These slides will show you how to make effective use of BeAScout to attract new youth and families to your unit, and to use Online Registration so that you can avoid having to carry paper applications. Having volunteers fill out the applications online also improves security as it limits who has access to their Personal information.
Units in our council may use an online registration process that will allow each unit to sign up new members digitally and complete the entire acceptance process without having to hand off paperwork. This system allows for digital signatures and online credit card payment making it fast and easy for the new applicant.

There are a few things that the unit needs to do to get ready:

1. Update your Settings and Unit Pin – in the Organization Manager link of your Unit section in My.Scouting
2. Know how you can use the Invitation Manager tool (applicants will be using it to contact you)
3. Know how you can use the online (digital) application that the applicant will fill out
4. Know how you can use the Application Manager tool to track and approve Applications
5. And, know the online resources available to help you use the system.

(click)
https://www.scouting.org/resources/online-registration/ provides online training and guidebooks that provide step by step instructions. There are also other resources such as frequently asked questions that you may also find helpful.

(click)
https://www.scouting.org/resources/online-registration/ provides online training and guidebooks that provide step by step instructions. There are also other resources such as frequently asked questions that you may also find helpful.

(click)
BeAScout

What Everyone Can See

(click)
What Does Your BeAScout Say?

Here's one with *some* information ... but not much ...

Pack [Redacted] ELEMENTARY

[Redacted] Dr
Atlanta GA [Redacted]

- Boy Pack
- Online Registration available for this unit

[Request More Information] [APPLY NOW]
What Does Your BeAScout Say?

More Information!

Pack 0912 MORROW FIRST UNITED METHODIST CHURCH

5985 Jonesboro Rd
Morrow GA 30260

Contact: Charles Toole
Phone: (678) 356-4353
Email: tonytoole112@gmail.com
Website: https://m.facebook.com/cubpack912/

☐ Dens for Boys or Girls
☐ Online Registration available for this unit.

We meet at Morrow First United Methodist Church on Tuesday evenings at 7:00 PM.

Request More Information  APPLY NOW
Online registration administration tools for units are accessed through your my.Scouting account. If you don’t currently have an account, you will need to create one to use Online Registration. If you do have an account, make sure that your email address and the rest of your profile is current so that you get notifications and information that you need to use the new tools.

The tools contained within My.Scouting are role based. Therefore your unit needs to have the Unit Key 3 correctly registered so that they can take action in the system. So if you change Committee Chairs or your top leader, you need to get that information in to the council as soon as possible so that they can be registered correctly which will enable access to these tools.

Page 4 of the Online Registration Unit Guidebook walks you through the steps to update your My.Scouting account.

(click)
Go To Unit, Organization Manager

myScouting

Empowering you to deliver the Scouting program.

It is a new functional role that will allow a chartered organization to be able to accept applications submitted through online methods in my Scouting.

Manager and managing new member leads is being updated by Scouting.org/resources/online-registration.

Manager, it has been moved from the MyBSA platform and...
Unit Pin: Additional Unit Information

Pack 631 has an ambitious outdoor program, with Pack events and/or Den Adventures every month, all around the Atlanta metro area - and sometimes beyond. Dens meet on days and at locations convenient to the families in the Den. Parent participation is leading our Scouts is key! During physical distancing due to COVID-19 concerns, the Pack and Dens will share ideas for family-centered events at times convenient for each family – and find ways to let each family share with others in the Den.

Unit Meeting Address

Address Line 1:
Woodward Academy

Address Line 2:
1662 Rugby Ave and Other Locations around
**Fields to Display**

**Fields to Display on Unit Pin:**

- Unit Meeting Address:
- Contact Person's Name:
- Phone Number:
- Contact Email:
- Unit Website:
- Additional Unit Information:
Edit and ... SAVE

ZIP Code:
30337

LOCATION

SAVE

Prepared. For Life.
Switch to **Settings**

**Pack 0631**

**Settings**

Organization Manager

**Unit Pin**

- **Settings**
  - **Membership Application Approval**
    - Select who has the ability to accept (approve) applications for your unit. 
      - Chartered Org Representative Approval Required
      - Committee Chair Recommendation and Chartered Org Representative
  - **Adult Applications**
    - Allow Adult Applications
  - **Types of Youth Applicants This Pack Accepts**
    - Girl Only
    - Boys Only
    - Both Boys and Girls

Please be aware that as of July 1, 2020, online applications may only be accepted by the Chartered Organization Representative.
Embedded “Sample” Emails

Fee Emails
 INCLUDED

Fee

13C

Amount

Explanations for additional fees that your unit charges. This information will be emailed to applicants.

See Sample Email

This unit collects an activity fee to cover the cost of advancement recognition and a t-shirt.

Online Registration Emails
 INCLUDED

Welcome Emails

Please create a welcome email with information about your unit that will be sent to new parents and volunteers who are accepted to your unit. Suggested types of information you should include are: meeting information (location/time/frequency), leader contact info, any website/social media pages for your unit, cost/dues, etc. (Keep it brief as not to overwhelm them right after they join.)

See Sample Email

We meet as a pack the first Wednesday of the month from 6:30-7:30 in the [[room/building/address]] during the school year. You will also meet separately with your den (based on grade and gender) approximately twice a month. We also have an active summer program that works well with busy family schedules.
### You Can Make Better Emails

**Include Fees/Fee Explanations**

| Fee | $13C |

Amount

Explanations for additional fees that your unit charges. This information will be emailed to applicants.

When you sign up using online registration, you’ll pay for Cub Scout Registration directly to the BSA organization. To deliver the Cub Scout Program, the Pack also collects $130 in dues for other costs over the program year (this August through next summer), like BSA registration for calendar year 2021 ($66), Boys’ Life Subscription, Leader Registration costs, Cub Handbooks, generic uniform patches, Recognition and Rank Badges, Pack T Shirts, Pinewood Derby kit and awards, Blue and Gold Banquet and more. If you register to be an adult leader (and we welcome that), send us your receipt at membership@atlanta631.mypack.us and we’ll reimburse you (leader registration fees are paid out of youth dues).

For more about us, see [https://atlanta631.mypack.us/node/2](https://atlanta631.mypack.us/node/2), and feel free to contact our Webmaster at webmaster@atlanta631.mypack.us, and the Webmaster will put in in contact with key leaders and enroll you into our website.
You Can Make Better Emails

Welcome Emails

Please create a welcome email with information about your unit that will be sent to new parents and volunteers who are accepted to your unit. Suggested types of information you should include are: meeting information (location/time/frequency), leader contact info, any website/social media pages for your unit, cost/dues, etc. (Keep it brief as not to overwhelm them right after they join.)

Greetings. Thank you for your interest in Pack 631, Chartered by Woodward Academy. You will be receiving lots of information from the BSA, and from the Atlanta Area Council, and we’re going to provide you with information too – focused on our Pack and our Dens and how Pack 631 does Scouting. Some of these messages we send will modify some of the BSA and Council messages (like about Uniforms and Patches – we don’t want you to buy what you don’t really need). And other messages will be about key roles all parents need to play as we do Scouting together for these kids.

For more about us, see https://atlanta631.mytroop.us/node/2, and feel free to contact our Webmaster at webmaster@atlanta631.mytroop.us and the Webmaster will put in in contact with key leaders and enroll you into our website.

More about us is found at https://atlanta631.mytroop.us, including our upcoming Pack Activities.

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Email and Other Templates

https://www.atlantabsa.org/updateBeAScoutpin
Fee Email Template

When you sign up using online registration, you'll pay for Cub Scout Registration directly to the BSA organization. To deliver the Cub Scout Program, the Pack also collects dues for other program costs, so the remaining dues cost for the 2020-21 program year is $____. That covers program costs like [Pick Highlights that Your Dues Cover: the Cub Scout Handbook, Rank Badges and other awards, Pack T Shirts for Scouts and Leaders, Pinewood Derby kit and awards, Blue and Gold Awards Banquet, Leader Registration Fees through 2021, Youth National BSA Registration Fees for 2021 ($66), and other program items.]
Invitation Manager is a tool where the leads – families who indicate they want more information about Scouting through BeAScout – will come in for your unit to contact. These are people who really want to get involved, they are just waiting for you to contact them and let them know more about your unit.

Invitation manager can also help you manage leads that come in through joining nights or through personal invitations to join. I’ll show you how to do this in a minute.

(click)
Invitation Manager: Who has Access?

Unit positions that have full access to the Invitation Manager Dashboard to add leads, manage inquiries from prospective Scouts, and send joining invitations:

- Chartered organization representative (CR)*
- Committee chair (CC)*
- Unit leader (Cubmaster, Scoutmaster, Crew Advisor, Skipper, Coach)*
- Institutional Head/Chartered Organization Executive Officer (IH)
- Key 3 Delegates
- New Member Coordinators

* = Members of the Unit Key 3

The Unit Key 3 can assign a “Registration Inquiry” functional role to other unit volunteers who need read only access to view lead status and submitted requests.

First I want to help you understand the positions that can take action in Invitation Manager. These parties all have access to see and respond in this tool:

- The unit Key 3 (Chair, Chartered Organization Representative, and Unit Leader – Cubmaster, Scoutmaster, Crew Advisor)
- Any Key 3 Delegates (you get a maximum of three ... choose wisely!)
- any New Member Coordinator
- and the Institutional Head of the Chartered Organization (IH)

The Key 3 of the unit can also assign a functional role of Registration Inquiry which will grant view only access for submitted requests. This person will be able to see the request, but cannot sent the invitation or take an action in the tool.
Leaders in the unit – those who have the access – will see “Invitation Manager” in their drop down menu after they select the unit (some have more than one unit). (click)
“Knock Knock” from BeAScout – Families Contacting Your Pack

Clicking “Request More Information” Lands a Lead in “Invitation Manager”

Online Registration available for this unit.

Pack 631 has an ambitious outdoor program, with Pack events and/or Den Adventures every month, all around the Atlanta metro area - and sometimes beyond. Dens meet on days and at locations convenient to the families in the Den. Parent participation is leading our Scouts is key! During physical distancing due to COVID-19 concerns, the Pack and Dens will share ideas for family-centered events at times convenient for each family – and find ways to let each family share with others in the Den.

[Button: Request More Information] [Button: APPLY NOW]
Dear Bert Bender,

Thank you for inquiring about Pack 0631. The question/comment you submitted is: "Can you tell me about your pack?". I will try to supply the requested information below. Please let me know if you have any further concerns, so we can assist in welcoming you to Pack 0631.

Sincerely,

Albert E. Bender Jr.
Dear Me,

Thank you for inquiring about Pack 0631. The question/comment you submitted is: "Can you tell me about your pack?". I will try to supply the requested information below.

Information about Pack 631 can be found at [https://atlanta631.mypack.us](https://atlanta631.mypack.us).

I especially point out to you the piece on that homepage in the middle, with the headline **Pack 631 is Scouting On Safely with "Scouting on Demand"**, as that describes how our families will do Cub Scouting during the remainder of 2020.

Please let me know if you have any further questions, so we can assist in welcoming you and Test Case to Pack 0631.

Sincerely,

Bert Bender (404.307.9403)
And You Can … Send an Application

Button at Bottom Right

Age: 5  Grade: Kindergarten / Grade Prior to the First Grade
Contacted Organization: Pack 0631
Currently Assigned to Organization: Southern Crescent 30

Comment from Lead: What will be the meeting dates and times? Also, can I sit in on a meeting before joining?

Respond to Lead

Type your note...

Send Application

31
Parent Gets an Email + Link

Join the Boy Scouts of America!

Boy Scouts of America <boyscoutsofamerica@email.scouting.org>
To: Bender, Bert

If there are problems with how this message is displayed, click here to view it in a web browser.

Dear Bert Bender,

We're excited you're interested in building an adventure with Pack 0631 chartered by WOODWARD ACADEMY in Atlanta Area Council. In Scouting, you'll find dynamic and engaging programs that offer life-changing experiences in the areas of character development, leadership, citizenship, adventure... and not to mention fun!

The online application charges only for annual national membership fees of up to $66 for youth and $24 for adults, prorated based on the date of applications, and $12 for a 12-month Boy's Life magazine subscription. If your child has not previously been registered in Scouting, a joining fee of $25 will also be applied. This unit has additional fees of $130.

Please be patient. When you sign up using online registration, you'll pay for Cub Scout Registration directly to the BSA organization. To deliver the Cub Scout Program, the Pack also collects dues for other program costs, so assuming you've paid about $25 to registration fees, the remaining balance is $105.

Prepared For Life.
Also: Say “Hello” from Your Pack – Invite Families to Join

Clicking “+ New Lead” Creates an Invitation to Join

*But*: Hit “Send” Only When You Want to “Sign them Up”

- (if you want to send a “here’s what we do” or “join our sign up event” email, send that on the side)
Invitation manager is divided into several sections.

- The Top gives you a count of new leads (which came in via BeAScout) and opened leads (either from BeAScout and viewed or entered via Invitation Manager tool by click the New lead button).

- The Plus New Lead button (+ New Lead) allows you to enter leads directly into this tool and then send them an email with an application link.

- The status Summary shows how many leads are in the various statuses. Leads need to be marked closed or completed (which is the person has joined) manually.
  - You can click view and review the lead.

- All units have a unique QR code and Invitation Link which directs a lead to the online application.
  - These can be put on fliers or cards or websites or emails for use in recruiting.

- The bottom section lets search and filter all the leads.

FYI – if your Invitation Manager data seems odd (like references to leads that are not yours, or incorrect Invitation Links, like a Troop where it should be a Pack), click the back arrow, and come back in, and see if the site normalizes. This has happened – and a quick “back out” / “back in” solved the problem.
Click "+ New Lead" – now what?

Identify “Lead Source”:
- Joining Night, or
- Individual Lead, or
- Other

Enter Lead Information:
- Adult Name
- Email Address
- Phone Number

Scroll to the bottom, click:
- Save + Add Another, or
- Save, or
- Send Application

After you select add a new lead this screen will appear. You can select the lead source from the drop down menu. You can use this to enter individual leads that you get through word of mouth.

You can also use this at joining night as your sign in page if you have internet access where you are holding the rally. One of the Key 3 or Key 3 Delegates or New Member Coordinators would just log in to their My.Scouting account and open this page, select Joining Night as the lead source and then have the parent use the iPad or laptop to fill in their contact information (or pull it from a sign in sheet) and then ask them to select save and add another so that the next person can sign in. Before the meeting starts someone in the unit would close this form which will take them back to the Dashboard– they could filter by Joining night and select everyone in that status and send the invitation. Parents will get the invitation on their SMART phone and will be able to fill it out while they are attending the joining night or they can always fill out the paper application if they prefer to apply that way. If they apply online, one of the key 3 can go in and accept the youth applications as they are submitted and the applicant will leave the meeting having received their welcome email and their member number. These youth will appear immediately on the roster in member Manager.

(click)
Once you have leads in the system, you can review the lead information. You can add notes about any actions you have taken to contact the lead – this lets the others in your unit who have access to process leads know what you have done.

You can send an invitation.

You can reassign the lead to the district if there is some reason you cannot take the person into your unit.

Or, you can close the lead if the person turned in a paper application or if the person tells you they are no longer interested in joining. This will take them out of your actions and out of your reminder emails. Finally you can mark them complete which indicates they have joined.

(click) This is what the invitation generated by the system looks like. It will have the your program, your unit number and your chartered organization name in the first paragraph. The link will be specific to your unit – so anyone using this link will fill out an application that goes into your Application Manager tool where you can review and accept the applicant.
INVITATION EMAIL TEXT AS SET TO A "LEAD":

Dear <__name__>,
We're excited you're interested in building an adventure with Pack <__no__> chartered by <__name__> in <__name__> Council. Within Scouting, you'll find dynamic and engaging programs that offer life-changing experiences in the areas of character development, leadership, citizenship and adventure... not to mention fun!

The online application charges only for national membership fees and Boys' Life magazine subscription. This unit has additional fees of $<__no__>.

Please select the registration fee AND the subscription to Boys' Life. If you have more than one child in Scouting, please request only one Boys' Life subscription family. After you have made the payment via credit card and submit your child's application, Pack <__no__> will be notified.

To get started, please click the application link below:
Click here to start your application

If you need assistance in completing the application, please reach out to the Member Care Contact Center at myscouting@scouting.org or call (972) 580-2489, Monday through Friday from 7am - 7pm Central Time. We'd be happy to assist!

Once your registration has been processed, you will receive an email with contact information, and additional details about Scouting.

Thank you again. You've made a great choice! Let the fun and adventure of Scouting begin!

Prepared. For Life.

Here’s a larger view of the Message that will be received if you “Send Application” at Joining Night or any other time.
The digital application asks for the same information as the paper application. It just presents it in a format that is easy to fill using a digital device.

(click)
There are three ways that a family who wants to join Scouting can access the online application.

- One way is through BeAScout which is a web portal that allows parents to input a zip code and find nearby units.
- The other two ways are initiated by unit:
  - through a URL that is attached to an email or posted on a website
  - or through the use of a QR code which I just showed you how to access in the Invitation Manager tool.

(click)
When a parent scans the QR code or opens the URL link that is emailed, or selects the Apply Now button in BeAScout they will see the create account and login screen.

- Yes, they will be asked to create an account.
- Ask them to write down their Login Username and Password.

Here they can select New to Scouting if the child has never been in Scouting.

If the child has been in Scouting before and is returning after a lapse in membership they can also go in, using their member number, and register through this system.

Once they have an account it will take them directly to the application.
This is the format as the screen appears for the parent or volunteer in creating an account. Format may have changed. (click)
Youth or Adult?

WELCOME TO SCOUTING

Select your application type below to apply for membership in or to volunteer for Scouting. You will be notified when your application has been processed by the unit or council.

Are you registering yourself or your child?:

Youth
Age 5 - 16 years old
Start

Adult
Volunteers
Start

Now they choose the youth or adult application. (click)
We want to know if BSA already has this person in our system so if they answer yes to being a current or former scout we ask for the member id.

(click)
“Transfers” and “Multiples”

Can you use Online Registration to:
• **Transfer from one Unit to another?** (Pack to Troop)
• **Join a Second Unit as a “Multiple”?**
  – Yes! So, stay on the old unit Charter for 2020, join the new Unit.

New for 2020
(click)
And then complete the application – steps 1 & 2 is entering information, (click)
And then complete the application – steps 1 & 2 is entering information, (click)
step 3 is agreeing to the Terms and Conditions, (click)
step 4 is check out – this image is NOT from 2020, prices have gone up (click)
step 5 is payment – in the Atlanta Area Council, on-line applications can only be made with Credit Cards ... for cash or check, a paper application is needed. (click)
Now let's look at the tool where you can review and accept applicants.
(click)
The positions that can take action in this tool are governed by the BSA By Laws and Rules and Regulations. Therefore, only the Key 3 or the unit can take action in this tool. You can give others “Registration Inquiry” function where they can view applications, but they will not be able to take action since they are not allowed to approve applications.

The Chartered organization representative and the Executive Officer/Institutional Head are the only persons who can accept an adult applicant.

If the unit elects to turn on the “CC Recommendation” configuration in the tool. The Committee Chair will have the responsibility to review the adult applications and assign the adult position. The CR will still need to accept the adult in the system after the CC assigns the position.

Any one of the unit Key 3 can accept a youth applications, However, the Unit leader has the primary responsibility for youth approval.

(click)
When you log in to your My.Scouting account and select the drop down menu you first need to select your unit name and then (if you have access) “Application Manager”.

(click)
That will take you to your Application manager dashboard. (click) You will see a Pending summary of the applications in progress by status– remember that all applications will time out if you don’t accept them within 60 days. Those applications close to timing out can be identified easily in the Alerts graph. Note, the clock does not start over with each action you take in the system – it starts the day the applicant presses the submit button until you take some type of action that completes or closes the application.

At the bottom of the screen you can search for specific applications or filter by status. In addition you can draft an email to a particular applicant.

You select the name of the applicant and open the record to view the information and take action on the application.

(}
When you open an application you will see the actions that you have available at the bottom of the screen. You can accept the applicant, reassign the applicant to the district so the district can find another unit for the applicant, return the application to the applicant because you want additional information, or you can recommend this person not be accepted in Scouting. We will go over each of these actions in more detail.

First let’s review the application. You can open the Basic Information or Background Information on the application by clicking on that section in the bottom part (click)
After you have reviewed the application and you know you want this youth in your unit you can press the accept button and they will move to completed status if they have paid by credit card and they will be on your membership roster in My.Scouting. They will also receive a welcome email from the National Service Center and – if your unit has elected to do so in My.Scouting “Organization Manager” for your Unit – they will also receive an auto generated welcome email with your units message.

(click)
When you open an application you will see the actions that you have available at the bottom of the screen. You can accept the applicant, reassign the applicant to the district so the district can find another unit for the applicant, return the application to the applicant because you want additional information, or you can recommend this person not be accepted in Scouting. We will go over each of these actions in more detail.

First let’s review the application. You can open the Basic Information or Background Information on the application by clicking on that section in the bottom part (click)
The Basic Information or Background Information on the application for an adult it will show you the information you need to understand this applicants background and his references. At the top you have the Application ID number for this applicant.
From the summary page you can also download an application (click).
From the summary page you can also view and download the invoice (click).
After you have reviewed the application and you know you want this youth in your unit you can press the accept button and they will move to completed status if they have paid by credit card and they will be on your membership roster in My.Scouting. They will also receive a welcome email from the National Service Center and – if your unit has elected to do so in My.Scouting "Organization Manager" for your Unit – they will also receive an auto generated welcome email with your units message.

(click)
Who Can Accept?

Required:
• Chartered Organization Representative

Optional:
• Also Committee Chair
• Settings are in Organization Manager

New in 2020:
• Chartered Organization Representative may appoint a “COR Delegate” to Approve for the COR
• Must be a Registered Leader
• Be sure to be in communication with your COR

(click)
When you select “Accept” on an adult application a screen will appear for the committee chair or the chartered organization representative, depending on how the unit set their configurations, so that they can select the adult position in the unit. Once the position is selected and saved, the Chartered Organization representative can complete the acceptance of the adult application.
The application moves into a Completed status and the buttons no longer appear at the bottom. (click)
If you select reassign, you will be asked to give a reason that you are not accepting this youth or adult into your unit. You will select from a drop down list. The application will then be forwarded to the district for one of the district Key 3 to reassign to another unit. If you look in the Pending Reassignment View tab and click on the application (click) you will see the application in Pending reassignment status until someone at the district takes action.

(click)
If you select do not accept this means that you are saying they should not be accepted into any Scouting unit. You will be asked to confirm this selection. You should not give your reason on this screen – if the council has questions they will contact you for further explanation. This moves the application to the council in a Pending Review status.

(click)
Sometimes the unit might want a little more information from the applicant, so there is a way to return the application and write a short message explaining the additional information you need from the applicant. When confirm the message, an email will be sent to the applicant asking for the additional information. If you do not hear back from the applicant, you may want to follow up by other means to ensure the application is processed within the 60 day time period. When the applicant has answered then the status changes from Pending Applicant Response back to Pending Acceptance and a new button appears Response Received. Click on this button and Confirm.

(click)
If you are accepting an adult and they answered “Yes” to any of the screening questions, you will see that in the application summary. Before you can accept this person, the COR will have to review the responses and (click) check that they acknowledge the responses. After you have acknowledged the application will move to the council in a Pending Acknowledgement status for their review. (click)
https://www.scouting.org/resources/online-registration/ provides online training and guidebooks that provide step by step instructions. There are also other resources such as frequently asked questions that you may also find helpful.

(click)
Questions??