Internet Rechartering 2.0
User Guide
updated 9/12/2022
Internet Rechartering may be accessed by the Unit Leader, Charter Org Rep, Committee Chairman or Key 3 Delegate by logging into their Scoutbook.com or my.Scouting Account or directly at

https://advancements.scouting.org/

Note: Be sure to read all the instructions before beginning the recharter process and review the new Internet Recharter Guide and Timeline found at https://www.scouting.org/resources/internet-rechartering/
Once you have logged into your account, choose your Unit and Position by clicking the dropdown.

*Only those with a Key 3 (Charter Organization Rep, Committee Chairman, Unit Leader, or Key 3 Delegate) can work on recharter.

Click on Recharter to open your roster and begin the submittal process.
Select your recharter term.

Consult with your Unit Commissioner or Council Registrar before selecting another term other than 12 months. If you change the term later after information has been entered, any information previously entered will need to be inputted and uploaded again.
Once the roster is loaded, you may start editing the roster

- YPT - Red Exclamation Point – Youth Protection Training has not been completed and recorded in the person profile or the YPT has expired
- YPT - Green Checkmark – Youth Protection Training is current
- CBC Auth - Green Checkmark – New Criminal Background Disclosure has been received and recorded in the person profile
- CBC – Red Exclamation Point – New Criminal Background Disclosure has not been received
- Scout Life – Toggle off – No subscription has been added to the registration
- Scout Life – Toggle on – Subscription has been added to the registration
- No status – “- -“ – Not applicable (New Members, youth, and no fee adults)
Changing an adult leader position
You have the ability to change a position of a leader by clicking on the pencil icon. Choose the appropriate position within the drop down and click update information.

To edit a position - click the pencil icon to edit.

1. Click Member Type
2. Select Adult*
3. Click Primary Position
4. Select Position
5. Click Update Information button

* Participant is only for members over 18 earning youth advancement (e.g. a Venturing youth 19 years old not serving in an adult position).
After making changes, periodically throughout the rechartering process, click on Refresh Roster. Refreshing will update a person within the roster if they have taken YPT, registered online, or a registrar received a CBC during Internet Recharter process.
Adding an Existing Member of Another Unit

Click on Manage Members>Add New Member>Click Existing Member>Enter all required information>Click the Add Member button. The member will show a “+” by their name to indicate they are paying their registration fees in another unit. If they are paying their registration fees in your unit, click the checkbox by their name>Click Manage Members>Click Unmark as Multiple.

If they are an adult, be sure to add a signed adult application for the new adult member from another unit by clicking the checkbox by their name>Upload Document>Select a file of the application>Click Save
Adding a New Member

Click on Manage Members>Add New Member>Enter all required information>Click on the “+” sign next to Add Paper Application>Select the file and attach the application >Click the Add Member button.
1. Click Manage Members

2. Enter information in fields

3. Click the plus sign to attach application

4. Locate application to where it is saved, click open and the document will attach into the renewal

5. Click Add Member
Uploading a Group of Documents into the Renewal

A group of documents, preferably in a zip file, can be uploaded into the renewal. They are Adult and Youth Applications, Criminal Background Disclosure Authorizations, Youth Protection Training Certificate, CORI Form and PA background records. Select the individuals that you are uploading documents for by checking the box next to their name and click upload documents. A popup will appear and this is where you load the zip file of documents.

<table>
<thead>
<tr>
<th>Name</th>
<th>Gender</th>
<th>DOB</th>
<th>Address</th>
<th>Member Type</th>
<th>Position</th>
<th>Member ID</th>
<th>YPT</th>
<th>CSC</th>
<th>Boost Life</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brandon Hardy</td>
<td>M</td>
<td></td>
<td>1305 W Walnut Hill Ln, Video</td>
<td>Adult</td>
<td>Committee Member</td>
<td>12322546</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>$48.00</td>
</tr>
<tr>
<td>Joseph Montenay</td>
<td>M</td>
<td></td>
<td>1305 W Walnut Hill Ln, Video</td>
<td>Adult</td>
<td>Committee Member</td>
<td>11025012</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>$45.80</td>
</tr>
<tr>
<td></td>
<td>M</td>
<td></td>
<td>5075 Carras St, Irving</td>
<td>Adult</td>
<td>Executive Officer</td>
<td>11200021</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>$40.00</td>
</tr>
<tr>
<td></td>
<td>M</td>
<td></td>
<td>5075 Carras St, Irving</td>
<td>Adult</td>
<td>Chartered Org. Sup</td>
<td>112000671</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>$40.00</td>
</tr>
<tr>
<td></td>
<td>M</td>
<td></td>
<td>1520 W Walnut Hill Ln, Video</td>
<td>Adult</td>
<td>Treasurer</td>
<td>124150872</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>$45.80</td>
</tr>
<tr>
<td></td>
<td>M</td>
<td></td>
<td>1305 W Walnut Hill Ln, Video</td>
<td>Adult</td>
<td>Committee Chairman</td>
<td>11777774</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>$45.00</td>
</tr>
</tbody>
</table>
Promoting a Member

In order to promote a youth member to an adult, a youth member to a participant, or a participant to an adult, you must click the box next to the individual you would like to promote. Click Manage members and follow the instructions listed in this User Guide to first remove the person from the charter. Then add them as a new member with the “New Paper Application” option following the instructions in this User Guide to add a person. You will upload a new application, CBC (if applicable), and YPT (if applicable). The member id for the individual will remain the same.

Creating a Zip File for loading documents

If you are uploading a group of files, use your Zip File option by highlighting the documents, right click after highlighting the documents and select Send to and next select Compressed (zipped) folder. Once you have created the zip file and named your zip folder, choose the folder when clicking the Upload Document option.
Adding a Multiple

If an individual is paying in another unit, you have the ability to register them in your unit(s) as a multiple and no fee is collected. The unit listed as the multiple unit is the unit they through which they will be paying their recharter fees. If an individual is paying in a council level position, you have the ability to register them in the unit(s) as a multiple and no fee is collected by the unit(s).

Note 1: For those multiplying from a council position select “Non-unit Position”

Note 2: The Charter Org Representative is the only individual that can multiple in more than one position as a committee chair or committee member only. No other adult leaders can multiple in more than one position within the same unit.
Choose the Council that the individual is registered in and the unit type and unit number - Once you have selected the council and unit click the Mark as multiple button.
Invite New Member into the unit (Leads)

1. Select Invite New Member

2. Complete all fields and click on the Invite Member

An email is sent with a link to complete an online registration. Reminder: click on Refresh Roster periodically throughout processing your renewal. This will add any new online registrations into your unit. Once the invite is sent, they will appear on the Pending Members Tab.
You're Invited to Join Us!

Troop 0118 is waiting for you to join!

donna, you've been invited to join Troop 0118 and become a member of the Boy Scouts of America! To finish the joining process, please click the below.

https://myqa.scouting.org/VES/OnlineReg/1.0.0/?f=UF-MB-578taa0118

If you have any questions or concerns, please reach out to Troop 0118 directly.

We look forward to all the great things you will accomplish in your Scouting journey.
Edit Personal Information
Click Roster. Then the profile of the individual you would like to edit. Edit the information on the profile (for Scouts, click Scouts Info). Then click Recharter and Refresh Roster.
PERSONAL INFORMATION
 Prefered Name
 Date of Birth
 Gender

Please contact your council office for any changes on your personal information.

ADDRESS INFORMATION
 Home
 Business
 Vacation

Country: USA

Address Line 1: 1333 W. Walnut Hill Ln.
City: Prescott
Zip Code: 86305-5380

CONTACT INFORMATION
 EMAIL

Primary
 Email Address: csp@scouting.org

Add Email Address

PARENT
<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Gender</th>
<th>DOB</th>
<th>Address</th>
<th>Member Type</th>
<th>Position</th>
<th>Member ID</th>
<th>YPT</th>
<th>GBC-Auth</th>
<th>Scout Life</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Adult</td>
<td>Assistant Cub Master</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Adult</td>
<td>Tiger Cub Master</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Adult</td>
<td>Lion Adult Leader</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Adult</td>
<td>Tiger Cub Adult</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Adult</td>
<td>Tiger Cub Adult</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Adult</td>
<td>Tiger Cub Adult</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Adult</td>
<td>Tiger Cub Adult</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Adult</td>
<td>Tiger Cub Adult</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Adult</td>
<td>Tiger Cub Adult</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Adult</td>
<td>Tiger Cub Adult</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Remove From Recharter

Select the person whom you are removing. Click on Manage Members and select Remove From Recharter. A popup will appear and you will choose Remove. At that point they will be moved to the Removed Members Tab.
Adding An Individual Back Into The Recharter After Removing Them

You have the ability to add someone back into the renewal after removing them by clicking on the Removed Member Tab.

1. Click on Remove Member tab
2. Check the box next to the person you are adding back into the unit
3. Click Add to Recharter.
4. A pop up box will appear-click Add

Once you click Add, the youth or adult will move back into the unit. Click on Troop Roster tab and the roster should now reflect the add. Once added, click Refresh Roster and continue with renewal submittal.
Validate Recharter and Pay

Once you have updated your roster and attached the necessary documents, click Refresh Roster and then the Validate Recharter and Pay. A popup will appear that will display any errors or warnings. At that time you will need to review and correct the warnings and errors before you can continue with your renewal. The errors will have a red bubble next to them and the warnings a yellow bubble. If you receive a warning or error, you have the ability to correct and continue through the submittal process.

Once the error has been corrected within the roster, click the Validate Recharter and Pay button. If there are no errors and you have addressed the warnings and you are ready to submit your unit, click the Proceed to Payment button. If you have no errors or warnings and you may proceed straight to payment. You have the option to print your roster by clicking the "Print Roster" button above the search for Name or Member ID bar once you have validated all information and before you move to the payment page.
Once the error has been corrected within the roster, click the Validate Recharter and Pay button. The error should no longer appear in the popup and click Proceed to Payment.
Payment and Confirmation

During this process you have the ability to verify all fees and choose your payment option. The payment option is ACH ($1 fee), Credit Card (3% fee) and Pay at Council. If you pay at council, you will need to provide a form of payment to the local council in order to register your unit. Once you have chosen your payment option, click the Pay and Post Renewal button.
WePay, the payment processor, is the entity with whom ACH transactions occur. (BSA simply receives a confirmation or failure status for the transaction.) Your payment and charter will not be processed until your unit confirms their bank account.

To begin, you will receive an email after you select ACH and click “Pay and Post Renewal.” If you did not receive an email, be sure to whitelist or add support@wepay.com to your SafeSenders list through your email provider. (Also, check the email inbox of the individual submitting the recharter as well as the key 3).

Click the tiny link at the bottom of the modal which appears and asks you to select your bank.

Once clicked, the bank routing and account number will need to be entered. Following this step, a series of microdeposits will be made to the account entered. An email will be sent from WePay to the email entered as the payor information every day for 30 days, which will ask the user to click to a form where they will need to confirm the microdeposit amounts.

Once confirmed, the microdeposits will be reverted and the transaction amount – the full recharter amount – will be immediately withdrawn, and payment will be complete.

If payment fails, common issues include
- Bank was not confirmed within 30 days
- Bank refused the payment request
- Incorrect bank account information was provided
- Incorrect transaction amount entered for payment
- Insufficient funds in the bank account
Signature and Approval

After paying and posting the renewal an Adobe Acrobat Sign document will be sent to your NEW Key 3 (as entered on the recharter), COR Delegate, and Key 3 Delegate. Any of these individuals may sign the document if approval has been discussed with the Charter Organization Representative. It is preferable that it be signed by the Charter Organization Representative. Be sure to save and/or print the recharter renewal prior and after submittal. Once signed and payment has been completed, your recharter process will be complete for your unit.

Example of email sent to Key 3, COR Delegate, and Key 3 Delegate. Remember to save/print agreement

Example of recharter completed email after charter has been electronically signed sent to Key 3 COR Delegate, and Key 3 Delegate. Remember to save/print agreement