



F05 CONFIGURED SUPPORTING DOCUMENT

Visitor Registration Form

A controlled, editable working derivative for M-T1-CP-01-SD-05.
Complete local facts, approvals and operational evidence before
use.

Release truth. This file is configured for substantive review. It is not approved for public distribution or operational use. Local law, insurance, safeguarding, accessibility, privacy, brand, rights and accountable-owner checks remain mandatory.

Release control

Field	Controlled value
Status	REVIEW — configured derivative; privacy and system approval required before collection
Supporting-document code	M-T1-CP-01-SD-05
Exact derivative title	Visitor Registration Form
Source initiative	M-T1-CP-01 - Community Open Day
Source initiative code	M-T1-CP-01
Source initiative title	Community Open Day
Initiative disposition	Canonical retained
Canonical parent	M-T1-CP-01 - Community Open Day
Canonical parent code and title	M-T1-CP-01 - Community Open Day
Named overlay or migration label	Canonical body
Redirect or tombstone route	None
Family master	Playbook_F05_Registration_Contact_Tracking_Master.md
Family / master version	F05 / 1.0
Recorded master SHA-256	1d4fc47ca320db79141cefabddea504db96e871c731ad7e210086b0e0680a5cd
Authoritative index	Playbook_Supporting_Documents_Master_Index.md v1.1
Configured master variant	Section 18 — M-T1-CP-01-SD-05 Visitor Registration Form overlay
Derivative version	v0.1

Adaptation note

Use for Community Open Day pre-registration, door registration, assisted registration and project-station enquiries. Collect only what is needed to register or complete the visitor's chosen follow-up. Provide a visible welcome route for visitors who decline to register. Keep access and dietary arrangements in a restricted operational list, reconcile attendance separately from registration and assign each project enquiry to a named ambassador with a two-business-day response target.

Instructions

1. Complete the privacy-and-purpose gate before building a form, QR route, paper copy or integration.
2. Approve one minimum field set for each capture route; do not make optional follow-up fields compulsory for entry to an open event.
3. Display the short collection notice at the point of collection. Do not rely on a hidden link alone.
4. Keep intake, action and consent/preference records logically separate, linked by stable identifiers.
5. Use a restricted list for access, communication and dietary arrangements. Do not copy those details into a general contact list.
6. Provide accessible digital, private paper and assisted routes. Never use a public sign-up list that exposes earlier entries.
7. Do not collect postal address, date of birth, occupation, employer, household details, detailed health information or a bundled general-contact permission.
8. Close event-only records after follow-up and the approved retention review; retain optional future choices only in the authorised system.

Controlled configuration fields

Field	Completion instruction	Evidence
{{ACCOUNTABLE_ENTITY}}	Enter the club or District unit responsible for collection and follow-up.	Initiative approval
{{EVENT_NAME}}	Enter the approved Community Open Day public title.	Event brief
{{SPECIFIC_PURPOSE}}	State the exact registration and requested-follow-up purpose.	Privacy-and-purpose gate
{{PROJECT_CHOICES}}	Insert a short current list of approved projects/topics.	Event program
{{SOURCE_CODE}}	Enter the pre-registration, door, assisted or project-station source code.	Source-code register

Field	Completion instruction	Evidence
{{NOTICE_VERSION}}	Enter the approved collection-notice version shown with this form.	Notice-control record
{{PRIVACY_URL}}	Enter the approved privacy-information route.	Privacy review
{{PRIVACY_CONTACT}}	Enter the monitored route for access, correction, withdrawal or concerns.	Contact ownership record
{{RESPONSE_OWNER}}	Enter the owner who validates and routes new records.	Workflow approval
{{PROJECT_RESPONSE_TARGET}}	Enter the approved target; default overlay target is two business days.	Service-level approval
{{RETENTION_TRIGGER}}	Enter the approved event-record review/deletion or de-identification trigger.	Retention schedule

Controlled public fields

Public field	Required only when	Optional / exclusion rule	Authorised use
Preferred name	A named registration or personal follow-up is required	Permit anonymous attendance where the approved event plan allows it	Confirmation and reconciliation
Attendance response	Capacity or confirmation is managed	Exclude for a project-station enquiry unrelated to attendance	Event administration
Booking quantity	Group bookings are permitted and capacity needs it	Exclude for individual/open attendance	Capacity planning
Preferred contact route and matching detail	Confirmation or follow-up is requested	Do not ask for multiple channels by default	Requested response only
Project or topic interest	A visitor requests a project-specific next step	Use the approved short list; avoid broad profiling	Route to named ambassador
Access, communication or dietary arrangement	The visitor chooses to request an arrangement	Ask for the arrangement, not diagnosis; restrict access	Event delivery only
Event follow-up choice	The visitor wants contact about this Open Day request	Keep separate from future updates and membership	Current event/request
Future service-opportunity choice	Optional updates are genuinely offered	Unselected by default; record wording, date, method and channel	Chosen future scope only
Membership-information choice	The visitor separately asks to learn more	Unselected by default; not a condition of attendance	Requested membership information only
Notice acknowledgement and date	Personal information is collected	Record the exact notice version	Evidence of notice shown

Configured visitor registration form

{{EVENT_NAME}}

Supporting-document code: M-T1-CP-01-SD-05 **Source:** {{SOURCE_CODE}} **Collection notice:** {{NOTICE_VERSION}}

How we will use your information

{{ACCOUNTABLE_ENTITY}} is collecting the information you choose to provide so we can {{SPECIFIC_PURPOSE}} and complete the follow-up you request. Required fields are identified; other fields are optional. Optional future service updates and membership information are separate choices. Privacy information is available at {{PRIVACY_URL}}. To ask about your information, correct it, change a preference or raise a concern, contact {{PRIVACY_CONTACT}}.

You are welcome to attend the Open Day without joining an optional future-contact list. Ask the event team about the approved no-registration route if you prefer not to provide details.

Your visit

Preferred name: _____

Attendance response:

- ☐ Attending
- ☐ Interested; please contact me
- ☐ Unable to attend
- ☐ Project-station enquiry only

Number in booking, if group booking is available: _____

Which current projects or topics interest you? {{PROJECT_CHOICES}}

How we can respond

Choose one preferred contact route only if you want confirmation or follow-up:

- ☐ Email: _____
- ☐ Mobile/SMS: _____
- ☐ Telephone call: _____
- ☐ No follow-up needed

Optional access, communication or dietary arrangement needed for this event:

Please describe the arrangement that would help; a diagnosis is not requested. This response is restricted to authorised event staff.

Contact choices

- ☐ Contact me about this Open Day registration or the project enquiry selected above.
- ☐ I would also like occasional updates about future Rotary service opportunities relevant to my selected interests.
- ☐ I would also like information about visiting or learning more about Rotary membership.

Preferred optional-update channel: Email / SMS / Telephone / None

Acknowledgement: I have read or had explained the collection notice shown above. Participant confirmation:

Date: _____

Internal action record

Intake ID	Source	Attendance status	Project/topic	Contact scope	Restricted arrangement indicator	Owner	Next action	Due date	Status
	{{SOURCE_CODE}}				Yes / No — no details here	{{RESPONSE_OWNER}}		{{PROJECT_RESPONSE_TARGET}}	New

Store the arrangement details only in the restricted operational list. Reconcile registration, attendance, no-show and walk-in status without erasing the intake history.

Workflow and release checklist

- ☐ Privacy review outcome, applicable local requirements and evidence location are recorded.
- ☐ Every public field has a purpose, required/optional state, authorised user and retention treatment.
- ☐ Digital, paper and assisted versions show the same approved notice and version.
- ☐ The event offers an approved welcome route for visitors who decline registration.
- ☐ Source codes distinguish pre-registration, door, assisted and project-station capture.
- ☐ Contact choices are separate, unselected and accurately stored with wording version/date/method.
- ☐ Access and dietary details are restricted and absent from the general contact record.
- ☐ Project ambassadors, two-business-day targets and overdue escalation are operational.
- ☐ Attendance is reconciled separately from registration.
- ☐ Test records pass confirmation, correction, withdrawal, suppression and close-out routes.
- ☐ Paper custody count, transfer owner and working-copy disposal are assigned.
- ☐ {{RETENTION_TRIGGER}} is configured and event-only records do not persist by default.

Review record

Review domain	Reviewer	Outcome / required change	Date
Initiative and event operations			
Privacy and purpose			
Accessibility and assisted capture			
System, security and retention			
Follow-up and source tracking			
Final approval			