



Scouts
SA

Operoo User Manual

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Introduction

Operoo is an innovative parent/adult member controlled electronic medical form for Scout Groups, clubs, schools and other groups with a duty of care. It's an electronic version of the paper based forms sent out for members to fill in for registration, Group camps, group events, etc.

It provides parents/adult members with the opportunity to update medical information promptly and accurately while providing the group with instant access to the emergency information for members. Groups will be using the Operoo app in the best interest of the members whilst also ensuring they are proactively fulfilling risk management and duty of care responsibilities.

Parents/Adult members can use a PC, laptop, tablet or smart-phone to enter the details including:

- Emergency contacts
- Medical contacts
- Medical checklist including asthma, allergies, seizures, diabetes
- Health and ambulance insurance details
- and more...

Purpose of Operoo

Operoo allows Groups to create eForms as electronic permission forms and is a communication tool for events and activities. The eForms removes the need to complete a paper Y4 form.

Initial setup

The process we utilise to bring Groups on to Operoo is:

- Information sent to Group (GL)
- Information distributed by GL to members of the group
- GL confirms MyScout records up to date
- MyScout and Operoo synced to ensure membership details are current
- Invites sent from Operoo for member profiles

Each Section Leader will get an invite to create a profile, once this has been done we then send invites from Operoo to Youth members.

Privacy obligations

It is imperative that all Operoo users understand that Operoo records are private and confidential. Administrator access is only granted to registered Group Leaders and Membership Officers of Scouts and only where there is a legitimate need to do so. Group Leaders have administrator access to manage their Group account within Operoo. Scouts SA recommends no more than 2 Group Administrators (a GL and Membership Officer perhaps) which mirror permissions to member data within MyScout.

It is important for the safety and security of member data that logins are not shared and all users have appropriate passwords and safeguards in place which are not shared with others. The Operoo website and 'app' provide this level of functional security to the system.

Operoo has an audit feature which tracks and records the details every time a profile is accessed.

Group Leader

A Group Leader is provided with a personal account under their name to create a profile and record medical details. A second account is created as the Group Leader that allows full administration access. No personal details are recorded on this profile to allow it to be passed on to any new Group Leaders with a simple password change.

Audit trail

Operoo records all communication sent by email or SMS's to a member and can be viewed by the Administrator.

Viewing profiles

In addition to viewing profiles online on a computer, Administrators can also view profiles online or offline by downloading and using the mobile app on a phone or tablet. When signing in via the mobile app with network or internet coverage all current profiles will be automatically downloaded. The downloaded profiles will then be available next time the mobile app is accessed, whether network and internet coverage is available or not. Members can also print a hardcopy of their Operoo record if attending an event where the Leader will not have electronic access to their profile. Hardcopy printouts should be securely destroyed following the event.

Roll call

The Roll Call report is used to record attendance for any excursion or camp to mark those who are present or absent.

Category for high priority members

Members can indicate the risk level of their child's medical condition. Depending on the risk, Administrators and Staff Carers can easily identify if it's High, Moderate or Low.

Profile sharing

At all times an Operoo profile remains the property of the member. The profile owner may specifically elect to share that profile with organisations such as Scouts or a school. When a profile is shared with Scouts we are only granted access to view it and are unable to change any aspect of the profile. A profile owner only completes one profile per member but can share this single profile with as many organisations as they wish. A profile will only be shared if the profile owner clicks the "Share" button that is specifically linked to a share request from the relevant Scouting formation.

Operoo records are maintained and updated by the profile owners, so profiles should contain up to date health records and contact details. Profile owners are periodically reminded by Operoo to update their profiles.

Profile completion requests

After a new member is added in Operoo a profile request will be generated for them and will be emailed to the profile owner asking them to complete the member's profile and share it with Scouts. If this is not done within 5 days then Operoo will send periodic email reminders to the profile owner until the profile is completed and shared.

A Medical eForm is automatically attached to each formation. This eForm will automatically contact all selected profile owners on a periodic basis and request them to review and update their medical details. The default frequency of these periodic reminders is every 12 months.

Cost of Operoo

The cost for Operoo is covered by Scouts Australia (SA Branch). If you want to use it for other family members it is free. Families can also download the free app for Operoo for iPhone, iPad, Android phones and Android tablets. These mobile versions store a secure encrypted copy of the care profiles on the device. This means the information can be accessed by you even without internet access.

Levels of users

The Administrator for each Group

- This is the Group Leader, Leader in Charge or Membership Officer for the Group and this role has the ability to create sub-groups and enable (approve) eForms.

A Group Carer

- This level is able to view the profiles of all members within a section or eForm for which they have been given Carer access and can create but not enable an eForm. For instance, an Administrator could add a Cub Leader as a Carer for the Group's Cub Pack thus allowing the Cub Leader to view the care profiles of all Cubs in that Pack.

A profile owner






- This is the person who creates and owns a Operoo profile. In the case of a youth member the profile owner would normally be their parent or guardian. In the case of an adult member the profile owner would be that adult member.

Instructions

Symbols/ Meaning

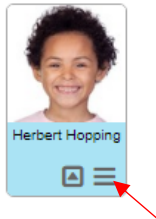
Students = Youth Members

Staff = Adult Members

	Youth Member
	Adult Members
	Form Library
	Reports/ Archives
	Settings

Viewing profiles

1. Select the menu button on the profile you wish to view.



2. Select view member profile.

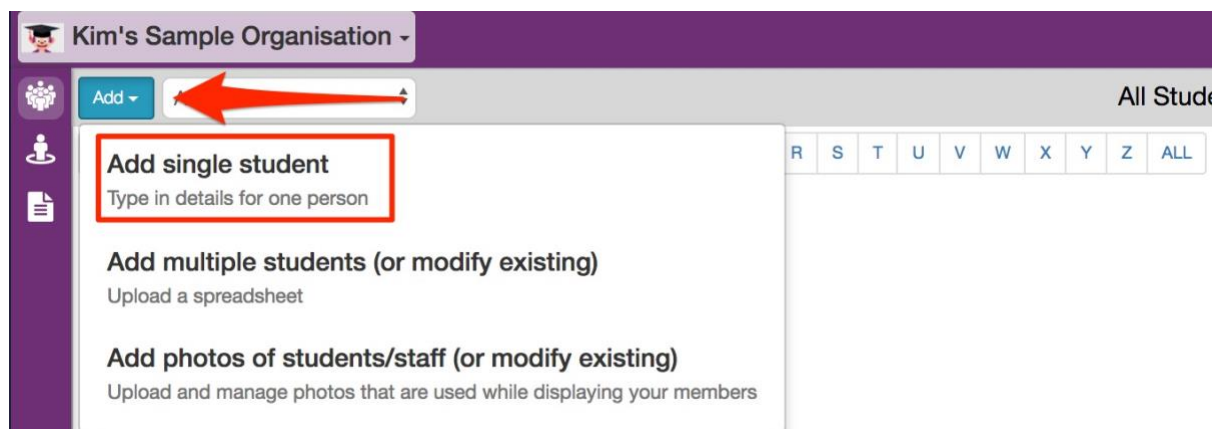
Adding members

Requesting a profile share will only appear in a members profile if the profile has been fully completed and the name and email address in the member profile exactly match the name and email address in the Scout Group Operoo.

Adding single member

Click on the **Add** button at the upper left of the home screen.

1. Select **Add single Youth member** or **Add single student**.



2. Fill in the information for the Member with his or her guardians contact details. Boxes highlighted in red are the required fields. Adding a profile to a group or an eForm may be done on this page, or after the profile request was sent. Once done, click **Save and Send Request**.

New

Name* Email address to request from*

Secondary email address for notification only Mobile Phone Number

Profile ID

☐ Manage this profile locally (use only if CareMonkey will not be used for this profile)

Add this member to the following student groups

☐ Check all

☐ Green Team

☐ Yellow Team

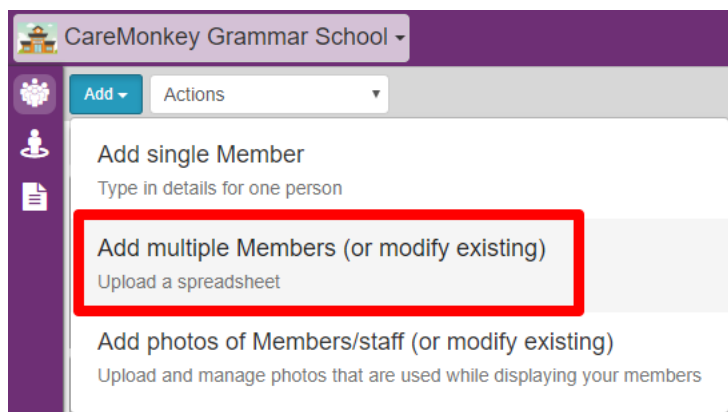
Send Reminder Emails

Use default group setting (currently 2 days) ▼

3. Drag and drop the new member to the medical form in eForms. This will send the member the request to complete the medical form.

Adding multiple members

1. Select **"Add"** on the home screen that can be found at the upper left side of the page below the organisation's logo. Then, select **Add multiple members (or modify existing)**.



2. Select **'Choose File'** to search for the spreadsheet you have created and select it to upload.

CareMonkey Grammar School - My Account - Help - Sign Out

Import Profile Requests

You can upload your profile requests using a spreadsheet

Step 1 - Create or use a spreadsheet with columns for the following

- Full name (or first name and last name)
- Email address of requestee (eg. the parent or adult member)
- Mobile phone number of requestee (eg. the parent or adult member)
- Secondary email (eg. spouse email address)
- Profile ID (eg. Education (non-tertiary) ID)
- Groups (eg. class, year level or team name)

Step 2 - Save the spreadsheet as an Excel (.xls or .xlsx) file or an OpenOffice file (.ods) or a CSV file (.csv) (for Excel/OpenOffice Spreadsheets, the first sheet will be used)

Step 3 - Use the link below to locate your file

Step 4 - Press 'Select Columns' button

Choose File No file chosen

Cancel

Select Columns

3. Look for the spreadsheet from your computer and then click on **Open**.

4. Now that your spreadsheet is uploaded, click the **Select Columns** button.

CareMonkey Grammar School - My Account - Help - Sign Out

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Step 2 - Save the spreadsheet as an Excel (.xls or .xlsx) file or an OpenOffice file (.ods) or a CSV file (.csv) (for Excel/OpenOffice Spreadsheets, the first sheet will be used)

Step 3 - Use the link below to locate your file

Step 4 - Press 'Select Columns' button

Choose File International School.xlsx

Cancel

Select Columns

5. Make sure your titles' match with what's in the boxes above them. To edit, click the box and a drop down bar will appear like shown below. Deselect the first row with your column names, if you made one. Then, the **Preview Changes** button to see the changes that will be made.

Check all	Profile ID	Full name	Email	Group Name 1
<input type="checkbox"/>	Profile ID	Person Name	Email	Group
<input checked="" type="checkbox"/>	2018-0001	Pleur Delacour	test@email.com	Year 1
<input checked="" type="checkbox"/>	2018-0002	George Weasley	test@email.com	Year 1
<input checked="" type="checkbox"/>	2018-0003	Fred Weasley	test@email.com	Year 1
<input checked="" type="checkbox"/>	2018-0004	Anna Smith	test@email.com	Year 1
<input checked="" type="checkbox"/>	2018-0005	Percy Weasley	test@email.com	Year 1
<input checked="" type="checkbox"/>	2018-0006	Ronald Weasley	test@email.com	Year 2
<input checked="" type="checkbox"/>	2018-0007	Bill Weasley	test@email.com	Year 2
<input checked="" type="checkbox"/>	2018-0008	Hermione Granger	test@email.com	Year 2
<input checked="" type="checkbox"/>	2018-0009	Harry James Potter	test@email.com	Year 2
<input checked="" type="checkbox"/>	2018-0010	Luna Lovegood	test@email.com	Year 2
<input checked="" type="checkbox"/>	2018-0011	Neville Longbottom	test@email.com	Year 3
<input checked="" type="checkbox"/>	2018-0012	Draco Malfoy	test@email.com	Year 3
<input checked="" type="checkbox"/>	2018-0013	John Smith	test@email.com	Year 3
<input checked="" type="checkbox"/>	2018-0014	John Doe	test@email.com	Year 3
<input checked="" type="checkbox"/>	2018-0015	Jane Doe	test@email.com	Year 3

Back

Preview Changes

6. The information you are importing will be displayed on the next page, with any changes to be made shown in **red**. Any **Groups** that are to be created will also be shown at the bottom left of the page.

Import Profile Requests

Changes that will be made are highlighted in **red**

Name: Fleur Delacour Profile ID: 2018-0001 Groups: Year 1 Master Group: 338792	Importing as a new profile request
Name: George Weasley Profile ID: 2018-0002 Groups: Year 2 Master Group: 338792	Importing as a new profile request
Name: Fred Weasley Profile ID: 2018-0003 Groups: Year 3 Master Group: 338792	Importing as a new profile request
Name: Anna Smith Profile ID: 2018-0004 Groups: Year 4 Master Group: 338792	Importing as a new profile request
Name: Percy Weasley Profile ID: 2018-0005 Groups: Year 5 Master Group: 338792	Importing as a new profile request

The following groups will be created:

Year 1
Year 2
Year 3
Year 4
Year 5

7. Any text in **blue** indicates that the data for a selected profile is not in the correct format (eg. letters in the "mobile number" field). Please make note of these profiles, as they will have to be imported again once the data has been fixed.

8. Select **Confirm** to continue, then click the **Done** button on the next page.

9. Drag and drop all new member to the medical form in eForms.

Archiving Members



















When a member leaves the group, the profile will be archived and not available on mobile devices anymore. Furthermore, any new changes made to the profile will not be shared with the group. This does not delete the care profile from the members account.

1. Select the profiles you want to archive. Notice that the profiles will change colour to green when selected.

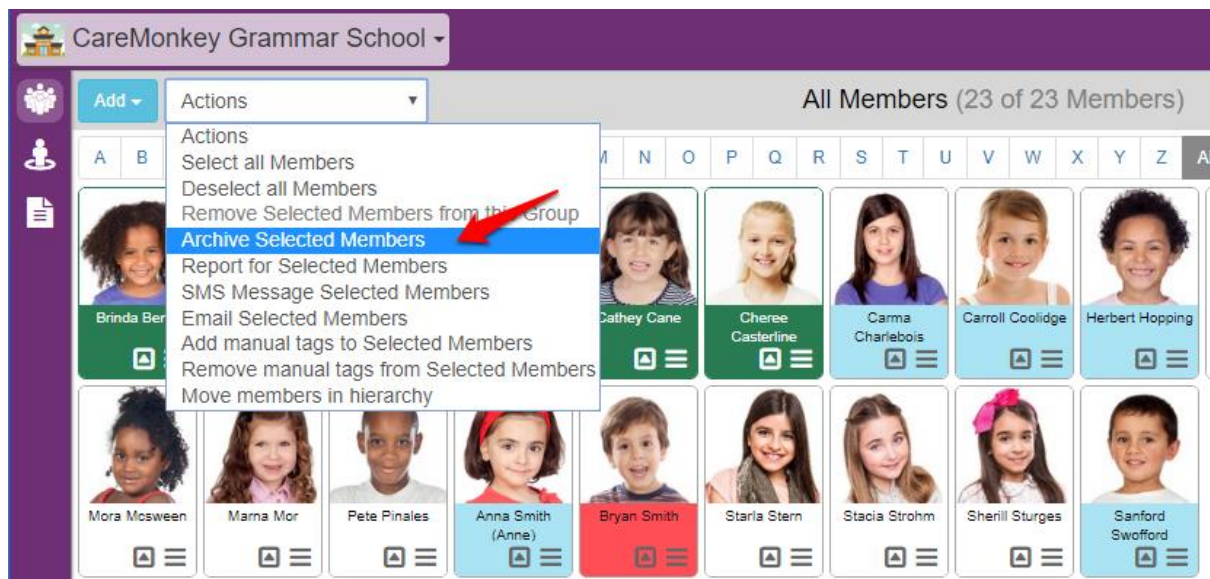
CareMonkey Grammar School

Add Actions

All Members (23 of 23 Members)

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	A
 Brinda Bentz	 Bertha Bowler	 Beatriz Buss	 Casandra Cabrales	 Cathey Cane	 Cheree Casterline	 Carma Charlebois	 Carroll Coolidge	 Herbert Hopping																		
 Mora Mcsween	 Marna Mor	 Pete Pinales	 Anna Smith (Anna)	 Bryan Smith	 Starla Stern	 Stacia Strohm	 Sherill Sturges	 Sanford Swofford																		

2. Click the **Actions** drop-down menu and click **Archive Selected Members** to archive the selected profiles.



3. There will be a pop-up window similar to below that will appear. Tick the box for ***"I am sure I would like to archive these members."*** and hit the **Archive** button to proceed.

The screenshot shows a pop-up window titled 'Archiving Members'. It contains the following text:

Are you sure you want to archive 6 members?

By archiving a Member you remove them from appearing as a Member, or in any Groups or eForms.

You can find any Archived Members in Reports/Archives.

You are about to Archive the following Members:

- Cathey Cane
- Carroll Coolidge
- Carma Charlebois
- Brinda Bentz
- Bertha Bowler
- Casandra Cabrales

Below the list, there is a checkbox labeled 'I am sure I would like to archive these members.' which is checked. A red arrow points to this checkbox. At the bottom, there are two buttons: 'Archive' (highlighted with a red box) and 'Cancel'.

Moving a Member Profile between Units

When a Youth Member starts linking and moving between Units, you will need to move them on Operoo.

To do this:

1. Browse and find the member in Operoo.
2. Click on the member profile by clicking on the 3 horizontal lines.
3. Click edit Groups and E-Forms.
4. Select the Unit that the Youth Member should be in and untick if they have left the other section then click Save.
5. When e-forms are activated you can also do likewise with selecting and unselecting e-forms

Meaning of profile colours

When an Administrator views the profiles in their formation they will see them as either blue, red, green or yellow. These colours have the following meanings:

Blue means the profile has been successfully completed and shared with Scouts.

Red means the profile has not been completed and shared with Scouts. By clicking on the menu symbol (the three little horizontal lines) of a profile an Administrator will be taken to the Profile Request screen where they can see the current completion status of a profile in the bottom left corner of the screen.

Green means the profile request has an invalid email address. In this case the Administrator needs to correct the email address for the profile.

Yellow means the profile is being managed locally because the member refuses to use Operoo. No emails will be sent and no health information collected. This can be set or unset by clicking "Edit profile request" for the profile then ticking or unticking the "Manage this profile locally" box.

Invalid email

Check for any green profiles in Operoo. This means their recorded email address is invalid and the member's family are not receiving emails from Operoo. Update the email address on the Operoo profile request via the Override email box. Click on the menu symbol for the profile, then click on "Edit profile request" and enter the correct email address into the "Override email" field then click "Save".

Changes to a profile request

Prior to the completion of a profile by the profile owner, an Administrator may change the email address to which the profile request is being sent (through the Override email field as outlined above) or may archive/delete the profile request.

Changes to a completed profile

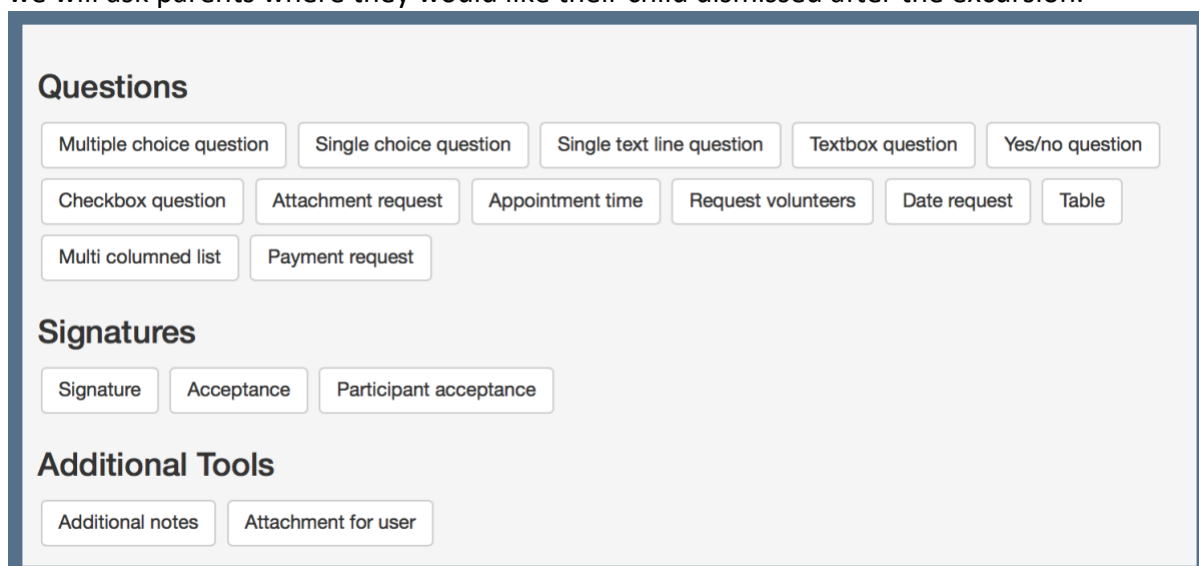
Once a profile has been completed then only the profile owner can change the details within that profile.

eForms

Creating eForms for Administrator

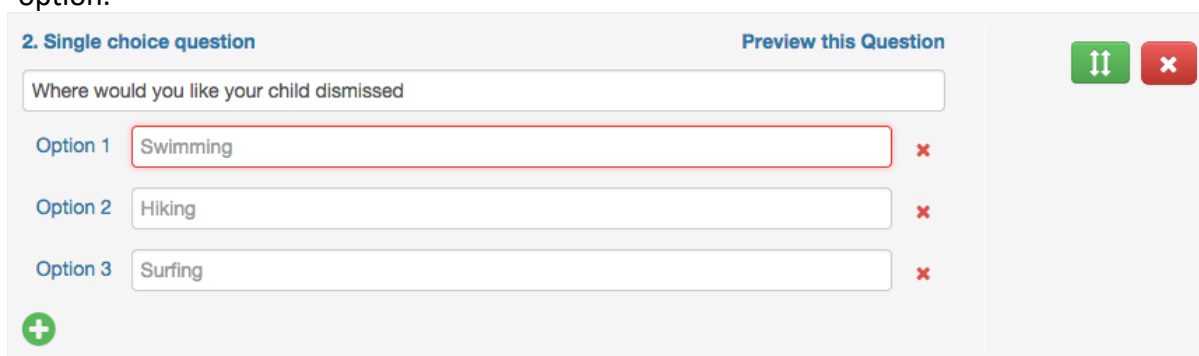
1. From your Operoo view, select Add eForm, Add Parent Form, Use one of your eForm templates, then select Y4 Parent Advice Form.
2. Use "Event" as the eForm type. Choose this type to require a response and a signature acceptance for a member.
3. Complete the event details.
4. Requires up to date Care Profile?
Yes: Profile owners will be asked to confirm that the profile is up to date before replying to the form. This will automatically add the member or participant to the Medical eForm.
No: Profile owners can respond to the form without creating the profile.
5. Adding Form Elements (Optional)

a. There's a variety of form elements available for customisation. For this example, we will ask parents where they would like their child dismissed after the excursion.



The screenshot shows a panel titled 'Questions' with a grid of buttons for different form elements. The buttons are arranged in three rows: Row 1: Multiple choice question, Single choice question, Single text line question, Textbox question, Yes/no question; Row 2: Checkbox question, Attachment request, Appointment time, Request volunteers, Date request, Table; Row 3: Multi columned list, Payment request. Below the 'Questions' section is a 'Signatures' section with buttons for Signature, Acceptance, and Participant acceptance. At the bottom is an 'Additional Tools' section with buttons for Additional notes and Attachment for user.

b. Type in the "Question" and the relevant answer options. If more options are required, simply press the + icon or the x icon to remove unnecessary answer option.



The screenshot shows the '2. Single choice question' editor. It has a title bar with '2. Single choice question' and a 'Preview this Question' link. Below the title is a text input field containing 'Where would you like your child dismissed'. To the right of the input field are two icons: a green double arrow (swap) and a red 'x' (delete). Below the input field are three 'Option' rows. Each row has a label (Option 1, Option 2, Option 3) and a text input field. Option 1 contains 'Swimming', Option 2 contains 'Hiking', and Option 3 contains 'Surfing'. To the right of each input field is a red 'x' icon. At the bottom left of the options section is a green '+' icon.

c. Clicking on the **Preview this Question** will bring up a pop-up window displaying how the question will look. This is very useful when it is unclear what type of form element will be created.

d. Once the questions and answers have been created, it is possible to re-order them by clicking and dragging.

6. Member selection - suggested to use Link to Group. If using drag and drop ensure you haven't missed any members.
7. Save.

Managing and Maintaining Carers (Leaders)

Carers (the Operoo definition of a Leader) are maintained in a separate section to Youth Members in Operoo.

In the purple bar on the side, click the second icon to view your "Staff". Staff can be added and removed in the same way as a Youth Member.

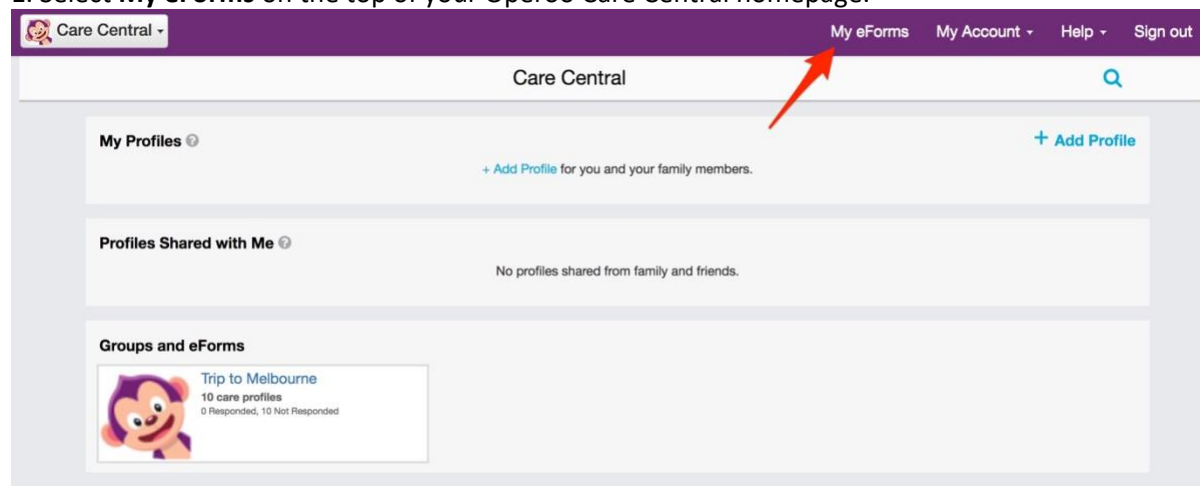


Once a profile is setup, you can then provide access to the relevant Unit by following the same steps as Moving a Member Profile between Units.

Creating eForms for Leader

Creating an eForm as a Leader (Carer) is slightly different to an Administrator view.

1. Select **My eForms** on the top of your Operoo Care Central homepage.



2. Select start from an existing template Y4 form.
3. Follow steps 2 to 7 from Creating eForms for Administrator.
4. Communicate to Administrator to confirm and enable the **eForm**.

Viewing participant responses

By clicking anywhere on an eForm (other than the menu symbol) the profiles for the participants and their response status will be displayed. A green circle with a tick means they have accepted, a yellow circle with a question mark indicates no response as yet and a red circle with a cross indicates they have declined the invitation to attend. By clicking on the menu symbol of a participant's profile you can view their individual response to the eForm.

eForm status

If an eForm has a box with a tick displayed in its icon then it is active and enabled, if it has a box with a cross displayed then it is either expired or not enabled. An eForm that is no longer required can be archived by clicking on the menu symbol for the eForm and then "Archive this eForm" in the menu on the left of the screen. An archived eForm cannot be re-used.

Audit trail

An Administrator can view the contents of all emails and SMS's sent to a member by clicking on the menu symbol in the member's profile then selecting "View audit trail".

eForm reports

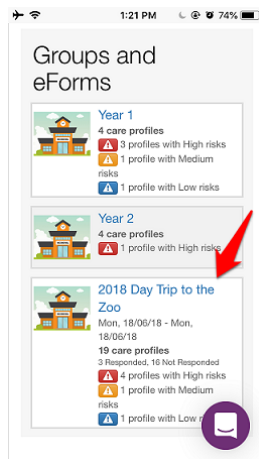
For reports and other useful information about an eForm click on the menu symbol for the eForm and the menu on the left of the screen will provide a variety of options, including timelines (a history of when each participant received the emails and responded), a summary of responses and any completed roll-call reports. Carers can also access reports and information on the eForm through

the “My eForms” menu when they log in. This includes access to a roll-call report which can be used to electronically record the presence of participants at any given times during the event.

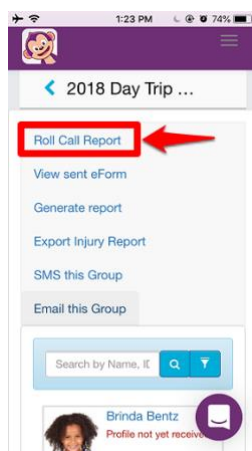
Roll Call

1. Sign-in to Operoo on a mobile device or a browser.
2. Go to the **Groups and eForms** section and click on the **Group** name or **eForm** name in question.

Roll Call report below is using a mobile phone.



3. Click on **Roll Call Report** to submit a roll call report.



4. Type in the details for the first roll call report, tick the members who are present, and click on the **Save** button.
5. If there's a need to edit the report, click on the **Edit** icon, make the necessary changes, and click on **Save**.
6. If there's a need to enter another roll call report, please click on **New Roll Call Report**. Subsequent roll calls will show you who was present for the previous roll call so that you can better keep track all the activities.
8. The reports will now be shown under the Roll Call Report of the eForm. It will be sorted based on when it was created, with the latest roll call report on top.

Emailing eForm members

Administrators and Carers can send emails to all eForm participants by clicking on the menu symbol for the eForm and then selecting from the options in the “Message eForm Members” section of the menu on the left of the screen.

Reports

An Administrator can view a variety of reports for their formation by clicking on the reports/Archives menu in the bottom left corner of the screen

Additional Functions

Operoo as a communication tool

Some Groups are increasingly using Operoo as a communication tool for emailing or SMS-ing members with updates to events or activities. Each active Group received an initial SMS credit in Operoo with the option to purchase, at the Group’s expense, further credits directly from Operoo by clicking on the Settings menu in the bottom left corner of the screen then selecting the “Manage SMS” option.

Manual tags

An Administrator can manually add a tag to profiles to allow the creation of sub-groups (Smart Groups) or eForms based on specific criteria. For instance, all members of a group with a first aid qualification could be tagged or all Patrol Leaders could be tagged. Multiple tags can be added to any individual profile and tags can be added to describe any useful criteria. To add a manual tag to one or more profiles, click on the profiles that are to be given the tag (they will be highlighted to indicate that they have been selected) then in the top left corner of the screen, in the “Actions” drop-down menu, select “Add manual tags to Selected Profiles”. Enter the text that briefly describes the criteria that is being tagged (eg. “patrol-leader”) then click the “Add” button. These tags can then be used to create Smart Groups and eForms which will only include those members with the specified tag. Any members who are subsequently given the same tag will automatically be added to any Smart Group or eForm that uses that tag as a filtering criteria.

Further information or assistance

Click on “Help” then “FAQ’s” when logged in to Operoo

Visit the Operoo website www.operoo.com and view their demonstration videos by clicking on the “Learn” menu then “Demonstrations”.

For technical problems, call the Operoo helpline on 8658 1424, email Operoo via support@operoo.com or use Live Chat when logged into Operoo.

Join the Scouts SA Operoo Forum <https://www.facebook.com/groups/operoosa>

For Scouts specific Operoo issues, email Scout HQ on operooadmin@sa.scouts.com.au