# Internet Rechartering 2.0 User Guide

updated 9/30/2022



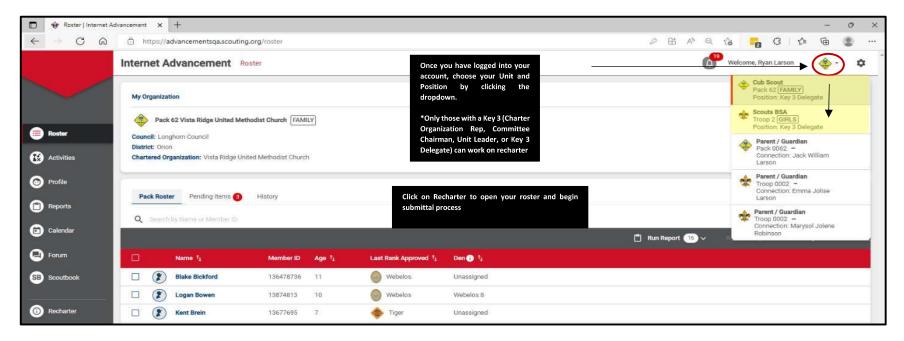
## Internet Rechartering may be accessed by the Unit Leader, Charter Org Rep, Committee Chairman or Key 3 Delegate by logging into their Scoutbook.com or my.Scouting Account or directly at

#### https://advancements.scouting.org/

Note: Be sure to read <u>all</u> the instructions before beginning the recharter process and review the new **Internet Recharter Guide and Timeline** found at <a href="https://www.scouting.org/resources/internet-rechartering/">https://www.scouting.org/resources/internet-rechartering/</a>

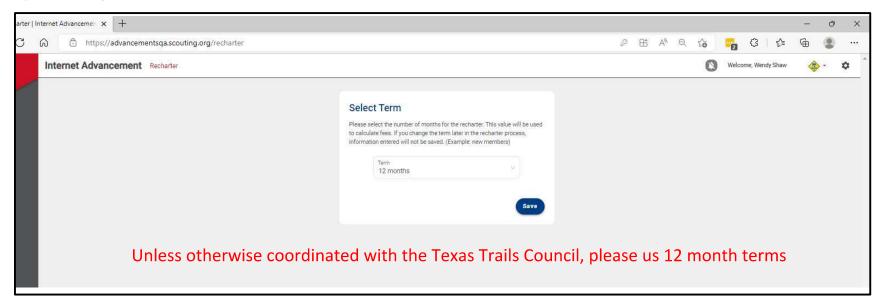


#### **Open Recharter**



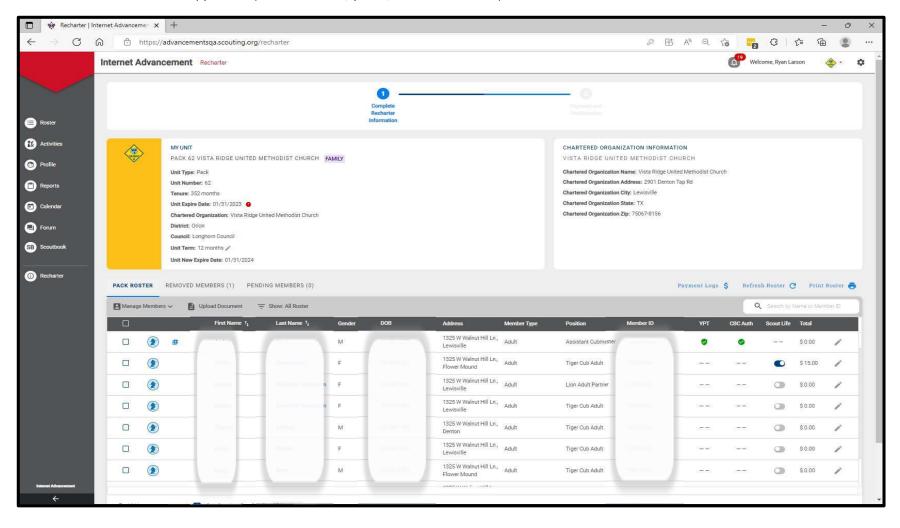
#### Select your recharter term.

Consult with your Unit Commissioner or Council Registrar before selecting another term other than 12 months. If you change the term later after information has been entered, any information previously entered will need to be inputted and uploaded again.



#### Once the roster is loaded, you may start editing the roster

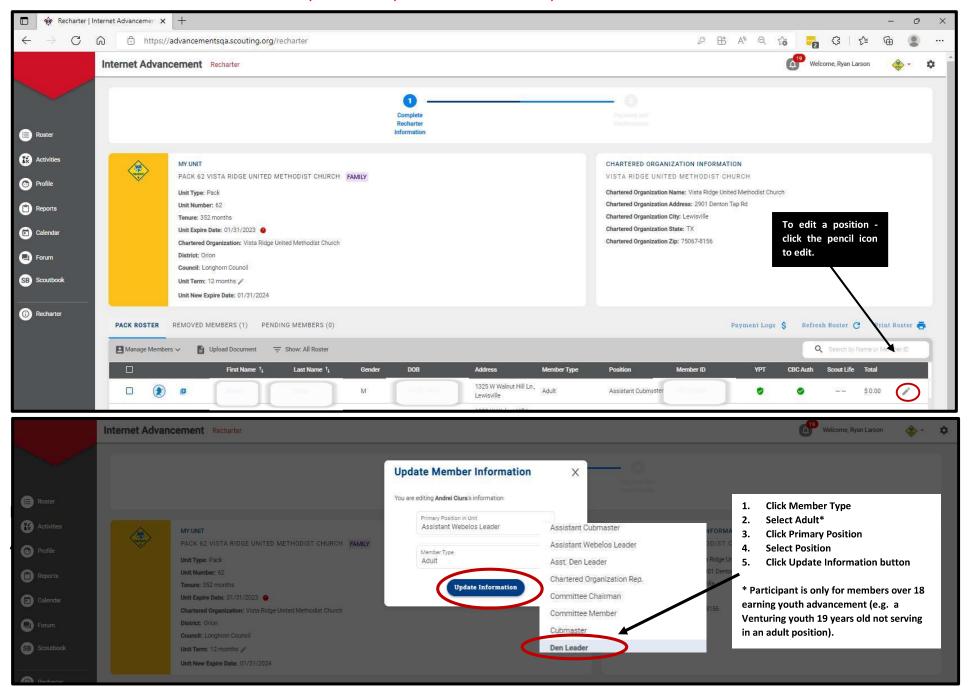
- YPT Red Exclamation Point Youth Protection Training has not been completed and recorded in the person profile or the YPT has expired
- YPT Green Checkmark Youth Protection Training is current
- CBC Auth Green Checkmark New Criminal Background Disclosure has been received and recorded in the person profile
- CBC Red Exclamation Point New Criminal Background Disclosure has not been received
- Scout Life Toggle off No subscription has been added to the registration
- Scout Life Toggle on Subscription has been added to the registration
- No status "- -" Not applicable (New Members, youth, and no fee adults)

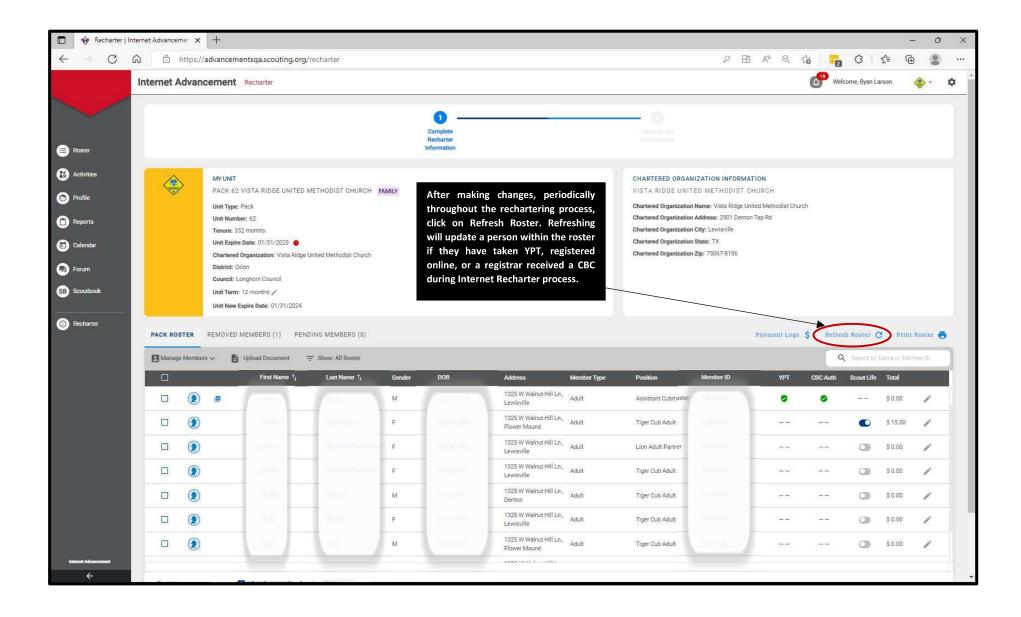


#### Changing an adult leader position

You have the ability to change a position of a leader by clicking on the pencil icon. Choose the appropriate position within the drop down and click update information.

\*\*ANY KEY 3 POSITIONS SUCH AS SCOUTMASTER, CUBMASTER, COMMITTEE CHAIRMAN, OR CHARTER ORG REP MUST HAVE A NEW ADULT APPLICATION\*\*

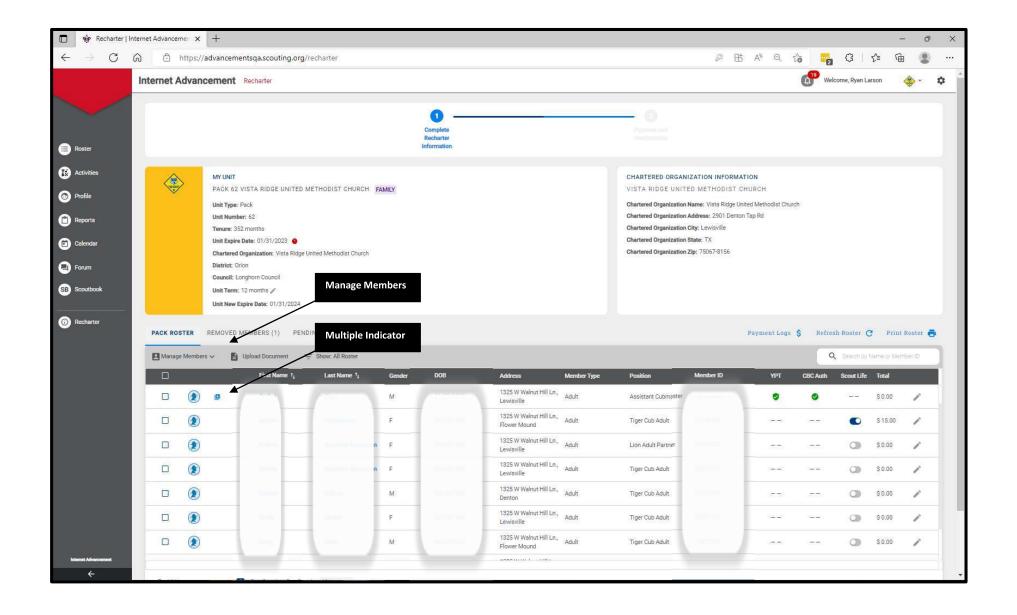




#### **Adding an Existing Member of Another Unit**

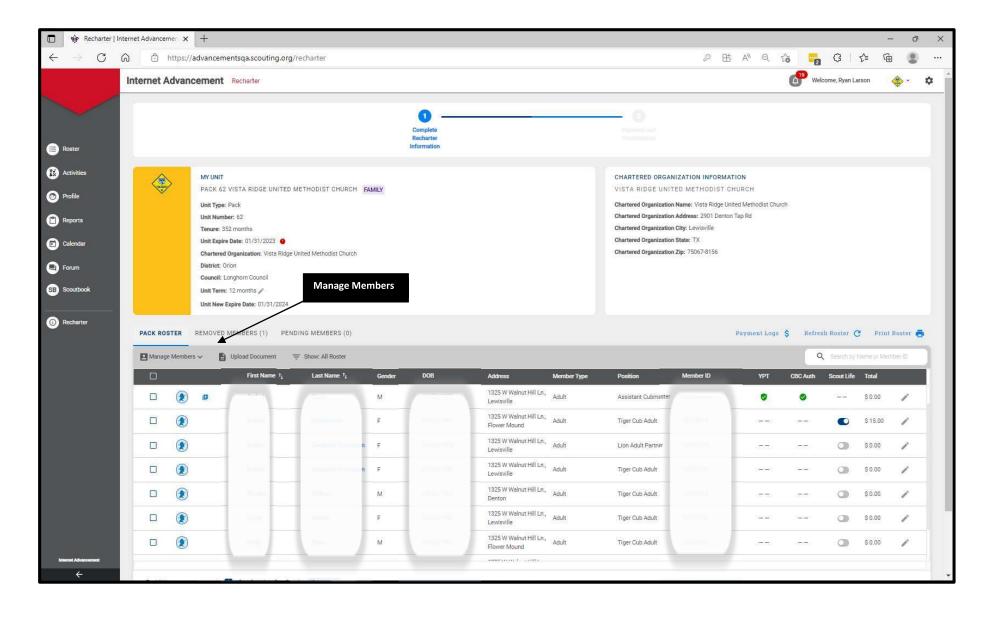
Click on Manage Members>Add New Member>Click Existing Member>Enter all required information>Click the Add Member button. The member will show a "+" by their name to indicate they are paying their registration fees in another unit. If they are paying their registration fees in your unit, click the checkbox by their name>Click Manage Members>Click Unmark as Multiple.

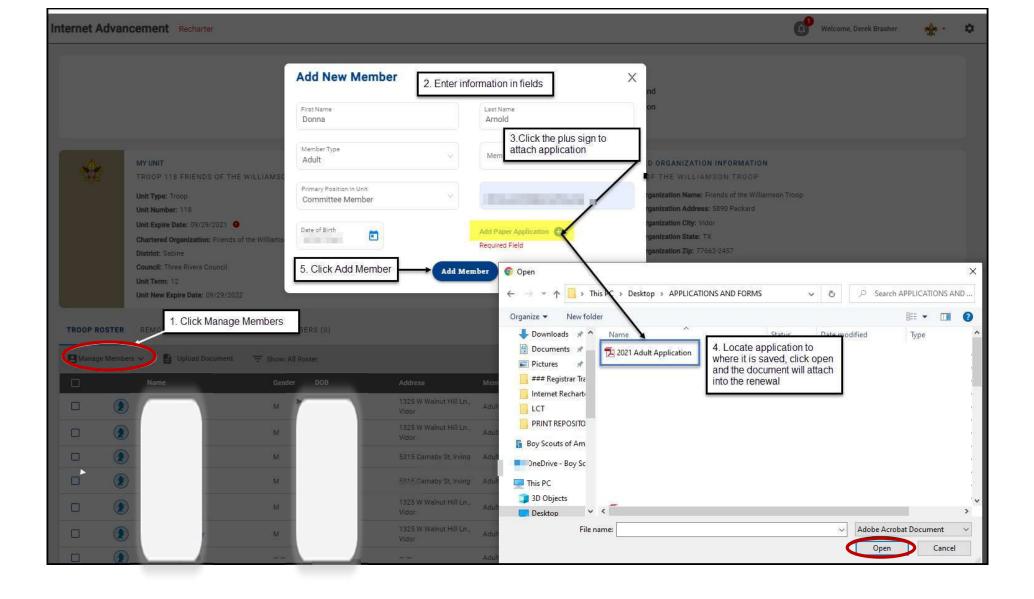
If they are an adult, be sure to add a signed adult application for the new adult member from another unit by clicking the checkbox by their name>Upload Document>Select a file of the application>Click Save



#### **Adding a New Member**

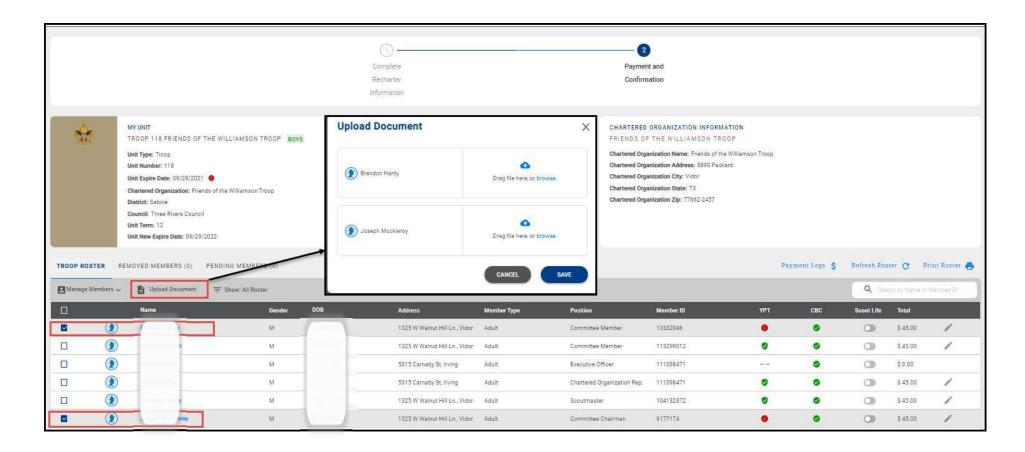
Click on Manage Members>Add New Member>Enter all required information>Click on the "+" sign next to Add Paper Application>Select the file and attach the application >Click the Add Member button.





#### **Uploading a Group of Documents into the Renewal**

A group of documents, perferably in a zip file, can be uploaded into the renewal. They are Adult and Youth Applications, Criminal Background Disclosure Authorizations, Youth Protection Training Certificate, CORI Form and PA background records. Select the individuals that you are uploading documents for by checking the box next to their name and click upload documents. A popup will appear and this is where you load the zip file of documents.



#### **Promoting a Member**

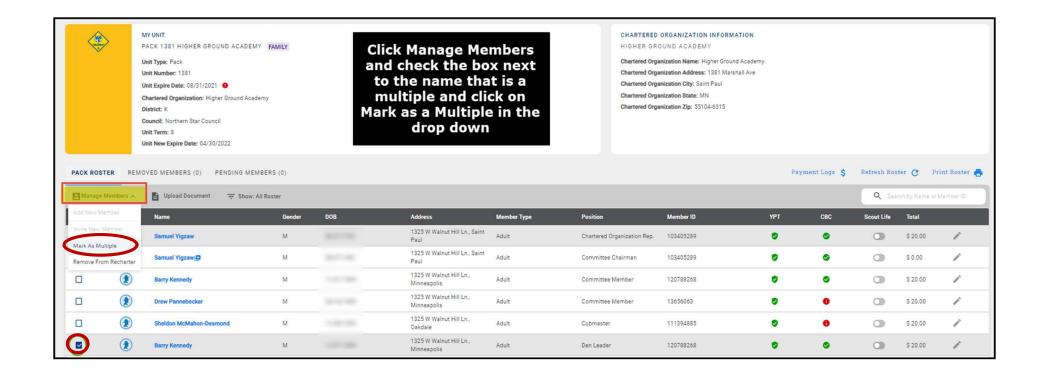
In order to promote a youth member to an adult, a youth member to a participant, or a participant to an adult, you must click the box next to the individual you would like to promote. Click Manage members and follow the instructions listed in this User Guide to first remove the person from the charter. Then add them as a new member with the "New Paper Application" option following the instructions in this User Guide to add a person. You will upload a new application, CBC (if applicable), and YPT (if applicable). The member id for the individual will remain the same.

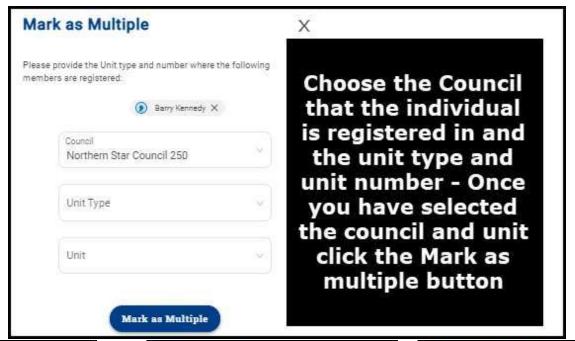
#### **Adding a Multiple**

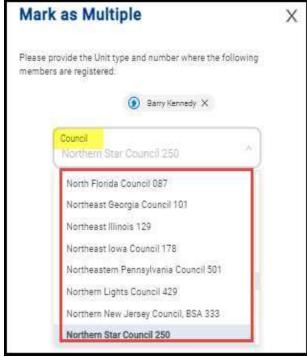
If an individual is paying in another unit, you have the ability to register them in your unit(s) as a multiple and no fee is collected. The unit listed as the multiple unit is the unit they through which they will be paying their recharter fees. If an individual is paying in a council level position, you have the ability to register them in the unit(s) as a multiple and no fee is collected by the unit(s).

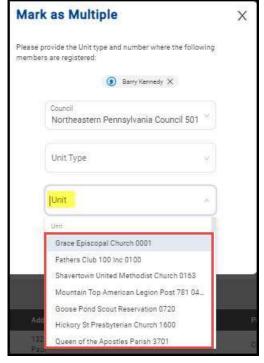
Note 1: For those multipling from a council position select "Non-unit Position"

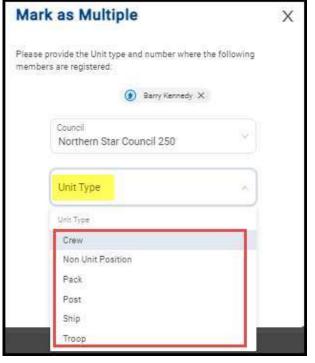
Note 2: The Charter Org Representative is the only individual that can multiple in more than one postion as a committee chair or committee member only. No other adult leaders can multiple in more than one position within the same unit.





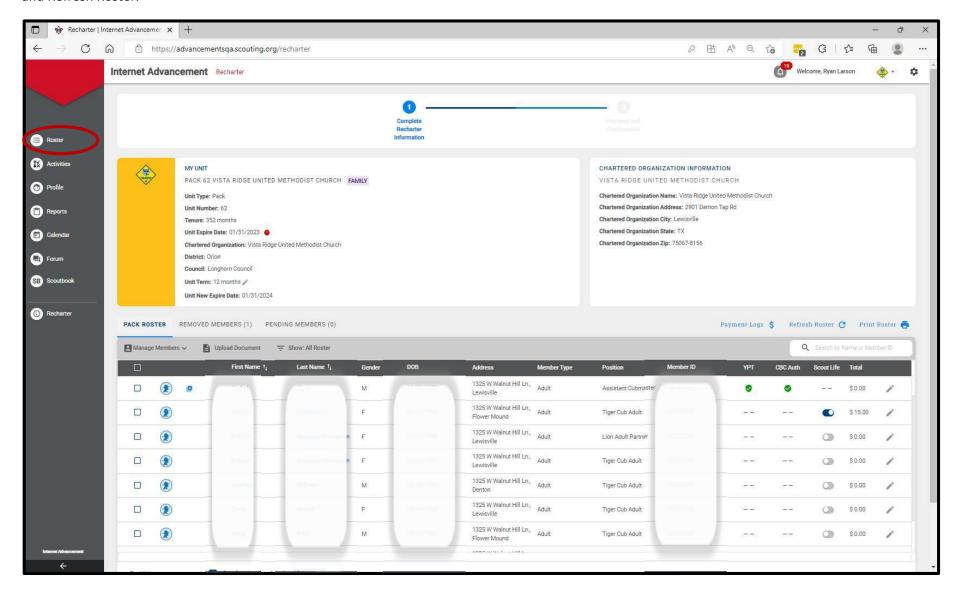


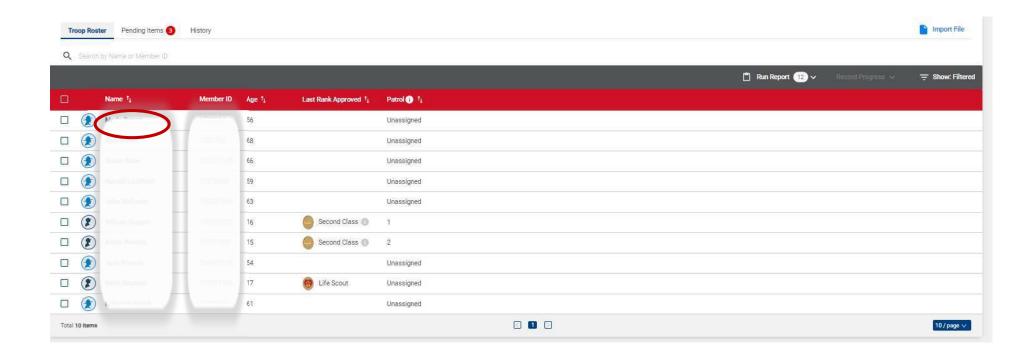


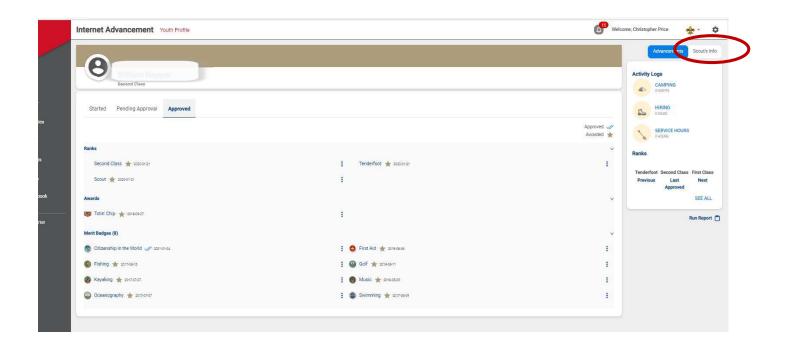


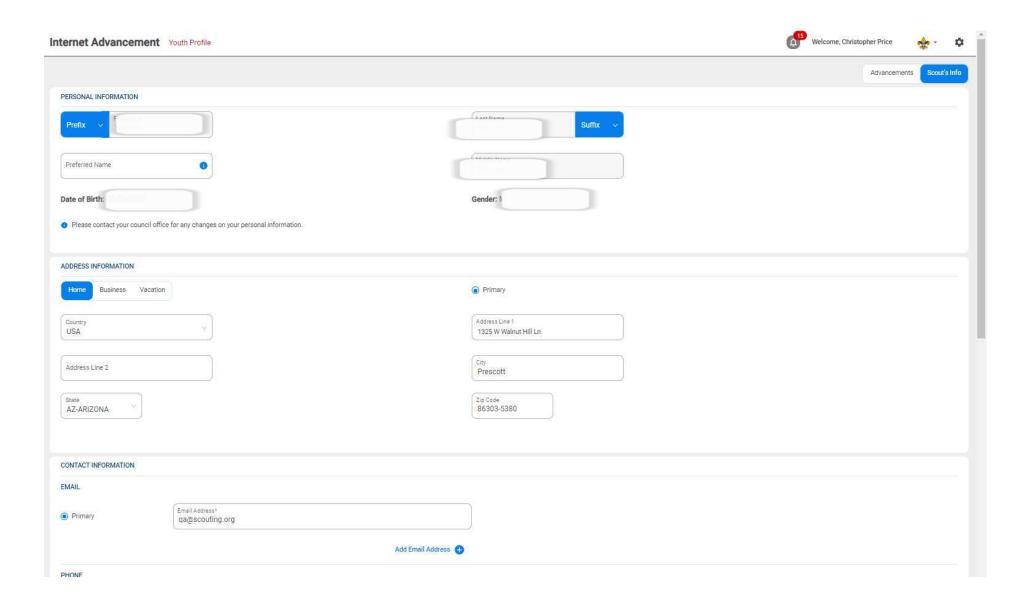
#### **Edit Personal Information**

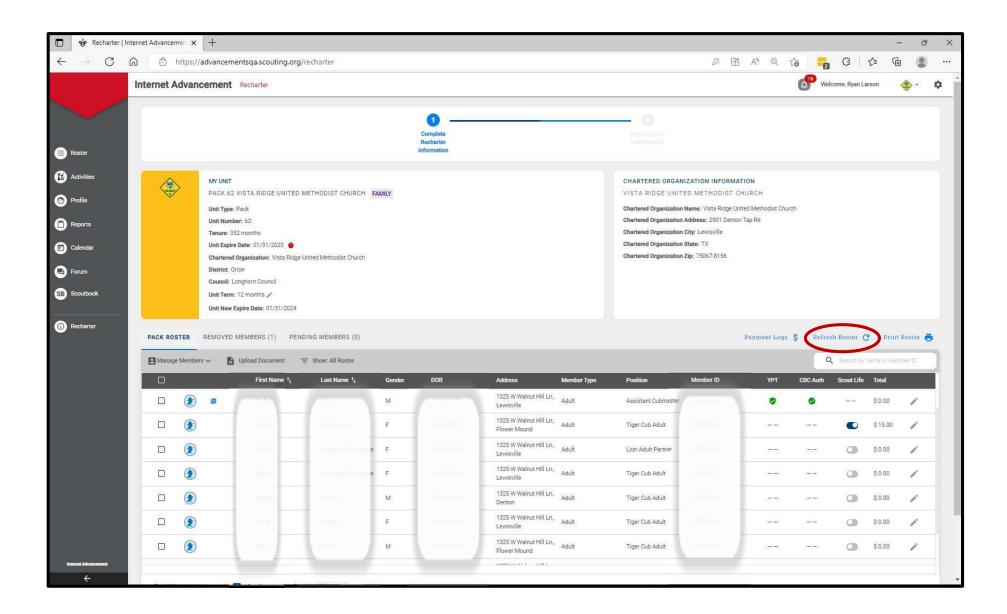
Click Roster. Then the profile of the individual you would like to edit. Edit the information on the profile (for Scouts, click Scouts Info). Then click Recharter and Refresh Roster.







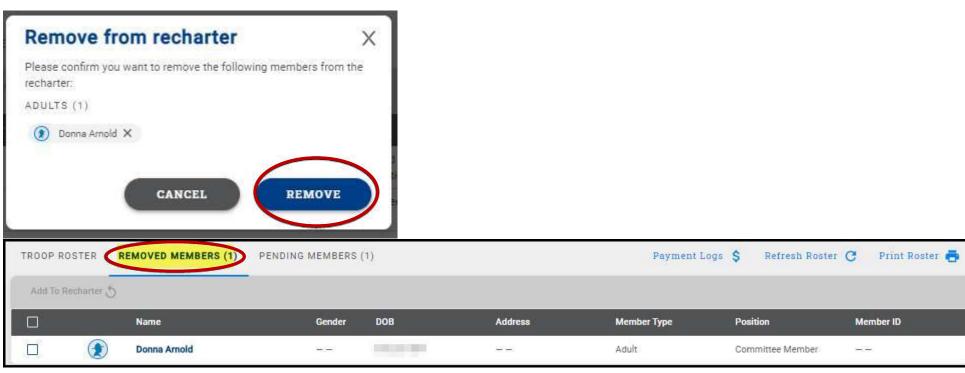




#### **Remove From Recharter**

Select the person whom you are removing. Click on Manage Members and select Remove From Recharter. A popup will appear and you will choose Remove. At that point they will be moved to the Removed Members Tab.

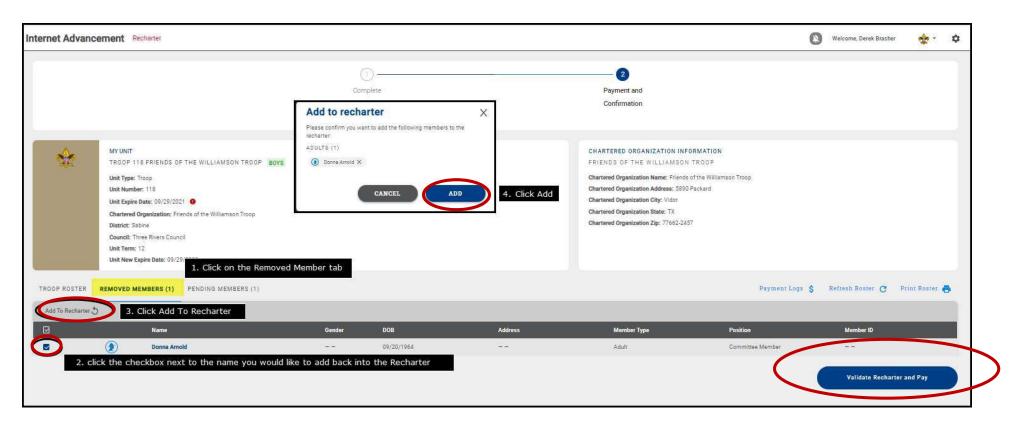




#### Adding An Individual Back Into The Recharter After Removing Them

You have the ability to add someone back into the renewal after removing them by clicking on the Removed Member Tab.

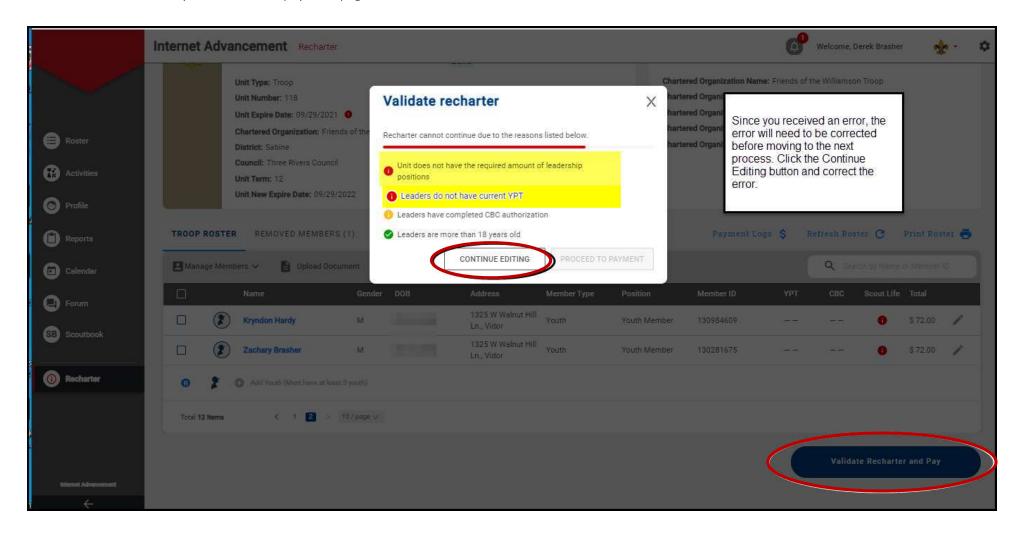
- 1. Click on Remove Member tab
- 2. Check the box next to the person you are adding back into the unit
- 3. Click Add to Recharter.
- 4. A pop up box will appear-click Add

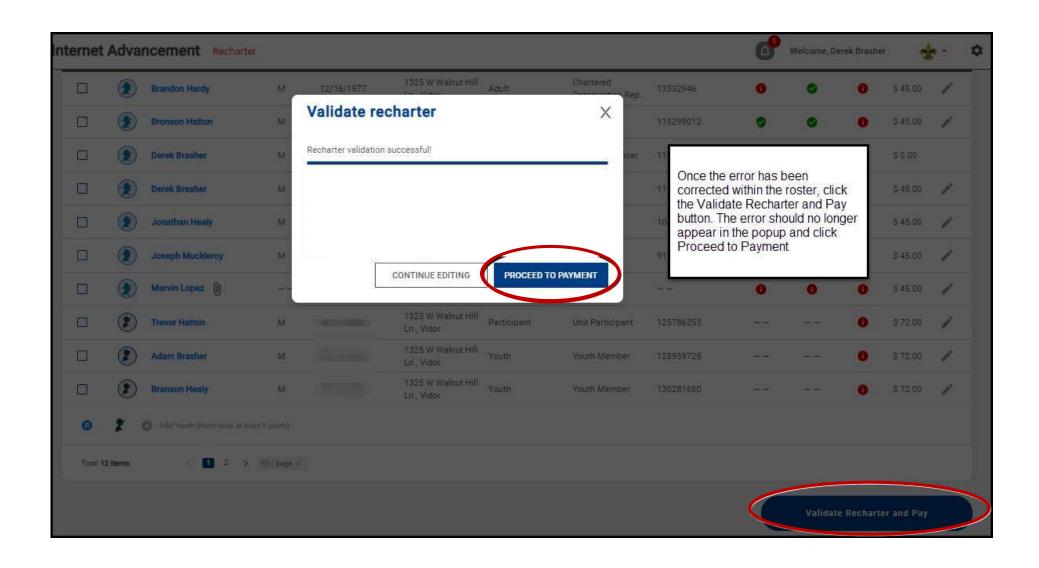


#### **Validate Recharter and Pay**

Once you have updated your roster and attached the necessary documents, click **Refresh Roster** and then the **Validate Recharter and Pay**. A popup will appear that will display any errors or warnings. At that time you will need to review and correct the warnings and errors before you can continue with your renewal. The errors will have a red bubble next to them and the warnings a yellow bubble. If you receive a warning or error, you have the ability to correct and continue through the submittal process.

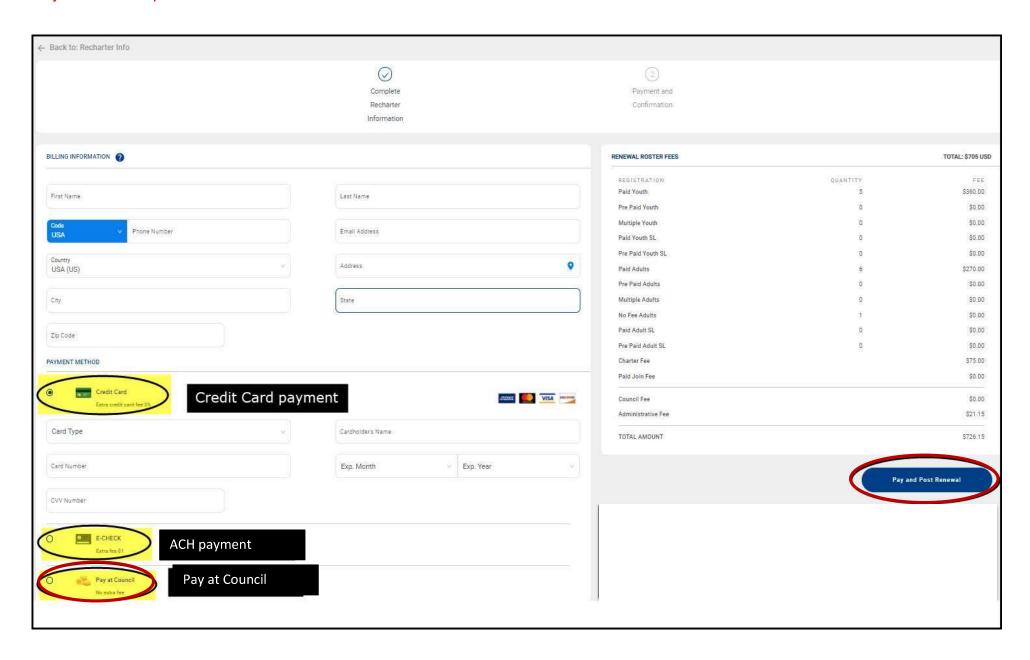
Once the error has been corrected within the roster, click the Validate Recharter and Pay button. If there are no errors and you have addressed the warnings and you are ready to submit your unit, click the Proceed to Payment button. If you have no errors or warnings and you may proceed straight to payment. You have the option to print your roster by clicking the "Print Roster" button above the search for Name or Member ID bar once you have validated all information and before you move to the payment page.





#### **Payment and Confirmation**

During this process you have the ability to verify all fees and choose your payment option. The Council requests the unit selects the Pay at Council Option.

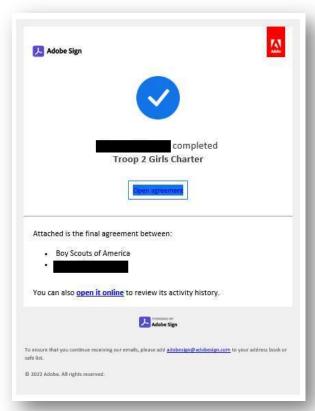


#### **Signature and Approval**

After paying and posting the renewal an Adobe Acrobat Sign document will be sent to your NEW Key 3 (as entered on the recharter), COR Delegate, and Key 3 Delegate. Any of these individuals may sign the document if approval has been discussed with the Charter Organization Representative. It is preferable that it be signed by the Charter Organization Representative. Be sure to save and/or print the recharter renewal prior and after submittal. **Once signed and payment has been completed, your recharter process will be complete for your unit.** 



Example of email sent to Key 3, COR Delegate, and Key 3 Delegate. Remember to save/print agreement



Example of recharter completed email after charter has been electronically signed sent to Key 3 COR Delegate, and Key 3 Delegate.

Remember to save/print agreement

#### **Adult Position Codes:**

Use the following codes to complete an adult leader application. All adult positions may be male or female. The minimum age for these positions is noted in parenthesis beside the position. Positions highlighted in Red only require YPT completion.

#### **UNIT POSITIONS:**

IH: Institutional Head or Executive Officer of Chartering Organization-- This position is not a Registered position and no fee. This person must fill out an adult application to hold any registered position-(21)

CR: Chartered Organization Representative--Registration fee and application is required to register for this Position-(21)

**CC:** Committee Chairperson-(21)

MC: Member of Committee- (Required--Minimum -- two per unit)- (21)

CM: Cubmaster-(21) CA: Assistant Cubmaster-(18)

PT: Pack Trainer-(21)

NM: New Member Coordinator-(21)

LL: Lion Guide- Lion Leader-(21)

TL: Tiger Cub Den Leader-(21)

DL: Den Leader-(21)

DA: Assistant Den Leader-(18)

WL: Webelos Den Leader-(21) WA: Assistant Webelos Den Leader-(18)

LP: Lion Adult Partner-This is not an official registered position. (18)
AP: Tiger Adult Partner-This is not an official registered position. (18)

SM: Scoutmaster-(21) SA: Assistant Scoutmaster-(18)

NL: Venture Crew Advisor-(21)

NA: Venture Crew Associate Advisor-(18)

SK: Sea Scout Ship Skipper-(21) MT: Sea Scout Ship Mate-(21)

92U: Unit College Scouter Reserve-(18)

91U: Unit Scouter Reserve-(21)

92V: Venturing College Scouter Reserve-(21)

#### **NON-UNIT POSITIONS:**

Code 42: Merit Badge Counselor (18) this is a district position requiring district approval by the Advancement Committee. No fee is required. Adult application and the information sheet is required and turned in however is not part of your unit charter. Please turn in this application separate from your unit registrations.

Code 52: Supernova Mentor (21) – Adult application form is required along with the Supernova Awards Mentor Information application.

Code 58: Nova Counselor (21)- Adult application form is required.

LC: Lion Coordinator-(21) -District-Council Position.

#### If a Leader requires Youth Protection Training

- 1) Go to www.Scouting.org
- 2) In the upper right hand sec on click on MyScou ng
- 3) Click Create an Account IF you do not have one set up
- 4) Select a User Name and check availability

**Note:** If you know your member ID number, then select "Samoset Council" and enter member ID and proceed as noted above. If you are a new adult (your adult application has not yet been processed) create an account without an ID number. New adults will enter their ID number later when they receive their membership ID card.

### Remember, your Member ID number links your My Scouting Training records to your record at the Texas Trails Council.

- 5) From options on left, click E-learning
- 6) From the General Tab scroll down to Youth Protection Training to take the course
- 7) When Complete, print the certificate and keep one copy for your reference. Turn in one a copy to your unit leader.



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#### **Contact Information for Assistance**

#### You're not alone!

Each district has volunteers and staff that are standing by ready to assist you in the charter renewal process if needed. You're not alone.

Your Unit should have a volunteer Unit Commissioner who has been assigned to work with your unit throughout the charter renewal process. They can be a great resource. The District Commissioner and District Executive will be able to tell you who the Unit Commissioner is for your unit. If one is not assigned, the District Commissioner or District Executive will be there to help. Their contact information is provided:

Buffalo Mountain
District

District Commissioner
Howard Taylor
325-669-3871
howard.tayloriii@gmail.com

Old Commanche
Trails District
District Commissioner

Pecan Valley
District
District Commissioner

#### **National Registration Fees**

Adults: \$45 Youth: \$75 Scouts' Life Subscription: \$15

In addi on to the membership fees for each person, there is a single Unit Liability Insurance Fee of \$100 per unit.

Our Council Registrar, Cindy Webb is also available for assistance. Cindy can be reached at 325-677-2688

or by email at cindy.webb@scouting.org