

INTERNET RECHARTER PACKET

For July 1, 2023 - June 30, 2024



SANTA FE TRAIL COUNCIL RECHARTER INSTRUCTIONS

Key Contacts:

Council Commissioner

Paul Doi – pakdoi@hotmail.com

Council Staff:

Vanessa Tiede <u>vanessa.tiede@scouting.org</u>
Angelina Fosdick <u>angelina.fosdick@scouting.org</u>

Office Manager/Registrar Assistant Registrar

402 E Fulton Street, Suite 4 Garden City, KS 67846 620-275-5162 ~ www.sftcbsa.org

TABLE OF CONTENTS

Important Things to Remember2
Scout' Life Subscriptions2
Rechartering Tips for Success3
Position Codes4
Scouter Reserve Positions 5
Multiple Registrations5
Unit Key 3 6
Frequently Asked Questions6-7
Commonly Made Mistakes7
Getting Started
Updating Online Roster9
Changing a Position
Adding a New Member 11
Uploading Documents
Remove From Recharter
Validating Recharter
Printing the Recharter Roster16
Making the Payment

NOTE

Registration Fee for 2023-2024 \$75 per youth \$45 per adult \$25 for new youth – joining fee **Scout Life** for 2023-2024

Annual Unit Liability Fee for 2023-2024 is \$100 per unit

\$15 per subscription

**Be "ON TIME – ERROR FREE"
Every hour spent by volunteer and
Council staff chasing down late
recharters and fixing errors can't be
spent helping youth.

Thank you, in advance for helping us make the most effective use of our limited resources while we assist you in providing the best possible Scouting programs for the youth of our area!

IMPORTANT THINGS TO REMEMBER

- All Adult registered leaders must complete <u>Youth Protection Training</u> prior to their first registration and every year following and must be current at recharter time. Adults without current Youth Protection Training will be dropped from the unit during the recharter process. This could suspend an entire Units Registration. Dropped adult leaders are eligible for reregistration by submitting a new adult application with Youth Protection Training completion certificate attached.
- Please make sure all mailing addresses and email addresses are up to date. Returned mail means a Scouting family is missing out on valuable Scouting information.
- Use ONLY legal names on applications. <u>NO NICK NAMES!</u>
- Make sure all new Adult applications have the correct signatures (Applicant & Charter Rep), a Social Security number, a leadership position, Question #6 (Additional Information) is answered and the Disclosure Form and Youth Protection Training completion certificate are attached. If you need more Adult or youth applications, you can find them online at

Adult Application: https://filestore.scouting.org/filestore/pdf/524-501.pdf
Youth Application: https://filestore.scouting.org/filestore/pdf/524-501.pdf

■ Important note regarding the Recharter process — Council posting of the submitted recharters begins after the close of the membership year. Because of the volume, it can take a 6-8 weeks before all recharters are processed. This will affect your online advancement process and your rosters in Scoutbook. We do apologize for the inconvenience and will attempt to minimize the delay in your accessing the unit's most current roster in the Online Advancement System.

SCOUT' LIFE SUBSCRIPTIONS

SCOUT' LIFE Is Optional Essential! Unit leaders work hard to bring the best Scouting program possible to their unit members. Surveys and experience have shown that SCOUT' *LIFE* magazine is **ESSENTIAL** to a strong Scouting program. Successful leaders use **SCOUT' LIFE**.

Units can qualify for a 100% SCOUT' Life Streamer if every family receives one subscription.

INTERNET RECHARTERING TIPS FOR SUCCESS

From the Council Registrar

- 1. **Simplify your recharter process**: Turn in all new youth and adult registrations to the Council Office at least 14 days prior to starting your recharter. This will make the process go much faster.
- 2. Please make sure that when deleting, you delete the correct person and verify the membership ID number BEFORE deleting.
- 3. **NO ONE is to be marked as a transfer**; there are no transfers at recharter time.
- 4. There has to be at least 5 paying youth for a Unit to Recharter. Questions? Call the Council Office.
- 5. Check and confirm all multiple registrations. (See section on "Multiple Registrations")
- 6. If a Scout or adult leader wants *Scout' Life*, **please be sure to mark it** during the online rechartering process.
- 7. Only <u>New</u> members need applications. Please be sure to review the final recharter cover page to ensure all required paperwork is completed and attached. Cover page must be included even if no items are shown.
- 8. Social security numbers are no longer required to be input online during the recharter process. Only the council will be able to input SSN when processing adult leader applications.
- 9. Please make sure all <u>New</u> applications are completed, with signatures, birthdates and correct adult social security numbers. These must be attached to the recharter packet at turn-in. If a new member (adult or youth) is active in 2023, their application must be turned in to the office and a copy attached to the recharter indicating the earlier processing.
- 10. Please make sure that you print the roster once you have validated all the information and **BEFORE** you move to the next page. (**Print** 3 copies of the renewal application; one for the council, one for your commissioner & one for the unit)
 - P.S. Please make sure that all youth and adults that should be registered ARE registered. Unregistered youth and leaders are not covered by insurance and youth may not qualify for advancement.

Be sure to immediately turn in new applications at the West Scout Center anytime during the year.

POSITION CODES

Position codes – All positions can be held be male or female and the minimum age requirements for each position is in parentheses next to the position. These are all fee-paying positions – except LP, AP, & IH.

CR	Chartered Organizational Rep (21)	SM	Scoutmaster (21)
CC	Committee Chairman (21)	SA	Assistant Scoutmaster (18)
MC	Committee Member (21)	VC	Varsity Scout Coach (21)
TL	Tiger Cub Den Leader (21)	VA	Assistant Varsity Scout Coach (18)
CM	Cubmaster (21)	NL	Crew Advisor (21)
CA	Assistant Cubmaster (18)	NA	Crew Associate Advisor (21)
WL	Webelos Den Leader (21)	91U	Unit Scouter Reserve (21)
WA	Assistant Webelos Den Leader (18)	92U	Unit College Scouter Reserve (18)
DL	Den Leader (21)	92V	Venturing College Scouter Reserve (21)
DA	Assistant Den Leader (18)	AP	Tiger Cub Adult Partner (18) – No Fee
PC	Parent Coordinator (21)	LP	Lion Cub Adult Partner (18) – No Fee
PT	Pack Trainer (21)	IH	Institutional Head (21) – No Fee

Required Positions per Unit:

PACK IH, CR, CC, 2 MC's, or 1 MC and 1 PT, CM and one den leader, either a TL, DL or WL. There must be an Adult Partner for every registered Lion and Tiger Cub. (The CA, WA, DA, PC, PT, 91U, and 92U positions are optional)

TROOP IH, CR, CC, (2) MC's and SM. (The SA, PC, 91U, and 92U positions are optional)

CREW IH, CR, CC, (2) MC's and NL. (The NA, PC, 91U, and 92V positions are optional)

SCOUTER RESERVE POSITIONS

These positions are for adults that wish to remain on their unit rosters, without registering as an assistant leader or committee member when appropriate.

These positions use the same application, fees and registration process, as any other adult volunteer but the only training requirement is Youth Protection. Scouter Reservists do not need to complete Position Specific Leader training or any other adult leader training after completing YPT.

If the young person or adult continues to be highly active with the unit (attending at least 1 or 2 meetings per month and participating in several campouts or other activities during the Scouting program year), then registering them as an assistant leader may be more appropriate. In that case, they should complete both Position Specific Leader and Outdoor Leader trainings to be a more valuable asset to the unit.

UNIT COLLEGE SCOUTER RESERVE For Packs, Troops, and Teams (Position code 92U) Minimum age requirement of 18

VENTURING COLLEGE SCOUTER RESERVE For Venture Crews.

(Position code 92V) Minimum age requirement of 21

o If a young person is away at college, on a mission, or in the service and wants to stay registered with the unit, the Unit College Scouter Reserve or Venturing College Scouter Reserve would be the appropriate method of maintaining their registration with the unit.

UNIT SCOUTER RESERVE For Packs, Troops, Teams and Crews (Position code 91U) Minimum age requirement of 21

o If an adult supports the unit but is not an ongoing participant in meetings, activities and outings the Unit Scouter Reserve would be the appropriate method of maintaining their registration with the unit.

MULTIPLE REGISTRATIONS

Only the Chartered Organization Rep (CR) can hold more than one position in a unit. Be sure if you have leaders that are registered with multiple units, that you know which unit is paying their fees as they must submit their recharter first.

The CR may also serve in a multiple capacity as an assistant unit leader or member of the committee within that unit if there are not enough adults registered for these positions. The CR cannot serve as the unit leader (Cubmaster, Scoutmaster, or Crew Advisor).

Other adults may register in only one position per unit. If a unit feels that better service can be provided by an adult already serving in another unit, that individual may still hold only one position in each unit. There are no restrictions on the number of positions one person may hold as long as the individual serves only one position per unit.

Youths who are registered in Scouts BSA may multiple register as members of the Venturing crew or an Explorer Post. Youth members <u>may not</u> multiple register in like unit types.

Registration fees are paid only for an <u>individual's primary position</u>; there is no fee for multiple positions. Multiple registrants will only receive a membership certificate for their primary position.

Some leaders choose to have their primary registration with the district or council. Mark them as multiple in the recharter process and remind them to pay their 2023-2024 registration fees to the Scout office by June 1, 2023.

If a new individual is registering as a multiple, please indicate that on the application by writing MULTIPLE on the application. A youth cannot multiple register as an adult and an adult cannot multiple register as a youth.

UNIT KEY 3

The Unit Key 3 consists of the Unit Leader, the Chartered Organization Representative, and the Unit Committee Chairman. The Unit Key 3 is a critical component to the success of your unit. The Unit Key 3 meets once a month to discuss the unit, its challenges, coming events, and progress towards completing their action plan and Journey to Excellence goals. It is a time for the Unit Key 3 to spot early warning signs and work together toward continued unit success.

When rechartering the unit, please align your leadership to support and implement the Unit Key 3. This three-person structure ensures that each person contributes their individual unique strengths, abilities, and perspectives based on the focus of their assigned position.

COMPLETING THE RECHARTER

Please make sure that you complete the last step in the online recharting, by **SUBMITTING and PRINTING.**

- 1. Correct any "warning" messages before submitting and printing charter paperwork. Submit and Print final paperwork. (**Print 3 copies** one for the council, one for the commissioner, and one for the unit)
- 2. Gather all required signatures (for recharter and applications)
- 3. Collect fees that are due.
- 4. Complete the online Re-charter **before June 23, 2023**.
- 5. Please be aware that if there are any issues with your Recharter, it will not be posted until those issues are cleared up. So please check and double check your charter before submitting.

Note: All recharter fees are sent to the National Office. No registration fees remain with the local council.

FREQUENTLY ASKED QUESTIONS

Where can I get a copy of our current BSA Roster?

Rosters are emailed out in the beginning of April. The second option is to ask your unit Advancement Coordinator. The Unit Key 3 has the ability to create a roster through my.scouting.org.

I forgot my log in for Rechartering? Your log in is the same on Internet Advancement as it is for my.scouting.org.

How do we change our Chartering Organization?

Contact the Council Office for a new unit application to your Recharter, along with a letter from the previous Organization releasing the number and all property to the new Organization.

Can a youth be registered in two units at the same time?

A youth can be registered in a Troop and multiple in a Crew and/or Post at no cost. Youth may not register in two of the same type units.

Why is my Charter not posted? *Note: Please contact the West Council Service Center for more details.* There can be several reasons for this:

- a. Youth Protection Training was not completed for all adults
- b. Fees have not been paid
- c. Charter was not submitted correctly online
- d. Other recharters from the same Chartered Partner are still outstanding.

I changed a unit leader, but they are not on my Recharter Printout?

There was no application submitted or the application was incomplete.

I submitted my Recharter online to the Council and forgot to add someone, what can I do?

1) If you have already submitted online, turn in application to the council office and indicate it is for the recharter and pay applicable fees.

Why do you need my Social security number?

All adults must supply their social security for a National background check. It is BSA policy.

I'm changing my position do I need to fill out a new application?

Only if the Unit Leader or Charter Representative are changing.

What do I do if the scout has the incorrect rank?

Sign into Scoutbook to verify the rank shown. Update on Scoutbook and submit a completed Advancement Report to the scout office.

What do I do if the scout is shown in the incorrect grade?

Contact the scout office registrar to make the change.

COMMONLY MADE MISTAKES

1. No signatures or incorrect signatures on adult applications and Recharter.

- a. Adult applications should have the Committee Chair and Charter Reps signature.
- b. Recharter should have Executive Officer (IH) and the Unit Leader signature.

2. No fee or wrong amount attached.

a. Remember NO ONE is a transfer at Recharter time.

3. **Applications missing.**

- a. Make sure there are applications for everyone listed on the front of the Recharter.
- b. Please be aware that even if you turned in an application for someone 6 months ago if they are listed on the front of the Recharter, please supply a new application or make a copy of the unit's copy of the previous submission with social security number added.
- 4. Incomplete Applications.
 - a. Adults missing Social Security number, not answering Question #6, and/or Disclosure form not attached or signed.
 - b. Youth missing parent information (important especially for Lions or Tigers) and/or missing birthdates.

GETTING STARTED

Congratulations, you have been selected as the Online Recharter Processor for your unit. The Online Rechartering process is great because you will be in complete control of your information - this ensures that it will be correct, and you can do it from home or office, anytime that is convenient for you. It's a secure and easy-to-use system.

Beginning Monday May 1, 2023, the Online Re-charter access will open.

All charters must be processed by June 23, 2023, or your unit will lapse on July 1, 2023. This means no meetings, outings, insurance, etc. Don't let this happen to your Scouts!

Here is what you'll need to get started:

1. The website: www.sftcbsa.org, click on "Resources" at the top of the page, then "Scoutbook & Recharter" shown on the top left of the page.

2. Gather all information needed to start recharter:

- a. Current Unit Roster (was emailed out to every unit leader in April). Also, the Unit Key 3, has the ability to create a roster through <u>my.scouting.org</u>.
- b. List of youth and adults to remain on roster.
- c. List of youth and adults to be removed from roster.
- d. List of youth and adult that want Scout' Life.
- e. Completed applications of <u>New</u> youth and adults (with disclosure forms for <u>New</u> adults).
- f. Youth Protection Training certificates for all new adults & list of YPT completion dates for returning adults.

Once you have logged onto Scoutbook, you will select "Internet Advancement" on the first screen:

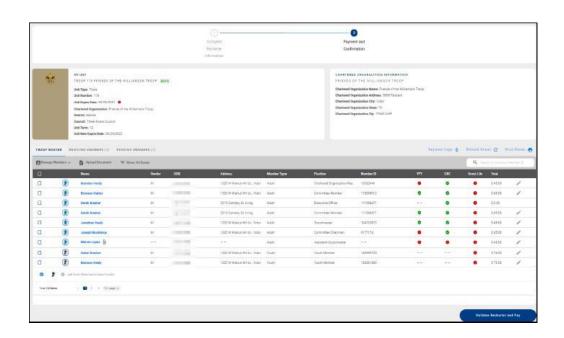


Open Recharter



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

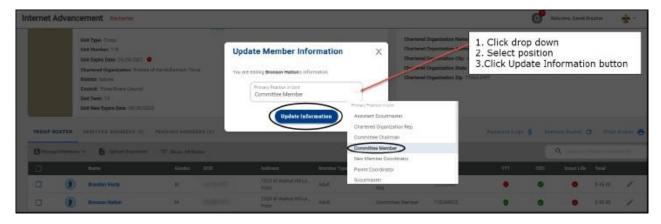
- YPT Red Exclamation Point Youth Protection Training has not been completed and recorded in the person profile or the YPT has expired
- YPT Green Exclamation Point Youth Protection Training is current
- CBC Green Checkmark New Criminal Background Disclosure has been received and recorded in the person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



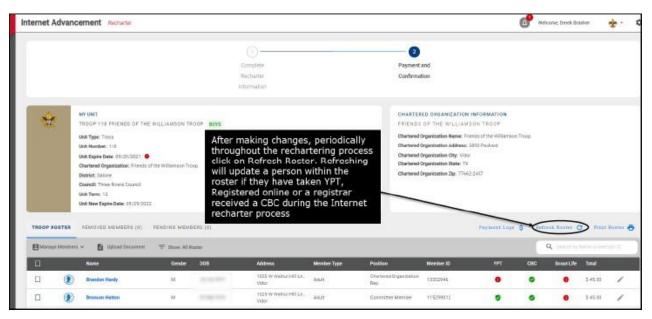
Changing a position

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.



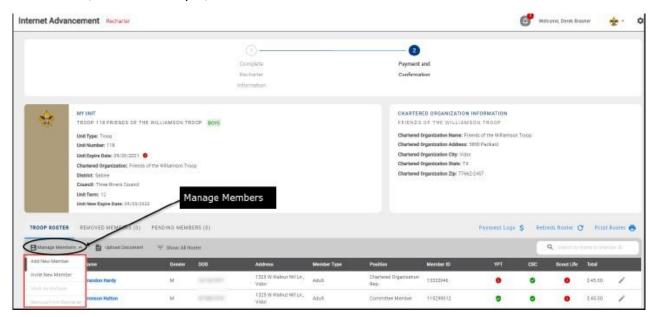


Refreshing your roster



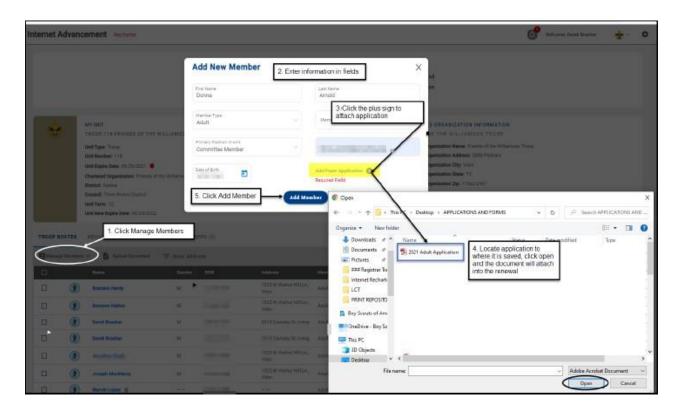
Manage Members

Add a new adult, mark as multiple, remove from roster and invite new member.



Adding a New Member

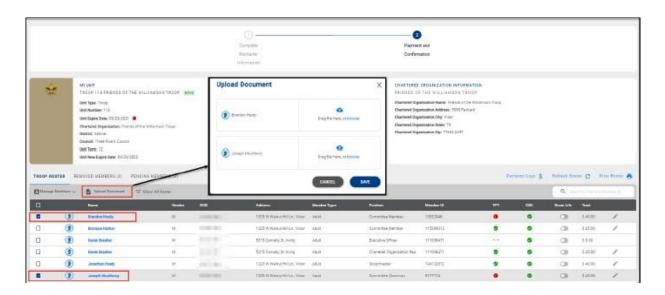
Click on Manage Members>Add New Member>Enter all required information>Click on the Plus sign next to Add Paper Application>Select the file and attach the application >Click the Add Member button.



Uploading a Group of Documents into the Renewal

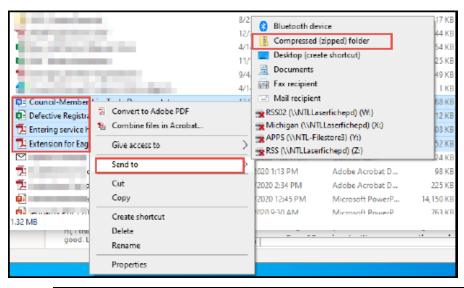
A group of documents, preferably in a zip file, can be uploaded into the renewal. They are Adult and Youth Applications, Criminal Background Authorizations, Youth Protection Training Certificate, CORI Form and PA background records. Select the individuals that you are uploading

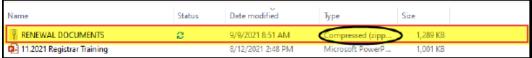
checking the box next to their name and click upload documents. A popup will appear and this is where you load the zip file of documents.



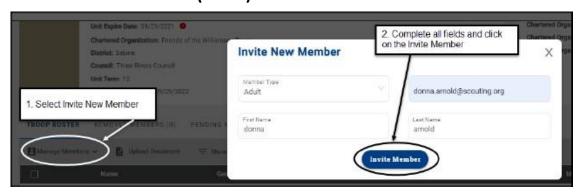
Creating a Zip File for loading documents

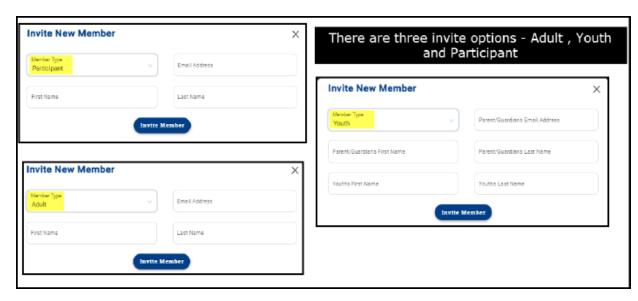
If you are uploading a group of files, use your Zip File option by highlighting the documents, right click after highlighting the documents and select Send to and next select Compressed (zipped) folder. Once you have created the zip file and named your zip folder, choose the folder when clicking the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



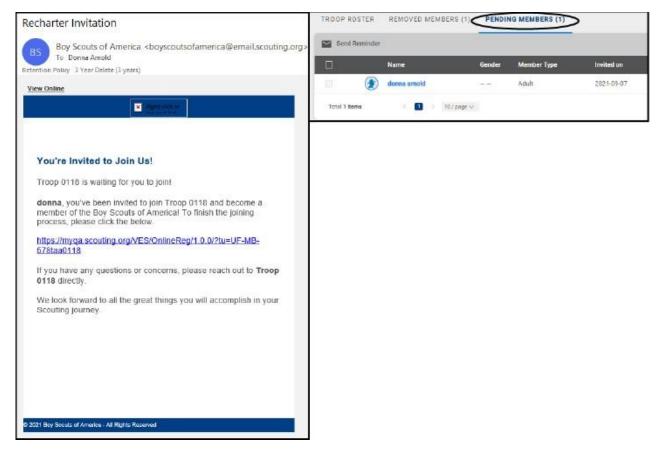


Invite New Member into the unit (Leads)





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.



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.



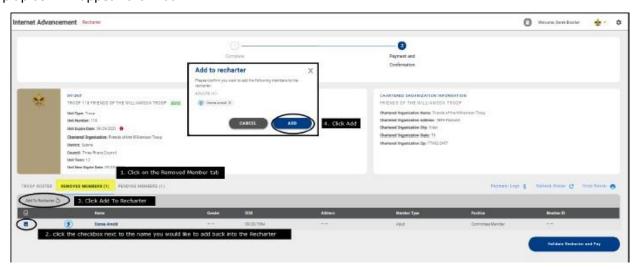




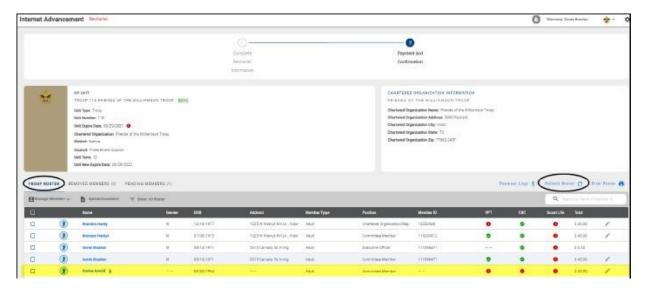
Adding An Individual Back Into The Recharter After Removing Them

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

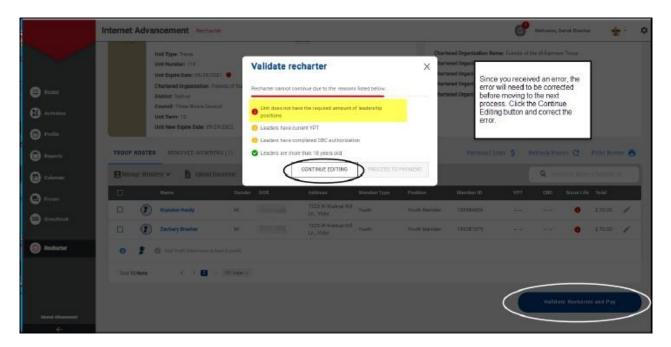


Once you click Add, the youth or adult will move back into the unit. Click on Troop Roster tab and the roster should now reflect the add. Once added, click Refresh Roster and continue with renewal submittal.



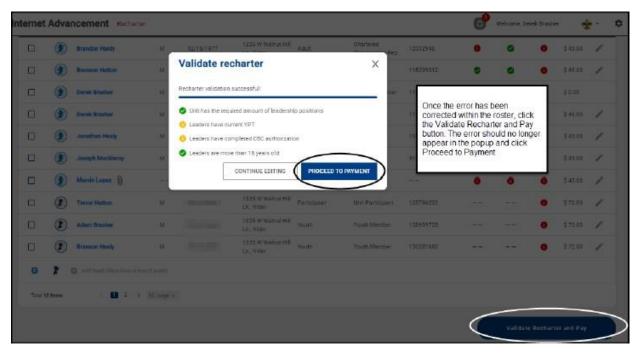
Validate Recharter and Pay

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 If you have any errors or warnings. At that time you will need to correct the 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, you have the ability to correct the warnings if possible and continue through the submittal process.



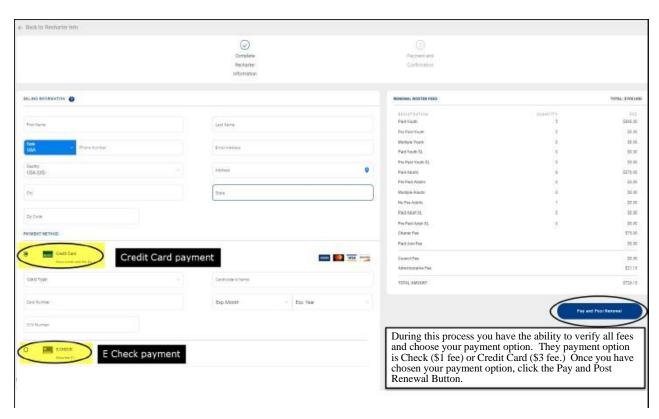
Once the error has been corrected within the roster, click the Validate Recharter and Pay button. If there are no errors and only warnings and you are ready to submit your unit, click the Proceed to Payment button. There is a possibility that you will have no errors or warnings and in this case you may also proceed to payment.

Here is where you print your roster by clicking the "**Print Roster**" 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 payment option is Check (\$1 fee) or Credit Card (3% fee). Once you have chosen your payment option, click the Pay and Post Renewal button.



Once you have "posted" the renewal, the Committee Chair (CC) and Charter Representative (CR) will receive an email that you have submitted the charter. They will also NEED to "sign" (digitally).

Be sure to check "spam" folders as it will come from: adobesign@adobesign.com or boyscoutsofamerica@email.scouting.org

