**APPLICATION MANAGER**

**KEY UNIT ROLES AND ACTIONS IN APPLICATION MANAGER**

Below are the unit positions that have access to Application Manager and the actions they can perform.

<table>
<thead>
<tr>
<th>Unit Position</th>
<th>Actions</th>
</tr>
</thead>
</table>
| Chartered organization representative (CR)*       | • Review and accept or reject unit’s adult leader applications. This is the only role that can accept or reject adult applications.  
|                                                   | • Reviews and accepts or rejects unit’s Venturing adult participant applications.  
|                                                   | • Can review and accept or reject unit’s youth applications (shared unit Key 3 role.) |
| Unit committee chair (CC)                         | • Can review unit’s adult applications and make position recommendations to the CR.  
|                                                   | • Can review and accept or reject unit’s youth applications (shared unit Key 3 role.) |
| Unit leader (Cubmaster, Scoutmaster, Crew Advisor, Skipper, Coach) | • Reviews and accepts or rejects unit’s youth applications (shared unit Key 3 role – primary) |

* If necessary, the institutional head/chartered organization executive officer (IH) can also perform the same duties as the CR.

The following have read only access to view application status to ensure the unit is taking action on applications in a timely manner:

- Unit membership chair, and
- Registration Inquiry (go to page 11 for instructions on assigning this functional role.)
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 drop down list.  
• Select Application Manager.  

Your unit’s Application Manager dashboard defaults to the My Actions tab.
In **My Actions** you will see

- A breakdown of the applications that were either completed or closed over the last 30 days.
- The number of new applications received in the last 30 days.
- A clock showing the age of the application in the system. The system defaults to the oldest submission being shown first.

- Under **In Progress Applications** you’ll see how many applications fall into each phase of the timer.

Note that this count will likely be more than the number of applications you see on your My Actions screen because it also shows items for which you have taken action, but are still in pending status.
In the **Youth** and **Adult** tabs you will see a list of the different statuses that the applications can be in depending on the actions you have taken:

- Pending Acceptance
- Pending Unit Email
- Pending Reassignment
- Pending Applicant Agreement
- Pending Applicant Response
- Pending Payment
- Pending Refund
- Pending Review
- Pending Acknowledgement (Adult tab only)
- Completed
- Closed

Next to each of the statuses, you’ll see the number of applications in that status.

Clicking on a status title will display the unit’s applications that are in that particular status.

Here we have clicked on the Pending Acceptance status. You will notice the listing of applicants in this status looks very much like they did under your My Actions tab.

To see the **details** of a record just click on the applicants name.
If it is a record that you can act upon, you’ll see the action buttons. In this example the applicant is pending acceptance so you can see the blue action buttons and can take action from this screen.

You can also open the application and review the information from this screen.

To Close the record click the x in the upper right hand corner. You will return to the Application Manager Dashboard.

Click the Back button on the blue header bar to return to the list of statuses.

To search for a specific applicant use the Search All feature.
Enter your search criteria in the **Search** field to filter the results.

Again, if you have a record that you can act upon, you’ll see the action buttons when you open it.

If it is not one of your actionable items, you can still review the application and leave notes.

Click the x in the upper right hand corner of the record to close it and bring you back to the Application Manager Dashboard.
Pro-rated fees collected through online registration include only:

- Registration fees
- Boy’s 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.
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.
2. Application Actions.
3. Review Application.
4. Application Summary – which also displays the Invoice where you can see if payment has been made.

First you’ll want to review the application. Click Review Application.
Click on each step to review the information provided in that step.

While you can see all of the information, you cannot change anything.

Click “Done” at the bottom of that page when you have finished reviewing the information.

Once you have reviewed the information in all of the steps, then click “Back” to return to the Application Actions page.

Now you are ready to use one of the actions available and add any notes. **If you want to add notes, they must be added before you select your action.** These notes will not be seen by the applicant but will be tied to the application.

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.

If you are ready to add this youth to your unit, click **Accept**.
The application moves out of your My Actions section and into your Youth tab.

Since 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 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.
Once you have selected the reason, click **Confirm** and the application will be moved from your My Actions tab to your Youth tab under Pending Reassignment. And, the application will be sent to the district to reassign to another unit.

Clicking **Cancel** returns you to the original Application Actions page so that you can take a different action.

If you have an application that requires additional information or you have questions, click **Return to Applicant**.
Enter instructions, comments or questions for the applicant in the text box provided. This information will be included in the email forwarded to the applicant requesting the additional action needed.

**Note:** You are limited to one paragraph. If you add a return the information you type after the return will not be included in the email.

Remember, application notes you enter can be seen by others in your unit who have access, but will not be seen by the applicant. To keep others in your unit informed about your actions you might want to make a note that you have requested more information and why.

Once you have entered your instructions or questions for the applicant, click **Confirm**.
The application is removed from your My Actions section and added to your Youth tab. An email with instructions on how to access the application is sent to the applicant and the application is now in a status of Pending Applicant Response.

Applications in Pending Applicant Response status can be edited by the Applicant or the unit Key 3. Also, the unit Key 3 still has access to the Accept, Reassign and Do Not Accept actions. Edits to information can be made as long as it does not result in changes to the shopping cart. For example, the applicant nor the Key 3 can add or remove a Boys’ Life Subscription. If items in the cart need to be changed, the application must be withdrawn by the applicant and a new submission made with the correct payment amounts.

Remember, the 60 day clock keeps ticking so you’ll want to keep an eye out for an applicant’s response and reach out to them to make sure they got your message if you don’t hear from them within a couple of days.

The last option you’ll 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** “By selecting this option, you are recommending to the Council that the applicant not be accepted into Scouting in any unit. The Council may contact you to understand 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.

Click **Confirm** (clicking **Cancel** will return you to the original Applications Actions for you to choose a different action).

Clicking Confirm will send the application to the council and returns you to your applications dashboard,

The application will be available under the Youth Tab under **Pending Review** status until the Council takes action to either Not Accept or Reassign to the District for reassignment to a different unit.
PROCESSING ADULT/ADULT PARTICIPANT APPLICATIONS

Processing Adult applications is very similar to Youth applications. However, adult application actions can only be processed by the Charter Organization Representative (CR). The Committee Chair can make position recommendations to the CR if the unit has chosen that option in the system configurations.

Like the Youth application dashboard, the Adult application dashboard has the 30 day clock to adding notes and processing the application.

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

- Youth
- Venturing Participant
- Adult

When in the **My Actions** tab, you can click on the name of the adult applicant to open the application.
This tab can provide you with a shortcut to only see the adults that you are required to process under Pending Acceptance.

- **Pending Review** – the applicant was not accepted by your unit and is awaiting council action to either reassign them to another unit or deny their application and refund any money paid.

- **Pending Acknowledgement** – (adults only) the applicant answered “Yes” to at least one screening question, was accepted by the unit, has paid, and has been onboarded. This is just a council notification so that they are aware an applicant with a “Yes” answer has been accepted.

- **Completed** – applicant has been onboarded and all welcome emails have been sent.

- **Closed** – applications in this status have been closed because the applicant withdrew their application, the unit did not accept them, the application timed out, or the applicant turned in duplicate applications.

You can also view adults in all status categories by going to the **Adult** tab

In this view you can see applications that are:

- **Pending acceptance** – the unit needs to review the applications and make a decision to accept, reassign, or decline the applicant.

- **Pending a unit email** – the application has been accepted and is awaiting a nightly process that sends out the email welcome messages.

- **Pending reassignment** – applicants have been reassigned from your unit to the district and are awaiting district action. The unit cannot take action when the applicant is in this status.

- **Pending Applicant Agreement** – applicants have been reassigned to another unit and the unit is awaiting applicant agreement to the reassignment.

- **Pending Applicant Response** – applicants have been sent a message from the unit asking for additional information or clarifications. You can still take action on applicants in this status.

- **Pending Refund** – the applicant paid by credit and has either withdrawn their application, was not accepted by the unit, or has timed out of the system. The council must initiate the refund.
Once you have opened an application, the **Application Summary** will provide additional information you will need to check references and see quickly if the applicant answered “Yes” to any of the screening questions.

Applicants that answered “Yes” to any of the **Screening Questions** can still be accepted.

**However, you are required to enter your reasons for acceptance** in each of the Comments fields provided for the Screening Questions before you can click the Accept button.
Notice that the comments entered for the Screening Questions are recorded in the Application Notes.

In the References section you will find the names and contact information for the applicant’s references. You will want to contact the references to ensure that you want this adult as a leader in your unit.

You will also see the invoice information.

- They have paid by credit card so you will see $0.00 in the Amount Due at the bottom of the invoice.
If you would like to review the application further, you can select **Review Application** to view all of the fields in the application.

Select the information to review by clicking on the step containing the information.

When you have finished reviewing the information you can select the **Back** button to return to the main screen.
After reviewing the application, if you still need more information you can either call the applicant directly or you can select **Return to Applicant** which will send a message that you need more information.

When you select Return to Applicant, a message box will appear. Type your request in the space provided and an email with your message will be sent to the applicant. Note: you must enter your message in one paragraph. Words typed in an additional paragraph will not show on the email message.

**Example Message**
If you are ready to accept the adult, you can now choose the **Accept** Button.

A list of available positions for the unit will be provided for selection. **Select the position** for which this applicant will serve. **Press Save**.

The applicant will move out of your Actions dashboard and into either Pending Payment (if they selected cash option), Pending Unit Email, or Completed status in the Adult tab on your Application Manager dashboard.

If you do not want to accept the adult, you can choose either **Reassign** or **Do Not Accept**.
If you select **Reassign**:

- You will be asked to select a reason for the reassignment.
- The applicant will be reassigned to the district so that they can find another unit willing to take this volunteer.

If you select **Do Not Accept**:

- You will be asked to confirm your selection.
- You will get a message that the council may contact you to learn your reason.

Once your selection is made you will see the applicant move out of your My Actions dashboard and into one of the other adult statuses depending on what you selected.
To view and download reports available through the system select **Reports**.

A list of reports available will show. Select the report you would like from the list.
Reports will be viewed in a spreadsheet format with columns and rows. Below is the **Payment Method Report**. It provides a listing of accepted applicants, the amount each applicant was charged, the amount paid, any unpaid balance, and the method of payment. Units can use this report to understand who is paying in cash or credit and how much they owe the unit.

<table>
<thead>
<tr>
<th>Application Type</th>
<th>Applicants Full Name</th>
<th>Parent/Guardian Assigned Position</th>
<th>Phone Number</th>
<th>Email Address</th>
<th>Applied To Org Type</th>
<th>Applied To Contract</th>
<th>Current Status</th>
<th>Owned By</th>
<th>Date Accepted</th>
<th>Record Locator</th>
<th>Amount Paid</th>
<th>Amount Unpaid</th>
<th>Payment Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>V</td>
<td>Peter Thaler</td>
<td>Committee Member</td>
<td>605-1234</td>
<td><a href="mailto:pewalker@katb.com">pewalker@katb.com</a></td>
<td>Troop0144</td>
<td>West District 08</td>
<td>Pending Unit</td>
<td><a href="mailto:pewalker@katb.com">pewalker@katb.com</a></td>
<td>12/14/2016</td>
<td>605-1234</td>
<td>605-1234</td>
<td>2.00</td>
<td>0.00</td>
</tr>
<tr>
<td>V</td>
<td>Susan Lancaster</td>
<td>Parent Coordinator</td>
<td>605-234</td>
<td><a href="mailto:pewalker@katb.com">pewalker@katb.com</a></td>
<td>Troop0144</td>
<td>West District 08</td>
<td>Pending Payment</td>
<td><a href="mailto:pewalker@katb.com">pewalker@katb.com</a></td>
<td>12/14/2016</td>
<td>605-234</td>
<td>605-234</td>
<td>0.00</td>
<td>3.00</td>
</tr>
</tbody>
</table>

If the unit is only interested in seeing applicants who owe them registration fees, the **Unpaid Applications Report** will provide that information.

All reports can be downloaded into a CSV format by clicking on the green and white spreadsheet icon at the top of the report. The resulting download will automatically open in Excel.
NOTIFICATIONS

The system also sends the Unit Key 3 notifications so that they can take action on inquiries and applications in the system.

The bell at the top of your My.Scouting page is the notification icon.

If you have notifications, a red circle with the number of notifications will display.

You will also receive email notifications twice a week if you have actions to take.

Click on the bell icon to open your notifications or you can open it through your menu on the top left hand side of the screen.

You will see a list of notifications. Open the notifications by clicking on the title.

The message will pop up in a box that you can read and delete or mark as read. You can click the Invitation Manager or Application manager button that is provided in each notification to go directly to that tool.

Hint – Eliminate the red circle from your notifications icon so that you only see new notifications. You will need to delete the notification or mark them as read, otherwise they will continue to show as pending notifications each time you log in.