

my.Scouting
&
Scoutbook
Quick
Reference
Guide
for
Leaders

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Scouting Websites Overview

my.Scouting.org

As a Scouting volunteer, get access to your Scouting record and submit important information about your unit. Access to various tools is based on your registered Scouting position, so be sure to submit your Adult Leader Application and follow all procedures when stepping into a new role.

WHAT CAN I DO HERE?

- Update Your Contact Information
- Print your membership card
- Take Online Training Courses through eLearning
- Take Youth Protection Training
- Access Training Status Information for Yourself or Your Unit
- Access Internet Advancement
- Access Internet Rechartering
- Manage BeAScout.org Information

Scoutbook.Scouting.org

Scoutbook is a web-based youth advancement tracking tool. It is complimentary for individual and Scout unit use.

Scoutbook also provides messaging tools, photo and video sharing, and event and activity planning as well as Merit Badge Counselor information for troops. Scoutbook will not necessarily replace other unit management software your Scout unit might be using, but all units should start using Scoutbook since it is synchronized with the Scouting main membership database records.

WHAT CAN I DO HERE

- Track Individual Scout Advancement
- Track Advancement for Multiple Scouts
- Plan Activities and Events and Send Group Messages

Advancements.Scouting.org

Internet Advancement is managed through my.Scouting.org and Scoutbook. Units can use Internet Advancement to record their Scout advancement online. This method is both easy and accurate for adding ranks, merit badges, and awards.

Advancements.Scouting.org - Recharter

Internet Rechartering is the online system for annual membership renewal of your unit. It is available prior to your charter expiration and for 60 days after expiration.

WHAT CAN I DO HERE?

- Access Internet Rechartering

My.Scouting Roles

Key 3 Roles

Only the Key 3 can respond to online applications, printing rosters, assigning a Unit Advancement Chair, changing adult positions, assigning a delegate on their behalf, etc.

(Key 3 includes the Chartered Org Rep, Cubmaster/Scoutmaster, and Committee Chair.)

Chartered Organization Rep (COR) Role – In regard to applications:

- Only the COR can accept adult applications.
- Adults do not apply for specific positions.
- The COR assigns a unit position to the adult leader when he/she accepts the application.

Key 3 Delegates

Delegates can be assigned to act on behalf of the Key 3. Only the Chartered Org Rep can assign a delegate for their position.

COR Delegate – In regard to applications:

- Can accept adult or youth apps.
- Receives no other powers.
- Responds to inquiries.

Key 3 Delegate – In regard to applications:

- Can accept youth apps ONLY.
- Can respond to inquiries.
- Can make registration inquiries.

Applications – General Notes

Notifications are sent via email on Mondays & Thursdays to the Unit Key 3 or Delegates. View pending applications by logging into my.Scouting>click Menu>click Unit>click Member Manager. When an application comes in:

1. Send a welcome email.
2. Immediately, follow-up with a text saying thank you for your interest.
3. Follow that with a phone call introducing yourself and the unit.

In my.Scouting Application Manager:

- Post updates in the LEAD NOTES section.
- This helps keeps the district/council informed.
- Helps coordinate within the unit Key 3 and Delegates.

Applications Will Time out!

- On Day 1, once a new Scout applies, the unit receives a notification.
- On Day 6, if no action is taken, the application is reassigned to the district or council level and the unit can no longer take any action.
- On Day 14, the application is closed.

The screenshot displays the 'my.Scouting | Membership Manager' interface for 'Pack 0463 First United Methodist Church - Pearland'. The left sidebar contains a navigation menu with 'Membership Manager' selected, and links for 'Application', 'Invitation', and 'Reports'. The main content area is divided into two columns. The left column, titled 'Lead Information', contains a placeholder for a photo, followed by fields for 'Heard About: Open House/School', 'Date Submitted: 08-30-2021', 'Youth Information' (with a redacted name), 'Age: 5', 'Grade: Kindergarten / Grade Prior to the First Grade', 'Contacted Organization: Pack 0463', and 'Currently Assigned to Organization: Pack 0463'. Below these are buttons for 'Respond to Lead' and 'Email Assigned Organization', and a comment field. The right column, titled 'Lead Notes', shows a list of status updates: 'Status updated to Pending Reassignment.' (Sun, Sep 5, 2021 1:07 AM), 'Talked to parent. Sent link for registration.' (Wed, Sep 8, 2021 8:04 PM, William Clarke), 'Status updated to Opened' (Wed, Sep 8, 2021 8:55 PM, William Clarke), 'Status updated to Opened' (Mon, Aug 30, 2021 6:18 PM, William Clarke), and 'Emailed and texted parent.' (Mon, Aug 30, 2021 6:37 PM, William Clarke). A 'POST' button is at the bottom of the notes section. At the very bottom of the interface are four buttons: 'Reassign', 'Close Lead', 'Complete', and 'Send Application'.

Invitation Manger is your leads resource tool. This is where any inquiries from BeAScout will come in and await your response. You can also add leads manually during joining events or from names provided by unit members and send invitations to join that include a link to your unit’s application. There is also a URL and QR code specific to your unit that can be downloaded from this tool to use in your unit’s recruitment efforts.

View your pending leads, and after communicating with the parent who wants to join your unit, click on “Send Application” and it will send the parent a link to sign up to the e-mail they provided. Complete the steps to accept a new lead or CLOSE the lead. Before closing a lead, if the Scout/Adult is not joining after all, suggest other units in the area if yours does not work for them.


Applications - How to Take Action for Youth

- *Notifications are sent via email on Tuesdays & Fridays when a new application is pending unit approval.*
- *Only Key 3 (Chartered Org Rep, Cubmaster/Scoutmaster, and Committee Chair) or Key 3 Delegates may approve youth apps.*
- You may download the application for contact information, but you **MUST DO THIS BEFORE** accepting the youth applicant.
- If you forget to download the application, you can run reports on completed applications.

my.Scouting | Membership Manager

Welcome, William C

Troop 0464 First United Methodist Church - Pearland



Troop 0464

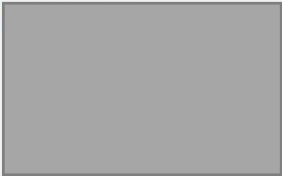
Membership Manager

Application

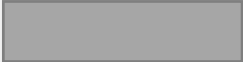
Invitation

Reports

Application Summary



Membership Term: Sep 1, 2021 - Jan 31, 2022



Applied to Organization: Troop 0464 B

Currently Assigned to Organization: Troop 0464


Assigned Position: Youth Member


APPLICATION ID: 200358451 [VIEW INVOICE](#)


Application Notes

Type your note... [POST](#)


Review Application Pending Acceptance

1 Youth Information COMPLETED 

2 Guardian Information COMPLETED 

3 Payment/Checkout COMPLETED 

[DOWNLOAD APPLICATION](#)



[ACCEPT](#) [REASSIGN](#) [DO NOT ACCEPT](#)

Applications - How to Take Action for Adults

- *Only the Chartered Org Rep (COR) or their Delegate may approve adult apps. Only the COR can designate their delegate. (Go to my.Scouting>click Unit>click Position manager>click Functional roles.)*
- YPT required to accept.
- USR – Good starting place.
- Doesn't need additional training.
- Recharter training deadline.
- Can find their fit in the unit.
- Easy to reassign in my.Scouting.
- May need to “acknowledge” disclosures prior to accepting.

Application Summary

Current Status: Pending Acceptance
YPT Status: Never Taken

Gender : Male
Date of Birth: [redacted]
Membership Term: Aug 1, 2021 - Jan 31, 2022

Applied to Organization: Pack 0452
Currently Assigned to Organization: Pack 0452

APPLICATION ID: 200328275 [VIEW INVOICE](#)

Application Notes

the YPT training.
Wed, Aug 25, 2021 9:39 AM
Albert Cipolla

ACKNOWLEDGEMENT NOTE
Status updated to Pending Reassignment.
Thu, Sep 2, 2021 2:01 AM

Per Mike, has not been able to take YPT, as of Aug 30
Thu, Sep 2, 2021 9:57 AM
Valdemar Tamez

Status updated to Pending Acceptance
Thu, Sep 9, 2021 10:58 AM
William Clarke

Type your note... [POST](#)

Review Application Pending Acceptance

1 Basic Information COMPLETED

2 Background Information COMPLETED

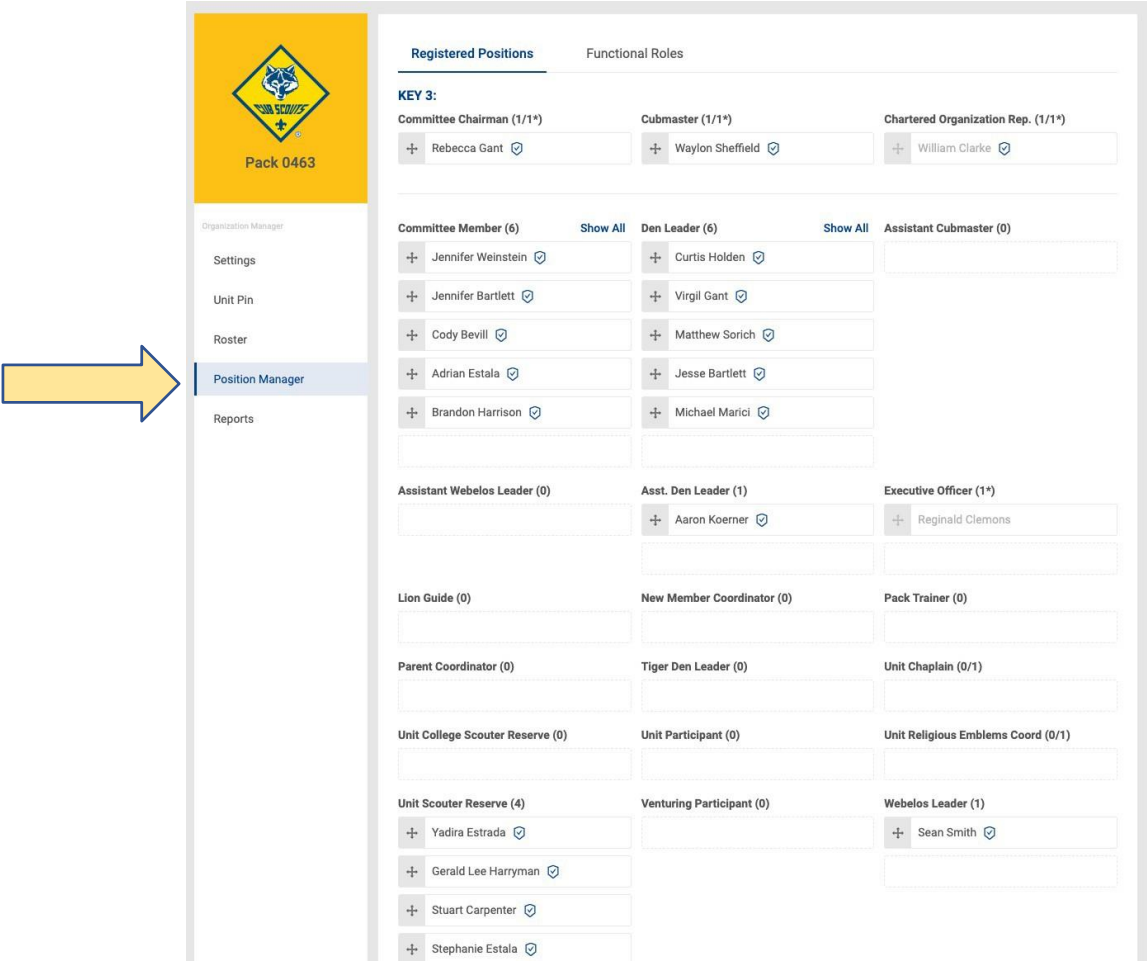
3 Payment/Checkout COMPLETED

ADDITIONAL INFORMATION [DOWNLOAD APPLICATION](#)

PLEASE NOTE: On adult applications, if the applicant answered “Yes” to any of the screening questions, when you click on “Review Background Responses,” you will then see a popup. You will need to acknowledge that you have read the explanations given for each of the screening questions to which they affirmatively clicking the checks next to each question. You will also be asked to type in the comments that you have discussed these questions with the applicant. After you type your comments, the “I Acknowledge” button will become active, and you may submit your comment.

Changing Adult Positions/Adult Functional Roles

- The Chartered organization Representative can do this.
 - Log into my.Scouting. Click Unit under Menu>click Position Manager.
 - Drag and Drop changes.
 - Takes effect overnight.
 - Or a Key 3 can assign functional roles to adult volunteers.
- Read about Functional Roles tab below.*



Registered Positions Functional Roles

KEY 3:

Committee Chairman (1/1*)	Cubmaster (1/1*)	Chartered Organization Rep. (1/1*)
+ Rebecca Gant	+ Waylon Sheffield	+ William Clarke

Committee Member (6)	Den Leader (6)	Assistant Cubmaster (0)
+ Jennifer Weinstein	+ Curtis Holden	
+ Jennifer Bartlett	+ Virgil Gant	
+ Cody Bevil	+ Matthew Sorich	
+ Adrian Estala	+ Jesse Bartlett	
+ Brandon Harrison	+ Michael Marici	

Assistant Webelos Leader (0)	Asst. Den Leader (1)	Executive Officer (1*)
	+ Aaron Koerner	+ Reginald Clemons

Lion Guide (0)	New Member Coordinator (0)	Pack Trainer (0)

Parent Coordinator (0)	Tiger Den Leader (0)	Unit Chaplain (0/1)

Unit College Scouter Reserve (0)	Unit Participant (0)	Unit Religious Emblems Coord (0/1)

Unit Scouter Reserve (4)	Venturing Participant (0)	Webelos Leader (1)
+ Yadira Estrada		+ Sean Smith
+ Gerald Lee Harryman		
+ Stuart Carpenter		
+ Stephanie Estala		

A **Registered Position** is a role you volunteer for which requires the payment of a registration fee. Examples of Registered Positions include Committee Chairman, Chartered Organization Representative, Scoutmaster, Assistant Scoutmaster, Committee Member, New Member Coordinator, Unit Chaplain, Unit College Scouter Reserve, Unit Participant, and Unit Religious Emblems Coordinator.

The **Functional Role Tab** is a specific assignment to a volunteer in a registered position that does not require the registered volunteer to pay an additional registration fee. Examples of Functional Roles include Chartered Organization Representative Delegate, Key 3 Delegate, Registration Inquiry (Gives an adult access to new and current leads), Unit Advancement Chair (Gives an adult access to Scoutbook purchasing and processing), Unit Training Chair (Gives an adult access to Trained leader reports), and Youth Protection Champion.

PLEASE NOTE: Functional roles do not meet the current Youth Protection Guidelines. “All adults staying overnight in connection with a Scouting activity must be currently registered in an adult fee-required position as listed or as an adult program participant.

A Merit Badge Counselor does not meet this requirement.”

Transfers – Unit How-To

- Must be done by one of the Key 3.
- Click Unit >Roster.
- Choose Scout. Click Transfer icon on top gray bar.
- Can Bulk Transfer.

my.Scouting | Organization Manager

Pack 0463 First United Methodist Church - Pearland

Pack 0463

Organization Manager

Settings

Unit Pin

Roster

Position Manager

Reports

Pack 0463 First United Methodist Church - Pearland

SELECT ORG LEVEL

Roster

Search

Transfer Compose Print Edit Profile Export Roster Filter

Name	Member ID	Role	Gender
		Youth Member	M
		Committee Member	F
		Den Leader	M
		Youth Member	M
		Youth Member	M
		Youth Member	M
		Committee Member	M
		Youth Member	M
		Youth Member	M
		Unit Scouter Reserve Tiger Cub Adult	M

< 1 2 3 4 5 6 7 >

- DOWNLOAD THE COMPLETE IN-COUNCIL TRANSFER INSTRUCTIONS [HERE](#).
- DOWNLOAD THE COUNCIL-TO-COUNCIL TRANSFER INSTRUCTIONS [HERE](#).

Known Issues:

- If training or advancement records are not syncing or pulling over, contact your local council.
- IF IN SCOUTING BEFORE, DO NOT CREATE A NEW ACCOUNT. Follow prompts for creating an account, but the website should find a previous record, and registrant must choose “USE BSA CREDENTIALS.”
- If a person is still listed in their old council, they need to update their COUNCIL FIELD under their PROFILE.

Transfers – Parents How-To

- Parent may also transfer the Scout.
- Log into my.Scouting>click Menu>click My Application.
- Choose child>click Transfer.

The screenshot shows the my.Scouting web application. On the left, a sidebar menu is visible with the 'My Application' item highlighted by a yellow arrow. The main content area is titled 'TRANSFER / MULTIPLE / RENEW APPLICATIONS' and displays a list of applications for three individuals: William Clarke, Wesley Clarke, and Madeleine Clarke. Each application entry includes a 'Multiple' button and a 'Renew' button. A yellow arrow points to the 'Transfer' button for Madeleine Clarke.

TRANSFER / MULTIPLE / RENEW APPLICATIONS		
Personal Information		
William Clarke Member ID: 12694374 Troop 4640 First United Methodist Church - Pearland	Multiple	Renew
William Clarke Member ID: 12694374 Pack 0463 First United Methodist Church - Pearland	Multiple	Renew
William Clarke Member ID: 12694374 Crew 0464 First United Methodist Church - Pearland	Multiple	Renew
William Clarke Member ID: 12694374 Troop 0464 First United Methodist Church - Pearland	Multiple	Renew
Wesley Clarke Member ID: 134645970 Troop 0464 First United Methodist Church - Pearland	Transfer	Renew
Madeleine Clarke Member ID: 12811174 Troop 4640 First United Methodist Church - Pearland	Transfer	Multiple

(See PDF Downloads on previous pages for a step-by-step guide.)

Running Reports

- Must be done by key 3 or Delegates, Or Unit Training Chair.
- Log into my.Scouting>click on Unit>click on Reports.
- Great for finding Applications & Invitations.

my.Scouting | Membership Manager

Welcome

Pack 0463 First United Methodist Church - Pearland

SA SCOUTS

Pack 0463

Membership Manager

Application

Invitation

Reports

Last updated at: 09/09/2021 10:32:00 AM

RELOAD

14

Total Applications

Last 90 days

0

Application in Progress

Last 90 days

0

Total Closed Applications

Last 90 days

14

Total Completed Applications

Last 90 days

Pending Summary

0

Pending Acceptance

VIEW

0

Pending Acknowledgement

VIEW

0

Pending Applicant Agreement

VIEW

0

Pending Applicant Response

VIEW

0

Pending Payment

VIEW

0

Pending Reassignment

VIEW

0

Pending Refund

VIEW

0

Pending Review

VIEW

Alerts

Completed

0 - 14 Days since submitted

15 - 25 Days since submitted

26 - 60 Days since submitted

0

Completed

>

CLOSED LEADS REPORT

This report group lists applications that were not completed and are now closed. No further action is expected regarding closed applications.

Run

COMPLETED APPLICATIONS

The Completed Applications report is a list of membership applications that have been completely processed and resulted in a BSA membership for the designated term.

Run

FAMILY SCOUTING

The Family Scouting Report lists all units that are eligible for Family Scouting and displays which are boys only, girls only, boys and girls.

Run

INITIATED APPLICATIONS REPORT

The Initiated Applications report displays applications that have been created, but not yet submitted and are in an Initiated status.

Run

LEADS IN PROGRESS

The Leads Report displays information about all leads submitted.

Run

MEMBERSHIP TOTALS REPORT

The Membership Totals Report returns a detail list of each active unit within the structure of the district or council. By unit, the reports give you demographic data such as the number of youth and adults, male and female along with the chartered organization and charter expiration date.

Run

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How To Update Your www.BeAScout.org Info

Go to:

- My Scouting >Unit >Organization Manager
- Click Unit Pin.
- Update the following:
 - Important Info
 - Leader name, email, phone
 - Meeting location
 - Meeting date/time
 - Inviting info about your unit

Menu

Menu

My Training

My Profile

Manage Member ID

My Account

My Application

My Recent Tools

BSA Web Links

Crew 0464 - Northern Star 03

Application Manager

Invitation Manager

Organization Manager

Roster

Trained Leader Report

Training Manager

YPT Reports

my.Scouting

Empowering you to deliver the Scouting program.

g for Volunteers

of Diversity, Equity and Inclusion! Learn how to support diverse youth, to a sense of belonging, and to build communities where every person feels

to the fall Scouting season. We need to make sure that your unit's info is up-to-date your Unit Pin and receive 30% off online at the ScoutShop.org! Hurry, this trictions apply.

even between Council using the My.Scouting tools and Online Registration. as been fixed so units can make transfers now too.

your photo to your online profile in My.Scouting?

my.Scouting | Organization Manager

Pack 0463 First United Methodist Church - Pearland

Pack 0463

Organization Manager

Settings

Unit Pin

Roster

Position Manager

Reports

Unit Information

Pin Mode

Only Allow the Council to Update Pin Information

Allow Units to Update Pin Information

Appear on BeAScout:

Allow People to Apply Online:

Contact Information

Contact Person: Waylon Sheffield

Phone: (281) 381-0803

Eme

Unit Website

http://pearlandpack463.com/

Additional Unit Information

We are currently accepting both boys and girls from grades K-5. Our pack meetings are usually the 4th Thursday of the month. Pack 463 was the original Cub Scout Pack founded in Pearland and is celebrating its 75th anniversary in 2021.

Unit Pin Preview

Pack 0463 First United Methodist Church - Pearland

Contact: Waylon Sheffield

Phone: (281)

Email: waylon

Website: http

Dens for Boys or Girls

Online Registration available for this unit.

We are currently accepting both boys and girls from grades K-5. Our pack meetings are usually the 4th Thursday of the month. Pack 463 was the original Cub Scout Pack founded in Pearland and is celebrating its 75th anniversary in 2021.

Request More Information

Apply Now

Fields to Display on Unit Pin:

Unit Meeting Address:

Contact Person's Name:

Phone Number:

Contact Email:

Unit Website:

Additional Unit Information:


Unit Meeting Address

Address

2314 N Grand Blvd

Pearland, TX 77581

Edit



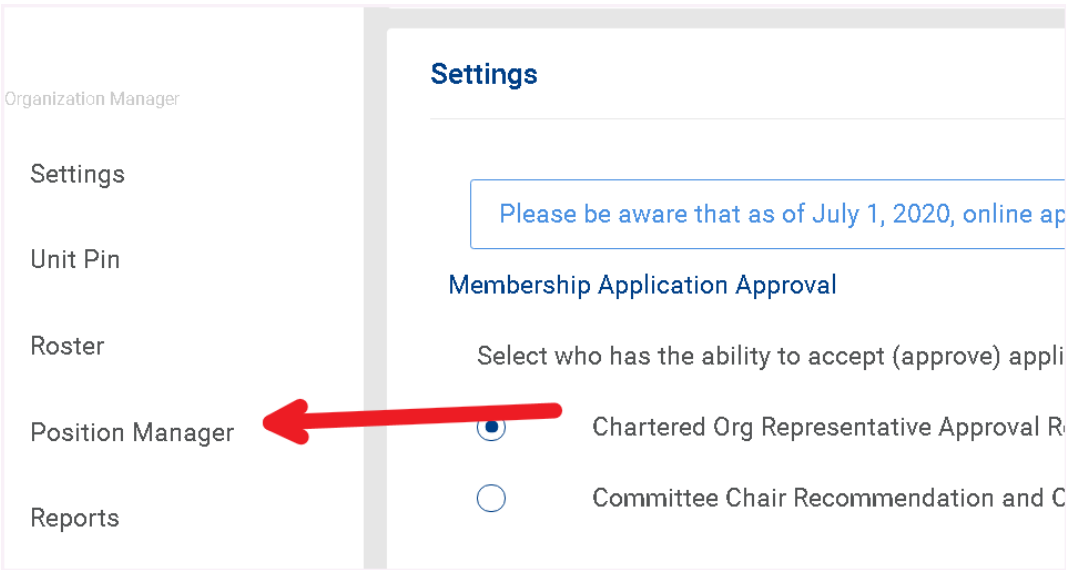
13

Internet Advancements

Unit Key 3s and their delegates always have access to Internet Advancement. The unit can also designate any new adult as the Unit Advancement Chair.

Assigning Advancement Chairs

A unit Key 3 logs into my.Scouting.org and clicks on the menu in the upper left, then their unit, and the Organization Manager and then Position Manager on the left:



The roles that can access Internet Advancement are Key 3 Delegate or Advancement Chair.

Internet Advancement writes to the Scoutbook database so anything approved will instantly show up in Scoutbook (and vice versa.) Also, all records are sync'd with the council records automatically within 48 hours.

Who Can Use Internet Advancement?	
Role	Access
Unit Leader	Full Access
Unit Key 3 Member	Full Access
Unit Key 3 Delegate	Full Access
Unit Advancement Chair	Full Access
Parent	Record completed activities for children
Youth	Record your own activities
Assistant Scout Master	Record completed activities
Den Leader	Record completed activities
Scoutbook Roles	
Crew Admin	Record completed activities
Pack Admin	Record completed activities
Ship Admin	Record completed activities
Patrol Admin	Record completed activities
Den Admin	Record completed activities
Unit Activity Chair	Record completed activities

Scoutbook – Help Using Scoutbook

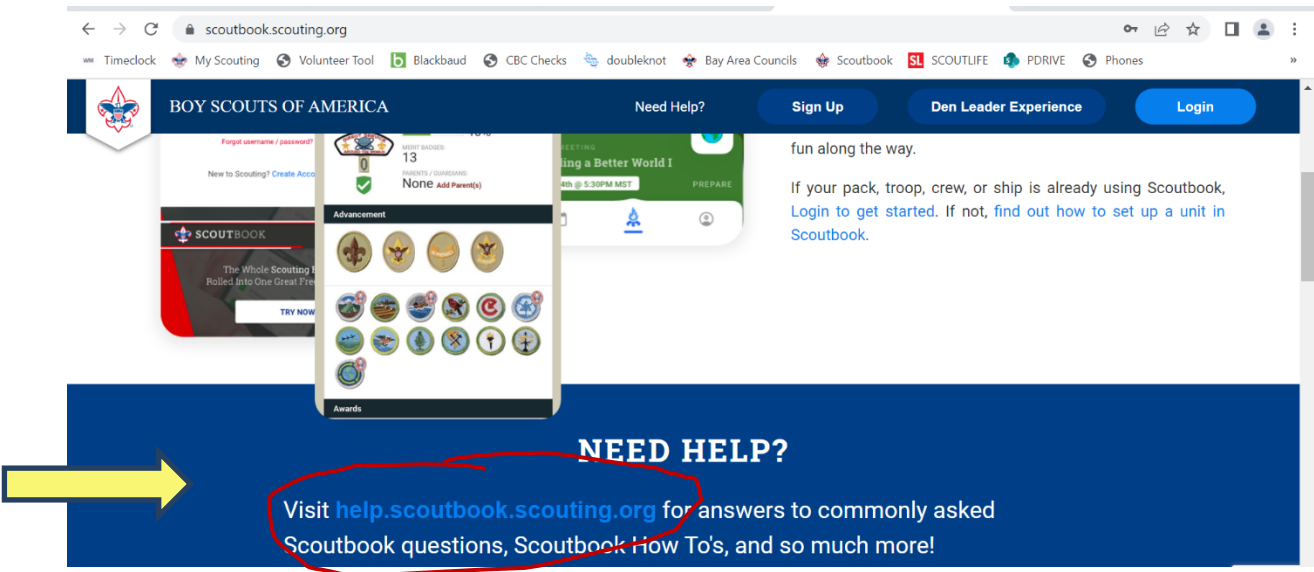
Use the help guide to find answers to questions such as:

- “How to add Den leaders.”
- “How to assign Scouts to a Den.”

The help section can be found on the website, www.Scoutbook.scouting.org BEFORE you log in. Scroll down the page or visit the help site directly at www.help.scoutbook.scouting.org.

Getting help with Scoutbook is as easy as 1, 2, 3:

1. Visit the [Scoutbook Knowledge Base](#).
2. Visit the [Scoutbook discussion forum](#).
3. Contact support by [submitting a request](#).



Den Leaders in Scoutbook

Visit the Den Leader Portal to get started as a new or returning Den leader.
<https://leader.scouting.org/dashboard/>

More helpful searches:

Contents
How to Login for Unit Volunteers
Creating Dens / Patrols and Assigning Scouts
Setting up Adult Roles in Your Unit in Scoutbook
Setting up Parents / Guardians
Setting up Scouts

Scoutbook FAQs

Help! A Scout is Not Showing on Our Unit Roster!

A new Scout should appear on your roster in Scoutbook within approximately 48 hours after they appear on your roster in Member Manager in my.Scouting.org. We strongly advise that you wait for this automatic process to occur. This will avoid issues in the future.

How do I find a list of Merit badge Counselors or add one to our roster?

Only unit leaders can find the list of merit badge counselors on the unit page. Unit leaders can also obtain a report of which leaders in your unit are merit badge counselors, and what badges they counsel.

To have a Merit Badge Counselor added, please contact the council.

Merit Badge Counselors can see their position by logging into Scoutbook, click on My Dashboard >>My Positions. They will not show as having the position on the troop roster because it is a council position, not a troop position.

Rosters

To pull a roster with the Scouts Date of Birth, the Key 3 or Delegates must use Scoutbook.

Use Report Builder to create a report with full DOB. Another option is that unit Admins can Export / Backup the Scouts csv file, and DOB is one of the data fields.

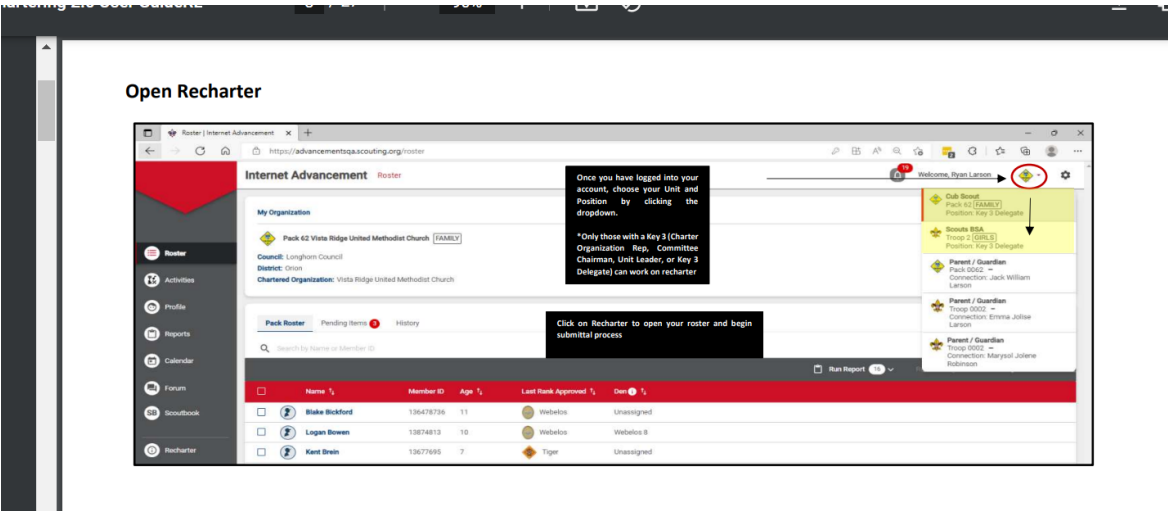
Recharter

Internet Rechartering may be accessed by the Unit Leader, Charter Org Rep, Committee Chair or Key 3 Delegate by logging into their Scoutbook.com or my.Scouting Account. Click Menu>INTERNET ADVANCEMENT. This is where Rechartering is done.

Or go to the Internet Rechartering site directly at <https://advancementscouting.org/>.

Follow the council instructions!

- 1. Go to <https://advancementscouting.org/>.
- 2. Choose your Unit.
- 3. Click the Recharter button on the left-hand side menu.



Resources

BSA Online Registration Guidebook (Web & Video)

<https://www.scouting.org/resources/online-registration/>

Unit Guidebook for Online Registration (PDF)

<https://www.scouting.org/wp-content/uploads/2021/04/Unit-Guidebook-for-Online-Registration-April-2021.pdf>

BSA Vimeo Channel (Video)

<https://vimeo.com/thebsa>

Scoutbook Help

www.help.scoutbook.scouting.org

Learn about the Den Leader Portal Experience in Scoutbook

[Den Leader Portal Experience](#)

Recharter

<https://advancements.scouting.org/>