

## 4.2 – Family Groups

Family Group Creation allows for the following tasks to be performed in in the Members Area:

1. Promote a family group member to primary member to manage the group
2. Renew the membership all members of the group
3. Edit personal details for an individual in the group or in bulk
4. Transfer family group to another organisation

### Answers to Commonly Asked Family Group Questions

- 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 legal standing to manage the Family Group.
- Family Groups consists of Primary member(s) who can manage the group and standard members who can be managed in the group.
- A Family Group can only exist where there is at least one Primary and one Standard member.
- A Primary member must be over 18 years old.
- Family Groups can only be created by members 18 years and over
- Email notifications will be sent when a person is demoted or removed from a group.
- Clubs must approve all requests initiated from the Family Groups area via Pending Requests in Surfguard
- Club Officers can manage the groups and perform all other family group functions from within Surfguard.
- You can be a member of more than one family group in one club
- Any disputes or issues around the creation, data management or dissolution of a group should be raised with your Club in the first instance.
- All users of the Members Area automatically agree to abide by all SLSA and State / Branch and Club Terms of Use, Privacy and other Policies, Regulations and guidelines.
- The use of family groups in the Member Area is not compulsory.

### Creating a Family Group

1. Click **Create Family Group** and type in a Family Group name eg: Smith Family

**NOTE:** You (the primary member) are automatically placed in the family group so you only need to add your other family members.

2. Type in the First Name, Last Name & DOB of a family member that you wish to add to our Family Group, tick the box Include Archived Members and click Search.

**NOTE:** For privacy reasons, you will need to match exactly each person searched to be able to add them to your Family group. If you are having difficulty finding your family members, contact your club who can assist.

3. If the system locates your family member they will be displayed in the **Available Members** on left-hand side. Highlight the name and using the > arrow key move them over to the **Selected Members** on the right-hand side. Repeat as necessary for additional family members.

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

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

### Renew Family Membership

1. Under Actions, click 'Renew Memberships'

Hi, Lola Cox

Home Memberships Patrols eLearning News and Events Document Library History Forms

## My Family

### FAMILY GROUP DETAILS

Create Family Group

Family Group Name	Number of Members	Organisation	Primary Contact	Status	Action
Cox	3	Test NSW Club	Lola Cox	Pending for Approval	<a href="#">View/Edit</a> <a href="#">Renew Memberships</a> <a href="#">Make Payment</a>

2. Tick the checkbox located to the Left of each members name

**NOTE:** Check box will not appear against members who are already registered for the selected season or have already submitted an online renewal form.

3. Tick the box to agree to the SLSA Membership Declaration

4. Click 'Submit'

5. Upon submitting your Family Groups membership renewals the system will give the Primary Family Group user the option to update\share data with the family groups. If you need to update a family group members address, phone, email and/or emergency details click on the corresponding checkbox.

6. Click Yes or No

7. Once submitted you will be given the option to make an Online Payment

**NOTE:** you can pay for the whole family in one payment. The payment will be recorded against the primary member who was logged into the Members Area.

### Add Another Existing Member to a Family Group

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

2. Click **Add New Member**

3. Repeat steps 2 -5 in Creating A Family Group details listed above

### Add Another Existing Member to a Family Group as a Primary Contact

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

2. Click **Add New Primary Contact**

3. Repeat steps 2 -5 in Creating A Family Group details listed above

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

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

2. Click **Join New Person & Add**

3. A pop up message will display advising **You will be directed to Join Surf Life Saving. Are you sure?** Click OK

4. You will then fill in the fields (first name, DOB etc) of the new member of the family that you wish to join up to your club and add to your family group.

5. Complete the pre-filled membership form (if need be), tick the declaration boxes at the bottom of the form and click the 'submit'.

6. A pending request for 'new club membership' and 'join member to a family group' will be sent to the club for approval.

### **Join/Transfer a Family Group to a new Organisation**

1. Under Actions, click **View/Edit**
2. Click **Join/Transfer to a New Club**
3. The system will ask you to 'select your situation'. In most cases you would tick the checkbox 'I want to join a surf club, or transfer to a different surf club'.
4. Select the State, Branch and Club/Organisation (from the available drop down boxes) name of the club that you wish to transfer to.
5. Tick the checkbox for the members of the family that you wish to transfer.
6. To finalise the process, tick the declaration boxes at the bottom of the screen and click the 'submit' button.

### **Dissolve a Family Group**

1. Under Actions, click **View/Edit**
2. Click **Dissolve Family Group** – The system will send a request to your club and will display in the Family Group as 'Pending Request-Dissolve Family Group' Note: The group will not be dissolved until endorsed by your club.
3. Once approved the Primary member of the dissolved group will receive an email advising of the action taken.

*Revision: 25 — Last modified: 2019/05/29*