

Overview

With the Self-Reporting enhancement, adult members online can specify which positions they currently hold or will hold for a membership year. Using this feature, members can self-report multiple positions in different troops, Service Units or Areas. Members can self-report their positions on their Membership Profile when registering, or from the My Account page any time of the year.

Self-Reporting during Member Registration

Note: All positions are pending, subject to Council approval.

Position:

Year: 2011

Troop/SU/Area: [Search](#)

Position	Year	Troop/SU/Area
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Self-Reporting from My Account

My Positions

Position:

Year:

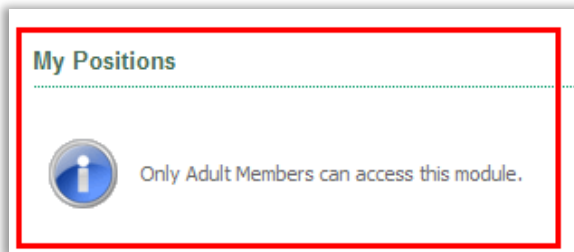
Troop/SU/Area: [Search](#)

Year	Troop/SU/Area	Position
2010	Troop10089	14 - Member (No Assigned Position)

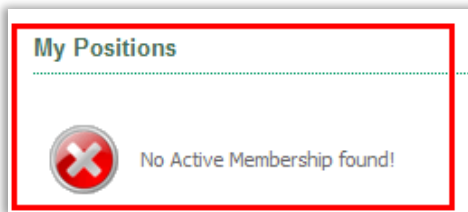
To view a list of position codes that volunteers see online, consult the [ebiz Position Codes](#) spreadsheet on the CES Support site. This spreadsheet reflects all of the positions available online. The screenshots in this document reflect an incomplete list of position codes.

Of all the customers who use your portal, only **adult members** are able to self-report positions online. Girls and adult non-members do not have access to this module and see the following messages on their My Account pages:

Message girls see online:

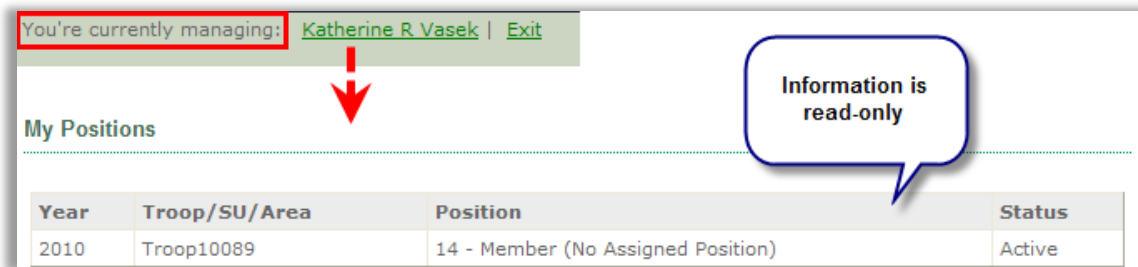


Message adult non-members see online:



Self-reporting is available during member registration for both new and reregistering adult members. You cannot restrict new adults from self-reporting positions online while allowing returning members to do so. Leaders can assign positions to members during troop registration, but cannot make mid-year position code changes for members while managing their records in Troop Management.

Leaders cannot make mid-year position code changes for troop members, but can add positions during registration



All positions reported online are given a Participation Status of "Pending" in Personify, indicating that the member has yet to be approved for the position. Once the member has been approved for the position, the council must update the Status to "Active" in the back-office. If the member is not approved for the position, the Status should be changed to "Not Approved". Members can view the statuses of all their positions online from My Account.

My Positions

Position:

Year:

Troop/SU/Area: [Search](#)

Year	Troop/SU/Area	Position	Status	
2010	AREA001	Troop Treasurer	Not Approved	
2010	Troop10089	03 - Troop Committee Member	Active	
2010	Troop16059	02 - Assistant Leader/Advisor	Active	
2010	Troop16059	14 - Member (No Assigned Position)	Active	
2011	AREA001	Troop Treasurer	Active	
2011	Troop16058	01 - Leader/Advisor	Active	
2011	Troop16059	02 - Assistant Leader/Advisor	Pending	Delete
2011	Troop16059	14 - Member (No Assigned Position)	Active	

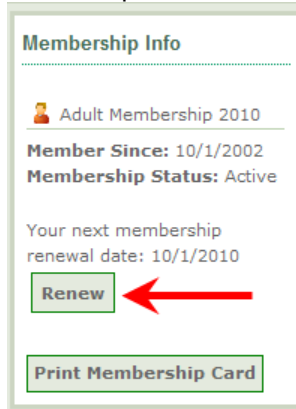
**"Pending"
positions must be
reconciled in the
back-office**

In the text that follows, we will describe in detail how self-reporting activities are carried out online and in the back-office. We will also demonstrate the tools available to councils to help reconcile "Pending" positions.

Self-Reporting Online During Member Registration

As we stated above, members can self-report positions during registration. Below we will demonstrate how Jerianne Greene can renew her registration for 2011, self-reporting herself as an "01" of a troop and "Trainer" of a service unit in the process.

1. Jerianne logs onto the site, and clicks the option to **Renew** her registration from My Account.



Membership Info

Adult Membership 2010

Member Since: 10/1/2002
Membership Status: Active

Your next membership renewal date: 10/1/2010

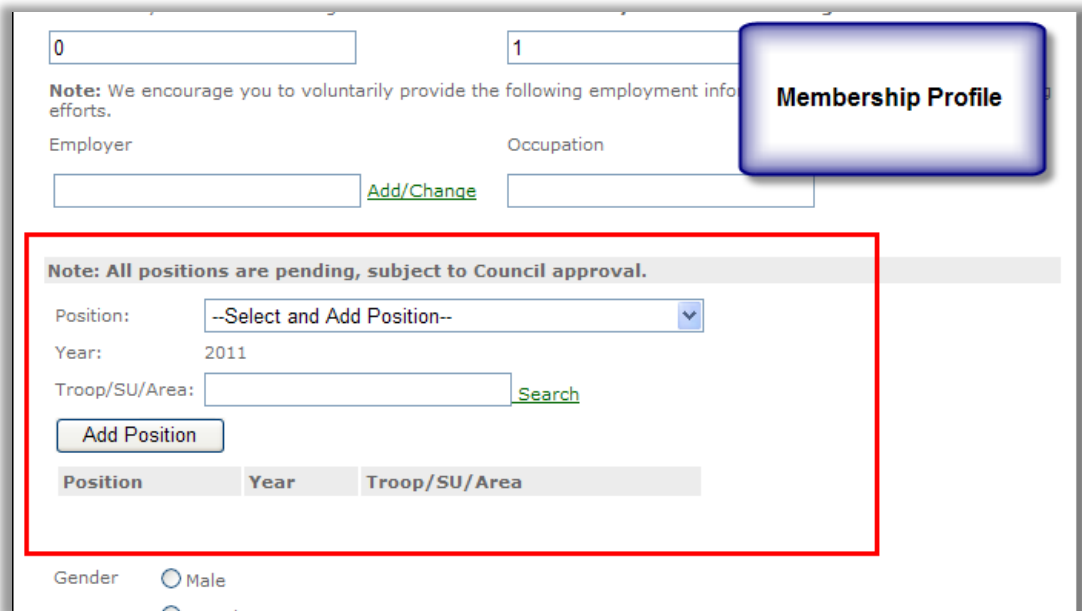
Renew ←

Print Membership Card

2. She then clicks **Add** to complete her Membership Profile. The area for self-reporting is located in the bottom half of the Membership Profile.

Jerianne Green - 000008418590

	Order Number	Date	Membership	Amount	Additional Information *
<input checked="" type="checkbox"/>	1042210922	Apr 05, 2010	Adult Membership 2011 10/01/2010 to 09/30/2011	\$ 12.00	*Add* ←



Membership Profile

Note: We encourage you to voluntarily provide the following employment information for your efforts.

Employer: [Add/Change](#) Occupation:

Note: All positions are pending, subject to Council approval.


Position:
Year: 2011
Troop/SU/Area: [Search](#)

Position	Year	Troop/SU/Area
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
Gender: Male

3. From here she clicks the **Position** drop-down and selects the position of "01- Leader/Advisor".

Note: All positions are pending, subject to Council approval.

Position: --Select and Add Position-- 

Year: --Select and Add Position--

Troop/SU/Area: 


Position

Gender Male Female

- 01 - Leader/Advisor
- 02 - Assistant Leader/Advisor
- 03 - Troop Committee Member
- 09 - USA Girl Scouts Overseas Committee Member
- 10 - USA Girl Scouts Overseas Committee Chair
- 12 - Trainer
- 13 - Special Service Adult
- Camp Staff
- Secretary
- SU Delegate
- Troop Treasurer

4. She then clicks the **Troop/SU/Area** box to search for her troop.

Note: All positions are pending, subject to Council approval.

Position: 01 - Leader/Advisor 

Year: 2011

Troop/SU/Area: [Search](#)

Click inside the field or click "Search"

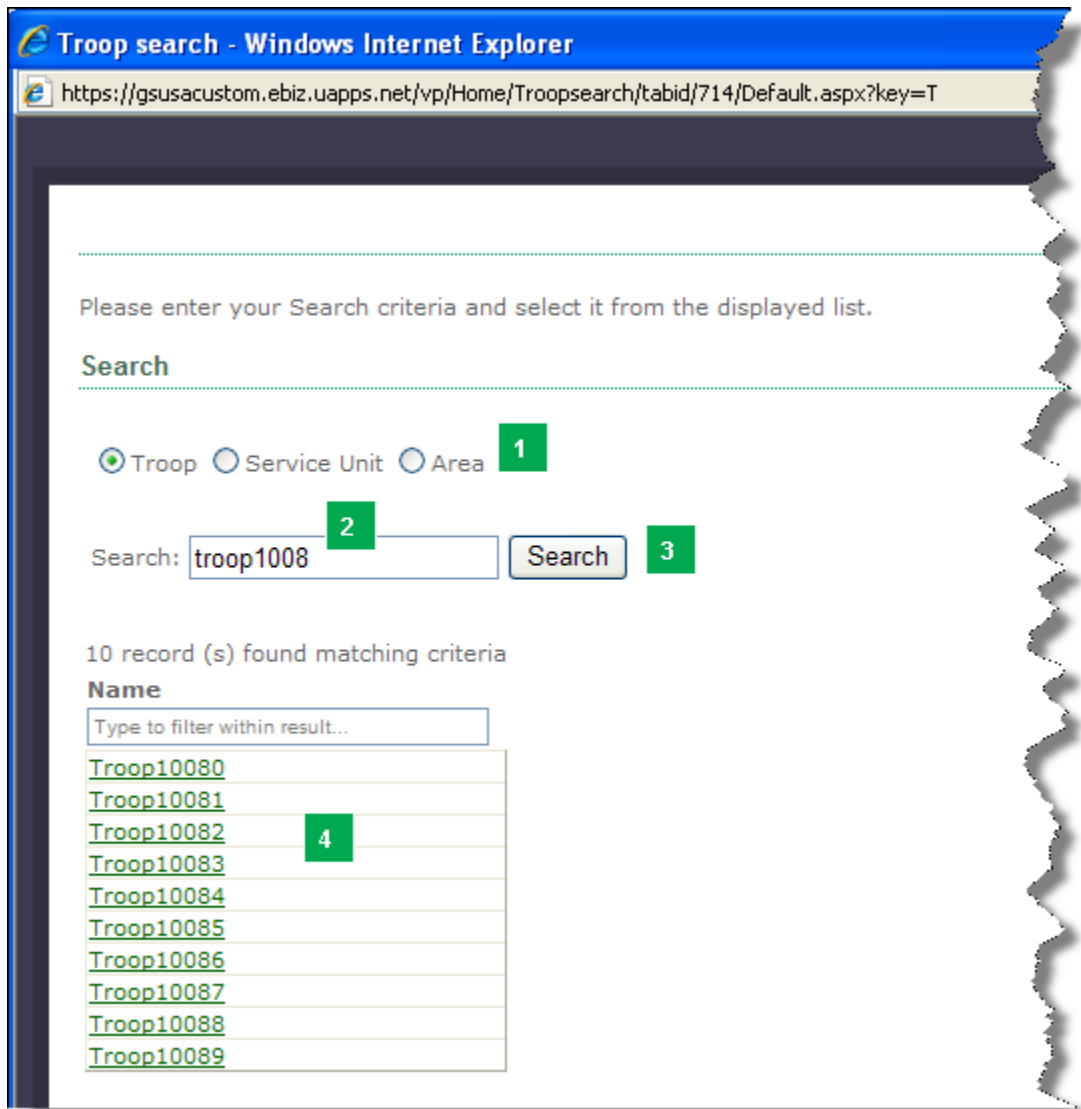
5. The **Search** screen displays in its own window. Here she completes the following steps (see the accompanying screenshot below):

1 She can select "Troop", "Service Unit", or "Area" depending on whether the position directly serves a troop, service unit, or area. Her selection dictates the type of entity she can search for in the next step. Because she is an "01", she selects "Troop".

2 She then types all or part of the troop name in the **Search** box. The portal will search for all "Troop" entities that contain the specified string in the Troop Name. Jerianne is searching for Troop10089 and could return this value in her search by entering any of the following strings: "Troop10089", "10089", Troop1008", or "1008".

3 After typing a value in the Search box, she clicks **Search**.

4 All troops that match the pattern specified in the Search box are returned. She clicks the link for the troop in which she is holding the position.



6. The Troop she selects populates in the Troop/SU/Area box. She then clicks **Add Position** to add the position to her Membership Profile.

Note: All positions are pending, subject to Council approval.

Position:

Year: 2011

Troop/SU/Area: [Search](#)

←

Note: All positions are pending, subject to Council approval.

Position:

Year: 2011

Troop/SU/Area: [Search](#)

Position	Year	Troop/SU/Area	
01 - Leader/Advisor	2011	Troop10089	Remove


7. Jerianne then repeats the steps above to add her second position of “Trainer” that she is will hold in “SU727”.

Note: All positions are pending, subject to Council approval.

Position: ▼

Year: 2011

Troop/SU/Area: [Search](#)



Position	Year	Troop/SU/Area	
01 - Leader/Advisor	2011	Troop10089	Remove

Note: All positions are pending, subject to Council approval.

Position: ▼

Year: 2011

Troop/SU/Area: [Search](#)

Position	Year	Troop/SU/Area	
12 - Trainer	2011	SU727	Remove
01 - Leader/Advisor	2011	Troop10089	Remove

8. She saves her Membership Profile, then processes payment for her registration.
9. If she goes to My Account, she sees a list of her positions for the current and following membership years. As you can see, her self-reported positions show a status of “Pending”. She is also given an “Active” position of “14-Member (No Assigned Position)” for next year because she paid for her registration and is an active member in that troop, regardless if her self-reported positions are approved or not.

My Positions

Position: ▼

Year: ▼

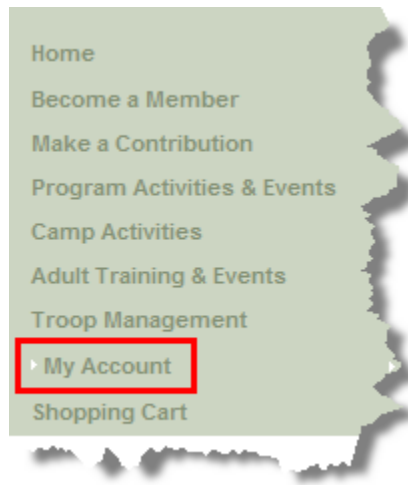
Troop/SU/Area: [Search](#)

Year	Troop/SU/Area	Position	Status	
2010	Troop10089	01 - Leader/Advisor	Active	
2010	Troop10089	Troop Communicator	Active	
2011	SU727	12 - Trainer	Pending	Delete
2011	Troop10089	01 - Leader/Advisor	Pending	Delete
2011	Troop10089	14 - Member (No Assigned Position)	Active	

Self-Reporting Online from My Account

Active members also can self-report positions any time during the year from My Account. Below we will demonstrate how Katherine can add a 2011 position of “Troop Treasurer” to her profile from My Account.

1. After logging on, Katherine navigates to My Account from the left side-bar.



2. She scrolls down to the My Positions section of the My Account page. From here she:

- 1 Selects a **Position**
- 2 Selects the **Year** for the position
- 3 Searches for the **Troop/SU/Area** in which she will serve as Troop Treasurer (see previous section for more details on this screen.)
- 4 Clicks **Add Position**.

My Positions

Position: 1

Year: 2

Troop/SU/Area: 3

4

Year	Troop/SU/Area	Position	Status	
2010	Troop10089	01 - Leader/Advisor	Active	
2010	Troop10089	Troop Communicator	Active	
2011	SU727	12 - Trainer	Pending	Delete
2011	Troop10089	01 - Leader/Advisor	Pending	Delete
2011	Troop10089	14 - Member (No Assigned Position)	Active	

3. The position is added to the list with a Status of "Pending".

My Positions

Position:

Year:

Troop/SU/Area: [Search](#)

Year	Troop/SU/Area	Position	Status	
2010	Troop10089	01 - Leader/Advisor	Active	
2010	Troop10089	Troop Communicator	Active	
2011	SU727	12 - Trainer	Pending	Delete
2011	Troop10089	01 - Leader/Advisor	Pending	Delete
2011	Troop10089	14 - Member (No Assigned Position)	Active	
2011	Troop10089	Troop Treasurer	Pending	Delete

Deleting Positions from My Account

Members have the option to delete “Pending” positions from the My Account page. This feature is helpful if a member self-reports a position incorrectly. To make a correction to a position, members should delete the position from My Account, and then add the correct position following the instructions above.

My Positions

Position:

Year:

Troop/SU/Area: [Search](#)

Year	Troop/SU/Area	Position	Status	
2010	AREA001	Troop Treasurer	Not Approved	
2010	Troop10089	03 - Troop Committee Member	Active	
2010	Troop16059	02 - Assistant Leader/Advisor	Active	
2010	Troop16059	14 - Member (No Assigned Position)	Active	
2011	AREA001	Troop Treasurer	Active	
2011	Troop16058	01 - Leader/Advisor	Active	
2011	Troop16059	02 - Assistant Leader/Advisor	Pending	Delete
2011	Troop16059	14 - Member (No Assigned Position)	Active	