

### Participant Screening Best Practices

The Hiking/Backpacking Committee asks that leaders (which encompasses co-leaders for the purposes of this document) follow these best practices when screening participants for their trips.

#### REGI participant status

1. By the time that a trip is supposed to take place, there should be no "submitted" statuses on REGI and everyone should be screened. Use the REGI statuses as follows:

<b>Submitted</b>	leader has not yet reached out to participant
<b>Pend action</b>	leader is not ready to approve or deny participant for trip because something is outstanding. For example, use this designation when: (a) you have called or emailed participant to screen them but you have not yet been able to reach them, (b) you are awaiting payment for the trip, or (c) you are waiting to see how the participant did on another scheduled hike. <u>It must be clear to the participant what action they must take.</u>
<b>Wait list</b>	everyone with this status should have been <u>screened</u> and be interested in joining the hike if a spot becomes available.
<b>Trip not a fit</b>	leader screens participant and determines that the trip is not a good fit for the participant based on the participant's objectives for the trip, level of experience or ability (either too much or too little) or lack of required gear.
<b>Canceled</b>	use this status when (a) participant cancels <u>before</u> the trip takes place, even if it's last minute, or (b) someone on the waitlist informs you that they will not be able to make it onto the trip.
<b>No-show</b>	participant does not cancel before the trip takes place and does not show up at the trailhead.

#### Timelines

1. Once a participant has submitted a request to join the trip, a leader should, if possible, reach out to screen the participant within 1 week (ideally this timeframe is within 72 hours).
2. If the trip is over-subscribed, and you have your maximum number of participants approved on the hike and a waiting list, send an email to everyone to say that this is the group approved for the hike and to please let you know as soon as possible if they can no longer make the trip so that you can offer their spot to someone else on the waitlist. Send second email if the first is far away from the trip date and you have a long waitlist.
3. 4-7 days prior to trip, send out information sheet to all participants, co-leaders, and leaders. Remember that the information sheet needs to be sent to any last-minute participants added to the trip!
4. Send participants a mountain forecast weather report 3 days and 1 day before the hike so they can prepare properly. Also warn of any possible cancellations.

Other best practices:

1. Write down the date(s) you communicate or attempt to communicate with participants in the “notes” section on REGI. This helps ensure that all leaders are on the same page regarding the screening status of each participant.
2. If you are collecting a trip fee, be clear to the participant how they will know whether they are confirmed on the trip (email confirmation, status changed to “approved,” etc.). Note the date and amount received in the notes section of REGI. Likewise, if you need to issue refunds, add notes when the refund goes out.
3. If you have no more spots available on your trip, be sure to communicate to the participant that is going on the waitlist that (a) they are being put on the waitlist, (b) when they might expect to hear from you regarding whether they can make it onto the trip, and (c) to reach out to you if they are no longer able to make it onto the trip.
4. On REGI under “event info” the default “confirmation page” message is “Thank you for registering. An event leader will be in contact with you soon regarding your participation in this event.” Change the message to be more specific if you can! For example, “Thank you for registering. An event leader should be in contact with you within 72 hours regarding your participation in this event.”
5. After a hike, make a note in the comment section of REGI about a participant’s performance in case a leader reaches out to you about that participant in the future.

Hike status:

The status of your hike should evolve on REGI and outdoors.org / the activities database depending on how many people have submitted to be on your hike and how many you have accepted. Note that only the person that created the trip on the activities database will be able to change the status on the activities database. Use the hike statuses as follows:

<b>Open</b>	use if there is space for new participants on the hike.
<b>Wait list</b>	use if you know that any new participant that requests to be on your hike cannot be offered a spot on your trip at this time once screened.
<b>Full</b>	use if you are no longer accepting new participants on your hike and if you have a long enough waitlist. Participants will not be able to sign up for the hike with this designation.
<b>Closed</b>	Change the status of the hike to “closed” post trip once you have submitted: (a) the trip waiver, and (b) the trip report.
<b>Canceled</b>	Use if the hike is canceled and does not take place.

Appendix

When you change the status of a participant on REGI an email with the following language will be sent to the participant:

<p><b>Enrolled</b></p>	<p>Congratulations!          You have been APPROVED to participate in the following event: <i>[event name]</i></p> <p>Please click the link below to view additional information about the event, including the meeting place, the meeting time, and the carpooling/contact information for all approved participants: <i>[link]</i></p> <p>CARPOOL</p> <p>Carpooling is good for the environment, and a great way to get to know people. We encourage you to contact other participants and find ways to share transportation. You can update your carpool information and view the carpool information for other participants by going to the REGI page for that event: <i>[link]</i></p> <p>Please contact the Event leader if you have any questions.</p>
<p><b>Submitted, Pend action &amp; Trip not a fit</b></p>	<p>Your registration status has been updated to <i>[SUBMITTED/PEND ACTION/TRIP NOT A FIT]</i> for the following event: <i>[event name]</i></p> <p>You may view the REGI page for this event at <i>[link]</i></p> <p>Please contact the program leader if you have any questions</p>
<p><b>Wait list</b></p>	<p>You are on the WAIT LIST for the following event: <i>[event name]</i></p> <p>If a spot becomes available, you will be notified.</p> <p>You may view the REGI page for this event at <i>[link]</i></p> <p>Please contact the program leader if you have any questions.</p>
<p><b>Canceled</b></p>	<p>You are no longer registered for the following event: <i>[event name]</i>. If you believe this is a mistake, please contact the event leader.</p> <p>You may view the REGI page for this event at <i>[link]</i></p>