

## Unit Renewal Guide for Unit Key 3 Member

Unit Renewal is found in Organization Manager and available to Unit Key-3 members.  
(not delegates)

Tips for a successful unit renewal:

1. Remember: This process only renews the unit, not any of the members, which is a separate process based on the joining date or their last renewal date.
2. A unit can renew two months prior to expiration.  
Expiration date = Feb 28, renewal opportunity begins Jan 1.
3. A unit has a three-month lapsed period after the unit expires.  
Expiration date = Feb 28, lapse period ends April 30, will drop May 1.
4. All Combined Troops MUST renew both Boy and Girl units and pay the charter fee for each troop.
5. It is recommended to pre-check all requirements are met prior to proceeding to avoid any validation issues.

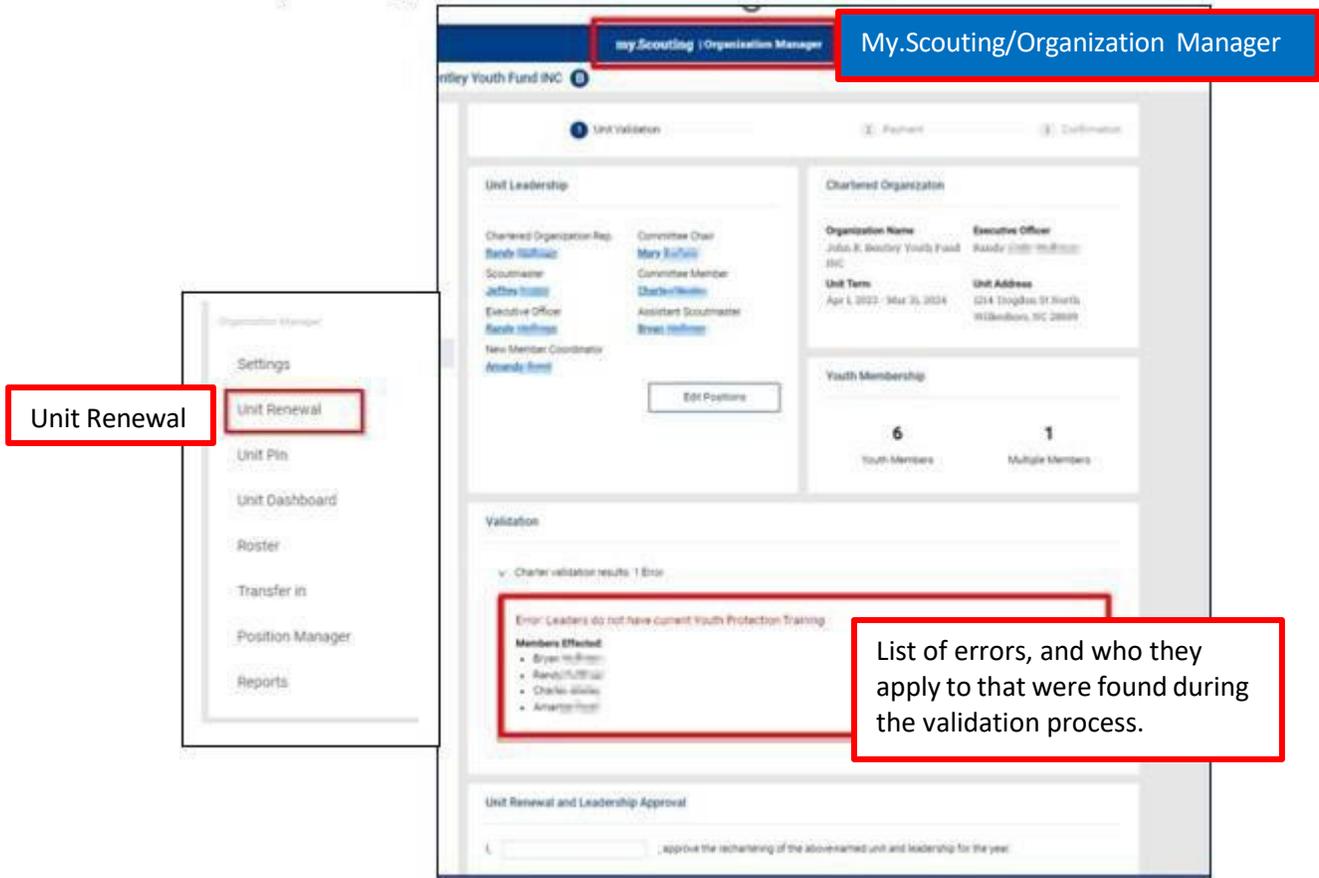
### **Areas to check before starting Unit Renewal Process:**

- a. Check roster and make sure all members have a updated expiration date. If you have members that are multiplied in your unit and they are showing an expired expiration date please reach out to Eileen B.
  - b. *Check that all Leaders have current Youth Protection Training. From your Unit Dashboard you can download a report to see who is expired or about to expire before Feb*
6. Check your leadership positions and make sure you have the correct names in the correct positions, if not the Chartered Organization Representative can use "Position Manager" (also found in Organization Manager) to edit and then wait overnight for the data jobs to run, then you can validate again.
7. Have a credit card or ACH information handy to pay the Unit Recharter fee (\$100.00).
8. Proceed with unit renewal.

# Unit Renewal “Pay at Council Option” 1 of 1

A member of the Key 3 will log in to their my.Scouting account and go to Menu>Organization Manager>Unit Renewal.

When selected, the validation process automatically runs and will show any errors that must be cleared up before proceeding. Each time you open the Unit Renewal page, the validation check processes again. If you are having issues with getting this



resolved

Once all validation errors have been resolved, Select “Click Here to pay at council office option”. Print the document, sign it and send it to [Eileen.B@scouting.org](mailto:Eileen.B@scouting.org) with information on where the money is being taken from (Unit account, Call for credit card payment, etc.)

Eileen will send you an email confirming once the entire process is complete.

**This will complete the Unit renewal process for “Pay at Council office”**

## Unit Renewal “Pay with Credit Card or ECH Option” 1 of 4

A member of the Key 3 will log in to their my.Scouting account and go to Menu>Organization Manager>Unit Renewal.

When selected, the validation process automatically runs and will show any errors that must be cleared up before proceeding. Each time you open the Unit Renewal page, the validation check processes again.

The screenshot shows the 'My.Scouting/Organization Manager' interface. A sidebar on the left contains a menu with 'Unit Renewal' highlighted. The main content area is titled 'Unit Validation' and includes sections for 'Unit Leadership', 'Chartered Organization', and 'Youth Membership'. A red box highlights an error message: 'Error: Leaders do not have current Youth Protection Training'. Below this, a list of affected members is shown: Bryan Hoffman, Randy Hoffman, Charles Williams, and Amanda Hoffert. A 'List of errors, and who they apply to that were found during the validation process.' callout points to this list. At the bottom, there is a 'Unit Renewal and Leadership Approval' section with a signature line and a button labeled 'Next Step: Unit Pin Review'.

Once all validation errors have been resolved, “sign” the renewal by entering your name approving the leadership for renewal and then select “Next Step: Unit Pin Review”

The screenshot shows the 'Unit Pin Review' step of the renewal process. The 'Unit Leadership' section lists: Venturing Crew Advisor (Chris), Committee Chair (Holly), and Committee Member (Nath and Kait). The 'Chartered Organization' section shows: Organization Name (Em), Executive Officer (Glen), Unit Term (Oct 1, 2023 - Sep 30, 2024), and Unit Address (280 Tus). The 'Membership' section shows 5 Youth Members and 1 Multiple Member. A red box labeled 'Sign Here' points to a signature line in the 'Unit Renewal and Leadership Approval' section. At the bottom, there is a button labeled 'Next Step: Unit Pin Review' and a link for 'Click here for Pay at the Council Office Option'.

## Unit Renewal “Pay with Credit Card or ECH Option” 2 of 4

Make any necessary changes to the Unit Pin Setup. Be sure the indication to show on BeAScout corresponds with the “Fields to Display on Unit Pin.”

I.e.: If indicate to show on BeAScout, select which fields to show.  
Then select “ Continue to Unit Renewal.”

The screenshot shows the 'Unit Pin Review' step of a four-step process (Unit Validation, Unit Pin Review, Payment, Confirmation). The 'Continue to Unit Renewal' button is highlighted with a red box. The page displays unit information for 'Crew 0089 Impact of West Alabama', including contact details for Christopher Holloway and a list of fields to display on the unit pin, such as 'Unit Meeting Address' and 'Contact Person's Name'.

The ACH Payment admin fee is \$1.00; the Credit Card admin fee is 3%.

Select “Credit Card” or “Bank Account” (ACH). Enter the credit card or bank account (ACH) information on the appropriate tab.

(See next page for ACH payment information.)

The screenshot shows the 'Payment' step of the unit renewal process. It displays a summary of 'Unit Renewal Fees': Recharter Fee (\$100.00), Subtotal (\$100.00), Admin Fee (Credit Card - 3%) (\$3.00), and Total (\$103.00). Below this, the 'Billing Information' section shows two tabs: 'Credit Card' and 'Bank Account', both highlighted with red boxes. The 'Credit Card' tab is active, showing fields for 'First Name' (Mary), 'Last Name' (Person), 'Card Number' (8 0001 8421 1010 1013), and 'Expiration Date' (12/27).

## Unit Renewal “Pay with Credit Card or ECH Option” 3 of 4

As a unit, you have the option to securely store the payment information for next year if desired. Select “Submit Payment” if paying by credit card or “Pay with Bank Account” if paying by ACH.

A screenshot of a payment form. At the top, there are fields for Card Number, Expiration Date, and CVV. Below these is an Email Address field. A section titled "BILLING ADDRESS" contains fields for Country, Address Line 1, Address Line 2, City, State/Region, and ZIP Code. At the bottom of the form, there is a checkbox labeled "Save this card for future payments:" which is checked. To the right of the form is a blue button labeled "Submit Payment".

Save this card for future payments.

Submit Payment

Click on “Submit Payment” (if by credit card) or “Pay With Bank Account” (if by ACH).

A screenshot of a "Billing Information" form. At the top, there are two tabs: "Credit Card" and "ACH Payment". Below the tabs are fields for First Name, Last Name, Email Address, Phone Number, Address Line 1, City, State/Region, and ZIP Code. At the bottom of the form, there is a checkbox labeled "Save account information for future payments:" which is unchecked. To the right of the form is a blue button labeled "Pay With Bank Account".

Credit Card ACH Payment

Save account information for future payments.

Pay With Bank Account

## Unit Renewal “Pay with Credit Card or ECH Option” 4 of 4

You will next see a recap of the fees. Select “Go to Confirmation.”

The screenshot shows a web interface for unit renewal. At the top, there is a progress bar with three steps: 1. Unit Validation (active), 2. Payment, and 3. Confirmation. Below the progress bar, the 'Unit Renewal Fees' section is displayed as a table:

Recharter Fee:	\$100.00
Subtotal:	\$100.00
Admin Fee (Credit Card - 3%):	\$3.00
<b>Total:</b>	<b>\$103.00</b>

At the bottom right of the page, a blue button labeled "Go To Confirmation" is highlighted with a red box. To the right of this box, the text "Go to Confirmation" is written in red.

You will next see the payment processing and confirmation page, at the same time, an email confirmation and receipt will be sent to the email address provided in the billing information section.

The screenshot shows a payment processing confirmation page. At the top, the progress bar shows steps 1. Unit Validation, 2. Payment (active), and 3. Confirmation. In the center, there is a large yellow dollar sign icon. Below the icon, the text reads: "Your payment is being processed. Please check back later for the status of your renewal order." At the bottom, there is a box containing the "Renewal Order Status" information, which matches the information shown in the previous screenshot.

Your unit is no

The screenshot shows an email receipt for a payment. The header includes the Chase logo and "CHASE Integrated Payments Receipt". The email is from "Chase Integrated Payments <chase-support@wepay.com>" to "Mary Parson". The receipt details are as follows:

Billed to:	Visa xxxxxx4112
	Mary Parson
Total:	USD \$100.00
Purchased from:	Boy Scout of America 1325 W. Walnut Hill Lane, Irving, TX, 75038, US <a href="mailto:Wepay_admin@scouting.org">Wepay_admin@scouting.org</a>
Type:	Sale
Date:	02/08/2024

At the bottom, there is a note: "If you have any questions about your receipt, contact [chase-support@wepay.com](mailto:chase-support@wepay.com)"