# 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:
   o Collects information from potential new Scouts for your unit from BeAScout;
   o Helps you manage leads from joining nights and from individual referrals; and
   o Allows you to send invitations directly to interested families with a link to the application that is specific to your unit.
2. Digital Application:*
   o Electronic application that collects all the data needed to register in a unit;
   o Allows the applicant (if over 18) or the applicant's parent to provide a digital signature; and
   o Includes an online credit card payment option or a cash/check option.
3. The Application Manager:
   o Collects completed applications from <u>new</u> youth and adults; *
   o 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;
   o Allows the Committee Chair to review the adult application and make recommendations for adult positions; and
   o 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.**
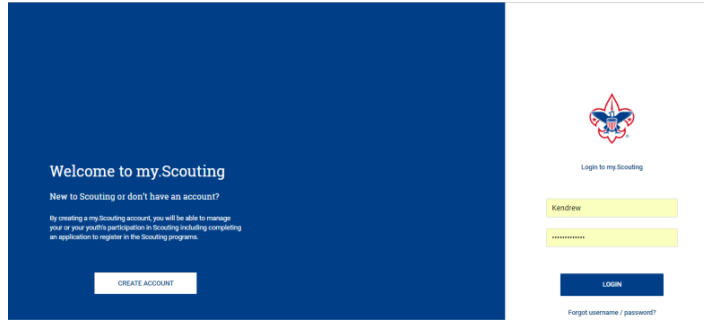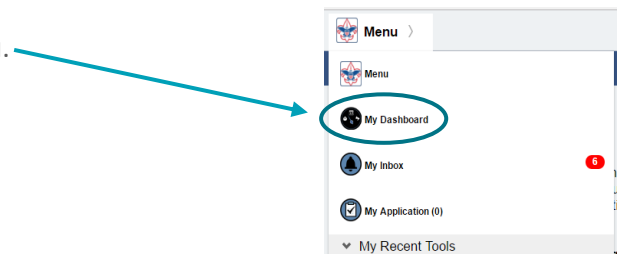
**Step 1.** Go to my.scouting.org and log in.

> If you do not have an account you can create by selecting "Create Account" and inputing the required information.
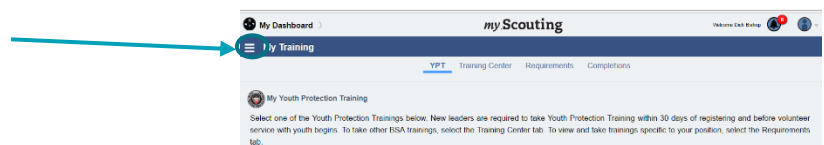
**Step 2.** Select **Menu** to get a drop down menu**.**
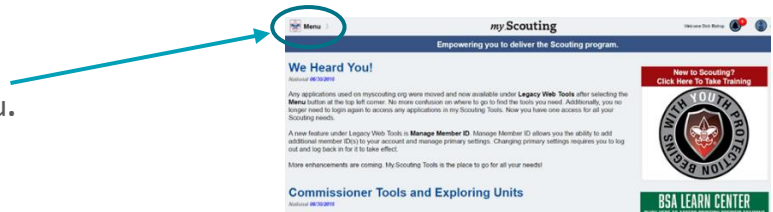
**Step 3:** Select **My Dashboard** in the dropdown menu.

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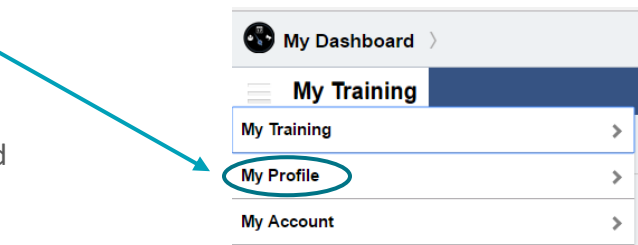
**Step 6.** To change your password and/or update security questions, click the pancake symbol and select **My Account** from the dropdown menu.

My Dashboard

**My Training**

| My Training | > |
| My Profile | > |
| My Account | > |
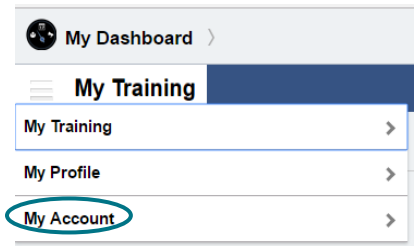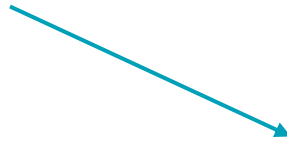
## SETTING UP YOUR UNITS BEASCOUT PIN

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
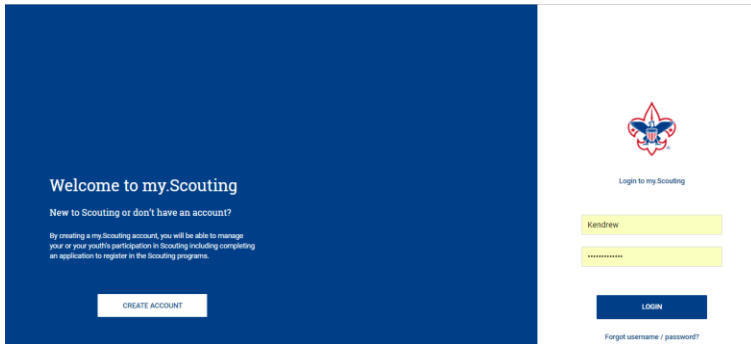


**Step 2: Go to BeAScout tools**

- Select **Menu**
- Select **Legacy Web Tools**
- Select **BeAScout**
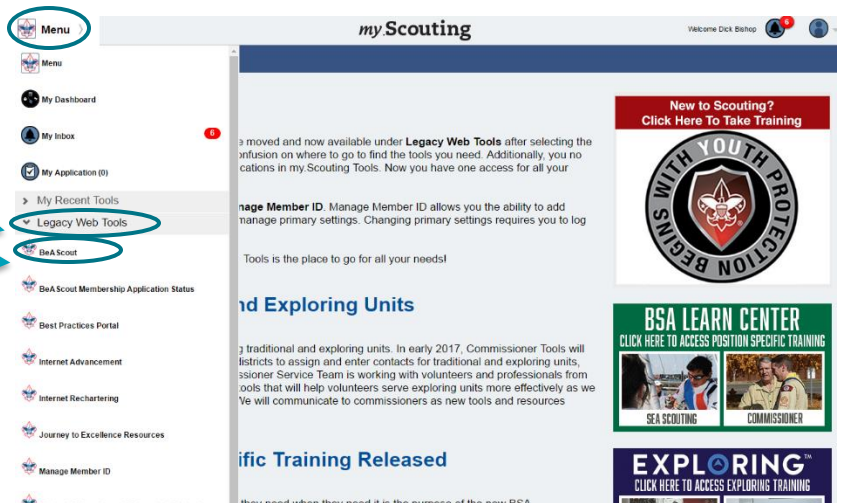
**Step 3: Update your Unit Information**

A. 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.

B. If your unit is not listed in the **Unit Description** box, use the drop-down menu to select your unit.

C. **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.

D. **Change your Pin Status to Active** so that your unit location shows on BeAScout.

E. **Set your Apply Status to Active** so that the "Apply Now" button displays on your units BeAScout pin.

F. **Enter your unit's web address** in the Unit Web Site box.

G. **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.
   - o 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.

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.

**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."
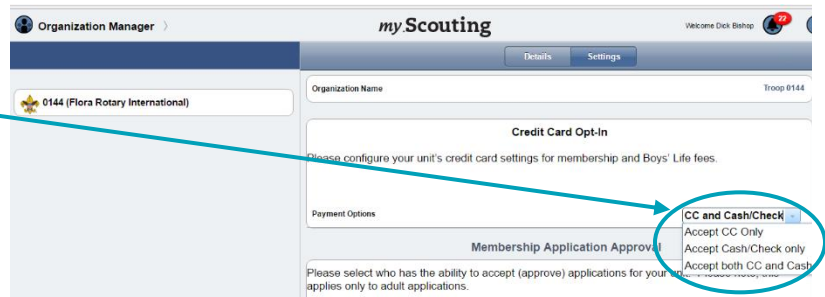


- **CC Recommendation**: Select whether you want the CC to recommend adult positions. Default is CR only.
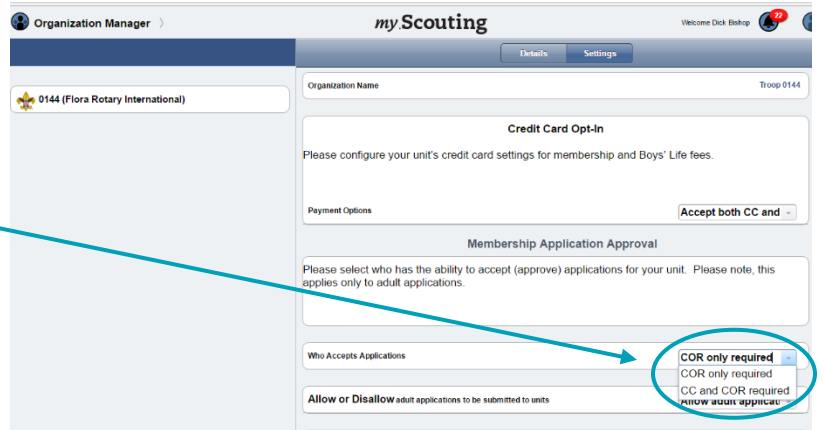


- **Adult Application Availability:** If you want to turn off adult application availability change that setting. (If this is not available the council has elected to configure this option for all units.) Default is to accept adult applications.
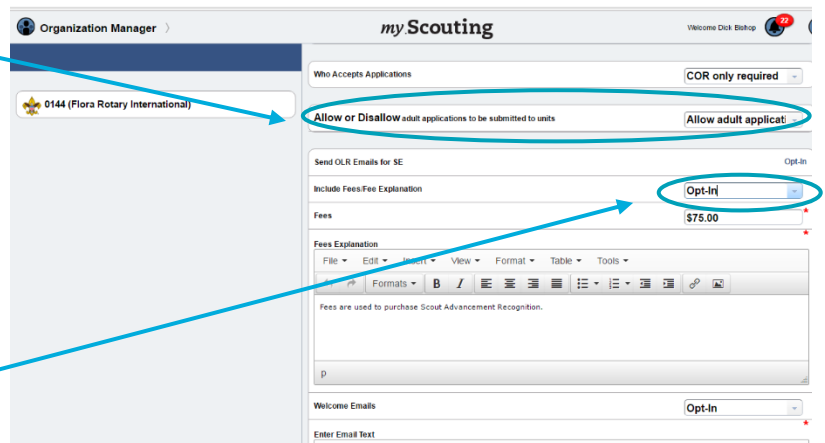
- **Unit Fee Message:** If you would like to display a message about additional unit fees, select opt in and type in the fee amount and a message about what the fee covers. Default is opt-out.
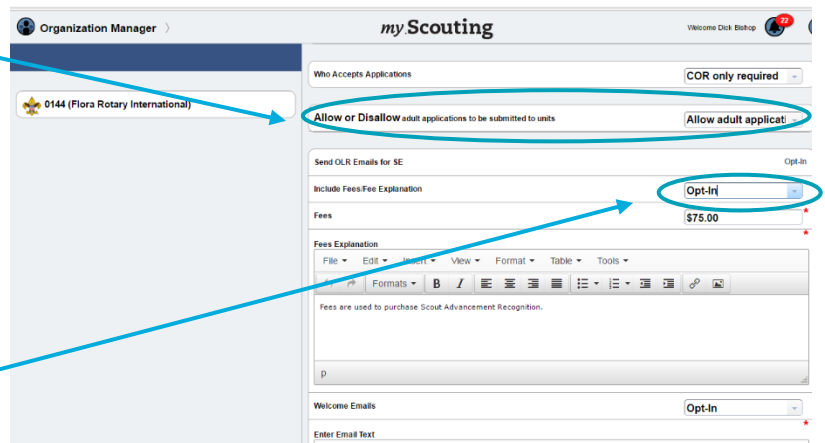
- **Automated Welcome Email:** If you would like an automated welcome email from your unit to be sent upon acceptance of an application **select opt-in** and type your message in the space provided. Opt-out is the default.
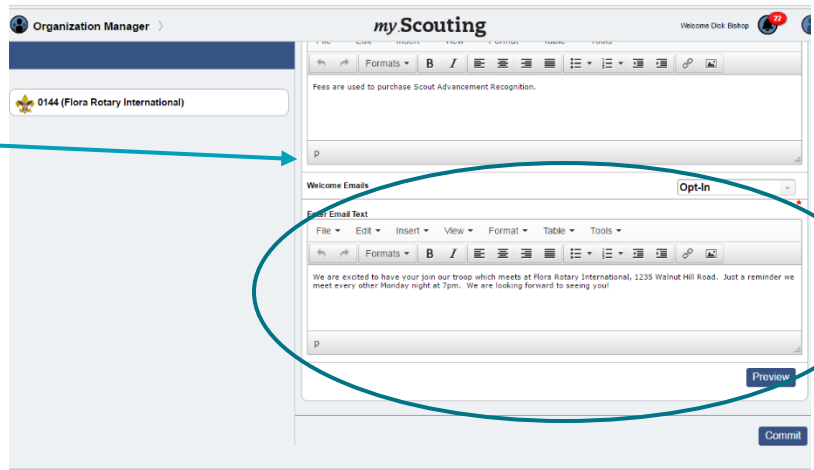


**Example of Welcome Email**
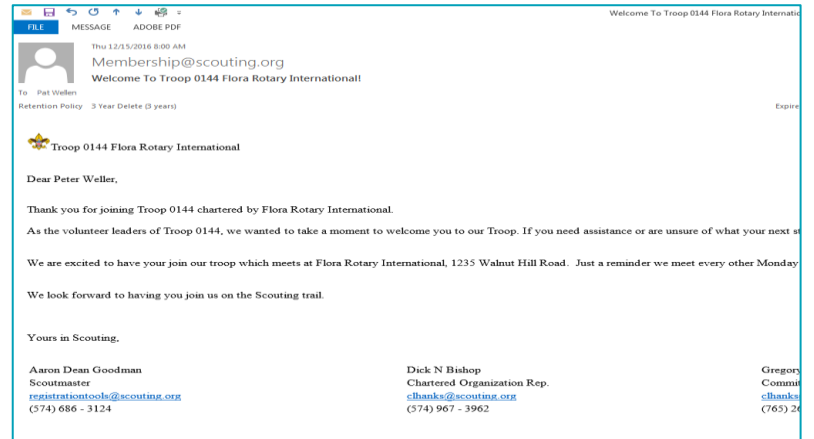


- **Family Scouting**: If your pack will be accepting girls – select opt-in for Family Scouting, enter the date, and then select whether the unit is accepting boys only, girls only, or both boys and girls.
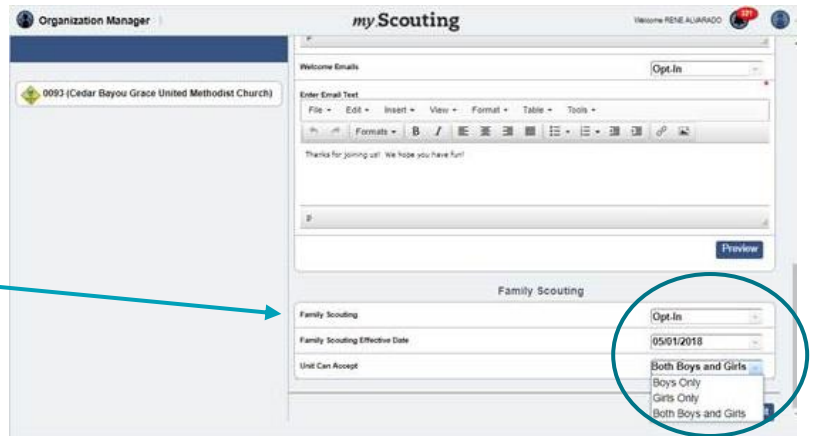
The BeAScout unit pin will show pins similar to the following depending on your choice.



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

2901 N MacArthur Blvd Irving TX 75062

**Contact:** Jody Agosta
**Email:** inccchurchoffice@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
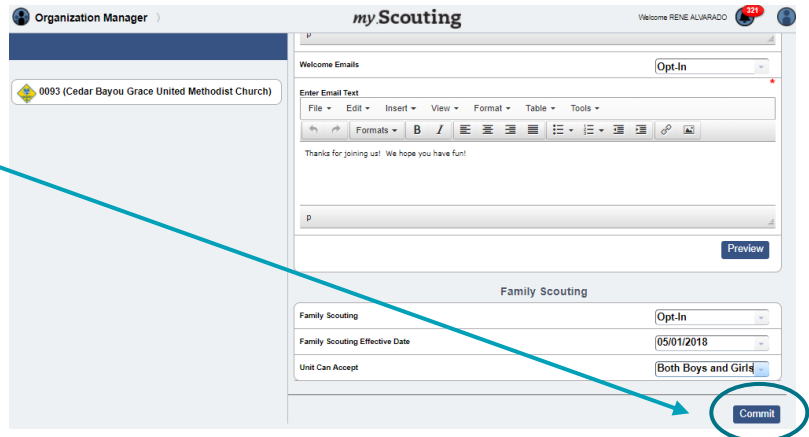
**Contact:** John Ringo
**Website:** http://www.pack-850.org

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.

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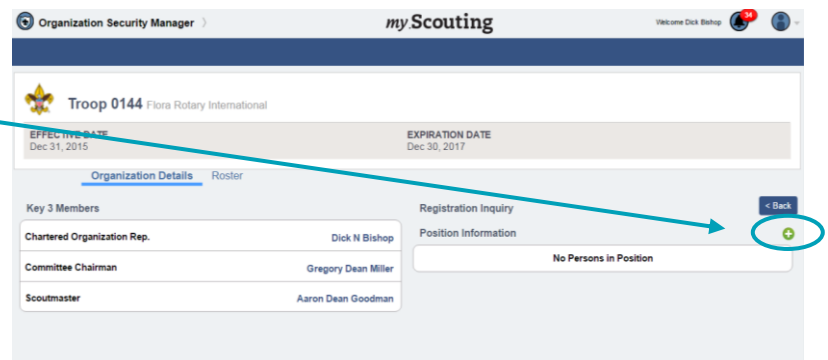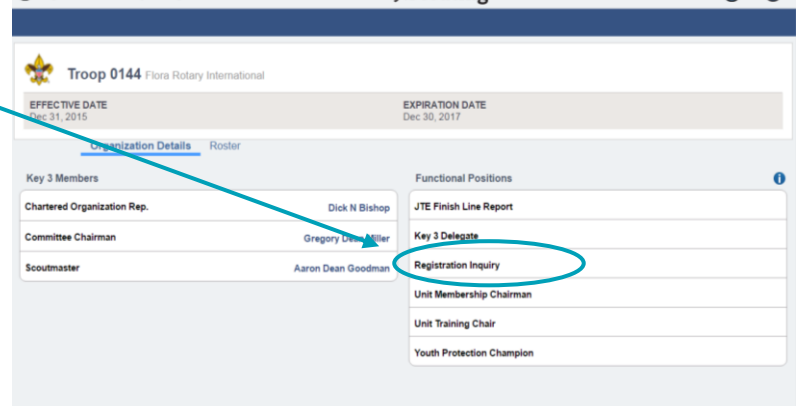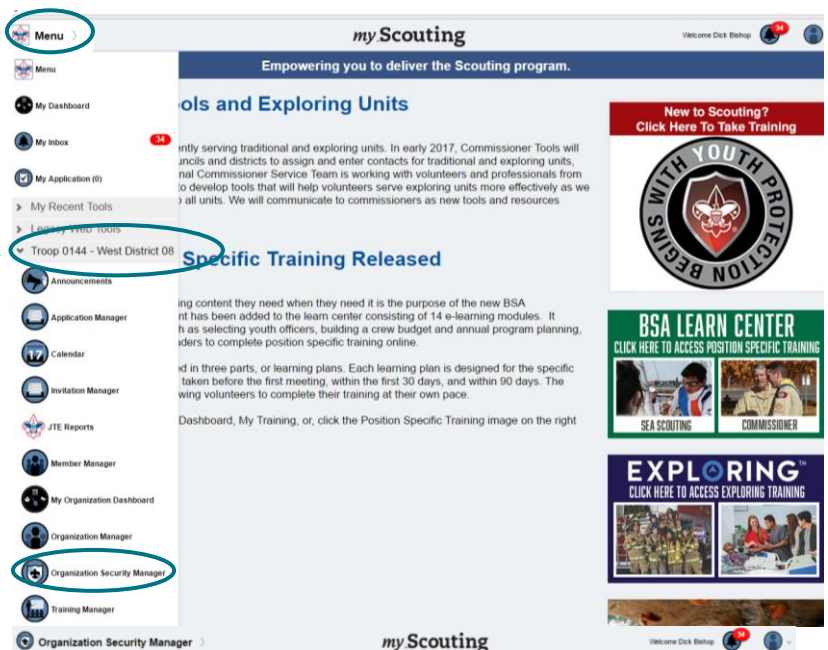
**Step 1:** While logged in to your My.Scouting account, select **Menu** at the top left-hand side of your screen.

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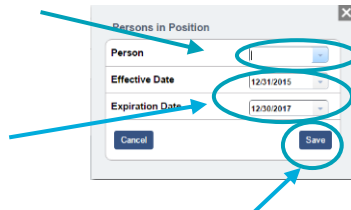
**Step 7: Save**.  It may take overnight before the person assigned shows as a delegate in that position.


## 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.
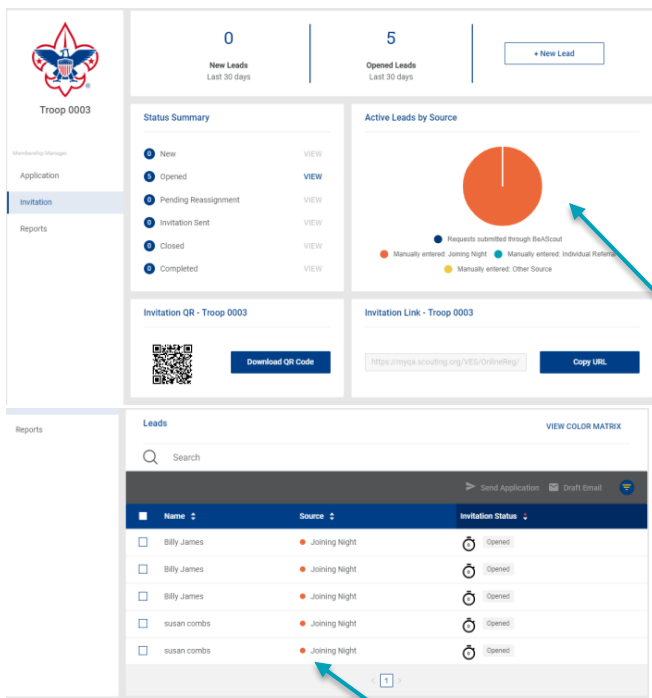

### USING INVITATION MANAGER - OVERVIEW

To view and act on an inquiry that has been submitted to your unit, you'll want to log in to my.scouting.org .
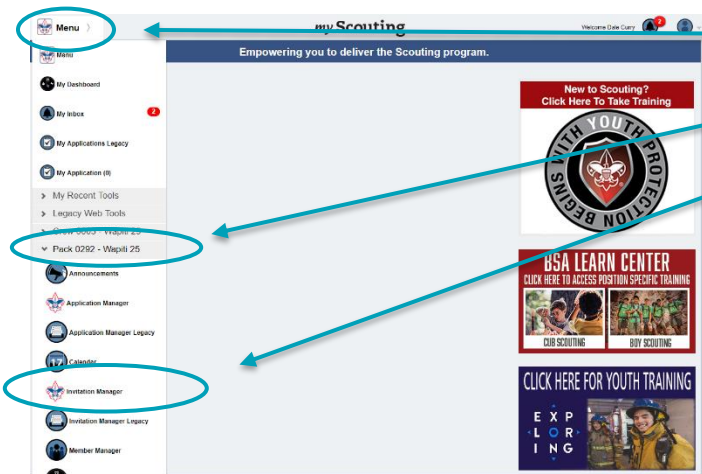
**Step 1: Select Menu** in the upper left corner.

**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.

- 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.
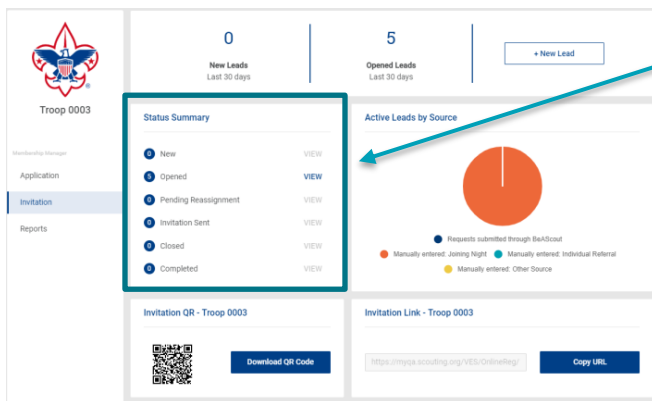


The **Status Summary** displays the number of requests that fall under the following statuses:

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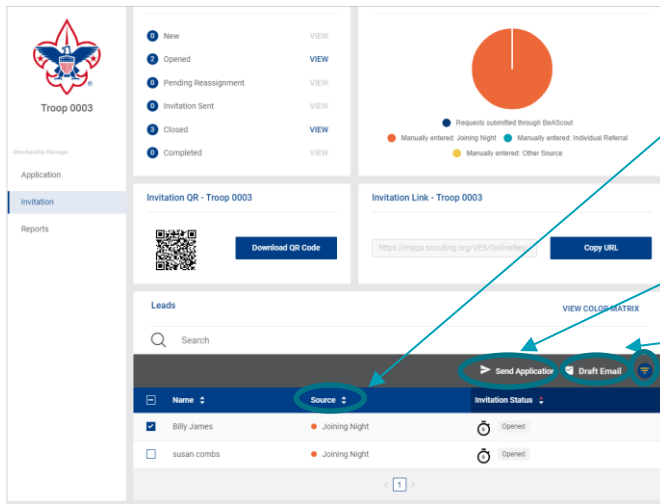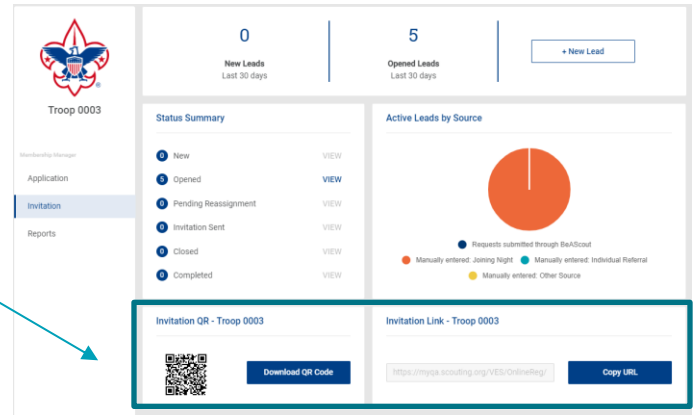
The **Source** column allows you to sort the Leads by the source through which they were received. This allows you to process from specific sources easily.

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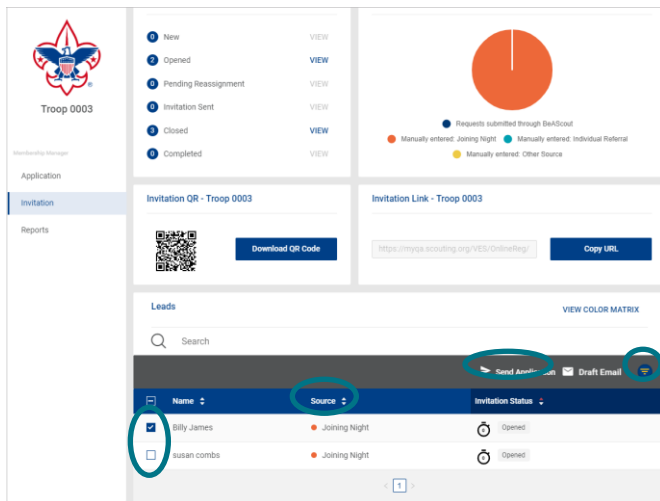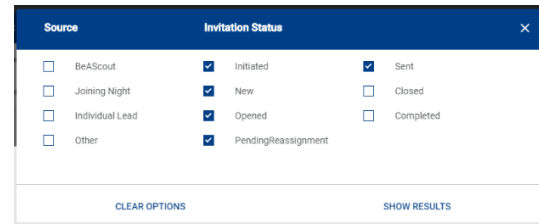
**EXAMPLE:** If you have a joining night and you want to send the application to everyone attending that night...

- 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 inviatation button.
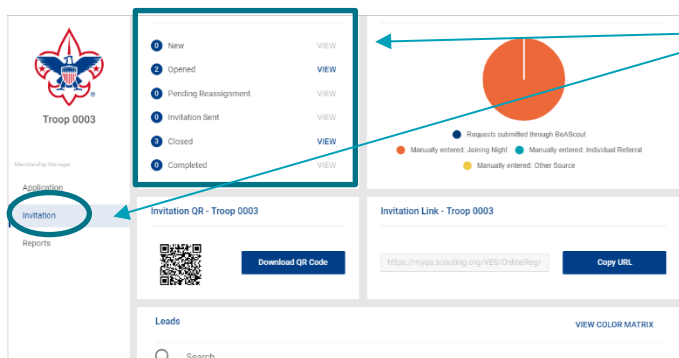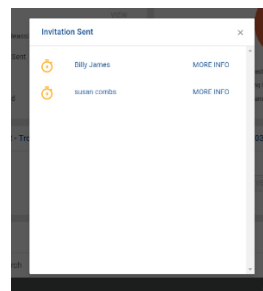


When you select the **Invitation** button on the menu to the left, your screen will refresh, and you will see the number next to the **Invitation Sent** category increment by the number of invitations just sent and the new and/or opened will decrease by the same number.
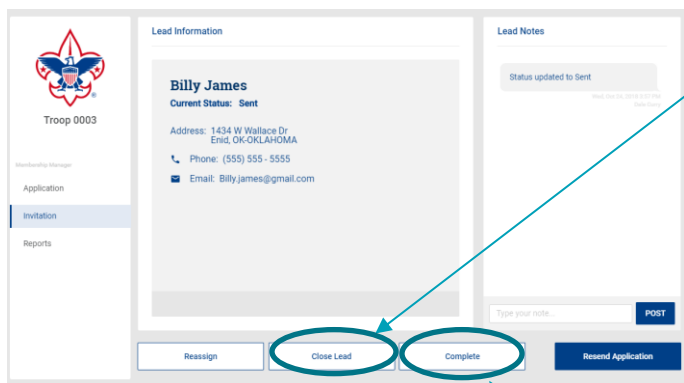


**Close Lead**.  You would use this button if:

- 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.
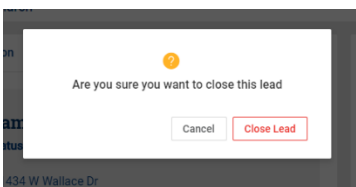
**Complete a Lead:**
After you receive a completed application from the lead you should go back to the lead and indicate it is complete to clear it from your lead list.
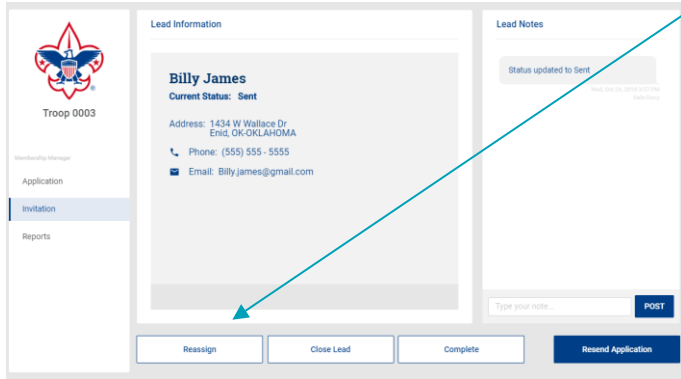
**Reassign the Lead:**

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.
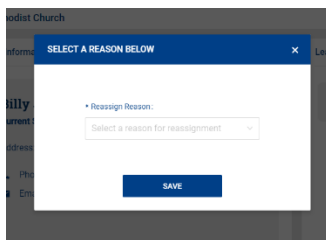
## ADDING LEADS MANUALLY

**Step 1**: Select **+New Lead.**
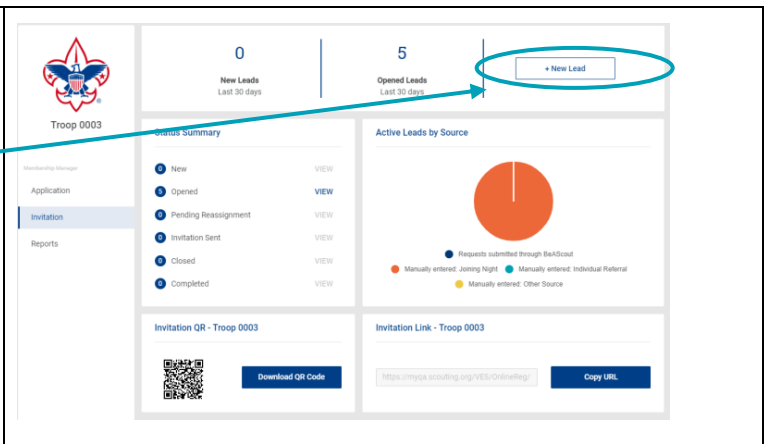
**Lead Source**

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

* Lead Source: [Lead Source ⌄]

**Parent / Guardian / Volunteer Information**

**Step 3**: **Enter information** in each required field.

* First Name: [First Name]

* Last Name: [Last Name]

Suffix: [Choose Suffix ⌄]

* Email Address: [Email]

* Phone Number: [Phone Number]

Country: [USA ⌄]

Address Line 1: [Address Line 1 ⚠]

Address Line 2: [Address Line 2]

City: [City ⚠]

State/Region: [Choose State/Region ⌄]

ZIP Code: [ZIP Code ⚠]

[SAVE AND ADD ANOTHER] [SAVE] [SEND APPLICATION]

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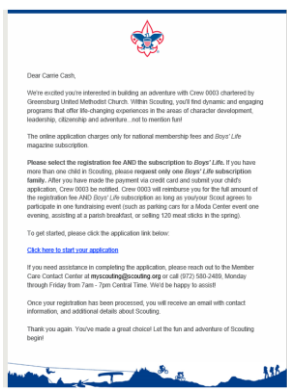
An invitation will be sent to the requestor and you will be returned to invitation dashboard.

# 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)* | • Review and accept or reject unit's adult leader applications. This is the only role that can accept or reject adult applications.<br>• Reviews and accepts or rejects unit's Venturing adult participant applications.<br>• Can review and accept or reject unit's youth applications (shared unit Key 3 role.) |
| Unit committee chair (CC) | • Can review unit's adult applications and make recommendations to approve to the CR.<br>• Can review and accept or reject unit's youth applications (shared unit Key 3 role.) |
| Unit leader (Cubmaster, Scoutmaster, Crew Advisor, Skipper, Coach ) | • 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
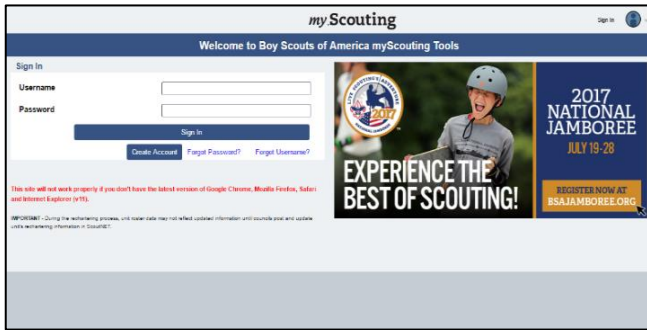


### OVERVIEW

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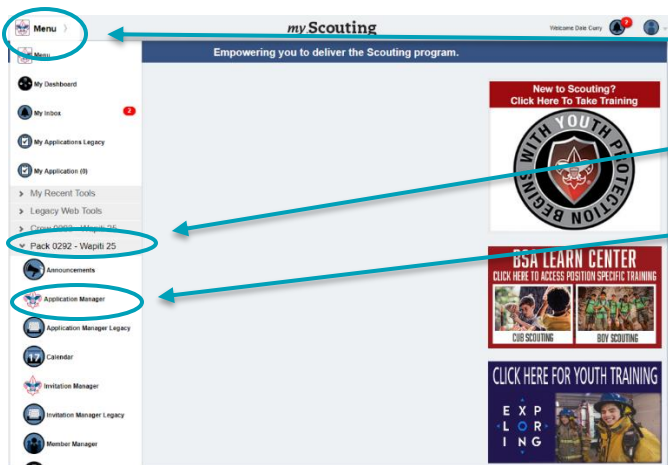


- Select **Menu**.

- 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.

<span style="color:red">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.</span>
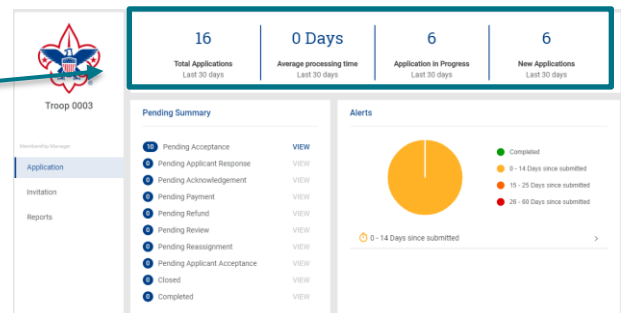
The **Summary** section of the dashboard contains a list of the different statuses that the applications can be in depending on the actions you have taken.

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.
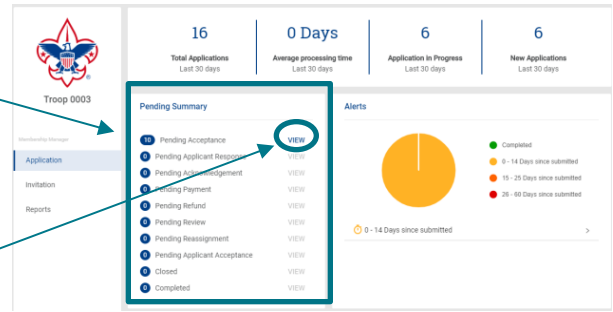
The **Alerts** section of the dashboard shows you how long applications have been pending since they were first submitted.
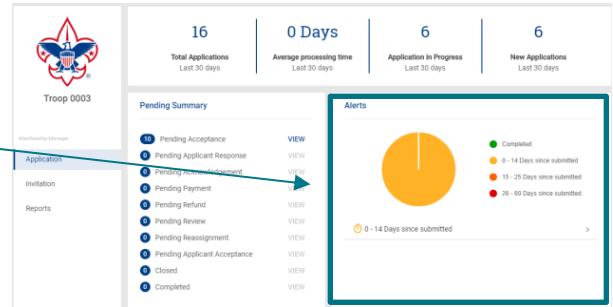
The **Applicants List** is at the bottom of the dashboard. This list contains the applications that have not completed processing.  When you first open the dashboard, the list will display the applicants who have been in the que to longest.

Applicantions can be sorted by name and application status by using the arrows next to each column name.
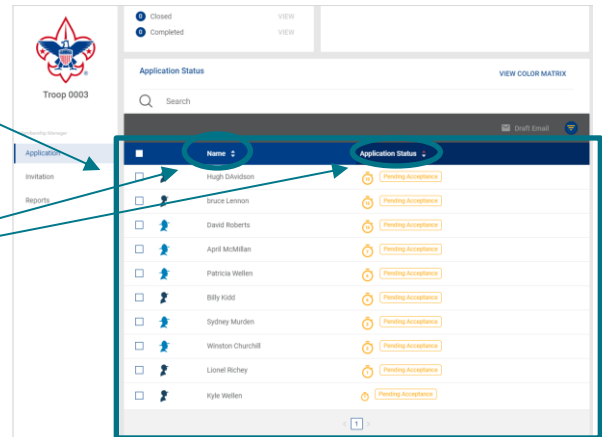
You can also **Filter** applicants by:
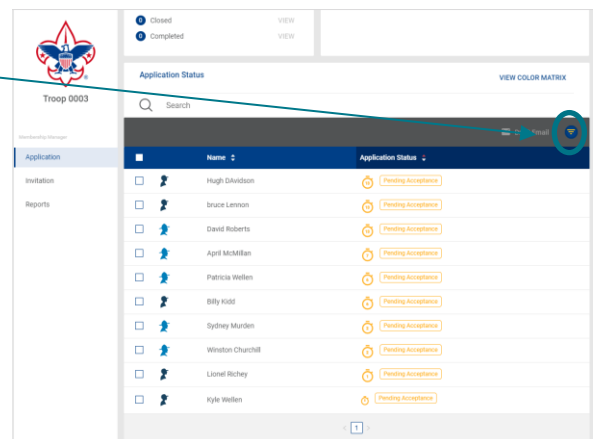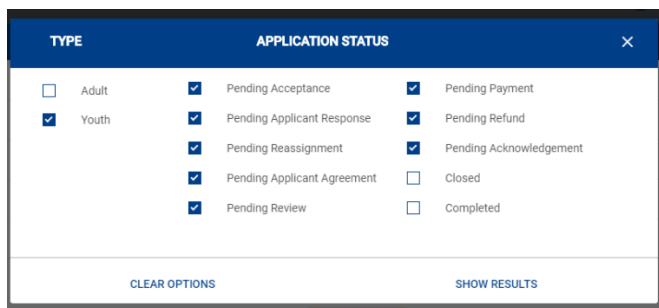
To **Search** for a specific individual, type the name in the search field.
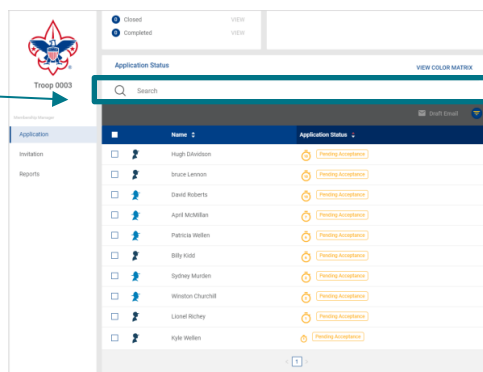
To see the details of an application, just click on the applicants name to open the application.
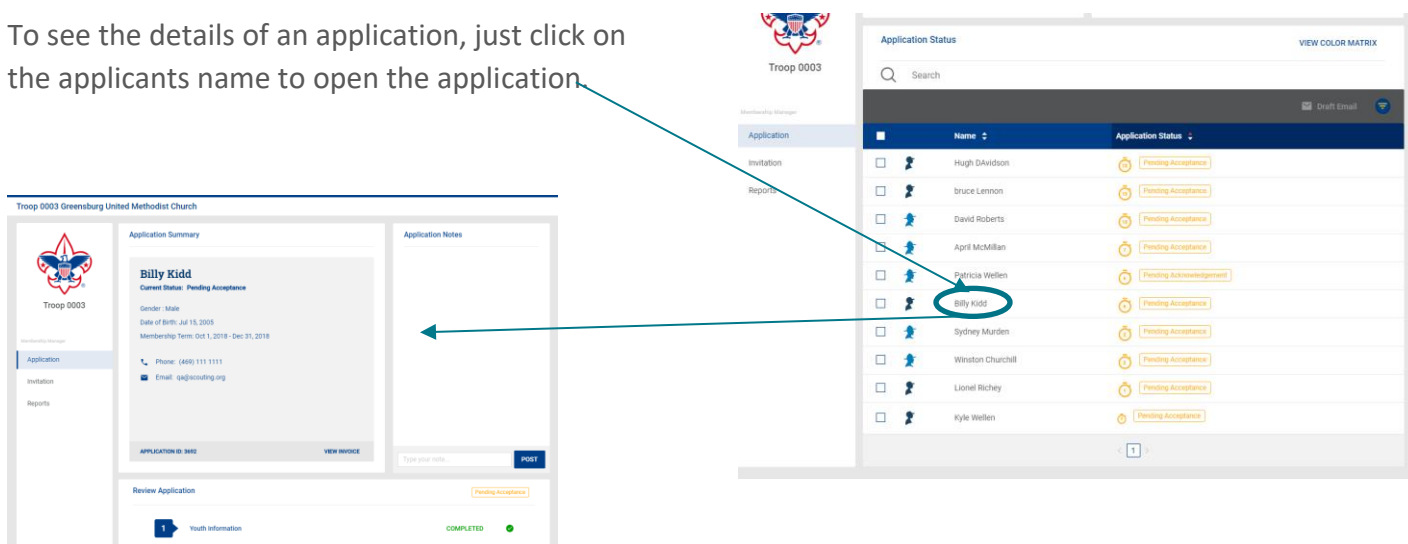
In this view, you can review parts one and two of the application.

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.
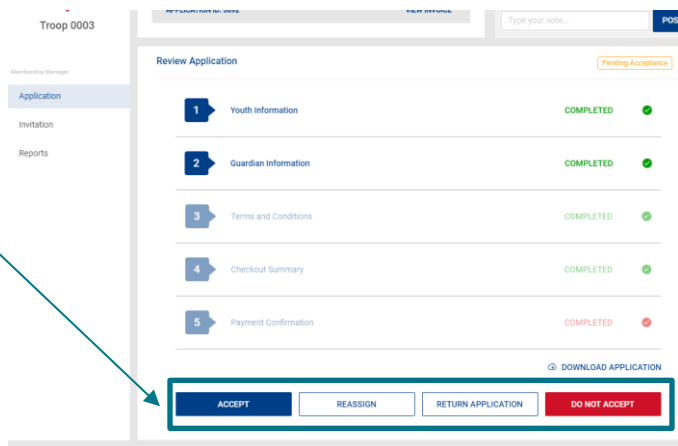
## UNDERSTANDING PAYMENT OPTIONS

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.
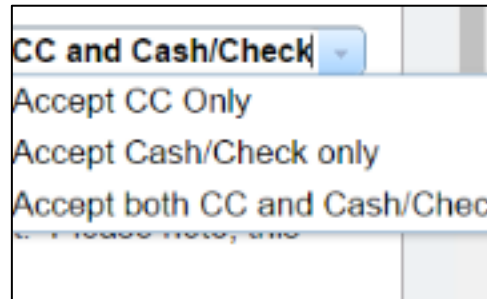




Pro-rated fees collected through online registration include only:

- 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."
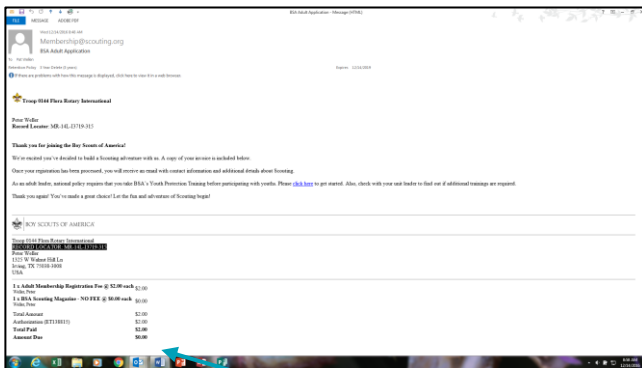
To the left is an example of the invoice an adult recieves upon submitting their application.  You will see that this person has **paid by credit card** and shows a balance of $0.00.  The message also provides the adult with a link to Youth Protection training so that they can complete their training 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 <u>must</u> collect from the applicant along with a copy of the email or invoice with the record locator.

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
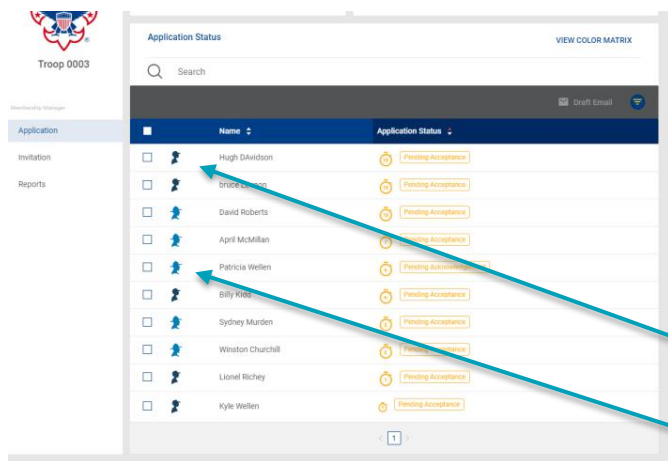


The position primarily responsible for accepting youth applications is the Unit Leader (Cubmaster, Scoutmaster, Coach, Venturing Advisor, Skipper); however, the Committee Chair and the Chartered Organization Representative can also accept youth applications.

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

Youth

Adult

Click on the name of the youth applicant to open the application.
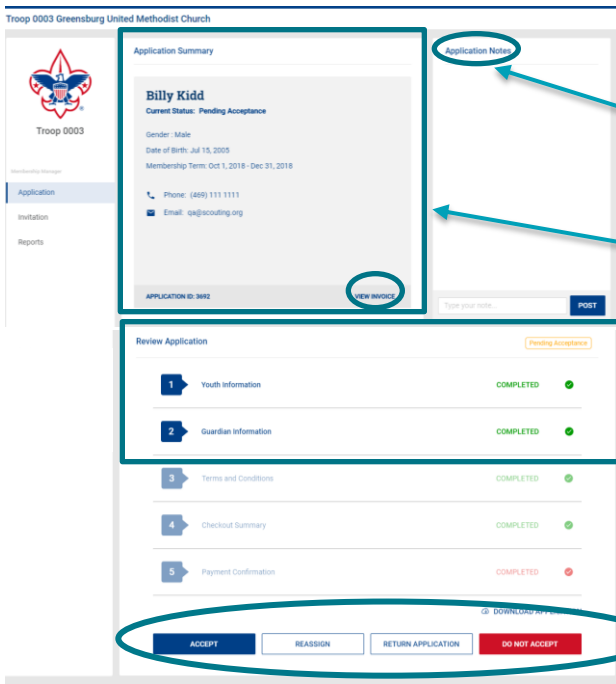
An Application Actions window appears. The main sections are:

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.
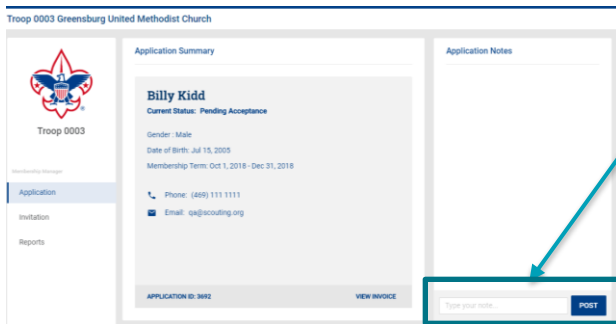


To **add a note**, click in text box, type your message and **click Post**. Whatever is entered here becomes an official and permanent part of the application records.

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.



**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.



- 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.
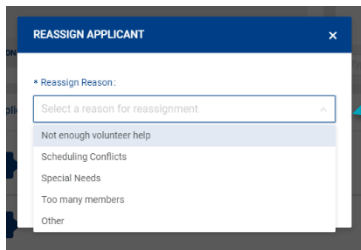


Select a reason for the reassignment request from the list provided. This will be used for reporting purposes.

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.
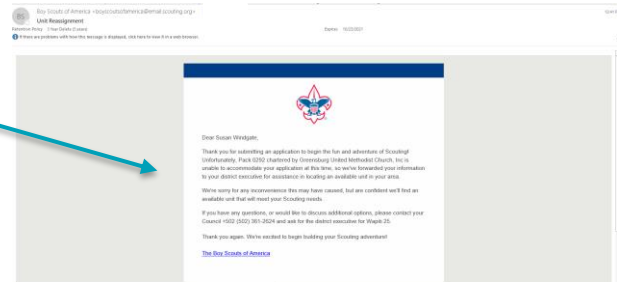


The final option you have for Youth applications is **Do Not Accept.**

If you identify an applicant you recommend for Do Not Accept, select the application record and click **Do Not Accept**.
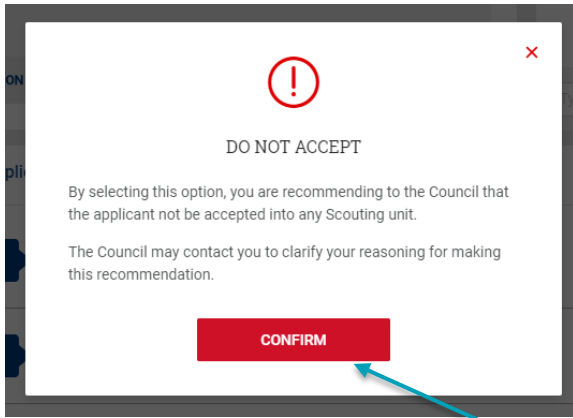
If you select **Do Not Accept** you will receive a **warning message** like the one on the left.

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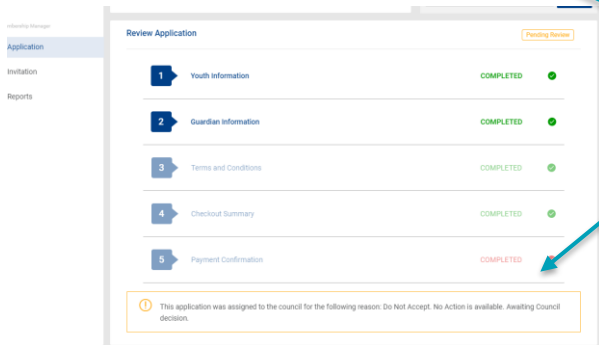


Click **Confirm** (clicking **X** will return you to the applications for you to choose a different action).

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



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:

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.
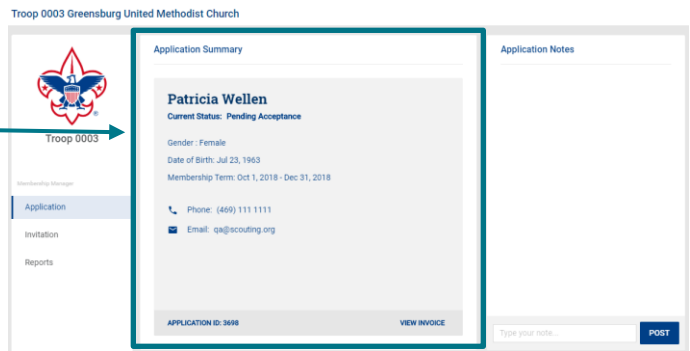


You can open the application by selecting the **Step** in the application.
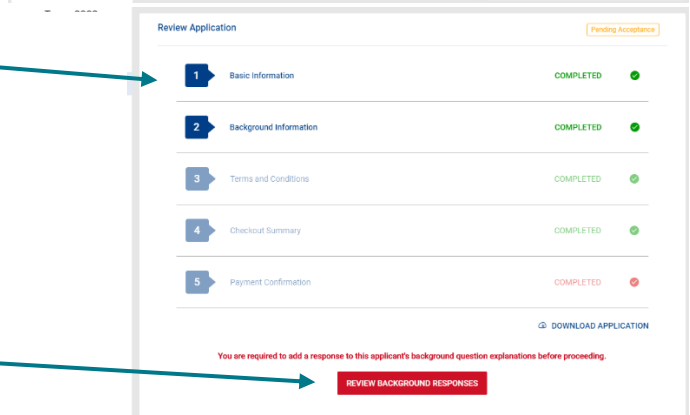
If an applicant has selected "yes" to any of the screening questions you will see a notice that you must review those answers and note your response before you can accept the applicant.  **Select the red button** to review those quesitons.

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.

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 Acknowldege** 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.

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

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.



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.



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.

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<br>phone: 6646464645 | + 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.

**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

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 into either Pending Payment (if they selected cash option) or Completed status.
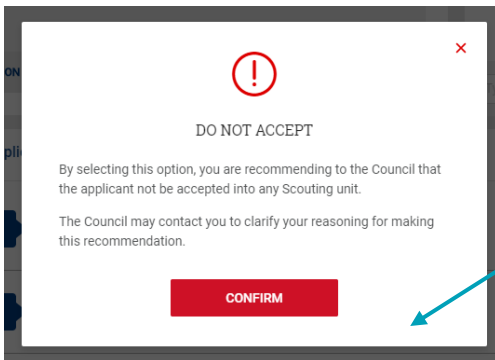
If you do not want to accept the adult, you can choose either **Reassign** or **Do Not Accept**.
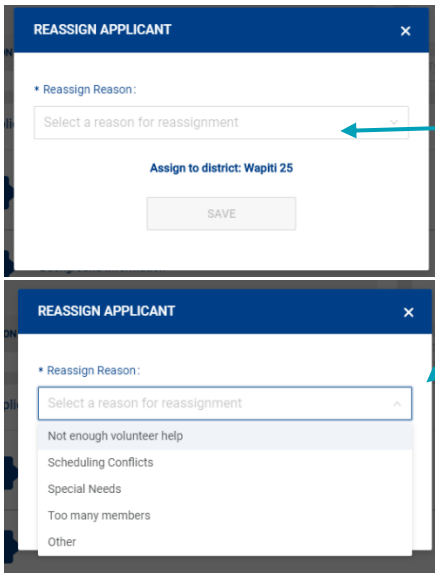
If you select **Reassign**:



- 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 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.

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.



# 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.