Marin Council, BSA

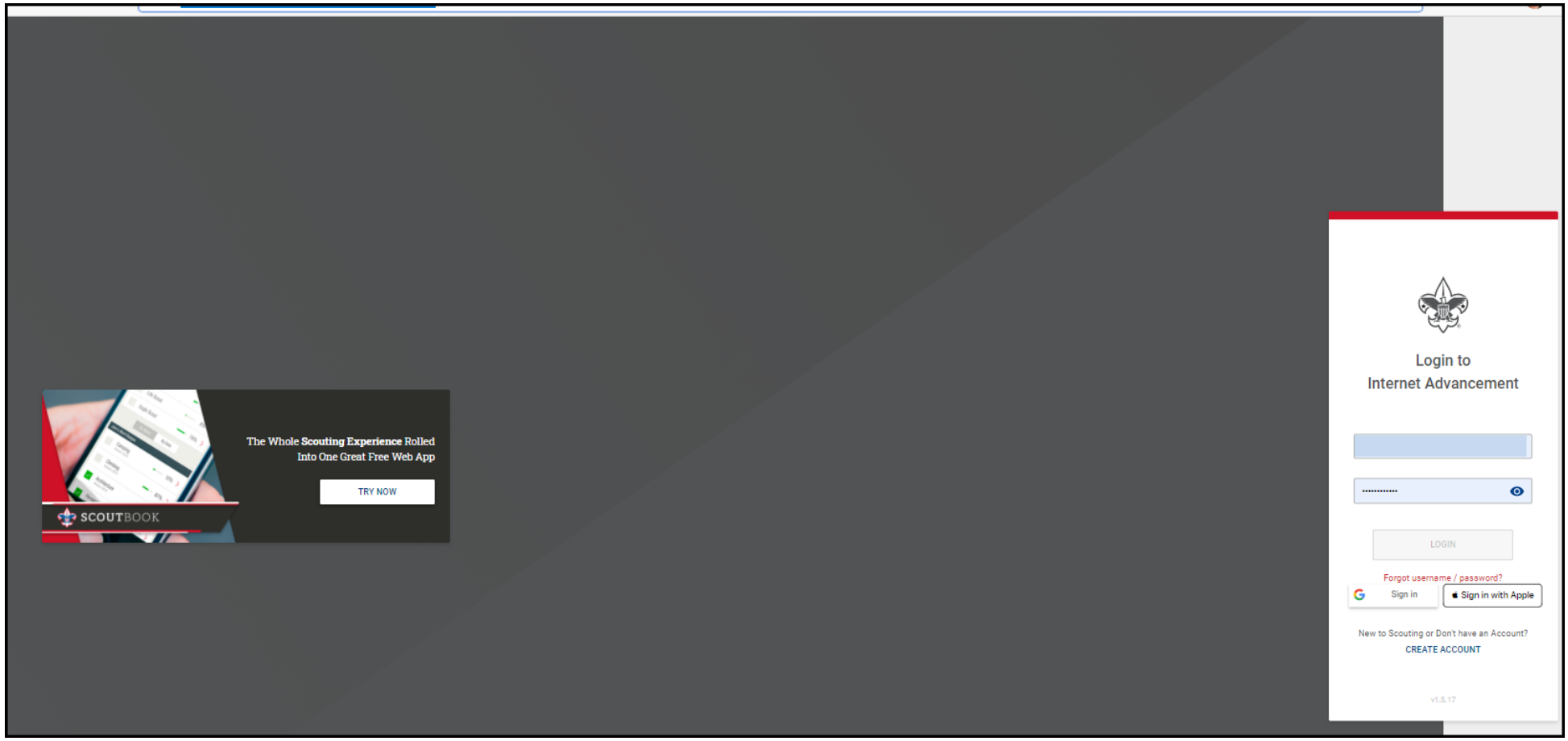
Annual Charter Renewal 2.0

Internet User Guide

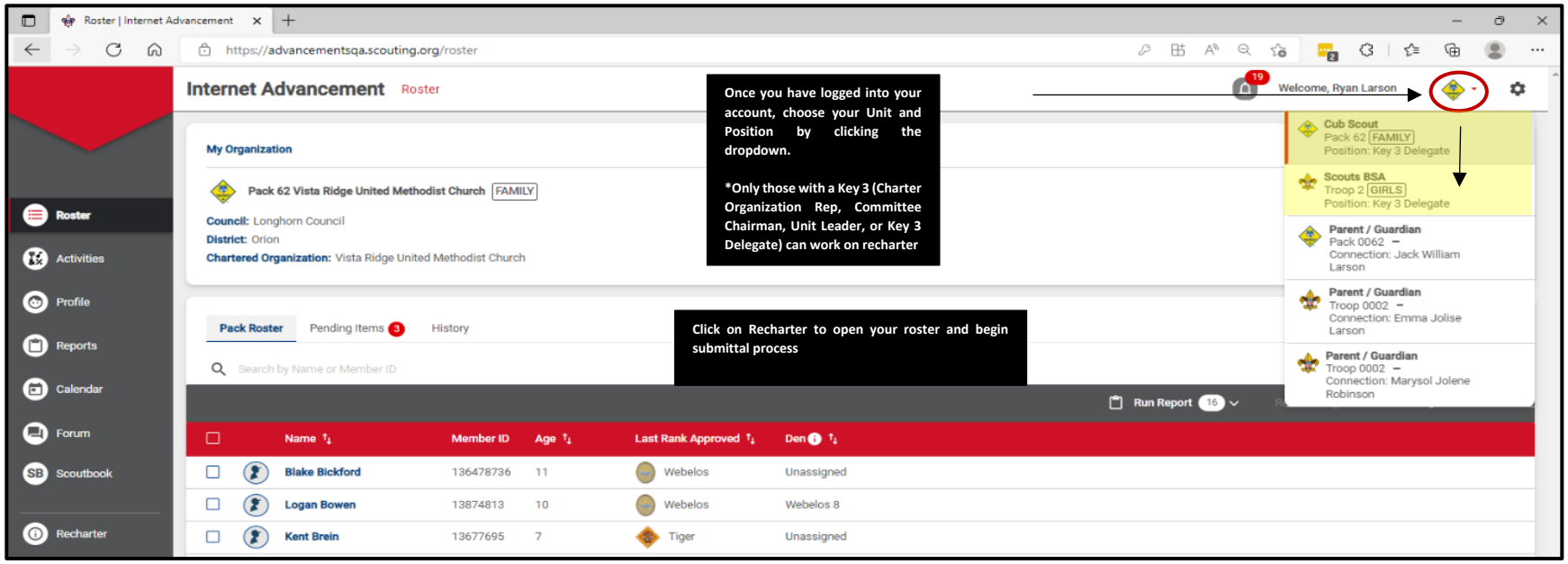
Internet Rechartering may be accessed by the Unit Leader, Charter Org Rep, Committee Chairman or Key 3 Delegate by logging into their Scoutbook.com or my.Scouting Account or directly at

https://advancements.scouting.org/

Note: Be sure to read **all** 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/

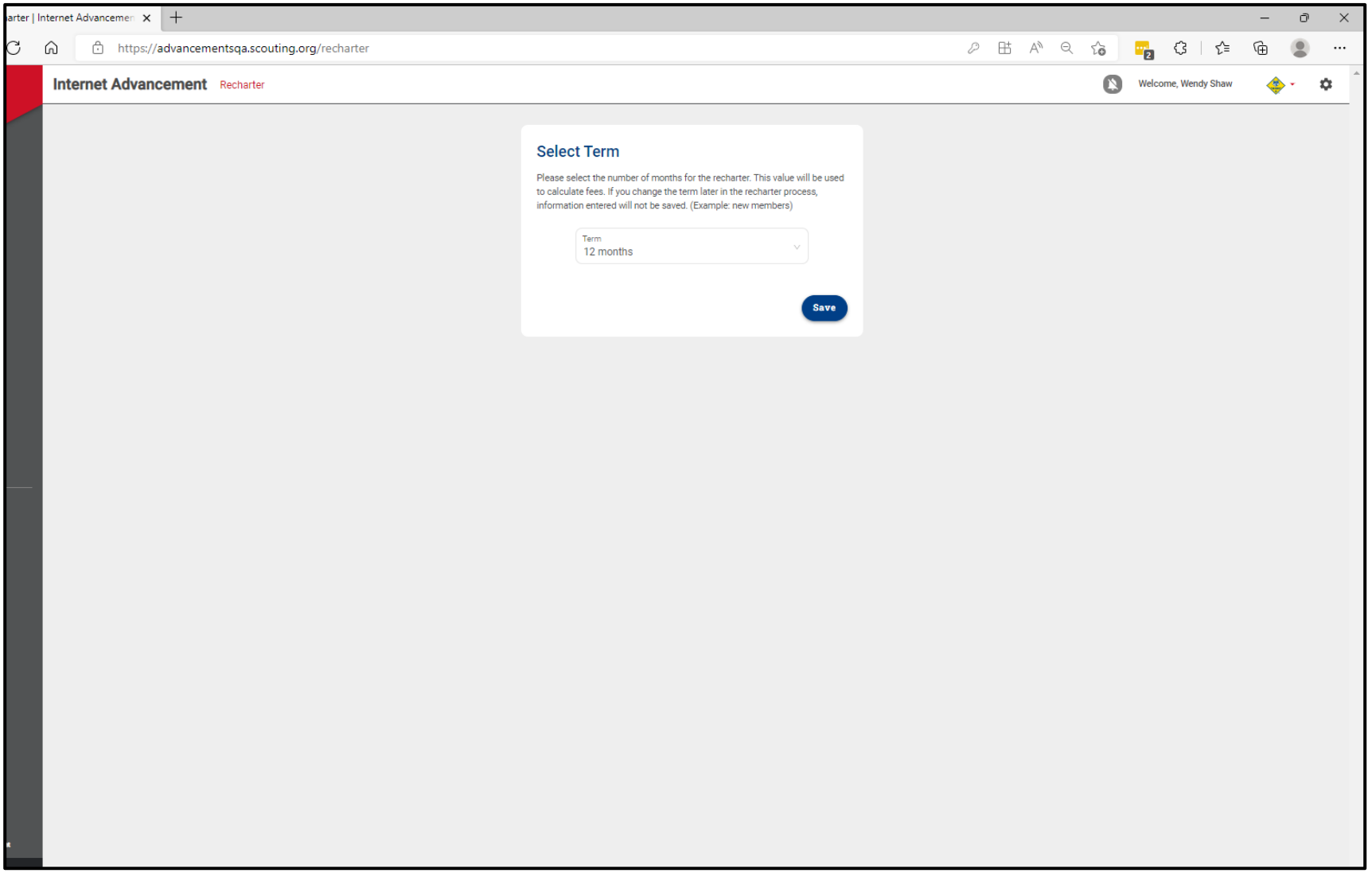


Open Recharter



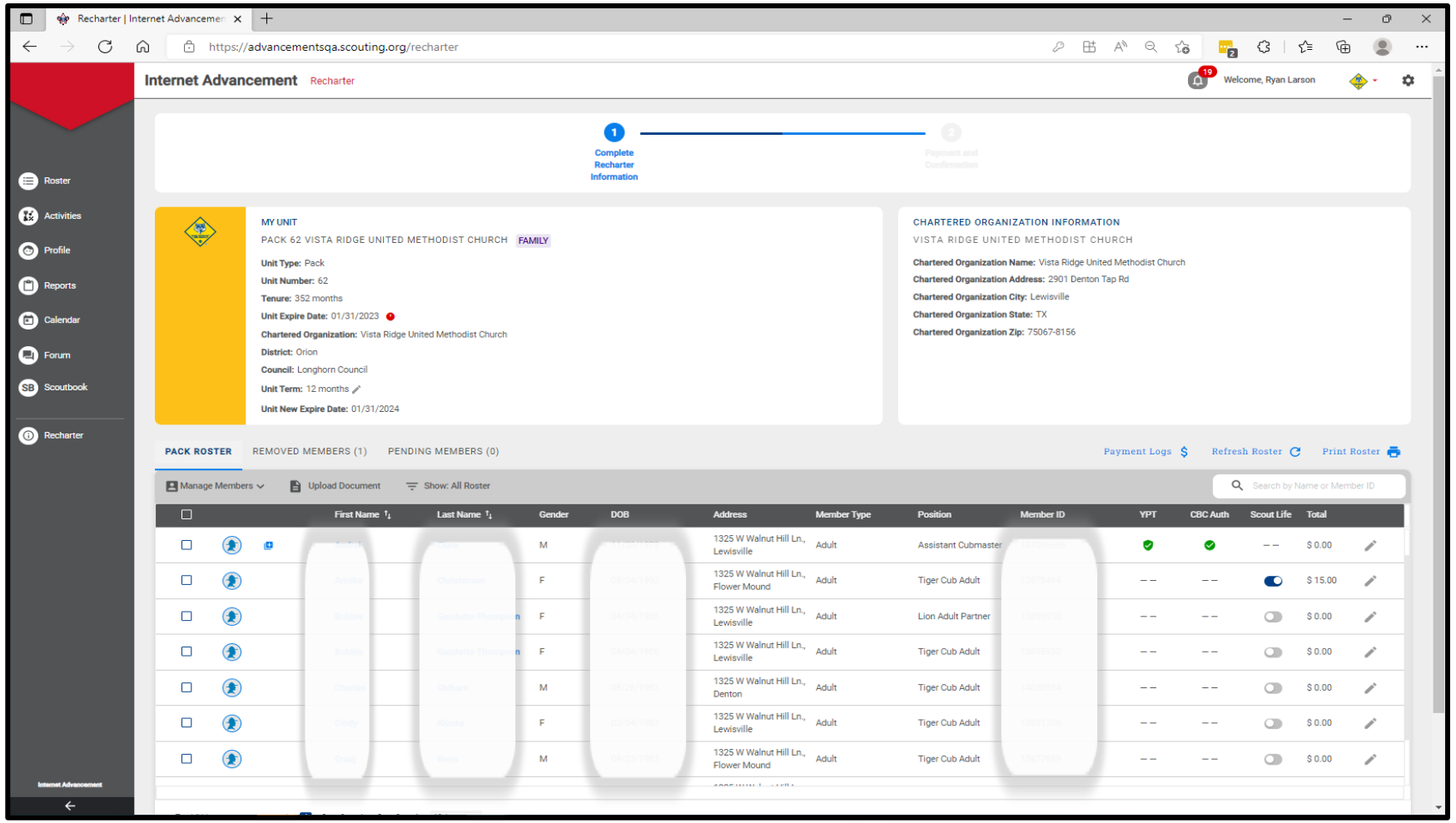
Select your recharter term.

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.



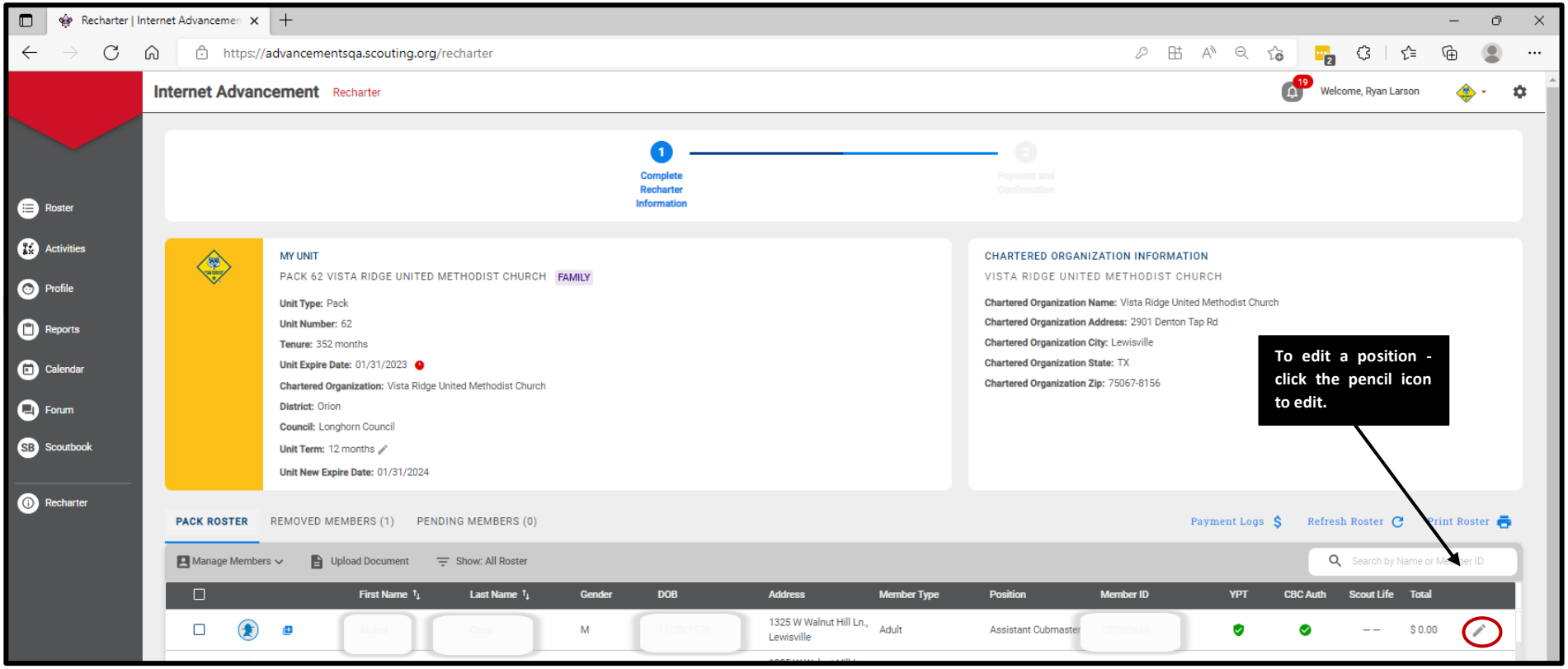
Once the roster is loaded, you may start editing the roster

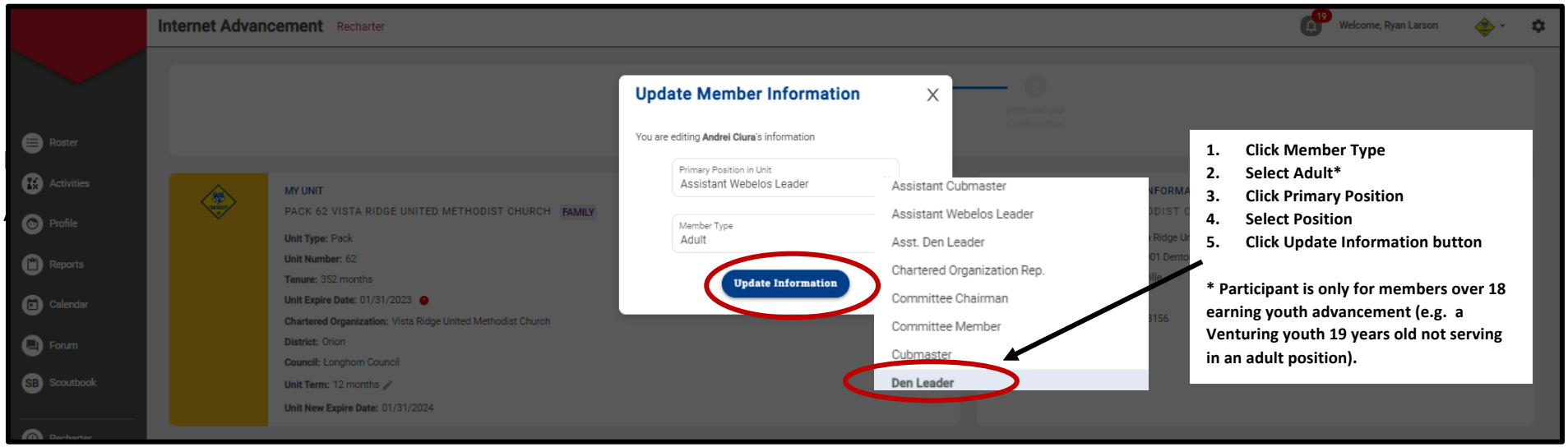
- YPT - Red Exclamation Point – Youth Protection Training has not been completed and recorded in the person profile or the YPT has expired
- YPT - Green Checkmark – Youth Protection Training is current
- CBC Auth - Green Checkmark – New Criminal Background Disclosure has been received and recorded in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

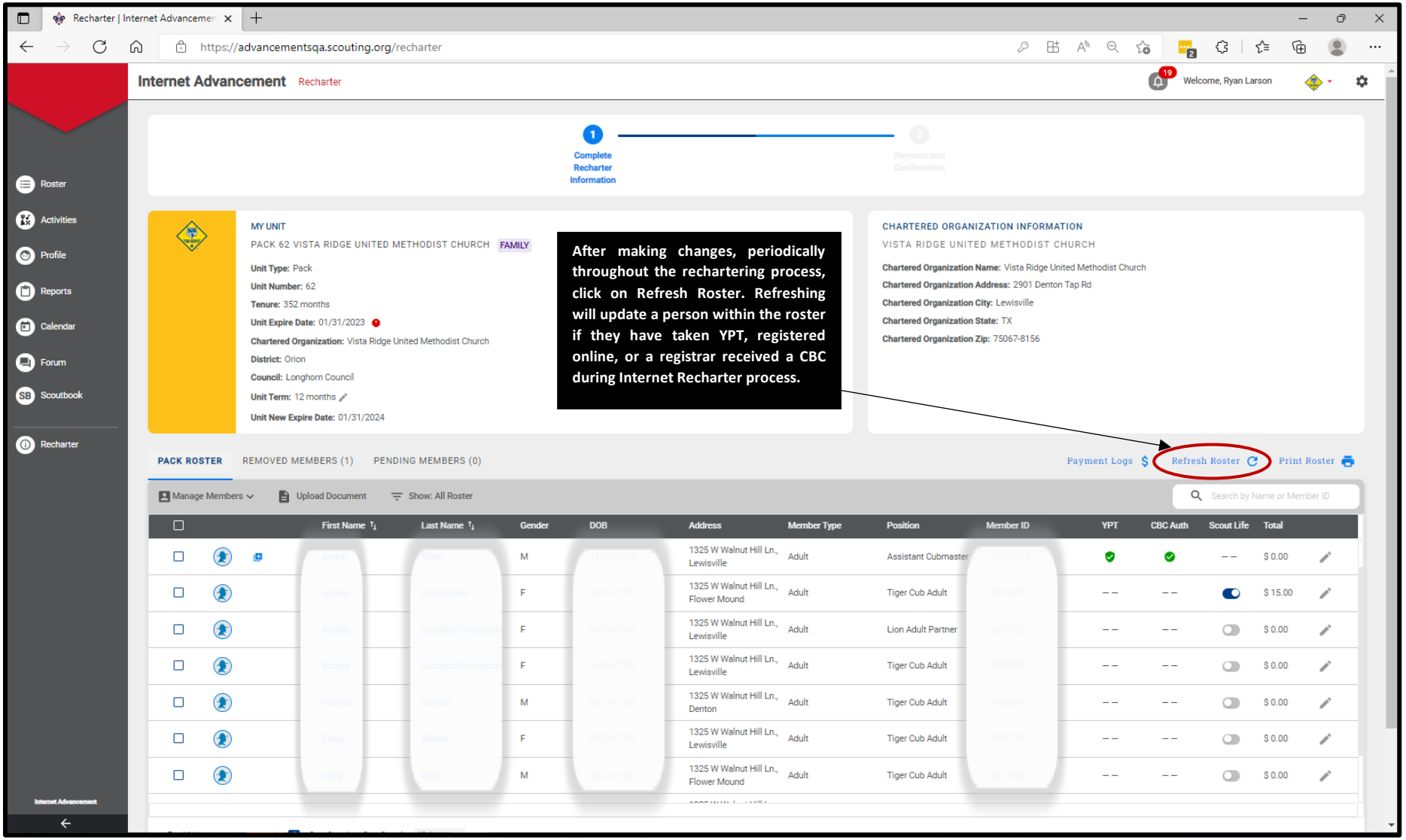


Changing an adult leader position

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.



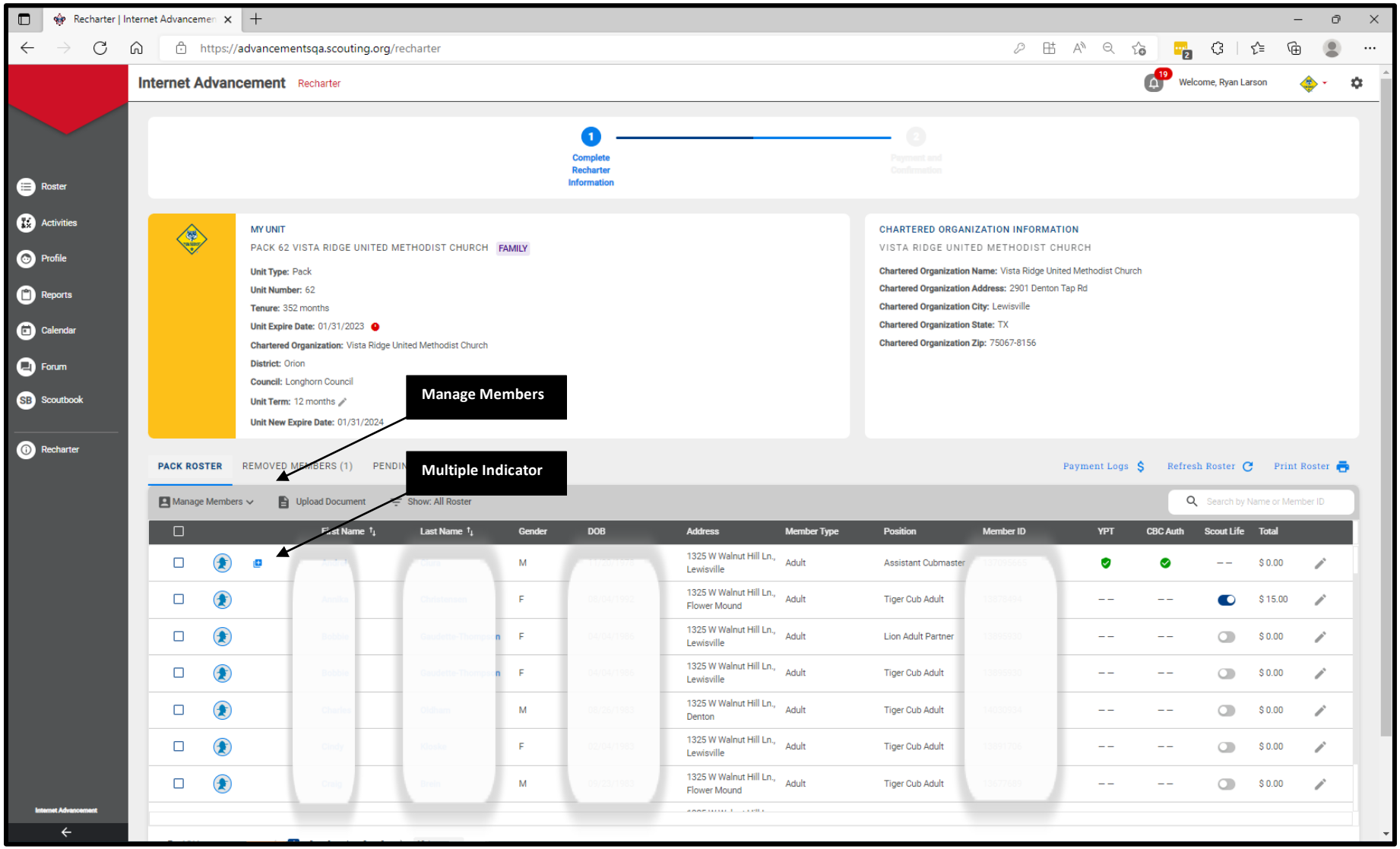



Recharter | Internet Advancemen
https://advancementsqa.scouting.org/recharter
Internet Advancement
Recharter
19
Welcome, Ryan Larson
Roster
Activities
Profile
Reports
Calendar
Forum
Scoutbook
Recharter
Internet Advancement
1
Complete Recharter Information
2
Payment and Confirmation
MY UNIT
PACK 62 VISTA RIDGE UNITED METHODIST CHURCH
FAMILY
Unit Type: Pack
Unit Number: 62
Tenure: 352 months
Unit Expire Date: 01/31/2023
Chartered Organization: Vista Ridge United Methodist Church
District: Orion
Council: Longhorn Council
Unit Term: 12 months
Unit New Expire Date: 01/31/2024
After making changes, periodically throughout the rechartering process, click on Refresh Roster. Refreshing will update a person within the roster if they have taken YPT, registered online, or a registrar received a CBC during Internet Recharter process.
CHARTERED ORGANIZATION INFORMATION
VISTA RIDGE UNITED METHODIST CHURCH
Chartered Organization Name: Vista Ridge United Methodist Church
Chartered Organization Address: 2901 Denton Tap Rd
Chartered Organization City: Lewisville
Chartered Organization State: TX
Chartered Organization Zip: 75067-8156
PACK ROSTER
REMOVED MEMBERS (1)
PENDING MEMBERS (0)
Payment Logs
Refresh Roster
Print Roster
Manage Members
Upload Document
Show: All Roster
Search by Name or Member ID
First Name
Last Name
Gender
DOB
Address
Member Type
Position
Member ID
YPT
CBC Auth
Scout Life
Total
M
1325 W Walnut Hill Ln., Lewisville
Adult
Assistant Cubmaster
$ 0.00
F
1325 W Walnut Hill Ln., Flower Mound
Adult
Tiger Cub Adult
$ 15.00
F
1325 W Walnut Hill Ln., Lewisville
Adult
Lion Adult Partner
$ 0.00
F
1325 W Walnut Hill Ln., Lewisville
Adult
Tiger Cub Adult
$ 0.00
M
1325 W Walnut Hill Ln., Denton
Adult
Tiger Cub Adult
$ 0.00
F
1325 W Walnut Hill Ln., Lewisville
Adult
Tiger Cub Adult
$ 0.00
M
1325 W Walnut Hill Ln., Flower Mound
Adult
Tiger Cub Adult
$ 0.00

Adding an Existing Member of Another Unit

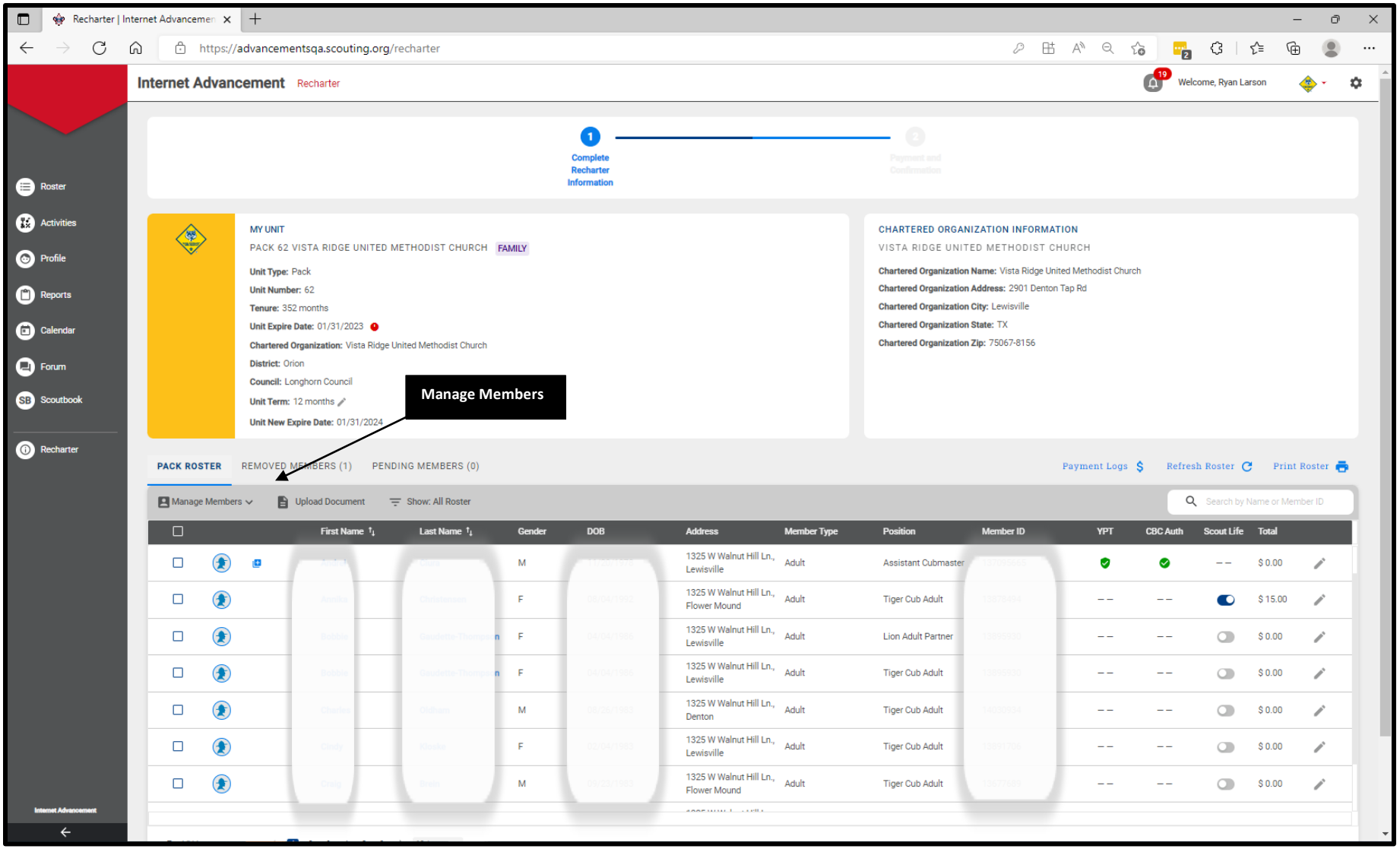
Click on Manage Members>Add New Member>Click Existing Member>Enter all required information>Click the Add Member button. The member will show a "+" by their name to indicate they are paying their registration fees in another unit. If they are paying their registration fees in your unit, click the checkbox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

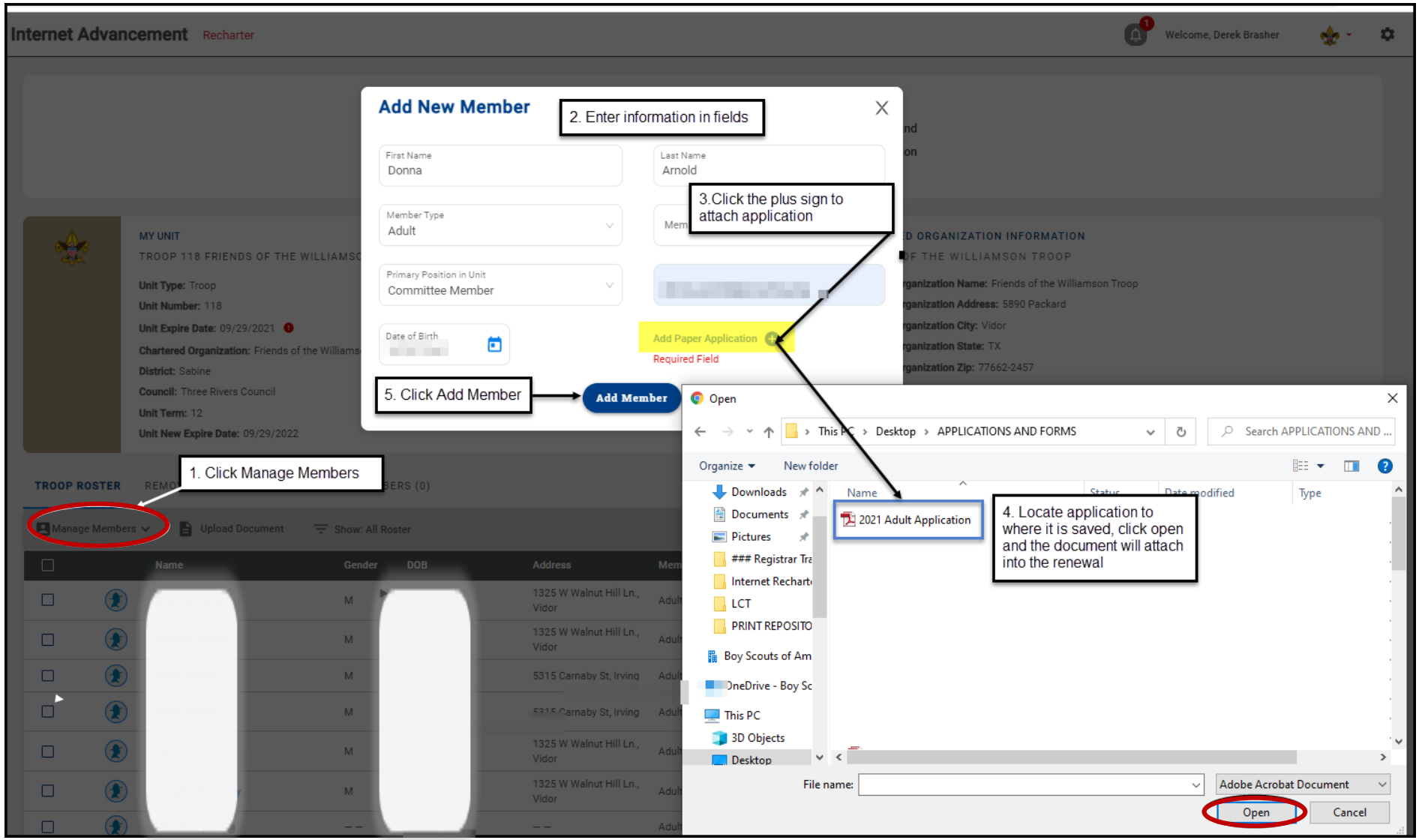
If they are an adult, be sure to add a signed adult application for the new adult member from another unit by clicking the checkbox by their name>Upload Document>Select a file of the application>Click Save



Adding a New Member

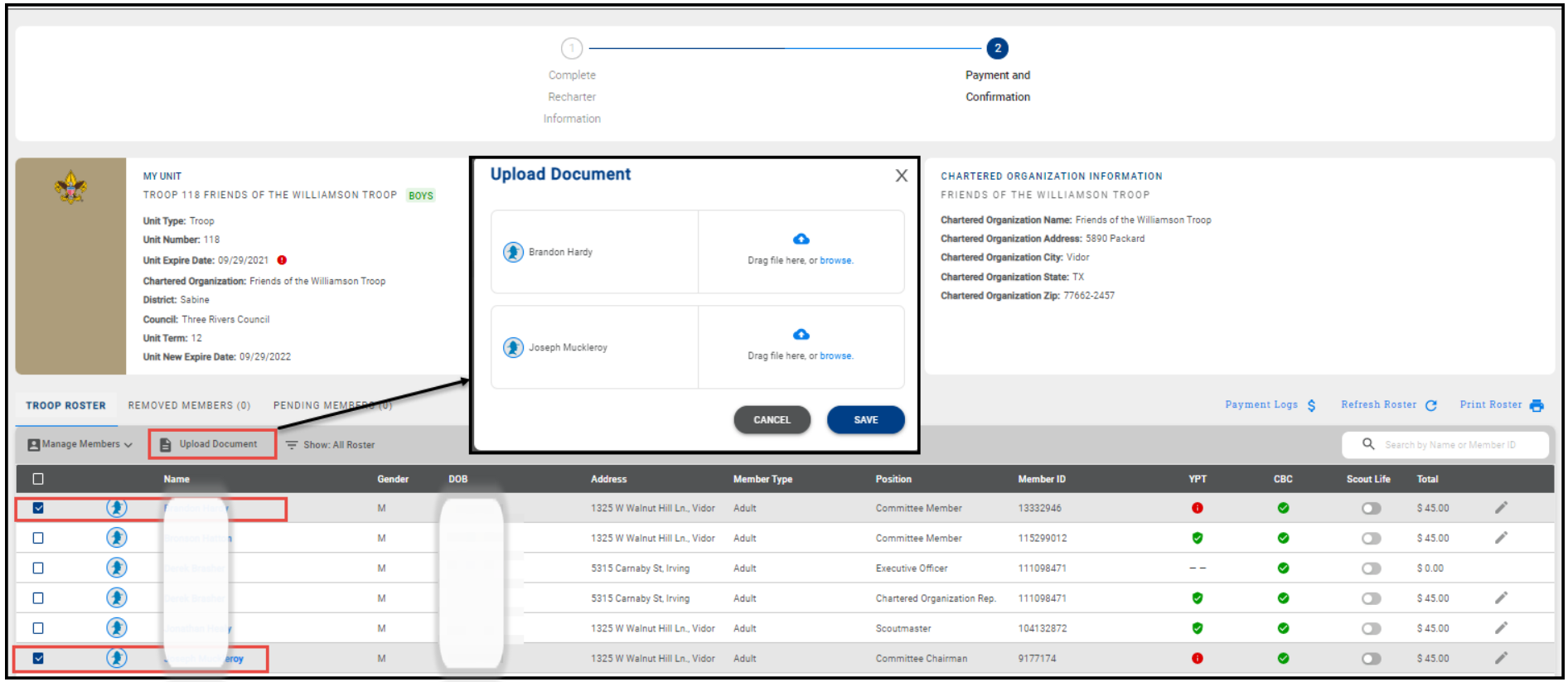
Click on Manage Members>Add New Member>Enter all required information>Click on the “+” sign next to Add Paper Application>Select the file and attach the application >Click the Add Member button.




Internet Advancement
Recharter
Welcome, Derek Brasher
Add New Member
2. Enter information in fields
First Name
Donna
Last Name
Arnold
Member Type
Adult
3.Click the plus sign to attach application
Primary Position in Unit
Committee Member
Date of Birth
Add Paper Application
Required Field
5. Click Add Member
Add Member
MY UNIT
TROOP 118 FRIENDS OF THE WILLIAMS
Unit Type: Troop
Unit Number: 118
Unit Expire Date: 09/29/2021
Chartered Organization: Friends of the Williams
District: Sabine
Council: Three Rivers Council
Unit Term: 12
Unit New Expire Date: 09/29/2022
ORGANIZATION INFORMATION
OF THE WILLIAMSON TROOP
Organization Name: Friends of the Williamson Troop
Organization Address: 5890 Packard
Organization City: Vidor
Organization State: TX
Organization Zip: 77662-2457
1. Click Manage Members
TROOP ROSTER
Manage Members
Upload Document
Show: All Roster
Name
Gender
DOB
Address
Open
This PC
Desktop
APPLICATIONS AND FORMS
Search APPLICATIONS AND ...
Organize
New folder
Downloads
Documents
Pictures
Internet Rechart
LCT
PRINT REPOSITO
Boy Scouts of Am
OneDrive - Boy Sc
This PC
3D Objects
Desktop
Name
Status
Date modified
Type
2021 Adult Application
4. Locate application to where it is saved, click open and the document will attach into the renewal
File name:
Adobe Acrobat Document
Open
Cancel

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.

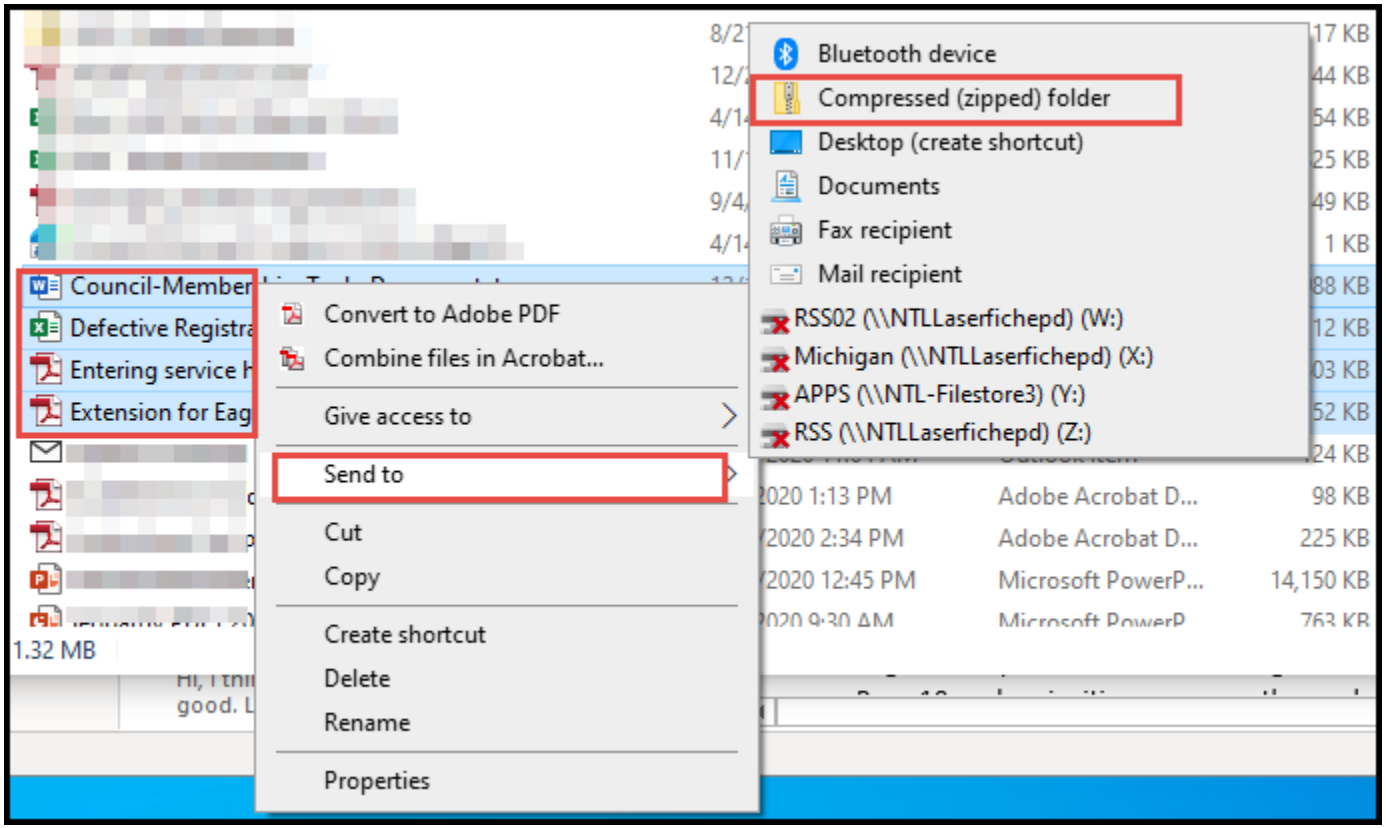


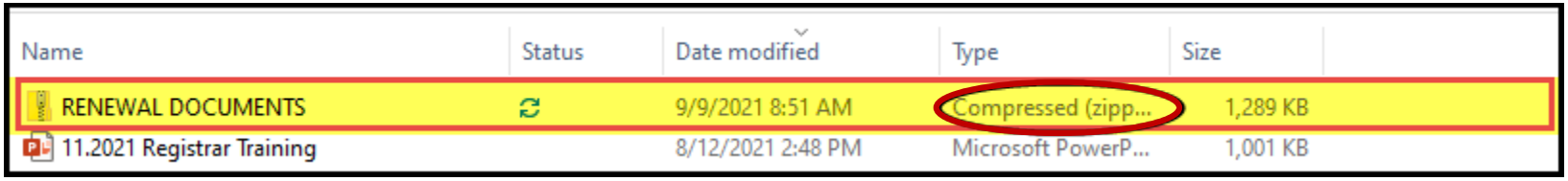
Promoting a Member

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.



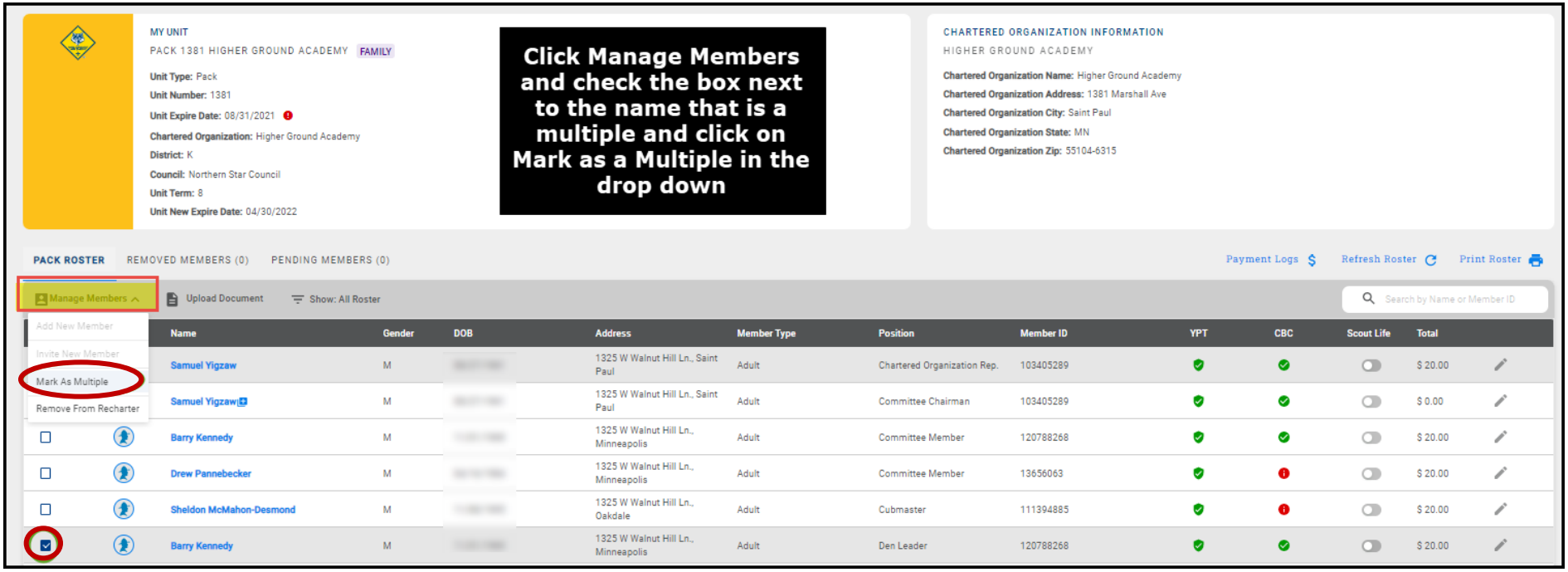


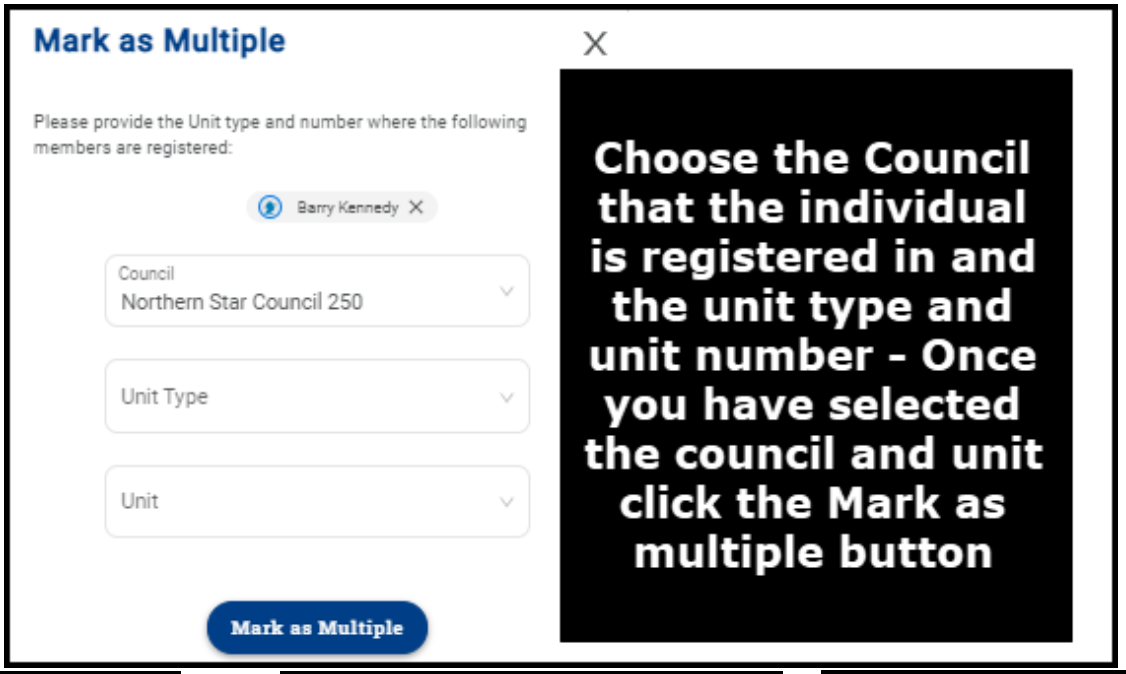
Adding a Multiple

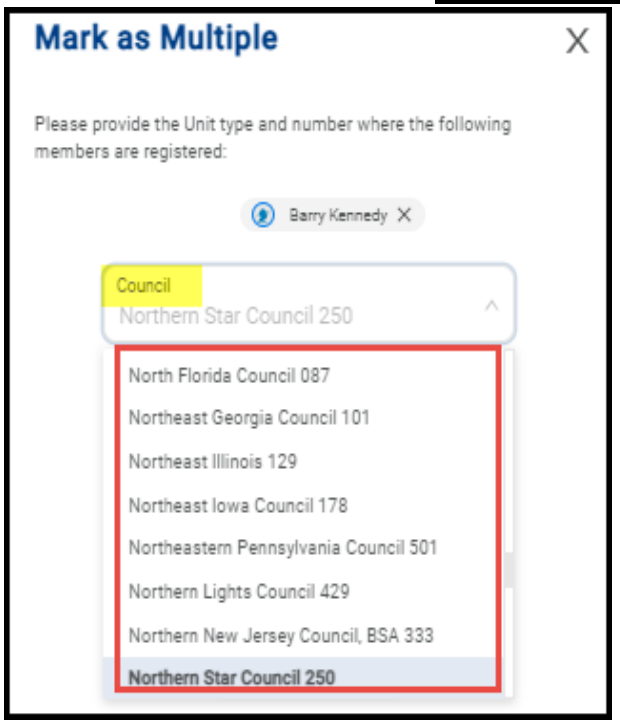
If an individual is paying in another unit, you have the ability to register them in your unit(s) as a multiple and no fee is collected. The unit listed as the multiple unit is the unit they through which they will be paying their recharter fees. If an individual is paying in a council level position,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

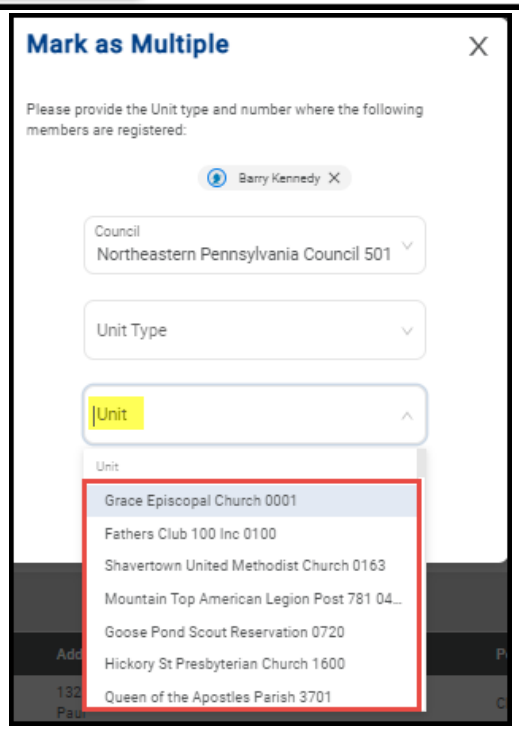
Note 1: For those multipling from a council position select “Non-unit Position”

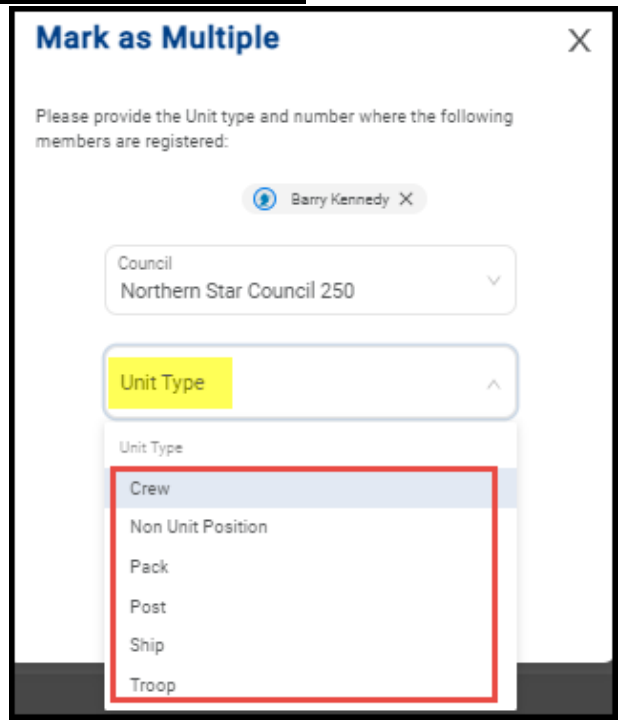
Note 2: The Charter Org Representative is the only individual that can multiple in more than one postion as a committee chair or committee member only. No other adult leaders can multiple in more than one position within the same unit.



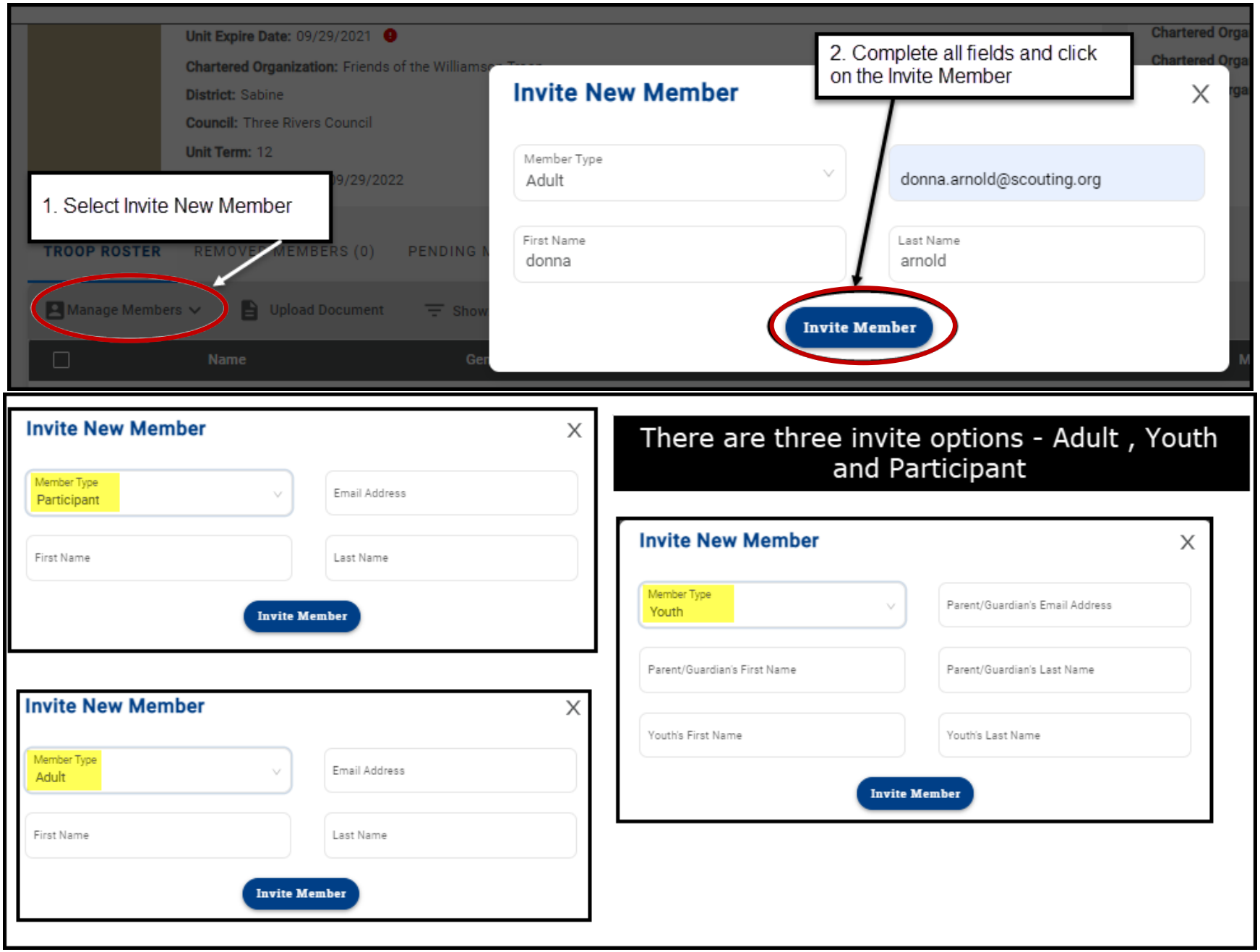

Mark as Multiple
Please provide the Unit type and number where the following members are registered:
Barry Kennedy
Council
Northern Star Council 250
Unit Type
Unit
Mark as Multiple
Choose the Council that the individual is registered in and the unit type and unit number - Once you have selected the council and unit click the Mark as multiple button


Mark as Multiple
Please provide the Unit type and number where the following members are registered:
Barry Kennedy
Council
Northern Star Council 250
North Florida Council 087
Northeast Georgia Council 101
Northeast Illinois 129
Northeast Iowa Council 178
Northeastern Pennsylvania Council 501
Northern Lights Council 429
Northern New Jersey Council, BSA 333
Northern Star Council 250

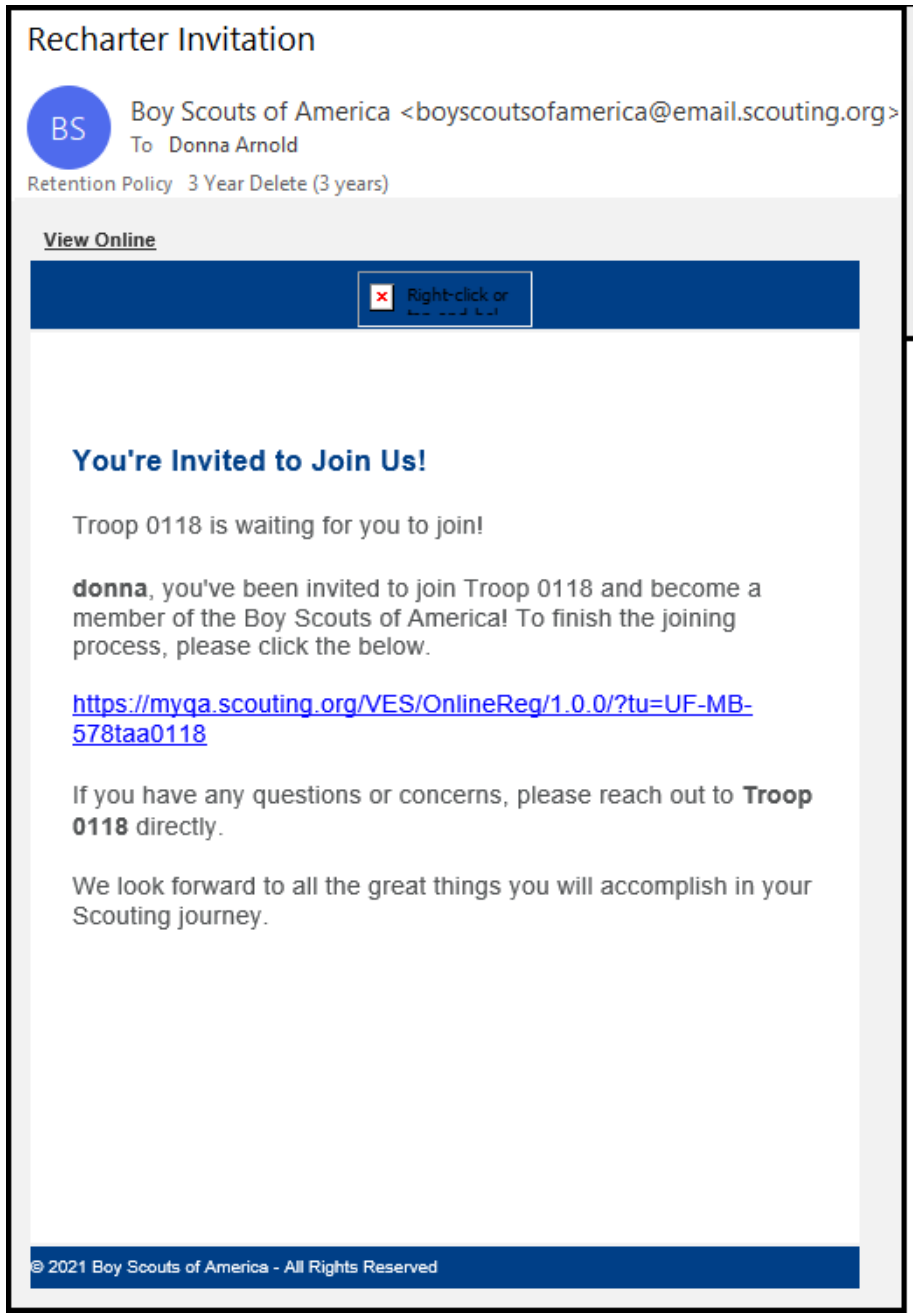

Mark as Multiple
Please provide the Unit type and number where the following members are registered:
Barry Kennedy
Council
Northeastern Pennsylvania Council 501
Unit Type
Unit
Grace Episcopal Church 0001
Fathers Club 100 Inc 0100
Shavertown United Methodist Church 0163
Mountain Top American Legion Post 781 04...
Goose Pond Scout Reservation 0720
Hickory St Presbyterian Church 1600
Queen of the Apostles Parish 3701


Mark as Multiple
Please provide the Unit type and number where the following members are registered:
Barry Kennedy
Council
Northern Star Council 250
Unit Type
Crew
Non Unit Position
Pack
Post
Ship
Troop

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

BS

Boy Scouts of America <boyscoutsofamerica@email.scouting.org>
To Donna Arnold

Retention Policy 3 Year Delete (3 years)

View Online

Right-click or

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 America! 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.

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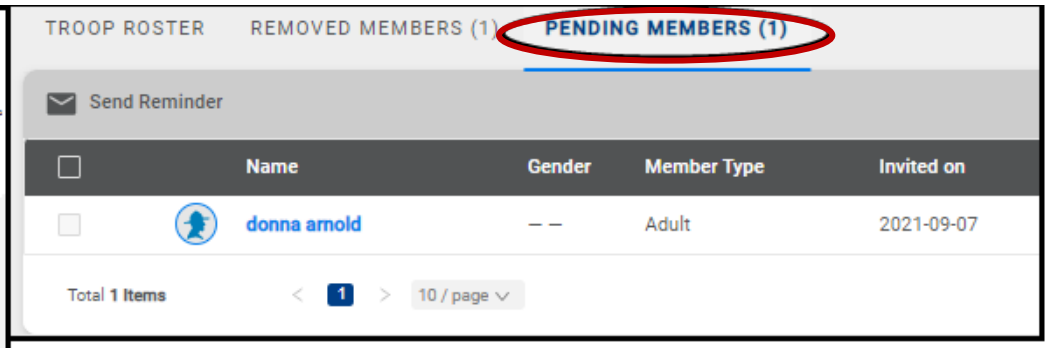


TROOP ROSTER REMOVED MEMBERS (1) PENDING MEMBERS (1)

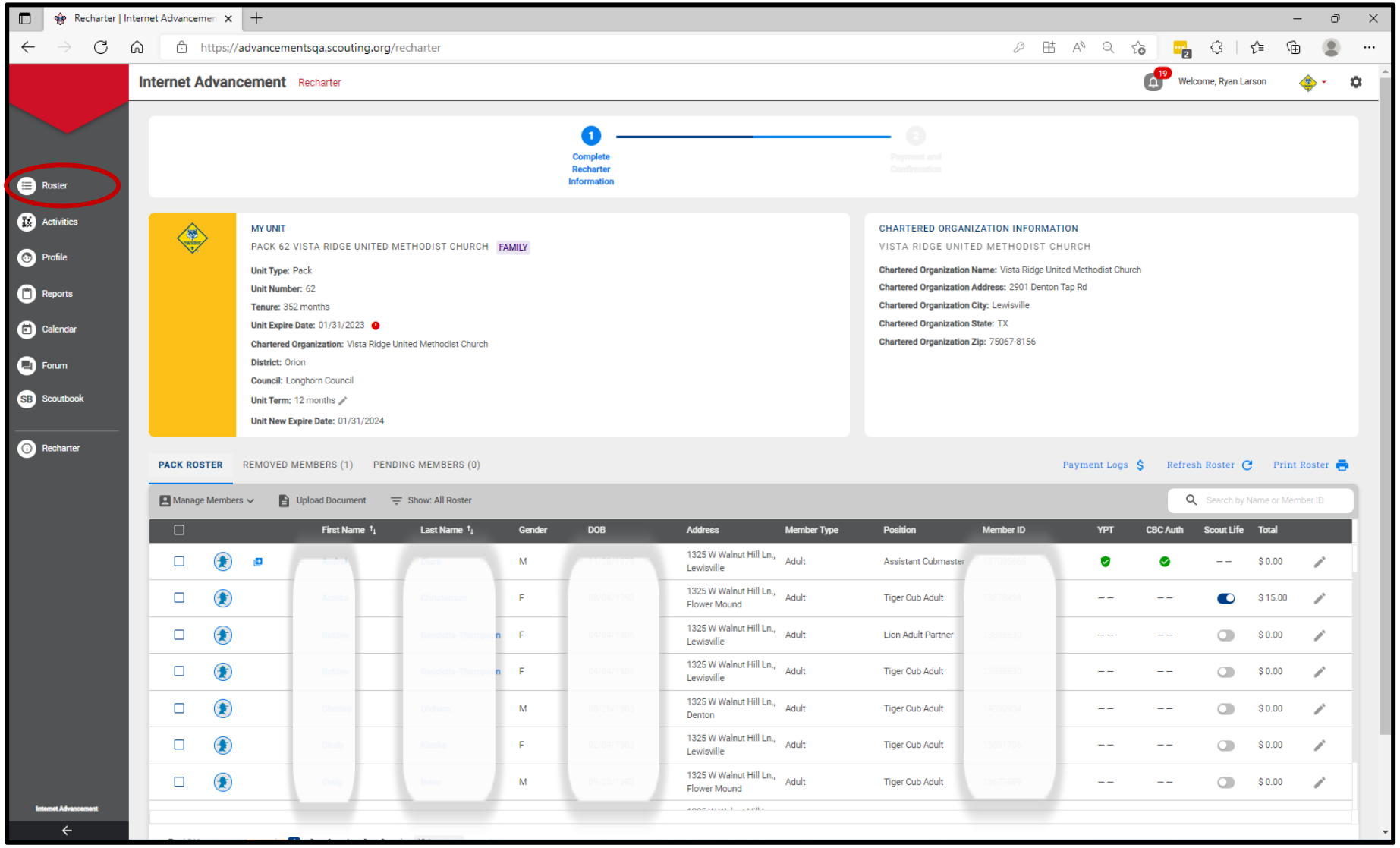
Send Reminder

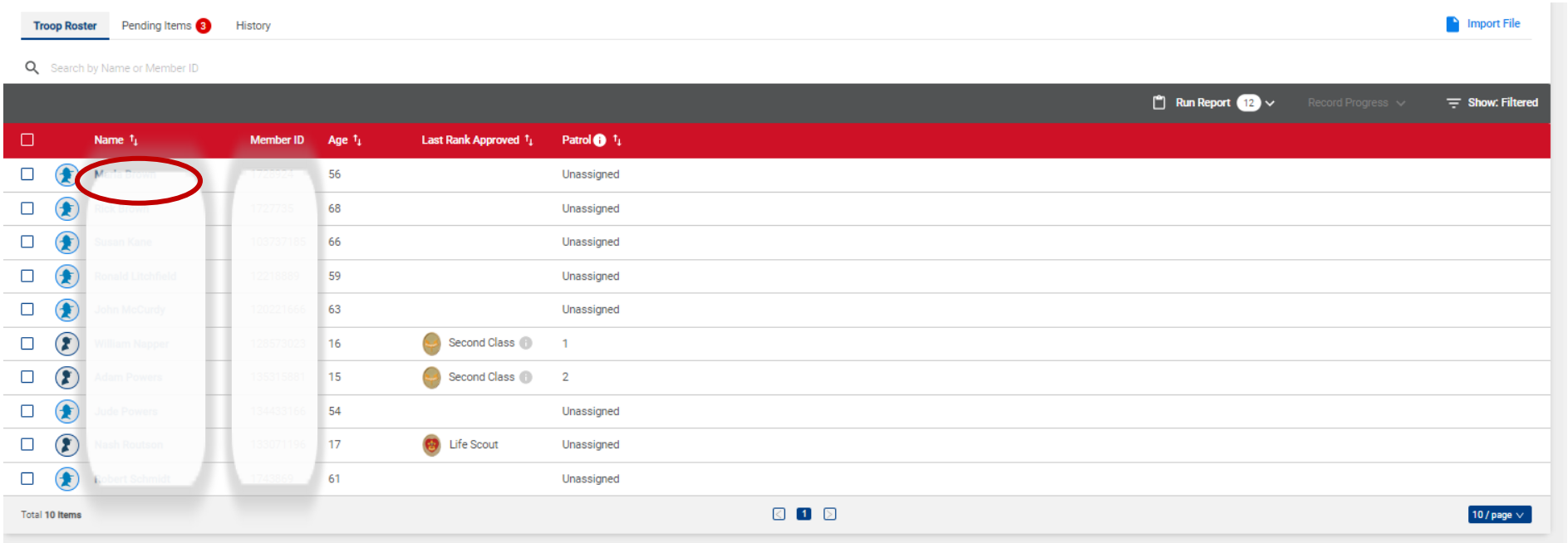
	Name	Gender	Member Type	Invited on
	donna arnold	– –	Adult	2021-09-07

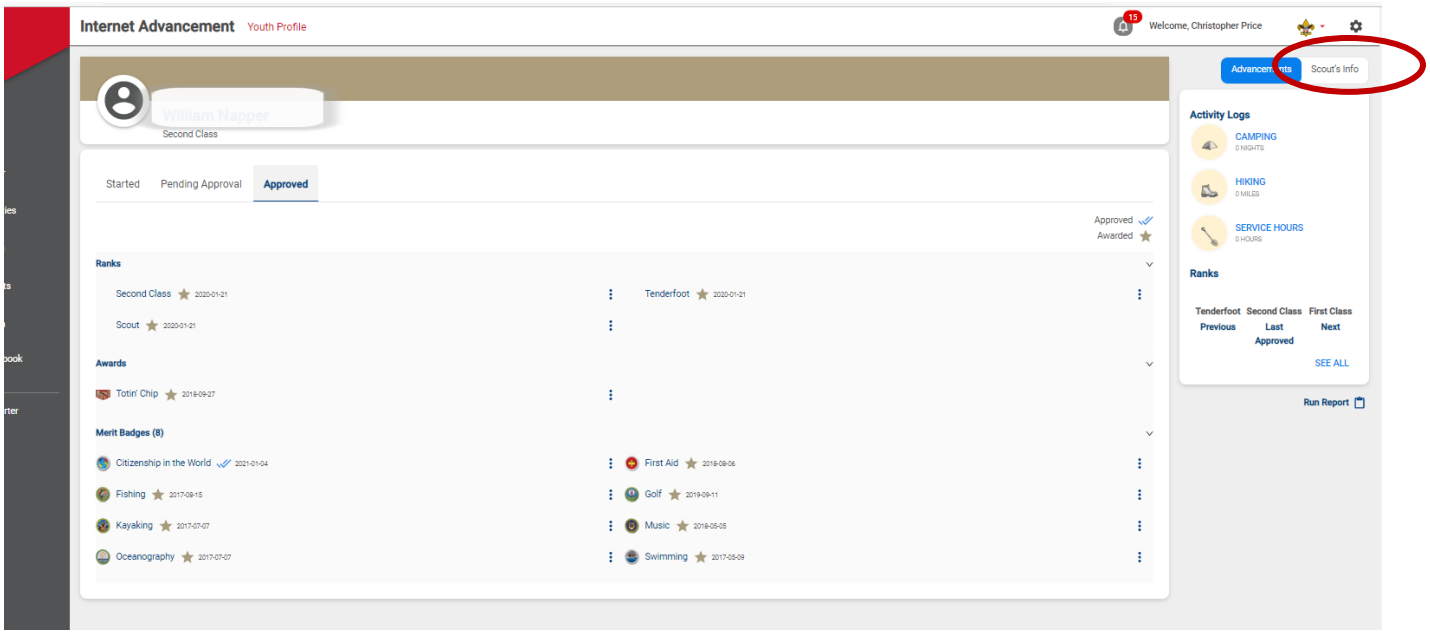
Total 1 Items 1 10 / page

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.




Troop Roster
Pending Items 3
History
Import File
Search by Name or Member ID
Run Report 12
Record Progress
Show: Filtered
Name
Member ID
Age
Last Rank Approved
Patrol
56 Unassigned
68 Unassigned
66 Unassigned
59 Unassigned
63 Unassigned
16 Second Class 1
15 Second Class 2
54 Unassigned
17 Life Scout Unassigned
61 Unassigned
Total 10 Items
1
10 / page


Internet Advancement
Youth Profile
Welcome, Christopher Price
Advancements
Scout's Info
Second Class
Started
Pending Approval
Approved
Approved
Awarded
Ranks
Second Class 2020-01-21
Tenderfoot 2020-01-21
Scout 2020-01-21
Awards
Totin' Chip 2018-09-27
Merit Badges (8)
Citizenship in the World 2021-01-04
First Aid 2019-08-06
Fishing 2017-08-15
Golf 2019-09-11
Kayaking 2017-07-07
Music 2018-05-05
Oceanography 2017-07-07
Swimming 2017-05-09
Activity Logs
CAMPING
HIKING
SERVICE HOURS
Ranks
Tenderfoot Previous
Second Class Last Approved
First Class Next
SEE ALL
Run Report

Advancements | Scout's Info

PERSONAL INFORMATION

Prefix | First Name | Last Name | Suffix

Preferred Name

Middle Name

Date of Birth: 03/05/2006

Gender: M

Please contact your council office 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

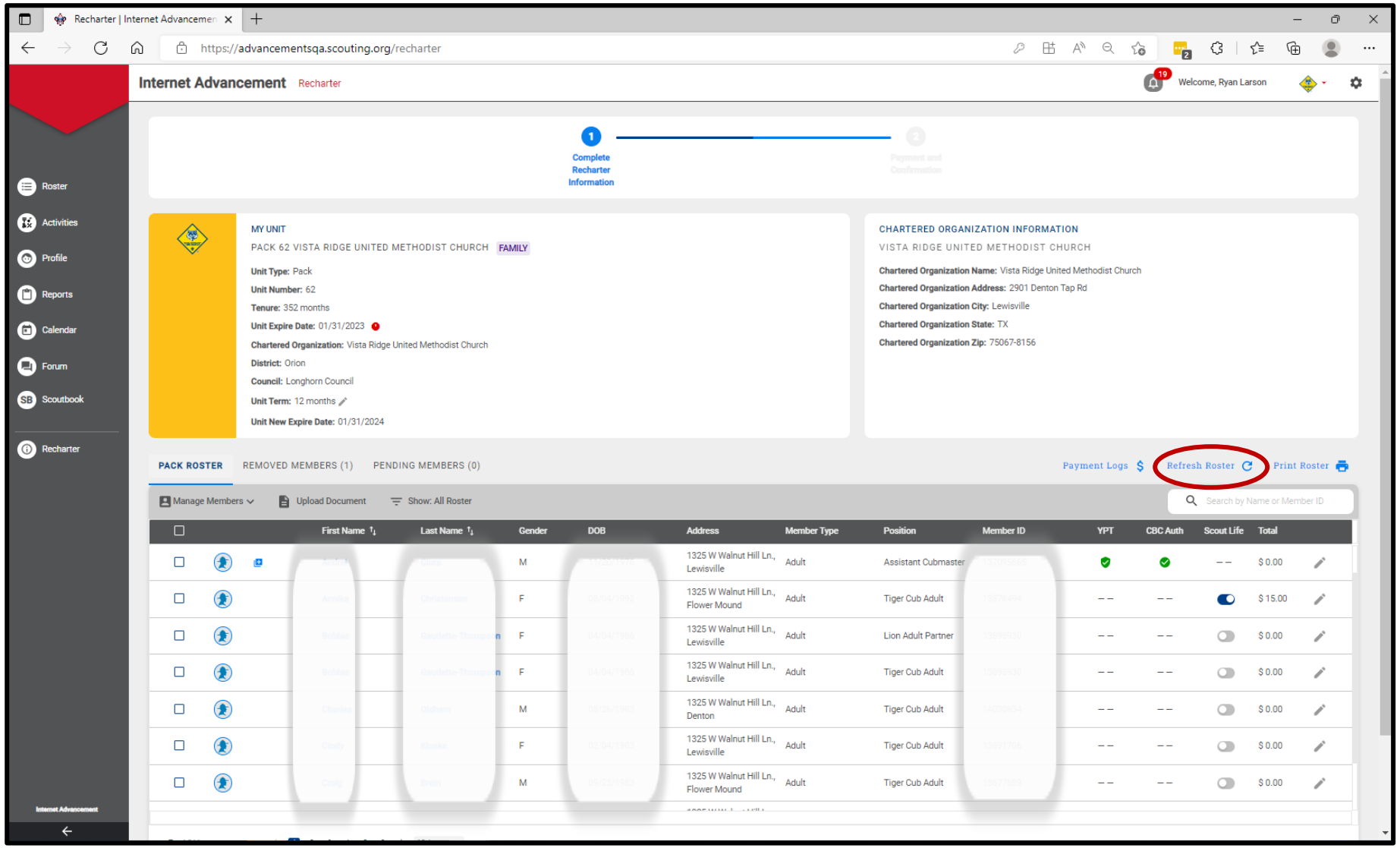
EMAIL

Primary

Email Address*: qa@scouting.org

Add Email Address

PHONE


Recharter | Internet Advancemen
https://advancementsqa.scouting.org/recharter
Internet Advancement
Recharter
Welcome, Ryan Larson
Roster
Activities
Profile
Reports
Calendar
Forum
Scoutbook
Recharter
Complete Recharter Information
MY UNIT
PACK 62 VISTA RIDGE UNITED METHODIST CHURCH
FAMILY
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VISTA RIDGE UNITED METHODIST CHURCH
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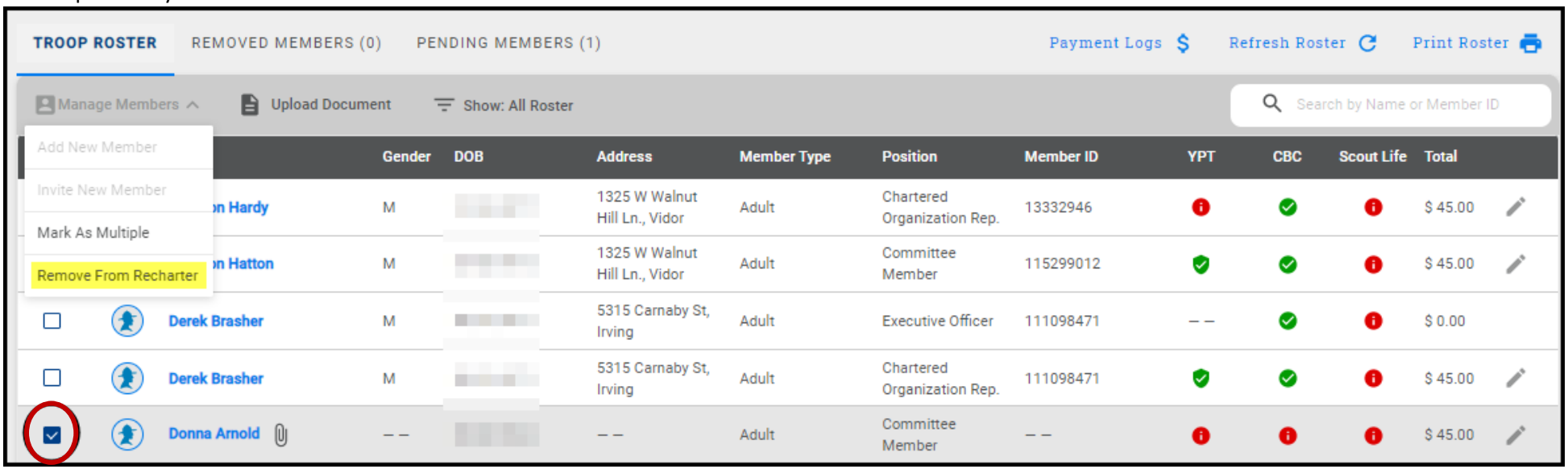
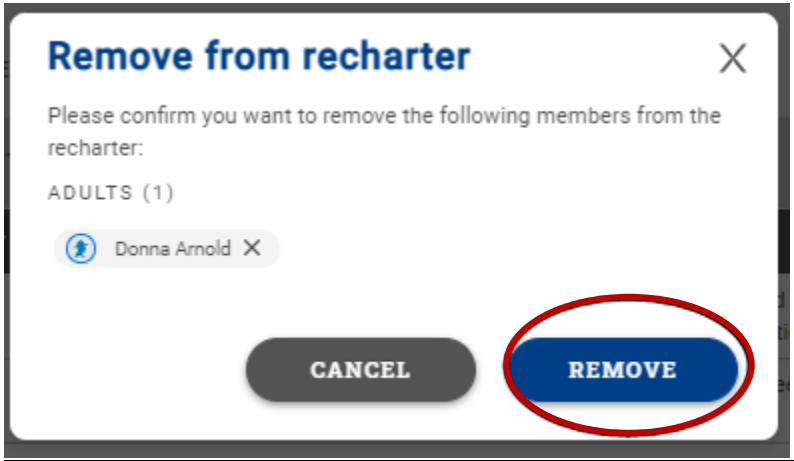
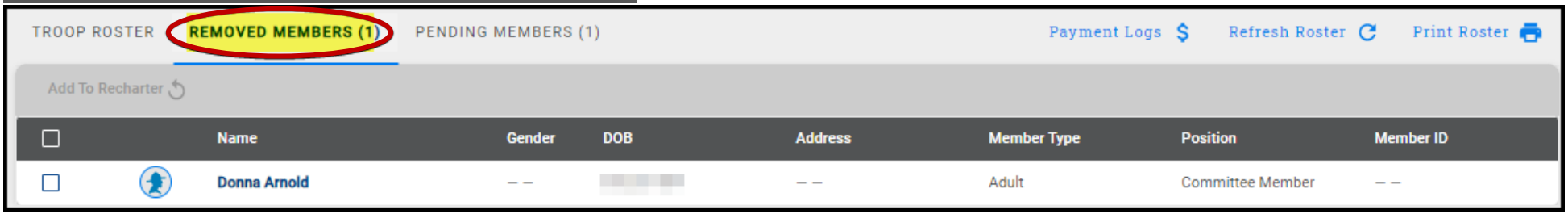
Chartered Organization State: TX
Chartered Organization Zip: 75067-8156
PACK ROSTER
REMOVED MEMBERS (1)
PENDING MEMBERS (0)
Payment Logs
Refresh Roster
Print Roster
Manage Members
Upload Document
Show: All Roster
Search by Name or Member ID
First Name
Last Name
Gender
DOB
Address
Member Type
Position
Member ID
YPT
CBC Auth
Scout Life
Total
M
1325 W Walnut Hill Ln., Lewisville
Adult
Assistant Cubmaster
$ 0.00
F
1325 W Walnut Hill Ln., Flower Mound
Adult
Tiger Cub Adult
$ 15.00
F
1325 W Walnut Hill Ln., Lewisville
Adult
Lion Adult Partner
$ 0.00
F
1325 W Walnut Hill Ln., Lewisville
Adult
Tiger Cub Adult
$ 0.00
M
1325 W Walnut Hill Ln., Denton
Adult
Tiger Cub Adult
$ 0.00
F
1325 W Walnut Hill Ln., Lewisville
Adult
Tiger Cub Adult
$ 0.00
M
1325 W Walnut Hill Ln., Flower Mound
Adult
Tiger Cub Adult
$ 0.00

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

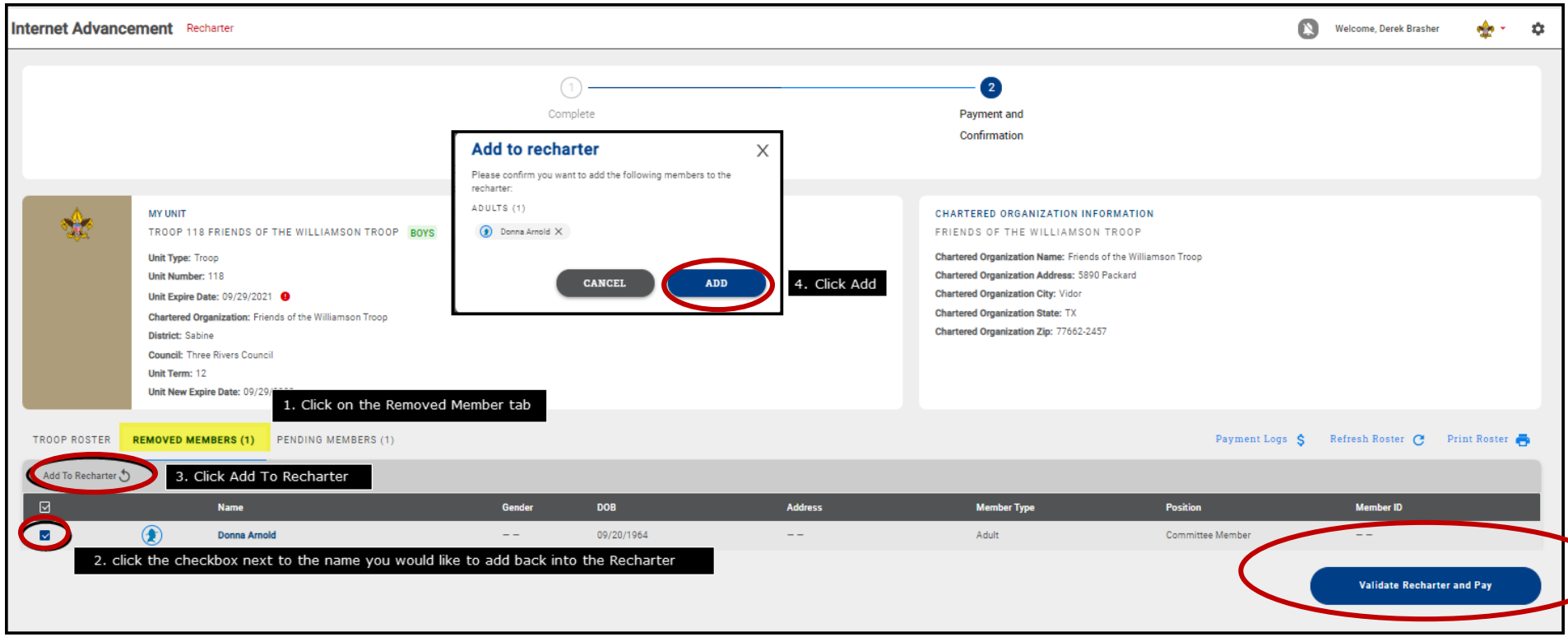
You have the ability to add someone back into the renewal after removing them by clicking on the Removed Member Tab.

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.

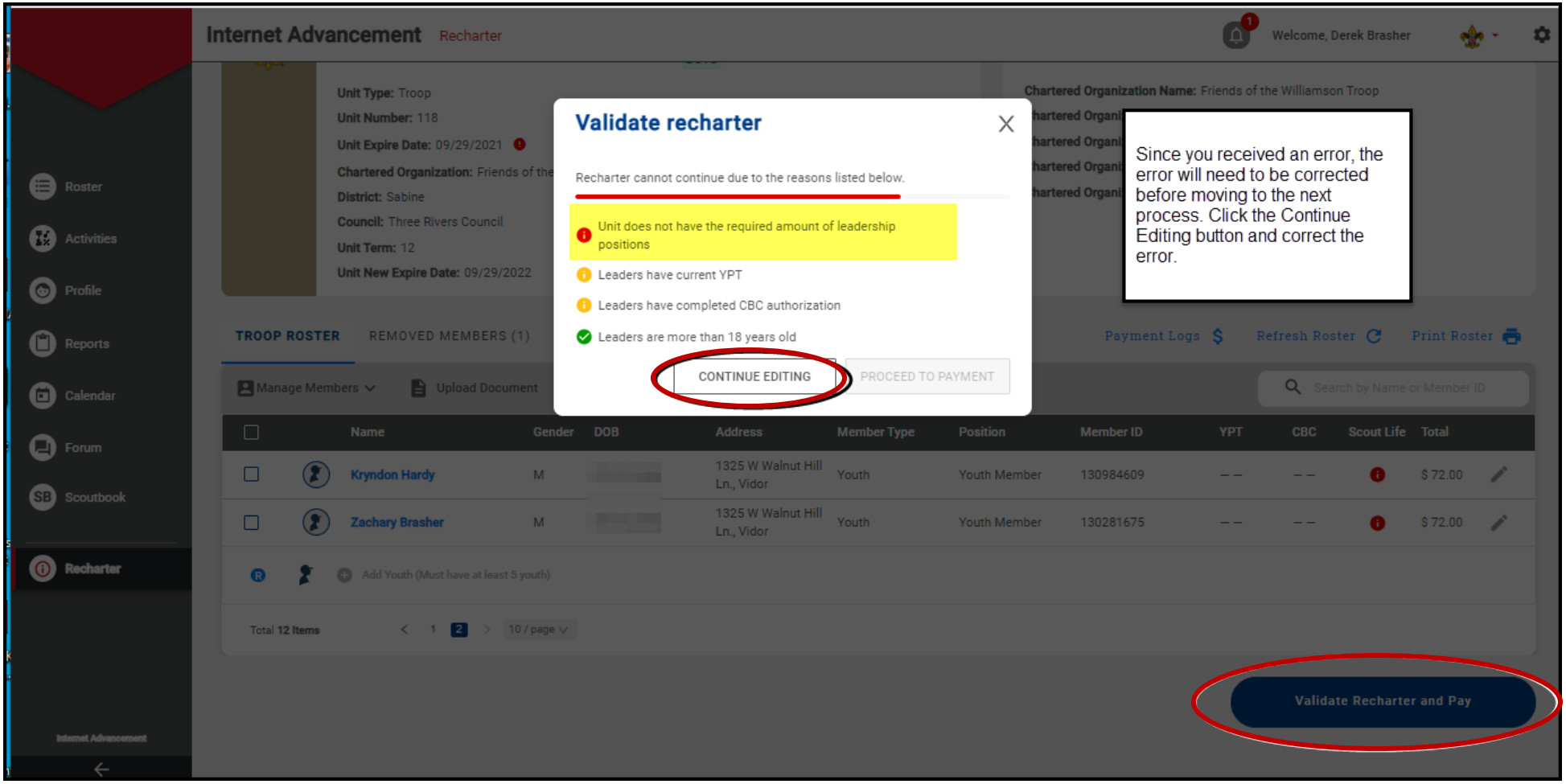
4. A pop up box will appear-click Add

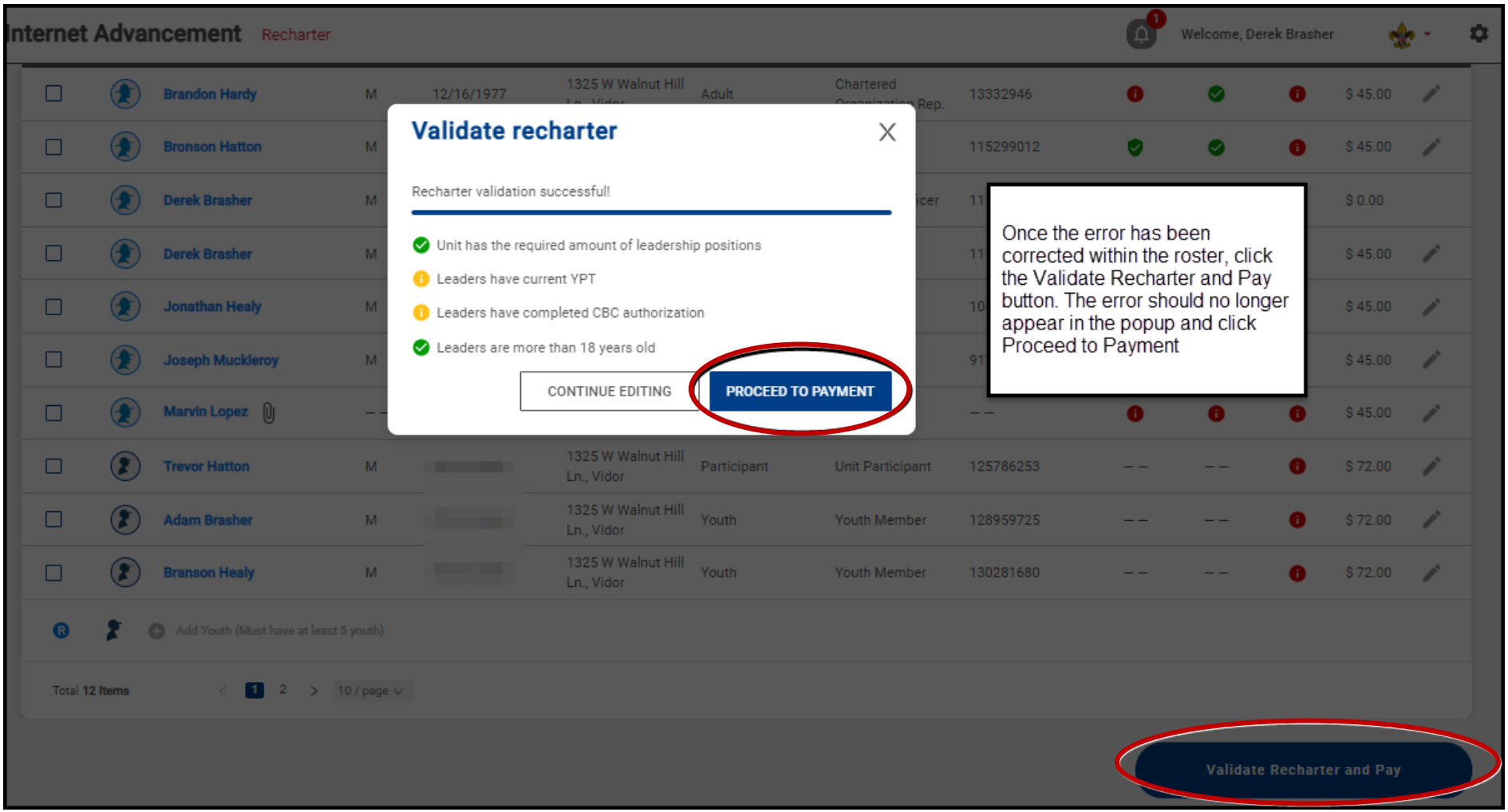


Validate Recharter and Pay

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 warning, you have the ability to correct the warnings if possible and continue through the submittal process.

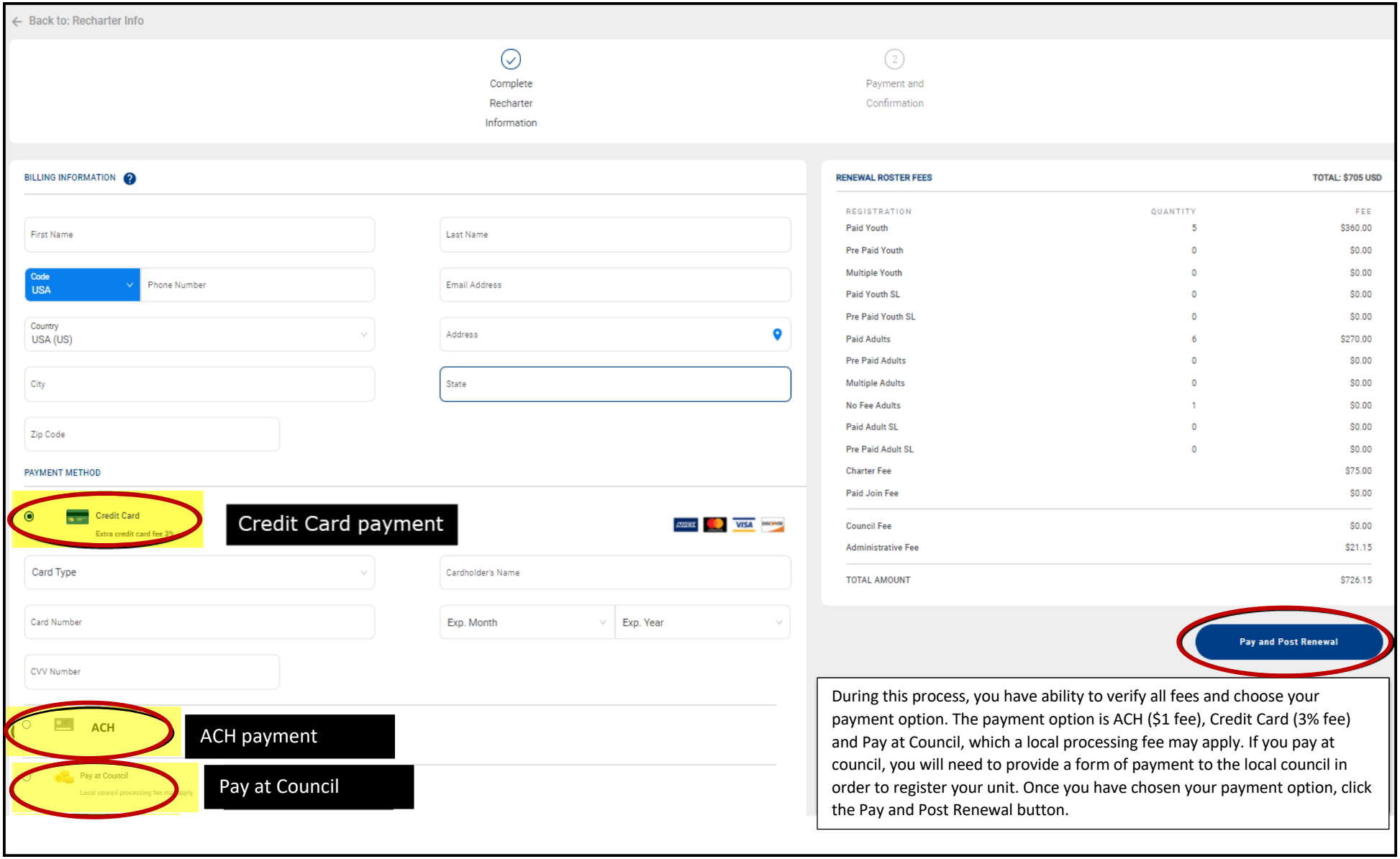
Once the error has been corrected within the roster, click the Validate Recharter and Pay button. If there are no errors and you have addressed the warnings and you are ready to submit your unit, click the Proceed to Payment button. If you have no errors or warnings and you may proceed straight to payment. 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.




Internet Advancement
Recharter
Welcome, Derek Brasher
Validate recharter
Recharter validation successful!
Unit has the required amount of leadership positions
Leaders have current YPT
Leaders have completed CBC authorization
Leaders are more than 18 years old
CONTINUE EDITING
PROCEED TO PAYMENT
Once the error has been corrected within the roster, click the Validate Recharter and Pay button. The error should no longer appear in the popup and click Proceed to Payment
Validate Recharter and Pay

Payment and Confirmation

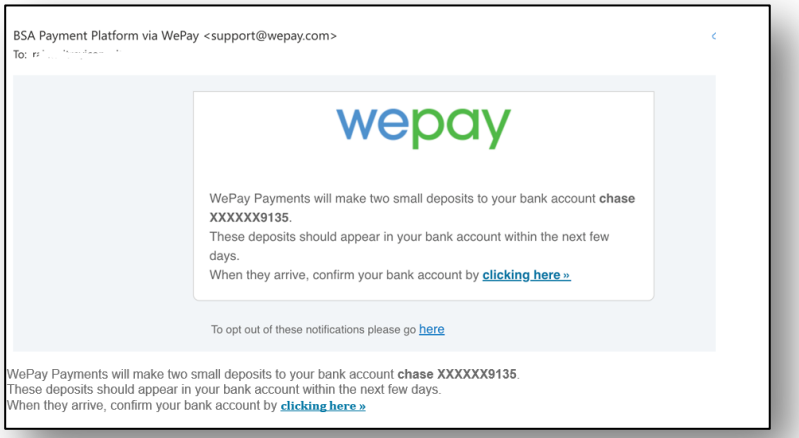
During this process you have the ability to verify all fees and choose your payment option. The payment option is ACH ($1 fee), Credit Card (3% fee) and Pay at Council. If you pay at council, you will need to provide a form of payment to the local council in order to register your unit. Once you have chosen your payment option, click the Pay and Post Renewal button.



Note on ACH

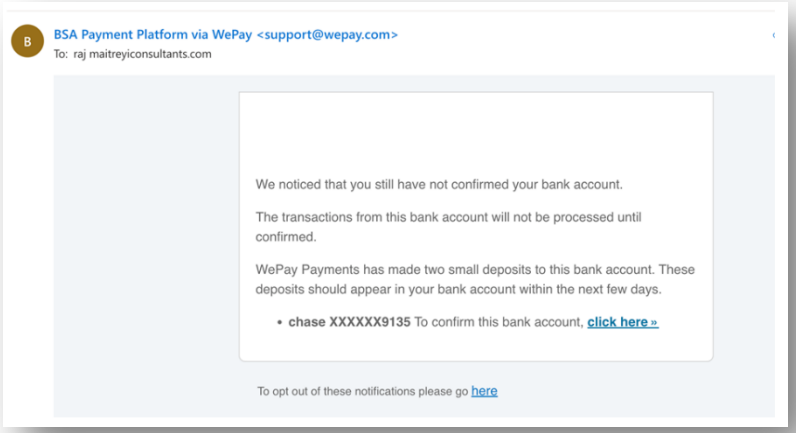
WePay, the payment processor, is the entity with whom ACH transactions occur. (BSA simply receives a confirmation or failure status for the transaction.) Your payment and charter will not be processed until your unit confirms their bank account.

To begin, you will receive an email after you select ACH and click "Pay and Post Renewal." If you did not receive an email, be sure to whitelist or add support@wepay.com to your SafeSenders list through your email provider. (Also, check the email inbox of the individual submitting the recharter as well as the key 3).



Click the tiny link at the bottom of the modal which appears and asks you to select your bank.

Once clicked, the bank routing and account number will need to be entered. Following this step, a series of microdeposits will be made to the account entered. An email will be sent from WePay to the email entered as the payor information every day for 30 days, which will ask the user to click to a form where they will need to confirm the microdeposit amounts.



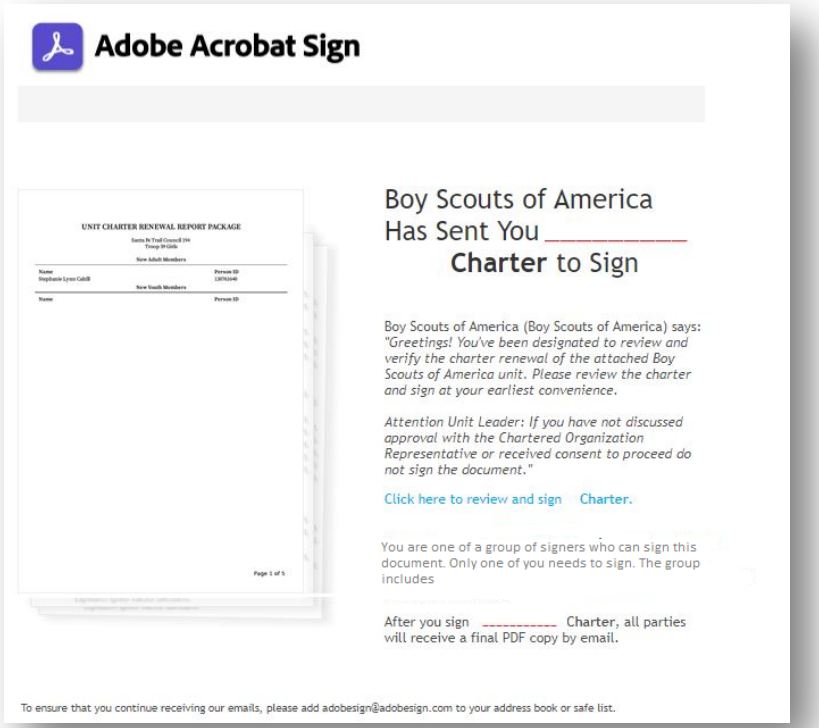
Once confirmed, the microdeposits will be reverted and the transaction amount – the full recharter amount – will be immediately withdrawn, and payment will be complete.

If payment fails, common issues include

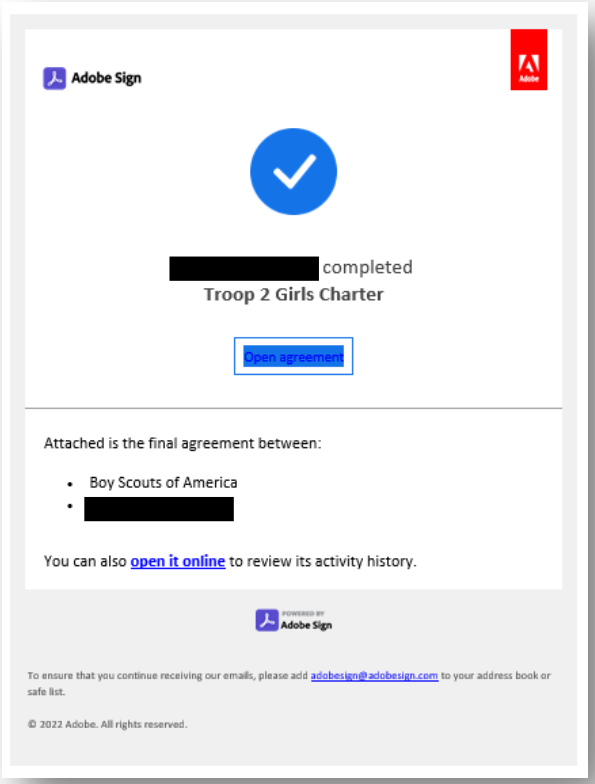
- **Bank was not confirmed within 30 days**
- **Bank refused the payment request**
- **Incorrect bank account information was provided**
- **Incorrect transaction amount entered for payment**
- **Insufficient funds in the bank account**

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