

Order of the Arrow Membership Verification

Background There was previously no automated method to match an OA member file with registered youth and adults to determine if all OA members are registered.

Overview This document explains a new process in ScoutNET to upload a file provided by an OA lodge of its OA members. The council will be able to upload the file to PAS and match the OA member records to PAS records of current paid registrants in traditional units and in non-unit positions. Then the council can run the reports and provide them to their Order of the Arrow lodge so it can determine lodge members who do not have current, paid registrations. The development of this new process was sponsored by the Order of the Arrow.

Role The rights to upload and process the OA Membership Verification and to obtain the output is available to council users having any of these roles:

- Council Scout Executive
 - Council PAS System Administrator
 - Council Registration Manager
 - Council Registration User 1
 - Council Events Manager
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Create the Input File

Overview You must create a file of OA members using the criteria listed in this section. The file must follow these guidelines to be successfully uploaded to PAS.

File Format The file created outside of ScoutNET and containing Order of the Arrow members must be saved in comma-delimited (csv) format. This input file should contain one record for each dues-paid OA member in the lodge. Each record will contain the following data elements with the maximum length of characters in the order shown:

- BSA Person ID: 15 numbers, left-justified with no leading zeroes
 - Lodge Record ID: 15 numbers (lodge provided data)
 - First Name: 35 alphanumeric characters
 - Middle Name: 35 alphanumeric characters
 - Last Name: 35 alphanumeric characters
 - Suffix: 6 alphanumeric characters
 - Date of Birth: 8 or 10 alphanumeric characters in either of these formats: mmddyyyy or mm/dd/yyyy
 - Gender: Either M or F
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Sample File



Person ID	Lodge ID	First Name	Middle Name	Last Name	Suffix	DOB	Sex
102336323		John	Joseph	Jones	Jr.	12/18/1990	M

Save the File Save the file somewhere easy to remember with the file name of **oaupload**. The file extension must be **.csv**.

Upload Process

Overview

When the upload file has been created, you can transfer the members to PAS. The following procedure explains the upload process.

Step	Action
1	<p>From the main ScoutNET menu, place the cursor over the Upload button and click OA Membership Verify from the list of options.</p> 
2	<p>At the Upload Type window, click the Browse button and find your csv file. Then click the Upload button.</p> 
3	<p>When the file is uploaded, a message indicates, Upload Successful. Click OK.</p>
4	<p>Within the next 15 minutes, the file name will appear in the repository. Confirm the file in the repository before continuing. The file name will be OA MS Verify Upload Confirmation.</p>

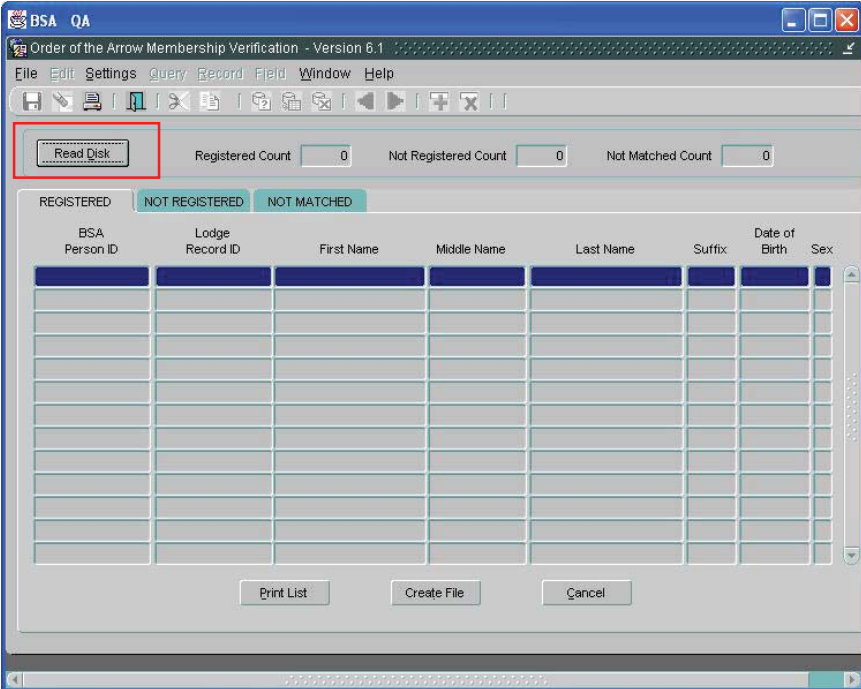
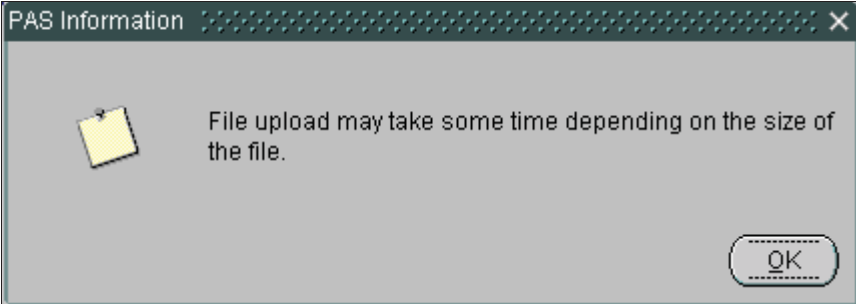
Read Disk Process

Overview Once the file has been uploaded, you can begin the process of reading the individual member records.

Step	Action
1	<p data-bbox="553 499 1268 562">From the ScoutNET menu, select Membership, then OA Membership Verification.</p> <div data-bbox="553 569 1349 1367" style="border: 1px solid gray; background-color: #f0f0f0; padding: 5px;"><p data-bbox="565 575 805 604">- Membership</p><ul data-bbox="643 617 1341 1367" style="list-style-type: none"><li data-bbox="643 617 1081 646">Additional Enrollments<li data-bbox="643 659 1179 688">Registrant Print Selections<li data-bbox="643 701 935 730">Charter Renewal<li data-bbox="643 743 919 772">Unposted Units<li data-bbox="643 785 959 814">Unit Maintenance<li data-bbox="643 827 1341 856">Lone Cub Scouts and Lone Boy Scouts<li data-bbox="643 869 1276 898">Electronic Fund Transfer Details<li data-bbox="643 911 878 940">List Batches<li data-bbox="643 953 1179 982">Add Boys' Life Subscription<li data-bbox="643 995 1243 1024">School Affiliation Maintenance<li data-bbox="643 1037 1300 1066">Distribute PAS Transactions to GL<li data-bbox="643 1079 1122 1108">Registration Print Queue<li data-bbox="643 1121 1000 1150">Membership Reports<li data-bbox="643 1163 1057 1192">View Print Selections<li data-bbox="643 1205 862 1234">Enter Goals<li data-bbox="602 1247 1146 1276">+ Criminal Background Check<li data-bbox="602 1289 1203 1325" style="border: 1px solid red;">OA Membership Verification<li data-bbox="643 1331 1179 1360">Unit Charter Renewal System</div>

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Read Disk Process, Continued

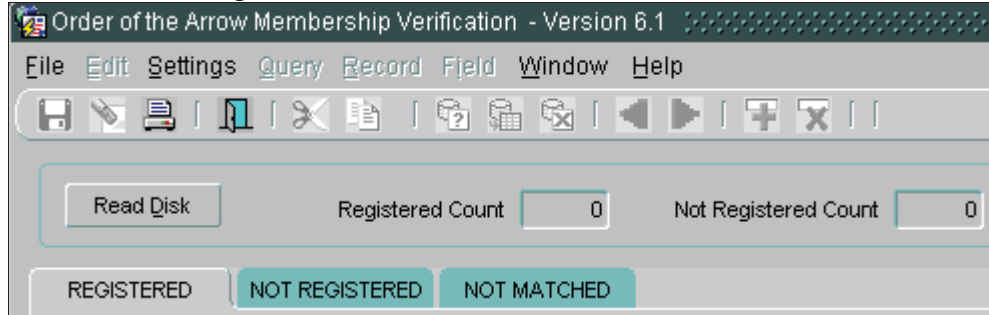
Step	Action
2	<p>At the Order of the Arrow Membership Verification screen, click the Read Disk button.</p> 
3	<p>A message indicates that the read disk process may take some time. Click OK to continue.</p> <p>The system searches for the file you uploaded. If the file is not in the correct format, this message appears:</p>  <p>During the upload process, the system checks for matches in person ID, last name, date of birth, and sex in the uploaded file. If one of these fields is invalid, the process will stop at that point.</p>

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Read Disk Process, Continued

Matching Records Counts

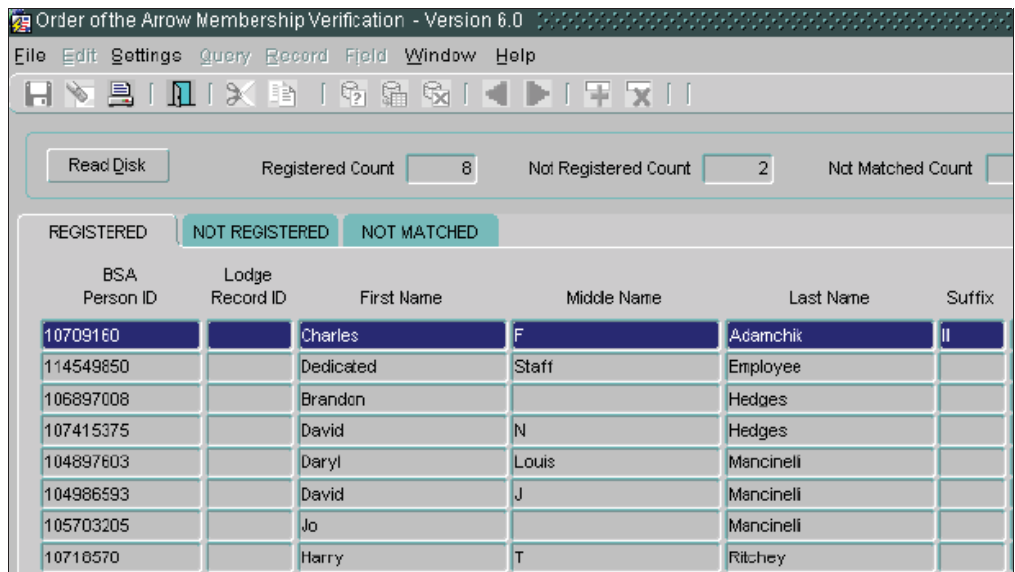
When the matching process completes, the number of records in each category—registered, not registered, not matched—is displayed at the top of the screen. A sample counts screen follows:



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Read Disk Process, Continued

Upload Results When completed, the names of the individuals successfully uploaded to PAS will appear. All the fields uploaded, including person ID, lodge record ID, first name, middle name, last name, suffix, date of birth, and sex, are displayed. A sample completed screen follows:



The screenshot shows the 'Order of the Arrow Membership Verification - Version 6.0' application window. At the top, there is a menu bar with 'File', 'Edit', 'Settings', 'Query', 'Record', 'Field', 'Window', and 'Help'. Below the menu bar is a toolbar with various icons. The main interface features a 'Read Disk' button and three status boxes: 'Registered Count' with the value '8', 'Not Registered Count' with the value '2', and 'Not Matched Count' which is empty. Below these are three tabs: 'REGISTERED', 'NOT REGISTERED', and 'NOT MATCHED'. The 'REGISTERED' tab is selected. Underneath the tabs is a table with the following columns: 'BSA Person ID', 'Lodge Record ID', 'First Name', 'Middle Name', 'Last Name', and 'Suffix'. The table contains eight rows of data.

BSA Person ID	Lodge Record ID	First Name	Middle Name	Last Name	Suffix
10709160		Charles	F	Adamchik	II
114549850		Dedicated	Staff	Employee	
106897008		Brandon		Hedges	
107415375		David	N	Hedges	
104897603		Daryl	Louis	Mancinelli	
104986593		David	J	Mancinelli	
105703205		Jo		Mancinelli	
10718570		Harry	T	Ritchey	

The **Registered** tab is selected in this example. This view shows the number of people matched with current, unexpired, paid traditional registrations as of the system date when the file was processed.

The **Not Registered** tab will show the number of people with a matching record in PAS, and who do not have a current, unexpired, paid traditional registration as of the system date when the file was processed.

The **Not Matched** tab will show the number of people not matched, that is, there was no match based on the matching criteria, regardless of whether or not the person might have a current, unexpired, paid traditional registration as of the system date when the file was processed.

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Read Disk Process, Continued

Output Options These options are available after the Read Disk process is completed:

Print List: Print a list of uploaded members. The names of the reports as they appear in the repository are:

- OA Registered Member List
- OA Not Registered Member List
- OA Not Matched Member List

Create File: Create a file of uploaded members. The names of the files as they appear in the repository are:

- OA Registered Export File
- OA Not Registered Export File
- OA Not Matched Export File

Provide these to your OA lodge to contact members not registered. Also, use the information for members not matched to check that the information is correctly stored in PAS. If there was no match and the person is in the PAS database, there is a discrepancy in one of the four matching fields: person ID, last name, date of birth, or sex.

Cancel: Exit the screen; the information on the screen is not saved.

Sample Output File









Sample File Following is a sample of the OA data output file. The **Status Code** column will have a 1, 2, or 3, corresponding to registered, not registered, and not matched respectively.



Person ID	Lodge Record ID	First Name	Middle Name	Last Name	Suffix	DOB	Sex	Status Code
4281945		Ali	A	Aley	MD		M	1
102336323		Calvin	F	Anderson			M	1
4280460		Paul	Michael	Anderson			M	1
4282236		Ronald	O	Anderson			M	1
107332075		Jon	Michael	Andes			M	1
110606576		Kyle	R	Andrews			M	1
4282347		Jeff	L	Archey			M	1
106707197		Laurel	C	Archey			F	1
4281423		Matthew	Scott	Archey			M	1
4281422		Nathan	Donald	Archey			M	1
10774557		Christopher	M	Arnold			M	1
108367789		Kathy	L	Arnold			F	1

Sample Reports

Overview

Following are examples of the reports printed from the Order of the Arrow membership verification process. These reports include bar codes that represent the person ID. The council can scan the bar code on the reports to quickly find the person's record in PAS.

Sample Registered Member Listing							
Report ID: 6.0		Order of the Arrow Membership Verification Report					
Run Date: 2/2/2005		<u>Registered Listing</u>					
Run Time: 9:21:26PM		-----					
Number of Records Returned on this Listing: 8							
<u>Bar Code</u>	<u>Person ID</u>	<u>Lodge ID</u>	<u>First Name</u>	<u>Middle Name</u>	<u>Last Name</u>	<u>Suffix</u>	<u>Birth Date</u>
	10703160		Charles	F	Adamchik	III	
	114549850		Dedicated	Staff	Employee		
	106697009		Brandon		Hedges		
	107415375		David	N	Hedges		
	104897603		Daryl	Louis	Mancinelli		
	104966593		David	J	Mancinelli		
	105703205		Jo		Mancinelli		
	10718570		Harry	F	Ritchay		
---End of Report---							

Sample Not Registered Members Listing							
Report ID: 6.0		Order of the Arrow Membership Verification Report					
Run Date: 2/2/2005		<u>Not Registered Listing</u>					
Run Time: 9:31:46PM		-----					
Number of Records Returned on this Listing: 2							
<u>Bar Code</u>	<u>Person ID</u>	<u>Lodge ID</u>	<u>First Name</u>	<u>Middle Name</u>	<u>Last Name</u>	<u>Suffix</u>	<u>Birth Date</u>
	111766921		Dakota	J	Allgood		
	105436542		Sandra		Stephenson		
---End of Report---							