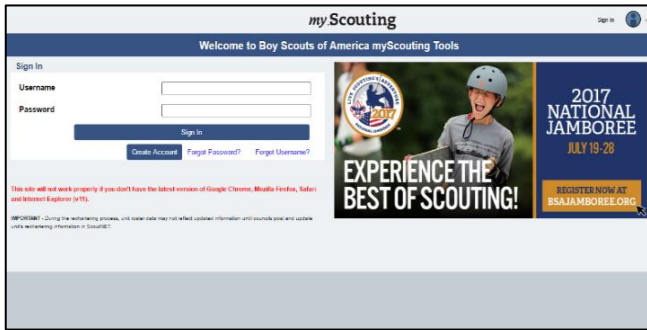
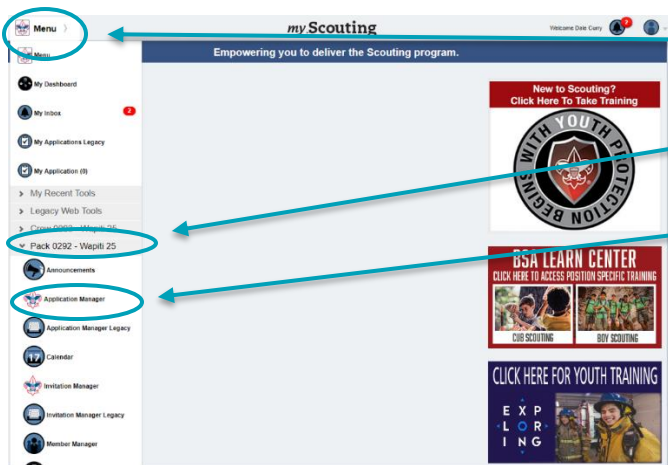


USING APPLICATION MANAGER



OVERVIEW

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

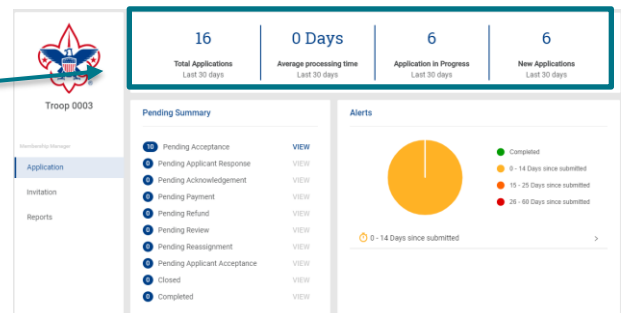


- Select **Menu**.
- Select your **unit name** in the dropdown list.
- Select **Application Manager**.

Application Manager Dashboard Overview

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

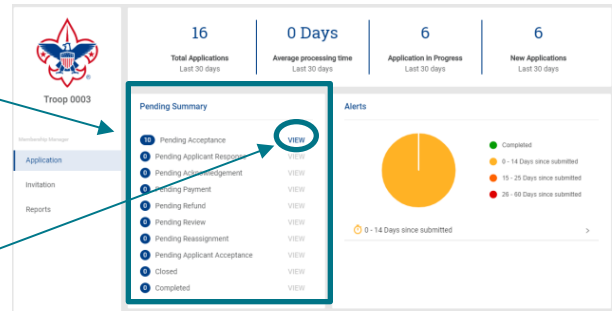
The application is tracked through the system for 60 days, after which the application is timed out and removed from the list. That is why the view is always of the last 60 days. This is to encourage units to take timely action.



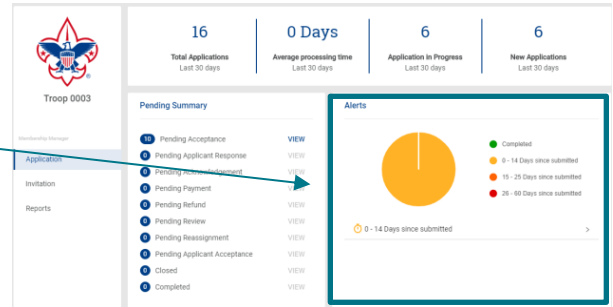
The **Summary** section of the dashboard contains a list of the different statuses that the applications can be in depending on the actions you have taken.

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.

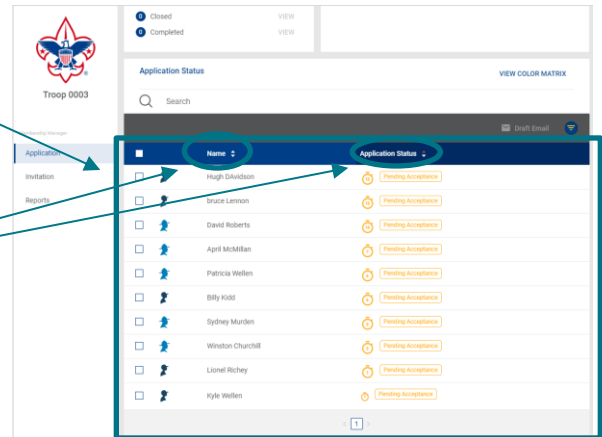


The **Alerts** section of the dashboard shows you how long applications have been pending since they were first submitted.

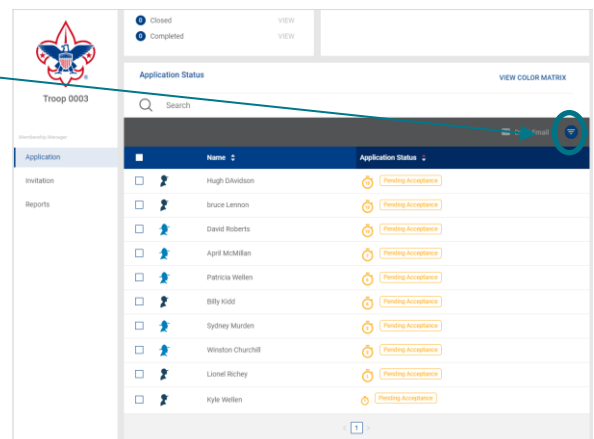
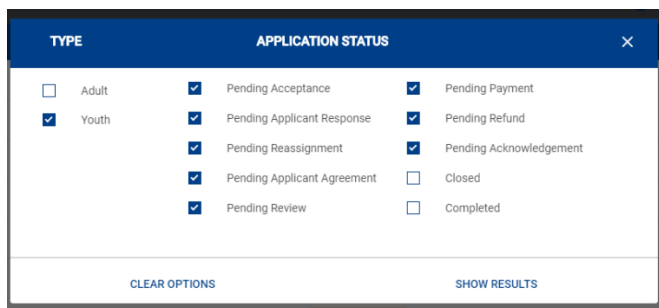


The **Applicants List** is at the bottom of the dashboard. This list contains the applications that have not completed processing. When you first open the dashboard, the list will display the applicants who have been in the queue to longest.

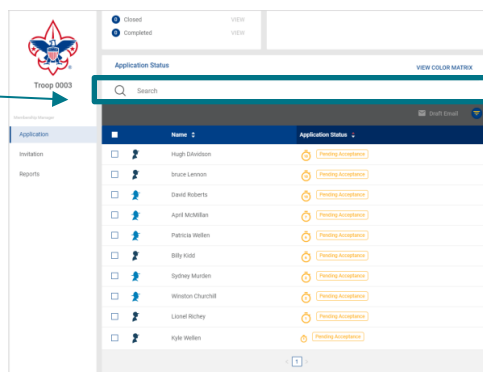
Applications can be sorted by name and application status by using the arrows next to each column name.



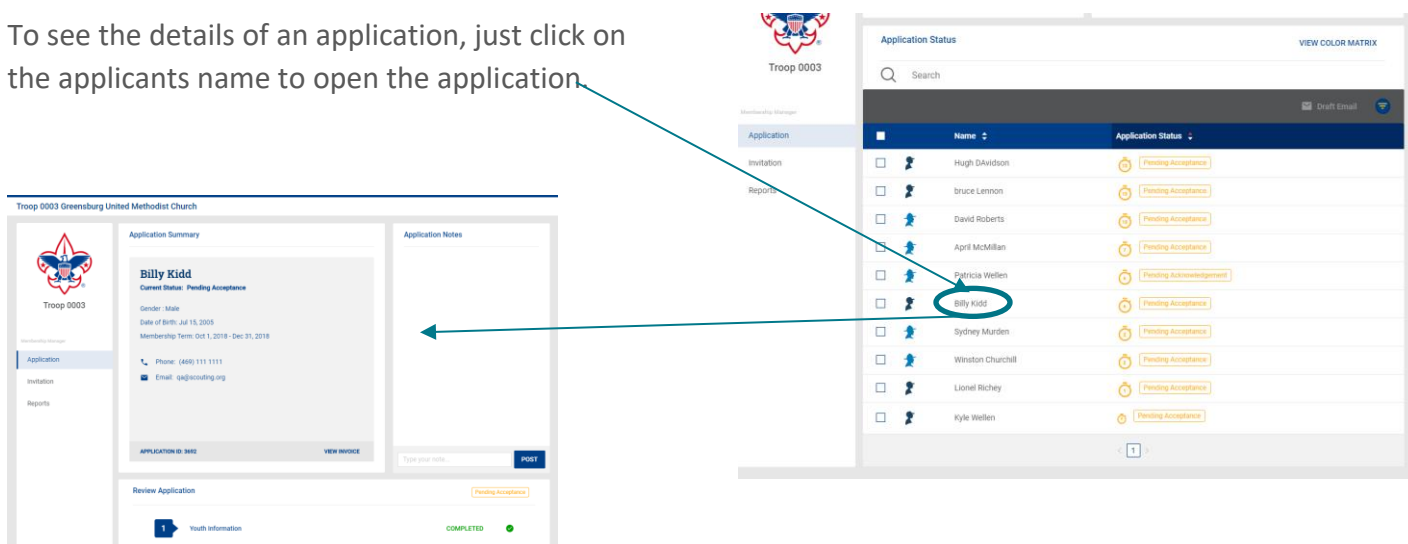
You can also **Filter** applicants by:



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



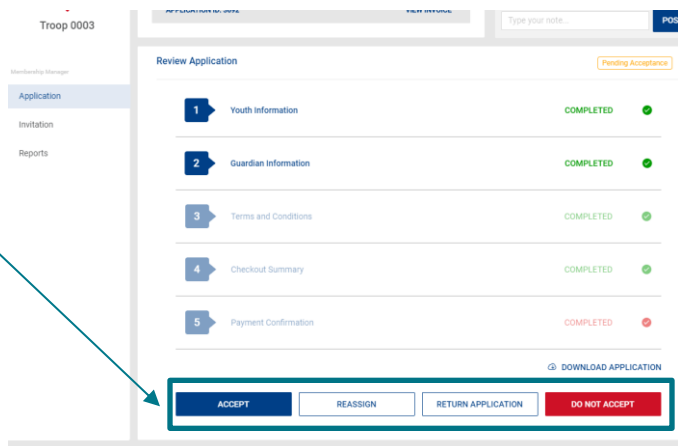
To see the details of an application, just click on the applicants name to open the application.



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.

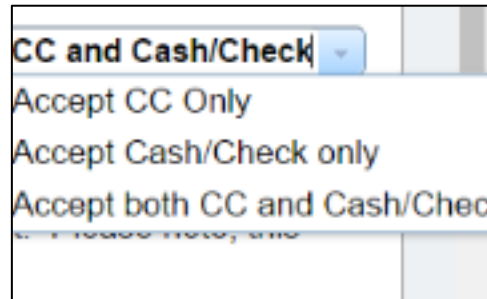


UNDERSTANDING PAYMENT OPTIONS

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

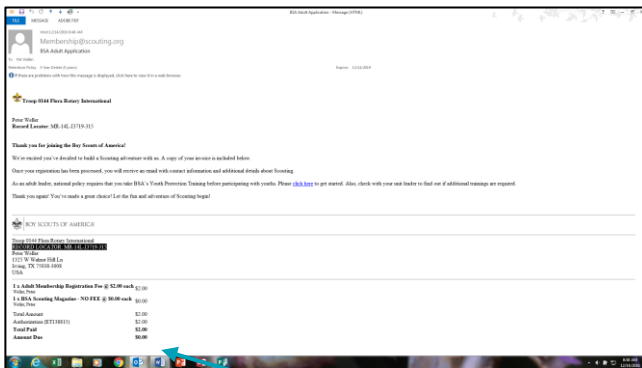
Your unit Key 3 can tell you which options your unit or council has chosen. If nothing was chosen, the system will default to accept cash/check only.



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 receives 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.

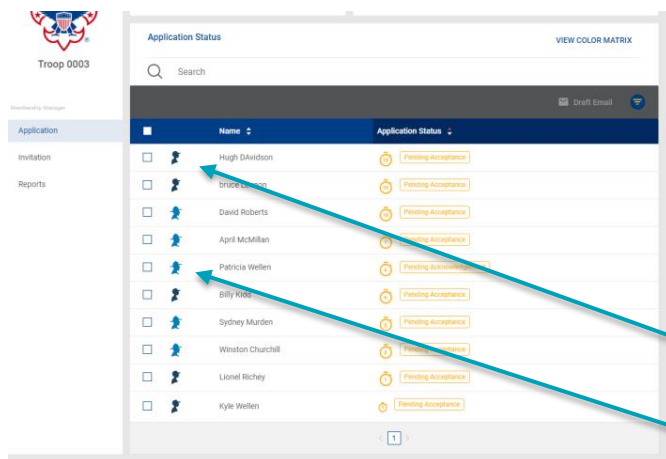
If the applicant chose the option of **paying by cash/check** the invoice will show an amount due. This is the amount the unit must collect from the applicant along with a copy of the email or invoice with the record locator.

UPDATE with Invoice showing amount due

RECEIPT	
Application ID:	4841
Transaction 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

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.

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.

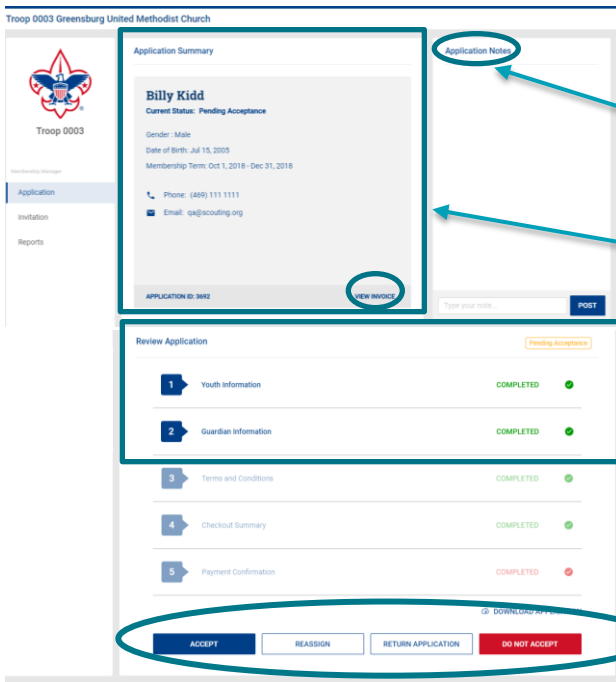


Youth



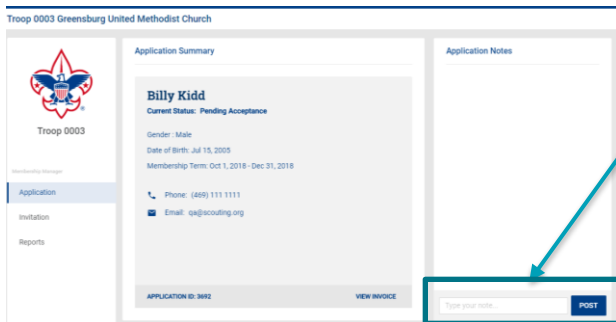
Adult

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



An Application Actions window appears. The main sections are:

1. **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.
3. **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.

Troop 0003 Greensburg United Methodist Church Application ID - 3692

Application Details

Application ID	3692
Parent / Guardian Member ID	118646543
Applicant Member ID	12757478
Applied To Organization	D89F9306-432D-4CC5-9016-52C81FE919E5
Submitted Date	2018-10-18
Current Status	Pending Acceptance

1 Step 1: Youth Information

Tell Us About Your Child

First Name	Billy
Last Name	Kidd
Date of Birth	2005-07-15
Gender	M
Ethnic Background	Caucasian/White
Grade	Ninth Grade

Youth Address Information

Country	USA
Address Line 1	1325 W Walnut Hill Ln
City	Irving
State / Region	TX-TEXAS
Zip	75038

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.

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 APPLICATION

ACCEPT REASSIGN RETURN APPLICATION DO NOT ACCEPT

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.

Troop 0003 Greensburg United Methodist Church

16 Total Applications Last 30 days | 0 Days Average processing time Last 30 days | 7 Application In Progress Last 30 days

Pending Summary

1 Pending Acceptance	VIEW
1 Pending Applicant Response	VIEW
1 Pending Acknowledgment	VIEW
1 Pending Payment	VIEW
0 Pending Renewal	VIEW
0 Pending Review	VIEW
1 Pending Reassignment	VIEW
0 Pending Applicant Acceptance	VIEW
0 Closed	VIEW
0 Completed	VIEW

Alerts

0 - 14 Days since submitted

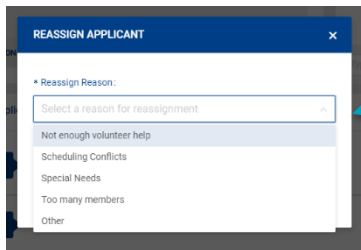
- You will need to follow up with the family and get their invoice and payment. The invoice has their application id.
- Turn in the invoice and the registration fee that is stated on the invoice to the council so that the registrar can post the payment and finish the registration process. **(The unit 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.

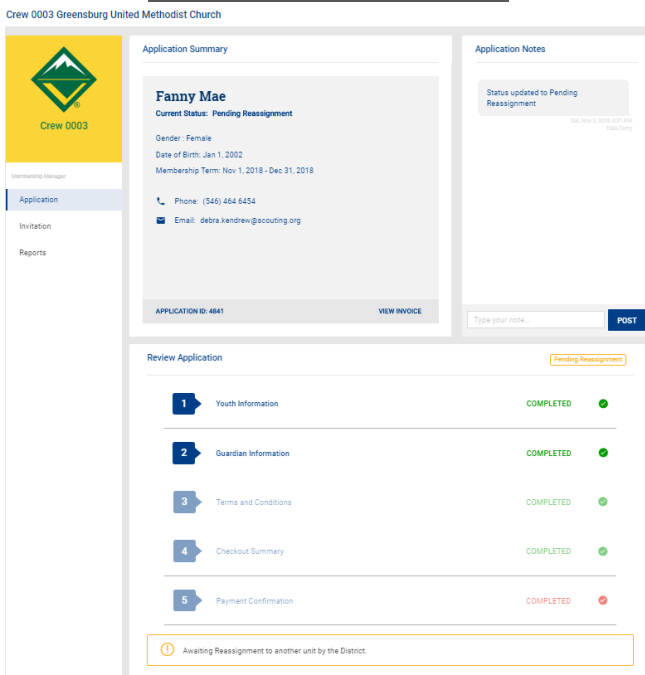
It is important to point out that the 60-day clock for processing an application does not reset, it just continues. So, you need to follow up on receiving the payment before this clock stops at 60 days.



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.



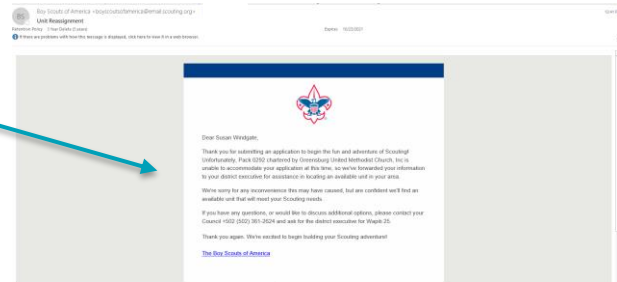
Select a reason for the reassignment request from the list provided. This will be used for reporting purposes.



Pending Summary		
2	Pending Acceptance	VIEW
0	Pending Applicant Response	VIEW
1	Pending Acknowledgement	VIEW
2	Pending Payment	VIEW
0	Pending Refund	VIEW
1	Pending Review	VIEW
1	Pending Reassignment	VIEW
0	Pending Applicant Agreement	VIEW
0	Closed	VIEW
1	Completed	VIEW

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.

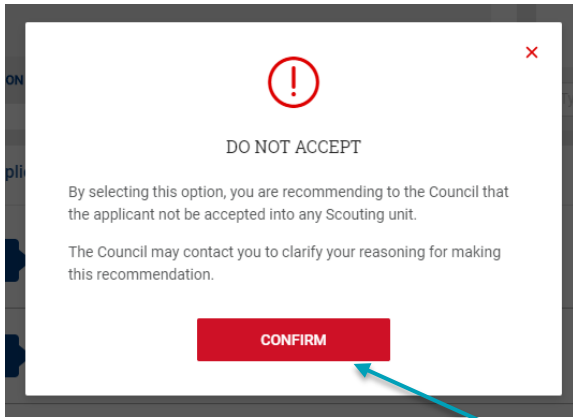
The applicant will receive an email message letting them know that the unit has reassigned their application to the district. It also contains the council contact information so that the applicant can follow up with the council.



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

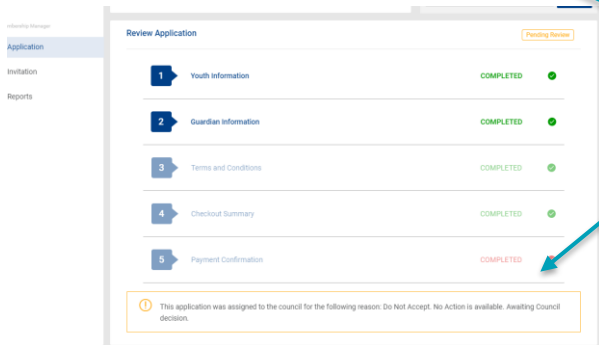
The final option you have for Youth applications is **Do Not Accept**.

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



If you select **Do Not Accept** you will receive a **warning message** like the one on the left.

Do not record the reason for your decision in the Application Notes. That should be a conversation between you and the council.



Click **Confirm** (clicking **X** will return you to the applications for you to choose a different action).

After you click confirm, the status will change to **Pending Review** and a status message will appear at the bottom of the application detail.

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.