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 <u>https://www.scouting.org/resources/internet-rechartering/</u>



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)

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Internet Advan	Recharter								(AP Weld	come, Ryan La	rson	٩
				Complete Recharter Information		O Parameter						
*	MY UNIT PACK 62 VISTA RIDGE UNITED Unit Type: Pack Unit Number: 62 Tenure: 352 months Unit Expire Date: 01/31/2023 Chartered Organization: Vista Ridg District: Onion Council: Longhorn Council Unit Term: 12 months y [*] Unit New Expire Date: 01/31/2024	ge United Methodist Church	FAMILY			VISTA RIDGE UNI	n State: TX	IURCH ted Methodist Chur	ch			
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	Charles	Cheloweth (м	0.251742	1325 W Walnut Hill Ln., Adult	Tiger Cub Adult	14052934				\$ 0.00	
	2 may	Seeler,	F	02,041193	1325 W Walnut Hill Ln., Lewisville Adult	Tiger Cub Adult	088036				\$ 0.00	
	Could	Beats	М		1325 W Walnut Hill Ln., Flower Mound Adult	Tiger Cub Adult	1507208				\$ 0.00	
		-		~								

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.



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Internet Ad	vancement	Recharter								(19) Welco	ome, Ryan La	rson
					Complete Recharter Information							
(Unit Type: Unit Numi Tenure: 3 Unit Expir	: Pack ber: 62 52 months e Date: 01/31/2023 () I Organization: Vista Ridge	METHODIST CHURCH F	FAMILY	throughout th click on Refr will update a if they have	g changes, periodically ne rechartering process, resh Roster. Refreshing person within the roster taken YPT, registered registrar received a CBC	CHARTERED ORGAN VISTA RIDGE UNIT Chartered Organization Chartered Organization Chartered Organization Chartered Organization	ED METHODIST CH Name: Vista Ridge Unit Address: 2901 Denton City: Lewisville State: TX	IURCH ed Methodist Chur	ch		
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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.

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Profile		PACK 6	2 VISTA RIDGE UNITED	METHODIST CHURCH	FAMILY				VISTA RIDGE UNIT			h			
Peports		Unit Nun							Chartered Organization Chartered Organization	Address: 2901 Denton					
Calendar		Unit Exp	ire Date: 01/31/2023 🧕						Chartered Organization	State: TX					
Forum		District:		United Methodist Church		_			Chartered Organization	Ζιρ: 75067-8156					
SB Scoutbook			Longhorn Council n: 12 months 🖌	Manage M	embers										
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Recharter	PACK ROST	ER REMOVE	MEMBERS (1) PEN	DING MEMBERS (0)							Payment Logs	\$ Refres	Roster C	Print F	loster 👼
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		۲			м		1325 W Walnut Hill Ln., Lewisville	Adult	Assistant Cubmaster		•	0		\$ 0.00	1
		۲	Angelica	Christerson	F	\$4/04/1992	1325 W Walnut Hill Ln., Flower Mound	Adult	Tiger Cub Adult	13373474				\$ 15.00	1
		۲	Pobbie	Saudette Tropper	n F	04/04/MDB	1325 W Walnut Hill Ln., Lewisville	Adult	Lion Adult Partner	12395300				\$ 0.00	1
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		۲	Charles	Ordigen	м	0.21/103	1325 W Walnut Hill Ln., Denton	Adult	Tiger Cub Adult	14030534		.==		\$ 0.00	1
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		۲	Craity	2mm	м	19/23/142	1325 W Walnut Hill Ln., Flower Mound	Adult	Tiger Cub Adult	12477020				\$ 0.00	1
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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.

		 8/2 12/2 4/1 Desktop (create shortcut) 9/4 Fax recipient Mail recipient 	17 KB 44 KB 54 KB 25 KB 49 KB 1 KB
Council-Member	Convert to Adobe PDF Combine files in Acrobat Give access to	Mail recipient RSS02 (\\NTLLaserfichepd) (W:) Michigan (\\NTLLaserfichepd) (X:) APPS (\\NTL-Filestore3) (Y:) RSS (\\NTLLaserfichepd) (Z:)	88 KB 12 KB 03 KB 52 KB 24 KB
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Name	Status	Date modified	Туре	Size
RENEWAL DOCUMENTS	ß	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.

	MY UNIT PACK 1381 HIGHER GROUND ACADEMY F Unit Type: Pack Unit Number: 1381 Unit Expire Date: 08/31/2021 C Chartered Organization: Higher Ground Academy District: K Council: Northern Star Council Unit Term: 8 Unit New Expire Date: 04/30/2022	AMILY	and o to t mul	Manage Me check the bo he name tha tiple and clic as a Multiple drop down	x next t is a ck on e in the		HIGHER GRO Chartered Orga Chartered Orga Chartered Orga Chartered Orga	ORGANIZATION INFORMATION SUND ACADEMY inization Name: Higher Ground Academ inization Address: 1381 Marshall Ave inization City: Saint Paul inization State: MN inization Zip: 55104-6315					
	MOVED MEMBERS (0) PENDING MEMBER								Payn	nent Logs 💲	Refresh Ros		int Roster 📇
Add New Member	🕒 Upload Document 🛛 \Xi Show: All Ros	ster									Q Sea	rch by Name or	Vember ID
	Name	Gender	DOB	Address	Member Type	Position		Member ID	үрт	CBC	Scout Life	Total	
Invite New Member	Samuel Yigzaw	м		1325 W Walnut Hill Ln., Saint Paul	Adult	Chartered Or	rganization Rep.	103405289	0	0		\$ 20.00	1
Remove From Recharter	Samuel Yigzaw	М		1325 W Walnut Hill Ln., Saint Paul	Adult	Committee 0	Chairman	103405289	•	•		\$ 0.00	1
	Barry Kennedy	М		1325 W Walnut Hill Ln., Minneapolis	Adult	Committee M	Vember	120788268	0	•		\$ 20.00	1
	Drew Pannebecker	М		1325 W Walnut Hill Ln., Minneapolis	Adult	Committee M	Member	13656063	0	0		\$ 20.00	1
	Sheldon McMahon-Desmond	M		1325 W Walnut Hill Ln., Oakdale	Adult	Cubmaster		111394885	0	0		\$ 20.00	1
۲	Barry Kennedy	М		1325 W Walnut Hill Ln., Minneapolis	Adult	Den Leader		120788268	0	0		\$ 20.00	1



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.

Recharter Invitation	TROOP ROS	STER	REMOVED MEMB	ERS (1)	NG MEMBERS (1)	
Boy Scouts of America < boyscoutsofamerica@email.scouting.org>	Send Re	minder				
To Donna Arnold Retention Policy 3 Year Delete (3 years)			Name	Gender	Member Type	Invited on
View Online		۲	donna arnold		Adult	2021-09-07
x Right-click or	Total 1 Item	9	< 🖸 > 1	0 / page 🗸		
You're Invited to Join Us!						
Troop 0118 is waiting for you to join!						
donna, you've been invited to join Troop 0118 and become a member of the Boy Scouts of Americal To finish the joining process, please click the below.						
https://myqa.scouting.org/VES/OnlineReg/1.0.0/?tu=UF-MB- 578taa0118						
If you have any questions or concerns, please reach out to Troop 0118 directly.						
We look forward to all the great things you will accomplish in your Scouting journey.						
© 2021 Boy Scouts of America - All Rights Reserved						

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.



Troop Ro	ster Pending Items 3	History						Import File
Q Searc	h by Name or Member ID							
						📋 Run Report 12 🗸	Record Progress 🐱	┯ Show: Filtered
	Name †	Member ID	Age † Last Rank Approved †	Patrol 👔 †				
	Martin		56	Unassigned				
•	Rick shown	1727 [35]	68	Unassigned				
0 🛞	Susan Kano:	103737185	66	Unassigned				
	Ronald Ltchfield	12218539	59	Unassigned				
•	John McGurdy	120221655	63	Unassigned				
	William Napper	128573023	16 Second Class ()	1				
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	Jude Powers	134331166	54	Unassigned				
•	Nash Routson	135071195	17 🔞 Life Scout	Unassigned				
•	Kohorf Schmidt		61	Unassigned				
Total 10 Item					= 1			107 page ∨

~			Advancements Scout's Info
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Scout ★ 2020-1-21	I		erfoot Second Class First Class vious Last Next Approved
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6 Fishing * 2017-08-15	🕻 🚇 Golf 🌟 2019-09-11	1	
🚳 Kayaking 🌟 2017-07-07	i 📵 Music 🤺 zoneosas	1	
Oceanography 🌟 2017-07-07	🛔 🌑 Swimming 🌟 2017-05-09	1	

Internet Advancement Youth Profile

Internet Advancement	Youth Profile		Welcome, Christopher Price 🏤 - 🌣
			Advancements Scout's Info
PERSONAL INFORMATION			
Prefix v		Last Nama Suffix v	
Preferred Name	0	(
Date of Birth:		Gender: N	
Please contact your council offic	e for any changes on your personal information.		
ADDRESS INFORMATION			
Home Business Vacation		Primary	
Country USA	×	Address Line 1 1325 W Walnut Hill Ln.	
Address Line 2		City Prescott	
State AZ-ARIZONA		Zip Code 86303-5380	
CONTACT INFORMATION			
EMAIL			
Primary	Email Address* qa@scouting.org		
	Add Email Address	•	

PHONE

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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.

9 Man	age Members 🛧	Upload Docu	ment	Show: All Ros	ter					Q Sea	arch by Name (or Member I	D
Add Nev	w Member		Gender	DOB	Address	Member Type	Position	Member ID	үрт	CBC	Scout Life	Total	
		on Hardy	м	1.1.2	1325 W Walnut Hill Ln., Vidor	Adult	Chartered Organization Rep.	13332946	0	۲	0	\$ 45.00	1
	From Recharter	n Hatton	м		1325 W Walnut Hill Ln., Vidor	Adult	Committee Member	115299012	9	0	0	\$ 45.00	1
	Derek	Brasher	М	8-1-10-1	5315 Carnaby St, Irving	Adult	Executive Officer	111098471		٢	0	\$ 0.00	
	Derek	Brasher	м		5315 Carnaby St, Irving	Adult	Chartered Organization Rep.	111098471	0	0	0	\$ 45.00	1
	Donna	Arnold ()				Adult	Committee Member		0	0	0	\$ 45.00	1



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.

ernet Advan	cement Recharter						Welcome, Derek Brashe	• 🔶 • 4
		Add to rech	1)	X. to the	Payment and Confirmation			
*	MY UNIT TROOP 118 FRIENDS OF THE WILLIAMSON TROOP BOYS Unit Type: Troop Unit Type: Troop Unit Expire Date: 09/29/2021 • Chartered Organization: Friends of the Williamson Troop District: Sabine Council: Three Rivers Council Unit Term: 12 Unit New Expire Date: 09/29/ 1. Click on the Removed	recharter: ADULTS (1) O Donne Arrold X		ADD 4. Click Add	CHARTERED ORGANIZATION INFO FRIENDS OF THE WILLIAMSON T Chartered Organization Name: Friends o Chartered Organization City: Vidor Chartered Organization State: TX Chartered Organization Zip: 77662-2457	FROOP f the Williamson Troop ackard		
ROOP ROSTER	REMOVED MEMBERS (1) PENDING MEMBERS (1)					Payment Logs	\$ Refresh Roster C	Print Roster 🐣
Add To Recharter	3. Click Add To Recharter	Gender	DOB	Address	Member Type	Position	Member ID	
2. c	Donna Amold lick the checkbox next to the name you would lik	e to add back in	09/20/1964 to the Recharter		Adult	Committee Member	Validate Rechar	ter and Pay

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.



Interne	t Advar	ncement Recharter							ď	Welcome, Dere	k Brashe		e - 0
	۲	Brandon Hardy	м	12/16/1977	1325 W Walnut Hill	Adult	Chartered Oversite Rep.	13332946	0	0	0	\$ 45,00	1
	۲	Bronson Hatton	м	Validate re	echarter		×	115299012	•	•	0	\$ 45.00	1
Ē	۲	Derek Brasher	м	Recharter validatio	n successful!		icer	-11				\$ 0.00	
	۲	Derek Brasher	м						within the	roster, click		\$ 45.00	1
	۲	Jonathan Healy	м					button. The appear in	e error sho	ter and Pay ould no long and click	er	\$ 45.00	1
	۲	Joseph Muckleroy	м	Γ				Proceed t	o Paymen	t		\$ 45.00	1
	۲	Marvin Lopez		_	CONTINUE EDITING	PROCEED TO	PAYMENT		0	0	0	\$ 45.00	1
	۲	Trevor Hatton	м		1325 W Walnut Hill En., Vidor	Participant	Unit Participant	125786253			0	\$ 72.00	1
	۲	Adam Brasher	М		1325 W Walnut Hill Ln., Vidor	Youth	Youth Member	128959725			0	\$ 72.00	1
	۲	Branson Healy	м		1325 W Walnut Hill Ln., Vidor	Youth	Youth Member	130281680	22	242	0	\$ 72.00	1
Ø	2												
Total	12 Items	< 🖬 2 5 j	0/page V										
										Validate I	lecharte	r and Pay	

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.

← Back to: Recharter Info							
	Complete Recharter Information	Î			2 Payment and Confirmation		
BILLING INFORMATION (2)					RENEWAL ROSTER FEES		TOTAL: \$705 USD
First Name	Last Name				REGISTRATION Paid Youth Pre Paid Youth	QUANTITY 5 0	FEE \$360.00 \$0.00
Code V Phone Number	Email Address				Multiple Youth Paid Youth SL	0	\$0.00 \$0.00
Country USA (US)	Address			•	Pre Paid Youth SL Paid Adults Pre Paid Adults	0 6 0	\$0.00 \$270.00 \$0.00
City	State				Multiple Adults No Fee Adults Paid Adult SL	0 1 0	\$0.00 \$0.00 \$0.00
Zip Code PAYMENT METHOD					Pre Paid Adult SL Charter Fee	0	\$0.00 \$75.00
Credit Car	ard payment		172002 - 🧶	VISA MICHAE	Paid Join Fee Council Fee Administrative Fee		\$0.00 \$0.00 \$21.15
Card Type	✓ Cardholder's Name.				TOTAL AMOUNT		\$726.15
Card Number	Exp. Month	Ŷ	Exp. Year	, v.)		Pay a	nd Post Renewal
CVV Number: ACH payment ACH payment Lead council Lead council processing for my pay Pay at Council					payment option. Please select need to provide a form of pay	ability to verify all fees and choo Pay at Council as your option. Y ment to the local council in orde en your payment option, click th	ou will then to register

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.

UNIT CHARTER RENIVAL REPORT PACKAGE Jamp Bilder They Bilder They Address Addre	Boy Scouts of America Has Sent You Charter to Sign	
Tarkan Bandari Tarak Paras (J	Boy Scouts of America (Boy Scouts of America) says: "Greetings! You've been designated to review and verify the charter renewal of the attached Boy Scouts of America unit. Please review the charter and sign at your earliest convenience. Attention Unit Leader: If you have not discussed approval with the Chartered Organization Representative or received consent to proceed do not sign the document." Click here to review and sign Charter. You are one of a group of signers who can sign this document. Only one of you needs to sign. The group	
rep1x1	After you sign Charter, all parties will receive a final PDF copy by email.	

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