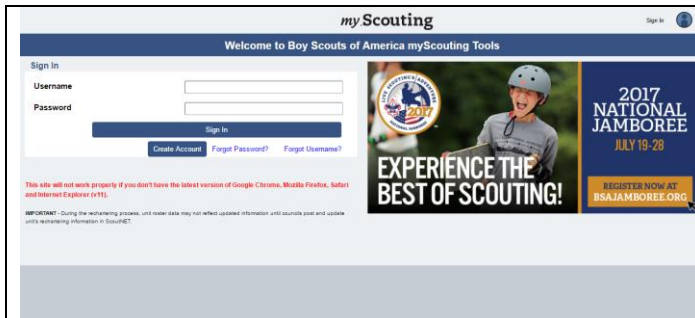


# My Scouting Tools: Online Registration

## Application Manager for Council

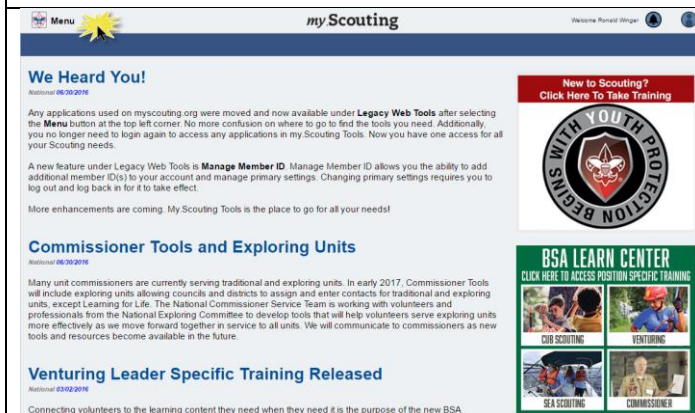


### OVERVIEW

To view and act on applications that have been submitted or reassigned to your Council, you'll want to log in to [my.scouting.org](http://my.scouting.org).

Keep in mind that only certain positions/roles have access to administer this tool, while others have read only access.

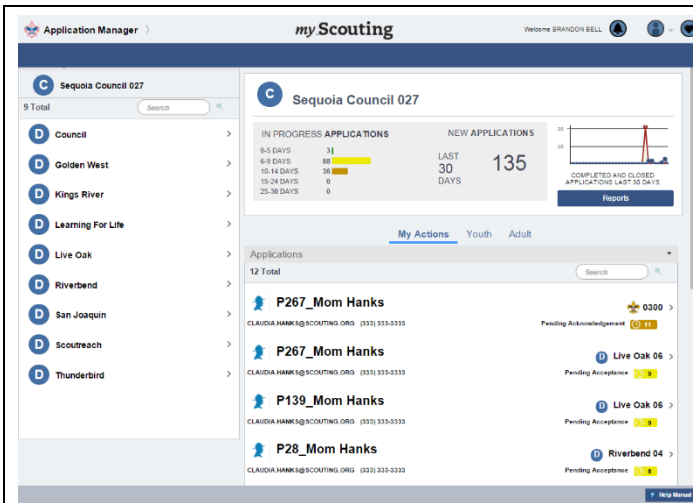
For more information, click [here](#).



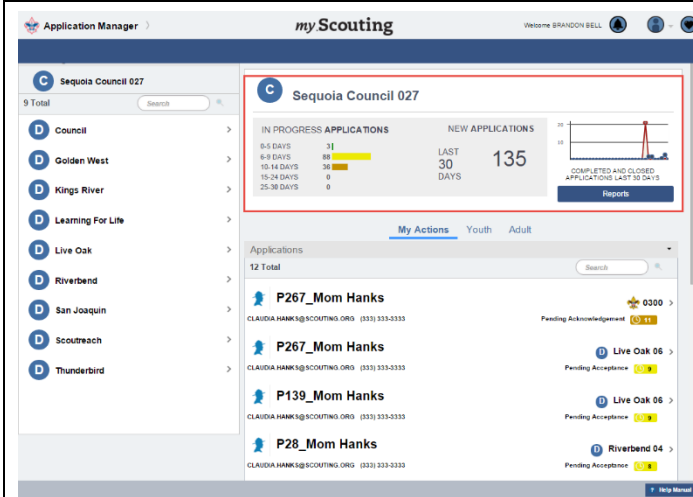
Once you are logged in, click Menu in the upper left corner.



Select your Council from the drop down list and click Application Manager from the tools menu.



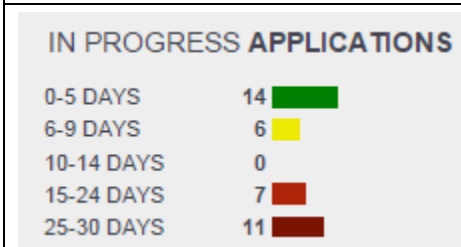
Your Council's Application Manager dashboard displays defaulting to the My Actions tab.



At the top right side of the screen, you'll see a breakdown of the applications in progress over the last 30 days as well as the number of new applications.

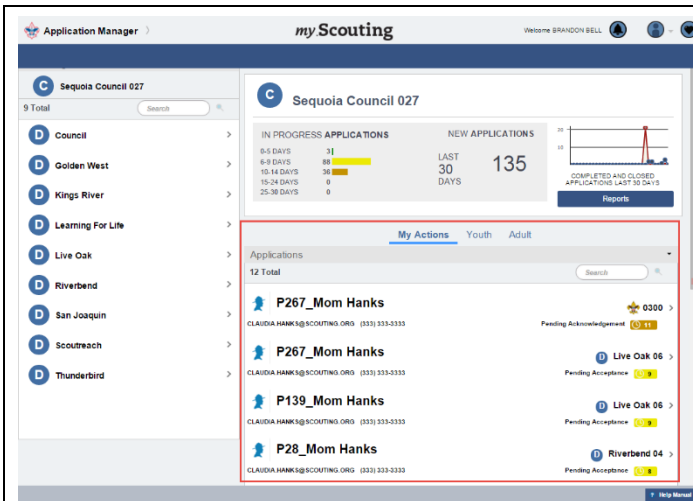
These counts represent all applications in progress for your Council as well as all the Districts and Units within your Council.

Once an application is submitted, a 30 day clock starts. The application is tracked through the system for 30 days, after which the application is timed out and removed from the list. That's why the view is always of the last 30 days. This is to encourage units to take timely action.



Here you'll see how many applications fall into each phase of the timer.

Note that this count represents in progress applications for the Council and all the Districts and Units within it.



The bottom right section shows the applications currently awaiting action by the Council along with their status. Council can take action on applications in the following statuses:

- Pending Acceptance (applications submitted to a District or Council)
- Pending Reassignment (application reassigned to the Council by a District)
- Pending Review (application marked “Do Not Accept” by a Unit)
- Pending Payment (applications that have been accepted by a Unit or the Council that are awaiting payment)
- Pending Refund (applications that have been paid but that have been either Withdrawn by the Applicant, Not Accepted by the Council or that have Timed Out due to not being completed within 30 days of submission)
- Pending Acknowledgement (applications accepted by the Unit even though one of the screen questions was answered “Yes”)

The clock icon beside each indicates the number of days they have been in the system. The color of the icon will correspond to where they are in the 30 day clock.

As applications age and move through the phases, their color changes to indicate their age.

The goal is to process all applications before they reach the 30 day mark. If the application is actionable at your level, you should take the appropriate action as soon as possible to avoid having it Time Out.

## PROCESSING APPLICATIONS

Now let's look at what you can do with the applications that come to you.

You have three different tabs here:

### My Actions, Youth and Adult

My Actions is the default. Applications that appear here require you to take action.

Each application is identified as either that of a youth or an adult.



Youth



Adult

As the Council SE or someone who has been assigned the "Registration Support" role, you'll be responsible for all applications listed under the My Actions tab.

Let's start by looking at one of the applications.

Click on an application.

An Application Actions window appears.

The main sections are:

1. Application Actions.
2. Application Summary – which also displays the Invoice where you can see if payment has been made or not.
3. Review Application button at the bottom.
4. And Application Notes in the upper right.

First you'll want to review the application. Click the **Review Application** button at the bottom.



## D Live Oak 06

Thanks for your interest in Boy Scouting! Fill out this form to join the unit you have selected. When you are finished click submit and we will review your details.

If you have any questions about the program or our application process, email us at [membership@scouting.org](mailto:membership@scouting.org).

### Steps to Complete your Registration - (All Steps Must Be Completed)

Step 1 - Volunteer Information	Completed
Step 2 - Background Information	Completed
Step 3 - Disclosures & Authorizations	Completed
Step 4 - Terms and Conditions	Completed

Status	Pending Acceptance
First Name	P267_Mom
Last Name	Hanks
Record Locator	MR-B03K-O0424-T21

[Back](#)

A new screen displays where you can review each step of the application by selecting the step.

While you can see all of the information, you cannot change anything.

If everything seems to be in order within the selected step, then click Done at the bottom of that page.

Review the remaining steps, then click “Back” to return to the Application Actions page.

## D Live Oak 06

### APPLICATION ACTIONS

Current Status: Pending Acceptance

Review the application before taking one of the following actions. Accept the application (ACCEPT), Accept to District (ACCEPT TO DISTRICT), Do Not Accept the applicant into Scouting (DO NOT ACCEPT), Return to Applicant for more information before processing (RETURN TO APPLICANT).

ACCEPT

ACCEPT TO DISTRICT

DO NOT ACCEPT

RETURN TO APPLICANT

### APPLICATION NOTES

BRANDON Ostlen BELL Thu Nov 12 2015 12:24 pm  
Added a Note to show an example

Post

Application Note Added

Application Accepted.

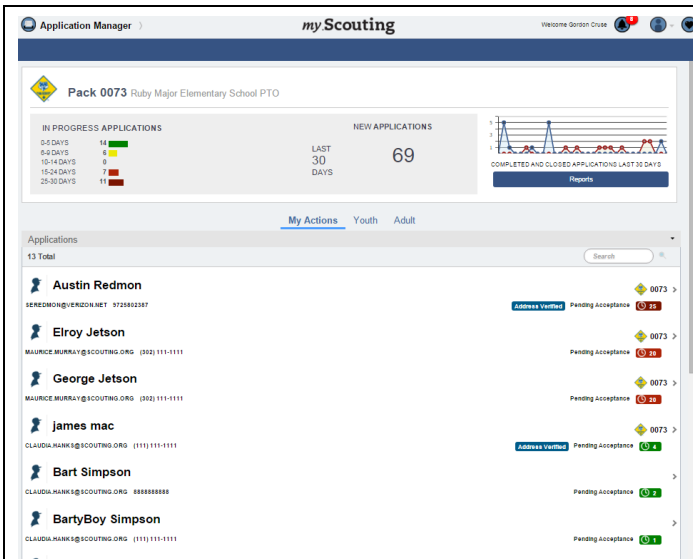
You also have a place to add notes. These notes will not be seen by the applicant but will be tied to the application.

To add a note, place your cursor in the field, type your message and click Post. Whatever is entered here becomes an official and permanent part of the application.

Your note will be added, along with your login information and the date. These notes are sorted last to first.

Be sure to add your notes before you click an Action Button.

If you are ready to accept this application, click Accept.

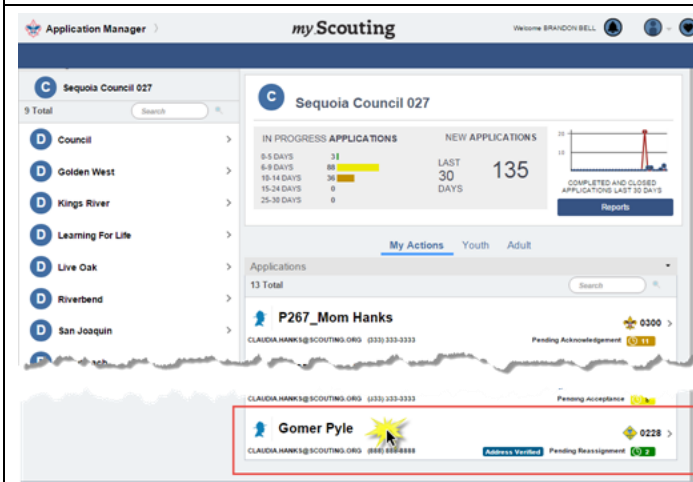


The application moves out of your My Actions section and may be in a pending payment status. We'll talk more about statuses in a moment.

If the applicant has already paid his fees, the system will automatically create the new membership record, add the person to the appropriate roster and send the Welcome Email with all the onboarding materials.

If fees have not been paid, the application will change to Pending Payment status and will continue to be listed in your My Actions screen. It will also be listed in your Daily Summary email as pending payment until payment is received or the application times out.

It is important to point out that the 30 day clock does not reset, it just continues. SO, it is good idea to keep an eye on these applications and step in and be proactive when necessary.



## PENDING REASSIGNMENT

If an application is in Pending Reassignment status under your My Actions screen, click it to open.



## Pack 0228

### APPLICATION ACTIONS

#### Current Status: Pending Reassignment

This applicant has been referred to the Council because the District has determined no placement options exist within that District. Review the summary below and determine whether to reassign the applicant down to another District for placement (REASSIGN DOWN), or decide not to accept the applicant into Scouting (DO NOT ACCEPT).

DO NOT ACCEPT

REASSIGN DOWN

### APPLICATION NOTES

MICHELE Rulia ROMERO Thu Nov 12 2015 12:38 pm

STATUS CHANGED Pending Reassignment.  
Reassign reason - Scheduling conflicts

BRANDON Ostden BELL Thu Nov 12 2015 1:14 pm

STATUS CHANGED Pending Reassignment.  
Reassign reason - Scheduling conflicts

Post

### APPLICATION SUMMARY

#### Gomer Pyle

Gender: Male

Phone: (888) 888-8888

Email: claudia.hanks@scouting.org

DOB: 1/1/1970

You'll have two actions available, Do Not Accept or Reassign Down. We have the Do No Accept action in the event all options to place this person have been exhausted and you need to be able to remove the application from the system.

If you need to reassign the application down to a District, click the **Reassign Down** button.



## Pack 0228

### Select an Organization

C

Sequoia Council 027

9 Total

Search

D

Council

D

Golden West

D

Kings River

D

Learning For Life

D

Live Oak

D

Riverbend

D

San Joaquin

D

Scoutreach

D

Thunderbird

### Select Organization

To reassign this application select an Organization from the list then click the Assign button

Assign

The list of Districts in your Council will display. Select a different District, and then click the Assign button on the right.

Once you've clicked "Assign", the application is moved from your My Actions section to the District's My Actions section where they will have the ability to reassign the application down to a Unit in that district.

You will be able to see the application in either the Youth or Adult tab under Pending Reassignment until the District places it with a new unit. Then it will change to "Pending Acceptance" status.

Remember, the 30 day clock never resets itself so if you receive a reassignment from your District requesting to move a Scout into a new unit, it is important you take action on the application as soon as possible.



**D Live Oak 06**

**APPLICATION ACTIONS**

**Current Status:** Pending Acceptance

Review the application before taking one of the following actions. Accept the application (ACCEPT), Accept to District (ACCEPT TO DISTRICT), Do Not Accept the applicant into Scouting (DO NOT ACCEPT), Return to Applicant for more information before processing (RETURN TO APPLICANT).

ACCEPT ACCEPT TO DISTRICT  
DO NOT ACCEPT RETURN TO APPLICANT

**APPLICATION NOTES**

BRANDON Ostden BELL Thu Nov 12 2015 12:24 pm

Added a Note to show an example

Post

**APPLICATION SUMMARY**

**P267\_Mom Hanks**  
Gender: Female  
Phone: (333) 333-3333  
Email: claudia.hanks@scouting.org  
DOB: 1/1/1970

If you have an application that requires additional information or you have questions, click **Return to Applicant**.

**D Live Oak 06**

**APPLICATION ACTIONS**

**Current Status:** Pending Acceptance

Review the application before taking one of the following actions. Accept the application (ACCEPT), Accept to District (ACCEPT TO DISTRICT), Do Not Accept the applicant into Scouting (DO NOT ACCEPT), Return to Applicant for more information before processing (RETURN TO APPLICANT).

ACCEPT ACCEPT TO DISTRICT  
DO NOT ACCEPT RETURN TO APPLICANT

**APPLICATION NOTES**

BRANDON Ostden BELL Thu Nov 12 2015 12:24 pm

Added a Note to show an example

Post

**APPLICATION SUMMARY**

**P267\_Mom Hanks**  
Gender: Female  
Phone: (333) 333-3333  
Email: claudia.hanks@scouting.org  
DOB: 1/1/1970

Enter instructions to return to the applicant.  
Please provide a street number in your address  
Cancel Confirm

Enter instructions, comments or questions for the applicant in the text box provided. This information will be included in the email to the applicant requesting the additional action needed.

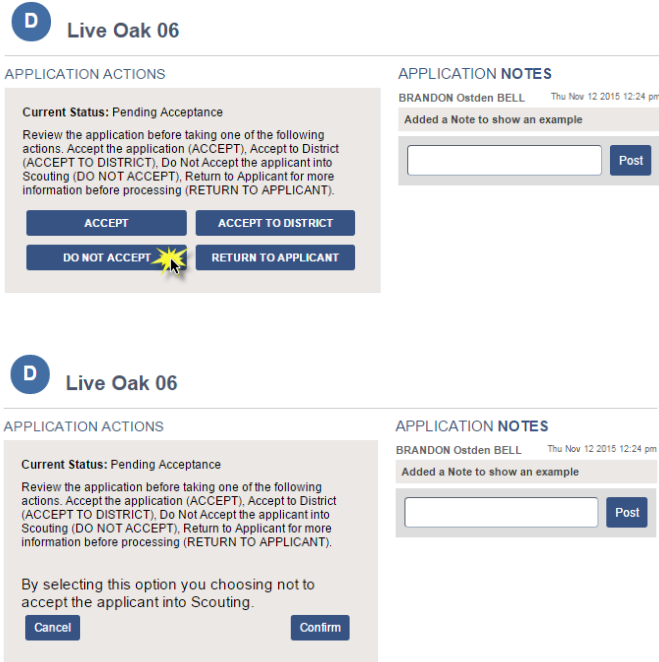
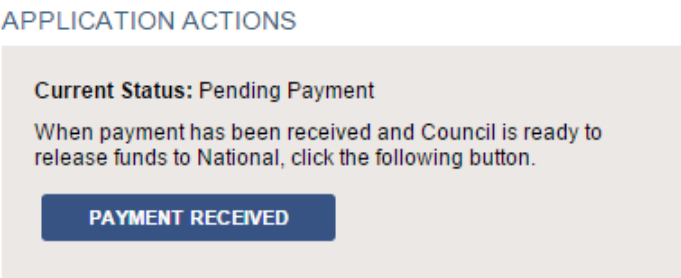
Be sure to add your notes. Remember, any Notes entered ties it to the application that the applicant CANNOT see.

Once you have entered your instructions or questions for the applicant, click Confirm.

The application is removed from your My Actions section. An email with a link to the application is sent to the applicant and the application is now in a status of Pending Applicant Response. You can see it in either the Youth or Adult tab under that status.

Applications in Pending Applicant Response status can be edited by the Applicant, the SE or someone with the Registration Support role. Also, SE & Registration Support still have access to the Accept, Reassign and Do Not Accept Actions. We reasoned that sometimes the applicant may respond that there is nothing to be changed on their application. Or the applicant may just ask you to make the change for them. Edits can be made as long as they would not result in changes to the shopping cart. For example, neither the applicant nor



	<p>you will be able to add or remove a Boys' Life Subscription</p> <p>Remember, the 30 day clock keeps ticking so you'll want to keep an eye out for their response and perhaps even reach out to them to make sure they got your message.</p>
 <p>The screenshot shows the 'Live Oak 06' application interface. It has two main sections: 'APPLICATION ACTIONS' and 'APPLICATION NOTES'. Under 'APPLICATION ACTIONS', the 'Current Status' is 'Pending Acceptance'. It lists several actions: 'ACCEPT', 'ACCEPT TO DISTRICT', 'DO NOT ACCEPT' (which is highlighted with a yellow starburst), and 'RETURN TO APPLICANT'. Under 'APPLICATION NOTES', there is a note from 'BRANDON Ostden BELL' dated 'Thu Nov 12 2015 12:24 pm' with the text 'Added a Note to show an example' and a 'Post' button.</p>	<p>The last option you'll have for applications in Pending Acceptance status is <b>Do Not Accept</b>.</p> <p>If you identify an applicant you believe should not be accepted into the BSA, click "<b>Do Not Accept</b>".</p> <p>If the application was already paid, the status will change to Pending Refund awaiting the SE's communication with the applicant and authorization to refund the payment.</p> <p>If the application was not yet paid, it will go to "Closed" status. There's still the SE's manual step to communicate the decision to not accept the application with the applicant.</p>
 <p>The screenshot shows the 'PENDING PAYMENT STATUS' application interface. It has a section titled 'APPLICATION ACTIONS' with a 'Current Status: Pending Payment'. Below this, it states: 'When payment has been received and Council is ready to release funds to National, click the following button.' There is a large blue button labeled 'PAYMENT RECEIVED'.</p>	<p><b>PENDING PAYMENT STATUS</b></p> <p>If an application is in Pending Payment status and you've received the payment, click on the application to open it.</p> <p>Click the <b>Payment Received Button</b> to mark it paid.</p> <p>The application will immediately be onboarded, added to the roster and the Welcome email will be sent.</p> <p>If it's an Adult application with any of the screening questions answered "Yes", it will go to Pending Acknowledgement status. The system will send an email to the SE and those in the Registration Support role to inform them of the situation.</p>

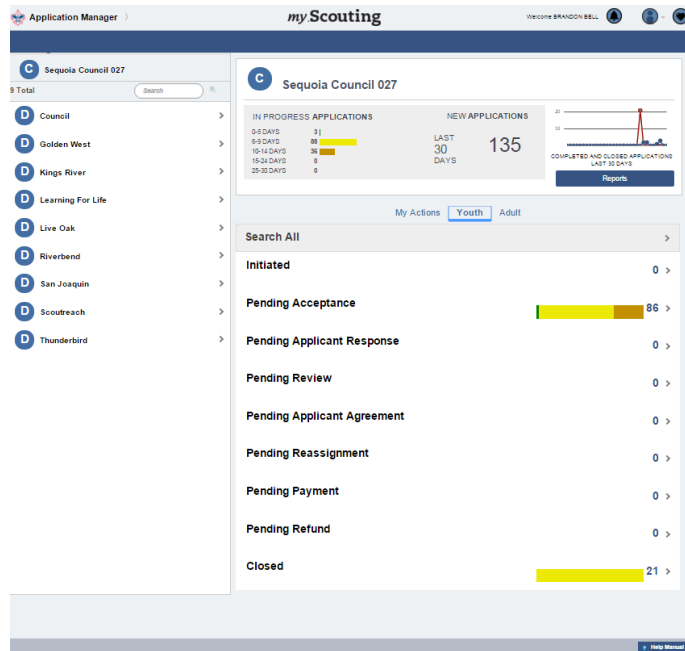
	<p>If it's a Youth or Adult application without a "Yes" answer, it will go directly to Completed status.</p>
<p><b>APPLICATION ACTIONS</b></p> <div> <p><b>Current Status:</b> Pending Acknowledgement</p> <p>This application has been referred to the Council because the applicant answered Yes to at least 1 of the Background screening questions</p> <p><b>ACKNOWLEDGE</b></p> </div>	<p><b>PENDING ACKNOWLEDGEMENT STATUS</b></p> <p>As mentioned previously, an Adult application that was accepted, paid and onboarded with having any of the screening questions answered "YES" will be set to Pending Acknowledgement status. The SE and those in Registration Support roles will receive an email alerting them to the situation. The action is to open the application and click the Acknowledge button. This will finish the process and put the application in Completed status.</p>
<p><b>APPLICATION ACTIONS</b></p> <div> <p><b>Current Status:</b> Pending Refund</p> <p>Please click the following button to initiate the credit card refund</p> <p><b>Reason :</b> Withdrawn By Applicant</p> <p><b>INITIATE CC REFUND</b></p> </div>	<p><b>PENDING REFUND STATUS</b></p> <p>If a paid application has been Withdrawn, Not Accepted or Timed Out, the fees are to be refunded to the applicant.</p> <p>If the application was paid with a credit card the fees will be refunded to the same credit card. The action button available is "Initiate CC Refund" to trigger the system to refund to the credit card.</p> <p>The application will then go to Closed status.</p>
<p><b>APPLICATION ACTIONS</b></p> <div> <p><b>Current Status:</b> Pending Refund</p> <p>Please issue a refund. When complete, click the following button</p> <p><b>Reason :</b> Withdrawn By Applicant</p> <p><b>COMPLETE REFUND</b></p> </div>	<p>If the application was paid with a manual payment, the council will need to refund using existing manual processes. Once the refund has been sent to the applicant, use the "Complete Refund" button on the Pending Refund application to mark the refund completed.</p> <p>The application will then go to Closed status.</p>

## APPLICATION ACTIONS

**Current Status:** Closed

No actions are available from this view. Can only open application to gather information  
**Reason :** Do Not Accept

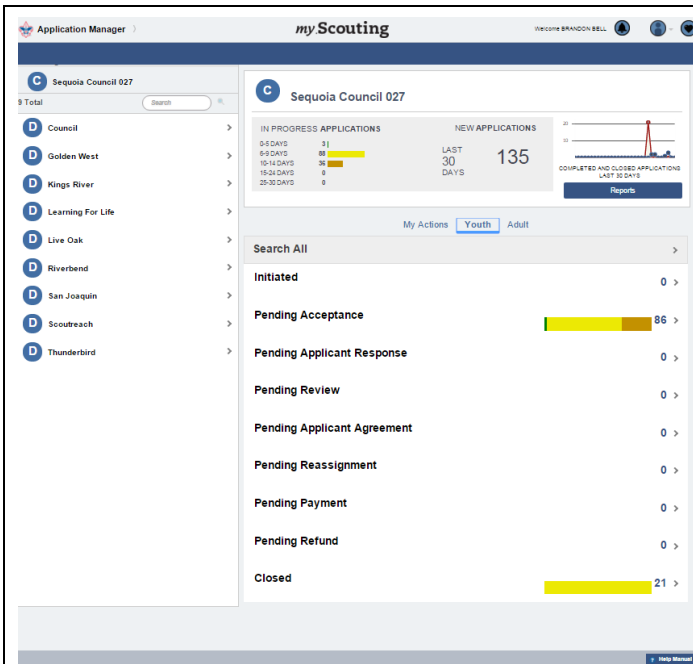
Applications in CLOSED status will include the Reason it was closed.



## YOUTH/ADULT TAB OVERVIEW

Now let's look at the other two tabs.

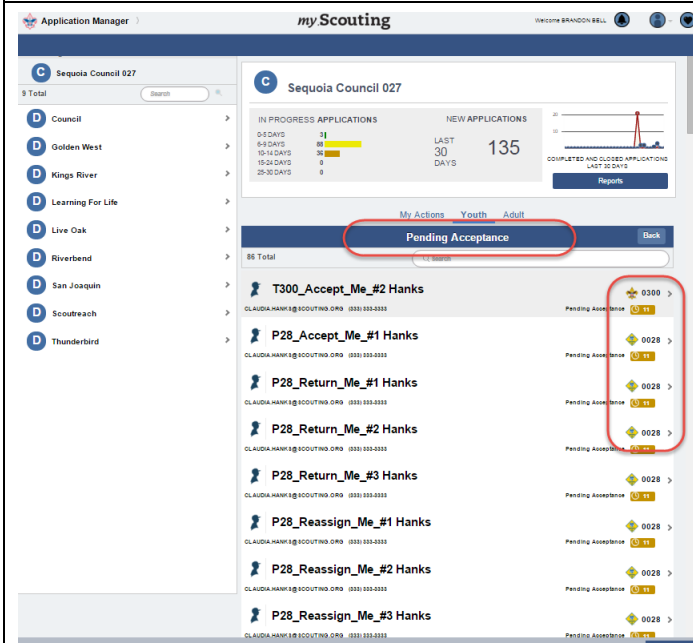
If you click the Youth tab,



You'll see a list of the different statuses that the applications can be in.

Next to each of the statuses, you'll see the number of applications in that status as well as a color coded bar indicating the age the applications are in. The color of the bar is tied to the percentage of applications in each phase of the 30 day clock.

The counts represent the total number of applications in your Council and Units within your District.



Clicking on a status group, Pending Acceptance in this example, will display all the applications that are in that particular status. They will look very much like they did under your My Actions tab.

Note the various units identified in the right side of each application.

**Pack 0028**

**APPLICATION ACTIONS**

Current Status: Pending Acceptance  
This application is pending acceptance at the Unit. No action is available.

**APPLICATION NOTES**

**Post**

**APPLICATION SUMMARY**

**P28\_Accept\_Me\_#1 Hanks**  
 School:  
 Grade: 2nd Grade  
 Gender: Male  
 DOB: 01/01/2008  
 Invoice

**BOY SCOUTS OF AMERICA**  
 P28\_Mom Hanks  
 100 Elm St  
 Reedley, CA 93654  
 USA  
 Pack 0028

If you click on an application record, you'll see the details. If it is an application that you can act upon, you'll see the action buttons under Application Actions.

If it is not one of your actionable applications, you can still review the application and leave notes.

The idea is that you can see the status of all the youth applications in your Council. If an application is waiting on a response from someone or requires payment, you can be proactive when necessary in order to avoid the email notifications and escalation process.

Click the x in the upper right hand corner of the record to close it and bring you back to the Application Manager Dashboard.

**Application Manager** | myScouting | Welcome BRANDON BELL

**Sequoia Council 027**

**IN PROGRESS APPLICATIONS**

0-5 DAYS	6-10 DAYS	11-15 DAYS	16-20 DAYS	21-25 DAYS
31	88	35	0	0

**NEW APPLICATIONS**

LAST 30 DAYS: 135

**COMPLETED AND CLOSED APPLICATIONS**

LAST 30 DAYS: 0

**My Actions** | Youth | Adult

**Pending Acceptance**

88 Total

**T300\_Accept\_Me\_#2 Hanks** | Pending Acceptance | 0309

**P28\_Accept\_Me\_#1 Hanks** | Pending Acceptance | 0028

**P28\_Return\_Me\_#1 Hanks** | Pending Acceptance | 0028

**P28\_Return\_Me\_#2 Hanks** | Pending Acceptance | 0028

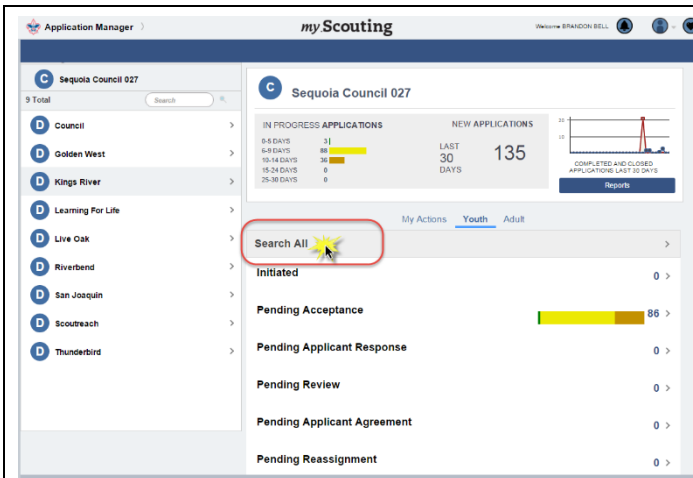
**P28\_Return\_Me\_#3 Hanks** | Pending Acceptance | 0028

**P28\_Reassign\_Me\_#1 Hanks** | Pending Acceptance | 0028

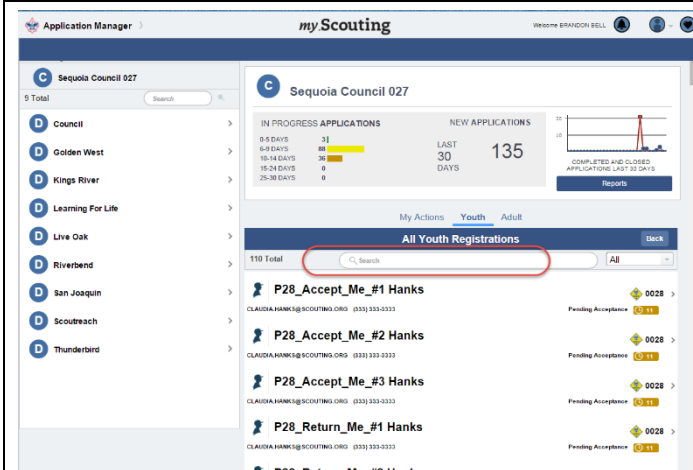
**P28\_Reassign\_Me\_#2 Hanks** | Pending Acceptance | 0028

**P28\_Reassign\_Me\_#3 Hanks** | Pending Acceptance | 0028

Click the Back button on the blue header bar to return to the list of statuses.



Clicking Search All...



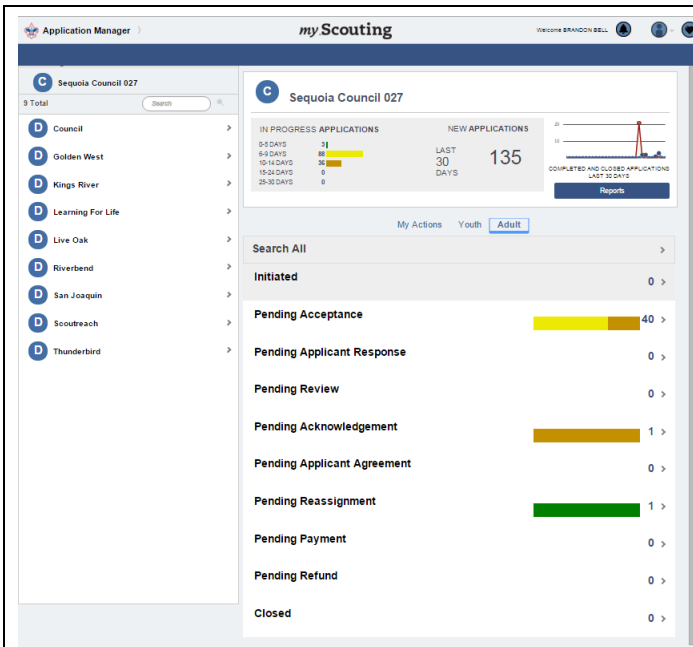
Will bring up a list of all records, regardless of status.

Enter your search criteria in the “Search” field to filter the results.

Again, if you have a record that you can act upon, you’ll see the action buttons when you open it.

If it is not one of your actionable items, you can still review the application and leave notes.

Click the x in the upper right hand corner of the record to close it and bring you back to the Application Manager Dashboard.



Clicking the Adult tab will bring up the same type of information you saw under Youth and it will work the same way as the Youth listing.

Using the tools provided on your dashboard will help you to keep an eye on all applications and make sure that all potential members have the opportunity to get involved in Scouting.