**Unit Visit Tracking System Help**

## Overview

This system will allow unit commissioners to track information about visits to their units. All commissioners may access the system; unit commissioners can add and edit visit information, and they can see their most recent five visits on the Home page with a link to each visit. Unit commissioners can add visit information only to the units to which they are assigned. District commissioners can view the visits made by their unit commissioners. Visit information is stored in the system for one year.

## Visits

Click the Visits tab. District commissioners can view visit information on this page. Unit commissioners can view and edit the information. Commissioners will see those visits assigned to their commissioner position; for example district commissioners can view visit information for the district assigned to them. Unit commissioners can view the information for the units assigned to them.

### To view visits

Visit details included on this page are visit date, attendees, type of visit, unit, and district, plus up to five quality program indicators, including Planning, Program, Leadership, Tone, and Attendance.

### To view a definition of each indicator

Click the Quality Indicators link. The resulting information appears in a new window.

Quality indicators are observational points used to measure not only the quality of visits, but also the level of engagement. They are:

| | |
|---|---|
| Planning | Did the observed program reflect prior planning and adequate preparation? |
| Program | Was the observed activity appropriate to the stated advancement and program objectives for this unit? |
| Leadership | Was adult (and age-appropriate youth) leadership present during this activity? |
| Tone | Did the Scouts appear to enjoy and be engaged with the program activity? |
| Attendance | Was actual attendance at this activity at or near the number of enrolled youth? |

## Filter

You can limit the visits that display by filtering the information. To do this, click the filter icon . On the resulting view, click the down arrow by the structure that you want to filter. For example, to view visits within a council, click the down arrow and select the district to view.

**Note**: These selections are based on your role. For example, if you are a district commissioner, you can select from the district assigned to you in the District filter. Then you could also narrow the results to specific units. Other options may not be available to you. You can view ONLY items within your role structure.

You can also narrow the search by selecting visit dates from the calendar. Select a from and to date to see visits within a date range.

Select your filters and click Submit. Scroll down the page to view the visits within the filters you have set.

**To add a visit**
Adding a visit involves three steps, which correspond to the three tabs on this view: Visit, Quality Indicators, and Comments. Note: You can also add a visit from the Home page.

**1** Click the Add Visit button.
**2** Some of the information may be automatically filled in, depending on your role. If you are a unit commissioner, the region, area, council, and district are completed. You must select a unit from those assigned to you.
**3** Click the down arrow at the Visit Type field and select from the types listed.
**4** Enter a description of the visit. This field is optional but may be useful.
**5** From the calendar icon, select the date of the visit.
**6** Enter the number of youth and the number of adults present at the visit.
* Youth and adults present are validated against Scouting guidelines. If no one was present, enter a zero rather than skipping these fields.

| **If...** | **Then...** |
|---|---|
| The visit type is unit activity or unit meeting, | both youth and adults can be entered. |
| The visit type is a leader meeting, | the adults can be entered and youth default to zero. |
| The visit type is other, | if you omit youth and adult fields, the default will be zero. |

**7** Click Save
**8** Select the Quality Indicators tab. For each quality indicator, select Yes or No. Then Save your entries.
**9** Select the Comments tab. Select one of the radio buttons to make this comment specific to the visit, the unit, or simply a general comment. Type up to 255 characters for your comment in the free-form field and click Save.

**To edit visit details**
On the Visits page, click on the visit date of the visit you want to edit. The Edit Visit page opens. Make any changes and click Save. You can make changes to the Quality Indicator and Comments views as well. To delete a comment, click the red X in the Delete column of the comment. You must save the Add Visit page and then each page that you change before you can continue.

**To view most recent visits**
Unit commissioners will see the last five visits they have made on the Home page in the left panel, and they will see all visit reports for the past 12 months on the Visits page. Click on the date to view and/or edit details of the visit. Click on Visits to view all visits on the Visits page.

**To print visit information**

Click the printer icon. If your role allows you to view information above a unit level, you can select from the structure options available. For example, select a district to print unit visit information for units only within that district. Or, make no selections to print all visits. The report opens in Acrobat Reader format. Click the printer icon to print it.

Note: Comments themselves are not printed. A yes or no is printed in the Comment column to signify that comments were entered.

**To export visit information**

Click the export icon. A window shows visit options and a check box for each. This is supplemental information that you can export. Visit date, visit type, visit description, and unit type/number will automatically be included in the spreadsheet. Mark the check box for the supplemental options that you want to export. Click Submit. Then select to either open or save the spreadsheet.

Note: Only the most recent comment in each type of comment is exported.

**Focus**

A focus point is a note to self. It's a reminder task for the commissioner. Any commissioner can add, edit, or delete a focus they created.

**To set a focus:**
**1** Click the Add a focus button. This button is on the Home page and on the Focus page.
**2** Click the calendar icon to select a From Date, or starting point, for this task.
**3** Click the calendar icon to select a To Date, or ending point, for this task.
**4** Type text in the Focus area to describe the task. Type up to 255 characters.
**5** Click Save.

**To view focus items:**
Click the Focus tab. You will see only your focus items. You can edit or delete an item using the appropriate buttons on the left.

On the Home page, the five most recent focus entries are displayed with a link to the Focus page.