Updated Internet Rechartering

October 2019 – Version 9 of Internet Rechartering

NOTE: This presentation is for units that expire on December 31, 2019.

BOY SCOUTS OF AMERICA®

Internet Rechartering

Clicking on the link provided by your local council for Internet Rechartering brings you to this page. The first time you go in you must select Register.

Welcome and thank you for using Internet Rechartering from Boy Scouts of America. Internet Rechartering allows you to renew your unit's charter online and perform the following actions:

– Select members from your existing charter roster,
– Promote members from another unit,
– Add new members,
– Update member information, and
– Print a summary of costs associated with the new charter.

Before beginning Internet Rechartering, collect all member information, including new member forms with the appropriate signatures. To complete the process, you must be connected to a printer to print the final report for signature.

If you are a new user, you can consult this presentation for instructions on using Internet Rechartering.

New member applications
For additional adult or youth membership applications: Membership Applications.

REGISTER
First Time User

LOG IN
Returning User

Registration

To register for Internet Rechartering, enter the access code provided by your council, your unit type, and your unit number.

If you do not have the Access Code, please contact your council.

Access Code:

Unit Type: Troop

Unit Number:

CONTINUE

Login Page – Enter the Access Code provided to you in an email from BSA Registration to your Unit Leaders, Committee Chairs and Chartered Organization Representatives. Select the Unit Type from the Drop Down box. Enter your 4 digit unit number (include leading zeroes).

The Unit Processor enters their information and sets a password. (Sensitive information has been redacted)

Council: Troop 0141

1 ▸ Load Roster
2 ▸ Update Roster
3 ▸ Check Roster
4 ▸ Summary
5 ▸ Submit Roster

INTERNET RECHARTERING OVERVIEW

There are five stages in the Internet Rechartering process:

Stage 1 Load Roster	You choose whether to load the unit information either from the council or upload your unit record information from PackMaster or TroopMaster or TroopSoft.
Stage 2 Update Roster	You select the members you wish to renew, promote members, add new members, edit member information, and review the adult positions required in your unit.
Stage 3 Check Roster	Internet Rechartering automatically checks the roster against the BSA rules for membership. You make any corrections necessary.

ROSTER REVIEW

Renew: 0 Adult, 0 Youth
New: 0 Adult, 0 Youth

BEGIN

The stages to Internet Rechartering appear on this screen. You will progress through the stages until you have successfully entered all the information and all the BSA requirements have been met.

Load Roster – here you have the option of loading the roster from what is on record with your council, or you may load the roster information from another tool your unit may be using, such as PackMaster or TroopMaster.

Council: Troop 0141

1 ▶ Load Roster

2 ▶ Update Roster

3   Check Roster

4   Summary

5   Submit Roster

WELCOME TO STAGE 2: UPDATE ROSTER

To update your roster, you perform the following steps:

- Update chartered organization information.
- Review your chartered organization information and make any necessary changes.
- Select members for renewal.
- Promote members.
- Select members from another unit to become members of your unit
- Add new members.
- Add new adults and/or new youth to your roster.
- Update member data.
- Update the personal information about the members on your roster, such as birthday, e-mail address, or occupation.
- Update adult positions.
- Update the adult positions. Internet Rechartering will assist you in making sure each required adult position is filled.

To proceed to the first step, click **Next**

Please wait for the roster to load completely. This may take a few minutes, depending on the size of your unit.

ROSTER REVIEW

Renew: 0 Adult, 0 Youth
New: 0 Adult, 0 Youth

NEXT

Stage 2 is where you will update the information on your roster. There are several steps to updating the roster. Select Next when you are ready to begin.

If at any time you wish to stop, you select the gear in the upper right corner and Log Out. All changes you have made will be saved.

STEP 1 OF 6 : UPDATE CHARTER INFORMATION

Please review and update your chartered organization information.
When you have completed the changes, click **Next Step**.

Country: US

Address 1:

Address 2:

City:

ZIP code:

State:

NEXT STEP

ROSTER REVIEW

Review / Print Roster

Renew: 0 Adult, 0 Youth
New: 0 Adult, 0 Youth

UNIT INFORMATION

Unit type: Troop
Unit number: 0141
Unit expire date: 09/30/2017
District: Japeechen
Chartered organization:
Puckety Presbyterian Church

Unit term (months): 12
Unit new expire date: 09-30-2018

Sidebar:
1 Load Roster
2 Update Roster
- Update Charter Information
- Select Members for Renewal
- Promote Members
- Add a New Member
- Update Member Data
- Update Member Position
3 Check Roster
4 Summary

Council: Troop 0141

Enter the information relevant to the Charter Organization. (Sensitive information has been covered in this example.)

When finished select Next Step.
Notice the Review / Print Roster button.

Notice the Review / Print Roster button.

Council: Troop 0141

1. Load Roster
2. Update Roster
   - Update Charter Information
   - Select Members for Renewal
   - Promote Members
   - Add a New Member
   - Update Member Data
   - Update Member Position
3. Check Roster
4. Summary

STEP 2 OF 6 : SELECT MEMBERS FOR RENEWAL

Below is your current roster.

All members are selected for renewal. Deselect the **Renew** check box for any members not renewing. When finished, click **Next**.

Note: Non-paid members should be automatically selected to renew. Fee status will be determined later.

Renew	Name	Street Address	Adult	Position	Person ID
☑			Adult	1.Assistant Scoutmaster	
☑			Adult	1.Committee Member	
☑			Adult	1.Committee Member	
☑			Adult	1.Committee Member	

ROSTER REVIEW

Review / Print Roster

Renew: 0 Adult, 0 Youth
New: 0 Adult, 0 Youth

UPDATE UNIT ROSTER

Click **Update unit roster** to refresh unit member data and Youth Protection status from the council's unit roster information.

Update unit roster

PREVIOUS   NEXT

Follow the instructions on the page for selecting and deselecting members for renewal. (Sensitive information has been redacted)

It is important to refresh your roster if your unit has accepted a youth or adult through the online registration system or if your unit has submitted any paper applications to the council that are not showing in your roster. Be sure to update the roster each time you return to work on your recharter.

Council: Troop 0141

1 Load Roster

2 Update Roster

Update Charter Information
Select Members for Renewal
Promote Members
Add a New Member
Update Member Data
Update Member Position

3 Check Roster

4 Summary

STEP 2 OF 6 : SELECT MEMBERS FOR RENEWAL

Below is a summary of the members who will be renewed with your unit and the members who will not be renewed.

If the information is incorrect, click **Previous** to make corrections. When the information is correct, click **Next Step.**

NOTE: You will be able to add members and change member information later in the process.
Following members are selected for renewal.

No.	Name	Street Address	Adult/Youth
1.			Adult
2.			Adult
3.			Adult
4.			Adult

ROSTER REVIEW

Review / Print Roster

Renew: 0 Adult, 0 Youth
New: 0 Adult, 0 Youth

PREVIOUS   NEXT STEP

After deselecting members from the previous screen, only the members in your unit will show here. You may correct any incorrect information.

Council: Troop 0141

1. Load Roster
2. Update Roster
   - Update Charter Information
   - Select Members for Renewal
   - **Promote Members**
   - Add a New Member
   - Update Member Data
   - Update Member Position
3. Check Roster
4. Summary

STEP 3 OF 6 : PROMOTE MEMBERS

In Step 3 you have the option to Promote Members from another unit. To begin Promotions, click the **Promote** button. If you do not want to Promote anyone at this time, click **Next Step** to continue or click **Previous** button to return to Select Members for Renewal. When you have completed the Promotions process, you will be returned to this page.

When you click **Promote** you will see a Unit Selection screen that will display any units that are chartered to the same organization as your unit. If you are in a unit eligible to convert youth members into adult leaders (troop, team, crew, and ship only) you will see your own unit listed also.

By selecting the radio button shown below the unit you wish to view and clicking **Continue**, you will obtain the records available for this unit, if any. If you do not complete all promotions at this time, you will be able to return to this unit later. This process is available until your charter renewal has been submitted. You may select only one unit at a time.

If the unit from which you want to promote is not shown, you may access the unit's records by entering the correct Access Code, the Unit Type, and four-digit Unit Number into the fields provided. To obtain the Access Code you should contact the unit from which you will Promote Members. You may also contact your local council about this process if necessary. The entered unit must have the same expiration date as your unit.

ROSTER REVIEW

Review / Print Roster

Renew: 11 Adult, 11 Youth
New: 0 Adult, 0 Youth

UPDATE UNIT ROSTER

Click **Update unit roster** to refresh unit member data and Youth Protection status from the council's unit roster information.

Update unit roster

PREVIOUS   PROMOTE   NEXT STEP

Follow the instructions for promoting members into your unit from another unit. **Note you will need access codes for units in which you are not a member.** Notice that you will see a fee on the righthand side of your screen under Roster Review. This is a view of only the registration fees for youth and adult members, not your final fee for recharter.

Greater Niagara Frontier Council: Troop 0057

1 Load Roster

2 Update Roster

Update Charter Information
Select Members for Renewal
Promote Members
Add a New Member
Update Member Data
Update Member Position

3 Check Roster

4 Summary

5 Submit Roster

STEP 3 OF 6 : PROMOTE MEMBERS

This page has two parts. The first part presents a list of units from your community organization family from which you can promote members. You can only select one unit at a time. You may change your selection by clicking another radio button.

The second part allows you to promote members from a unit that is not in your community organization family. You must use the text boxes to enter the Access Code, Unit Type, and four-digit Unit Number and click the **Next** button. This unit must have the same expiration date as your unit. If you click a button for a unit in your community organization family, the text box option will disappear from the Screen. You can return to Promote Members later if you decide you require the text boxes or you want to select other units shown.

If your own unit is shown, it can be selected to promote an age-eligible youth member to an adult leader position (such as an 18-year old youth to assistant Scoutmaster).

Pack 0057 ○
Troop 0057 ○

If you want to promote members from a unit that is not in your community organization family enter the Access Code, Unit Type, and four-digit Unit Number for this unit and click the **Next** button. To be valid, the entered unit must have the same expiration date as your unit.

If you do not have the Access Code, please follow your council's instructions.

Access Code: [   ]

Type: [Pack ∨]

Number: [   ]

ROSTER REVIEW

[Review / Print Roster]

UPDATE UNIT ROSTER

Click **Update unit roster** to refresh unit member data and Youth Protection status from the council's unit roster information.

[Update unit roster]

Follow the instructions for promoting members into your unit from another unit. **Note you will need access codes for units in which you are not a member.**

[PREVIOUS]   [NEXT]

STEP 4 OF 6 : ADD NEW MEMBER

From this page, you can add new adults. When finished adding new adults, click **Next.**

To add new adult, please click here ->   **NEW ADULT**

ROSTER REVIEW

Review / Print Roster

Renew: 11 Adult, 11 Youth
New: 0 Adult, 0 Youth

UPDATE UNIT ROSTER

Click **Update unit roster** to refresh unit member data and Youth Protection status from the council's unit roster information.

Update unit roster

Council: Troop 0141

1 Load Roster

2 Update Roster

Update Charter Information
Select Members for Renewal
Promote Members
Add a New Member
Update Member Data
Update Member Position

3 Check Roster

4 Summary

PREVIOUS   **NEXT**

Here you may add a new adult.

Complete the information for a new adult.

Note the warning about the social security number. You will <u>not</u> be asked to enter a social security number.

Here you will enter the youth protection completion date for the adult. You will need to submit the signed completed application, YPT certificate, and any other supplemental documents the council requires.

Here you may add a new youth member.

STEP 4 OF 6 : ADD NEW MEMBER

ROSTER REVIEW

Review / Print Roster

Page 1 : Youth

Transfer to this Unit : ☐

First name :

Middle name :

Last name :

Suffix :

Country :   US   🔍

Address type :   Home

Council: Troop 0141

1. Load Roster

2. Update Roster
   - Update Charter Information
   - Select Members for Renewal
   - Promote Members
   - Add a New Member
   - ● Update Member Data
   - Update Member Position

3. Check Roster

4. Summary

CANCEL   RESET   NEXT

Enter new youth member information.

Council: Troop 0141

1 Load Roster

2 Update Roster

Update Charter Information
Select Members for Renewal
Promote Members
Add a New Member
Update Member Data
Update Member Position

3 Check Roster

4 Summary

STEP 5 OF 6 : UPDATE MEMBER DATA

Please scroll through your roster and ensure the personal information is correct. If the personal information is not correct, click the **Update** button to the left of the name.

When roster is complete, click **Next Step.**

Note: You will have the option to signup members for *Boys' Life* during the Update Fees stage.

Search

Make Update	Remove from Roster	Name	Birth Date	Address / Phone	Position	Boys' Life	YPT Trained	YPT Date
Update	Remove		02/01/1951		1.Assistant Scoutmaster	N	N	10/29/2014
Update	Remove		08/12/1977		1.Committee Member	N	Y	08/12/18
Update	Remove		06/15/1970		1.Committee Member	N	Y	08/20/18

ROSTER REVIEW

Review / Print Roster

UPDATE UNIT ROSTER

Click **Update unit roster** to refresh unit member data and Youth Protection status from the council's unit roster information.

Update unit roster

PREVIOUS   **NEXT STEP**

Here you have the opportunity to update information on your members. (Sensitive information has been redacted.)

Council: Troop 0141

1 Load Roster

2 Update Roster

Update Charter Information
Select Members for Renewal
Promote Members
Add a New Member
Update Member Data
Update Member Position

3 Check Roster

4 Summary

STEP 6 OF 6 : UPDATE MEMBER POSITION

Below is the list of required positions for your unit and information on who is filling these positions.

The Unit Adult Positions table presents a summary of required positions. The number in the **Current** column must be within the minimum and maximum requirements. To change the position(s) for an individual, click the **Update** button to the left of the individual's name.

When the Current column is within the min/max range, click **Next Step.**

Note: Quality Unit Recognition requires an assistant unit leader.

Update	Name	Unit Position
Update		Executive Officer
Update		Chartered Organization Rep.
Update		Committee Chairman
Update		Committee Member

ROSTER REVIEW

Review / Print Roster

UNIT ADULT POSITIONS

Position	Min	Max	Current
Executive Officer	1	1	1
Chartered Organization Rep.	1	1	1
Committee Chairman	1	1	1
Committee Member	2	-	7

PREVIOUS STAGE　　**NEXT STAGE**

Here you are able to see if you have the required minimum unit adult positions for your unit type. (Sensitive information has been redacted.)

Once you have made all your changes, you select Check Roster and your roster will be validated against the BSA unit requirements, including youth protection requirements of the members.

Council: Troop 0141

1   Load Roster

2   Update Roster

Update Charter Information
Select Members for Renewal
Promote Members
Add a New Member
Update Member Data
Update Member Position

3   Check Roster

4   Summary

CHECK ROSTER: ERRORS AND WARNINGS

ERROR:

Some of the unit information you entered contains one or more errors. An error is caused by information that falls outside the BSA's rules for membership.

Please investigate the source of these errors. You cannot complete the charter renewal process until these errors are resolved.

To go to the screen to correct the associated error or warning, click the chosen corrective action. Internet Rechartering will take you to the screen to make the correction.

After the errors are corrected, click **Re-Validate** to recheck the roster.

ERROR: ▮▮▮▮▮▮▮▮ does not have Youth Protection Training or Youth Protection Training is not current as of unit's new effective date. Reconcile Error Options:

- Click here to add/edit the Youth Protection Training for the unit registrant.
- Click here to remove the unit registrant from the renewal roster.

ROSTER REVIEW

Review / Print Roster

RE-VALIDATE

If there are any errors they are indicated on this page. (Sensitive information has been redacted.) Warnings are not the same as errors (as explained on the screen).

Council: Troop 0141

1 Load Roster

2 Update Roster

Update Charter Information
Select Members for Renewal
Promote Members
Add a New Member
● Update Member Data
Update Member Position

3 Check Roster

4 Summary

ADD/UPDATE MEMB

Page 1 : Update Adult

First name :

Middle name :

Last name :

Suffix :

Primary position in unit : Committee Member ▼

Position 2 : ▼

Position 3 :

Executive Officer
Chartered Organization Rep.
Committee Chairman
Committee Member
New Member Coordinator
Unit Scouter Reserve
Scoutmaster
Assistant Scoutmaster
Unit College Scouter Reserve
Unit Religious Emblems Coord
Unit Chaplain

ROSTER REVIEW

Review / Print Roster

RESET   **NEXT**

After selecting the member in error, you will be able to make changes to correct the error.   The unit processor will be able to modify YPT dates, but this must not be done without proper documentation.

Council: Troop 0141

1 Load Roster

2 Update Roster

Update Charter Information
Select Members for Renewal
Promote Members
● Add a New Member
Update Member Data
Update Member Position

3 Check Roster

4 Summary

ADD/UPDATE MEMBER

Page 2 : Update Personal Data for Glenn Matovcik
** Social Security number is required and will be entered by your council from the adult application.

Country :   US   🔍

Address type :   Home   ▼

Address 1 :

Address 2 :

City :

State :   PA   ◌

ROSTER REVIEW

Review / Print Roster

RESET   NEXT

Still updating the member in error.
(Sensitive information has been redacted.)

Council: Troop 0141

1 Load Roster

2 Update Roster

Update Charter Information
Select Members for Renewal
Promote Members
Add a New Member
Update Member Data
Update Member Position

3 Check Roster

4 Summary

CHECK ROSTER: ROSTER IS VALID

Congratulations!

The validation was completed without errors. Please click the **Next Stage** button to continue.

ROSTER REVIEW

Review / Print Roster

NEXT STAGE

All errors have now been resolved.

Troop 1257

1 Load Roster

2 Update Roster

Update Charter Information
Select Members for Renewal
Promote Members
Add a New Member
Update Member Data
Update Member Position

3 Check Roster

4 Summary

5 Submit Roster

CHECK ROSTER: SUCCESS

Thank you for beginning the unit renewal process from Internet Rechartering

You have made substantial progress by achieving **Check Roster** success.

Because Version 9 does not include fees, please return for **Version 10** <u>after</u> **November 1, 2019** to proceed with the next steps.

If you wish to make more changes to your roster at this time, you may. When you are finished, log out of Version 9 and close your browser.

All the changes saved in your roster, including the selection of persons to renew, updates to records, and new youth or adults added will be retained.

In Version 10 when you login as Returning User (have your Access Code and Password ready), please click **Update Unit Roster** at your first opportunity.

Update Unit Roster adds new persons that your unit has accepted since you were last online. You may do this update as often as needed. These new persons must be registered with your unit and Council.

In Version 10, you will complete the **Summary Stage**, where you may add *Boys' Life* subscriptions and complete an Inventory step, and go to the **Submittal Stage.**

The Submittal Stage includes optional Online Approval, Online Payment options, including paying directly to your Council by check, and the Submittal of your renewal.

You must Submit your renewal for the Council to process. Once you have done Submit, you will see a Survey form, and on the **Confirmation** page the Unit Renewal Report options and helpful forms.

Once again, thank you for using Internet Rechartering and for your service to youth.

| Update Charter | Select Members for Renewal | Promote Members | Add Member |
| Update Member | Update Member Position |

ROSTER REVIEW

Review / Print Roster

Renew: 4 Adult, 31 Youth
New: 0 Adult, 0 Youth

This is the <u>final</u> page - Version 9