Internet Rechartering 2.0 User Guide

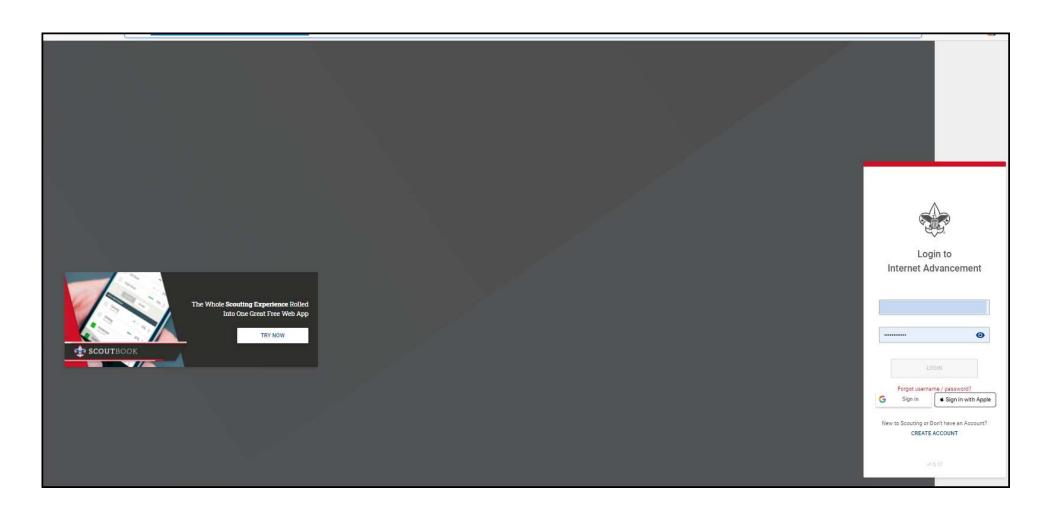
updated 9/12/2022



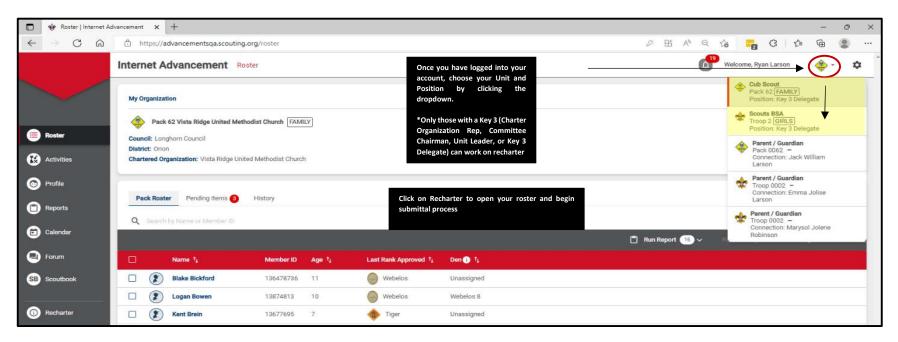
Internet Rechartering may be accessed by the Unit Leader, Charter Org Rep, Committee Chairman or Key 3 Delegate by logging into their Scoutbook.com or my.Scouting Account or directly at

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 https://www.scouting.org/resources/internet-rechartering/

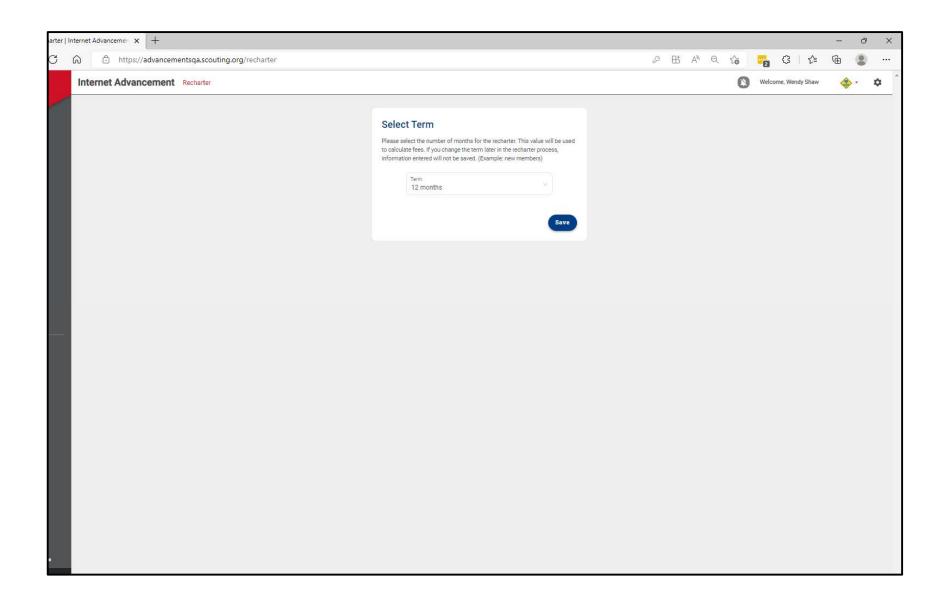


Open Recharter



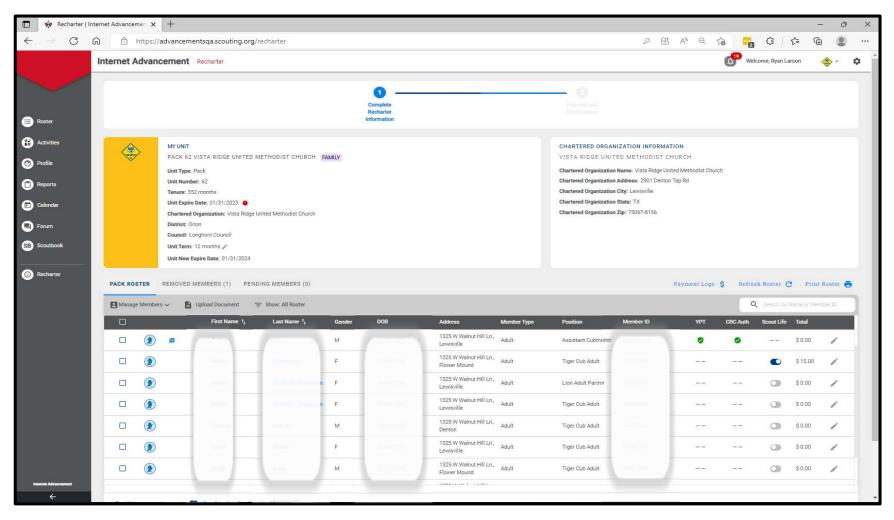
Select your recharter term.

DO NOT SELECT ANOTHER TERM. Our Council registers units for 12 months.



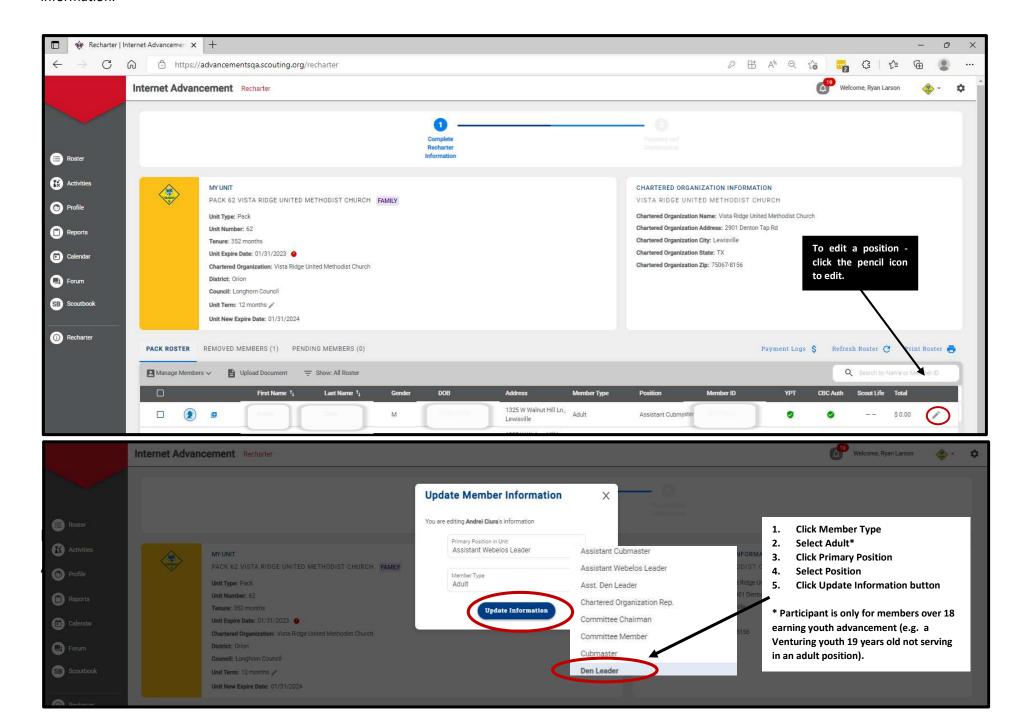
Once the roster is loaded, you may start editing the roster

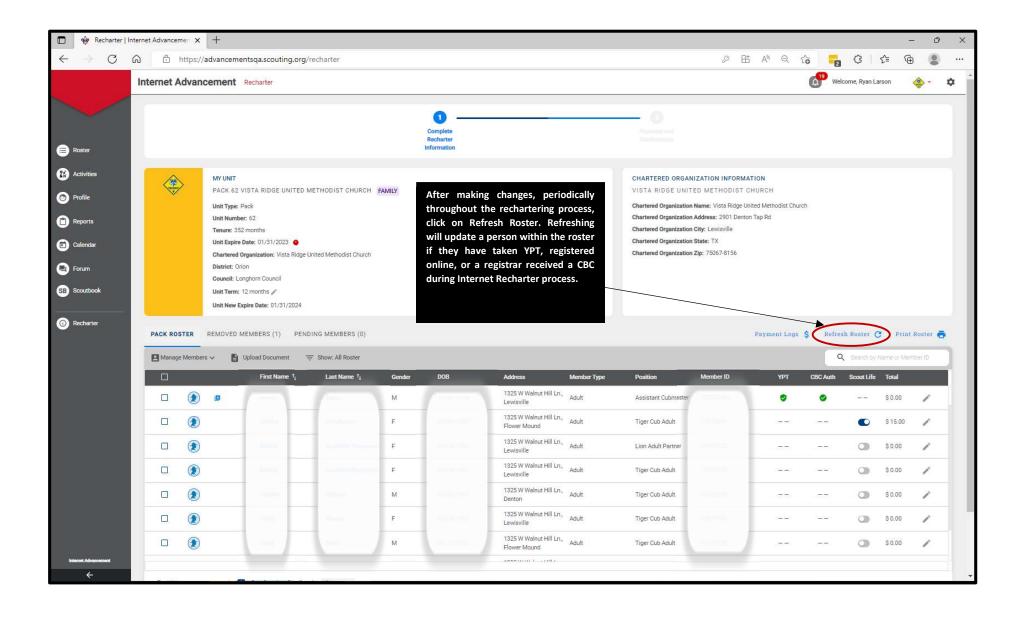
- YPT Red Exclamation Point Youth Protection Training has not been completed and recorded in the person profile or the YPT has expired
- YPT Green Checkmark Youth Protection Training is current
- CBC Auth Green Checkmark New Criminal Background Disclosure has been received and recorded in the person 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.

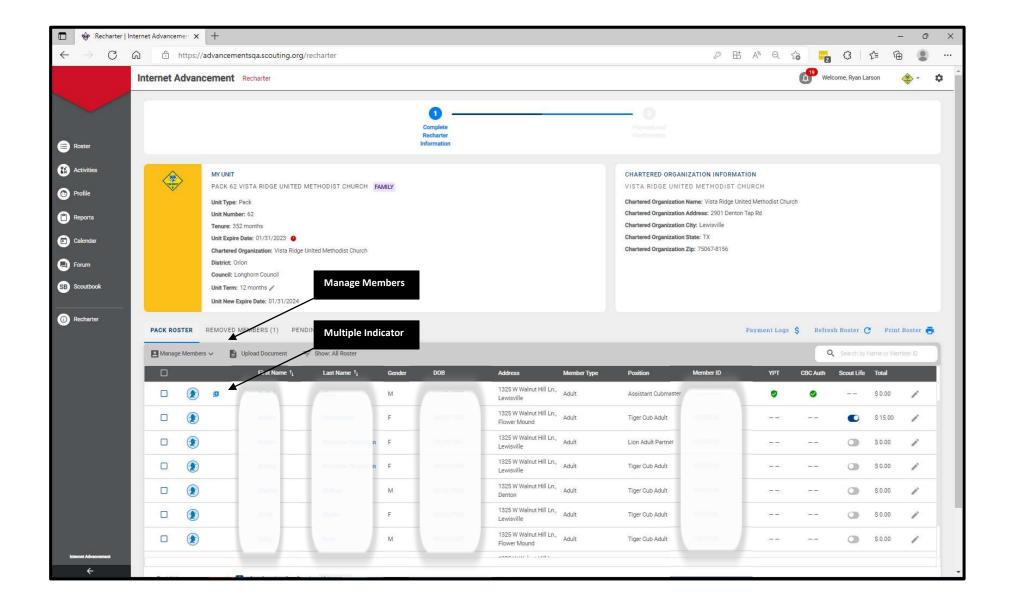




Adding an Existing Member of Another Unit

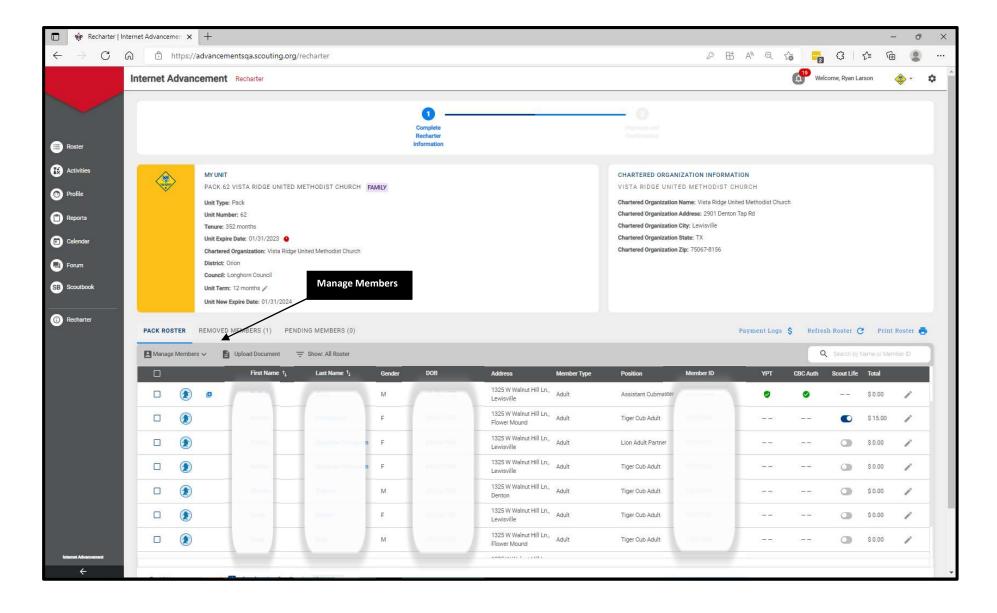
Click on Manage Members>Add New Member>Click Existing Member>Enter all required information>Click the Add Member button. The member will show a "+" by their name to indicate they are paying their registration fees in another unit. If they are paying their registration fees in your unit, click the checkbox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

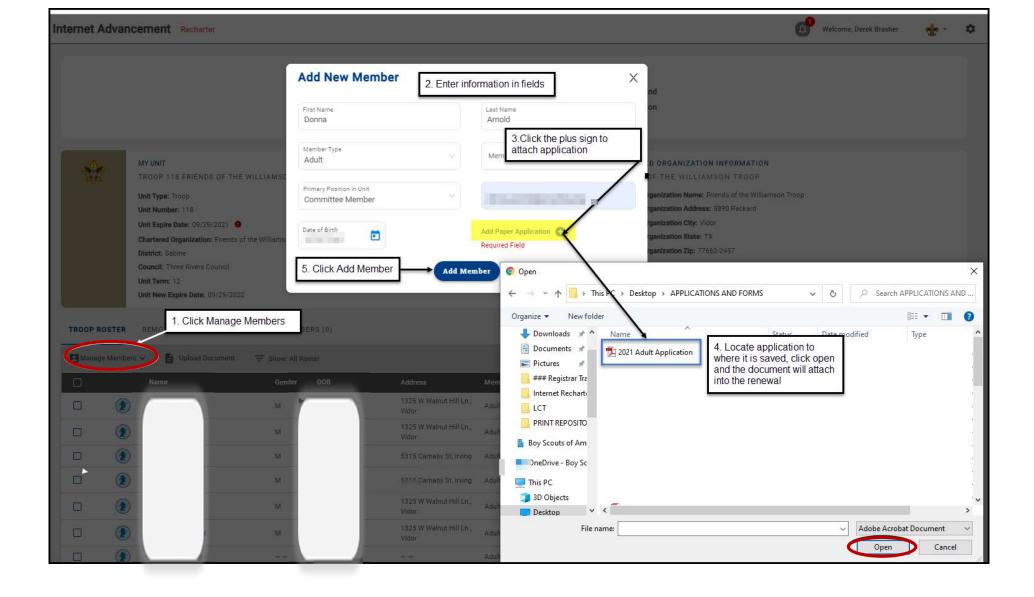
If they are an adult, be sure to add a signed adult application for the new adult member from another unit by clicking the checkbox by their name>Upload Document>Select a file of the application>Click Save.



Adding a New Member

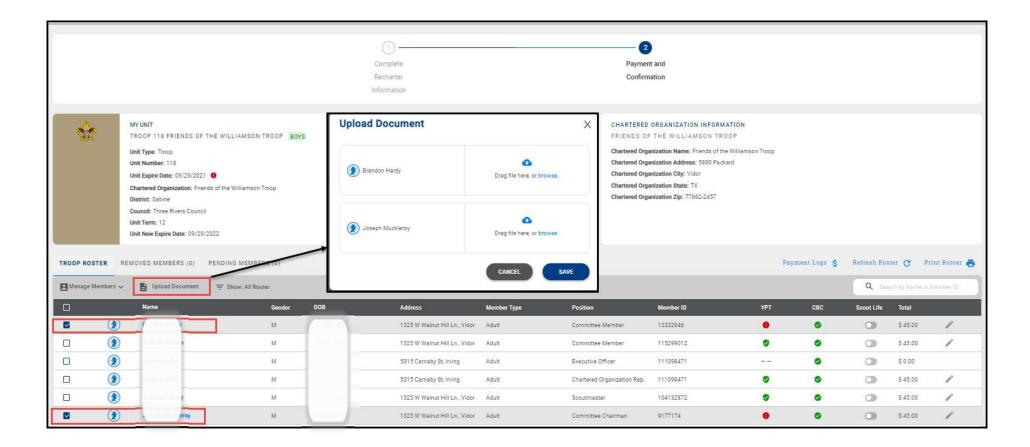
Click on Manage Members>Add New Member>Enter all required information>Click on the "+" sign next to Add Paper Application>Select the file and attach the application >Click the Add Member button.





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.

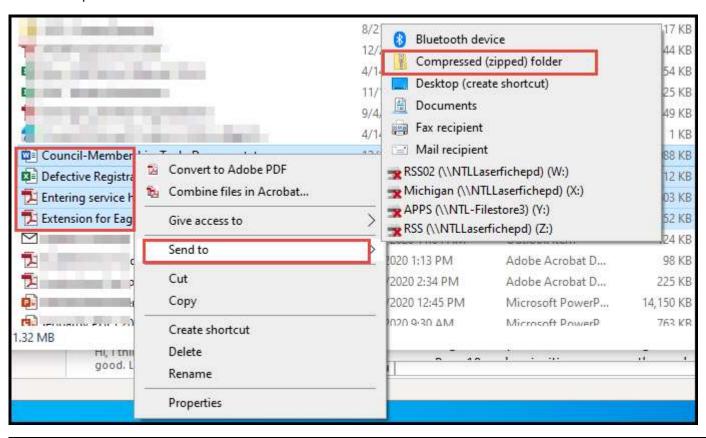


Promoting a Member

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.

Creating a Zip File for loading documents

If you are uploading a group of files, use your Zip File option by highlighting the documents, right click after highlighting the documents and select Send to and next slect Compressed (zipped) folder. Once you have created the zip file and named your zip folder, choose the folder when clicking the Upload Document option.



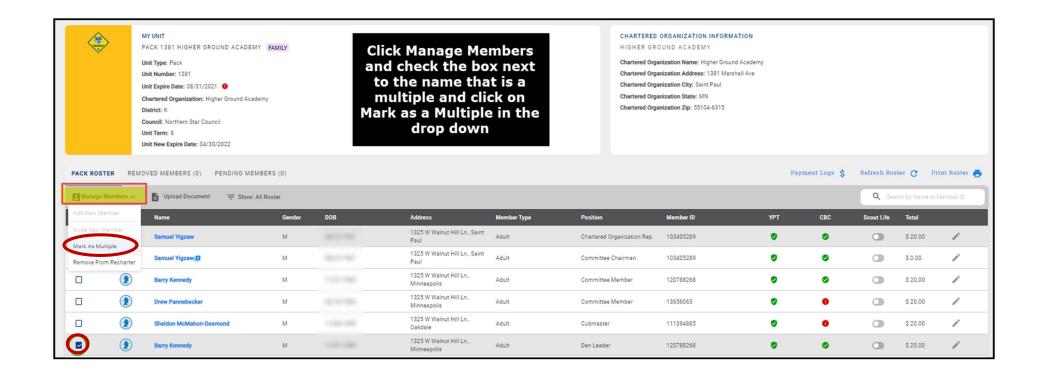
Name	Status	Date modified	Туре	Size
RENEWAL DOCUMENTS	2	9/9/2021 8:51 AM	Compressed (zipp	1,289 KB
11.2021 Registrar Training		8/12/2021 2:48 PM	Microsoft PowerP	1,001 KB

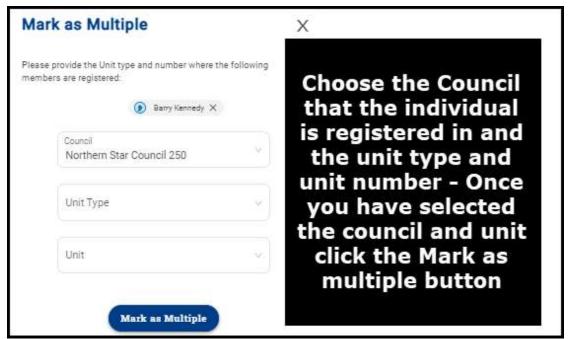
Adding a Multiple

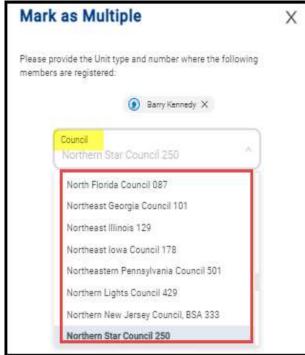
If an individual is paying in another unit, you have the ability to register them in your unit(s) as a Multiple and no fee is collected. The unit listed as the Primary unit is the unit they will be paying their recharter fees. If an individual is paying in a Council or District level position, you have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

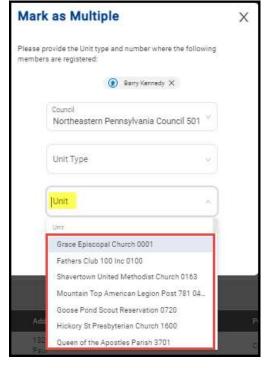
Note 1: For those multipling from a Council position select "Non-unit Position".

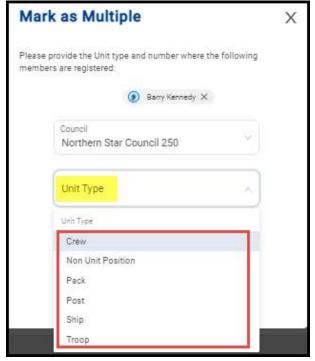
Note 2: The Charter Org Representative is the only individual that can Multiple in more than one position as either a Committee Chair or Committee Member only. No other adult leaders can multiple in more than one position within the same unit.



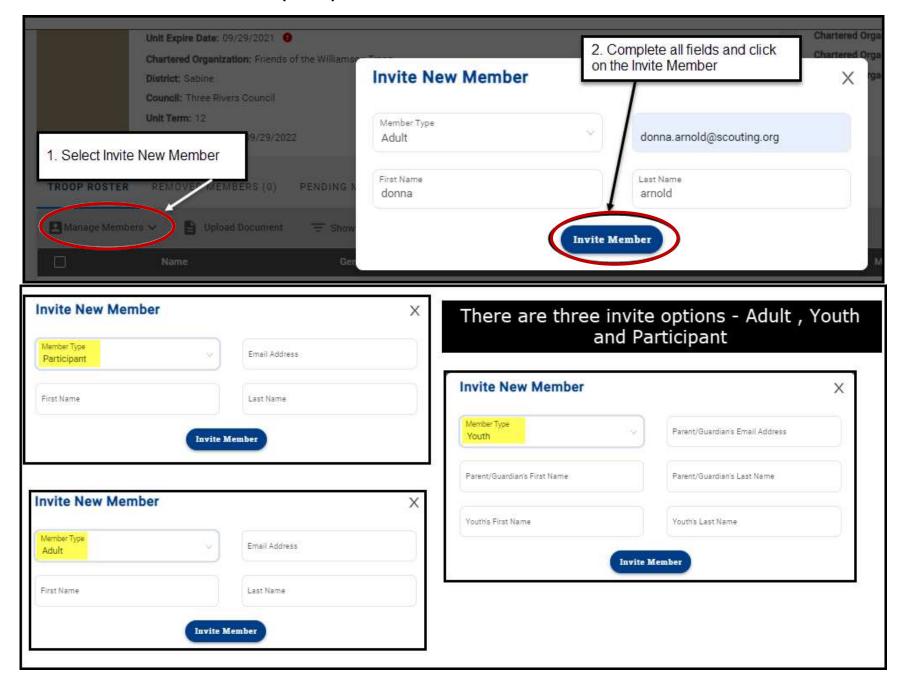




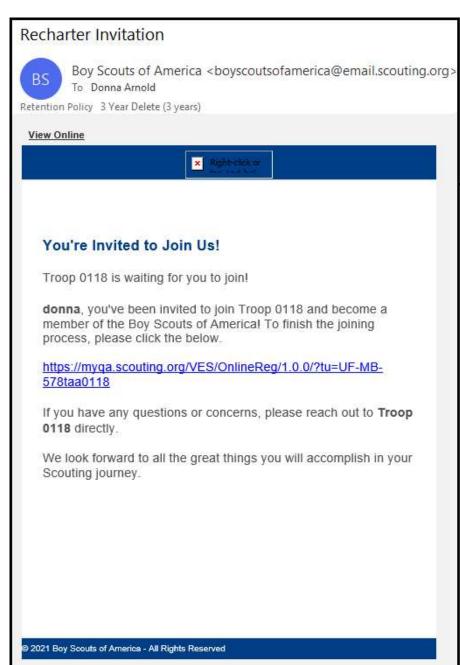




Invite New Member into the unit (Leads)



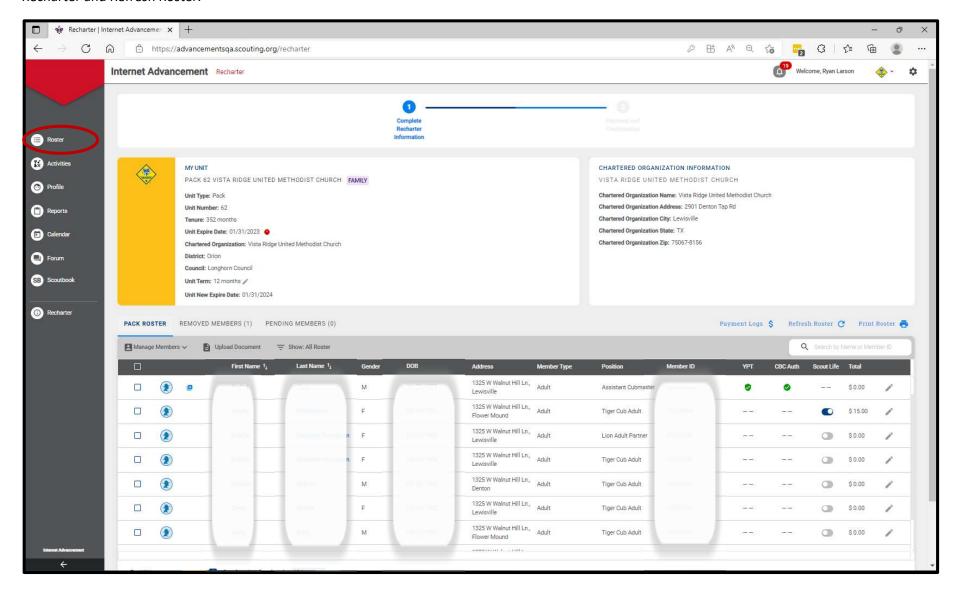
An email is sent with a link to complete an online registration. Reminder: click on Refresh Roster periodically throughout processing your renewal. This will add any new online registrations into your unit. Once the invite is sent, they will appear on the Pending Members Tab.

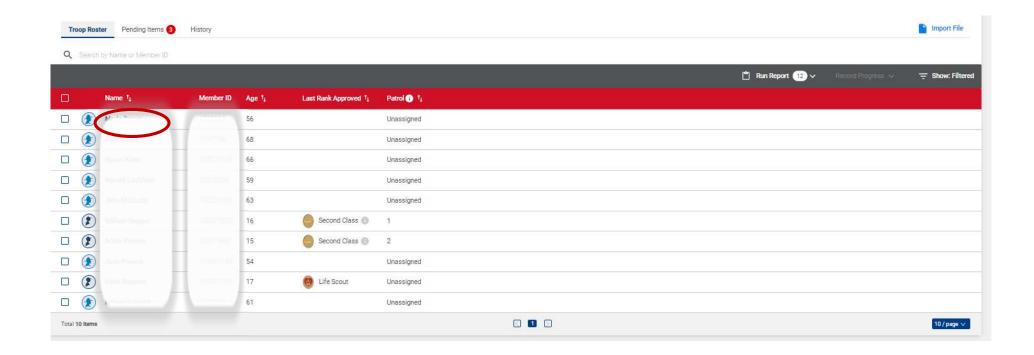


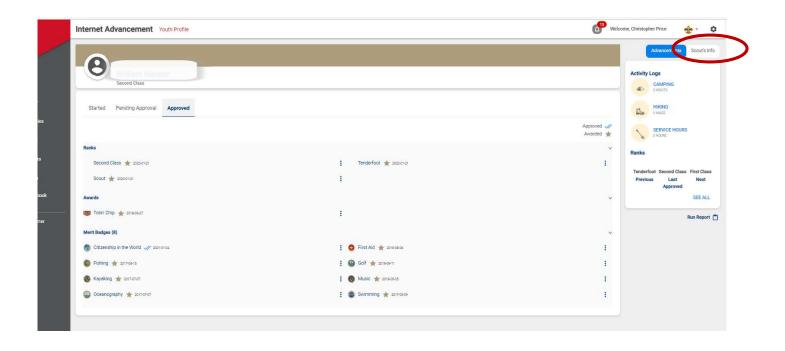


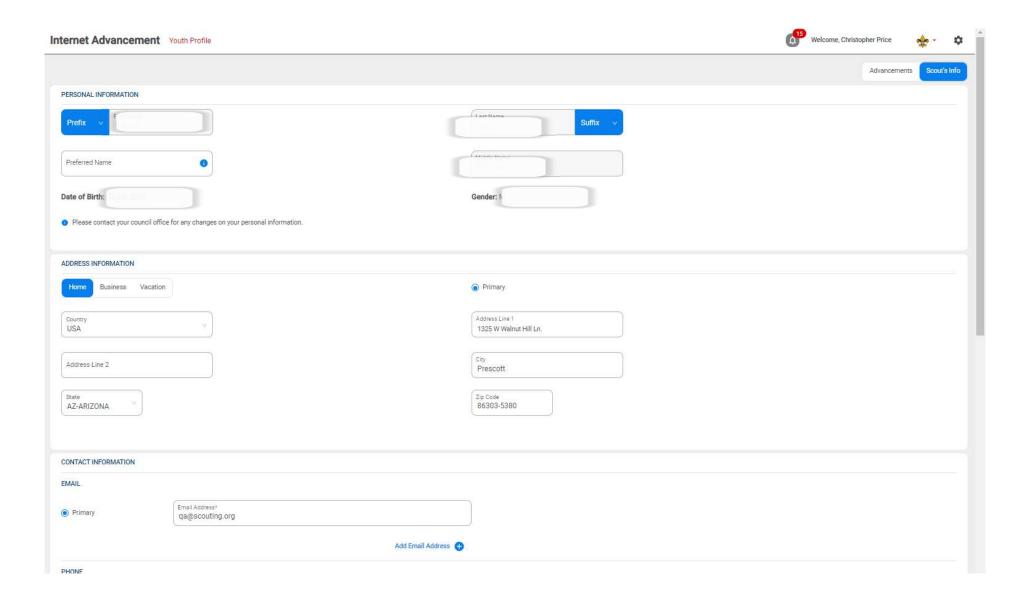
Edit Personal Information

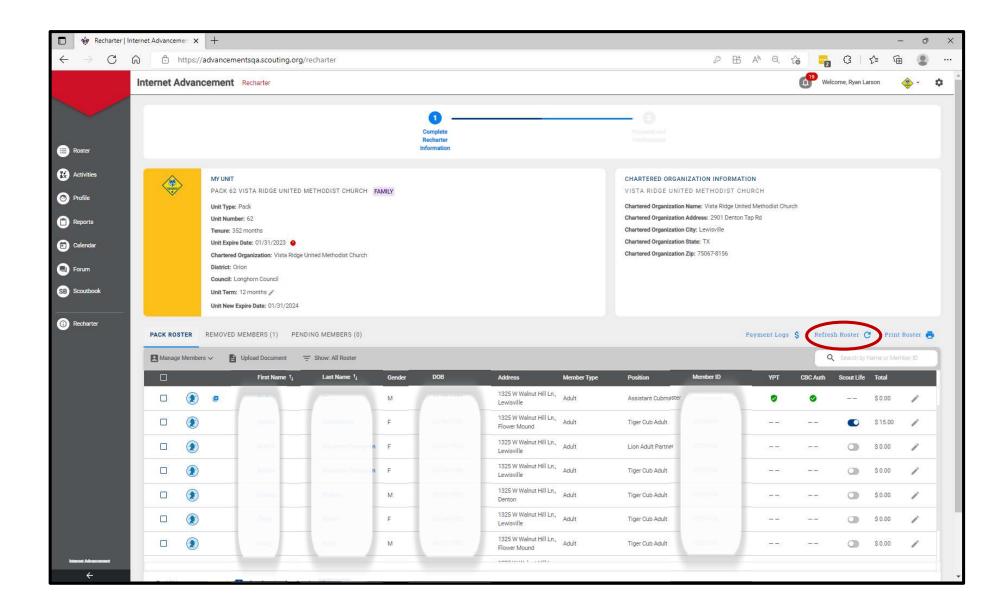
Click Roster, then select the profile of the individual you would like to edit. Edit the information on the profile (for Scouts, click Scouts Info). Then click Recharter and Refresh Roster.







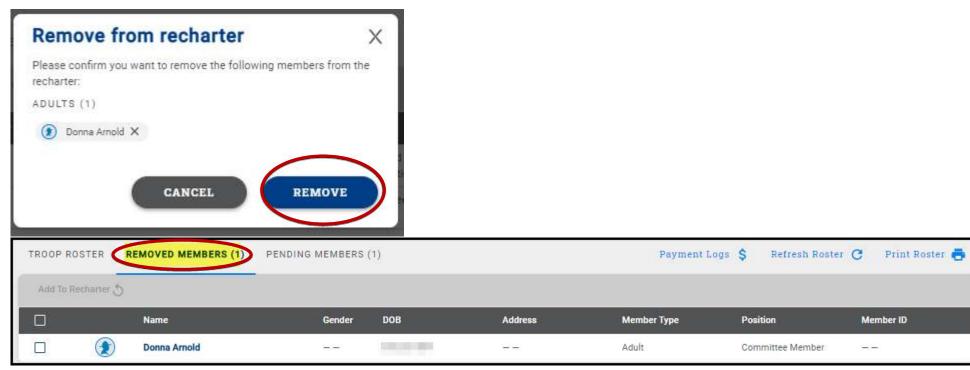




Remove From Recharter

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.

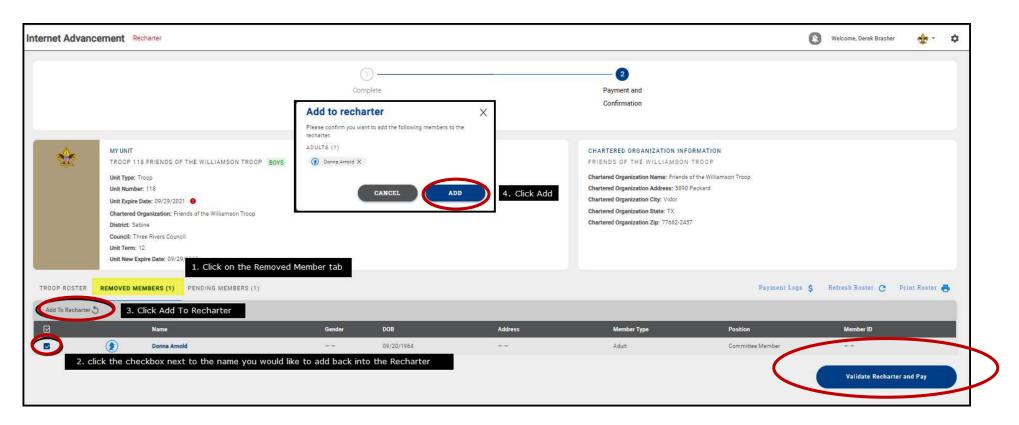




Adding An Individual Back Into The Recharter After Removing Them

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

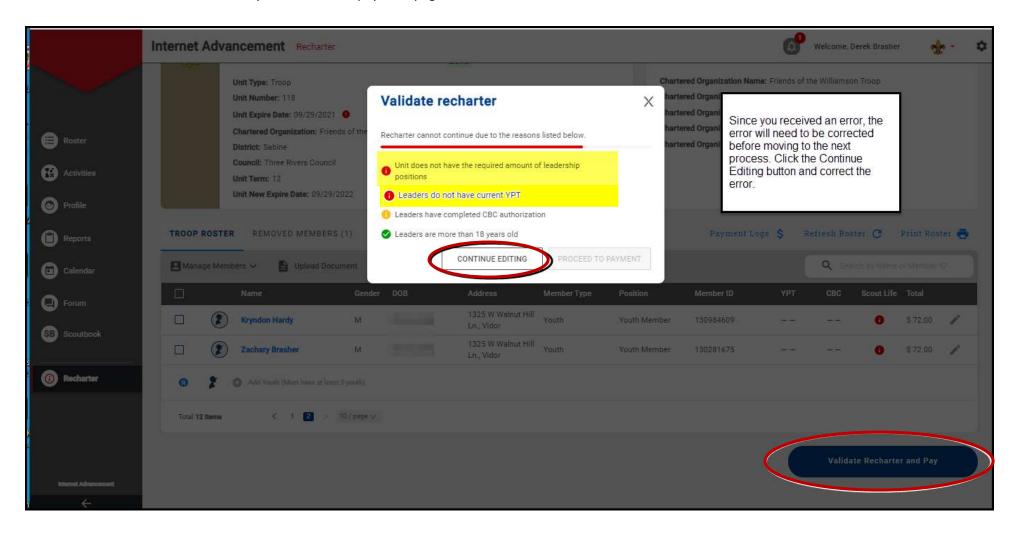
- 1. Click on Remove Member tab.
- 2. Check the box next to the person you are adding back into the unit.
- 3. Click Add to Recharter.
- 4. A pop up box will appear-click Add.

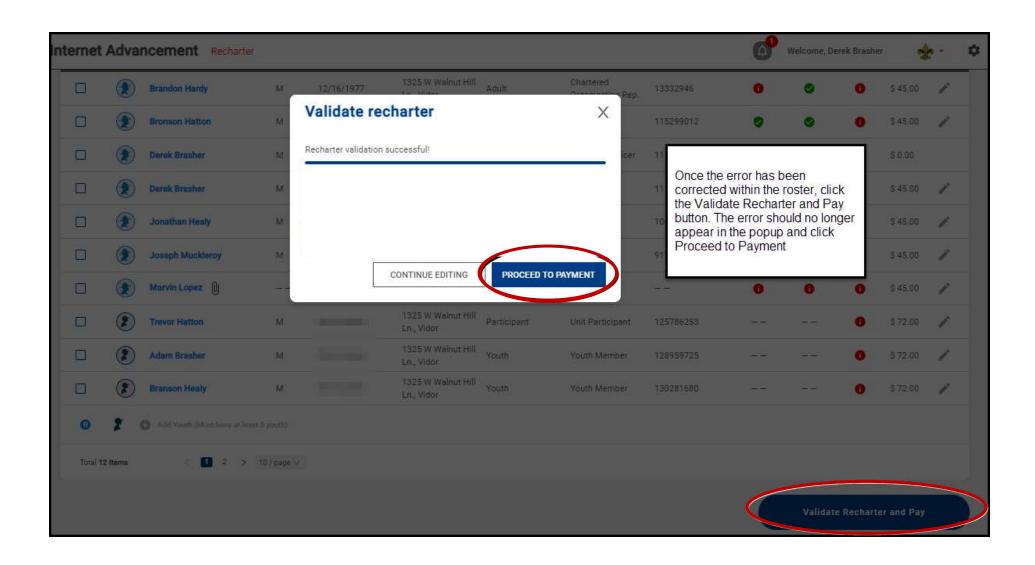


Validate Recharter and Pay

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.

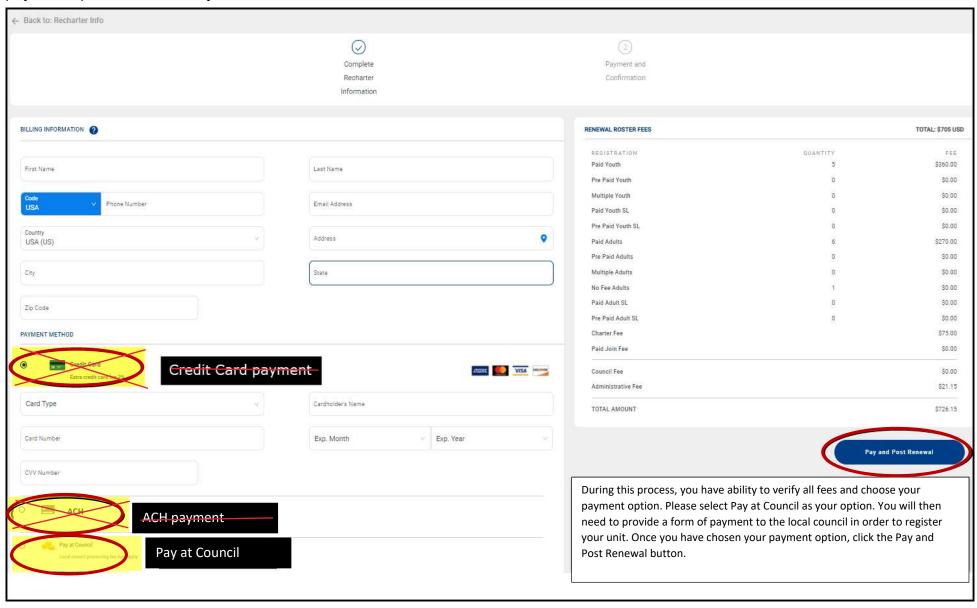
Once the error has been corrected within the roster, click the **Validate Recharter and Pay button**. If there are no errors and you have addressed the warnings and you are ready to submit your unit, click the **Proceed to Payment** button. If you have no errors or warnings and you may proceed straight to payment. Please print your unit roster at this time 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. DO NOT SELECT Credit Card payment or ACH payment. You will select Pay at Council and will need to provide a form of payment to the local council in order to register your unit. You can pay with Cash, Check, or if necessary, by calling in payment. Once you have chosen your payment option, click the Pay and Post Renewal button.

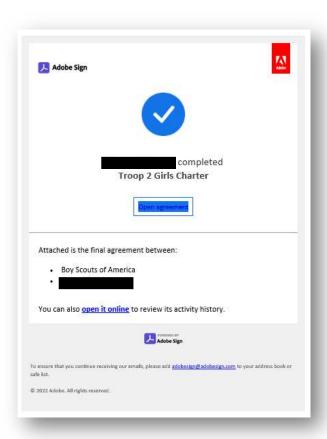


Signature and Approval

After paying and posting the renewal, an Adobe Acrobat Sign document email 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