



UNIT TRACKING FOR JTE



PURPOSE

This document is intended as a unit guide for gathering certain information needed to prepare their annual Journey to Excellence Scorecard (JTES). Specifically, all units are required to track and report youth advancement, unit service projects, and adult training. In addition, record keeping for other items such as camping trips, hikes, as well as youth training can be conveniently maintained using methods discussed in this document, and where appropriate guidance for doing so will be briefly mentioned.

GENERAL INFORMATION

Internet Advancement 2.0 (IA) is now the primary tool for recording and tracking unit advancement records. IA is now also the tool for recording unit service projects and their respective service hours, along with other unit activities such as camping trips and hikes. Significantly, but covered elsewhere, IA is now the tool for developing and submitting unit recharter application, replacing the now obsolete Internet Rechartering software. Training records are still maintained via My Scouting Tools (MST), however it should be noted that the procedures have been updated, while new reports have been made available to better assist the units in maintaining training records.

As many units have come to realize, there is substantial interaction among ScoutBook (SB), IA, and MST. For example, advancement records can be entered into SB, and they will automatically become available in IA, and MST. (*We have been assured that the synchronizations issues, that many experienced, are now a thing of the past.*) Further, there are links to go back and forth between SB and IA, while IA can be entered via the link in MST or directly by entering <http://advancements.scouting.org> into your internet browser. It is beyond the scope of this guide to delve further into this interrelationship. For present purposes, we will assume that the unit gets into IA and/or MST as needed in the method of their choice.

A WORD ON PASSWORDS AND AUTHORIZED ACCESS

The old paradigm, i.e., unit codes and unit created passwords, that served us well for many years, are now largely a thing of the past. The new paradigm is that access to IA (for advancement, activities, and rechartering) and MST (for unit training) is now automatically granted but only to those people with certain registered and /or functional (i.e., unit assigned) positions. Records can be viewed and edited by members of the unit key three (registered positions) or those assigned certain functional positions such as Key 3 delegate (same access as Key 3), or unit advancement chair, unit activity chair, or unit training chair. Please note that certain unit personal now have the ability to assign, renew, change and/or expire most registered and functional positions without going through their Council contact (there are a few exceptions that still require interaction with Council). Therefore, it is now the responsibility of the unit key three to see that everyone in their unit has the correct registered and/or functional position(s) needed to do the job they are assigned.

The good news is that whether you are using SB, IA, or MST, there is one and only one individual user ID and user password required. It is the same one you created when you created your MST account and the same one you use whenever you take an online training course through MST such as Youth Protection. If you ever need to change your ID or password, or any of your other personal profile information, you should do so through MST.

ADVANCEMENT JTE Item 5:

Your unit is responsible for ensuring that the advancement information for each Scout is correct and up to date in IA. Unit key three members, delegate key three members, and unit advancement chairs automatically have access to IA for the purpose of entering and updating unit advancement records.

Note to Scoutbook users: Units, if they so choose may also enter advancement records into SB, and these should flow automatically to IA. However, depending on how the unit chooses to set up SB, there may be a number of unit leaders, and parents, that can enter advancement information into SB, some of which requires additional approvals before the information is fully recognized in IA. Therefore, it is recommended that Scoutbook users appoint a single person, such as an advancement chair, to verify that everything is showing correctly in IA regardless of how and by whom the information was originally entered.

SERVICE HOURS AND OTHER ACTIVITIES JTE Items 6,7,8:

As in the past, JTE item 8--**Service Projects** requires units to “enter the hours on the JTE website” to get credit for unit service projects. However, while the wording on the JTE scorecard is the same as in previous years, the method for logging unit service projects has changed. In the past, units logged service projects directly into the National Service Project Data Base using an account (i.e., log on ID and password) created by the Unit. Today, unit service projects (see exception for Eagle projects below), are entered as an ACTIVITY in Internet Advancement (IA).

Hint: While there are no specific recording requirements for unit hikes and camping trips, JTE items 6 and 7 do require units to keep track of their outdoor activities and participation in long term camping in a manner of their own choosing. The ACTIVITY feature in IA, that is required for recording Service Projects, can also be conveniently used for tracking other outdoor activities.

The registered members of the unit Key Three, all delegate Key Three members, and the unit Advancement Chair, have full access to enter and edit unit activities (e.g., service projects, camping trips and hikes) in IA. Assistant Scoutmasters, Den Leaders (for their own den), Unit Scoutbook administrators and Unit Scoutbook Activity Chairs can record completed activities in IA, while parents/youths can record completed activities for their child/self in IA.

Those with access should find an ACTIVITIES option on the left hand menu of their IA opening page. Select ACTIVITIES, then the large plus sign on the right to enter a new activity, or the calendar bar just below to view or edit existing activities. For a service project select SERVICE HOURS (other options are CAMPING or HIKE.) Next, supply the requested information such as dates, hours, project descriptions and people in attendance. (*Hint: you will be asked for the names of unit registered youths and adults that participated in the project. Some may find it more convenient to start out in ROSTER, select the names of the participants, then select RECORD PROGRESS, and the type of activity. You will then have the option to create a new activity but with the participant names already populated.*)

At the time of this writing, **Eagle Projects** are still entered directly in the National Database as was done in past years. These are usually entered automatically as part of the Eagle Application review performed by Council. However, units can still view previously recorded Eagle projects, and for a limited time period, still edit a few items (most commonly done when the final project hours have changed from the application hours), by using their existing National Service Hours database log on credentials (so don't discard those old log-on IDs and passwords your unit created just yet).

TRAINED LEADERSHIP JTE Item 10:

Please ensure that all training records are kept up-to-date in My Scouting Tools (MST). A recent update to **Training Manager (TRMG)** in MST now provides several useful tools for managing unit training records. Key three members in each unit, as well as delegate key three members and unit training chairs can view and update training records for all registered adults and now also all registered youths in their respective unit.

To do so, log on to your MST account, and select Training Manager. This will open the TRMG menu and, normally, default you to the TRMG DASHBOARD screen where you will see a status summary of position specific trained adults (left side) and adults with a current youth protection (YPT) certificate (right side).

To **view or update training records**, from the TRMG menu, select ADD/SEARCH and when the new panel opens select either SEARCH TRAINING OR ADD TRAINING.

To view an individual training record, select SEARCH TRAINING. This will open a roster of all currently registered adults and youths in the unit. To see the training record for any individual, select the name from the roster, then VIEW TRAINING.

To update an individual training record, select ADD TRAINING, then select the program, course, and date of the training to be updated, then name of the individual (adult or youth) whose record you wish to update, and finally ADD MEMBER.

Back on the main TRMG menu, you can also select QUICK SEARCH. This option may be helpful for viewing the training records of someone that is not on the current registered roster for the unit.

Finally, from the main TRMG menu, select REPORTS to view a list of training related reports that can be run. Some of these reports are new, and most have the option to view or print in multiple file formats. Probably the most useful for recharter purposes are the TRAINED LEADERS REPORT AND THE YPT AGING REPORT printed in PDF format, as these are similar to those that were previously asked for in the recharter package checklist.