



4HOnline Users Guide



For County Managers

February 6, 2015



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Introduction

4HOnline is an online member enrollment and event management software owned by RegistrationMax LLC., and used in ___ states across the United States. _____ 4-H introduced 4HOnline member and adult volunteer enrollment in _____. Since that time, the State 4-H Office has introduced Event Registration and Animals/Livestock and has opened the program to 4-H members, families and club leaders.

4HOnline is highly customizable for each state and thus is always improving. Please use the following manual as a guide to using 4HOnline in _____. Subsequent editions will include updated information as new portions of the program are developed and released.

4HOnline Structure

In order to understand how the program works, it is necessary to understand the structure upon which it is built. 4HOnline is built on a hierarchical structure. Each level has access to the information in the levels below it. The structure is as follows:

- State Administrator Account (program set-up)
↓
- State Account
↓
- County Account
↓
- Club Account (some counties may not use this level)
↓
- Family Account
↓
- Member Profile (must log in to a family account to access the member profile)

The 4HOnline Users Guide focuses on how to use the program at the District, County, Club and Family levels.

4HOnline Infrastructure and Security Measures

Hardware:

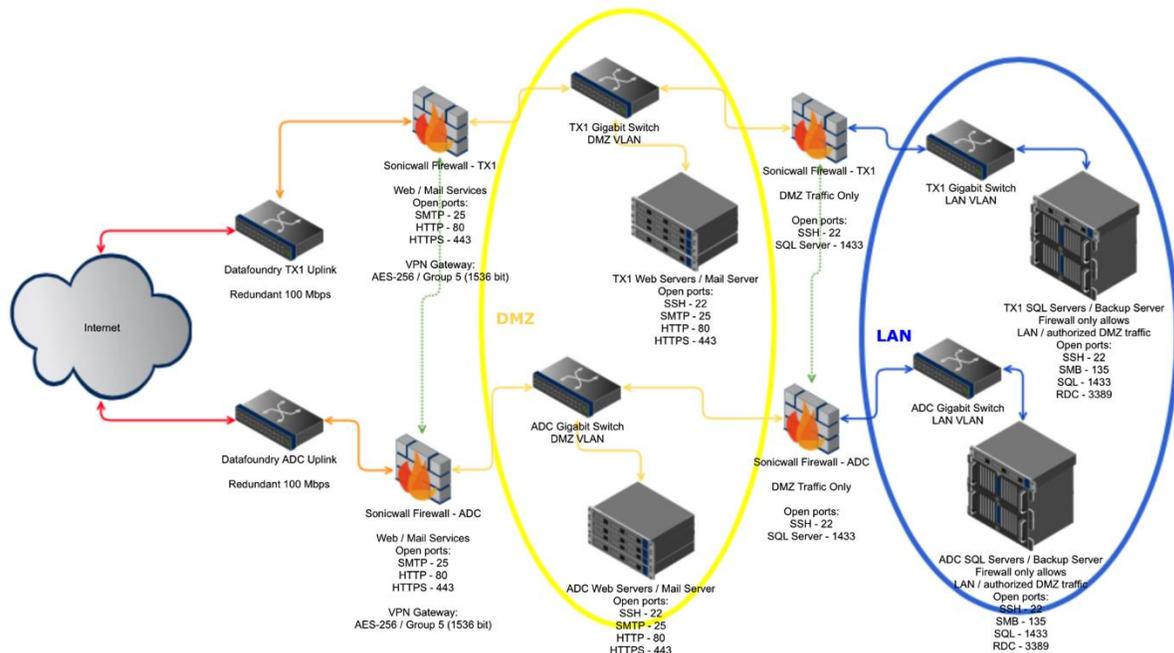
Texas 1 Datacenter

- 2 – Sonicwall firewalls in failover configuration
- 1 – DELL Powerconnect 6248 gigabit switch - primary
- 1 – DELL Powerconnect 5524 gigabit switch - secondary
- 1 – DELL R820 32-core SQL Server 2008 R2 database server (256 GB RAM)
- 1 – DELL R720xd 6-core SQL Server 2008 R2 file server (9TB – Expandable to 18TB)
- 1 – DELL R420 12-core IIS 8 web server
- 1 – DELL R320 6-core IIS 8 web server
- 1 - Buffalo Terastation backup server

ADC Datacenter

- 2 - Sonicwall firewalls in failover configuration
- 1 – DELL Powerconnect 6248 gigabit switch - primary
- 1 – DELL Powerconnect 5524 gigabit switch - secondary
- 1 – DELL R720xd 16-core SQL Server 2008 R2 database server (64 GB RAM)
- 1 – DELL R720xd 6-core SQL Server 2008 R2 file server (8TB – Expandable to 16TB)
- 1 – DELL R420 12-core IIS 8 web server
- 1 – DELL R320 6-core IIS 8 web server
- 1 - Buffalo Terastation backup server

Logical Network Map:



This is a logical representation of the traffic flow of the network. A physical wiring diagram would look different.

High Availability:

By utilizing two datacenters we are able to reliably plan for an emergency datacenter fail-over if need be. The configuration includes a dedicated secure fiber interlink between our cabinets at each datacenter. This fiber connection allows us to take advantage of the hardware in both datacenters simultaneously. In case of a lost connectivity at one datacenter, all Internet traffic will redirect to the available datacenter and connect to the unavailable datacenter's servers via our dedicated fiber connection. In the case that all connectivity is lost at one datacenter (including the fiber connection) the secondary datacenter has the capacity to take over the network load. All database data is replicated to both datacenters.

Firewall Security:

All traffic flowing through the firewall is subjected to a full packet inspection; this allows us to run IPS (Intrusion Prevention), IDS (Intrusion Detection) and anti-virus/anti-bot scanners on all requests. In addition, only traffic generating from the US or Canada is even allowed to get to point of packet inspection, all other traffic is dropped immediately.

VPN Security:

We use a VPN tunnel to connect to our servers for maintenance and development. VPN stands for "Virtual Private Network", it creates a virtual encryption tunnel through which all traffic flows. This completely blinds anyone not authenticated from seeing the information that is inside the VPN tunnel. We use AES-256 encryption, which is currently the most secure encryption method available. It is said that it would require several billion years with modern computing hardware to crack an AES-256 cypher.

Website Security:

All web traffic to and from our web servers runs through SSL encryption. This encrypts all data and prevents anyone other than the users' browser and our web servers from knowing the information that is being requested and sent.

Webserver Security:

We maintain the web servers with the latest security patches and updates. We also run anti-virus software on the webservers themselves in addition to the anti-virus on the firewall as an extra measure. All webservers run their own local firewalls that only allow necessary traffic in. Only two users are allowed to login (via VPN) to the servers themselves, narrowing the possibility of a brute force password attack.

Database Server Security:

We maintain the database servers with the latest security patches and updates. While public internet traffic should never touch the database servers, we run anti-virus software on the database servers as an extra measure. All database servers run their own local firewalls that only allow necessary traffic in. Only two users are allowed to login (via VPN) to the servers themselves, narrowing the possibility of a brute force password attack.

Database Security:

Access to the databases is only allowed from authenticated users who are coming to the server through the VPN tunnel. Each developer maintains their own username and password and the applications also have separate logins to the database. We use fine-grained permissions and do not allow developers access to the data that they don't need. We maintain logs of all logins.

Data Security:

All sensitive data is encrypted in the database using an AES-256 encryption algorithm. All passwords are "one-way hashed", meaning the hash itself cannot be decrypted to show a password. This is why we have to reset passwords and we cannot tell you what the existing password is. The database logs are backed up every 20 minutes throughout the day with full backups being performed every night. We currently maintain 20 minutes steps of backups going back 2 weeks, full backups for 6 months. In addition to the database server and backup server, the data is also archived to a disaster proof external drive.

Physical Security:

Our servers are located at Data Foundry datacenters in Austin, Texas. Access to the cabinet requires passing through 4 stages of biometric authentication in addition to a personal ID check in order to get the key to the cabinet itself. More information is available at <http://www.datafoundry.com/data-centers/>

4HOnline takes the security of your data very seriously. We understand the sensitivity of the data that we manage and do everything we can insure that the information is kept safe for your peace of mind as well as ours.

County Manager Account Introduction and Overview

When the State 4-H Office sets up a county manager account, the county manager receives an email message with a temporary password.

Go to ne.4honline.com to log in. Select “I have a profile.” Enter the email address and the temporary password. Select “County” as the Role and click “Login.”

The login form includes three radio button options: "I have a profile" (selected), "I need to setup a profile", and "I forgot my password". Below these are input fields for "Email:" (highlighted in yellow), "Password:" (masked with dots), and a "Role:" dropdown menu set to "County". A "Login" button is located at the bottom of the form.

The Home page in a county account shows a brief snapshot of recent activity in the program. This includes notifications of any members who have recently moved to the county, links to state and county newsletters, pending enrollments and registrations, payments due and an enrollment snapshot. To return to the home page at any time, click “Home” at the top right of the page.

The screenshot shows the home page of the County Manager Account. At the top right, there is a "Home" link circled in red. The page features a navigation bar with tabs for Enrollment, Events, Animals, Connect, Finances, and Data. Below the navigation bar is a dashboard with various sections: "New Messages", "New State Forum Topics", "Queued Reports" (with a table of reports), "Queued Bulk Downloads", "Announcements & Newsletters", "Items to Review", "Items to Order / Pay", and a "2012-2013 Enrollment Snapshot" table.

| Queued Reports | Type | Status | Start Time | End Time |
|----------------------------|-------|-----------|------------|----------|
| (10 KB) | Excel | Completed | 10:21 AM | 10:21 AM |
| Project - Enrolled (71 KB) | PDF | Completed | 09:57 AM | 09:57 AM |

| 2012-2013 Enrollment Snapshot | Count |
|-------------------------------|-------|
| Youth Club Enrollment | 0 |
| Adult Volunteer Enrollment | 0 |
| Youth Volunteer Enrollment | 0 |
| Group Youth Enrollment | 0 |

The county account contains six navigation tabs (as of the User Guide publication date). Tabs include: Enrollment, Events, Animals, Connect, Finances and Data. More tabs, including Statistics and Training are available, but are not yet in use in _____ and thus do not appear in user accounts.

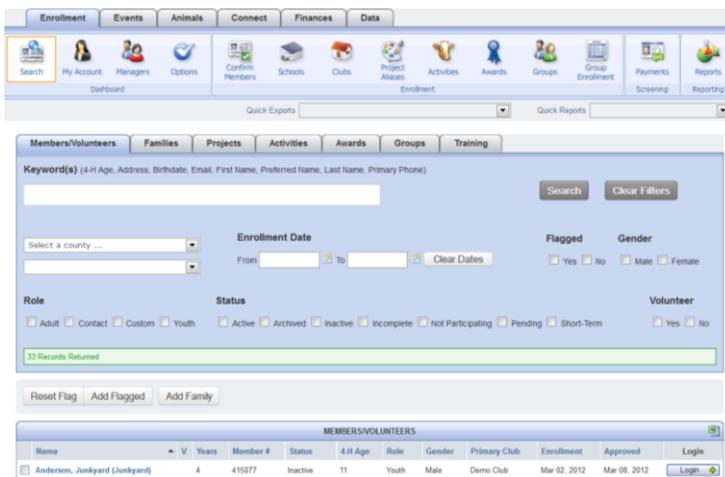
This screenshot shows the navigation tabs at the top of the County Manager Account interface. The tabs are: Enrollment, Events, Animals, Connect, Finances, and Data. Below the tabs is a row of icons for various functions: Search, My Account, Managers, Options, Confirm Members, Schools, Clubs, Project Aliases, Activities, Awards, Groups, Group Enrollment, Payments, and Reports.

The Enrollment tab contains information pertaining to the county account and all member enrollment information. Icons under the Enrollment tab include: Search, My Account, Managers, Options, Confirm Members, Schools, Clubs, Project Aliases, Activities, Awards, Groups, Group Enrollment, Payments and Reports.

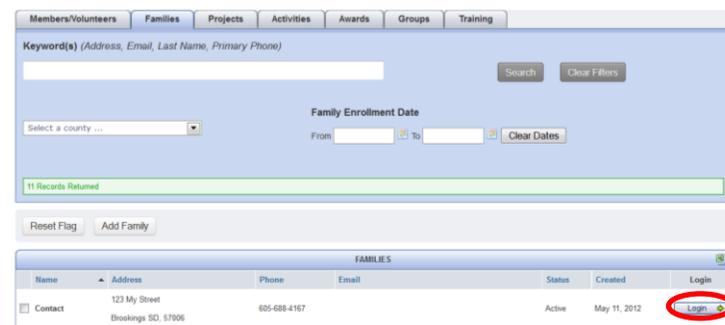
The screenshot shows the Enrollment tab interface. It features a search bar with "Quick Experts" and "Quick Reports" dropdowns. Below the search bar are tabs for "Members/Volunteers", "Families", "Projects", "Activities", "Awards", "Groups", and "Training". The main content area includes a "Keyword(s)" search field, a "Search" button, and a "Clear Filters" button. There are also filters for "Enrollment Date" (From and To) and "Flagged" (Yes/No) and "Gender" (Male/Female).

The Search icon under the Enrollment tab returns a second set of tabs.

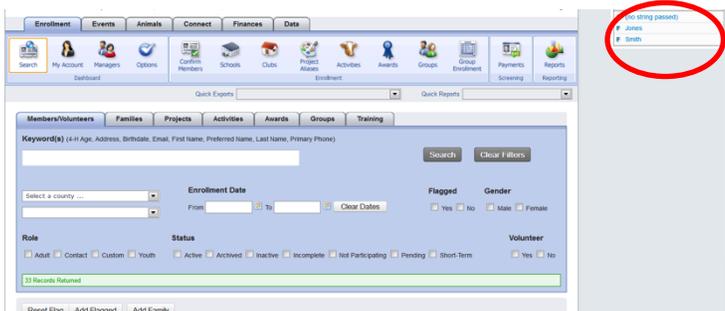
The Members/Volunteers tab is a searchable list of all members/volunteers in the county. Click “Login” to access the family view of the member/volunteer account.



The Families tab is a searchable list of all Family accounts in the county. Click “Login” to access the family view of the account.



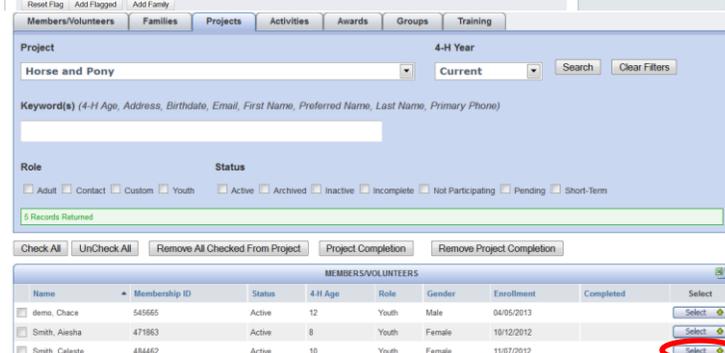
As the county manger logs in and out of member accounts, the system updates the “Recent Profiles” pane with direct links to recently-visited profiles.



Click the “Projects” tab to execute a search of who is enrolled in a specific project area.

In order to make note of project completion for the current 4-H year, mark the check box next to the member name and click “Project Completion.”

Select a member to manage the member’s project list.



The county manager may add or delete projects or update the years in projects from this page.

Click the “Activities” tab to view a list of members enrolled in specific activities, to add members to activities or to remove members from activities.

Click the “Awards” tab to view a list of members who have received specific awards, to add members to awards, or to remove members from awards.

Click the “Groups” tab to view members enrolled in various state or county groups, to add members to groups or to remove members from groups.

| Name | Membership ID | Status | 4-H Age | Role | Gender | Enrollment | 4-H Year | Group | Select |
|------------------------|---------------|--------|---------|-------|--------|------------|-----------|-----------------|--------|
| Anderson, Tazz (Testy) | 415042 | Active | 6 | Youth | Male | 10/12/2012 | 2012-2013 | Special Program | Select |
| demo, Chace | 545665 | Active | 12 | Youth | Male | 04/05/2013 | 2012-2013 | Special Program | Select |
| Smith, Aiesha | 471863 | Active | 8 | Youth | Female | 10/12/2012 | 2012-2013 | Special Program | Select |

NOTE: At this time, _____ does not utilize the “Training” tab.

Return to the top Enrollment tab.

To update county account information, click “My Account.” Be sure to click “Save” after making any changes.

Profile Information

Email: celeste.smith@sdstate.edu | joe@gmail.com

First Name: Celeste

Last Name: Smith

Organization Title: admin

Mailing Address: sqg 109

City: Brookings

State: South Dakota

Zip Code: 57067 | 12345

Primary Phone: 605-688-4167 | 555-555-1234

4-H County: Demo

County Information

Fac: _____

Web Site: _____

Newsletter Site: _____

Location: _____

Password Management

Current Password: ●●●●●●

New Password: _____

Confirm New Password: _____

Update Password

Save Cancel

Click the “Managers” icon to add additional county managers.

MANAGER LIST

| Unit | Title | Name | Edit |
|------|-------|------|------|
|------|-------|------|------|

Click the “Options” icon to set County options. See [How to Set County Options](#) for further explanation.

Options

Hide Projects

Hide State Groups

Project Leaders

Click “Confirm Members” to view and confirm pending member enrollments. See [How to Confirm a Member Enrollment](#) for more information.

MEMBERS/VOLUNTEERS NEEDING COUNTY APPROVAL

| Name | 4-H Age | Type | Gender | Primary Club Title | Club Status | Enrollment Status | Enrollment Date | Login |
|------------|---------|-------|--------|--------------------|-------------|-------------------|-----------------|-------|
| Smith, Sam | 17 | Youth | Male | Demo Club | Pending | Pending | May 06, 2013 | Login |

MEMBERS/VOLUNTEERS AWAITING FORM APPROVAL

| Name | 4-H Age | Type | Gender | Primary Club Title | Club Status | Enrollment Date |
|-----------------|---------|-------|--------|--------------------|-------------|-----------------|
| smiths, Celeste | 19 | Adult | Female | Demo Club | | Mar 08, 2012 |

Click “Schools” to add additional schools. See [How to Add a School](#) for more information.

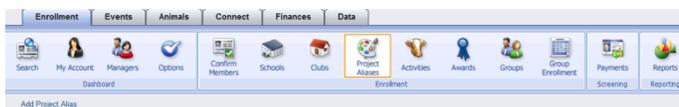
SCHOOLS

Click “Clubs” to manage clubs. See [How to Update Club Information](#) for further explanation.

CLUBS

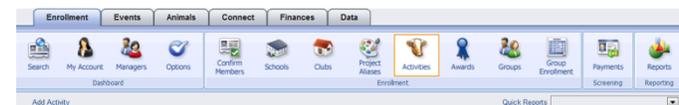
| Title | Status | Delivery Mode | Login | Edit |
|------------|--------|------------------------------|-------|------|
| Demo Club | Active | Organized 4-H Community Club | Login | Edit |
| Lucky Kids | Active | Organized 4-H Community Club | Login | Edit |

Click “Project Aliases” to manage the county project alias list. See [How to Set Up Project Aliases](#) for more instructions.



| PROJECT ALIASES | | Edit |
|-----------------|-------|----------------------|
| Project | Alias | |
| Cloverbuds | Cat | Edit |

Click “Activities” to manage the activity list. See [How to Add an Activity](#) for more information.



| ACTIVITIES | | | | Edit |
|------------|------|-----------------|-------------|----------------------|
| Level | Unit | Activity Title | Description | |
| County | Demo | Farm Safety Day | | Edit |

Click “Awards” to manage the awards list. See [How to Add an Award](#) for more information.



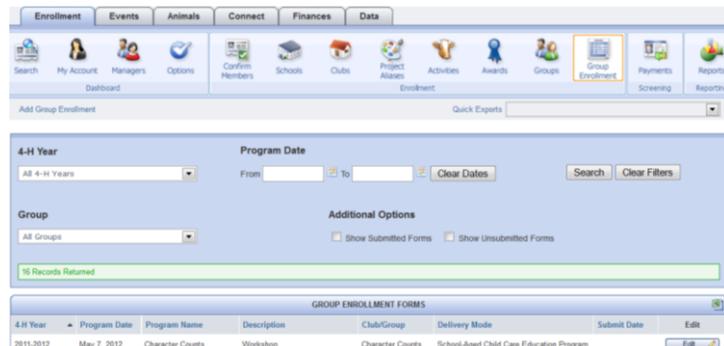
| AWARDS | | | | Edit |
|--------|------|------------------------------|-------------|----------------------|
| Level | Unit | Award Title | Description | |
| County | Demo | Demo County Leadership Award | | Edit |

Click “Groups” to manage the groups list. See [How to Add a Group](#) for more information.



| GROUPS | | | | Edit |
|--------|------------|-------|---|----------------------|
| Level | Group Type | Title | Description | |
| County | Camp | Test | 4-H Special Interest / Short-Term Program | Edit |

Click “Group Enrollment” to add a new Group Enrollment or update an existing Group Enrollment. See [How to Enter a Group Enrollment](#) for more information.



| GROUP ENROLLMENT FORMS | | | | | | | Edit |
|------------------------|--------------|------------------|-------------|------------------|--|-------------|----------------------|
| 4-H Year | Program Date | Program Name | Description | Club/Group | Delivery Mode | Submit Date | |
| 2011-2012 | May 7, 2012 | Character Courts | Workshop | Character Courts | School-Aged Child Care Education Program | | Edit |

Click “Payments” to track screening payments. More training on this feature will come soon.

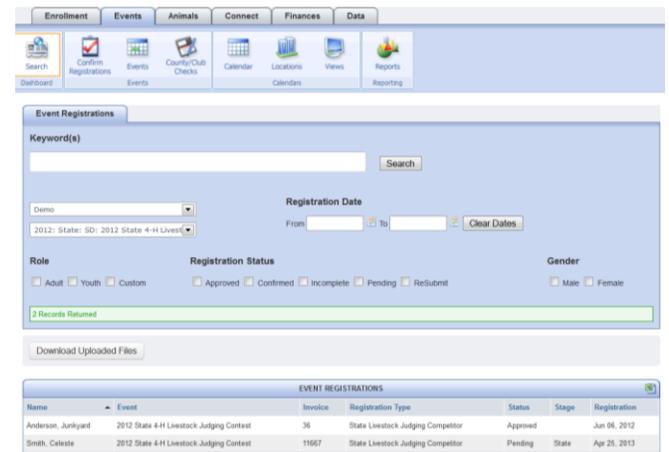


| VOLUNTEER SCREENING PAYMENT LIST | | | | | | | | |
|----------------------------------|------------------|-------------|--------|---------|----------|--------------|------------------|----------------------|
| id | Transaction Date | Bill Number | Amount | Balance | Method | Check Number | Payment Received | Edit |
| 1 | Mar 07, 2012 | 1 | 0.00 | 0.00 | 4H Check | 123 | Yes | Edit |

Click “Reports” to access Enrollment Reports. View the [Reports for Managers](#) section for more information about how to create and run reports.



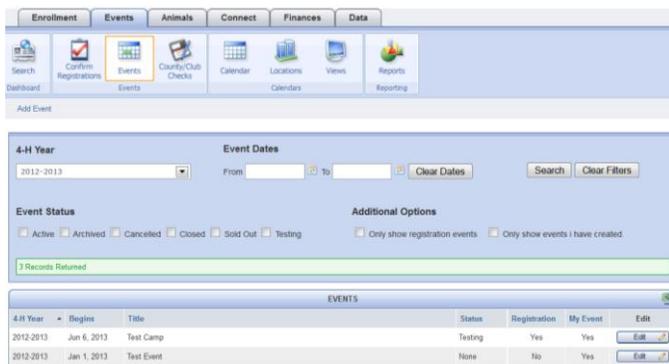
The Events tab contains eight icons related to event management. The “Search” icon allows the user to search member event registrations.



Click “Confirm Registrations” to confirm event registrations. See [How to Confirm Event Registrations](#) for more information.



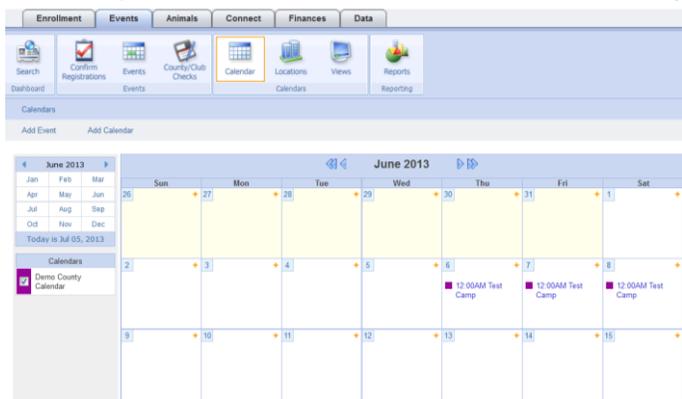
Click the “Events” icon to manage existing events or to add new events. See [How to Set Up a County Event with Registration](#) for detailed instructions regarding how to add a new event.



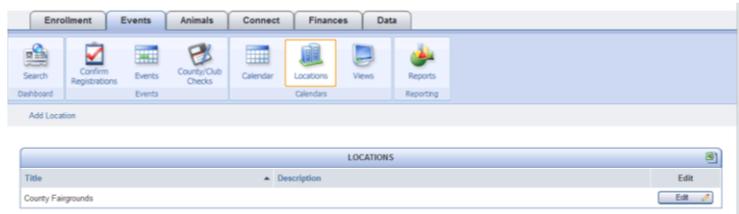
At this time _____ does not use the County/Club Checks feature extensively. More training will follow.



Click “Calendar” to manage County event calendars. See [How to Set Up a County Event with Registration](#) (steps 1 – 6) for more details. More training on Calendars will follow at a later time.



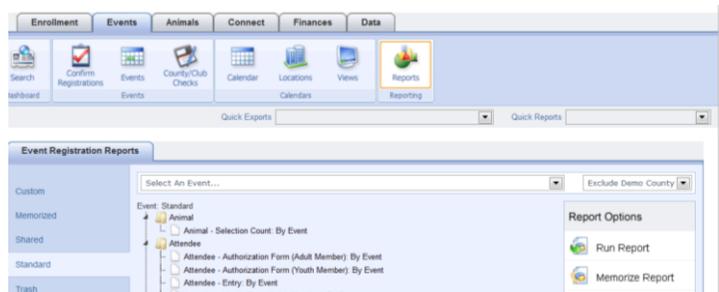
Click “Locations” to add and manage event locations.



Click “Views” to manage calendar views. More training will follow at a later time.



Click “Reports” to create and run reports for Events.



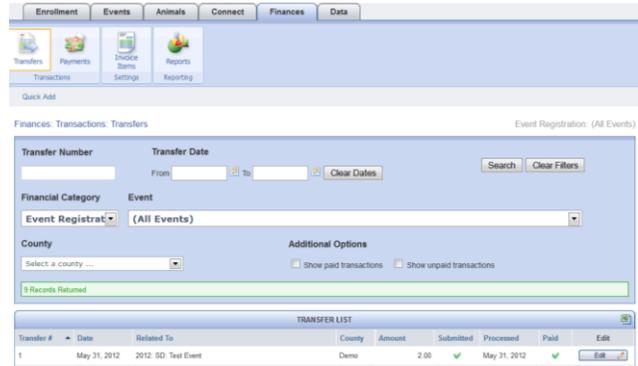
Click the “Animals” tab to view members who have specific types of animals or to add or remove animals in member accounts. See [How to Add Animals - County](#) for further instructions.



Communication options within 4HOnline are found under the “Connect” tab. At this point, _____ only utilizes the “Newsletters” function. See [How to Upload Newsletters and Announcements](#) for more information.



Due to _____ University regulations, at this point _____ only utilizes the “Transfers” icon under the Finance tab. For further instructions see [How to Submit a County Transfer](#).



Use the Data tab to identify any potential Enrollment or Event issues or to change a Member’s Role or Club. See [How to Switch a Member’s Club with Projects](#) for more information.



How to Add a New Family and Youth Member – County

1. Click on the “Enrollment” tab.
2. To add a youth member to an existing family, login to the family account and continue from step 13.
3. To add new family, click “Add Family.”

4. Enter the Family Information.
5. The Family Email and Family Phone are not required, but are highly recommended.
6. Click “Add Family.”

7. Verify that the family is not already in the system. Check “Confirm Add New Family.”
8. Click “Add Family.”

9. Enter the Profile Information.
10. Click “Continue.”

- Select the type of member to add.
Youth: Traditional full-year 4-H youth member
Youth (Short-Term Member): Youth who do not participate in a traditional 4-H club, but may participate in a group for a portion of the year such as Shooting Sports. These youth are not counted on the ES237 unless included in a Group Enrollment.

- Enter the member's Personal Information.
- Information in **Bold** is required. All other information is optional.
- Click "Continue" to save changes and advance to the Additional Information page.

- Using the member's paper form, enter that the document was received, when it was received, and if consent was given for each section. Keep the paper form on file at the County 4-H Office.
- Click "Continue."

- Enter the member's health information and click "Continue."
- If a Health Form does not appear, return to the Personal Information page and check the youth's birthdate. The Health Form will only appear for members ages 5 - 18 as of January 1 of the current program year. A missing Health Form signifies an entry error in the birthdate.
- Click "Continue."

20. In order to enroll in _____ 4-H, a member must enroll in at least one Club.
 - Independent members should enroll in the County’s “Independent” Club.
 - Cloverbuds may enroll in a local 4-H Club, but must also enroll in the Cloverbuds Group found under the Groups tab.
21. Select the desired Club.
22. Click “Add Club.”
23. The Club appears in the “Club List.”
24. If the member chooses to enroll in more than one club, be sure to select which Club is considered the Primary Club.
25. Click “Continue.”

26. In order to enroll in _____ 4-H, each the youth member must select at least one project.
 - Cloverbuds may only enroll in the “Cloverbuds” project.
27. Click “Add Project.”
28. Click “Continue.”
29. Groups are optional. Add any desired groups.
- Cloverbuds should enroll in the Cloverbuds group.
30. Click “Submit Enrollment.”

31. Review the member's information to be sure it is complete and correct.
32. Click "Accept Member."

Logged in as Smith: Charity [Return to the County account] Home | My Member List

Animals / Livestock **Enrollment**

Personal Information
Additional Information
Health Form
Participation
County Review

Profile Information

Charity Smith - Youth record created: 04/30/2013

Family Name: Smith
 Membership Status: Pending
 Family Email: ces@ces.net
 Family Address: 1523
 Family City: Brookings
 Family State: South Dakota
 Family Zip Code: 57006

33. The new member now appears on the "Member List."

Member List

Please review the list below to see the members/adult volunteers associated with your family record. Click "Edit" to re-enroll for the current year or to change information on the individual record.

Do not add a record for a member who is already listed.
Also, do not add an individual record for an adult (parent) who is NOT a volunteer/leader.

If your enrollment status is "Inactive" or "Incomplete," click the "Edit" button to review and submit your record for approval.

If your enrollment status is "Pending," your record is complete and waiting for county office approval.

How to Add Animals to Member Accounts

Smith Family [Edit Family](#)

1523
Brookings, SD 57006

Address is Not Verified

605-688-4167
ces@ces.net [send mail]
Admin County [contact info]

Add A New Family Member

select a member type...

ReActivate An Archived Family Member

select a member...

YOU CAN NOT REGISTER FOR AN EVENT UNTIL YOUR ENROLLMENT HAS BEEN ACCEPTED AND YOUR STATUS IS SET TO ACTIVE
 If your enrollment status is "inactive" or "incomplete", click the "Edit" button to review and submit your record for approval.

| Member/Volunteer List | | | | | | |
|-----------------------|---------------|-------|---------------|-------------------|------------------|-------------------------------------|
| | Name | Role | Membership ID | Enrollment Status | Last Active Year | Edit |
| 1) | Charity Smith | Youth | 542773 | Active | 2012-2013 | <input type="button" value="Edit"/> |

34. To enroll another family member, select the member type and repeat steps 11 – 33.
35. If the second member's Parent Information is the same as the first member's information, select "Copy parent information from another youth record" to auto-fill these portions of the form.

Copy parent information from another youth record

Celeste Smith

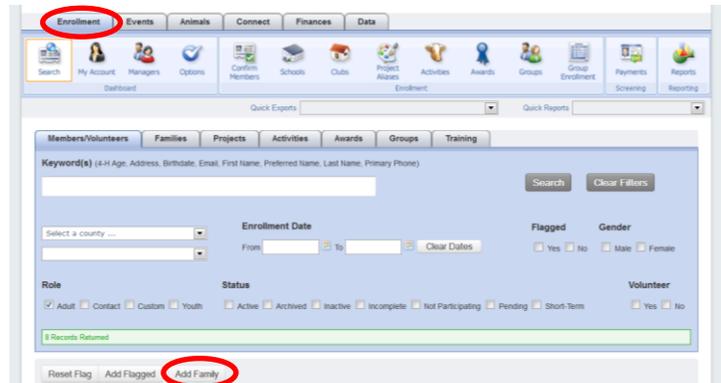
Profile Information

First Name: Celeste
 Last Name: Smith
 Mailing Address: 1234 My Street
 City: Brookings
 State: South Dakota
 Zip Code: 57006
 Birth Date: mm/dd/yyyy
 Gender: Female
 Primary Phone: 605-688-4167
 Correspondence Preference: Mail

Note: The "First Name" field is circled in red in the original image.

How to Add a New Family and Adult – County

1. Log in to the County account.
2. To add a registered adult volunteer to an existing family account, log in to the family account and continue from step 13.
3. Click on the “Enrollment” tab.
4. Click “Add Family.”



5. Enter the Family Information.
6. The Family Email and Family Phone are not required, but are highly recommended.
7. Click “Add Family.”

8. Verify this is not a duplicate family account. Check “Confirm Add New Family”
9. Click “Add Family.”

10. Enter the Profile Information.
11. Click “Continue.”

12. Select the type of member to add.
Adult: Registered Adult Volunteer
Contact: Any other adult who may be affiliated with 4-H but is NOT a registered volunteer (examples: committee/board members, sponsors, judges).

13. Click “Add Member.”

14. Enter the member’s Personal Information.
15. Information in **Bold** is required. All other information is optional.
16. Be sure to mark “Yes” for “Are you a volunteer?”
17. Click “Continue.”

18. Using the member’s paper form, enter that the document was received, when it was received, and if consent was given for each section.

NOTE: Each of the agreements is on the Volunteer Work Agreement (aka. Volunteer Enrollment Form), but is in a different order than is listed on the Additional Information page. If the volunteer has signed the Volunteer Work Agreement, he or she has agreed to each of the agreements listed.

19. Click “Continue.”

20. Complete the Volunteer Screening form.
21. If a Volunteer Screening form does not appear, return to the Personal Information page and check the “Are you a Volunteer?” field.
22. Click “Continue.”

23. If the volunteer is a Club leader or volunteers for a particular Club, select the Club and Volunteer Type.
24. Click "Add Club."
25. Click "Continue."
26. If the Volunteer is not involved in specific projects, activities or groups, click "Submit Enrollment."

27. If the Volunteer helps with a particular project area, select the project and volunteer type.
28. Click "Add Project."
29. Click "Continue."
30. If the Volunteer is not involved in specific activities or groups, click "Submit Enrollment."

31. If the Volunteer is involved with a specific Activity, select the activity and volunteer type.
32. Click "Add Activity."
33. Click "Continue."
34. If the Volunteer does not participate in a specific Group, click "Submit Enrollment."

35. Click the "Groups" tab.
36. If the Volunteer is part of a specific Group, select the group and volunteer type.
37. Click "Add Group"
38. Click "Submit Enrollment"

39. The Adult will appear on the Member List as "Pending."
40. Send the paper Volunteer Work Agreement with the cost recovery fee to the State 4-H Office.
41. The State 4-H Office will forward the form to Human Resources who will contact HireRight to run a background check.
42. After the State 4-H Office receives notification of a cleared background check, the State will approve the volunteer.

| Name | Role | Membership ID | Enrollment Status | Last Active Year | Edit |
|------------------|-------|---------------|-------------------|------------------|----------------------|
| 1) Charity Smith | Youth | 542773 | Active | 2012-2013 | Edit |
| 2) Jack Smith | Adult | | Pending | | Edit |

Volunteer Screening Pending (2012-2013): [View](#)

43. After the State 4-H Office approves the volunteer, the County needs to give final approval.
44. Click the "Enrollment" tab.
45. Click "Confirm Members"
46. Click "Login" next to the member.

| Name | 4-H Age | Type | Gender | Primary Club Title | Club Status | Enrollment Status | Enrollment Date | Login |
|-------------|---------|-------|--------|--------------------|-------------|-------------------|-----------------|-----------------------|
| demo, Chace | 12 | Youth | Male | Demo Club | Confirmed | Pending | Apr 05, 2013 | Login |
| Smith, Jack | 25 | Adult | Male | Demo Club | Pending | Pending | May 01, 2013 | Login |

47. Click on the "County Review" page.
48. Review the volunteer's information.
49. If everything is correct and complete, click "Accept Member" at the bottom of the page.

Profile Information

Jack Smith - Adult record created: 05/01/2013

Family Name: Smith
 Membership Status: Pending
 Family Email: ces@ces.net
 Family Address: 1523
 Family City: Brookings

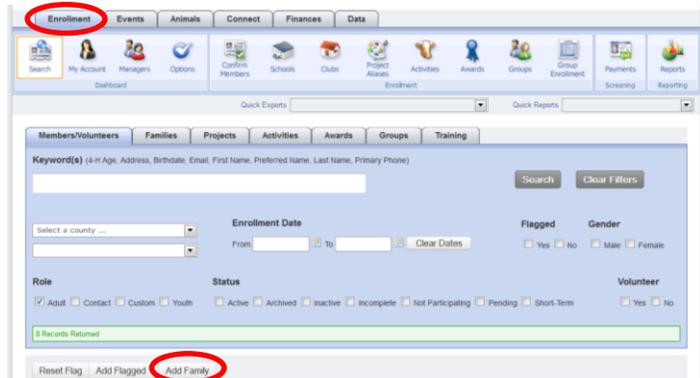
50. The Volunteer enrollment status is now "Active."
51. If the background check results return any restrictions, the restrictions are noted next to the form on the Member List.

| Name | Role | Membership ID | Enrollment Status | Last Active Year | Edit |
|------------------|-------|---------------|-------------------|------------------|----------------------|
| 1) Charity Smith | Youth | 542773 | Active | 2012-2013 | Edit |
| 2) Jack Smith | Adult | 542978 | Active | 2012-2013 | Edit |

Volunteer Screening Approved (2012-2013): [View](#) **No Restrictions**

How to Add a New Family and Contact – County

1. Log in to a County account.
2. Click on the “Enrollment” tab.
3. If the Contact’s family is not already in 4HOnline, click “Add Family.” If this is an additional family member in an existing family, log in to the family account and skip to step 12.



4. Enter the Family Information.
5. The Family Email and Family Phone are not required, but are highly recommended.
6. Click “Add Family.”



7. Verify that the family is not already in the system. Check “Confirm Add New Family”
8. Click “Add Family.”



9. Enter the Profile Information.
10. Click “Continue.”



11. Select “Contact” as the member type.
12. Click “Add Member.”



13. Enter the Contact's Personal Information.
14. Information in **Bold** is required. All other information is optional.
15. Click "Continue."

Contact Personal Information

Profile Information

First Name: Susan

Last Name: Smith

Mailing Address: 12315

City: Brookings

State: South Dakota

Zip Code: 57006

16. If the Contact participates in a group, select the group and click "Add Group."
17. Click "Continue."
18. The Contact appears on the Member List for the family.

Groups

ATTENTION CLOVERBUDS!
Please enroll in the 'Cloverbuds' Group below.

Add a Group

Select a Group: **Special Program (Group)**

Performing Arts Troupe (Camp)

Test (Camp)

TLC (Camp)

Babysitting Training (Group)

Character Counts (Group)

Cloverbuds (Group)

Demo Camp (Group)

Special Program (Group)

<< Previous Return to Member List Continue >>

How to Add an Activity

1. Click on the "Enrollment" tab.
2. Click on the "Activities" icon.
3. Click "Add Activity."
4. Enter the Activity Information.
5. If the Activity is Project-Related, select the Project Related check box.
6. Click "Save."



Activity Information

Activity Title:

Description:

Unit:

Code:

Project Related:

Save **Cancel**

7. The Activity will appear on the Activities list.
8. Activities do not report to the ES237, but do appear on the Member Enrollment History.

| Level | Unit | Activity Title | Description | Edit |
|--------|------|-----------------------|-------------|----------------------|
| County | Demo | Farm Safety Day | | Edit |
| County | Demo | Horse Safety Training | | Edit |
| County | Demo | Judging School | | Edit |
| State | SD | Horse | | Edit |
| State | SD | TEST | | Edit |

How to Add an Award

1. Click on the "Enrollment" tab.
2. Click on the "Awards" icon.
3. Click "Add Award."
4. Enter the Award Information.
5. Click "Save."



Award Information

Award Title:

Description:

Unit:

Save **Cancel**

6. The Award will appear on the Awards list.

| Level | Unit | Award Title | Description | Edit |
|--------|------|------------------------------|-------------|----------------------|
| County | Demo | Demo County Leadership Award | | Edit |

How to Add a Group

1. Click on the "Enrollment" tab.
2. Click on the "Groups" icon.
3. Click "Add Group."
4. Enter the Group Information.
5. Choose whether to share the group with managers or members.
6. If the "Share this group with Members" box is checked, members will be able to add the group to their own accounts.
7. Click "Save."
8. Groups do not count on the ES237 unless a Group Enrollment is created from the Group. See ["How to Enter a Group Enrollment for an Existing Group."](#)



Group Information

Title: Character Education
 Description:
 Group Type: Group
 Delivery Mode: 4) 4-H School Enrichment Program
 Report Method: Group
 Parent Group: Group: Character Counts

Details

Contact: Celeste Smith
 Address Line 1:
 Address Line 2:
 City:
 State: South Dakota
 Zip Code:
 Meeting Location:
 Meeting Time:
 Notes:

Is this unit/group in a racially mixed community?
 Is this unit/group integrated?

Settings

Share this group with Managers:
 Share this group with Members:

Save Cancel

9. The group will appear on the Groups list.

| Level | Group Type | Title | Delivery Mode | Description | Edit |
|--------|------------|--------------------------------------|---|-------------|------|
| County | Camp | Test | 4-H Special Interest / Short-Term Program | | Edit |
| County | Group | Babysitting Training | 4-H Special Interest / Short-Term Program | | Edit |
| County | Group | Character Counts | School-Aged Child Care Education Program | | Edit |
| County | Group | Character Counts Character Education | 4-H School Enrichment Program | | Edit |

How to Add a School

1. Click on the "Enrollment" tab.
2. Click on the "Schools" icon.
3. Click "Add School."
4. Enter the School Information.
5. Click "Save."
6. The school will appear on the list of schools.



School Information

Title: Demo County School
 Alias:
 Type: Private School
 District:

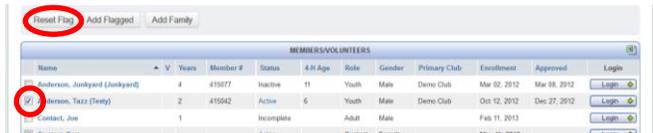
Save Cancel

How to Add Several Members to a Group, Award or Activity at One Time

1. Click on the "Enrollment" tab.
2. To flag members, click on the "Members/Volunteers" tab.



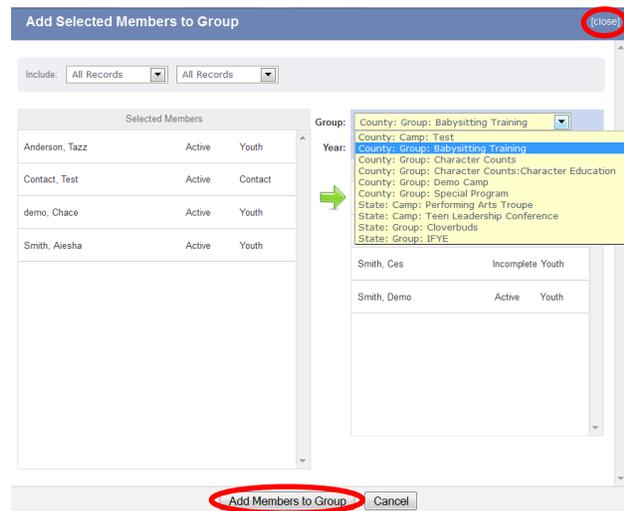
3. Click "Reset Flag" to clear any previously set flags.
4. Flag each member to be added to the Group, Activity or Award.



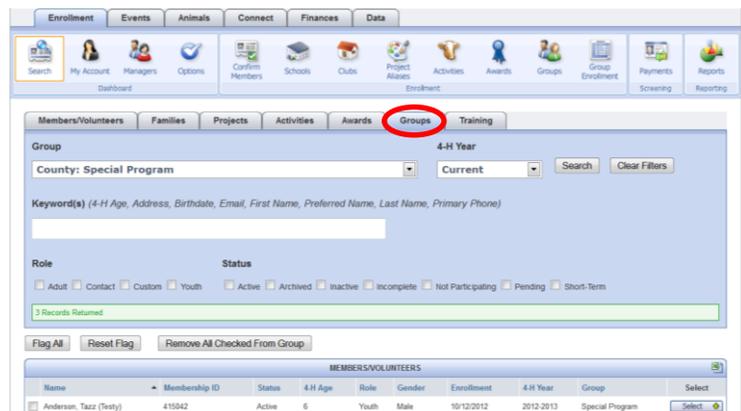
5. Click "Add Flagged"
6. Select Group, Activity or Award.



7. Select the desired Group, Activity or Award.
8. Click "Add Members to..."
9. Click Close.

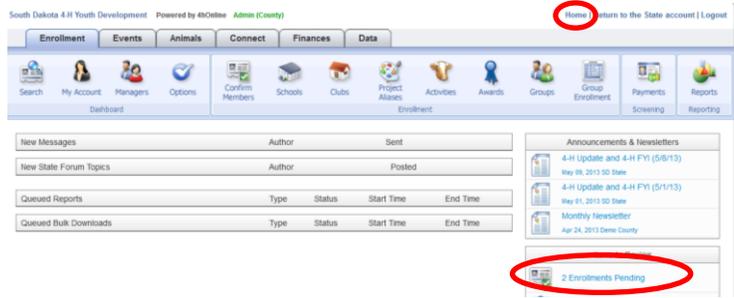


10. Click on the corresponding tab (Group, Activity or Award) to view the members added.



How to Confirm a Member Enrollment

1. Log in to a County account.
2. From the "Home" page, click on the "___ Enrollments Pending" box.



OR from the Enrollment tab, click "Confirm Members."



3. Click "Login" next to the member to confirm enrollment.
NOTE: Members/Volunteers listed as "Awaiting Form Approval" must be approved at the State level before they can be approved at the County level.



4. Click on the "County Review" page.



5. Review the member's information to be sure it is complete and correct.
6. Pay close attention to signatures (initials are not acceptable) and health information.



7. If everything looks good, click "Accept Member."
8. If there are changes needed, click "Send Back to Member" and contact the family regarding the changes needed to accept the enrollment.
9. Only click "Delete Member" if this is a duplicate member profile.



How to Delete a Member Account and Family Profile

NOTE: ONLY delete member accounts that are duplicates.

NEVER delete any accounts that are not duplicates. Some accounts cannot be deleted because they have already been counted on an ES237, have registered for an event or have paid a fee.

1. Click on the “Enrollment” tab.
2. Log in to the duplicate member’s family account.
3. From the “Member List” page, click “Edit” next to the member to delete.
4. Click “DeActivate Member” at the bottom of the Personal Profile page.
5. Click “OK”
6. Repeat Step 3.
7. Scroll to the bottom of the Personal Profile page and click “Delete Member.”
NOTE: If the member was Active at any point, the only option may be to Archive.
8. Repeat Steps 3 – 7 to delete each duplicate member from the family.
9. Once all of the members have been deleted, click “Edit Family.”
10. Click “Delete Family.”
NOTE: The “Delete Family” button will only appear if there are no members in the family.
11. If the members were archived, click “Archive Family.”
12. Click “OK.”



| Member/Volunteer List | | | | | | |
|-----------------------|---------------|-------|---------------|-------------------|------------------|----------------------|
| | Name | Role | Membership ID | Enrollment Status | Last Active Year | Edit |
| 1) | Charity Smith | Youth | 542773 | Active | 2012-2013 | Edit |

Return to Member List Continue >>

[Archive Member](#)

Removes this member from the member list, but member can be reactivated. Select this option if this member may return.

[DeActivate Member](#)

Change this member back to pending for the current year.

Deactivating this profile will send this member back to a pending status for the current year! Are you sure that you want to DeActivate this record?

| Member/Volunteer List | | | | | | |
|-----------------------|---------------|-------|---------------|-------------------|------------------|----------------------|
| | Name | Role | Membership ID | Enrollment Status | Last Active Year | Edit |
| 1) | Charity Smith | Youth | 542773 | Pending | | Edit |

[Delete Member](#)

Only delete a member if they will never return.

Smith Family [Edit Family](#)

1523

Brookings, SD 57006

Address is Not Verified

605-688-4167

Add A New Family Member

select a member type...

ReActivate An Archived Family Member

select a member...

[Archive Family](#)

Removes this family.

[Delete Family](#)

Only delete a family if they will never return.

Deleting this family with remove this family and all members of this family! Are you sure that you want to delete this record?

How to Enter a Group Enrollment

Counties use the Group Enrollment feature in 4HOnline to report any programs or activities in which they impacted non-4-H the youth. This information is automatically added to the current year's ES237 report.

1. Login to a County account.
2. Click on the "Group Enrollment" icon under the Enrollment tab.
3. Click "Add Group Enrollment".
4. Required Fields are in bold.
5. Be sure that the start/end dates are both within the program year.
6. Enter the program/event information.
7. If the Club/Group that participated in the program is not available in the drop-down list, click "Create Group".
8. Enter the Group Information.
9. Click "Add Group".
10. The Group information will automatically fill in after the user select "Add Group".
11. Select the project area that corresponds with the program.
12. Click on "Add Project".
13. Click "Continue".



Group Enrollment - Step 1 (Program Details)

1 Program 2 Member Distribution 3 Volunteer Distribution

Program

Program Name:

Description:

Start Date: 5/16/2012

End Date:

Select the year this record is to count towards

4-H Year: 10/01/2011-09/30/2012

Club / Group: Club: Demo Club

Delivery Mode: 1a) Organized 4-H Community Club

Presenter:

Add New Group [close]

Title:

Group Type: Camp

Delivery Mode: Select a delivery mode

Zip Code: 57006

Number of Hours: 3.00

Number of Youths from military families: 0

Is this a Food and Nutrition Program? (EFNEP or FNP)

Projects

Select a Project: Child Development & Family Life

Project

14. Enter participant information.

NOTE: Duplicates are 4-H Members.

15. Enter the appropriate Racial, Residence, and Grade information.

16. Click “Continue”.

17. Enter the information for NEW Adult and Youth Volunteers.

18. Direct Volunteers are those who have direct contact with the youth.

19. Indirect Volunteers are those who may have helped with paperwork, set-up or tear-down, but had no direct contact with youth.

20. Enter the number of Volunteers who received training for the program/event.

21. When form is complete, check “Submit Form” and click “Save Form”.

22. “Group Enrollments” may be edited at any time until September 30 of the current program year.

23. All Group Enrollments count on the ES237 even if the “Submit Form” check box is not checked.

24. All of the County’s “Group Enrollments” will appear in the list of “Group Enrollment Forms under the “Group Enrollment” icon.

Group Enrollment - Step 2 (Member Distribution)

1 Program 2 Member Distribution 3 Volunteer Distribution

| Gender Distribution | | |
|--|-------|------------|
| Gender (Duplicates are current 4-H participants) | Total | Duplicates |
| Male | 0 | 0 |
| Female | 0 | 0 |
| Sub-Total | 0 | 0 |
| Total (Duplicates removed) | 0 | |

| Racial Distribution Please remove current 4-H participants (duplicates) | | |
|---|-----------|--------------|
| Please indicate the race and ethnicity of participants | Ethnicity | |
| | Hispanic | Non-Hispanic |
| Racial Groups | | |
| (1) White Only | 0 | 0 |
| (2) Black or African American Only | 0 | 0 |

| Racial Distribution | | | | |
|------------------------------------|------------------|--------------|------------------|--------------|
| New Volunteers Only | Adult Volunteers | | Youth Volunteers | |
| | Hispanic | Non-Hispanic | Hispanic | Non-Hispanic |
| (1) White Only | 0 | 0 | 0 | 0 |
| (2) Black or African American Only | 0 | 0 | 0 | 0 |

| Adult Classification Distribution | | |
|-----------------------------------|------------------|--------|
| Classification of Volunteers | Adult Volunteers | |
| | Male | Female |
| Direct | 0 | 0 |
| Indirect | 0 | 0 |
| Sub-Total | 0 | 0 |
| Total | 0 | |

| Youth Classification Distribution | | |
|-----------------------------------|------------------|--------|
| Classification of Volunteers | Youth Volunteers | |
| | Male | Female |
| Direct | 0 | 0 |
| Indirect | 0 | 0 |
| Sub-Total | 0 | 0 |
| Total | 0 | |

| Training Distribution | | | |
|---|------------------|------------------|--------------|
| Volunteers Trained Through 4-H (New Only) | Youth Volunteers | Adult Volunteers | Other Adults |
| A. Leadership - topics relating to organizing, managing and teaching youth in a non-formal education setting: | 0 | 0 | 0 |
| B. Parenting - knowledge and skills relating to developmental and learning needs of children and youth: | 0 | 0 | 0 |
| C. Other - any training topic beyond the two listed above: | 0 | 0 | 0 |

Submit Form (Submit the form when completed. Submitted forms may be edited at anytime)

<< Previous Save Form Cancel Delete

25. To export a list of “Group Enrollment” information to an Excel file click on the drop-down menu under “Quick Exports”.
26. Select the “Current Year”.
27. The report will pop up as an Excel file. Be sure pop-up blockers are turned off.



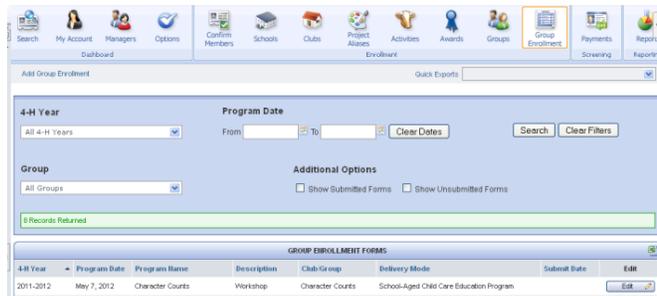
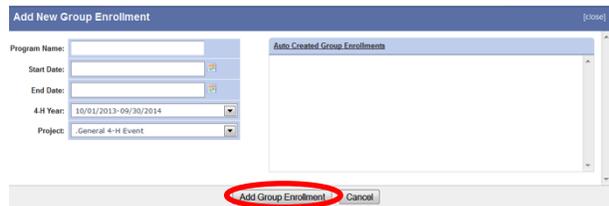
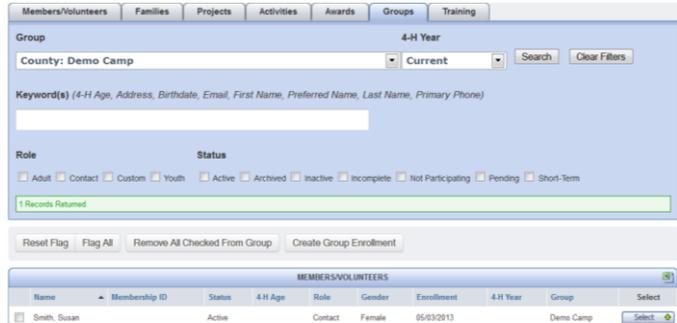
How to Enter a Group Enrollment from an Existing Group

1. Click on the “Enrollment” tab.
2. Click on the “Groups” tab.

3. Select the Group for which to create a Group Enrollment.
4. Click “Search”
5. Flag the members to include in the Group Enrollment, or click “Flag All” to include all members.
6. Click “Create Group Enrollment.”

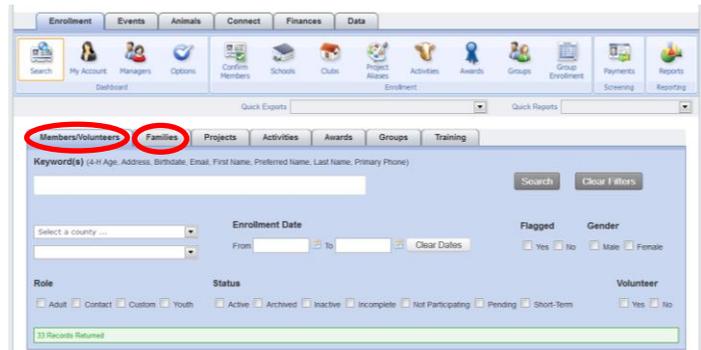
7. Enter the Group information.
8. Click “Add Group Enrollment.”

9. A Group Enrollment with this information will appear in the list of Group Enrollments under the Group Enrollments icon.
10. Edit the Group Enrollment to add additional information regarding participants who were not 4-H members.
11. The 4-H members included on the Group Enrollment will count on the ES237 projects area as well as the total number of duplicates.



How to Flag Members or Families

1. Click on the “Enrollment” tab.
2. Click on the “Members/Volunteers” tab to flag individual members. Click on the “Families” tab to flag Families.



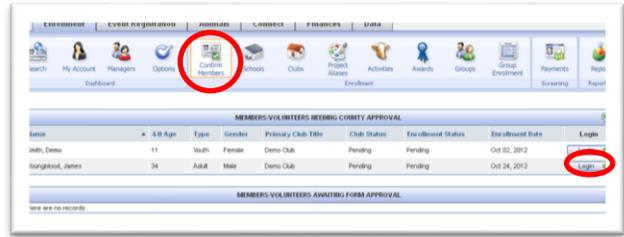
3. Mark the checkbox next to each member or family name to flag the member or family.

The screenshot shows a table titled 'MEMBERS/VOLUNTEERS' with columns: Name, V, Years, Member #, Status, 4H Age, Role, Gender, Primary Club, Enrollment, Approved, and Login. The first row is 'Person, Junkyard (Junkyard)' with a checkbox checked and circled in red. The second row is 'Anderson, Tazz (Testy)'. The third row is 'Contact, Joe'. The fourth row is 'Contact, Test'. The fifth row is 'demo, Chace'. The sixth row is 'Jones, Dad'. There are buttons for 'Reset Flag', 'Add Flagged', and 'Add Family' at the top left of the table area.

| Name | V | Years | Member # | Status | 4H Age | Role | Gender | Primary Club | Enrollment | Approved | Login |
|---|---|-------|----------|------------|--------|---------|--------|--------------|--------------|--------------|-------|
| <input checked="" type="checkbox"/> Person, Junkyard (Junkyard) | | 4 | 415077 | Inactive | 11 | Youth | Male | Demo Club | Mar 02, 2012 | Mar 08, 2012 | Login |
| <input type="checkbox"/> Anderson, Tazz (Testy) | | 2 | 415042 | Active | 6 | Youth | Male | Demo Club | Oct 12, 2012 | Dec 27, 2012 | Login |
| <input type="checkbox"/> Contact, Joe | | 1 | | Incomplete | | Adult | Male | | Feb 11, 2013 | | Login |
| <input checked="" type="checkbox"/> Contact, Test | | | | Active | | Contact | Female | | May 11, 2012 | | Login |
| <input type="checkbox"/> demo, Chace | | 1 | 543665 | Active | 12 | Youth | Male | Demo Club | Apr 05, 2013 | May 09, 2013 | Login |
| <input type="checkbox"/> Jones, Dad | V | 1 | | Incomplete | 27 | Adult | Male | | Dec 10, 2012 | | Login |

How to Give Leaders Club Access

1. Counties may only give Club access to registered volunteers. These are volunteers who have completed the Volunteer Work Agreement and have been approved by the State 4-H Office.
2. After the State 4-H Office approves the volunteer, the County office must "Accept" the volunteer's enrollment.
3. If the volunteer is already Active, go to step 25.
4. Click on "Confirm Members."
5. Click "Login" next to the Volunteer's name.
6. Click on "County Review".



7. In order to have Club access, "Adult Volunteer" must be answered "Yes".
8. If "Adult Volunteer" is "No", go to Step 12 to correct it.
9. A Club and Volunteer Type must be entered under "Club List".
10. If the Club or Volunteer Type is blank, go to Step 15 to correct it.
11. If all of the information is correct, click "Accept Member." Proceed to Step 23.
12. To correct the "Adult Volunteer" field, click on the "Personal Information" page.



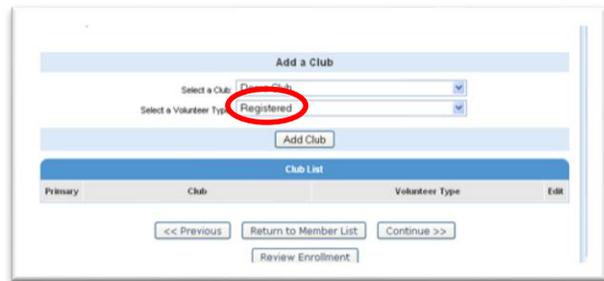
13. Scroll down to the "Volunteer Section". Choose "Yes"
14. Scroll down to the bottom of the page and click "Continue" to save the changes.



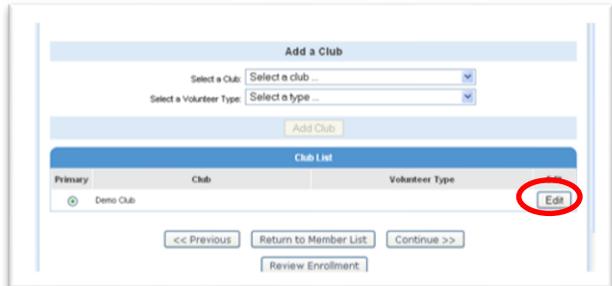
15. To correct the Club enrollment and Volunteer Type, click on the "Participation" page.



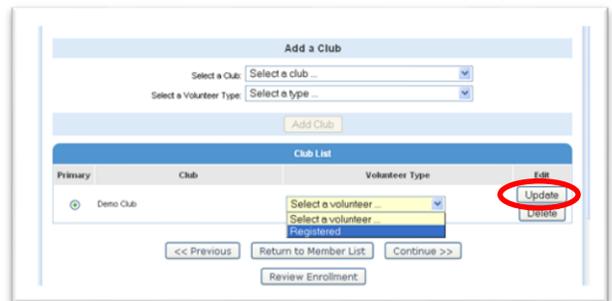
16. If both the Club and the Volunteer Type are missing, select a Club from the drop-down menu.
17. Select a Volunteer Type from the second drop-down menu.
18. Click "Add Club".



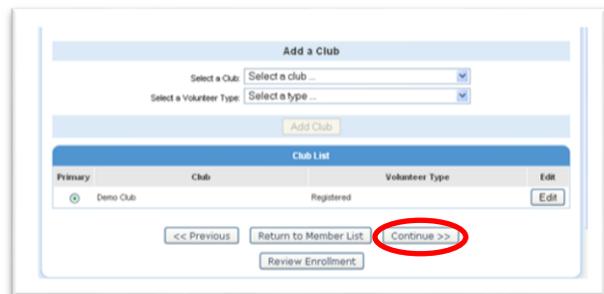
19. If only the Volunteer Type is missing, click the "Edit" button next to the Club in the "Club List"



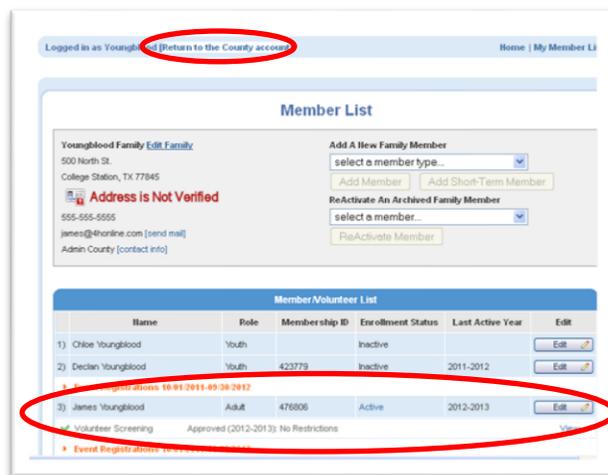
20. Select the appropriate Volunteer Type and click "Update".



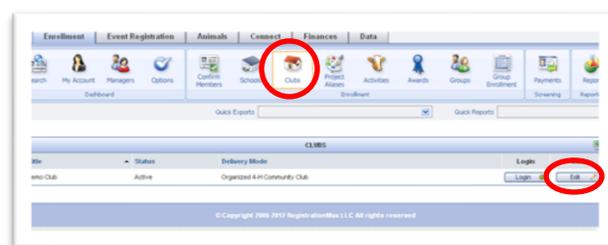
21. Once the Club and Volunteer Type are filled in, click "Continue" to save the changes.
22. Click Review Enrollment to return to the County Review page. Scroll to the bottom of the page and click "Accept Member".



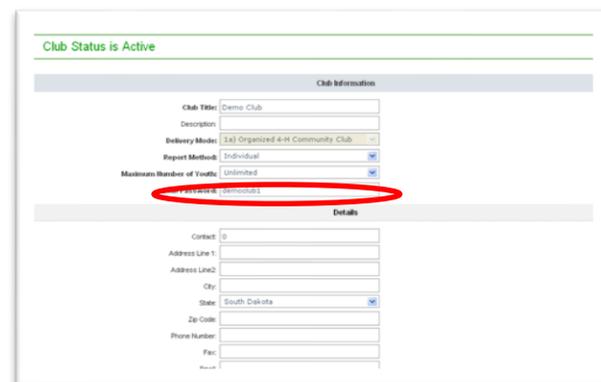
23. Upon County acceptance, the volunteer enrollment status should read “Active” and there should be a green checkmark next to the Volunteer Screening.
24. Click “Return to County Account.”



25. From the County screen, click on the “Clubs” icon.
26. Click “Edit” next to the Club to give a leader Club access.



27. Be sure all Club information is up-to-date. IMPORTANT: There MUST be something in the “Contact” field.
28. Enter as much information about the Club as possible. This is very important as we need the Club’s contact information for reports.

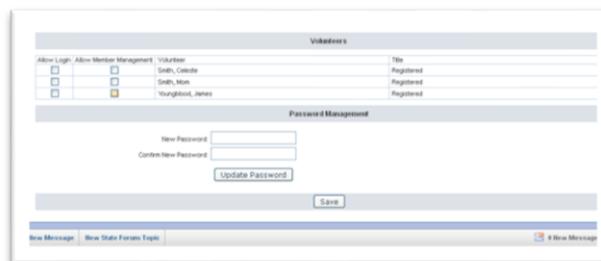


29. Scroll down to the bottom to the “Volunteers” list.
30. Check the level of access to give each leader (nothing checked = no Club access).

“Allow Login” simply allows the leader to login, confirm members*, view member records and run reports** for members in their Club. The leader may not edit current member information or add members.

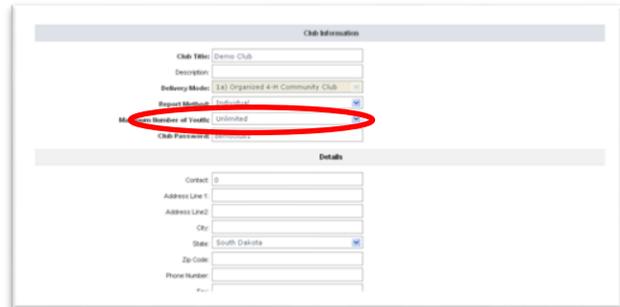
*NOTE: If a leader confirms a member, the County still must “Accept” the member. The County will ALWAYS know when a new member is added to the system or when a current member re-enrolls.

**NOTE: Club leaders may run “Standard” Reports as well as any “Shared” reports for which the County or State has chosen to “Share with Clubs.”



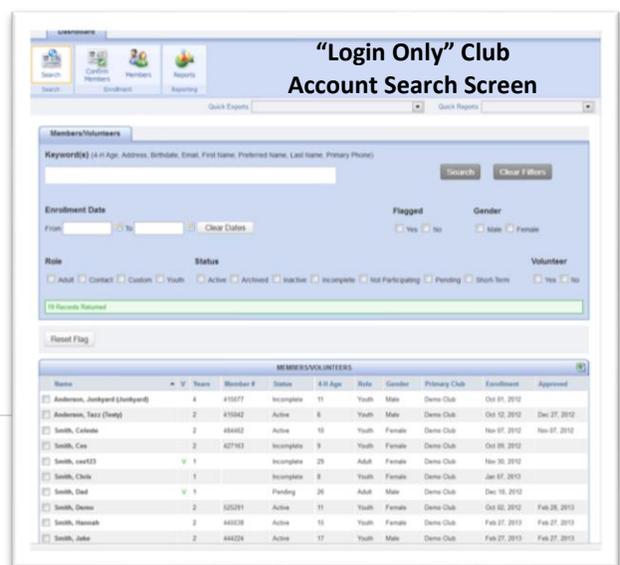
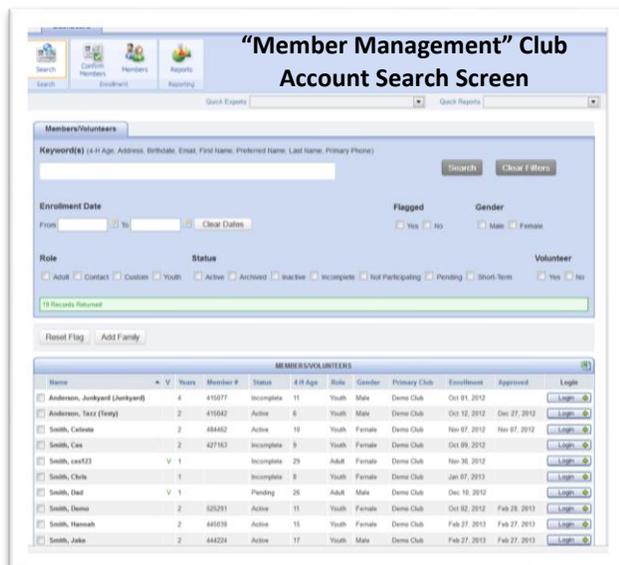
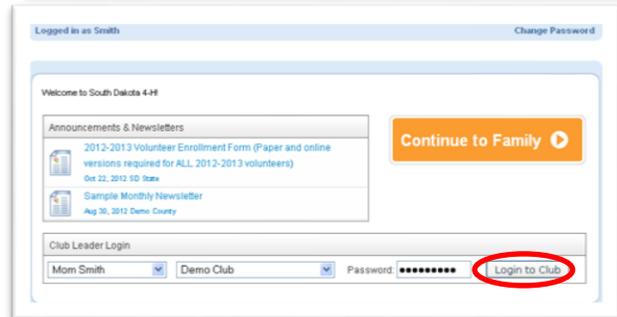
“Allow Member Management” allows leaders to confirm members, add and edit member records and run reports.
 NOTE: “Allow Login” must also be checked to give “Member Management” access.

31. *Optional:* Update the Club password.
32. Click “Save.”
33. Contact the leaders granted Club access. Give them the Club password and the [“How to Login to a Club Account”](#) Help Sheet.



HOW TO LOGIN TO A CLUB ACCOUNT – Instructions for Leaders (separate Help Sheet available for distribution)

1. Login to a family account.
2. If granted “Club Access”, the “Club Leader Login” will appear.
3. Select the appropriate “Profile” and “Club”.
4. Enter the Club password received from the County office.
5. Click “Login to Club.”
6. Contact the County Office for more information regarding the level of access granted and any Help Sheets needed.

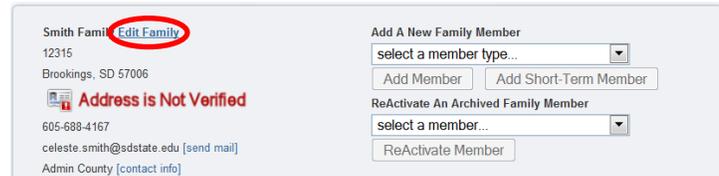


How to Move a Family/Member to a Different County

1. Log in to a County account.
2. Click on the “Enrollment” tab.
3. Log in to the family account from the Members/Volunteers for Families search screen.



4. Click “Edit Family.”

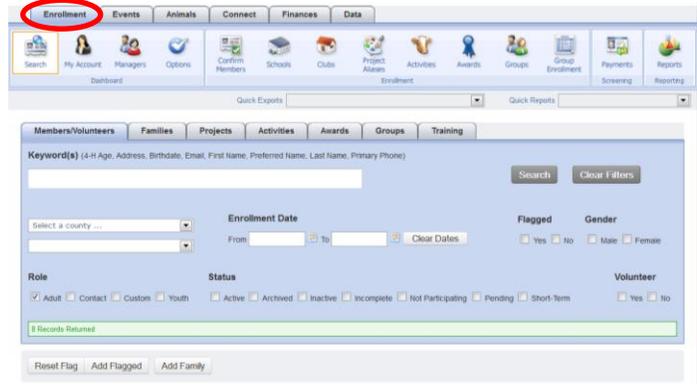


5. Select the Family’s new County.
6. Check “Update member records with the same address.”
7. Click “Continue.”
8. The member’s new county will receive a message that the family has moved to their county.

A screenshot of the 'Family Information' form. The form is titled 'Family Information' and has a sub-section 'Profile Information'. It contains several input fields: Email (celeste.smith@sdstate.edu), Last Name (Smith), Mailing Address (12315), City (Brookings), State (South Dakota), Zip Code (57006), and Primary Phone (605-688-4167). There are also dropdown menus for 'Correspondence Preference' (Mail) and '4-H County' (Demo). The '4-H County' dropdown is circled in red. Below the form, there is a checkbox labeled 'Update member records with the same address' which is also circled in red. At the bottom, there are two buttons: 'Reset Password' and 'Continue >>'.

How to Move a Member to a Different Family

1. Click on the “Enrollment” tab.
2. Log in to the member’s family account from the Member/Volunteers or Families search screen.



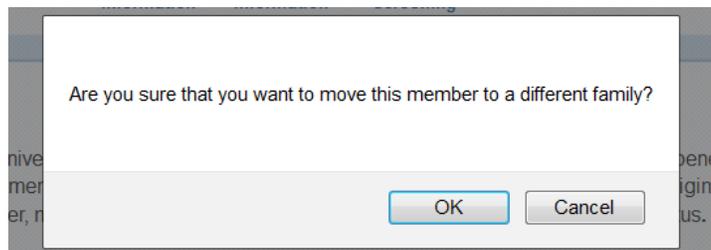
3. From the “Member List” page, click “Edit” next to the member to move to a different family.

| Member/Volunteer List | | | | | | |
|-----------------------|---------------|-------|---------------|-------------------|------------------|----------------------|
| | Name | Role | Membership ID | Enrollment Status | Last Active Year | Edit |
| 1) | Charity Smith | Youth | 542773 | Active | 2012-2013 | Edit |
| 2) | Jack Smith | Adult | 542978 | Active | 2012-2013 | Edit |

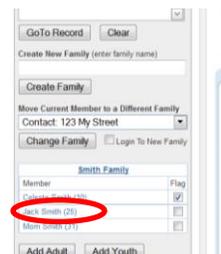
4. From the Manager Control Panel, select the family to which the member should move.
5. Click “Change Family.”
6. Check “Login to New Family” to view the new family as soon as the record is moved.



7. Click “OK”



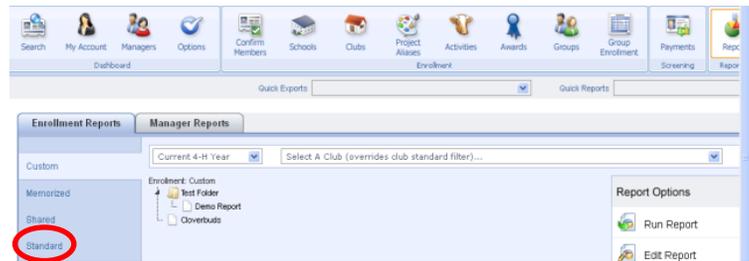
8. The member record will now appear in the new family.



How to Print Mailing Labels

There are several ways to print mailing labels in 4HOnline. Here are the steps for the simplest way to print them.

1. Click on the “Reports” icon.
2. Click on “Standard” on the left side



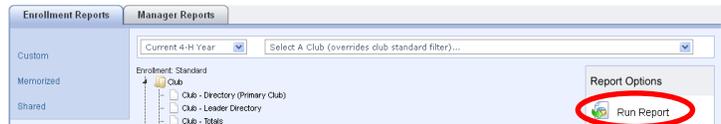
3. Select either Member or Family Labels from the list of Standard Reports.

Family Labels: One label per family.

Member Labels: One label per member.



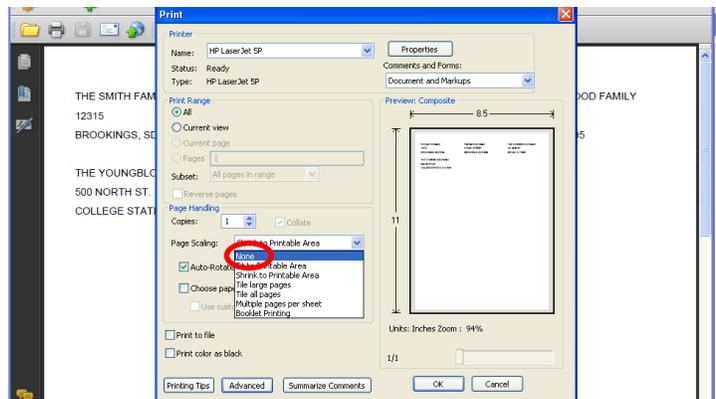
4. Click “Run Report.”



5. To print the labels, click the “Save” button.



6. After the PDF opens, click on the Print button. Be sure to set the Page Scaling at “None”.
7. Print the labels!



8. To print labels for only one Club, select the Club from the drop-down list at the top of the reports list. Follow steps 3 – 7.



How to Process Duplicate Member Records

1. To find existing duplicate member, from a County account, click the Reports icon under the Enrollment tab.
2. Select the “Member – Potential Duplicates” Report
3. If no report pops-up, the program has not found any potential duplicates.



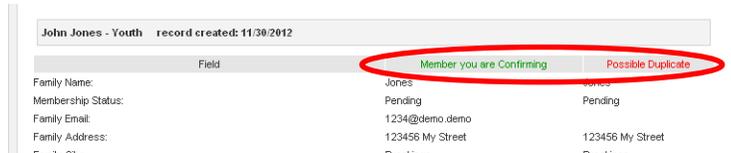
4. To find a pending duplicate record, click “Confirm Members.”
5. Login to the Member Account.



6. Click on “County Review.”



7. If the new member record is possibly a duplicate of an existing member record, the information will appear in two columns.



NOTE: It is very important that each member only have one record. Our goal is to delete the new record and keep and update the old record in order to maintain an accurate member history.

The County has two options at this point:

- a. Process the member’s reenrollment from the county side using a printed version of the member’s information in their new account. For this option, follow steps 8 – 30.
- or
- b. Ask the family to redo the re-enrollment using the existing account. For this option, follow steps 14 – 26.

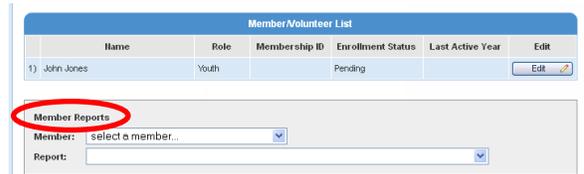
8. Click “Return to the County account”



9. From the “Enrollment” tab, “Members/Volunteers” search screen, log in to the pending member’s account.

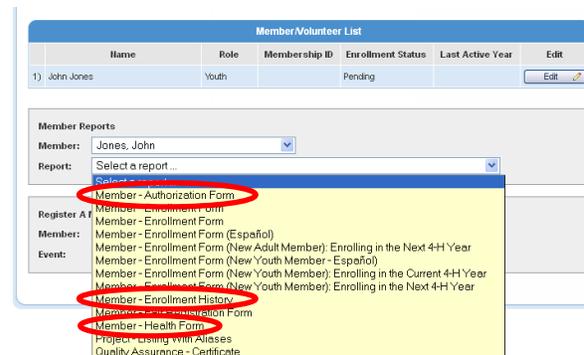


10. From the “Member List” screen, scroll to the bottom to the “Member Reports.”



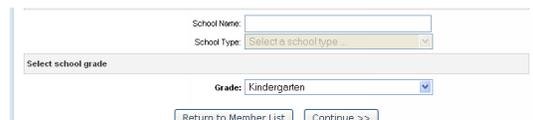
11. Select and print the following reports to use to update the member’s existing account:

- a. Member – Authorization Form
 - b. Member – Enrollment History
 - c. Member – Health Form
- NOTE: The reports will automatically open in Adobe. Be sure the pop-up blocker is disabled.



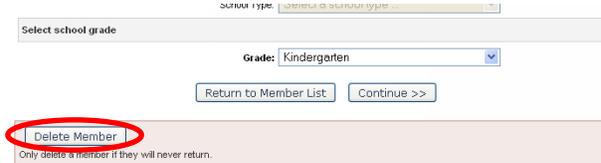
12. After printing the reports, click “Edit” next to the member’s name.

13. Write down the member’s school and grade. These items do not print on the Enrollment History.



14. Scroll to the bottom and click “Delete Member.”

15. If the duplicate was Active this year, click “Deactivate Current Year,” log in to the account again, scroll to the bottom of the Youth Profile Page and click “Delete Member.”



16. If the account was Active in the previous year, the only option is to Archive the duplicate account. Scroll to the bottom of the Youth Personal Information page and click “Archive Member.”



- 17. Check for duplicate family accounts by searching for the family name under the “Families” tab under the “Enrollment” tab.
- 18. If the family created a duplicate “Family” account, after all members are deleted, click “Edit Family.”



YOU CAN NOT REGISTER FOR AN EVENT UNTIL YOUR ENROLLMENT HAS BEEN ACCEPTED AND YOUR STATUS IS SET TO ACTIVE. If your enrollment status is 'Inactive' or 'Incomplete', click the 'Edit' button to review and submit your record for approval.

19. If the Family updated their email address, copy and paste it into a Word Document.
20. Delete the duplicate family account.

Family Information

Profile Information

Email: 1234@demo.demo (circled in red)

Last Name: Jones

Mailing Address: 123456 My Street

City: Brookings

State: South Dakota

Zip Code: 57006

Primary Phone: 605-688-4167

Correspondence Preference: Mail

4-H County: Demo

Update member records with the same address:

Password Management

Reset Password

Continue >>

Archive Family

Delete Family (circled in red)

21. Click "Return to the County account."

Logged in as Jones: John | Return to the County account (circled in red) | Home | My Member List

22. From the "Family" or "Member/Volunteer" search screen, log in to the existing (old) family account.

| Contact, Text | Active | Contact | Female | May 11, 2012 | Login | | | |
|---------------|----------|---------|------------|--------------|------------------------|--------------|--------------|-------|
| Jones, John | Inactive | Youth | Male | Apr 24, 2012 | Login (circled in red) | | | |
| Smith, Alexia | 1 | 471963 | Short-Term | Youth | Female | Oct 12, 2012 | Oct 12, 2012 | Login |

23. Click "Edit Family."
24. Paste the email address from the new family account into the existing account.
25. Click "Continue" to save the changes.
26. If the county has chosen to have the family redo their reenrollment, contact the family to login to the existing account and resubmit re-enrollments.
27. If the county will redo the reenrollment, continue to step #28.

Jones Family | Edit Family (circled in red)

123456 My Street
Brookings, SD 57006

Add A New Family Member

select a member type...

Add Member | Add Short-Term Member

Family Information

Profile Information

Email: 1234@demo.demo (circled in red)

Last Name: Jones

Mailing Address: 123456 My Street

City: Brookings

State: South Dakota

Zip Code: 57006

Primary Phone: 605-688-4167

Correspondence Preference: Mail

4-H County: Demo

Update member records with the same address:

Password Management

Reset Password

Continue >> (circled in red)

28. Click "Edit" next to the member's name.
29. Use the printed enrollment forms to update the member's enrollment for the current year.

NOTE: The County manager is not able to sign the "Authorizations" page. Use the dates and signatures on the printed report to sign the "Authorizations." File the printed reports as proof of the date and signatures.

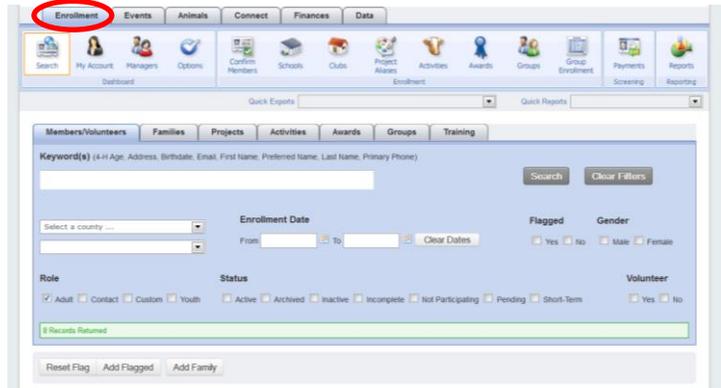
30. Submit the member's enrollment and confirm as per usual procedures.

If your enrollment status is 'Inactive' or 'Incomplete', click the 'Edit' button to review and submit your record for approval

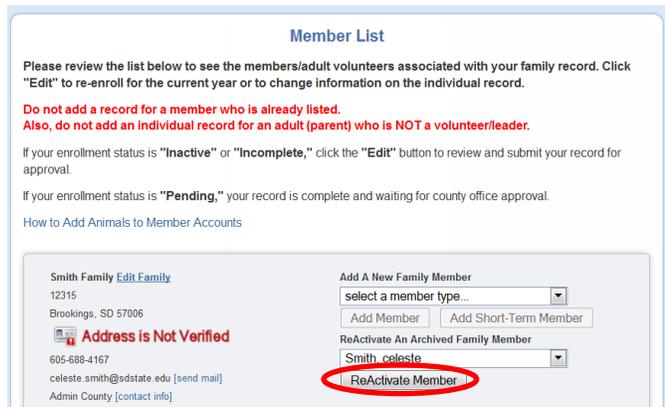
| Member/Volunteer List | | | | | | |
|-----------------------|------------|-------|---------------|-------------------|------------------|-----------------------|
| | Name | Role | Membership ID | Enrollment Status | Last Active Year | Edit |
| 1) | John Jones | Youth | | Inactive | | Edit (circled in red) |

How to Reactivate an Archived Member

1. From a County account, click on the “Enrollment” tab.
2. Log in to the Archived member’s family account from the Members/Volunteers or Families tab.



3. From the “Member List” page, select the Archived family member’s name under “ReActivate An Archived Family Member.”
4. Click “ReActivate Member”



5. The member will now appear on the Member List as Inactive.
6. Click “Edit” to re-enroll the member for the current year.

| 10/74/1 | | 05/01/2013: 2013 South Dakota 4-H Rodeo | | Approved | View / Print | |
|---|---------------|---|--------|----------------------------|--------------|------------------------------|
| 4) | celeste Smith | Youth | 410321 | inactive | 2011-2012 | Edit |
| ▶ Event Registrations 10/01/2011-09/30/2012 | | | | | | |
| ▼ Event Registrations 10/01/2012-09/30/2013 | | | | | | |
| 10749) | | 05/01/2013: 2013 South Dakota 4-H Rodeo | | Pending at the state level | | View / Print |
| 5) | Ces Smith | Youth | 427163 | Incomplete | 2011-2012 | Edit |
| ▶ Event Registrations 10/01/2011-09/30/2012 | | | | | | |
| 6) | ces123 Smith | Adult | | Incomplete | | Edit |

How to Set County Options

Project Selection Deadline, Family Access Options, Invoice Addresses

1. Click on the “Enrollment” tab.
2. Click “Options.”
3. At this point, _____ does not charge an Animal/Livestock fee. If at some point a fee is instituted, Counties will have the option to enter the County 4-H Office information for the invoice instructions.
4. Counties may change the family access settings here.
NOTE: The County may select “Do Not Allow New Families to Create Their Record” to prevent existing families from creating duplicate accounts. However, this would require new families to submit paper enrollment forms.
5. Set the last day for a member to edit projects here. Projects will lock at 11:59 p.m. CT on this date.
6. At this point _____ does not charge an enrollment fee. If at some point a fee is instituted, Counties may enter the County 4-H Office information for the invoice instructions.
7. Enter the County 4-H Office address and invoice instructions for any County event set up in 4HOnline.
8. “Miles from State Fairgrounds” is used to determine checkout times at the fair (calculate mileage from the County 4-H office).
9. At this point, we do not use the Fair Registration Form Text field.
10. Be sure to click “Save” to save any changes in County Options.

The screenshot displays the 4HOnline interface. At the top, the navigation menu includes 'Enrollment', 'Events', 'Animals', 'Connect', 'Finances', and 'Data'. The 'Enrollment' and 'Options' tabs are circled in red. Below the navigation, there are sections for 'Hide Projects', 'Hide State Groups', and 'Project Leaders'. The main content area is titled 'Options' and includes a section for 'Animal/Livestock' with a text area for 'Animal/Livestock Invoice Instructions'. Below this is a section for 'For Families' with two checkboxes: 'Do Not Allow New Families to Create Their Record' and 'Do Not Allow Existing Families to Edit Their Record'. The next section is 'Month and Day of Last Project Selection Date' with two dropdown menus: 'Last Month for Member Project Selection' (set to 'May') and 'Last Day for Member Project Selection' (set to '31'). Below this is a section for 'Enrollment Invoice Instructions' with a text area. The next section is 'Events' with a text area for 'Event Invoice Instructions'. Below this is a section for 'Fair' with a text field for 'Miles from State Fairgrounds' (set to '0.00'). The final section is 'Reports' with a text field for 'Fair Registration Form'. At the bottom, a 'Save' button is circled in red.

How to Set Up Project Aliases

Project Aliases are a way to customize the State Project List for county use. These are especially helpful for Cloverbud projects. A county can add aliases for any state project.

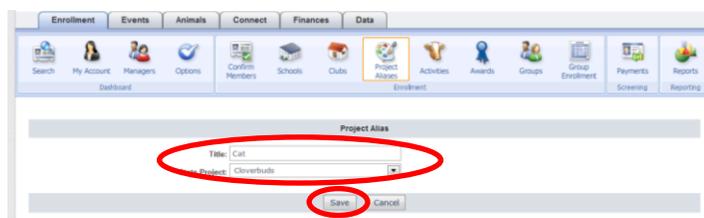
1. Log in to a County Account.
2. From the “Enrollment” tab, click on “Project Aliases”.



3. Click “Add Project Aliases”



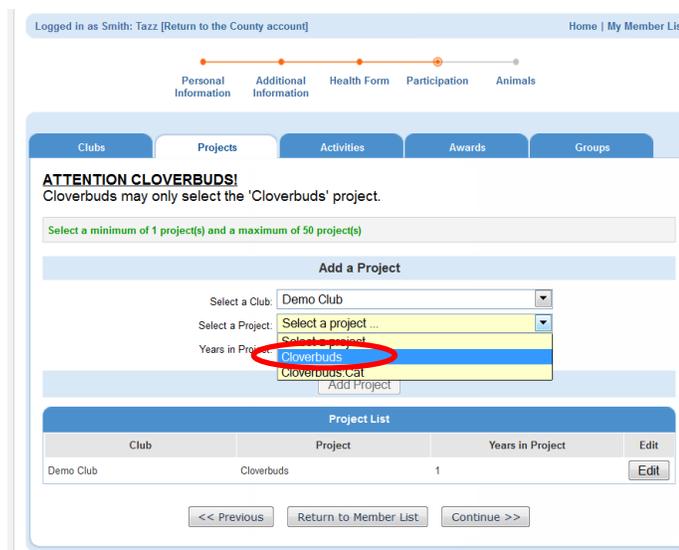
4. Type the Alias Title.
5. Select the corresponding State Project from the drop-down menu.
6. Click “Save”



7. The Project with its Alias will appear in the list of Project Aliases.



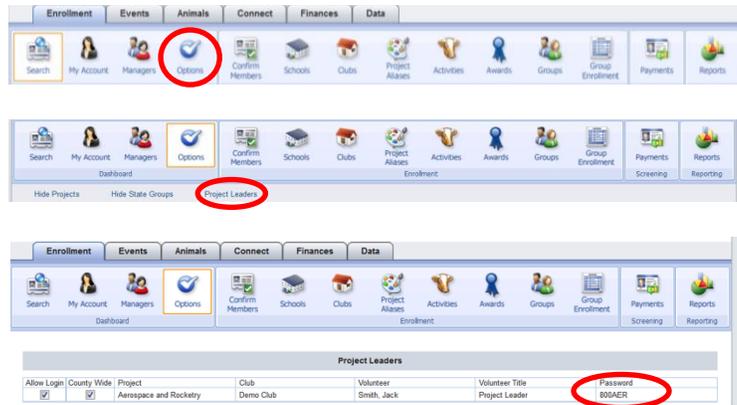
8. When a member adds a project, the project aliases appear in their list of projects under the “Participation” tab in their account.



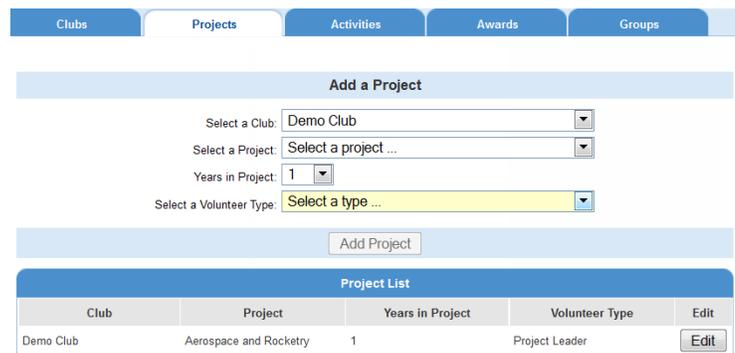
How to Set Up Project Leader Accounts

Give Project Leaders access to contact information for members enrolled in a specific project in the leader's Club or County.

1. Log in to a County Account.
2. From the Enrollment tab, click on Options.
3. Click "Project Leaders."
4. Check "Allow Login" to give the leader access to contact information for members in the leader's club who are enrolled in that project area.
5. Check "County Wide" to give the leader access to contact information for all members in the leader's county who are enrolled in that project area.
6. Share the "How to Login to a Project Leader Account" Help Sheet and the project password with the Project Leader.
7. If a Project Leader does not appear on the list mentioned above. Click "Search."
8. Login to the Project Leader's profile.
9. Click "Edit" next to the Project Leader's name.
10. Click on the Participation page.
11. Click on the Projects tab.
12. Select the Club.
13. Select the Project.
14. Select "Project Leader" as the Volunteer Type.
15. Click "Add Project."
16. Click "Continue."
17. Return to the County Account and begin at Step 2.



NOTE: Project passwords are maintained at the State level. Contact the State 4HOnline Administrator if a new password is needed.



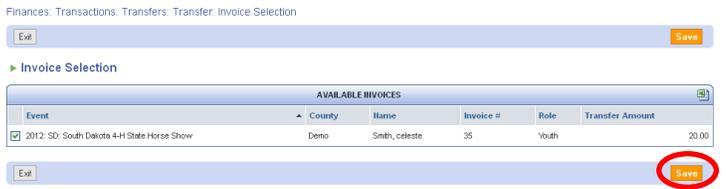
How to Submit a County Transfer

County payment process for Event Registrations and Volunteer Screenings

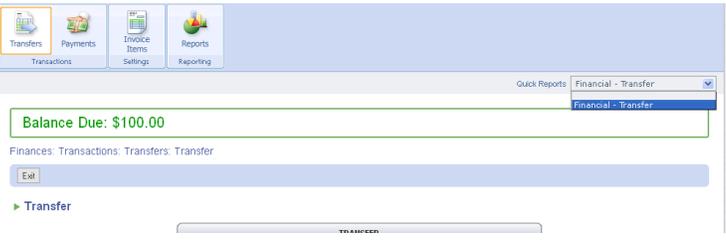
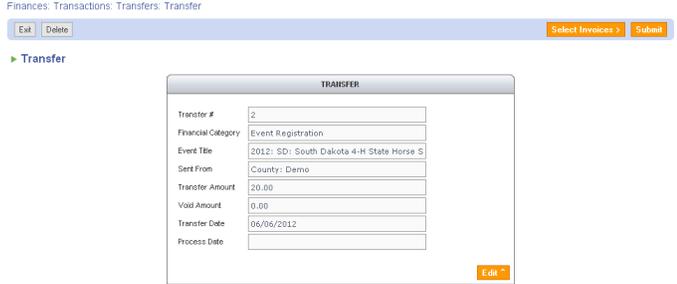
1. Log in to a county account.
2. Event Checks Due on the Home page indicates registration payments are due.
3. When the County check is ready to send to the State 4-H Office, (usually after all of the county's members have registered), click on the "Event Checks Due" button.
4. Select which event for which to submit payment. Click "Create."
5. Select the youth invoices to include in the county transfer.
NOTE: A member receives and pays an "Invoice" whereas a county receives and pays a "Transfer."
6. Click "Save."
7. Check the "Transfer" information.
8. The State 4-H Office will enter the Process date upon receipt of the county check.
9. If everything is correct, click "Submit."
10. Submitted transfers cannot be deleted. If a refund is needed, contact the State 4-H Office to void the transfer.
11. After submitting the transfer, a Quick Reports drop-down appears. Print the "Financial - Transfer" and send it with county check to the State 4-H Office.
12. Click "Exit" to return to the Transfer List.
13. Click the "Finance" tab then click the Transfer icon to view the transfer status for all county transfers. The State 4-H Office will update the processed and paid information upon receipt of the county check.



| Event | County | Record Count | Transfer Total | |
|---|--------|--------------|----------------|--|
| 2012: SD: General Event | Demo | 1 | 5.00 | Create |
| 2012: SD: South Dakota 4-H State Horse Show | Demo | 1 | 20.00 | Create |



Balance Due: \$20.00 [Add Payment](#)



This screenshot shows the 'TRANSFER LIST' table with the following data:

| Transfer # | Date | Related To | County | Amount | Submitted | Processed | Paid | Edit |
|------------|--------------|---|--------|--------|-----------|--------------|------|-------------------|
| 1 | May 31, 2012 | 2012: SD: Practice Event | Demo | 2.00 | ✓ | May 31, 2012 | ✓ | Edit |
| 2 | Jun 06, 2012 | 2012: SD: South Dakota 4-H State Horse Show | Demo | 20.00 | ✓ | | | Edit |

How to Switch a Contact to an Adult

1. Log in to a County or District account.
2. Click on the “Enrollment” tab.
3. Log in to the Contact’s family account.
4. From the “Member List” page, click “Edit” next to the member to switch to an Adult.
5. Scroll to the bottom of the Personal Information page.
6. Click “Change Contact to Adult.”



| Member/Volunteer List | | | | | | |
|-----------------------|-------------|---------|---------------|-------------------|------------------|-------------|
| | Name | Role | Membership ID | Enrollment Status | Last Active Year | Edit |
| 1) | Joe Contact | Contact | | Active | | Edit |

Emergency Contact Email: 000-000-4 10 /

Emergency Contact Relationship:

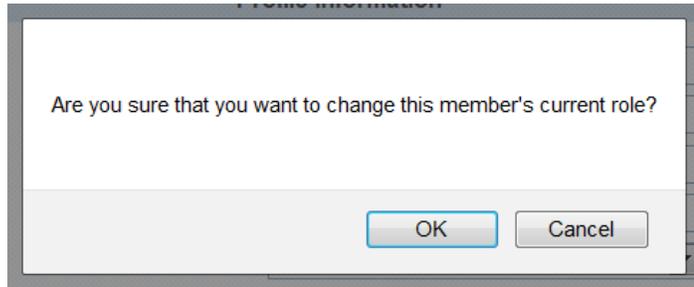
4-H County:

Removes this member from the member list, but member can be reactivated. Select this option if this member may return.

Only delete a member if they will never return.

Only change a member's role if you are sure they will remain in the new role.

7. Click “OK”



8. Use the paper Volunteer Work Agreement to complete the enrollment information, or contact the individual to log in to the family account to complete and submit the Adult Volunteer enrollment.

Adult Personal Information

South Dakota State University is an Affirmative Action/Equal Opportunity Employer and offers all benefits, services, education and employment opportunities without regard for race, color, creed, religion, national origin, ancestry, citizenship, age, gender, marital status, pregnancy, sexual orientation or Vietnam Era Veteran status.

NOTE: The Emergency Contact should be someone other than the member's parent/guardian. Parent contact information is already provided. In the case of an emergency, parents/guardians are contacted first. If they are unavailable, the Emergency Contact is contacted.

Profile Information

Email:

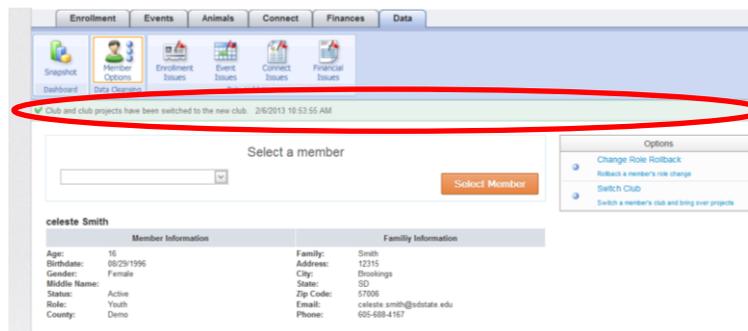
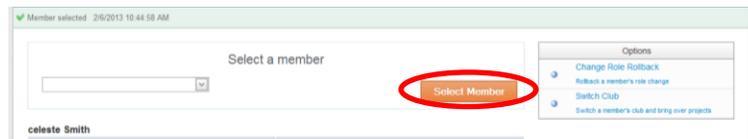
First Name:

Middle Name:

Last Name:

How to Switch a Member's Club with Projects

1. Log in to a County Account.
2. Click on the "Data" tab.
3. Click on "Member Options"
4. Type the member's name in the drop-down box (last name, first name).
5. Click "Select Member"
6. Click "Switch Club"
7. Select the member's current club.
8. Select which club to switch the member to.
9. Click "Switch Club"
10. When the club and club projects have been switched to a new club, the user will see a confirmation message at the top of the page.

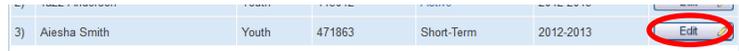


How to Switch a Short-Term Member to a Youth Member

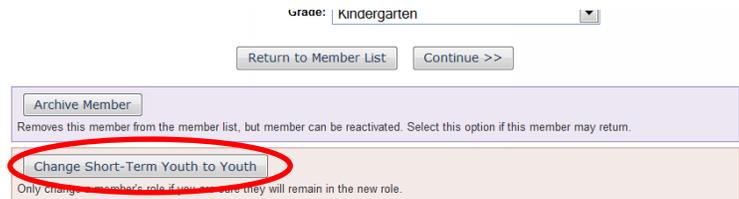
1. Click on the “Enrollment” tab.
2. Log in to the Short-Term member’s family account.



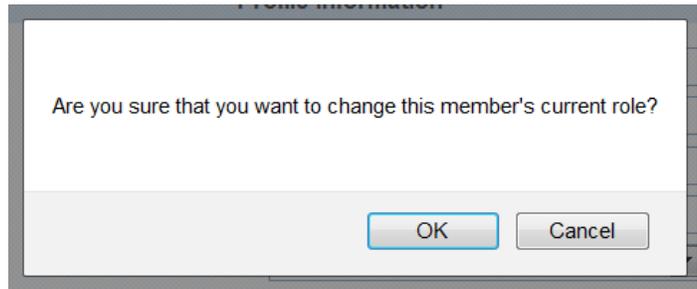
3. From the “Member List” page, click “Edit” next to the Short-Term member to switch to a youth.



4. Scroll to the bottom of the Personal Information page.
5. Click “Change Short-Term Youth to Youth.”



6. Click “OK”



7. Use the paper Enrollment Form to complete the enrollment information, or contact the family to log in to the family account to complete the enrollment process.

Youth Personal Information

South Dakota State University is an Affirmative Action/Equal Opportunity Employer and offers all benefits, services, education and employment opportunities without regard for race, color, creed, religion, national origin, ancestry, citizenship, age, gender, marital status, pregnancy, sexual orientation or Vietnam Era Veteran status.

NOTE: The Emergency Contact should be someone other than the member's parent/guardian. Parent contact information is already provided. In the case of an emergency, parents/guardians are contacted first. If they are unavailable, the Emergency Contact is contacted.

Copy parent information from another youth record

Profile Information

Email

First Name

Middle Name

How to Upload Newsletters and Announcements

1. Login to a County or District account.
2. Click on the “Connect” tab.



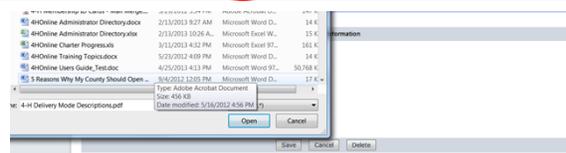
3. Click on the “Newsletters” icon.
4. Select “Add Newsletter.”



5. Enter the Newsletter Title.

6. Enter the upload date.
7. Select “Share with Members” and/or “Share with Managers”

8. Click on “Browse” to select the appropriate file to upload.
NOTE: The file must be in a .pdf format.
9. Click “Save.”



10. Once the newsletter is uploaded, it will appear in the list of newsletters.
11. Click “Edit” to delete any outdated newsletters and remove them from the family and manager home pages.

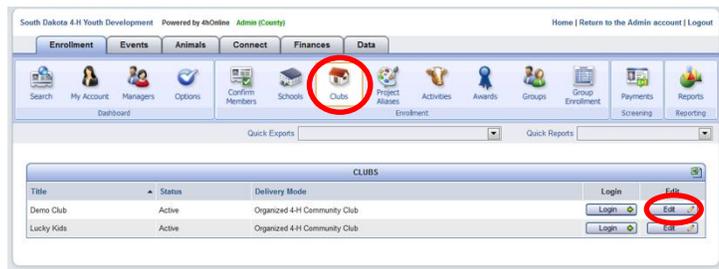
| Date | Title | Share With Members | Share With Managers | File Attached | Edit |
|--------------|---------------------------|--------------------|---------------------|---------------|------|
| Apr 24, 2013 | Monthly Newsletter | Yes | Yes | Yes | Edit |
| Aug 30, 2012 | Sample Monthly Newsletter | Yes | No | Yes | Edit |
| May 08, 2012 | 4-H FYI | Yes | Yes | No | Edit |

12. Newsletters and Announcements will appear on the Family home page for families in the County.

How to Update Club Information

Contact the State 4-H Office to add a new Club or close an existing Club.

1. Login to a County account.
2. Click on the “Enrollment” tab.
3. Click on the “Clubs” icon.
4. Click “Edit” next to the desired Club.



5. Update the Club information.

Club Information

Club Title: Demo Club

Description:

Agency:

Delivery Mode: 1a) Organized 4-H Community Club

Report Method: Individual

Maximum Number of Youth: Unlimited

Club Password: democlub1

Details

Contact:

Address Line 1:

Address Line 2:

City:

State: South Dakota

Zip Code:

Phone Number:

Fax:

Email:

Web Site:

Newsletter Site:

Meeting Location:

Meeting Time:

Comments:

Is this club in a Racially Mixed Community?

Is this club integrated?

6. Click “Save.”

Chartering

Employer Identification Number (EIN):

Documents / Images

2. Chartering Application

3a. Constitution and Bylaws - Club

3b. Constitution and Bylaws - Affiliate

4. Dissolution Statement

Additional Chartering Documents

10. Audit Report

Charter Approval Form

Charter Certificate

Volunteers

| Allow Login | Allow Member Management | Volunteer | Title |
|-------------------------------------|-------------------------------------|-------------------|-------------|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Smith, Dad | Club Leader |
| <input type="checkbox"/> | <input type="checkbox"/> | Smith, Jack | Club Leader |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Smith, Leader | Club Leader |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Smith, Mom | Club Leader |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Smith, Mom | Club Leader |
| <input type="checkbox"/> | <input type="checkbox"/> | Youngblood, James | Club Leader |

Password Management

New Password:

Confirm New Password:

How to Update Family Contact Information - County

1. Click on the “Enrollment” tab.
2. Log in to the family account

3. Click “Edit Family.”

4. Update the family’s contact information.
 5. If this change affects all of the members in the family, check “Update member records with the same address.”
 6. Click “Continue.”
- NOTE: Because a member often has a different email address from the family, the member email address does not update when “Update member records with the same address” is checked.

Reports for Managers

Reports are a very useful tool in 4HOnline. A user may include any information contained in a member's profile or on an event registration form on a report.

- Standard Reports: Reports created and designed by 4HOnline
- Shared Reports: Reports created in a higher level account (for example: State level) and shared with other managers.
- Memorized Reports: Standard or Shared reports with additional filters.
- Custom Reports: Reports created by the user.
- Quick Exports: Reports created and designed by 4HOnline that export directly to Excel.
- Quick Reports: Reports created and designed by 4HOnline that export directly to a PDF.

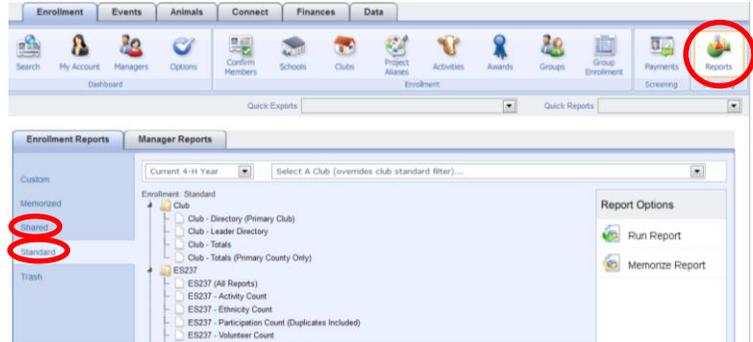
As a general rule, when choosing a report to run, first look for a Standard or Quick Report that contains the necessary information. If a Standard Report has the necessary information, but includes too much information, memorize the report to filter the information for a certain members. If there is not a Standard report available, check the list of Shared reports to see if another manager has already created a report with the needed information. If there is not a Shared Report listed with the necessary information, create a Custom Report.

Once reports are created, they remain in the user's reports list to run at any time. Reports are real-time and contain the most up-to-date information in the system at the time the user runs the report. Therefore, it is highly recommended to run the report each time the information is requested rather than saving the report to the computer and just printing it each time.

Family and Member mailing labels are automatically created with each Custom Report.

How to Run a Standard or Shared Report

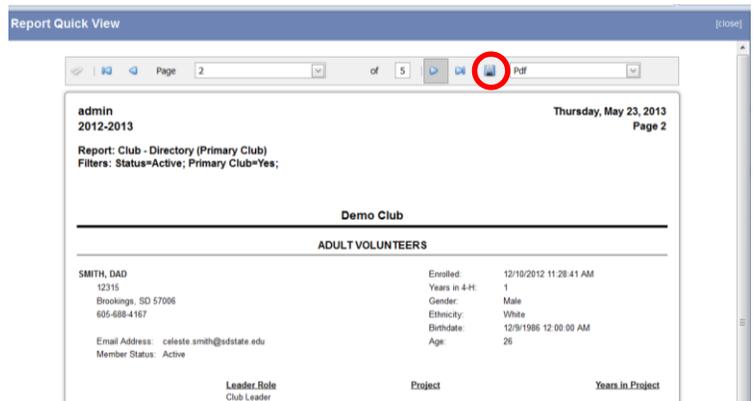
1. Click on the desired tab.
2. Click the “Reports” icon.
3. Select “Standard” or “Shared”



4. Select the desired report.
5. Click “Run Report.”



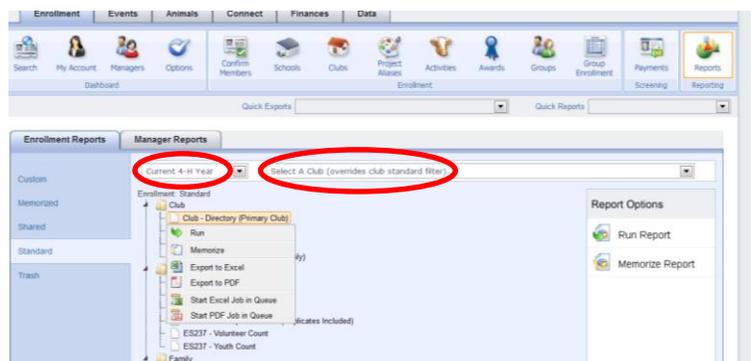
6. The report will open as a PDF document.
7. Click the save button to print the report.



STANDARD REPORT OPTIONS

Select the desired report and right-click on the title to see additional options for the selected report.

To run a report for only a specific club or for previous years, select the desired information from the drop-down boxes before running the report.



How to Memorize a Report

Memorized Reports are Standard or Shared reports to which a user applies additional filters in order to view more specific data.

1. Click on the desired tab.
2. Click the "Reports" icon.
3. Select "Standard" or "Shared"



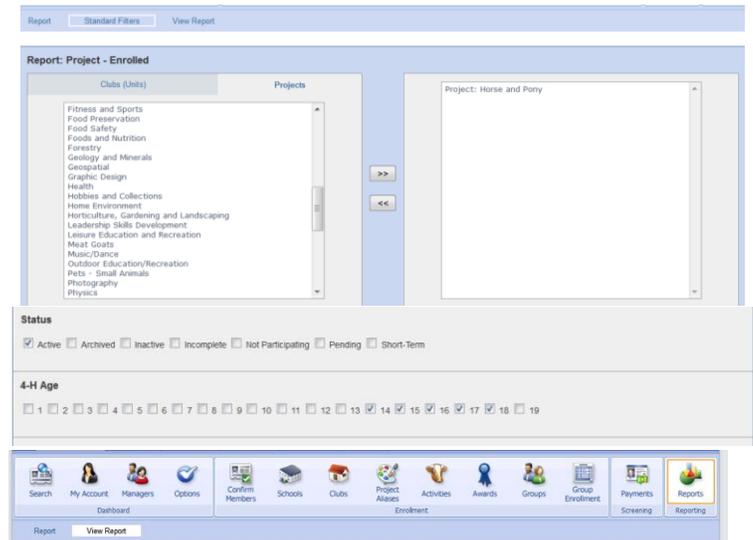
4. Select the desired report.
5. Click "Memorize Report" or right-click on the selected report and click "Memorize."



6. Enter the Memorized Report title.
7. Check "Share Club" if this report is intended for Club Leader use as well.
8. Click "Copy"

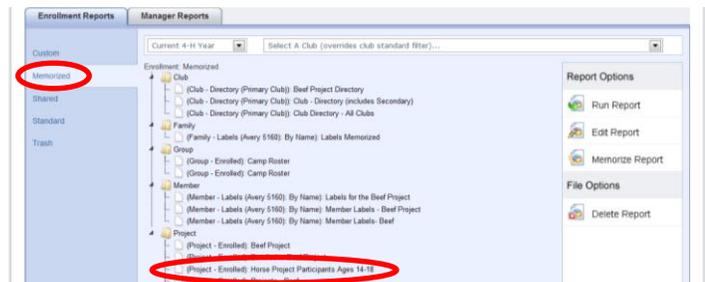


9. Select the desired additional filters.
10. Scroll to the bottom of the page and click "Save."



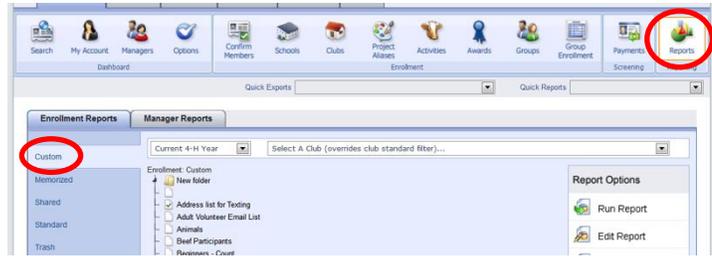
11. Click "View Report"

12. The new Memorized Report will now appear on the user's "Memorized" Reports list.

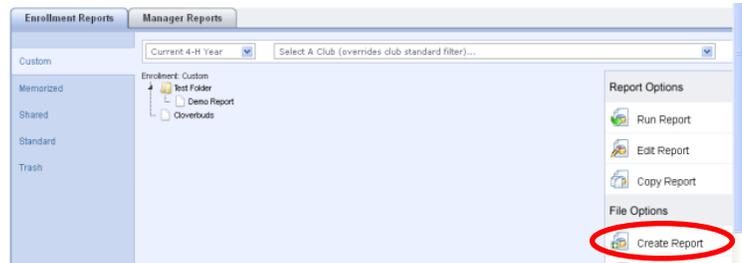


How to Create a Custom Report

1. Click on the “Reports” icon.
2. Select “Custom.”



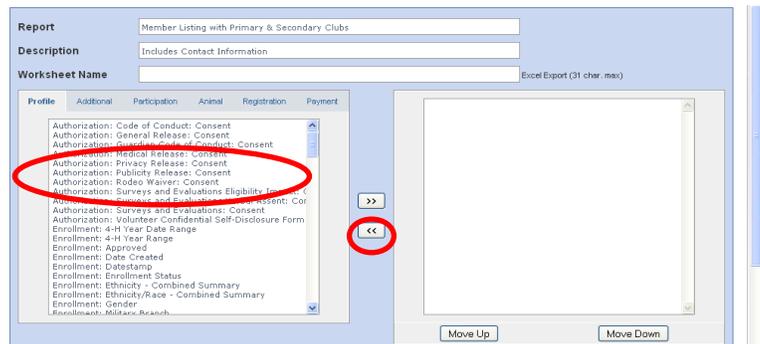
3. Click “Create Report.”



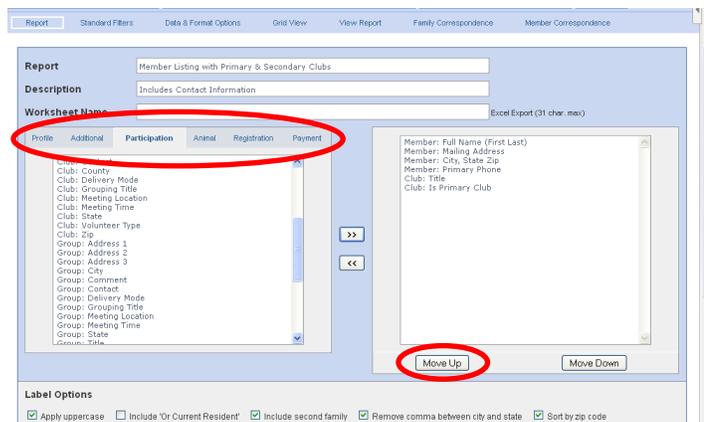
4. Enter the Title and Description of the report. Click “Share Club” to make the report accessible to Club Leaders.



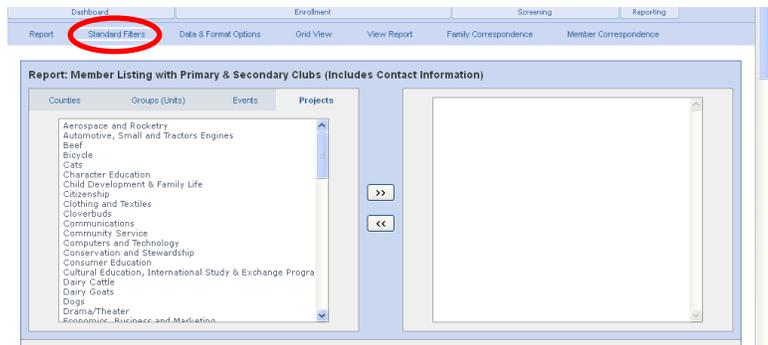
5. Select the desired fields to include in the report.
6. Click on the title, and then click the “Double Arrow” button to move it to the report.



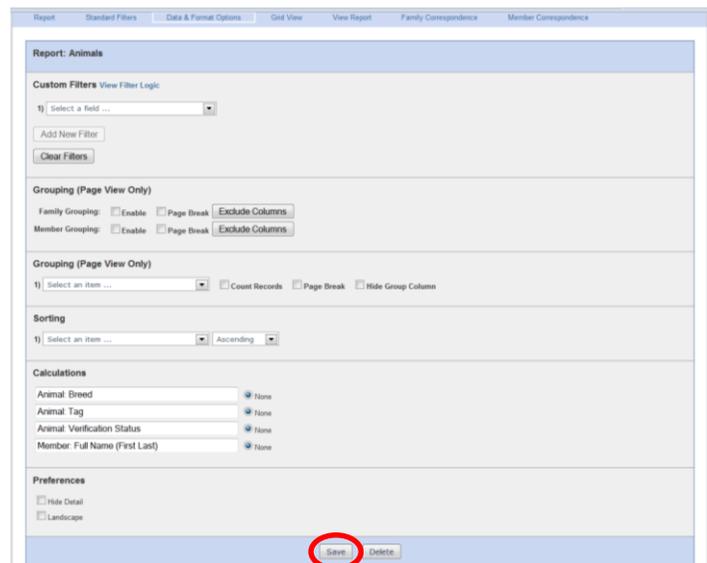
7. Each tab contains additional available fields to include on a report.
8. Fields listed from top to bottom in the reports box appear in the report from left to right. To move the item to a different position in the report, select the field and click move up or move down.
9. After all desired fields are listed on the report, scroll down to the bottom of the screen and click “Save.”



10. Click on “Standard Filters.”
11. This optional screen allows filters to be applied to the report in order to include only results that meet the specified criteria. Examples include: members enrolled in certain project area, members of a particular age, grade, gender, enrollment status, etc.
12. If there are members or families flagged (see [How to Flag Members or Families](#)) the user may apply a member or family flagged filter.
13. If no filters are selected, the report will include ALL members in the county.
14. Scroll down to the bottom and click “Save.”



15. The “Data & Format Options” screen provides additional options for filters and report design.
16. In addition to Custom Filters, the user may choose to group the report by Family or Member. Page breaks print one page per family or member.
17. Select a grouping to group the report by one of the fields on the report. Select Count Records, to view how many records are in each group.
18. Select a field from which to sort the report under Sorting.
19. Apply any calculations as needed.
20. If needed, choose to switch the page layout to landscape
21. Scroll down to the bottom and click “Save”.



22. Select “Grid View” to preview the report or export it to Excel



23. Select “View Report” to view the printable version of the report, or to save it in a different format.



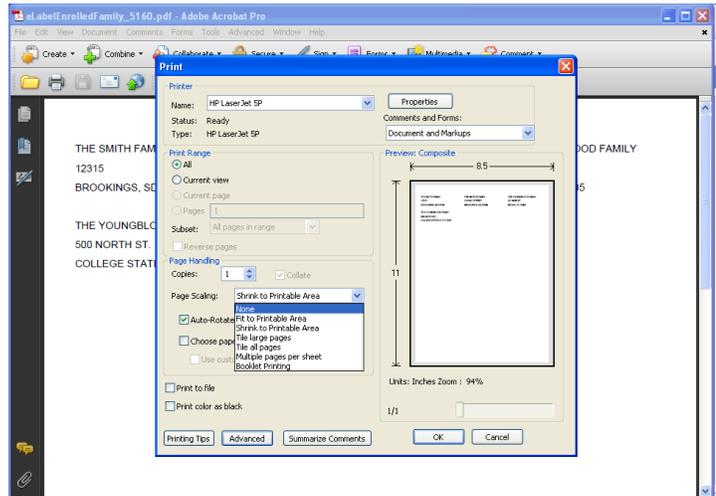
24. Select “Family Correspondence” to obtain mailing labels for all of the families included on the report, or “Member Correspondence” to obtain mailing labels for members included on the report.



25. To print labels, click the “Save” button.

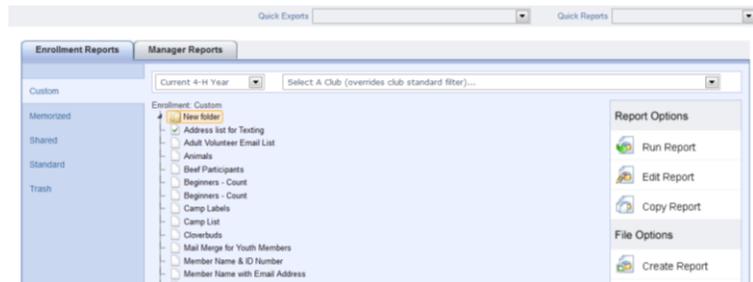


26. After the PDF opens, click on the Print button. Be sure to set the Page scaling at “None”.



27. The Custom report is listed in the “Custom” Reports list. The user may access or edit the report at any time.

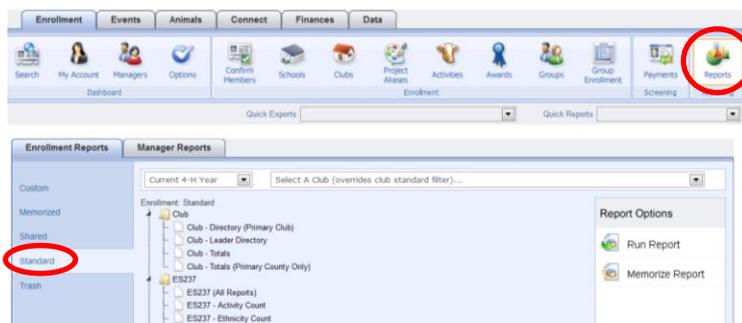
28. Right-click on the report title for quick options to print labels.



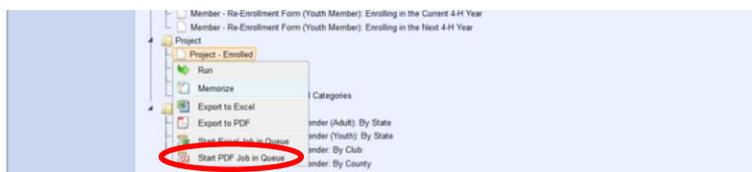
How to Run a Report in the Queue

If a report contains a large amount of data, it may take several seconds to populate. The user may choose to run the report in the queue in order to continue working on other tasks while the report populates.

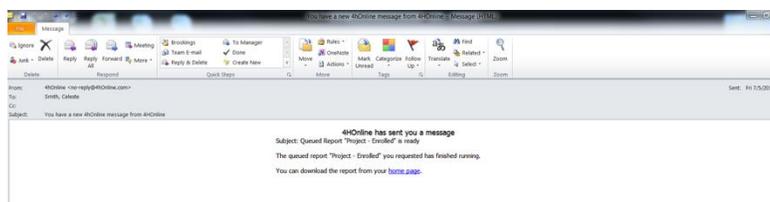
1. Click on the desired tab.
2. Click the "Reports" icon.
3. Select the desired report type.



4. Select the desired report.
5. Right-click on the selected report and click "Start Excel Job in Queue" or "Start PDF Job in Queue."



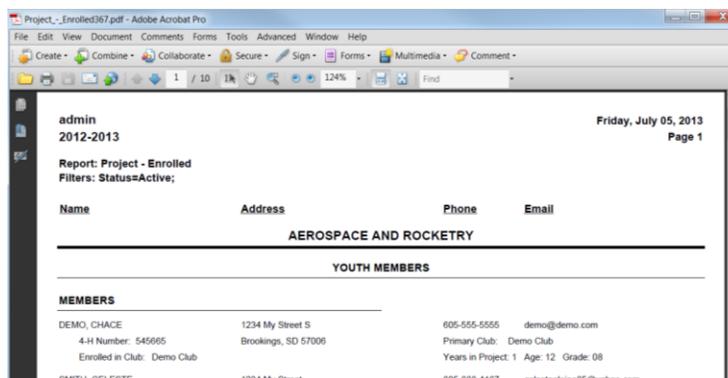
6. The program will run the report and send the user an email message when the report is ready to view.



7. To access the report, click on "Home."
8. Click on the report title view the report.



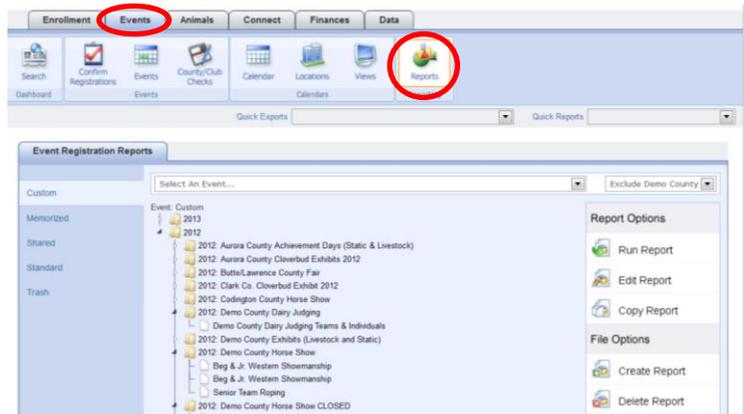
9. The report will open in the selected format (Excel or PDF).



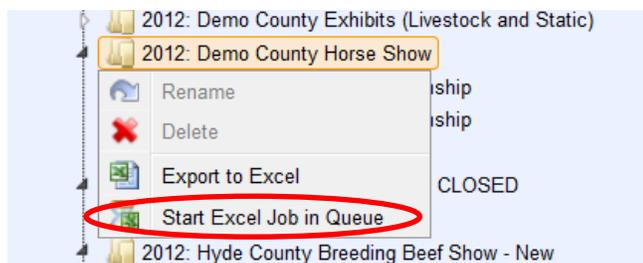
How to Run a Group of Reports

Often, especially for events, it is beneficial to run all reports located in a specific folder at once.

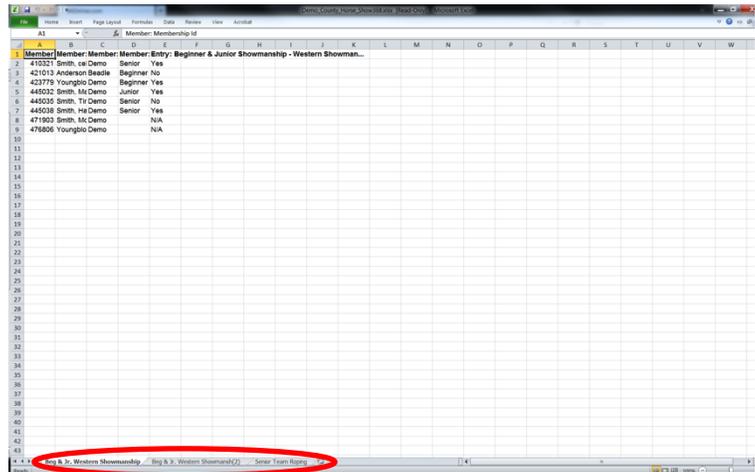
1. Click on the desired tab.
2. Click the "Reports" icon.
3. Select the desired report type.



4. Click on the folder containing the desired report.
5. Right-click on the folder and select "Export to Excel" or "Start Excel Job in Queue."

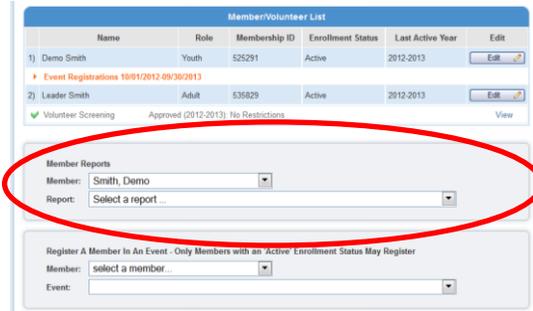


6. Each report in the selected folder appears in a separate Excel worksheet in the workbook.

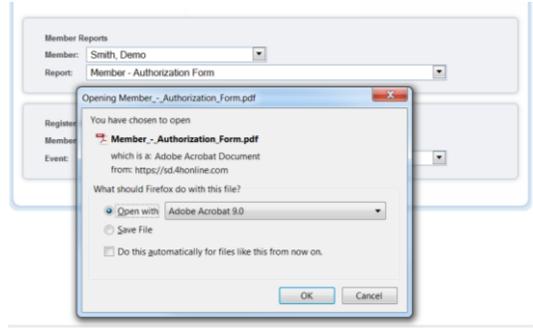


How to Run Member Reports

1. Login to a family account.
2. Scroll down to the "Member Reports" box on the "Member List" page.

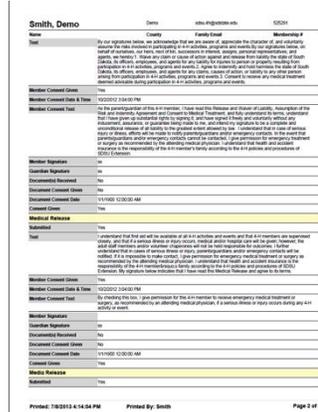


3. Select the Member's name and the desired report. The report pops-up in a .pdf document.
- NOTE: The internet pop-up blocker must be set to allow pop-ups from 4HOnline.

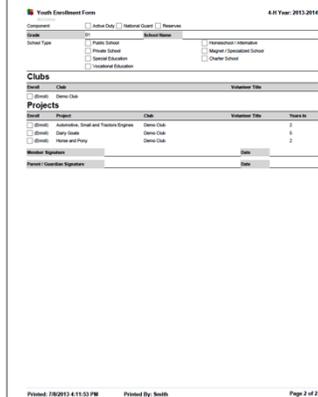


Member Report Descriptions and Samples

Member - Authorization Form: Printable version of the Authorization agreements signed at the time of enrollment (includes Code of Conduct, Media Release, Release and Waiver of Liability, etc).



Member - Re-Enrollment Form Next 4-H Year: Pre-filled re-enrollment form for the next 4-H year.



Member – Re-Enrollment Form Next 4-H Year: Pre-filled re-enrollment form for the current 4-H year.

4-H Year: 2013-2014

Smith, Demo

Name: Smith, Demo County: [] Family Email: [] Correspondence Pmt: []

Address: [] City: [] State: [] Zip Code: []

Phone: [] Cell Phone: []

Parent / Guardian 1

Name: [] Relationship: []

Parent / Guardian 2

Name: [] Relationship: []

Second Household

Best Correspondence: [] No [] Yes [] Correspondence Pmt: [] Print Mail [] Email []

Emergency Contact

Name: [] Phone: [] Relationship: []

Enrollment

Enroll: No Yes No (Please indicate both an ethnicity and race)

Race: White African American or Pacific Islander Black American Indian or Alaska Native Puerto Rico to State Hispanic or Latino Other

Residence: I have lived here since my arrival in this country I have lived here for less than 10 years I have lived here for more than 10 years

Military: No, I am not currently serving in the military I have a parent serving in the military I have a sibling serving in the military

Branch: Air Force Army Coast Guard DOD Outlier Marine Navy

Printed: 7/8/2013 4:18:27 PM Printed By: Smith Page 1 of 2

4-H Year: 2013-2014

Smith, Demo

Consent: Active Duty National Guard Reserve

Club: []

Project: []

Year In: []

Printed: 7/8/2013 4:18:27 PM Printed By: Smith Page 1 of 2

Member – Enrollment Form (Español): Member re-enrollment form for the current 4-H Year in Spanish.

4-H Year: 2013-2014

Smith, Demo

Nombre: Smith, Demo Departamento: [] Dirección de E-Mail: [] Preferencia de correspondencia: []

Carrera Electrónica: []

Apellido: [] Apellido: []

Código Postal: [] Estado: []

País: [] Teléfono: []

Padre / Tutor 1

Nombre: [] Apellido: []

Padre / Tutor 2

Nombre: [] Apellido: []

Segunda Unidad Familiar

Mejor correspondencia: [] No [] Sí [] Preferencia de correspondencia: [] Correo [] E-Mail []

Contacto de emergencia

Nombre / Apellido: [] Teléfono: []

Enrollment

Enroll: No Sí No (Por favor indique los dos étnicos y raza)

Raza: Blanca Hispanoamericano o Pacífico Negra Indígena o Altiplano Nativo Puerto Rico a los Estados Unidos Otro

Residencia: He vivido aquí desde mi llegada a este país He vivido aquí por menos de 10 años He vivido aquí por más de 10 años

Militar: No, no estoy sirviendo actualmente en el ejército Tengo un padre sirviendo en el ejército Tengo un hermano sirviendo en el ejército

Branch: Air Force Army Coast Guard DOD Outlier Marine Navy

Printed: 7/8/2013 4:18:28 PM Printed By: Smith Page 1 of 2

4-H Year: 2013-2014

Smith, Demo

Consent: Active Duty National Guard Reserve

Club: []

Project: []

Year In: []

Printed: 7/8/2013 4:18:28 PM Printed By: Smith Page 2 of 2

Member – Enrollment Form (New Adult Member): A basic enrollment form for New Adult members. This form does NOT include fields for the Volunteer Work Agreement. All new adult volunteers must also submit a [Volunteer Work Agreement](#).

4-H Year: 2013-2014

Smith, Demo

Name: [] County: [] Family Email: [] Correspondence Pmt: []

Address: [] City: [] State: [] Zip Code: []

Phone: [] Cell Phone: []

Enrollment

Enroll: No Yes No (Please indicate both an ethnicity and race)

Race: White African American or Pacific Islander Black American Indian or Alaska Native Puerto Rico to State Hispanic or Latino Other

Residence: I have lived here since my arrival in this country I have lived here for less than 10 years I have lived here for more than 10 years

Military: No, I am not currently serving in the military I have a parent serving in the military I have a sibling serving in the military

Branch: Air Force Army Coast Guard DOD Outlier Marine Navy

Consent: Active Duty National Guard Reserve

Clubs

Club: [] Volunteer Title: []

Projects

Project: [] Club: [] Volunteer Title: [] Year In: []

Printed: 7/8/2013 4:18:28 PM Printed By: Smith Page 1 of 1

Member – Enrollment Form (New Youth Member – Español): Blank youth enrollment form in Spanish.

This is a blank Spanish enrollment form for a new youth member. It includes sections for personal information, contact details for parents/guardians, household information, emergency contacts, and enrollment status. The form is titled 'Member - Enrollment Form (New Youth Member - Español)' and is dated 4-H Year: 2012-2013.

This is a second page of the blank Spanish enrollment form. It includes sections for 'Clubs' and 'Projects' with checkboxes for various options like 'Public School', 'Private School', 'Special Education', and 'Charter School'. It also includes fields for 'Member Signature' and 'Parent / Guardian Signature'. The form is titled 'Member - Enrollment Form (New Youth Member - Español)' and is dated 4-H Year: 2012-2013.

Member – Enrollment Form (New Youth Member) Enrolling in Current 4-H Year: Blank youth enrollment form dated for the Current 4-H Year.

This is a blank English enrollment form for a new youth member enrolling in the current year. It includes sections for personal information, contact details for parents/guardians, household information, emergency contacts, and enrollment status. The form is titled 'Youth Enrollment Form - New Member' and is dated 4-H Year: 2012-2013.

This is a second page of the blank English enrollment form. It includes sections for 'Clubs' and 'Projects' with checkboxes for various options like 'Public School', 'Private School', 'Special Education', and 'Charter School'. It also includes fields for 'Member Signature' and 'Parent / Guardian Signature'. The form is titled 'Youth Enrollment Form - New Member' and is dated 4-H Year: 2012-2013.

Member – Enrollment Form (New Youth Member) Enrolling in Next 4-H Year: Blank youth enrollment form dated for the Next 4-H Year.

This is a blank English enrollment form for a new youth member enrolling in the next year. It includes sections for personal information, contact details for parents/guardians, household information, emergency contacts, and enrollment status. The form is titled 'Youth Enrollment Form - New Member' and is dated 4-H Year: 2013-2014.

This is a second page of the blank English enrollment form. It includes sections for 'Clubs' and 'Projects' with checkboxes for various options like 'Public School', 'Private School', 'Special Education', and 'Charter School'. It also includes fields for 'Member Signature' and 'Parent / Guardian Signature'. The form is titled 'Youth Enrollment Form - New Member' and is dated 4-H Year: 2013-2014.

How to Add a New Youth Enrollment

1. Open a web browser and type in: www.4honline.org (Please note, adding the www. prefix will return an error message).

TIP: Any browser should work well with 4HOnline, but Firefox or Chrome work best.

2. If another immediate family member is already enrolled in _____ 4-H, log in to the family account and skip to Step 10.
3. If no immediate family members are enrolled in _____ 4-H, choose “I need to setup a profile.”
4. Enter the desired login information.
5. Click “Create Login.”
6. If a message appears stating that the account already exists, contact the County 4-H Office to obtain login information.

7. Enter the Family Information.
8. Click “Continue” to save the information.

9. Members in 4HOnline are categorized by Family. Add youth and adult family members who would like to enroll in 4-H.

NOTE: Only add Adults who would like to enroll as Volunteers. Parents who are not volunteers should not enroll as adults.

To view the County 4-H Office contact information, click the “Contact Info” link.

10. Under “Add a New Family Member,” select “Youth” and click “Add Member.”

11. Enter the member's Personal Information.
12. Information in **Bold** is required. All other information is optional.
13. Click "Continue."
14. Read the Additional Information carefully.
15. Mark the check box and/or sign each section. Please remember, by typing your name in these sections, you agree to allow the _____ 4-H Program to use your typed name as your legal electronic signature.
16. Click "Continue."
17. Complete the Health form.
18. If a Health Form does not appear, return to the Personal Information page and check the youth's birthdate. The Health Form will only appear for members ages 5 – 18 as of January 1 of the current program year.
19. Click "Continue."
20. In order to enroll in _____ 4-H, a member must be enrolled in at least one Club.
21. Independent members should enroll in the "Independent" Club in the County.
22. Cloverbuds may enroll in their local 4-H Club, but must also enroll in the Cloverbuds Group found under the Groups tab.
23. Select the desired Club.
24. Click "Add Club."
25. The Club will appear in your "Club List."
26. The member may enroll in as many clubs as they would like.
27. Be sure to select which Club will be the Primary Club.
28. When you have finished adding Clubs, click "Continue."
29. In order to enroll in _____ 4-H, each youth member must select a project.
30. Cloverbuds may only enroll in the "Cloverbuds" project.
31. Click "Add Project."
32. Youth may enroll in up to 50 projects.
33. Click "Continue."
34. Groups are optional. Cloverbuds should enroll in the Cloverbuds group.
35. Click "Submit Enrollment."
36. The member status will be Pending until the County Office approves the enrollment.

my typed name as my legal electronic signature.

How to Add a New Adult Volunteer Enrollment

For adult volunteers who have not enrolled in _____ 4-H before.

37. Open a web browser and type in: _____ (Please note, adding the www. prefix will return an error message).

TIP: Any browser should work well with 4HOnline, but Firefox or Chrome work best.

38. If another immediate family member is already enrolled in _____ 4-H, log in to the family account and skip to Step 10.

39. If no immediate family members are enrolled in _____ 4-H, choose “I need to setup a profile.”

40. Enter the desired login information.

41. Click “Create Login.”

42. If a message appears stating that the account already exists, contact the County 4-H Office to obtain login information.

43. Enter the Family Information.

44. Click “Continue” to save the information.

45. Members in 4HOnline are categorized by Family. Add youth and adult family members who would like to enroll in 4-H.

NOTE: Only add Adults who would like to enroll as Volunteers. Parents who are not volunteers should not enroll as adults.

To view the County 4-H Office contact information, click the “Contact Info” link.

Welcome to 4HOnline

Are you in a Military 4-H Club:

County: Demo Show County Contact Info.

Email: celeste.smith@sdstate.edu

Confirm Email: celeste.smith@sdstate.edu

Last Name: Smith

Password: •••••• Min. of 8 characters, at least 1 non-alpha

Confirm Password: ••••••

Role: Family

Create Login

Family Information

Profile Information

Email: celeste.smith@sdstate.edu jse@gmail.com

Last Name: Smith

Mailing Address: 1234 My Street

City: Brookings

State: South Dakota

Zip Code: 57006 12345

Primary Phone: 605-688-4167 555-555-1234

Correspondence Preference: Mail

4H County: Demo

Update member records with the same address:

Password Management

Current Password: ••••••

New Password: _____

Confirm New Password: _____

Update Password

Continue >>

Member List

Smith Family Edit Family

1234 My Street

Brookings, SD 57006

605-688-4167

celeste@sdstate.edu

Admin Count Contact Info

Add A New Family Member

select a member type...

select a member type...

Adult

Youth

select a member...

ReActivate Member

| Name | Role | Membership ID | Enrollment Status | Last Active Year | Edit |
|------|------|---------------|-------------------|------------------|------|
|------|------|---------------|-------------------|------------------|------|

46. Under “Add a New Family Member,” select “Adult” and click “Add Member.”

47. Enter the Adult’s Personal Information.

48. Information in **Bold** is required. All other information is optional.

NOTE: In order to receive text messages, enter a cell phone number and select a cell phone provider.

49. Answer “Yes” to “Are you a Volunteer?”

50. Click “Continue.”

51. Read the Additional Information carefully.

52. Mark the check box and/or sign each section. Please remember, by typing your name in these sections, you agree to allow the _____ 4-H Program to use your typed name as your legal electronic signature.

53. Click “Continue.”

54. Complete the Volunteer Screening form and click “Continue.”

55. If the Volunteer Screening page does not appear, return to the Personal Information page and be “Yes” is selected for “Are you a Volunteer?”

56. Click “Continue.”

57. Clubs, Projects and Groups are optional for Adult Volunteers.

58. Club Leaders should select and add a Club and Volunteer Type. Project Leaders should select and add a Project area and Volunteer Type.

59. If all information is complete and correct, click “Submit Enrollment.”

- 60. The Enrollment Status is Pending.
- 61. The County 4-H Office and the State 4-H Office will receive notification of the pending enrollment.

Member List

| | |
|--|---|
| Smith Family Edit Family 1234 My Street Brookings, SD 57006 605-688-4167 celesteelaine85@yahoo.com Admin County [contact info] | Add A New Family Member select a member type... <input type="button" value="Add Member"/> |
| | ReActivate An Archived Family Member select a member... <input type="button" value="ReActivate Member"/> |

| Member Volunteer List | | | | | | |
|-----------------------|---------------|-------|---------------|-------------------|------------------|-------------------------------------|
| | Name | Role | Membership ID | Enrollment Status | Last Active Year | Edit |
| 1) | Celeste Smith | Youth | | Pending | | <input type="button" value="Edit"/> |
| 2) | Celeste Smith | Adult | | Pending | | <input type="button" value="Edit"/> |

Volunteer Screening Pending (2011-2012):

How to Login to an Existing Family Account

1. Enter the email address on file and select "I forgot my password" if this is the first time logging in.

NOTE: If a new password is not needed, login, click "Continue to Family" and skip to step 10.

2. Select "Family" as the role.
3. Click "Send My Password." Do not close the internet window.
4. Check the email account on file for a message from 4HOnline with a temporary password.
5. From the 4HOnline login page, select "I have a profile."
6. Copy and Paste the temporary password from the email message to the login page.
7. Click "Login."
8. Follow the prompt to create a new password.
9. Click "Continue" to go to the family Member List.

10. The Member List lists all youth members and registered adult volunteers in the family who were enrolled in the _____ 4-H program for the previous program year.
11. Click "Edit" next to a member name to view or edit the member's information.
12. To update the entire family's contact information, see [How to Update Family Contact Information](#).

Welcome to 4hOnline

I have a profile
 I need to setup a profile
 I forgot my password

Email: celeste.smith@sdstate.edu

Role: Family

Send My Password

Welcome to 4hOnline

I have a profile
 I need to setup a profile
 I forgot my password

Email: celeste.smith@sdstate.edu

Password: ●●●●●●

Role: Family

Login

Please update your password

Password Management

New Password: ●●●●●●

Confirm New Password: ●●●●●●

Continue >>

Member List

Smith Family [Edit Family](#)

12315
Brookings, SD 57006
605-688-4167
celeste.smith@sdstate.edu
Admin County [\[contact info\]](#)

Add A New Family Member
select a member type...
Add Member

ReActivate An Archived Family Member
select a member...
ReActivate Member

| | Name | Role | Membership ID | Enrollment Status | Last Active Year | Edit |
|----|-------------------|-------|---------------|-------------------|------------------|----------------------|
| 1) | Junkyard Anderson | Youth | 415077 | Active | 2011-2012 | Edit |
| 2) | Tazz Anderson | Youth | 415042 | Active | 2011-2012 | Edit |
| 3) | celeste Smith | Youth | 410321 | Active | 2011-2012 | Edit |
| 4) | Ces Smith | Youth | 427163 | Active | 2011-2012 | Edit |
| 5) | ces123 Smith | Adult | | Pending | | Edit |

Volunteer Screenings Dashboard (2011-2012) View

How to Re-Enroll in 4-H

1. Enter the email address on file and select "I forgot my password" if this is the first time logging in.

NOTE: If a new password is not needed, login, click "Continue to Family" and skip to step 10.

2. Select "Family" as the role.
3. Click "Send My Password." Do not close the internet window.

4. Check the email account on file for a message from 4HOnline with a temporary password.
5. From the 4HOnline login page, select "I have a profile."
6. Copy and Paste the temporary password from the email message to the login page.
7. Click "Login."

8. Follow the prompt to create a new password.
9. Click "Continue" to go to the family Member List.

10. The Member List lists all youth members and registered adult volunteers in the family who were enrolled in the _____ 4-H program for the previous program year.
11. Click "Edit" next to a member name to re-enroll for the current program year.
12. To update the entire family's contact information, see [How to Update Family Contact Information](#).

13. Scroll to the bottom of the record review page and click "Enroll for [Current Program Year]."

Welcome to 4hOnline

I have a profile
 I need to setup a profile
 I forgot my password

Email: celeste.smith@sdstate.edu

Role: Family

Send My Password

Welcome to 4hOnline

I have a profile
 I need to setup a profile
 I forgot my password

Email: celeste.smith@sdstate.edu

Password: ●●●●●●

Role: Family

Login

Please update your password

Password Management

New Password: ●●●●●●

Confirm New Password: ●●●●●●

Continue >>

Member List

Smith Family [Edit Family](#)

12315
Brookings, SD 57006
605-688-4167
celeste.smith@sdstate.edu
Admin County [contact info](#)

Add A New Family Member
select a member type...
[Add Member](#)

ReActivate An Archived Family Member
select a member...
[ReActivate Member](#)

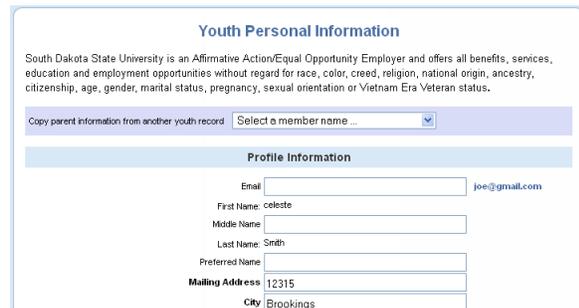
| | Name | Role | Membership ID | Enrollment Status | Last Active Year | Edit |
|----|-------------------|-------|---------------|-------------------|------------------|----------------------|
| 1) | Junkyard Anderson | Youth | 415077 | Active | 2011-2012 | Edit |
| 2) | Tazz Anderson | Youth | 415042 | Active | 2011-2012 | Edit |
| 3) | celeste Smith | Youth | 410321 | Active | 2011-2012 | Edit |
| 4) | Ces Smith | Youth | 427153 | Active | 2011-2012 | Edit |
| 5) | ces123 Smith | Adult | | Pending | | Edit |

Unlabeled: ScreenShot Download (2011-2012) View

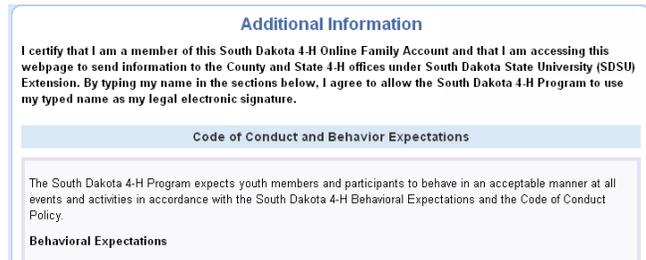
Emergency Contact Relationship: 468
4-H County: DeMo
Second 4-H County:

Enroll for 2012-2013

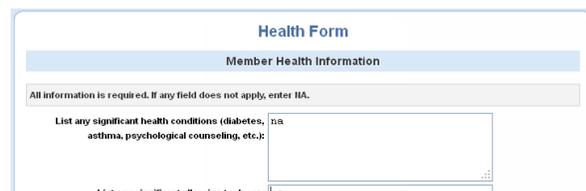
14. Update any personal information.
15. Click “Continue” at the bottom of the page to save changes.
16. Contact the County 4-H Office to make any changes to the Name, Birthdate or Years in 4-H.



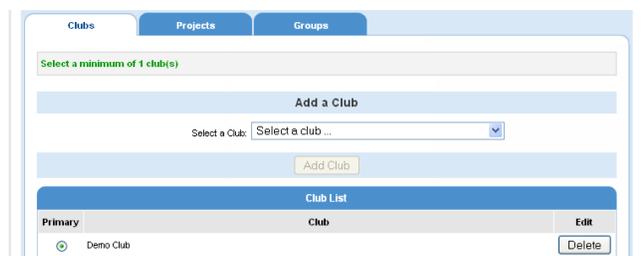
17. Read the Additional Information text, check the appropriate check box and enter the electronic signature.
18. Click “Continue” to save changes and access the member Health Form.



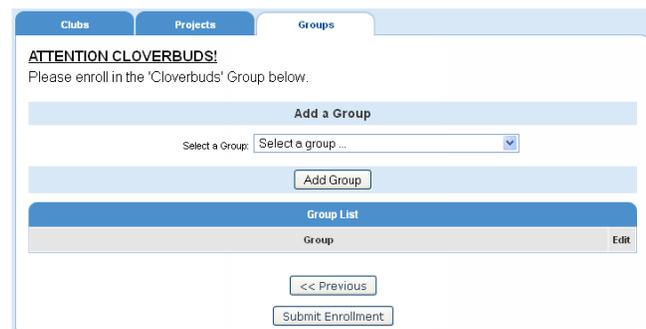
19. It is very important that each member’s Health Form is complete and accurate. Enter the member’s Health information and click “Continue.”



20. Review and edit the member’s clubs, projects and groups.
NOTE: Cloverbuds may enroll in a local 4-H Club, but must also enroll in the Cloverbuds Group found under the Groups tab.
21. Click “Continue.”



22. When all information is correct and complete, click “Submit Enrollment.”
23. The County office will receive notification of the pending enrollment.
24. The user will receive email notification when the County has reviewed and accepted the enrollment.



TIPS:

After the initial login, the Family Home Page will appear upon login.

County 4-H Offices may upload Announcements and Newsletters available for families to view on the Home Page.

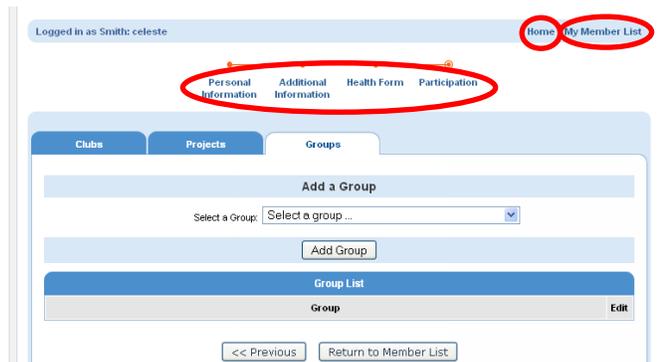
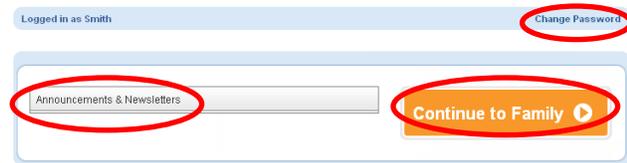
To access the member list, the click “Continue to Family.”

To change the password at any time after initial login, click “Change Password.”

Click “Home” at any point in the program to return to the Home page.

Click “My Member List” to return to the member list.

For quick navigation among the four member enrollment pages, click the page title under the navigation bar.

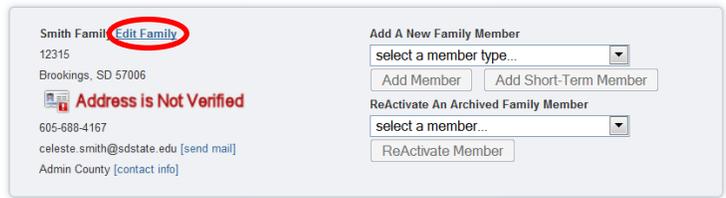


How to Update Family Contact Information

1. Log in to a Family account.
2. Click “Continue to Family.”



3. From the “Member List,” click “Edit Family.”



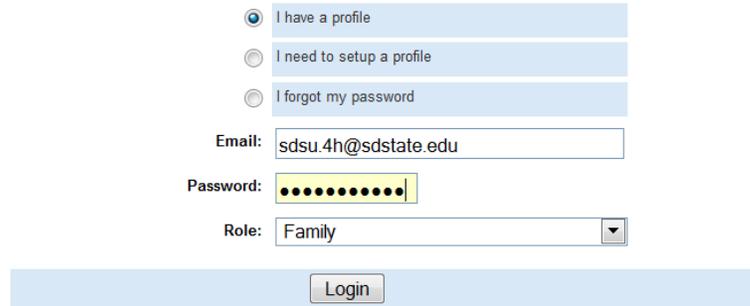
4. Update the family’s contact information.
5. If this change affects all of the members in the family, check “Update member records with the same address.”
6. Click “Continue.”
NOTE: Because a member often has a different email address from the family, the member email address does not update when “Update member records with the same address” is checked.
7. Contact the County office to change the 4-H County.



Reports for Families

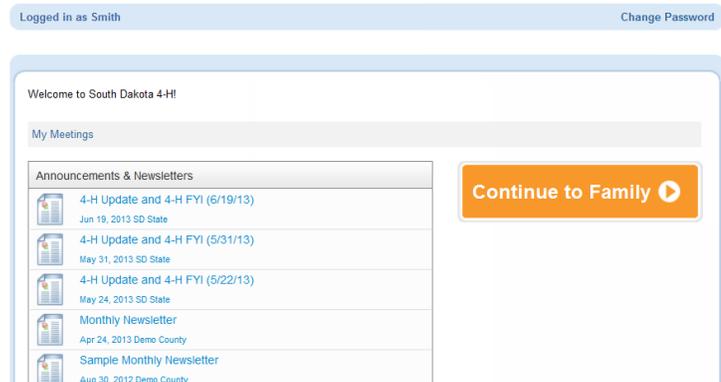
How to Run Member Reports - Families

1. Log in to a Family account in 4HOnline.



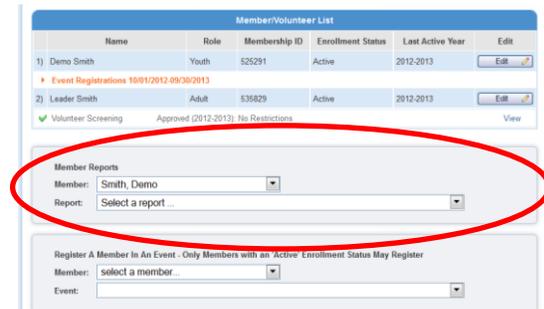
The login form includes three radio buttons for user status: "I have a profile" (selected), "I need to setup a profile", and "I forgot my password". Below these are input fields for "Email" (sdsu.4h@sdstate.edu), "Password" (masked with dots), and "Role" (Family). A "Login" button is at the bottom.

2. Click "Continue to Family."



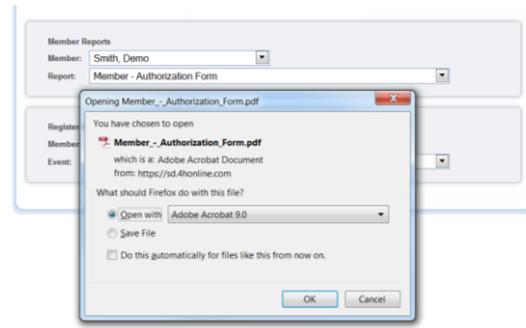
The dashboard shows "Logged in as Smith" and a "Change Password" link. A "Continue to Family" button is highlighted in orange. Below it is a "My Meetings" section and an "Announcements & Newsletters" list with items like "4-H Update and 4-H FYI (6/19/13)".

3. Scroll down to the "Member Reports" box on the "Member List" page.



The "Member/Volunteer List" table shows members like "Demo Smith" and "Leader Smith". Below the table is a "Member Reports" section with a dropdown for "Member" (Smith, Demo) and a "Report" dropdown (Select a report...). A red oval highlights this section.

4. Select the Member's name and the desired report. The report will pop-up in a .pdf document.
NOTE: The internet pop-up blocker must be set to allow pop-ups from 4HOnline.



A dialog box titled "Opening Member_-_Authorization_Form.pdf" is shown over the "Member Reports" section. It asks "What should Firefox do with this file?" and has options for "Open with Adobe Acrobat 9.0", "Save File", and "Do this automatically for files like this from now on".

Member – Enrollment Form (New Youth Member) Enrolling in Current 4-H Year: Blank youth enrollment form dated for the Current 4-H Year.

Youth Enrollment Form - New Member 4-H Year: 2012-2013

Name: [Redacted] County: [Redacted] Family Email: [Redacted] Correspondence Ph#: [Redacted]

Grade: [Redacted] School Name: [Redacted]

Gender Type: Public School Homeschool / Alternative Private School Magnet / Specialized School Special Education Charter School Vocational Education

Clubs: [Redacted] Club: [Redacted] Volunteer Title: [Redacted]

Projects: [Redacted] Club: [Redacted] Volunteer Title: [Redacted] Years In: [Redacted]

Member Signature: [Redacted] Date: [Redacted]

Parent / Guardian Signature: [Redacted] Date: [Redacted]

Printed: 7/8/2013 4:26:10 PM Printed By: Smith Page 1 of 2

Youth Enrollment Form - New Member 4-H Year: 2012-2013

Name: [Redacted] County: [Redacted] Family Email: [Redacted] Correspondence Ph#: [Redacted]

Grade: [Redacted] School Name: [Redacted]

Gender Type: Public School Homeschool / Alternative Private School Magnet / Specialized School Special Education Charter School Vocational Education

Clubs: [Redacted] Club: [Redacted] Volunteer Title: [Redacted]

Projects: [Redacted] Club: [Redacted] Volunteer Title: [Redacted] Years In: [Redacted]

Member Signature: [Redacted] Date: [Redacted]

Parent / Guardian Signature: [Redacted] Date: [Redacted]

Printed: 7/8/2013 4:26:10 PM Printed By: Smith Page 1 of 2

Member – Enrollment Form (New Youth Member) Enrolling in Next 4-H Year: Blank youth enrollment form dated for the Next 4-H Year.

Youth Enrollment Form - New Member 4-H Year: 2013-2014

Name: [Redacted] County: [Redacted] Family Email: [Redacted] Correspondence Ph#: [Redacted]

Grade: [Redacted] School Name: [Redacted]

Gender Type: Public School Homeschool / Alternative Private School Magnet / Specialized School Special Education Charter School Vocational Education

Clubs: [Redacted] Club: [Redacted] Volunteer Title: [Redacted]

Projects: [Redacted] Club: [Redacted] Volunteer Title: [Redacted] Years In: [Redacted]

Member Signature: [Redacted] Date: [Redacted]

Parent / Guardian Signature: [Redacted] Date: [Redacted]

Printed: 7/8/2013 4:28:08 PM Printed By: Smith Page 1 of 2

Youth Enrollment Form - New Member 4-H Year: 2013-2014

Name: [Redacted] County: [Redacted] Family Email: [Redacted] Correspondence Ph#: [Redacted]

Grade: [Redacted] School Name: [Redacted]

Gender Type: Public School Homeschool / Alternative Private School Magnet / Specialized School Special Education Charter School Vocational Education

Clubs: [Redacted] Club: [Redacted] Volunteer Title: [Redacted]

Projects: [Redacted] Club: [Redacted] Volunteer Title: [Redacted] Years In: [Redacted]

Member Signature: [Redacted] Date: [Redacted]

Parent / Guardian Signature: [Redacted] Date: [Redacted]

Printed: 7/8/2013 4:28:08 PM Printed By: Smith Page 2 of 2

Member Enrollment History: A Report of the current enrollment information as well as the Clubs, Projects, Activities, Awards and Groups on the member's record from each year the member has enrolled through 4HOnline.

Member - Enrollment History 4-H Year: 2012-2013

Smith, Demo (Youth) - Demo
14-Aug-11 Native Area: Membership # 8-5204

Email: [Redacted] First Name: Demo Last Name: Demo
Middle Name: [Redacted] Last Name: Smith
Professional Name: [Redacted] Mailing Address: 12345 My Street
City: Brookings State: SD
ZIP Code: 57007 Birth Date: 10/04/2001
Gender: Female Primary Phone: 605-555-5555
Cell Phone: 605-555-5555 Work Phone: 605-488-4107

Years in 4-H: 2 Parent 1 First Name: [Redacted] Parent 1 Cell Phone: [Redacted]
Parent 1 Work Phone: [Redacted] Parent 1 Work Extension: [Redacted]
Parent 2 First Name: [Redacted] Parent 2 Cell Name: [Redacted]
Parent 2 Cell Phone: [Redacted] Parent 2 Work Phone: [Redacted]
Parent 2 Work Extension: [Redacted] Parent 2 Address: [Redacted]
Parent 2 City: [Redacted] Parent 2 State: SD
Parent 2 Zip Code: [Redacted] Parent 2 Home Phone: [Redacted]

Second Household: No Second Household Correspondence Ph#: [Redacted] Mail
Second Household Family Name: [Redacted] Second Household First Name: [Redacted]
Second Household Primary Phone: [Redacted] Second Household Address: [Redacted]
Second Household City: [Redacted] Second Household State: SD
Second Household Zip Code: [Redacted] Second Household Email: [Redacted]

Emergency Contact Name: Mom Emergency Contact Phone: 605-555-5555
Emergency Contact Email: [Redacted] Emergency Contact Relationship: [Redacted]

Clubs: [Redacted] Club: [Redacted] Volunteer Title: [Redacted]

Projects: [Redacted] Club: [Redacted] Volunteer Title: [Redacted] Years In: [Redacted]

Activities: [Redacted] Project: [Redacted] Volunteer Title: [Redacted]

Awards: [Redacted] Award: [Redacted] Activity: [Redacted]

Printed: 7/8/2013 4:27:33 PM Printed By: Smith Page 1 of 2

Groups

| 4-H Year | Group | Volunteer Title |
|-----------|-------------------|-----------------|
| 2012-2013 | Suburban Training | |

Printed: 7/8/2013 4:27:33 PM Printed By: Smith Page 2 of 2



4HOnline Quick Resources

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| 4HOnline Trouble Shooting Guide | |
| FAQ..... | |
| 4-H Delivery Mode Descriptions | |
| Glossary of 4HOnline Terms | |

4HOnline Trouble Shooting Guide

Here is a quick guide to common issues with simple fixes in 4HOnline.

Problem: The Clubs for a different County or no Clubs come up when I try to enter my member's Clubs.

Solution: Check the member's County of enrollment. The user may have accidentally selected the wrong County. If the user's County is not selected, the user's Clubs will not appear.

Problem: The Member Health Form does not come up for my member.

Solution: Check the member's birthdate. Health forms are set to appear for members ages 5 – 18 as of January 1. If the youth member turned 5 after January 1, he or she is not eligible to enroll in 4-H or Cloverbuds.

Problem: My member or family list does not show all of my members/families.

Solution: Check the youth/member "Search" box. Click "Clear Filters" and then click "Search." All of the member records should now appear.

Problem: I started entering a member and was not able to complete his/her enrollment. I cannot find the incomplete record.

Solution: Look for the family under the "Families" tab. When the family account appears, click on "Login" to complete the member enrollment.

Problem: I have a Cloverbud who is 8 years old. I cannot find the Cloverbuds project for this member.

Solution: If the member turned 8 prior to January 1, he or she is no longer eligible for Cloverbuds and must enroll as a beginner 4-H member.

Problem: One of my Families does not show up in the Family list, but the members in the family show up on the Members list.

Solution: Log in to one of the family member accounts. From the "Member List", click "Edit Family". Check the 4-H County that the family is enrolled in. The County may have been entered incorrectly. This is also a solution if a member does not show up on the list of members and his/her family does show up on the list of Families. Login to the Family and then edit the member. Check the member's 4-H County.

Problem: A member's primary county has marked my county as the member's Second 4-H County, but I cannot see their record.

Solution: Chances are the user's filters are set on the member/volunteer search screen to only return members who are in the user's county. Click "Clear Filters" and search for the member again.

Problem: One of my member's is moving to a different County. How can I transfer their record?

Solution: Log in to the member's family, click "Edit Family" and change the 4-H County to the new County. Click "Continue" to save the change. The new county will receive a message that a family has moved to their county.

FAQ

General Questions

What should I do if I cannot find my password?

Contact the State 4-H Office for a new temporary password or use the “I forgot my password” option on the login page.

I am in charge of more than one County. How do I manage 4HOnline for all of my Counties?

If the user’s Counties operate separate 4-H programs, 4HOnline sets up a “District” account for the user to access all of the Counties under that user’s jurisdiction from one place. The user will be able to run reports for each County individually as well as for the entire “District.”

If the user’s Counties operate one combined 4-H program from one County office, they are combined as one County in 4HOnline.

Member Enrollments:

Who should I list as an emergency contact on the youth enrollment? Does it have to be someone other than a parent?

The emergency contact should match the original paper enrollment form. It is preferable that the emergency contact is not a parent already listed on the form.

How do I enroll independent members?

Each County should have an “Independent” Club. Simply enroll a member in that Club. The delivery mode for Independent Clubs is set to “4-H Individual Study/Mentoring/Family Learning Program.” If the County account does not have an Independent Club listed, contact the State 4-H Office to create one.

How do I enroll Cloverbuds?

Cloverbuds should enroll in the local club in which they participate. They should also enroll in the “Cloverbuds” Group under the Groups tab.

The ONLY project Cloverbuds are allowed to enroll in is the “Cloverbuds” project.

How do I count Cloverbuds “Years in 4-H”?

Cloverbuds are not technically 4-H Members. Once they become a beginner 4-H member, the County manager should change their years in 4-H back to 1.

What “grade level” do I use for Cloverbuds who are in pre-school?

In order to keep the youth/member reports accurate, please enter that they are “not in school.”

What do I do if a youth member’s Health Information is incomplete?

If possible, contact the family for correct and complete health information. If the family does not have an insurance policy number and/or does not know a date for the last Tetanus shot, enter “unknown/not provided” in the field. If the user enter that it was “not provided,” the user will know that this is not something the user missed when the user entered the information. Some type of text entry is required in this field in order to submit the enrollment.

Can a member be enrolled in more than one Club in our County?

Yes — members may enroll in as many Clubs in a County as they would like.

Does a member have to enroll in a project?

Yes — each 4-H member must be enrolled in at least one Club and one project.

I do not see Self-Determined in the project list, how do I add a Self-Determined project?

We were not able to add Self-Determined as a project area because it does not correspond with a National Category (which in turn corresponds with an ES237 Category). It is best to ask the member for a description of the project and find the project area that best matches the description. In most cases, it will relate to an existing project area. If there are questions regarding where to put a specific Self-Determined project, contact the State 4-H Office.

Some of my families do not have email addresses. What do I do?

An email address is not required when a County enters a member enrollment. It is only a required field if the family is entering the enrollment. Please leave this field blank. DO NOT enter a “fake” email address as it may turn out that it belongs to someone. 😊

Clubs

Some of my Clubs are no longer active. How do I remove them from my list of Clubs?

Contact the State 4-H Office with the Club’s name and whether the Club’s status should be “Closed” or “Inactive.” “Closed” means that the Club is no longer in existence and will more than likely never reopen. If a Club is closed temporarily, possibly due to low membership, it is considered “Inactive.”

A new club started in our county. How do I add it to the Clubs list?

Be sure the Club has completed the Charter requirements. Send the new Club Charter Application packet to the State 4-H Office. Contact the State 4-H Office with the Club name and delivery mode. The State 4-H Office will add the Club to the County account.

Schools:

There are schools on my school list that should not be there. How do I take them off?

Click on the Schools button from the Enrollment tab. This will bring up a list of schools in the County. Find the school to delete. Click on the “Edit” button next to the school and select “Delete”.

How do I add home schools?

When the user enters the member enrollment for a home schooled student, select the radio button for “If you are unable to locate your school...” Enter the family’s last name and then the word Homeschool as the School Name (e.g., Smith Homeschool). Select Homeschool/Alternative as the School Type.

4HOnline Capabilities:

How does this system work in places where there is no Internet access such as our County fairgrounds?

4HOnline is a web-based system; this means the user must have internet access to log in to the site. The State 4-H Office has internet air cards available for check-out for 4-H events at which internet access is necessary.

Tips:

When the user enters a “Search” term in the search screen, only the records matching the search credentials appear in the results. Please note: the “Search” box does not clear after the user navigates away from the page or logs off. When the user goes back to the search screen in an active session or logs in to a new session, the results of the last search will remain on the search screen. It is good idea to always clear the “Search” box after the desired information is found.

4-H Delivery Mode Descriptions

Organized 4-H Clubs (Community, In-School, After-school and Military): A 4-H Club is an organized group of the youth, led by an adult, with a planned program that is carried on throughout all or most of the year. 4-H clubs may meet in any location and typically have elected officers and a set of rules approved by the membership to govern the club, or for very young groups, other developmentally appropriate structures and operating processes. Includes the following:

- **Community clubs** typically meet in the evenings or on weekends and offer self-chosen multiple learning experiences and activities.
- **In-school clubs** meet during school hours, but have officers and planned activities beyond school enrichment.
- **4-H after-school clubs** are organized within after-school programs administered by Cooperative Extension staff or other organizations (i.e. other the youth development organizations, housing authorities, faith-based groups. They set the above definition of a 4-H Club and the the userng people and adult staff identify themselves as 4-H members and volunteers. They may have officers and elements of a club structure.
- **Military 4-H clubs** are organized by the Armed Forces, often on military installations, and principally for military dependents.

Special-Interest and Short-Term Programs: Groups of the youth meeting for a specific learning experience that involves direct teaching by extension staff or trained volunteers, including teachers. Program is not part of school curriculum and not restricted to members of 4-H clubs. Multiple-day meetings, for example on college campuses, should be reported as short-term programs. The direct audience contact hours should be at least six for enrollment to be reported.

Overnight Camping Programs: The youth taking part in an Extension-planned educational experience of group living in the out-of-doors. Overnight camping includes being away from home at least one night (resident, primitive, or travel camping) and is not restricted to members of organized 4-H clubs.

Day Camping Programs: The youth taking part in an Extension-planned educational experience of group living in the out-of-doors. Day camping consists of multiple-day programs, with the youth returning home each evening.

School Enrichment Programs: Groups of the youth receiving a sequence of learning experiences in cooperation with school officials during school hours to support the school curriculum. Involves direct teaching by extension staff or trained volunteers, including teachers.

Individual Learning/Mentoring/Family Learning Programs: Planned learning that occurs independently of a formal group setting, such as a club, as an individual, paired, or family learning effort. Self directed, usually with limited adult involvement except for parents (or mentor). Examples include self-study, home study courses, advanced placement courses, mentoring or shadowing with an "expert," whole families learning together.

School-Aged Child Care Education: After-School educational programs offered to the youth outside of school hours, usually in a school or other community center. The after-school program must be supported by Extension by training the after-school staff, infusing 4-H curricula into the program, and/or other significant support such as conducting needs assessments, evaluations, and/or resource development. The primary purpose of the program is to provide care, developmental and educational experiences for children and the youth while parents are working or unavailable. As general guidance, facilities or settings should operate approximately 3 days per week and two hours per day (e.g. six hours per week) for about five months of the academic year or three days per week for six hours per day (e.g. 18 hours per week) and/or for at least eight weeks in the summer. The children and the youth in these programs should be enrolled as 4-H members in the county program, have the benefits of all 4-H programs and activities, and identify themselves as 4-H members. (4-H clubs in after-school settings should be reported under Organized 4-H After School Clubs.)

TV/Video/Web Programs: The youth offered learning experiences through Extension via broadcast or closed circuit television, including satellite transmission, or videotape replays of such series. May also include instruction delivered by internet.

Source: <http://www.ext.colostate.edu/ye/forms/definitions.pdf>

Glossary of 4HOnline Terms

4-H Age: A member's age calculated as of midnight on January 1 of the current program year instead of by his or her actual birthdate.

Active: The status of a member who has completed all of the steps required for enrollment

Activity: Any activity in which a member participates that should be part of the enrollment record. Information regarding activities is not reported on the ES237

Adult: A registered adult volunteer

Archived: A member who was active at one time, but is not participating this year

Authorizations: Legal agreements (usually on an enrollment or registration form) that require a parent or member signature

Beginner: A 4-H member who is 8, 9, or 10 years old

Browser: the program utilized to access the internet (Explorer, Firefox, Chrome)

Cloverbud: A 4-H participant who is 5, 6 or 7 years old

Club Leader: An adult volunteer responsible for a local 4-H club

Contact: A non-4-H member associated with 4-H in some way. Contacts can include board members, committee members, donors, etc.

Continue: Saves the information on the current screen and moves to the next screen. Often synonymous with "Save"

Custom Report: A report created by the manager. After its creation, a custom report is available to view and/or print at any time

Deadline: 11:59 p.m. CT on the date of the deadline

Delete and Block: Delete a member's event registration and block them from ever registering for the event

Delivery Mode: a classification for the various types of 4-H Clubs or areas of involvement

Duplicate: A member or family profile that has been created in 4HOnline more than once

ES237: The Federal report required from each state used to report 4-H activities to the Cooperative Extension Service (CES) personnel at the Department of Agriculture (USDA) in Washington, D.C. This data is reported on form 237 and is designated ES-237

Family Correspondence: Mailing labels created for each family represented on a given report

Filter: A way to break large sets of data into smaller sets

Flag: The check box located next to the member name on the Member/Volunteer screen under the enrollment tab

Group Enrollment: A brief report of a 4-H or SDSU Extension activity that indicates the race, ethnicity and gender of the participants. Used for ES237 and Civil Rights reporting requirements

Group: Any group of people that the user would like to keep track of together. These could be camps, classes, committees, etc. Information regarding groups can be used to create a group enrollment in order to be reported on the ES237

Help Sheet: a quick reference that describes how to perform a specific task in 4HOnline

InActive: A member who was active at one time, but has not re-enrolled for the current program year

Incomplete: Member has started the enrollment/registration process, but has not submitted it to the County for approval

Invoice: an invoice printed at the family level and sent with a payment to the County 4-H Office

Junior: A 4-H member who is 11, 12 or 13 years old

Login-Only: a level of access granted to a Club Leader in which the leader may only view member enrollment information, but may not edit the information

Manager: A State or County employee using 4HOnline as a state or county administrator

Member Correspondence: Mailing labels created for each member represented on a given report

Member ID: An ID number unique to each member enrolled through 4HOnline in _____

Member List: The page in a family account that lists all of the family members registered in 4HOnline

Member Management: a level of access granted to a club leader in which the leader may edit existing member enrollment records, add new member enrollment records and/or register members for events

Membership ID: An ID number unique to each member enrolled through 4HOnline in the United States; often used for livestock backtags.

Memorized Report: A Standard, Custom or Shared report with additional filters

National Category: Categories to which each project area corresponds

Pending: Members have submitted their enrollment information, but need to be confirmed at the County and/or State level

Primary Club: a club in which a member participates most often

Project Alias: A project name used in a County that differs from the name used at the State level

Project Completion Deadline: The last day on which a member may add or change the projects in which he or she is enrolled. The State 4-H project selection deadline is May 31 of the current program year for anyone wishing to participate in summer State 4-H contests

Project Leader: An adult volunteer responsible for certain project area vs. a specific club

Project: a specific area of study or concentration for the 4-H program year

Queue: The ability to run a report in the background of the computer allowing the user to continue working on other tasks while the program compiles the report; often useful for reports that will return large amounts of data

Quick Export: A standard report that will pop up as an excel file when the user clicks the title of the report in the drop-down list at the top of the screen. Be sure pop-up blockers are turned off to run Quick Exports

Quick Report: A standard report that will pop up as a .pdf file when the user clicks on the title of the report in the drop-down list at the top right of the screen. Be sure pop-up blockers are turned off to run Quick Reports.

Records Returned: the number of member records found as a result of a search

Re-enrollment: when an existing member enrolls for the next program year

Roll-over: the end of one program year and the beginning of the next. In 4HOnline this means that all active members become inactive and all grade levels, years in 4-H and years in projects advance one year. For Nebraska, this happens at 11:59 p.m. CT on September 30

Screening Payment: The volunteer enrollment fee

Second 4-H County: a county, outside the member's home county, in which the member participates; often in a single project area

Secondary Club: a club in which a member participates, often in a single project area

Senior: A 4-H member who is 14, 15, 16, 17, 18 or 19 years old

Shared Report: A custom report created by a higher-level manager and shared with accounts in lower levels

Standard Report: A report created by 4HOnline available to run and/or print at any time

Transfer: an invoice printed at the county level and mailed with a payment to the State 4-H Office

Upload Field: a form field often used on registration forms in which the registrant is asked to upload a document or picture

Verification: A check box that indicates all of the information about an animal is correct and complete

Volunteer Screening: An additional page of required information for registered volunteers that correlates with the Volunteer Work Agreement

Youth (Short-Term): A youth member who only participates in a 4-H group, not a 4-H Club, for a portion of the year. Often Shooting Sports members may be short-term. Unless a group enrollment is created from the group in which a short-term member is enrolled, short-term members do not count on the ES237

Youth: A youth 4-H member (ages 5 – 19)