



COMPASS
Helping you keep track of Scouting

User guide: ending a full role satisfactorily or unsatisfactorily

Roles: Appointment Secretaries and Commissioners, HQ Administrators.

Process overview: This process will allow users with the correct access rights to close a single role or multiple roles for a single member satisfactorily or unsatisfactorily.

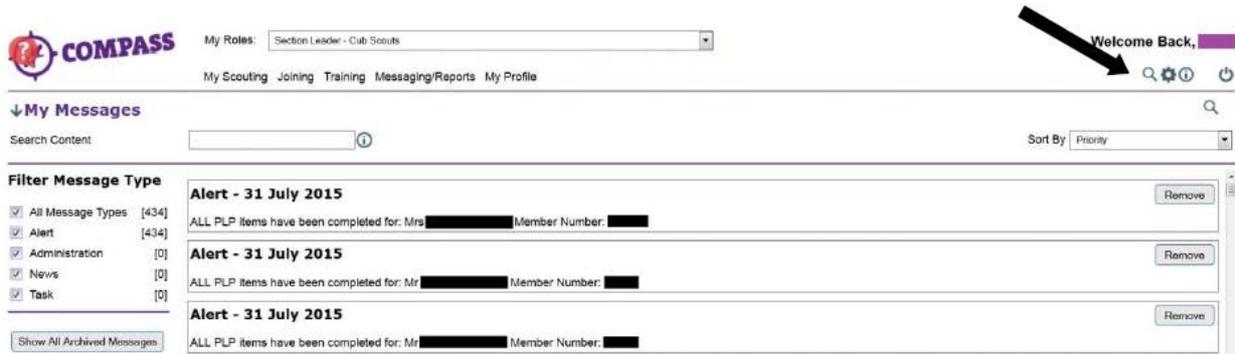
If a role is closed for satisfactorily reasons, the outcome of this process is that the role selected will be closed and the member's service for that role recorded as 'Satisfactory'. You will need the member's membership number to be able to search for their record

If a role is closed for unsatisfactorily reasons, the outcome of this process is that the role selected will be closed and the member's service for that role recorded as 'Unsatisfactory'. You will need the member's membership number to be able to search for their record.

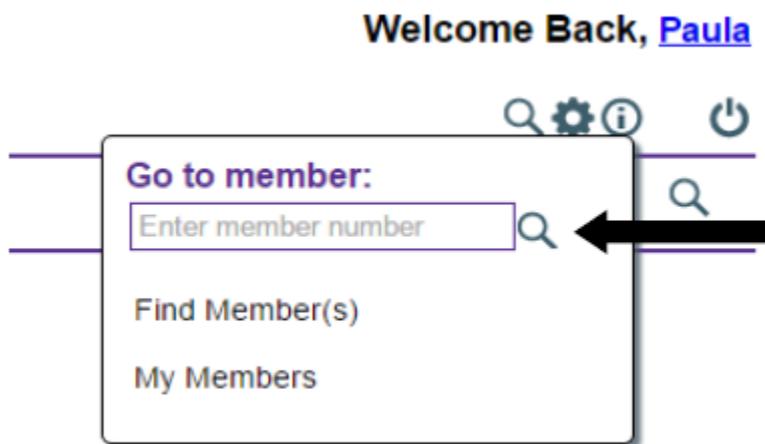
DO NOT use this method if ending a role for someone who has died as this will send an email that may be upsetting to the family. Instead, please refer to the user guide '[Ending a full role satisfactorily or unsatisfactorily](#)'.

Process: ending a full role satisfactorily

- 1 Hover over the magnifying glass symbol located at the top right of the homepage



- 2 Type the membership number of the member you want to find into the 'Go to member' box then click the magnifying glass.



If you do not know the membership number, click on 'Find member(s)'.

- On the member's profile page there will be a row of headings underneath the Member's name and membership number. Click the 'Roles' heading.

The screenshot shows the COMPASS member profile page. At the top, there is a navigation bar with 'My Roles' and 'Welcome Back'. Below this is a row of tabs: 'Personal Details', 'Roles', 'Permits', 'Training', 'Emergency Details', 'Communications', 'Visibility', and 'Disclosures'. The 'Roles' tab is highlighted with a black arrow. Below the tabs, the 'Personal Details' section is visible, showing fields for Name, Known As, Member No., Date of Joining, Date of Birth, Gender, Nationality, Ethnicity, Religion/Faith, and Occupation. Below this is the 'Contact Details' section with fields for Address and Phone.

- The roles page will display all of the member's active roles. These will be displayed as a list going down the page.

The screenshot shows the COMPASS member profile page with the 'Roles' tab selected. The 'Roles (2 Active)' section displays a table of active roles. The table has columns for Role, Class, Location, Start Date, End Date, Status, and Options. The roles listed are Assistant Section Leader - Cub Scouts [Primary], Group Executive Committee Member, and Section Assistant - Cub Scouts.

Role	Class	Location	Start Date	End Date	Status	Options
Assistant Section Leader - Cub Scouts [Primary]	Leader	Cub Pack @ 1st	11 May 2011		Full (Review Due: 27 Sep 2019)	Edit End
Group Executive Committee Member	Committee	1st	01 July 2013		Full	Edit End
Section Assistant - Cub Scouts	Leader	Cub Pack @ 1st	02 March 2011	11 May 2011	Closed	View

- All Active roles will have an 'End' button at the right hand side of the page under the 'Options' heading. Click on the 'End' button by the role you want to close.

The screenshot shows the COMPASS member profile page with the 'Roles' tab selected. The 'Roles (2 Active)' section displays a table of active roles. The table has columns for Role, Class, Location, Start Date, End Date, Status, and Options. The roles listed are Assistant Section Leader - Cub Scouts [Primary], Group Executive Committee Member, and Section Assistant - Cub Scouts. An arrow points to the 'End' button in the 'Options' column for the 'Assistant Section Leader - Cub Scouts [Primary]' role.

Role	Class	Location	Start Date	End Date	Status	Options
Assistant Section Leader - Cub Scouts [Primary]	Leader	Cub Pack @ 1st	11 May 2011		Full (Review Due: 27 Sep 2019)	Edit End
Group Executive Committee Member	Committee	1st	01 July 2013		Full	Edit End
Section Assistant - Cub Scouts	Leader	Cub Pack @ 1st	02 March 2011	11 May 2011	Closed	View

- 6 To close more than one role, use the tick boxes at the left of the page to select the roles you want to close and then click the 'End roles' button at the bottom.

COMPASS My Roles: [dropdown] Welcome Back, [name]

My Scouting Joining Training Messaging/Reports My Profile System Admin

Personal Details **Roles** Emergency Details Communications Visibility Disclosures

↓ Roles (2 Active)

<input type="checkbox"/> Y Role	Y Class	Y Location	Y Start Date	Y End Date	Y Status	Options
<input type="checkbox"/> Assistant Section Leader - Cub Scouts [Primary]	Leader	[redacted] Cub Pack @ 1st: [redacted]	11 May 2011		Full (Review Due: 27 Sep 2019)	Edt End
<input type="checkbox"/> Group Executive Committee Member	Committee	1st: [redacted]	01 July 2013		Full	Edt End
<input type="checkbox"/> Union Assistant - Cub Scouts	Leader	[redacted] Cub Pack @ 1st: [redacted]	02 March 2011	11 May 2011	Closed	View

New Role Membership **End Roles** Set Order / Preference

- 7 A popup window will appear titled 'End adult role', with the member's name and membership number underneath. Click the 'End role(s) satisfactorily' button and continue.

Please Note: If you are ending a role unsatisfactorily then please click on 'End roles(s) unsatisfactorily' and proceed straight to step 13 in the guide at the end of this process.

End Adult Role [X]

[redacted] [redacted]

End Role(s) Satisfactorily ←

End Role(s) Unsatisfactorily

Close

8 A pop up window will appear.

End Adult Roles - Satisfactorily X

Enter Details * Required fields

End Date [Calendar icon]

Reason

Reason Free Text

Role(s) being ended

- Group Executive Committee Member

Previous Close Clear Next

Complete all of the boxes in the window as follows:

- Enter the role's end date into the 'End date' box by clicking the calendar symbol and selecting the date required.
- Click the arrow to the right of the 'Reason' field to show a drop down menu. Select the reason why the role is ending.
- To provide more information about the reason behind the closure of the role, type into the 'Reason free text' box.

9 The lower half of the window displays the role(s) being ended.

End Adult Roles - Satisfactorily X

Enter Details * Required fields

End Date [Date Picker]

Reason -- Select Reason --

Reason Free Text [Text Area]

Role(s) being ended

* Group Executive Committee Member

Previous Close Clear Next

10 When the information is complete click the 'Next' button at the bottom right of the page.

11 The 'Next' button will change to an 'End role' button. Click the button again to confirm ending the role.

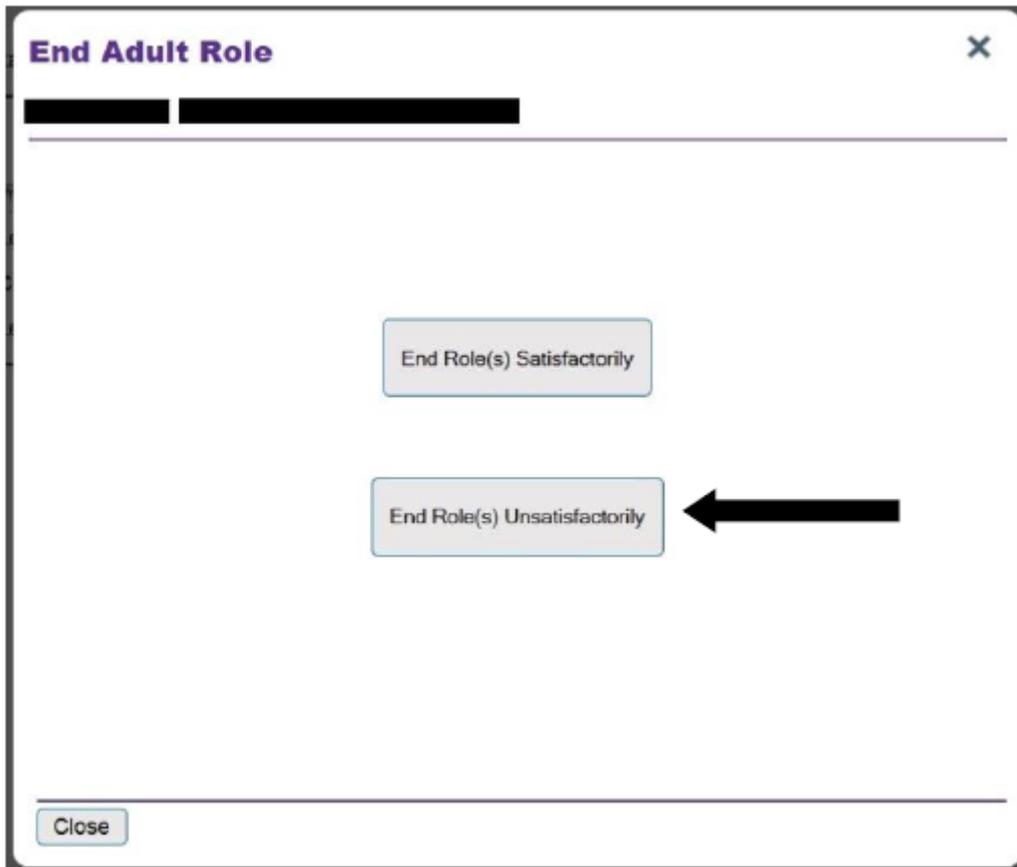
12 You will be taken back to the member's 'Role(s)' page. The role you closed will now be displayed on the list as 'Closed'.

If the member has no other active roles, you will see a pop up saying 'This role has now been closed' and you won't be able to find the member's record.

Process: ending a role unsatisfactorily

Continuing from step 7 above:

- 13 A popup window will appear titled 'End adult role', with the member's name and membership number underneath. Click the 'End role(s) unsatisfactorily' button.



14 Clicking the 'End role(s) unsatisfactorily' button will bring up the following options in the window.

The screenshot shows a window titled "End Adult Roles - Unsatisfactorily" with a close button (X) in the top right corner. Below the title bar, there are two blacked-out fields. The main content area is divided into two sections. The first section, "Enter Details", has a red dot and the text "Required fields" to its right. It contains three fields: "End Date" with a date picker showing "31", "Reason" with a dropdown menu showing "-- Select Reason --", and "Reason Free Text" with a large text area. The second section, "Role(s) being ended", contains a list item: "• Section Leader - Beaver Scouts". At the bottom, there are four buttons: "Previous", "Close", "Clear", and "Next".

- Enter the end date of the role into the 'End date' box.
- Use the drop down menu labelled 'Reason' to select the reason for ending the role.
- Further information about the reasoning for closing the role will need to be placed into the 'Reason free text' box.

15 The lower half of the window will display the role(s) being ended.

This screenshot is identical to the one above, but a large black arrow points from the left towards the "Role(s) being ended" section, highlighting the list item "• Section Leader - Beaver Scouts".

