



For the LATEST VERSION of this document as well as many other Help Documents and Resources please visit the Scoutbook User Advisory Council's **RESOURCE DIRECTORY** at: [bit.ly/scoutbook](http://bit.ly/scoutbook) ...



## MANAGING MEMBERSHIPS



**IMPORTANT: Scoutbook does not automatically make changes to BSA registrations. Currently, all changes are restricted to Scoutbook. Make sure you submit the appropriate paper application to your local Council Service Center to reflect any registration changes.**

**NOTE: You need to have unit admin rights to complete many of the functions listed in this guide.**

### ADDING A NEW SCOUT TO YOUR UNIT

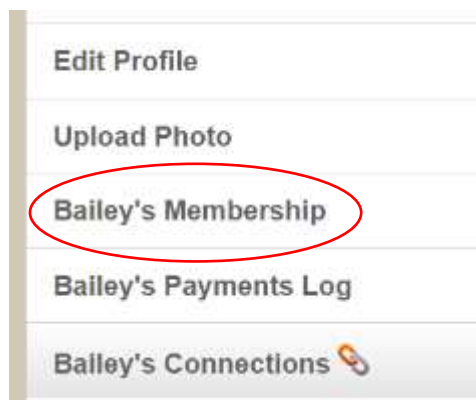
If the Scout is already in Scoutbook in another unit, see the Moving Scouts to Other Units section below.

If they are a new Scout to Scoutbook, enter the Scouts onto your roster by hand. See the Add Scout button at the end of the unit roster in Scoutbook. Enter the Scout's name, date of birth and BSA ID. You can fill in all of the address and parent info after that. Once your council has registered them into your unit, you can then click on the Scout and click the "click here to activate" link on their page to activate the Scout into the advancement sync. Once the Scout is in sync, the advancements will come over within 48 hours.

### MEMBERSHIP AREA

The Membership Area is now the place to add or change the den/patrol assignment of your Scouts. The new link appears on the Scout account page. Use this link to transfer Scouts to a new unit, den or patrol. You can also use this new section to define multiple unit registrations.

To get to the Membership Area: Log into Scoutbook, Click on My Dashboard, then Administration, then your unit, which will be on the right. Then click on your unit Roster, then the name of the Scout you wish to work on. If you have full rights for the Scout, you should see a Membership option (see illustration below.) Click on that.





For the LATEST VERSION of this document as well as many other Help Documents and Resources please visit the Scoutbook User Advisory Council's **RESOURCE DIRECTORY** at: [bit.ly/scoutbook](http://bit.ly/scoutbook) ...



## MOVING SCOUTS TO OTHER UNITS

Prior to moving a Scout to another unit, end all of their leadership positions and in the Scout's page, make sure to add a Scoutbook unit administrator from the unit the Scout is going to, to the Scout's connections using the Scout's connections menu option under the Scout's page. That way they can edit the Scout after the Scout is moved.

When a scout moves to a new unit:

Before moving the Scout, remove the connections all the adults in the previous unit have with the Scout with Connection Manager in the Roster menu or using the Scout's Connections on the Scout's page. Leave your connection to the Scout until you know that other unit has approved the Scout and is managing the Scout. Then you can remove your connection.

In the membership area for the Scout, end the previous membership to add an end date.

Click +Add to add a new unit. The new unit entry includes council, unit type, unit number and a start date. For packs and troops, a Den/Patrol dropdown will appear. A Den must be selected, a Patrol is optional.

If your Cub Scout is not part of a pack with a Scoutbook subscription, select Other for the den. You will then be presented with a list of ranks to select.

The unit Scoutbook administrator in the receiving unit will need to assign connections to appropriate adults using the Connections Manager on the unit roster page.

If you remove them by mistake,

Go to: Home > My Dashboard > Administration > My Account > My Connections

Click on his name there, and go back into the membership area for the scout. You can adjust memberships from there.

## ADDING TO AND MOVING SCOUTS TO A PATROL OR DEN

You can move one or more Scouts by going to the patrol or den's page. Near the bottom of the page, click on the Reassign Scout(s) button



For the LATEST VERSION of this document as well as many other Help Documents and Resources please visit the Scoutbook User Advisory Council's **RESOURCE DIRECTORY** at: [bit.ly/scoutbook](http://bit.ly/scoutbook) ...



The screenshot shows a user interface for managing scouts. At the top, there's a dark header with the text 'Scouts (2)' and a gear icon. Below this, there are two rows of scout information. Each row starts with a grey profile icon, followed by the scout's name in red, a green checkmark, a blue link icon, and a red 'A' in a circle. Underneath the name is the 'CURRENT RANK'. For Michael Test, the rank is 'Life Scout'. For Nicholas Test, the rank is 'First Class'. At the bottom of the interface, there are two buttons: 'Reassign Scout(s)' and 'Add New Scout'.

You can also use the membership area to move individual Scouts to different patrols or dens by clicking on the Reassign Scout button there.

Here is an example:

Click on the Scout

Click on the Scout's Membership, Click on Reassign Scout. Select from the pull down which den or patrol you wish to move the Scout into.

The following will enable you to ADD Scouts not already in your Pack or Troop:

1. go to the den or patrol that you want to move the scout to
2. click on add scout

**NOTE:** Only create a new Scout record if you are 100% sure the Scout doesn't already have an existing account in Scoutbook.

## Transferring a Scout not in your unit to a Den or Patrol

How to migrate your scouts from one unit to another.

**First** – on the originating unit's side. You want to make sure the scouts have everything entered in their awards and advancement, and that the sync has occurred. Allow 24 to 48 hours for the advancements to migrate through the system. This first step is really important if transferring between programs, because it is not always the easiest to move a Boy Scout back to Cub Scouts to enter in their advancement and awards.

**Second** – the originating unit's Scoutbook Admin will want to find out who the receiving unit's Scoutbook Admin is. The originating Scoutbook Admin should then give Full control connection rights to this scout to the receiving unit's Admin. Using the connection manager or the Scout's connections page.



For the LATEST VERSION of this document as well as many other Help Documents and Resources please visit the Scoutbook User Advisory Council's **RESOURCE DIRECTORY** at: [bit.ly/scoutbook](http://bit.ly/scoutbook) ...



**Third** – the originating unit's Scoutbook Admin goes into Connections Manager on the unit Roster page and removes the connections from the unit leaders except the Parents and the unit Admin. If the entire den is moving over, instead of going to the pack connection manager to remove connections, go to the den page then connection manager so you can do a whole row at a time... assuming the entire den is crossing over together.

Once you've done these things – let the receiving unit's Admin know – although they probably received the notice of being connected to a new scout anyway.

The receiving unit's Scoutbook unit admin then does the following things:

- End their membership in the originating unit via edit membership.
  - o This may need to be done by the Scoutbook Admin from the receiving unit or anyone else with connections to the Scout
- Optional: Add them to the receiving unit and sub-unit (den or patrol) through the Edit Membership

There are a few other things for the receiving unit Admin to do and check here.

- Assign the new unit's connections to the Scout – usually through the Connection Manager in the Troop Roster Screen
- Adjust connection access as needed
- Check to make sure the profile has the correct info – like contact information, school and grade, etc.
- Reach out to the parents to make sure they know the scout has been transferred, and whatever profile updates might be needed.
- When bridging into Boy Scouts: Confirm the "Date joined Boy Scouts" is entered, as that helps with ranks and the OA eligibility report.

Occasionally, the Scout will transfer to a unit without a Scoutbook account. In this case, the last Scoutbook unit of record (e.g., the Pack) should ensure the Parents have full control and leader connection to their scout, and to remove connection to everyone except the admin of the Pack. The Pack Scoutbook admin OR the parents can then edit the membership of the scout.

Once the Scouts are on your official roster, you can activate the sync for them. See the video here on how to do that: <https://youtu.be/twEZ2GhRZXo>

#### OTHER NOTES:

If the new unit is not using Scoutbook make sure you have at least one parent connected with Full Control to the Scouts account.

**NEVER** delete a Scout record, doing so will delete all advancement data, notes, photos and videos on the



For the LATEST VERSION of this document as well as many other Help Documents and Resources please visit the Scoutbook User Advisory Council's **RESOURCE DIRECTORY** at: [bit.ly/scoutbook](http://bit.ly/scoutbook) ...



Scout account. If you see a Scout that you no longer wish to see on your roster, just end their membership in your unit in their membership area and remove your unit's leaders and yourself from the Scout's connection or have the parent remove you from his Connections.

## REMOVING OR UNAPPROVING A SCOUT IN YOUR UNIT

If you want to remove a Scout from your unit's roster, you can go to the Scout's Membership page, click on their current membership and Un-approve their position. Alternatively, you can put an end date in their current membership.

If you remove them by mistake,

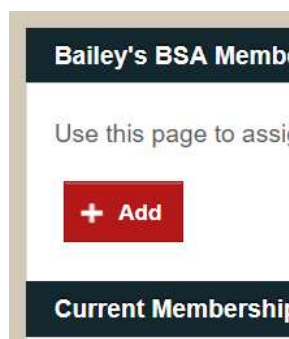
Go to: Home > My Dashboard > Administration > My Account > My Connections

Click on his name there, and go back into the membership area for the scout. You can adjust memberships from there.

## MANAGING MULTIPLE REGISTRATIONS

Often a Scout may be registered in two units. For example, a troop and a Venturing crew. To setup Scoutbook to recognize this, follow the following directions.

1. Watch the three (3) videos in the upper right corner here: <http://scoutbook.com> and setup one unit with the Scouts in that unit.
2. Create a subscription for the second unit.
3. From the first unit, go into the Scout's record and select [Scout] Membership
4. Click the Add+ button



5. Fill out the information for the other unit the Scout is registered in. (alternately, you can do a ScoutNet Import in the unit you need to populate with Scouts.)
6. A unit administrator from the other unit will need to approve the Scout into that unit.
7. From then on, both units will be able to track the Scout in their respective programs.



For the LATEST VERSION of this document as well as many other Help Documents and Resources please visit the Scoutbook User Advisory Council's **RESOURCE DIRECTORY** at: [bit.ly/scoutbook](http://bit.ly/scoutbook) ...

