

ASSIGNING REGISTRATION INQUIRY, KEY 3 DESIGNEE, AND COR/POST COMMITTEE CHAIR DELEGATE FUNCTIONAL ROLES

If your unit has adult volunteers who are helping manage unit recruitment and who need read only access to view leads and submitted requests in Invitation Manager and Application Manager you can assign them a functional role of “Registration Inquiry” in the system.

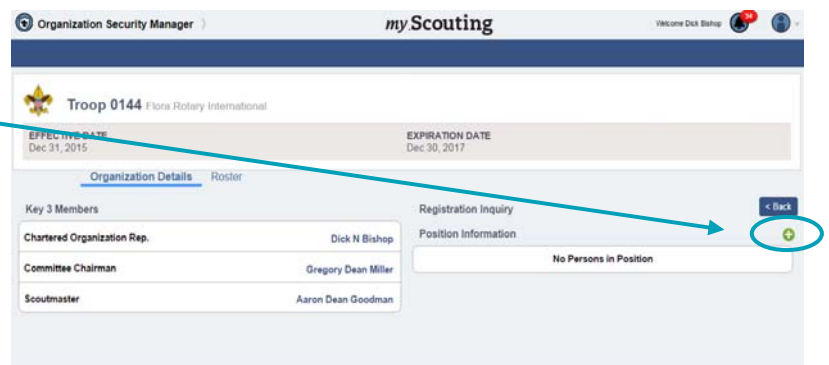
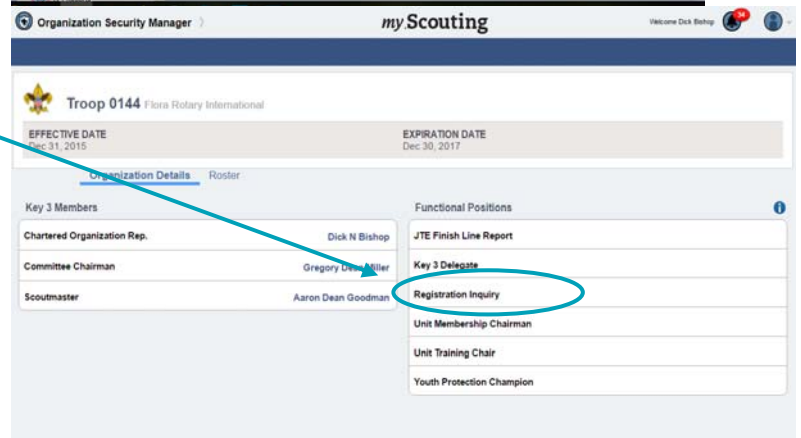
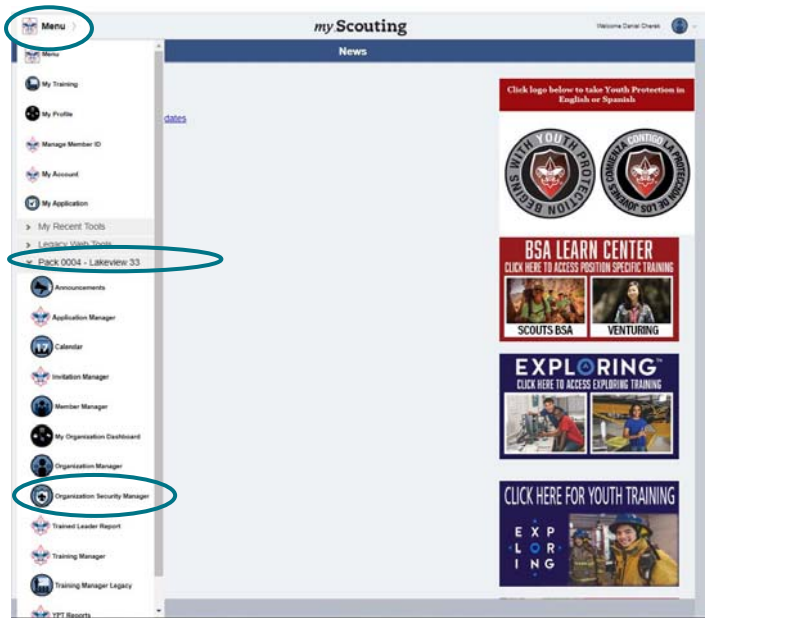
Step 1: While logged in to your My.Scouting account, select **Menu** at the top left-hand side of your screen.

Step 2: From the drop-down menu select the **unit** to which you want to add this functional role.

Step 3: Select **Organization Security Manager**.

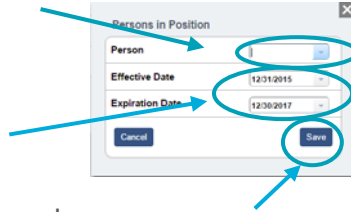
Step 4: Select **Registration Inquiry**.

Step 5: Select the **plus sign** to select the registered adult.



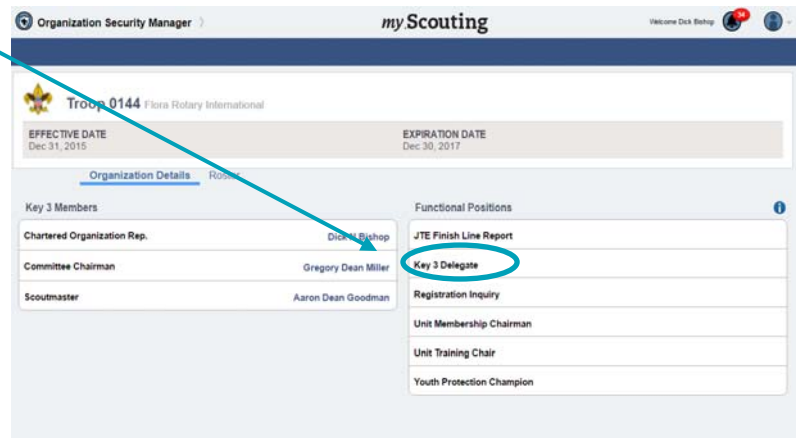
Step 6: Select the **person** from the drop-down menu. Only adults registered in your unit will show.

- You can set effective and expire dates for this role. Default is the unit effective and expire date.



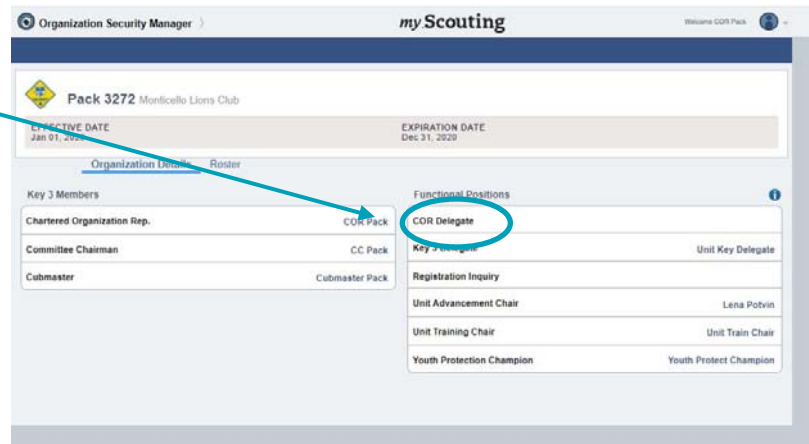
Step 7: Save. It may take overnight before the person assigned shows as a delegate in that position.

These same steps should be followed to add Key 3 Designees.



Only the COR/Post Committee Chair will have access to select a COR/Post Committee Chair Delegate in Organization Security Manager.

This role only applies to online registration only. Paper applications for adults must still be signed by the COR or Post Committee Chair only.



INVITATION MANAGER

KEY UNIT ROLES AND ACTIONS IN INVITATION MANAGER

The following unit positions have full access to the Invitation Manager Dashboard on My.Scouting where they can add leads, manage inquiries from prospective Scouts, and send joining invitations:

- Chartered organization representative (COR)*
- Committee chair (CC)*
- Unit leader (Cubmaster, Scoutmaster, Crew Advisor, Skipper, Coach, Post Advisor, Club Sponsor)*
- Institutional Head/Chartered Organization Executive Officer (IH)
- New Unit Coordinator
- Key 3 Delegate

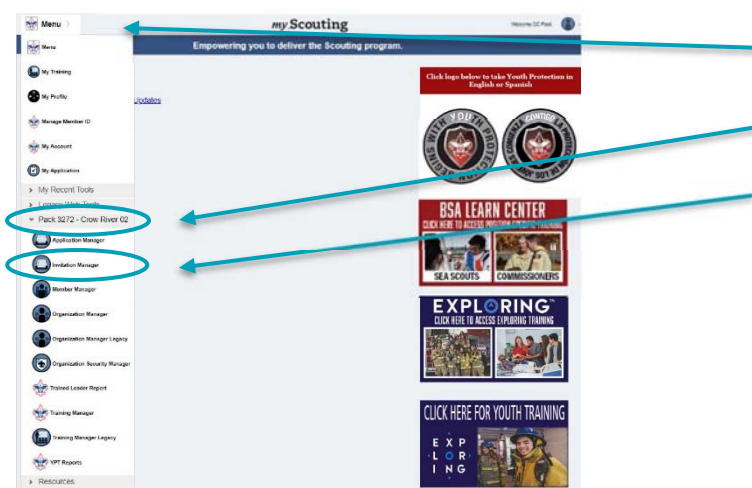
* = Members of the Unit Key 3

The Unit Key 3 can assign a “Registration Inquiry” functional role to other unit volunteers who need read only access to view lead status and submitted requests.

USING INVITATION MANAGER - OVERVIEW



To view and act on an inquiry that has been submitted to your unit, you'll want to log in to my.scouting.org.



Step 1: Select Menu in the upper left corner.

Step 2: Select your unit.

Step 3: Select Invitation Manager from the drop-down list.