

CAREMONKEY GUIDE FOR ADMINISTRATORS

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Approved by the CareMonkey Working Group



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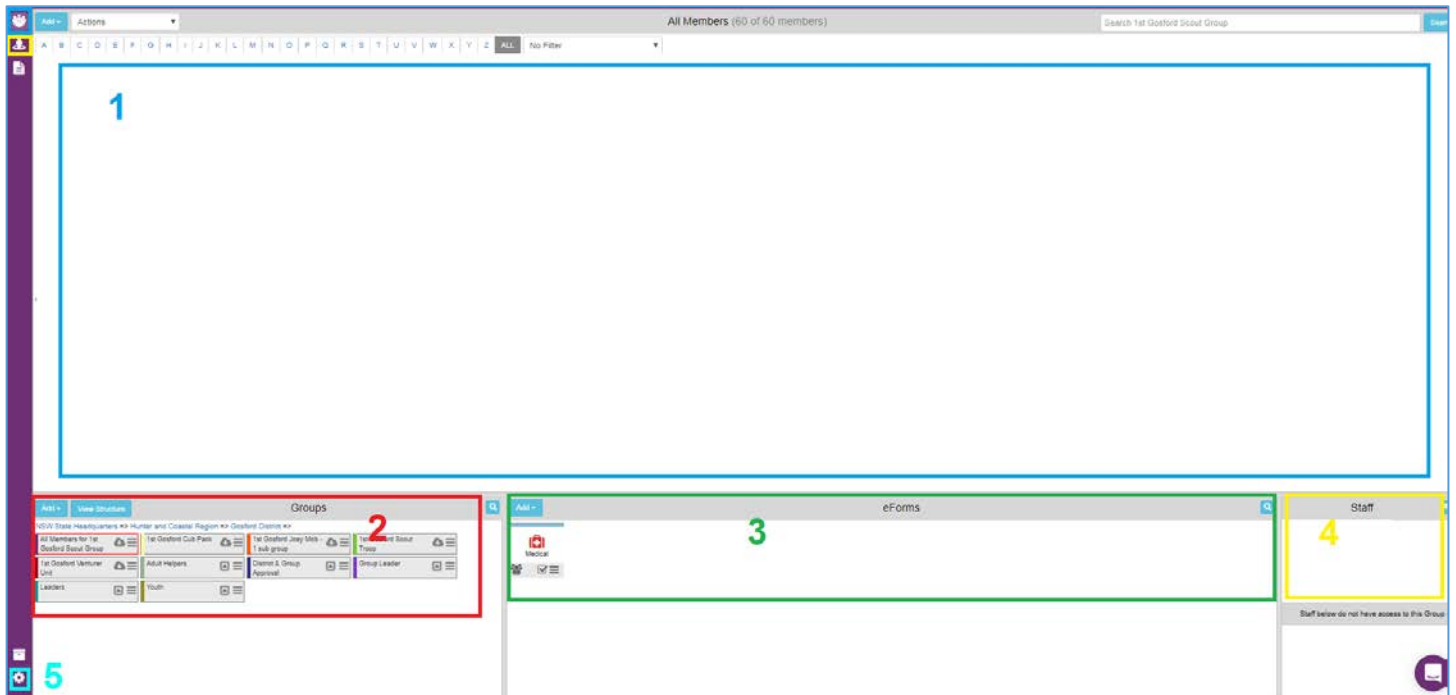
OVERVIEW

- [Purpose](#) – CareMonkey is the electronic system used by Scouts NSW for enabling parents/Carers/individuals to share member health records, permission forms and contact details and will replace over time the old E1 Activity Notification Form Part I & II paper forms.
- [About CareMonkey](#) – CareMonkey is an Australian company headquartered in Melbourne. The system is widely used throughout Australia with a customer base including hundreds of schools, sporting clubs, community groups and businesses. It is also expanding its operations into the UK and USA.
- [Security and privacy](#) – all CareMonkey data for Scouts is stored in Australia. CareMonkey uses sophisticated security measures to protect data. Information about this, along with their Privacy Policy, is available on their website. CareMonkey is subject to the provisions of the Privacy Act and the Australian Privacy Principles.


CAREMONKEY TERMINOLOGY

- **Administrator:** The person(s) responsible for the overall CareMonkey Management for the Group. These are automatically assigned based on the following Appointments:
 - Group Level: Group Leader, Group Leader-P, LIC, CL (Appointed), or CL (Appointed) -P
 - District Level: District Commissioner
 - Region Level: Region Commissioner and Region Office Manager
- **Staff:** Section Leaders, indicated by the  icon. The initial setup will be done as part of the activation, but it will be up to the Administrator to maintain it. There can be more than one Staff Member per Section. They can only view the profiles belonging to the specific subgroup they are assigned to. They are also referred to as Staff Carers, or Carers.
- **Subgroup:** CareMonkey equivalent of Section.
- **Independent Organisation:** CareMonkey equivalent of Formation
- **Members:** All Youth and Adult Members belonging to that Independent Organisation. Indicated by the  icon.
- **Settings Menu:** Indicated by the  icon in the bottom left corner of the screen. This is where you will find your organisation settings, eforms, and messaging options.
- **Reports / Archives:** Indicated by the  icon. From here, you can access reports related to your Group.
 - **Menu:** You can access a variety of menu items by clicking on the  symbol.
 - **Integration:**  shows the record / formation is synced with ScoutLink

SCREEN OVERVIEW



1. Members

All Members attached to the Group / Section / eForm you select will appear in this screen. It is listed alphabetically according to Family Name. Simply click anywhere (except the menu symbol) on the group / Section or Eform box to see the Members attached to it. You can quickly access everyone by clicking on the  icon in the top-left corner.


2. Groups

This is where you are able to access the hierarchy of your Group / District. Click on the Parent Group to access the formations below it. You can also add your own Subgroups, for example a Group for all your Adult Helpers.

3. Forms

All Forms are visible here. This is also where you access the template to create your own eForm – Click on Add -> Start from Template -> and proceed as per the instructions.

4. Staff

This is where you see who is assigned to which eform or Group. There are two sections – above and below the line. Above the line are the people specifically assigned to that item you are viewing; below the line shows you the name of the available Staff Carers in your Group. You can easily reassign Staff Carers by clicking on their names from within this part of the screen, and then setting the tickbox in the corresponding section / form you would like them assigned to. You can access all your staff Carers by clicking on the  icon.


5. Settings

You can access all your Group settings through this icon.

SCOUTS NSW AND CAREMONKEY

- [Organisational structure](#) – the organisational structure of Scouts NSW is reflected in CareMonkey (i.e. with a vertical hierarchy consisting of Branch, Regions, Districts, Groups and Sections). At this stage, CareMonkey has not been configured to reflect internal groupings that cut across the organisation such as adventurous activity teams or District/Region Sectional groupings such as District Cubs etc.
- [Data integration](#) – CareMonkey and ScoutLink have two sync schedules, at which time CareMonkey is updated with any key changes from ScoutLink:
 - New or resigning members in ScoutLink will have their profile requests created or archived in CareMonkey accordingly. This is an **immediate** process and a Member added/ resigned will be immediately reflected at Group level in CareMonkey.
 - Every night, CareMonkey will also update with any changes to a member's appointment such as movement between Sections (e.g. Joeys to Cubs). During this **nightly** process, all new Members are slotted into their appropriate sections.


*Please note: Once a profile request has been created in CareMonkey then any subsequent changes to that person's contact details in ScoutLink will **not** flow through to CareMonkey.

- [Core data](#) – new profile requests in CareMonkey are generated by the creation of a new member record in ScoutLink. Similarly, all core Sections in CareMonkey (such as Cub, Scout, Venturer, Adult etc) which are populated through the nightly integration and are marked with a  symbol in their icon, cannot be changed manually.
- [Minimum data requirements](#) – The CareMonkey-ScoutLink sync are subject to the following minimum data requirements:
 - For Youth Members, the 'Parents' Tab in ScoutLink need to contain at least one parent / Carer, who has an email address.
 - For Leaders (and Rovers >18), an email address in Member Summary is required.
- [Levels of user](#) – there are 3 levels of user in CareMonkey:
 - The **Administrator** for each Region, District and Group. This is the Region Commissioner, District Commissioner, or Group Leader for that formation and this role has the ability to create [sub-groups](#) and [Staff](#), enable (approve) [eForms](#) and change [organisational settings](#) for the formation.
 - **Staff**. This level is able to view the profiles of all members within a section, formation or eForm for which they have been given Staff access and to create but not enable an eForm. For instance, an Administrator could add a Cub

Leader as a Staff Member for the Group's Cub Pack thus allowing the Cub Leader to view the care profiles of all Cubs in that Pack.

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

PROFILES

- [Account versus profile](#) – each CareMonkey profile owner is required to create a CareMonkey account. Under this account are stored any profiles they own, such as their own profile and the profiles of their children. CareMonkey strongly recommends that each adult creates their own unique account and that adult members do not share an account. In the case of separated families a profile owner can elect to share a child's profile between two accounts with each account having either “read only” or “read and edit” access to the profile.
- [Latest information](#) – CareMonkey records are maintained and updated by the profile owners so profiles will contain up-to-date health records and contact details. Profile owners are periodically reminded by CareMonkey to update their profiles.
- [Meaning of profile colours](#) – when an Administrator views the profiles in their formation they will see them as either gray, blue, red, green or black. These colours have the following meanings:
 - **Blue** means the profile has been successfully completed and shared with Scouts.
 - **Red** means the profile has not been completed and shared with Scouts, or that there is a problem with the email address. By clicking on the menu symbol (the three little horizontal lines ) of a profile an Administrator will be taken to the Profile Request screen where they can see the current completion status of a profile in the bottom left corner of the screen.

In the case of an email problem, the Administrator needs to ascertain the correct email address for the profile owner then click on the [menu symbol](#) for the profile, then click on “Edit profile request” and enter the correct email address into the “Override the integrated email above” field then click “Save”.
 - **Gray** means the medical profile has not been received.
 - **Black** means the profile is being managed locally because the member refuses to use CareMonkey. No emails will be sent and no health information collected. This can be set or unset by clicking “Edit profile request” for the profile then ticking or unticking the “Manage this profile locally” box.
- [Profile completion requests](#) – after a new member is created in ScoutLink a CareMonkey profile request will be generated for them and will be emailed to the profile owner (as identified in the member's Scoutlink record – the Parents tab for



Members <18, or email 1 field for Members >18) asking them to complete the member's profile and share it with Scouts. If this is not done within a set time then CareMonkey will send periodic email reminders to the profile owner until the profile is completed and shared.

- [Profile sharing](#) – at all times a CareMonkey profile remains the property of the profile owner. The profile owner may specifically elect to share that profile with organisations such as Scouts or a school. When a profile is shared with Scouts, we are only granted access to view it and are unable to change any aspect of the profile. A profile owner only completes one profile per member but can share this single profile with as many organisations as they wish. A profile will only be shared if the profile owner clicks the “Share” button that is specifically linked to a share request from the relevant Scouting formation. A share request will only appear in a profile if the profile has been fully completed and the name and email address in the profile exactly match the name and email address in the share request from Scouts NSW. A profile owner should not try to manually share a profile with a formation or Leader other than by the process outlined above.
- [Accuracy of data](#) – because CareMonkey uses a name and email address to uniquely identify each person it is vital these are accurate. If a CareMonkey profile has been created for “Bill Smith” and Scouts is requesting a profile for “Billy Smith” or “William Smith” then CareMonkey will not link the profile request with the profile. Similarly, the email address in the profile request must exactly match the email address used by the profile owner to login to the profile otherwise the profile cannot be shared.
- [Changes to a profile request](#) – prior to the completion of a profile by the profile owner, an Administrator may change the email address to which the profile request is being sent (through the “Override the integrated email above” field as outlined above) or may archive/delete the profile request.

If a profile request is archived or deleted but the member is still active in ScoutLink, please contact the CareMonkey team at Scouts NSW State Office, as they will be able to assist you in disabling the particular Members' sync. If you do not and the member is still active in ScoutLink, then a new profile request will be generated following the next nightly sync between CareMonkey and ScoutLink.

If a profile request has been generated with an incorrect name then the member's name should be corrected in ScoutLink, please contact the State Office CareMonkey team to assist you with generating a profile request with the correct name. A new profile request with the correct name will then be generated in the next sync.

- [Changes to a completed profile](#) – once a profile has been completed then only the profile owner can change the details within that profile. Updates to the primary email address and mobile number of the profile owner will be updated in ScoutLink.
- [Private notes](#) – Administrators and Staff can record private notes about a profile that are not visible to the profile owner. This is done by clicking on the [menu symbol](#) for the profile and then selecting “Private notes”.

- [Viewing profiles](#) – In addition to viewing profiles online on a computer, Administrators and Staff can also view profiles online or offline by downloading and using the mobile app on a phone or tablet. When signing in via the mobile app with network or internet coverage all current profiles will be automatically downloaded. The downloaded profiles will then be available next time the mobile app is accessed, whether network and internet coverage is available or not, by tapping the “View offline data” button. Members can also print a hardcopy of their CareMonkey record if attending an event where the Carer will not have electronic access to their profile. Hardcopy printouts should be securely destroyed following the event
- [Multiple profile requests](#) – any additional appointments that are recorded in ScoutLink will also appear in CareMonkey and each formation that a member belongs to will be able to see the member’s profile, providing the profile owner has specifically elected to share the profile with that formation. For example, a Youth Helper’s CareMonkey profile will be visible to both the Formation of their Youth Appointment AND the formation of their Youth Helper Appointment. These Members will receive multiple profile requests but will only have to create a single profile and share that with each Group.
- [Add a second parent / carer to a profile](#)

The owner of the original email address can set up the profile and share it with the Organisation. Then, in the profile, there is a ‘share’ button. Click on that and it will open with a dropdown menu – enter the name, email, relationship, and make sure the Access type is set to ‘View and Modify’. Save it, and then both parents have the necessary access to view and modify (which includes ability to respond to eforms).

You can find step-by-step instructions here: <http://support.caremonkey.com/sharing-and-privacy/help-for-users/how-does-a-user-share-a-profile-with-a-second-parent-or-carer>

This is very useful feature for families with shared care arrangements, or who require both parents to have access to the CareMonkey profile.

ADMINISTRATORS

The Administrator for a formation is initially the person who is recorded in ScoutLink as the Group Leader of the formation.

- [Login options](#) – after logging in to CareMonkey an Administrator will be presented with two or more options for accessing the system. After accessing any of these options an Administrator can also change between options by clicking on the dropdown menu in the top left corner. The options are as follows:
 - **Care Central** is used to access their own CareMonkey profile. If they are a profile owner for their own children then those profiles would also be accessed through this option. Staff Carers will manage their Groups and Forms from within the Care Central view.
 - **Administrator for {formation name}** is used to administer CareMonkey for any formation for which they are GL. There may be multiple Administrator options if they have more than one GL role.
- [Initial checklist](#) – some key elements of CareMonkey which a Group Administrator should check as an initial priority are as follows:
 - Compare ScoutLink Membership with the profiles listed in CareMonkey. If there are youth members who do not have a profile in CareMonkey it will most likely be due to them not having a nominated Primary Carer in ScoutLink's Parents tab and/or the Primary Carer not having an email address in ScoutLink's Parents tab.

Missing adult members in CareMonkey will most likely be due to them not having an email address recorded in ScoutLink.
 - Check for any red profiles in CareMonkey. This means their recorded email address is invalid and the member's family are not receiving emails from CareMonkey. Ascertain the correct email address and update the CareMonkey profile request via the "Override integrated email above" box.
 - Make sure that you have Staff assigned to each Section. You will be able to see the Staff allocation in the bottom right-hand corner of CareMonkey – if this is blank, you have yet to complete. You can find more details on how to do this on page 11.
 - Click on "Settings" and check that the three items in the Messaging menu both start with "Disable ...". If either of these options has a red background and starts with "Enable ..." then click on that option then click "OK" so that it changes to "Disable ...". If these options have a red background it means that profile request emails are not being sent to members or Carers.

- [Organisation Administrator](#) – an Administrator can add or delete additional Administrators for their formation by clicking on “Settings” then “Administrators” in the “Organisation Settings” menu. Due to privacy issues, other Administrators should only be appointed where it is reasonable that the person has access to all profiles for the Group.

When an Administrator leaves the organisation, the new Administrator or a higher level Administrator must manually delete them as an Administrator for that formation. To delete an Administrator click on “Settings” then “Administrators”, then click the red circle with a cross next to their name.

- [Organisation Settings](#) – there are a number of system settings in CareMonkey which the Administrator can change by clicking on “Settings” then “Organisation Settings”:
 - Contact details for the Group – the Administrator should change the “Administrator name”, “Administrator title” and “Administrator email” fields to reflect their own details. Any local emails to Group members will then appear to come from them and replies will also go to them. If this is not done then any local emails will appear to come from the hierarchy head.
 - Frequency reminder emails – this field is used to control the frequency of reminder emails to Group members. “7 days” is the default option.
 - Allow Staff to create eForms – by clicking this box Staff will be able to create an eForm and attach members to it, although the eForm will still need final approval (enabling) by the Administrator.
- [Sub-groups](#) – an Administrator can create sub-groups within their formation for any number of purposes. For example, they may wish to create a sub-group for a particular sub-set of adults such as “Adult Helpers” or “Committee members”. To create a sub-group click on the “Add” button in the Groups section in the bottom left corner of the screen. To move someone into a sub-group, drag-and-drop their profile onto the sub-group. To move multiple people, click on the selected profiles to highlight them all then drag-and-drop any one of the highlighted profiles onto the sub-group, the others will all be moved as well. Sub-groups created by the Administrator will not be affected by the nightly data integration with ScoutLink.
- [Staff](#) – as part of the setup, all your Appointed Leaders – Section Leaders and Assistant Section Leaders – will be added to the appropriate section. From here on, it is your responsibility to add and/or remove “Staff” as they are appointed / removed.

Your Staff Carers are an important part of your process. If they are set up, you can easily link them to a form for an Activity they are responsible for. If they are linked to a form, they will be able to see the profiles for the Members attending the Activity. It will also enable them to download profiles for those Activities that occur outside of normal mobile phone range.

To add a Carer click on the “Add” button in the Staff section in the top left corner of the screen. Then select “Add single staff request” and enter the name and email address of the person to be added as a Staff member, ensuring that the spelling of both exactly matches the spelling they use in their own profile. Then click on “Save and send invitation”. Once the Staff profile is created, either drag-and-drop the Staff profile onto the Section (e.g. Cub) or eForm that the person is to be given Staff access to or else tick the relevant box(es) in the Staff profile for the Section (if visible) or eForm that they are to be given access to.

Administrators should also add themselves as a Staff Member for the Group (tick the box for the whole formation) otherwise they will not be able to see member profiles on their mobile app.

When a Staff Member leaves the organisation, the Administrator must delete them as a Staff Member for that formation. This is done by going to the Staff Section, and then clicking on the [menu symbol](#) in their Staff profile then clicking on “Archive and Delete this staff member”. You will be asked to enter your password to confirm that this is what you want done.

- [Audit trail](#) – an Administrator can view the contents of all emails and SMSs sent to a member by clicking on the [menu symbol](#) on the member’s profile then selecting “View audit trail”.
- [Reports](#) – an Administrator can view a variety of reports for their formation by clicking on “Tools” and then “Reports menu”.

STAFF

- [Role of Staff](#) – Staff are those people who by the nature of their role have responsibility for the care of others and have a legitimate need to access the CareMonkey profiles of those in their care. For example, a Cub Scout Leader could be a Staff Carer for their Cub pack, or a first aider on a camp could be a Staff Carer for the participants of that camp. Within CareMonkey, we can assign and remove Staff access as and when required. A person can be assigned as a Staff Member for a Group, Section or event (eForm). For privacy purposes, Staff Carers should only have access to CareMonkey profiles when it is a legitimate requirement of their role and their access should be withdrawn during any other periods or if they leave the organisation.

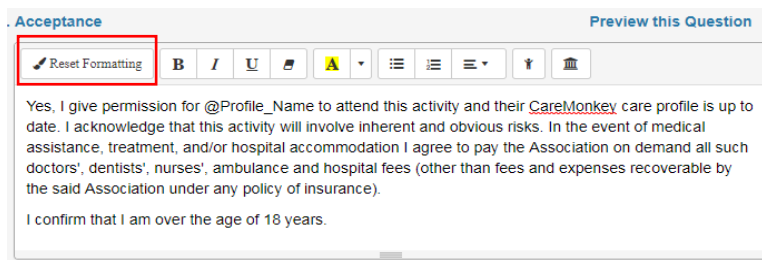
eFORMS

- [Purpose of eForms](#) – eForms within CareMonkey are typically used as electronic permission forms and communication tools for events and activities. They can also be used as a general acknowledgement form where the formation or organisation requires members to acknowledge or consent to certain provisions.
- [Creating an eForm](#) – either an Administrator or Staff Carer (if the Administrator has ticked the “Allow ...” box in the “Settings” menu) can create an eForm, however only an Administrator can enable it. To create an eForm click on the “Add” button in the eForms section at the bottom of your screen then select whether you wish to start from an existing eForm, an eForm template or to start from scratch.
- For [Event eForms](#), please use the “Scouts NSW Activity Template” with the latest date. Complete the fields in the template as per the instructions below. Please do not remove any of the questions, but add additional questions if necessary.
- [Completing the eForm](#) – complete the “Description & Questions” tab as follows:
 - Title – enter a descriptive name for the eForm e.g. *Cub Camp 2 Dec 2017*.
 - Type – select the “Event” option for any eForm that relates to a specific event or activity. “Custom Forms” would usually be used as acknowledgement, consent or information forms in other circumstances.
 - Requires up-to-date Care Profile – Yes. This makes it mandatory for a parent / profile owner to confirm that the care profile is up to date when they sign acceptance. You will see the Acceptance statement is lengthy – please leave this unchanged. The @profilename inserts the member’s name into the eform, making it more personalized.
 - Description – enter a description of the activity. This will provide parents with information about the planned activity i.e. where, who, when, why, what etc. Click in the description and enter the information against the headings provided.

This will be included in the email that is sent out, so an outline of the activity will allow parents to know upfront what they are signing into CareMonkey to see.

- General Notes – Enter the details of the activity – route, itinerary, packing list, maps, gear, and all the details that parents need to know. This used to be included in the “Additional Details” box on p2 of the E1 Activity notification Form Part I & II.
- Questions – you can include a variety of different questions in the eForm such as multiple choice (e.g. “Which activities would your child like to participate in from the following list ?”), single choice, yes/no, volunteer questions (e.g. please indicate if you can assist with providing transport to this event) or questions in other formats.

- Additional tools – you can also attach other documents such as information sheets for a park being visited or an externally run activity.
- [eForm settings](#) – by selecting the “Settings” tab within an eForm you can enter the start and end dates of the event, the cut-off date for responses and the frequency with which reminder emails are sent. You can also enable the eForm. Once an eForm is enabled, it will immediately send emails to all profiles attached to it so ensure that the eForm is fully completed before enabling it. It is wise to preview the eForm and send a test email to yourself (via the following two tabs) before enabling the eForm. Any profiles that are subsequently attached to an enabled eForm will be sent an email as soon as they are attached to it. In the Settings tab, you can also tick the box to “Add eForm replies to the care profile” which provides another option for viewing the responses of event participants.
- [Signatures & Acceptance](#) – When creating an eForm, be sure to reset the formatting on the acceptance to send the full declaration used to be covered by Scouts insurance in line with the E1 form.



Acceptance Preview this Question

Reset Formatting **B** *I* U

Yes, I give permission for @Profile_Name to attend this activity and their CareMonkey care profile is up to date. I acknowledge that this activity will involve inherent and obvious risks. In the event of medical assistance, treatment, and/or hospital accommodation I agree to pay the Association on demand all such doctors', dentists', nurses', ambulance and hospital fees (other than fees and expenses recoverable by the said Association under any policy of insurance).

I confirm that I am over the age of 18 years.

- [Attaching profiles](#) – an Administrator will have access to all of the formation’s eForms in the eForms section at the bottom of the formation’s home page. To attach profiles to an eForm either drag-and-drop entire Groups or sub-groups (such as “Cub”) onto the eForm or click on individual profiles to highlight them and then drag-and-drop any one of those profiles onto the eForm to attach all highlighted members.
- Carers and Administrators can also attach profiles to an eForm by clicking on “My eForms” in Care Central then “Assign profiles” in the relevant eForm. Click either the Section name if the entire Section is to be added to the eForm or else assign individual profiles to the eForm by clicking on them in the "Profiles Out" column, which will then move them to the "Profiles In" column.
- [Attaching Carers](#) – To attach a Carer to the eForm, first add the Carer if they’re not already a Carer within the Group then either click on the [menu symbol](#) on their Carer icon and tick the relevant eForm under “Staff Carer for the following eForms” or else drag-and-drop their Carer icon onto the eForm. Staff Carers for eForms will be able to view all profiles of Members attached to that eForm.
- [Viewing participant responses](#) – by clicking anywhere on an eForm (other than the [menu symbol](#)) the profiles for the participants and their response status will be displayed. A green circle with a tick means they have accepted, a yellow circle with a question mark indicates no response yet and a red circle with a cross indicates they

have declined the invitation to attend. By clicking on the [menu symbol](#) of a participant's profile you can view their individual response to the eForm.

- [eForm reports](#) – for reports and other useful information about an eForm, click on the [menu symbol](#) for the eForm and the menu on the left of the screen will provide a variety of options. This includes timelines (a history of when each participant received the emails and responded), a summary of responses, any completed roll-call reports and options to send emails and SMS's to participants (for instance if the return bus is running late). Carers can also access reports and information on the eForm through the "My eForms" menu when they log in. This includes access to a roll-call report, which can be used to electronically record the presence of participants at any given times during the event.
- [Archiving eForms](#). Once the Activity has run, The Administrator should archive the eForm. This is to ensure the privacy of the profiles, and to ensure that the profiles attached to that eForm will not be available on mobile devices. The Administrator can archive the eForm by clicking on the Menu Item and selecting "Archive eForm" from the "Manage eForm" menu item. You will be asked to provide your password to confirm. Once an eForm is archived, it can only be accessed by the Administrator.
- [Changing a response to an eForm:](#) Before an eForm deadline, you can log into Care Central and, from the eForms linked to your Profile, click on the "Change Response" button. You can now change and submit your new response.


If the eform response deadline has passed, the Administrator can reset the response. Click on the form to see the profiles attached to it, and then select the Member who needs to have their response changed and click on the menu icon. From here, you will be able to see the eforms attached to that Member. Scroll down to the appropriate eform and select "Reset Response". The image below shows a Member who has not responded to an eform yet. If the member has responded, the "Reset Response" button will replace the outlined "Send Reminder" button.

Details for Carol Leader4

- View/Edit member
- Archive this Member
- View Member/Profile
- View Audit Trail
- View Member Changes
- View Changes
- Injury Reports
- Private Notes
- Add manual tag
- Remove manual tag
- Upload Action Plan

- Viewed Profiles
- Mobile App Signins
- View old Member at ▾

This member belongs to the independent group named: **1st Moon Scout Group**
Carol Leader4



Profile last updated: 06 November 2017 09:34:19 by Carol Leader4

Profile Owner Contacts:
Acoustic Neuroma

Integration ID:
Manual Tags set: *none* [add](#) / [remove](#)


Add this member to the following [member](#) groups

Check all
 Hornsby Gang Show

Add this member to the following eForms

eForm Name	Status	Actions
<input type="checkbox"/> Check all		
<input checked="" type="checkbox"/> Melbourne Cup Afternoon Activity	No response yet	Send Reminder
<input type="checkbox"/> This is a test Form		

Care Profile Owner



Carol Leader4
Mother
3431432432432

[Send Email Message](#)

You can select “Update Member” to notify the Member via email that the response has been changed.

GENERAL

- [Communication tools](#) – some Groups are increasingly using CareMonkey as a communication tool for emailing or SMS-ing members with updates to events or activities. Each active Group received an initial SMS credit in CareMonkey with the option to purchase, at the Group’s expense, further credits directly from CareMonkey by clicking on “Tools” then “SMS Menu”.
- [Privacy obligations](#) – it is imperative that all CareMonkey users understand that CareMonkey records are private and confidential. Administrator or Staff Carer access should only be granted to registered members of Scouts and only where there is a demonstrable and legitimate need to do so. CareMonkey has an audit feature, which tracks and records the details every time a profile is accessed.

ACTIVATION – WHAT CAN I EXPECT?

1. When your Group is activated for CareMonkey, your Group Members will be synced across to CareMonkey immediately.
2. You will receive an invitation to become an administrator for your group. Click on the link in the email, and follow the on-screen prompts to receive access.
3. Although all your Section Names will appear in your Group Menu, until the first overnight sync runs, all your Members will appear at the Group level only.
4. Once the sync runs, all your Members also appear in their Appropriate Sections.
5. Even though you are the administrator, you will also receive an invitation to create a medical profile and share this with your Group, as this invitation will be sent to all Members. You can now be invited to Activities and respond electronically.
6. Make sure you are set up as a Staff Carer for the Group. This will enable you to manage Events from the mobile App, if you are set up only as administrator you will not be able to access any of your Group’s information on your mobile. Administrator setup is only available on PCs.

WHAT DO I DO NEXT?

1. Make sure your “Staff” setup is correct

Your appointed Leaders – Section Leaders and Assistant Leaders – will be set up as “Staff”. This will enable them to see the Profiles attached to their section. They will also be able to start creating eforms (if you have enabled this setting).

If you have someone missing, please follow the instructions in this article: <http://support.caremonkey.com/caremonkey-account/help-for-administrators/how-does-an-administrator-add-a-single-staff-carer>

Make sure you assign them to the appropriate section. More information can be found at <http://support.caremonkey.com/groups/help-for-administrators/how-does-an-administrator-assign-staff-carers-to-a-group-or-an-eform>.

When a Staff Carer resigns or is transferred, please remove them from your group. Instructions can be found at <http://support.caremonkey.com/caremonkey-account/help-for-administrators/how-does-an-administrator-delete-a-staff-carer>.


2. Check your Organisational “Settings” menu – and save the changes

In your “Settings” menu, go to the ‘Email Notification Settings’. Form here, you can set the reminder frequencies of profile creation emails – it is currently set to 7 days.

Change the Email Signature setup to your own contact details – both the top two drop-down boxes. This will ensure that the email seems to come from you, and all replies will come to you.

3. Activate your Group

Make sure your Group is activated. Follow the following steps:

1. Go into your Settings Menu
2. In the ‘Messaging’ menu item, click on ‘Enabling messaging for members eForms’. Click ‘OK’. Save.
3. Back in your [Home Screen](#), click on the Horizontal Stripes of the Medical eForm 
4. At the top, the eform setting should be All Members (Smart eForm). Leave the details of the form unchanged. SAVE.

Once you are ready to start using eForms for Activities, you will have to enable your Staff Carers to create eForms. Go into your Organisation’s Setting menu, and set the appropriate tickbox (image on next page). Save.

Your Staff Carers will now be able to create eForms. Please use the template provided. See the [section on eForms](#) for more information on how to create and enable eForms.

View Settings > Settings > View Membership Changes

SMS
Manage SMS

EFORMS
Setup Payments
Member eForm Templates
Staff eForm Templates
Categories

MESSAGING
 Enable messaging for Members eForms
 Enable messaging for Staff eForms
 Enable messaging for Staff assignments

INTEGRATIONS/API
API
Integrations

The External display name is used for external communications

Website URL address

Administrator name*

Administrator title

Administrator email*

Mailing address

Country*

State*

Currency*

Timezone*

Allow staff to send SMS messages
 Allow staff to create eForms
 Disable roll calls
 Allow staff to use injury report?

Consider adding an additional administrator(s)

Since the Administrator is the only one that can enable eforms for distribution, they run the risk of becoming a bottleneck in the process. You know your Group best.

FURTHER INFORMATION

- Clicking on “Help” then “FAQ’s” when logged in to CareMonkey.
- Visiting the CareMonkey website www.caremonkey.com and viewing their demonstration videos by clicking on the “Learn” menu then “Demonstrations”.
- For technical problems, using Live Chat when logged into CareMonkey, emailing CareMonkey via support@caremonkey.com or calling the CareMonkey helpline on 03 8658 1424.
- For Scouts-specific CareMonkey issues, emailing the CareMonkey Administrator at caremonkeysupport@nsw.scouts.com.au, or call us on 02 9735 9000.