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

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: 6 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
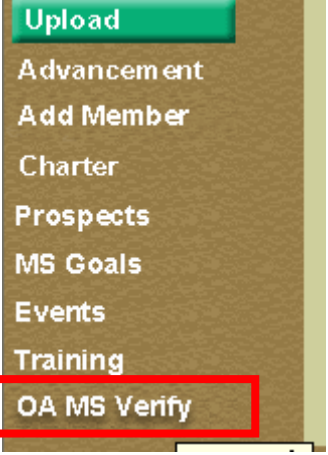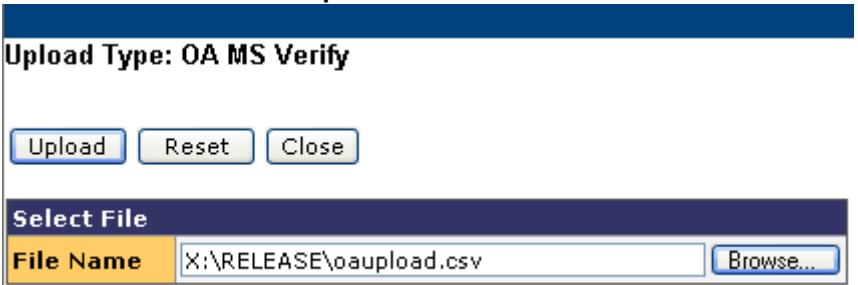- Gender: Either M or F

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**.
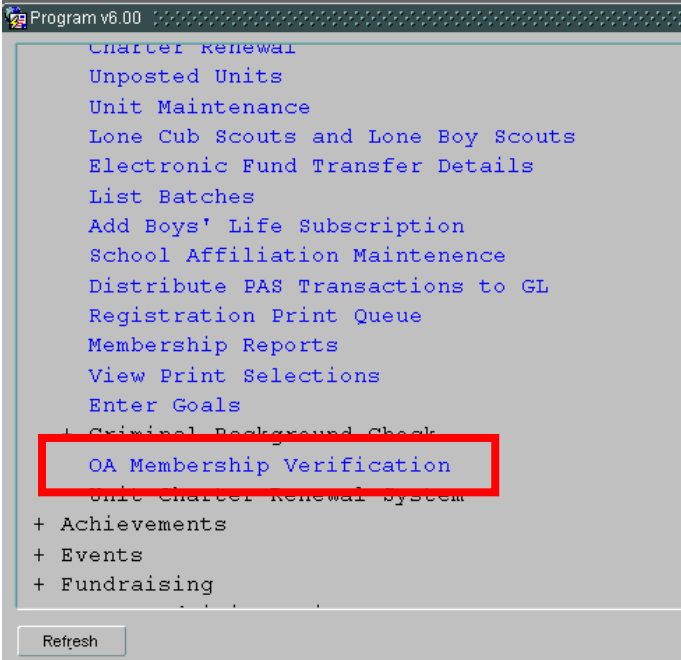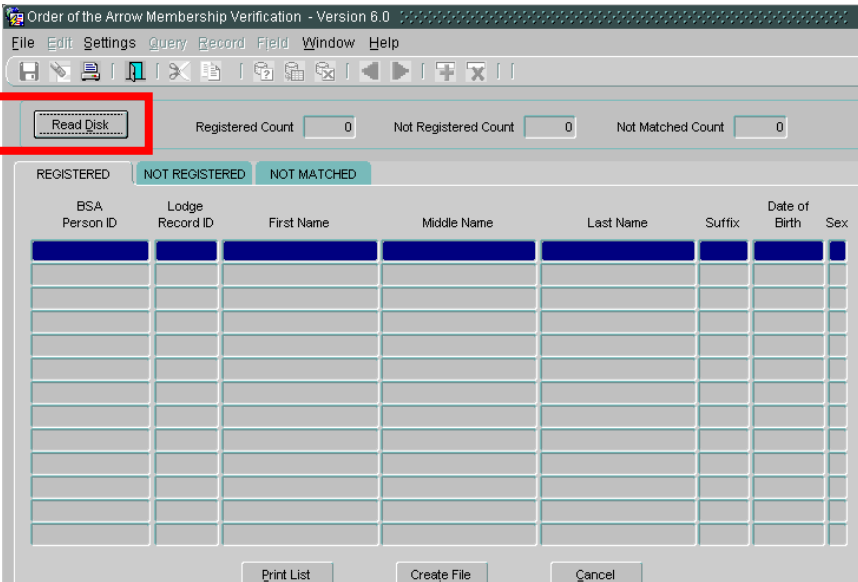
Upload Process

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	From the main ScoutNET menu, place the cursor over the **Upload** button and click **OA Membership Verify** from the list of options. Upload Advancement Add Member Charter Prospects MS Goals Events Training **OA MS Verify**
2	At the **Upload Type** window, click the **Browse** button and find your csv file. Then click the **Upload** button. **Upload Type: OA MS Verify** Upload Reset Close **Select File** **File Name** X:\RELEASE\oaupload.csv Browse...
3	When the file is uploaded, a message indicates, **Upload Successful**. Click **OK**.
4	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**.

Read Disk Process

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

Step	Action
1	From the ScoutNET menu, select **Membership**, then **OA Membership Verification**.
2	At the Order of the Arrow Membership Verification screen, click the **Read Disk** button.

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Read Disk Process, Continued

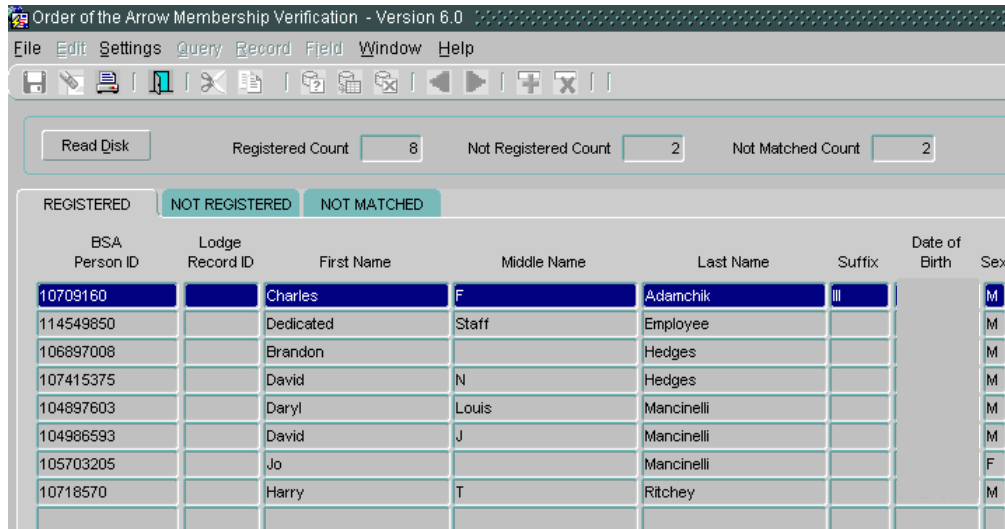| Step	Action
3	A message indicates that the read disk process may take some time. Click **OK** to continue. The system searches for the file you uploaded. If the file is not in the correct format, this message appears: During the upload process, the system checks for matches in person ID, last name, date of birth, and sex in the uploaded file. If one of these fields is invalid, the process will stop at that point.

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:

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 **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	Alley	MD		M	1
102336323		Calvin	F	Anderson			M	1
4280460		Paul	Michael	Anderson			M	1
4282235		Ronald	O	Anderson			M	1
107332075		Jon	Michael	Andes			M	1
110606576		Kyle	R	Andrews			M	1
4282347		Jeff	L	Archey			M	1
10670719 7		Laurel	C	Archey			F	1
4281423		Matthew	Scott	Archey			M	1
4281422		Nathan	Donald	Archey			M	1
107774557		Christopher	M	Arnold			M	1
108367769		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                                    Registered Listing
Run Time:  9:21:26PM
----------------------------------------------------------------------------------------------------
Number of Records Returned on this Listing: 8

Bar Code            Person ID  Lodge ID    First Name        Middle Name    Last Name         Suffix   Birth Date

|||||| ||| || |||||||||| ||| |||   10709160              Charles          F              Adamchik          III

|||||||| ||||| |||||||||| ||| |||   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

                                        ---End of Report---
```

Sample Not Registered Members Listing

```
Report ID: 6.0                          Order of the Arrow Membership Verification Report
Run Date:  2/2/2005                                  Not Registered Listing
Run Time:  9:31:46PM
----------------------------------------------------------------------------------------------------
Number of Records Returned on this Listing: 2

Bar Code            Person ID  Lodge ID    First Name        Middle Name    Last Name         Suffix   Birth Date

|||||||||| |||||||||||||| |||| |||   111766931             Dakota           J              Allgood

|||||| |||||| ||| ||||||| ||||| |||   106436542             Sandra                          Stephenson

                                        ---End of Report---
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