

Unit and Member Renewals

Cardinal District Roundtable – October 3, 2024

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Occoneechee Council

Unit and Member Renewals

The information provided is offered to unit leaders to assist with Unit Renewals for 2024.

This presentation was presented at Cardinal District Roundtable on Thursday October 3, 2024

There are only reference links to Member Renewal.

This information is for Unit Renewal.

It was developed based on information available on Oct 3, 2024.

We recommend to use this only as a guide and seek out more up-to-date information as it is made available.

Scouting
America™
Occoneechee Council

Unit and Member Renewals

Preparation Steps to do before November 1st

- Scouting America Vocabulary
- Understand Time Tables and Deadlines
- Complete Unit Inventories
- Identify and make registered position changes
- Identify who can and who will do unit and member renewals
- Complete Unit Renewal FIRST.
- Complete Member Renewal SECOND (last). Start after unit renewal is complete, and finish no later than current expire date.

<https://ocscouts.org/renewal/>

Occoneechee Council

Unit and Member Renewals

Scouting America Vocabulary

- **National Council:** Business entity that provides services and support for the Scouting program. National Council annually charters with Local Councils. Legally named, “Boy Scouts of America”, dba, Scouting America (officially on 2/8/2025)
- **Local Council:** Business entity that charters annually with the National Council of the Boy Scouts of America. They provide services and support for the Scouting program. Based on specific geographic areas. Councils offer “charter agreements” to Chartering Organizations within their territories. Council have professionals with unique support roles to assist Units with running the Scouting program.

Occoneechee Council

Unit and Member Renewals

Scouting America Vocabulary

- ***District***: One or more geographic areas, within any specific Local Council. Occonechee has 4 Districts; Cardinal, North Star, Eno River and Sandhills.
- ***District Committee***: Group of experienced District Scouters that provide support and services to Units.
- ***Unit***: Generic name for a Pack, Troop, Crew, Ship, Post, Club, etc. A collection of Units make up a District.
- ***Volunteer***: Generic name for any registered Scouter that is not paid by either the Local Council or National Council to provide the Scouting program.

Occonechee Council

Unit and Member Renewals

Scouting America Vocabulary

- ***Executive Officer / Institutional Head***: Not normally active in Scouting, they appoint the COR. Only position not required to take YPT unless they are also registered in another paid position. Free registration.
- ***COR***: Chartered Organizational Representative – Top Unit Scouting volunteer for any Unit who charter through a community organization. One of the “Key 3” leaders.
- ***CRU***: Council Registered Unit Representative – Peer registration to a COR, if the unit is registered through the Local Council. One of the “Key 3”
- ***Committee Chair***: Top leader of the unit committee, one of the “Key 3”
- ***Unit Leader***: Top leader of the unit’s youth facing adults, member of “Key 3”
Example: Scoutmaster, Advisor, Skipper, Cubmaster, etc

Unit and Member Renewals

Scouting America Vocabulary

- **Key 3 plus 3:** Any Key 3 leader can configure up to three additional leaders in their unit with this functional position. They are given access permissions equivalent to the Key 3.
- **COR/CRU Delegate:** The COR or CRU can configure one other leader in their unit with this functional position. This person are granted access permissions equivalent to the unit COR or CRU.
- For the purposes of Unit and Member Renewals, there might be seven leaders that should have access to complete these processes: Key 3, Key 3 plus 3, or the COR/CRU Delegate. Unofficially, these might be referred as the “Key 7”.
- However, we assume only the Key 3 will have access

Unit and Member Renewals

Scouting America Vocabulary

- *Recharter*: Deprecated term for the previously combined unit and member renewal process, done annually. Phase out using this term.
- *Unit Renewal*: Previously known as “recharter”. Process and paperwork between Chartering Organization and Council, to mutually agree to engage in the Scouting program for a new year. Unit Renewal is step 1 of 2, to renew charter agreement only between Council and any Scouting Unit. Done once annually at the unit’s anniversary date.
- *Member Renewal*: Previously part of “recharter”. Member Renewal is step 2 of 2, to formally add or remove unit members for their next annual registration. Done annually, for each and every member, during their unique anniversary month. Each member has a unique anniversary month.

Unit and Member Renewals

Scouting America Vocabulary

- *MYST*: abbreviation for member website, <https://my.scouting.org> This is the starting portal for access to Unit membership information and personal volunteer account information.
- *Member ID or “MID”*: A unique, 7, 8, or 9 digit number assigned to every current or former Scouting member. Previously called Person ID or “PID”. The MID is used to associate membership data, award records, training records, advancement records. MIDs typically do not match in different Councils for the same person. It is possible (and problematic) for the same person in the same Council to have two or more MIDs.
- *Council ID*: For all of Occoneechee Council we are “421”™
- *Unit Term*: Unit’s “fiscal year”, example: Jan 1, 2024 to Dec 31, 2024
- *CBC*: Criminal Background Check

Unit and Member Renewals

Scouting America Vocabulary

- **Registered Position Name:** One of many registration positions a member can be assigned. Examples: Scoutmaster, Committee Chair, Den Leader, Youth Member, etc. During member renewals, member are registered for at least one “Primary Paid Position”, in one unit.
- **Primary Paid Position:** The first registered position where a member pays their fees to register with Scouting.
- **Multiple (free) Position:** The second or more positions where a member can be registered at no additional annual fees.
- **Functional Position Name:** One of many roles a primary or multiple member can be assigned, after they are registered. Examples: Key 3 Delegate, Registration Inquiry, COR Delegate. Assigned by a Key 3 Leader.

Unit and Member Renewals

Scouting America Vocabulary

- ***Expired Registration:*** Any registration that was not renewed, by mistake, after the expiration date.
- ***Dropped Registration:*** Any registration that was not renewed, intentionally by the expiration date.
- ***Lapsed Registration:*** Any dropped or expired registration is held for two months after the expiration date.
- ***Suspended Registration:*** A member's entire list of registered and functional positions will be suspended if their YPT expires. To restore a suspended membership, they must complete all YPT modules AND notify Council Registrar by providing an emailed copy of their updated YPT certificate. Suspended registrations do NOT appear on unit rosters.

Unit and Member Renewals

Occonechee Specific YPT related member suspension

- April 23, 2023, Occonechee Council board passed a YPT Compliance requirement for all registered adult members. [LINK TO PROCEDURES](#)
- Council will review all YPT expire dates monthly – Any member with expired YPT will be an email notice, advising to renew.
- Members who ignore the email notice will have their entire registrations (all positions) “suspended”, and they are ineligible to participate in Scouting
- Key 3 leaders should LOOK FOR members who are MISSING from your rosters
- Once the member completes the YPT renewal, they must personally send a copy of their updated YPT certificate to Tiffany.Edmiston@scouting.org and request the suspension be removed from their record.

Unit and Member Renewals

Understand Time Tables and Deadline

<https://www.scouting.org/resources/unit-and-membership-renewal/> s

- Determine your Unit Term date. Located in MYST → Select Unit → Organization Manager → Unit Renewal
- Start Unit Inventory 3 months prior to Unit Term expire date.
- Complete Unit Inventory 2 months prior to Unit Term expire date.
- Update all member information that has changed.
- COMMUNICATE to all parents and leaders which of the 4 Member renewal method options you plan to follow.
- <https://ocscouts.org/renewal/> Provide Member Renewal info link as needed

Unit and Member Renewals

Complete Unit Inventories

- Unit Inventories are a process where all current unit membership are contacted and a determination is made as to whether or not they plan to continue in a registered position in that unit.
- Strongly recommend surveying (Google survey works well) all youth and adults for changes in their primary contact home address, primary email, and primary preferred phone number.
- Verify that continuing / renewing members age 18 and older, are reminded to update their YPT if it will expire before the last day of their future registration expire date.
- Get adult applications for any youth who have recently or will soon turn age 18

Unit and Member Renewals

Complete Unit Inventories

- Verify all required position specific training is current
- Compare and update as required any primary address, email and primary phone information is incorrect.
- Should be fully complete 2 months prior to Member Renewal dates.
- Part of your Unit Inventory is identifying if you have Unit members with Multiple registrations. Very common mistake is paying a primary registration in more than one unit, district, council, etc.
- If there is a chance a member is actively registered in another Council, prompt them to go to MYST → Manage Member ID and create the association with their other registration.

Unit and Member Renewals

Complete Unit Inventories

- How to export and download unit roster.
- Key 7 can go to MYST → Select organization → Roster → Export Roster
- Export to CSV (comma separated variables) or PDF
- Open CSV with Excel like program.
- Sort roster as needed to determine YPT dates, notify all that need to retake YPT
- Know that Scouting America currently requires biennial YPT renewals. That will change
- Know that Occoneechee Council requires your YPT not expire before your membership registration expire date. Essentially retake YPT annually.

Unit and Member Renewals

Identify and make registered positions change

- Know that it is important you make any registered position changes before you begin the Unit and Member Renewals.
- If you are planning to change Key 3 roles, committee, or assistance unit leader roles, do it no less and 7 days prior to beginning Unit and Member Renewals.
- Key 3 leaders have access to change roles without new paper applications:
Located in MYST → Select Unit → Organization Manager → Unit Renewal → Edit Positions (at the bottom)
- Edit Positions has two pages, Registered Positions or Functional Roles
- When changing the Unit Leader or Committee Chair, send an email to your District Advancement Chair advising of the change and effective date

Unit and Member Renewals

Identify who can and who will do unit and member renewals

- Key 3 leaders should have access to complete Unit and Member Renewals
- COR / CRU Delegate should also have access for Renewals
- The person that starts Unit and Member renewals should complete it.
- However, select and communicate which one of the key 3 will do this.
- Select a person that is "Tech Savvy" and has a modern computer!
- Avoid having more than one Key 3 volunteers doing renewal updates
- Update annual Council and Chartering Organization paperwork
- If applicable, get updated Facilities Use Agreements with signatures

Unit and Member Renewals

Complete Unit Renewal FIRST

- Unit Renewals should be done before any Member Renewal.
- The designated Key 3 doing Unit Renewals can complete the Unit Renewal starting 2 months prior to current Unit Term expiration. For most units, that would be November 1, 2024.
- Payment for Unit Renewal is \$100 annually. If paid online via credit/debit card, there will be a \$3 service fee. Please consider using this option. Alternatively, unit renewal paperwork can be printed, taken to Council office and paid via check or Council Scout account. Paying at Council requires staff to manually pay, and delays your Unit Renewal completion

Unit and Member Renewals

Unit Validation – Provide name of approving Key 3 leader

my.Scouting | Organization Manager

Pack 0288 St Vincent De Paul Catholic Church

1 Unit Validation 2 Payment 3 Confirmation

Unit Leadership

Chartered Organization Rep. Veronica Brown	Committee Chair Christina Hagan
Cubmaster Brandon Morris	Committee Member James Miller
Den Leader Jeffrey Schumaker	Executive Officer Jeffrey Schumaker

[Edit Positions](#)

Chartered Organization

Organization Name St Vincent De Paul Catholic Church	Executive Officer Jeffrey Schumaker
Unit Term Apr 1, 2023 - Mar 31, 2024	Unit Address 6000 Hill Road Cincinnati, OH 45241

Membership

7 Youth Members	0 Multiple Members
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Unit Renewal and Leadership Approval

I, , approve the rechartering of the above-named unit and leadership for the year.

[Click here for Pay at the Council Office Option](#) [Next Step: Payment](#)

Unit Renewal link becomes active 2 months prior to current Unit Term expiration date.

When active, a validation process will run to confirm required items, like is unit leadership correct, do all adults have current YPT, checks other unit related validations.

Unit and Member Renewals

Sample Unit Validation Error



	33 Youth Members	0 Multiple Members
Validation		
⚠ Charter validation results: 1 Error		
Error: Leaders do not have current Youth Protection Training		
Members Effected:		
<ul style="list-style-type: none">• [Name]• [Name]		
Unit Renewal and Leadership Approval		
I, <input type="text"/> , approve the rechartering of the above-named unit and leadership for the year.		

Example of a Unit Validation error – Most common error is one or more Adults not having current YPT. Other possibilities: Does not have required minimum leadership positions, Leaders are less and 18 years old, Leader does not have CBC Authorization, Adult does not have SSN on file, etc

Unit and Member Renewals

Validation Complete Example



Transfer in
Position Manager
Reports

Unit Renewal and Leadership Approval

I, Susan Adams, approve the rechartering of the above-named unit and leadership for the year.

[Click here for Pay at the Council Office Option](#)

[Next Step: Payment](#)

CONNECT WITH US: [f](#) [t](#) [@](#) [p](#) [v](#)

Example of a Unit Validation Complete. Click “Next Step: Payment”

Enter approving Key 3, then next to pay online, or print Unit Renewal Paper to take to Council to pay for Unit. \$100 + \$3 service fee.

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Unit and Member Renewals

Sample Unit Renewal Paper



Mecklenburg County Council 415
Apache 04
Pack 0288 (F)

Create PDF

Service Territory
Council
District
Organization Name
Date Document Generated

Service Territory 15
Mecklenburg County Council 415
Apache 04
Pack 0288 (F)
04/11/2024

Participating Organization
Executive Officer
Special Interest
Expire Date

St Vincent De Paul Catholic Church
Joseph Brannan
03/31/2024

Instructions:

Review your unit leadership and submit this form to your council office with the Unit Charter Fee before the 15th of the month.

Unit Leadership

Executive Officer	Committee Chair
Joseph Brannan	Christopher James Koenig
Cubmaster	Chartered Organization Rep.
Brandon Harris	Veronica Anselmi Alvarez
Den Leader	Committee Member
William Toliver	Veronica Anselmi Alvarez
	James David Miller

Unit Renewal and Leader Approval

I, _____, approve the rechartering of the above-named unit and leadership for the year.

Sign here

Unit Renewal Paper – Save a local copy. We prefer you pay online \$100 + \$3 – You will spent more than \$3 driving to Council – However, print this and take to Council. Please **NO LATER THAN** the first 30 days you are eligible for Unit Renewal. Unit Renewal needs to be complete prior to Member Renewal

Unit and Member Renewals

Online Payment Recap (1 or 2)

The screenshot displays the 'my.Scouting | Organization Manager' interface for Pack 0288 at St Vincent De Paul Catholic Church. The page is titled 'Renewal Order Status' and shows a progress bar with three steps: Unit Validation, Payment (current), and Confirmation. The 'New Charter' information includes an Effective Date of 04/01/2024 and an Expiry Date of 03/31/2025. The 'Unit Renewal Fees' section lists a Recharter Fee of \$100.00, a Subtotal of \$100.00, an Admin Fee (Credit Card - 3%) of \$3.00, and a Total of \$103.00. The 'Billing Information' section is set to 'Credit Card' and includes fields for Card Information: First Name (Susan), Last Name (Adams), Card Number (0000 1234 4113), Expiration Date (12/27), and CVV (411).

When you choose to pay online, this is a sample screen of the \$100 renewal fee and the \$3 service fee.

Units that pay at Council will require staff to manually complete their Unit Renewal, which may delay completion of Member Renewal

Unit and Member Renewals

Online Payment Recap (2 of 2)

Organization Manager

- Settings
- Unit Renewal
- Unit Pin
- Unit Dashboard
- Roster
- Transfer in
- Position Manager
- Reports

* Expiration Date: 12/27

* CVV: 411

* Email Address: mcreagh@scouting.org

BILLING ADDRESS

* Country: USA

* Address Line 1: 1325 W Walnut Hill Ln

Address Line 2: Address Line 2

* City: Irving

* State/Region: TX

* ZIP Code: 75038-3008

Save this card for future payments:

Submit Payment

When you choose to pay online, this is a sample screen of the \$100 renewal fee and the \$3 service fee.

Enter requested credit/debit card info and click “Submit Payment”

Unit and Member Renewals

Payment Confirmation

Once payment is made, confirmation is shown on screen and will remain there until next year, when it is time to renew unit.

The screenshot shows the 'my.Scouting | Organization Manager' interface for 'Pack 0288 St Vincent De Paul Catholic Church'. The top navigation bar is dark blue with the text 'my.Scouting | Organization Manager'. Below it, the pack name and a location icon are visible. The main content area features a progress bar with three steps: 'Unit Validation' (checked), 'Payment' (checked), and 'Confirmation' (highlighted with a red box and the number 3). Below the progress bar is a large orange dollar sign icon and the text 'Your payment is being processed. Please check back later for the status of your renewal order.' A 'Renewal Order Status' box contains the following information: Status: Submitted; Is paid: Yes; Created By: [redacted]; New Charter Effective Date: 04/01/2024; Expiry Date: 03/31/2025. A 'Back To Payment' button is located at the bottom left of the main content area. On the left side, there is a yellow sidebar with the Pack 0288 logo and a list of navigation options: Organization Manager, Settings, Unit Renewal, Unit Pin, Unit Dashboard, Roster, Transfer in, Position Manager, and Reports.

Unit and Member Renewals

Payment Confirmation

Payment confirmation also shows at the top of the renewal page one unit has made payment.

my.Scouting | Organization Manager

Pack 0288 St Vincent De Paul Catholic Church

Renewal Order Status
Status: Submitted
Is paid: Yes
Created By: [redacted]

New Charter
Effective Date: 04/01/2024
Expiry Date: 03/31/2025

1 Unit Validation 2 Payment 3 Confirmation

Unit Leadership Chartered Organization

Occoneechee Council

Unit and Member Renewals

Complete Member Renewal Last

- Member Renewals can begin once your Unit Renewal is completed and Paid
- Link to the four Occoneechee specific Member Unit Renewal options which are at: <https://ocscouts.org/renewal/>
- Link above lists the 2025 budget year Occoneechee Council Registration Fees
- Let your unit know which one of the four options your Unit chooses to follow
- Choose and COMMUNICATE to your Unit Members, that they will receive an email from the National Council 2 months prior to their membership expiration date. For a large majority, that will be on November 1st

Unit and Member Renewals

Member Renewals – Special Topics

- [Scout Assistance Application Form](#) ← Link to form that is required to be completed for every youth, who qualifies for registration and uniforming assistance.
- There is NO assistance available for Adult registrations (change for 2025)
- Units using Assistance Forms, must choose one of the “Pay at Council” Member Renewal options.
- Helpful FAQ with answers: <https://ocscouts.org/renewal-faq/>

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Unit and Member Renewals



Thank you!

Any Questions?

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