2017 Charter Renewal Checklist

60 – 45 days before the Charter Renewal Turn In Day - Getting Prepared
- ❑ Check your Member Manager Roster from www.my.scouting.org. If you do not have rights to the account, request your Charter Org. Rep, Committee Chair or Unit Leader to go into Organization Security and give you access.
- ❑ Print out the roster and compare to actual rosters.
- ❑ Gather applications and fees for the remainder of the year for anyone not on the roster or check with your District Executive to determine the status if you have already turned them in.
- ❑ Check www.my.scouting.org again for these applications to be posted.
- ❑ Once you see these applications in your system, you may begin the online Charter Renewal process.

50 – 30 days before the Charter Renewal Turn In Day - Membership Inventory and Youth Protection Adult Training Check
- ❑ Contact every member of your unit to confirm whether the Scout or adult will continue to participate with your unit in 2018
  - o If not, note the reason and save it for Stage 4 of the internet Charter Renewal
  - o Do not drop them unless they confirm that they do not wish to continue
- ❑ Ensure that all registered adults have taken Youth Protection Training within two years of your unit's Charter Renewal expiration date (see separate insert on verification procedure for this requirement)

40 – 20 days before the Charter Renewal Turn In Day - Final Preparatory Step: Get all your missing applications and fees
- ❑ If someone is missing from the internet roster, then you will need an application and proof of current Youth Protection Training (if an adult) from them, even if they have submitted one before
  - o Please note that if the person is missing from this roster, they will also be missing from the Internet Charter Renewal System
  - o There are no exceptions to this – this is National and Atlanta Area Council policy
- ❑ When you get a youth application, make sure:
  - o The parents sign it (or the youth, if it is for a Venturer)
  - o The unit leader signs it
- ❑ When you get an adult application, make sure:
  - o They provide their real, full social security number (do not make one up – this will only delay the processing of your unit's Charter Renewal Application)
  - o The volunteer answers all questions and signs the application, including the completed disclosure form on page two of the application – don't let them forget to initial the new disclosure statements right above the signature line on the actual application.
  - o The Committee Chair signs the application
  - o The Charter Organization Representative (COR) signs the application
  - o The adult attaches a copy of his/her Youth Protection Trained (YPT) card to the application. YPT may be taken by creating a profile (with or without the member ID number) at www.my.scouting.org
- ❑ Make an appointment in advance with the Charter Organization Head and the COR, so that you can review the unit's status and get the signatures on the completed Charter Renewal Application form several days before the Charter Renewal Day date printed above
- ❑ Collect all the registration fees (usually this may be part of your yearly dues)

30 – 15 Days before the Charter Renewal Turn In Day - Prepare Your Data for Internet Charter Renewal
- ❑ Decide which of the two options you are going to use for the existing registration data:
  - o You can download the data that the Council has on file for your unit, or
  - o You can upload the data that you already have in your Unit Management system (Scoutbook, PackMaster, TroopMaster, ScoutSoft or Rank N File)
- ❑ If you are going to download the Council data, proceed to the next section "Internet Charter Renewal"
- ❑ If you are going to upload the data from PackMaster or TroopMaster:
  - o Click on the following menu and sub-menu drop downs:
    - • <u>Reports</u> then

- - Scout/Unit General then
  - Council Charter Renewal then
  - Annual Charter Renewal
  - o Follow the screen prompts to create your transfer file
- ❑ If you are going to upload the data from ScoutSoft, use the <u>Maintenance> Charter Renewaling</u> subsystem to create the transfer file
- ❑ If you are going to upload data from Rank N File, please contact the vendor for the specifics of how to create the transfer file

Once you have created the transfer file, make a note of the directory on your PC in which you stored the file. You will have specified this directory as part of creating the file. You will need this shortly after you log into the Internet Charter Renewal System along with the filename that it created (it will be a file starting with the letters "CHT", followed by a letter and four numbers) and will have a file extension of ".csv"

25 – 10 days before the Charter Renewal Turn In Day - Internet Charter Renewal

- ❑ If you're not familiar with the Internet Charter Renewal system, take the tutorial by following the link below.
  - https://scoutnet.scouting.org/ucrs/Help/tutorial/main.html.
  Some of the terms may have changed but the process is still outlined.
- ❑ Sign on to the Internet Charter Renewal System by logging into www.my.scouting.org and choosing the link to <u>Internet Charter Renewaling</u> on the left. Before you log in, be sure everyone on your roster appears in your www.my.scouting.org account. If someone is missing, you have the option to submit an application to council and wait for them to appear on your roster or you can manually enter the application(s) in to the renewal system.
- ❑ If this is the first time in the Charter Renewal cycle that you have logged on with this access code, click on <u>First Time User</u> (no matter how many years you have done this in the past)
  - o Enter your Internet Access Code as well as your Unit Type and Unit Number (unit number is always four digits, ex. 0123 or 1234)
  - o Agree to the Confidentiality Agreement and then enter your contact info and password
  - o It is critical that you write down the password you just chose and share it with anyone who might be helping with your unit's Charter Renewal. If you lose it, the only option is to contact a Customer Service Specialist at the Volunteer Service Center to reset the password.
  - o After this, whenever you return to the system, you can click on <u>Returning User </u>and enter your access code and the password you just selected
- ❑ If you decided to use the data currently on the BSA database as a starting point (see previous section), click on <u>Load Council Information</u> on the next screen that appears
- ❑ If you decided to use the data from your Unit Management system to start off, then choose <u>Upload Charter Renewal File</u> and then
  - o Browse to the directory that you stored your data transfer file (see the "Prepare Your Data for Internet Charter Renewal" section above)
  - o Click on the <u>filename</u> and then on <u>Open</u>
  - o Click on <u>Verify File</u> and then <u>Continue</u>
- ❑ You have now finished Stage 1 – Load Roster
- ❑ Follow the online instructions for Stages 2 through 5
  - o If you have followed the steps above, you should not have any major issues
  - o If you do run into an issue that causes you to want to start over, you can do that as long as you have not hit the <u>Submit</u> button in Stage 5 – please call Donna Carr at the Volunteer Service Center at 770-956-5694 or email her at dcarr@atlantabsa.org.
  - o If you choose to start over, this will reset the process back to the beginning of the "Internet Charter Renewal" section of these instructions
- ❑ Make sure you update all leader information and the exact addresses for all of their members, along with email addresses if you have them. You should not assume that a member is living at the same address as last year
- ❑ From any screen, you can get help by clicking on "Frequently Asked Questions" or by clicking "Help", both on the upper right hand corner of each screen

- ❑ At any time during this process, we encourage you to print out the roster and compare it against the results you are expecting
  - o Remember that if you do not see three lines for signatures on the top of the page on the second page of the printout, then you are looking at a roster not a valid Charter Renewal Application. A roster cannot be turned in as a Charter Renewal Application
- ❑ After you finish Stage 4 – Update Fees, you are taken to the Stage 5 – Submit Roster. Do not click the Submit button yet. Instead, print one or more copies of your roster and give the copies to other unit leaders (such as Den Leaders or ASMs) to check for accuracy. This will greatly speed up the process by reducing the number of errors that might still be in the roster
- ❑ Once everyone is satisfied with the roster, then log back into the system and on the Stage 5 – Submit Roster screen, click the Submit button
- ❑ Click on Print the Charter Renewal Application and choose to print out three copies
  - o Be sure to include page one of your Charter Renewal Application in your Charter Renewal Envelope – even if it is blank! That helps the registrars to process your charter faster because they know immediately how many new applications to process (a blank page means none)
- ❑ Get the signature page (page two) of the Charter Renewal Application signed by the Unit Leader (Cubmaster, Scoutmaster, Advisor, Skipper…) and the Charter Organization's Executive Officer (this is the head of the Charter Org, as printed on page two of the Charter Renewal Application – it is not the Charter Org Representative)
  - o Note that if you cannot find a signature page, then you are working with a roster not a Charter Renewal Application – you will need to go back to the Stage 5 screen of the Internet Charter Renewal System and click on the blue Submit button and then print three copies of the Charter Renewal Application

District Charter Renewal Turn In Day

- ❑ Check and double check that all the correct signatures are on all the documents:
  - o Charter Renewal Application – Unit Leader and Executive Officer (not COR) signatures
  - o Adult applications – Adult applicant, Committee Chair and COR signatures
  - o Youth applications:
    - ▪ For Venturing, Explorer and Ship youth applications – Youth and Crew Advisor/Skipper signatures
    - ▪ All other youth applications (Cub Scout, Boy Scout etc) – Parent and Unit Leader signatures
- ❑ Bring one copy of the signed Charter Renewal Application (give the second copy to your Charter Org Representative and keep the third copy for your unit records) – DO NOT bring the summary report signed or otherwise, it is not the Charter Renewal Application which is required for posting your Charter Renewal.
  - o Include page one of the Charter Renewal Application printout even if it is blank
  - o Include applications for all new adults and youth listed on page one
  - o Attach proof of Youth Protection Training for all adults listed in your Charter Renewal as needing it (see last page of the Charter Renewal Application) and all new adult applications on page one – if you do not bring these, it will slow down the Charter Renewal processing significantly
- ❑ Bring three blank unsigned checks – better yet, bring your Treasurer with the checkbook
- ❑ Check with your Unit Commissioner to see what other items that you should bring to Charter Renewal day – these items, if any, may be explained by your District, often in a Charter Renewal Training class that they present

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Just fyi, the final steps of the process that happen after you turn in your Charter Renewal Envelope:
- o Council registration validation and posting to the National database (takes up to 1 month)
- o Mailing the membership cards to the Unit Leader, per Charter Renewal info (up to 2 weeks) If you are in a hurry and can't wait for the council to send them to you, you can go into the membership manager section of www.my.scouting.org and print the cards.

SOME TRICKS OF THE CHARTER RENEWAL TRADE
Direct any questions to your Unit Commissioner

- All registered leaders must have completed youth protection training within two years of the date that your unit expires (December 31). See the separate insert for more detail and instructions.
- There is no fee for the Executive Officer (Institutional Head) but they need to be listed on the Charter Renewal Application
- Every unit sponsored by a Charter Organization must have the same Executive Officer (IH) and the same Charter Org Rep (CR) listed on the Charter Renewal Application
- Charter Org Reps are the only leaders that can hold more than one position in a unit
    - A COR can also be Committee Chair or a Committee Member but no other position
- Your unit needs a minimum of five paid youth
    - If a Boy Scout in a Troop is also registering in a Venture Crew, we suggest getting him to pay in the Venture Crew and register as a multiple in the Troop (this takes coordination with 2 units)
- Units, other than Packs, must have a minimum of five paid adults: Charter Org Rep (CR), Unit Leader (SM, SK, EA or NL), Committee Chair (CC) and either two Committee Members (MC) or one Parent Coordinator (PC) and one Committee Member (CM)
    - Packs must have all of the above positions plus at least one Den Leader (DL), one Tiger Leader (TL), or one Webelos Leader (WL) if you have Webelos
- Every adult application must have the valid Social Security Number of the person applying. Do not put in made up numbers or partial numbers (such as the last four digits) – the application will not be processed
    - If an SSN comes back as invalid, it requires a lot of time and effort on the part of you and the Council office to contact you and resolve it
    - If you cannot get an application or the YPT certificate from a leader, then take him/her off the roster and register/re-register them after the Charter Renewal Application has been processed.
- Every Tiger Cub must have a Tiger Partner
    - Tiger Partners must provide a valid birth date on the youth application in the parent section
    - Tiger Partners do not have to pay a fee unless they are also registering as a member of the Pack leadership. If the Tiger partner agrees to become the Tiger Leader or a member of your unit leadership, they must complete an Adult Leader application, take youth protection training and pay the appropriate fees

Accuracy is paramount – an error in the Charter Renewal Application will cause a significant delay in the charter renewal process

- You cannot transfer during the Charter Renewal process. If you have a transfer, they must pay the full Charter Renewal fees for the coming year.
- Packs: remember to Charter Renewal your Arrow of Light Scouts – otherwise they can't crossover to Boy Scouts
- If you lose your internet access code, contact your Unit Commissioner – remember that they cannot help with passwords
- Internet Charter Renewal begins in November and is no longer available once your unit expires December 31st of the current year – ask your Unit Commissioner if you are unsure)
- Don't wait to start the process – start from the top of this checklist and follow the steps in order. The process documented here will minimize your effort, maximize your accuracy and optimize your time to Charter Renewal

FOR INFORMATION/QUESTIONS, PLEASE CONTACT YOUR UNIT COMMISSIONER OR:

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