

A GSL's Guide to Compass and Disclosures

Welcome to Compass. This Guide will be a re-statement and reminder of material familiar to some, and a complete new topic to others. It should complement not supersede the “official” help facilities.

The Guide will also be useful for Assistant Group Scout Leaders, Group Administrators and holders of certain District roles.

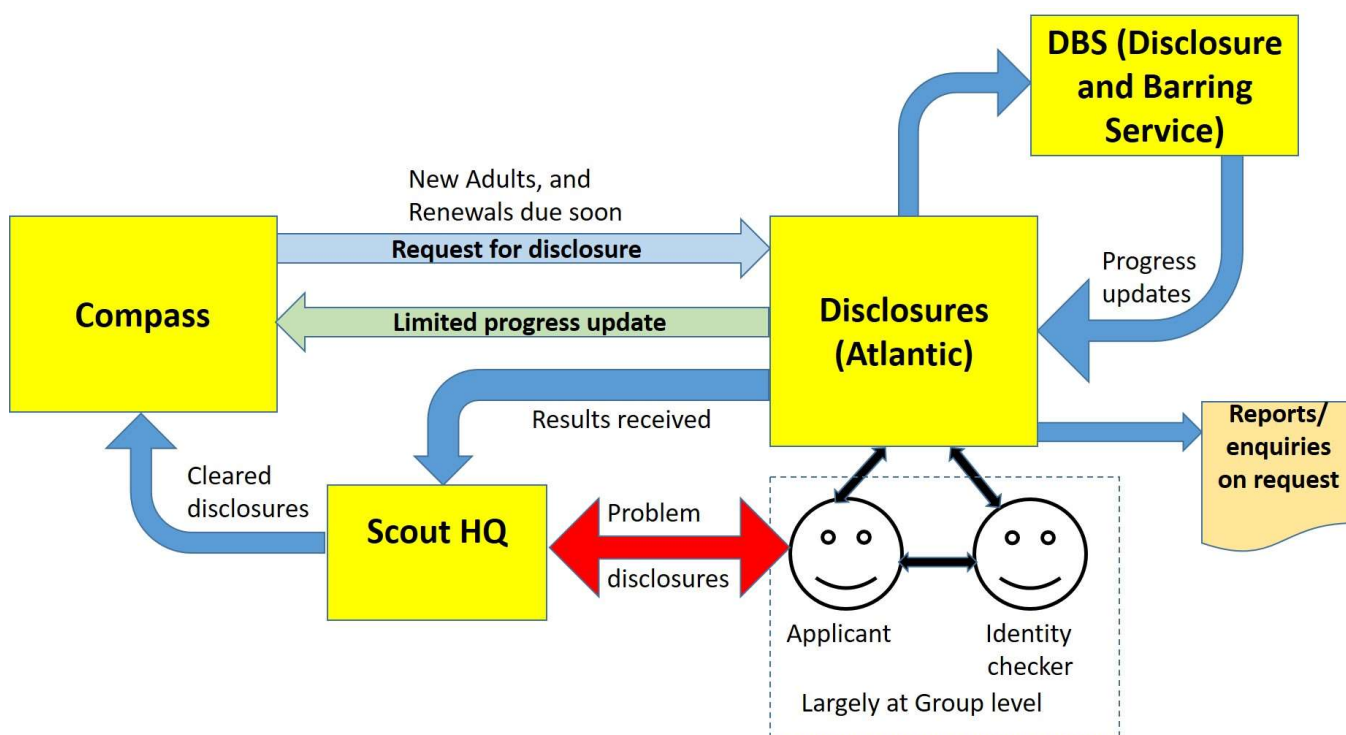
1. Background.

Be aware that there are two computer systems you need to use: Compass and Disclosures. (Disclosures is also known as the Atlantic system as it is supplied by Atlantic Data.)

Compass is the Scout Association's central records system for all¹ adults involved with Scouting. It also keeps data on past members, on the good side so that anyone re-joining gets credit for past service and training but also to help keep out people who have proved unsatisfactory or worse in the past. Compass currently only operates for over 18-year olds².

Disclosures is the computer system that enables submission of data to the Disclosure and Barring Service. It does not actually conduct the DBS checking. Scotland and Northern Ireland have different procedures.

The relationship between these two systems is shown in outline below.



2. Getting access.

Both systems can be accessed from the home page on www.scouts.org.uk, on the drop-down menu under “Info for volunteers”, or you may prefer to set up your own favourites/bookmarks. The first time you access Compass you have to register. The links for registering (and for forgotten usernames and passwords) are at the bottom of the login page. **If you are registering for the first time, spend some time following the link on the login page to the Compass support site, viewing the introductory video and reading How to Register for Compass.**

¹ Except those occasional helpers who do not meet the Occasional Helper criteria (see Section 6).

² Except that an Explorer Scout, etc, can be added at 17 ½ years so that they can get DBS clearance by their 18th birthday.

When you first register for Compass you should be/have been sent an email inviting you to register for Disclosures (assuming you have an appropriate full role.) If you have forgotten this, there is advice and a link “can’t access your account.” Your username and password on Disclosures are NOT the same as on Compass. On Disclosures, your Username is your Scout Association membership number. Passwords on Disclosures expire regularly every 3 months. Follow the password change instructions. **You need to be able to log-on to Disclosures as well as Compass to be able to request Disclosures for new adults or renewals, even if it is not you who will conduct the identity check.**

Your role in Scouting determines what you can do and whose records you can see. If you have more than one role in Scouting, a drop-down list will allow you to select the role that you want to use for whatever you are about to do. This applies in slightly different ways to both Compass and Disclosures. This document assumes you are using your Group Scout Leader or Group Administrator role.

3. Check your own data

As a Compass user you are responsible for the accuracy of your personal data.

Click “My Profile”. Under your Membership Number and name is a tab for Personal Details. The system will normally go straight to this tab. On the Personal details page there are various sections – expandable by clicking the right arrows which then turn to down arrows.

Check carefully Personal Details and Contact Details – because other people rely on the accuracy of this information, not least to get in touch with you. If you want to make a change, click the appropriate edit button on the right of your screen. Make the change and save it.

If something is wrong that you cannot change, (it will be greyed out) e.g. spelling of your name or your date of birth, contact your District Appointments Secretary urgently.

Notes: Phone numbers are entered with no spaces. You must select the type of email address (one of which is ‘no current email’ and you must select the type of phone number. Also indicate the preferred phone number and email with the buttons to the right. It is mandatory to enter a phone number but a phone number of 0 (though unhelpful) will get you through the checking and allow you to save that and other changes.

You can then view your Roles, and any other tabs. If you do not show a full role that you believe you hold, contact your District Appointments Secretary.

More details about checking your personal details can be found in “Every Use’s Guide to Compass”.

4. Understanding Hierarchy and Roles

You will find life easier if you appreciate that Compass works with both Groups and Group Sections. (Similarly Explorer Scout Units, Scout Network and Scout Active Support Units are known as District Sections.)

Compass keeps a record of what Sections a Group (or District) has. It needs to know if you open a new section, though closing one you no longer have is more of an issue. You can change the section title to e.g. “Scout Troop (closed)” but you can’t actually close the section if it still has adults with roles in it. You also should have the District’s approval before opening or closing sections. If you have two or more of a particular age-group section, e.g. 2 Beaver Colonies, you need to list them all.

You can check what Sections your Group has on the system by selecting “My Scouting”. You can also edit data like meeting times, but please also make sure I know for the District Directory, as I do not intend to go hunting through Compass on the off-chance that you have made a change there and not told me!

There are only three roles that can be held in a Group Section:

- Section Leader
- Assistant Section Leader
- Section Assistant

These titles should be qualified by section type (Beaver, Cub or Scout) using the “role variant”. All other roles are at Group level or above. Unusually there is a Group level Section Assistant as well as the Sectional level Section Assistant roles.

If a leader, etc., is involved with more than one section, even of the same age group, they should be given roles in all the sections concerned.

5. Check your Group’s adult membership list

Go to Compass and select Messaging/Reports, then Reports. You will get a list of reports you can run. You should see a list of six reports:

- Group Appointments Report
- Group Disclosure Management Report (covered in Section 6 below)
- Group Disclosure Report (covered in Section 6 below)
- Group Member Directory
- Group Permits Report
- Group Training Report

The Group Appointments Report shows one line for each recorded role in your Group for all the people who have any recorded roles in your Group. Note there are various selection options. The pdf option shows names, etc. once, whereas the Excel option shows the full data on every line. This only matters for people with multiple roles, but is helpful if you intend to export the data and sort it.

You can export the data to a spreadsheet. There are various options, but most people prefer to use the “export as Excel” option because subsequent selection and manipulation is easier.

Your key responsibility here is threefold:

- To identify any roles that are no longer applicable and get them closed.
- To identify any roles that are missing. Think particularly about roles such as Group Executive Member, which have often been overlooked in the past or appear only as Occasional Helpers. Note that Section Leaders have a right to be Group Executive Members, unless disqualified, and if they choose to take up the option they should be recorded with this role in Compass.
- To keep an accurate record of contact data for your members, particularly those who cannot access their own data – either because they are not computer users, or they have pre-provisional roles.

To ADD a new adult to the system, either get them to complete an Adult Information form OR do it on-line while they are with you. My preferred method where possible is to get the new adult to complete the editable pdf version of the form and then copy and paste the information into Compass so that you don’t introduce any typing errors or have problems reading handwriting. Add adult can be accessed in Compass under the Joining tab. **You must use their full legal name(s) when adding a new adult.**

It is essential that you discuss with the applicant the implications of the role they are taking on. It is much less effort to get the right role from the start that to make a change later during the appointments process or getting started. If in doubt, start them as an Occasional Helper so you can get the DBS check done, and then give them a role in a Section when you have got to know them and they have got to know you. You can always backdate the start of the “proper” role. Also be careful not to ask them for referees if you don’t need them (which is the case for Occasional Helpers).

Nearly 18's. Compass should only be used to record adults (over 18's.) The only reason to add someone who is not yet 18 is when the processing of the DBS check could delay plans. For example, when someone is planning to go on camp shortly after their 18th birthday. Give them a role start date of their 18th birthday, and check what you have put in very carefully before you log out. Their Compass record will not be visible until their 18th birthday, but the Disclosure request will appear in the Disclosures system overnight.

Adult Information (AI) forms may be obtained free in hard copy from www.scouts.org.uk Shop / Leaders / Publications and resources or downloaded from www.scouts.org.uk Info for volunteers / Running things locally / Recruiting and managing volunteers / Appointing / Appointment forms.

The District Appointments Secretary will be notified by Compass of any new adults or new roles added for existing adults.

If the role requires a Disclosure, and the applicant does not show a current one on Compass, the system will generate a disclosure request overnight if you have not used the facility to request one when you entered the role.

If the role requires references, this will show on the Approval tab for the particular role. References are required for Section Assistants, Leaders and Assistant Leaders, but not for Occasional Helpers or Executive roles. Be aware that references will normally be required if someone moves from a role which does not require references to one which does require references.

To **ADD A ROLE** to an adult who is already known to Scouting, but not in your Group, you can either – ask the District Appointments Secretary to make the addition (if they are in the District) or you can go through the Add Adult process. You will need to know their surname, date of birth and last postcode known to the system. Avoid creating a new membership number for someone who has had a previous adult role in Scouting. If you suspect you have done this, please inform your Appointments Secretary.

To **ADD A ROLE** to an adult already in your Group, I recommend viewing the roles tab on their record first and then using the Add Role button. You can, if it is appropriate, also specify a role that is being given up. In this case, the old full role will remain visible until the new role becomes Full, at which time the old role will be closed automatically.

To **END A ROLE** for one of your adults depends on whether it is a full role or a provisional or pre-provisional one. Select the role tab on the member's record. There will be an End button on each full role you can end. Select the button and follow the instructions. If you end a role by mistake, notify your Appointments Secretary and it can be reinstated. There are additional requirements if you wish to end a role "unsatisfactory." For roles which are pre-provisional or provisional, use the edit button to end them, change the end date for the role and save the result. Note that if you end the last role of one of your adults, or the last role in your Group, you will not be able to view the record and will be shown a message to that effect.

Personal and Contact information: You are also responsible for the accuracy of personal data such as the contact information for those who cannot maintain their own (e.g. because they have no online access.)

Those with email addresses recorded can register and change their personal data. Each Group should nominate one or more people in the Group who can update the records of those who cannot do it themselves, and make others aware of who is doing this task. They may need to take the additional role of Group Administrator.

The Group Directory Report is a better source for identifying contact detail errors. It shows only one row for each adult, but shows rather more contact information, etc., with multiple phone numbers and email addresses and each separate line of a postal address.

To update contact data, select the person's record and you will immediately get their Personal Details tab. There are sections labelled

- Personal Details

- Contact Details
- Additional Needs/Disabilities
- Qualifications and Skills
- Hobbies / interests.

Sometimes there is a right arrow in front of the section title. Click it and it turns to a down arrow and shows the appropriate detail. If you click the “Send to pdf” tab on the Personal Details row you get a pdf of all the contact information which can be printed or e-mailed to the data subject for checking.

If there is an error in a greyed-out box, e.g. a spelling error in a name, you will have to contact the District Appointments Secretary for resolution. Evidence may be required and the actual change is made by HQ.

There are some quirks you should be aware of:

- In the Personal Details section you can only save an update (e.g. for “known as” name if the mandatory fields are completed. These are Ethnicity and Faith/Religion. Prefer not to say is a valid answer for either or both and there is only one option for Christian (not individual sects).
- Post codes always have to be entered with the customary space, but phone numbers have to be entered without any spaces.
- If you click the postcode box in an edit you will be offered all the postal addresses in that postcode to select from. This is the easiest and best way to check a postcode and to get a postal address in the form approved by Royal Mail. A surprising number of people do not know their correct address!
- In the Contact Details section there must be an email address, but one of the drop-down options is “no current email”.
- Also there must be a phone number, but the system accepts a phone number of 0!
- The “radio button” which is nearer to the social media area actually belongs to the phone number area.

The Additional Needs / Disabilities section has no immediate use other than as a repository for your own records, but it may be expected to be used for census purposes at some point in the future.

6. Managing disclosures

As a GSL your role includes making sure that all those adults who require a Disclosure have one and renew it when it falls due.

You can run a **Group Disclosure report** on Compass in various versions, showing Disclosures which expire in the chosen period (up to a year ahead). The “pending” option does not help at all, because data disappears as soon as a Request has been passed to the Disclosures system. Note: You can see ALL your members on the Group Appointments Report, but their disclosure details no longer appear there.

There is a button on each member’s Disclosures tab which allows you to request a Disclosure. Compass forcibly passes a Disclosure Request to the Disclosures (Atlantic) system 30 days ahead of expiry, although it could usefully be longer. Normally you can request a Disclosure 6 months before a renewal is due. In special circumstances HQ can request a disclosure outside these time limits – contact the Information Centre.

A returning member may still be within the 5 years of a disclosure issue, but if they have been without a role on the system for more than 30 days, Compass will have ended their disclosure at the end of their last role and will therefore generate a new Disclosure Request.

You can also see all Disclosures needed but not yet despatched to the DBS service using the Atlantic system. When you log in, you get a Dashboard with the number of disclosures in each category. Click the numbers in the Application Status boxes and you will get a list (limited to those within the selected dates.) To access the individual entries you need to put a name or membership number into the Applicant Search boxes on the left. (The first 3 characters of a name is sufficient.)

The main steps in the Disclosure (Atlantic) process are:

1. "Disclosure Requested": The subject's basic information has been passed from Compass to the Atlantic system. Overnight the name disappears from the Disclosure Reports on Compass.
2. E-invitation sent: Someone (such as you) has asked the system to send an email with a temporary password asking the subject to select online the documents needed to establish his or her identity. [The rules for eligible documents are complex, and this can save wasted journeys, but only for people who have email addresses passed over from Compass.] If you do not use this process you do it with the applicant present at the start of identity checking.
3. Identity Check: This should normally be done by the identity checker and the subject together at a place with online access. If someone is listed as Awaiting Identity Check it means they have chosen enough documents which they should have available when and where you meet. If it is impractical for an identity checker to meet an applicant in a location with on-line access, you can use an Identity Checking Form (England & Wales) available from the same sources as given above for Adult Information Forms. Follow the instructions on the form.
4. Pending Applicant information: Once the identity has been checked, the system will issue a temporary password for the applicant. They can choose whether to complete the information, such as past addresses and any offences, either at their convenience or straight away on the computer you have been using to record the identity checking.
5. The now completed Disclosure information is sent to the Disclosure and Barring Service, who cross-check with other data sources including the local police force(s) for current and past addresses (which is probably the most common source of delay.) HQ can see the progress through the DBS checks, but cannot speed them up unless agreed maximum timescales are being exceeded. You can also see the progress through the stages by using Applicant Search, which can be useful if you are not sure whether a disclosure is still being processed.
6. The disclosure is completed: a status of "Result Received" is put on the Atlantic system. **CAUTION: This does not mean that you are clear to use the individual.** You must wait until HQ have put a cleared disclosure onto Compass. If the Disclosure Result is anything other than totally clear, the Vetting Team at HQ will ask the applicant to send them the original DBS result, which they will copy and return the original. Only then will Vetting know what is revealed, and they will then act according to the table in POR - The Appointment Process. HQ will contact the District Commissioner if they are unable to clear the disclosure themselves. You can sometimes help by tactfully making sure the applicant has received a communication from HQ and has sent the DBS certificate to HQ.

At any stage before the transmission of data to the Disclosure & Barring Service you can cancel a Disclosure request. If the reason is that there was an error in the data transmitted from Compass, get the error corrected first. If the reason is that the applicant no longer seeks or holds a role that requires a disclosure (or any role at all) you must close the Compass role(s) that required the disclosure. The Disclosure Request in Atlantic should be closed automatically (but not instantly), so it is recommended that you close it manually.

Occasional Helpers: If the answer to any of the below is 'yes', then they will need to be recorded as an Occasional Helper on Compass:

- Are they assisting with overnight activities (a residential experience or night hike)?
- Could they have unsupervised access to young people on the camp?
- Will they be helping out more than once a month?
- Could they have unsupervised access to young people?
- Will they have involvement with the handling or management of funds (i.e. collecting the weekly subs and/or camp fees)?

If the answer is no, then they do not need to complete a Disclosure Check and do not need to be recorded as an Occasional Helper. Indeed it is not legal to require disclosures of applicants who do not meet the criteria above (collectively known as "Regulated activity"). If they remain as Occasional Helpers on Compass then you will be chased for Disclosures. However, once they have Disclosures it is acceptable to leave them on the

system unless you have lost contact with them. They should ideally be deleted from Compass before a replacement Disclosure is required. **Do not close the OH role until you have a local record of any contact information you need.**

Checking the status of a disclosure. You can enquire on the status of a disclosure that is in the pipeline either by searching for the member on the Disclosures system (even after disclosure application has been submitted, or by looking at the Disclosures tab on the member's Compass record. (If you have entered a member on Compass in anticipation of their 18th birthday, you will not be able to view their Compass record until they are 18.) Sometimes you will see both the current DBS application with its status and a previous application which is shown as Result Received.

The **Group Disclosure Management Report** is a summary report, but clicking on the blue underlined numbers will enable you to view some detail. It also provides a way of seeing the system status of someone who has been suspended for not having a current disclosure or disclosure submission, and whose Compass record you cannot otherwise view. This does not cover other reasons for suspension.

7. Permits

Compass is the only accepted source of permit information. If a permit does not appear on Compass it is not valid. Use the **Group Permit Report** to see which of your members hold permits, and when they expire. It is a GSL's responsibility to ensure that activities requiring the holding of a permit are run by permit holders.

Be aware that there is no such thing as a specific Shooting permit in Scouting. This is because shooting has its own legal requirements.

8. Marriage, Divorce and other name changes.

All sorts of problems arise about changing names. HQ may insist on seeing evidence, or at least on the Appointments Secretary seeing evidence. All the documents presented must have the same name and the current address. It is therefore easier to do an identity check just before, rather than just after a planned name change, such as marriage, or a planned house move.

Sex changes can also be handled smoothly by HQ, but legal constraints of the DBS checking process do not currently allow options other than Male or Female.

9. Software specific tips

If you use Firefox as your browser, when running a report the "View Report" button sometimes shoots off to the extreme right (off screen.)

10. Improving this document

If you have any ideas for improving this document please make them to tony.crackett@ntlworld.com .
Thanks.

Tony Crackett. Croydon District Administrator.