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## SCOUTBOOK MERIT BADGE COUNSELOR GUIDE

This guide is for councils that have uploaded their merit badge counselor list to Scoutbook  
MERIT BADGE COUNSELOR GUIDE.

To be a merit badge counselor you must register with the BSA at your council for the position and to be approved to counsel certain badges. For details on how to register, contact your council service center.

Once registered with the BSA as a merit badge counselor, your merit badge counselor position will be added to Scoutbook. If you do not already have a Scoutbook account, an account will be created for you and you will be sent login information by email.

You can adjust how you display on the list. Sign onto Scoutbook (if you misplace your login credentials, click login then click the Forgot Password link.)

**Log onto Scoutbook** Then click on My Dashboard then go, My Account, and then to your My Positions page. Your merit badge counselor position should display similarly to this:

**Merit Badge Counselor** ✓  
Troop 14  
Jul 26, 2014

- Citizenship in the Community
- Citizenship in the Nation
- Citizenship in the World
- Digital Technology
- Family Life
- Personal Management
- Programming

Approved by the Grand Canyon Council  
Counselor for any Scout in the BSA

If it isn't in the My Positions section of your account, you are not showing in Scoutbook as a Merit Badge Counselor contact your council service center.

Scoutbook shows blue check marks next to the badges you are approved by the council to counsel and shows how your visibility settings are set. "Counselor for any Scout in the BSA" in the above example means the counselor is visible to any unit in the BSA. This setting by default is set to counselor for your local council which means you are visible to all units in your local council.

To adjust your settings, click on the Merit Badge Counselor position. You will see a screen similar to the following:



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The screenshot shows a settings interface with the following sections:

- Default Position:** A toggle switch is currently turned off.
- Availability:** Two radio buttons are present: "Available" (selected) and "Busy".
- Listing Preference:** Five radio buttons are present: "Any Council (Worldwide)" (selected), "Council List", "District List", "Unit List", and "Not Listed".
- Merit Badges:** A checkbox labeled "Cit. in Comm." is checked. Below it, there is a partially visible section for "Merit Badge Counselor" with a dropdown menu.

You can set your merit badge counselor as your default (primary in Scoutbook) position.

The other settings as follows:

#### Availability

- Available – Available to counsel Scouts
- Busy – To busy right now to counsel any more Scouts

#### Listing Preference

- Any Council (Worldwide) – My name shows up in lists accessible throughout the BSA
- Council List – Restrict my listing to my local council
- District List – Restrict my listing to my local district
- Unit List – Restrict my listing to my unit (you can list multiple units here)
- Not Listed – **Don't list me at all on any lists. (this does not remove your merit badge counselor registration. If you wish to be removed from the position, contact your council service center.)**

Now that you are setup in Scoutbook, unit leaders or parents can assign you to their Scouts. (see #2 below)

#### UNIT LEADER INSTRUCTIONS

**NOTE: Once a council uploads the council merit badge counselor list to Scoutbook, troops will no longer be able to add a Merit Badge Counselor to their troop roster. However troops will still be able to invite Merit Badge Counselors to work with their Scouts from the Merit Badge Counselor List in Scoutbook.**

If you are a unit admin and want to add all the counselors registered with your unit.

To find a registered merit badge counselor, go to your Troop page and towards the bottom of the page, select Merit Badge Counselor List (you have to be a unit leader to see this option.)

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You will receive a search page where you can search for merit badge counselors by badge and by how far out you wish to search. The merit badge counselors will be listed with the closest counselors first to the farthest away.

HINT: When you find the merit badge counselors you are looking for write the name down. You will need it later.

Go into your roster and click on the Add Leader button. Be sure to use the global search tool to search for the counselor because they already have an account in Scoutbook created by the local council.

Select the Merit Badge Counselor position then set the permissions to None. You will be able to define the badges they will be associated with your Scout to teach after you have set them up in the roster.

**Scout Connections**

Define the level of access this leader should have with each Scout account. If you are setting this user up as a Troop Admin, they must be setup with full control permissions over the entire troop. Patrol Admins need full control permissions over their assigned patrol(s). Set permission to **None** if you want to manually setup permissions later.

Permissions:

Same for all Scouts

Custom

Permission: None >

**Personal Message (optional)**

Personal Message: ?

Hey John. I'm inviting you to Scoutbook so you can start approving merit badge requirements for the boys in the ward. Please follow the instructions in the email.

Submit Cancel

Merit Badge Counselors do not need Edit Advancement permission to the Scouts they teach. Scoutbook automatically gives them permission to edit just those badges you have defined in the Scout's Connections page.

Now that the counselors are in your roster you can proceed to assign them to your Scouts.

After the unit leader has discussed a merit badge with the Scout, the leader will suggest at least one counselor to work with to complete the badge. Once decided you can assign a counselor to each badge the Scout has started by going into the Scout's Connection page and add a connection to the counselor.



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Here is a sample connection page showing a counselor that is assigned to a Scout. Notice the Unit Leader is also a MBC to the Scout. You can also assign other counselors who are not local to your unit as connections (summer camps, universities). Scoutbook is completely flexible.

**Shawn Jackson**  
Adult Leader, Assistant Scoutmaster, Merit Badge Counselor, Scoutmaster

- Full Control
- Approve Art MB
- Approve Sustainability MB

**Will Smith**  
Merit Badge Counselor

- View Profile
- Approve Amer. Cultures MB
- Approve Mining in Society MB

If the counselor already exists in your unit:

Go to the Scout's Connections page. See if the counselor already exists as a connection.

If you already see the counselor listed as a connection you may need to edit the connection and check the box to configure them as a merit badge counselor. This will give you additional options to define which of the Scout's badges they will be assigned.

Remember each connection can have multiple roles so check all the boxes that apply.



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**Modify Connected Adult**

**Will Smith**  
c1@scoutbook.com

Relationship to Brian: (?) (check all that apply)

- Parent/Guardian
- Other Family Member
- Scoutmaster
- Assistant Scoutmaster
- Merit Badge Counselor
- Other Leader

**Permissions**

Full Control (?)  OFF

Edit Advancement (?)  OFF

View Advancement (?)  ON

Edit Profile (?)  OFF

View Profile (?)  ON

Approve Merit Badges (?)

- Amer. Cultures
- Mining in Society

If the counselor is not listed as a connection to the Scout you can click on the Add button.

Use the search box to **find the counselor's** Scoutbook account. Fill out the form and Scoutbook will send an email invitation to them to be connected to the Scout.

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Make sure all the counselors have current Youth Protection Training (YPT) or else they will not show up in the Merit Badge Counselor List.

Q. Can my unit import merit badge counselors?

A. No. Merit badge counselors are BSA positions which require approval by the local service center. Scoutbook does not support importing merit badge counselors via unit imports.