



Online Registration

UNIT GUIDEBOOK

November, 2018

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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 an online credit card payment option or a cash/check option.
3. The Application Manager:
 - Collects completed applications from new youth and adults; *
 - 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 (CR) 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 non-paying adult positions, position changes in the same unit, 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 14),
- 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 anyone under 18 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.)

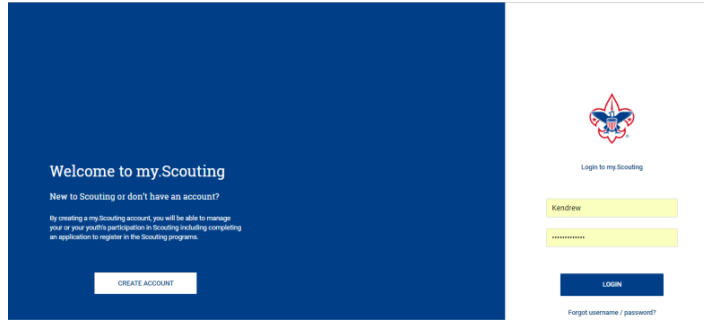
Invitation Manager is also connected to [BeAScout](#), an internet-based tool that parents can use to find a unit in their area. So, families who want to join Scouting can also find your unit there to send in requests for more information or apply directly and complete an application and pay online so 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 (if the unit has turned on that setting) or by check or cash 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.
- The Chartered Organization Representative can also accept or reject new adult applications that night.
- 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 TOOLS PROFILE

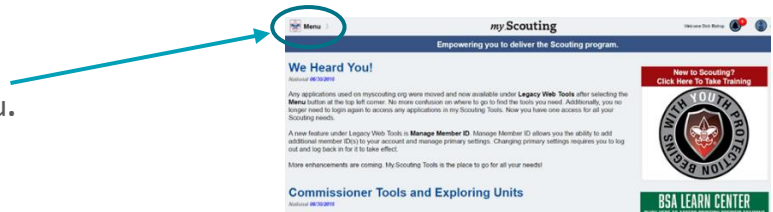
Updating your My.Scouting profile is an essential step to ensuring that you receive the notifications from Invitation Manager or Application Manager showing what actions you must take.



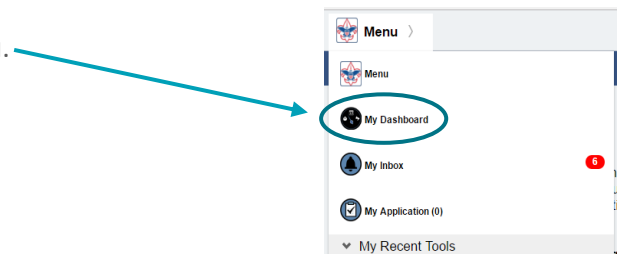
Step 1. Go to my.scouting.org and log in.

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

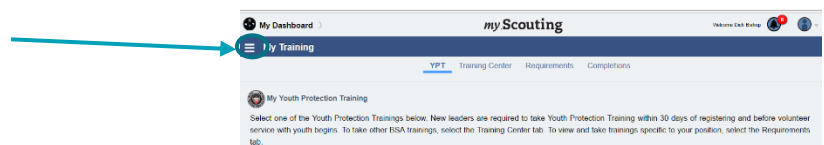
Step 2. Select **Menu** to get a drop down menu.



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

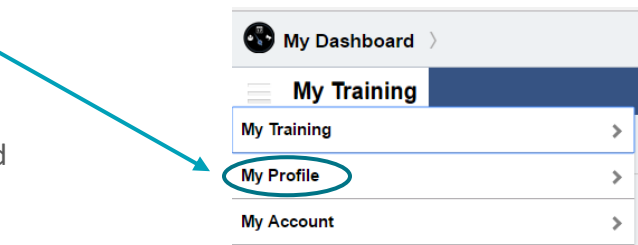


Step 4. System defaults to My Training. Click the **pancake symbol** next to My Training.

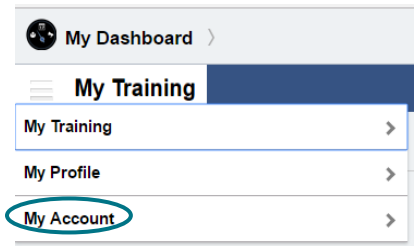
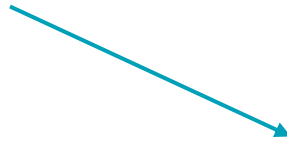


Step 5: Select **My Profile** from the dropdown menu.

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.



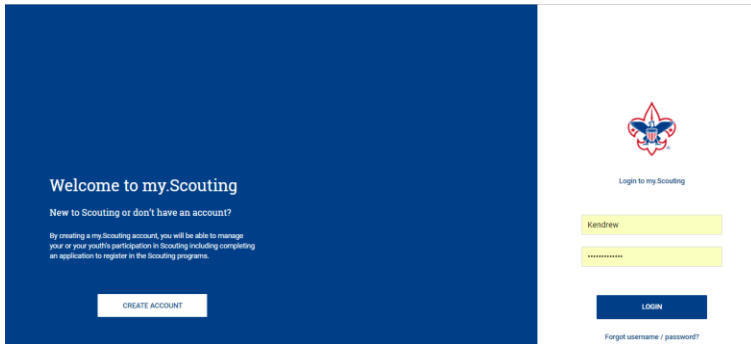
Step 6. To change your password and/or update security questions, click the pancake symbol and select **My Account** from the dropdown menu.



SETTING UP YOUR UNITS BEASCOUT PIN

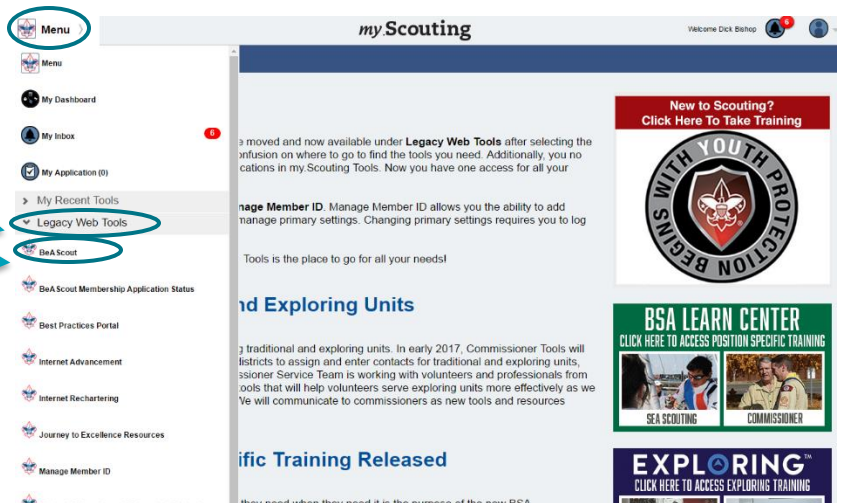
BeAScout is an online site that prospective members can use to find a unit near them. To prepare for your **My.Scouting Tools Online Registration** go-live, please verify that your BeAScout pin is turned on and that the contact information is current and displays the information you want shown for your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

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



Step 2: Go to BeAScout tools

- Select **Menu**
- Select **Legacy Web Tools**
- Select **BeAScout**



Step 3: Update your Unit Information

- Select the **Unit Pin Management** tab to enter information you want a prospective Scouting family to see when they select your unit's pin on the BeAScout map.
- If your unit is not listed in the **Unit Description** box, use the drop-down menu to select your unit.
- Change your Unit Pin Mode to Unit** so that applications or requests for information will come directly to your unit Invitation Manager or Application Manager.

- Change your Pin Status to Active** so that your unit location shows on BeAScout.
- Set your Apply Status to Active** so that the "Apply Now" button displays on your units BeAScout pin.
- Enter your unit's web address** in the Unit Web Site box.
- 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. However, if the lead completed the request for more information form this data will appear in Invitation Manager and be actionable by the Unit Key 3.

H. **Check your unit meeting address** and correct if needed. It will default to your Chartered Organization address.

- We recommend listing the address where the unit meetings take place.

I. **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.

J. **Select the fields to display on the unit pin.** Click on the boxes next to the fields that you wish to display. The fields will show in the Unit Pin Preview to the right. Once you have the pin showing the information you want save your work.

BOY SCOUTS OF AMERICA.

Unit Pin Management | Unit Lead Management | Membership Application Management

Unit Pin Management

Unit Description : Crew 0425 National Council BSA
 Unit Pin Mode : Unit Pin Status : Active Apply Status : Active
 Unit : Alternate Unit Description : Unit Web Site : www.crew425.com

Primary Contact Information

Primary Contact Person :
 First Name :
 Last Name :
 E-mail :
 Phone Number :

Unit Meeting Address

Address 1 : Boy Scouts of America
 Address 2 : 1325 W Walnut Hill Lane
 City : Irving
 State : TEXAS
 ZIP Code : 75038
 Latitude : 32.8859664
 Longitude : -96.9702699

Fields Displayed On Unit Pin

Unit Description Unit Meeting Address
 Alternate Unit Description Phone Number
 Unit Web Site Additional Unit Information
 Show Unit Information in Lead E-Mail

Additional Unit Information

Crew 425 meets on the second and fourth Thursday of each month at 7:00 pm. Check out our website for a calendar of upcoming activities.
 5 Characters left

NOTE: If Council information is selected, all e-mail notification shall be sent to the council e-mail address defined in BackScout Administration.

* Required fields

Save Cancel

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BOY SCOUTS OF AMERICA.

Unit Pin Management | Unit Lead Management | Membership Application Management

Unit Pin Management

Unit Description : Crew 0425 National Council BSA
 Unit Pin Mode : Unit Pin Status : Active Apply Status : Active
 Unit : Alternate Unit Description : Unit Web Site : www.crew425.com

Primary Contact Information

Primary Contact Person :
 First Name :
 Last Name :
 E-mail :
 Phone Number :

Unit Meeting Address

Address 1 : Boy Scouts of America
 Address 2 : 1325 W Walnut Hill Lane
 City : Irving
 State : TEXAS
 ZIP Code : 75038
 Latitude : 32.8859664
 Longitude : -96.9702699

Fields Displayed On Unit Pin

Unit Description Unit Meeting Address
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Crew 425 meets on the second and fourth Thursday of each month at 7:00 pm. Check out our website for a calendar of upcoming activities.
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* Required fields

Save Cancel

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SAVE ALL CHANGES – you should get a message showing that your changes were successfully saved.

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:

- **Payment options** – credit and cash (Your council can choose to override this configuration and require cash only or credit cards only. If the council has selected to override this configuration you will not see the drop-down box in your configuration options.)
- **Committee Chair recommendation for adult positions** – the Chartered Organization Representative (CR) is the only person in the unit who is authorized to assign positions and accept adults in accordance with the BSA Bylaws. 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, if so you will not see the drop-down box in your configuration options.
- **Unit Fee Message** – only the national registration fee and Boys’ Life subscription fee 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 Chief Scout Executive when a youth or adult is accepted by the unit. This configuration sends an automated welcome message from the unit the day after the Chief’s 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 right now. 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.

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: Select the **Settings** tab.

The image shows two screenshots of the My.Scouting web interface. The top screenshot displays the main dashboard with a left-hand navigation menu. The 'Menu' button at the top left is circled in blue. Below it, the 'Troop 0144 - West District 08' option is also circled in blue. The 'Organization Manager' option is circled in blue. The bottom screenshot shows the 'Organization Manager' page for '0144 (Flora Rotary International)'. The 'Settings' tab is circled in blue. The page displays organization details for 'FLORA ROTARY INTERNATIONAL', including effective and expiration dates, executive officer information, and social media links.

myScouting Empowering you to deliver the Scouting program.

Tools and Exploring Units

Recently serving traditional and exploring units. In early 2017, Commissioner Tools will be available to all units. We will communicate to commissioners as new tools and resources are developed.

Specific Training Released

Content they need when they need it is the purpose of the new BSA Learning Center. It has been added to the learn center consisting of 14 e-learning modules. It is designed to help youth officers, building a crew budget and annual program planning, and to complete position specific training online.

Each learning plan is designed for the specific position taken before the first meeting, within the first 30 days, and within 90 days. The learning plan is designed to be completed by the youth officers and their wing volunteers to complete their training at their own pace.

On the Dashboard, My Training, or, click the Position Specific Training image on the right.

New to Scouting?
Click Here To Take Training

BSA LEARN CENTER
CLICK HERE TO ACCESS POSITION SPECIFIC TRAINING

EXPLORING
CLICK HERE TO ACCESS EXPLORING TRAINING

Organization Manager

myScouting Settings

0144 (Flora Rotary International)

FLORA ROTARY INTERNATIONAL Chartered Organization

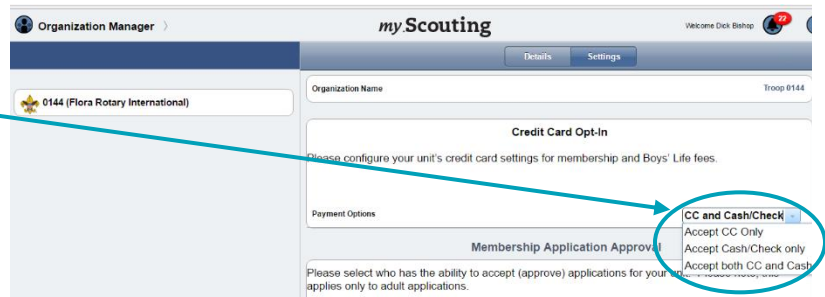
Effective Date: 01/01/2011
Expiration Date: 12/31/2011

Executive Officer (EO): Dick N Bishop
Chartered Organization Rep. (CR): Dick N Bishop
Email: olhanks@scouting.org

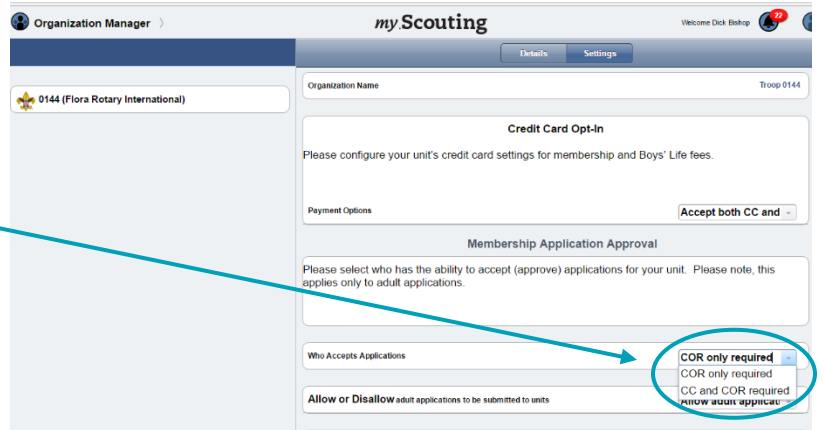
Social Media Guidelines

Step 5: Set configurations:

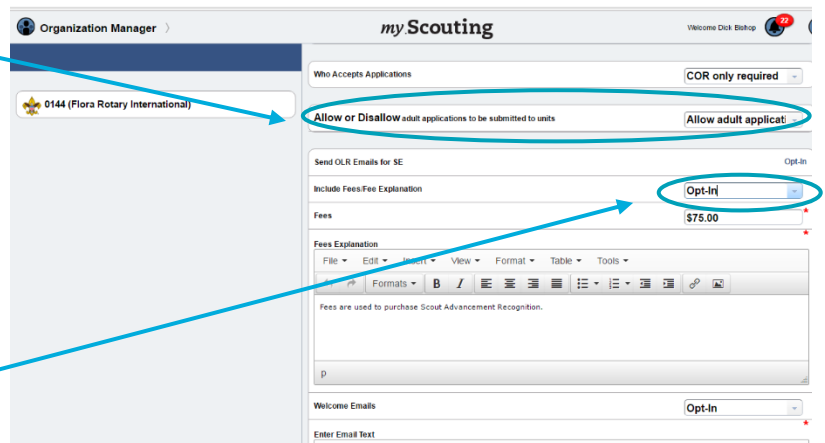
- **Payment options:** Select the payment option your unit wishes to use from the drop-down list. (If this is not available the council has selected to override this configuration). Default is "Accept cash/checks only."



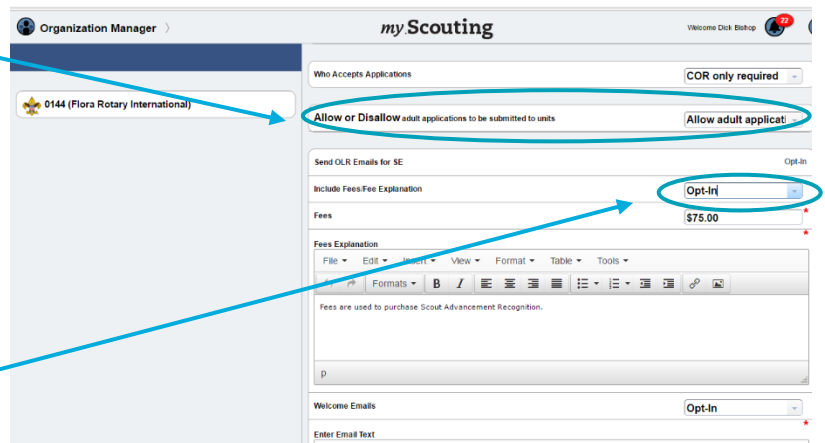
- **CC Recommendation:** Select whether you want the CC to recommend adult positions. Default is CR only.



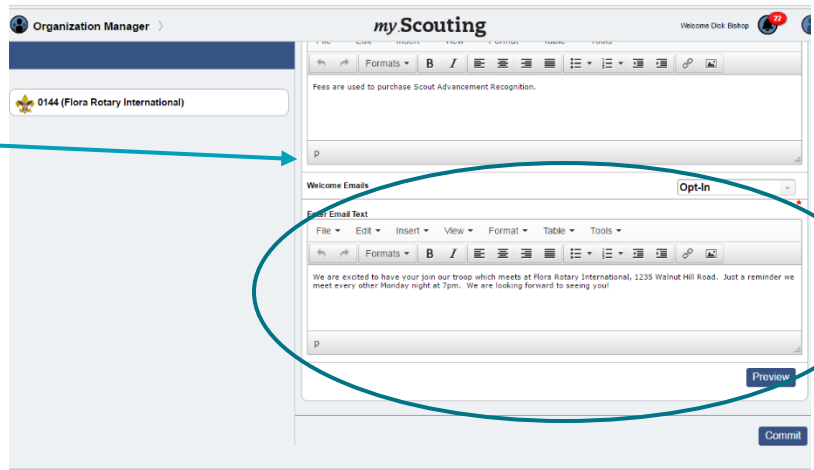
- **Adult Application Availability:** If you want to turn off adult application availability change that setting. (If this is not available the council has elected to configure this option for all units.) Default is to accept adult applications.



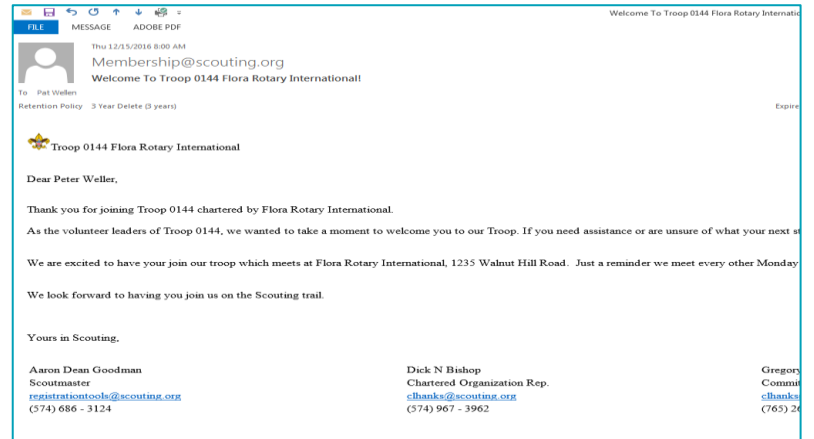
- **Unit Fee Message:** If you would like to display a message about additional unit fees, select opt in and type in the fee amount and a message about what the fee covers. Default is opt-out.



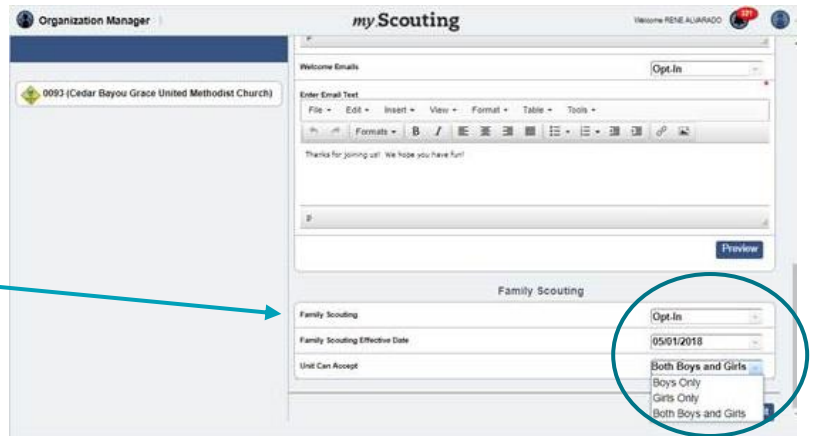
- Automated Welcome Email:** If you would like an automated welcome email from your unit to be sent upon acceptance of an application **select opt-in** and type your message in the space provided. Opt-out is the default.




Example of Welcome Email



- Family Scouting:** If your pack will be accepting girls – select opt-in for Family Scouting, enter the date, and then select whether the unit is accepting boys only, girls only, or both boys and girls.



The BeAScout unit pin will show pins similar to the following depending on your choice.

 **Pack 0510 Irving North Christian Church** 2.9 miles

2901 N MacArthur Blvd Irving TX 75062


Contact: Jody Agosta
Email: incochurchoffice@yahoo.com

Dens for Boys or Girls

Online Registration available for this unit.

Weekly meetings during the school year on Sunday or Thursday nights. We love to camp and all things outdoors.

[Request More Information](#) [APPLY NOW](#)

 **Pack 0850 Holy Trinity Catholic School** 6.2 miles

3750 William D Tate Ave Grapevine TX 76051

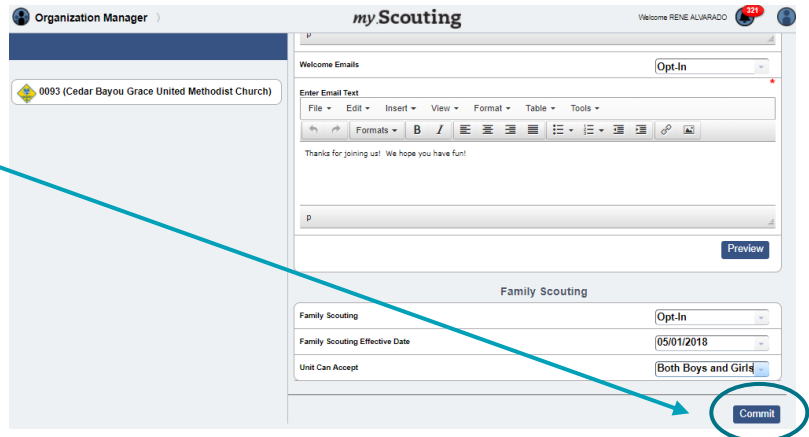
Contact: John Ringo
Website: <http://www.pack-850.org>

Boy Pack

Cub Scout Pack 850 has proudly served our Charter Organization, Holy Trinity Catholic School, and Northeast Tarrant County for over 15 years

[Request More Information](#)

Step 6: Save your selections by selecting **Commit** at the bottom of your screen.



Organization Manager | myScouting | Welcome RENE ALVARADO

0093 (Cedar Bayou Grace United Methodist Church)

Welcome Emails: Opt-In

Enter Email Text

File Edit Insert View Format Table Tools

Formats B / [Icons]

Thanks for joining us! We hope you have fun!

Preview

Family Scouting

Family Scouting: Opt-In

Family Scouting Effective Date: 05/01/2018

Unit Can Accept: Both Boys and Girls

Commit

ASSIGNING REGISTRATION INQUIRY 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.

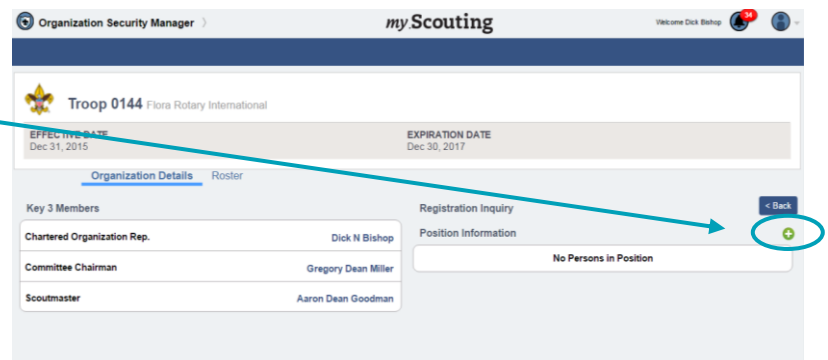
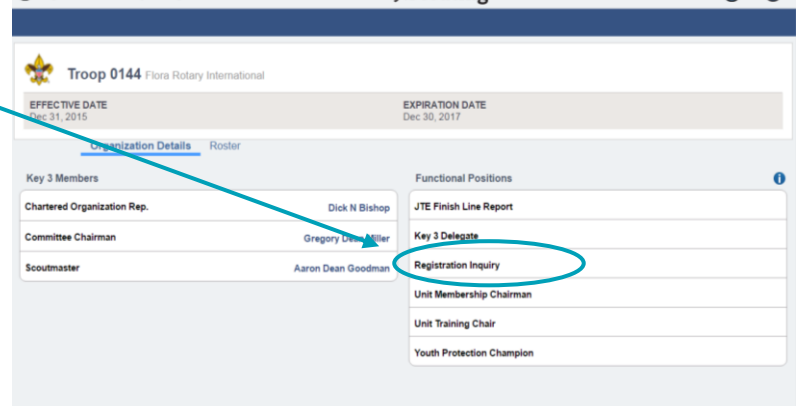
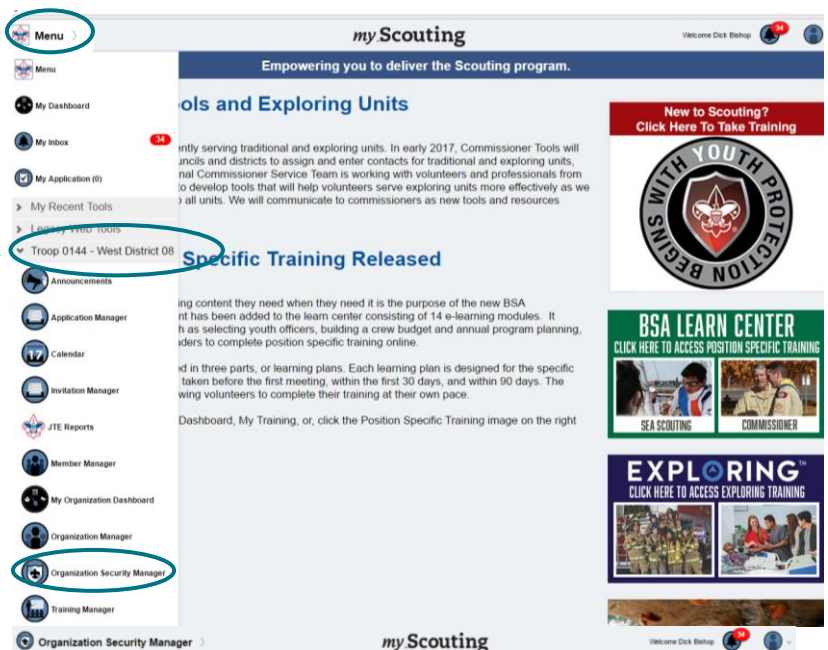
Step 1: While logged in to your My.Scouting account, select **Menu** at the top left-hand side of your screen.

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**.

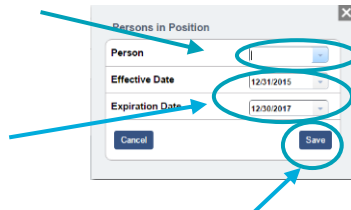
Step 4: Select **Registration Inquiry**.

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.

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:

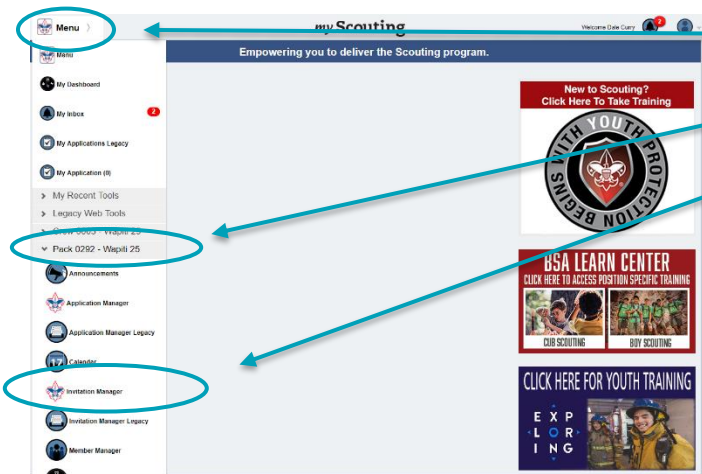
- Chartered organization representative (CR)*
- Committee chair (CC)*
- Unit leader (Cubmaster, Scoutmaster, Crew Advisor, Skipper, Coach)*
- Institutional Head/Chartered Organization Executive Officer (IH)
- New Unit Coordinator

* = 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

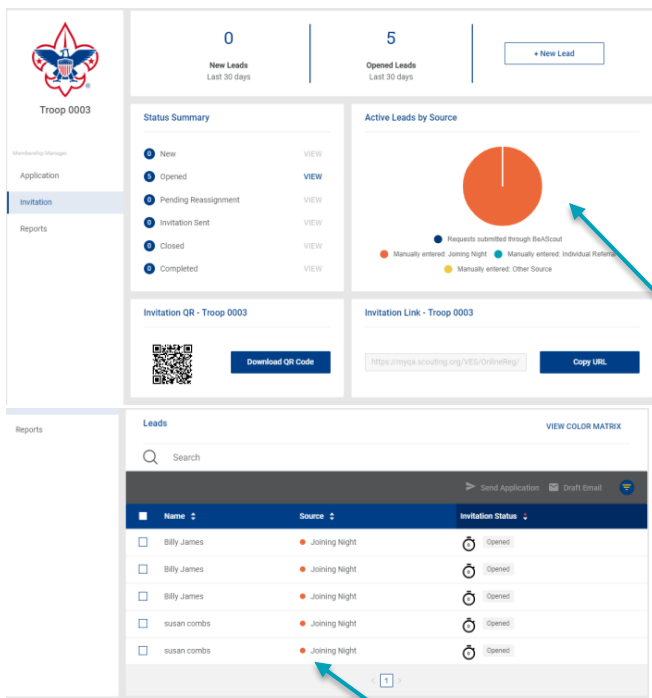
To view and act on an inquiry that has been submitted to your unit, you’ll want to log in to my.scouting.org.



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.

The pie chart may be empty (or dark blue) when you first access this tool, but in this example, we'll identify what each colored section means.

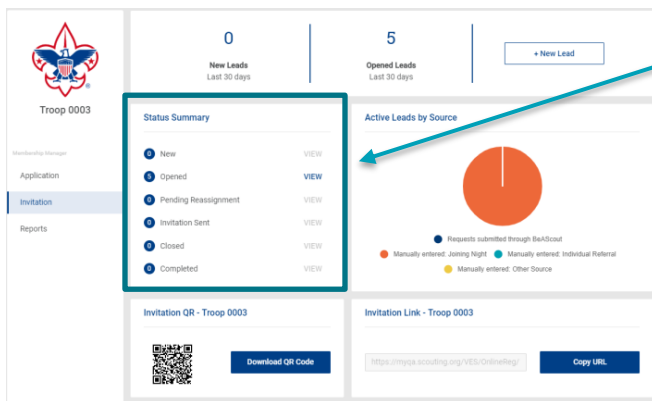
Hovering over each color in the pie chart displays the number of active requests in that category.

- **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.

Name	Source	Invitation Status
Billy James	Joining Night	Opened
Billy James	Joining Night	Opened
Billy James	Joining Night	Opened
susan combs	Joining Night	Opened
susan combs	Joining Night	Opened

- The default for the bottom LEADS section is to display New & Opened requests, those in Pending Reassignment and those for which an Invitation was sent. But Closed and Completed leads can be added by clicking on the filter function on the grey ribbon.
- Those awaiting action the longest will appear at the top.



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 it was manually closed by the unit.
- **Completed** - an invitation has been sent and opened and the person has initiated an online application.

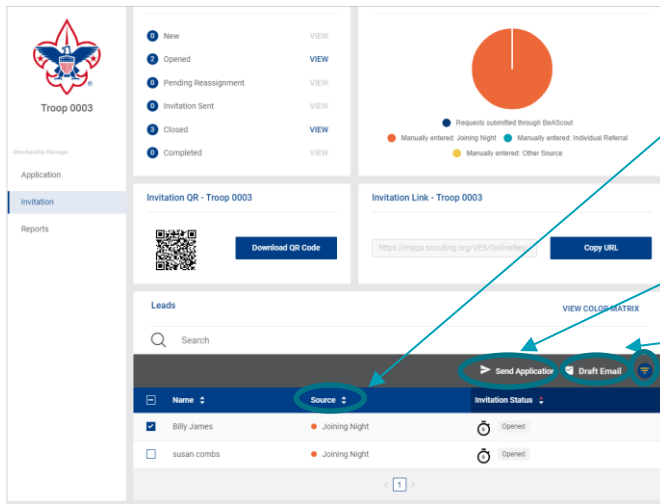
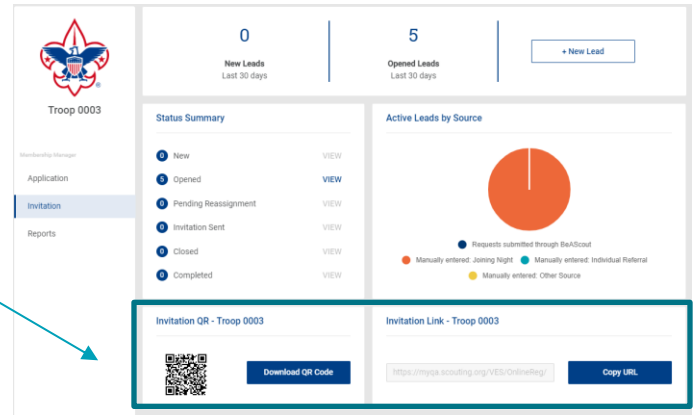
If an invitation is not sent within 60 days, the lead will go to Closed status and no longer show in Leads.

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.

PROCESSING LEADS

To access the URL or QR code select the URL or QR code button. When you press the button, it will automatically save it as a temporary copy. Just go to the document you wish to paste it in and select paste.

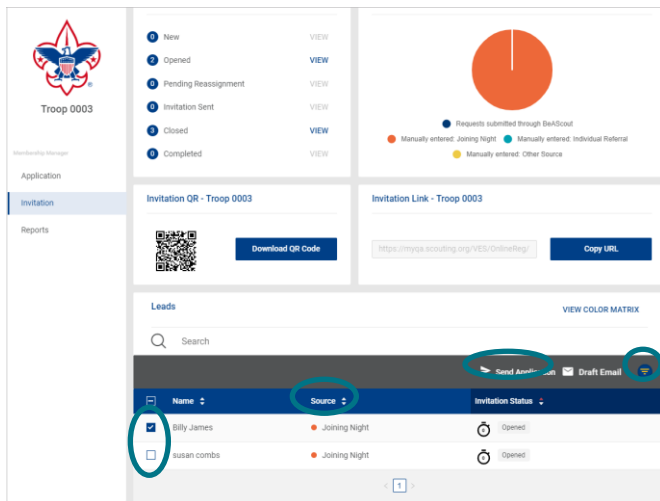
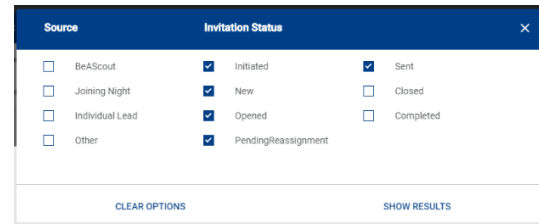


The **Source** column allows you to sort the Leads by the source through which they were received. This allows you to process from specific sources easily.

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.

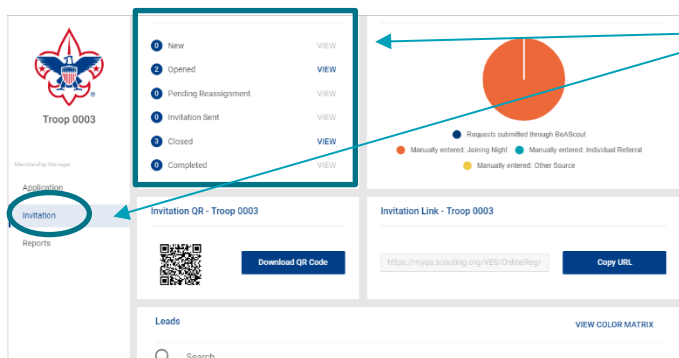
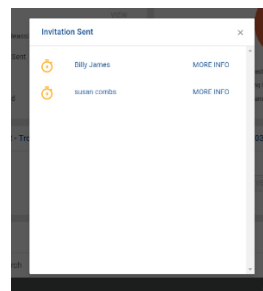
The **Filter** icon allows you to filter this list by:



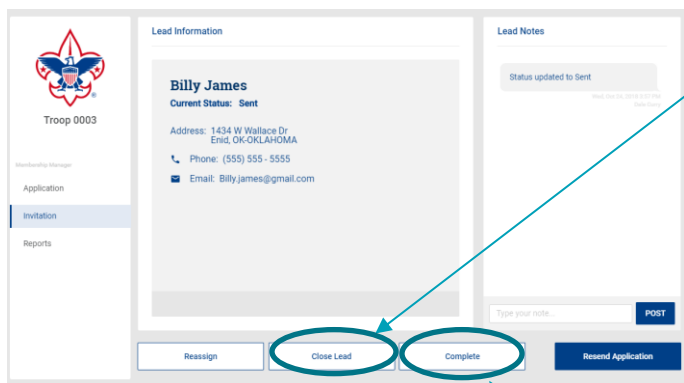
EXAMPLE: If you have a joining night and you want to send the application to everyone attending that night...

- 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:

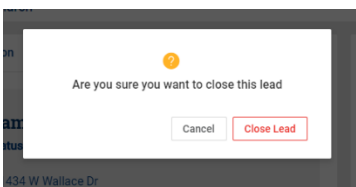
- You already have a paper application for this lead.
- You have talked with the person and they no longer want to join your unit.

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.

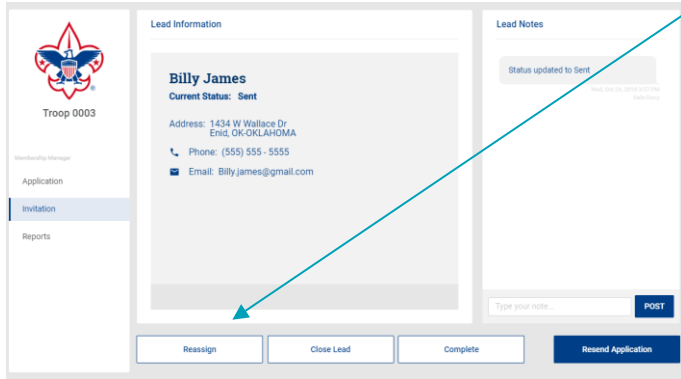
To Close a Lead:

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:

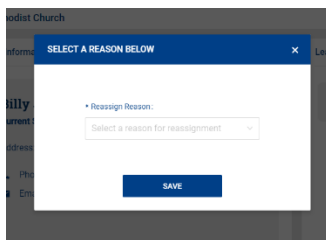
After you receive a completed application from the lead you should go back to the lead and indicate it is complete to clear it from your lead list.



Reassign the Lead:

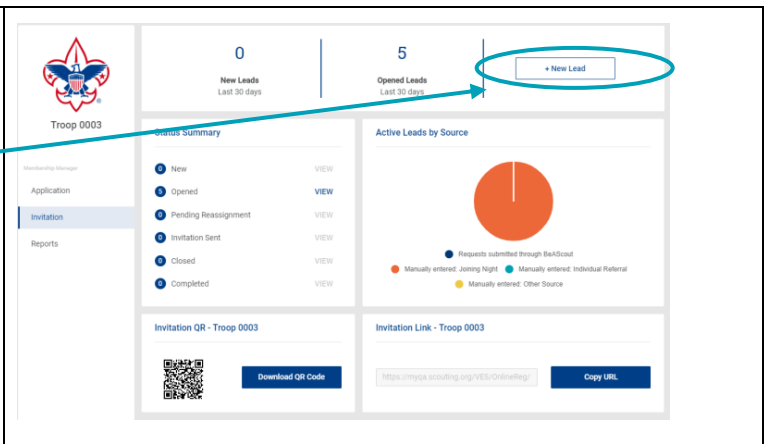
Select the reassign lead button if the application needs to be reassigned to another unit.

- The request is moved to the District's dashboard so that they can find another unit to take the request.
- You will be prompted to select a reason as to why the request is being reassigned.
- The request will be placed in the Pending Reassignment category under your By Status tab. This helps in the event the requestor contacts you to follow up on their inquiry.
- Once the District takes an action to reassign the request to a different unit, the request will be removed from your Pending Reassignment.



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.

Step 3: Enter information in each required field.

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.

Step 5: Send Application.

Lead Source

* Lead Source:

Parent / Guardian / Volunteer Information

* First Name:

* Last Name:

Suffix:

* Email Address:

* Phone Number:

Country:

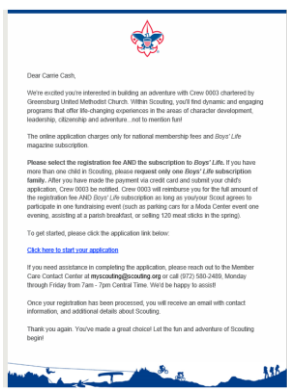
Address Line 1:

Address Line 2:

City:

State/Region:

ZIP Code:



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.

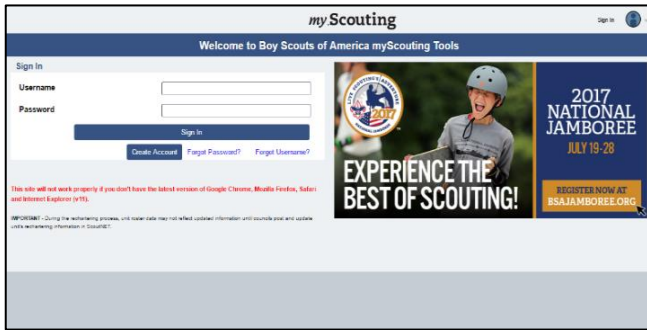
Unit Position	Actions
Chartered organization representative (CR)*	<ul style="list-style-type: none"> Review and accept or reject unit's adult leader applications. This is the only role that can accept or reject adult applications. Reviews and accepts or rejects unit's Venturing adult participant applications. Can review and accept or reject unit's youth applications (shared unit Key 3 role.)
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:

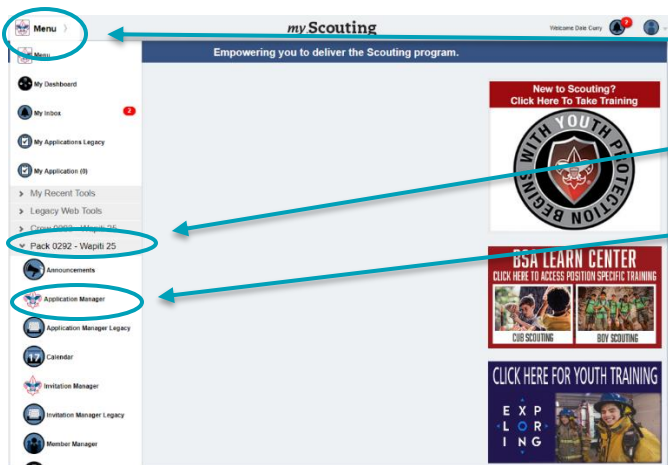
- New Member Coordinator and
- Registration Inquiry (go to page 13 for instructions on assigning this functional role.)

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.

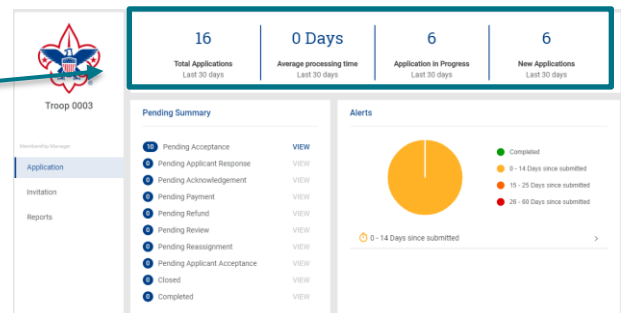


- Select **Menu**.
- Select your **unit name** in the dropdown list.
- Select **Application Manager**.

Application Manager Dashboard Overview

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

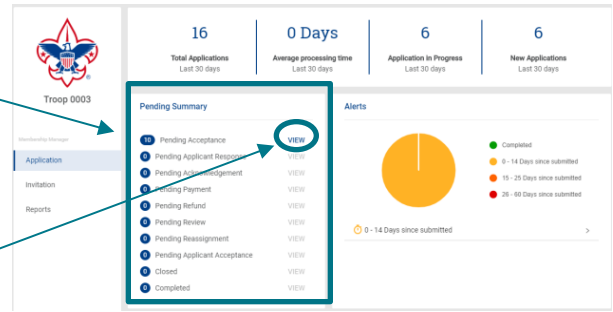
The application is tracked through the system for 60 days, after which the application is timed out and removed from the list. That is why the view is always of the last 60 days. This is to encourage units to take timely action.



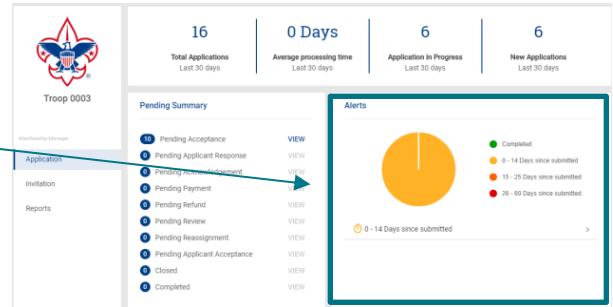
The **Summary** section of the dashboard contains a list of the different statuses that the applications can be in depending on the actions you have taken.

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.

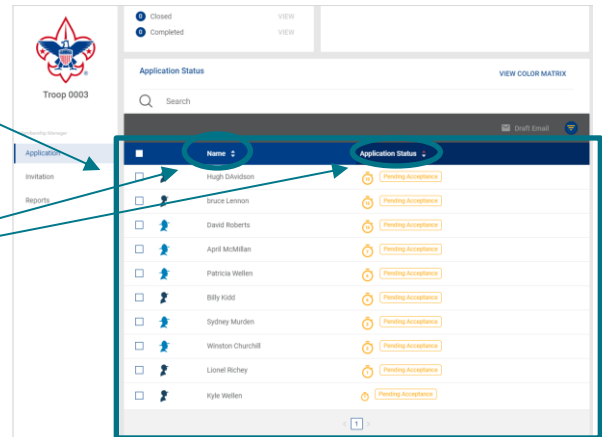


The **Alerts** section of the dashboard shows you how long applications have been pending since they were first submitted.

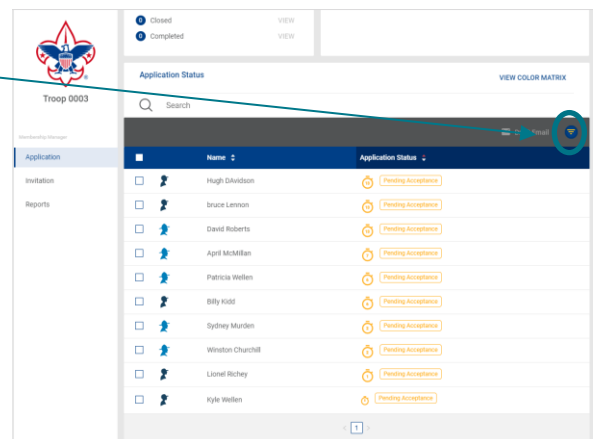
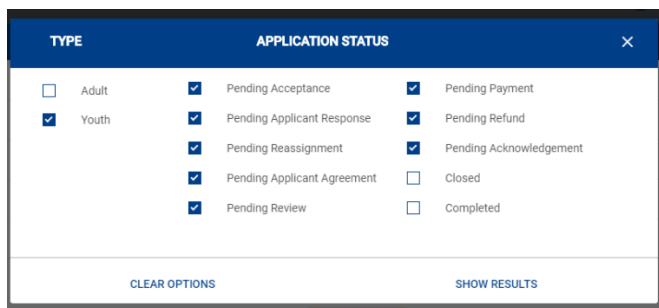


The **Applicants List** is at the bottom of the dashboard. This list contains the applications that have not completed processing. When you first open the dashboard, the list will display the applicants who have been in the queue to longest.

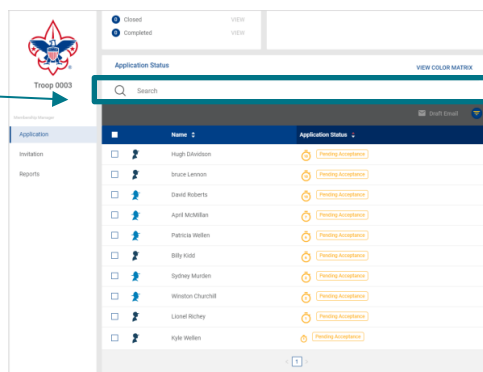
Applications can be sorted by name and application status by using the arrows next to each column name.



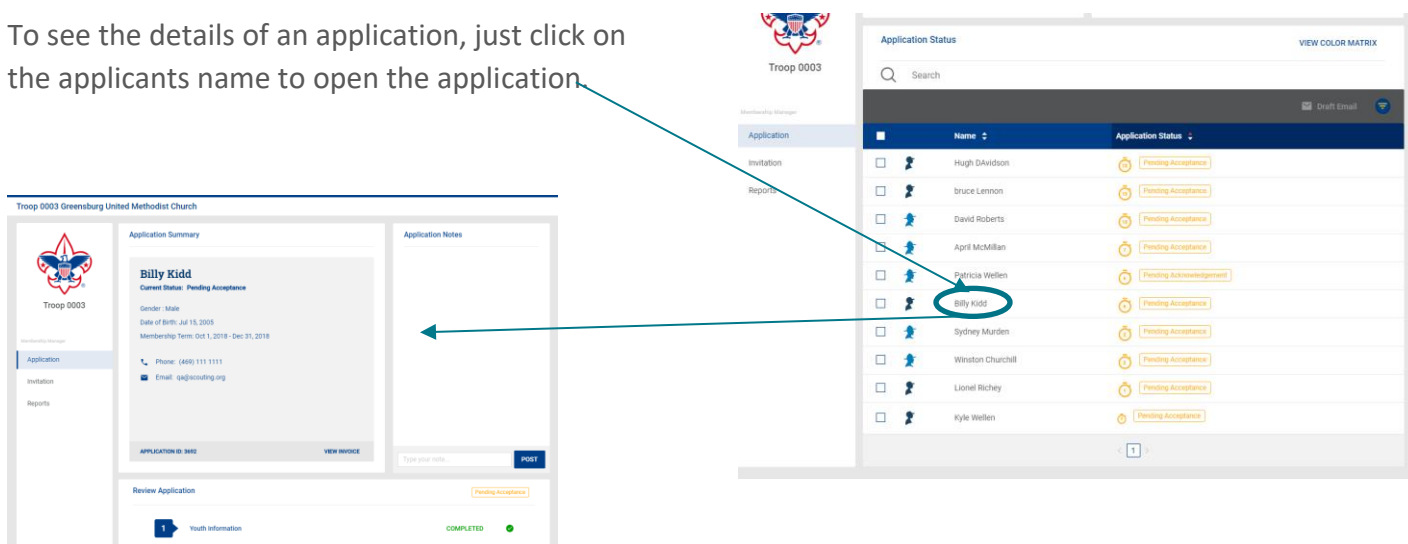
You can also **Filter** applicants by:



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



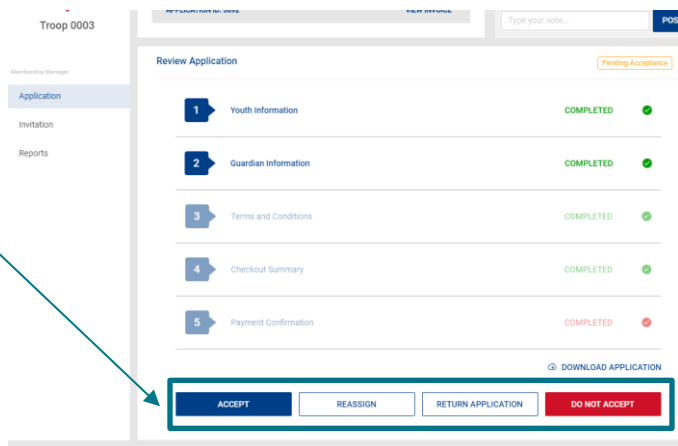
To see the details of an application, just click on the applicants name to open the application.



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.

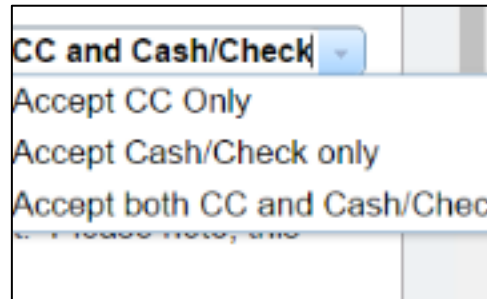


UNDERSTANDING PAYMENT OPTIONS

Payment options were set up by your unit Key 3 or the council as part of the system configurations. Options that were available include:

- Credit card only
- Cash/check only
- Both Credit and Cash/check

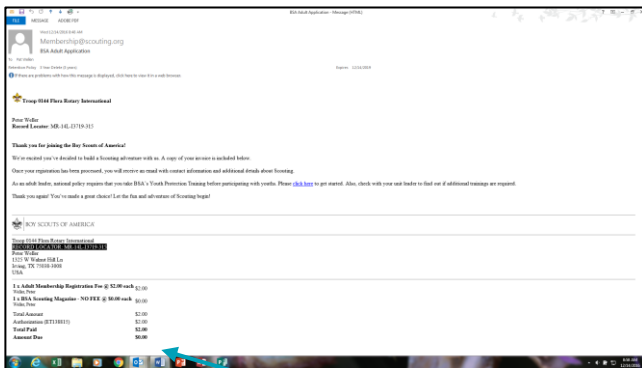
Your unit Key 3 can tell you which options your unit or council has chosen. If nothing was chosen, the system will default to accept cash/check only.



Pro-rated fees collected through online registration include only:

- Registration fees
- Boys' Life subscription fees

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 the invoice an adult receives upon submitting their application. You will see that this person has **paid by credit card** and shows a balance of \$0.00. 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.

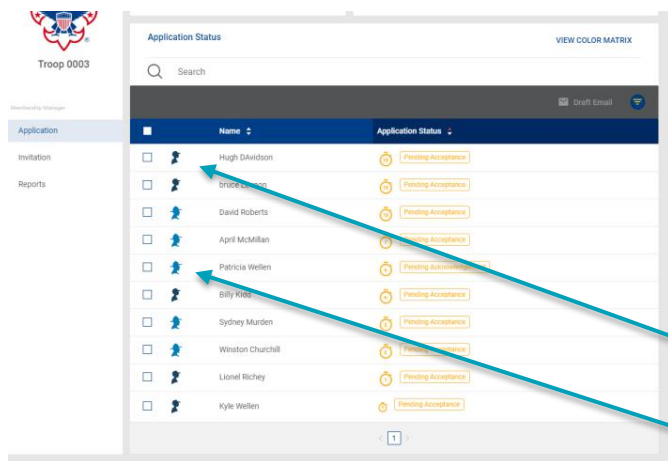
If the applicant chose the option of **paying by cash/check** the invoice will show an amount due. This is the amount the unit must collect from the applicant along with a copy of the email or invoice with the record locator.

UPDATE with Invoice showing amount due

RECEIPT	
Application ID:	4841
Transaction Date:	November 3, 2018 11:22 AM
Unit:	Crew 0003 Greensburg United Methodist Church
Boys' Life Domestic Rates	\$2.00
BSA Youth Registration (Trad.)	\$5.50
Total Amount:	7.50

The invoice must be turned in to the council along with the funds so that the council registrar can complete the payment process using the record locator found on the invoice.

PROCESSING YOUTH APPLICATIONS

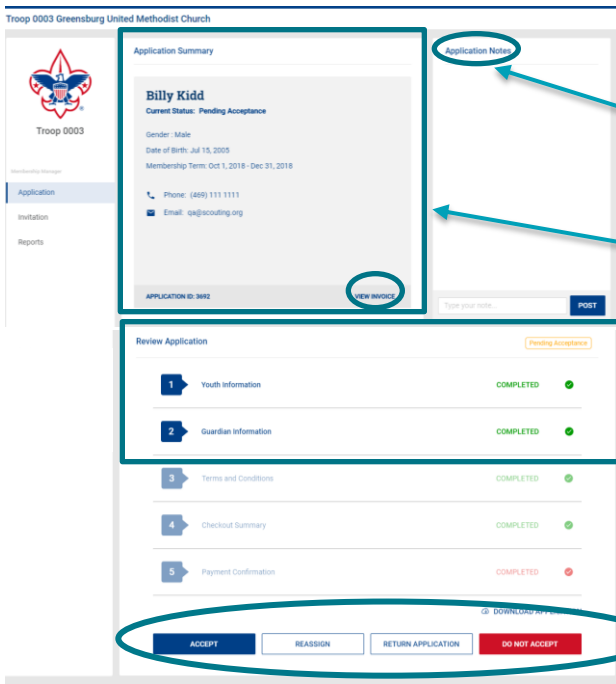


The position primarily responsible for accepting youth applications is the Unit Leader (Cubmaster, Scoutmaster, Coach, Venturing Advisor, Skipper); however, the Committee Chair and the Chartered Organization Representative can also accept youth applications.

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

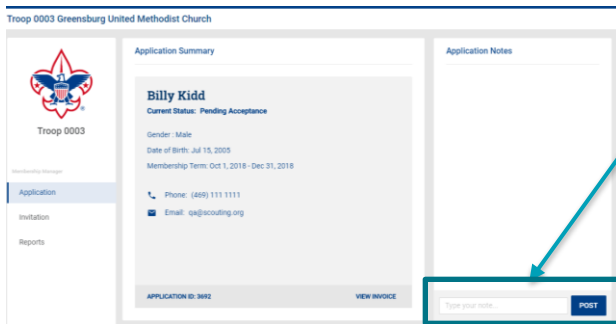


Click on the name of the youth applicant to open the application.



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.

Troop 0003 Greensburg United Methodist Church Application ID - 3692

Application Details

Application ID	3692
Parent / Guardian Member ID	118646543
Applicant Member ID	12757478
Applied To Organization	D89F9306-432D-4CC5-9016-52C81FE919E5
Submitted Date	2018-10-18
Current Status	Pending Acceptance

1 Step 1: Youth Information

Tell Us About Your Child

First Name	Billy
Last Name	Kidd
Date of Birth	2005-07-15
Gender	M
Ethnic Background	Caucasian/White
Grade	Ninth Grade

Youth Address Information

Country	USA
Address Line 1	1325 W Walnut Hill Ln
City	Irving
State / Region	TX-TEXAS
Zip	75038

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.

Review Application Pending Acceptance

1 Youth Information	COMPLETED
2 Guardian Information	COMPLETED
3 Terms and Conditions	COMPLETED
4 Checkout Summary	COMPLETED
5 Payment Confirmation	COMPLETED

DOWNLOAD APPLICATION

ACCEPT REASSIGN RETURN APPLICATION DO NOT ACCEPT

When you accept an applicant:

If the new member has already paid their fees online, 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 the new member has not paid their fees online, they will be moved to **Pending Payment** on the **Summary** section of the application dashboard and they will continue to show up on your daily summary.

Troop 0003 Greensburg United Methodist Church

16 Total Applications Last 30 days | 0 Days Average processing time Last 30 days | 7 Application In Progress Last 30 days

Pending Summary

1 Pending Acceptance	VIEW
1 Pending Applicant Response	VIEW
1 Pending Acknowledgment	VIEW
1 Pending Payment	VIEW
0 Pending Renewal	VIEW
0 Pending Review	VIEW
1 Pending Reassignment	VIEW
0 Pending Applicant Acceptance	VIEW
0 Closed	VIEW
0 Completed	VIEW

Alerts

0 - 14 Days since submitted

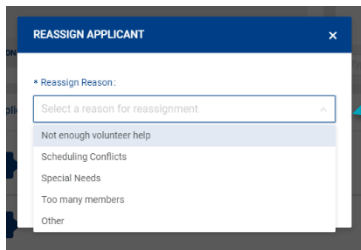
- You will need to follow up with the family and get their invoice and payment. The invoice has their application id.
- Turn in the invoice and the registration fee that is stated on the invoice to the council so that the registrar can post the payment and finish the registration process. **(The unit cannot prorate or change the fee on the invoice.)**
- If the family does not turn in the invoice, you can print it by going to Payment

Pending and selecting the applicant name and then invoice.

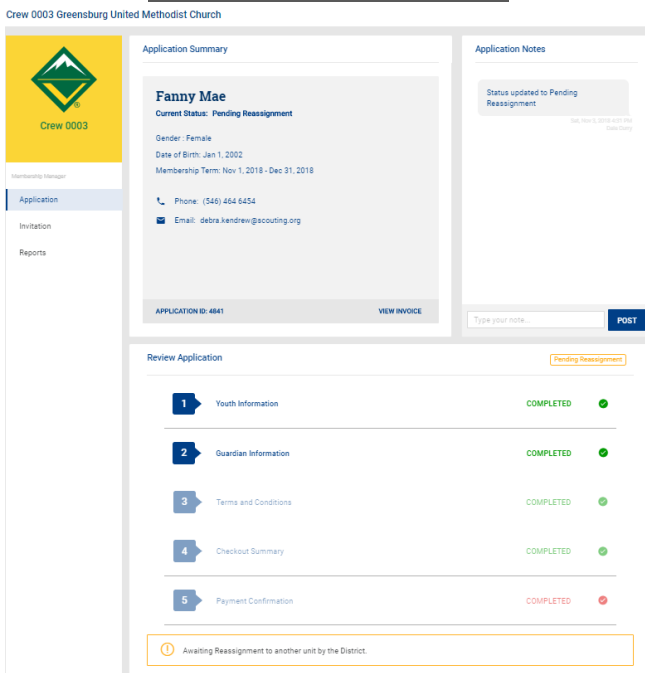
It is important to point out that the 60-day clock for processing an application does not reset, it just continues. So, you need to follow up on receiving the payment before this clock stops at 60 days.



If you receive an application, and your dens have too many boys and you cannot create another den, or if the applicant decides 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.



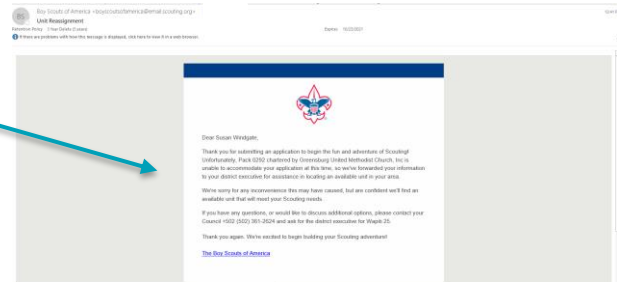
Select a reason for the reassignment request from the list provided. This will be used for reporting purposes.



Pending Summary		
2	Pending Acceptance	VIEW
0	Pending Applicant Response	VIEW
1	Pending Acknowledgement	VIEW
2	Pending Payment	VIEW
0	Pending Refund	VIEW
1	Pending Review	VIEW
1	Pending Reassignment	VIEW
0	Pending Applicant Agreement	VIEW
0	Closed	VIEW
1	Completed	VIEW

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.

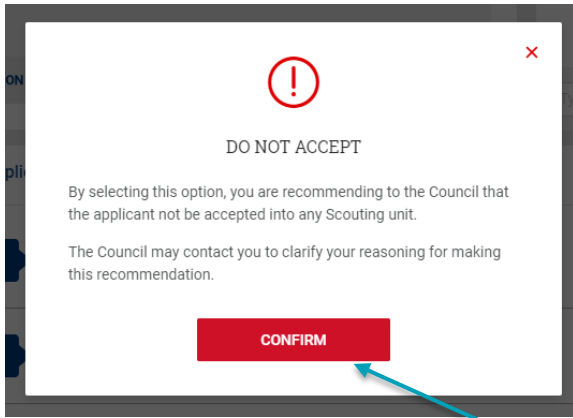
The applicant will receive an email message letting them know that the unit has reassigned their application to the district. It also contains the council contact information so that the applicant can follow up with the council.



Review Application		Pending Acceptance
1	Youth Information	COMPLETED
2	Guardian Information	COMPLETED
3	Terms and Conditions	COMPLETED
4	Checkout Summary	COMPLETED
5	Payment Confirmation	COMPLETED

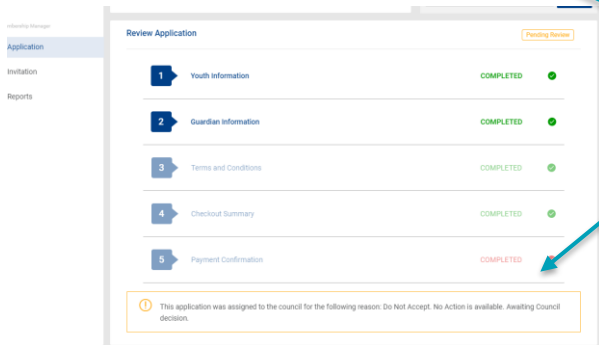
The final option you have for Youth applications is **Do Not Accept**.

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

Crew 0003

11 Total Applications (Last 30 days) | 0 Days Average processing time (Last 30 days) | 7 Applications 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). 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 checked="" type="checkbox"/> Adult	<input type="checkbox"/> Pending Acceptance
<input type="checkbox"/> Youth	<input type="checkbox"/> Pending Applicant Response
	<input type="checkbox"/> Pending Payment
	<input type="checkbox"/> Pending Refund
	<input type="checkbox"/> Pending Reassignment
	<input type="checkbox"/> Pending Acknowledgement
	<input type="checkbox"/> Pending Applicant Agreement
	<input type="checkbox"/> Closed
	<input type="checkbox"/> Pending Review
	<input type="checkbox"/> Completed

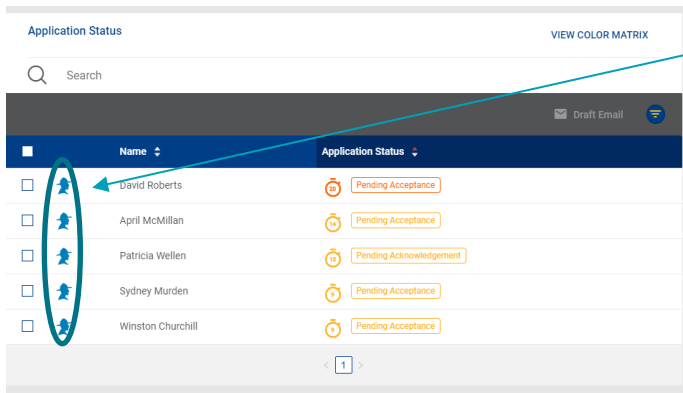
CLEAR OPTIONS | SHOW RESULTS

Troop 0003

Application Status VIEW COLOR MATRIX

Search

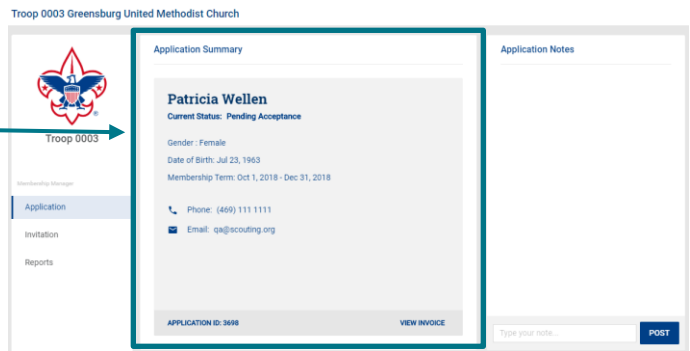
Name	Application Status
Hugh Davidson	Pending Acceptance
Bruce Lemmon	Pending Acceptance
David Roberts	Pending Acceptance
April McMillan	Pending Acceptance
Patricia Wellen	Pending Acceptance
Billy Kidd	Pending Acceptance
Sydney Murden	Pending Acceptance
Winston Churchill	Pending Acceptance
Lionel Richey	Pending Acceptance
Kyle Wellen	Pending Acceptance



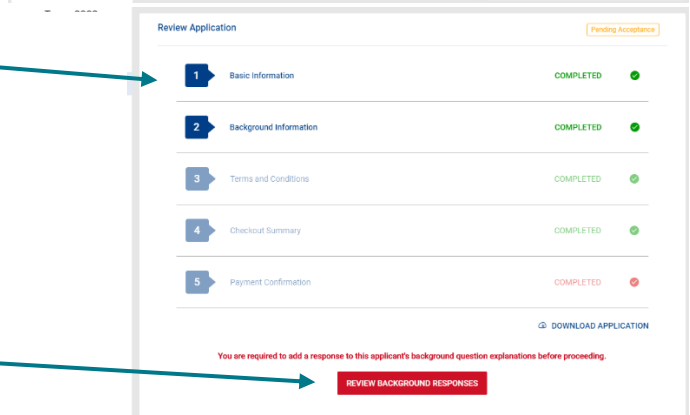
Once you select **Show Results** on the filter, only adults will appear in the Application Status view. Adults include Volunteer and Ventruing Participants in the filter.

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.



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



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: Pattys@scouting.org
APPLICATION ID: 3152 VIEW INVOICE

Application Notes

ACKNOWLEDGEMENT NOTE
I called the applicant and talked with her about these items.
Wed, Oct 31, 2018 8:04 PM
10/31/2018

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

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

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 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

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. Clicking here a Popup modal appears with what is needed. Click ok and the screen to make the entry appears.

Name	Date Submitted	Application Status
Harley Davidson Crew 0003, Greensburg United Methodist Church Application#: 4842	03 November 2018	Pending Applicant Response Please give additional information about the incident in the screening questions.

WITHDRAW PROVIDE ADDITIONAL INFORMATION

Please Make the Following Changes:

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

Cancel OK

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: 6645454545

+ Add

Submit Changes For Review

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

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

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

ACCEPT APPLICANT

* Select an Available Position:

Assistant Scoutmaster

Committee Member

Leader of 11-Year-Old Scouts

New Member Coordinator

Unit Chaplain

Unit College Scouter Reserve

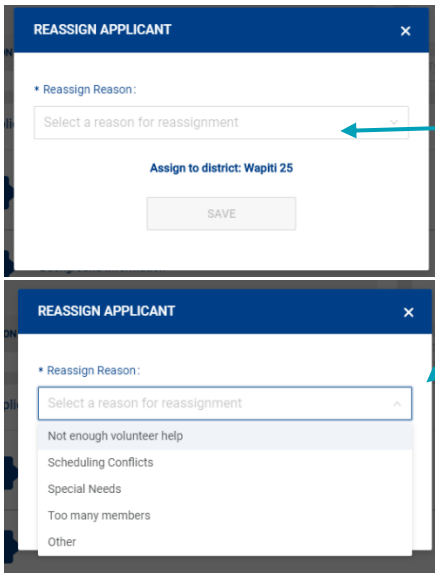
Unit Religious Emblems Coordinator

Unit Scouter Reserve

The applicant will move out of Pending Acceptance on your dashboard and into either Pending Payment (if they selected cash option) or Completed status.

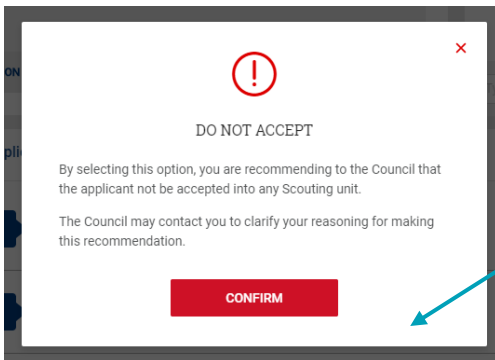


If you do not want to accept the adult, you can choose either **Reassign** or **Do Not Accept**.



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.



If you select **Do Not Accept**:

- You will be asked to confirm your 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

Membership Manager
Crew 0003

Membership Manager
Application
Invitation
Reports

Reports

APPLICATION SUMMARY
The Applications Summary report is a recap of in-progress applications summarized by status and days in progress. [Run](#)

APPLICATIONS IN PROGRESS
The Applications In-Progress report displays the list of membership applications that have not been accepted or rejected. These applications are progressing through the workflow and may require a unit leader or council person to take an action - review, accept, acknowledge, comment, re-assign, etc. [Run](#)

CLOSED APPLICATIONS
The Closed Applications report lists membership applications that were not completed registrations and are now closed. No further action is expected regarding closed applications. [Run](#)

CLOSED LEADS REPORT
This report group lists applications that were not completed and are now closed. No further action is expected regarding closed applications. [Run](#)

COMPLETED APPLICATIONS
The Completed Applications report is a list of membership applications that have been completely processed and resulted in a BSA membership for the designated term. [Run](#)

CREDIT CARD SALES
This report lists all completed membership applications from Online Registration that were paid with a credit card transaction. [Run](#)

MEMBERSHIP APPLICATIONS EXTRACT
The Membership Applications Report lists all membership applications processed through Online Registration. It reports all applications since the inception of Online Registration. This can be used for reconciliation, research, custom reporting, etc. [Run](#)

PAYMENT METHOD
This report lists completed membership applications from Online Registration by all payment methods. [Run](#)

REFUND DETAILS
The Refund Details Report lists details about membership applications that had their fees refunded. These applications are in "closed" status after the fees are refunded. Only applications paid with a credit card will appear on this refund list. [Run](#)

TIMED OUT APPLICATIONS
This report lists summary counts of membership applications that have timed out. The rows of the report are units. The columns are the total of timed out applications by month. [Run](#)

TIMED OUT APPLICATIONS SUMMARY
This report lists membership applications from Online Registration that were not processed within 60 days. Applications that reach 60 days of age without completion are considered timed-out. The applicant is automatically refunded fees collected if the transaction was processed with a credit card payment. [Run](#)

UNPAID APPLICATION
This report lists all incomplete membership applications from Online Registration that have not been paid. [Run](#)

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

Most commonly used reports at the unit level include:

- Unpaid Application report – here you can see the names of applicants who have selected to pay by cash. The unit needs to collect registration fees and turn the receipt and money to the council to finish the application process.
- Credit Card Sales report – here you can see the names of applicants who have paid by credit card. There is no further action for the unit to take on these applicants.
- Payment Method report – showing how each applicant paid.

Reports will be viewed in a spreadsheet format with columns and rows. The **Payment Method Report** provides a listing of accepted applicants, the amount each applicant was charged, the amount paid, any unpaid balance, and the method of payment. Units can use this report to understand who is paying in cash or credit and how much they owe the unit.

All reports can be downloaded into a CSV 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. You can later remove the filter by choosing disable grouping in the dropdown and then clicking Refresh.

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
 Organization Name: Crew 0003, Greensburg United Methodist Church
 Report Generated By: [Name]
 Date Report Generated: 11/03/2018

Export to CSV Export to PDF

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 Amou
3420	Traditional Adult	Spencer Davidson	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 10:03 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 IB (19-21)	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	(654) 645 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.