



# Preparing for the Annual Subscription

This help file talks you through checking your unit's details in preparation for the annual subscriptions process and how to make corrections. For more information about Subs 2018 please keep an eye on [girlguiding.org.uk/subs](http://girlguiding.org.uk/subs) and your newsletters.

- 1) Click on 'Unit Leader' > 'My units'.
- 2) Click on your unit name.
- 3) Click on reports.

There are three subscriptions views and these can be changed using the view selector. The table below explains what each one shows you:

Members and where they are paid for	This option shows you everyone in your unit who has a 'Member' status. The main level column tells you who will be paying the annual subscription for this person.
Recognised Volunteers not needed to be paid for	This option shows you the volunteers in your unit who have a membership status of 'Recognised Volunteer'; this means that they do not receive the member benefits (membership card, magazine and access to local member only events).
Subscriptions Due	This option shows you who you are due to pay for at this unit during the next Annual Subscription process. On here you should expect to see all girls in your unit as well as any 'Member' volunteers who hold their main role in the unit.

- 4) Check the names on the report are all correct.

If the list on screen is not correct use the relevant instructions below to make the corrections.

## If you have a girl showing on the list who has left the unit

These instructions can also be found in 'Ending a Role' from the Help Zone.

- 1) Click on 'Young Member Roles'
- 2) Click on the actions arrow for the girl who has left
- 3) Click on 'End Role'
- 4) Enter the date they left the unit and click on 'update' to save the information.

*This girl will then be removed from the Subscriptions report in the next 15 minutes.*

## If you are missing a girl who attends your unit

These instructions can also be found in 'Adding to your active list' from the Help Zone.

*If the girl is a member and not on your enquiry list skip to step three.*

- 1) Click on the 'Young Member Enquiries' tab across the top of the screen.
- 2) Click on the actions arrow for the girl and select 'Confirm Role'; enter the date she joined your unit and save.
- 3) If the girl is a member and not on your enquiries list; click on 'Young Member Roles' from the top of the page.
- 4) Select the add button above the table, enter the girl's membership number and click 'Search'.
- 5) Check the details, click on the Action arrow and select 'Transfer In'; under 'Destination Status' select 'Active', click 'Submit'. A confirmation message will be displayed.

*This girl will then be added to the Subscriptions report in the next 15 minutes.*

All volunteer roles are managed by your local Commissioner; therefore for all changes to volunteer roles within your unit, please ask your Commissioner or a local Administrator to make the changes.

All of the following scenarios are common requests:

My Occasional Helper is showing to be paid for, how can I change this?

The first thing is to check whether they would like to be a member, this role is a member optional role, therefore they can choose to be a member.

If they do not wish to be a member, then your Commissioner will need to change their membership status to 'Recognised Volunteer' by:

- 1) Clicking on 'Individuals'
- 2) Clicking on the action arrow for the volunteer and clicking 'View Individual'
- 3) Changing the status in the membership status box
- 4) Clicking update to save the change

*This will remove the volunteer from the subscriptions report within 15 minutes of the change.*

NOTE/ If the volunteer holds another role, that requires them to be a member, the system will stop this change being made.

One of my Leaders should be paid for with a different unit, how can I change this?

The first thing is to double check where the volunteer is going to be paid.

To change the main role your Commissioner will need to:

- 1) Clicking on 'Volunteer Roles'
- 2) Clicking on the action arrow for the specific role that is to be changed to the main role and clicking 'Edit Role'
- 3) Checking the 'main role' tick box
- 4) Clicking update to save the change

*This will move the volunteer to be paid at the other level within 15 minutes.*

I'm missing a volunteer from my unit, how can I add her?

You will need to speak to your Commissioner as they will need to either add the volunteer to the unit, or check on the progress of their recruitment checks as part of the joining process.

*Once the volunteer shows on 'volunteer roles' with a membership number they will also show on the Subscriptions report as required.*

I've got a volunteer showing who has left, how can I remove them?

You will need to speak to your Commissioner as they will need to follow the steps below to remove them from your unit. These instructions can also be found in 'Ending a volunteer role' from the Help Zone.

- 1) Click on 'Volunteer Roles'
- 2) Click on the actions arrow for the specific volunteer role for your unit
- 3) Click on 'Deactivate Role'
- 4) Enter the date they left the unit and click on 'update' to save the information.

*This volunteer will then be removed from the Subscriptions report in the next 15 minutes.*