



# 2021 CHARTER RENEWAL INSTRUCTIONS

This process must be complete by December 4<sup>th</sup> for your unit to retain its registration and charter status for 2021.

**The BSA Internet Charter Renewal system will be available for Silicon Valley Monterey Bay units on October 1, 2020.**

If this is your first time using the recharter online system, on the charter renewal page, you will find links to a TUTORIAL, as well as downloadable step by step instructions for completing your recharter. You will also find a series of web pages which address your 'how-to' questions, as well the questions we have found to be most common in previous years. Your Unit Commissioner is an excellent resource and is available to help you with all steps of the recharter process.

For a list of Frequently Asked Questions visit: <https://www.svmbc.org/resources/>

## How to get started:

Select an adult to be the renewal processor for Internet Rechartering. Please select someone who is familiar with your unit's youth members and adults. Please note that the committee chair, charter organization representative, and the unit leader are still necessary for this process.

### 1. Select the Link in the email from DocuSign to access your packet and select Start to begin.

DocuSign will be the email sender, but it will be signed by Carmen Fuller, Council Commissioner.

### 2. Begin the Charter Renewal Process in the BSA Charter Renewal System.

Any time after October 1, the renewal processor should gather recharter material below and log onto Internet Rechartering using this link: <https://scoutnet.scouting.org/ucrs/UI/home/default.aspx> or by selecting the link on the resources page at [www.svmbc.org](http://www.svmbc.org)

- You will need this document with your unit online charter renewal access code. (Code is listed below.)
- All applications that have not yet been submitted and copies of applications that have been submitted after Oct 1.  
*\*IMPORTANT: It is highly recommended before beginning the charter renewal that all new youth and adults complete their applications online before beginning the charter renewal process. This will save the charter renewal processor significant time during the process.*
- A current roster from your unit leader (so you know who to register for next year)
- A listing of who wants to subscribe to Boys' Life.

### 3. Select First-Time User and enter the unit access code.

If you are processing the recharter for more than one unit, you will need to log in and register for each separately using each unit's access code. (Everyone is a "first time user" even if you were the renewal processor last year)

IF NINE DIGIT ACCESS CODE IS NOT SHOWN ABOVE, YOU CAN GET IT FROM YOUR UNIT COMMISSIONER OR IN YOUR UNIT SPECIFIC VIRTUAL PACKET. YOU CAN ALSO GET THE CODE BY CONTACTING THE COUNCIL OFFICE  
408.638.8315

Select the unit type ( ) and enter the unit number. ( ) – you may need to add leading zeros to make a four-digit number i.e. Pack #1 would be entered as **PACK 0001**.

### 4. Create a password as instructed. Once you have selected a password, please write it down and keep it in a secure location.

- If you are processing the recharter for more than one unit, you can but do not have to use the same password for all.
- You can choose to use the information in My.Scouting or you can use your Unit Management Software to go through the recharter process and upload the resulting file (upload UMS).
- NOTE: if you are using a compatible program to manage your unit, it is HIGHLY SUGGESTED that you go through the re-charter process in the software, upload the UMS recharter file and go through the steps of reconciling any differences between what you have in your database and what is in PAS. Your information is more likely to be current and correct.

### 5. Complete the information requested on each screen. You can stop at any time, log off the system, and begin again where you left off by reentering your access code and password.

### 6. When you've completed all the information to recharter the unit, click the Submit button. Please note that the charter must be signed electronically by the charter organization representative in the system before submitting. You can send your

login information to the charter organization to have them sign-in to the system and sign the unit roster. We highly encourage units to pay through the charter renewal system, but payment can also be made by contacting Bel at the council office.

7. **Download and save .pdf copy of the Unit Charter Renewal Report Package**, which includes the charter renewal application and lists of new members, transfers, multiples, and no-fee adults. You will need to upload this document into Docusign to submit your charter renewal to the council. *\*Draft copies will not be accepted by the council.*
8. **Upload the Unit Charter Renewal Report and required Youth and Adult Applications into Docusign.** Once your charter renewal has been submitted in the BSA Internet Charter Renewal system, navigate back to Docusign and upload a copy of the Unit Charter Renewal Report when prompted on the checklist page, as well as any copies of required adult or youth applications.
9. **Complete Supplemental Forms.** Complete the additional optional and required forms. After completing all necessary fields, please select Finish to submit.
10. **Charter Renewal Process is Complete When All Required Signers Have Finished Signing In Docusign.** Each individual included in the charter renewal process will receive a link to your charter renewal package in Docusign for them to complete their required sections. You can always see the current status by creating an account in Docusign and logging back in to see who has and who has not signed.

When the document is complete, you will receive a notification from Docusign that the process has been completed.

---

## TIPS FOR EASY REGISTRATION

**Reminder: You are not finished until you “submit” at stage 5, download the report and forms the system generates. Please upload all of the pages in the recharter report into Docusign to submit to the council.**

### Review and inputs during the process:

During the process, you will be given the opportunity to print a hard copy that you can share with the other leaders in your unit for their input. Please do NOT upload this form in with signatures on it. Until you complete stage 5, the information is NOT in the system and your charter cannot be processed.

### Registration Fees & Multiple Registrations:

You will be given the opportunity, at **STAGE 4** of the recharter process to mark those in your unit who have paid their registration fee somewhere else in the council and are also active in your unit. Many times this may include your chartered organization representative. If your chartered organization has more than one unit (both a troop and a crew or a pack and a troop) or may be a parent in your unit that is also active in another unit (has a son in Cub Scouts and Scouts BSA – parent is active on both committees) they may qualify. Long-time Scouters in your unit may also qualify because they are active at the council or district level and pay their registration directly. These registration types are called “multiples.” ***A multiple registration has no cost for registration to the unit which marks that person multiple – but please be sure everyone has ONE primary paid registration.***

Please be aware that the ONLY required position which can be multiple within the same unit is the Charter Rep (CR) – the Charter Rep may also be [multiple] registered as Committee Chair or a Member of the Committee.

Institutional Head [IH], Tiger Cub Partner [AP], and Lion Cub Partner [LP] are no-fee registrations. A person registering as IH or AP/LP may also be registered in another fee required position. ONLY the CR may be registered in another fee position within the same unit.

### Boys’ Life Subscription:

You will also be given the opportunity at Stage 4 to mark each person for Boys’ Life subscriptions. If all youth in your unit will be purchasing a Boys’ Life subscription, then you can verify at this stage that you qualify for the 100% Scouts’ Life Award.

### New Youth or Adults:

***Please include application forms for any youth or adult which ScoutNET has identified as needing the application.*** If you have turned the application in previously [for instance, you turned in a youth for registration after you started the recharter process] please be sure to “reload” roster to update information from the ScoutNET system or attach a photocopy of the application to the back of recharter. It is recommended that before beginning the charter renewal process, all new youth and adults complete their applications online and approved by the unit leadership.

Units do not have to input Social Security Number (SSN) for new adult registration online but forms have to be turned in with SSN along with Background Check Disclosure/Authorization form (attached to application forms).

### Youth Protection Training:

***All adults are required to have Youth Protection Training expiring no sooner than March 1<sup>st</sup>, 2021.*** You will not be able to continue to complete the recharter process without all adult leaders having current youth protection. After all lapsed youth protection trained adults have completed their youth protection training, reload the roster to update the recharter system with the updated training status. Youth Protection training can be renewed at <https://my.scouting.org/>

**Non paid adult positions:**

Tiger/Lion Cub Adult Partners and Institutional Heads will be listed on your charter. These are non-paid positions that do not require an adult application. IF any of these adults are taking on an additional or different role in the unit that is a paid position, they will need to complete an adult application and take Youth Protection Training.

**Resetting the unit login and making changes:**

The council staff can reset your unit information if you need to start over or reset your password as long as you have NOT finished stage 5. Call the Council Office to request this.

**We CANNOT reset the information after you “submit”** – any changes that need to be made after that point must be made by adding comments of requested in changes on the downloaded roster .pdf. Through Stage 4, you can go backward to a previous stage and make changes and then continue onward. Changes can be made until you finish Stage 5.

**Minimum Positions Needed for Unit Recharter:**

1. Institutional Head (this is a NO FEE registration)
2. Chartered Organization Representative (may also be registered as either Committee Chair or Committee Member)
3. Committee Chair

**Cub Scout Pack**

Committee Member (2)  
OR Committee Member (1) AND Pack Trainer  
Cubmaster  
Den leader OR Webelos den leader OR Tiger Cub den leader

**Scout Troop/Venture Crew/Sea Scout Ship**

Committee Member (2)  
OR Committee Member (1) AND Parent Coordinator  
Scoutmaster / Venture Crew Advisor/Sea Scout Skipper

Persons holding NO FEE registrations (such as Institutional Head or Tiger/Lion Cub Adult Partner) \*may\* also hold a paying position listed above.

**EACH CHARTERING ORGANIZATION / CHARTER PARTNER MAY HAVE ONLY \*ONE\* CHARTER REPRESENTATIVE – THE SAME PERSON MUST BE LISTED AS CR FOR ALL UNITS CHARTERED WITH THAT ORGANIZATION.**