

Application handling

This article is intended for administrators.

It explains the procedure of membership application using the Servas Online (SI) website (servas.org) from the moment the user initiates an application request for your country until the application is either approved or rejected.

It will also instruct how to monitor the progress of each membership application.

Note: Applicants who apply by other means should be instructed to use this process. Refer them to the User Help - **Getting Started with ServasOnline** section.

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Questions and requests can be sent to servasonline@servas.org

Reminder: Your screen may look different from the figures shown here; the view may vary, depending on the device you use (e.g. computer, laptop, phone) or your browser (e.g. Chrome, Safari, etc.).

1. Membership application process

1.1. Notification of new membership application

Country representative receives an email indicating that a user has applied for membership in their country. This message will include the information provided by the applicant using the online request form within ServasOnline (refer to User Help - **Getting Started with ServasOnline**).

Since the applicant will receive an automatically generated email indicating that a representative from their country will contact them, it is **very important** to respond to these emails in a timely manner.

The message will be sent to an address defined by the administrator in your country.

Refer to **Customising the application process – Address for automatic notification of new membership application**.

Note: Some countries have requested that the applicant be directed to the country’s website for an offline form. In this case, the user will not be requested to complete the online request and the automatic notification will not be received. The application process will usually be initiated by the applicant sending the completed offline form to the administrator in their own country.

1.2. Completing request information

This initial contact with the applicant, by phone or email, should include a short introduction to Servas. Once the applicant indicates that they want to continue with the process and become members of Servas, inform the applicant what additional information is required in order to process their membership application and how to provide it. The applicant can be directed to the user online help and/or the country’s website for more information about the application process.

1.3. Interview

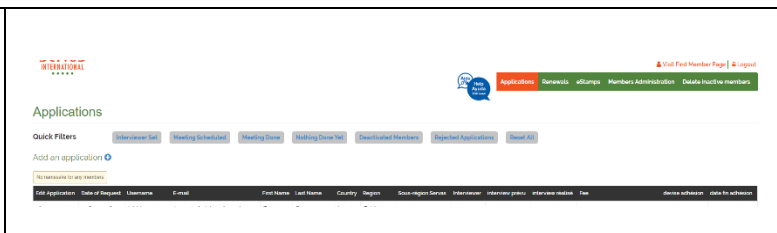
Once all the required information is received, the names of interviewers should be provided to the applicant. The applicant and the interviewer coordinate a date and place for the interview. The interview is conducted based on country-specific procedures and a decision is made whether to accept the applicant as a member of Servas.

1.4. Membership approval within Servas Online

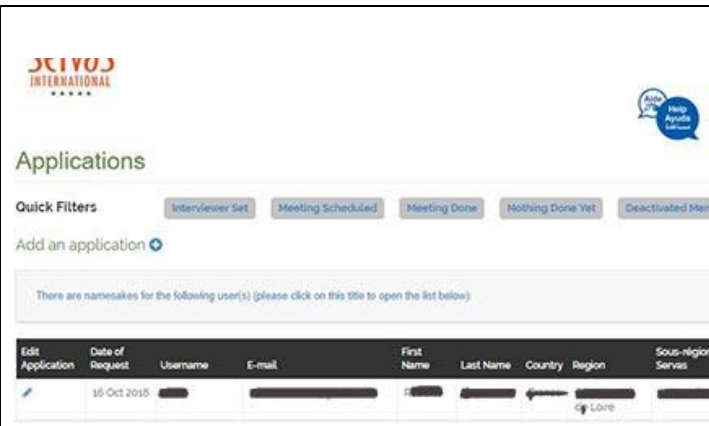
Once the application is approved, the member’s profile is immediately visible to all registered members in Servas Online regardless of whether the member has set a password or logged in.

Note: Some countries have decided that the application will not appear in the list automatically and will have to be added manually (see step 2-4 below) before it can be approved. This option is useful to ensure that only valid applications are listed.

1. Login as an administrator, click the **Visit Admin Page** option and select the red **[Applications]** button.



2. If the application was not automatically listed, add the application manually. Click the + sign (white on blue background) to the right of the **Add an application** heading (located just below the Quick Filters heading).



3. Complete the fields within the form. (see full details below)
4. Click **[Add Member]**.

Username - must be unique, with no spaces or accented characters.

Once the application is added, the name can be changed only by the regional or national coordinator.

Email Address - must be unique. If the email address is incorrectly spelled, you will have to reject the applicant and fill out the form again. Some countries have decided that the application is per household rather than per member. In this the case, only one email is required for all members of the household.

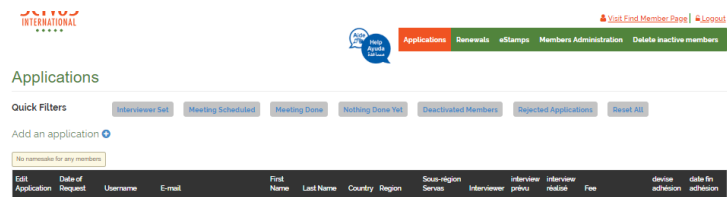
First Name / Last Name – some countries have decided that the application is per household rather than per member. If this is the case, these fields can include the names of both members living within the same household.

Country - Choose the country in which the members plans to be a member (not the country they are travelling to)

State/Region, Sub-region – these are country-specific

Phone – this is not mandatory at this stage and can be added later. It must include the country code – e.g. +44 for Britain, but it's useful if the email is not correct.

- The membership applications are listed in a table.
- Find the relevant application, scrolling to find additional applications. Alternately, you can select any of the **Quick Filters** above the list.



- Click the **Edit Application** pencil icon at the left end of the relevant member application.

No namesake for any members

Edit Application	Date of Request	E-mail	First Name	Last Name	Country	Region	Sub-region	Servas	Interviewer	Schedule Meeting	Actual Meeting	Member Currency	Member Fee	Member Date	Member Expiration
	29 Mar 2017	ig@hotmail.com	Tove		Denmark	Sjælland									
	26 Mar 2017	rg@gmail.com	Ulla		Denmark	Hovedstaden									
	26 Mar 2017	id@gmail.com	Karen		Denmark	Midtjylland									
	15 Mar 2017	agastor@a	Achim		Denmark	Syddanmark									

- Add information missing in the **Edit Application** form (see full details below)
- Select one or more of the following values for **Role**
 - Traveller** - will create an **LOI** section in the member profile
 - Host** - will create a **Hosting** section in the member profile
 - Day Host Only** - will create a **Day Hosting** section in the member profile
- Select **Admitted** or **Rejected**, as relevant.
If it's **Rejected**, all the information will be deleted
- Click **[Save]**.

Form fields for editing an application:

- First Name:
- Last Name:
- Email:
- Phone number:
- Country:
- State/Region:
- Sub-region:
- Interviewer:
- Schedule Meeting:
- Actual Meeting:
- Membership Fee:
- Membership Currency:
- Membership Expiration Date:
- Role: Day Host Only Host Traveller
- User Notes:
- Admitted Rejected
-

A message is sent to the member allowing her/him to set a password and access ServasOnline. This is described within the **Getting started with Servas Online** chapter of the user online help.

Note: *some of the fields might not be relevant for all countries (e.g. there might be no fees).*

Add an application form fields – most of these fields could be edited within this form, except Username and email. The member can update them him/herself within their profile. Alternately, you can edit them later.

(this can be done within the **Members Administration** screen using the **Complete Profile** option).

Interviewer – can be selected from the list provided by your country.

Membership Fee and **Membership Currency** - To find your currency, type the first letter of the official currency name several times until you see the correct currency.

e.g. Canadian dollar=CAD, Euro=EUR, British Pound =GBP.

Membership Expiration Date - Follow your country's policy for defining this.

Role - If the role **Traveller** is assigned, the **Letter of Introduction** section will appear in the member's profile. If the role **Host** is assigned, the **Hosting** section will appear in the member's profile. If a **Day Host Only** role is assigned, the **Day Hosting** section will appear in the member's profile.

If the member is neither host nor traveller and nor Day Host Only, the "supporter" role is assigned.

You can define a member as a traveller even if they do not have a valid LOI.

Note: In some countries, a member can be given the role of a traveller, without having authorization to travel internationally. This allows them to receive information from Servas International and country organizations, find and communicate with others, and have an LOI for travel in own country

1.5. Completing the profile

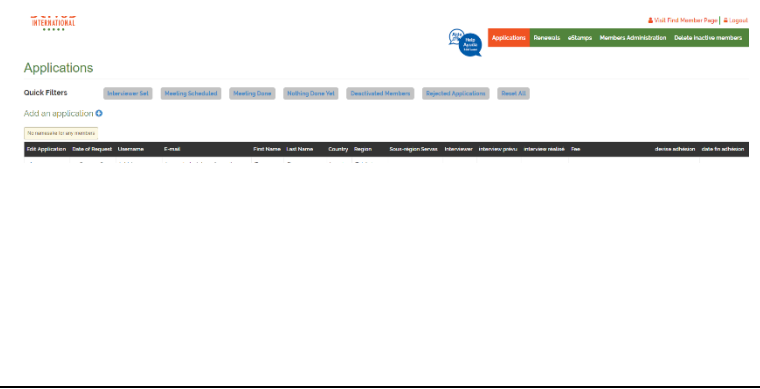
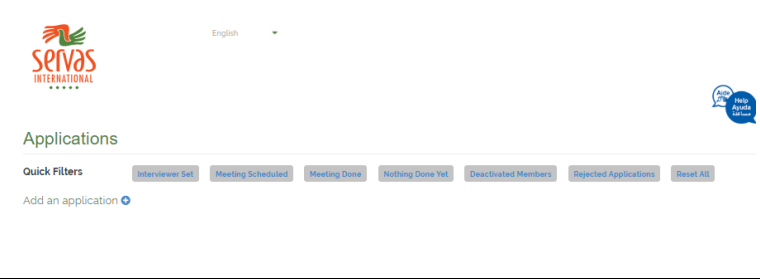
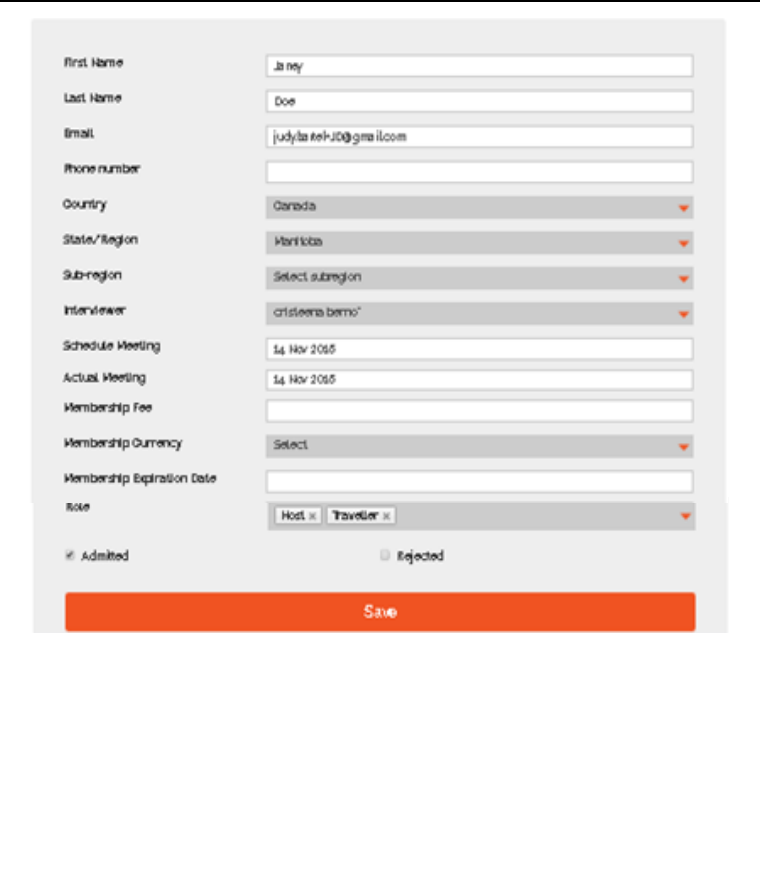
The new member will be notified that the membership has been approved. They will be instructed to create a password and complete their profile (see User help - **Editing My Profile**)

In case they cannot do this themselves, you may need to complete the member profile for them.

Refer to the Admin help - **Members Administration** for details on **Editing the member profile**.

2. Monitoring the status of applications

The E-mail address to be used for contact is listed within the application request.

<ol style="list-style-type: none"> 12. Select the red [Applications] button to view the list of applications for membership. 13. Scrolling can be used to view additional applications. 14. If some of the applications are not listed, click [Reset All] 	
<ol style="list-style-type: none"> 1. Click on any of the Quick Filters buttons in order to view only applications of the related status. 2. Click [Reset All] to show all applications once again. 	
<ol style="list-style-type: none"> 3. The Application form could be update with the Interviewer name, the Schedule meeting and/or the Actual Meeting then [Save] 4. You can monitor the progress of each application using the Date of Request, Interviewer, Schedule Meeting and Actual Meeting fields. 5. If too long a time has elapsed, inquire why the process has not been completed. 6. You might need to use Edit Application to update or add missing information if the process has proceeded without this progress being documented within the ServasOnline application (e.g. interviewer). 	

Customizing the application process

Each country can customize the way ServasOnline handles the requests for membership. This must be coordinated with the Servas Online administrators (servasonline@servas.org)

Note: the default setting for the below be used for your country, unless coordinated otherwise.

2.1. Application process automation level

Select one of three different paths. Unless coordinated otherwise, the default automated process will be used.

- **Fully automated process** - all aspects of the application process are handled via ServasOnline. This begins with the applicant initiating a request, continues with an online membership request form, with the request automatically listed within the Applications page until the application process is completed by the applicant being accepted for membership (the application disappears from the application list and the member profile is accessible from the Members Administration list).
- **Manually adding the application request initiated using the online membership request form** *The Applicant form is sent only to the Administrator and not stored in servas.org (Default)* - the process is as above, but the request is not listed automatically. The administrator adds the application request to the list once membership is approved. This avoids overloading the list with random requests which are not followed through by the applicant.
- **Manually adding the application request initiated using an offline membership request form** - With this option the offline country-specific form continues to be used. The first contact for these countries forwards the applicant to the country website for full instructions on the application process, including the offline form. The administrator manually adds the request to the list and the rest of the process is done via ServasOnline. This is useful where the request is required in a local language that is not supported by Servas online.

2.2. Address for automatic notification of new membership application

Unless coordinated otherwise, the online application request forms are used and are automatically sent to the default address for your country (see below).

- **Default address** - country@servas.org
(country name is in English, for example canada@servas.org)
- **Other address** – The administrator for your country can decide whether a single country-wide address is to be used or multiple regional-specific addresses.
- **No automated request** - Some countries have requested not to use the online request form. The applicant will be directed to the country's website for an offline form. In this case, the user will not be requested to complete the online request and this automatic notification will not be received. The contact will usually be initiated by the applicant sending the completed offline form to the administrator in their own country or contacting them using the default email address (see above). The application within Servas online will be initiated manually by an administrator once the applicant is approved as a member.