

# SCOUT MEMBERSHIP ALERT PROJECT DEFINITION

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# Scouts Member Alert

## Project Definition

**Previously called “Caution Flag”. The alternate name of *Member Alert* is suggested to engender its use for more than just child protection concerns.**

### Overview

The Alerts system maintains a central record of members for whom there is information that should be considered before granting membership. Such information may be child protection related or it could relate to behavior, money handling or something else.

The alert information itself is not centrally recorded. The background may in fact only exist as a paper record at a Branch. A successful search simply advises that there is information that should be sought about this person and which Branch to contact for details.

The system will provide screens for both recording and searching functions. However, to eliminate additional administration by Branches and ensure that every adult applicant is tested against the Alerts records, an API will be provided. Once integrated within a Branch membership system, Alert searches will be fully automated.

Searching will be on several levels of decreasing confidence. A “perfect” match would be on first name, last name, gender and DOB. A low possibility match would be on mobile phone number only.

## Project Investment

For budget purposes this project was originally estimated as follows:

#	Name	Summary	Estimate	Remarks 14 Oct 16
40322	Secure Admin Facility	A very restricted admin facility to record necessary search information for a member and to note a "refer to XYZ branch" advice. Incorporates a search facility.	\$5,400	<i>Could be as low as \$3,500 but the strict Branch level data access restrictions that need to be overridden for a national search (for this tool only) could easily consume the extra budget.</i>
40315	Caution Flag API	API to simplify use of the inter-branch caution flag system. Upon entry of a new leader application the API can contact the system and return either "no match" or "Possible match - click here to search"  A caution flag on Branch membership records will cause a caution warning to be shared with no further effort.	\$3,600	<i>Project definition has been reviewed by a senior programmer and estimate is considered "about right" including the thorough testing that will be needed.</i>
			<b>\$9,000</b>	

Having now defined the project in detail, the original estimate has been reviewed – refer comments above.

**MindVision will guarantee that the project will not exceed the \$9,000 estimated (+GST).** If the planets align and security poses no special challenges then savings may be made. MindVision will pass any savings onto Scouts.

### Implementation cost for Branches

Once the API is released, implementation within branch membership systems is very straightforward.

To implement within MyScout, MindVision estimates around 6 hours (approx. \$1,000). This should be indicative for other Membership systems as well.

There is no need for immediate implementation. There is a current "offline" process in use and the new Member Alert system can simply replace it. The attraction is that Branches will have the option of automating alert checking when they are ready to implement it.

## Data Capture

### Member Record (existing data table)

members.scouts.com.au captures the following data about a member:

Field	Remark
Member ID	Unique identifier
Member Number	Branch issued unique number
Branch	
Youth Section	
Gender	
First Name	
Last Name	
Date of Birth	
Email	
Mobile	
Postcode	
Active	(yes or no)

### MemberAlert (new data table)

Member Alerts will be recorded in a separate data table that connects to the member record but is visible only to selected users:

Field	Remark
Branch	Branch that posted the Alert
Member ID	Link to a member record
Date Alert Added	
Alert Added By	Name of user who added the alert
Date Alert Removed	
Alert Removed By	Name of user who added the alert
Child Protection Related (Boolean)	True indicates that this alert is child protection related. False indicates an alert for any other reason.

## Alert Recording Screen

### Step 1. Retrieve the correct member

1. User enters a Membership Number
2. System displays Member Record and Current Appointments (if any)
3. All OPEN Alerts on record for this member are displayed
4. Alerts posted by the User's Branch can be edited (removed).
5. Search results is limited to past and present members of the Branch.

### Step 2. Add an Alert

Fields are displayed for the user to record the above data

## Alert Search Screen

The objective of this screen is to search for any alerts recorded against a Person by any branch. Unlike normal security that restricts access to only members of the user's branch, this search will span ALL records.

The following search inputs will be provided.

- First Name
- Preferred Name
- Last Name
- Gender
- Date of Birth
- Mobile (optional)

The system will execute several searches of reducing quality...

1	First Name or Preferred Name against First Name, Last Name, Gender, Date of Birth	Very High
2	First Name or Preferred Name against First Name, Last Name, Date of Birth	High
3	Mobile, Gender, Date of Birth	High
4	Mobile, Date of Birth	Medium
5	Last Name, Gender, Date of Birth	Possible
6	Mobile	Low

Search results will display in order of quality as per the following example.

*Most times a match will not be found but the example below shows how the system will cope with multiple possible matches based on the above searches. The yellow highlight indicates the fields that were matched.*

Last Name	First Name	Gender	Date of Birth	Mobile	Branch	Child Protection Related	Match Quality	Enquire
<b>Bates</b>	<b>Christopher</b>	<b>M</b>	<b>22 Feb 1907</b>	0400 123456	SA	No	Very High	[ENQ]
<b>Bates</b>	<b>Chris</b>	F	<b>22 Feb 1907</b>		ACT	Yes	High	[ENQ]
Bateshon	George	<b>M</b>	<b>22 Feb 1907</b>	<b>0400 123456</b>	SA	No	High	[ENQ]
Alias	Iman	M	<b>22 Feb 1907</b>	<b>0400 123456</b>	VIC	Yes	Medium	[ENQ]
<b>Bates</b>	Donald	<b>M</b>	<b>22 Feb 1907</b>	0412 654879	QLD	No	Possible	[ENQ]
Hornblower	Admiral	M	15 Mar 1845	<b>0400 123456</b>	NSW	No	Low	[ENQ]

## Enquiry Function

The **Enquire** button on search results will populate an email to the Branch via the user's own email application. This is only the start of the message. The user is expected to complete the email.

**Subject:** Member Alert Enquiry

\*\*\* Attention SA Branch Confidential \*\*\*

Membership Number: 39827  
 First Name: Christopher  
 Last Name: Bates  
 Gender: M  
 Date of Birth: 22 Feb 1907  
 Mobile: 0400 123456

The above member appears to match an adult application that we are currently processing. You have an alert recorded against this member that we would like to know more about. Can you please contact me at your earliest convenience?

## Enquiry email address

An Alert Enquiry Email is to be added to the Branch record. All alert Enquiries will be sent to this address.

## Security and permissions

It is assumed that anyone who can see alerts should also be able to view normal Branch members and formations in the system. On this basis the permissions can be kept fairly simple...

The existing Admin Users Table is to have a boolean field added:

**AlertsAccess**

Checking this box will grant the user the additional privilege of access to the Alerts sub system for adding and searching.

## Branch Integration API

For the National Alert system to succeed it must be used.

### Checking for an Alert

For seamless integration with Branch administration procedures, an API will automate searching. Branch Membership Systems will be able to invoke that API on their adult application data entry screens. The membership system screen will call the API passing the name, data of birth etc and the API will return one of two messages:

**No Alert Found**

Or

**Possible matching Alert found, [click here to view](#)**

There are several ways that this function can be incorporated by Branches but the result will be that every new adult applicant is scanned against the National records.

### Adding an Alert

It is felt that adding an alert will not be an everyday event so it will not be onerous for these to be added directly to members.scouts.com.au rather than via an API.

It is also suspected that the three membership systems differ in how they record Alerts and supporting data (if at all). That said, if there is interest, explorative discussions could lead to an API to create an alert record.

### Use of the API is optional

Branches will not be forced to integrate the API into their membership system. The system can be used as a stand alone tool for as long as desired. The API is simply a time saving device with the added benefit of ensuring that searches are done every time.

It is expected that all branches will ultimately incorporate the API but there will be no forced time table.