VS 2.0 Updates for the SU Registrar

Membership Coordinators:

Troops in ==Association 10, 11, 12, 21, 22, 23:==
Shandel Johnson: sjohnson2@gscnc.org

Troops in ==Association 14, 15, 37==
Pam Allen: pallen@gscnc.org

Troops in ==Association 31, 32, 33,34==
Xeena Blackwell: xblackwell@gscnc.org

Troops in ==Association 40, 42, 50, 60:==
Annette Rollins: arollins@gscnc.org

Troops in
==Association 51, 52, 53, 54, 55, 56==
Toni Jenkins-Payne: tjenkinspayne@gscnc.org

==Troops in Association 70, 80, 90==
Linda Knapp: lknapp@gscnc.org

Agenda

- Account set up and password reset
- Household and Guardian updates
- Registration Workflow [Adult & Girl]
- Background Check
- Financial Assistance
- Troop to Troop Transfers
- Out of Council Transfers
- How to place a request to start a new troop
- New troop "registration link"
- Troop catalog edits/updates
- SU Registrar Reports will continue

Account set up and password reset
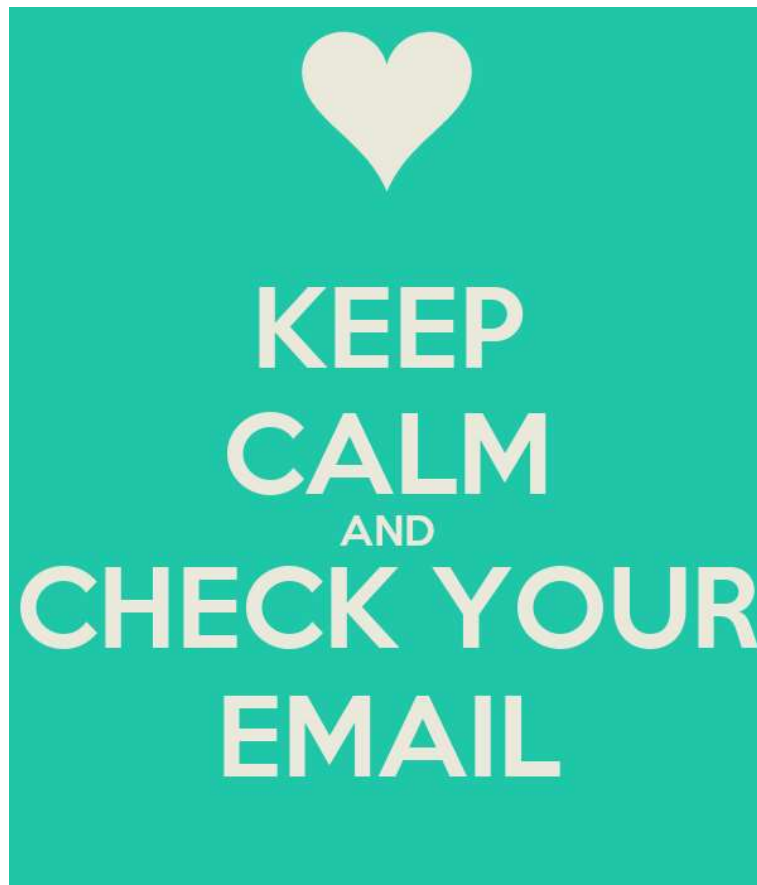
Emails going out to all members to set up MY ACCOUNT

My GS will be replaced with LOG IN on Website

Members should click on email and set up password to access My Account

4

Slide 4

girl scouts

Hey Tonia,

Get excited—we've made some updates to myGS to make it easier than ever to manage your Girl Scout membership!

To get started, you'll need to reset your account password.

RESET PASSWORD

It's easier than ever to renew, find volunteer opportunities, search upcoming events, or invite more friends to join! Check out our latest features to keep the fun and the sisterhood strong this year!

Have a question? Don't be shy!
Contact us for more information.

girl scouts

Hi **Tonia Lafond**,

You're almost done! Set a new password for your Girl Scouts account now.

Set a new password

Sincerely,
Girl Scouts of the United States of America

Note: If you need assistance or if you believe this request was made in error, please contact us immediately at gsusacustomercare@girlscouts.org

Log in to My Account
Questions? Girl Scouts of the USA is here to help
Click here to contact us!

5
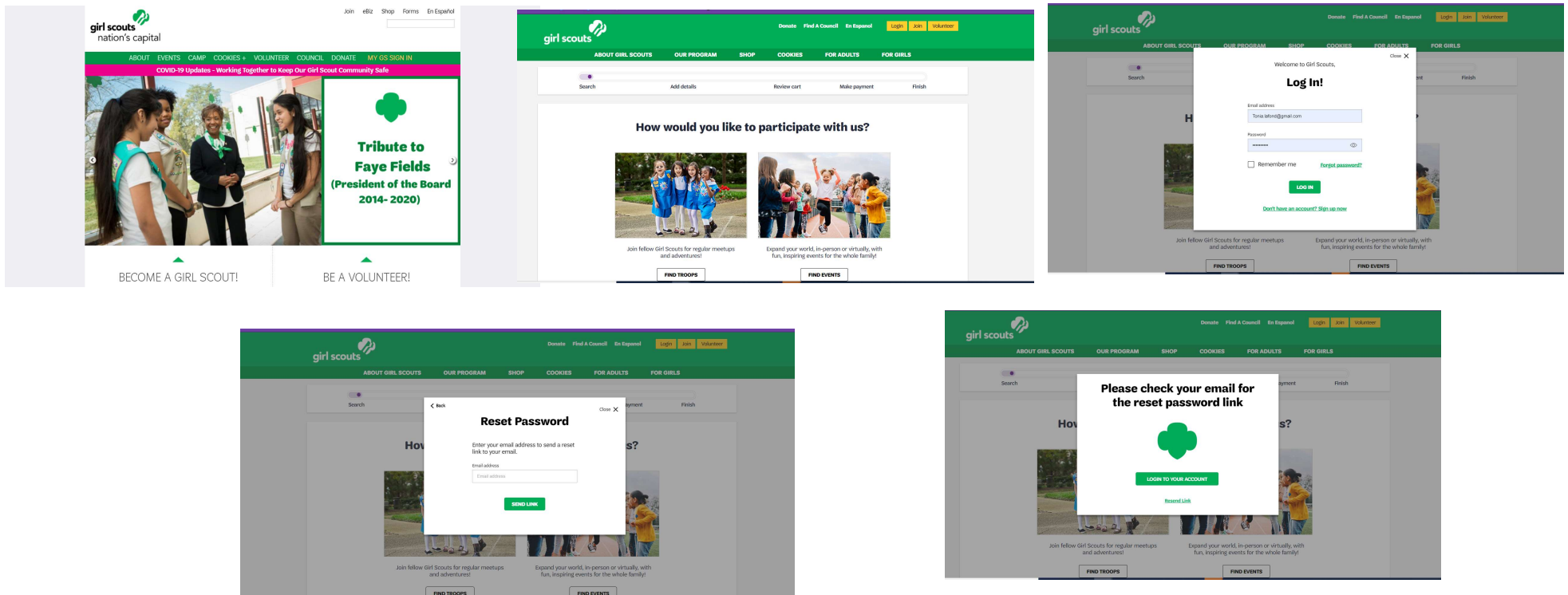
Household and Guardian updates

Guardians can edit information in their MY ACCOUNT to include:
- Address
- Add or change a troop
- Add or change a role
- Add another adult access

Changes that require staff assistance:
- Date of birth edits
- Grade edits

In VS 2.0 girls can belong to more than one Household. We have a split household option.

Remember: Girls can belong to more than one household but can ONLY belong to ONE TROOP at a time.

Adults can have multiple roles in multiple troops and/or Service Unit.

Registration steps

New Volunteer Walkthrough

Meet Genesis!

- New adult member
- Interested in signing up to volunteer with a council in her area

New Volunteer Workflow
- Searching for Volunteer Roles
- Reviewing and Filtering Volunteer Roles
- Registering for a Role

Starting the volunteer workflow
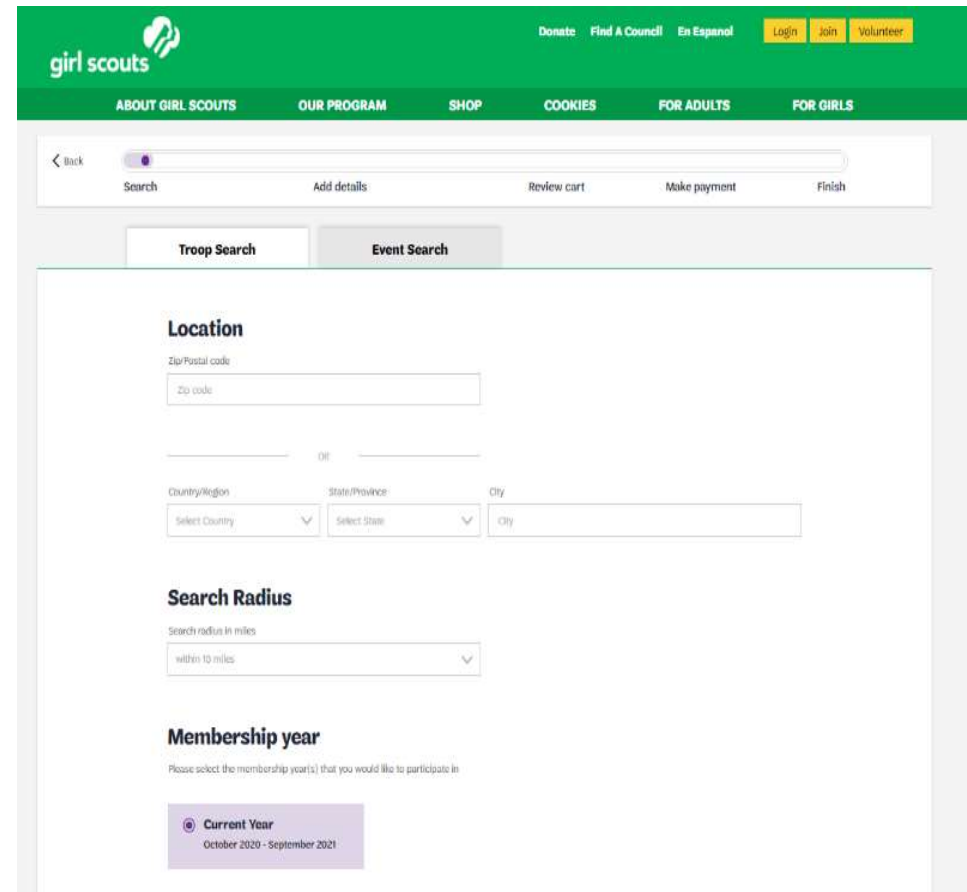
The volunteer workflow begins when a customer selects "Volunteer" from the participation page.

Genesis selects "Volunteer" and is prompted to log-in or create an account.
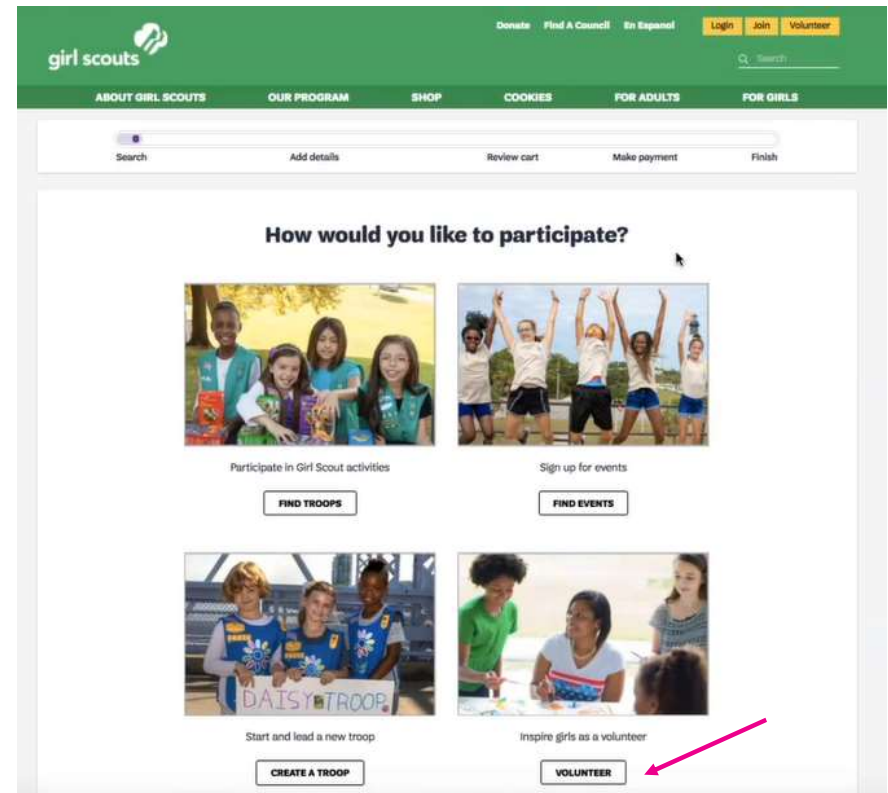
Searching for volunteer roles
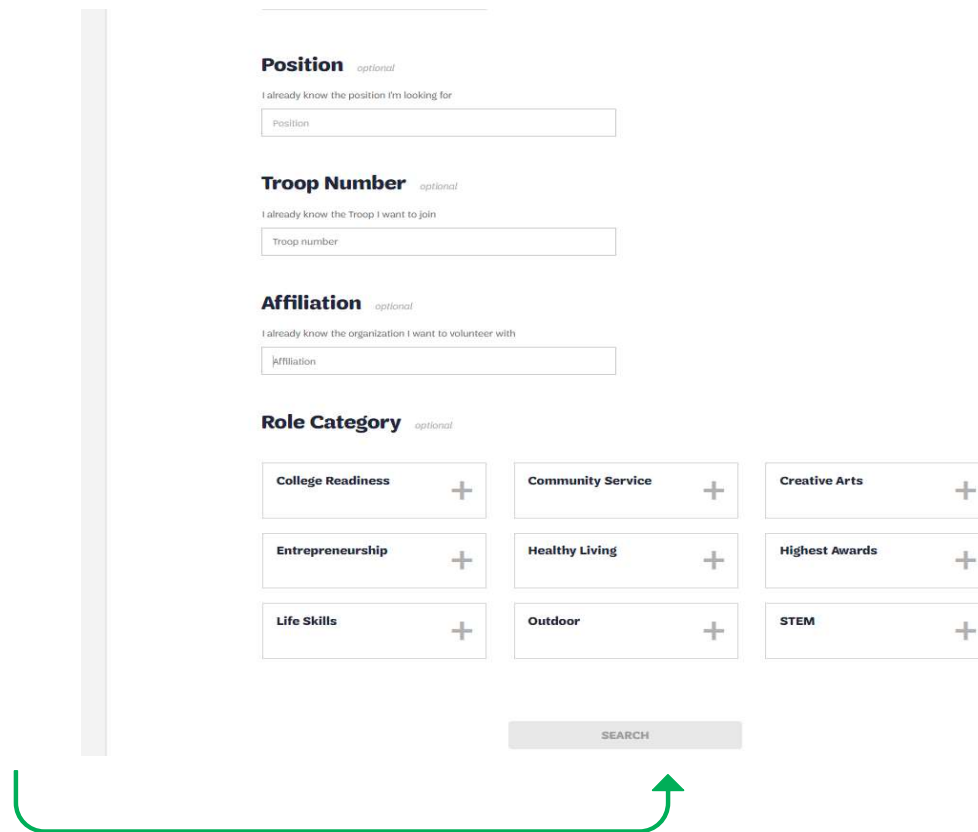
Genesis enters relevant search criteria, specifies her search radius, and selects "Search."

Full Volunteering Search Page View

Volunteer Results (1/2)

Genesis reviews the open volunteer opportunities. Roles can be configured to require a Girl Scouts membership.

Volunteer Results (2/2)

Genesis selects "Add Role" and it is added to her cart. The cart icon updates to reflect the item that has been added.

Genesis can continue browsing search results and add additional volunteer roles to her cart.

Registering for a role (1/4)

Customers can click on the Cart icon or select the "Register" button to begin the registration process.

Genesis selects the "Register" button at the bottom of the Volunteer Results page.

New adult must create an account

Registering for a role (2/4)

Genesis selects the volunteer position(s) from the drop-down list and adds her personal details.

After filling out the short form, the system will respond with an <mark>on-screen message to "check your email to activate your account"</mark> (much like other ecommerce sites.)

Once customers check their email and verify their account, they will return to the system to complete registration.

Cart Review

Genesis logs into her MY ACCOUNT to confirm that her volunteer registration is correct.

She must agree to the Girl Scouts Promise and Law BEFORE she can select SUBMIT REVIEW.

If the GS Promise and Law box is **not** checked the Submit Review will **not** become an active link to continue.
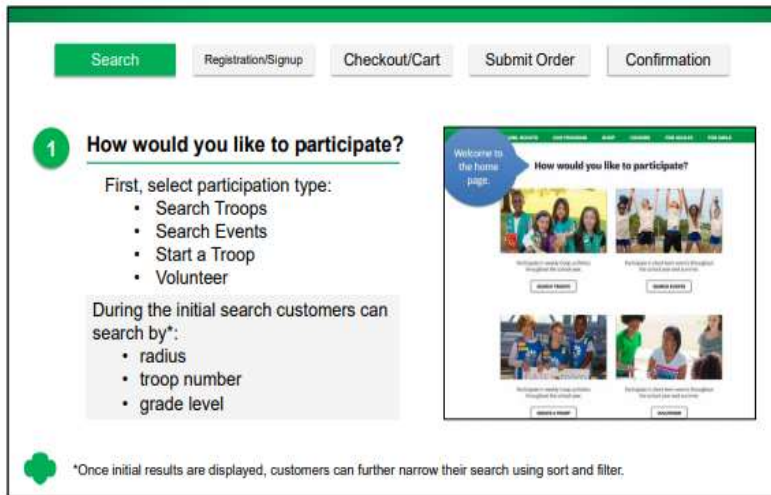
Confirmation

After Genesis completes her payment for membership a pop-up CONFIRMATION screen will show Welcome to Girl Scouts.

Registering a new GIRL

Parent can "search" for a troop and select the troop BEFORE entering ANY personal information or creating an account

Parent or Guardian will be asked to create an account before they can proceed with registering their girl

After Parent/guardian creates their account, they will then add their girl's personal information.
Next step is to complete the registration and payment. Parent will see CONFIRMATION pop up screen after payment.

Background Check

Background Check

New to Girl Scouts Volunteer:

- A volunteer who is completing a registration at the time of role designation will receive TWO emails.

  - The first email will come from council and confirm registration completion and troop role.

  - The second email will come from Sterling Volunteers with information about how to complete the background check.

Existing member with current registration:

- A volunteer that already has a membership and is adding a role that requires a background check will also receive TWO emails.

  - The first email will come from council and confirm troop role.

  - The second email will come from Sterling Volunteers with information about how to complete the background check

HELP! I didn't get an email from Sterling Volunteers!

Financial Assistance

Financial Assistance for Membership

NEW in VS 2.0- Requested by EITHER Parent or Troop Leaders

Our council is able to provide Financial Assistance through generous SHARE donations from our wonderful volunteers and friends!

Only those with a hardship should apply for Financial Assistance.

Financial Assistance for uniforms and badges has not changed. Members will continue to submit through our council link. Remember that FA for uniforms and badges is NOT available from April 16th-August 14th of each year.

27

Troop to Troop Transfer [within the same council]

Troop to Troop Transfer [within the same council]

What's new

- Families can complete their own troop to troop transfers now!

- Families can also initiate their own council to council transfers – process much more streamlined!

- Troop Leaders can initiate transfer for families.

Primary Caregiver Initiates Transfer:

- The primary caregiver can request to join a different troop from their MyAccount.
- If the receiving troop is displayed in catalog with open spots, the move does not require staff assistance or approval.
- The process will be fully automated, and the case will be closed automatically.

Primary Caregiver Initiates Transfer

Step1. Caregiver would log into their account and select manage household members.
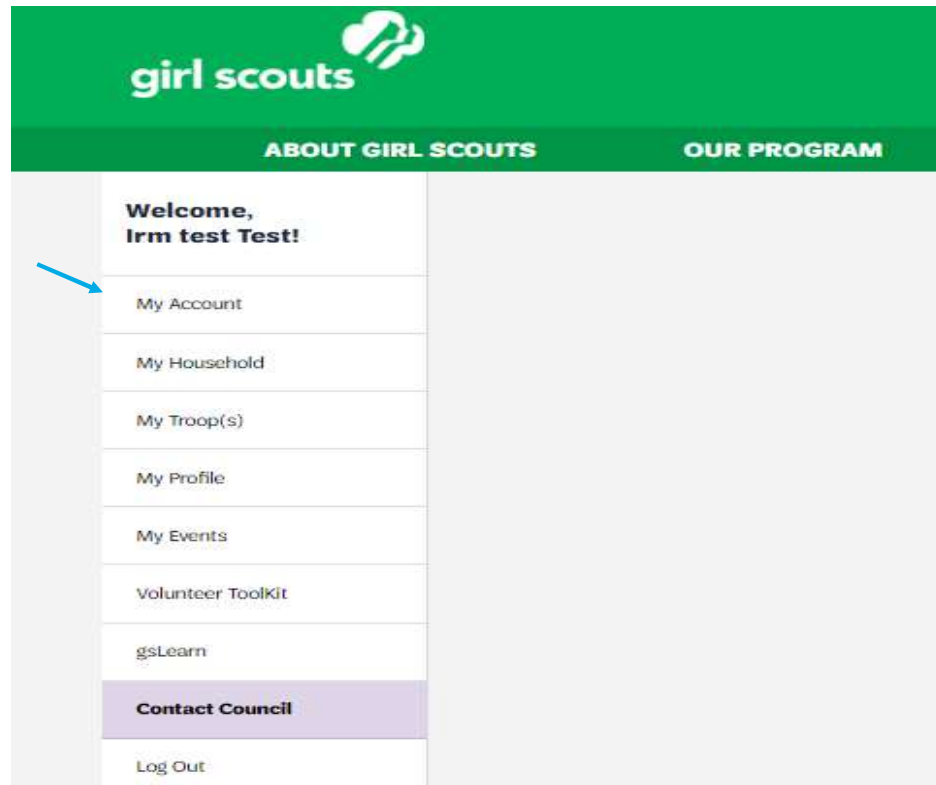
Primary Caregiver Initiates Transfer

Step 2. Caregiver selects Change Troop

32

Step 3. Caregiver enters information. Clicks Find Troop.

Who is changing troops?

Select a member of your household whose troop you would like to change.

| Pebbles Flintstone | ∨ |

Which troop would they like to leave?

Select which troop you would like the selected household member to leave.

| Troop71826 | ∨ |

Which troop would they like to join?

After selecting the troop you would like to leave, please click the button below to find the troop you'd like to transfer into.

CANCEL FIND TROOP

The search page of the troop catalog will be shown. Caregiver can search and filter for a new troop.

Step 4. Caregiver adds girl to spot in new troop.
Confirmation page will display.

Step 5. Confirm Transfer. Case will automatically close. Process complete. 34

Step 6. (Receiving Troop is not in Catalog)

If the troop is not displayed in the catalog with open spots the caregiver will need to use the back button to the search page and click on the "?" bubble at the bottom of the page to create a case.

Step 6. (Receiving Troop is not in Catalog)

If the troop is not displayed in the catalog with open spots the caregiver will need to use the back button to the search page and click on the **"?"** bubble at the bottom of the page to create a case.

‹ Back

Need help?

We want to make sure your experience is the best it can be. If you need help throughout the process, we're here for you!

Your information
Please enter your first name, last name, zip code, phone number, and email address.

First name
Wilma

Last name
Flintstone

Phone number
(654) 321-9874

Phone type
Mobile

Email address
notimegai+627@gmail.com

Zip/Postal code
08540

Country/Region
United States

Subject
Please enter the subject of your message.

Select one

Do you know the Troop number?
Troop number

Description
Please enter any relevant information to help the Council address your query.

Description

GET HELP FROM MY COUNCIL

Troop Leader Initiates on the Caregiver's Behalf

The Troop Leader can make the request on the caregiver's behalf.

A case will be generated, and the move will require review by staff.
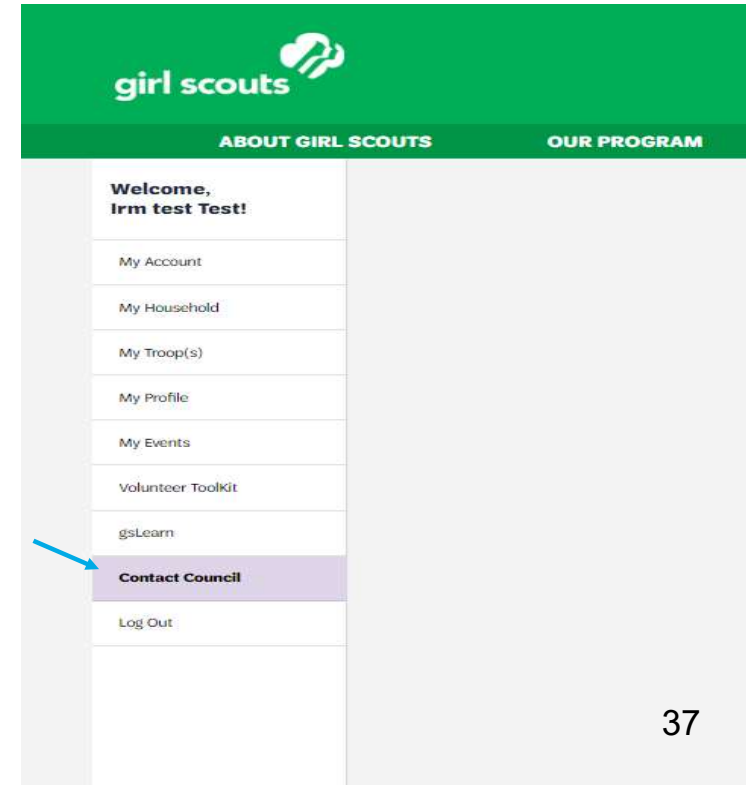
Step 1. Case is received by Membership
Step 2. Staff confirm via phone/email that caregiver has been part of the decision
to move the girl to a new troop. If the proposed new troop affiliation is unclear
gather additional info from caregiver or sending troop leader.
Step 3. Identify receiving troop and troop leader. If the case (or information gathered from step
•contains the following info, the membership staff can identify the receiving troop.

    1) If Space, transfer is processed
    2) If no space, Troop leaders MUST send email or call increasing their desired # of

Troop spots

- Troops spots and unpaid membership registration will not be reserved for any length of time and will disappear from the cart if the member navigates away

- Open slots will be filled on a first come, first serve basis

First Come First Served!

Council to Council Transfer

Council to Council Transfer

Step 1. Use the My Household link on the left navigation to view the household members.

Step 2. Click the "Change Troop" button next to the applicable member's name. (When the troop they are choosing is in another council the council transfer case will automatically generate.)

Step 3. The member name defaults in the "Who is Changing Troops" field. (Note if there is more than one person in the household the caregiver can still use the drop down to change the member selected.)

Council to Council Transfer

Step 1. Use the My Household link on the left navigation to view the household members.

Step 2. Click the "Change Troop" button next to the applicable member's name. (When the troop they are choosing is in another council the council transfer case will automatically generate.)

Step 3. The member name defaults in the "Who is Changing Troops" field. (Note if there is more than one person in the household the caregiver can still use the drop down to change the member selected.)

42

Step 4. If the member is affiliated with more than one troop, you will use the drop down in the "Which Troop They Would Like to Leave" field to select the troop she is leaving.

Step 5. To select "Which Troop Would They Like to Join" click the "Find Troop" button.

Step 6. Use the catalog search functionality to find a new troop. Click "Join This Troop."

Step 7. Click "Join this Troop" in the "*Are you sure that you would like to join Troop #####*? confirmation pop up box.

Step 8. You will arrive at the confirmation screen for one last chance to modify/review your choices. Click "confirm" on the confirmation screen.

A CASE IS CREATED FOR THE RECEIVING COUNCIL

Start a new troop

44

NEW FEATURE with VS 2.0!
Adults can request to start a troop from our council website.

Welcome to Girl Scouts,   Close ✕
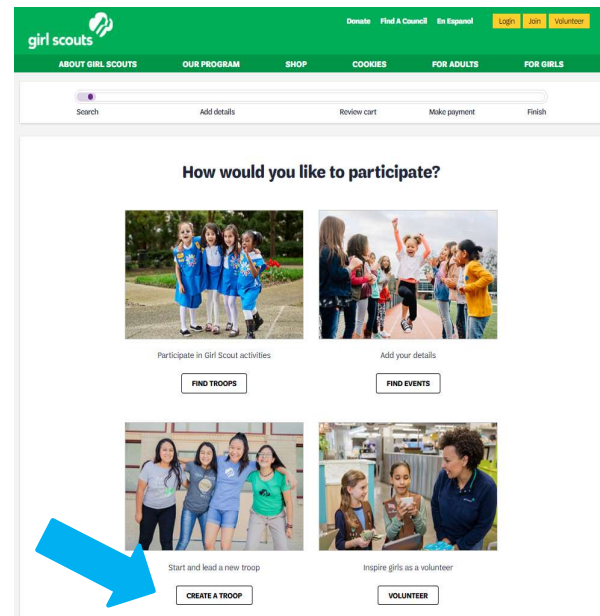
Create an account!

Building girls of
courage, confidence,
and character,
who make the world
a better place.

First name   Phone number

[First name]   [Phone number]

Last name   Zip/Postal code

[Last name]   [Zip code]

Email address

[Email address]   ☑ I agree with **GSUSA privacy policy**

                                    ☑ I agree with **terms and conditions**

Create password

[Create a password   👁]   ☐ SMS opt in - **standard data and
                                        text messaging rates
                                        apply** *(optional)*

Confirm password   ☑ Email opt in - I agree to receive
                                        emails from GSUSA *(optional)*

[Confirm password]   ☐ Phone opt in - I agree to receive
                                        **information or telemarketing
                                        from GSUSA** *(optional)*

                                    ☐ Photo opt in - I agree with **GSUSA
                                        photo policy** *(optional)*

CREATE ACCOUNT

After creating your account, you will receive a confirmation email with a
verification link.

MAKE NEW FRIENDS

Continue without an account

46

Have an account? Log in now

Create a Troop

Welcome to Girl Scouts! You're about to start on an amazing journey with your new Girl Scout troop.

Thanks to dedicated volunteers like you, generations of girls have learned to be leaders in their own lives and in the world, and we couldn't be more thrilled that you're here. Our team wants to make the troop formation process as easy as possible, so you can get to exploring, holding a leadership role within your troop, and bonding with your girls.

Not sure how to start your Troop?

Primary Adult

By providing this information you are giving Girl Scouts the right to reach out to you.

First name

| First name |

Last name

| Last name |

Phone number

| Phone number |

Phone type

| Phone type | ⌄ |

Email address

| Email address |

Zip/Postal code

| Zip code |

Country/Region

| United States | ✕ ⌄ |

Invite friends to join your Troop *optional*

Email address

| Email address |

Email address

| Email address |

Email address

| Email address |

Email address

| Email address |

Email address

| Email address |

Email address

| Email address |

Add another friend ➕

Criminal background check agreement

Please be aware that in order to form a Troop and/or become a Troop Leader, Councils reserve the right to complete both a Criminal Background Check and a Motor Vehicles Background Check.

☐ I understand that all GSUSA volunteer roles require the completion and approval of a Criminal Background Check with Motor Vehicle Record.

SUBMIT REQUEST

47
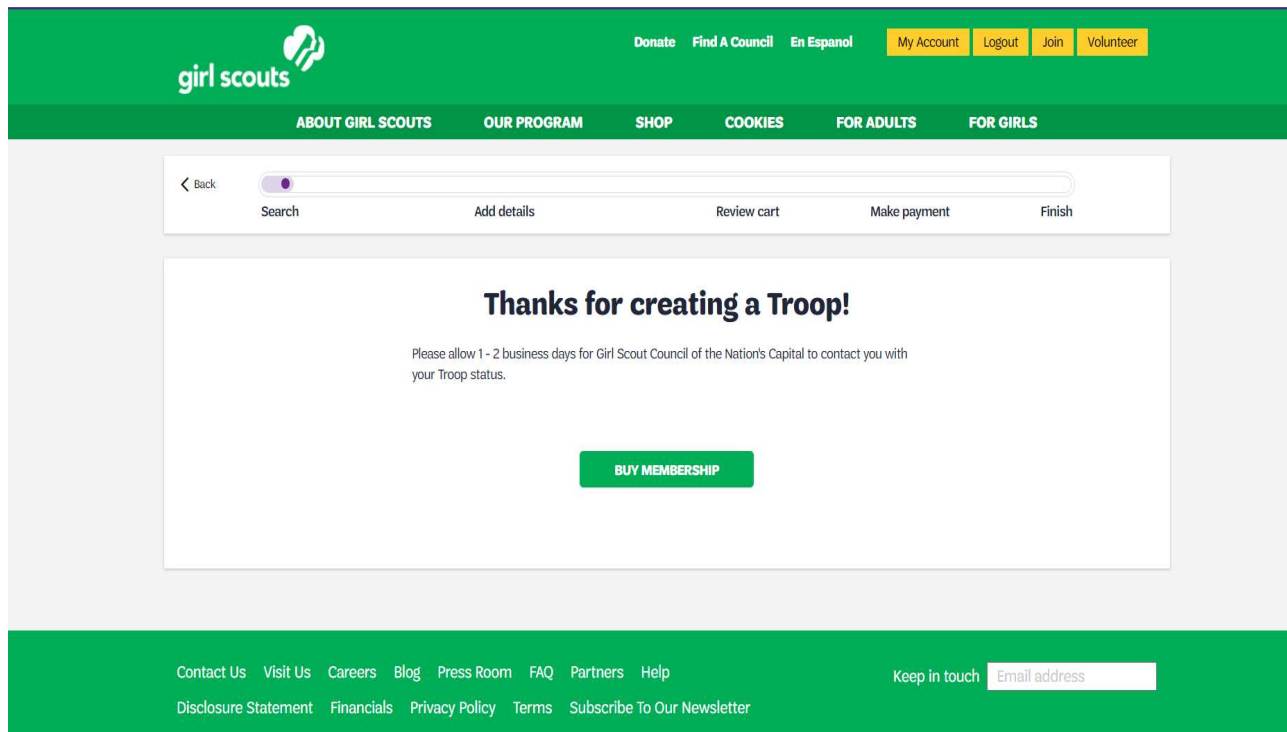
NOTE:

For areas that form troops every year, your Membership Coordinator may have non assigned troop numbers available for Troop Formation Meetings to expedite the troop creation process

Troop Request Case created in system and routed to Membership Coordinator

Membership Coordinator completes new troop request process and reaches out to assist BOTH new Troop Leaders over the phone.

Both Troop Leaders can then register into their roles & complete background screening (same process – screening email sent after registering for CBC-required role)

Once both leaders are registered & screened, troop is open for girl registration!

Membership Specialists will communicate to SU Team members when a new troop comes through the case creation option.
[directly from website]

Troop Catalog Updates

WHAT IS NEEDED?

Previous catalog data collected:

    Meeting day, time, and frequency

    Meeting location ("in the vicinity of…")

    Description ("Our troop serves girls from the …. area. Our troop enjoys…")

    Grade level

    Capacity

Additional new troop catalog data collected (starting with spring renewal 2021):

    Association (affiliation)

    Focus

    Language

    Exact meeting location

WHY IS IT IMPORTANT?

The new participation catalog makes searching for troops much easier – for families and volunteers

New troop search process includes:

| Search for troops BEFORE entering information (no more creating "fake" girls to see the catalog information) | More information in participation catalog to find better troop matches | EXCITING NEW FEATURE "Share troop" feature to share troop-specific registration link with a friend or with new families | At-a-glance view of volunteer openings – much more streamlined |

HOW TO UPDATE TROOP INFORMATION

We will continue to use the Troop Catalog Update link. The link can be found in the CWSUT Rally under the "LINKS" section.

Leaders can also reach out to their Membership Coordinator to request assistance with troop information updates.

Reports

We will continue to provide SU Registrar Reports

- We will try our best to make them look as similar as the prior report

- We will begin building the reports once everyone is in. They are in a repetitive process. We will continue to tweak the report until we get to a place where we had them in the past.

- We hope to have the first edition of the SU Registrar report out to Registrars by January ☺

- 2nd ROUNDTABLE in JANUARY to discuss reporting options

QUESTIONS