

ASSIGNING AND UPDATING REQUIRED ADULT POSITIONS FOR RECHARTER

Access to my.scouting.org and Rechartering tools is based upon positions registered unit adults have been assigned. Therefore, assigning and updating unit positions is an essential step to ensuring that you have access to the tools, training, and notifications relevant to your unit position or role.

Only the Chartered Organization Representative or their delegate can assign or update adult unit positions. The COR delegate is a functional position. Instructions on how to add a delegate are in the Functional Position instructions below.

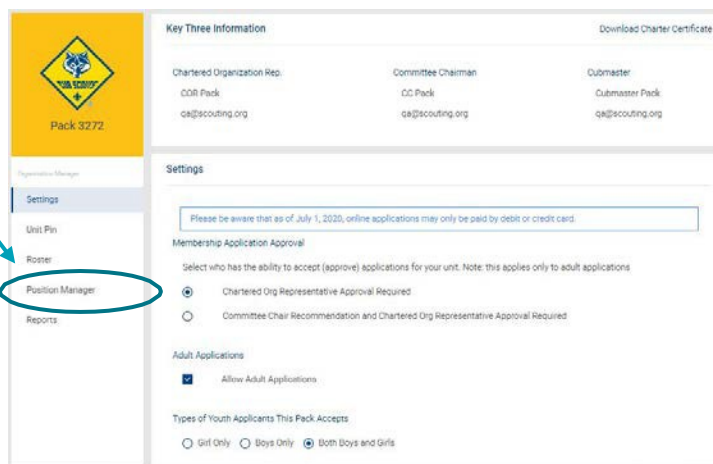
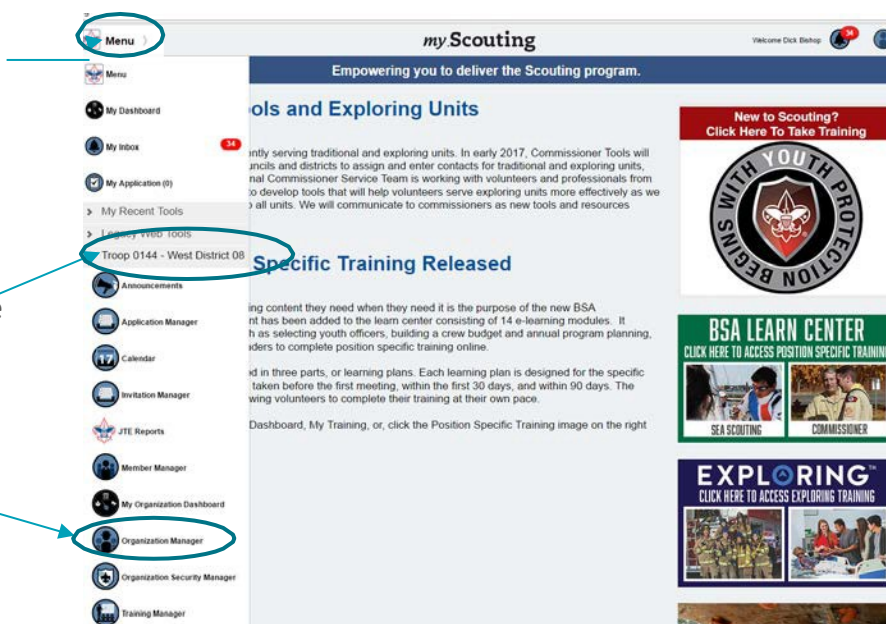
UPDATING AND ASSIGNING REQUIRED UNIT POSITIONS

Step 1: While logged in to your my.scouting.org account, select **Menu** at the top left-hand side of your screen.

Step 2: From the drop-down menu select the **unit** you will be configuring.

Step 3: Select **Organization Manager**

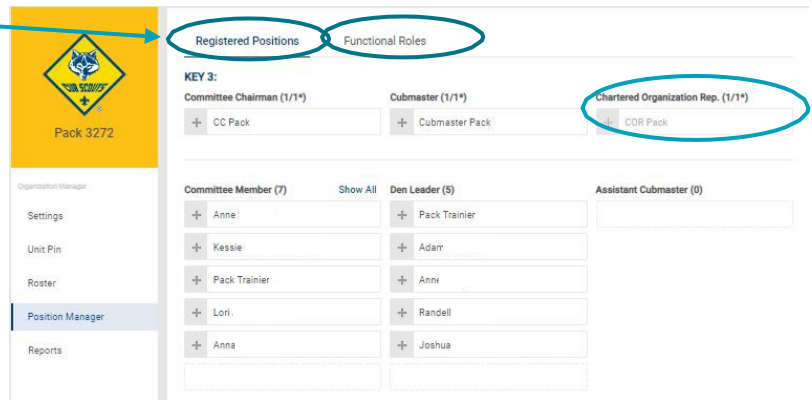
Step 4: From the menu on the left select **Position Manager:** (If you do not see position manager in the list then you do not have access to this tool.)



At the top of the page you will see two tabs, one for Registered Positions and one for Functional Roles.

The page will open with the Registered Positions showing.

Note: only the council can update or change the person holding the COR position. All other positions can be changed by the COR or their delegate.



UPDATING AND ASSIGNING FUNCTIONAL ROLES

Only the COR can assign this functional role:

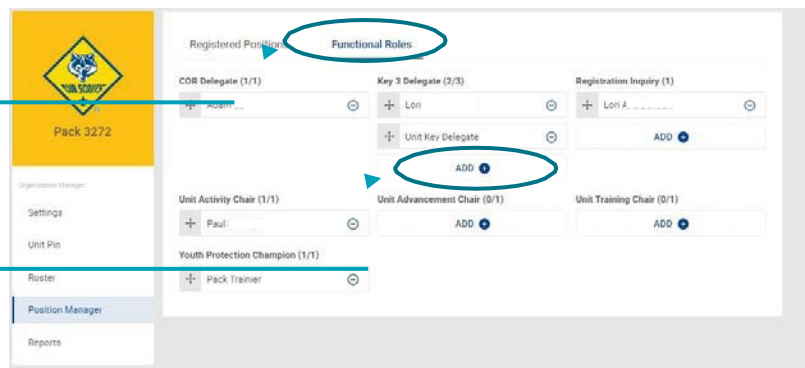
- **COR Delegate** – the Chartered Organization Representative (COR) is the person authorized to assign positions and accept adults in accordance with the BSA Bylaws. This configuration allows the COR to designate another person who is a registered leader in the unit to also assign volunteer positions and accept adult applications.

The COR, COR delegate, Unit Key 3, and Unit Key 3 delegates can assign registered adults to these functional roles:

- **Key 3 Delegate** – This role will have the same access to Online Registration as the Committee Chair and the Cubmaster, Scoutmaster, Venturing Advisor, Skipper, Lab Manager, or Exploring Advisor. Up to three people can be assigned to this role. In this role they can accept youth applications.

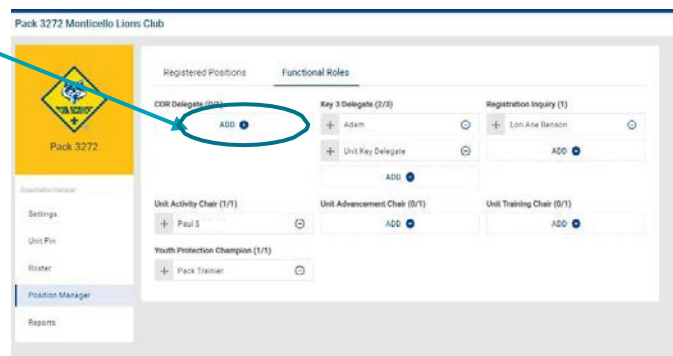
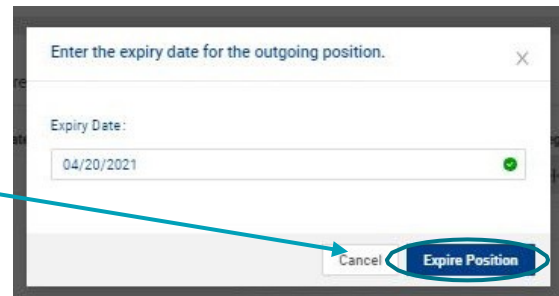
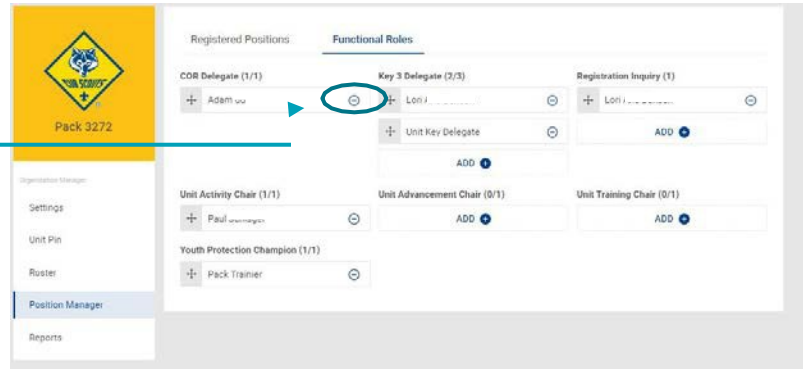
Step 1: While on the **Position Manager** Screen, select the tab at the top that says **Functional Roles**.

- If all of the positions in that role are not filled, you will see an **ADD** button.
- If all positions in that role are filled, you will just see the names of the adults holding the position.



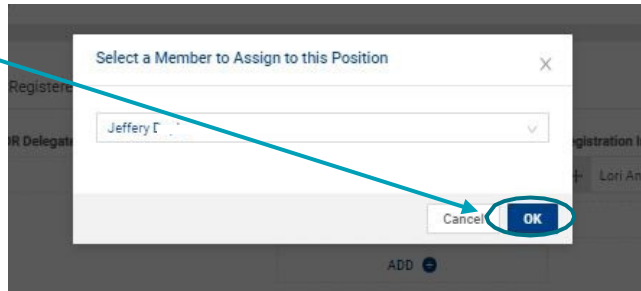
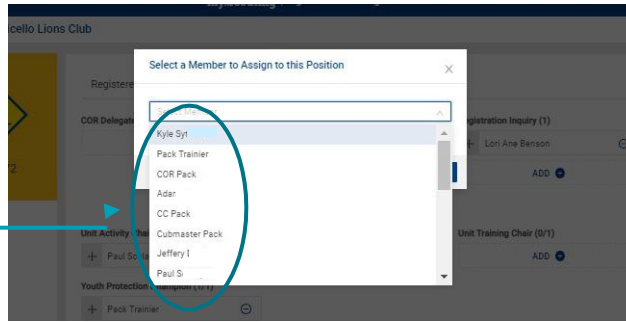
Step 2: To change a person out of a functional position:

- **Select the Blue Circle** beside the person's name.
- A pop up asking for the **Expiry Date** will appear. Put in the date that you want the position to change. If the Expiry Date you enter is greater than today's date, then the person will remain in the position until that date.
- If the Expiry date is today's date or before, **Select Expire Position** and the person will be moved out of that position and the **Add** button will show for that position.

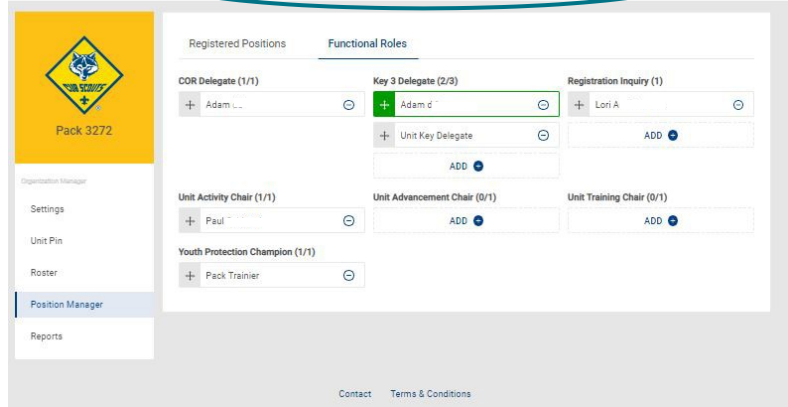
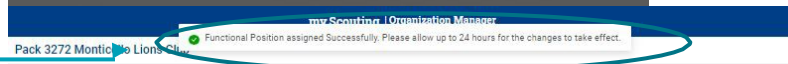


Step 3: To add a person to a functional position:

- **Select Add** for the role you wish to change.
- From the drop-down list **Select the Person's name** who you wish to assign to the role.
- Then **Select OK**.



- You will receive a message telling you the functional position was assigned successfully.
- **The position will take effect within 24 hours of making the change.**



Step 4: Save your changes

