



Online Registration

UNIT GUIDEBOOK

August, 2020

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ONLINE REGISTRATION OVERVIEW

The online registration system is designed to make it easy for families to join Scouting. They can find a unit, if they do not already have one in mind, or apply to the unit of their choice. The system walks them through the entire application and payment process. If there is an application or lead to be processed, the unit Key 3 will receive an email Summary Report twice a week to notify them to take action.

WHAT DOES THE REGISTRATION TOOL DO?

There are three parts to the tool:

1. Invitation Manager:
 - Collects information from potential new Scouts for your unit from BeAScout;
 - Helps you manage leads from joining nights and from individual referrals; and
 - Allows you to send invitations directly to interested families with a link to the application that is specific to your unit.
2. Digital Application: *
 - Electronic application that collects all the data needed to register in a unit;
 - Allows the applicant (if over 18) or the applicant's parent to provide a digital signature; and
 - Includes credit card payment of national and council fees.
3. The Application Manager:
 - Collects completed applications from new youth and adults or those with current registrations who are registering as multiple in another unit for the first time; *
 - Allows the unit leader/Key 3 to review the youth application and either accept the application with an electronic signature or send the application to the district so that they can place the youth in a different unit;
 - Allows the Committee Chair to review the adult application and make recommendations for adult positions; and
 - Allows the Chartered Organization Representative (COR) or their designee to review and accept or reject the application with their electronic signature or refer the application to the district for placement in a different unit.

- * **Youth and adults who use this system should be new to Scouting or be currently registered in a unit and applying to multiple in a different unit than the one in which they are currently registered. This system is not designed to register position changes in the same unit, transfers, or youth or adult renewals.**

Both the Invitation Manager and Application Manager are accessed through your [My.Scouting](#) account.

HOW CAN ONLINE REGISTRATION HELP ME RECRUIT?

Your unit committee, leaders, parents and youth in your unit are the best “sales force” for Scouting. They know the program that the unit provides and other parents and youth who are not in Scouting. However, research shows that these groups often don’t encourage others to join because they don’t know how, don’t have the time, are afraid to ask, or don’t think about it.

The Invitation Manager tool can help overcome some of these obstacles.

- Ask parents and youth in your unit to talk with others and hand out cards or flyers with your unit’s QR code or URL to the online application (how to on page 16).
- Have parents or youth give you the names and email addresses of friends that they think would be interested in Scouting, input them in the Invitation Manager and send them an invitation to join. (Make sure that the invitation for a youth is sent to the parent’s or guardian’s email address as the parent or guardian is required to register youth under 18 years of age.)

Invitation Manager is also connected to [BeAScout](#), an internet-based tool that parents can use to find a unit in their area. So, families who want to join Scouting can also find your unit there to send in requests for more information or apply directly and complete an application and pay online so that it is ready for you to accept.

You can also use the electronic application at **joining nights** if you have internet access:

- Log in to your [My.Scouting](#) account.
- Open Invitation Manager and select **+New Leads**.
- As prospective members arrive, have them input their email address and other required information into the Invitation Manager new leads form.
- Select all the entries that have been input at the joining event and send everyone a link to your unit’s online application before you begin your short presentation.
- Parents can fill the form out using their smartphone and pay their registration fee by credit card before they leave the joining night.
- The Cubmaster, Committee Chair, or Chartered Organization Representative can open the Application Manager and accept the new youth as applications come in.
- Since adult applications require Youth Protection Training to be completed before acceptance, the Chartered Organization Representative or their designee can view the adult applications that night for any “yes” answers to the screening questions. The applicant will also receive an email with a link to YPT training when they submit their application. The unit leadership should encourage adult applicants to get the training completed as soon as possible so they can accept the application and appoint the person to their leadership role in the unit.
- The system will automatically send the family a welcome email upon your acceptance of their paid application. And, if the unit has selected to automatically send a message, the unit message will also be sent to the family within 24 hours.

UPDATING YOUR MY.Scouting PROFILE

Updating your My.Scouting profile is an essential step to ensuring that you receive the notifications from Invitation Manager or Application Manager showing what actions you must take.

Step 1. Go to my.scouting.org and log in.

If you do not have an account you can create by selecting "Create Account" and inputting the required information.



Step 2. Select **Menu** to get a drop down menu.

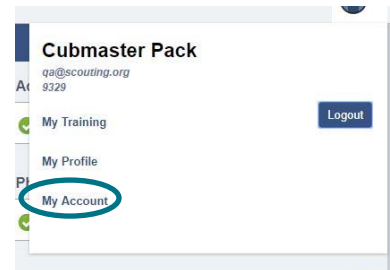


Step 3: Select **My Profile** in the dropdown menu.

You will see your profile information details. Make sure your address, phone number, email address and other information is correct. Be sure to save any changes you make. To add additional information click on the green plus sign next to the item.



Step 4. To change your password and/or update security questions, click on the person symbol and select **My Account** from the dropdown menu.



CONFIGURING THE ONLINE REGISTRATION SYSTEM

Before your unit starts using the online registration system, there are some configuration decisions that the unit must make. The Chartered Organization Representative, or the Committee Chair or their designee has access to make changes through the Organization Manager tool in My.Scouting.

CONFIGURATION OPTIONS

Configurations that your unit can make include:

- **COR delegate** – the Chartered Organization Representative (COR) is the person authorized to assign positions and accept adults in accordance with the BSA Bylaws. This configuration allows the COR to designate another person who is a registered leader in the unit to also assign volunteer positions and accept adult applications.
- **Committee Chair recommendation for adult positions** – This configuration allows the Committee Chair to recommend the adult positions to the CR for approval. If this option is set to “CC and COR Required” the CC will need to Click the Recommend button before the application is available for the COR to accept.
- **Adult application availability** – this configuration allows the unit to turn on or off the availability of the adult application online. The youth application will always be available through the system. Your council can choose to override this option, so you will not see the drop-down box in your configuration options.
- **Unit Fee Message** – only the national registration fee, Boys’ Life subscription fee, and a local council fee (if applicable) is collected through the online payment system. This configuration allows units to inform applicants that the unit has an activity fee, the amount of the fee, and a message about what the fee covers. This message will be sent on the invitation when sent through Invitation Manger.
- **Automated Welcome Email** – the system is configured to send out a welcome email from the BSA National Service Center with a message from the CEO when a youth or adult is accepted by the unit. This configuration sends an automated welcome message from the unit the day after the national welcome message is sent. There is a place for you to add the message that you would like to send to the new families.
- **Family Scouting** – this configuration will only be visible to Cub Scout Packs. This setting will allow you to select if the pack is “boy only”, “girl only”, or accepting “both boys and girls.” This information will show on your unit’s BeAScout pin so that families can use this information to select the pack that is right for their family’s needs. Scouts BSA troops are automatically given the girl troop or boy troop designation that was entered when the unit formed.

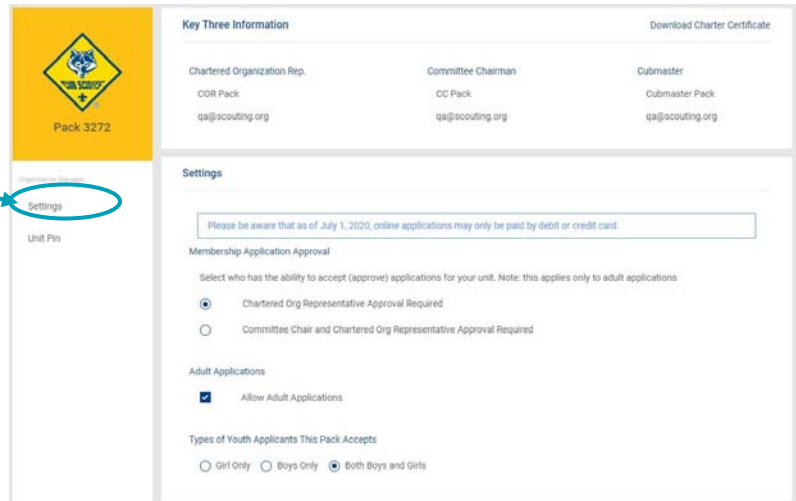
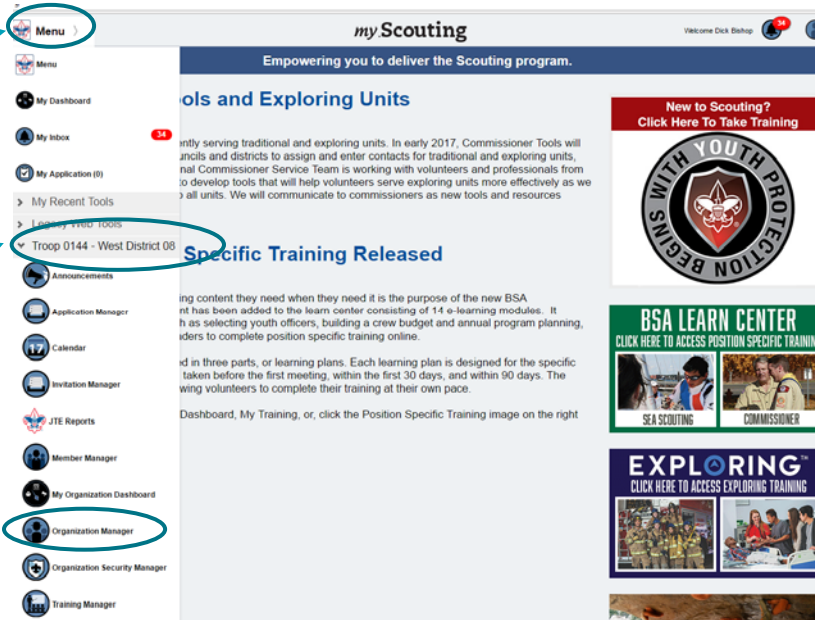
SETTING YOUR UNIT'S CONFIGURATIONS

Step 1: While logged in to your My.Scouting account, select **Menu** at the top left-hand side of your screen.

Step 2: From the drop-down menu select the **unit** you will be configuring.

Step 3: Select **Organization Manager**

Step 4: They system should automatically default to open in **Settings**.



Step 5: Set configurations:

- **CC Recommendation:** Select whether you want the CC to recommend adult positions. Default is CR only.
- **Adult Application Availability:** If you want to turn off adult application availability change that setting. (If this is not available the council has elected to configure this option for all units.) Default is to accept adult applications.
- **Types of youth Applicants** – if you are a pack, you will see this setting. Select whether your pack accepts girls only, boys only, or both boys and girls.

Key Three Information Download Charter Certificate

Chartered Organization Rep. COR Pack qa@scouting.org	Committee Chairman CC Pack qa@scouting.org	Cubmaster Cubmaster Pack qa@scouting.org
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Settings

Please be aware that as of July 1, 2020, online applications may only be paid by debit or credit card

Membership Application Approval
Select who has the ability to accept (approve) applications for your unit. Note: this applies only to adult applications

Chartered Org Representative Approval Required

Committee Chair and Chartered Org Representative Approval Required

Adult Applications

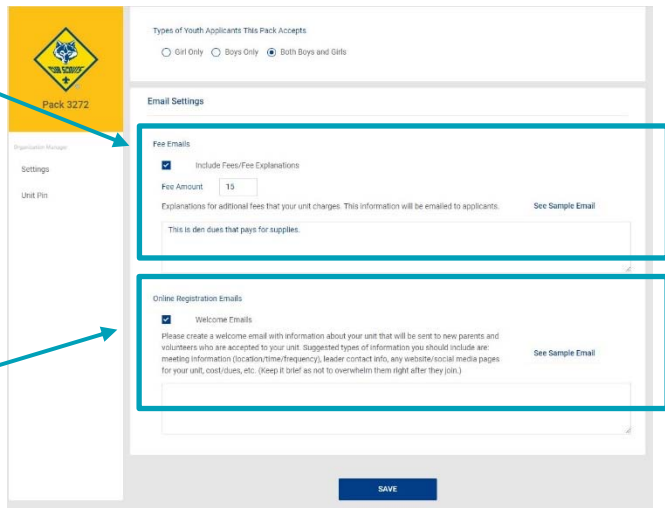
Allow Adult Applications

Types of Youth Applicants This Pack Accepts

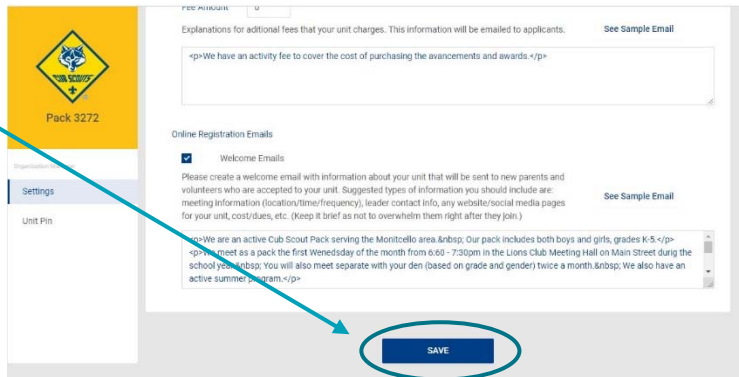
Girl Only Boys Only Both Boys and Girls

If you are in a troop this will automatically populate in BeAScout based on your unit type.

- Unit Fee Message:** If you would like to display a message about additional unit fees in the invitation email, select opt in and type in the fee amount and a message about what the fee covers. Default is opt-out.
- Automated Welcome Email:** If you would like an automated welcome email from your unit to be sent upon acceptance of an application **select opt-in** and type your message in the space provided. Opt-out is the default. There will be a National Welcome email sent immediately after acceptance and the unit welcome email will be sent on day 2.



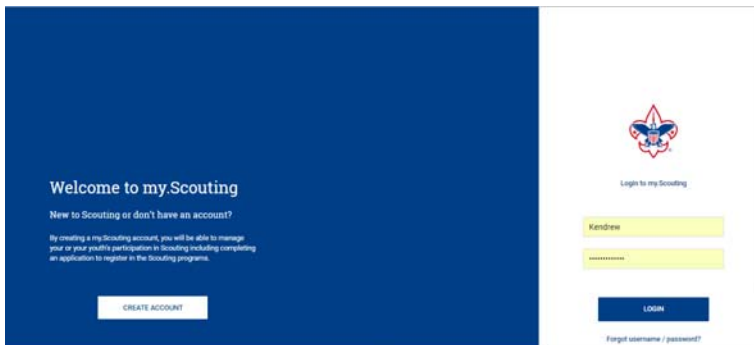
Step 6: Save your selections.



Setting Up Your Units BeAScout Pin

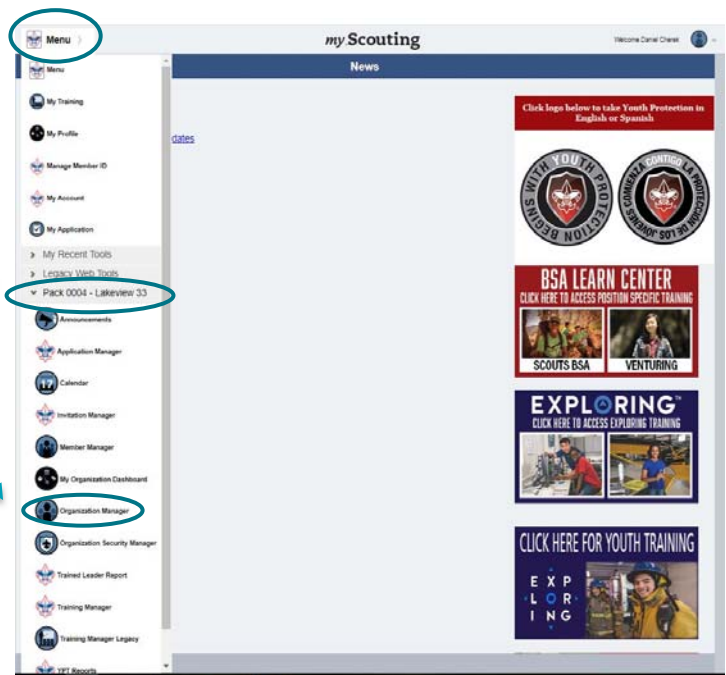
BeAScout is an online site that prospective members can use to find a unit near them. To prepare for your **My.Scouting Tools Online Registration** go-live, please verify that your BeAScout pin is turned on and that the contact information is current and displays the information you want shown for your unit.

Step 1: Log in to your My.Scouting account. - my.scouting.org



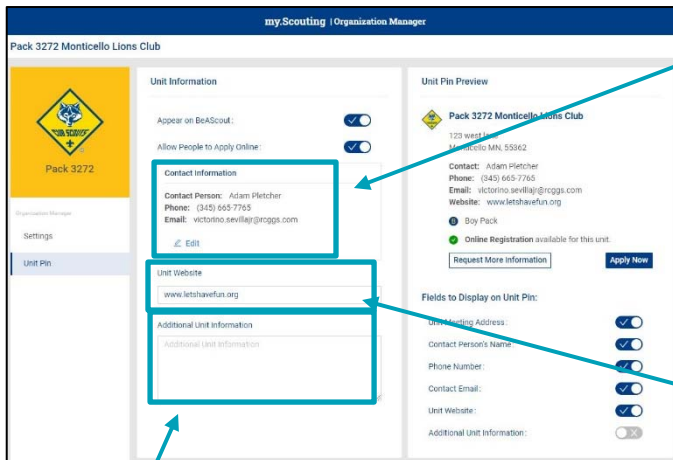
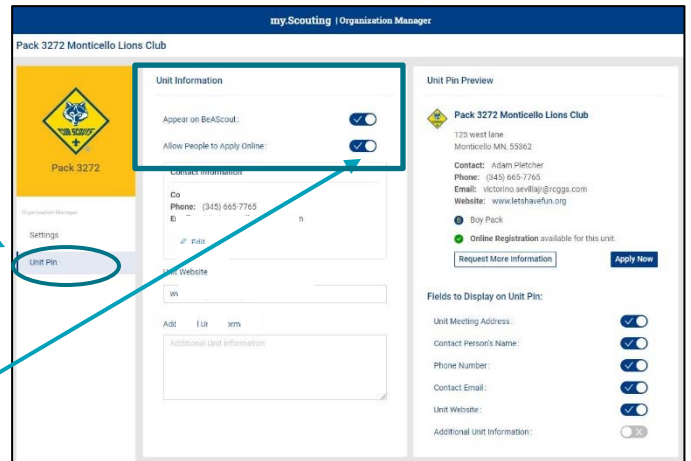
Step 2: Go to Organization Manager

- Select **Menu**
- Select your unit
- Select **Organization Manager**



Step 3: Update your Unit Information

- A. Select **Unit Pin** on the left-hand side of the screen you will now see the fields available for setting up your BeAScout Pin.
- B. In the **Unit Information** section of the screen, set the **Appear on BeAScout** to the on position. If the check mark is visible then the setting is in the on position. Turning this on allows the unit pin to show on the map.
- C. Set **Allow People to Apply Online** so it is in the on position with the check mark showing.



- D. Add your units **Primary Contact information** – this will be the person whose information will be visible when someone clicks on your unit’s pin. It is recommended that you include an email address. The telephone number is optional and will only show if you select to display it. Use the edit button to change the contact information.
- E. Enter your unit’s web address in the Unit Web Site box.

- F. Add **additional information** – frequently asked questions can be addressed here such as what day and time the unit usually meets. This field is optional but can help parents determine if your unit meets their needs before they apply.
 - For Packs you may list your den meeting info, such as days and times –remember new parents who have never been in Scouting may be unfamiliar with our program. So, including things like “Tigers meet on Monday” will not be helpful, instead say “1st graders meet Monday”
 - For Troops, Teams, Crews, or Ships – you may want to list any specialty areas of interest your unit does such as a Troop that focuses on hiking, or a Crew that focuses on scuba, or a Ship that focuses on sailing small crafts, things that will help people decide if it is the right unit for them.

G. **Check your unit meeting address** and correct if needed. It will default to your Chartered Organization address. If this is not where your unit meets edit the address so that your meeting location will show on the pin.

If you change the unit meeting address, be sure to click the Locate button so that the latitude and longitude for the address you entered are mapped.

Step 4: Select the fields to display on the unit pin.

The fields you can choose from are displayed in the Unit Pin Preview. The unit type you configured in Settings will automatically show and the apply now online will show if you enabled it in the previous steps.

The fields you select will display in the Unit Pin Preview as you enable them so that you can see what will be displayed on your BeAScout pin.

Only those fields that have the check mark next to them will display in BeAScout

If you have made any change be sure to SAVE so that all of the changes are applied.

ASSIGNING REGISTRATION INQUIRY, KEY 3 DESIGNEE, AND COR DELEGATE FUNCTIONAL ROLES

If your unit has adult volunteers who are helping manage unit recruitment and who need read only access to view leads and submitted requests in Invitation Manager and Application Manager you can assign them a functional role of “Registration Inquiry” in the system.

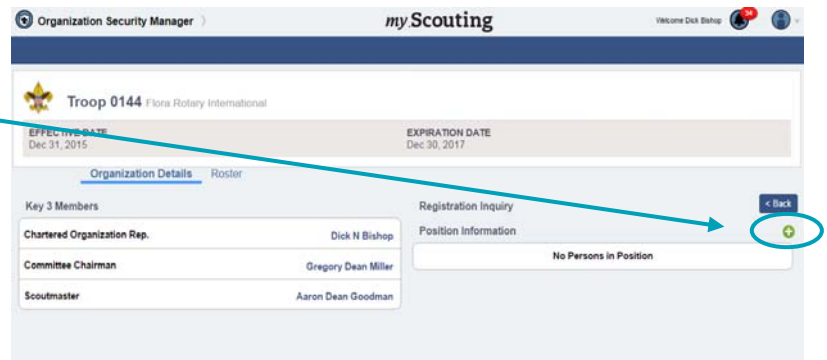
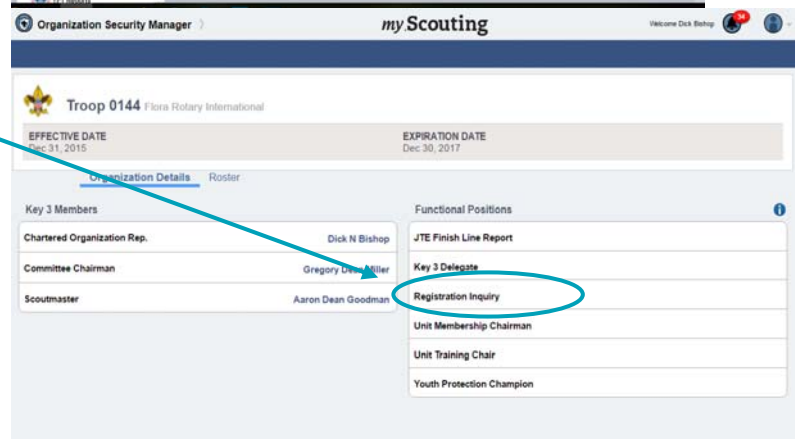
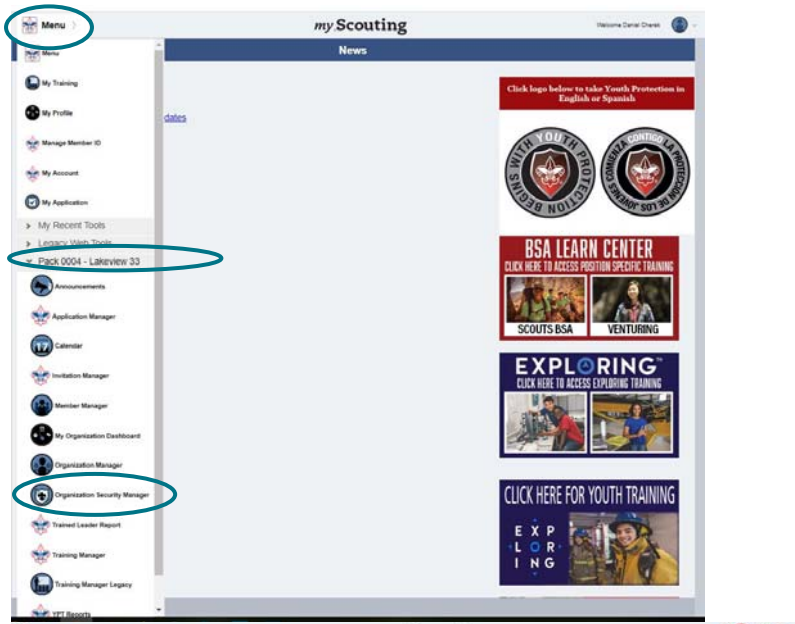
Step 1: While logged in to your My.Scouting account, select **Menu** at the top left-hand side of your screen.

Step 2: From the drop-down menu select the **unit** to which you want to add this functional role.

Step 3: Select **Organization Security Manager**.

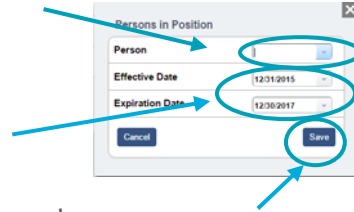
Step 4: Select **Registration Inquiry**.

Step 5: Select the **plus sign** to select the registered adult.



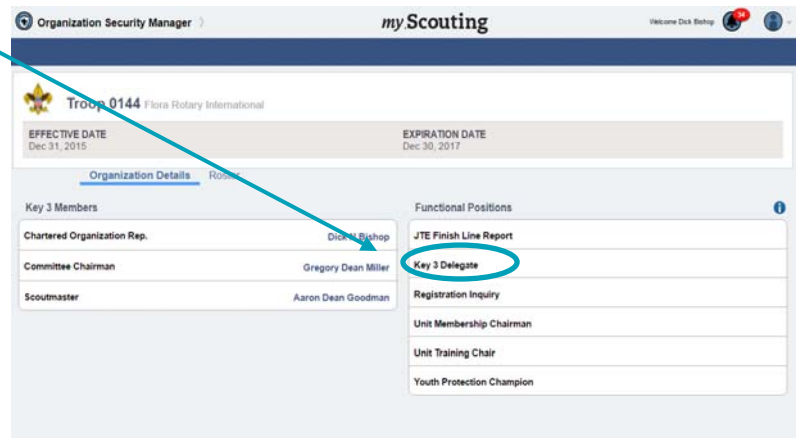
Step 6: Select the **person** from the drop-down menu. Only adults registered in your unit will show.

- You can set effective and expire dates for this role. Default is the unit effective and expire date.



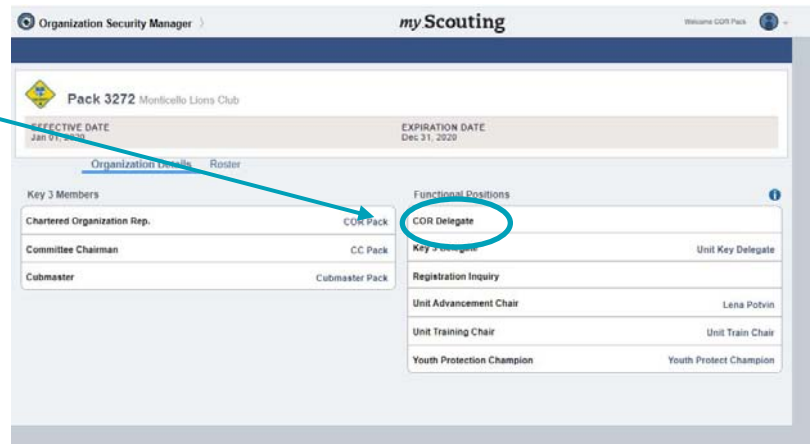
Step 7: Save. It may take overnight before the person assigned shows as a delegate in that position.

These same steps should be followed to add Key 3 Designees.



Only the COR will have access to select a COR Delegate in Organization Security Manager.

This role only applies to online registration only. Paper applications for adults must still be signed by the COR only.



INVITATION MANAGER

KEY UNIT ROLES AND ACTIONS IN INVITATION MANAGER

The following unit positions have full access to the Invitation Manager Dashboard on My.Scouting where they can add leads, manage inquiries from prospective Scouts, and send joining invitations:

- Chartered organization representative (COR)*
- Committee chair (CC)*
- Unit leader (Cubmaster, Scoutmaster, Crew Advisor, Skipper, Coach)*
- Institutional Head/Chartered Organization Executive Officer (IH)
- New Unit Coordinator
- Key 3 Delegate

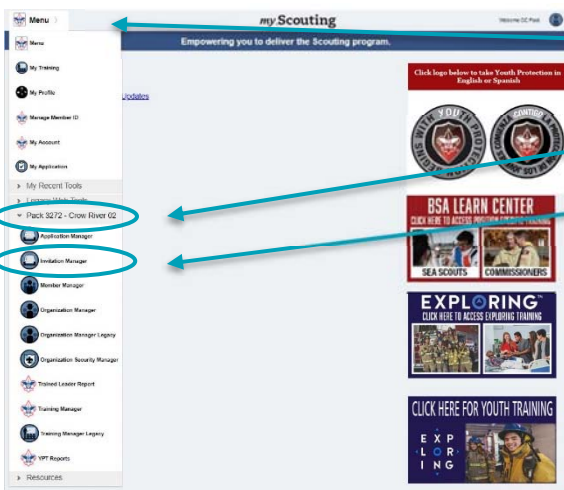
* = Members of the Unit Key 3

The Unit Key 3 can assign a “Registration Inquiry” functional role to other unit volunteers who need read only access to view lead status and submitted requests.

USING INVITATION MANAGER - OVERVIEW



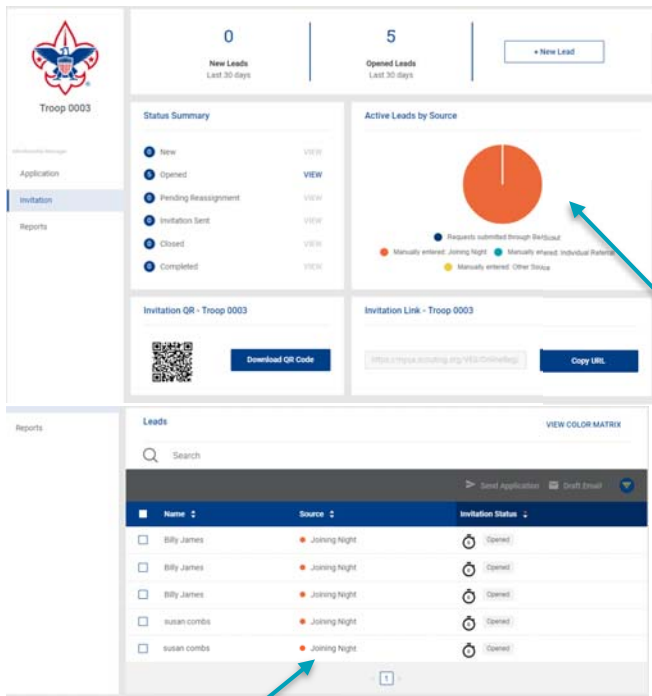
To view and act on an inquiry that has been submitted to your unit, you'll want to log in to my.scouting.org.



Step 1: Select Menu in the upper left corner.

Step 2: Select your unit.

Step 3: Select Invitation Manager from the drop-down list.



The top section of the dashboard provides a quick status overview of the number of leads/requests submitted over the last 60 days that are either:

- **New** – the lead originated in BeAScout and nobody in the unit has opened this record;
- **Opened** – someone in the unit has opened the lead or has entered the lead manually, but no invitation has been sent.

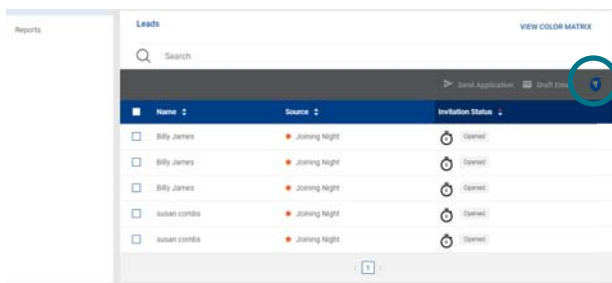
Leaders should view new and open leads to see if there is a request for information that needs to be answered before it is appropriate to send an application email.

The pie chart gives you a visual representation of the source of active requests in the system.

Hovering over each color in the pie chart displays the number of active requests in that category.

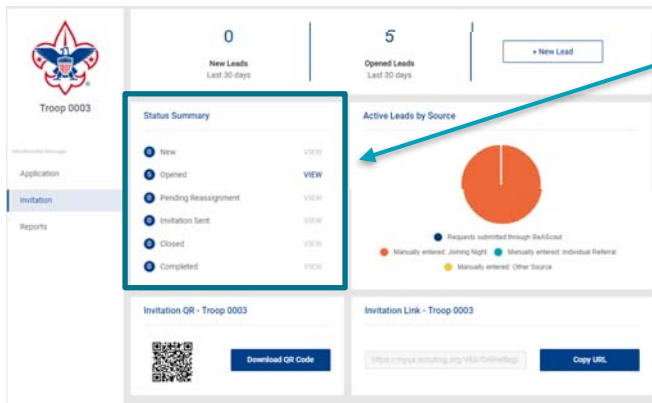
- **Blue** = requests submitted through BeAScout.
- **Orange** = manually entered from joining night.
- **Teal** = manually entered from an individual referral.
- **Yellow** = manually entered from a source other than those listed above.

The colors in the pie chart correspond to the colored circle next to the person's name in the Leads section at the bottom of screen.



The Leads section of the dashboard shows the name, lead source, and time in the system.

- The default sorting for the bottom LEADS section is to display New & Opened requests first, those in Pending Reassignment next, and those for which an Invitation was sent last.
- Those awaiting action the longest will appear at the top.
- The filter can be used to change the leads you see by source or by invitation status



The **Status Summary** displays the number of requests that fall under the following statuses:

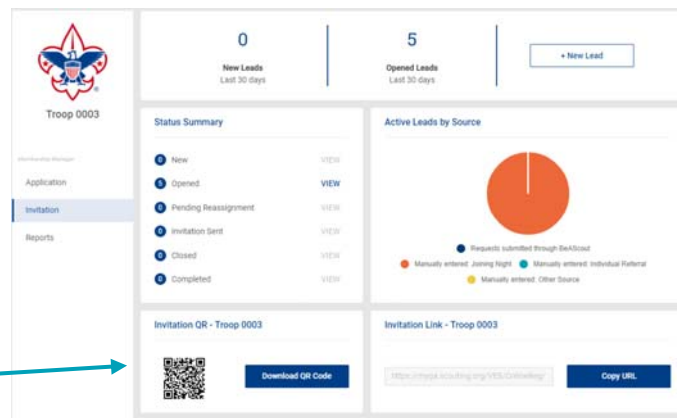
- **New** - request from BeAScout that has not been opened.
- **Opened** - request has been viewed or entered manually.
- **Pending Reassignment** - request has been sent to the district to be moved to a different unit.
- **Invitation Sent**
- **Closed** - requests either timed out after 60 days of inaction or were manually closed by the unit.
- **Completed** - an invitation has been sent and opened and the person has initiated an online application.

If an invitation is not sent within 60 days, the lead will go to Closed status and no longer show in Leads.

USING URL'S AND QR CODES

URL's and QR codes provide links that are specific to each unit. These can be used on handouts, fliers, and unit emails that are not sent through Invitation Manager.

To access the URL or QR code, select the URL or QR code button. URL's will automatically save to your clipboard so that you can paste it into a document as long as the clipboard is active. QR codes will download as an image file, so you will be asked where you want to save the image for later use.



PROCESSING LEADS

The screenshot shows the Troop 0003 interface. The 'Leads' table has columns for Name, Source, and Invitation Status. The 'Source' column is highlighted with a red circle, and the 'Send Application' and 'Draft Email' buttons are also highlighted with red circles. Arrows point from these elements to the text on the right.

The **Source** column allows you to sort the Leads by the source through which they were received. This allows you to process from specific sources easily.

The **Send Application** button allows you to send applications to more than one person at a time.

The **Send Email** button allows you to send a message to one or more selected leads.

The **Filter** icon allows you to filter this list by source or by invitation status for easier processing.

The filter dialog box shows the following options:

Source	Invitation Status
<input type="checkbox"/> BeAScout	<input checked="" type="checkbox"/> Initiated
<input type="checkbox"/> Joining Night	<input checked="" type="checkbox"/> New
<input type="checkbox"/> Individual Lead	<input checked="" type="checkbox"/> Opened
<input type="checkbox"/> Other	<input checked="" type="checkbox"/> PendingReassignment
	<input checked="" type="checkbox"/> Sent
	<input type="checkbox"/> Closed
	<input type="checkbox"/> Completed

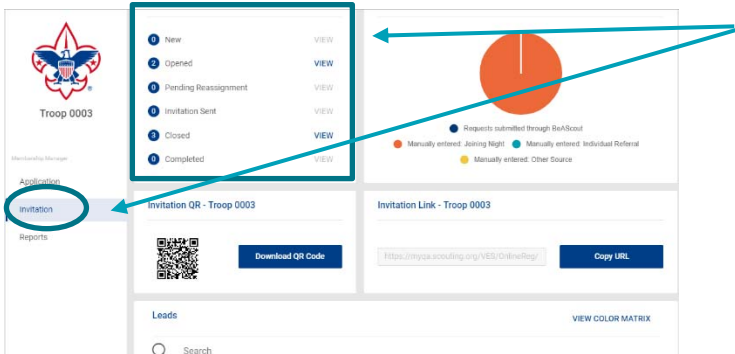
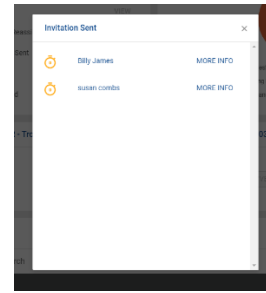
Buttons: CLEAR OPTIONS, SHOW RESULTS

EXAMPLE: If you have a joining night and you want to send the application to everyone attending that night...

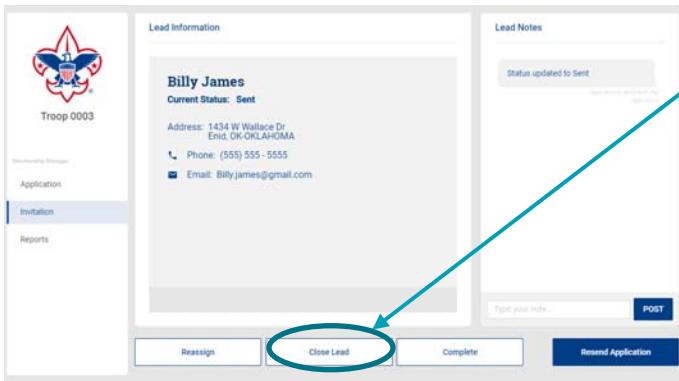
The screenshot shows the Troop 0003 interface. The 'Leads' table has columns for Name, Source, and Invitation Status. The 'Send Application' button is highlighted with a red circle, and the 'Source' column is also highlighted with a red circle. Arrows point from these elements to the text on the right.

- First, sort by Source using the up or down arrows next to the word Source or use the filter.
- Next, select the boxes next to the leads to which you would like to send an invitation.
- Then, click on the send applications icon in the grey ribbon above the lead list.

You will see a notification of which leads received invitations after you click the send invitation button.



When you select the **Invitation** button on the menu to the left, your screen will refresh, and you will see the number next to the **Invitation Sent** category increment by the number of invitations just sent and the new and/or opened will decrease by the same number.

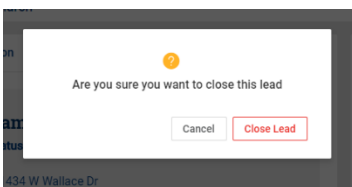


Close Lead. You would use this button if:

- You already have a paper application for this lead.
- You have talked with the person and they no longer want to join your unit.

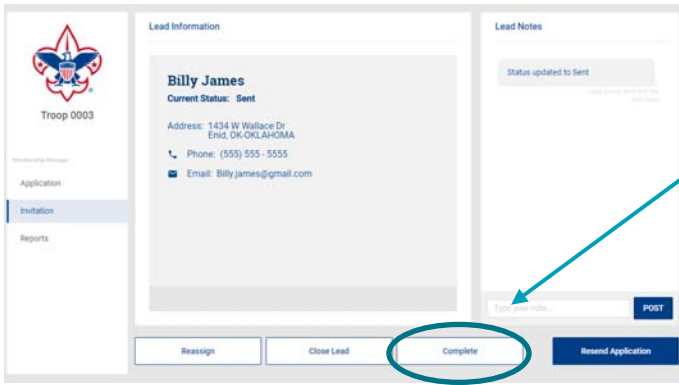
Selecting **Close Lead** will remove the request from your leads list and place it in the Closed category in the Summary section of your dashboard.

You can always reopen the closed request which will return it to your leads list.



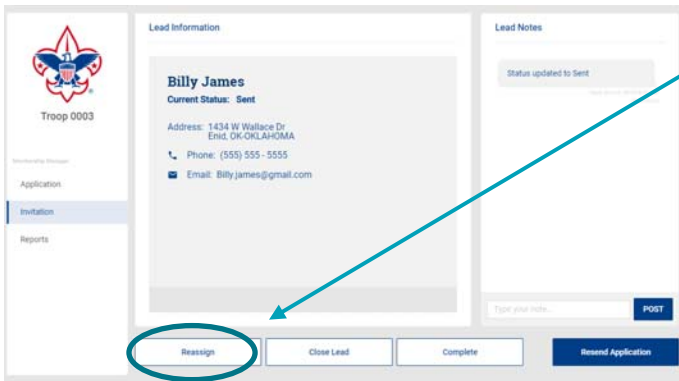
To Close a Lead:

Select the lead you would like to close from the list and select the **Close Lead** button. You will get a warning asking if you are sure you to close the lead.



Complete a Lead:

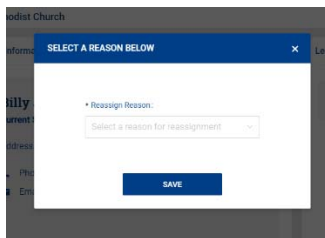
After you receive a completed application from the lead you should go back to the lead and indicate it is complete to clear it from your lead list.



Reassign the Lead:

Select the reassign lead button if the application needs to go to another unit.

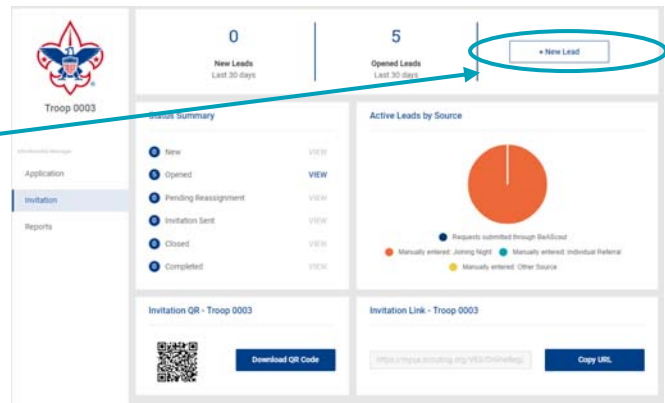
- The request is moved to the District's dashboard so they can find another unit to take the request.
- You will be prompted to select a reason for reassigning the application.
- The request will be placed in the Pending Reassignment category under your By Status tab.
- The request will be removed from your Pending Reassignment after District action.



NOTE: Your council may have auto reassignment turned on so if you do not take quick action (within 5 days) on a lead it may be directed systematically to the District Executive.

ADDING LEADS MANUALLY

Step 1: Select +New Lead.



Step 2: Select the Lead Source from the dropdown list. This can be Joining Night, Individual Lead, or Other.

A screenshot of the 'Lead Source' dropdown menu. The dropdown is open, showing a list of options: 'Lead Source'. The dropdown is circled in red.

Step 3: Enter information in each required field. Fields that are required are denoted by an asterisk next to the field.

A screenshot of the 'Parent / Guardian / Volunteer Information' form. The form contains several fields: '* First Name', '* Last Name', 'Suffix', '* Email Address', '* Phone Number', 'Country', 'Address Line 1', 'Address Line 2', 'City', 'State/Region', and 'ZIP Code'. The asterisk indicates required fields. The 'Address Line 1', 'City', and 'ZIP Code' fields have a red border and a red exclamation mark icon, indicating they are required and currently empty.

Step 4: Save. If you are using this as your sign-in for a joining night you have the option of pressing save and add which will save and clear the form for the next entry.

A screenshot of the bottom of the form, showing three buttons: 'SAVE AND ADD ANOTHER', 'SAVE', and 'SEND APPLICATION'. The 'SEND APPLICATION' button is highlighted with a red box.

Step 5: Send Application.



Dear Carrie Cash,

We're excited you're interested in building an adventure with Crew 0003 chartered by Greensburg United Methodist Church. Within Scouting, you'll find dynamic and engaging programs that offer life-changing experiences in the areas of character development, leadership, citizenship and adventure...not to mention fun!

The online application charges only for national membership fees and *Boys' Life* magazine subscription.

Please select the registration fee AND the subscription to *Boys' Life*. If you have more than one child in Scouting, please request only one *Boys' Life* subscription family. After you have made the payment via credit card and submit your child's application, Crew 0003 be notified. Crew 0003 will reimburse you for the full amount of the registration fee AND *Boys' Life* subscription as long as you/your Scout agrees to participate in one fundraising event (such as parking cars for a Moda Center event one evening, assisting at a parish breakfast, or selling 120 meat sticks in the spring).

To get started, please click the application link below.

[Click here to start your application](#)

If you need assistance in completing the application, please reach out to the Member Care Contact Center at myscouting@scouting.org or call (972) 580-2489, Monday through Friday from 7am - 7pm Central Time. We'd be happy to assist!

Once your registration has been processed, you will receive an email with contact information, and additional details about Scouting.

Thank you again. You've made a great choice! Let the fun and adventure of Scouting begin!



An invitation will be sent to the requestor and you will be returned to invitation dashboard.

APPLICATION MANAGER

KEY UNIT ROLES AND ACTIONS IN APPLICATION MANAGER

Below are the unit positions that have access to Application Manager and the actions they can perform.

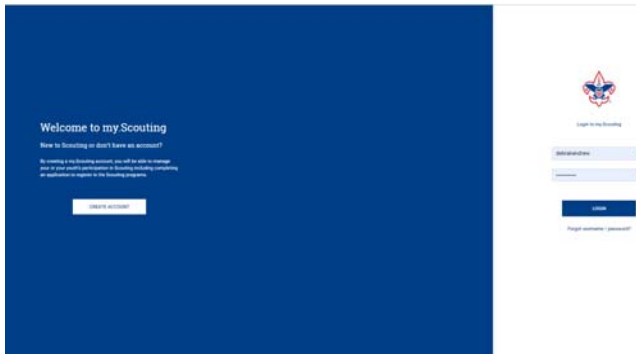
Unit Position	Actions
Chartered organization representative (CR)*	<ul style="list-style-type: none"> Review and accept or reject unit's adult leader applications. This is the only role that can accept or reject adult applications. Reviews and accepts or rejects unit's Venturing adult participant applications. Can review and accept or reject unit's youth applications (shared unit Key 3 role.)
Chartered organization representative designee	<ul style="list-style-type: none"> Same duties as CR above.
Unit committee chair (CC)	<ul style="list-style-type: none"> Can review unit's adult applications and make recommendations to approve to the CR. Can review and accept or reject unit's youth applications (shared unit Key 3 role.)
Unit leader (Cubmaster, Scoutmaster, Crew Advisor, Skipper, Coach)	<ul style="list-style-type: none"> Reviews and accepts or rejects unit's youth applications (shared unit Key 3 role – primary)

* If necessary, the institutional head/chartered organization executive officer (IH) can also perform the same duties as the CR.

The following have read only access to view application status to ensure the unit is acting on applications in a timely manner:

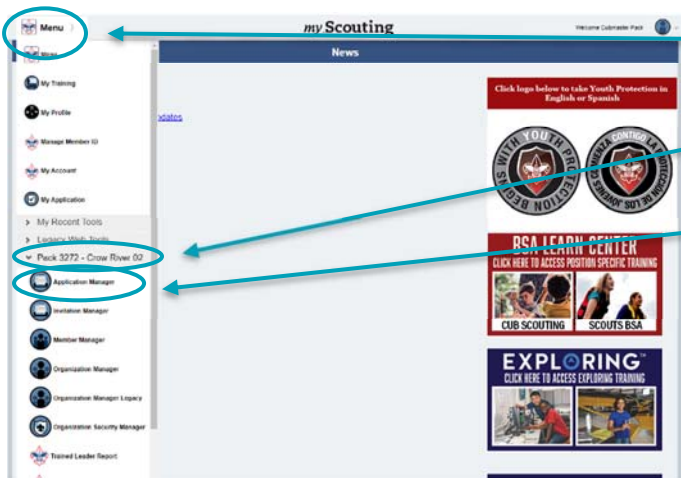
- New Member Coordinator and
- Registration Inquiry (go to page 12 for instructions on assigning this functional role.)

USING APPLICATION MANAGER



OVERVIEW

To view and act on applications that have been submitted to your unit, you'll want to log in to my.scouting.org.

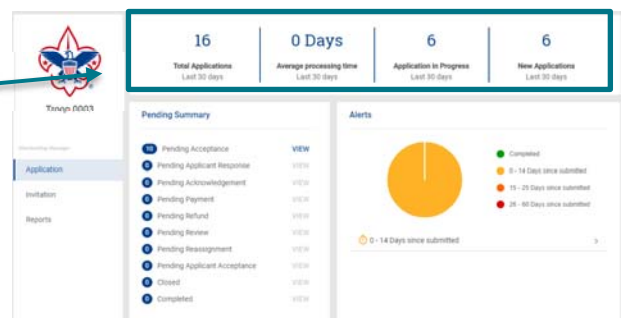


- Select **Menu**.
- Select your **unit name** in the dropdown list.
- Select **Application Manager**.

Application Manager Dashboard Overview

The top section of the dashboard provides a quick overview of application processing statistics over the last 60 days.

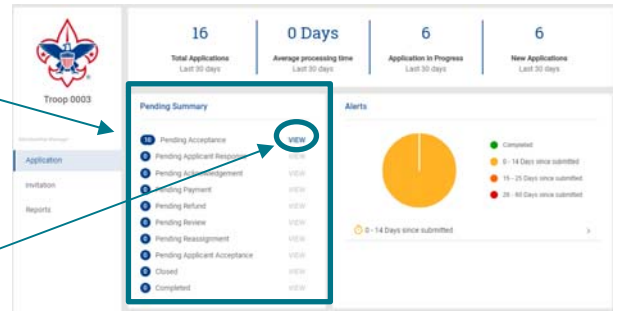
The application is tracked through the system for 60 days, after which the application is timed out and removed from the list. That is why the view is always of the last 60 days. This is to encourage units to take timely action.



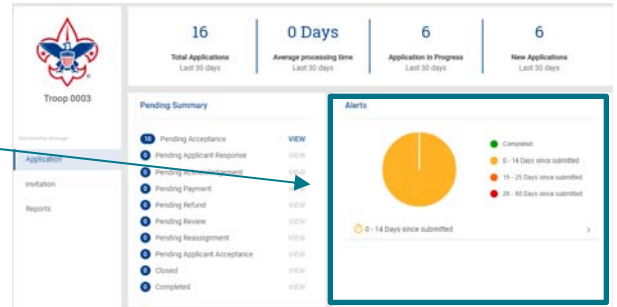
The **Summary** section of the dashboard contains a list of the different statuses that the applications can be in depending on the actions you have taken.

You will see the number of applications in each status in the blue circle to the left of the status.

Select **View** to display the unit's applications that are in that status.

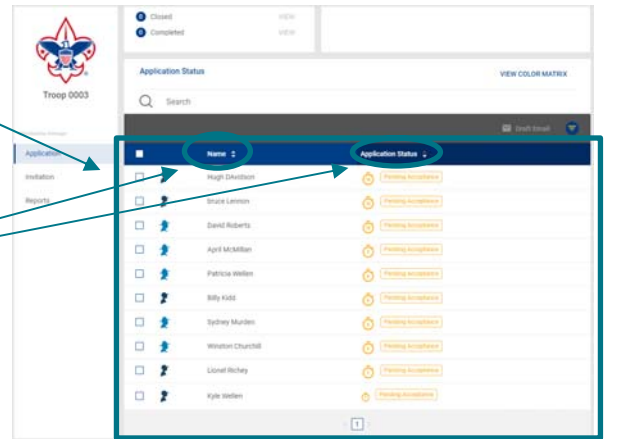


The **Alerts** section of the dashboard shows you how long applications have been pending since they were first submitted.

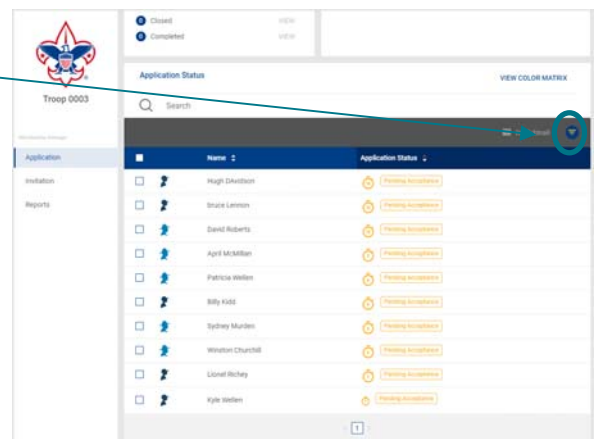
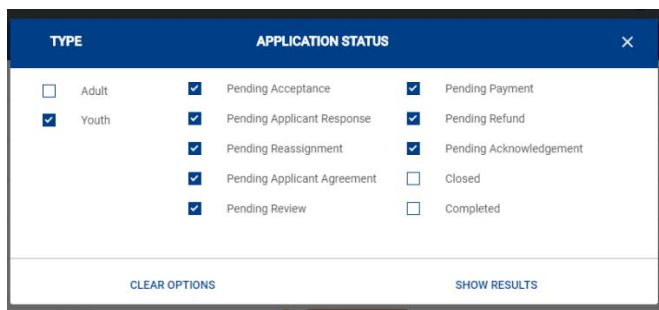


The **Applicants List** is at the bottom of the dashboard. This list contains the applications that have not completed processing. When you first open the dashboard, the list will display the applicants who have been in the queue to longest.

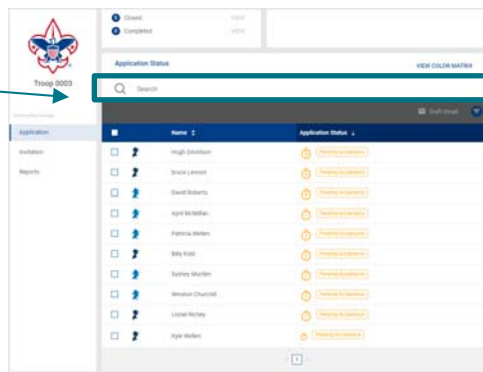
Applications can be sorted by name and application status by using the arrows next to each column name.



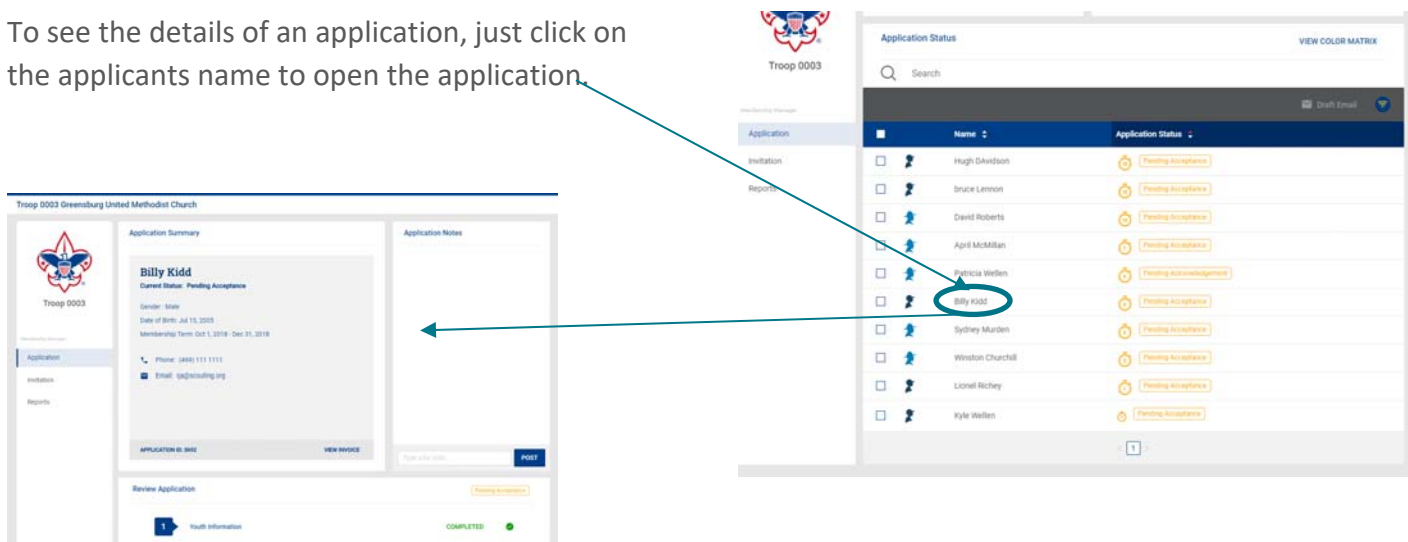
You can also **Filter** applicants by:



To **Search** for a specific individual, type the name in the search field or Application ID.



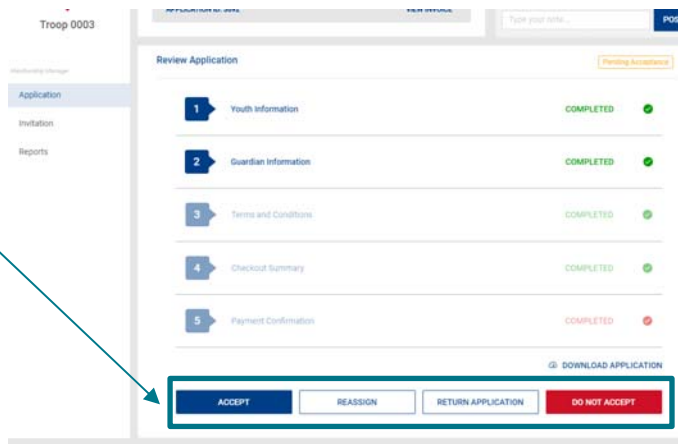
To see the details of an application, just click on the applicants name to open the application.



In this view, you can review parts one and two of the application.

If it is a record that you can act upon, you'll see the action buttons at the bottom of the screen.

To close the record and return to the main dashboard select Applications on the left-hand side of the screen.



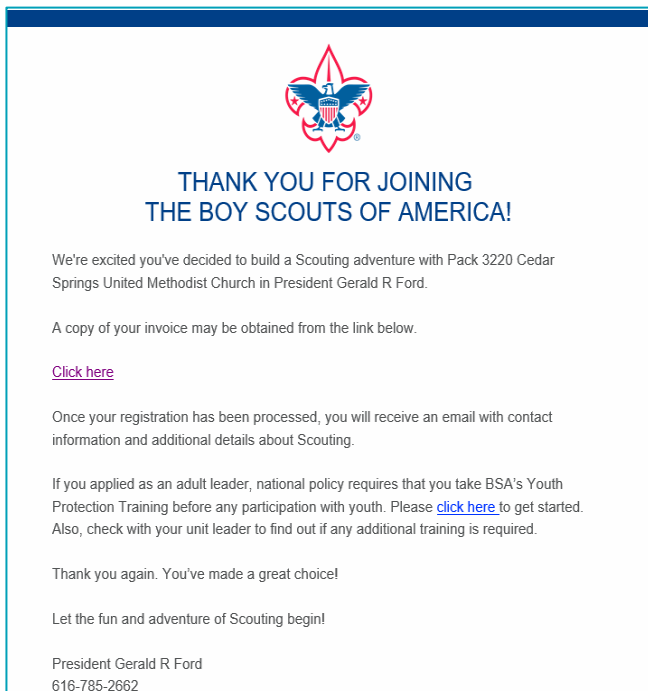
UNDERSTANDING PAYMENTS

Only Credit/Debit cards are accepted by the online registration system. This makes it easy for you to know that anyone who has applied has paid their national and council fees (if applicable).

Fees collected through online registration include only:

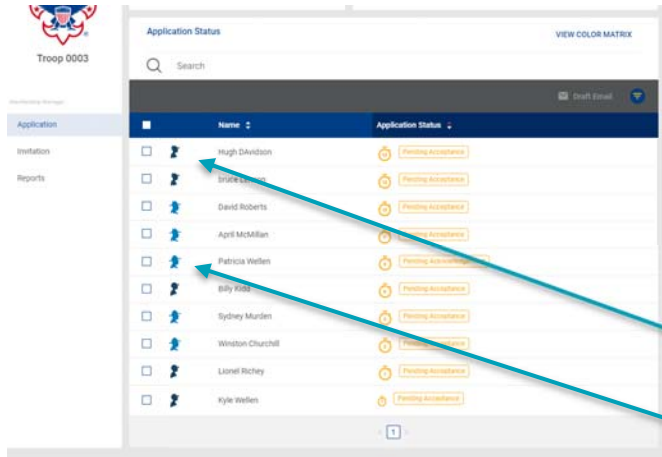
- Registration fees
- Boys' Life subscription fees , if applicable
- New Youth fee, if applicable
- Council fees, if applicable

Unit fees are not collected by the system; however, a generic message about unit fees is included in the checkout screen. "Uniforms costs and other other resources are not included. There may be additional fees payable directly to your unit. Please contact your unit to learn more."



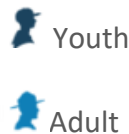
To the left is an example of email with the receipt link an adult receives upon submitting their application. The message also provides the adult with a link to Youth Protection training so that they can complete their training before they meet with youth.

PROCESSING YOUTH APPLICATIONS

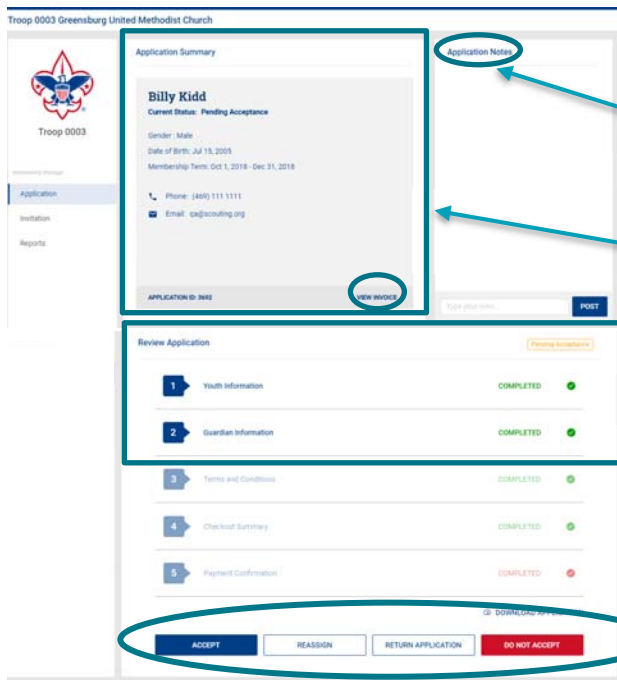


The position primarily responsible for accepting youth applications is the Unit Leader (Cubmaster, Scoutmaster, Venturing Advisor, Skipper, or Lab Manager); however, the Committee Chair and the Chartered Organization Representative or the COR Designee can also accept youth applications.

Each application is identified as either that of a youth or an adult.

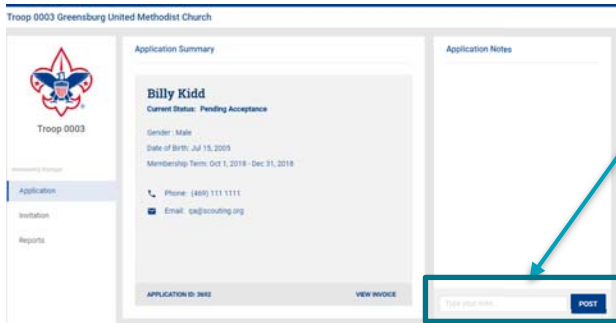


Click on the name of the youth applicant to open the application.



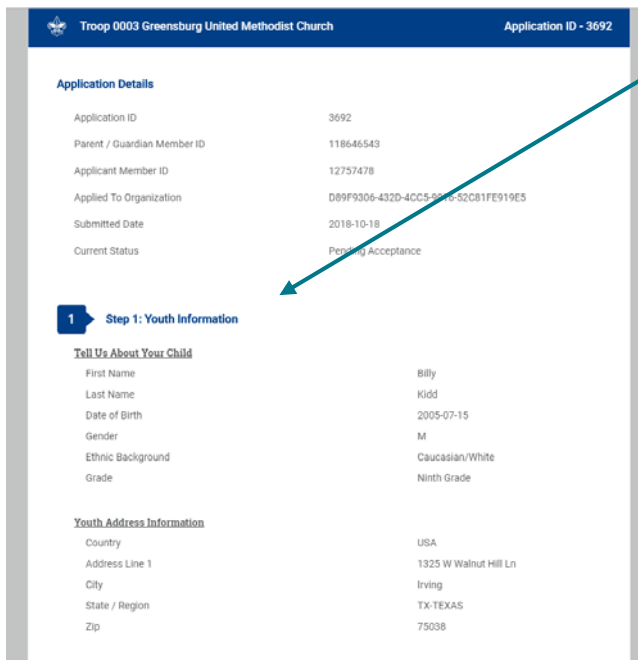
An Application Actions window appears. The main sections are:

1. **Application Notes** – you can add notes here so that others in your unit who have access will know what you have done.
2. **Application Summary** – shows basic detail from application and displays the Invoice so you can see if payment has been made online.
3. **Review Application** – allows you to see the information on the application before you accept the applicant or move them to another status.
4. **Application Actions** – this is where you accept, reassign, or do not accept the applicant.

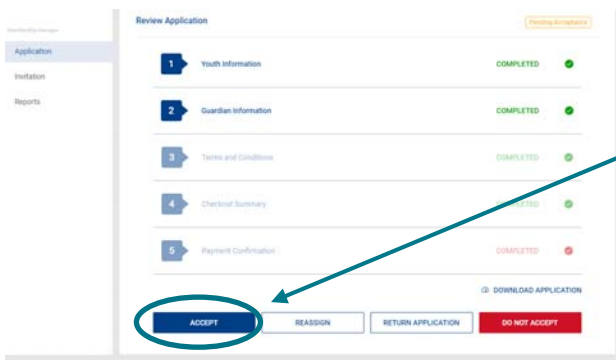


To **add a note**, click in text box, type your message and **click Post**. Whatever is entered here becomes an official and permanent part of the application records.

Your note will be added, along with your login information and the date. These notes are sorted oldest to newest. Notes allow others in your unit who can take action or who have viewing rights to know what has been done.

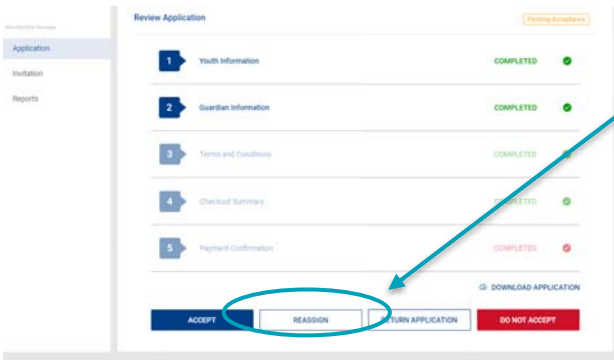


When you choose **Step 1** in the **Review Application** section, you will see a screen like the one to the left. Here you can view the details about the youth, parent, and the Lion or Tiger adult partner.

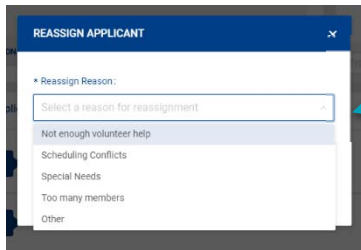


Step 2: Accept, Reassign, or Close the Application

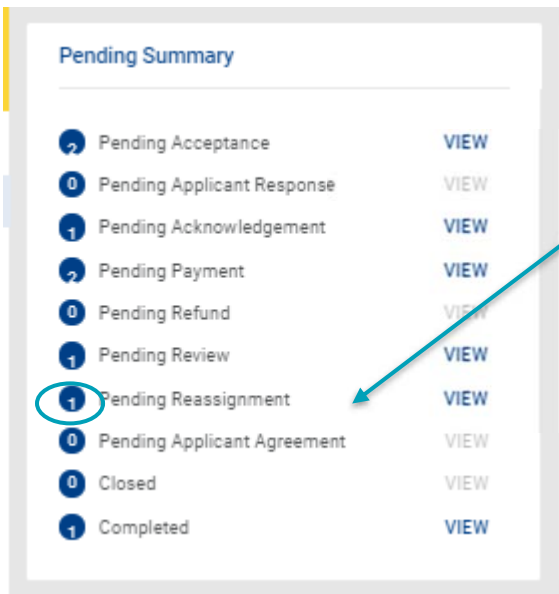
When you **accept an applicant**, the system will automatically email them their onboarding materials and assign them to your unit. You have no further action to take besides welcoming them to your unit.



If you receive an application and cannot accommodate the youth or find that your unit is not the right one for them, you will need to click **Reassign**. Don't forget to add any notes before you click on Reassign.

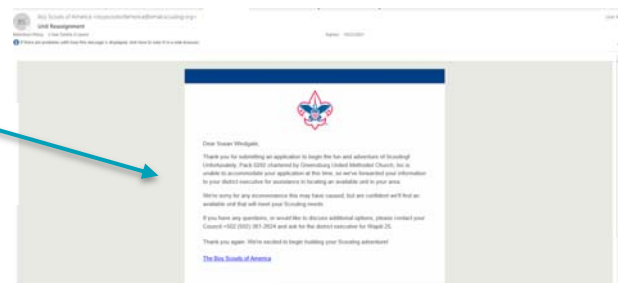


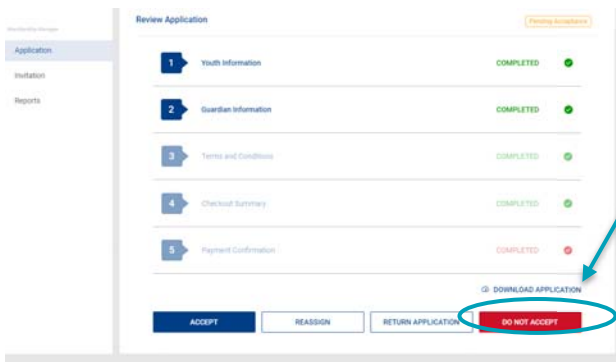
Select a reason for the reassignment request from the list provided. This will be used for reporting purposes.



Once you have selected the reason, click **Confirm** and the application will be moved to Pending Reassignment status in your Summary section of the application manager dashboard. And, the application will be sent to the district to reassign to another unit.

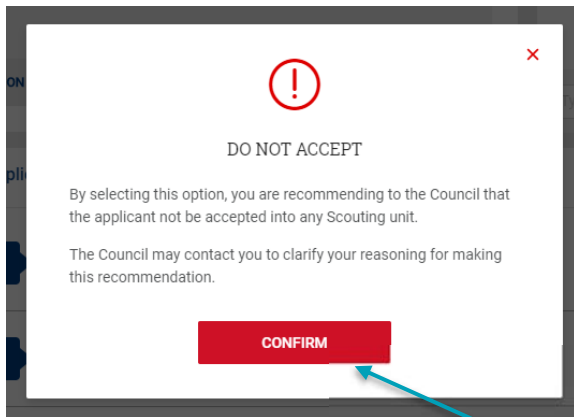
The applicant will receive an email message letting them know that the unit has reassigned their application to the district. It also contains the council contact information so that the applicant can follow up with the council.





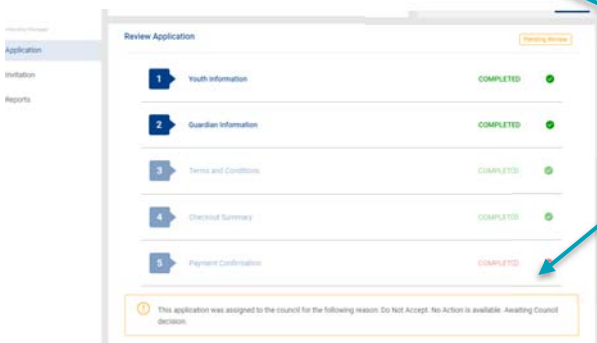
The final option you have for Youth applications is **Do Not Accept**.

If you identify an applicant you recommend for Do Not Accept, select the application record and click **Do Not Accept**.



If you select **Do Not Accept** you will receive a **warning message** like the one on the left.

Do not record the reason for your decision in the Application Notes. That should be a conversation between you and the council.



Click **Confirm** (clicking **X** will return you to the applications for you to choose a different action).

After you click confirm, the status will change to **Pending Review** and a status message will appear at the bottom of the application detail.

Close the application by selecting applications on the left-hand side of your screen.

If you need to return to the application for any reason, it will be available under the **Pending Review** status in the Summary section of your Application Manager dashboard until the Council takes action.

PROCESSING ADULT/ADULT PARTICIPANT APPLICATIONS

11 Total Applications
Last 30 days

0 Days Average processing time
Last 30 days

7 Application in Progress
Last 30 days

3 New Applications
Last 30 days

Pending Summary

- Pending Acceptance [VIEW](#)
- Pending Applicant Response [VIEW](#)
- Pending Acknowledgement [VIEW](#)
- Pending Payment [VIEW](#)
- Pending Refund [VIEW](#)
- Pending Review [VIEW](#)
- Pending Reassignment [VIEW](#)
- Pending Applicant Agreement [VIEW](#)
- Closed [VIEW](#)
- Completed [VIEW](#)

Alerts

- Completed
- 0 - 14 Days since submitted
- 15 - 25 Days since submitted
- 26 - 60 Days since submitted
- 0 - 14 Days since submitted




Application Status [VIEW COLOR MATRIX](#)

Search

Name	Application Status
Carrie Muller	Pending Payment
Grant Thornton	Pending Payment
PATRICIA WELLEN	Pending Acknowledgement
Spencer Davidson	Pending Review
Fanny Mae	Pending Acceptance
Jayson McDonald	Pending Acceptance
Betty Ruble	Pending Acceptance

Processing Adult applications is very similar to Youth applications. However, adult application actions can only be processed by the **Charter Organization Representative (CR) or their designee**. The Committee Chair can recommend to the CR if the unit has chosen that option in the system configurations.

Each application is identified as either that of a youth, Venturing Participant or an adult.

-  Youth
-  Venturing Participant
-  Adult

If you want to only process adults, you can **Filter** applicants by application type:

TYPE		APPLICATION STATUS	
<input type="checkbox"/> Adult	<input type="checkbox"/> Pending Acceptance	<input type="checkbox"/> Pending Payment	
<input checked="" type="checkbox"/> Youth	<input type="checkbox"/> Pending Applicant Response	<input type="checkbox"/> Pending Refund	
From Date:	<input type="checkbox"/> Pending Reassignment	<input type="checkbox"/> Pending Acknowledgement	
<input type="text" value="MM/DD/YYYY"/>	<input type="checkbox"/> Pending Applicant Agreement	<input type="checkbox"/> Closed	
To Date:	<input type="checkbox"/> Pending Review	<input type="checkbox"/> Completed	
<input type="text" value="MM/DD/YYYY"/>			
CLEAR OPTIONS		SHOW RESULTS	

Troop 0003

Application Status: [VIEW COLOR MATRIX](#)

Search

Name	Application Status
Hugh Davidson	Pending Acknowledgement
Stacie Linton	Pending Acknowledgement
Daniel Roberts	Pending Acknowledgement
Amy McMillan	Pending Acknowledgement
Patricia Welles	Pending Acknowledgement
Billy Kidd	Pending Acknowledgement
Sydney Murden	Pending Acknowledgement
Wendell Churchill	Pending Acknowledgement
Lionel Bishop	Pending Acknowledgement
Kyle Stearn	Pending Acknowledgement

Application Status VIEW COLOR MATRIX

Search

Name	Application Status
David Roberts	Pending Acceptance
April McMillan	Pending Acceptance
Patricia Wellen	Pending Acknowledgement
Sydney Murden	Pending Acceptance
Winston Churchill	Pending Acceptance

Once you select **Show Results** on the filter, only adults will appear in the Application Status view. Adults include Volunteer and Venturing Participants in the filter.

To open an application select the persons name from the list.

When you open an adult application you will see the **Application Summary** showing the basic personal information for the applicant. You can also view the invoice in this section of the application.

Troop 0003 Greensburg United Methodist Church

Application Summary

Patricia Wellen
Current Status: Pending Acceptance

Gender: Female
Date of Birth: Jul 23, 1963
Membership Term: Oct 1, 2018 - Dec 31, 2018

Phone: (469) 111 1111
Email: qa@scouting.org

APPLICATION ID: 3688 VIEW INVOICE

Application Notes

You can open the application by selecting the **Step** in the application.

Review Application Pending Acceptance

- 1 Basic Information COMPLETED
- 2 Background Information COMPLETED
- 3 Terms and Conditions COMPLETED
- 4 Checkout Summary COMPLETED
- 5 Payment Confirmation COMPLETED

[DOWNLOAD APPLICATION](#)

You are required to add a response to this applicant's background question explanations before proceeding.

REVIEW BACKGROUND RESPONSES

If an applicant has selected “yes” to any of the screening questions you will see a notice that you must review those answers and note your response before you can accept the applicant. **Select the red button** to review those questions.

If the applicant has not answered “yes” to any of the questions you will see the action buttons to accept the application.

You will need to acknowledge that you have read the explanations given for each of the screening questions to which they answered affirmatively clicking the checks next to each question.

ADDITIONAL INFORMATION

✓ Have you ever been arrested for a criminal offense (other than minor traffic violations)?
See above.

✓ Have you ever been removed from or asked to leave a leadership position in an organization due to allegations regarding your personal conduct or behavior?
Sometimes you have to fight for your right to party.

Type comment with reason

Type comment with reason

0/250

I ACKNOWLEDGE

You will also be asked to type in comments to show that you have discussed these questions with the applicant.

After you type your comments the **I Acknowledge** button will become active and you can submit your comment.

Once you have submitted your comment, an Acknowledgement note with your comment will appear in the dashboard.

Application Summary

Patty Smith
Current status: Pending Acceptance
Gender: Female
Date of Birth: Jan 1, 1979
Membership Term: Oct 1, 2018 - Dec 31, 2018
Phone: (248) 444 2475
Email: Patty@scouting.org

APPLICATION ID: 3152 VIEW INVOICE

Application Notes

ACKNOWLEDGEMENT NOTE
I called the applicant and talked with her about these items.

Type your note POST

The action buttons allow you to Accept, Reassign, Return to Applicant, or Do Not Accept will appear at the bottom of the application.

Review Application

1 Basic Information COMPLETED

2 Background Information COMPLETED

3 Terms and Conditions COMPLETED

4 Checkout Summary COMPLETED

5 Payment Confirmation COMPLETED

ADDITIONAL INFORMATION DOWNLOAD APPLICATION

ACCEPT REASSIGN RETURN APPLICATION DO NOT ACCEPT

In **Step 2** of the application, you will find the **References** section with the names and contact information for the applicant's references. You will want to contact the references to ensure that you want this adult as a leader in your unit.

Pack 0292 Greensburg United Methodist Church Application ID - 3152

2 Step 2: Background Information

Experience

Have you ever led a Scouting unit? No
 Are you an Eagle Scout? No
 Experience working with youth in other organizations None

Residency

Have you had different residencies over the last five years? No
 Current Memberships None

References

Name of Contact: Santa Claus
 Phone Number: (828) 444 - 2365

Additional Information

Review Application

1 Basic Information COMPLETED

2 Background Information COMPLETED

3 Terms and Conditions COMPLETED

4 Checklist Summary COMPLETED

5 Payment Confirmation COMPLETED

ADDITIONAL INFORMATION DOWNLOAD APPLICATION

ACCEPT REASSIGN RETURN APPLICATION DO NOT ACCEPT

After reviewing the application, if you still need more information you can either call the applicant directly or you can select **Return to Applicant** which will send the applicant a message that you need more information and will send them a link to return to their application.

RETURN APPLICATION

Enter instructions to return to the applicant

Type message here...

0/250

Send

When you select Return to Applicant, a message box will appear. Type your request in the space provided and an email will be sent to the applicant asking him/her to log into My.Scouting and go to My Applications to supply the needed information. Note: you must enter your message in one paragraph. Words typed in an additional paragraph will not appear in the box describing what is outstanding.

In MyApplication Dashboard the applicant sees "Provide Additional Information". A Pop-up will appear asking for the additional information.

?

Please Make the Following Changes:

Please give additional information about the incident in the screening questions.

Cancel OK

When they click “OK,” the screen to make the entry appears.

Name	Date Submitted	Application Status
Harley Davidson Crew 0303, Greensburg United Methodist Church Application# 4342	02 November 2018	Pending Applicant Response <small>Please give additional information about the incident in the screening questions.</small>

[WITHDRAW](#) [PROVIDE ADDITIONAL INFORMATION](#)

violations)?:

* Please provide more information:

I was using private property and the owner objected

* Has your driver's license ever been suspended or revoked?: Yes No [Update This Answer](#)

* Have you ever been investigated for, accused of, or charged with abuse or neglect of a minor child?: Yes No [Update This Answer](#)

* Are you aware of any reason not listed above that may call into question your suitability to supervise, guide, care for, and lead young people?: Yes No [Update This Answer](#)

Update References

* Please list an additional one to three references who are familiar with your character as it relates to working with youth, reference may be checked.

Fred Flintstone
phone: 664545-4645

+ Add

[Submit Changes For Review](#)

Review Application Pending acceptance

- 1 Basic Information COMPLETED
- 2 Background Information COMPLETED
- 3 Terms and Conditions COMPLETED
- 4 Checkout Summary COMPLETED
- 5 Payment Confirmation COMPLETED

[ADDITIONAL INFORMATION](#) [DOWNLOAD APPLICATION](#)

[ACCEPT](#) [REASSIGN](#) [RETURN APPLICATION](#) [DO NOT ACCEPT](#)

If you are ready to accept the adult, you can now choose the **Accept** Button.

Adults cannot be accepted by the unit until they finish their Youth Protection Training (YPT).

If they take the training online using their My.Scouting account, the record will automatically update when they have taken their training and you will see the YPT status in their record

Sandi Prucell
Current Status: Completed
YPT Status Active, Expires: 07-23-2022

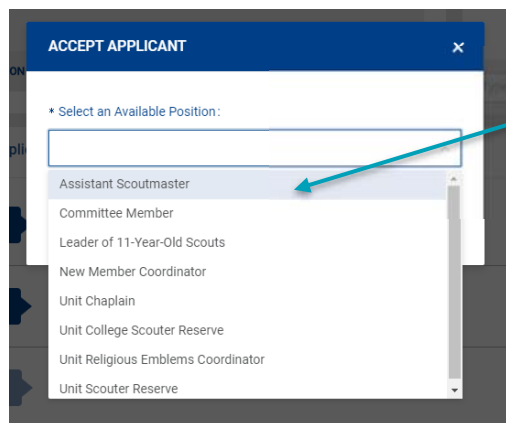
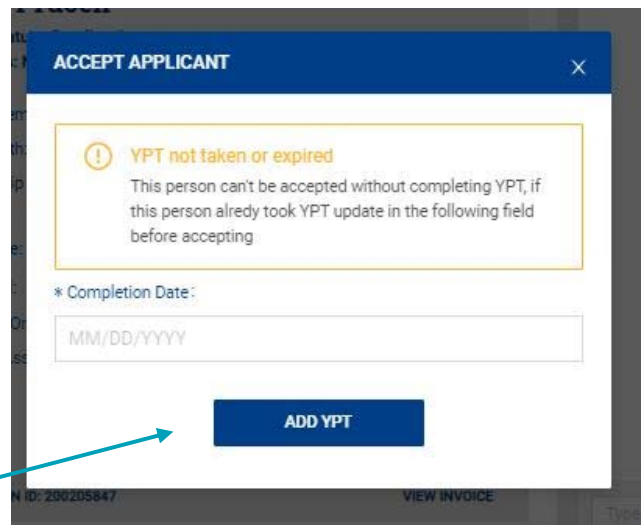
Gender : Female
Date of Birth: Jul 23
Membership Term: Jul 1, 2020 - Dec 31, 2020

Phone: (555) 555 5555
Email: Pat.wellen@scouting.org
Applied to Organization: Pack 3272
Currently Assigned to Organization: Pack 3272

APPLICATION ID: 200205847 [VIEW INVOICE](#)

If the applicant has not taken YPT the status will be incomplete and when you select ACCEPT, a pop up will ask you to verify that the person has completed YPT and will ask you for the date on the certificate of completion. YPT is required training, therefore, the applicant must show you proof the training has been completed and is current for the remainder of the charter.

Type in the completion date on the YPT certificate and then press **Add YPT**. The status on the application will update to complete.



Next, a list of available positions for the unit will be provided for selection. **Select the position** for which this applicant will serve. Press **Save**.

The applicant will move out of Pending Acceptance on your dashboard and will move to Completed status. They will also receive an automated Welcome email from the BSA and if your unit has chosen to send an automated welcome as well, that email will be sent within 24 hours of unit acceptance.



If you do not want to accept the adult, you can choose either **Reassign** or **Do Not Accept**.

REASSIGN APPLICANT

* Reassign Reason:

Select a reason for reassignment

Assign to district: Wapiti 25

SAVE

If you select **Reassign**:

- You will be asked to select a reason for the reassignment. Use the dropdown list to select a reason.
- The applicant will be reassigned to the district so that they can find another unit willing to take this volunteer.

REASSIGN APPLICANT

* Reassign Reason:

Select a reason for reassignment

- Not enough volunteer help
- Scheduling Conflicts
- Special Needs
- Too many members
- Other

DO NOT ACCEPT

By selecting this option, you are recommending to the Council that the applicant not be accepted into any Scouting unit.

The Council may contact you to clarify your reasoning for making this recommendation.

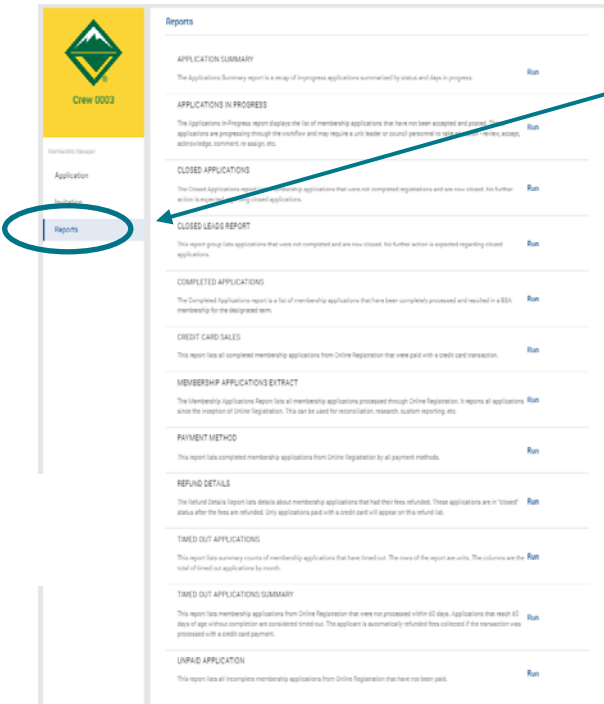
CONFIRM

If you select **Do Not Accept**:

- You will be asked to confirm you selection.
- The council may contact you to clarify why you are recommending that the applicant not be accepted into any Scouting unit.

Once your selection is made you will see the applicant move from Pending Acceptance into one of the other adult statuses you selected.

Reports



To view and download reports available through the system select **Reports** and you will see the list of available reports.

To view any of the reports, select **Run** on the right-hand side of the report description.

All reports will be in a spreadsheet format that can be downloaded into a CSV or PDF format by clicking on Export button at the top of the report. The resulting download will automatically open in Excel. The reports also have filtering capability by using the grouping feature that looks like a triangle located under the column heading. You can later remove the filter by choosing disable grouping in the dropdown and then clicking Refresh. The arrows below the heading also allow you to sort ascending or descending.

BOY SCOUTS OF AMERICA[®] Credit Card Sales Report

This roster information is to be used only for authorized purposes on behalf of the Boy Scouts of America. Disclosing, copying, or making any inappropriate use of this roster information is strictly prohibited.

Council Lincoln Heritage Council 205 [Export to CSV](#) [Export to PDF](#)
 Organization Name Crew 0003, Greensburg United Methodist Church
 Report Generated By
 Date Report Generated 11/03/2018

FILTER Group by: Disable Grouping [REFRESH](#) [RELOAD](#)
 Page 1 of 1 GO

Application ID	Application Type	Applicant Full Name	BSA Member ID	Parent/Guardian Full Name	Parent/Guardian Member ID	Phone Number	Email Address	Current Status	Current Status Date	Date Submitted	Date Accepted	Applied to Context	Applied to Org Type	CC Payment Date	Membership Amount	Boys' Life Amount	Adult Membership Amount	Adult Amount
3420	Traditional Adult	Spencer Davison	12757258			(243) 242 3434	debra.kendrew@scouting.org	Pending Review	10/30/2018 03:21 PM	10/11/2018 12:00 AM		Lincoln Heritage Council 205 / SERVICE AREA 1 SA01 / Wapiti 25	Crew	10/11/2018 04:53 PM	\$0.00	\$0.00	\$8.25	\$0.00
4241	Traditional Youth	Jessie Owens	12757954	Dale Curry	122169970	(270) 111 1111	debra.kendrew@scouting.org	Completed	10/27/2018 10:03 AM	10/27/2018 12:00 AM	10/27/2018 10:03 AM	Lincoln Heritage Council 205 / SERVICE AREA 1 SA01 / Wapiti 25	Crew	10/27/2018 10:01 AM	\$0.00	\$0.00	\$8.25	\$3.00
4839	Traditional 18 to 21	Betty Ruble	12758648			(232) 131 4141	debra.kendrew@scouting.org	Pending Acceptance	11/03/2018 10:44 AM	11/03/2018 12:00 AM		Lincoln Heritage Council 205 / SERVICE AREA 1 SA01 / Wapiti 25	Crew	11/03/2018 10:44 AM	\$0.00	\$0.00	\$5.50	\$2.00
4840	Traditional Youth	Jayson McDonald	12758649	Betty Ruble	12758648	(854) 646 4654	debra.kendrew@scouting.org	Pending Acceptance	11/03/2018 10:56 AM	11/03/2018 12:00 AM		Lincoln Heritage Council 205 / SERVICE AREA 1 SA01 / Wapiti 25	Crew	11/03/2018 10:56 AM	\$0.00	\$0.00	\$5.50	\$2.00

NOTIFICATIONS

The system sends the Unit Key 3 and the New Member Coordinator email notifications so that they can act on inquiries and applications in the system. If a Lead is pending action an email will be received on Mondays and Thursdays. If an application needs action an email will be distributed on Tuesdays and Fridays.