



# Online Registration

UNIT GUIDEBOOK

July, 2018

# Online Registration Unit Preparation Checklist

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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 a notification in their My.Scouting inbox once a day letting them know they have actions to take.

### 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 units 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 have to take.

**Step 1.** Go to [my.scouting.org](http://my.scouting.org) and log in.

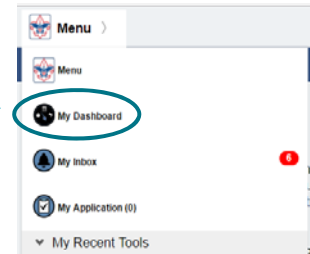
If you do not have an account you can create by selecting “Create Account” and inputting the required information.



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



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

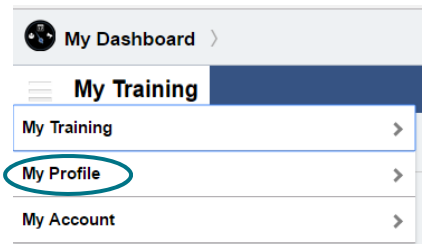


**Step 4.** System defaults to My Training. Click the **pancake symbol** next to My Training.

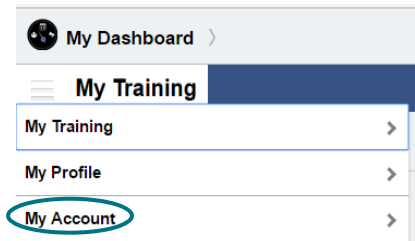


**Step 5:** Select **My Profile** from the dropdown menu.

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

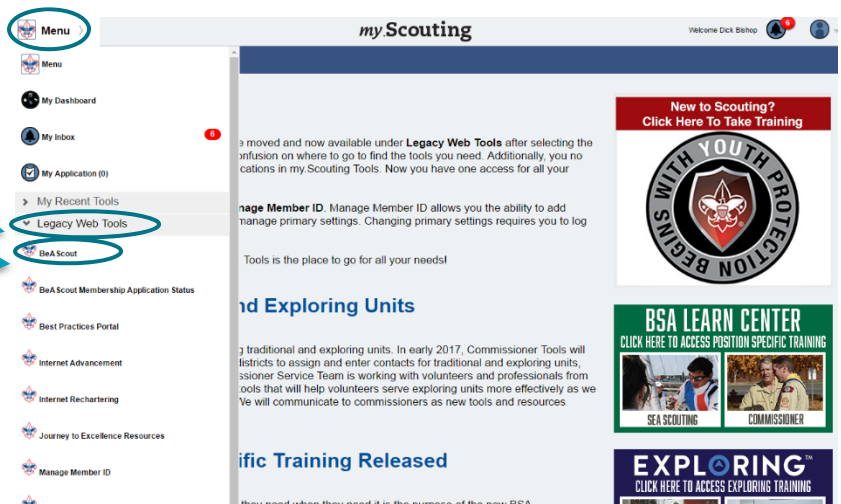
BeAScout is an online site that prospective members can use to find a unit near them. To prepare for your **My.Scouting Tools Online Registration** go-live, please verify that your BeAScout pin is turned on and that the contact information is current and displays the information you want shown for your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



**Step 1: Log in** to your My.Scouting account. - [my.scouting.org](http://my.scouting.org)

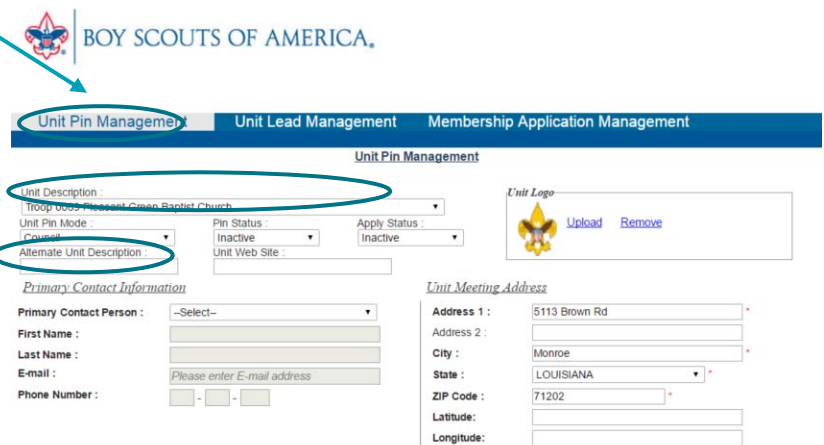
## Step 2: Go to BeAScout tools

- 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.



- 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 that interested families will contact if they need more information. Be aware that this 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.

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. **Alternative Contact Information.** This field is no longer in use in the BeAScout system. The information you enter will not control any actions in the online registration system.

K. **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.

The screenshot shows the 'Unit Pin Management' form for Troop 0069 Pleasant Green Baptist Church. The form is divided into several sections:

- Unit Description:** Includes fields for Troop, Unit Pin Mode, Pin Status, Apply Status, and Unit Web Site.
- Primary Contact Information:** Includes fields for First Name, Last Name, E-mail, and Phone Number.
- Alternate Contact Information:** Includes fields for Alternate Contact #1 and #2, each with a name and E-mail field.
- Unit Meeting Address:** Includes fields for Address 1, Address 2, City, State, ZIP Code, Latitude, and Longitude.
- Additional Unit Information:** Includes a Brief Description field and a 140-character limit for additional information.
- Unit Pin Preview:** Shows a preview of the unit pin with the following information: Troop 0069 Pleasant Green Baptist Church, Contact: 213 Louisiana Purchase Council, 318-325-4634, PO Box 2405, Monroe, LA 71207.

At the bottom right, there are 'Save' and 'Cancel' buttons. The 'Save' button is circled in red.

**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 assign the adult positions 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.

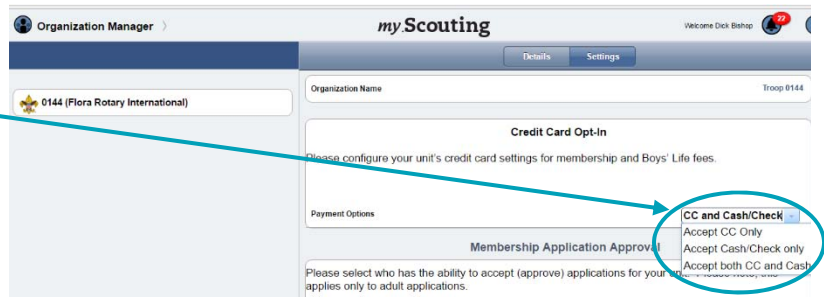
**Step 3:** Select **Organization Manager**

**Step 4:** Select the **Settings** tab.

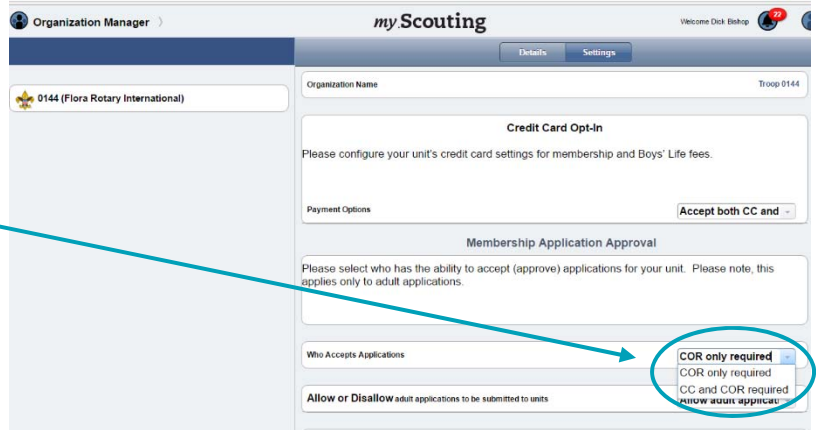
The image shows two screenshots of the My.Scouting web interface. The top screenshot displays the main dashboard with a left-hand navigation menu. The 'Menu' button at the top left is circled in blue. Below it, the 'Troop 0144 - West District 08' option is also circled in blue. Further down, the 'Organization Manager' option is circled in blue. The right side of the dashboard shows various announcements and training links. The bottom screenshot shows the 'Organization Manager' page for '0144 (Flora Rotary International)'. The 'Settings' tab is circled in blue at the top right of the page. The main content area displays organization details such as 'Effective Date', 'Expiration Date', and 'Executive Officer (IH)'.

**Step 5: Set configurations:**

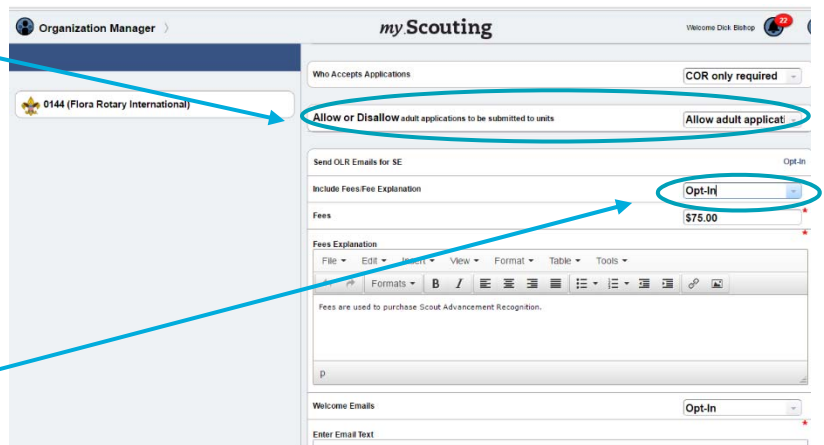
- **Payment options:** Select the payment option your unit wishes to use from the drop down list. (If this is not available the council has selected to override this configuration). Default is "Accept cash/checks only."



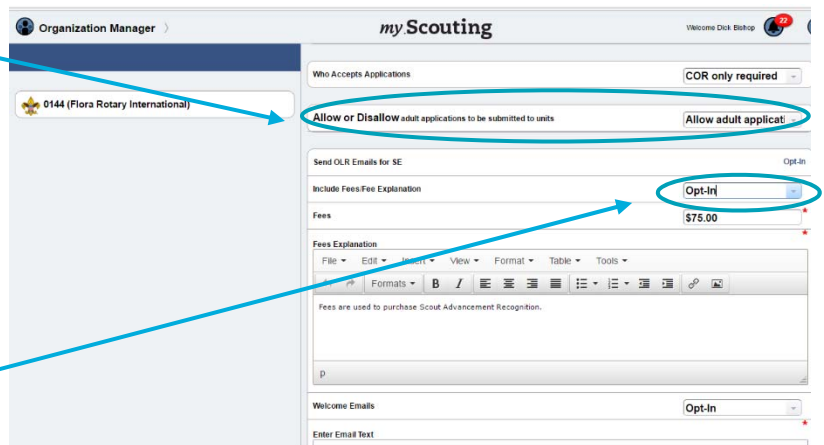
- **CC Recommendation:** Select whether you want the CC to recommend adult positions. Default is CR only.



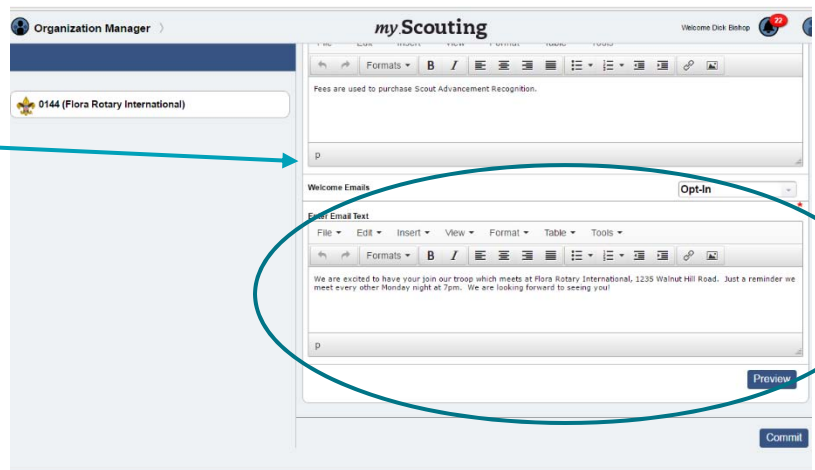
- **Adult Application Availability:** If you want to turn off adult application availability change that setting. (If this is not available the council has elected to configure this option for all units.) Default is to accept adult applications.



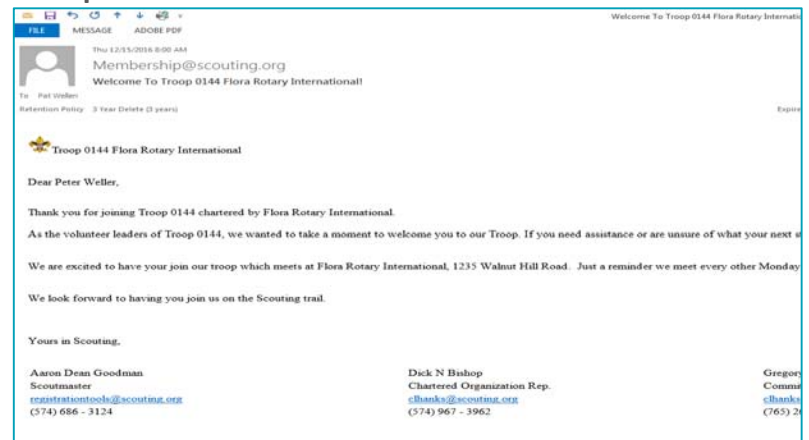
- **Unit Fee Message:** If you would like to display a message about additional unit fees, select opt in and type in the fee amount and a message about what the fee covers. Default is opt-out.



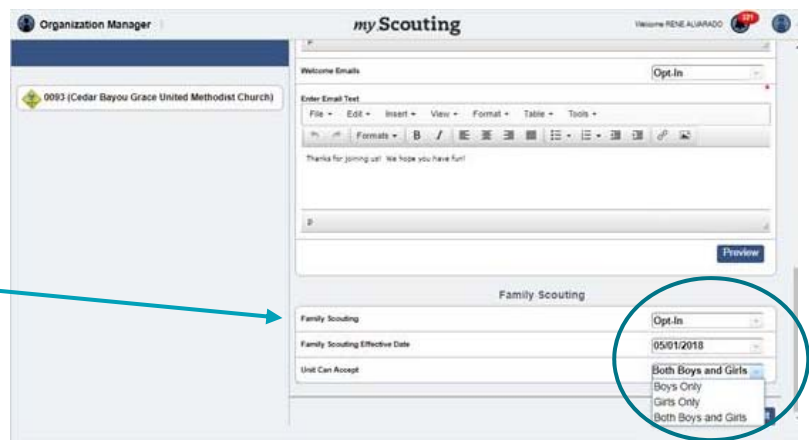
- Automated Welcome Email:** If you would like an automated welcome email from your unit to be sent upon acceptance of an application **select opt-in** and type your message in the space provided. Opt-out is the default.



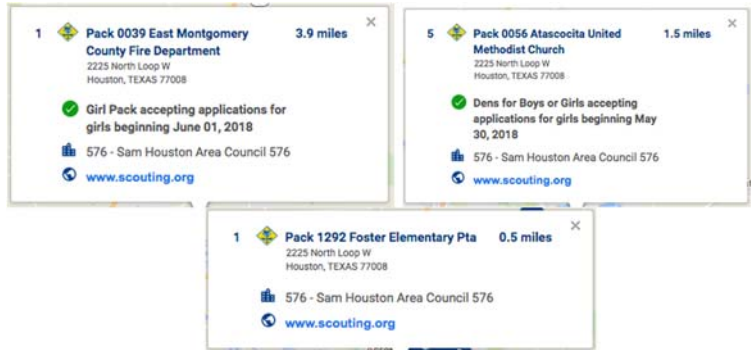
### Example of Welcome Email



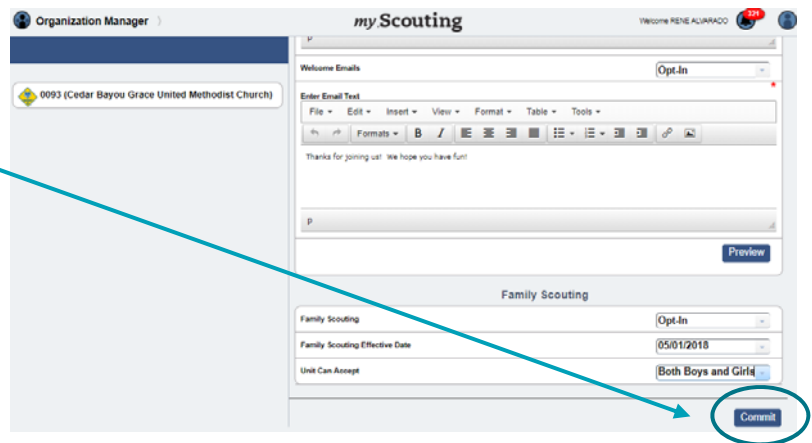
- Family Scouting:** If your pack will be accepting girls – select opt-in for Family Scouting, enter the date, and then select whether the unit is accepting boys only, girls only, or both boys and girls.



The BeAScout unit pin will show one of the following depending on your choice.



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



# 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)
- Unit membership chair

\* = 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.

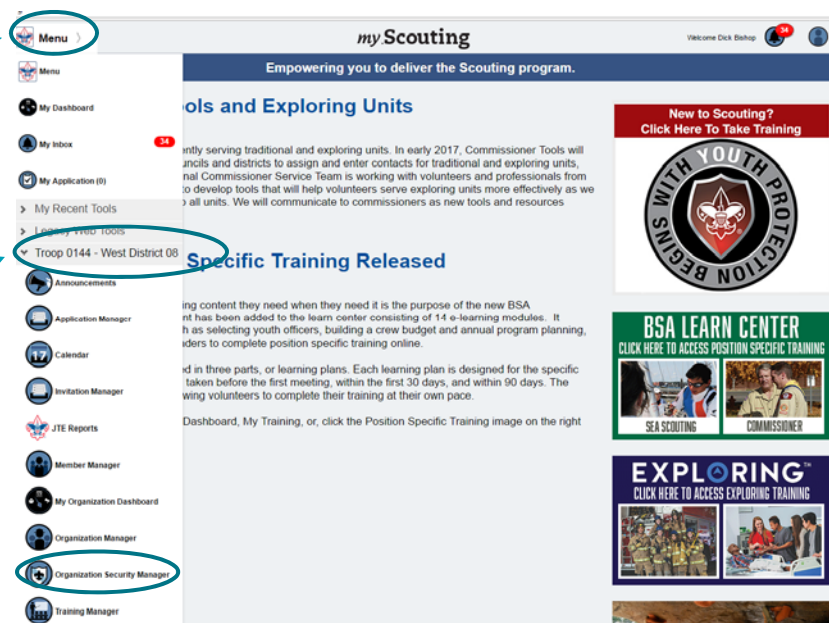
## ASSIGNING REGISTRATION INQUIRY FUNCTIONAL ROLES

If your unit has a membership chair or other adults who are helping manage unit recruitment and who needs read only access to view leads and submitted requests in Invitation Manager and Application Manger you can assign them a functional role of “Registration Inquiry” in the system.

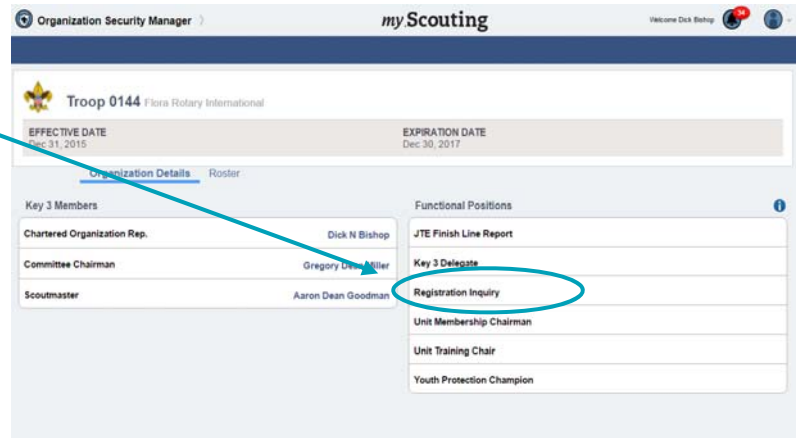
**Step 1:** While logged in to your My.Scouting account, select **Menu** at the top left hand side of your screen.

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

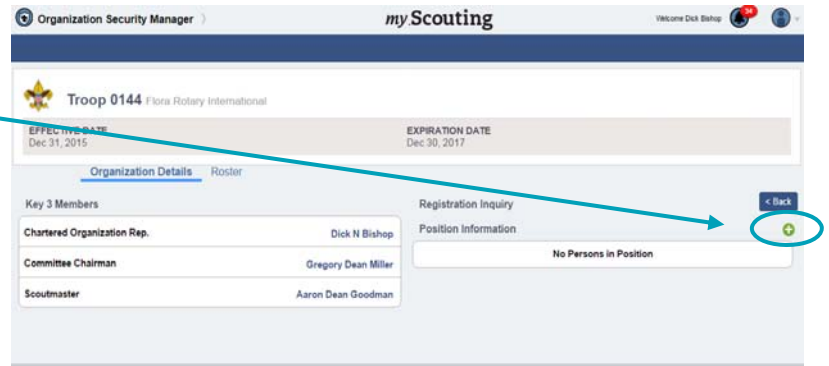
**Step 3:** Select **Organization Security Manager**.



**Step 4: Select Registration Inquiry.**

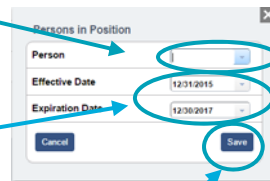


**Step 5: Select the plus sign to select the registered adult.**



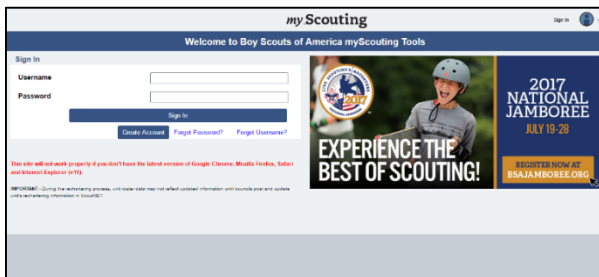
**Step 6: Select the person from the drop down menu. Only adults registered in your unit will show.**

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



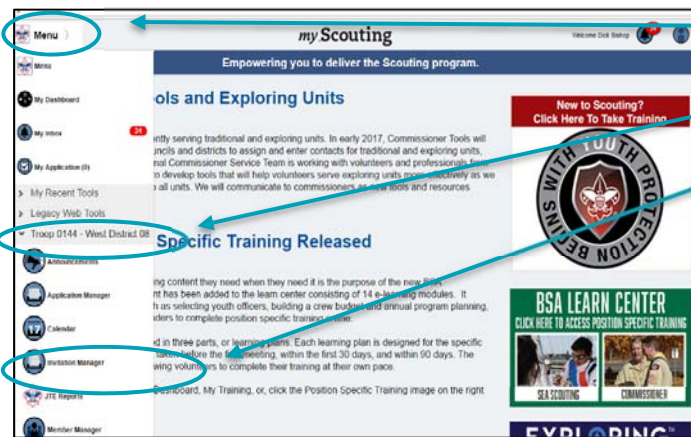
**Step 7: Save.** It will take 24 hours before the person assigned shows as a delegate in that position.

## USING INVITATION MANAGER



## OVERVIEW

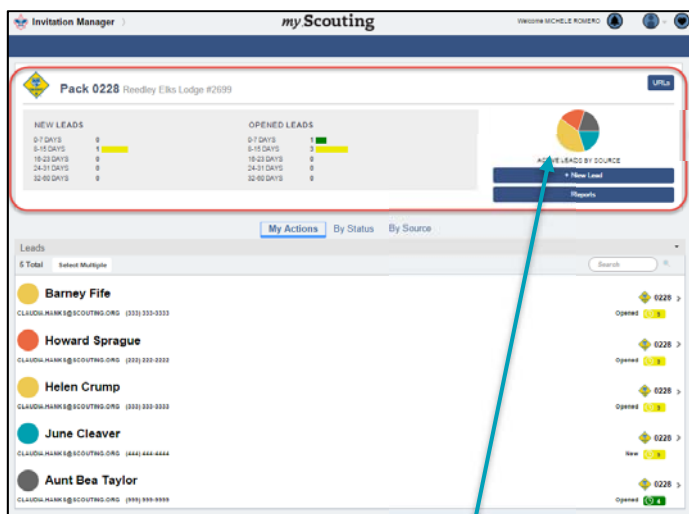
To view and act on an inquiry that has been submitted to your unit, you'll want to log in to [my.scouting.org](http://my.scouting.org).



Step 1: Select Menu in the upper left corner.

Step 2: Select your unit.

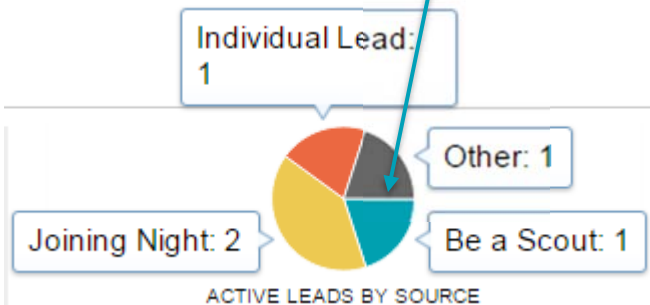
Step 3: Select Invitation Manager from the drop down list.



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.

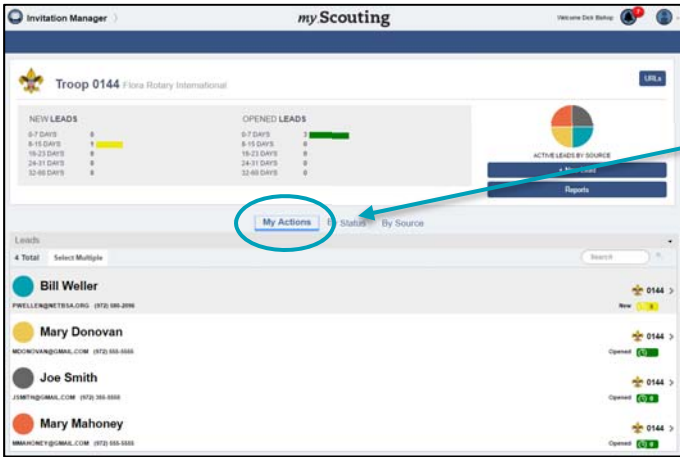
The pie chart may be empty (or white) when you first access this tool, but in this example we'll identify what each colored section means.



The colors in the pie chart correspond to the colored circle next to the person's name in the **My Actions** tab. Hovering over each color displays the number of active requests in that category.

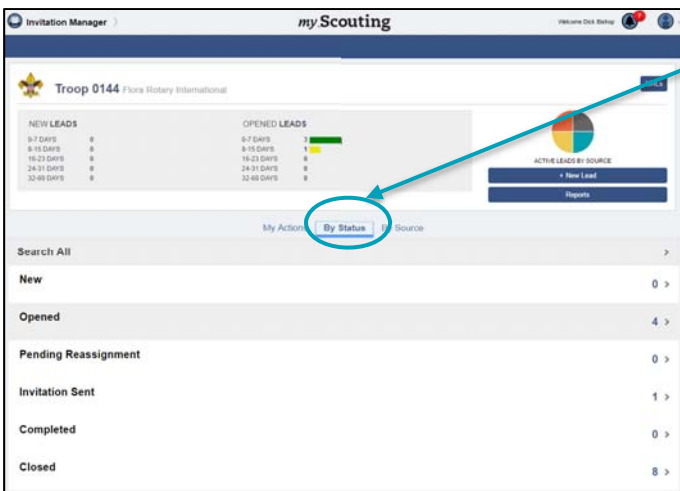
- **Blue** = requests submitted through BeAScout.
- **Yellow** = manually entered from joining night.
- **Orange** = manually entered from an individual referral.
- **Gray** = manually entered from a source other than those listed above.





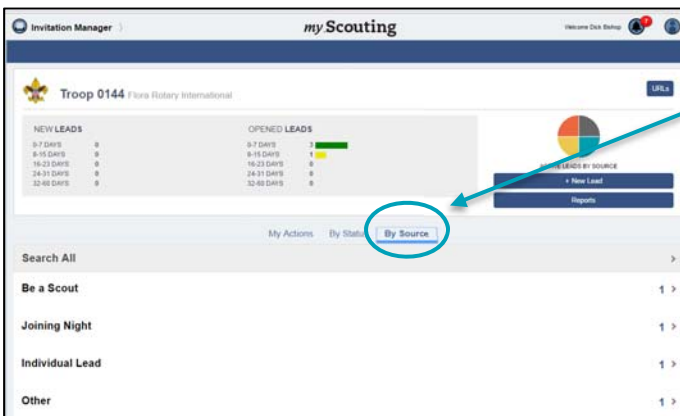
The Invitation Manager defaults to the **My Actions** tab.

- Only New and Opened requests appear on this tab.
- Those awaiting action the longest will appear at the top.



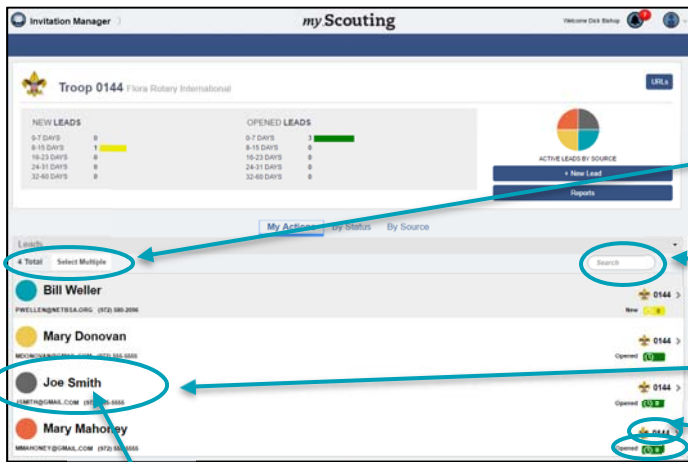
The **By Status** tab displays the number of requests that fall under the following statuses:

- **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**
- **Completed** - an invitation has been sent and opened and the person has initiated an online application.
- **Closed** - requests either timed out after 60 days of inaction or was manually closed by the unit to remove them from the My Actions list.



The **By Source** tab displays the number of New and Opened active requests received either through BeAScout, Joining Night, Individual Lead or Other.

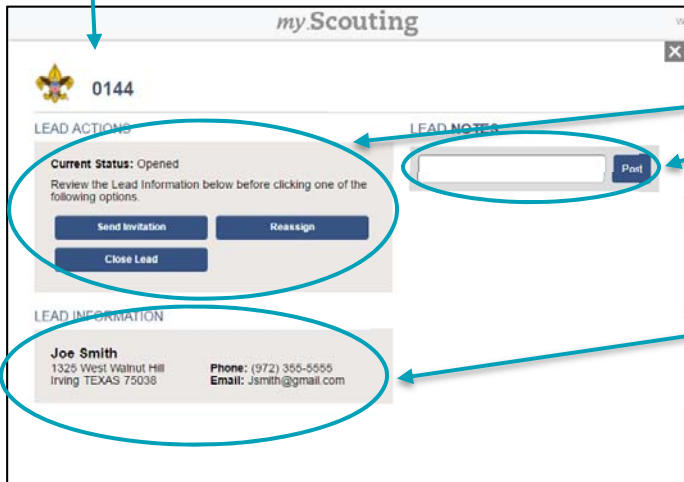
- It allows you to go directly to the leads you want to process from a specific source such as a joining night event.



Let's go back to the **My Actions** tab to cover more details about what is on the dashboard.

- The total number of New and Opened active requests is visible at the top of the list.
  - You can search using the input field on the left side of the header bar.
  - The name & email address of the adult making the request is displayed
  - Unit they want to join is listed.
  - A clock is present showing the number of days the request has been in the system. This icon is color coded and turns from green to red as they get closer to the 60 day age out of the system.
- To view a request, click on the name in the list and a new window displays the information in the request.

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



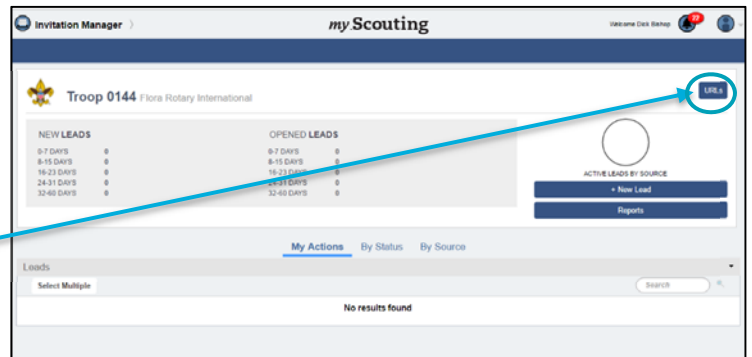
The Lead Actions window displays:

- **Actions** available to the person who is logged in.
- **Lead notes** so that others in the unit who can take action will know what has already been done. (If you want to add notes, post the note before clicking on an Action Button.)
- Summary section providing **lead information** and any comments from a lead if they submitted through BeAScout.

## USING URL'S AND QR CODES

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

To access the URL or QR code select the URL button on the top right hand side of the screen.



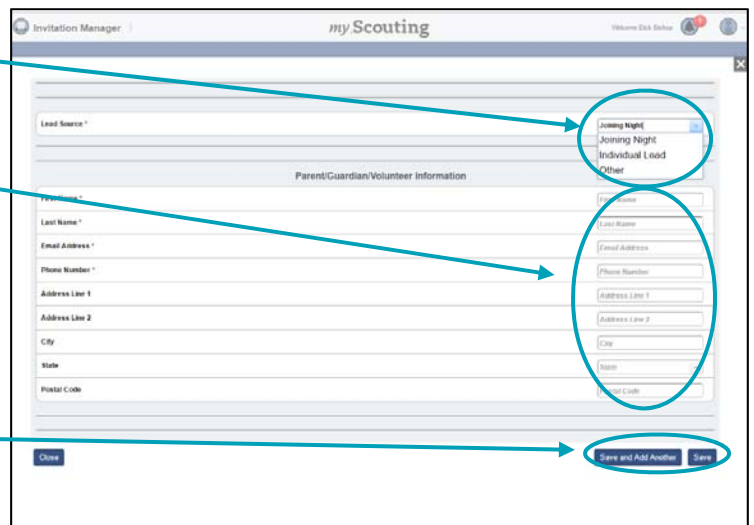
Just copy the one that you want and paste it in your flier or email.

## ADDING LEADS MANUALLY

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



**Step 2:** Select the **Lead Source**.



**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.

## TAKING ACTION ON LEADS

Invitation Manager | myScouting | WELCOME MICHELLE ROMERO

Pack 0228 Reedley Elks Lodge #2699

NEW LEADS		OPENED LEADS	
0-7 DAYS	0	0-7 DAYS	1
8-15 DAYS	1	8-15 DAYS	2
16-23 DAYS	0	16-23 DAYS	0
24-31 DAYS	0	24-31 DAYS	0
32-60 DAYS	0	32-60 DAYS	0

ACTIVE LEADS BY SOURCE

1 New Lead

Reports

Leads: 5 Total | Select Multiple

- Barney Fife** (333) 333-3333 | Opened
- Howard Sprague** (333) 333-3333 | Opened
- Helen Crump** (333) 333-3333 | Opened
- June Cleaver** (444) 444-4444 | New
- Aunt Bea Taylor** (333) 333-3333 | Opened

To take action on a lead, first **click on the name of the applicant**. This can be done from the My Actions tab, the By Source tab, or from the New or Open sections in the By Status tab.

0228

LEAD ACTIONS

Current Status: Opened

Review the Lead Information below before clicking one of the following options.

**Send Invitation** | Reassign | Close Lead

LEAD NOTES

Post

LEAD INFORMATION

**Barney Fife**  
 Phone: (333) 333-3333  
 Email: claudia.hanks@scouting.org

It's important that you review the summary section first before taking any action to ensure there aren't any questions that need to be answered.

Once you've reviewed the summary section and are ready to send an invitation to register, click the **Send Invitation** button.

0228 Reedley Elks Lodge #2699

**Invitation to join the Boy Scouts of America!**

Dear Andy Taylor,

We're excited you're interested in building an adventure with the Scouting organization listed above. Within Scouting, you'll find dynamic and engaging programs that offer life-changing experiences in the areas of character development, leadership, citizenship and adventure...not to mention fun! To get started, please click the application link below:

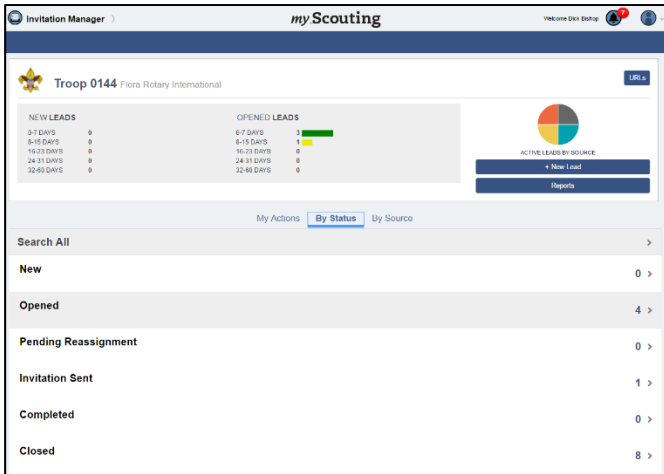
[Click here to start your application](#)

If you need assistance in completing the application, please reach out to the Member Care Contact Center at [myscouting@scouting.org](mailto:myscouting@scouting.org) or (972)580-2489. We'd be happy to assist!

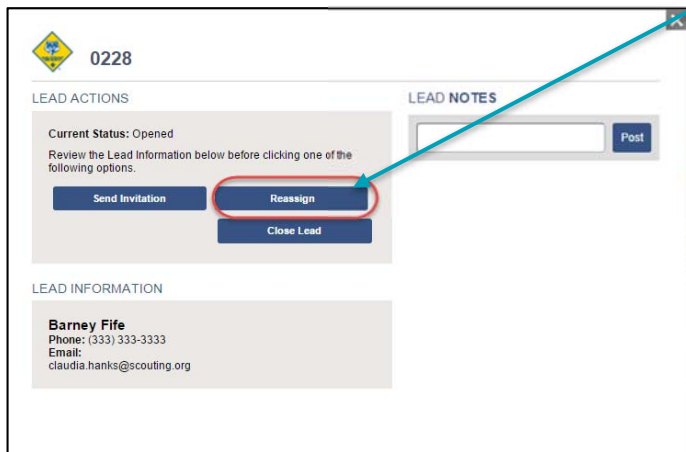
Once your registration has been processed, you will receive an email with contact information, a membership card, and additional details about Scouting.

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

An invitation will be sent to the requestor and you will be returned to the My Actions tab.

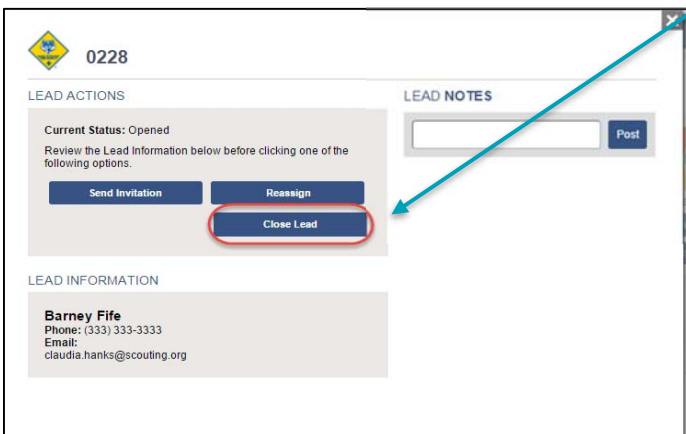


The lead request is removed from your My Actions tab and placed in the Invitation Sent category under the By Status tab.



If you decide not to accept this person into your unit you can **Reassign**. When you do this:

- 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.



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

- You already have a paper application

You have talked with the person and they no longer want to join your unit.

Selecting **Close Lead** will remove the request from your My Actions tab and place it in the Closed category under the By Status tab.

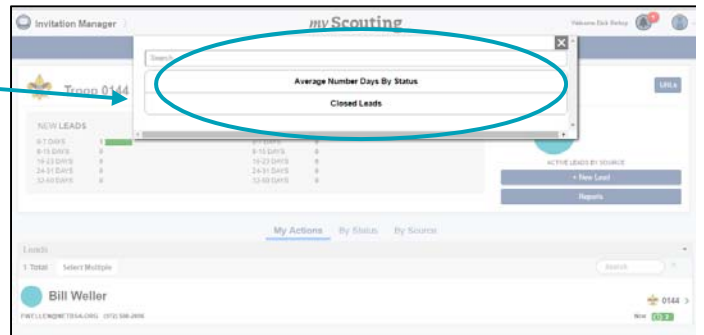
You can always reopen the closed request which will return it to the My Actions tab.

## INVITATION MANAGER REPORTS

**Step 1: Select Reports.**



**Step 2: From the drop down list, select the report you would like to view.**



**Step 3: Print or download the report. The report can be downloaded in CSV format by clicking on the spreadsheet icon at the top of the report.**

The screenshot shows the 'Closed Leads Report' for Troop 0144. A green 'X' icon with 'CSV' text is circled in blue, with a blue arrow pointing from the text 'Step 3: Print or download the report...' to it. The report table is as follows:

Requester Full Name	Request Date	Request To	Request Closed Date	Closed Description
	08/22/2016	Troop 0144	10/22/2016	Timed Out
	08/22/2016	Troop 0144	10/22/2016	Timed Out
Thomas TestLead	08/04/2016	Troop 0144	10/04/2016	Timed Out
JoiningNight Troop	08/04/2016	Troop 0144	10/04/2016	Timed Out
IndividualLead Troop	08/04/2016	Troop 0144	10/04/2016	Timed Out
OtherLead Troop	08/04/2016	Troop 0144	10/04/2016	Timed Out
	07/10/2016	Troop 0144	09/09/2016	Timed Out
	07/10/2016	Troop 0144	09/09/2016	Timed Out

## 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.

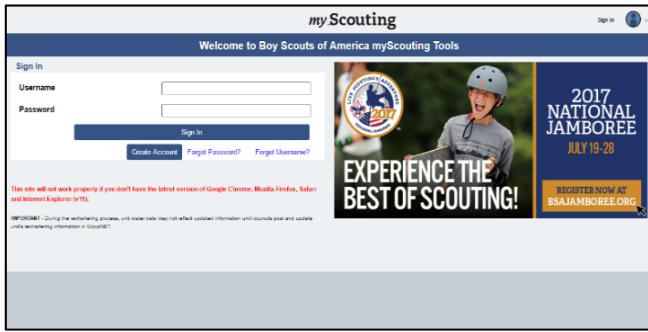
Unit Position	Actions
Chartered organization representative (CR)*	<ul style="list-style-type: none"> <li>Review and accept or reject unit's adult leader applications. This is the only role that can accept or reject adult applications.</li> <li>Reviews and accepts or rejects unit's Venturing adult participant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

\* 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 taking action on applications in a timely manner:

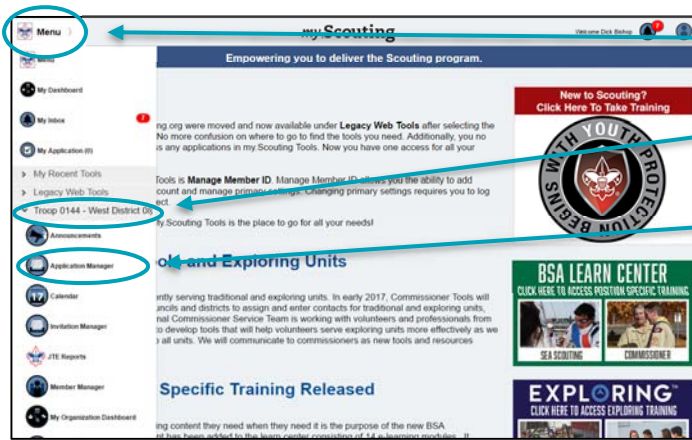
- Unit membership chair, and
- Registration Inquiry (go to page 11 for instructions on assigning this functional role.)

# USING APPLICATION MANAGER

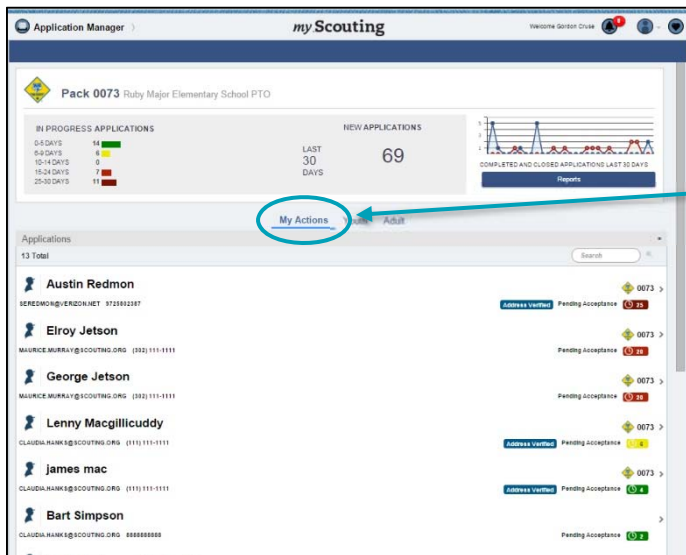


## OVERVIEW

To view and act on applications that have been submitted to your unit, you'll want to log in to [my.scouting.org](http://my.scouting.org).

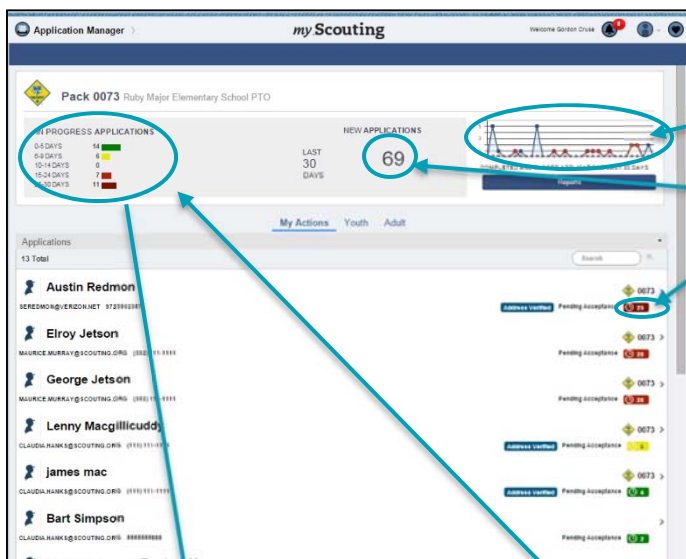


- Select **Menu**.
- Select your **unit name** in the drop down list.
- Select **Application Manager**.



Your unit's Application Manager dashboard defaults to the My Actions tab.

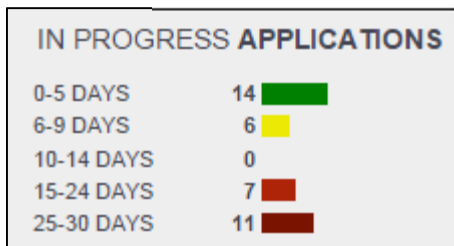




**In My Actions** you will see

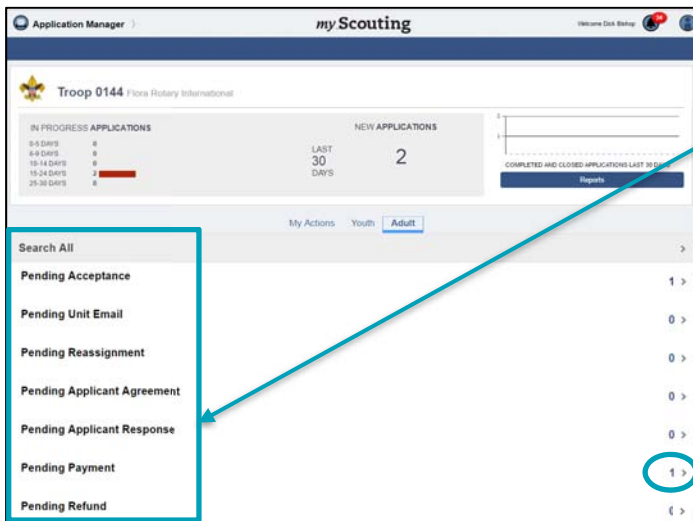
- A breakdown of the applications that were either completed or closed over the last 30 days.
- The number of new applications received in the last 30 days.
- A clock showing the age of the application in the system. The system defaults to the oldest submission being shown first.

The application is tracked through the system for 30 days, after which the application is timed out and removed from the list. That is why the view is always of the last 30 days. This is to encourage units to take timely action.



- Under **In Progress Applications** you'll see how many applications fall into each phase of the timer.

Note that this count will likely be more than the number of applications you see on your My Actions screen because it also shows items for which you have taken action, but are still in pending status.

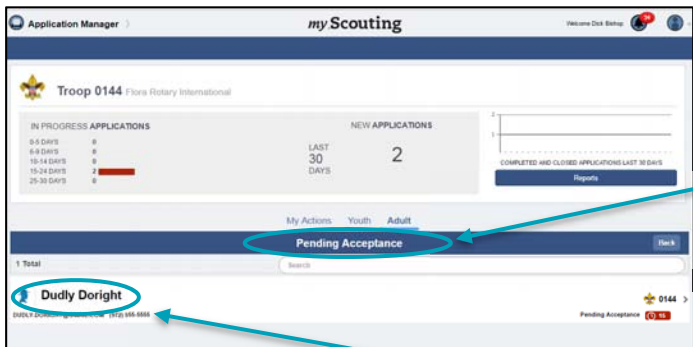


In the **Youth** and **Adult** tabs you will see a list of the different statuses that the applications can be in depending on the actions you have taken:

- Pending Acceptance
- Pending Unit Email
- Pending Reassignment
- Pending Applicant Agreement
- Pending Applicant Response
- Pending Payment
- Pending Refund
- Pending Review
- Pending Acknowledgement (Adult tab only)
- Completed
- Closed

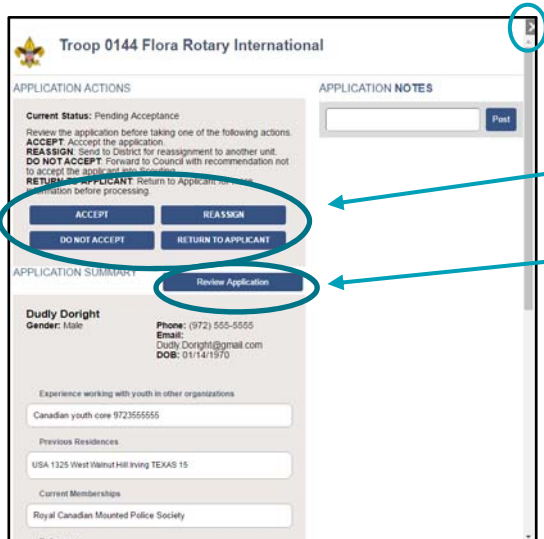
Next to each of the statuses, you'll see the number of applications in that status.

Clicking on a status title will display the unit's applications that are in that particular status.



Here we have clicked on the Pending Acceptance status. You will notice the listing of applicants in this status looks very much like they did under your My Actions tab.

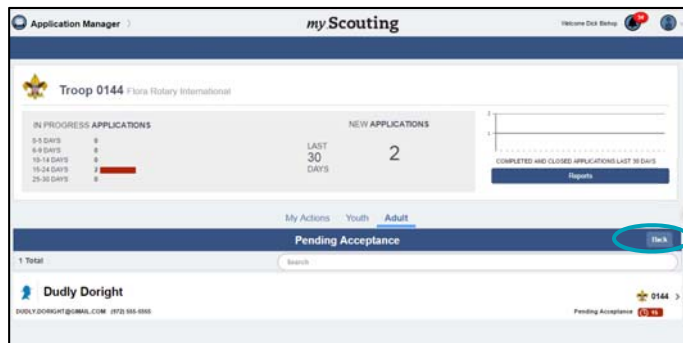
To see the **details** of a record just click on the applicants name.



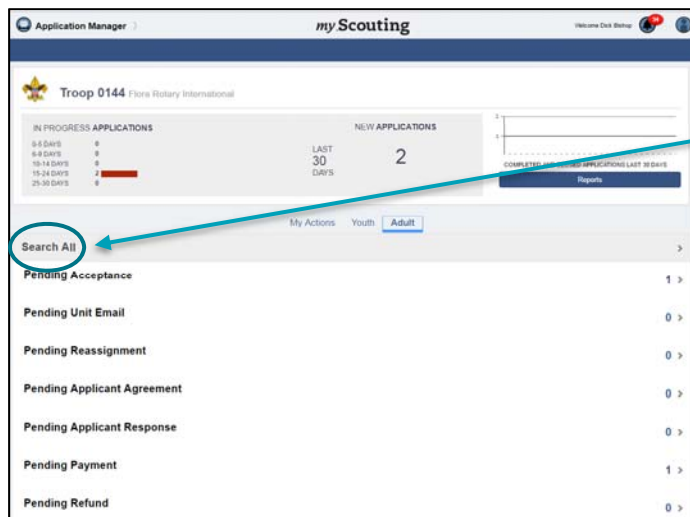
If it is a record that you can act upon, you'll see the action buttons. In this example the applicant is pending acceptance so you can see the blue action buttons and can take action from this screen.

You can also open the application and review the information from this screen.

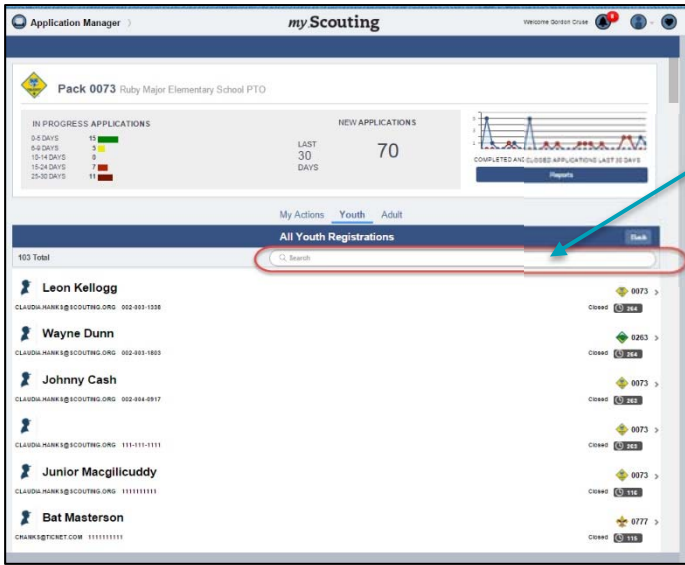
To **Close the record** click the x in the upper right hand corner. You will return to the Application Manager Dashboard.



Click the **Back button** on the blue header bar to return to the list of statuses.



To search for a specific applicant use the **Search All** feature.



Enter your search criteria in the **Search** field to filter the results.

Again, if you have a record that you can act upon, you'll see the action buttons when you open it.

If it is not one of your actionable items, you can still review the application and leave notes.

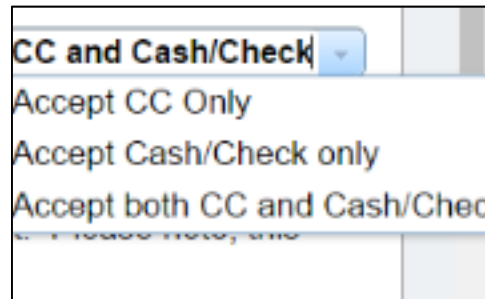
Click the x in the upper right hand corner of the record to close it and bring you back to the Application Manager Dashboard.

## UNDERSTANDING PAYMENT OPTIONS

Payment options were set up by your unit administrator 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 system administrator can tell you which options your unit or council has chosen. If nothing was chosen the system will default to accept cash/check only.

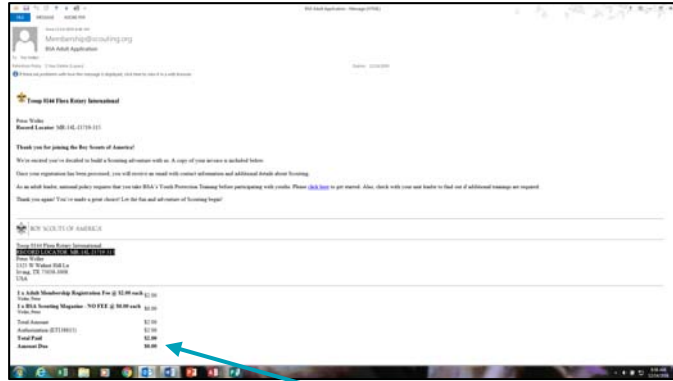


Pro-rated fees collected through online registration include only:

- Registration fees
- Boy's Life subscription fees

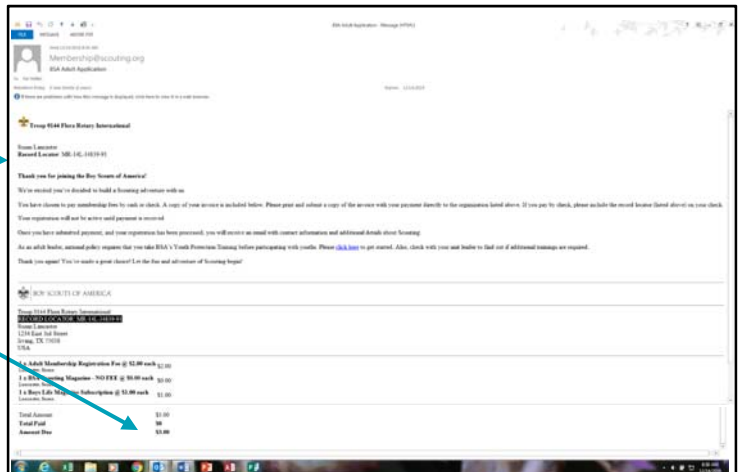
**Unit fees are not collected by the system;** however, a generic message about unit fees is included in the checkout screen. "Uniforms costs and other other resources are not included. There may be additional fees payable directly to your unit. Please contact your unit to learn more."

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.

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.**
2. **Application Actions.**
3. **Review Application.**
4. **Application Summary** – which also displays the Invoice where you can see if payment has been made.

First you'll want to review the application. Click **Review Application**.

0073

Thanks for your interest in Boy Scouting! Fill out this form to join the unit you have selected. When you are finished click submit and we will review your details.

If you have any questions about the program or our application process, email us at [membership@scouting.org](mailto:membership@scouting.org)

Steps to Complete your Registration (All Steps Must Be Completed)

- Step 1 - Parent/Guardian Information Completed
- Step 2 - Youth Information Completed
- Step 3 - Terms and Conditions Completed

Status: Pending Acceptance

First Name: Lenny

Last Name: Macgillicuddy

Record Locator: MR-B19J-P3608-107

[Back](#)

Click on each step to review the information provided in that step.

While you can see all of the information, you cannot change anything.

Click "Done" at the bottom of that page when you have finished reviewing the information.

Once you have reviewed the information in all of the steps, then click "Back" to return to the Application Actions page.

my.Scouting

Pack 3144 Flora Lions

APPLICATION ACTIONS

Current Status: Pending Acceptance

Review the application before taking one of the following actions:

- ACCEPT:** Accept the application.
- REASSIGN:** Send to District for reassignment to another unit.
- DO NOT ACCEPT:** Forward to Council with recommendation not to accept the applicant into Scouting.
- RETURN TO APPLICANT:** Return to Applicant for more information processing.

[ACCEPT](#) [REASSIGN](#)  
[DO NOT ACCEPT](#) [RETURN TO APPLICANT](#)

APPLICATION NOTES

[Post](#)

APPLICATION SUMMARY [Review Application](#)

David Baden-Powell  
 School: Jinnery Elementary  
 Grade: 2nd Grade  
 Gender: Male  
 DOB: 05/11/2005

Invoice

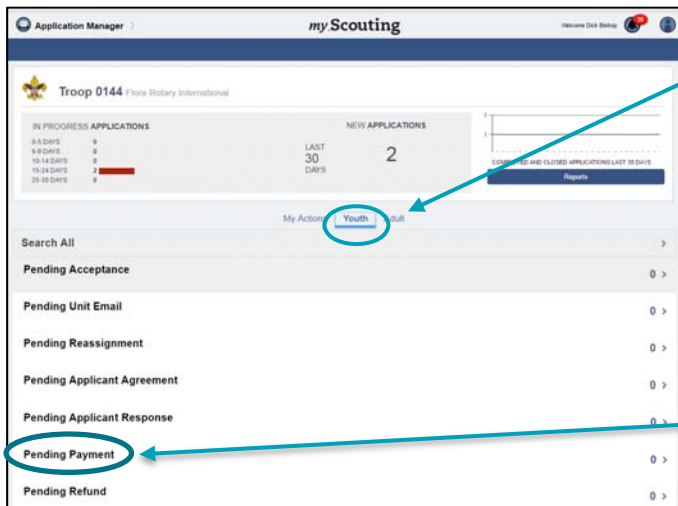
Robert Baden-Powell  
 49 N High St  
 Romney, WV 26757-1618  
 USA  
 Pack: 3144 Flora Lions  
 RECORD LOCATOR: MR-27J-P1244-18

Now you are ready to use one of the actions available and add any notes. **If you want to add notes, they must be added before you select your action.** These notes will not be seen by the applicant but will be tied to the application.

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.

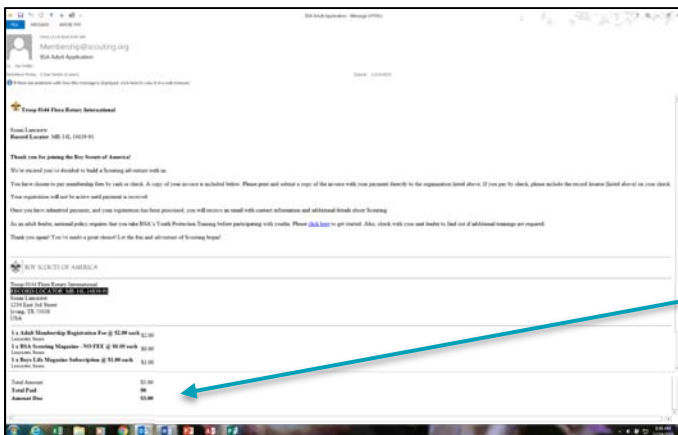
If you are ready to add this youth to your unit, click **Accept**.



The application moves out of your **My Actions** section and into your **Youth** tab.

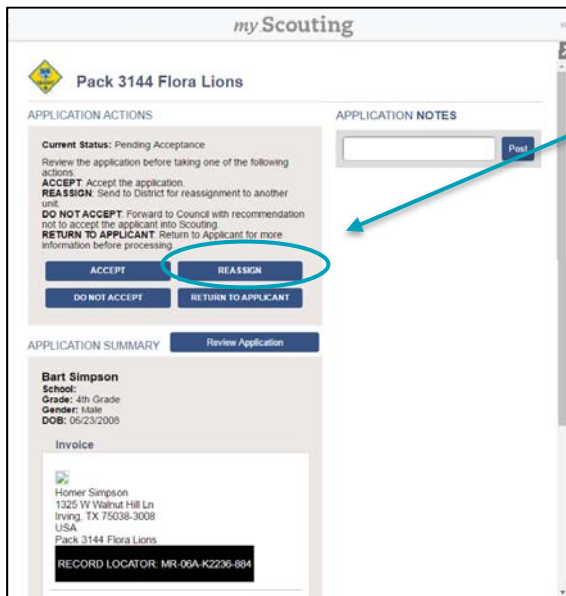
If the new member has already paid their fees online, the system will automatically email them their onboarding materials and assign them to your unit. You have no further action to take besides welcoming them to your unit.

If the new member has not paid their fees online, they will be moved to **Pending Payment** on the Youth tab and 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 record locator, so it needs to be turned in to the council with the registration fee that is stated on the invoice. Turn the invoice and the payment in to the council as you would a paper application so that the registrar can finish the registration process. **(The unit cannot prorate or change the fee on the invoice.)**

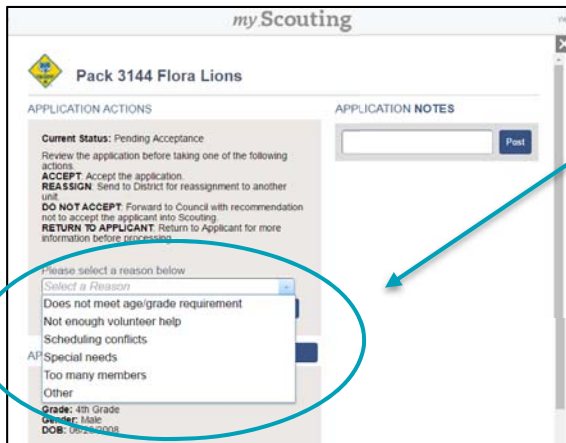


It is important to point out that the 30 day clock does not reset, it just continues. So, you need to follow up on receiving the payment before this clock stops at 30 days.

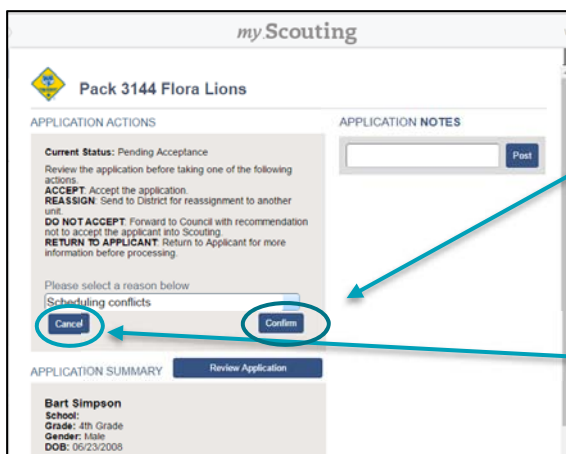




If you receive an application, and your dens have too many boys and you cannot create another den, or if the applicant decides that your unit is not the right one for them, you will need to click **Reassign**. Don't forget to add any notes before you click on Reassign.

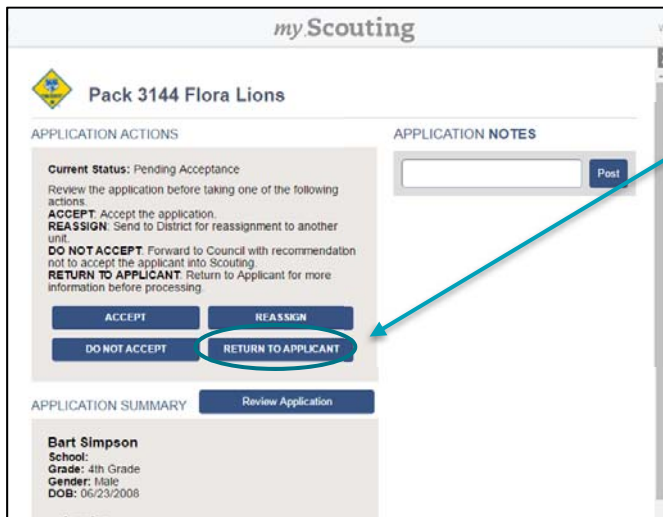


Select a reason for the reassignment request from the list provided. This will be used for reporting purposes.



Once you have selected the reason, click **Confirm** and the application will be moved from your My Actions tab to your Youth tab under Pending Reassignment. And, the application will be sent to the district to reassign to another unit.

Clicking **Cancel** returns you to the original Application Actions page so that you can take a different action.



If you have an application that requires additional information or you have questions, click **Return to Applicant**.

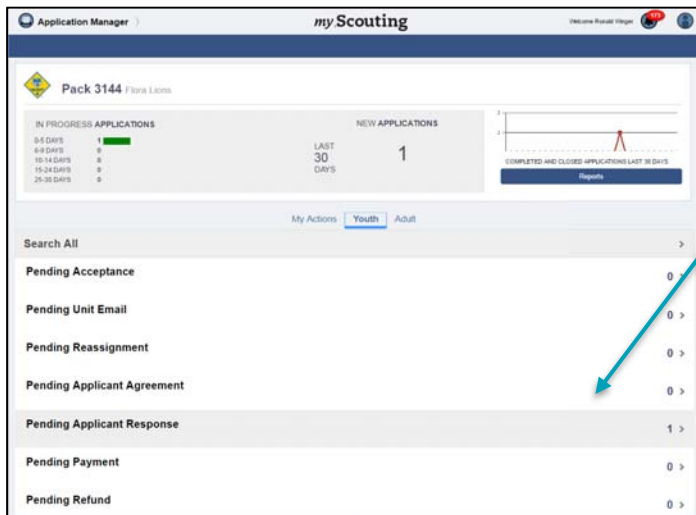


Enter instructions, comments or questions for the applicant in the text box provided. This information will be included in the email forwarded to the applicant requesting the additional action needed.

**Note:** You are limited to one paragraph. If you add a return the information you type after the return will not be included in the email.

Remember, application notes you enter can be seen by others in your unit who have access, but will not be seen by the applicant. To keep others in your unit informed about your actions you might want to make a note that you have requested more information and why.

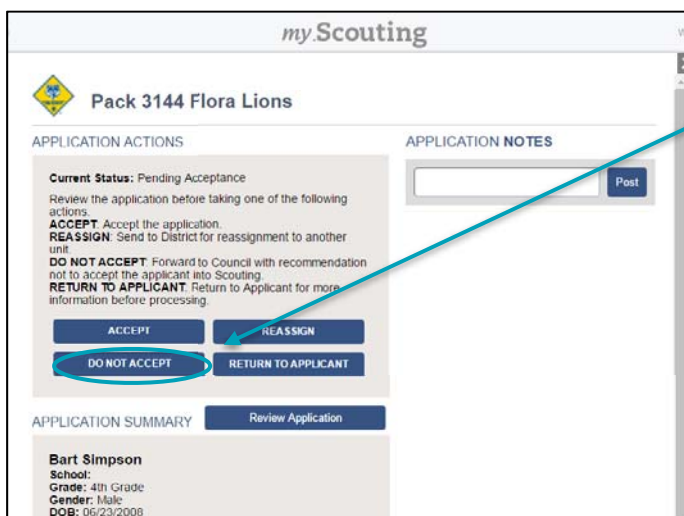
Once you have entered your instructions or questions for the applicant, click **Confirm**.



The application is removed from your My Actions section and added to your **Youth** tab. An email with instructions on how to access the application is sent to the applicant and the application is now in a status of **Pending Applicant Response**.

Applications in Pending Applicant Response status can be edited by the Applicant or the unit Key 3. Also, the unit Key 3 still has access to the Accept, Reassign and Do Not Accept actions. Edits to information can be made as long as it does not result in changes to the shopping cart. For example, the applicant nor the Key 3 can add or remove a Boys' Life Subscription. If items in the cart need to be changed, the application must be withdrawn by the applicant and a new submission made with the correct payment amounts.

Remember, the 30 day clock keeps ticking so you'll want to keep an eye out for an applicant's response and reach out to them to make sure they got your message if you don't hear from them within a couple of days.



The last option you'll 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**.

**Pack 0073**

**APPLICATION ACTIONS**

**Current Status:** Pending Acceptance

Review the application before taking one of the following actions. Accept the application (ACCEPT), send to District for reassignment to another unit (REASSIGN), Forward to Council with recommendation not to accept the applicant into Scouting (DO NOT ACCEPT), Return to Applicant for more information before processing (RETURN TO APPLICANT).

By selecting this option, you are recommending to the Council that the applicant not be accepted into Scouting in any unit. The Council may contact you to understand your reasoning for making this recommendation.

Cancel Confirm

**APPLICATION NOTES**

Post

**APPLICATION SUMMARY**

**Bart's Unknown Brother Simpson**  
 School:  
 Grade: 2nd Grade

If you select **Do Not Accept** you will receive a **warning message** “By selecting this option, you are recommending to the Council that the applicant not be accepted into Scouting in any unit. The Council may contact you to understand your reasoning for making this recommendation.”

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

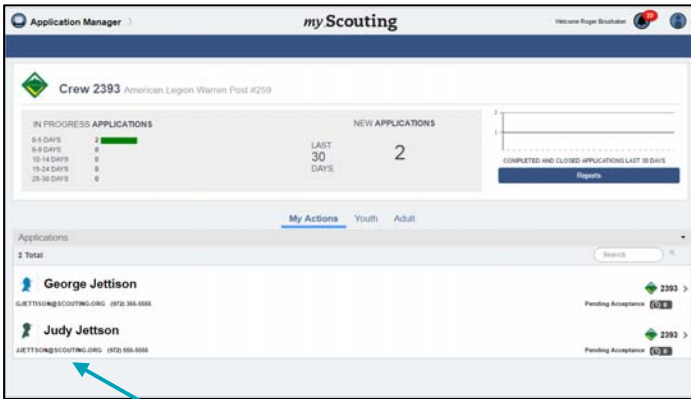
Click **Confirm** (clicking **Cancel** will return you to the original Applications Actions for you to choose a different action).

Clicking Confirm will send the application to the council and returns you to your applications dashboard,

My Actions	Youth	Adult
Search All	>	>
Pending Acceptance	0 >	>
Pending Unit Email	0 >	>
Pending Reassignment	0 >	>
Pending Applicant Agreement	0 >	>
Pending Applicant Response	1 >	>
Pending Payment	0 >	>
Pending Refund	0 >	>
<b>Pending Review</b>	<b>0 &gt;</b>	>
Completed	1 >	>
Closed	7 >	>

The application will be available under the Youth Tab under **Pending Review** status until the Council takes action to either Not Accept or Reassign to the District for reassignment to a different unit.




## PROCESSING ADULT/ADULT PARTICIPANT APPLICATIONS



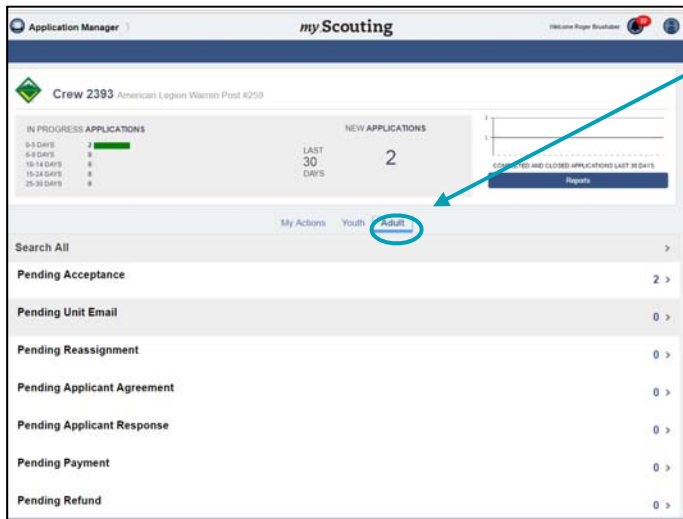
Processing Adult applications is very similar to Youth applications. However, adult application actions can only be processed by the **Charter Organization Representative (CR)**. The Committee Chair can make position recommendations to the CR if the unit has chosen that option in the system configurations.

Like the Youth application dashboard, the Adult application dashboard has the 30 day clock to adding notes and processing the application.

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

-  Youth
-  Venturing Participant
-  Adult

When in the **My Actions** tab, you can click on the name of the adult applicant to open the application.



You can also view adults in all status categories by going to the **Adult** tab

In this view you can see applications that are:

- **Pending acceptance** – the unit needs to review the applications and make a decision to accept, reassign, or decline the applicant.
- **Pending a unit email** – the application has been accepted and is awaiting a nightly process that sends out the email welcome messages.
- **Pending reassignment** – applicants have been reassigned from your unit to the district and are awaiting district action. The unit cannot take action when the applicant is in this status.
- **Pending Applicant Agreement** – applicants have been reassigned to another unit and the unit is awaiting applicant agreement to the reassignment.
- **Pending Applicant Response** – applicants have been sent a message from the unit asking for additional information or clarifications. You can still take action on applicants in this status.
- **Pending Payment** – the applicant has been accepted by your unit and selected to pay by cash or check. The unit must collect this money and turn it in, along with the invoice showing the record locator, to the council office for processing so that the application can be completed and a welcome packet can be sent
- **Pending Refund** – the applicant paid by credit and has either withdrawn their application, was not accepted by the unit, or has timed out of the system. The council must initiate the refund.

This tab can provide you with a shortcut to only see the adults that you are required to process under Pending Acceptance.

- **Pending Review** – the applicant was not accepted by your unit and is awaiting council action to either reassign them to another unit or deny their application and refund any money paid.
- **Pending Acknowledgement** – (adults only) the applicant answered “Yes” to at least one screening question, was accepted by the unit, has paid, and has been onboarded. This is just a council notification so that they are aware an applicant with a “Yes” answer has been accepted.
- **Completed** – applicant has been onboarded and all welcome emails have been sent.
- **Closed** – applications in this status have been closed because the applicant withdrew their application, the unit did not accept them, the application timed out, or the applicant turned in duplicate applications.

**myScouting**

**Troop 0144 Flora Rotary International**

**APPLICATION ACTIONS**

**Current Status:** Pending Acceptance  
 Review the application before taking one of the following actions.  
**ACCEPT:** Accept the application.  
**REASSIGN:** Send to District for reassignment to another unit.  
**DO NOT ACCEPT:** Forward to Council with recommendation not to accept the applicant into Scouting.  
**RETURN TO APPLICANT:** Return to Applicant for more information before processing.

**APPLICATION NOTES**

**APPLICATION SUMMARY**

**Peter Weller**  
 Gender: Male  
 Phone: (972) 580-2096  
 Email: Pweller@netbsa.org  
 DOB: 07/25/1964

**Screening Results**

**Has your drivers license ever been suspended or revoked?**  
 Yes  
**Explain**

As a 20 year old I failed to show for a hearing and they temporarily suspended my license until the matter was cleared up.  
**Comments**  
 Enter comments here

**Experience working with youth in other organizations**  
 Church Youth Leader

Once you have opened an application, the **Application Summary** will provide additional information you will need to check references and see quickly if the applicant answered “Yes” to any of the screening questions.

**Screening Results**

**Has your drivers license ever been suspended or revoked?**  
 Yes  
**Explain**

As a 20 year old I failed to show for a hearing and they temporarily suspended my license until the matter was cleared up.  
**Comments**  
 Enter comments here

**Experience working with youth in other organizations**  
 Church Youth Leader

**Previous Residences**  
 USA 1325 West Walnut Hill Irving TEXAS 12

**Current Memberships**  
 First Church of Irving

Applicants that answered “Yes” to any of the **Screening Questions** can still be accepted.

**However, you are required to enter your reasons for acceptance** in each of the Comments fields provided for the Screening Questions before you can click the Accept button.

**APPLICATION ACTIONS**

**Current Status:** Pending Acceptance  
 Review the application before taking one of the following actions.  
**ACCEPT:** Accept the application.  
**REASSIGN:** Send to District for reassignment to another unit.  
**DO NOT ACCEPT:** Forward to Council with recommendation not to accept the applicant into Scouting.  
**RETURN TO APPLICANT:** Return to Applicant for more information before processing.

ACCEPT REASSIGN  
 DO NOT ACCEPT RETURN TO APPLICANT

**APPLICATION NOTES**

Comment on: DL.Suspend ... Talked with Peter and he has no other problems.

Post

**APPLICATION SUMMARY**

**Peter Weller**  
 Gender: Male Phone: (972) 580-2096  
 Email: Pweller@netbsa.org  
 DOB: 07/25/1964

**Screening Results**

Has your drivers license ever been suspended or revoked?  
 Yes Explain  
 As a 26 year old I failed to show for a hearing and they temporarily suspended my license until the matter was cleared up.  
 Comments  
 Talked with Peter and he has no other problems..

Experience working with youth in other organizations  
 Church Youth Leader  
 Previous Residences

Notice that the comments entered for the Screening Questions are recorded in the Application Notes.

**References**

William Beckett (972) 580-3456  
 Melinda Ross 9723556789

**Invoice**

Peter Weller  
 1325 W Walnut Hill Ln  
 Irving, TX 75038-3008  
 USA  
 Troop 0144 Flora Rotary International  
**RECORD LOCATOR: MR-14L-I3719-315**

1 x Adult Membership Registration Fee @ \$2.00 each Weller Peter	\$2.00
1 x BSA Scouting Magazine - NO FEE @ \$0.00 each Weller Peter	\$0.00
<b>Total Amount</b>	<b>\$2.00</b>
Authorization (ET138815)	\$2.00
<b>Total Paid : \$2.00</b>	
<b>Amount Due</b>	<b>\$0.00</b>

In the **References** section you will find 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.

You will also see the **invoice information**.

- If they have paid by credit card you will see \$0.00 in the Amount Due at the bottom of the invoice.
- If they have selected pay by cash or check you will see an amount due to your unit. You must collect that amount listed on the invoice along with a copy of the invoice to turn in to your council with your payments.



If you would like to review the application further, you can select **Review Application** to view all of the fields in the application

my.Scouting

Troop 0144 Flora Rotary International

APPLICATION ACTIONS

**Current Status:** Pending Acceptance

Review the application before taking one of the following actions.  
**ACCEPT:** Accept the application.  
**REASSIGN:** Send to District for reassignment to another unit.  
**DO NOT ACCEPT:** Forward to Council with recommendation not to accept the applicant into Scouting.  
**RETURN TO APPLICANT:** Return to Applicant for more information before processing.

APPLICATION NOTES

Dick N Bishop Wed Dec 14 2016 12:58 pm  
Comment on: DL Suspend – Talked with Peter and he has no other problems.

Dick N Bishop Wed Dec 14 2016 12:57 pm  
Called references and they find him to be of good character and recommend him for our committee.

ACCEPT REASSIGN  
DO NOT ACCEPT RETURN TO APPLICANT

APPLICATION SUMMARY

**Review Application**

**Peter Weller**  
Gender: Male  
Phone: (972) 580-2096  
Email: Pweller@netbsa.org  
DOB: 07/25/1964

Select the information to review by clicking on the step containing the information

0144 Flora Rotary International

Thanks for your interest in Boy Scouting! Fill out this form to join the unit you have selected. When you are finished click submit and we will review your details.

If you have any questions about the program or our application process, email us at [membership@scouting.org](mailto:membership@scouting.org).

Steps to Complete your Registration - (All Steps Must Be Completed)

Step 1 - Volunteer Information	Completed ✓
Step 2 - Background Information	Completed ✓
Step 3 - Disclosures & Authorizations	Completed ✓
Step 4 - Terms and Conditions	Completed ✓

Status Pending Acceptance

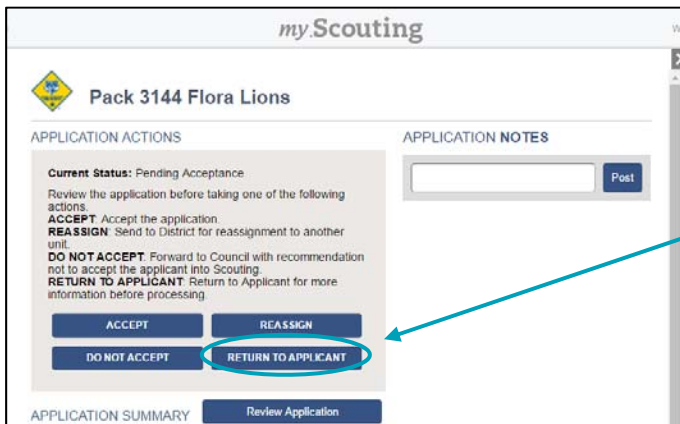
First Name Peter

Last Name Weller

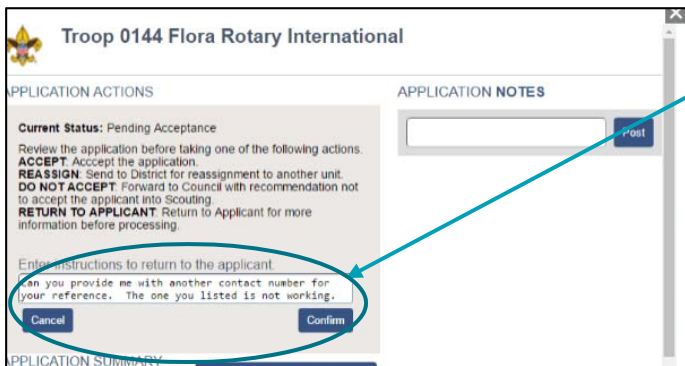
Record Locator MR-14L-43719-315

**Back**

When you have finished reviewing the information you can select the **Back** button to return to the main screen.



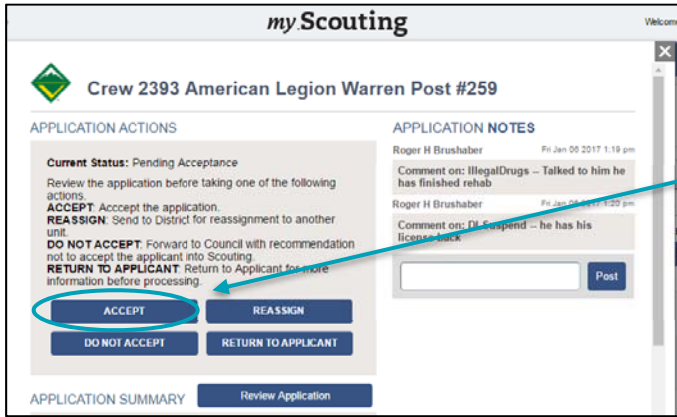
After reviewing the application, if you still need more information you can either call the applicant directly or you can select **Return to Applicant** which will send a message that you need more information.



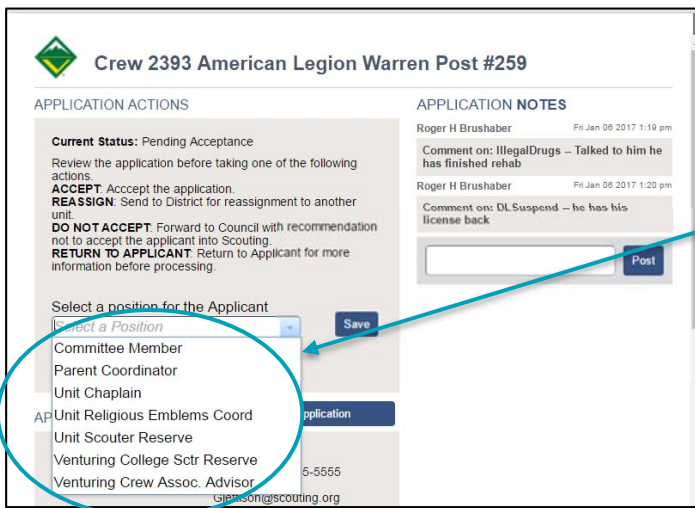
When you select Return to Applicant, a message box will appear. Type your request in the space provided and an email with your message will be sent to the applicant. Note: you must enter your message in one paragraph. Words typed in an additional paragraph will not show on the email message.

### Example Message



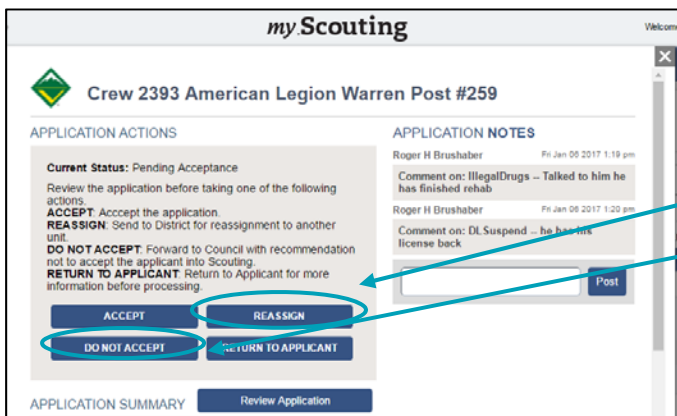


If you are ready to accept the adult, you can now choose the **Accept** Button.

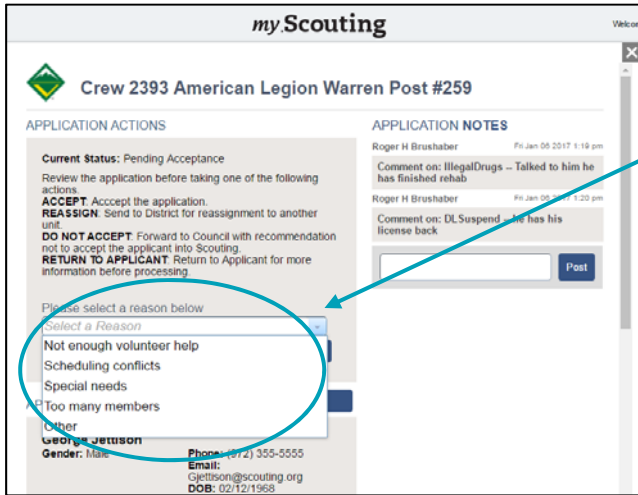


A list of available positions for the unit will be provided for selection. **Select the position** for which this applicant will serve. Press **Save**.

The applicant will move out of your Actions dashboard and into either Pending Payment (if they selected cash option), Pending Unit Email, or Completed status in the Adult tab on your Application Manager dashboard.

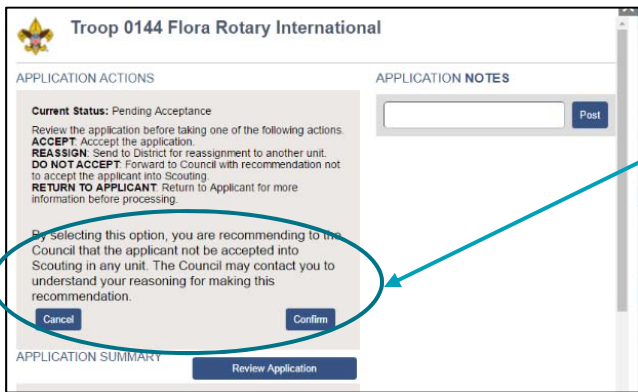


If you do not want to accept the adult, you can choose either **Reassign** or **Do Not Accept**.



If you select **Reassign:**

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

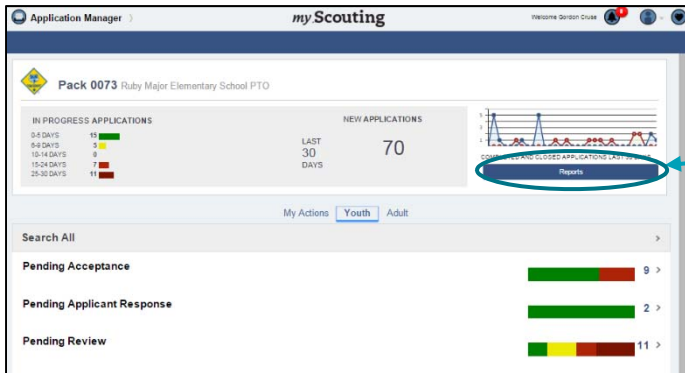


If you select **Do Not Accept:**

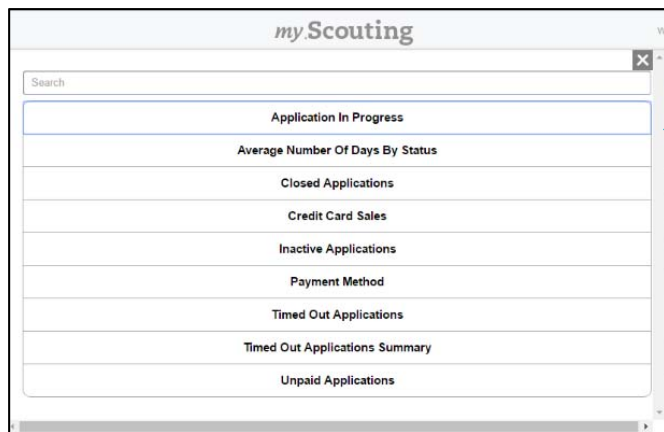
- You will be asked to confirm you selection.
- You will get a message that the council may contact you to learn your reason.

Once your selection is made you will see the applicant move out of your My Actions dashboard and into one of the other adult statuses depending on what you selected.

## APPLICATION MANAGER REPORTS



To view and download reports available through the system select **Reports**.



A list of reports available will show. Select the report you would like from the list.

Reports will be viewed in a spreadsheet format with columns and rows. Below is the **Payment Method Report**. It 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.

**Payment Method Report**  
Troop 0144

Download CSV

Application Type	Applicants Full Name	Parent/Guardian Name	Assigned Position	Phone Number	Email Address	Applied To Org Type	Applied To Org	Applied To Context	Current Status	Owned By	Date Accepted	Record Locator	Amount Paid	Amount Unpaid	Payment Method
V	Peter Weller		Committee Member	(972) 580-2096	Pweller@netbsa.org	Troop	Troop 0144	West District 08	Pending Unit Email	Troop 0144	12/14/2016	MR-14L-13719-315	\$2.00	\$0.00	Credit Card
V	Susan Lancaster		Parent Coordinator	(972) 580-1234	Pweller@netbsa.org	Troop	Troop 0144	West District 08	Pending Payment	Sagamore Council 162	12/14/2016	MR-14L-14839-91	\$0.00	\$3.00	Check/Cash

1 - 2 of 2 results

If the unit is only interested in seeing applicants who owe them registration fees, the **Unpaid Applications Report** will provide that information.

All reports can be downloaded into a CSV format by clicking on the green and white spreadsheet icon at the top of the report. The resulting download will automatically open in Excel.

**Unpaid Applications Report**  
Troop 0144

Download CSV

Applicant Full Name	Parent/Guardian	Assigned Position	Phone	Email	Org	Org Type	Date Accepted	Application Conf #	Amount Due
Susan Lancaster		Parent Coordinator	(972) 580-1234	Pweller@netbsa.org	Troop 0144	Units	12/14/2016	MR-14L-14839-91	3

1 - 1 of 1 results

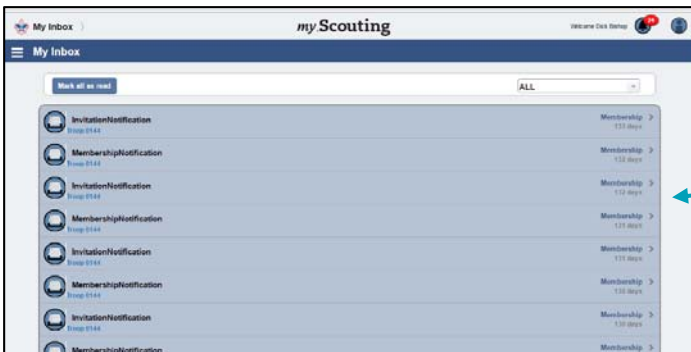
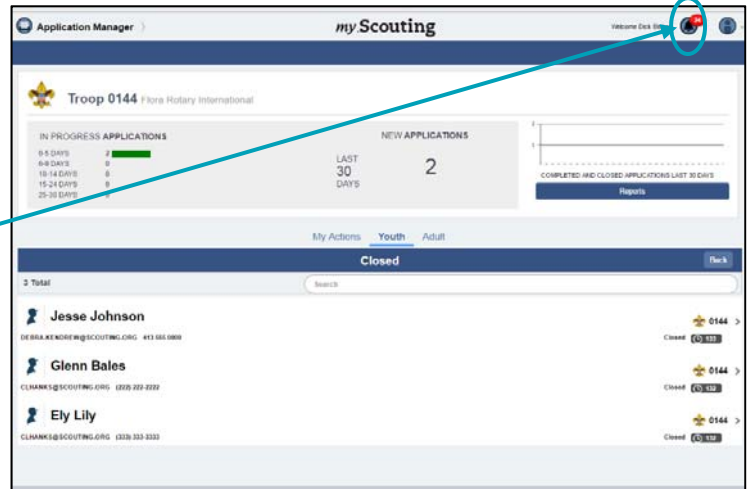
## NOTIFICATIONS

The system also sends the Unit Key 3 notifications so that they can take action on inquiries and applications in the system.

The bell at the top of your My.Scouting page is the **notification icon**.

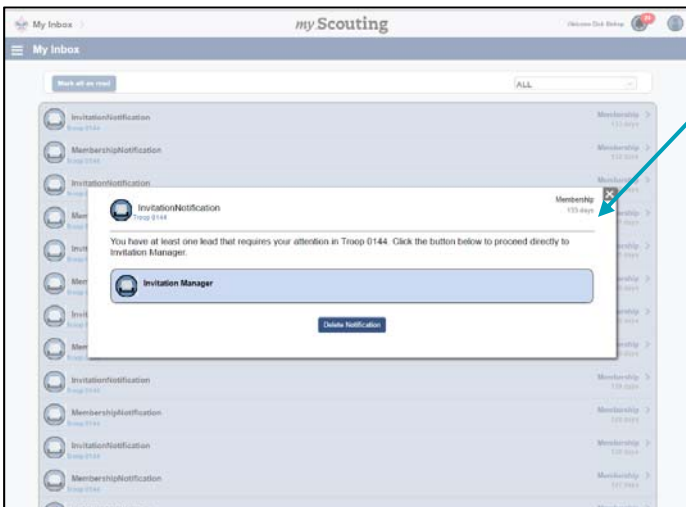
If you have notifications, a red circle with the number of notifications will display.

You will also receive email notifications twice a week if you have actions to take.



Click on the bell icon to open your notifications or you can open it through your menu on the top left hand side of the screen.

You will see a list of notifications. Open the notifications by clicking on the title.



The message will pop up in a box that you can read and delete or mark as read. You can click the Invitation Manager or Application manager button that is provided in each notification to go directly to that tool.

Hint – Eliminate the red circle from your notifications icon so that you only see new notifications. You will need to delete the notification or mark them as read, otherwise they will continue to show as pending notifications each time you log in.