



# 2019 OFFICIAL RECHARTER INSTRUCTION BOOKLET



**Prepared. For Life.™**

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**BE ON TIME – ERROR FREE**  
**Every hour spent by volunteers and Council staff chasing down late recharterers and fixing errors can’t be spent helping youth succeed.**

Thank you, in advance for helping us make the most effective use of our limited resources while we assist you in providing the best possible Scouting program for the youth in Orange County!

**NEW**

***Family Scouting has officially started!***  
 For more information:  
<http://www.ocbsa.org/family-scouting/>

**Insurance Recovery Fee:**  
*\$12 per person/per year*

**Defective Charter Message on page 3**

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**Remains the same:**  
 Annual Registration fee is \$33.00  
 Annual *Boys’ Life* Subscription \$12.00  
 Annual Unit Charter Renewal Fee \$40

- Simple Navigation between screens
- YPT Requirement
- E-Signature
- E-Payment options

**FINAL RECHARTER CHECKLIST**

- Print FULL Recharter Report. Do not send “Draft” copies as it does not have all the information needed to process your charter.
- Payment for Registration, *Boys’ Life*, Charter renewal and Insurance fees.
- All new applications listed on cover sheet (completed WITH required signatures and YPT certificates)
- Signed Charter Agreement Form
- Journey to Excellence scorecard. Must be completed regardless of qualification.
- Returned to Commissioner no later than December 13, 2018.

## **RECHARTERING CHECKLIST**

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Details regarding steps to complete the recharter package is included in this guidebook. Begin your journey on page 3.

- “Submit” and Print Full Recharter Report (no draft copy or EZ Form accepted)**
- New applications** for all youth or adults listed on the cover sheet as "new members" or "new leaders" is attached to charter paperwork.

**The following items MUST be complete on all ADULT applications:**

- Completion of Youth Protection training**
- Signed disclosure consent to conduct a criminal background check (last page of adult application).
  - This MUST be the applicant’s original signature (copies and faxes will not be accepted)
- Name, address, birth date, gender, Social Security number
  - (phone number(s) and email strongly encouraged for communication)
- Signature of applicant
- Question #6 answered in right column
- Signature of Chartered Organization Representative
- YPT Certificate

**The following items MUST be complete on all YOUTH applications:**

- Name, address, birth date, grade, gender, ethnic background field  
(For Lion and Tiger Cubs: Parent or Adult Partner Name, birthdate, gender, address/phone/email if different from youth)
- Parent Signature
- Unit leader signature

Remember Lion and Tiger Partners are not members and no fee is collected – their information comes only from the youth.

- Minimum 10 paying registered youth**
- No Transfers**
- Membership fees**
  - \$45 per youth - \$33 for registration and \$12 for insurance
  - \$45 per adult - \$33 for registration and \$12 for insurance
  - \$12 per *Boys' Life* subscription (available for any registered youth or adult)
  - \$40 Unit Liability Insurance fee

The unit is considered 100% *Boys' Life* if at least one person from each family receives a copy of the magazine.

- Charter Agreement** – Form is available to print in final stage of the online charter process. Must be signed by the Institutional Head (Executive Officer) and Charter Representative of the charter organization.
- Journey to Excellence Scorecard** – Regardless if the unit qualifies, please submitted completed form with the recharter package.

## **INTRODUCTION TO RECHARTERING**

### **What is a Charter?**

The chartering process is one of the oldest traditions in Scouting. It is the formal (legal) document that certifies the agreement between a Chartered Partner – an organization that agrees to utilize Scouting as part of its service to youth and community outreach – and the Boy Scouts of America, setting expectations for the quality of program to be delivered to the Charter Partner’s youth population.

### **Why is a Charter Renewed Annually?**

- Fosters a formal, timely plan for regular dialogue between charter organization and BSA.
- Assures up to date member registration in district/council Scout activities and rank advancement.
- Makes units eligible to qualify for yearly Journey to Excellence goal setting, review process and recognition.

### **Unit Charter Renewal**

Unit Charters are issued for one year and expire on the last day of the charter renewal month (aka recharter date) printed on the charter. After that, units are “separated” from Scouting, the unit is “dropped” from BSA membership, as are all its members.

When a unit is separated from Scouting, it ceases to exist and CANNOT legally operate in any capacity, including activities and advancement. An expired unit has no status in BSA and no insurance coverage for any of the unit’s members and Chartered Organization. Youth and adults are unregistered, cannot attain awards and recognition. Advancement or achievement of any kind for the boys – including Eagle Rank – cannot take place, and tenure in rank and for leadership positions is stopped.

Units have access to the online recharter system for 60 days before the unit expiration date and ending 30 days after to fix problems. Please be sure to process your recharter accurately and on-time.

### **Privacy Policy**

Charter renewal involves confidential and/or private information and accepting the responsibility for maintaining the privacy and confidentiality of that information. Private and/or confidential information must never be shared outside the Boy Scouts of America. If the recharter processor cannot accept this responsibility, a different person must be identified to complete the recharter.

### **\*\*Defective Charters\*\***

Charters can be kept on hold for a variety of reasons. We ask that you review this guide to complete an error free recharter package. Should the council staff find errors, we WILL contact the unit committee chair to correct deficiencies. Please be courteous and return communication as soon as possible so that your charter may be processed on time and prevent delays with *Boys’ Life* subscriptions and advancement purchases.

## **GETTING STARTED**

Congratulations, you have been selected as the Online Recharter Processor for your unit. The Online Rechartering process allows you to be in complete control of your information - this ensures that it will be correct, and you can do it from home or office, anytime that is convenient for you.

It is highly recommended that you attend the District's Recharter Workshop. During this training, you will receive information and help on how to log on and process your recharter. An online tutorial and PowerPoint presentation are also available on the recharter website if you need a refresher on the information heard at the meeting. Access to the Online Recharter system will open **November 1st**,

To be eligible for the Journey to Excellence Unit Award, your recharter must be turned in On Time. This means the recharter must be submitted, paid and delivered to your Unit Commissioner between **November 2<sup>nd</sup> and December 13th**.

*RecharTERS are due to your Commissioner **no later** than the December Roundtable, December 13, 2018.*

### **Here is what you'll need to get started:**

The website: [www.ocbsa.org](http://www.ocbsa.org). Select "Online Recharter" shown on the lower right of the website home page. The Online Rechartering system requires Google Chrome, Firefox, or Explorer 11 (if not using Explorer 11, you may need to select compatibility mode.)

1. A PowerPoint presentation is available which will walk you through each step of the system.
2. Your Access Code (label affixed to the front of this booklet)
3. **Gather all information needed to start recharter:**
  - a. Current Unit Roster (can be obtained from your Unit Advancement Processor or from Council)
  - b. List of youth and adults to remain on roster.
  - c. List of youth and adults to be removed from roster.
  - d. List of youth and adults who want *Boys' Life*.
  - e. Completed applications for **ONLY New** youth and adults. (if a youth member is a Lion write Lion on the top of the app please)
  - f. Disclosure forms and YPT certificates for **New** adults.

Youth Protection Training is required for all leaders at the time of registration. Paper applications from new leaders must be accompanied by a Youth Protection training completion certificate, which must be filed with the application. Because completion of YPT is now required for all leaders at the time of registration, unit leaders must obtain copies of the completion certificates from leaders who register online before approving their application. **NOTE: Recharter will be kept on hold** until all adults have submitted YPT completion certificates.

Once you have logged onto the Online Recharter website:

1. **Select First-time user** and enter the unit access code. (Each year you are a First-time user when accessing the system for the initial set up. Codes and passwords from prior years are no longer active).
2. Select the unit type and enter the unit four-digit number. (ex: unit 70 will be 0070)
3. Create a password as instructed.
4. Complete the information requested on each screen.

**Note:** You can stop at any time, log off the system, and begin again where you left off by reentering your access code and password. **IMPORTANT NOTE:** Select "Update Roster" each time you log back into the system.

## **RECHARTERING TIPS FOR SUCCESS**

### ***From the Council Registrar***

1. The Online Rechartering system requires Google Chrome, Firefox, or Explorer 11 (if not Explorer 11, you will need compatibility mode.) Be sure scouting.org is added to compatibility view.
2. Please make sure all mailing addresses and email addresses are up-to-date. Returned mail means a Scouting family is missing out on valuable Scouting information.
3. When entering names, Use **ONLY** legal names on applications. **NO NICK NAMES!**
4. **DO NOT** overtype on an existing record. You must add new and then choose position.
5. Lion and Tiger Parents (position LP & AP) cannot be changed to a registered position without a new application and YPT training.
6. All adults must have current (cannot expire prior to January 1, 2018) Youth Protection Training or you will not be allowed to move forward in the processing of renewing the charter for 2018.
7. Take advantage of the UPDATE Button use it multiple times throughout your charter process.
8. Simplify your recharter process: Turn in all new youth and adult registrations to the Council Office at least 15 days prior to starting your recharter. This will make the process go much faster.
9. Please do not add fake birthdates. The age of youth is relevant to the BSA program.
10. Please make sure that when unselecting/deleting, you delete the correct person. If deleted by accident, recheck name in Stage 2 and continue. **Do Not Reenter online.**
11. **No One should be marked as a transfer;** there are NO transfers at recharter time.
12. **There must be at least 10 paying youth for a Unit to Recharter.** (Crews excluded)
13. Check and confirm all multiple registrations. (*See section on "Multiple Registrations"*)
14. If a Scout or adult leader wants *Boys' Life*, **please be sure to mark it** during the online rechartering process and include fees in final payment.
15. Please make sure all **New** applications are completed, with signatures, birthdates and correct adult social security numbers. These must be attached to the recharter packet at turn-in.

**Note:** Please make sure that all youth and adults that should be registered are registered. Unregistered leaders and youth are not covered by insurance and the youth may not qualify for advancement. Be sure to immediately turn in new applications at the Council Service Center anytime during the year.

## **BOYS' LIFE SUBSCRIPTIONS**

***BOYS' LIFE* Is ~~Optional~~ Essential!** Unit leaders work hard to bring the best Scouting program possible to their unit members. Surveys and experience have shown that ***BOYS' LIFE*** magazine is **ESSENTIAL** to a strong Scouting program. Successful leaders use ***BOYS' LIFE***.

Units can qualify for a **100% *Boys' Life* Streamer** if every family receives at least one subscription. If your unit is a Journey to Excellence Unit, you will also qualify to wear the **Journey to Excellence/100% *Boys' Life* emblem**.

## **JOURNEY TO EXCELLENCE UNIT ASSESSMENT (JTE)**

The Journey to Excellence Unit Assessment includes recognition for outstanding packs, troops, and crews, that strive for continuous improvement and conducts a quality program for their youth on an annual basis. **All units must turn in the JTE scorecard** at the December Roundtable to be considered for the JTE award. Units that qualify may wear special emblems ordered through a Council Scout Shop.

## **RECHARTER STEPS**

**Stage 1** – Load Unit Information. This will populate the online system using your current membership.

**Stage 2** – Update Roster. Update information, select which members to drop from next year’s roster, add adult members, add youth members, update member data, and update member positions.

**Stage 3** – Check Roster. Validate the data to be submitted conforms to BSA rules (such as adults in required positions and all Lion and Tiger Cubs members have an adult partner)

**Stage 4** – Update Member Fees. Update fees, assign multiple status, and sign up members for *Boys’ Life*.

**New Step** Give Access Code and password to the Charter Org. Rep who is listed on the charter for 2018, they will log into the system and are required to do an E-signature to approve charter.

**Stage 5** – Review draft version before selecting the “Submit to Council” button. Submit roster and pay fees online: via e-check or credit card (3% convenience fee), or submit unit check with final paperwork. Complete the youth not renewing survey.

## **UPDATING ONLINE ROSTER – STAGE 2**

There are six steps in Stage 2: Update Roster:

1. Update chartered organization information (contacts, addresses, phone #)
  - Review your chartered organization information and make any necessary changes.
2. Select members for renewal
  - Select for renewal only the members who will be renewing with your unit.
3. Promote members (see page 7 for instructions)
4. Add new members (*These require completed application to be attached*)
  - Add new adults and youth to your roster.
5. Update member data
  - Update the personal information of members on your roster (birthday, email address, home address, phone number or occupation). *Every Scout & leader should have an email address. Parent emails should be used for youth members.*
6. Update adult positions

## **UNIT KEY 3**

The Unit Key 3 consists of the unit leader (CM, SM, NL, SK), the chartered organization representative (CR), and the committee chairman (CC). The Unit Key 3 is a critical component to the success of Scouting. The Unit Key 3 meets once a month to discuss the unit issues, volunteer vacancies, coming events, and progress towards completing their action plan and Journey to Excellence goals. It is a time for the Unit Key 3 to spot early warning signs and work together toward continued unit success.

When rechartering the unit, please align your leadership to implement the Unit Key 3. This means spreading out the positions if one person is serving as committee chairman and chartered organization representative. This three-person structure allows each person to contribute their individual strengths, abilities, and perspectives based on the focus of their trained position.

We also recommend that the unit leader and the committee chairman not be married or Arrow of Light parents. This allows for a better succession plan as parents transition into the next program.

**POSITION CODES and TITLES**

All positions can be held by male or female and the minimum age requirements for each position is in parentheses next to the position. These are all fee-paying positions – except LP, AP and IH.

CR	Chartered Organizational Rep (21)	SM	Scoutmaster (21)
CC	Committee Chairman (21)	SA	Assistant Scoutmaster (18)
MC	Committee Member (21)		
<b>NM</b>	<b>New Member Coordinator (21)</b>	NL	Crew Advisor (21)
IH	Institutional Head (21) – <i>Non Paying Position</i> (Executive Officer and IH are same person)	NA	Crew Associate Advisor (21)
		VP	Venturing Participant (youth 18-21, Adult app)
CM	Cubmaster (21)	SK	Sea Scout Ship Skipper (21)
CA	Assistant Cubmaster (18)	MT	Sea Scout Ship Mate (21)
DL	Den Leader (21)		
DA	Assistant Den Leader (18)	91U	Unit Scouter Reserve (21)
LL	Lion Guide (21)	92U	Unit College Scouter Reserve (18)
PT	Pack Trainer (21)	92V	Venturing College Scouter Reserve (21)
TL	Tiger Cub Den Leader (21)		
WL	Webelos Den Leader (21)	AP	Tiger Cub Adult (18) – <i>Non Paying Position</i>
WA	Assistant Webelos Den Leader (18)	LP	Lion Partner (18) - <i>Non Paying position</i>

**Note: The online system will flag your recharter if required positions are missing.  
The NM can serve as one of the member of committee positions.**

**SCOUTER RESERVE POSITIONS**

These positions are for adults that wish to remain on their unit rosters, without registering as an assistant leader or committee member. These positions use the same application, fees and registration process, as any other adult volunteer but the only training requirement is Youth Protection. Scouter Reservists do not need to complete Position Specific Leader training or any other adult leader training after completing YPT.

If a young person or adult continues to be highly active with the unit (attending at least 1 meeting per month and/or participating in any campout or other activity during the program year), then registering them as an assistant leader is required. In that case, they will need to complete the appropriate Position Specific Leader and Outdoor Leader trainings.

UNIT COLLEGE SCOUTER RESERVE  
(Position code 92U) For Packs, Troops,  
Minimum age requirement of 18

VENTURING COLLEGE SCOUTER RESERVE  
(Position code 92V) For Venture Crews and Ships  
Minimum age requirement of 21

- If a young person is away at college, on a mission, or in the service and wants to stay registered with the unit, the Unit College Scouter Reserve or Venturing College Scouter Reserve would be the appropriate method of maintaining their registration with the unit.

UNIT SCOUTER RESERVE  
(Position code 91U) For Packs, Troops, Crews and Ships  
Minimum age requirement of 21

- If an adult supports the unit but is not an ongoing participant in meetings, activities and outings the Unit Scouter Reserve would be the appropriate method of maintaining their registration with the unit.



## **UPDATE ROSTER BUTTON – USE THIS OFTEN**

The “Update” Button can be selected anytime during the recharter process prior to Stage 5. This button allows units to upload the roster from the BSA system which may have additional youth and adult applications that were recently posted to the unit roster. The update does not overwrite any changes already made to the system. You will be able to go through stages 2-4 to view these new additions to the roster.

Example: Unit turns into Council applications after Nov. 1<sup>st</sup> or after the date when the unit initially started the renewal process. Use the update button to upload the new people and continue recharter process.

## **MULTIPLE REGISTRATIONS**

**Only the Chartered Organization Rep (CR) can hold more than one position in a unit.**

**The CR may serve in a multiple capacity as a member of the committee (MC)** within that unit if there are not enough adults registered for these positions. The CR cannot serve as the unit leader (Cubmaster, Scoutmaster, or Crew Advisor). Den Leaders (DL or WL) cannot multiple register as MC.

Other adults may register in only one position per unit. If a unit feels that better service can be provided by an adult already serving in another unit, that individual may still hold only one position in each unit. There are no restrictions on the number of positions one person may hold as long as the individual serves only one position per unit.

Youth who are registered as Boy Scouts may multiple register as members of a Venturing Crew. Registration fees are paid only for an individual’s primary position; there is no fee for multiple positions. Multiple registrants will only receive a membership certificate for their primary position.

Some leaders choose to have their primary registration with the District or Council. Mark them as multiple in the recharter process and remind them to pay their registration fees to the Council Service Center by December 31st.

If a new individual is registering as a multiple, please indicate that on the application by writing **MULTIPLE** on the application.

Only youth (18 years and older) in a Ship or Crew may multiple register as both an adult and youth.

## **PROMOTE MEMBERS**

The promote members provides the ability to move youth and adults from one unit to another **within the same chartered organization**. Promote members is integrated seamlessly into the recharter system and is a simple process with step by step instructions. The summary page of the charter will show who an application is needed for.

**Youth to Adult Promotion** - The promote member process can be used to promote youth in the troop to an adult position in the troop (ex. youth member to Assistant Scoutmaster). An adult application, social security number and YPT are required to complete this process. All adult leaders must meet the adult requirements before joining.

**Crew and Ship 18 Year Old Youth** - Scouts who are 18 years old and registering with a Crew or Ship as a youth, and who are also an adult assistant Scoutmaster or 92U with a Troop, would pay membership with Crew or Ship for their primary registration and dual role as the adult. Remember, all new youth and any youth turning 18 in the new year must complete an Adult Application with position code VP if 18 years or older.

## **COMPLETING THE RECHARTER – STAGE 5**

Step 1 – Look at “warning” messages and correct errors.

Step 2 – Give access to the unit Charter Representative to complete the online e-signature to approve charter. The CR will need to use the login and password of the recharter specialist to complete this step. No other signatures are required and there are no signers needed on printouts.

Step 3 – Pay registration fees online with a credit card or e-check, or submit a check with final paperwork.

Payment with credit card will require a 3% service fee.

If the unit wants to pay from their unit account at the council office or submit a check, simply print the Full Recharter summary and give to your Commissioner with payment. Only one check, payable to OCCBSA is accepted. Credit Cards are not allowed for manual turn ins.

Please verify unit account balance has appropriate funds for charter payment.

Step 4 - Submit charter. If paperwork says **Draft Version**, the recharter has not been submitted online correctly and cannot be accepted.

Step 5 - Print Full Recharter Summary Report.

If payment is made online, the report will show a zero-balance due.

The report will also show what applications of youth and adults are required to complete the recharter.

Step 6 - Deliver completed recharter to your Commissioner on or before December 13, 2018. **Do Not deliver or mail to the Council Service Center.**

Due to Commissioner:

- Full Recharter Summary Report.
- Registration payment if required.
- Signed Charter Agreement Form
- Journey to Excellence scorecard. Must be completed regardless of qualification.
- All new applications if listed on summary (completed – including required signatures and YPT certificates)

Make sure all new Adult applications have the Charter Representative signature, a Social Security number, a leadership position, Question #6 (Additional Information) is answered and the Disclosure Form attached; signed by the applicant, remember the 2 spaces that need the initials of the applicant too.

**Note: All recharter fees are sent to the National Office. The Council DOES NOT receive any part of the registration fee to offset local operating costs.**

## **FREQUENTLY ASKED QUESTIONS**

### **Where can I get a copy of our current BSA Roster?**

The first person to ask would be your unit Advancement Coordinator. Rosters are available through the Online Advancement System and My.scouting.org or from the Council Service Center. Email registration department.

### **Where can I check the training status of unit leaders?**

Go to <https://my.scouting.org> and select Legacy Web Tools & Training Validation to look up leaders. Or you can request from a member of the Unit Key 3 (CR, CC, unit leader) a copy of the Training Detail Report or email registration department.

### **I have not received my membership card?**

You can print your own cards from your personal my.scouting.org account profile section. Membership cards are also mailed out to the Unit leaders after the recharter has been processed by the council office. If you are looking for person ID #, the Advancement Coordinator for your unit can print temporary cards or a roster with everyone's personal ID#. Note: You will only receive a membership card for your primary position (the position which you paid for).

### **I forgot my log in for Rechartering?**

The council only has the unit access code since you created the password. Please make sure it's something you can remember. You can also use the "forgot password" option or the Council can reset your password if necessary.

**Is my Recharter access code the same as last years?** NO, the access code changes every year.

### **How do I change my Charter Executive Officer/IH?**

Add the new executive officer as a new person on the roster and choose position IH. Do not type over the existing IH.

### **How do we change our Chartering Organization?**

Contact your District Executive. Attach a new unit application to your Recharter, along with a letter from the previous Organization releasing the number and all property to the new Organization.

**Why is my Charter not posted?** *Please contact your District Executive or Council Registrar for details.* There can be several reasons for this:

- a. Applications are missing and/or information on applications is missing, i.e. required signatures
- b. Fees have not been paid
- c. Charter was not submitted correctly online

### **I submitted my Recharter online to the Council and forgot to add someone, what can I do?**

- 1) Submitted the new applications to the council office with applicable fees for current year plus the new recharter year.

### **Why do you need my Social security number?**

All adults must supply their social security for a National background check. It is BSA policy and BSA takes youth protection seriously.

### **I'm changing my position do I need to fill out a new application?**

No, not during renewal. **Yes, if you are a Lion or Tiger partner** and wish to register in a paid position. After the annual renewal, every time you change positions or transfer to a new unit during the year, you must fill out a new application. Be sure application is complete and disclosure page is attached.

## Journey to Excellence

### “Wrapping Up Your Journey to Excellence Assessment”

### Major Features of the Program

- **Improve** and increase adult leader training.
- **Improve** youth recruitment and retention.
- **Improve** parent participation.
- **Improve** youth advancement.
- **Improve** outdoor program participation.
- **Improve** annual program planning.

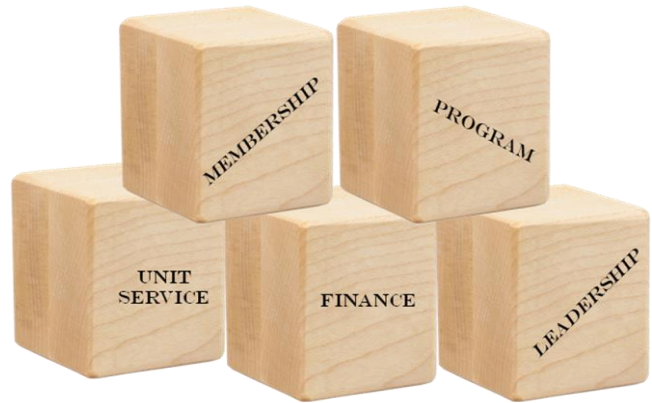
**As the year comes to a close, it is time to complete your unit’s Journey to Excellence Scorecard. The process is fairly simple – you will need the following:**

- The unit’s roster as of January 1, 2018.
- The unit’s 2017 Journey to Excellence scorecard to use as comparison
- The unit’s completed recharter paperwork for 2019.
- The unit’s advancement records for 2018 (all advancement reports submitted throughout the year are available through the Online Advancement System – contact your unit advancement chairman or the Council Service Center.)
- The unit’s activity/service project/meeting calendar and budget
- The unit’s leadership training records (Unit Key 3 members have access to this through my.scouting.org Training Manager for all registered leaders in the unit)

Scorecards are available online at:  
[www.scouting.org/scoutsorce/awards/journeytoexcellence.aspx](http://www.scouting.org/scoutsorce/awards/journeytoexcellence.aspx)

**Required** - Please print and complete three copies – one to turn in with your recharter paperwork, one for your commissioner and one to keep for the unit record.

The unit will receive a recognition ribbon from the Council. The unit may purchase uniform patches at a local Scout Shop.



**The Building Blocks of a Successful Unit**

The Journey to Excellence Unit Assessment includes recognition for outstanding packs, troops, and crews, that strive for continuous improvement and conducts a quality program for their youth on an annual basis.

### FINAL RECHARTER CHECKLIST

- Print FULL Recharter Report. Do not send “Draft” copies as it does not have all the information needed to process your charter.
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- All new applications listed on cover sheet (completed WITH required signatures and YPT certificates)
- Signed Charter Agreement Form
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- Returned to Commissioner no later than December 13, 2018.



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