Online Registration
COUNCIL & DISTRICT GUIDEBOOK

July 2018
Online Registration Council & District Guidebook

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UPDATE YOUR MY.SCOUTING TOOLS PROFILE
ADD Membership@scouting.org TO YOUR EMAIL SAFE SENDER LIST TO RECEIVE INVITATION AND APPLICATION UPDATES.

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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 directly 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 personal email and their My.Scouting inbox twice a week letting them know they have actions to take. They can also select actions such as “Reassign to District” or “Do Not Accept” which the district or council will then need to act on.

Council and District level volunteers can also submit their applications for paid or multiple positions through the online registration system and be accepted electronically by the council.

At the council level, you will be able to view all the applications and leads for the council, district, and units. At the district level, you will be able to view all applications and leads for your district and those units in your district.

WHAT DOES THE REGISTRATION TOOL DO?

There are three parts to the tool:

1. Invitation Manager:
   - Collects information from potential new Scouts that come in through BeAScout;
   - Helps units manage leads from joining nights and from individual referrals;
   - Allows units to send invitations directly to interested families with a link to the application that is specific to their unit; and
   - Allows districts and councils to send invitations to become a volunteer at the district or councils level.

2. Digital Application: *
   - Electronic application that collects all the data needed to register;
   - 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 unit’s Committee Chair to review the adult application and make recommendations for adult positions;
   - 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.
Can also be used by the council or district to register volunteers in paid positions within their district or council organization.

- Allows the council to review and accept or reject applications for council and district level volunteers with an electronic signature from the Scout executive or designee.

* 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/organization level 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.
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 and log in.

If you do not have an account you can create one 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 then select My Account from the dropdown menu.

SET UP PROCESSES

VERIFY COUNCIL AND DISTRICT REGISTRATIONS

Access to tools in My.Scouting are role based; therefore, the roles and organization level in which professionals and volunteers are registered will determine what tools they can access through the system.

Council level professionals and volunteers must be registered at the council level. District level professionals and volunteers must be registered in the districts in which they serve so that they have access to the online registration tools that help them manage unit registrations and act on items in that district organization.

UPDATING BEASCOUT COUNCIL SETTINGS

Check your council configurations for BeAScout to ensure that you have enabled the correct functions for units to turn their pins to active.

Step 1: Log in to MyBSA and select Membership from the menu bar at the top of the home page.

Step 2: Select BeAScout from the list, then select Administration.
Step 3: Select District Emailing List Utility. There must be an email address in each of the districts listed. (Note: This email address will not be used by the online system, but the BeAScout system will not work if an email address is not in each district – it can be the same email address for all.)

Step 4: Select Council Join Status tab and set Join Status to Active.

UPDATING UNIT BEASCOUT PINS FOR FAMILY SCOUTING

The Scout Executive, council admin, district registration support, and registrar can update the Family Scouting setting on a unit’s BeAScout pin:

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 dropdown menu select your council name.
Step 3: Select Organization Manager – you may have to scroll down using the grey bar on the side of the menu.

Step 4: Select the district and drill down to the unit you wish to update.

Step 5: Go to the Settings tab for that unit.

Step 6: Change the Family Scouting settings to opt-in, effective date, and the type of pack – Boy only, Girl only or Both Boys and Girls.

CONFIGURING THE ONLINE REGISTRATION SYSTEM FOR YOUR COUNCIL

Before your council starts using the online registration system, there are some configuration decisions that the council must make. The Scout executive or the Registration Support designee has access to make changes through the Organization Manager tool in My.Scouting.

CONFIGURATION OPTIONS

Configurations that your council can make include:

- **Payment options** – Council can select the payment option that they would like all units to use or they can let the unit select the payment option they wish to use.
- **Council onboarding URL** – Councils can include a URL to the page that they would like new youth and adults to go to upon acceptance into a unit. This is the place to welcome new families and adult leaders and let them know what your Council has to offer.
• **Adult application availability** – this configuration allows the council to turn on or off the availability of the adult volunteer and adult participants (Venturers age 18-20) applications online. The youth application will always be available through the system.

• **Automated application and lead reassignment to the district** – the council can configure the system to automatically reassign applications or leads to the district when they are not acted upon by the units. This configuration will send leads that have not been acted upon after five days and applications after 8 days. This functionality is intended to allow councils to facilitate action so that a potential new member is not lost.

• **SE system notifications opt out** – this configuration allows the Scout executive to opt out of receiving the twice weekly notifications of actions pending in the online registration system. This option can only be selected if someone is assigned to the Registration Support role.

**SETTING YOUR COUNCIL’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 dropdown menu select your council name.
Step 3: Select Organization Manager – you may have to scroll down using the grey bar on the side of the menu.

Step 4: Select the Settings tab.

Step 5: Set configurations:
- **Unit Payment options:** Select the payment option you want all units to use or allow the units to determine the payment options they wish to use. Default is “Unit may choose payment option.”
- **Council Onboarding URL:** Input the URL to your council’s Welcome page for new members. This URL will be included in the Welcome email that is sent upon unit acceptance of new youth or adult applications.

- **Adult Application Availability:** If the council wants to control adult application availability for all units, they can use the setting to turn them on or off. This will also turn off the adult participant application for Venturers who are 18 or over. Default is “Allow unit to choose.”

- **Auto reassign function:** If you would like applications to be automatically reassigned to the district if the unit does not process it within 8 days and leads to move to the district if they are not acted upon by the unit within 5 days you can opt-in here. “Opt-out” is the default.

- **SE System Notification Opt Out:** If the Scout executive does not wish to receive the twice weekly notification of actions opt out here. Default is “Opt-in.”

**Step 6:** Select **Commit** to save all your settings.
UPDATE THE COUNCIL’S CONTACT INFORMATION IN SCOUTNET

To ensure that your council’s information is up-to-date and displays accurate information on BeAScout, please check and update your council ScoutNET information. If a unit’s pin in BeAScout is not turned on, the council’s address, telephone number, and website that you have included in ScoutNET will be displayed.

Step 1: Login to MyBSA

Step 2: Select the ScoutNET tab on the homepage.

Step 3: Select Program from the list on the left-hand side of your screen.
Step 4: Choose System Administration from the program screen.

Step 5: Select BSA Structure Detail under System administration.

Step 6: Query to find your council.
Step 7: Use the tabs to update and save information. Check your address, telephone number, and internet URL.

REGISTRAR/ADMIN PROCESSES

PROCESSING PAYMENTS

Online applications where the applicant has selected to pay by cash or check will be processed by the council. Applicants are being asked to remit the receipt showing the record locator to the unit with payment. This receipt should be turned in by the unit with the unit payment the same way they turn in paper applications.

To process the payment, you will log in to My.Scouting and select Application Manager.

Applicants with Payments Pending will show in the My Actions tab.

If your My Actions tab contains many records, you can search by putting the record locator number or the person’s name in the search field.
You can also go to the **Youth** or **Adult** tab and select **Pending Payment** to view all the records in the Pending Payment status.

To mark as paid select **payment received**.

This will move the applicant out of pending payment status and into acknowledge status if they had any “yes” answers to the screening questions or into completed status.

This will also add the volunteer to the district or council roster and trigger the welcome email that will be automatically sent to the new volunteer.

**PROCESSING CREDIT CARD REFUNDS**

Refunds may be given to applicants using a credit card if an applicant is not accepted into Scouting; if the application was closed within the system by the unit, district, or council; if the applicant withdraws their application; or if the application timed out of the system.

Once the application has been processed and the person has been accepted into Scouting the same policies on refund that apply to processed paper applications apply to applications processed through the online system.

To process credit card refunds, you will log in to **My.Scouting** and select **Application Manager**.

Applicants needing a refund can be viewed in the **My Actions** tab. Select the person by clicking on their name and the refund screen will pop up.
If your My Actions tab contains many records, you can search by putting the record locator number or the person’s name in the search field.

You can also go to the Youth or Adult tab and select Pending Refund to view all the records in the Pending Refund status.

When the record opens select Initiate CC Refund.

The record for the refund will move out of the refund status on the dashboard. You will see the message that the refund was approved.

MEMBERSHIP VALIDATION

The “Payment Method Report” available through the Application Manager tool on My.Scouting will provide the information needed for membership validation for youth, adult participants, and adult volunteers who apply through the online registration system. Instructions for downloading and printing the “Payment Methods Report” can be found on page 46 of this guidebook.

To follow more sustainable practices, individual applications entered through the online system should not be printed for the unit files. These applications are stored electronically and will follow the retention policies of the organization.

For paper applications, you receive, you should continue to follow the required registration and retention policies.

REGISTRATION SHARED SERVICES COUNCILS

If your council uses Registration Shared Services from the National Service Center and you want to opt your Scout executive out of receiving emails, you must have a council professional assigned to the Registration Support functional role. This person will be delegated authority to review and accept adult applications for council or district positions, as well as acknowledging “Yes” answers to screening questions. Adult leader acceptance cannot be delegated to Registration Shared Services.
**INVITATION MANAGER**

**KEY COUNCIL ROLES AND ACTIONS IN INVITATION MANAGER**

The following council level positions have **full access** to the Invitation Manager Dashboard on My.Scouting where they can add leads, and send joining invitations:

- Council Key3 (Scout executive, council president, council commissioner)
- Assistant/borough Scout executive
- Director and assistant director of field service Field director
- Director support services
- Council admin (employee staff position having equivalent council Key 3 access, assigned in PAS)
- Registration support (a functional role assigned by the council Key 3 on My.scouting.org)

The following council positions have **read only** rights to view leads or submitted requests to ensure districts and units are following up on leads and invitations in a timely manner:

- Council membership committee chair
- Council membership committee member
- Registration inquiry (a functional role assigned by the council Key 3 on My.scouting to other volunteers or staff who need read only access to view lead status.)

**KEY DISTRICT ROLES AND ACTIONS IN INVITATION MANAGER**

The following district level positions have **full access** to the Invitation Manager Dashboard on My.Scouting where they can add leads, and send joining invitations:

- District Key 3 (district executive, district committee chairman, district commissioner)
- Senior district executive
- District director
- District membership committee chair

The following positions have **read only access** to view leads or submitted requests to ensure units are following up on leads and invitations in a timely manner:

- Assistant district commissioner
- District membership committee member
- Registration inquiry (a functional role assigned by the district Key 3 on My.scouting.org)
- Roundtable commissioner
- Unit commissioner
ASSIGNING REGISTRATION INQUIRY AND REGISTRATION SUPPORT FUNCTIONAL ROLES

If your council or district has other professionals or volunteer roles that are not listed above that 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.

If your Scout executive wants to opt-out of emails or wants to delegate authority to accept adult applications at the council and district level, you can assign the functional role of “Registration Support” to the Scout executive’s delegate.

Step 1: If you are one of the Key 3, while logged in to your My.Scouting account, select Menu at the top left hand side of your screen.

Step 2: From the dropdown menu select your council name.

Step 3: Select Organization Security Manager.
Step 4: Select Registration Inquiry or Registration Support from the menu.

Step 5: Select the plus sign.

Step 6: Click the down arrow and select the person from the dropdown list. Only adults registered at the council level will show.

You can set effective and expire dates for this role.

Step 7: Click Save. Person will immediately have access.

Tip: If your Scout executive decides to delegate DE’s the authority to accept district level applications, you will need to multiple the DE (e41) from their district organization into the council organization for them to show on the dropdown menu for “Registration Support” at the council level.
USING INVITATION MANAGER

When logged in at a council level position, you can view leads all the way down to the unit level. You can act on any leads that have been entered at the council or district level.

When you are logged in at a district level you can view leads in your district and for the units in your district. You can act only on the leads that have been reassigned to the district.

Councils and districts can use the lead manager to send invitation with a direct link to the online application for council and district positions. You can send this link to new board or committee positions. The application will allow the person to multiple if they are already registered in another position in the council that has a current paid registration.

OVERVIEW

To input a lead or send an invitation, you will want to log in to my.scouting.org.

Step 1: Select Menu in the upper left corner.

Step 2: Select your council or district.

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 council has opened this record;
- **Opened** – someone in the council 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 at the council or district level that fall under the following statuses:

- **New** - request from BeAScout that have not been opened.
- **Opened** - request has been viewed or entered manually.
- **Pending Reassignment** - request has been sent to council to be moved to a different district or to be reassigned by the district to a 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 council 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.

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.
- Council or district 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.

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 council or district 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** that has been entered for that individual.

**USING URL’S AND QR CODES**

URL’s and QR codes provide links that are specific to each council or district. These can be used on in emails or other collateral used to recruit board and committee members.

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

Just copy the URL or QR code and paste it in your email or other printed piece.
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 a sign-in, you have the option of pressing save and add which will save and clear the form for the next entry.

TAKING ACTION ON LEADS

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

If you do not wish to send an invitation through the invitation system, or you have already contacted the person, you can **close** the lead to take it out of your actions. 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.

If you select **Send Invitation**, 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.
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.
APPLICATION MANAGER

KEY COUNCIL ROLES AND ACTIONS IN APPLICATION MANAGER

The following position can reassign applications to a district, processes refund(s), and processes online applications that are paid by cash or check.

- Council admin

The following positions can take all the same actions as the council admin. Additionally, they have the responsibility of accepting or rejecting adult applications for council and district level volunteer positions, returning applications for more information, and acknowledging a unit’s acceptance of an adult application that answered “Yes” to a screening question,

- Scout executive
- Registration support

The following positions have read only rights to view application activity to ensure districts and units are acting on applications in a timely manner:

- Council president
- Council commissioner
- Assistant/borough Scout executive
- District director
- Sr. district executive
- Director of field service
- Assistant director of field service
- Field director
- Director of support services
- Council membership committee chair
- Council membership committee member
- Key 3 delegate
- Registration inquiry
KEY DISTRICT ROLES AND ACTIONS IN APPLICATION MANAGER

The following positions can act on application reassignments from units to the district, reassign an application to the council for actions to be taken at that level, and view unit activity to ensure units are responding to their applications in a timely manner.

- District Key 3
- District membership committee chair
- Sr. district executive*
- District director
- Field director*
- Director field service*
- Director support service*
- Assistant Scout executive*
- Borough Scout executive*

* Registered at the council level.

The following positions have read only access to view application status to ensure units are acting on applications in a timely manner:

- Assistant district commissioner
- Roundtable commissioner
- Assistant roundtable commissioner
- Unit commissioner
- District membership committee member
- Registration inquiry

If your council or district has other professionals or volunteer roles that are not listed above that need read only access to view leads and submitted requests in Application Manager you can assign them a functional role of “Registration Inquiry” in the system. Instructions for assigning the “Registration Inquiry” role can be found on page 16 of this guidebook.
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 council or district name in the drop-down list.
- Select Application Manager.

Your 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 as well as actions that still need to be taken by units.
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 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 applications that are in that status. This will show not only the applications for which you have responsibility to act, but also those in the districts or units for which you have responsibility.

If you are logged in at the council level and would like to see applications by district just select the district. Units in the selected district will be visible and the dashboard will show information related to that district only.
If you are logged in at the district level, a list of units in that district will show on the left-hand side of the screen and the dashboard will show only totals for your district.

To look down into the applications in the unit, just select the unit by clicking on the unit number.

You can click on one of the statuses to the right and see all the applicants in that status regardless of the unit to which they have applied.

You cannot take any actions on the unit’s behalf. However, you can look at the application and have a conversation with the unit about the application.

To view the application just select the applicant that you wish to open and an application window will open.

The application window shows you the basic youth information as well as showing the receipt and amount owed, if any.

You can review the application in further detail by selecting View Application.

You can also print the application if needed. Applications do not need to be printed for the council or district unit files.

For membership validation, the “Payment Method Report” should be kept in the council unit file along with any paper applications received for that unit. Download instructions can be found in the Reports section of this guidebook.
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.

If it is 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.

**PROCESSING ADULT APPLICATIONS**

Adult applications for Council and District level positions can only be processed by the Scout executive (SE) or the person appointed by the SE who is registered in the Registration Support role.

The adult application dashboard has the 30-day clock for processing the application.

Adult applicants are identified by this icon 👤

When in the **My Actions** tab, you can click on the name of the adult applicant to open the application.
• **Pending Review** – the applicant was not accepted by a 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 the Scout executive is 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.

You can also view adults in all status categories by going to the **Adult** tab. This will show you not only adults which need council or district action, but also those that need unit actions to be taken.

In this view, you can see applications that are:

- **Pending acceptance** – application needs to be reviewed and a decision made 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 to the district and are awaiting district action.
- **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 asking for additional information or clarification.
- **Pending Payment** – the applicant has been accepted 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 or has timed out of the system. The council must initiate the refund.
Actions that are available to you will be shown on the top, left hand side of the screen.

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.

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.

Please Provide all the Screening comments

Got it, thanks!
Notice that the comments entered for the Screening Questions are recorded in the Application Notes.

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. You must collect that amount listed on the invoice along with a copy of the invoice so that you have the record locator number to mark the application as paid.
If you would like to review the application further, you can select **Review Application** to view all of the fields in the application.

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

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

You can also **print** the application if needed.

Councils **do not** need to keep a paper copy of applications submitted through the online system on file. All applications submitted through this system are being stored electronically.
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.

**Example Message**

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.

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

If you select **Accept** you will bypass a step and go directly to assigning their position in the district or council to which they applied.

If you wish to assign the person to a different district or to the council if they applied at the district level, you can press **Accept to District**.
If you choose the **Accept to District** button, you will need to select the organization to which you are assigning this volunteer. **Select the level** by clicking the council or district name and then select **Assign**.

Whether you select **Accept** or **Accept to District**, a list of available positions for the council or district will be provided for selection. **Select the position** in which this applicant will serve. Select **Save**.

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

If you do not want to accept the adult at the council or district level, select **Do Not Accept**.

You should have an offline conversation with this volunteer to inform them you have not accepted them for a council or district level position. If they have paid by credit card, then the refund process will also need to be initiated.
PROCESSING REASSIGNMENTS FROM DISTRICTS OR UNITS

Reassignments can happen if the youth or adult has applied to the wrong unit, the unit has decided that it cannot take the applicant, or the applicant’s schedule is not a good fit for the unit meetings. When this happens, a unit can reassign the application to the district so that the district can find another unit for the applicant. Districts can also reassign applicants to the council level where they can be moved to another district within the council.

Applicants who are pending reassignment can be found on your My Actions tab.
You can click on the name of the applicant to open the reassignment screen.
If the My Actions tab has many applicants listed, you can also to the Youth or Adult tabs, open the Pending Reassignment tab and search the name of record locator to find specific individuals.

If you are logged in at the council level, when you open the record you will have two actions available, Do Not Accept or Reassign Down.

The Do Not Accept option should only be used if all other options to place this applicant in a unit have been exhausted and you need to be able to remove the applicant from the system.
If you are logged in at the council level and select **Reassign Down**, a list of districts in your council will display.

1. **Select the district** to which you wish to reassign the application.

2. Then click on the **Assign** button. It will then show in that district’s dashboard in their My Actions so that they can place the applicant in a unit. It will show in the Council’s dashboard under Pending Reassignment status.

If you are logged in at the district level you have two actions you can take **Reassign Up** – which will move the reassignment to the council to be reassigned to another district, and **Reassign Down** which will reassign the application to another unit.

You also have a place to add notes. These notes will not be seen by the applicant but will be tied to the application.

To add a note, place your cursor in the field, type your message and click **Post**. Whatever is entered here becomes an official and permanent part of the application. Your note will be added, along with your login information and the date. These notes are sorted last to first.

Be sure to add your notes before you click Reassign Down.
When you select **Reassign Down**, the **Select Organization** screen will open.

**Click on the unit** to select the unit to be the new home for the application, and then click **Assign**.

The application moves out of your My Actions and will move to the Unit’s My Actions in **Pending Acceptance** status.

An email will be sent to the Key 3 of the new Unit to alert them of the application assigned to them.
If you are logged in at the district level and select Reassign Up.

You will be prompted to select a reason for reassignment from the drop-down list provided.

Once you have selected the reason, click Confirm. You will be returned to your My Actions tab. The application will be moved from your district My Actions tab to the council’s My Actions tab.

The original applied-to unit will continue to see the application under their Youth tab under Pending Reassignment until the reassigned District places it with a new unit.

Clicking Cancel returns you to the My Actions tab and keeps this applicant in you My Actions tab.
PROCESSING ACKNOWLEDGEMENTS TO “YES” SCREENING QUESTIONS

If an adult applicant answers ‘Yes” to any of the six screening questions, the unit can still accept the applicant, but they must give a reason for accepting the applicant. The applicant is then moved to the council dashboard under Pending Acknowledgement. This allow the council to be aware that this individual has been accepted by the unit.

Adult volunteers who are pending acknowledgement have already been accepted by the unit and have been onboarded.

Their completed application is now in your My Actions tab on the council dashboard. This is just a notification to the council so that you can be aware that the Chartered Organization accepted this individual.

You can also easily find applications that are Pending Acknowledgement in the Adult tab.
When you open the record you can view and print the application. You can also view all of the notes related to the “Yes” answers and the CR’s reasons for accepting the person.

To acknowledge that you have reviewed the application select **Acknowledge**.

The application will be taken out of your My Actions tab and will move to Completed status.

**APPLICATION MANAGER REPORTS**

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

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.

NOTIFICATIONS

The system also sends Key 3 notifications so that they can act on inquiries and applications in the system. Notifications will come to the email address they have listed in their My.Scouting profile, as well as to their My.Scouting page.

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.
The following positions will receive email notifications twice a week if they have actions to take:

- Unit: Unit Key 3 and Unit Membership Chair
- District: District Key 3, District Director, and District Membership Chair
- Council: Scout executive, Assistant Scout executive, Director of Field Service, Field Director, Director Support Service, District Director, Senior District Executive, Council Admin, Registration Support, Council Membership Committee Chair

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.

Tip – 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.