



Scouts

Dorset

Support for Line Managers

Volunteer's Journey

New Volunteers and Change of Roles



Overview of Steps to be carried out by the line manager

1. Have initial discussion with the volunteer; about the role, Scout policies and any training requirements. If the role holds a minimum of Associate membership, discuss if the individual wants to be a full Member and make their promise. If they opt to be a full Member, please email the Appointments Secretary who must record this.
 - Associate members do not make the promise, may opt to wear uniform, and may not wear the World Membership badge (POR 3.1.r-u)
 - Foreign residents in the UK will need the approval of the DC/CC to become members of the UK TSA (POR 3.1.d)
2. Once the volunteer decides to proceed, find out if they're happy to do the applications alongside you whilst you're online, or if they prefer to use paper forms to collect the information.

If the volunteer is happy to do this online:

- Schedule a meeting with them where you can be online
- Tell them [what ID documents](#) they will need
- Tell them to bring their NI number and addresses for the last 5 years.
- Ask them to read the declaration on the [Adult Information form](#) as they will need to give you verbal consent before you do the applications online
- Tell them to bring the name and email address (or paper address if no email address) of two referees

If the volunteer wishes to use paper forms:

- Provide them with an Adult Information Form and an [ID Check form](#)
- Ask them to return them to you and show the relevant id documents

3. Provide them with:
 - Appointments Introduction [document](#), either online in an email or printed
 - Getting Started [introduction](#), requesting them to start this training (unless this is done by your LTM)
 - Yellow card, Purple Card, relevant White Card and Green card (unless this is done by your local AAP)
4. Add the person/role to [Compass](#)
5. Do the DBS application on [Atlantic](#)
6. Destroy any paper forms
7. The Appointments Secretary and the Local Training Manager will be prompted by emails to process the approval and support the new volunteer with their training. If there is anything either of them need to know (eg. additional need, referees not ready), please contact them.
8. Agree an [induction plan](#) with the volunteer
9. Once the role has been approved, you will be emailed by the Appointments Secretary. The volunteer will be emailed too and given their membership number and how they can login to Compass.
10. Once the role is Full, only the volunteer is emailed by Compass. You will need to monitor this as this is the point at which those becoming a full member may be invested.

Compass, DBS and Referees notes

Overview of this part of the process

- Do not proceed until you have consent from the adult. You make the Compass additions/changes. IT IS HIGHLY ADVISED you do this whilst they are with you and you immediately do the DBS
 - Add the person as required
 - Add the new role
 - Request a disclosure if required
 - Complete the referees details if required
- The appointment secretary gets emailed by Compass to say it's done and will pick this up to take it through the appointment process.

What can you add/change?

- Only roles at your level in the role hierarchy and below. OHs need to be added by Group roles, either GSL or Group Admins. You can give the role Group Admin to someone who this task is delegated to eg a secretary. Or the equivalent for District.
- You can add people before they are 18 years old but once you leave the record, you will not be able to access it until they are 18 years old. This could be used to get a DBS done early (no more than 6 months) which could be useful for a camp just after their birthday (if they become 18 whilst away, they are considered a youth member for the duration). Have everything ready as you will need to add the person, the role and proceed to the DBS application in one go. You could leave the referees and approval process until later.

How do I do it?

Watch the [video from TSA](#) to add person and/or roles BUT READ notes below first so you can look out for the right points.

The video does not include inputting the referees and DBS. On the video, at 4 mins 27 secs, it says click save. Before you do so:

- Referees
 - Click the Referees option on the left. Only complete the Referees' name and email address and watch for typos. Save afterwards. Do NOT request them yourself as this must be done by the appointments secretary.
- DBS
 - To get the DBS application into Atlantic, you have to request it. Click the Approval option on the left.
 - Click 'Request new disclosure'.
 - On the next screen, confirm it again and Click 'Request new disclosure'.
 - A new tab will open for you to login into Atlantic. Login or it will NOT get pushed from Compass to Atlantic. Once you're logged in and see the option screen, it is now in Atlantic and you can proceed or if necessary (not advised), logout.
- Save
 - Click Save at bottom right

Tips and Guidance

Member's name

- This needs to be the legal name to ensure the DBS processes ok
- Type the name and title correctly as this cannot be changed afterwards:
 - Type the name with uppercase where relevant
 - Include middle names and ensure the first name is the full name. eg. Matthew not Matt (assuming their formal name is Matthew)

Personal Details

- 'Known as' will default to their first Forename unless you add something eg. Matt
- Ethnicity and religion, do not complete these, ask the person to do it so you stay GDPR-compliant. If you ever find yourself on a page that insists you complete them (mandatory field), there is a 'Prefer not to say' so you can use these selections.
- Date of joining - you can add a date in the future which may be right or may be a typo so take care.
- Honours, occupation etc are not needed so leave these to the person if they wish to complete them.
- Phone numbers must include the code and no spaces
- Email is a must for DBS so please include unless they don't have one (in which case enter hasnoemail@nowt.com)

Roles in general

- When looking for the role in the dropdowns, remember OH is a group/district role not a section role.
- PLEASE add section assistants to the section not the Group
- PLEASE always set variant for leader and assistant leader roles as it helps the reports
- Take care with the 'Start date' so that it fairly reflects their involvement as it is the date they accrue service from. If they started a while ago and you've only just got round to adding them, the 30 days to get the DBS done will start from today not from the role 'Start date'.

New or extra Roles

- If the person is going from OH to an appointment, whether that's an exec role, leader role or manager role, ONCE you've added the new role, PLEASE close the OH role. (When running reports, OHs are often excluded and an appointed person may get excluded in error if they still also hold the OH role.)
- If the person is changing their role. eg. ASL to SL, PLEASE don't use the Replace role option. This means the old role is held open until the new role gets to Full status which can take up to 5 months. It just confuses all the reports and searches.

Approval Process page

- A line manager whose role is not yet full cannot be selected nor the DESC which is a glitch
- Approval options - unless you are the appointments secretary, the only one available to you will be 'Request new disclosure'. If you have added a role that requires your Committee/Council approval, you will need to ask the Appointments Secretary to set this for you.

Who needs References and who can be a referee?

- Not needed for OHs, exec roles or their team, SAS members or Network roles
- Needed for new people to scouting or anyone transferring from outside the district

Please add details of two people to act as referees who are known to you and who can be contacted by email. The referees should preferably have knowledge of your work or contact with young people, and should be able to comment on your character and relationships with others. At least one referee should have known you for at least five years and one of the referees must not be from Scouting. Referees must not be relatives. Examples of referees include your employer, college tutor, etc. The referees' personal data will only be used for the purposes of providing a reference.

Support Resources

Discussions

Dorset's [Comparison](#) of Adult volunteer roles

Role [descriptions](#)

POR [table 2](#) which explains each role and its approval and training in detail

[Induction resources](#)

[Welcome managers](#) in Scouting

Application and Compass

"Appointing" [page](#), includes the Adult Information Form and ID checking form

Compass support site - [Adding Adults and Roles](#)

DBS resources

Which [documents](#) can be used for an Id Check

Compass support site - [Processing Disclosures](#)

For the volunteer

[Scout shop](#) for ordering free cards

Appointments introduction for the volunteer on Dorset's [Manager Hub](#)

Getting Started introduction for the volunteer on Dorset's [Manager Hub](#)

Reference

POR [Appointments Chapter](#)

Finding, Appointing and Welcoming volunteers [e-learning](#)

Not a PC user

With your executive's consent, appoint an Administrator to do the Compass and Atlantic steps or

Contact your local Appointments Secretary who may be able to do the Compass and Atlantic steps