

NEW MEMBER PORTAL

Portal Roles Reference Guide

Primary Club Admin • Senior Club Admin • Club Admin

Summary

PRIMARY CLUB ADMIN	SENIOR CLUB ADMIN	CLUB ADMIN
Highest club administration role All linked venues in the club group Can assign Primary Club Admin	Senior administration role with compliance access All linked venues in the club group Can assign Senior Club Admin	Administration for one club or venue The directly linked club or venue Can assign Club Admin

1. Role hierarchy and definitions

Role	Best suited to	Portal scope	Role they can assign
Primary Club Admin	The club's main nominated administrator such as a CEO, or EA for another trusted person managing club administration.	All venues or entities available within the linked club venues.	Lower roles
Senior Club Admin	A senior administrator who needs broad staff, education and compliance access across the linked hierarchy.	All venues or entities available within the linked club hierarchy.	Lower roles
Club Admin	An administrator who manages a single club or venue.	The club or venue is connected through the user's direct relationship.	Lower roles

Note:

Direct relationship controls access

Primary Club Admin and Senior Club Admin can then use the available venue switching functionality for linked entities in the hierarchy.

2. Shared administration capabilities

The three admin roles are intended to support the core administration journey in the new portal. The exact result depends on the user's role and scope. The capabilities are:

- Manage staff records, including adding, viewing, editing, deactivating, and reactivating staff.
- View and update eligible entity details.
- Allocate users to education products, register users for courses, and view registration details.
- View products and purchase eligible products or additional allocations.
- View invoices and ability to pay outstanding invoices.
- View renewal notices, agree to terms and conditions, and complete eligible renewal payments.
- View registration details for all users within the group. If someone transfers from another club, the registering details will be transferred over.

3. Role details

Primary Club Admin | Highest administration level

Purpose	The main nominated administrator for the club. This role is intended for a trusted person responsible for broad administration, enrolments, renewals and access across the club group.
Scope	All linked venues or entities available within the club group. The default experience should support viewing all available venues, with the option to switch when required.
Can assign	Can nominate or assign another Primary Club Admin, subject to the portal's role-assignment controls.

Key capabilities

- Full staff management access across the whole organisation.
- Can manage enrolments, purchases, invoices and renewals for eligible entities.
- Can maintain their own profile and the details of staff members.

Senior Club Admin | Senior administration plus compliance

Purpose	A senior administrator with broad administrative access and access to the compliance module, but below the Primary Club Admin in the hierarchy.
Scope	All linked venues or entities available within the club group. The default experience has the capability to view all available venues, with venue switching when required.
Can assign	Can nominate or assign another Senior Club Admin through the permitted role-selection process.

Key capabilities

- Broad staff management access across the group.
- Can manage enrolments, purchases, invoices and renewals for eligible entities.
- Can maintain their own profile and preferences.
- Coming soon post-launch: Each venue can review their compliance audit check, compliance reports, non-compliant items and audit history where available.

Club Admin | Single club or venue administration

Purpose	An administrator nominated to manage one club. This role provides the administration tools needed for that direct entity without group-wide access.
Scope	The scope of this role is limited to the one club.
Can assign	Can nominate or assign another Club Admin where the portal

allows for role assignment.

Key capabilities

- Can manage staff for the directly linked club or venue.
- Can manage enrolments, purchases, invoices and renewals for the directly linked entity where eligible.
- Does not receive hierarchy-wide access simply because the person has another relationship elsewhere.
- Can maintain their own profile and preferences.

4. Role-selection and display rules

When adding or editing a person

- If Seniority = Staff, the Portal Roles field should not be displayed.
- If Seniority = Board, the administrator can select one or more applicable portal roles before saving. The person saved should appear in the Directors section.
- For non-staff seniority levels, it will only show the role options the logged-in administrator is allowed to assign.
- The selected role must be saved against the correct direct entity relationship.

When switching or transferring a person between venues

- Primary Club Admin and Senior Club Admin may work across linked entities using the available hierarchy and venue switching controls.
- When the entity changes, the staff member's club will be the selected entity.
- If the person's Seniority = Staff, the role drop-down will remain hidden during the transfer of entity-change process.
- A role held on another non-direct relationship won't elevate the person's portal access.

When viewing a staff member

- If the staff member's Seniority = Staff, it will not display the "Role Assigned" label or portal-role information.
- Users won't be able to increase their own access outside of the permitted role-assignment process.

5. Access matrix summary

Capability	Primary Club Admin	Senior Club Admin	Club Admin
Manage staff	✓	✓	✓
View/edit eligible entity details	✓	✓	✓
Education enrolments and products	✓	✓	✓
Invoices and payments	✓	✓	✓
Renewal administration	✓	✓	✓
Compliance module / reports	✓	✓	Role/configuration dependent