Customer Renewal (Self-Serve from MyGS)

Name	Number	Last Updated
Customer Renewal	002	3/17/2022

Process Overview

This Quick Reference Guide [QRG] will cover how a caregiver would renew a member (or multiple members) of their household. Members can have their membership renewed in the following ways:

- By renewing themselves from their MyGS MyAccount.
- By requesting assistance from staff who will use Assisted Services Mode [ASM]. Also see QRG Introduction to ASM.
- By their troop leader (which is covered in QRG Troop Renewal Thru ASM or QRG Troop Renewals Volunteer Facing)

In Volunteer Systems 2.0, **caregivers have more transparency and options to self-manage their accounts**. The Membership Status field makes it easier for caregivers to see updates in real time. The "Time to Renew" update is automatic and affects every Active Membership on April 1 at the launch of the GSUSA Early Renewal Campaign. Additional Membership Status updates (such as Payment Pending) are triggered throughout the registration process and the Person Account record is updated to "Active" status in Salesforce.

In VS 2.0, it is possible that if a girl is affiliated to more than one household that someone other than her primary caregiver (or troop leader) could renew her; assuming the caregiver in another household is her "additional caregiver." If one caregiver (or troop leader) renews the girl, the status updates (usually within a minute or so pending any financial assistance or program credit that need to be applied) and the other caregiver will see the girl's status change to active (no longer "time to renew"). This limits the possibility that both caregivers might renew the girl.

There are situations where the caregiver will not renew everyone in their household. Members who confirm they will not be returning for another year can be marked Not Returning. If they change their mind and want to renew later, caregivers can complete the membership renewal and choose a different troop, different roles, or a different participation option altogether. If they wish to return to the same troop or role, they will need assistance from the council. The council will have to uncheck "Not Returning" on their person account or role. This is shown in the QRG Troop Renewal through ASM.

GSUSA Guidance

Although caregivers can complete the renewal online, there are situations where caregivers will contact council directly for help. Assisted Services Mode [ASM] allows staff to support customers with a My Account login. Using ASM allows council staff to update the account as if they were the customer.

Some situations where caregivers are likely to contact council include those who need help setting up their My Account, those who were lapsed prior to 2020, anyone transferring to another council, and situations where the girl is in multiple households. Links to relevant QRGs are at the end of this document.

In November 2020, current Girl Scout members were migrated to Volunteer Systems 2.0, and caregivers were asked to set up their MyAccount. If they have not yet done that, they'll need to verify their account before they can renew their girl and any other household members. Anyone who was a member before 2020 and didn't renew in 2020 is considered lapsed. Lapsed members who did not migrate in November will need to register as a new member.
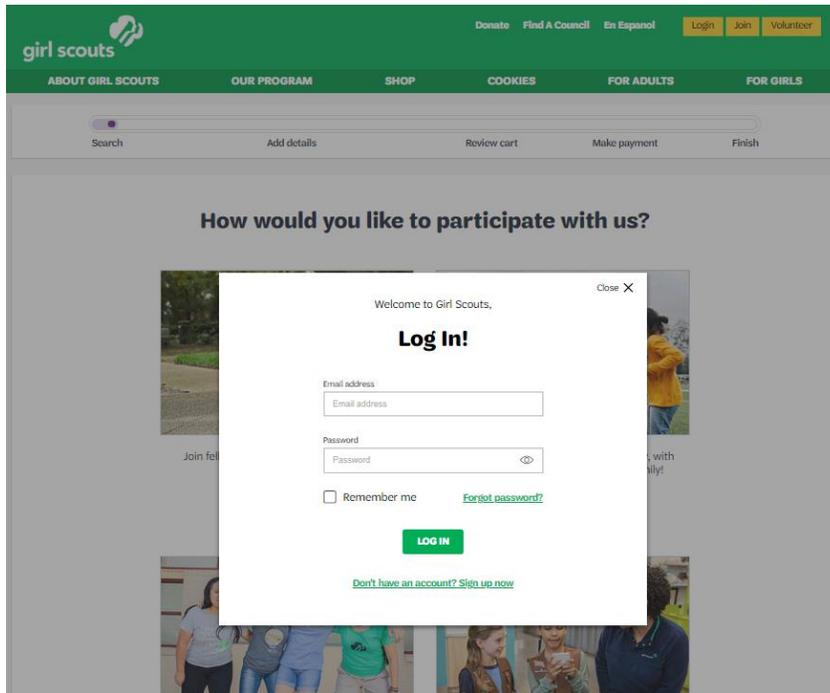
Guide

Caregiver Household Renewals

Beginning April 1, adults with a MyAccount can renew Girl Scout memberships for members of their households.

Step 1A. Caregiver will start from the council's website link. Then log in to their MyAccount from the Log In window.
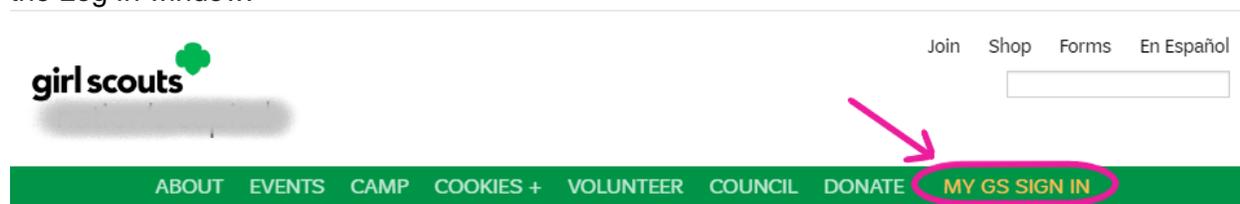
Existing members should log in with their credentials. If they have forgotten their password, they should use the "forgot password" link. If they have forgotten their email address, they should call the council to request it.
Existing members should not use "Don't have an account? Sign up Here" link. See troubleshooting at the end of this document and Additional Resources.

OR Step 1B. Staff assisting a caregiver will search for the caregiver account in ASM. Then click "Start Session"
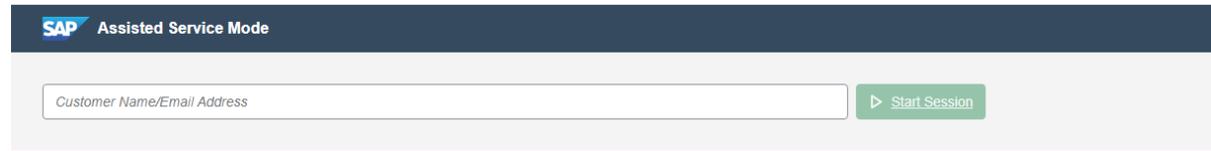
If the household account does not immediately open, click on MyAccount in the top header of the page.
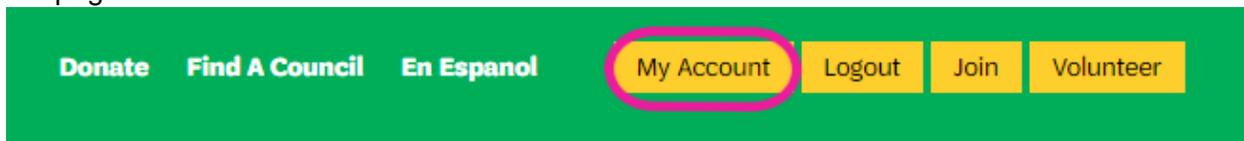
Step 2. Click on My Household

**Welcome,
Amber Werner!**

My Account

My Household

My Troop(s)

My Profile

My Events

Volunteer ToolKit

gsLearn

Caregivers will make a choice about their household participations, including renewing to existing troop and volunteer roles, selecting a different troop **Change my participation ⇄** adding an additional troop **Add a troop >** or choosing another role.

During renewal girls who have an Independently Registered Girl [IRG] participation can renew their IRG participation. If they wish to join a troop, they can use **Add a troop >** to find a troop. Change participation does not work since the girl does not have a "troop" to change. A troop member who wishes to become an IRG will need council assistance to change to IRG.

Step 3. Make selections.
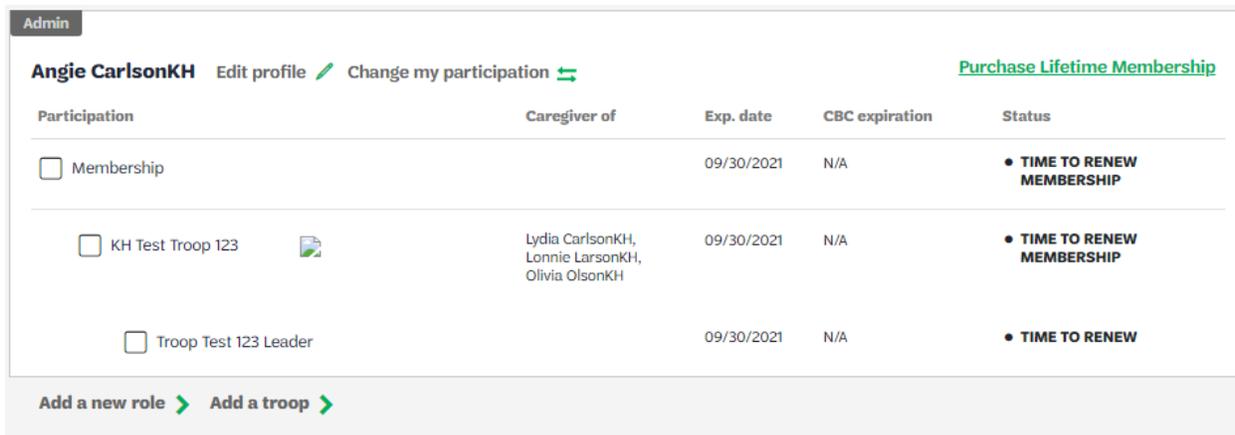
Admin					
Angie CarlsonKH Edit profile ✏ Change my participation ⇄					**Purchase Lifetime Membership**
Participation		**Caregiver of**	**Exp. date**	**CBC expiration**	**Status**
☐ Membership			09/30/2021	N/A	● **TIME TO RENEW MEMBERSHIP**
☐ KH Test Troop 123		Lydia CarlsonKH, Lonnie LarsonKH, Olivia OlsonKH	09/30/2021	N/A	● **TIME TO RENEW MEMBERSHIP**
☐ Troop Test 123 Leader			09/30/2021	N/A	● **TIME TO RENEW**

Add a new role >   Add a troop >

For adults: Select the membership and select any troops or roles by ticking the checkboxes. Select All to renew a membership, troop affiliation and a volunteer role; or check those that apply:

    a. Check the membership box to renew a membership (not necessary for existing Lifetime Members).
    b. Check the troop box to renew a troop participation affiliation.
    c. Check the volunteer role to renew the position.

If all 3 boxes are checked, the status for all three will change from "Time to Renew Membership" to "In Cart."

They may also decide to mark a member of their household's troop participation and/or troop volunteer role as "Not Returning" to indicate to their troop leader and council that they are not

renewing. "Not Returning" is located to the right of the status. It is not pictured in the screenshot above.

For girls: Select the participation(s) you wish to renew. If there are multiple girls in the household who will be renewing all participations you can check the "select all" option above the girl members list.
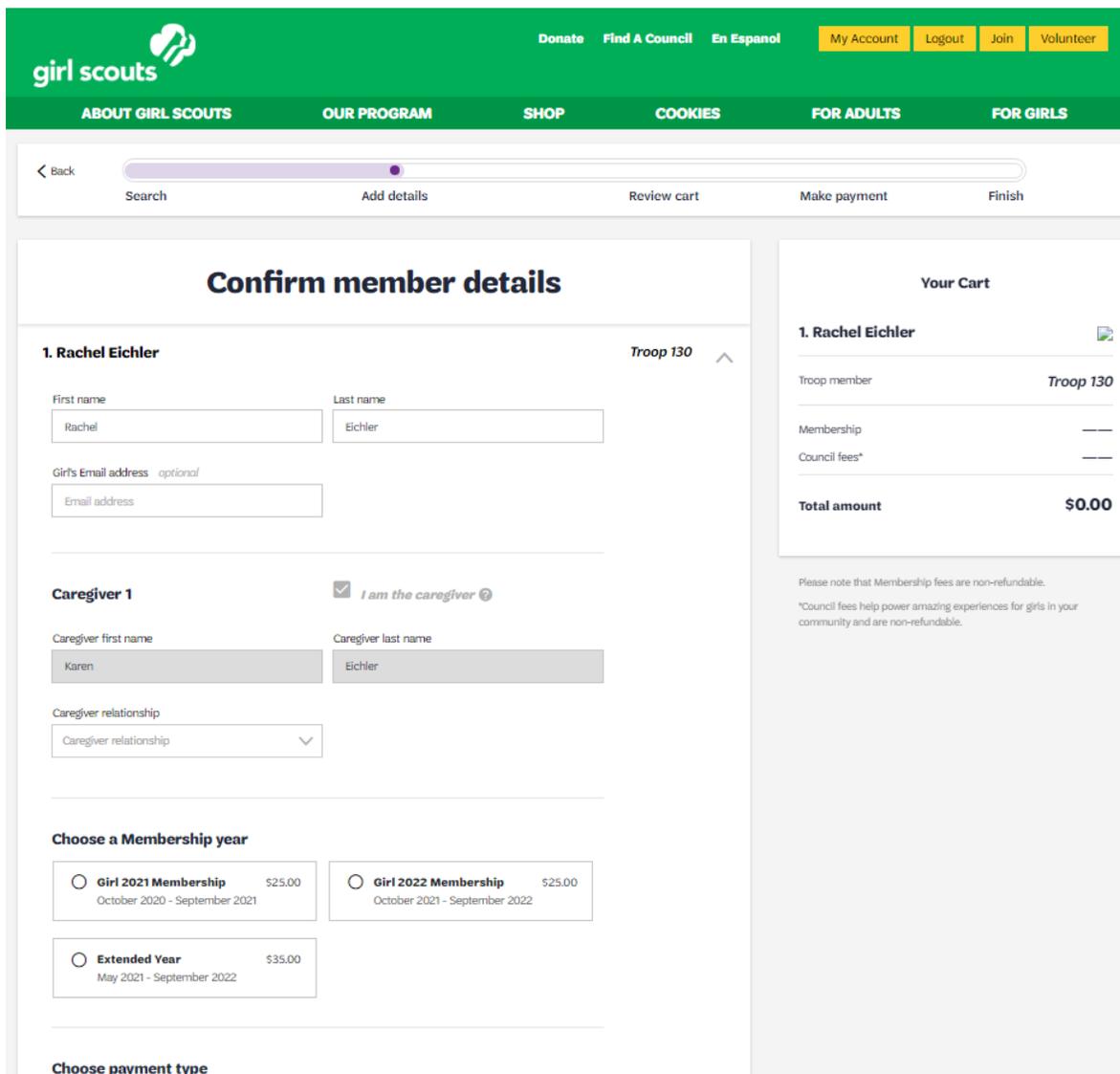The status for all will change from "Time to Renew Membership" to "In Cart."
They may also decide to mark a member of their household's troop participation as "Not Returning" to indicate to their troop leader and council that they are not renewing.

Click "Renew"

Step 4. Confirm Member Details for each member:

a. Confirm name. If desired, provide optional email address for girls 13 and over.
b. Confirm primary caregiver and relationship
c. Choose a membership year product
   a. Caregivers will not see all the options shown above—only the option that is available to them. For example: a 2022 renewing girl member will only have the option to select a Next Year 2023 membership. See the QRG Product Availability.
   b. No Cost or $0 Product may appear. This is used when a member is already current on membership but wishes to renew participation to a troop or role.
   c. Graduating girls have the option to become young alum and pay a discounted lifetime membership fee. See QRG Special Circumstances Lifetime Membership.
   d. Graduating girls will also have the choice to renew as an annual adult member without requiring a troop role/participation.

    e. Current Lifetime Members only renew their roles and do not pay the annual membership fee. See QRG Lifetime Members Renewing Roles and Participations.

Step 5. Choose payment type:

    a. Credit card: leaders choose credit card when a troop credit card will be used as the payment method. Payment is processed immediately at checkout. The membership status updates to Active, and the girl has secured a spot in the troop for next year.

    b. Apply for Financial Aid [FA]: troop leaders can only select FA for members of their household; they cannot select FA on behalf of troop members.

- Offering FA in the storefront is a council decision.
- If a caregiver requests FA for their girl, her renewal must be processed by the council. Her renewal will remain in pending status until the council approves the requested aid and completes the renewal registration. Until then, leaders see that the renewal is pending, and an open spot remains in the troop.
- Caregivers will see that a balance is due on the account. When the council approves the payment, the balance due message disappears, and the member status updates to Active.

    c. Apply to use Program Credits [PC]: troop leaders can only select program credits if your council allows this.

- Offering PC in the storefront is a council decision.
- If a caregiver requests PC for a girl, her renewal must be processed by the council. Her renewal will remain in pending status until the council approves the request and completes the renewal registration. Until then, leaders see that the renewal is pending, and an open spot remains in the troop.
- Caregivers will see that a balance is due on the account. When the council approves the payment, the balance due message disappears, and the member status updates to Active.

> Note that the system updates to active in the customer's MyAccount but will appear as pending in Salesforce until the beginning of the membership year.

Click Next Participant (If no additional participants the button becomes Submit Member Details. Click Submit.)

If you receive an error message, see the troubleshooting section at the end of this document.

Step 6. Next Participant. Repeat the above steps for each member who is renewing

Step 7. When all member details are submitted, Click Review Cart:
    a. Review and edit, if necessary
    b. Check to accept the Girl Scout Promise and Law
    c. Click Add Payment Details button

Step 8. Payment Details:
a. Enter payment details
b. Click Submit Payment to complete renewal
c. Confirmation screen will appear with option to manage my account
d. Caregiver will receive an email payment confirmation
e. A detailed receipt can be printed by clicking on the caret next to the total dollar amount. It is not currently possible to re-print a receipt after leaving this screen.

Optional Step 9. Click the manage my account button on the confirmation screen to return to the account and update girls' and adults' profiles. Update contact information and/or girls' schools as needed.

If a caregiver requests financial aid or program credits for their girl, her renewal must be processed by the council. Her renewal will remain in pending status until the council approves the requested financial aid or program credits and completes the renewal registration. Until then, leaders see that the renewal is pending, and an open spot remains in the troop. Caregivers will see that a balance is due on the account. When the council approves the payment using financial aid or program credits, the balance due message disappears, and the member status updates to Active Member.

If a caregiver is also a volunteer, they may be required to renew a background check in addition to the membership renewal, troop renewal, and role renewal, depending on when they last passed the volunteer screening and what the council and the state requires.

An additional note: some volunteer roles are built in the system as non-renewable. Some roles also require special handling or appointment by a council employee.

Troubleshooting

- If the caregiver is having trouble logging in see the QRGs listed below.
- If the caregiver is logged in and doesn't see the expected members of the household, check the following:
    - Caregiver has a date of birth and valid email address is in the "Email" field. (Not just the work email or home email or other email fields) in the Individual record.
    - Caregiver has the "grant access" box checked on the person account. Sometimes unchecking, saving, then rechecking and saving helps refresh the visibility.
    - Look at the household record and verify household members are listed, have a type and are active. (This does not mean the listed individual is an active Girl Scout member-just that they appear within their household.)
    - Check records to ensure that all have a Global ID. If no Global ID, you will have to create a new record and manage duplicates. See Business Process Duplicate Managment.
    - Check in Salesforce on the caregiver's person account that the caregiver has a household role.

∨ Person Information

Role

Parent;Adult ✎

- o   Check in Salesforce on the caregiver's Individual account that the caregiver has a date of birth and both an email address in the "Email" field and postal address.

- o   If you receive an error stating "double check your cart", remove the participant so that the rest of the members can be renewed. Complete the renewal. Open the girl record in Salesforce. Ensure that the girl does NOT have her caregiver's email address on her record. If necessary, change the girl email to GlobalID@noemail.gs. Save changes in Salesforce. End Session in ASM and start a new session in the caregiver account and try renewing the individual again.

System Integration

Spartacus Customer interface	• Integrates with Hybris and Salesforce to display appropriate information for account management and renewal decision-making
Hybris eCommerce platform	• Creates renewal order for purchase • Drives order processing by sending required information downstream
Salesforce CRM platform	• Integrates with Spartacus to update Person Accounts according to renewal • and account management activity
NetSuite Subledger platform	• Creates invoice and payment for renewal purchase

Additional Resources

Quick Reference Guide Account Creation Account Edit

Quick Reference Guide Legacy Login

Quick Reference Guide Email Not Received