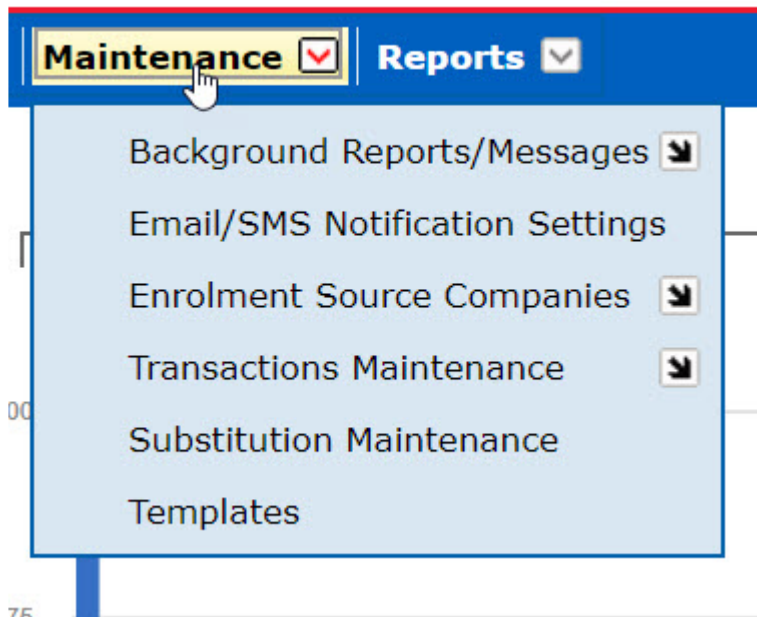
Filter by Assessment Eligibility Fields

Filter by Patrol Team Fields

Filter by Patrol Log Fields

## 8. Maintenance

Under the Maintenance tab, Club level users can access the sub-menus shown below:



### 8.1 Background Reports/Messages

#### Scheduled Background Reports

Users can set up a series of scheduled reports specifically for your Club or Organisation that will be automatically created and emailed to a user.

This screen will display any such scheduled reports set up by your club.

Click on the View, Edit or Delete Option buttons to make changes to a scheduled report.

Once a report has been scheduled, the report type and selection criteria cannot be changed. Only the parameters that affect the actual scheduling of the report can be changed (such as who will receive it, when it is run and how often, etc.)

**Scheduled Background Reports/Messages View @ Test NSW Club**

Report Type:   
Output Format:   
Scheduled Run Date - From:  (dd/mm/yyyy)

Report:   
Enabled:   
Scheduled Run Date - To:  (dd/mm/yyyy)

Report Type	Report Name	Output Format	Recurring Type	Recurring Interval	Scheduled Date/Time	Enabled	No. of Email/SMS Recipients	Options
Custom Reports	Test Report	CSV Style (Excel Format)	Non-recurring		Wed 29/06/2016 13:15:00	No	1	<input type="button" value="View"/>

#### Schedule Reports Can Only Be Viewed by The Surfguard User Who Creates the Report

The email sent to the User will contain a link to the report. If the link is shared with other Surfguard Users, they will get the following message when they click the link.

Clicking "Display Report" in General or Custom Reports Displays a Pop-Up

## Messages

Through this screen Users are able to view all their emails and/or SEMS sent to their members.

To view, for example, all Email Messages sent by your club surfguard users following these instructions:

1. From the Maintenance Menu Tab – select Background Report/Messages – Scheduled Background Report/Messages
2. Report Type: Messages
3. Output Format to: Email (or is you wish to see SMS message sent then choose this)
4. Report to: Communicate with Members
5. Enabled to: All
6. Click the GO button

**Scheduled Background Reports/Messages View @ South Maroubra**

Report Type:  ▼

Output Format:  ▼

Scheduled Run Date - From:  (dd/mm/yyyy)

Report:  ▼

Enabled:  ▼

Scheduled Run Date - To:  (dd/mm/yyyy)

You can click on the column header ie: **Scheduled Date/Time** to bring the most recent date to the top of the report.

The screen will list all Email communication messages sent from your club.

If you click on the **View** option button this will display the details of the message emailed, who sent the email and so forth.

## 8.2 Email/SMS Notification Settings

Email notifications allow clubs to be sent notification emails when certain events take place or areas of Surfguard are updated.

Anything that has been changed in Surfguard (such as status updates and new items requiring action) within the modules available will be sent in an email. This is a great way for Officers of your Organisation to be alerted of re-opened patrol logs, approved assessments, transfers requiring action, members licenses expiring etc.

Simply go to the Email/SMS Notification Settings from the Maintenance menu drop down box. Clicking on the 'edit' button, clubs can add a number of email address to receive email notifications from surfguard.

When adding more than one email address use a comma with no space ie:

test@slsa.asn.au,beach@slsa.asn.au,surf@slsa.asn.au

**Email/SMS Notification Settings @ Test NSW Club**

Email Notification Settings

Notifications	Subscribed	Email Address(es)
Assessments	[x]	test@slsa.asn.au, surf@slsa.asn.au
Expiring Member Licenses	[x]	test@slsa.asn.au
Expiring Member Protections	[x]	test@slsa.asn.au
Messages	[ ]	
New Memberships - Linked Systems	[x]	beach@slsa.asn.au, surf@slsa.asn.au
Patrol Log Requests	[x]	test@slsa.asn.au
Pending Member Requests	[x]	beach@slsa.asn.au
Transfers	[x]	surf@slsa.asn.au

[Edit](#)

## 8.3 Enrolment Source Companies

Source Companies are those entities that describe where a member or course registrant comes from. To update source company information, select the 'Maintain Source Companies' option from the menu. Users are given two choices:

1. Maintain Source Companies
2. Create New Source Company

The screenshot shows a web application interface. At the top, there are two main menu items: 'Maintenance' (with a dropdown arrow) and 'Reports' (with a dropdown arrow). The 'Maintenance' menu is expanded, showing a list of options: 'Background Reports/Messages', 'Email/SMS Notification Settings', 'Enrolment Source Companies' (which is highlighted with a mouse cursor), 'Transactions Maintenance', 'Substitution Maintenance', and 'Templates'. To the right of the 'Enrolment Source Companies' option, a sub-menu is displayed with two options: 'Maintain Source Companies' and 'Create New Source Company'.

Maintain Source Companies lists all Source Companies created in the system. You can only delete Source Companies that are not in use by other users.

In the Add Source Company space fill in the compulsory fields to create a new Source Company

## 8.4 Transactions Maintenance

Transaction types can be added to the already default available list.

To add new transaction types, select “New Transaction Type” while in the transaction maintenance screen.

It’s important to remember that you cannot delete a transaction type once members have transactions linked to it.

Patrols ▾ | Messages ▾ | Maintenance ▾ | Reports ▾

### View Transaction Types @ South Maroubra

Transaction Type Name	Options
Presentation Night 2019	<button>Edit</button> <button>Delete</button>
60th Anniversary Ball Tickets	<button>Edit</button> <button>Delete</button>
Carnival entry fee	
Club key	
Course fee	
Donation	
Function	
Gym fee	
Invoice	
Joining Fee	
Levy	
Locker key	
Membership fee	
Merchandise	
Non fee paying member	
Other	
Special Event	
Training material/manuals	

New Transaction Type



## 8.5 Substitution Maintenance

It is within the Maintenance – Substitution Maintenance screen that users/Clubs can set rules/timelines that apply to how notifications are sent and updated to users of the patrol sub functions in the Members Area.

By clicking on the Edit option, Users/Clubs can adjust the time period (value) or who in a patrol receives substitution notifications.

Substitution Maintenance @ South Maroubra			
Substitution Parameter	Description	Value	Options
Future patrols - Hours prior	Defines the period prior to the patrol starting where a substitute request can no longer be created.	72	<a href="#">Edit</a>
Deselect Substitution - Hours Prior	Defines the period prior to the patrol starting where a confirmed substitute can no longer cancel the patrol substitution.	72	<a href="#">Edit</a>
Patrol Not Taken - Hours Prior	Defines the period prior to the patrol starting whereby all unaccepted substitution requests will be cancelled and an email sent to notify the member who created the request.	72	<a href="#">Edit</a>
Patrol Not Taken - Notification	Enable or Disable the email notification that is sent when a substitution request has not been accepted by anyone.	Yes	<a href="#">Edit</a>
Patrol Taken - Notification	Enable or Disable the email notification that is sent when a substitution request is confirmed.	Yes	<a href="#">Edit</a>
Patrol Taken - Positions Notified	Defines the Positions on the patrol team that will be notified when a substitution request is confirmed.	Patrol Captain Vice Captain	<a href="#">Edit</a>
Upcoming Patrol - Hours Prior	Defines the period prior to the patrol starting where nominated positions are emailed a list of Patrol Members for the upcoming patrol.	72	<a href="#">Edit</a>
Upcoming Patrol - Positions Notified	Defines the Positions on the patrol team that will be emailed a list of Patrol Members for the upcoming patrol.	Patrol Captain	<a href="#">Edit</a>
Upcoming Patrols - Email/SMS - Days	Defines the number of days prior to the patrol starting where the rostered patrol will appear in the 'Filter by Patrol Team Fields' area within 'Email/SMS members'.	7	<a href="#">Edit</a>
Eligible Members Only	Defines whether club administrators are able to select from eligible members only while using Surfguard to manage substitutions.	No	<a href="#">Edit</a>

### Example:

#### Patrol Taken Notification

If the Patrol Taken Notification value is enabled (Value is YES) then when a person accepts a patrol substitution (within the Members Area – patrol section) the patrolling member applying for the sub will receive an email notification that another club member is doing the sub for them.

## 8.6 Templates

There are two default templates in Surfguard: **Membership Details and Membership Renewal Form** that are accessible for viewing or editing via the Maintenance-Templates screen.

When club officers use the option of emailing out either Membership Details or Membership Renewal Forms they can choose to include the appropriate Template cover letter.

To email Membership Renewal Forms from Surfguard including the template Cover Letter: Go to Reports

> General Reports > Member Reports and make the following selections.

Report Type: Membership Renewal Form

Output Format: PDF

Click 'Advanced Search' button and make the following selections

Renewal Season: Select 2020/21

Status: Active

Registered Season: 2019

Email to Members: tick the box and the Declaration box that then appears

Print Cover Letter: Yes

**\*\*Note:** \* When you select Yes to Print Cover Letter template option will appear. You can make changes to the template on the screen but any changes made will not be saved.

To keep changes made to a template then use the Maintenance/ Templates menu for full edit functionality and to save the new format of the template.\*

Print Declaration: Yes

Print Membership Details: No

Display Report Here box

Surfguard will then produce a report advising which members have been emailed their pre-filled membership forms and provide you with pre-filled membership forms for those without email addresses in Surfguard.

Note: If electronically sending or printing forms for all your members, it is important to break the output up into a number of groups based on age/ name/ Membership category.

Because this report can be large, printing all members at once may fail. We suggest that you print one output for all members with last names starting from 'a' to 'c', then another output of members from 'd' to 'f', etc.

## 8.7 Payment Methods

---

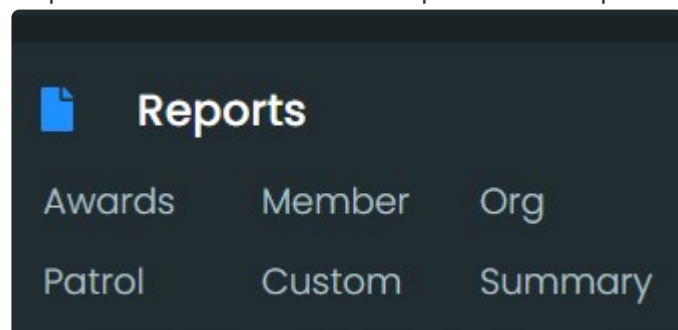
Tick the checkbox: Enforce Credit Card Payment within Members Area/Join

If you wish to enforce that your members must pay using a credit card

## 9. Reports

### 9.1 General Reports

Reports can be access via the quick links 'Report' section located left hand side of screen



or click on the Menu link – Reports

#### Reports

Audits

Assessment, Award & License Reports

Member Reports

Organisational Management Reports

Patrol Reports

Transfer Reports

Custom Reports

New Custom Report

Gear & Equipment Custom Reports

New Gear & Equipment Custom Report

Award Comparison Report

TAF Awards Report

#### General Reports: Overview

Report Category	Report Name	Description
-----------------	-------------	-------------

Audit	Audit	Reports on audit trail and summary of changes made to Patrol logs and Member DOB's over a set period of time.
Assessment, Awards and License	Assessments Eligibility	Description Reports on who in your organisation is eligible to commence training for a specific award
	Assessments	Provides a report on who in your organisation sat for an assessment over a specific period of time. Includes awards and proficiencies
	Assessors	Provides a report on who in your organisation acted in the capacity of an Assessor over a specific period of time for a specific award
	Assessor Activity History	A report that lists your organisations Assessors Activity History
	Awards History	Gives you a report on members or an individual member within your organisation on their award history. This report can be filtered by award, date, membership type, proficiency, registered season & person
	Current Awards	Report that outputs a list of members that have a specific award. Report can be filtered by Award, person, registered season, award date
	Reference: Awards	A report that details the criteria for a specific award including award pre-requisite conditions for candidates, assessor and trainers.
	Reference: Licenses	A report that details what licenses are required for a specific award.
	Totals By Assessment Date	Gives a break down, by month and by award, of your organisations total numbers for Assessments and their subsequent award status.
	Trainers	Provides a report on who in your organisation acted in the capacity of a Trainer over a specific period of time for a specific award
	Trainers Activity History	A report that lists your organisations trainers Activity History
Member	Competition Age Category	Lists members current competition age category within a specific registered season. Report can be filtered by membership category, gender, age
	Contact Details	Provides a comprehensive report on members contact details which can be filtered by groups, officer, gender, registered season, registration date and membership type.
	Email Lists	A list of members email addresses
	Family Groups	This report is for Clubs to determine the Number of Family Groups that have been created within the Club, Members who have a Family Group, Primary and Standard Members of each Family Group and Contact Information.

	Mailing Labels – Members	Provides the function to grab member information to create mailing labels. System is set up to use Avery L7160 labels or you can output information into excel format to create your own labels
	Members Portal Accounts	This report is for Clubs to determine if Members do or do not have a Members Portal Account. Report also details members Account Usernames and when Portal accounts were created and last used.
	Membership Details	A report that details a members details including a list of awards, contact information, emergency contact details, ID verification, Member Protection status
	Membership History	Provides a list of dates for when a members membership record was updated including registered seasons, membership categories and competition rights.
	Membership Protection Details	This report is for Clubs to determine who is up to date with their Member Protection and who is required to update their Members Protections (WWCC).
	Membership Renewal Form	This report is for Clubs to print out or email prefilled Membership Renewal Forms to Members.
	Nipper Attendance Sheet Template	A list of members, that can be determined by competition age category, membership type, registered season, gender. Can be exported into excel format to be used as a nipper attendance sheet.
	Pending Member Requests	Provides a club with a list of all transactions that have passed through the pending member request function. Report can be filtered by Pending Member Request status i.e: completed, pending, rejected for a specific date period.
	Reference: Occupations	A list of members occupations
	Transactions	A list of members transactions for a specific period of time. Can be filtered by a particular transaction type, date period or payment method
Organisational Management Reports	Gear and Equipment	Lists all (or selected) organisation equipment, detailing equipment information such as make, date of purchase, gear inspection dates, registration numbers.
	Gear and Equipment Totals	An equipment list containing total numbers of inventory for each type of equipment
	Officers Club/ Organisation	List of club officers that can be filtered by date, registered season, position, person. List also contains Officers contact information
	Organisation	Details an organisations address, contact information, GPS location, bank

	details	account information, RTO info (if applicable),
	SMS totals	Provides a total of SMS sent to members over a specific date period or registered season
	Service Profiles	A report that details when an organisation is providing a lifesaving service including, dates, days & times and a description on where an organisation provides such services ie: location
	Users	This report is for Clubs to determine who has Active access to Surfguard. You can also check who has previously had access and is now inactive.
Patrol Reports	Member Patrol History	This report will provide a list of a members Full Patrolling History, Note: Surfguard only begun in 2004 and any Patrol Hours prior to this date will not display in this report unless they have been manually added by an organisation. Patrol History prior to surfguard will need to be obtain from previous Annual Report and Patrol Logs.
	Member Patrol Summary	Can provide a report on an individual, whole patrol or all members total patrol hours for a particular season/s broken down into Lifesaving and/or competition seasons
	Patrol Attendance: 100%	Provides a list of patrolling members who have completed 100% of their own rostered patrols during a season
	Patrol Deficit Hours	A report that details patrolling members who are in arrears of their rostered patrolling duties for a specified period of time or season
	Patrol Log/ Service Profile Comparison	Details all patrol logs (in weekly increments) and their current status in relation to logs being completed.
	Patrol Rosters	A report that can list all patrols or individual patrols team members and their seasons roster (including patrol teams contact details optional)
	Patrol Service	Details an organisations patrol service history including Beach Attendance and Activity, Prevention Actions, First Aids with last year comparisons. Report can be filtered using monthly or weekly breakdowns
	Patrol Team Member Qualifications	Lists members in a rostered team together with their patrol position and award qualification status, contact information is optional
	Patrol Team Member Qualifications and Roster	A report by Patrol that lists all patrolling team members, their patrol position and their award and proficiency details, (Contact email and mobile information optional) and their rostered patrol dates and start/finish times.
	Patrol Type Hours	Details patrolling members patrol service for a specific date/season period including a breakdown of each of their rostered patrols with the members start and finish time, patrol type ie: rostered, no shows, arranged substitutes

		and hours
	Patrolled and/or Unpatrolled Stats	A full report of all patrolling stats including # of rescues, beach attendance, first aids performed, patrol weather conditions, preventative actions
	Patrolled and/or Unpatrolled Stats – Attendances	Extracts information from the Patrol logs to display total beach attendance numbers
	Patrolled and/or Unpatrolled Stats – First Aid	Reports total number of first aids performed over a specific period of time (includes day by day breakdown)
	Patrolled and/or Unpatrolled Stats – First Aid Analysis	Specific report on any first aid incidents involving ambulance, Methoxyflurane usage
	Patrolled and/or Unpatrolled Stats – Preventions	Extracts information from patrol logs to display each patrolling days Prevention Action statistics with an accumulative total
	Patrolled and/or Unpatrolled Stats – Rescues	Extracts information from patrol logs to display total number of rescues with a breakdown for specific date range & rescue periods.
	Patrolled and/or Unpatrolled Stats Comparison	An organisations patrol stats with comparison flexibility by month, years for a number of patrolling data including first aid, attendance, Preventatives, rescue types
	Substitution Statistics	Lists all patrolling members together with any substitutions that have been performed and make up. Ie: patrols given upo and patrols accepted
	Total Member Patrol Hours	A detailed report of all patrolling members total patrol hours performed in a specific season including a breakdown for rostered hours, patrol rostered hours completed, substitute, volunteer, water safety. (report can be filtered for individuals a registered season, membership type
	Total Team	A report that gives a patrol by patrol breakdown of each teams total

	Patrol Hours	patrolling hours and the make up of these hours.
Transfer Reports	Transferred Out Members	Members that transferred out of the organisation
	Transfers	A report that details all transfers, both in and out of an organisation. Includes transfer type, winning/ losing club and the transfer approval process
	Transfers History	Breaks down per member the transfer history, transfer type and status for a given period/season

## Report Scheduling

To run reports at a specified time or on a regular basis a feature is available that allows scheduling of both standard reports and custom reports. Reports can either be run once at a scheduled time or can be reoccurring.

The results of each scheduled report can be emailed and/or sent via Surfguard messaging to you rather than having to export/view them from within Surfguard.

This feature appears at the bottom of both General Reports and Custom Reports screens.

Enter the mode of delivery:

Display Report Here: ☒

Send Report Via Surfguard Message: ☐

Send Report Via Email: ☐

Send to Email:

Enter multiple email addresses separated with commas. **Do not include blank email addresses.**

Recurring Type:

Non-recurring
Recurring Interval:
eg. Weekly Recurring Interval of 2 = report to run once every 2 weeks.

Scheduled Date:

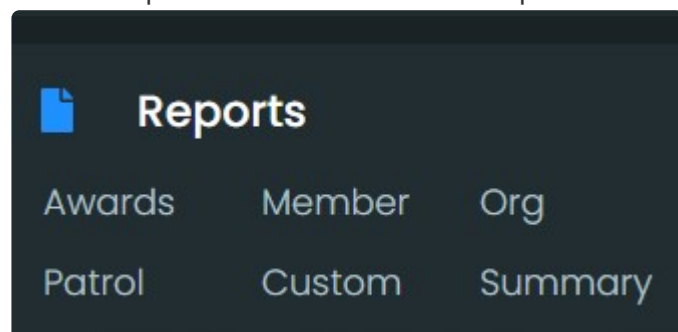
(dd/mm/yyyy)
Time (24hr): 00 00

Leave scheduled date/time blank to schedule immediately.

Display Report Clear

## 9.2 Custom Reports

Custom reports can be access via the quick links 'Report' section located left hand side of screen



or click on the Menu link – Reports – Custom Reports



## Reports

Audits

Assessment, Award & License Reports

Member Reports

Organisational Management Reports

Patrol Reports

Transfer Reports

Custom Reports

New Custom Report

Gear & Equipment Custom Reports

New Gear & Equipment Custom Report

Award Comparison Report

TAF Awards Report

To create a custom report, click on the 'create new report' button

### Custom Reports @ Cairns

Load Saved Template:  No file chosen

OR

Select the output fields that you wish to see in your report by clicking the applicable check-box on the left (blue column). A tick will appear, indicating your selection. The right side of the report (green column) is used to determine your selection criteria. You can also select the display type and the desired document

## set-up

For example, to create a report to see the first name, last name and age of all male members with the occupation of Student. Add a tick beside the first name, last name, and age on the left, and select gender as Male and occupation as Student on the right. Click 'Display Report' at the bottom.

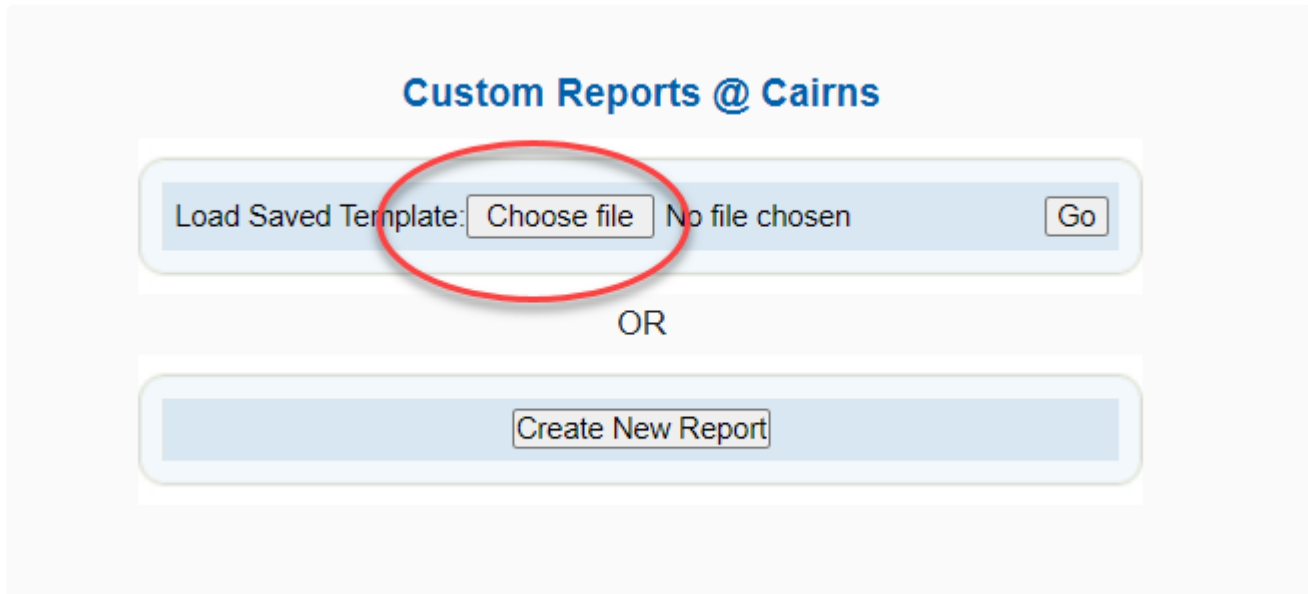
## Saving a Custom Report as an XML file

To save a Custom Report as an XML file you will need to run the report and then save the template file to your computer.

Note: The Display Type needs to be selected as CSV to see this screen to save your report.

## Uploading your Custom Report XML file to SurfGuard

Once you have saved your report you can simply upload the XML file to SurfGuard.



**Custom Reports @ Cairns**

Load Saved Template:  No file chosen

OR

## 9.3 Gear and Equipment Custom Reports

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Gear and Equipment reports work in the same way as the custom reports. This area is used to report on all aspects of a Club, Branch or State's gear and equipment recorded in Surfguard.

To create a new Gear and Equipment custom report, follow the same procedure as described in **Creating a new Custom Report**.

When your report is output to the screen, a link will be provided to save the report for opening at a later date. You can also sort the report on each column by clicking the relevant column header. This report also has the ability to filter by specific Gear and Equipment types.

## 9.4 Report Examples

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### 9.4.1 Member Reports – examples

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#### **REPORT – Who is NOT REGISTERED for the current season**

Go to New Custom Report

Tick on LHS – Member ID, First Name & Last Name (from within the General Details section) and the following below from within the Organisation Membership details section

Organisation Membership Details		Hide Organisation Membership Detail	
<input checked="" type="checkbox"/> Membership Type:		Membership Type:	<div>           Probationary            Junior Activity Member (5-13 years)            Cadet Member (13-15 years)            Active (15-18 yrs)            Active (18yrs and over)            Award Member            Reserve Active            Long Service            Past Active         </div>
		Use the Ctrl or the Shift key to select multiple membership types.	
<input type="checkbox"/> Date Joined:		Date Joined - From:	
<input type="checkbox"/> Date Archived:		Date Archived - From:	
<input type="checkbox"/> Is Archived in All Organisations:		Is Archived in All Organisations:	**
<b>** Please be especially careful when using the Is Archived in All Organisations. Your report may fail due to the processing that is required by this field. If you do require it, please filter your selection so a small data set is retrieved.</b>			
<input checked="" type="checkbox"/> Status:		Status:	<div>           Active            Archived            Deceased            Expelled            Suspended         </div>
<input checked="" type="checkbox"/> Registered for Season:		Registered for Season:	<input type="checkbox"/> OR <input checked="" type="checkbox"/> Not Registered for Current Season: <input checked="" type="checkbox"/>
		eg. 2010 = registered season 2010/2011.	

## REPORT: FIND OUT ACTIVE MEMBERS FOR THE 2023/24 SEASON THAT EITHER DON'T HOLD A BM OR SRC AWARD OR THEIR PROFICIENCY HAS EXPIRED

General Details: Tick LHS: Member ID, First Name, Last Name & Age

Membership Type: Tick LHS and Active (15-18yrs) and Active (18yrs & over)

Status: Tick LHS and Highlight Active

Registered for Season: Tick LHS and put in 2023

Award Name: Tick LHS

Award Expiry Date: Tick LHS

Display the Report.

Use the template first to generate the Report for Bronze Once you generate the report if you scroll to the bottom you will see that there are Active members who hold no Awards. I have copied and pasted these into the 2nd tab of the spreadsheet. We then sorted the spreadsheet by Awards and Expiry date. You can then scroll down and find the Bronze members who have expired proficiency. I have copied these members into the 3rd tab. Then sorted the 2 extra tabs (No Awards & Expired BM) by the club.

To find Active members for the 2023/24 season that either has no SRC or expired SRC change the Membership Type to Cadet Member

## REPORT: EMAIL ADDRESS FOR MEMBER/S

Reports – General Reports – Member Reports

Report Type: Email Lists

Report Output: CSV Style

## REPORT – EMAIL ADDRESS FOR MEMBERS TO PUT IN OUTLOOK

**Why Do It:** Get emails to send out in Outlook to see if they bounce back

## General Reports – Member Reports

Report Type: Email Lists

Output: Semi Colon Delimited (Text Format)

Display Report

Copy & Paste into outlook email.

You will then see what emails bounce back

## **REPORT – CLUB WANTING TO KNOW HOW MANY MEMBERS THEY HAD IN A PREVIOUS SEASON**

### **Option 1**

Reports – General Reports – Member Reports

Report Type – Membership History

Report Output: CSV

Season: put in date you are checking for

You will get the number of members for the season listed at top and also name of each member.

### **Option 2**

If you just want total numbers for each Sub-Membership Category for a specific season you can also go to the Summary Tab

Summary Tab

Display: Sub-Membership Categories

Season: Type in the season you want stats for

You will then be given a list of members in each Membership Category. If you click on the Membership Category you will then be given a list of members in that category

## **REPORT: FIND OUT WHO DOES AND DOESN'T HAVE A MEMBERS AREA ONLINE ACCOUNT**

Go to Reports > General Reports > Member Reports

Report Type: Member Area Accounts

%(color-red)\*REPORT – FIND OUT MEMBERS WHO HAVE RENEWED VIA MEMBERS AREA\* %

(Can Be Generated For Club, Branch, State Etc)

Reports > General Reports > Member Reports

Report Type: Pending Member Requests

Output Format: CSV Style

Click “Advanced Search”

Leave Branch & Organisation as “All”

Organisation Type: Highlight SLS Organisations, Support Operations, Other SLS Organisations

Pending Member Request Type: Highlight “Renew Club Membership”

Pending Members Request Date: 01/07/2023 – 30/06/2024

## Display Report

When you have it in Excel format you may want to De-duplicate by Member ID & Organisation.

## REPORT – LIST ALL AWARDS HELD BY EACH MEMBER OF A PATROL TEAM

Reports – Custom Report – New Custom Report

General Details: First Name & Last Name

Organisation Membership Details: Active & fill in Registered for xxx season

Awards: Tick Award Name on LHS only

Patrol Rosters: Tick Rostered Team Name on LHS and also Patrol Roster Date (you will need to go to the Patrol Roster for a specific date for a specific team.

## REPORT – SENDING OUT MEMBERSHIP RENEWALS

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

- Go to 'Reports' > 'General Reports' > 'Member Reports'.
- Click on 'Advanced Search'
- Report Type = 'Membership Renewal Form'
- Output Format = PDF
- Renewal Season = 2023
- Status = 'Active'
- Registered Season = 2023
- Tick the 'Email to Members' box
- Tick the 'Declaration' box
- Print Cover Letter: 'Yes'
- Print Declaration: 'Yes'
- Print Membership Details: 'No'
- Tick the Display Report Here box.
- Display Report.

Surfguard will then produce a report of members that have been emailed their pre-filled membership form and provide you with pre-filled forms for those without email addresses.

## REPORT – SHOW WHO DOESN'T HAVE OR HAS EXPIRED MEMBER PROTECTION

Reports – Custom Reports – New Custom Report

Once report is created you can save a Template of the report for future use.

General Details:

Member ID – Tick LHS only

First Name – Tick LHS only

Last Name – Tick LHS only

Age – put in 18-99

Phone

Mobile – Tick LHS only

Email

Email address 1 – Tick LHS only

Organisation Membership Details

Status – Tick LHS & Active in Green section

Registered for season – Tick LHS and date for current season in Green section

Pick Membership Categories it is relevant to.

State Based Details

Tick all boxes on LHS except for Student Number

## **REPORT – CHILD PROTECTION DETAILS & PATROL TEAM**

Reports – Custom Reports – New Custom Report

Once report is created you can save a Template of the report for future use.

General Details: Member ID – Tick LHS only

First Name – Tick LHS only

Last Name – Tick LHS only

Age – put in 18-99

Phone

Mobile – Tick LHS only

Email

Email address 1 – Tick LHS only

Organisation Membership Details Status – Tick LHS & Active in Green section

Registered for season – Tick LHS and date for current season in Green section

Pick Membership Categories it is relevant to.

State-Based Details

Tick all boxes on LHS except for Student Number

Patrol Rosters

Rostered Team Name – Tick LHS only

Patrol Roster Date – Tick LHS only

Display Type: CSV (Excel)

Display Report

Once in Excel De-Duplicate by Member ID

## **REPORT – FIND OUT MEMBERS WHO HAVE RENEWED VIA MEMBERS AREA**

(Can Be Generated For Club, Branch, State Etc)

Reports > General Reports > Member Reports

Report Type: Pending Member Requests

Output Format: CSV Style

Click “Advanced Search”

Leave Branch & Organisation as “All”

Organisation Type: Highlight SLS Organisations, Support Operations, Other SLS Organisations

Pending Member Request Type: Highlight "Renew Club Membership"

Pending Members Request Date: 01/07/2023 – 30/06/2024

Display Report

When you have it in Excel format you may want to De-duplicate by Member ID & Organisation.

### **REPORT – FIND OUT WHO HAS PAID THEIR GYM FEES VIA PAYMENT GATEWAY**

Reports – General Reports – Member Reports

Report Type – Transactions

Click on Advanced Search

Transaction Type – Gym

Transaction Payment Method – Credit Card

Date range – default for dates of current season

Display Report

Note: Transaction No. & Payer Name come over from the Members Area

### **BRANCH NEED TO RUN A REPORT ON ALL U13'S FROM EACH CLUB REGISTERED FOR 2020**

To create report:-

Reports – General Reports

Report Type: Membership History

Organisation: need to do for each individual organisation

Age: 12 to 14

Status: Active

Registration Date: 01/07/2019 to 31/03/2020

Download report.

Highlight Column A and then under Data tab click Remove columns not required.

Then sort by Date of Birth.

Looking for DOB between 01/10/1999 to 30/09/2000

### **REPORT – MEMBER ATTRITION / HOW MANY MEMBERS HAVE LEFT/NOT RETURNED**

Reports – General Reports – Member History

Advanced Search

Age 14 – 99 (if desired)

Status: Archived / Deceased / Transferred Out

Membership Type: Active (15-18) / Active (18 and over)

Membership Date: last five years



Go.

Note the CSV/Excel version of this report is horrible. If you need it, best bet is to select the table and sort by member id. You lose some relevant data because the records are not flat but there isn't much else you can do with it in it's current format.

### FAMILY GROUP REPORT WITH MEMBER CURRENT REGISTERED SEASON

Create a custom report to display all family groups, the members of each family group and the members current registered season.

Use the selection criteria as displayed below

[Select All Columns](#) | [Un-Select All Columns](#) | [Show All Sections](#) | [Hide All Sections](#)

Include Column?	Sort Order (not column order)	Column Header	Selection Criteria
<input type="checkbox"/> General Details			<a href="#">Show General Details</a>
<input checked="" type="checkbox"/>		Member ID:	Member ID: <input type="text"/>
<input checked="" type="checkbox"/>		First Name:	First Name: <input type="text"/>
<input checked="" type="checkbox"/>		Last Name:	Last Name - From: <input type="text"/> To: <input type="text"/>
<input type="checkbox"/> Family Group Details			<a href="#">Show Family Group Details</a>
<input checked="" type="checkbox"/>		Family Group Name:	Family Group Name: <input type="text"/>
<input checked="" type="checkbox"/>		Position:	Position: <input type="text"/>
<input type="checkbox"/> Home Address			<a href="#">Show Home Address</a>
<input type="checkbox"/> Postal Address			<a href="#">Show Postal Address</a>
<input type="checkbox"/> Phone Numbers			<a href="#">Show Phone Numbers</a>
<input type="checkbox"/> Email Address			<a href="#">Show Email Address</a>
<input type="checkbox"/> Medical Details			<a href="#">Show Medical Details</a>
<input type="checkbox"/> Clothing Size Details			<a href="#">Show Clothing Size Details</a>
<input type="checkbox"/> Other Details			<a href="#">Show Other Details</a>
<input type="checkbox"/> Enrolment/Background Details			<a href="#">Show Enrolment/Background Details</a>
<input type="checkbox"/> Organisation Membership Details			<a href="#">Show Organisation Membership Details</a>
<input checked="" type="checkbox"/>		Status:	Status: <input type="text"/> <div style="border: 1px solid black; padding: 2px; margin-top: 5px;"> Active  Archived  Deceased  Expelled  Suspended </div>
<input checked="" type="checkbox"/>		Registered for Season:	Registered for Season: <input type="text"/> OR Not Registered for Current Season: <input type="checkbox"/> eg. 2010 = registered season 2010/2011.

## 9.4.2 Assessment Reports – examples

### REPORT: STATE OFFICE FINDING OUT HOW MANY OF A SPECIFIC AWARD HAVE BEEN ALLOCATED IN A SEASON AND HOW MANY PROFICIENCIES ARE DONE

To generate a report for the information you need you can do the following

Reports > General Reports > Assessment, Awards & License Reports

Award Type: Current Awards

Output Format: CSV Style (Excel Format)

Branch: All

Organisation: All

Awards: You can either do them 1 by 1 or select the different award types

Award Allocation (Processed) Date – From: 01/07/2023 to 11/02/2024

Display Report: once you have the report in Excel you can then do sub-totals by Organisation.

Proficiencies: you would run the same report but instead of Award Allocation date you would fill in the Proficiency Allocation Date.

You can then do sub-totals for each club when in Excel

- Club level\*\*\* – If doing this same report for a club you would sort by Award Date and NOT Award Allocation date.

### **REPORT: WHO IS PROFICIENT FOR CURRENT SEASON FOR AN AWARD**

Reports – General Reports – Assessment, Awards & License Reports

Report Type: Current Awards

Output Format: Select CSV

Click on the 'advanced search' button

Status: Active

Registered Season: Type in current season eg: 2023

Award Type: All

Award: Choose the Award from the selection box

Award Expiry Date – From: enter dates as required depending on the search

### **REPORT: HISTORICAL ASSESSMENT REPORT**

Reports – General Reports – Assessment, Awards & License Reports

Report Type: Awards History

Award Type: All

Award: Choose the Award

Either:

1. Award Date From: Awards given for date range
2. Proficiency Date: Proficiency given for a specific Date Range

### **REPORT –CHECK REQUIREMENTS OF THE AWARD FOR CANDIDATE, TRAINER & ASSESSOR**

Reports – General Reports – Assessment, Awards & License Reports

Report Type: Reference: Awards

Award: Choose the Award

Display Report

### **REPORT – BRANCH TRYING TO FIND OUT WHERE A MEMBER HAS DONE AN AWARD OR PROFICIENCY**

Reports – General Reports – Assessment, Awards & License Reports

Report Type: Assessments

Report Output: CSV

Organisation: All

Put in First & Last Name of Candidate

Award Type: All

Award: find the award

Assessment Date: When you run the Assessment Report it is sometime a good idea to put in a large date range in the Assessment Date, eg 01/01/2002 to 01/01/2025. Just in case someone has entered an incorrect date.

Display Report

**REPORT: TO FIND OUT WHO IS NOT PROFICIENT IN AN AWARD FOR CURRENT SEASON (CAN BE USED FOR OTHER PROFICIENCIES)**

Custom Report

Click 'Create New Report'

Open 'General Details' section and tick checkbox (LHS) for: First Name & Last Name

Include Column?	Sort Order (not column order)	Column Header	Selection Criteria
<input type="checkbox"/> General Details <span>Show General Details</span>			
<input checked="" type="checkbox"/>		First Name:	First Name: <input type="text"/>
<input checked="" type="checkbox"/>		Last Name:	Last Name - From: <input type="text"/> To: <input type="text"/>

Open 'Organisation Membership Details' section and tick checkbox (LHS) for Status and highlight 'Active' (RHS)

Tick checkbox for 'Registered Season' (LHS) and type in season eg: 2023 (RHS)

Tick the 'Age Category' checkbox (LHS) if the report is for Nippers.

Include Column?	Sort Order (not column order)	Column Header	Selection Criteria
<input type="checkbox"/> Organisation Membership Details <span>Show Organisation Membership Det</span>			
<input checked="" type="checkbox"/>		Status:	Status: <div>Active Archived Deceased Expelled Suspended</div>
<input checked="" type="checkbox"/>		Registered for Season:	2021 OR Not Registered for Current Season: <input type="checkbox"/> eg. 2010 = registered season 2010/2011.
<input checked="" type="checkbox"/>		Age Category:	<div>           Under 6 (Male/Female)            Under 7 (Male/Female)            Under 8 (Male/Female)            Under 9 (Male/Female)            Under 10 (Male/Female)            Under 11 (Male/Female)            Under 12 (Male/Female)            Under 13 (Male/Female)            Under 14 (Male/Female)         </div>

Open 'Awards' section.

Tick LHS box for 'Awards' – Highlight the name of the award (RHS) eg: Bronze Medallion

Tick LHS boxes "Award Date" & "Proficiency Date" & Award Expiry Date

Include Column?	Sort Order (not column order)	Column Header	Selection Criteria
<input type="checkbox"/> Awards <span>Show Awards</span>			
<input checked="" type="checkbox"/>		Award Name:	<div>           Aussies - Officials Service 30 Years            Aussies - Officials Service 40 Years            Aussies - Officials Service 50 Years            Aussies - Officials Service 60 Years            Austswim Teacher Accreditation            Aviation Reference Number            Award for Non Award Member (120 days)            Basic Emergency Care            Basic First Aid            Basic First Aid Refresher            Basic Life Support            Basic Life Support [AID]            Basic Life Support Certificate            Basic Resuscitation Certificate            Beach Management Module 2 - Beach Team Management            Beach Management Module 2 - Beach Safety and Risk Management         </div>
<input checked="" type="checkbox"/>		Award Date:	Award Date - From: <input type="text"/> To: <input type="text"/> (dd/mm/yyyy)
<input checked="" type="checkbox"/>		Proficiency Date:	Proficiency Date - From: <input type="text"/> To: <input type="text"/> (dd/mm/yyyy)
<input checked="" type="checkbox"/>		Award Expiry Date:	Award Expiry Date - From: <input type="text"/> To: <input type="text"/> (dd/mm/yyyy)

Download Report in CSV

Once in Excel sort by Award column

Remove any unnecessary Awards in the Award Column

Change back to sort by surname

There will be gaps next to names of people who don't have proficiencies

**REPORT: LIST OF AWARDS GAINED IN A SEASON**

**Note:** This report will show Awards gained by members at any Originating Organisation.

Go to Reports > General Reports > Assessment, Awards & License Reports

Report Type: Current Awards

Output Format: CSV Style (Excel Format)

Status: Active

Registered Season: Leave blank

**Award Type:**

AQTF Module
AQTF Qualification
AQTF Unit of Competency
Other
Recognition
Service
SLSA Education

This can be changed depending on the needs of the club, you can display all Award Types if required including all Units of Competency.

Award Date: 01/07/2012 – 30/06/2023 (or whatever date range is applicable)

Display Report

Once in Excel get rid of all columns not required.

Sort by Award Name.

If you want to get a total of each Award then do a Sub-total based on change of Award Name and do a count.

**REPORT: CLUB WANTS TO FIND OUT WHO IS ELIGIBLE/QUALIFIES TO BE RAISED IN AN ASSESSMENT FOR AN AWARD**

Go to Reports > General Reports > Assessment, Awards & License Reports

Report Type: Assessment Eligibility

**REPORT – CAN'T ADD A MEMBER TO A NEW ASSESSMENT REQUEST IT SAYS THEY ARE ALREADY IN AN ASSESSMENT**

Go to General Reports – Assessments, Awards & License Reports

Report Type: Assessments

If searching from SLISA or a state level, and you don't know where the assessment occurred, set Branch and Organisation to "ALL"

Put in Member ID or First & Last Name

Don't choose any specific award

Extend assessment dates – eg 01/07/2020 – 30/06/2025

Display Report

This will show any Assessment the member has ever been in and if it is complete or incomplete.

**Report – Show when awards expire before 31/12/xx**

Reports/General Reports/Assessment and Award reports and select the Current Awards report.

In the Advanced section, you can select specific awards (e.g. Bronze Medallion) and Expiry date range – use 01/07/2019 to 31/12/2020 (for this seasons expiry)

Output to CSV.

If you want to communicate with these members to remind them of when the next proficiency is, use the Communications menu item and use the same filters.

### **REPORT – RTO NEEDS TO KNOW HOW MANY WERE ENROLLED VS COMPLETED ( C / DNC / DNA / NYC )**

Reports/General Reports/Assessment and Award reports and select the Assessments report.

CSV Output.

Advanced Search

If you are at “State”, select “ALL” for Branch and Organisation

Award Type: AQTF Unit of Competency

Awards: Select the Award(s) you are interested in or “All”

Assessment Date – Generally the states need this for the calendar year (e.g. 01/01/2022 to 31/12/2023)

Assessment Type: Award

Assessment Status : Select Completed and Archived

Assessment Result: Select C, DNA, DNC, NYC

Download and use a pivotable to summarise (tick (row labels) Unit Code, Result & (sum value) Member ID)

### **STATE CENTRES: TRACKING AWARDS CREATED AND ALLOCATED VIA THE MEMBERS AREA**

Awards fully processed via the Members Portal are automatically uploaded into the National Membership Database (Surfguard) within a members award file.

To correctly invoice for these awards, State Administrators should run an Award History report:-

Reports > General Reports > Assessment, Award and License Report Reports Type: Awards History

Advanced search Output: CSV Style ( Excel Format) Award Type: Service Award Allocation (Processed)

Date: insert date range required Display Report Sort the spreadsheet by ‘Processed by’ which will show all awards processed via the Portal

## **9.4.3 Patrol Reports – examples**

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### **REPORT – PATROL TYPE HOURS FOR A MEMBER**

Reports – General Reports

Report Type: Patrol Type Hours

Output: CSV (Excel)

First Name

Last Name

### **REPORT: HOW TO ASCERTAIN TOTAL PATROL HOURS FOR EACH MEMBER**

**Note:** This report allows you to break down by Patrol Log Name

This report will give you members patrol hours for ‘all’ organisations that they have patrolled for.

## Reports

### General Reports

#### Patrol Reports

##### Select – Patrol Type Hours report

Click on advanced search – and select the following patrol types (Make Up, Rostered, Substitute, Visitor, Voluntary and Water Safety)

Report Output – CSV.

Once you have produced the report

Delete first row so that column headers are at the top

Highlight all data – click on data from top menu – click on subtotal

Select in 'subtotal' box – Member ID, Sum and Member hours (see diagram below)



If you are a genius at excel spreadsheets and subtotal you could close the subtotal columns on the left hand side which will leave you with just member ID and total number of patrol hours.

Scroll down to find any members with the patrol hour numbers that you are looking for

## TOTAL MEMBER PATROL HOURS REPORT – Custom report

- With membership category

- Does not include Water Safety
- Does not include other organisations
- Template Saved – Total Member Patrol Hours with Membership Category & Specific Patrol Types

#### Custom Report

General Details (tick LHS) First name Last name Member ID

Organisation Membership Details (tick LHS) Membership Type Status (highlight all status options (RHS)

Registered for season (type in 2023 (RHS) )

Patrol Logs (tick LHS) Patrol Log Date (type in 01/07/2023 to 30/06/2024 RHS) Patrol Log Status

Patrol Log Members (tick LHS) Member Patrol Type (select – Make Up, Rostered, Substitute, Visitor, Voluntary (RHS) Member Patrol Time Duration

Select CSV excel format for download format

### **REPORT: TOTAL ROSTERED PATROL HOURS AND WATER SAFETY FOR EACH MEMBER BREAKING IT DOWN BY MEMBERSHIP CATEGORY**

Reports > General Reports > Patrol Reports

Report Type: Patrol Type Hours

Display: CSV

Advanced Search

Status: Active

Registered Season: 2023

Membership Type: Highlight one Membership Type (will have to do report for each membership type) as the Membership Type does not appear as a column in Excel.

Patrol Type: Highlight for example (Make Up, Rostered, Substitute, Visitor, Voluntary and Water Safety)

Date Range: use default date unless you want specific dates

Display Report

Once you have displayed the report you can do “sub total” in Excel by Member ID and add up hours

### **REPORT: STATE OFFICE WANTING TO SEE HOW MANY PATROL TEAMS EACH CLUB HAS**

Reports > General Reports > Patrol Reports

Report Type: Total Team Patrol Hours

Output: CSV

Advanced Search

Branch: All

Organisation: All

Leave the Default Date Range

Once you download the report into Excel. You can delete all columns except for Organisation and Team Name

You can then do a Sub Total based on each change of Organisation Name and the get a Count based on Team Name

**REPORT: FIND MEMBERS WHO ARE NOT COMPLETING THEIR PATROL HOURS**

Reports > General Reports > Patrol Reports

Report Type: Total Member Patrol Hours

Output Format: CSV Style

Click: Advanced Search

Status: Active

Registered Season: 2023

Season Type: Patrol Season

Total Hours: Choose how you want to filter from the drop-down menu and put the number of hours.

Display the Report

**REPORT: TOTAL MEMBER PATROL HOURS**

You can obtain a report for each club of their members 'Total Patrol Hours'.

Drill down to the club level (as this report is only available at club level)

Click on reports – general reports – patrol reports

Select 'total Member Patrol Hours' report.

Select the output format.

At the bottom of the screen change the date range to 01/07/2023 to current date (see below). Some clubs have put into surfguard 'past patrol hours' gained by members prior to surfguard birth in 2003 so you may wish to set the date range back even further.

Once you have this report (in CSV style – delete all columns except first name, last name and All Patrolled Hours (Excluding Penalty Hours)).

**REPORT: TOTAL MEMBERS PATROL HOURS FOR MARCH**

Patrols – General Reports – Patrol Reports

Report Type: Total Member Patrol Hours

Output Format: CSV Style (Excel Format)

Click on Advanced Search

UNTICK "Include Postal Address and DOB in Output"

Status: Active

Organisation Hours Type: Lifesaving Hours

Season Type: Make sure the default is date range

Put in the date range 01/09/2023 – 30/03/2023

UNTICK Include Deficit Hours in Output

Click on Display Report at bottom of page.

**REPORT TO GET THE FOLLOWING STATS BY A BRANCH FOR EACH MONTH**

- Rescues performed
- Activity during rescue i.e. swimming, boardriding
- Equipment uses during rescue i.e. board or IRB
- No first aid cases performed



- No Marine stings
- No visitors to the beach

Go to Reports > General Reports>Patrol Reports

Report Type: Patrolled and/or Unpatrolled Stats

Output Format: CSV Style (Excel Format)

Click Advanced Search

Organisation: All

Include Breakdown by Organisation: Tick this box if you want an additional breakdown for each club

Organisation Type: SLS Organisations

Stats Type: All

Season Type: Make sure the Date Range is highlighted and then you would put in the date range for each month, eg 01/11/2023 – 30/11/2024

Display Section: All

Under the Summary tab, you can also get a summary of Patrol Stats but it only does it for the entire season, there is no option to breakdown by month.

## **REPORT – PATROLLED AND/OR UNPATROLLED STATS**

Reports – General Reports – Patrol Reports

Report Type: Patrolled and/or Unpatrolled Stats

Output: CSV/Excel

Click on Advanced Search

Branch: All

Organisation: All

Include Breakdown by Branch/Organisation: Tick box

Organisation Type: Highlight “SLS Organisations”

Stats Type: All

Season Type: Leave as default date range or modify

Display Sections: Highlight “Rescues”

Display Report

## **PATROL HOURS IN SUMMARY TAB DIFFERENT TO PATROL HOUR CALCULATION IN CUSTOM REPORT**

We've been looking into the SQL for both of these queries and we now understand the reason for the difference in values:

The Patrol Hours Organisation summary takes into account all hours logged for that organisation  
The custom report only takes into account hours logged in that organisation by members of that organisation.

So the summary is actually working as it should.

In the Summary It is countable hours. Specifically, it excludes Penalty, No Show, Non Rostered, Arranged Substitute, Trainee, Other.

## **PATROL LOG / SERVICE COMPARISION REPORT**

Below are some notes on what this report is comparing and why you may get Completed or Partial in the report.

The report is comparing the hours that a club is supposed patrol based on their Service Profile times entered in Surfguard and the start and finish times entered in the patrol log.

For the log on the 24th February in their Service Profile they should have patrolled from 0900-1700hrs but the log for this day shows they patrolled from 1000 – 1400hrs. Therefore they partially patrolled based on their service profile.

For the log on the 4th March the report shows as completed as the service profile for this date range is 1000-1400hrs and this is the same as the hours in the patrol log.

## 9.4.4 Messaging Reports – examples

### REPORT: SEND MESSAGE TO MEMBERS ADVISING WHEN THEIR AWARD IS EXPIRING

To do this a club can go to the Email/SMS option

Once loaded open the “awards” filtering section by ticking the “awards” box.

You can then select the award (eg Senior First aid) and

Select an expiry date period (eg “from” 01/02/2022 – “To” 30/04/2022).

This will then list all members in the club who hold an award of that type that will be expiring in the next 3 months.

The club can then send an SMS message or email to all these people letting them know that their award is expiring and suggest some requal days etc.

### TROUBLESHOOTING MESSAGES NOT BEING SENT

The most likely cause for Surfguard errors with messaging is cutting and pasting text into the Surfguard message. If you have a short message, try just typing it – Surfguard likes PLAIN Text only (no formatting) and avoid use of a lot of special characters ( <>()@#\$\$%^& etc ). If you have a long message, or really want/need to use formatting, save the document and send it as an attachment to the message – Email attachments can be CSV, images, pdf, powerpoint, rich text, spreadsheets, text, word docs, zip/ gzip. Total Max file size 1.5Mb. We are working on an enhancement to make Surfguard more tolerant of formatting and special characters.

If you continue to have trouble with messaging, please ring us on 1300 724 006 while you are at your computer, logged onto Surfguard and we'll sort out what is causing your problems together.

#### Causes for issues:

Type PLAIN Text only (no formatting) and avoid use of a lot of special characters. <>()@#\$\$%^& etc  
SMS can be sent to a maximum of 150 recipients.

Email attachments can be CSV, images, pdf, powerpoint, rich text, spreadsheets, text, word docs, zip/ gzip. Total Max file size 1.5Mb.

For a person to receive email, they must have a valid email address and/or mobile phone in their Surfguard membership details.

If someone is not receiving messages, check their Surfguard membership details, is the checkbox Do not send email/SMS communications ticked?

### SEND EMAIL TO ACTIVE MEMBERS IN CURRENT SEASON AND ALSO THOSE WHO HAVE NOT

**RENEWED FROM PREVIOUS SEASON**

Go to Message > Email/SMS

Message Type: Communicate With Members

Output Format: Email

Click 'Advanced Search'

DON'T USE "Registered Season" USE: Registration Date eg 01/07/2021 – 31/06/2022

**MESSAGE HISTORY HOW TO FIND A MESSAGE OR EMAIL THAT WAS SENT BY SURFGUARD**

Select the Club/Organisation that sent the message

Click Maintenance > Background Reports/Messages > Scheduled Background Reports / Messages

Change "Enabled" to "All"

If you know when the message was sent, you can limit your output by using the Scheduled Run Date To/From boxes.

You can sort the messages by "Output Format" (email, sms) or by Scheduled Date/Time if you know when the original message was sent.

Select the message, click "View" on the right hand side, and you can see who the message was sent to.

## 9.4.5 Reporting Webinar

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Overview of Managing Members within Surfguard and associated systems, presented as a webinar on 16th July 2019. Produced by Surf Life Saving Australia as part of ongoing training and support to clubs and membership.

## 9.4.6 Reporting – Officers With Additional Admin Function

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The Officer's report in Surfguard at all levels of the organisation allows for an output that lists all

Officers.

To access the report in Surfguard go to Reports > Org

The report types available will differ depending on what level of the organisation you are at.

Club Level select the report type: Officers – Club/Organisation

Click on the 'advanced search' button.

Filter your report by date, officer role, administration role.

**Organisational Management Reports @ Clovelly**

**Report Type:** 1 Officers - Club/Organisation

**Output Format:** Single HTML Page

**Please Note:** Relative dates will shift by the number of days difference between today and when the report is run.

**Enter the following Officer fields to narrow your search:**

**Officer Position:** All Officer Positions, Welfare Officer, Active Kids Voucher 1, Active Kids Voucher 2, Active Kids Voucher 3, Administration, Administration 2, Administration 3, After Hours Emergency Contact

**Officer Date:** From: 01/07/2021 (dd/mm/yyyy) ☒ Relative to today for recurring reports  
To: 30/06/2022 (dd/mm/yyyy) ☒ Relative to today for recurring reports

**Include Empty Officer Positions:** ☒

**Administrative Functions:** 2 Approve News, Approve Library, Shop Admin, Approve Forms

**Show Email:** ☒ If an alternate email has been added to the officer position it will display in the report.

**Show Phone:** ☒

# 10. Branch/State Additional Functions

The details displayed in SurfGuard are dependent on your level of access. For those who have Branch or State level administrative access, a range of different sub-menu options is available. The available view on some screens will also be expanded to include all Club information within your Branch or State.

## 10.1 Members

There are two additional features under this tab

1. Membership at Multiple Organisations Display
2. Endorsing Transfers on Behalf of Losing Clubs

### 1. Membership at Multiple Organisations Display

If searching for a member at a Branch, State or National level and the member belongs to more than one organisation, instead of listing them many times, the Find Member screen displays the member once only and a link is provided to view all their organisations and details related to them.

The screenshot shows the SurfGuard web application interface. At the top, there is a navigation bar with tabs: Summary, Members (selected), Education, Organisational Management, Patrols, Messages, Maintenance, and Reports. Below the navigation bar, the page title is 'Members @ Surf Life Saving Australia'. The main content area displays a table of member information. A popup window titled 'Multi-Memberships' is open, showing a list of organisations for a specific member. The popup includes a 'Close' button and a table with columns: No., Organisation, Registered Season, Status, Membership Category, and Competitor.

Member ID	Surname	First Name	DOB	Organisation	Registered Season	Status	Membership Category	Competitor	Contact Number	User Options
<input type="checkbox"/> 4263832	Border	Allan	15/10/1965	Multi-Memberships						

Criteria: First Name begins with allan; Surname begins with bor; Competitor

Page: 1  
Total Records: 1

No.	Organisation	Registered Season	Status	Membership Category	Competitor
1	Test NSW Club	2017 - 2018	Active	Life Member	No
2	Test Vic Club	2017 - 2018	Active	Award Member	Yes
3	Avalon Beach	2016 - 2017	Archived	Award Member	No
4	Life Saving Victoria Academy	2017 - 2018	Active	Non Member Participants	No
5	Test NSW Support Ops Club	2014 - 2015	Active	Active (18yrs and over)	No
6	TEST WA Club	2015 - 2016	Active	Award Member	No

### Membership at Multiple Organisations

To turn off this feature, use the checkbox beside Return single row for multi- memberships on the Find Member screen

**Find Member @ Surf Life Saving Australia**

**Search For a Member**

State:

Branch:

Organisation:

Member ID:

First Name:

Last Name:

Date of Birth - From:   To:   (dd/mm/yyyy)

Home Phone:  Mobile:

Email:

Competitor:

- ☒ - Include active records
- ☒ - Include archived records
- ☐ - Include suspended records
- ☐ - Include deceased records
- ☐ - Include expelled records
- ☐ - Only members with awards
- ☐ - Only members with patrol data
- ☐ - Only members with pending member requests
- ☐ - Only members with notes
- ☐ - Only members with documents
- ☒ - Check this to search on part of name
- ☒ - Return single row for multi-memberships

Records Per Page:

If a member is not appearing in your list when searching a member, please ensure you also tick boxes such as 'Include Suspended records, Expelled and deceased'. SLSA is the only organisation that can change a member file to Expelled.

Where a person belongs to more than one organisation within a branch/state, all the person's memberships are listed in a simple, easy to view membership section. A button is available next to each organisation to open the details and view/edit as required.

### Normal View

SurfGuard Administrators who have club access will see this view.

**Lifesaving Membership(s)**
v Expand All Lifesaving

**1. Surf Life Saving SA Academy**

Membership Category: Community

Sub-Membership Category: Non Member Participants

Suggested Sub-Membership Categories: [expand](#)

Date Joined: \* 26/06/2018  
 (dd/mm/yyyy)

Membership Status: Archived

Registered for Season: 2018 - 2019

Register for Season: Previous Current Next

Locker No:

Club Keys:

**Guardian Information**

Guardian First Name:

Guardian Last Name:

**Declaration Information**

Signed Membership Declaration: ☐

Signed Liability Declaration: ☐

Signed Guardian Declaration: ☐

Signed Date:   
 (dd/mm/yyyy)

**Member Verification**

### Condensed View

SurfGuard Administrators who have Branch/State or National will see the condensed view.

**Lifesaving Membership(s)**
v Expand All Lifesaving

**1. Surf Life Saving SA Academy**

**2. Test NSW Club**

**3. Test NSW Support Ops Club**

**4. Test QLD Club**

**5. Test Vic Club**

## 2. Transfers

The transfer rules and definitions which apply in SurfGuard are explained in [Section 3.7](#)

If a Branch/State approves a Not Endorsed transfer, they are overriding the decision of the Club and, in effect, endorsing the transfer on behalf of the Club.

To carry out the wishes of the Club, the Branch/State should reject the transfer.

**Note:** Branch and State can only get involved in processing a transfer on behalf of a club if the club has not actioned the transfer in 21 days.

Type: All
Status: All

Winning Club: All
Losing Club: All

Direction: Transfer In/Out
Member Name: Transfer In/Out

Sort By: Winning Club
Reset Filters Go

ID	Member ID	Name	Winning Club	Losing Club	Transfer Type	Create Date	Most Recent Action Date	Age	Status	Action
110653	4 76		Wanda	Elouera	Full Transfer	14 20 14 020	3 days	New		<a href="#">Endorse for Club</a> <a href="#">Not Endorse for Club</a>

# 10.1.1 Membership at Multiple Organisations Display

## 1. Membership at Multiple Organisations Display

If searching for a member at a Branch, State or National level and the member belongs to more than one organisation, instead of listing them many times, the **Find Member** screen displays the member once only and a link is provided to view all their organisations and details related to them.

**SURFGUARD**
Surf Life Saving Australia

Summary ☒
Members ☒
Education ☒
Organisational Management ☒
Patrols ☒
Messages ☒
Maintenance ☒
Reports ☒

Members @ Surf Life Saving Australia

☐ Member ID Surname First Name DOB Organisation Registered Season Status Membership Category Competitor Contact Number User Options

☐ 4263832 Border Allan 15/10/1965 Multi-Memberships

Criteria: First Name begins with allan; Surname begins with bor; Competitor

Page: 1  
Total Records: 1

No.	Organisation	Registered Season	Status	Membership Category	Competitor
1	Test NSW Club	2017 - 2018	Active	Life Member	No
2	Test Vic Club	2017 - 2018	Active	Award Member	Yes
3	Avalon Beach	2016 - 2017	Archived	Award Member	No
4	Life Saving Victoria Academy	2017 - 2018	Active	Non Member Participants	No
5	Test NSW Support Ops Club	2014 - 2015	Active	Active (18yrs and over)	No
6	TEST WA Club	2015 - 2016	Active	Award Member	No

### Membership at Multiple Organisations

To turn off this feature, use the checkbox beside Return single row for multi- memberships on the Find Member screen



**Find Member @ Surf Life Saving Australia**

**Search For a Member**

State:

Branch:

Organisation:

Member ID:

First Name:

Last Name:

Date of Birth - From:   To:   (dd/mm/yyyy)

Home Phone:  Mobile:

Email:

Competitor:

- ☒ - Include active records
- ☒ - Include archived records
- ☐ - Include suspended records
- ☐ - Include deceased records
- ☐ - Include expelled records
- ☐ - Only members with awards
- ☐ - Only members with patrol data
- ☐ - Only members with pending member requests
- ☐ - Only members with notes
- ☐ - Only members with documents
- ☒ - Check this to search on part of name
- ☒ - Return single row for multi-memberships

Records Per Page:

If a member is not appearing in your list when searching a member, please ensure you also tick boxes such as 'Include Suspended records, Expelled and Deceased'. SLSA is the only organisation that can change a member file to Expelled.

Where a person belongs to more than one organisation within a Branch/State, all the person's memberships are listed in a simple, easy to view membership section. A button is available next to each organisation to open the details and view/edit as required.

## 10.1.2 Viewing Multiple Memberships

### Normal View

SurfGuard Administrators who have club access will see this view.

**Lifesaving Membership(s)**
v Expand All Lifesaving

**1. Surf Life Saving SA Academy**

Membership Category: Community

Sub-Membership Category: Non Member Participants

Suggested Sub-Membership Categories: [expand](#)

Date Joined: \* 26/06/2018  
 (dd/mm/yyyy)

Membership Status: Archived

Registered for Season: 2018 - 2019

Register for Season: Previous Current Next

Locker No:

Club Keys:

**Guardian Information**

Guardian First Name:

Guardian Last Name:

**Declaration Information**

Signed Membership Declaration: ☐

Signed Liability Declaration: ☐

Signed Guardian Declaration: ☐

Signed Date:   
 (dd/mm/yyyy)

**Member Verification**

### Condensed View

SurfGuard Administrators who have Branch/State or National will see the condensed view.

**Lifesaving Membership(s)**
v Expand All Lifesaving

**1. Surf Life Saving SA Academy**

**2. Test NSW Club**

**3. Test NSW Support Ops Club**

**4. Test QLD Club**

**5. Test Vic Club**

## 10.1.3 State/Branch Transfer Approval and Bulk Transfers

### Transfers

The transfer rules and definitions which apply in SurfGuard are explained in [Section 3.7](#)

If a Branch/State approves a Not Endorsed transfer, they are overriding the decision of the Club and, in effect, endorsing the Transfer on behalf of the Club.

To carry out the wishes of the Club, the Branch/State should reject the transfer.

**Note:** Branch and State can only get involved in processing a transfer on behalf of a club if the club has not actioned the transfer in 21 days.

Type: All
Winning Club: All
Direction: Transfer In/Out
Sort By: Winning Club

Status: All
Losing Club: All
Member Name: Member Name

Reset Filters
Go

Transfer In										
ID	Member ID	Name	Winning Club	Losing Club	Transfer Type	Create Date	Most Recent Action Date	Age	Status	Action
110653	476	Member Name	Wanda	Elouera	Full Transfer	14/20/14	14/02/20	3 days	New	<a href="#">Endorse for Club</a> <a href="#">Not Endorse for Club</a>

### Bulk Transfers

At a Branch level, there is also the ability to do a Bulk Transfer of members. To access this function go to Members > Transfer > Bulk Transfer Out.

Fill in the details for the Winning Club and then add either the Member ID or at least 2 characters of the Last Name or at least 1 character of the First Name and 1 character of the Last Name.

Highlight the name in the Left-Hand Box and move them to the Right-Hand Box. Click Submit and the transfer is complete.

**Note:** Bulk Transfer function that is only available at a Branch level. Bulk transfers can only be done to Non-SLS Organisations eg Lifeguard Services and Support Operations.

## 10.2 Education

Generally, only members who are not in another incomplete assessment request will be listed as the available members for assessment.

Age restrictions and pre-requisites are implemented; hence, minimum and maximum ages are as of 30 September of the current registration season or as of the current date if past 30 September.

The following Assessment rules or definitions apply in SurfGuard.

**Manual Award Number:** This is a manual number that the state can allocate to a member for an award.

It will appear in the engravers report and certificate.

**Proficiency Type:** Only members who hold the award will be listed in the available members.

**All Other Assessment Types:** Only members who do not hold the award will be listed in the available members.

Clubs, Branches and States can Archive Assessments.

To archive complete assessments if you are a State, select 'Assessment Status – Complete' and 'All' Assessment Types.

To archive complete assessments if you are a Branch (or Club), select 'Assessment Status – Complete' Status and 'Proficiency' Assessment Type.

To archive rejected assessments, select 'Rejected' Status. An 'Archive' button will appear against each individual Assessment/Proficiency. When clicked, it will archive the currently displayed assessment request.



It should be noted that Clubs and Branches should follow their State Office procedures in relation to Archiving Awards.

**Assessment Request List @ Surf Life Saving Australia**

State:   
Branch:   
Assessment Status:   
Award Type:   
Assessment ID:   
Source Company:

For This Organisation: ☒  
Organisation:   
Assessment Type:   
Award:   
Proposed Assessment Date - From:  To:  (dd/mm/yyyy)  
Activity Start Date - From:  To:  (dd/mm/yyyy)

Surf Life Saving Australia <a href="#">(Award Finance Summary)</a> <a href="#">(Award Issue Advice)</a>									
Select	ID	Award/Qualification/UOC	Assessment Type	Organisation (Enrolment Source Company)	No. of Members	Proposed Assessment Date	Activity Start Date	Status	Action
	534183	SS - Craft Scrutineer Official	Award	Surf Life Saving Australia	4	03/10/2019	03/10/2015	Complete	<a href="#">Update</a> <a href="#">Enrolment Form</a> <a href="#">Export Results</a> <a href="#">Form 14</a> <a href="#">Print Attendance Sheet</a> <a href="#">Print Engravers Report</a> <a href="#">Print SLA Certificate</a> <a href="#">Archive</a>

Total: 1 assessment(s).

Total: 1 assessment(s) in 1 organisation(s).

## 10.3 Patrols

### Closing and re-opening Patrol Logs

At a State and branch level, the 'Authorise Requests' option allows you to authorise changed to Patrol Logs that need to be made by clubs.

This screen has a number of options and allows you to sort data by Council, Beach, Action Types, Request Types/or Status Types.

Authorise Requests by clicking the 'Accept' or 'Reject' buttons in the 'Actions' column for the relevant Patrol Log entry.

You will be required to notate a reason for rejecting or accepting the requested action before continuing.

**URFGUARD** Life Saving Victoria

[Members](#)
[Education](#)
[Organisational Management](#)
[Patrols](#)
[Messages](#)
[Maintenance](#)
[Reports](#)
Member S...

Patrol Log/Unpatrolled Stats Requests View @ Life Saving Victoria

Branch:

Organisation:

Action Types:

Request Types:   
Request Status:

Organisation	Request Date	Request Type	Requested By	Action Type	Request Reason	Status	Patrol Date	Patrol Name	Authorise Date	Authorise Reason	Date Closed	Actions
Test Vic Club	15/04/2020	Patrols	Somerfield, Joshua	Delete	test	Waiting	15/04/2020	TEST IT Morning Checks				<input type="button" value="Accept"/> <input type="button" value="Reject"/>

## Other Service Hours

See below how to add Other Service Hours in SurfGuard

Mark in the members profile in Surfguard if they are eligible for an exemption

**Waratah Beach Membership Details**

Membership Category:

Sub-Membership Category:

**Suggested Sub-Membership Categories:** [expand](#)

Date Joined: \*  (dd/mm/yyyy)

Membership Status:

Registered for Season:

Register for Season:

Competitive rights: ☒ Yes ☐ No

**Patrol Hour Exemption:**

Locker No:

Club Keys:

**Guardian Information**

Guardian First Name:

Guardian Last Name:

State Centre can setup in Surfguard Other Service position types for Service Hours in the case of South Australia, they have set up one position called Sport Official.

Surf Life Saving SA

Patrols Messages Maintenance Reports

Patrol Positions @ Surf Life Saving SA

Position Type: All

NOTE: Patrol Positions with Position Type 'Other Service' have no Award Criteria.

Position	Position Type	Display Order	Actions		
Age Group Manager	Other Service	1	<a href="#">Details</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
Club Management/Administration	Other Service	1	<a href="#">Details</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
Patrol Captain	Lifesaving	1	<a href="#">Details</a>	<a href="#">Edit</a>	<a href="#">Award Criteria</a> <a href="#">Delete</a>
Sport Coaching	Other Service	1	<a href="#">Details</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
Sport Official	Other Service	1	<a href="#">Details</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
Vice Captain	Lifesaving	2	<a href="#">Details</a>	<a href="#">Edit</a>	<a href="#">Award Criteria</a> <a href="#">Delete</a>
IRB Driver	Lifesaving	3	<a href="#">Details</a>	<a href="#">Edit</a>	<a href="#">Award Criteria</a> <a href="#">Delete</a>
IRB Crew	Lifesaving	4	<a href="#">Details</a>	<a href="#">Edit</a>	<a href="#">Award Criteria</a> <a href="#">Delete</a>
ARTC Operator	Lifesaving	5	<a href="#">Details</a>	<a href="#">Edit</a>	<a href="#">Award Criteria</a> <a href="#">Delete</a>
Bronze Medallion	Lifesaving	6	<a href="#">Details</a>	<a href="#">Edit</a>	<a href="#">Award Criteria</a> <a href="#">Delete</a>

Add Member and Hours to the Other Service Log once the positions are setup by State clubs can then enter the other service hours. To do this select Patrols > Other Service Log > Add Other Service Log

Other Service Log Details:

Patrol Name: Other Service

Date: 31/01/2020 dd/mm/yyyy

Retrieve Available Members:

Include Non-Financial Members: ☐

Available Members

- Account, Test
- Accounts, Test
- Ahsan, Kazi
- allens, stovie
- Anderson, Michael
- Andrews, r
- Rakich, Rnu

No.	Position	Remove Member	Add Member	Member	Start Time	Finish Time	Total Time
1	Official	<	Mbr >	Bunny, Bugs	10:00	16:00	06:00
2	BBQ	<	Mbr >	Butler, Peanut	08:00	17:00	08:00
3		<	Mbr >		00:00	00:00	00:00
4		<	Mbr >		00:00	00:00	00:00

## 10.3.1

### Closing and re-opening Patrol Logs

At a State and branch level, the 'Authorise Requests' option allows you to authorise changed to Patrol Logs that need to be made by clubs.

This screen has a number of options and allows you to sort data by Council, Beach, Action Types, Request Types/or Status Types.

Authorise Requests by clicking the 'Accept' or 'Reject' buttons in the 'Actions' column for the relevant Patrol Log entry.

You will be required to notate a reason for rejecting or accepting the requested action before continuing.

**URFGUARD** Life Saving Victoria

[Members](#)
[Education](#)
[Organisational Management](#)
[Patrols](#)
[Messages](#)
[Maintenance](#)
[Reports](#)
Member S...

Patrol Log/Unpatrolled Stats Requests View @ Life Saving Victoria

Branch:

Organisation:

Action Types:

Request Types:   
Request Status:

Organisation	Request Date	Request Type	Requested By	Action Type	Request Reason	Status	Patrol Date	Patrol Name	Authorise Date	Authorise Reason	Date Closed	Actions
Test Vic Club	15/04/2020	Patrols	Somerfield, Joshua	Delete	test	Waiting	15/04/2020	TEST IT Morning Checks				<input type="button" value="Accept"/> <input type="button" value="Reject"/>

## 10.3.2 Other Service Hours

### Other Service Hours

See below how to add Other Service Hours in SurfGuard

Mark in the members profile in SurfGuard if they are eligible for an exemption

**Waratah Beach Membership Details**

Membership Category:

Sub-Membership Category:

Suggested Sub-Membership Categories: [expand](#)

Date Joined: \*  (dd/mm/yyyy)

Membership Status:

Registered for Season:

Register for Season:

Competitive rights: ☒ Yes ☐ No

**Patrol Hour Exemption:**

Locker No:

Club Keys:

**Guardian Information**

Guardian First Name:

Guardian Last Name:

State Centre can setup in SurfGuard 'Other Service' position types for Service Hours in the case of South Australia, they have set up one position called Sport Official.



Surf Life Saving SA

[Patrols](#)
[Messages](#)
[Maintenance](#)
[Reports](#)

### Patrol Positions @ Surf Life Saving SA

Position Type: All

**NOTE:** Patrol Positions with Position Type 'Other Service' have no Award Criteria.

Position	Position Type	Display Order	Actions
Age Group Manager	Other Service	1	<a href="#">Details</a> <a href="#">Edit</a> <a href="#">Delete</a>
Club Management/Administration	Other Service	1	<a href="#">Details</a> <a href="#">Edit</a> <a href="#">Delete</a>
Patrol Captain	Lifesaving	1	<a href="#">Details</a> <a href="#">Edit</a> <a href="#">Award Criteria</a> <a href="#">Delete</a>
Sport Coaching	Other Service	1	<a href="#">Details</a> <a href="#">Edit</a> <a href="#">Delete</a>
<b>Sport Official</b>	<b>Other Service</b>	1	<a href="#">Details</a> <a href="#">Edit</a> <a href="#">Delete</a>
Vice Captain	Lifesaving	2	<a href="#">Details</a> <a href="#">Edit</a> <a href="#">Award Criteria</a> <a href="#">Delete</a>
IRB Driver	Lifesaving	3	<a href="#">Details</a> <a href="#">Edit</a> <a href="#">Award Criteria</a> <a href="#">Delete</a>
IRB Crew	Lifesaving	4	<a href="#">Details</a> <a href="#">Edit</a> <a href="#">Award Criteria</a> <a href="#">Delete</a>
ARTC Operator	Lifesaving	5	<a href="#">Details</a> <a href="#">Edit</a> <a href="#">Award Criteria</a> <a href="#">Delete</a>
Bronze Medallion	Lifesaving	6	<a href="#">Details</a> <a href="#">Edit</a> <a href="#">Award Criteria</a> <a href="#">Delete</a>

Add Member and Hours to the Other Service Log once the positions are setup by State.  
 Clubs, Branches & States can then enter the other service hours. To do this select Patrols > Other Service Log > Add Other Service Log

**Other Service Log Details:**

Patrol Name: Other Service

Date: 31/01/2020 dd/mm/yyyy

**Retrieve Available Members:**

Include Non-Financial Members: ☐

**Available Members**

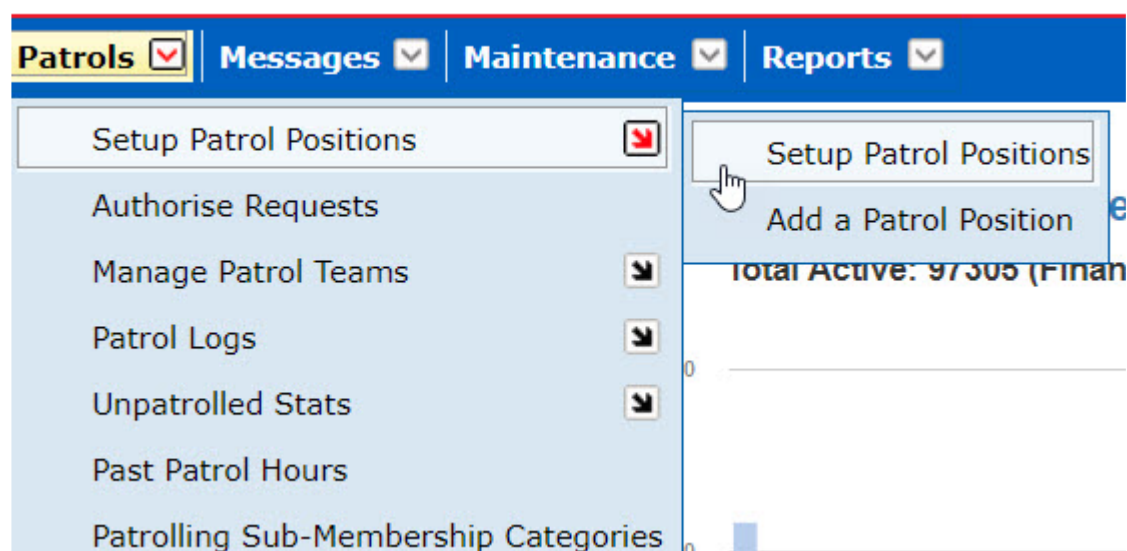
- Accounto, Test
- Accounts, Test
- Ahsan, Kazi
- allans, stovie
- Anderson, Michael
- Andrews, r
- Rakhsch, Rnu

No.	Position	Remove Member	Add Member	Member	Start Time	Finish Time	Total Time
1	Official	<	Mbr >	Bunny, Bugs	10:00	16:00	06:00
2	BBQ	<	Mbr >	Butter, Peanut	08:00	17:00	08:00
3		<	Mbr >		00:00	00:00	00:00
4		<	Mbr >		00:00	00:00	00:00

## 10.3.3 Set Up Patrol Positions

From the Patrols Menu tab – select 'Set Up Patrol Positions'





The screen will display a list of the current Patrol Positions set up for the users State that are displayed in a patrol log.

The Options buttons allows for viewing the details of each patrol position, editing, viewing the award criteria for each patrol position and deleting.

☒ **Patrols** ☐
☒ **Messages** ☐
☒ **Maintenance** ☐
☒ **Reports** ☐

## Patrol Positions @ Surf Life Saving NSW

Position Type:

All

**NOTE:** Patrol Positions with Position Type 'Other Service' have no Award Criteria.

Position	Position Type	Display Order	Actions			
Patrol Captain	Lifesaving	1	<a href="#">Details</a>	<a href="#">Edit</a>	<a href="#">Award Criteria</a>	<a href="#">Delete</a>
Vice Captain	Lifesaving	2	<a href="#">Details</a>	<a href="#">Edit</a>	<a href="#">Award Criteria</a>	<a href="#">Delete</a>
IRB Driver	Lifesaving	3	<a href="#">Details</a>	<a href="#">Edit</a>	<a href="#">Award Criteria</a>	<a href="#">Delete</a>
IRB Crew	Lifesaving	4	<a href="#">Details</a>	<a href="#">Edit</a>	<a href="#">Award Criteria</a>	<a href="#">Delete</a>
ART Operator	Lifesaving	5	<a href="#">Details</a>	<a href="#">Edit</a>	<a href="#">Award Criteria</a>	<a href="#">Delete</a>
Patrol Application Captain	Lifesaving	5	<a href="#">Details</a>	<a href="#">Edit</a>	<a href="#">Award Criteria</a>	<a href="#">Delete</a>
First Aid Officer	Lifesaving	6	<a href="#">Details</a>	<a href="#">Edit</a>	<a href="#">Award Criteria</a>	<a href="#">Delete</a>
Bronze Member	Lifesaving	7	<a href="#">Details</a>	<a href="#">Edit</a>	<a href="#">Award Criteria</a>	<a href="#">Delete</a>
Radio Operator	Lifesaving	7	<a href="#">Details</a>	<a href="#">Edit</a>	<a href="#">Award Criteria</a>	<a href="#">Delete</a>
Award Member	Lifesaving	8	<a href="#">Details</a>	<a href="#">Edit</a>	<a href="#">Award Criteria</a>	<a href="#">Delete</a>
SRC	Lifesaving	9	<a href="#">Details</a>	<a href="#">Edit</a>	<a href="#">Award Criteria</a>	<a href="#">Delete</a>
Supervisor	Lifeguard	10	<a href="#">Details</a>	<a href="#">Edit</a>	<a href="#">Award Criteria</a>	<a href="#">Delete</a>
Senior Lifeguard	Lifeguard	11	<a href="#">Details</a>	<a href="#">Edit</a>	<a href="#">Award Criteria</a>	<a href="#">Delete</a>
Lifeguard	Lifeguard	12	<a href="#">Details</a>	<a href="#">Edit</a>	<a href="#">Award Criteria</a>	<a href="#">Delete</a>
RWC Operator	Lifesaving	13	<a href="#">Details</a>	<a href="#">Edit</a>	<a href="#">Award Criteria</a>	<a href="#">Delete</a>
Surfcom Supervisor	Lifesaving	14	<a href="#">Details</a>	<a href="#">Edit</a>	<a href="#">Award Criteria</a>	<a href="#">Delete</a>
SurfCom Radio Operator	Lifesaving	15	<a href="#">Details</a>	<a href="#">Edit</a>	<a href="#">Award Criteria</a>	<a href="#">Delete</a>
ORB Skipper	Lifesaving	16	<a href="#">Details</a>	<a href="#">Edit</a>	<a href="#">Award Criteria</a>	<a href="#">Delete</a>
ORB Driver	Lifesaving	17	<a href="#">Details</a>	<a href="#">Edit</a>	<a href="#">Award Criteria</a>	<a href="#">Delete</a>
ORB Crew	Lifesaving	18	<a href="#">Details</a>	<a href="#">Edit</a>	<a href="#">Award Criteria</a>	<a href="#">Delete</a>
ORB Trainee	Lifesaving	19	<a href="#">Details</a>	<a href="#">Edit</a>	<a href="#">Award Criteria</a>	<a href="#">Delete</a>

### Patrol Position Award Criteria

Click on the Action Button 'Award Criteria' for a patrol position to view all the awards that a member must/should hold.

From the screen users can add additional award criteria by clicking on the 'create new condition' button located bottom of the screen.

### Patrol Award Criteria Maintenance @ Surf Life Saving NSW

Conditions	Options
1 - Bronze Medallion AND Silver Medallion Beach Management AND Proficient in Advanced Resuscitation Techniques Certificate OR	<a href="#">Edit</a> <a href="#">Delete</a>
2 - Proficient in Bronze Medallion AND Silver Medallion Beach Management OR	<a href="#">Edit</a> <a href="#">Delete</a>
3 - Bronze Medallion AND Silver Medallion Beach Management AND Proficient in Advanced Resuscitation Techniques Certificate OR	<a href="#">Edit</a> <a href="#">Delete</a>
4 - Bronze Medallion AND Proficient in Radio Operator Certificate AND Silver Medallion Beach Management OR	<a href="#">Edit</a> <a href="#">Delete</a>
5 - Bronze Medallion AND Proficient in Resuscitation Certificate AND Silver Medallion Beach Management OR	<a href="#">Edit</a> <a href="#">Delete</a>
6 - Bronze Medallion AND Silver Medallion Beach Management AND Proficient in Apply (Senior) First Aid OR	<a href="#">Edit</a> <a href="#">Delete</a>
7 - Bronze Medallion AND Proficient in Spinal Management AND Silver Medallion Beach Management OR	<a href="#">Edit</a> <a href="#">Delete</a>
8 - Bronze Medallion AND Silver Medallion Beach Management AND Proficient in Advanced Resuscitation Techniques [AID] OR	<a href="#">Edit</a> <a href="#">Delete</a>
9 - Silver Medallion Beach Management Do Not Use	<a href="#">Edit</a> <a href="#">Delete</a>
<b>Total - 9</b>	

[Create New Condition](#) [Cancel](#)

## 10.3.4 Patrolling Sub-Membership Categories

### Patrolling Sub-Membership Categories

Each State is responsible for setting up the Patrolling Sub-Membership Categories.

Only members/lifeguards that fall into one of their States Patrolling Sub-Membership Categories can be added to a patrol log.

**SURFGUARD**

Surf Life Saving NSW

[Summary](#) | [Members](#) | [Education](#) | [Organisational Management](#) | [Patrols](#) | [Messages](#) | [Maintenance](#) | [Reports](#)

**Patrolling Sub-Membership Categories @ Surf Life Saving NSW**

**Sub-Membership Category:**  

Junior Activity Member (5-13 years)

Add
Clear
Cancel

Sub-Membership Category	Actions
Probationary	<a href="#">Delete</a>
Junior Activity Member (5-13 years)	<a href="#">Delete</a>
Cadet Member (13-15 years)	<a href="#">Delete</a>
Active (15-18 yrs)	<a href="#">Delete</a>
Active (18yrs and over)	<a href="#">Delete</a>
Award Member	<a href="#">Delete</a>
Reserve Active	<a href="#">Delete</a>
Long Service	<a href="#">Delete</a>
Past Active	<a href="#">Delete</a>
Associate	<a href="#">Delete</a>
Life Member	<a href="#">Delete</a>
General	<a href="#">Delete</a>
Honorary	<a href="#">Delete</a>
Non Member Participants	<a href="#">Delete</a>
Trainee Lifeguard	<a href="#">Delete</a>
Casual Lifeguard	<a href="#">Delete</a>
Part-Time Lifeguard	<a href="#">Delete</a>
Full-Time Lifeguard	<a href="#">Delete</a>
Senior Lifeguard	<a href="#">Delete</a>
Lifeguard Supervisor	<a href="#">Delete</a>

# 10.4 Maintenance

## Allocating Awards to a Member

Only States can manually allocate Awards to Members using the 'Awards Allocations' sub-menu in SurfGuard. This allows you to search for a member by using their full name or member identification number. You can use drop-down options to enter all relevant information including their club name and the details of the award as seen in the image below.

### Award Type Details

Allocation Type:
Award

Award Type:
All Awards

#### Available Awards:

- Safeguarding Children and Young People Awareness
- Safer Surf Clubs Online Part 1
- Safer Surf Clubs Online Part 2
- Safer Surf Clubs Online Part 3
- Safer Surf Clubs Online Part 4
- Search as a member of an air search team (PUAAMS0)
- Search as a member of an aquatic search team (PUAS)
- Secure cargo (TLIA1001)
- Show leadership in the workplace (BSBMGT401)
- Silver Medallion Aquatic Rescue
- Silver Medallion Beach Management
- Silver Medallion Communications Centre Operator
- Silver Medallion IRB Driver
- Sir Adrian Curlewis Scholarship
- SLSA Life Member

#### Selected Awards:

- Silver Medallion Advanced First Aid [AID]

Select award and then use the > arrow to move award to Selected Awards column

>
<

Override Prerequisite Checks:
☒

### Included Units of Competency

#### Available:

#### Selected:

- Provide advanced first aid (HLTAID006)

>
<

### Member Search

State:
Surf Life Saving NSW

Branch:
Test NSW Branch

Organisation:
Test NSW Club

Member ID:

First Name:
Joshua

Last Name:
Somerfield

Get Member List

Filter by Branch/Organisation  
And search for a member by using their Member ID or First and Surname

#### Available Members:

#### Selected Members:

- Joshua Somerfield

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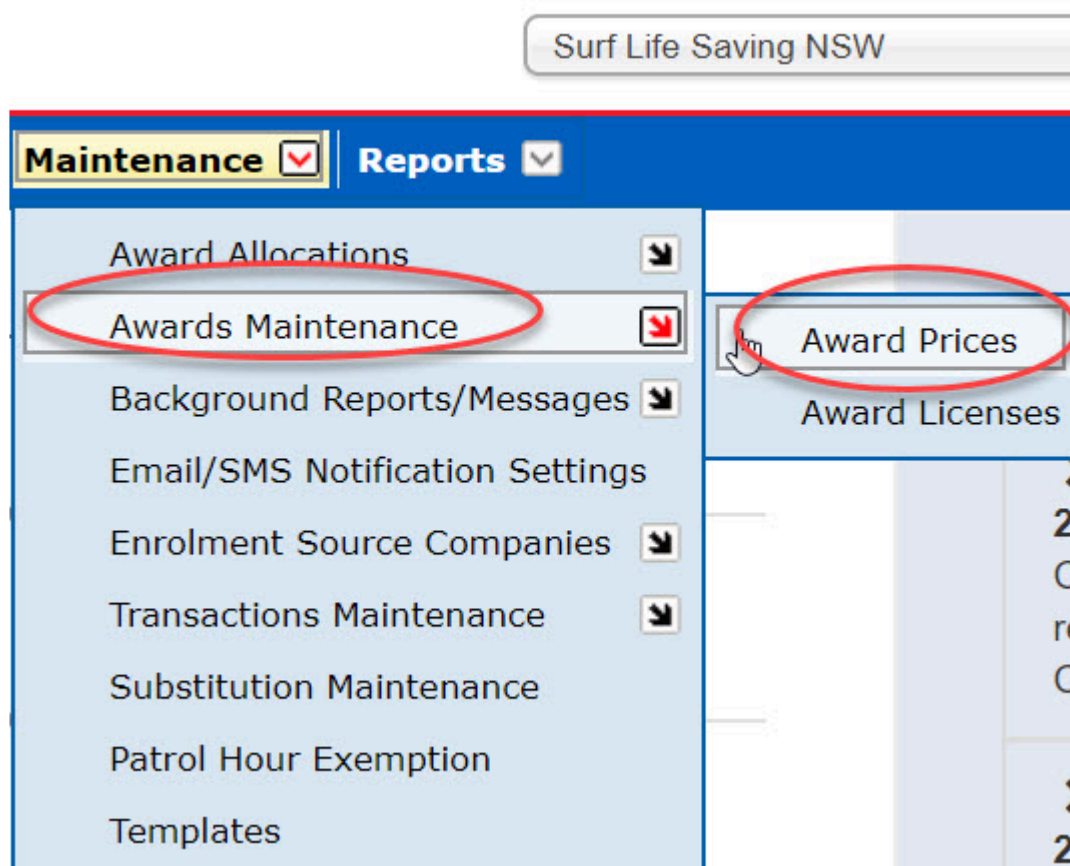
Trainers	
Enter either the Trainer's Member ID or all or part of the Trainer's name before clicking Get Trainer List.	
Search Trainer Member ID:	<input type="text"/>
Search Trainer First Name:	<input type="text"/>
Search Trainer Last Name:	<input type="text"/>
<div> <input type="button" value="Get Trainer List"/> </div>	
<div> <div>Available:</div> <div>Selected:</div> <div> <div> <input type="text"/> </div> <div> <input type="button" value="&gt;"/> <input type="button" value="&lt;"/> </div> <div> <input type="text"/> </div> </div> </div>	
Award Details	
Award Issue Date:	<input type="text" value="16/04/2020"/> <input type="button" value="Calendar"/> (dd/mm/yyyy)
Manual Award Number:	<input type="text"/>
Proficiency Date:	<input type="text" value="16/04/2020"/> <input type="button" value="Calendar"/> (dd/mm/yyyy)
Evaluation Date:	<input type="text" value="16/04/2020"/> <input type="button" value="Calendar"/> (dd/mm/yyyy)
Document Location:	<input type="text"/>
Pool Time:	<input type="text"/> : <input type="text"/> : <input type="text"/> (hrs : mins : secs)
Activity Time:	<input type="text"/> : <input type="text"/> : <input type="text"/> (hrs : mins : secs)
<div> Fill in Award Details as require  These must be filled in otherwise you  will not be able to allocate the award </div>	
SLSA Originating Organisation	
National:	<input type="text" value="Surf Life Saving Australia"/>
State:	<input type="text" value="Surf Life Saving NSW"/>
Branch:	<input type="text" value="Test NSW Branch"/>
Organisation:	<input type="text" value="Test NSW Club"/>
<div> Select Originating Organisation  accordingly </div>	
Enrolment Source Details	
Enrolment Source Type:	<input type="text"/>
Source Company Name:	<input type="text"/>
<div> <input type="button" value="New Company"/> <input type="button" value="Refresh List"/> </div>	
<div> <input type="button" value="Allocate"/> <input type="button" value="Clear"/> <input type="button" value="Cancel"/> </div>	
<div> Once you are completed filling in all the  data click 'Allocate' and the next screen  will advise if the Award has been  successfully allocated </div>	

## Award Maintenance

This area allows State Users to set prices for Awards.

Select **Award Maintenance** from the Maintenance Menu tab and select sub menu **Award Prices**





The screen will display (by default) all awards in the surfguard system allowing States to set a price for each award.

Using the Options keys to view, edit, delete or set new price for an award.

Use the drop down search fields to find a specific award.

Award prices set are State specific.

**SURFGUARD** Surf Life Saving NSW

Summary Members Education Organisational Management Patrols Messages Maintenance Reports Member Search

Award Prices View @ Surf Life Saving NSW

Status: All Award Type: All Award: All

Prices Valid On: 21/05/2020 Format: dd/mm/yyyy (Leave blank to retrieve all prices.) GO

Award Name	Award Type	Price Valid From	Price Valid To	Price	Options
10 Year Age Manager Service Certificate	Service	01/07/2019	30/06/2020	17.20	New Price View Edit Delete
10 Year Assessing Service Certificate	Service	01/07/2019	30/06/2020	17.20	New Price View Edit Delete
10 Year Coaching Service Certificate	Service	01/07/2019	30/06/2020	17.20	New Price View Edit Delete
10 Year Facilitating Service Certificate	Service	01/07/2019	30/06/2020	17.20	New Price View Edit Delete
10 Year Officiating Service Certificate	Service	01/07/2019	30/06/2020	17.20	New Price View Edit Delete
10 Year Training Service Certificate	Service	01/07/2019	30/06/2020	17.20	New Price View Edit Delete
15 Year Age Manager Service Certificate	Service	01/07/2019	30/06/2020	17.20	New Price View Edit Delete
15 Year Assessing Service Certificate	Service	01/07/2019	30/06/2020	17.20	New Price View Edit Delete
15 Year Coaching Service Certificate	Service	01/07/2019	30/06/2020	17.20	New Price View Edit Delete
15 Year Facilitating Service Certificate	Service	01/07/2019	30/06/2020	17.20	New Price View Edit Delete

## Archiving Members registered in clubs for previous season

States Centres can archive members registered in Clubs from previous seasons

Menu > Maintenance > Archive Old Members.

Once the Archiving process is completed an email will be sent to the Surfguard User confirming the total number of members archived and a link to a report displaying all members archived

**Archiving old members of Life Saving Victoria**

Branch: \* Misc VIC Clubs ▾

Organisation: \* Test Vic Club ▾

Seasons: \* 2 or more seasons ago ▾

- Previous season
- 2 seasons ago
- 2 or more seasons ago
- 3 or more seasons ago

**Archiving old members of Life Saving Victoria**

Member ID	Surname	First Name	Organisation	Registered Season	Sub-Membership Category
<a href="#">5465608</a>	famela	tast	Test Vic Club	2019 - 2020	Probationary
<a href="#">5464537</a>	McTaggart	Becca	Test Vic Club	2020 - 2021	Life Member

[Back](#) [Archive members \(2\)](#)

## 10.5 Reports

State Level Reports

License Processing

### License Processing @ Surf Life Saving Australia

Award License:	Bronze Medallion ▼
Output Format:	CSV style (Excel format) ▼

Selection Criteria:	
Reprint License:	<input type="checkbox"/> (Only licenses and member award allocations/proficiencies that have not changed since the last extract.)
State:	All ▼
Branch:	All ▼
Organisation:	All ▼

**Please Note:** The query may time out if branch or organisation is not selected.  
Also, you may accumulate members from different organisations in the Selected Members list until you are ready to process the license.

Retrieve Available Members

Available Members:	Selected Members:
<div>▲</div>	<div>▲</div>

## 10.5.2 – Summary – Blackspot Reports

From the Menu page under the Summary section – select ‘Summary’

Three Blackspot summary reports are available at State/National level which will list the clubs that have recorded the highest number of First Aid, rescue and preventative actions for a specific season.

Blackspot Summary – First Aid

Blackspot Summary – Rescues

Blackspot Summary – Preventative Action

Summary report filtering options include:

Select specific season

Select specific organisation types

Breakdown by Month



**Surf Life Saving NSW Summary Details**

Display: 

Blackspot Summary: First Aid

Assessment Requests  
Awards: By Current Membership Location  
Awards: Originating FROM This State  
**Blackspot Summary: First Aid**  
Blackspot Summary: Preventative Actions  
Blackspot Summary: Rescues  
DEST Report - Printed Certificates/Statements  
Patrol Hours - Organisations  
Patrol Hours - Top Members  
Patrol Stats  
Sub-Membership Categories  
Transfers

Season: 

2022

☐ Breakdown by Month

☒ Include SLS Organisations  
☒ Include Support Operations  
☒ Include Other SLS Organisations  
☐ Include Academies  
☐ Include RTOs  
☐ Include Beach Lifeguards  
☐ Include Lifeguards (Non-ALS)  
☐ Include Pool Lifeguards  
☒ Show organisation detail

Go

## 10.6 Branch and State Officers – ability to submit Forms

---

Officers at a Branch and State level can be granted the ability to Submit forms (in the Members Area) on a Members' behalf and also approve members forms, see the permission checkbox in image below.

## Officer Positions in Surfguard

### Officer Position at Branch level

**Setup Officer @ Sydney Branch**

**Allocate Officer**

Officer Position Name: Administration 2

Club: Clovelly

Officer: \*

From Date: \* 17/05/2023

To Date: \* 31/12/2023

☐ Use alternate email (Optional) for communication for this officer role. If not selected then communication will default to the officer's personal email which is ithelp+3531134@slsa.asn.au

Administrative Functions

☐ Approve Members Area News content

☐ Approve Members Area Library content

☐ SLISA Online Member Store/Shop Administrator

☒ Online Form Submitter

### Officer Position at State level

**Setup Officer @ Surf Life Saving NSW**

**Allocate Officer**

Officer Position Name: Paid Administration 1

Branch: Sydney Branch

Club: Clovelly

Officer: \*

From Date: \* 31/08/2018

To Date: \* 01/07/2023

☐ Use alternate email (Optional) for communication for this officer role. If not selected then communication will default to the officer's personal email which is rcocks@slsa.asn.au

Administrative Functions

☐ Approve Members Area News content

☐ Approve Members Area Library content

☐ SLISA Online Member Store/Shop Administrator

☒ Online Form Submitter & Approver

To assign a Branch or State Officer ensure that you are at your Branch or State organisational level in Surfguard.

Open up the Officer list.

Edit the Officer

Tick the checkbox – 'Online Form Submitter & Approver' (State Level)

Tick the checkbox – 'Online Form Submitter' (Branch Level)

### Submit on Behalf of a Member at Club

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

The screenshot shows the 'Branch Level' interface. At the top left is the Surf Life Saving Australia logo and 'MEMBERS AREA' text. The page title is 'Branch Level'. A navigation bar includes links for Home, Memberships, Patrols, eLearning, News and Events, Document Library, History, Forms, and Sports Hub. The main heading is 'ADD SUBMISSION'. Below it, a 'Submit form' dropdown menu is open, showing options: 'For myself', 'On behalf of a member in Bondi', 'On behalf of a member in Bronte', 'On behalf of a member in Burning Palms', and 'On behalf of a member in Clovelly'.

State level – shows all the clubs in the State

The screenshot shows the 'State Level' interface. At the top left is the Surf Life Saving Australia logo and 'MEMBERS AREA' text. The page title is 'State Level'. A navigation bar includes links for Home, Memberships, Patrols, Nippers, eLearning, News and Events, Document Library, History, Forms, Reports, and Sports Hub. The main heading is 'ADD SUBMISSION'. Below it, a 'Submit form' dropdown menu is open, showing options: 'For myself', 'On behalf of a member in Austinmer', 'On behalf of a member in Avalon Beach', 'On behalf of a member in Avoca Beach', 'On behalf of a member in Ballina Lighthouse and Lismore SLSC', and 'On behalf of a member in Batemans Bay'.

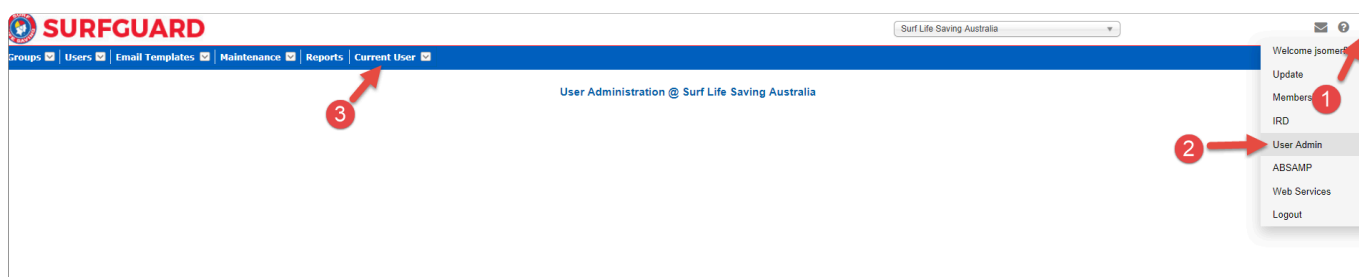
# 11. National Users

The details displayed in SurfGuard are dependent on your level of access. For those who have National level administrative access, a range of different sub-menu options is available. The available view on some screens will also be expanded to include all Club information, and allow you to sort information by Club, Branch, State or National sets.

## 11.1 SurfGuard User Administration

### User Administration

The 'User Admin' function is located beneath the Banner in the Login Details area of your SurfGuard screen. All members have access to their own membership details via the 'Current User' menu item. You can change your contact details or password using this feature.



Certain users have been granted administrator rights within SurfGuard, as indicated by the option being available to you once you have logged on. The details displayed to you as an administrator are dependent on your level of access. If you believe you require higher User Admin access at Club, Branch, State and/or National level, contact the Help Desk.

### Groups

The 'Groups' option allows you to manage the permissions groups that fall within your access level. Groups are listed by Name and can be sorted based on the Environment and Application to which they relate. For example, the SLSA Memberships Group has access to the Production environment and Membership application. This means that the data is live (as opposed to the playpen) and drawn from the membership database.

A number of actions are accessible from this screen. The 'Edit' button allows you to change certain information about the group — such as the name. Specific details about the group can be accessed via the 'View' button. The 'Permissions' button features a list of the different types of areas within SurfGuard that the group can access. Using this function, as an administrator, you can assign read, write, update, delete and grant permissions to the group for all areas within SurfGuard.

**Groups @ Surf Life Saving NSW**

Group Name - From:  To:   
 Environment:  Application:

Group Name	Environment(s)	Application(s)	Actions
Academic Only - Patrol stats Read Only	Production	Memberships	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="View"/> <input type="button" value="Permissions"/>
Mailing Groups and Messaging	Production	Memberships	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="View"/> <input type="button" value="Permissions"/>
NSW - Branch ONLY - Read-Only	Production	Memberships	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="View"/> <input type="button" value="Permissions"/>
NSW Assessments (Rest NO ACCESS)	Production	Memberships	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="View"/> <input type="button" value="Permissions"/>
NSW Assessments (Rest Read Only)	Production	Memberships	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="View"/> <input type="button" value="Permissions"/>
NSW Club ONLY - Full access	Production	Memberships	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="View"/> <input type="button" value="Permissions"/>
NSW Email and SMS Only (rest NO ACCESS)	Production	Memberships	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="View"/> <input type="button" value="Permissions"/>
NSW Email and SMS Only (rest read only)	Production	Memberships	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="View"/> <input type="button" value="Permissions"/>
NSW Full Access (Read Only Patrols)	Production	Memberships	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="View"/> <input type="button" value="Permissions"/>
NSW Gear and Equipment (rest NO ACCESS)	Production	Memberships	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="View"/> <input type="button" value="Permissions"/>

## Users

The 'Users' option allows you to access and update users of the system. You can also add a new user via this menu option. To add a user, you must ensure that all mandatory fields are completed. These are indicated by an asterisk. A number of drop-down menus and tick boxes are also available.

Usually, a user's Main Organisation will be the organisation that they will be using the most within SurfGuard. A user can have access to other organisations as well by selecting them in the 'Available Organisations:' area. A new user must also be assigned permissions to a number of Groups by selecting from the available list. The groups set up previously will determine the access rights that the user has within SurfGuard.

A user remains 'active' from the time they first log in to SurfGuard. If your account has not been accessed for over three months, you will need to send the Help Desk a Form 49 requesting reactivation of the account.

**Add User @ Surf Life Saving NSW**

User Name: \*

User Password: \*

First Name: \*

Surname: \*

Main Organisation: \*

Position:

Phone Number: \*  (include area code)

Mobile Phone:

Email: \*

Force Password Change: ☐

Registered for Newsletter: ☒

Status:

User Account Start Date:  (dd/mm/yyyy)

User Account End Date:  (dd/mm/yyyy)

Send Email: ☒

Email Template:

User Created By:

Please Note: Changing the 'User Created By' will give authority to the selected organisation (and others above it) to manage this user.

**Groups**

Available Groups:

- Academic Only - Patrol stats Read Only
- Mailing Groups and Messaging
- NSW - Branch ONLY - Read-Only
- NSW Assessments (Rest NO ACCESS)
- NSW Assessments (Rest Read Only)
- NSW Club ONLY - Full access
- NSW Email and SMS Only (rest NO ACCESS)
- NSW Email and SMS Only (rest read only)
- NSW Full Access (Read Only Patrols)
- NSW Gear and Equipment (rest NO ACCESS)
- NSW Incidents
- NSW Incidents Administrators

selected Groups:

**Organisations**

State Level:

Branch Level:

Organisation Lowest Level:

Available Organisations:

- Aslings (Lifeguards)
- Austimmer
- Austimmer (Lifeguards)
- Australian Lifeguard Service NSW (Lifeguards)
- Avaton Beach
- Avaton Beach (Lifeguards)
- Avoca (Lifeguards)
- Avoca Beach
- Ballina Lighthouse and Lismore SLSC
- Ballina Shire (Lifeguards)
- Bar Beach Bega (Lifeguards)
- Bar Beach Newcastle (Lifeguards)

selected Organisations:

Academy  
Beach Lifeguards  
Lifeguards (Non-ALS)  
Pool Lifeguards  
RTOs  
SLS Organisations  
Support Operations  
Other SLS Organisations

User Created by: System at: // :  
User Last updated by: System at: // :

## 11.2 Organisational Management

The 'Organisational Management' area allows you to undertake a number of functions, including defining and managing equipment. The 'Manage Gear and Equipment' option allows you to view a listing of all equipment held by the organisation. You can update stock details and add new items by clicking the 'Manage' button and following the prompts on the relevant sequence of screens. You can update stock details and add new items by clicking the 'Manage' button and following the prompts on the relevant sequence of screens.

### Define Gear and Equipment Screen

View Gear & Equipment Definitions @ Surf Life Saving Australia					
Name	Type	Options			
Administration Equipment	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
Beach Vehicle (ATV)	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
Buildings and Structures	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
Club Equipment	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
Competition Equipment	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
Computer and Electrical	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
Defibrillator	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
First Aid Equipment	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
Fuel Cell	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
Inflatable Rescue Equipment	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
IRB	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
IRB Motor	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
JRB	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
Lifejacket	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
Manikin	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
ORB	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
Oxygen Resuscitator	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
Patrol Equipment (Misc)	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
Patrol Uniforms	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
Personal Locator Beacons	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
Radio	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist

The 'Define Gear and Equipment' and 'Define Gear and Equipment Attributes' options allow you to name, describe and assign attributes to new equipment brought into service by any entity of SLSA

### Define Gear and Equipment Attributes Screen

**Gear & Equipment Definition @ Surf Life Saving Australia**

---

Name: \*

Description:

Type:

**Available Attributes:**

- AMSA registration number (Large Text (100 characters); -)
- Board Make (List; -)
- Board Type (List; -)
- BSEF Grant (Boolean (Yes/No); -)
- Colour (List; -)
- Current Gear Inspection Date (Date; -)
- Date of Purchase (Date; -)
- Defibrillator Make (List; -)
- Defibrillator Model (List; -)
- Disabled Access (Boolean (Yes/No); -)

**Selected Attributes:**

- Age in Years (Number; -)
- Amount (Number; -)
- AMSA Registered (Boolean (Yes/No); -)

---

**Checklist Settings**

Inspection Checklist Item: ☒

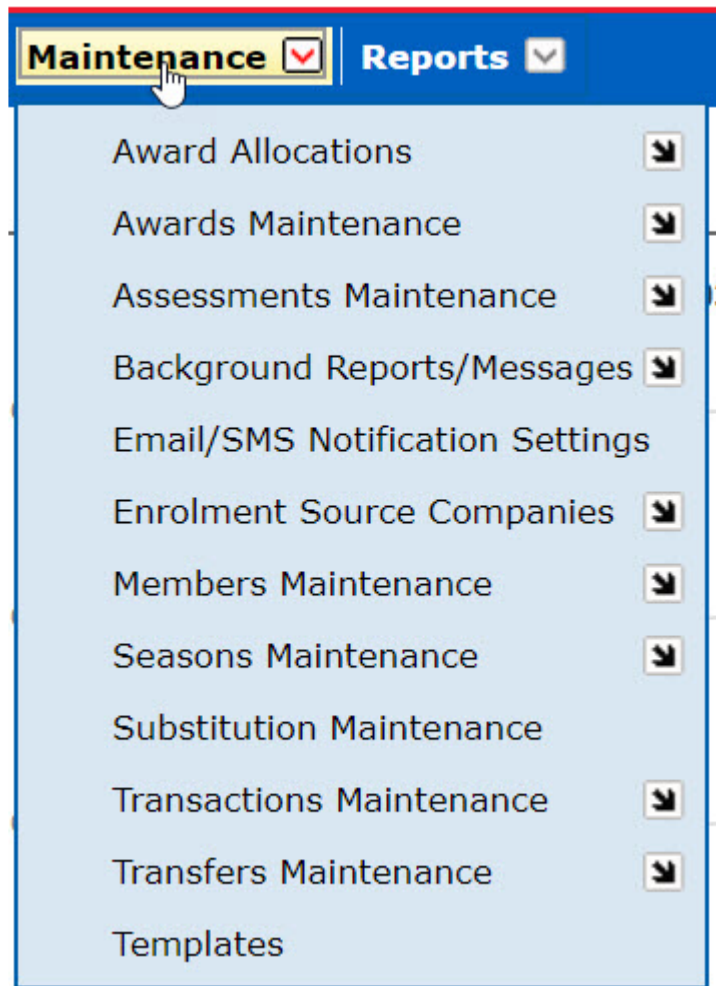
Form Number:

## 11.3 Maintenance

---

National Surfguard users have a number of additional functions located within the Maintenance Menu.

1. Award Allocations
2. Award Maintenance
3. Assessment Maintenance
4. Member Maintenance
5. Season Maintenance
6. Transacton Maintenance
7. Transfer Maintenance



## 11.3.1 Award Allocations

---

National Users may need to manually add an award to a members profile

Go to Maintenance – Award Allocations – Allocate New Awards

Select the 'Allocation Type' Award:

**CR** – Credit

**RCC** – Recognition of Current Competency

**RPL** – Recognition of Prior Learning

Select the 'Award Type'

Select the Member, Assessor, Trainer

Add Manual Award Details

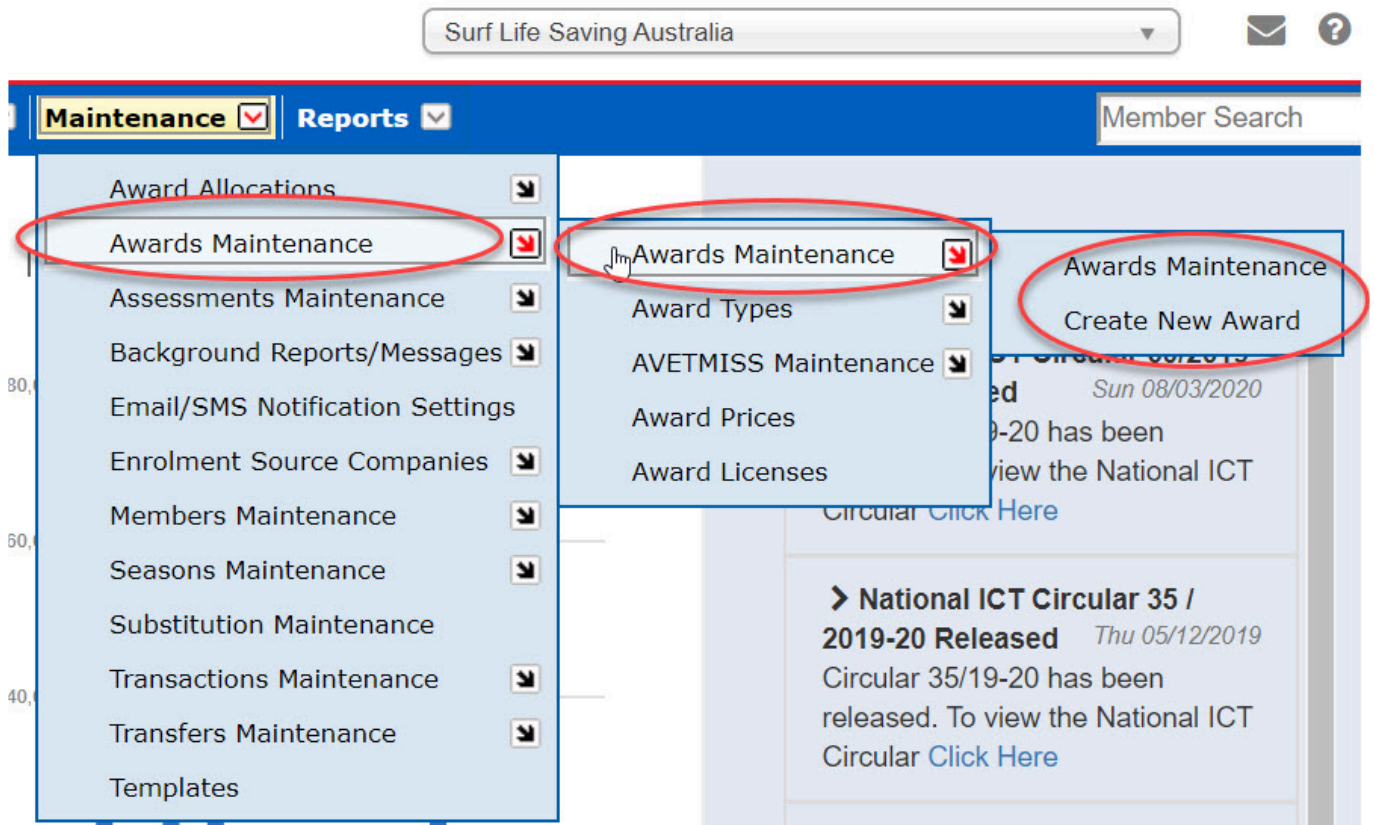
## 11.3.2 Award Maintenance

---

Award Maintenance and its sub menus allows National Users to maintain and create awards.

Only at a National Level can you create a new award.





## Award Maintenance

From the Maintenance Menu – select Award Maintenance

The screen will list (by default) all awards in the Surfguard system.

Using the **Options** available you can view all the details for a specific award, look at the award prereqs also view the prereqs for the award Trainer and Assessor

Members ▾ Education ▾ Organisational Management ▾ Patrols ▾ Messages ▾ Maintenance ▾ Reports ▾ Member Search

Awards Maintenance @ Surf Life Saving Australia

Award Type: All ▾ Status: Active ▾  
Award ID:  Award Name:   
Submit Create New Award

Award Name	Award Type	Options					
10 Year Age Manager Service Certificate	Service	View	Edit	Archive	Prereqs	Assessor Reqs	Trainer Reqs
10 Year Assessing Service Certificate	Service	View	Edit	Archive	Prereqs	Assessor Reqs	Trainer Reqs
10 Year Coaching Service Certificate	Service	View	Edit	Archive	Prereqs	Assessor Reqs	Trainer Reqs
10 Year Facilitating Service Certificate	Service	View	Edit	Archive	Prereqs	Assessor Reqs	Trainer Reqs
10 Year National Patrol Service Award	Service	View	Edit	Archive	Prereqs	Assessor Reqs	Trainer Reqs
10 Year Officiating Service Certificate	Service	View	Edit	Archive	Prereqs	Assessor Reqs	Trainer Reqs
10 Year Training Service Certificate	Service	View	Edit	Archive	Prereqs	Assessor Reqs	Trainer Reqs

## Create New Award

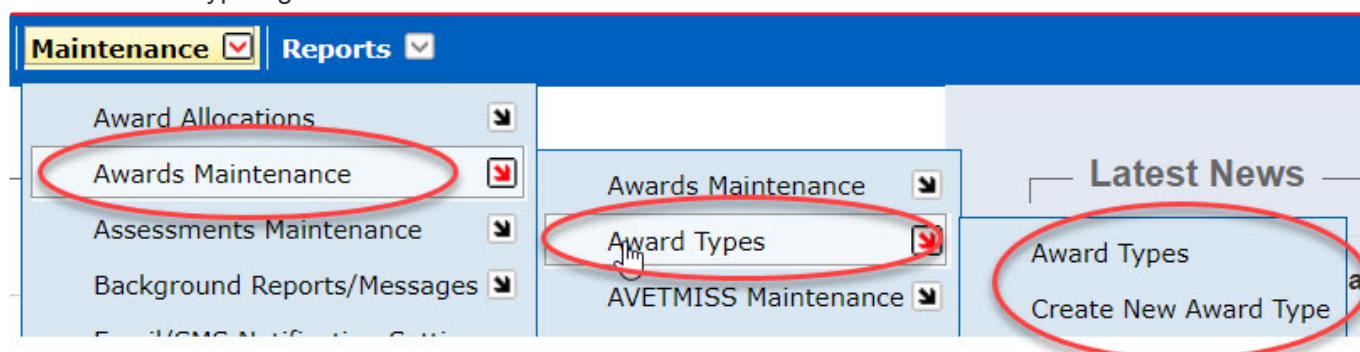
From the Maintenance Menu – select Award Maintenance – Create New Award

Users need to input information pertaining to the award such as – award name, proficiency requirements, set award pre-requisites, set AVETMISS Reporting, identify who can raise and allocate the award, set the Units of Competency, set bulk proficiency dates (if applicable) etc.

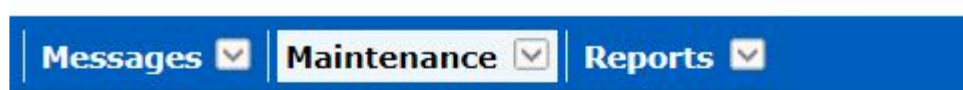
Once all the new award fields are completed – click '**Add Award**'.

## Award Types

The sub menu 'Award Types' (from Maintenance Menu – Award Maintenance) allows National users to set an Award Type against an award



By selecting **Award Types** the screen will list all the Award Types set in the system. Users can view, edit or delete from this screen

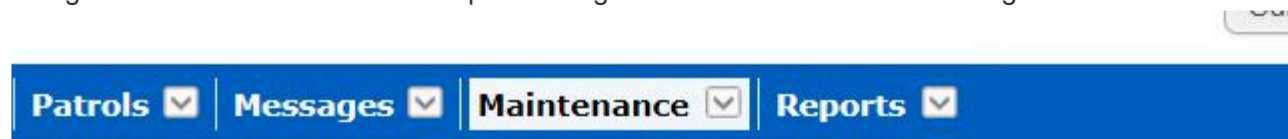


## Award Types View @ Surf Life Saving Australia

Award Type	Options		
AQTF Module	<a href="#">View</a>	<a href="#">Edit</a>	
AQTF Qualification	<a href="#">View</a>	<a href="#">Edit</a>	
AQTF Unit of Competency	<a href="#">View</a>	<a href="#">Edit</a>	
Other	<a href="#">View</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
Recognition	<a href="#">View</a>	<a href="#">Edit</a>	
Service	<a href="#">View</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
SLSA Education	<a href="#">View</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
* System Award Types			
Total: 7			
<a href="#">Create New Award Type</a>			

## 11.3.3 Assessment Maintenance

Assessment Request Status (from the Maintenance Menu – Assessment Maintenance) allows National Users the ability to view or edit all the Assessment Request commands that are displayed in the Surfguard Education Module when processing awards at each level of the organisation.



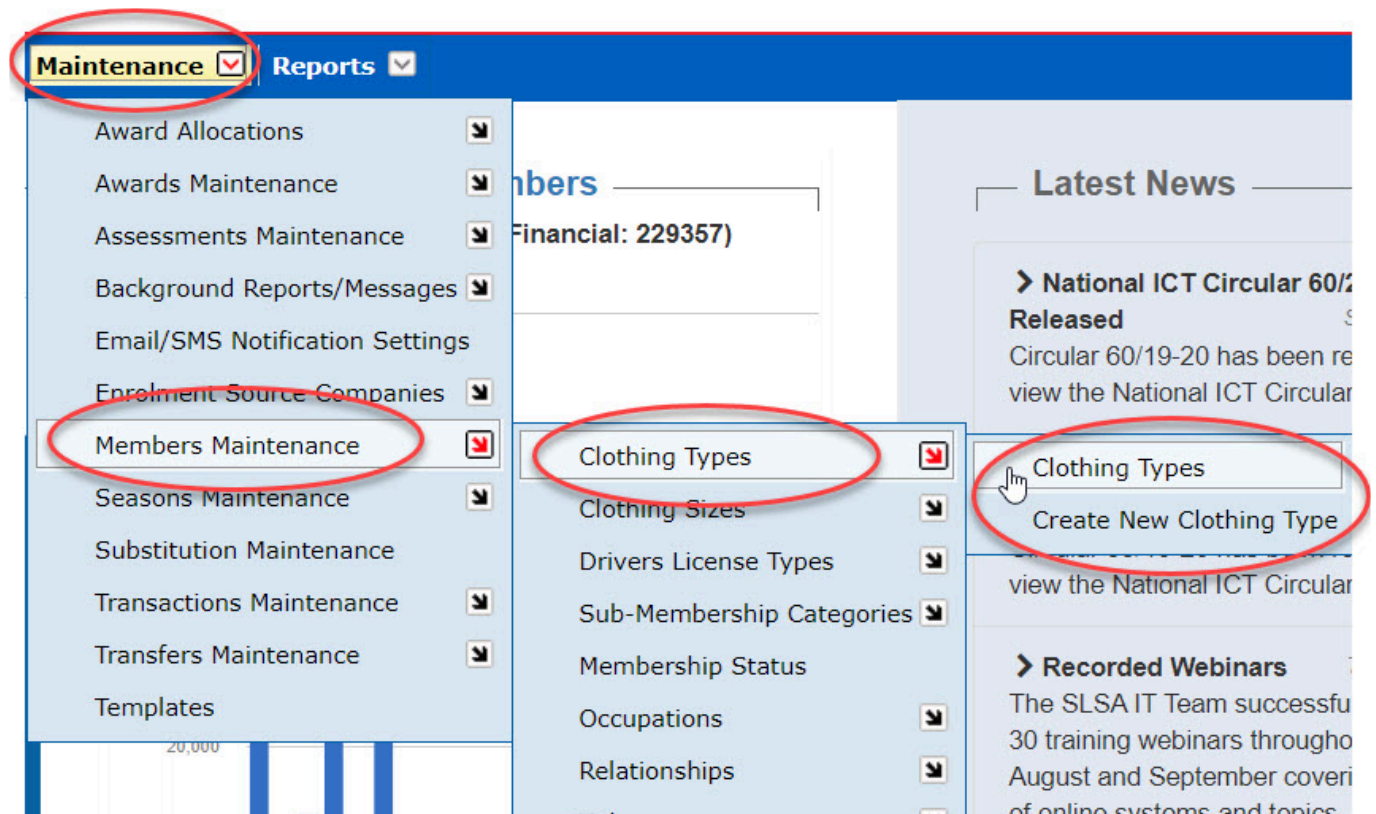
### Assessment Request Status View @ Surf Life Saving Australia

Status	Options
Incomplete	<a href="#">Edit</a>
Awaiting Approval	<a href="#">Edit</a>
Approved	<a href="#">Edit</a>
Deleted	<a href="#">Edit</a>
Rejected	<a href="#">Edit</a>
Awaiting Candidate Approval	<a href="#">Edit</a>
Award Allocation	<a href="#">Edit</a>
Complete	<a href="#">Edit</a>

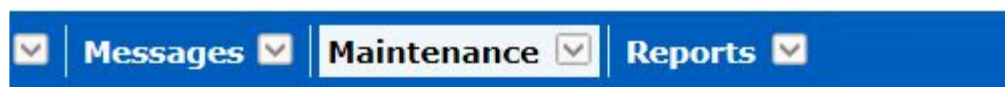
## 11.3.4 Member Maintenance

In the Member Maintenance, a number of sub menus exist for National Users to set the Surfguard parameters for fields that display in a person's membership profile such as clothing types, clothing sizes, sub-membership categories, drivers license information, occupations, titles etc.

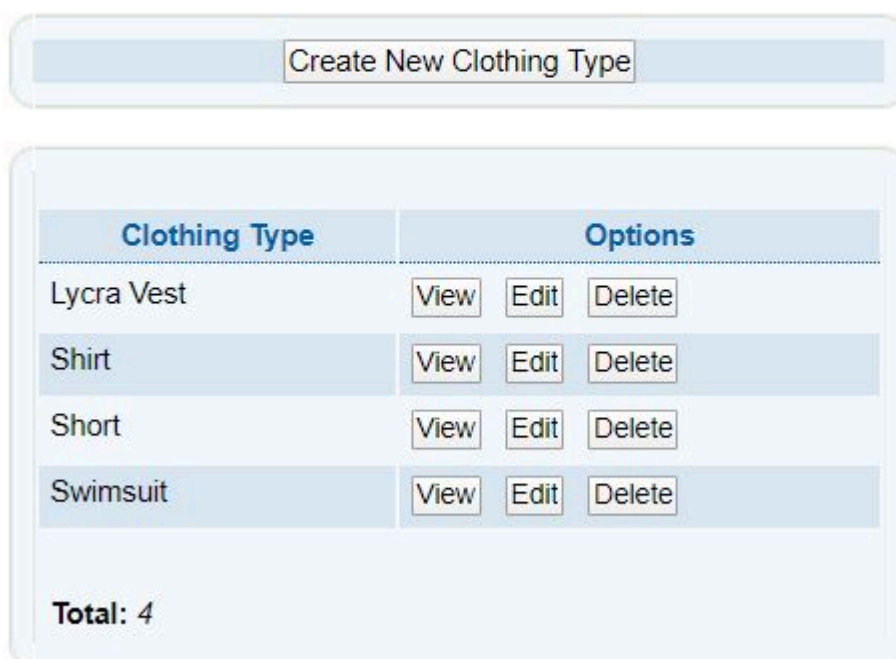
### Members Maintenance – Clothing Types



Currently there are four (4) Clothing Types set up. National Users can edit or add new Clothing Types. Once a new 'Clothing Type' is created this will be displayed in the Members Details View.



## Clothing Types View @ Surf Life Saving Australia





The screenshot shows the Surfguard system interface. On the left, the 'Maintenance' menu is open, with 'Members Maintenance' highlighted. A red circle is drawn around 'Members Maintenance'. To the right, the 'Clothing Sizes' option is also highlighted with a red circle. The 'Latest News' section on the right contains two news items: 'National ICT Circular 60/19-20 Released' and 'National ICT Circular 35 / 2019-20 Released'. Below the news items, there is a section for 'Recorded Webinars'.

**Maintenance** ☒ **Reports** ☒

- Award Allocations
- Awards Maintenance
- Assessments Maintenance
- Background Reports/Messages
- Email/SMS Notification Settings
- Enrolment Source Companies
- Members Maintenance**
- Seasons Maintenance
- Substitution Maintenance
- Transactions Maintenance
- Transfers Maintenance
- Templates

**Members** ☒ **Financial: 229357)**

- Clothing Types
- Clothing Sizes**
- Drivers License Types
- Sub-Membership Categories
- Membership Status
- Occupations
- Relationships
- Titles

**Latest News**

- > National ICT Circular 60/19-20 Released**  
Circular 60/19-20 has been released. View the National ICT Circular [Click here](#)
- > National ICT Circular 35 / 2019-20 Released**  
Circular 35 / 2019-20 has been released. View the National ICT Circular [Click here](#)
- > Recorded Webinars**  
The SLSA IT Team successfully delivered 30 training webinars throughout July, August and September covering a range of online systems and topics. All webinars were recorded and many of these have been recorded and many of these have been recorded and many of these have been recorded.

## Members Maintenance – Drivers License Types

The screenshot shows the Surfguard system interface. On the left, the 'Maintenance' menu is open, with 'Members Maintenance' highlighted. A red circle is drawn around 'Members Maintenance'. To the right, the 'Drivers License Types' option is also highlighted with a red circle. The 'Latest News' section on the right contains two news items: 'National ICT Circular 60/2019-20 Released' and 'National ICT Circular 35 / 2019-20 Released'. Below the news items, there is a section for 'Recorded Webinars'.

**Maintenance** ☒ **Reports** ☒

- Award Allocations
- Awards Maintenance
- Assessments Maintenance
- Background Reports/Messages
- Email/SMS Notification Settings
- Enrolment Source Companies
- Members Maintenance**
- Seasons Maintenance
- Substitution Maintenance
- Transactions Maintenance
- Transfers Maintenance
- Templates

**Members** ☒ **Financial: 229357)**

- Clothing Types
- Clothing Sizes
- Drivers License Types**
- Sub-Membership Categories
- Membership Status
- Occupations
- Relationships
- Titles

**Latest News**

- > National ICT Circular 60/2019-20 Released**  
Circular 60/19-20 has been released. View the National ICT Circular [Click here](#)
- > National ICT Circular 35 / 2019-20 Released**  
Circular 35 / 2019-20 has been released. View the National ICT Circular [Click here](#)
- > Recorded Webinars**  
The SLSA IT Team successfully delivered 30 training webinars throughout July, August and September covering a range of online systems and topics. All webinars were recorded and many of these have been recorded and many of these have been recorded.

## Drivers License Types View @ Surf Life Saving Australia

### Filter Drivers License Types

Drivers License Type From:  Drivers License Type To:

Drivers License Type	Options
Bus	<input type="button" value="View"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Car	<input type="button" value="View"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Motor Cycle	<input type="button" value="View"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
None	<input type="button" value="View"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Truck - Rigid	<input type="button" value="View"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Truck - Semi	<input type="button" value="View"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>

**Total:** 6

## Members Maintenance – Sub-Membership Categories

**Maintenance** ☒
**Reports** ☒

Award Allocations
Awards Maintenance
Assessments Maintenance
Background Reports/Messages
Email/SMS Notification Settings
Enrolment Source Companies
**Members Maintenance**
Seasons Maintenance
Substitution Maintenance
Transactions Maintenance
Transfers Maintenance
Templates

Members
Financial: 229357)

Clothing Types
Clothing Sizes
Drivers License Types
**Sub-Membership Categories**
Membership Status
Occupations
Relationships
Titles

**Latest News**

**> National ICT Circular 60/2019-2020 Released**
Sun 08/03/2020

Circular 60/19-20 has been released. To view the National ICT Circular [Click Here](#)

**> National ICT Circular 35 / 2019-20 Released**
Thu 05/12/2019

Circular 35/19-20 has been released. To view the National ICT Circular [Click Here](#)

**Sub-Membership Categories**

[Create New Sub-Membership Category](#)

30 training webinars throughout July, August and September covering a range of online systems and topics. All webinars

## Members Maintenance – Membership Status

Page 186 of 213

### Membership Status View @ Surf Life Saving Australia

Filter Membership Status

Membership Status Description From:  Membership Status Description To:

Retrieve Membership Status

Status Description	Options
Active	<a href="#">View</a> <a href="#">Edit</a>
Archived	<a href="#">View</a> <a href="#">Edit</a>
Deceased	<a href="#">View</a> <a href="#">Edit</a>
Deleted	<a href="#">View</a> <a href="#">Edit</a>
Expelled	<a href="#">View</a> <a href="#">Edit</a>
Suspended	<a href="#">View</a> <a href="#">Edit</a>
Transferred Out	<a href="#">View</a> <a href="#">Edit</a>
Total: 7	

### Members Maintenance – Occupations

Users can view the Occupations listed in Surfguard by selecting the sub menu 'Members Maintenance – Occupations'

A list will be displayed whereby National users can view, edit or delete an Occupation.

These occupations are available in the surfguard member details section for selection.

<b>Occupation:</b>	SLSA National Office Staff	
<b>Home Address (B</b>	Security	
Building Name :	Security Alarm Engineer	
Flat Or Unit Details:	Security Officer	
Street Number :	Self Employed	
Street Name : *	Service Station Attendant	020
Suburb: *	Sewing Machine Repairs	▼
State: *	Sheet Metal Worker	
Country: *	Shipping Officer	
Returned Mail:	Shoemaker	
<b>Postal Address</b>	Shop Assistant	
<input type="checkbox"/> Same as h	Shop Fitter	
Building Name:	Shop Owner	
Flat Or Unit Details:	Signwriter	020
Street Number .**	SLSA National Office Staff	▼
Street Name:**		
Delivery Postal Box :.**		
Suburb: *		
State: *		
Country: *		
Returned Mail:		

Users can add a new occupation to the list via the 'Members Maintenance – Occupations – Creat New Occupation'.



Patrols ▼ | Messages ▼ | Maintenance ▼ | Reports ▼

### Add Occupation @ Surf Life Saving Australia

Occupation: \*

Add Occupation

Cancel

#### Members Maintenance – Titles & Relationships

Users can view and or create the list of available Titles ie: Mr, Mrs or Relationship selections from this section of the Members Maintenance.

Select the sub-menu and view. Click on the options to edit or delete.

☐ Patrols 
 ☐ Messages 
 ☒ Maintenance 
 ☐ Reports

## Relationships View @ Surf Life Saving Australia

Filter Relationships

Relationship From: 
Relationship To:

Relationship	Options		
Aunt	<input type="button" value="View"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Brother	<input type="button" value="View"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Brother-in-Law	<input type="button" value="View"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Cousin	<input type="button" value="View"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Daughter	<input type="button" value="View"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Daughter-in-Law	<input type="button" value="View"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Defacto	<input type="button" value="View"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Ex-Partner	<input type="button" value="View"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Father	<input type="button" value="View"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Father-in-Law	<input type="button" value="View"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Friend	<input type="button" value="View"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Grandfather	<input type="button" value="View"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

## 11.3.5 Season Maintenance

Season Maintenance – Season

National Users can set organisation date parameters for patrol, competition and registration seasons. Using the filter options to find a specific organisation, National Users can edit or view information.

Organisation	Competition Season	Patrol Season	Registration Season	Options
<b>Surf Life Saving Australia</b>	01/01 - 31/12	01/07 - 30/06	-	<a href="#">View</a> <a href="#">Edit</a>
<b>Surf Life Saving NSW</b> : Surf Life Saving Australia	01/01 - 31/12	01/07 - 30/06	-	<a href="#">View</a> <a href="#">Edit</a>
<b>Sydney Branch</b> : Surf Life Saving NSW : Surf Life Saving Australia	01/01 - 31/12	01/07 - 30/06	-	<a href="#">View</a> <a href="#">Edit</a>
<b>Bondi</b> : Sydney Branch : Surf Life Saving NSW : Surf Life Saving Australia	01/01 - 31/12	01/07 - 30/06	01/07 - 30/06	<a href="#">View</a> <a href="#">Edit</a>
<b>Bronte</b> : Sydney Branch : Surf Life Saving NSW : Surf Life Saving Australia	01/01 - 31/12	01/07 - 30/06	01/07 - 30/06	<a href="#">View</a> <a href="#">Edit</a>
<b>Burning Palms</b> : Sydney Branch : Surf Life Saving NSW : Surf Life Saving Australia	01/01 - 31/12	01/07 - 30/06	01/07 - 30/06	<a href="#">View</a> <a href="#">Edit</a>
<b>Clovelly</b> : Sydney Branch : Surf Life Saving NSW : Surf Life Saving Australia	01/01 - 31/12	01/07 - 30/06	01/07 - 30/06	<a href="#">View</a> <a href="#">Edit</a>

## 11.3.6 Transaction Maintenance

The Transaction Maintenance section allows users to view a list of the default 'Transaction Type Names' that clubs can use to manage their transactions.



## View Transaction Types @ Surf Life Saving Australia

The screenshot shows a table titled 'View Transaction Types @ Surf Life Saving Australia'. The table has two columns: 'Transaction Type Name' and 'Options'. The 'Transaction Type Name' column is highlighted with a red circle, and a red circle with the number '2' is placed next to it. The table lists various transaction types:

Transaction Type Name	Options
Carnival entry fee	
Club key	
Course fee	
Donation	
Function	
Gym fee	
Invoice	
Joining Fee	
Levy	
Locker key	
Membership fee	
Merchandise	
Non fee paying member	
Other	
Special Event	
Training material/manuals	

The screenshot shows a button labeled 'New Transaction Type' at the bottom of the page. The button is highlighted with a red circle, and a red circle with the number '3' is placed next to it.

Users can also 'Create New Transaction Type' by clicking on the 'new transaction' link. Type in the new name for your Transaction Type and click on 'add transaction type'

## Add Transaction Type @ Surf Life Saving Australia

### Transaction Type Details

Transaction Type Name: \*

Users can edit or delete the transaction types that they have created however It's important to remember that you cannot delete a transaction type once members have transactions linked to it



## View Transaction Types @ Surf Life Saving Australia

Transaction Type Name	Options
test transaction	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Carnival entry fee	
Club key	
Course fee	
Donation	
Function	
Gym fee	
Invoice	
Joining Fee	
Levy	
Locker key	
Membership fee	
Merchandise	
Non fee paying member	
Other	
Special Event	
Training material/manuals	

## 11.3.7 Transfer Maintenance

---

### Transfer Maintenance

This section allows National Admin Users the ability to set the Transfer Status/descriptions such as New, Approved, Endorsed, Complete, Rejected, Not-endorsed, Refused, Archive.

Transfer Status View @ Surf Life Saving Australia

Filter Transfer Status

Transfer Status From:

Transfer Status To:

Retrieve Transfer Status

Status Description	Options
Approved	<div>View</div> <div>Edit</div>
Archive	<div>View</div> <div>Edit</div>
Completed	<div>View</div> <div>Edit</div>
Endorsed	<div>View</div> <div>Edit</div>
New	<div>View</div> <div>Edit</div>
Not Endorsed	<div>View</div> <div>Edit</div>
Refused	<div>View</div> <div>Edit</div>
Rejected	<div>View</div> <div>Edit</div>
<div>Total: 8</div>	

Within the Transfer Status View, click on the View or Edit Button to edit action tags relating to each Transfer step.

## View Transfer Status @ Surf Life Saving Australia

<b>Transfer Status:</b>	Approved
<b>Transfer is Active:</b>	[x]

**Action Tags (on buttons/links)**

<b>Action Tag - Next Highest Authority:</b>	Approve
---	---------

<a href="#">Edit Transfer Status</a>	<a href="#">Cancel</a>
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## 12. IRD

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Incident reporting represents the recording of drowning, rescues, first aid etc. Data relating to the incident should be entered as near as possible in timing to the occurrence of the incident. Clubs, Branches and Other Services who require access to the IRD need to apply for access via the SLSA Form 49.

(Form 49 can be found on <https://help.sls.com.au>)

The following incidents need to be entered into the IRD:

- Drowning
- Near Drowning
- Resuscitation
- Member Injury
- Employee Injury
- Major First Aid (Spinal etc.)



Note that this is only SLSA's minimum requirement for data entry and some states may have additional mandatory requirements — check with your state center if you're not sure. Data for other incident types is optional, but we strongly encourage the entry of all incidents, to give us the best possible dataset. Very minor incidents (minor first aid etc) are not required to be entered; however, you can enter them if you choose. States and branches should also pay special attention to entering all incidents resulting from their local carnivals, as well as state and branch championships.

### 12.1 Accessing Incident Database

---

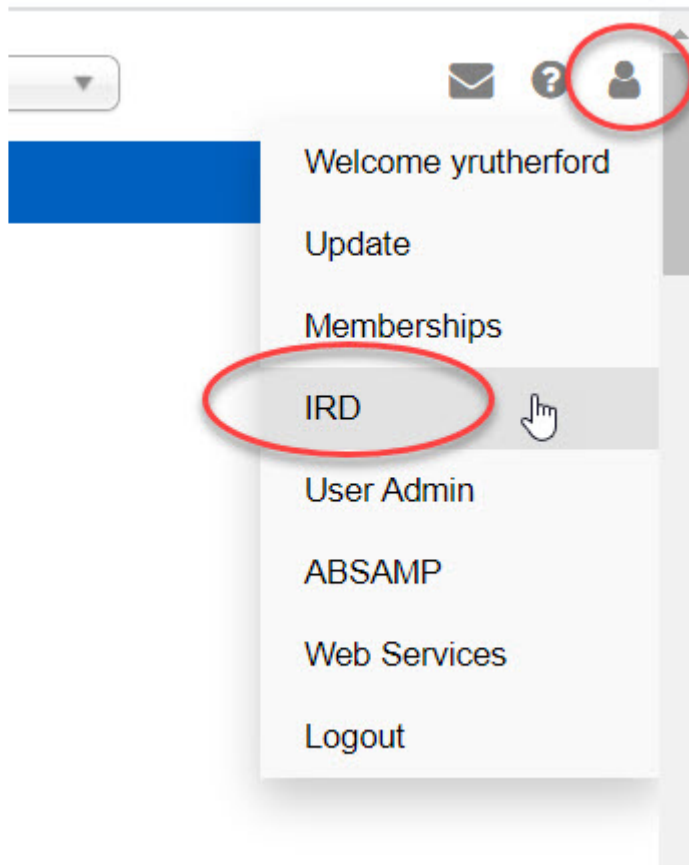
Before attempting to login to the Incident Database you must have a User Account set up on your behalf. This is done by completing the SLSA Form 49.

To access the form, go to <https://help.sls.com.au> – Forms – Form49

You need to log a ticket to the IT Helpdesk with your Form 49 for processing to get access to the Incident Report Database.

[Click Here](#)

Once you have logged on to SurfGuard, change the database name to IRD by selecting it from the Application list (see below).



## 12.2 Incident Reports

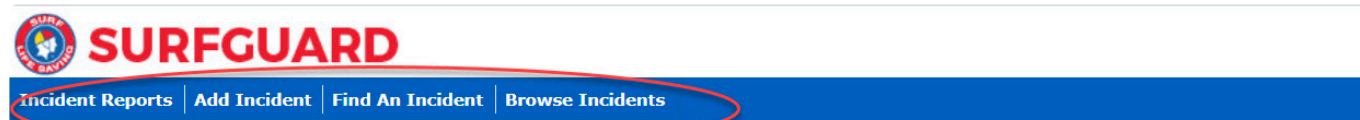
---

Incident reporting represents the recording of drowning, rescues, first aid etc. Data relating to the incident should be entered as near as possible in timing to the occurrence of the incident. The following incidents need to be entered into the IRD:

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Near Drowning  
Resuscitation  
Member Injury  
Employee Injury  
Major First Aid (Spinal etc.)

**Note** that this is only SLSA's minimum requirement for data entry and some states may have additional mandatory requirements — check with your state centre if you're not sure. Data for other incident types is optional, but we strongly encourage the entry of all incidents, to give us the best possible dataset. Very minor incidents (minor first aid etc) are not required to be entered; however you can enter them if you choose. States and branches should also pay special attention to entering all incidents resulting from their local carnivals, as well as state and branch championships. The data entered is based upon the SLSA Incident report form (SLSA F161).

Upon accessing IRD a summary is displayed showing a statistical table of logged IRD reports for the Organisation.



## Incidents Summary @ Surf Life Saving Australia

Incident Summary	
Incident Type	Count
Unique Incidents (including Unknown clubs)	65591
Carnival Incident	778
Major First Aid	12409
Minor First Aid	29137
Major Rescue	2438
S & R	2824
Member Injury	9176
Employee Injury	396
Minor Sting	1673
Major Sting	569
Drowning	1217
Complaint	382
Near Drowning	479
Other	8990

**Note:** All data held within IRD has been collected over nearly 17 years and it is vital that the integrity of the data should be maintained. All data being entered or revised should be checked for accuracy before it is entered.

## 12.3 Add Incident

From the Menu tab – select 'Add Incident'.

The add incident area allows the user to input the required fields by following the order of the paper based Incident Report.

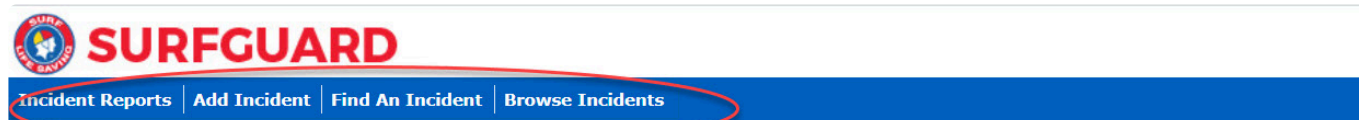
Those fields marked with a red \* are mandatory.

For incidents where resuscitation was required, the CPR/Oxygen/Defib options must be chosen when completing the 'Initial Treatment' area.

This is necessary to allow you to complete the CPR/Oxygen report form.

## 12.4 Find Incident

Using the IRD menu tabs, select 'Find An Incident'



## Incidents Summary @ Surf Life Saving Australia

## Incident Summary

Incident Type	Count
<b>Unique Incidents (including Unknown clubs)</b>	<b>65591</b>
Carnival Incident	778
Major First Aid	12409
Minor First Aid	29137
Major Rescue	2438
S & R	2824
Member Injury	9176
Employee Injury	396
Minor Sting	1673
Major Sting	569
Drowning	1217
Complaint	382
Near Drowning	479
Other	8990

Using the 'Selection Criteria' fields type in any information pertaining to the Incident that you wish to find such as Organisation, Date range or the Incident Number.

Click 'Find Incident'.



## Find an Incident @ Surf Life Saving Australia

Selection Criteria

Club or Service

Surf Life Saving NSW

Exclude Unknown

☐

Period Start:

01/05/2019

(dd/mm/yyyy)

Period End:

01/10/2019

(dd/mm/yyyy)

Incident ID

Incident Type

Any(All)

Carnival Incident

Major First Aid


Minor First Aid

Find Incident(s)

## 12.5 Browse Incident

By clicking on the sub-menu tab – **Browse Incidents** the screen will display a list of all incidents listed for your Organisation.

Users have the options to view an incident by clicking on the Incident number or via the User Options can edit or delete.



**SURFGUARD**

Incident Reports | Add Incident | Find An Incident | **Browse Incidents**

Browse Incidents @ Surf Life Saving Australia

Incident Number	Club	Date	Time(if known)	Location	Incident Type(s)	User Options
86038	Toowoona Bay (Lifeguards)	2020-05-25	16:05:00	TOOWOONA BAY:	Other	Edit Delete
86032	FSC - Duty Officers	2020-05-24	13:30:00	LONG BEACH:	Major First Aid	Edit Delete
86033	FNC - Duty Officers	2020-05-24	14:00:00	CABARITA:	S & R	Edit Delete
86034	Freshwater	2020-05-24	17:18:00	FRESHWATER HEADLAND:	Other	Edit Delete
86037	SNB - Duty Officers	2020-05-24	16:08:00	FRESHWATER:	Other	Edit Delete
86028	Westpac Helicopter - Sydney Region	2020-05-23	12:05:00	DOBROVD HEAD:	S & R	Edit Delete
86029	Trigg Beach (Lifeguards)	2020-05-23	07:55:00	BROKEN LEG:	Minor First Aid	Edit Delete
86030	Umina	2020-05-23	16:18:00	PEARL BEACH:	Other	Edit Delete
86035	HUN - Duty Officers	2020-05-23	10:33:00	SHOAL BAY WHARF:	Other	Edit Delete
86036	HUN - Duty Officers	2020-05-23	09:32:00	FLY POINT:	Other	Edit Delete
86023	Newport	2020-05-22	11:28:00	NEWPORT BEACH:	Other	Edit Delete

## 13. ABSAMP

The Australian Beach Safety & Management Program (ABSAMP) was established in 1990 as a joint program between SLSA and the Coastal Studies Unit, University of Sydney.

ABSAMP is an ambitious project that aims to be the most comprehensive study ever undertaken on the beaches of any part of the world's coast. Detailed information on every beach in Australia has been amassed.

The main aims of the program are to:

- Develop a comprehensive, standardised and scientific information base on all Australian beaches with regard to their location, physical characteristics, access, facilities, usage, rescues, physical and biological hazards, and level of public risk under the various wave, tide and weather conditions.
- Expand and improve the management and safety services of all Australian beaches, and to assist other countries to develop similar programs

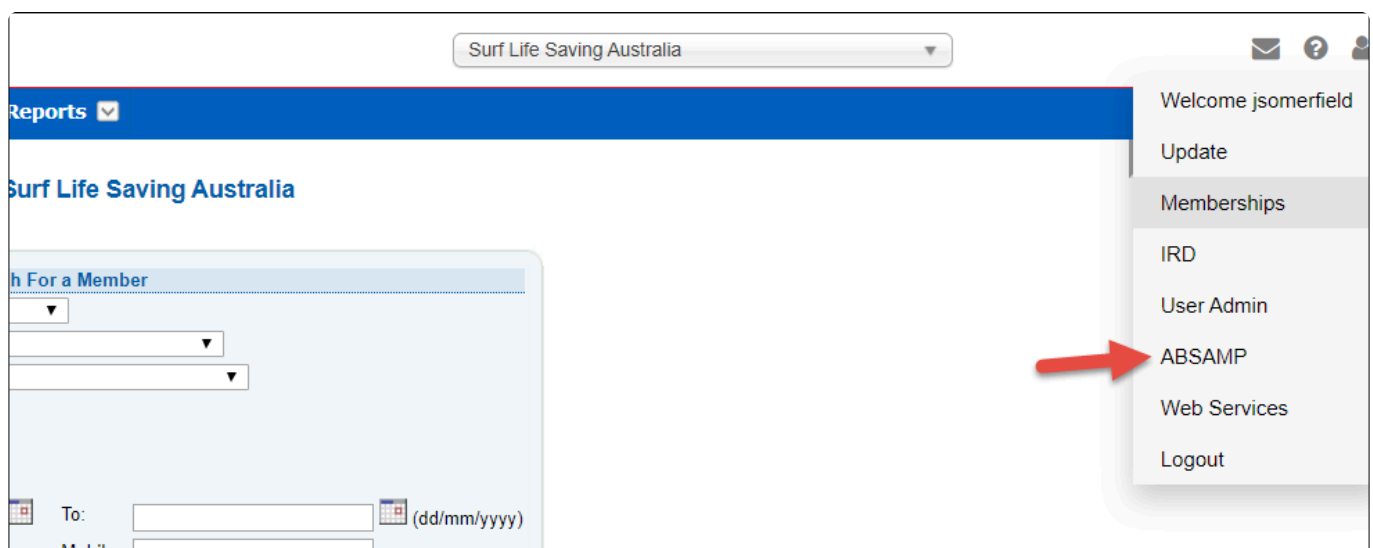
Data on each beach is acquired from a range of interrelated sources: topographic maps and aerial photographs, aerial and ground site inspections, beach conditions (produced on a daily basis by patrolling surf lifesavers filling in beach maps) and published data. All information is filed as a hard copy and all appropriate information then extracted for entry into the database.

### 13.1 Accessing ABSAMP

The ABSAMP database can be accessible in SurfGuard by selecting "ABSAMP" from the application list.



To access the ABSAMP tab within SurfGuard you need to fill in a Form 49 and have this form authorised.



## 13.2 Data Integrity

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All data held within ABSAMP has been collected over nearly 20 years and it is vital that the integrity of the data should be maintained. All data being entered or revised should be checked for accuracy before it is entered. No data should be deleted without the approval of the Coastsafe Manager.

All data held within the ABSAMP database is owned by SLISA. No data, image or map should be passed on to a third party for research or commercial use without the permission of the Coastsafe Manager.

## 13.3 Data Access Policy

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### **Responsibility**

It is the responsibility of SLISA, through the National Manager Coastal Safety Services, to implement and maintain procedures to effectively manage and provide necessary access to ABSAMP Data, while at the same time ensuring the confidentiality, integrity, availability, accountability, and auditability of the information.

### **Use**

Any individual granted access to ABSAMP Data is responsible for the ethical usage of that data. It will be used only in accordance with the authority delegated to the individual to conduct SLISA operations.

### **Data Access**

The Responsible Officers will coordinate ABSAMP Data access nationally and for each SLISA State/Territory. The Responsible Officers will maintain records of Approved ABSAMP Data Users, and serve as contact point for ABSAMP enquiries

### **Compliance**

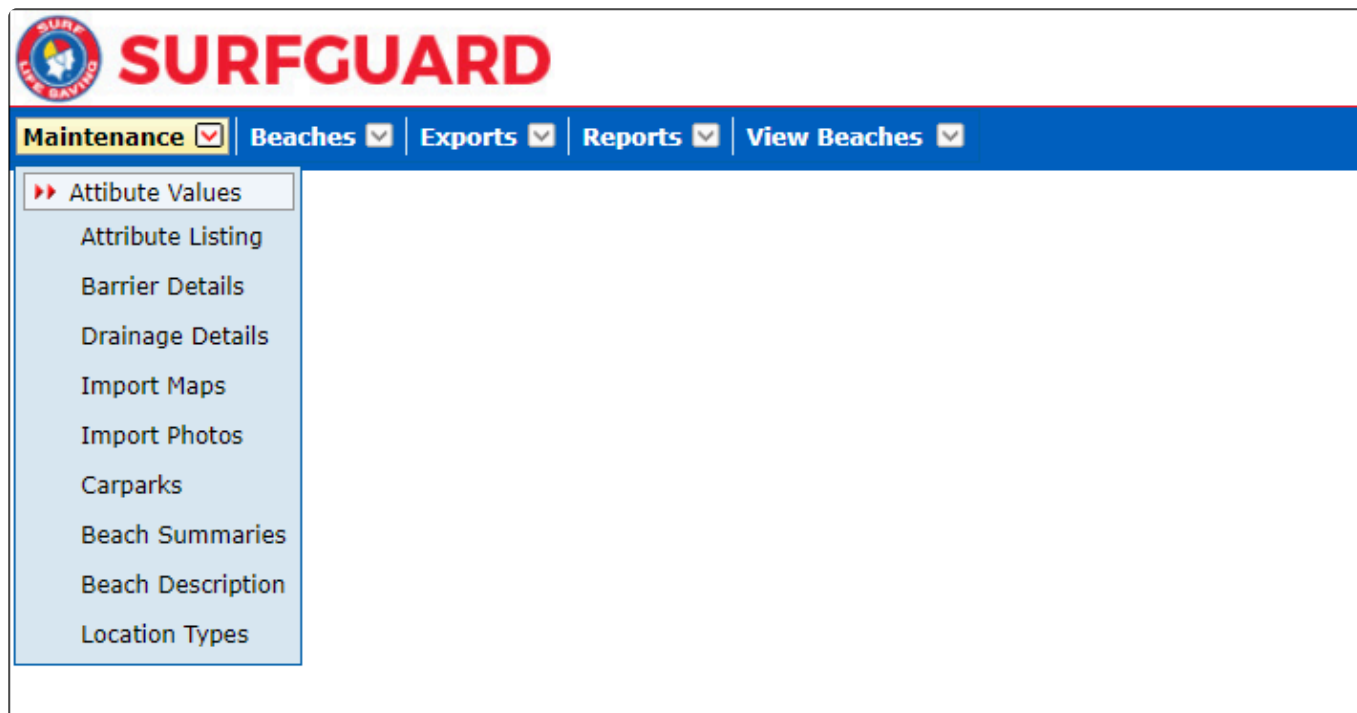
Approved ABSAMP Data Users are expected to observe any restrictions that apply to sensitive data; and to abide by applicable laws, policies, procedures and guidelines with respect to access, use, or disclosure of information.

The unauthorised storage, disclosure or distribution of ABSAMP Data in any medium, except as required by an employee's job responsibilities is expressly forbidden, as is the access or use of any ABSAMP Data for one's own personal gain or profit, for the personal gain or profit of others, or to satisfy one's personal curiosity or that of others

## 13.4 Maintenance

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The maintenance functions are managed via the 'maintenance' menu. From this menu the parameters relating to a field or a file can be added, changed or removed.



## 13.5 Attribute Values

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Attribute values allow the Administrator to add a new attribute and to sequence the attribute (order) so that it appears on the screen in the correct place. Click the 'Modify' button to change the sequence of an attribute.



## ABSAMP Attribute Maintenance

**Total Attributes for this Type: 34**

**Attribute Type:** Activities (AC) ▼

**Explanation:** Possible activities available at a beach

**Attributes List**

**Attribute:**

**Sequence:**  New Attribute

Attribute Name	Display Sequence	Action
Swimming	1	<a href="#">Modify</a>
Board riding	2	<a href="#">Modify</a>
Wind surfing	3	<a href="#">Modify</a>
Kite surfing	4	<a href="#">Modify</a>
PWCs	5	<a href="#">Modify</a>
Recreational boating	6	<a href="#">Modify</a>
Commercial boating	7	<a href="#">Modify</a>
Aquaculture	8	<a href="#">Modify</a>
Snorkelling	9	<a href="#">Modify</a>
SCUBA	10	<a href="#">Modify</a>
Beach fishing	11	<a href="#">Modify</a>
Rock fishing	12	<a href="#">Modify</a>
Jetty fishing	13	<a href="#">Modify</a>
Spear fishing	14	<a href="#">Modify</a>
Rock walking	15	<a href="#">Modify</a>
Jogging	16	<a href="#">Modify</a>
Cycling	17	<a href="#">Modify</a>
Rollerblade	18	<a href="#">Modify</a>
Skateboard	19	<a href="#">Modify</a>
Dog walking	20	<a href="#">Modify</a>
Volleyball	21	<a href="#">Modify</a>
4WD	22	<a href="#">Modify</a>
Other	23	<a href="#">Modify</a>
Personal Training	24	<a href="#">Modify</a>

## 13.6 Attribute Listing

The attribute listing generates a report that lists all fields and their attributes. To create the report click the generate button. The output will show the list of attributes for each area of ABSAMP.

## 13.7 Beach Barrier

The Beach Barrier maintenance screen allows a user to Find, delete or add a new barrier and to change

the characteristic of a barrier type. Click the relevant button to perform this task.

ABSAMP Beach Barrier Maintenance

Total Number of barriers: 2693

Barrier Key:

Barrier Name:

State:

Island:

Holocene: ☒ Pleistocene: ☐

Back barrier saltflats width (m):

Vegetation:   
Barrier Type:   
Barrier Usage:   
Back Barrier Type:   
Comments:

**Barrier Characteristics**  
Barrier Characteristics:  Value:

Barrier Characteristics	Value	Action
Orientation (deg)	51.00	<input type="button" value="Delete"/>
Minimum width (?)	100.00	<input type="button" value="Delete"/>
Maximum width (?)	250.00	<input type="button" value="Delete"/>
Length (?)	0.63	<input type="button" value="Delete"/>
Total area (?)	0.75	<input type="button" value="Delete"/>
Stable area (?)	0.75	<input type="button" value="Delete"/>
Mean height (?)	5.00	<input type="button" value="Delete"/>
Maximum height (?)	10.00	<input type="button" value="Delete"/>

## 13.8 Beach Drainage

The beach Drainage maintenance allows a user to Find, Delete or Create a beach drainage attribute for a particular key. Click the relevant button to use this functionality.

**ABSAMP Beach Drainage Maintenance**

Drainage Key:

Drainage Name:

Total number of Drainages: 2501

State:

Drainage Type:

Estuary Type:

Intel Name:

Intel Stability:

Intel Mouth:

Drainage Trained: ☒

On Headland: ☐

Lagoon: ☐

Comments:

Island:

Wetland Area (Ha):

Estuary Maturity:

Intel Width (m):

Intel Depth (m):

Lagoon Name:

## 13.9 Import Maps

This feature will allow the user to import a map as an image into ABSAMP and connect it to a particular beach. To perform this function, enter the map reference information and the map type. Click the Browse button and browse to where the file location of the map is stored and select it. The map image should appear once the map has been uploaded.

**ABSAMP Beach Map Maintenance**

Map Code:

Reference No.:

Reference Name:

Map Type:


Scale: 1 :

Map Date:

(dd/mm/yyyy)

Description:

File Name:  No file chosen



Total number of maps: 0

## 13.10 Adding and Deleting Photos

### Adding Photos

**NOTE:** Photos can only be uploaded if they have a minimum width of 700 and a maximum of 1300. The ideal width is 1000. If the new image has to be resized open the image up in “paint”. When you have it opened in Paint

1. click Resize
2. tick the Pixels also
3. tick Maintain aspect ratio.
4. Change the Horizontal to 1000 and
5. click OK.

#### Step 1 – Uploading A Photo in ABSAMP

1. Click Maintenance > Import Photos (the most recent photo will appear)
2. Click “New Photo” (Failing to do this will replace the “current” photo if you save)
3. Click “Choose File”, update the details (Typical settings are Photo Type : Ground, Scale 1:1, current date)

4. Click "Save"

## Step 2 – Attaching a Photo to a Beach to Display in Beachsafe

1. Click "Beaches" from the main menu
2. Click "General Details"
3. Clear the Beach Key and Beach Name (they both default to "delete") and type your Beach key into the Beach Key field, click "Find Beach". Use caution using "Beach Name to "search" as duplicate beach names do exist (e.g. Sorrento WA vs Sorrento Vic).
4. On the lower right-hand side of the page, click "Attach Photos"
5. Click "View New Photos" then click "Select Photo". Uses the drop-down arrow, the photos are named images/yyyy-mm-dd followed by a timestamp and the original file name.
6. Display Sequence: If you only have one photo for that beach, put in 1; if you have more than one photo for that beach, update "Display Sequence" with the sequence number for that photo (e.g. 3).
7. Click Attach Photo
8. Once you have uploaded new photos they either update overnight or if it is urgent you can [log a support ticket](#) with the SLSA IT Helpdesk including the name of the beach & beach key and we can do a forced update.

ABSAMP Beach Photo Maintenance

Item has been successfully updated.

Photo Code:

Reference No.:

Photo Type:

Scale: 1 :


Photo Date:

(dd/mm/yyyy)

Description:

No. of Photos loaded: 14917

File Name:  No file chosen



## Deleting Photos from a Beach

The following steps will enable you to remove photos from a beach

1. Click on the “Beaches” tab in the drop-down select “General Details”
2. Enter the beach key or beach name and click Find Beach
3. Scroll down to the bottom and on Right Hand Side (RHS) click “Attach Photo”
4. From the “Select Photo” drop-down find the photo you don’t want
5. Scroll down to the bottom and select “Detach Photo”

## 13.11 Beach Summaries

The beach summary maintenance area will allow the user to display, update, delete and create summary descriptions. Click the appropriate box to achieve this.

These summaries relate to swimming, surfing, fishing, and general.

**ABSAMP Summaries Sets Maintenance**

No. of Summaries Sets defined: 0

Set Name:

Update Summaries Name

Swimming:

Surfing:

Fishing:

General:

Delete Summaries

New Summaries

Save

Cancel

## 13.12 Beach Description

The beach description maintenance area will allow the user to display, update, delete and create beach descriptions. Click the appropriate box to achieve this.

ABSAMP Beach Description Maintenance

No. of Beach Descriptions defined: 1

**Description Name:** Lake Cathie Intro ▼

**Description:** South of Lake Cathie entrance the beach (NSW 173) continues due south-southwest for 1.9 km to the low Middle Rock Point, a collection of rocks that causes a slight protrusion in the sandy beach. Lake Cathie settlement follows the back of the beach providing continuous access. In addition there is a grassy park and picnic area on the south shore of the lake entrance and a car park behind Middle Rock Point, which also provides 4WD access to the next beach south. The beach receives waves averaging 1.6 m and with the fine beach sand maintain a well-developed double bar system. The inner bar is usually attached and cut by rips every 300-400 m, with a deep trough and outer bar further out. A permanent rip runs out against Middle Rock Point, and when the lake is open strong tidal currents sweep the entrance.

Update Description Name

Delete Description
New Description
Save
Cancel

## 13.13 Beaches

The beaches area of ABSAMP is where all detail is held on a particular beach.

To search for beach information delete the beach key and beach name and enter your known information. This information will be reused when you click other beaches functions.

**Note:** When adding a new beach you will need to create the beach and then in the MAINTENANCE area create the summaries, carparks and other features and attach them to this beach.

## 13.14 Exports

The export function allows users to select any number of combinations of fields and export them as a variety of outputs.

Each area is expandable by clicking the relevant button as shown below.

Name the report and once the export file is created, select the location where it is to be saved.

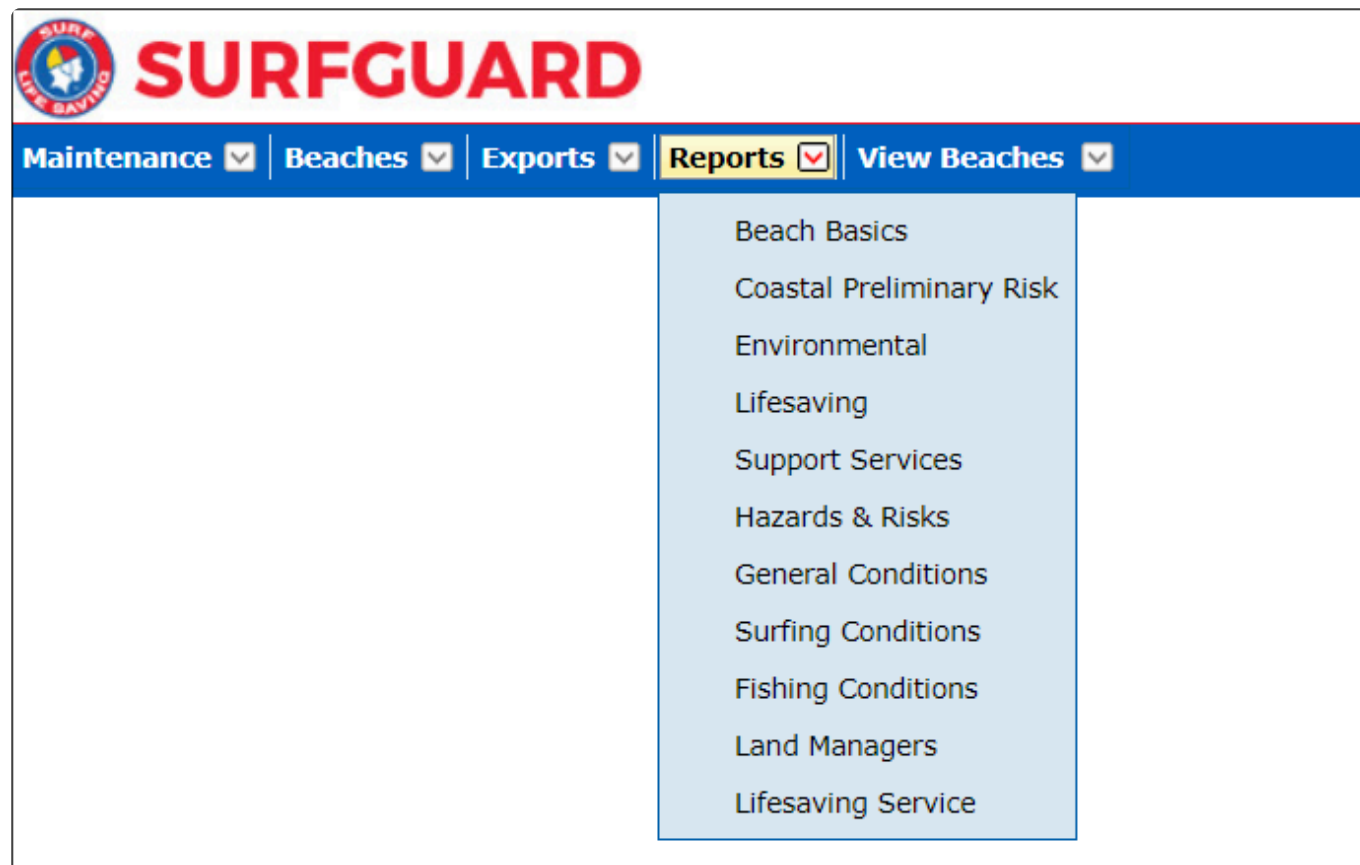


**Note:** Permission must be sought before any exported information is used by any person other than SLSA staff.

## 13.15 Reports

The reports area allows users to run a series of pre-setup reports and display them to a screen for printing.

Reports selection shows the list of reports.



## 13.16 Adding a beach

---

Go to ABSAMP in surfguard

Go to 'general details' sub menu item under the 'Beaches' menu.

Click 'new beach' (located bottom left of screen)

Add basic information such as name, state, location type and GPS info

Hit 'Save'.

After doing this then it will auto assign a beach key to it, you can change this if need be and hit save again



Surfguardapp.sls.com.au/SLSA\_ABSAMP/modules/Beaches/BeachMaint.php

**SURFGUARD**

Beaches | General Details | Reports | View Beaches

**ABSAMP Beaches - General Details**

Beach Key:  Beach Name:  Total number of beaches: 12399

State:  Branch:

Location Details:  
Island Name:  Is Section of Larger Beach:   
Coastal Type:

Location Type:  Location Sub Type:

Lifeguarding:  
Surf Club:  Select Surf Club:  Surf Club On Beach:   
Patrol Type:

Description:  
  
Attach Description:

Measurements:  
Length (m):  0.00  
Mean Width (m):  0.00  
Orientation:  0.00  
Embayment/isation:  0.00  
Back Beach Mean Width (m):  0.00

Local Names:  
Enter new local name:

Public Transport:  
Select new Transport:

Latitude:  
Decimal degrees:  -33.82020

Longitude:  
Decimal degrees:  151.88320

Hazard Ratings:  
High Tide:  0.00 Low Tide:  0.00  
Physical:  0.00 Overall:  0.00

Tidal Reefs:  
☒ Intertidal Reef - Ratio (%):  0.00  
☒ Sub-tidal Reef - Ratio (%):  0.00

Fencing:  
☐ Dune Fencing - No. of Entrances:  0.00

Comments:

Attach Summary:  
  
  
  
 [See Map](#)

Created: 2018-12-05 10:47:10 199184 Updated: 2019-01-07 17:10:35 34874

[https://surfguardapp.sls.com.au/SLSA\\_ABSAMP/modules/Beaches/BeachMaint.php](https://surfguardapp.sls.com.au/SLSA_ABSAMP/modules/Beaches/BeachMaint.php)