

## QUICK REFERENCE GUIDE for Club Affiliation

### Contents:

- Part 1 - General
- Part 2 – Managing and Updating Club Members
- Part 3 - Completing the Club Affiliation
- Part 4 - Making Payments
- Part 5 - Questions and Answers
- Appendix 1 -Adding a New Member
- Appendix 2 - How to remove a member who is no longer in your club
- Appendix 3 - Linking an existing SCA Member or Club Member
- Appendix 4 – Quick renewal of members
- Appendix 5 - Renewing Affiliated Club Member
- Appendix 5 – Upgrading an Affiliated Club Member to SCA Individual Member

### Part 1 - General

The purpose of this document is to provide a simple guide for Club Secretaries or Administrators to demonstrate how to complete club affiliations on SCA Self Service.

On each screen, tips are displayed on the right hand side. This helps to explain what is expected at each stage. Use the navigation buttons at the bottom to progress through the screens.

As a Club Administrator you will have access to three tiles.

- Club Details – This is where you will process the club affiliation application/renewal and later pay for the affiliation fee. This information can also be updated throughout the year.
- Club Security – To grant or remove permission to see the same three club tiles to other members. Please note this option must be used with caution and access only granted to club officials where necessary for their role.
- Club Members – This is where you will create, manage, update and remove club member details.



### Part 2 - Managing and Updating Club Members

When you log into SCA Self Service you will see the following home page.

To review and renew your Club Members use the **Club Members** Tile from the home page.

All clubs that you have access to will be displayed. You can use the **Members** icon to update and manage existing affiliated club members through the renewal process. **All members of your club must be registered with the SCA.**

- To create a new member, click 'New' from the main Club Members page and complete the registration process. **See Appendix 1.**
- To remove someone from your club, click 'delete' and they will be unlinked from your club. Their record will not be deleted from the database. **See Appendix 2.**
- To link a person who is already an SCA individual member or club member or who might already exist in the SCA database, click 'link member' and enter their SCA number, surname and Date of Birth. Alternatively you can add new members using the **New** icon. **See Appendix 3.**
- An existing member can be renewed by clicking the icon in the 'Renew' column. This icon will only be visible if the minimum data is recorded on their record (including name, address, DOB). If the renew icon is not visible, click the edit icon then review/complete the info on each screen. At the summary screen click Finish and the record will be updated.
- To renew a batch of members, tick the checkbox on the left and then click 'Bulk Renew Selected Members'. The checkbox will only be visible if the minimum data is recorded on their record (including name, address, DOB). **See Appendix 4.**

Club Admins will not initially have permission to view or edit records of SCA Individual Members as they have a direct relationship with the SCA. However, you can contact these individuals in your club and ask them to provide read only or read/write access to their record. They do this via their own 'person' tile from the Self Service home screen.

### Status descriptions

| Status                         | Description   |
|--------------------------------|---|
| Individual Member              | A person who is an SCA Individual Member (category of Full, Recreational, Supporter, Family Adult, Family U18)          |
| Indiv Member Renewal Available | As above but within the last 60 days of their membership year and can renew membership during this time.                |
| Individual Member Lapsed       | An Individual Member whose membership has now lapsed.   |
| Club Member                    | A person who is an Affiliated Club Member but not an SCA Individual Member  |
| Club Member Renewal Available  | A Club member within the last 60 days of their membership. Renewal is available (to be processed by the club secretary) |
| Inactive                       | A person who has been lapsed for more than 60 days after the expiry of their membership.                                |

Club Status:

| Status                    | Description  |
|---------------------------|--|
| Active                    | The club is currently affiliated to the SCA  |
| Active, Renewal Available | The club is currently affiliated to the SCA and is due to renew its affiliation in the near future (up to 60 days ahead)             |
| Lapsed                    | The club affiliation has now lapsed.   |
| Lapsed, DD                | A direct debit payment has been collected but the club is not affiliated as the club members and club details have not been updated. |
| Awaiting Approval         | The club is not currently affiliated but has completed the affiliation application and is waiting on approval by the SCA.            |

### Part 3 - Completing the Club Affiliation

To renew/review clubs, click on the **Club Details** tile and select the club you wish to manage. Next, review the information on the registration pages and update as required.

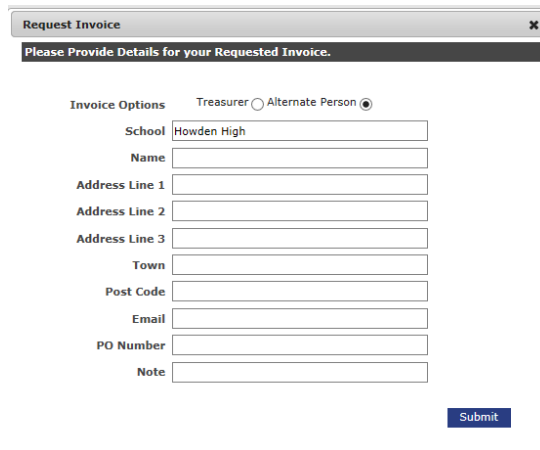
If you wish to apply for Club Affiliation for a new club for the first time, click on **Add New Club** at the bottom of the screen.

### Part 4 - Making Payments

To pay, use the **Checkout** Tile from the main menu, or the **Pay Now** button at the end of the member renewal process. You will be shown all outstanding payments. If you have multiple payments, you will have the option of choosing which payments to make.

At the checkout you may choose to pay by Credit/Debit card, set up a direct debit, create an invoice (to pay by cheque or bank transfer).

When requesting an invoice a pop up window will allow you to indicate the payer of the invoice.



Request Invoice ✕

Please Provide Details for your Requested Invoice.

Invoice Options    Treasurer  Alternate Person

School

Name

Address Line 1

Address Line 2

Address Line 3

Town

Post Code

Email










PO Number

Note

**Part 5 - Questions and Answers**

**Q: I cannot view/edit a record**

A: If the view/edit icons are not visible (example below) this means the member has not granted permission to you to view or edit their record. This will normally be due to them being an SCA Individual Member, or a Lapsed Individual Member. In the case of an existing SCA Individual Member, if you need access to their record, please contact the member directly. If the record says 'Inactive' and they are still a club member, please contact the SCA ([selfservice@canoescotland.org](mailto:selfservice@canoescotland.org)) and we will enable access to the record. Please do not delete the record and create a new member record.

| Status            | View  | Edit  | Delete  |
|-------------------|---|---|---|
| Club Member       |  |  |  |
| Club Member       |  |  |  |
| Individual Member |   |   |  |
| Inactive          |   |   |  |
| Individual Member |   |   |  |

**Q: Someone has status 'Inactive'. What does this mean and how do I fix it?**

A: This means the person's SCA Individual membership or affiliated club membership has lapsed for more than 60 days. If you do not have edit permission for this person, please first contact the SCA to reactivate this person.

**Q: How do I update club secretary/treasurer/child protection officer details?**


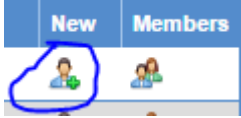

A: Click on the Club Details tile from the home page and update the information. As committee members must be club member, the list will only show existing members of the club.

**Still need help?**

If you have any enquiries, please contact **SCA** via email on [selfservice@canoescotland.org](mailto:selfservice@canoescotland.org)

**Appendix 1 - Adding a New Member**


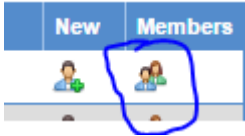
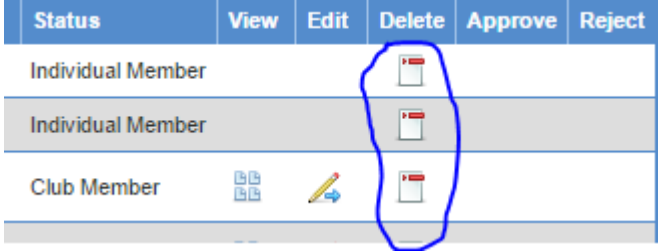
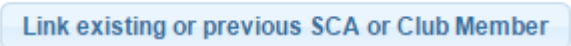
To add a new member to your club, if they are not already an SCA member or a member of another affiliated club, follow these steps:

| <p>1. Click on the Club Members tile from the home page</p>   |   |                |                           |                |                                     |        |        |                        |      |            |                        |    |                                     |      |       |            |                           |    |                                     |        |       |            |                           |    |                                     |              |       |            |                           |    |                                     |           |       |            |                           |    |                                     |
|---|--|----------------|---------------------------|----------------|-------------------------------------|--------|--------|------------------------|------|------------|------------------------|----|-------------------------------------|------|-------|------------|---------------------------|----|-------------------------------------|--------|-------|------------|---------------------------|----|-------------------------------------|--------------|-------|------------|---------------------------|----|-------------------------------------|-----------|-------|------------|---------------------------|----|-------------------------------------|
| <p>2. Click on the New icon</p>   |   |                |                           |                |                                     |        |        |                        |      |            |                        |    |                                     |      |       |            |                           |    |                                     |        |       |            |                           |    |                                     |              |       |            |                           |    |                                     |           |       |            |                           |    |                                     |
| <p>3. Enter the First name, surname, Sex, date of birth, title and then select the lookup icon next to the category field.</p>  | <p>Date of Birth <input type="text" value="25/12/1980"/> <input type="text" value="Adult"/></p> <p>Surname <input type="text" value="Person"/></p> <p>Category <input type="text"/> </p>  |                |                           |                |                                     |        |        |                        |      |            |                        |    |                                     |      |       |            |                           |    |                                     |        |       |            |                           |    |                                     |              |       |            |                           |    |                                     |           |       |            |                           |    |                                     |
| <p>4. Select the category you wish to register this person for. This is most frequently 'Affiliated Club Member' although it is possible for a club secretary to select SCA Individual Membership types and pay online. <b>If you are registering a new Individual Member via SCA Connect, choose Full, Junior or Recreational.</b></p> | <table border="1"> <thead> <tr> <th>Category</th> <th>Fee</th> <th>Effective From</th> <th>Type</th> <th>Period</th> <th>Select</th> </tr> </thead> <tbody> <tr> <td>Affiliated Club Member</td> <td>0.00</td> <td>01/01/2013</td> <td>Affiliated Club Member</td> <td>12</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Full</td> <td>35.00</td> <td>01/01/2013</td> <td>Primary Individual Member</td> <td>12</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Junior</td> <td>17.00</td> <td>01/01/2013</td> <td>Primary Individual Member</td> <td>12</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Recreational</td> <td>24.00</td> <td>01/01/2013</td> <td>Primary Individual Member</td> <td>12</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Supporter</td> <td>16.00</td> <td>01/01/2013</td> <td>Primary Individual Member</td> <td>12</td> <td><input checked="" type="checkbox"/></td> </tr> </tbody> </table> | Category       | Fee                       | Effective From | Type                                | Period | Select | Affiliated Club Member | 0.00 | 01/01/2013 | Affiliated Club Member | 12 | <input checked="" type="checkbox"/> | Full | 35.00 | 01/01/2013 | Primary Individual Member | 12 | <input checked="" type="checkbox"/> | Junior | 17.00 | 01/01/2013 | Primary Individual Member | 12 | <input checked="" type="checkbox"/> | Recreational | 24.00 | 01/01/2013 | Primary Individual Member | 12 | <input checked="" type="checkbox"/> | Supporter | 16.00 | 01/01/2013 | Primary Individual Member | 12 | <input checked="" type="checkbox"/> |
| Category  | Fee  | Effective From | Type                      | Period         | Select                              |        |        |                        |      |            |                        |    |                                     |      |       |            |                           |    |                                     |        |       |            |                           |    |                                     |              |       |            |                           |    |                                     |           |       |            |                           |    |                                     |
| Affiliated Club Member  | 0.00   | 01/01/2013     | Affiliated Club Member    | 12             | <input checked="" type="checkbox"/> |        |        |                        |      |            |                        |    |                                     |      |       |            |                           |    |                                     |        |       |            |                           |    |                                     |              |       |            |                           |    |                                     |           |       |            |                           |    |                                     |
| Full  | 35.00  | 01/01/2013     | Primary Individual Member | 12             | <input checked="" type="checkbox"/> |        |        |                        |      |            |                        |    |                                     |      |       |            |                           |    |                                     |        |       |            |                           |    |                                     |              |       |            |                           |    |                                     |           |       |            |                           |    |                                     |
| Junior  | 17.00  | 01/01/2013     | Primary Individual Member | 12             | <input checked="" type="checkbox"/> |        |        |                        |      |            |                        |    |                                     |      |       |            |                           |    |                                     |        |       |            |                           |    |                                     |              |       |            |                           |    |                                     |           |       |            |                           |    |                                     |
| Recreational  | 24.00  | 01/01/2013     | Primary Individual Member | 12             | <input checked="" type="checkbox"/> |        |        |                        |      |            |                        |    |                                     |      |       |            |                           |    |                                     |        |       |            |                           |    |                                     |              |       |            |                           |    |                                     |           |       |            |                           |    |                                     |
| Supporter   | 16.00  | 01/01/2013     | Primary Individual Member | 12             | <input checked="" type="checkbox"/> |        |        |                        |      |            |                        |    |                                     |      |       |            |                           |    |                                     |        |       |            |                           |    |                                     |              |       |            |                           |    |                                     |           |       |            |                           |    |                                     |
| <p>5. Enter an address / phone number for the person.</p>   | <p>Address <input type="text" value="Any Street"/> <input type="text"/></p> <p>Town <input type="text" value="Any Town"/></p> <p>County <input type="text" value="Any County"/></p> <p>Post Code <input type="text" value="AB12 4CD"/></p> <p>Primary Number <input type="text" value="0123456789"/></p> <p>Work Number <input type="text" value="0123456789"/></p> <p>Home Number <input type="text" value="0123456789"/></p> <p>Other Number <input type="text"/></p> <p>Mobile Number <input type="text"/></p> <p>Email Address <input type="text"/></p>  |                |                           |                |                                     |        |        |                        |      |            |                        |    |                                     |      |       |            |                           |    |                                     |        |       |            |                           |    |                                     |              |       |            |                           |    |                                     |           |       |            |                           |    |                                     |
| <p>6. Click NEXT</p> <p>7. Note that clicking Save and Exit will save the basic record and link the person to your club but they are not registered as a member and are not covered by SCA insurance.</p>   | <p><input type="button" value="Save and Exit"/> <input checked="" type="button" value="Next"/></p>   |                |                           |                |                                     |        |        |                        |      |            |                        |    |                                     |      |       |            |                           |    |                                     |        |       |            |                           |    |                                     |              |       |            |                           |    |                                     |           |       |            |                           |    |                                     |
| <p>8. It is not necessary to enter any emergency contact details on the next page if you don't wish to.</p> <p>9. Click NEXT</p>  | <p><input type="button" value="Next"/></p>   |                |                           |                |                                     |        |        |                        |      |            |                        |    |                                     |      |       |            |                           |    |                                     |        |       |            |                           |    |                                     |              |       |            |                           |    |                                     |           |       |            |                           |    |                                     |

| <p>10. On the Clubs page, the person will already be linked to your club.</p> <p>11. Click Next</p>  | <table border="1"> <thead> <tr> <th>Primary Club</th> <th>Permission Type</th> <th>Club Status</th> <th>Person Status</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>ReadWrite</td> <td>Confirmed</td> <td>Confirmed</td> <td><a href="#">Edit</a><br/><a href="#">Remove</a></td> </tr> </tbody> </table> | Primary Club | Permission Type | Club Status                                    | Person Status | Actions | <input checked="" type="checkbox"/> | ReadWrite | Confirmed | Confirmed | <a href="#">Edit</a><br><a href="#">Remove</a> |
|--|--|--------------|-----------------|--|---------------|---------|-------------------------------------|-----------|-----------|-----------|--|
| Primary Club   | Permission Type  | Club Status  | Person Status   | Actions  |               |         |                                     |           |           |           |  |
| <input checked="" type="checkbox"/>  | ReadWrite  | Confirmed    | Confirmed       | <a href="#">Edit</a><br><a href="#">Remove</a> |               |         |                                     |           |           |           |  |
| <p>12. If you have any attachments to upload, do this via the attachments page. Otherwise, click Next</p>  | <p><a href="#">Next</a></p>  |              |                 |  |               |         |                                     |           |           |           |  |
| <p>13. On the communications page, if the member wishes to opt in to receiving emails from the SCA, tick the relevant box.</p> <p>14. Click NEXT</p>   | <p><b>Electronic Marketing</b></p> <p>We would also like to send you information about SCA activit selected third parties (including SCA Affiliated Clubs, SCA cc to being contacted in this way, please tick the box: <input type="checkbox"/></p>  |              |                 |  |               |         |                                     |           |           |           |  |
| <p>15. On the <i>Interested In</i> page, simply click next unless you know which specific courses the member may be interested in</p>  | <p><a href="#">Next</a></p>  |              |                 |  |               |         |                                     |           |           |           |  |
| <p>16. On the summary page, tick to confirm the person is a member of your club</p>  | <p>Please read the declarations statements and tick the relevant sentences if you agree with the statements. By ticking the declarations, you are acknowledging and confirming that the statement is correct.</p> <p><input type="checkbox"/> I confirm this individual is a member of the club.</p>   |              |                 |  |               |         |                                     |           |           |           |  |
| <p>17. Click Finish. The person is now registered with the SCA as a member of your club.</p> <p>18. If you have selected an SCA Individual Membership category you should now proceed to payment and either request an invoice (if you wish to pay by bank transfer or cheque), or pay online (if you wish to pay by credit/debit card).</p> | <p><a href="#">Finish</a></p>  |              |                 |  |               |         |                                     |           |           |           |  |


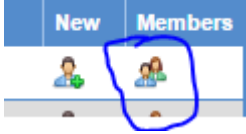

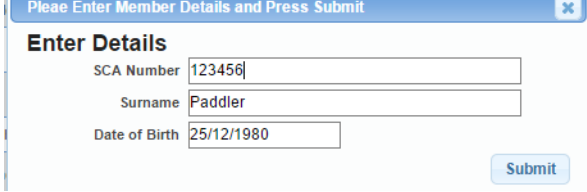
**Appendix 2 - How to remove a member who is no longer in your club**

If someone is no longer a member of your club, whether they are an SCA Individual Member or an Affiliated Club Member, the process is as follows:

| <p>1. Click on the Club Members tile from the home page</p>  |   |        |        |         |        |         |        |                   |  |  |  |  |  |                   |  |  |  |  |  |             |  |  |  |  |  |
|--|---|--------|--------|---------|--------|---------|--------|-------------------|--|--|--|--|--|-------------------|--|--|--|--|--|-------------|--|--|--|--|--|
| <p>2. Click on the Members icon</p>  |   |        |        |         |        |         |        |                   |  |  |  |  |  |                   |  |  |  |  |  |             |  |  |  |  |  |
| <p>3. Identify the line for the person no longer in the club and click the delete icon.</p>  |  <table border="1" data-bbox="772 775 1433 1025"> <thead> <tr> <th>Status</th> <th>View</th> <th>Edit</th> <th>Delete</th> <th>Approve</th> <th>Reject</th> </tr> </thead> <tbody> <tr> <td>Individual Member</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Individual Member</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Club Member</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> | Status | View   | Edit    | Delete | Approve | Reject | Individual Member |  |  |  |  |  | Individual Member |  |  |  |  |  | Club Member |  |  |  |  |  |
| Status   | View  | Edit   | Delete | Approve | Reject |         |        |                   |  |  |  |  |  |                   |  |  |  |  |  |             |  |  |  |  |  |
| Individual Member  |   |        |        |         |        |         |        |                   |  |  |  |  |  |                   |  |  |  |  |  |             |  |  |  |  |  |
| Individual Member  |   |        |        |         |        |         |        |                   |  |  |  |  |  |                   |  |  |  |  |  |             |  |  |  |  |  |
| Club Member  |   |        |        |         |        |         |        |                   |  |  |  |  |  |                   |  |  |  |  |  |             |  |  |  |  |  |
| <p>4. The person is now removed from your club although their record is not deleted and their membership status is not affected if they are an SCA Individual Member. If you wish to relink them in the future you will need to know the SCA number, surname and Date of Birth. Click the 'Link existing or previous SCA or Club Member' from the Club Members page.</p> |   |        |        |         |        |         |        |                   |  |  |  |  |  |                   |  |  |  |  |  |             |  |  |  |  |  |

**Appendix 3 - Linking an existing SCA Member or Club Member**


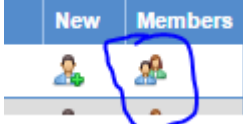

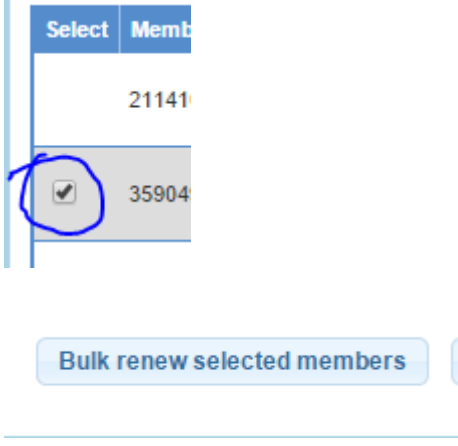
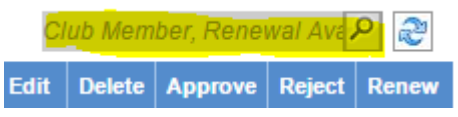
If you wish to register someone to your club who is already an SCA Individual Member, a member of another Affiliated Club or they have previously been either of the above, there is no need to create a new record. You will first need to know their current/previous SCA number, surname and date of birth.

|  |   |
|--|---|
| <p>1. Click on the Club Members tile from the home page</p>  |    |
| <p>2. Click on the Members icon</p>  |    |
| <p>3. Click on <i>Link existing or previous SCA or Club Member</i> button (bottom right)</p>   |   |
| <p>4. Enter the SCA number, Surname and Date of Birth.</p> <p>5. Press submit.</p> <p>6. The person will now receive an email from the SCA asking them to confirm they are a member of the club. You will not be able to view or edit their record until they give you permission.</p> |  |




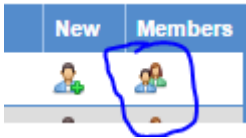

**Appendix 4 – Quick Renewal of Members**


To quick renew members of your club, or bulk renew a batch of members, follow the instructions below. Please note this option is only available for records containing the minimum information including first and last name, date of birth, gender, address and postcode. If any of this information is missing, please refer to Appendix 5 for full instructions.

|  |  |
|--|--|
| <p>1. Click on the Club Members tile from the home page</p>  |     |
| <p>2. Click on the Members icon</p>  |     |
| <p>3. To renew one member, click the Renew icon on the RIGHT of the table of members. Use the page navigation or search bar to identify specific members.</p> <p>4. The individuals are now re-registered with the SCA as Affiliated Club Members (providing their status is now Club Member).</p>   |    |
| <p>5. To renew a batch of members, tick the checkboxes next to their names on the LEFT then click the 'Bulk Renew selected members' button at the bottom of the screen. Follow the on screen prompts.</p> <p>6. The individuals are now re-registered with the SCA as Affiliated Club Members (providing their status is now Club Member).</p> |  |
| <p>7. To help identify the members who are not yet renewed, use the search bar – e.g type "Club Member, Renewal Available" to see a list of all those who have still to be renewed. (or "Club Member Lapsed" if you are renewing the club late.</p>  |  |

**Appendix 5 - Renewing Affiliated Club Member**

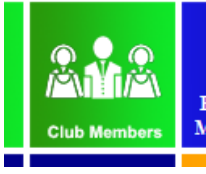
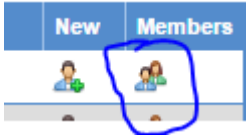

To renew the affiliated club membership of an existing club member

| <p>1. Click on the Club Members tile from the home page</p>                               |   |                |                           |                |                                     |        |                        |                                |      |            |                        |                        |                                     |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |
|---|--|----------------|---------------------------|----------------|-------------------------------------|--------|------------------------|--------------------------------|------|------------|------------------------|------------------------|-------------------------------------|------|-------|------------|---------------------------|--------------------------------|-------------------------------------|--------|-------|------------|---------------------------|----|-------------------------------------|--------------|------------------------|--------------------------------|---------------------------|----|-------------------------------------|------------------------|--------------------------------|------------|---------------------------|----|-------------------------------------|
| <p>2. Click on the Members icon</p>   |   |                |                           |                |                                     |        |                        |                                |      |            |                        |                        |                                     |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |
| <p>3. Click on the Edit icon for the member you wish to renew.</p>                        | <table border="1"> <thead> <tr> <th>Category</th> <th>Status</th> <th>View</th> <th>Edit</th> <th>Delete</th> </tr> </thead> <tbody> <tr> <td>Affiliated Club Member</td> <td>Club Member, Renewal Available</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Affiliated Club Member</td> <td>Club Member, Renewal Available</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Affiliated Club Member</td> <td>Club Member, Renewal Available</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Full</td> <td>Individual Member</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Affiliated Club Member</td> <td>Club Member, Renewal Available</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Affiliated Club Member</td> <td>Club Member, Renewal Available</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>  | Category       | Status                    | View           | Edit                                | Delete | Affiliated Club Member | Club Member, Renewal Available |      |            |                        | Affiliated Club Member | Club Member, Renewal Available      |      |       |            | Affiliated Club Member    | Club Member, Renewal Available |                                     |        |       | Full       | Individual Member         |    |                                     |              | Affiliated Club Member | Club Member, Renewal Available |                           |    |                                     | Affiliated Club Member | Club Member, Renewal Available |            |                           |    |                                     |
| Category  | Status   | View           | Edit                      | Delete         |                                     |        |                        |                                |      |            |                        |                        |                                     |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |
| Affiliated Club Member  | Club Member, Renewal Available   |                |                           |                |                                     |        |                        |                                |      |            |                        |                        |                                     |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |
| Affiliated Club Member  | Club Member, Renewal Available   |                |                           |                |                                     |        |                        |                                |      |            |                        |                        |                                     |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |
| Affiliated Club Member  | Club Member, Renewal Available   |                |                           |                |                                     |        |                        |                                |      |            |                        |                        |                                     |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |
| Full  | Individual Member  |                |                           |                |                                     |        |                        |                                |      |            |                        |                        |                                     |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |
| Affiliated Club Member  | Club Member, Renewal Available   |                |                           |                |                                     |        |                        |                                |      |            |                        |                        |                                     |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |
| Affiliated Club Member  | Club Member, Renewal Available   |                |                           |                |                                     |        |                        |                                |      |            |                        |                        |                                     |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |
| <p>4. If applicable, change the Membership Category. Otherwise click Next</p>             | <table border="1"> <thead> <tr> <th>Category</th> <th>Fee</th> <th>Effective From</th> <th>Type</th> <th>Period</th> <th>Select</th> </tr> </thead> <tbody> <tr> <td>Affiliated Club Member</td> <td>0.00</td> <td>01/01/2013</td> <td>Affiliated Club Member</td> <td>12</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Full</td> <td>35.00</td> <td>01/01/2013</td> <td>Primary Individual Member</td> <td>12</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Junior</td> <td>17.00</td> <td>01/01/2013</td> <td>Primary Individual Member</td> <td>12</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Recreational</td> <td>24.00</td> <td>01/01/2013</td> <td>Primary Individual Member</td> <td>12</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Supporter</td> <td>16.00</td> <td>01/01/2013</td> <td>Primary Individual Member</td> <td>12</td> <td><input checked="" type="checkbox"/></td> </tr> </tbody> </table> | Category       | Fee                       | Effective From | Type                                | Period | Select                 | Affiliated Club Member         | 0.00 | 01/01/2013 | Affiliated Club Member | 12                     | <input checked="" type="checkbox"/> | Full | 35.00 | 01/01/2013 | Primary Individual Member | 12                             | <input checked="" type="checkbox"/> | Junior | 17.00 | 01/01/2013 | Primary Individual Member | 12 | <input checked="" type="checkbox"/> | Recreational | 24.00                  | 01/01/2013                     | Primary Individual Member | 12 | <input checked="" type="checkbox"/> | Supporter              | 16.00                          | 01/01/2013 | Primary Individual Member | 12 | <input checked="" type="checkbox"/> |
| Category  | Fee  | Effective From | Type                      | Period         | Select                              |        |                        |                                |      |            |                        |                        |                                     |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |
| Affiliated Club Member  | 0.00   | 01/01/2013     | Affiliated Club Member    | 12             | <input checked="" type="checkbox"/> |        |                        |                                |      |            |                        |                        |                                     |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |
| Full  | 35.00  | 01/01/2013     | Primary Individual Member | 12             | <input checked="" type="checkbox"/> |        |                        |                                |      |            |                        |                        |                                     |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |
| Junior  | 17.00  | 01/01/2013     | Primary Individual Member | 12             | <input checked="" type="checkbox"/> |        |                        |                                |      |            |                        |                        |                                     |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |
| Recreational  | 24.00  | 01/01/2013     | Primary Individual Member | 12             | <input checked="" type="checkbox"/> |        |                        |                                |      |            |                        |                        |                                     |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |
| Supporter   | 16.00  | 01/01/2013     | Primary Individual Member | 12             | <input checked="" type="checkbox"/> |        |                        |                                |      |            |                        |                        |                                     |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |
| <p>5. Review the information on each page, clicking Next to progress to the next page</p> |    |                |                           |                |                                     |        |                        |                                |      |            |                        |                        |                                     |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |
| <p>6. On the summary page, tick to confirm the person is a member of your club</p>        | <p>Please read the declarations statements and tick the relevant sentences if you agree with the statements. By ticking the declarations, you are acknowledging and confirming that the statement is correct.</p> <p><input checked="" type="checkbox"/> I confirm this individual is a member of the club.</p>  |                |                           |                |                                     |        |                        |                                |      |            |                        |                        |                                     |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |

|   |   |
|---|---|
| <p>7. Click Finish. The person is now renewed with the SCA as a member of your club.</p>  |  |
| <p>8. Repeat the steps above until you have renewed all members of your club. All people listed should have one of the following Status:</p> <ul style="list-style-type: none"><li>a. Individual Member</li><li>b. Individual Member, Renewal Available</li><li>c. Club Member</li><li>d. Club Member Renewed Early</li></ul> |   |

**Appendix 5 – Upgrading an Affiliated Club Member to SCA Individual Member**

To upgrade an existing affiliated club membership to an SCA Individual Member as part of SCA Connect, follow the instructions below.

| <p>1. Click on the Club Members tile from the home page</p>                               |    |                |                           |                |                                     |        |                        |                                |      |            |                        |                        |                                |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |
|---|---|----------------|---------------------------|----------------|-------------------------------------|--------|------------------------|--------------------------------|------|------------|------------------------|------------------------|--------------------------------|------|-------|------------|---------------------------|--------------------------------|-------------------------------------|--------|-------|------------|---------------------------|----|-------------------------------------|--------------|------------------------|--------------------------------|---------------------------|----|-------------------------------------|------------------------|--------------------------------|------------|---------------------------|----|-------------------------------------|
| <p>2. Click on the Members icon</p>   |    |                |                           |                |                                     |        |                        |                                |      |            |                        |                        |                                |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |
| <p>3. Click on the Edit icon for the member you wish to upgrade.</p>                      | <table border="1"> <thead> <tr> <th>Category</th> <th>Status</th> <th>View</th> <th>Edit</th> <th>Delete</th> </tr> </thead> <tbody> <tr> <td>Affiliated Club Member</td> <td>Club Member, Renewal Available</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Affiliated Club Member</td> <td>Club Member, Renewal Available</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Affiliated Club Member</td> <td>Club Member, Renewal Available</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Full</td> <td>Individual Member</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Affiliated Club Member</td> <td>Club Member, Renewal Available</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Affiliated Club Member</td> <td>Club Member, Renewal Available</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>   | Category       | Status                    | View           | Edit                                | Delete | Affiliated Club Member | Club Member, Renewal Available |      |            |                        | Affiliated Club Member | Club Member, Renewal Available |      |       |            | Affiliated Club Member    | Club Member, Renewal Available |                                     |        |       | Full       | Individual Member         |    |                                     |              | Affiliated Club Member | Club Member, Renewal Available |                           |    |                                     | Affiliated Club Member | Club Member, Renewal Available |            |                           |    |                                     |
| Category  | Status  | View           | Edit                      | Delete         |                                     |        |                        |                                |      |            |                        |                        |                                |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |
| Affiliated Club Member  | Club Member, Renewal Available  |                |                           |                |                                     |        |                        |                                |      |            |                        |                        |                                |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |
| Affiliated Club Member  | Club Member, Renewal Available  |                |                           |                |                                     |        |                        |                                |      |            |                        |                        |                                |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |
| Affiliated Club Member  | Club Member, Renewal Available  |                |                           |                |                                     |        |                        |                                |      |            |                        |                        |                                |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |
| Full  | Individual Member   |                |                           |                |                                     |        |                        |                                |      |            |                        |                        |                                |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |
| Affiliated Club Member  | Club Member, Renewal Available  |                |                           |                |                                     |        |                        |                                |      |            |                        |                        |                                |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |
| Affiliated Club Member  | Club Member, Renewal Available  |                |                           |                |                                     |        |                        |                                |      |            |                        |                        |                                |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |
| <p>4. Select their new category from the lookup list. Click Next</p>                      | <table border="1"> <thead> <tr> <th>Category</th> <th>Fee</th> <th>Effective From</th> <th>Type</th> <th>Period</th> <th>Select</th> </tr> </thead> <tbody> <tr> <td>Affiliated Club Member</td> <td>0.00</td> <td>01/01/2013</td> <td>Affiliated Club Member</td> <td>12</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Full</td> <td>35.00</td> <td>01/01/2013</td> <td>Primary Individual Member</td> <td>12</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Junior</td> <td>17.00</td> <td>01/01/2013</td> <td>Primary Individual Member</td> <td>12</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Recreational</td> <td>24.00</td> <td>01/01/2013</td> <td>Primary Individual Member</td> <td>12</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Supporter</td> <td>16.00</td> <td>01/01/2013</td> <td>Primary Individual Member</td> <td>12</td> <td><input checked="" type="checkbox"/></td> </tr> </tbody> </table> | Category       | Fee                       | Effective From | Type                                | Period | Select                 | Affiliated Club Member         | 0.00 | 01/01/2013 | Affiliated Club Member | 12                     | <input type="checkbox"/>       | Full | 35.00 | 01/01/2013 | Primary Individual Member | 12                             | <input checked="" type="checkbox"/> | Junior | 17.00 | 01/01/2013 | Primary Individual Member | 12 | <input checked="" type="checkbox"/> | Recreational | 24.00                  | 01/01/2013                     | Primary Individual Member | 12 | <input checked="" type="checkbox"/> | Supporter              | 16.00                          | 01/01/2013 | Primary Individual Member | 12 | <input checked="" type="checkbox"/> |
| Category  | Fee   | Effective From | Type                      | Period         | Select                              |        |                        |                                |      |            |                        |                        |                                |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |
| Affiliated Club Member  | 0.00  | 01/01/2013     | Affiliated Club Member    | 12             | <input type="checkbox"/>            |        |                        |                                |      |            |                        |                        |                                |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |
| Full  | 35.00   | 01/01/2013     | Primary Individual Member | 12             | <input checked="" type="checkbox"/> |        |                        |                                |      |            |                        |                        |                                |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |
| Junior  | 17.00   | 01/01/2013     | Primary Individual Member | 12             | <input checked="" type="checkbox"/> |        |                        |                                |      |            |                        |                        |                                |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |
| Recreational  | 24.00   | 01/01/2013     | Primary Individual Member | 12             | <input checked="" type="checkbox"/> |        |                        |                                |      |            |                        |                        |                                |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |
| Supporter   | 16.00   | 01/01/2013     | Primary Individual Member | 12             | <input checked="" type="checkbox"/> |        |                        |                                |      |            |                        |                        |                                |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |
| <p>5. Review the information on each page, clicking Next to progress to the next page</p> |   |                |                           |                |                                     |        |                        |                                |      |            |                        |                        |                                |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |
| <p>6. On the summary page, tick to confirm the person is a member of your club</p>        | <p>Please read the declarations statements and tick the relevant sentences if you agree with the statements. By ticking the declarations, you are acknowledging and confirming that the statement is correct.</p> <p><input checked="" type="checkbox"/> I confirm this individual is a member of the club.</p>   |                |                           |                |                                     |        |                        |                                |      |            |                        |                        |                                |      |       |            |                           |                                |                                     |        |       |            |                           |    |                                     |              |                        |                                |                           |    |                                     |                        |                                |            |                           |    |                                     |

|   |   |
|---|---|
| 7. Click Pay Now or Pay Later.  | <input type="button" value="Pay Now"/> <input type="button" value="Pay Later"/> |
| 8. Proceed to payment and follow the instructions in section 4 to make the payment. Note – it is the responsibility of the club to make the payment to the SCA. |   |