Health and Safety Event Integration in Trail Life Connect

This document outlines enhanced features available when creating certain Calendar events in Trail Life Connect. When activated, events may contain additional options and items that integrate with standard Health and Safety practices to ensure proper event planning and preparation. Views and instructions are shown from the perspective of the Troop Ministry Liaison.

Items of Note

A few integration items can be found within 3 different sections of the Trail Life Connect site, which will come into play when creating Events on the Calendar. Understanding these items first will be beneficial when creating events that include the additional tool set. Specific integrated items to highlight are: Health Form indicators, Swimming Competency, and Vehicles.

Health Form Indicators

Within member profiles, the TML can record relevant information related to an individual's CPR certifications (description, certificate number, expiration date.) Also within this section are fields to record the date when a member's Health Form was filed as well as the filing date for a High Risk Medical Form.

Swimming Competency
A menu item also exists under "Advancement" on the left menu, titled "Swimming Competency."

Clicking this link will produce the 'Swimming Competency Report' page, where member names and swimming status will be listed. To populate the list, click the button to "Record New Swimming Competency Test."

The resulting page for recording a new swimming competency test allows information entry for one or more individuals. First, select the appropriate certification method. If allowing a lifeguard/instructor to sign now, the section below presents information fields for entry of lifeguard/instructor name, certification information, and digital signature.

If the other Certification Method option is chosen, to Upload a signed "Swimming Competency Test," then the instructor certification and signature section is replaced with a simple document upload interface.

Upload a scanned signature page from an existing "Swimming Competency Test" document.

Upload document *

Drag & drop files here …

Select file …   Cancel   Select File

The final section is for recording the assessment date and allowing for one or more Trailmen to be selected. Each participant's swimming level can be marked and then submitted for population to the report screen.

Swimming Competency Record

The individual certifying that s/he has verified the competency test and classification of the participants below, should check only in the box of the highest degree of the participant's swimming competency.

Date of Assessment *   📅   ✖   10/07/2021

Select Trailmen *   Forester, Finn ✖   Aiken, Campy ✖   Tentpeg, Tim ✖   ✖

#	Participant's Name	Date Tested	Troop #	Swimmer	Beginner	Non-Swimmer
1	Forester, Finn	10/07/2021	GA-0000	☐	▪	☐
2	Aiken, Campy	10/07/2021	GA-0000	▪	☐	☐
3	Tentpeg, Tim	10/07/2021	GA-0000	▪	☐	☐

🏃 Submit Swimming Record

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When records are present on the 'Report' page, the list can be sorted and filtered using menu bar selectors at the top of the list.

The Troop Members list will also display a visual swimmer icon indicator for quickly determining whether a Trailman is a competent swimmer.

Vehicles
For leaders with the appropriate permission applied to their role, they will find a menu item under the "Troop Settings" menu titled "Update Vehicles."
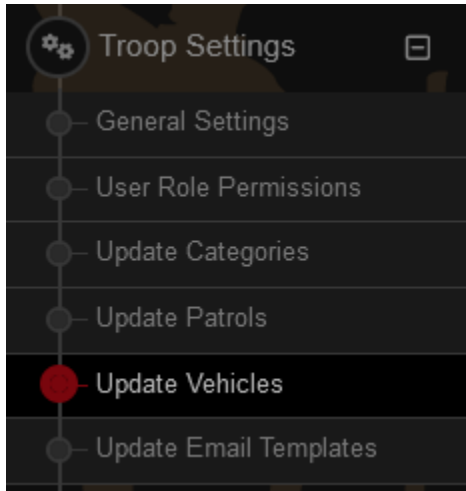
The resulting 'Update Vehicles' page allows for viewing a list of all vehicles that have been logged, with corresponding information. New vehicles can be added by entering the appropriate information and clicking the "Create Vehicle" button. Any vehicles no longer relevant can be removed by clicking the delete icon to the far right of the listed vehicle.

Creating Calendar Events – Enhanced Features

Adding Events to the Trail Life Connect Calendar has been a possibility since the Calendar was released. With Health & Safety integration, the creation of events involves an expanded feature set, including the items outlined above. Standard events can still be created if no specific activities are listed. The expanded integration comes into play when a list of specific activities is chosen for a particular event.

After clicking "Create Event" on the left menu, or clicking empty space within a date on the Calendar, you will see the familiar event creation page.

*Tip: for multi-day events, click and hold the mouse button on the first day, then drag the mouse pointer to the last day and release the button. Then, only the times will need to be adjusted during setup.

On the "Create Event" page, select an event type and then change "Event has activities" to "Yes." The Activities field will appear for choosing specific activities related to the event.

With selected activities displayed, give the Event a title and description and check your date(s) and time(s.)

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Activities *	Swimming ✕ Camping ✕ Hiking ✕ Horseback Riding ✕ ✕
Title *	Navigator/Adventurer October Campout
Description	`<>` B *I* S̶ ☰ ☰ ☰ ☰ 🖼 🔗 ☰ — ⤢ This is our monthly campout, to be held at Rainbow Falls. We'll be hiking, swimming, and horseback riding. Navigators will make breakfast Saturday.
Tags	Add tags to better identify this event.
Event Date & Time *	📅 10-15-2021 05:00 PM to 10-16-2021 05:00 PM
Timezone *	Eastern

Enter the venue name and address, if applicable. Enter departure and return details, if applicable. Provide Guide or Outfitter details, if applicable. Check the box if this event also involves AHG.

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Venue Name	Rainbow Falls	
Venue Address	123 Falls Rd	Address line 2
	Anytown	Georgia
	30577	

For Troop activities and events where travel is involved, you can add specific departure and return details here.

Departure Details	📅 ✕ 2021-10-15 16:00 Leaving date & time	Church Parking Lot
Return Details	📅 ✕ 2021-10-16 17:00 Returning date & time	Church Parking Lot
Guide/Outfitter Details	Georgia Outfitter	Jimmy Pinkerton jp@goutfit.org 888-512-3456
AHG	☐ Check here if this event includes overnight camping with an AHG Troop.	

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In the Advanced details section, provide applicable event details that apply. If needed, differentiate between Troop and Participant fees, including any deposit costs and due dates.

Choose who can view the event on the Calendar – either by role, listing specific members, or choosing specific patrols or levels. Choose whether to include as a Public event and whether or not to activate RSVPs.

If you specify levels or patrols, there is an additional checkbox option to also include the adults in a Household (leave this checked to allow a responsible adult in the Household to provide RSVP info for their Trailman and/or other invited adults.) For the RSVP section, the option exists for specifying a cutoff time for collecting RSVPs.

Trail Life

Managing Calendar Events

Once an event has been created, several tabs with various features become available to provide further event management. The 'Event Setup' tab is essentially the same interface used when initially creating the event and allows for any changes to the event as needed. Each of the other tabs contain their own unique items to highlight.
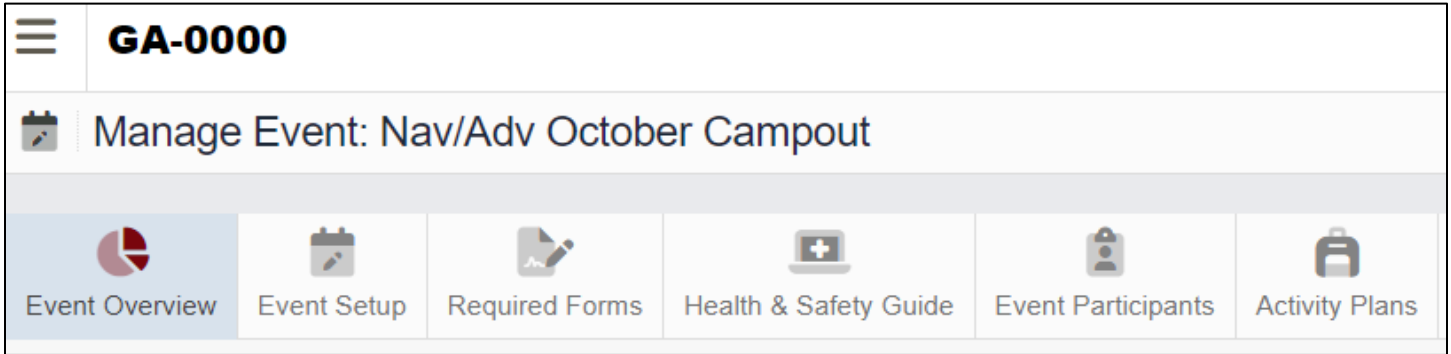
The 'Event Overview' tab provides quick summary information, as well as statistical reports regarding RSVPs for tracking overall attendance. Click the "RSVP Link" button to copy the link to your clipboard and then use the link in a separate email to members, or in an Announcement. Send an email from within the event to those invited, using the email icon in the corresponding section header. (The email icon will only appear if one or more members are present within a section.) Mark RSVPs manually, if necessary, by clicking the corresponding color indicator (or by drag and drop of the name to the relevant category.) Finally, if a reportable incident occurs during the event, a link to the "Incident report form" is available at the bottom of the 'Event Overview' tab.
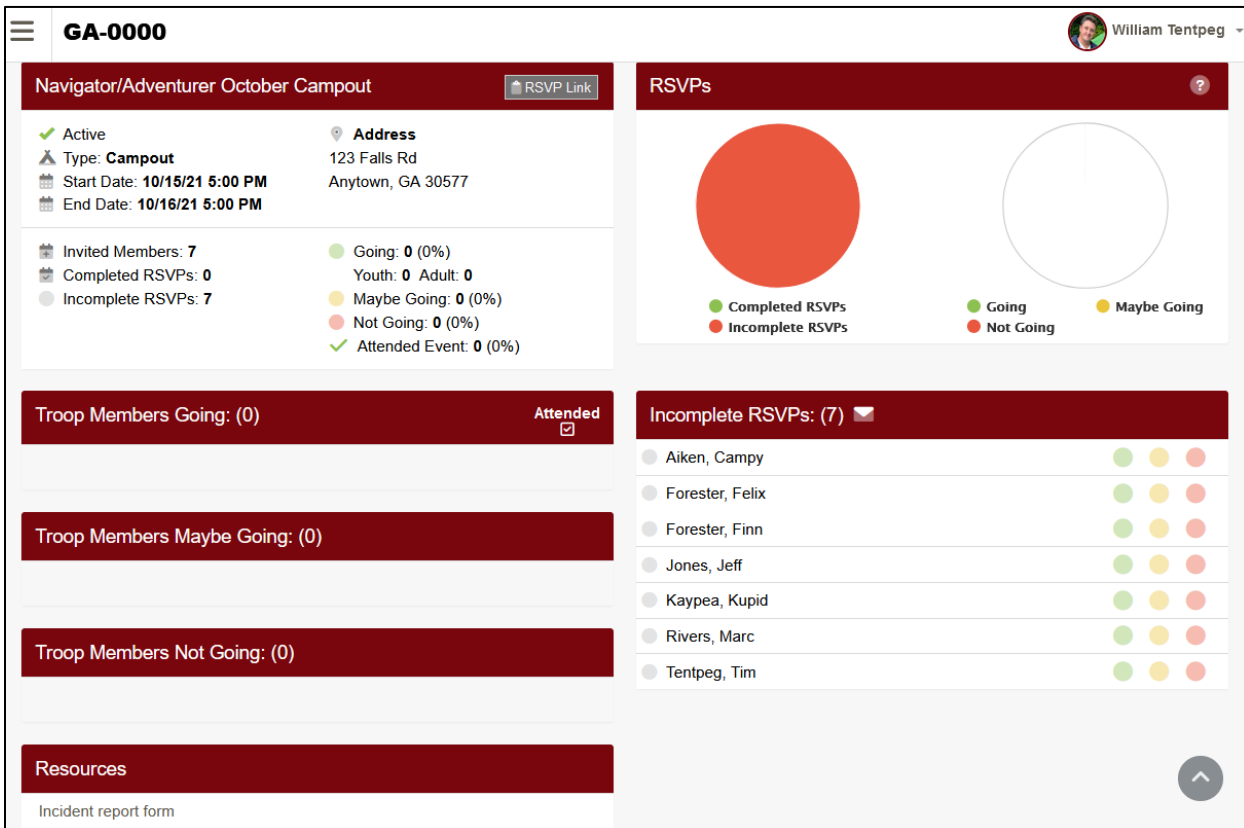
The 'Required Forms' tab brings together the list of forms that need to be completed for the specified event. These forms are available to be completed by event leadership. Color (as well as text) is used to indicate status. Green = completed; blue = ready to be completed; gray = not yet available. Completed forms will also display when the form was completed and who signed the form.

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📅 Manage Event: Navigator/Adventurer October Campout   🔲 Dashboard > 📋 Update Event

| Event Overview | Event Setup | Required Forms | Health & Safety Guide | Event Participants | Lesson Plans |

Required Forms

Leadership Form ✓
Status: Form has been completed
Assigned to: Event leadership
Completed on: 10/08/21 1:56 PM
Signed by: William Tentpeg

Risk Management Form
Status: Form is ready to be completed
Assigned to: Event leadership

Transportation Form
Status: Form is ready to be completed
Assigned to: Event leadership

Family Camping Form
Status: Form is ready to be completed
Assigned to: Event leadership

Troop Event Submission Form
Status: Waiting on other forms
Assigned to: Event leadership

TML Approval Form
Status: Waiting on other forms
Assigned to: Troop Ministry Liaison

Each form has corresponding information to complete. The "Leadership Form" contains a short summary of important information, then fields to specify the various leader roles required or available for the event. The fields include:

- Event Organizer
- Troop Activity Coordinator
- Event Health and Safety Officer
- Troop Healthy and Safety Lead
- CPR, AED, & First Aid Certified Leaders Attending
- At-Home Emergency Contact

Below the list of various leaders in the "Leadership Form" is a space for a digital signature before submitting the form. If all of the information is not yet known, but some has been completed, you can choose the option to "Save Current Progress and Finish Later." However, if all of the information is complete, the leader can sign and submit. Also at the bottom of this form is a focused section from the digital Health & Safety Guide containing information for reviewing items specifically relevant to this particular form.

Each successive form follows a similar format. The form begins with a brief description, followed by any relevant information that needs to be completed, then a space for digital signature and submission. The bottom of each form also contains the Health & Safety Guide snapshot section that is relevant to that particular form. In the example being used within this document, the "Risk Management Form" contains a checklist of risk items to consider and document. The "Family Camping Form" is mostly informational with a signature and submission acknowledging the policy highlighted in the Health & Safety Guide.

The "Transportation Form" allows for selection of drivers and vehicles being used for this event. The ability to select vehicles is directly related to the 'Update Vehicles' page under the "Troop Settings" menu, covered earlier in this document. (The "Transportation Form" will be present within all expanded events, even though specific transportation may not be a factor. In scenarios where specific transportation items aren't relevant, this form simply serves as an acknowledgement of the overall transportation policy.) Finally, there is the signature and submission portion of the form, as well as the Health & Safety Guide snapshot of the section related to 'Vehicle Transportation.'

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🚗 Transportation Passenger Van Form

⊘ Dashboard › 🚐 Transportation Passenger Van Form

Due to the high risk nature of 12-15 passenger van usage, Trail Life has allowed Troops to use these vehicles only if the van is a 2010 model or newer, equipped with an electronic stability control system, and if the driver is 25 years of age or older with a valid CDL license.

Certain states do not require a CDL license to operate this type of vehicle. In those states, a Trail Life leader who is 25 years of age or older can complete a CDL waiver request with the Trail Life Home Office.

Transportation Passenger Van Form

Driver's name	Tentpeg, William ✕ ✕
Select the vehicles being used	Bill's Van ✕ ✕
Are you using a 2010 or newer 12-15 passenger van?	No
*	✔ I have read and will ensure the Transportation Policies are followed.
*	✔ I have read and will ensure the Passenger Van Policies are followed.

Signed by

Full Name *	William Tentpeg
Date	10/08/2021
Signature *	SIGN HERE 🚫

➕ Submit Form   💾 Save Current Progress and Finish Later   ← Return to Event

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HSG & ARRG / HEALTH & SAFETY GUIDE / FACILITY, MEETING, AND TRIP SAFETY / Vehicle Transportation

Search

Vehicle Transportation

🏠 Trail Life

Completed forms, when accessed after submission, will display the provided information and show the signature portion with date stamp and digital signature. If any changes need to be made, the option to click the "Modify Form" button is available.

After all required forms have been completed and submitted, the "Troop Event Submission Form" will become available for an event leader to indicate they have reviewed all of the information and are ready to submit for TML approval.

The final "TML Approval Form" allows the Troop Ministry Liaison to either approve or not approve the Event. If the TML feels more information is needed, they can select the option for further review and provide notes to the leaders regarding what is needed. The leader in charge of the event will be notified and can update information where applicable.

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TML Approval Form

Dashboard > TML Approval Form

As the Troop Ministry Liaison, you have the responsibility of approving all Troop activities before they populate the Troop calendar. Your approval serves as the Charter Organization approving its Troop ministry participating in this particular activity.

After reviewing the Troop activity forms connected to this activity, you will need to decide whether or not your Charter Organization will approve this activity, not approve this activity, or hold for further review. Additionally, if your state requires state-specific permission form language, you will need to add that on this form to be included in the parental permission form.

*Note, if you select that this activity needs further review, an email will be sent to the Troop leader in charge of this activity to review and update the activity information for this event.

General Risks

I have reviewed the event and raised any questions with Troop leaders *

○ Needs further review
○ Approved
○ Not Approved

Event Notes (viewable by other leaders)

Trail Life

For any forms which need to be completed or signed by a particular member, a notification will appear on their respective Trail Life Connect Dashboard under the 'Notifications' section. (Including permission forms for youth Trailmen, to be signed by the parent or guardian.)

The 'Health & Safety Guide' tab of the 'Manage Event' page provides focused sections from the digital Health & Safety Guide, separated out by the specific activities chosen for the event. Many of these sections are also present at the bottom of the required forms to be completed within the 'Required Forms' tab. The 'Health & Safety Guide' tab, however, brings the activities all together in one section for review, rather than needing to click into each form to locate the information.

The 'Event Participants' tab of the 'Manage Event' page displays several status indicators for those who are included on the Event. Names and levels are displayed as well as whether the participant is a youth or adult. Filtering is possible by RSVP status and/or Swim Level. Other columns show the status for whether Event fees have been paid, if health forms are on file, and receipt of a digital permission form for youth Trailmen. If known, the status for Fee Paid and health forms can be changed here by clicking the indicator to toggle between yes or no. *If the Health Form and/or High Risk Medical Form submission dates have been recorded within the member profile, these will already be checked, respectively. Attendance at the Event can also be recorded here (in addition to similar controls on the 'Event Overview' tab.) Fields along the top columns allow for searching, sorting, and filtering as needed. Finally, the option exists to export the displayed list to Excel or CSV files.

(*Observational Note: the above event is not yet ready for final TML approval, as the event does not yet have two-deep leadership.)

The 'Activity Plans' tab of the 'Manage Event' page provides the opportunity to list out any specific Woodlands Trail lesson plan, or Navigator/Adventurer Badge or activity being covered at the event. Complete the corresponding information regarding the Level, Patrol (if needed,) Primary and Assistant Leaders, the specific Badge or Activity, sub-items where applicable, and any notes. Click the "Create" button to add the activities to the list. For Navigator and Adventurer Badges, a download link will be available for the Badge requirements. For events involving Woodlands Trail, first select the Branch and then the specific lesson(s) being covered. A download link for the corresponding lesson plan(s) will be available.

Region/Area/National Events

All of the same setup and controls exist for creating events at the Area, Region, and National level with regards to setup and activity selection. The same set of tabs also exist on the 'Manage Event' page once the event has been created. (*an Area event will be used in the examples below.)

Differences will occur, however, depending on the Troops invited and whether or not they intend to attend the event. At the Troop level, a new section is present under the Calendar section of the main Dashboard for any 'Area/Regional/National Events Requiring Response.' Events which the Troop has been invited to are listed, and Troop leaders with Manage Calendar permissions can click to access/manage the event.

🗓 Calendar	
Events I'm attending	
● Test meeting	10/28/21 7:00 PM
Area/Regional/National Events Requiring Response	
● Area 2 Campout	10/15/21 5:00 PM
● NCR Train the Trainer	11/05/21 5:00 PM
Manage Area Event Subscriptions	

Click the Event name itself, or the "Manage Area Event Subscriptions" link (and then click the Event name.) If a Troop decides they will be joining the Area event, one of the Troop leaders will need to indicate this by clicking the "Join event as Troop" button. (Or "Decline" if they will not be participating.) If the Troop joins, the Event will shift over to the list of Upcoming Events and also appear on the Troop calendar. If the Troop declines, the event will be removed from the list and also will not appear on the Troop Calendar.

⛺ Area 2 Campout

Event Info

Start Date: **10/15/2021 5:00 PM**
End Date: **10/16/2021 5:00 PM**
Type: **Campout**
Venue name: **Northern Campground**
Venue address:
7578 Valley Rd
Columbus, OH 43031

✖ Non-member guests allowed
✔ Medical form required ⬇ ⬇
✖ Uniform required
1 Total nights tent camping
4 Hiking miles

[📅 Join event as Troop]
[📅 Decline event participation as Troop]

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At the Area level, when the event is initially created, there may be no one yet listed on the 'Event Overview' tab until a Troop indicates their intent to join the event. (Other Area Leaders would appear, if invited.)

After a Troop clicks the "Join" button, they are then listed and the attendee statistics begin to populate.

The Troop, then, will handle their own reporting of RSVPs and those will also be reflected at the Area level. (*The 'Overview' tab for the Area will only show invited totals for Troops. Specific Troop responses will not be recorded on the 'Overview' tab, but specific participants *will* be listed on the 'Event Participants' tab.)

Other Considerations/Differences

With an Area, Region, or National event there are a few other differences to note between the main Event that was created at the upper level and the Event as it appears for the Troop.

- *Event Setup* – all of the details within the event setup are controlled at the upper level where the event was created, with one exception. A Troop can access the 'Event Setup' tab to view all of the information but cannot make edits or changes to the setup. The Troop *can*, however, enter their own information in the fields for departure and return dates/locations (as this will differ from Troop-to-Troop.)
- *Required Forms* – the 'Required Forms' tab will have slight differences between the upper level and the Troop. The Area/Region/Home Office location where the event was created will have a set of event forms to complete. Each Troop that joins the event will have their own, separate set of forms to complete. This tab will reflect the necessary forms at the appropriate level.
- *Event Participants* – At the Troop level, the 'Event Participants' tab will only show members who are part of that Troop. At the upper level, where the event was created, the comprehensive list of attendees will be reflected. An extra column is included for displaying the corresponding Troop of the participants.
- *Activity Plans* – The Area leader may have specified activities to use, which will be reflected at the Troop level. The Troop may also add their own, additional activity plans if they intend to cover something different from, or in addition to, what is already planned.