

New Unit and Annual Membership Renewal Process
Frequently Asked Questions – Updated January 22, 2024

January 22, 2024 Webinar

- 1. Q: Who at the council level is responsible for setting the Auto Approval Renewals selections?**
A: The Scout Executive or a Council K-3 delegate has access to Organization Manager and can make this selection.
- 2. Q: Do Key 3 Delegates have access to the charter renewal?**
A: Yes, Unit Key-3 do have access.
- 3. Q: Can the Key 3 Delegates process/approve the renewals?**
A: No, The Delegates do not.
- 4. Q: Will the membership validations change?**
A: No
- 5. Q: Does unit renewal have the ACH payment option?**
A: No, ACH is not available for the unit renewal \$100 fee.
- 6. Q: How do we process a youth that gets additional financial assistance from the council?**
A: These would need to be a manual renewal within Registrar Tools as all funds are within the council control, and the payment for national fees would come from the council.
- 7. Q: How does a unit acquire an invoice to submit for processing of outside financial funding they have secured?**
A: Complete the renewal process and print the payment screen showing how much has been paid or print out the detailed report found in Registrar Tools.
- 8. Q: Can units pay at the council office and national ACH from the council account?**
A: Yes.
- 9. Q: Can a unit designate which families they will be paying for while others are family pay?**
A: Yes. The unit can designate who they are paying for.
- 10. Q: Will the system allow for partial payments?**
A: No, only full payments will be processed.

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11. Q: Can the unit pay a portion and the family pay a portion?

A: Only one payment can be made in the system per person renewing. So one combined payment would have to be made in the system and the split managed outside of the system between the unit and the family.

12. Q: Is there an option for the council to collect a “per family” fee vs a “per individual” fee?

A: No, currently there is not.

13. Q: Can we have/use discount codes during the renewal process?

A: Not at this time, this will be studied as a future enhancement.

14. Q: If a YPT is good on the date of processing, but expires before the membership renewal date, will there be a flag and/or report to allow councils to continue to closely monitor YPT?

A: YPT will report as it does today, all adults will require to have current YPT to renew.

15. Q: Our council requires YPT to be taken annually. Will we be able to set up auto renewal and have the system verify that YPT is valid for the entire year?

A: The system will not have that functionality.

16. Q: Does this process only look for current YPT on the date of processing, or current YPT for the year?

A: The system will validate current YPT for the date of processing.

17. Q: Would setting the system to not allow units to auto renew prevent units from bypassing the council’s requirement of annual YPT? Would that be the best way to handle it?

A: The council setting to allow a unit to “Auto accept” the renewal does not turn off any auto renewal feature, the members can still renew

18. Q: How would the council drop an adult when their YPT expires to remain compliant with YPT requirements?

A: Suspend their membership until their YPT is renewed.

19. Q: Does the council get the opportunity to review an auto renewal before it is posted? Or does it automatically post when the auto renewal is processed?

A: For unit registration, the renewal is posted, and the council does not get a chance to review. All non-unit renewals are reviewed by the council.

20. Q: Where does the unit upload a new application?

A: There is no place for a council to upload a paper application, they would turn it into the council when the person joins.

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21. Q: If a unit has not been allowing online applications, do they need to turn that on before anyone can renew online?

A: No, those settings are only for online applications.

22. Q: Can the auto renewal for youth and adults be separated?

A: Yes. Reports are coded by position. Notifications to the Key 3 are separated by youth and adult already.

23. Q: Will there be a report available for the 50% loss or no change validation points?

A: There will not be.

24. Q: Will this process catch charter organizations that have multiple units?

A: No, monitoring COR's will remain manual at this time.

25. Q: Does the member or the parent get the email for a UP, VP or EP?

A: If the member is 18 or older, they get the email. If they are 17 or younger the parent gets the email.

26. Q: Should registrars put the parent email in the email address field for all youth?

A: The reminders will go to the parent email address in the parent email field.

27. Q: Will there be any reporting options on bounce back or failed emails?

A: No. We do not have any way to track or report on that at this time.

28. Q: Is there an option to stop parent emails for council paid membership?

A: Council Paid units will not be getting emails sent to the members.

29. Q: Is there an option to offer parents the option to receive the reminders via text in addition to email?

A: Currently that is not an option.

30. Q: Can units update emails themselves?

A: Yes, in My.Scouting and Scoutbook.

31. Q: Can units make the parent connections?

A: Yes, we expect many units to be part of the renewal of their members.

32. Q: Can we make validating email addresses part of the process moving forward?

A: Currently that is not an option, but we can look at it as a possible future enhancement.

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33. Q: Will the alignment look at renewals across all councils/national? How will that be addressed?

A: Yes, all multiples tied to the paid Member ID number will be aligned to the renewal of the paid position

34. Q: How will the sync work for differing unit expiration dates for district/council?

A: The sync will look at membership expiration dates. Not unit expiration dates. The expiration date of all positions will align with the paid position expiration date, regardless if it is a unit or non-unit level position. Once the paid position is renewed, all multiple positions will automatically be renewed as well.

35. Q: How does someone keep a multiple position from renewing if they don't want to continue that position?

A: At renewal they can “turn off” any multiples and they will not renew.

36. Q: Will it be possible to align all members of a family to one renewal date?

A: Not currently. Registration terms are a set 12-month term from the date of registration.

37. Q: Will the council be notified of members that may drop after the alignment process?

A: Yes, there are dropped reports.

38. Q: If someone auto renews in September, but the unit folds in January, what happens to their membership?

A: The membership is still valid for the 12-month term. The member will move to the Member without Unit report. The council should monitor that report and reconnect members with viable units where possible.

39. Q: Can a youth be removed from a unit without expiring or suspending them and move them to the Member without Unit report?

A: No. The unit must expire leaving a valid membership term before they will be moved to the Member without Unit report.

40. Q: Where is the Members without Unit report found?

A: Registrar Tools>Reports>Organization Manager Tool Reports>Members Without Unit Report

41. Q: Is there a sandbox environment councils can access?

A: There is not.

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- 42. Q: Will a unit that does not meet the lapse date be removed from the system?**
A: As is the case today, once a lapse expired without renewing the unit drops, but there will be the same 12-month S/R period for a unit to come back.
- 43. Q: Does it affect voting if members are expiring at different times?**
A: If a person is registered in the position required for the role at the time of the council or district meeting, then it does not have any effect.
- 44. Q: Will functional positions show in the renewal process?**
A: No. The screenshots used on the January 11 webinar were for demonstration purposes only out of our QA environment.
- 45. Q: If a parent does not have a My.Scouting account, will they be directed to the screen to create one, and then to the renewal screen? Or do they need to know how to navigate to the renewal screen after creating an account and getting logged in?**
A: If the parent does not have a My.Scouting account they will need to create a login and then click the link again.
- 46. : If a leader opts out of a unit, how does the unit know they need to fill a position?**
A: Unit Key-3 will get reports monthly if renewals, drops or “Opt-out” is changed.
- 47. Q: Do the new processes have any impact on the requirement of five (5) paid members?**
A: It is still a requirement to have 5 paid members. However, if there is a situation where there are not 5, such as using multiples or transfers, it is an error for the unit but a warning for the council. The registrar can override it.
- 48. Q: Is the Scout Executive still required to approve any units with less than 5 or more than 100 members?**
A: Yes
- 49. Q: Will councils continue to register District/Board/MBC positions on a council level?**
A: Yes
- 50. Q: Will District/Board/MBC positions receive auto renewal notifications?**
A: No. Non unit renewal processes have not changed.

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51. Q: Do councils have the ability to register a unit long term (longer than 12 months) to align with a uniform expiration date?

A: Registrars will have the ability to set charter terms anywhere from 6-18 months beginning in March. This functionality was temporarily suspended to allow the implementation of the new processes.

52. Q: Will this new process work for Scoutreach units/individuals?

A: No

53. Q: If we have a council paid unit (not Scoutreach) paying a reduced fee, how do we know when they need to renew?

A: Council Paid units will renew on their Expiry date like all other units. The Registrar should run a unit renewal report each month and these will begin showing on the report two months out. The leadership of all units, regardless if council paid or not will still receive the renewal emails.

54. Q: Is anything different for Exploring or does it all work the say way?

A: Clubs and Post are included in this change.

55. Q: Scenario: What will happen with any SR units this year? For example, we recharter in December, but on 3/1 the individual renewals come into place, but we have a unit that has expired. If on 3/15 that late unit finally completes everything do they now have to do the individual renewals? Or are they able to be rechartered as in the past? Or will they need completely new unit paperwork??

A: This is to be determined, we are looking at somehow keeping the old system in place for a few months, but it is not in place yet.

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56. Q: Are units able to unilaterally remove leaders who may be preventing them from being validated?

A: Yes, the unit can choose not to renew a member (opt-out).

57. Q: Does the unit have the option to opt out a member even if it's set to family renewal instead of unit renewal?

A: Yes, the unit can choose not to renew a member (opt-out). The unit can also select which members they are renewing, as well as change the Scout's Life subscription settings for each person.

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58. Q: Will units be able to mix and match individual online renewal and unit-controlled renewal? Or is it all members renew online, or all members are renewed by the unit?

A: Yes, the unit can choose not to renew a member (opt-out). The unit can also select which members they are renewing, as well as change the Scout's Life subscription settings for each person.

59. Q: Will the Council Registrar have access to renew a Unit or Family if needed?

A: Yes, unit renewal tracking will be very similar to today, and a manual renewal option will still be available in Registrar Tools.

60. Q: Can we manually transfer youth/adults to be "Unitless" when a unit clearly states they are no longer desired in the unit?

A: No, A unit needs to drop for someone's status to change to "member without unit".

61. Q: Can units still do a paper charter?

A: Yes, a paper unit renewal can still be accepted, and Individual membership renewal fees can still be paid to the unit or local council office.

62. Q: Does the COR/CUR/IH need to approve renewals as part of the unit renewal?

A: Yes, but units can change the settings in Organization manager and allow for auto approve, it's a unit option.

63. Q: How will we know if someone is prepaid?

A: Council / District will have access to reporting in My.Scouting for members that are due to renew, members renewed, and members dropped (opt-out).

64. Q: For Unit Pay, will the notification to the Unit Key 3 each month also go to the Key 3 delegates?

A: Yes, Unit Key 3s are notified each month about which members are due to renew that month.

65. Q: Is there a limit to the number of Key 3 delegates each unit may have?

A: Each unit can have up to 3 delegates.

66. Q: How will I be able to manage Scouts with financial assistance (the council pays a portion of their fees)?

A: Subsidized membership fees would be a pay at the council process, as it is today.

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67. Q: In order to "post" the unit, will it need to have five youth members currently paid, and the correct required adult leadership paid?

A: Yes, no change as it related to unit renewal minimum requirements. In addition, all leaders will have to have a clear Criminal Background Check returned before the unit can be posted.

68. Q: Is it possible for units to pay for their leaders but have the youth renewals be handled directly through National?

A: Yes, using the Roster tab, the unit selects which members they are renewing.

69. Q: Can a family or unit choose to pay at the council?

A: Yes, Individual membership renewal and fees are paid to the unit or local council office.

70. Q: Will Units have the option to pay for their members?

A: Units will be able to choose to pay renewals for all members, this option will block the online payment by the parent.

71. Q: If a unit chooses to pay, do the families still get the email to renew?

A: Yes. Families or individuals will still get the renewal email. The unit will need to communicate how they are handling renewals. The system will not allow anyone to double pay. If the parent pays, the unit would be locked out, and if the unit pays the parent is locked out.

72. Q: If a Scout is with a different council and their units all expire and renew October 1, 2023, the scout paid full fees. Now in November 2023 they transfer to a different council, the new councils' units expire December 2023. Will this scout have to pay annual registration fees again for another 12 months?

A: No. Membership is for a 12-month term. The Scout would transfer to the new council/unit and his annual fees paid will be reflected in the new unit. Effective March 1, 2024, member renewal will not be affected by the unit renewal date moving forward.

73. Q: Regarding units with Dec, Jan, Feb recharterers. What happens if a unit doesn't recharter prior to lapse period? Will everyone on the unit roster need to reapply?

A: If the unit drops the members will drop too, those who joined after August 1st will become "members without unit" status and as always, a dropped unit can "S/R" during the remainder of the year to renew

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74. Q: If a unit expires with current members whose registration expires after the unit, what happens to their membership?

A: They will still remain members under the category of “Members Without Unit”. The council should monitor that report to align the members with new units where possible.

75. Q: If a family doesn't renew on time or chooses not to renew, when and how is Unit Leadership notified?

A: Each members' Renewal status will be shown on the unit roster. Units will have access to reporting in My.Scouting for members that are due to renew, members renewed, and members dropped (opt-out) and the unit Key-3 will get a monthly email recap.

76. Q: Do the councils have the option to choose the unit renewal dates?

A: Starting in March, councils will have the ability to adjust the unit renewal date from 6-18 months. Registrars will be able to do this by using Registrar Tools and adjusting the unit expiry date within the 6-18-month range, this does not change any membership renewals, and the \$100 recharter fee is not changed either.

77. Q: There is conversation that units will work with their council to determine their charter renewal date. How does this process work?

A: The unit renewal date is at the council's discretion.

78. Q: Will Units be able to align members to their charter renewal 12-month period?

A: No. Membership terms are 12-month terms from the date they become members. Membership renewal is no longer tied to the unit renewal.

79. Q: Do councils have the option to opt out so district membership goes through the office?

A: Yes

80. Q: How will non-unit renewals work?

A: No change. Each individual will get an email. The registrar chooses the leaders at the non-unit level to renew, they will get emails like everyone else, but the council can opt-out individuals too.

81. Q: What about organization levels (e.g. district or council) that haven't done a traditional unit recharter?

A: Non unit renewals will auto post, councils will need to manage this to fix nominating committee results.

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82. Q: What if the youth/adult has a primary position in a different council?

A: Each council has control of their membership so the person will need to renew in each council

83. Q: What if there is a scout registered as a crew member but also in a troop?

A: The youth position in the crew should be the paid position, with the adult position in the troop being a multiple position. This qualifies the members to attend any camps or events where youth registration is a requirement or allows them to work on any youth awards.

84. Q: Current Scouter takes on an additional position, will both positions have the same expiration date?

A: All multiple positions will align with the paid position starting in March. So yes, the multiple position will have the same expiration date as the paid position.

85. Q: Will multiple position expiration dates also align with the paid position expiration date for Non-Unit members?

A: Multiple positions following the paid position will be across the board for all unit and non-unit positions.

86. Q: How will the system handle syncing current registration and multiple registrations that occur during the year?

A: A one-time data sync will be done in March to align all Multiple and Functional Registrations to the Primary (paid) expiry date. Going forward any multiples added will be “forced” to align with the paid registration.

87. Q: How will the system handle people with multiple registered positions

A: The members will need to determine where they want/need to be paid and all others would be multiples.

88. Q: Does the volunteer need to get a list of all their registrations and then pick which one they want to be primary?

A: The System will review the registration on the day the unit is validating, it is based on current registration.

89. Q: When you auto renew a merit badge counselor, will their current list of approved merit badges also renew?

A: Yes

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90. Q: What is the process for the IH to recharter since they won't be paying fees?

A: Unit Renewal will be simplified and streamlined. The unit will validate the leadership and YPT requirements, validate the membership requirements, and pay the Unit Charter fee. This can all be done from one screen in My.Scouting by one of the unit Key-3 leaders.

91. Q: Will this system tell us if an email is not valid?

A: No. We have no way to determine if an email is valid or not.

92. Q: What happens if we do not have an email for that parent?

A: There is a report in Registrar Tools for missing emails. It is the unit's responsibility to reach out to the parents to get them to renew. There are also reminders in My.Scouting and in Scoutbook. So, if an email is not available, there are still those mechanisms in place. The unit can also have the parent provide an email when they reach out to them.

93. Q: Parents who opt out of emails on the Scoutbook level, will that affect them receiving the auto renewal email?

A: No. The process is pulling from the registration record, not Scoutbook.

94. Q: Who gets notified that it is time to renew and when do the notifications start and how often does it follow up with reminders?

A: Council / District will have access to reporting in My.Scouting for members that are due to renew, members renewed, and members dropped (opt-out). Email reminders will be sent beginning 60 days before the renewal date with a link to Renew or Opt-Out. Emails will go 60, 30, 15, and 7 days before, and then 24 hours before and if needed 7 days after renewal date. Unit Key-3 will also get a monthly recap email.

95. Q: Will the email renewal notices begin sending 60 days prior to the expiration date (last day of the month) or from the expiration month (first day of the month)?

A: The renewal process is 60 days, so the first email would be around 12/1 for a 1/31 renewal

96. Q: Will councils be notified if an individual's renewal email bounces back?

A: No. We do not have a process or mechanism to do this currently.

97. Q: Will councils have the ability to initiate a renewal email if an individual's email address is updated?

A: No. But there is a series of emails so any edits will be picked up in the next email (30 days or 15 days etc.)

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98. Q: We don't want Council staff, employee, or Camp staff to get an email for them to pay renewal? How can we prevent that?

A: All members can be renewed in My.Scouting by the person, or the registrar can do it in Registrar Tools similar to how non unit renewals are today.

99. Q: What happens to units with less than 5 youth? Will there be a SE override?

A: It will appear as an error to the unit, but a warning to the Registrar. The Registrar can override the warning with SE approval.

100. Q: What happens if a unit is rechartered, but fails to reregister the minimum membership registrations?

A: If a unit does not have 5 members, the council will need to override the "error" the unit gets, but as is the case today, the council can process without 5 members if needed.

101. Q: What happens if someone is no longer approved in a leadership role when it comes to the unit renewal?

A: The unit will not post until all the required leadership positions are assigned and the leaders have all had clear Criminal Background Checks returned.

102. Q: What happens to units that lose one or more key positions mid-year?

A: As it is today, the unit cannot renew without the required adult leadership. They will need to add the leader before they can renew.

103. Q: How will individual leader expiration dates play into the verification of minimum leadership of the unit?

A: It is all based on the status on the day the unit validates and renews, the unit will not be posted until all the required leadership positions are assigned and the leaders have all had clear Criminal Background Checks returned.

104. Q: For Unit renewals, will the key 3 recharter the unit and the leaders, similar to the current recharter process, or will all adults and scouts renew themselves with email notices?

A: After March 1st the membership renewal will all be on an individual basis, but the unit key-3s will renew the unit only. The person's anniversary date (or expiry date), as it is today, will be the last day of the month.

105. Q: Are people automatically renewed in their current position(s) when payment is received?

A: Yes, but they can also change to a position they are multiplied in as needed.

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106. Q: Is anyone required to review those registrations periodically (as council registrars do now when processing non-unit registrations & renewals)?

A: Yes, Councils should monitor all non-unit renewals.

107. Q: What access will District Executives have to help monitor, guide, and influence this process?

A: Council / District will have access to reporting in My.Scouting for members that are due to renew, members renewed, and members dropped (opt-out).

108. Q: Will there be a report that the Council Admin can pull to see who has registration due?

A: Yes, Auto Renewal Membership – Reports

109. Q: How will units track renewal by individuals ?

A: Units will have access to reporting in My.Scouting for members that are due to renew, members renewed, and members dropped (opt-out). Also, the unit Key-3 will get a monthly email recap.

110. Q: We currently do not accept adult applications online. Will we be required to do so with the new process?

A: No, the manual application and renewal will still be an option.

111. Q: Can the council be provided the data of what reason someone gives when they choose not to renew?

A: Not at this time. But this could be a future enhancement to be considered.