USING APPLICATION MANAGER



OVERVIEW

To view and act on applications that have been submitted to your unit, you'll want to log in to my.scouting.org.



- Select your **unit name** in the dropdown list.
- Select Application Manager.

Application Manager Dashboard Overview

The top section of the dashboard provides a quick overview of application processing statistics over the last 60 days.

The application is tracked through the system for 60 days, after which the application is timed out and removed from the list. That is why the view is always of the last 60 days. This is to encourage units to take timely action.



The **Summary** section of the dashboard contains a list of the different statuses that the applications – can be in depending on the actions you have taken.

You will see the number of applications in each status in the blue circle to the left of the status.

Select **View** to display the unit's applications that are in that status.



16

fotal Applica

0000000

2

0 Days

6

6

The **Alerts** section of the dashboard shows you how long applications have been pending since they — were first submitted.

The **Applicants List** is at the bottom of the dashboard. This list contains the applications that have not completed processing. When you first open the dashboard, the list will display the applicants who have been in the que to longest.

Applicantions can be sorted by name and application status by using the arrows next to each column name.

Application Application	Closed Vis Completed Vis		
APPLICATION STATUS X	tion Status Search		
Pending Acceptance Pending Payment Application	Name ‡		
Pending Applicant Response Pending Refund	Hugh DAvidson		
Pending Reassignment Pending Acknowledgement	bruce Lennon		
Pending Applicant Agreement Closed			
Pending Review Completed			
	Billy Kidd		
□ ‡	Sydney Murden		
EAR OPTIONS SHOW RESULTS	Winston Churchill		
	Lionel Richey		

To **Search** for a specific individual, type the name in the search field.

	ClosedComplete	VIEN VIEN		
Y CON	Application	Status		VIEW COLOR MATRIX
Troop 0003	Q Sear	ch		
Mandamiliji Managar				🖬 Draft Ernall 🥃
Application		Name 0	Application Status 👙	
Invitation		Hugh DAvidson	Tending Acceptance	
Reports	0.2	bruce Lennon	Pending Acceptance	
	0 🗶	David Roberts	Pending Acceptance	
	0 🗶	April McMillan	Tending Acceptance	
	0 🗶	Patricia Wellen	Tending Acceptance	
		Billy Kidd	Pending Acceptance	
		Sydney Marden	Pending Acceptance	
		Winston Churchill	Tending Acceptance	
		Lionel Richey	Tending Acceptance	
	0.2	Kyle Wellen	Pending Acceptance	
			< 1 >	

To see the details of an application, just click on Application Status VIEW COLOR MAT the applicants name to open the application, Q Search 2 Application Summary Billy Kidd 2 * Kyle Weller 1

In this view, you can review parts one and two of the application.

If it is a record that you can act upon, you'll see the action buttons at the bottom of the screen.

To close the record and return to the main dashboard select Applications on the left-hand side of the screen.

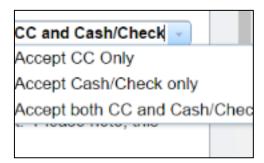
	Troop 0003	Arrusan	NIT 10. 3072.	TEN INTOICE		POST
	Meetherahip Manager	Review Ap	plication			Pending Acceptance
	Application	1	Youth Information		сом	PLETED
	Invitation Reports	L =				
	Reports	2	Guardian Information		сом	PLETED
		3	Terms and Conditions		COM	PLETED 🥝
		4	Checkout Summary		COM	PLETED 🥥
		5	Payment Confirmation		COM	PLETED 🥥
		_			DOWN	ILOAD APPLICATION
			ACCEPT	REASSIGN	URN APPLICATION DO	NOT ACCEPT

UNDERSTANDING PAYMENT OPTIONS

Payment options were set up by your unit Key 3 or the council as part of the system configurations. Options that were available include:

- Credit card only
- Cash/check only
- Both Credit and Cash/check

Your unit Key 3 can tell you which options your unit or council has chosen. If nothing was chosen, the system will default to accept cash/check only.



Pro-rated fees collected through online registration include only:

- Registration fees
- Boys' Life subscription fees

Unit fees are not collected by the system; however, a generic message about unit fees is included in the checkout screen. "Uniforms costs and other other resources are not included. There may be additional fees payable directly to your unit. Please contact your unit to learn more."

To the left is an example of the invoice an adult recieves upon submitting their application. You will see that this person has **paid by credit card** and shows a balance of \$0.00. The message also provides the adult with a link to Youth Protection training so that they can complete their training before they meet with youth.

<u>■ B</u> 5 0 † ↓ Ø +		Eth Intel Application - Message (HTML)	1.1	7 E - F X
THE MESSAGE ADDREPOR				* * · 2124 - F
West2254 OtoFit 46 AM				
Membership@scouting.org				
BSA Adult Application				
to receive				
Relation Policy 3 (nat Delete (1 years)		Reports 12/14/0008		
Of these are politions with how this message is displayed, club	Any fe view it in a web broken.			
🚖 Troop 0144 Flora Rotary International				
Print Weller Reserved Location: MR-140-13719-315				
Thank you for joining the Bay Scouts of Americal				
We're excited you've decided to build a Sconting ad	Ivesture with us. A copy of your invoice is included below.			
	everys as small with contact information and additional details also			
		ouths. Please <u>click here</u> to get started. Also, check with your unit leas	fer to find out if additional trainings are required	
Thank you again? You've made a great choice? Let the	a fan and adventure of Scouting begin!			
IN SCOUTS OF AMERICA				
These 0.044 Files Rotary International International Control of the Unit States Party Wellson 1325 W.Winter Fild Lin Jacson, TX 73030-3000 USA				
1 x Adult Membership Registration Fee () \$2.00 e	uth es as			
Toles, Peter 1 x IISA Scenting Magazine - NO FEE (§ \$6.00 or Toles, Peter				
Tiral Amount	\$2.00			
Authorization (ET138815)	\$2.00			
Total Paid	\$2.00			
Amount Day	\$2.00			
	-			
🚳 🙆 x1 🚞 🛛 🌖				- + + # D 10000

If the applicant chose the option of **paying by cash/check** the invoice will show an amount due. This is the amount the unit <u>must</u> collect from the applicant along with a copy of the email or invoice with the record locator.

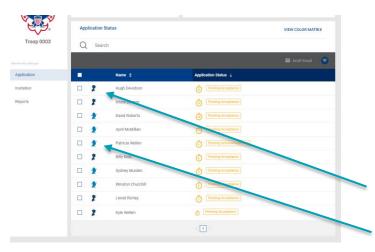
The invoice must be turned in to the

council along with the funds so that the council registrar can complete the payment process using the record locator found on the invoice.

UPDATE with Invoice showing amount due

		Page	1 of 1
		RECEIPT	
Applic	cation ID:	4841	
Trans	action Date:	November 3, 2018 11:22 AM	
Unit:		Crew 0003 Greensburg United Methodist Church	
	Boys' Life Domestic Rates	\$2.00	
	BSA Youth Registration (Trad.)	\$5.50	
	Total Amount:	7.50	

PROCESSING YOUTH APPLICATIONS



The position primarily responsible for accepting youth applications is the Unit Leader (Cubmaster, Scoutmaster, Coach, Venturing Advisor, Skipper); however, the Committee Chair and the Chartered Organization Representative can also accept youth applications.

Each application is identified as either that of a youth or an adult.

🔰 Youth

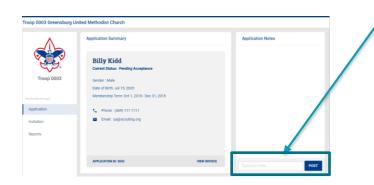
🕈 Adult

Click on the name of the youth applicant to open the application.

Troop 0003 Greensburg Un	rg United Methodist Church		
	Application Summary	Application Notes	An sec
Troop 0003	Billy Kidd Curret Status: Pending Acceptance Gender: Male Daret Status: Jul 5, 2005 Membership Term: Oct. 1, 2018-Dec: 31, 2018		Sec
Application	Phone: (469) 111 1111		
Invitation	Email: qa@scouting.org		
Reports			
	APPLICATION ID: 3692	Type your note POST	
	Review Application	Pending Acceptance	
	1 Youth Information	COMPLETED	
	2 Guardian Information	COMPLETED	
	3 Terms and Conditions	COMPLETED 🔗	
	4 Checkout Summary	COMPLETED	
	5 Payment Confirmation	COMPLETED 🥥	
		@ DOWNLOAD AT A STATE	
	ACCEPT REASSION	RETURN APPLICATION DO NOT ACCEPT	>

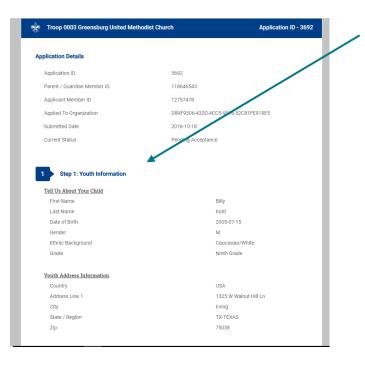
An Application Actions window appears. The main sections are:

- Application Notes you can add notes here so that others in your unit who have access will know what you have done.
- 2. **Application Summary** shows basic detail from application and displays the Invoice so you can see if payment has been made online.
- Review Application allows you to see the information on the application before you accept the applicant or move them to another status.
- 4. **Application Actions** this is where you accept, reassign, or do not accept the applicant.



To **add a note**, click in text box, type your message and **click Post**. Whatever is entered here becomes an official and permanent part of the application records.

Your note will be added, along with your login information and the date. These notes are sorted oldest to newest. Notes allow others in your unit who can take action or who have viewing rights to know what has been done.



When you choose **Step 1** in the **Review Application** section, you will see a screen like the one to the left. Here you can view the details about the youth, parent, and the Lion or Tiger adult partner.

Apleator Twine Apleator Twine Apleator Instator 1 non information Spring 2 Garden Information 1 non information COMPLETE 2 Garden Information COMPLETE 3 Trem and Conditions COMPLETE 3 Trem and Conditions COMPLETE 3 Papert Continuation COMPLETE 4 Contraction COMPLETE 5 Papert Continuation COMPLETE 4 Contraction COMPLETE



When you accept an applicant:

If the new member has already paid their fees online, the system will automatically email them their onboarding materials and assign them to your unit. You have no further action to take besides welcoming them to your unit.

If the new member has not paid their fees online, they will be moved to **Pending Payment** on the **Summary** section of the application dashboard and they will continue to show up on your daily summary.

- You will need to follow up with the family and get their invoice and payment. The invoice has their application id.
- Turn in the invoice and the registration fee that is stated on the invoice to the council so that the registrar can post the payment and finish the registration process. (The unit cannot prorate or change the fee on the invoice.)
- If the family does not turn in the invoice, you can print it by going to Payment

Pending and selecting the applicant name and then invoice.

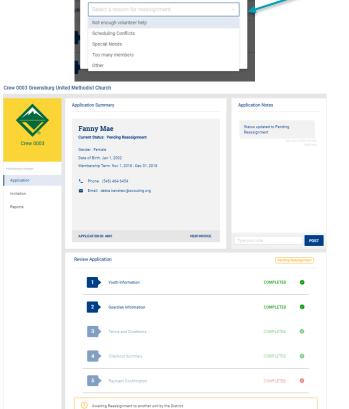
It is important to point out that the 60-day clock for processing an application does not reset, it just continues. So, you need to follow up on receiving the payment before this clock stops at 60 days.

If you receive an application, and your dens have too many boys and you cannot create another den, or if the applicant decides that your unit is not the right one for them, you will need to click **Reassign**. Don't forget to add any notes before you click on Reassign.

Select a reason for the reassignment request from the list provided. This will be used for reporting purposes.



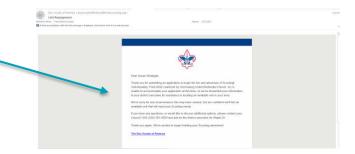
REASSIGN APPLICANT





Once you have selected the reason, click **Confirm** and the application will be moved to Pending Reassignment status in your Summary section of the application manager dashboard. And, the application will be sent to the district to reassign to another unit.

The applicant will receive an email message letting them know that the unit has reassigned their application to the district. It also contains the council contact information so that the applicant can follow up with the council.



Mandorship Manager	Review Application	Pending Acceptance
Application	1 Youth information	COMPLETED 🥝
Invitation	-	
Reports	2 Guardian Information	COMPLETED Ø
	3 Terms and Conditions	COMPLETED
	4 Checkout Summary	COMPLETED
	5 Payment Confirmation	COMPLETED O
	٥	DOWNLOAD APPLICATION
	ACCEPT REASSION RETURN APPLICATION	DO NOT ACCEPT

The final option you have for Youth applications is **Do Not Accept.**

If you identify an applicant you recommend for Do Not Accept, select the application record and click **Do Not Accept**.

ON	(!) ×	If you select Do Not Accept you will receive a warning message like the one on the left.
pli	DO NOT ACCEPT By selecting this option, you are recommending to the Council that the applicant not be accepted into any Scouting unit. The Council may contact you to clarify your reasoning for making this recommendation.	Do not record the reason for your decision in the Application Notes . That should be a conversation between you and the council.
pplication eports	Review Application (Pentry Rowan)	Click Confirm (clicking X will return you to the applications for you to choose a different action).
epor to	Countian Information COMPLETED Terms and Conditions COMPLETED Construct Summary COMPLETED	After you click confirm, the status will change to Pending Review and a status message will appear at the bottom of the application detail.
	Pyrymeti Confirmation COMPLETE Pyrymeti Confirmation This application was assigned to the council for the following reason: Do Hol Accept. No Action is available. Awaiting Council decision	Close the application by selecting applications on the left-hand side of your screen.

If you need to return to the application for any reason, it will be available under the **Pending Review** status in the Summary section of your Application Manager dashboard until the Council takes action.