4-H Online

4-H ENROLLMENT AND EVENT REGISTRATION

County Manager Guide

(Updated 07/22/2020)

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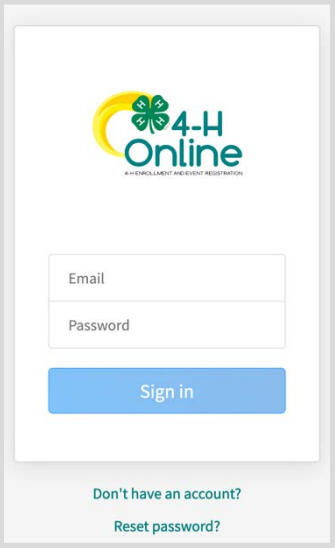
County Manager Sign-in

The County Manager account must be created by the System Manager and permissions set for the account prior to County Managers logging in.

1. Go to http://v2.4honline.com. (Production environment only). Go to http://training.4honline.com for the Training environment.
2. Enter your email address.
3. Enter your password.
4. Click the Sign in button.

NOTE: The password requirements in 2.0 are different than 1.0. If your 1.0 password does not let you login, please use the Reset Password link. Enter your manager email address, and a temporary password will be emailed to you. Login with the temporary password, you will be prompted to update your password.

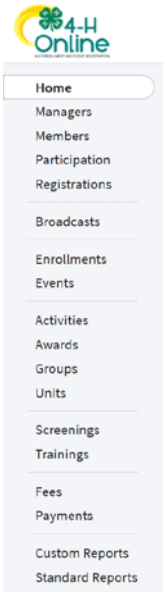


Navigation Pane

The navigation pane is located on the left side of the page. It is visible on all pages within the system. The navigation pane will let you quickly move to different areas of the program to communicate with members, create broadcast emails, manage enrollments, events, groups, and work with reports.

1. Click on the appropriate category in the navigation pane to move throughout the system.

For more information on navigating 4-H Online 2.0, see Basic Navigation Tips.

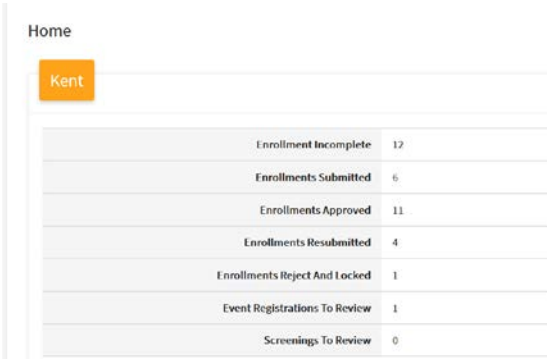


Home Screen

The Home Screen feature allows the county manager to see a quick snapshot of the program and number of items that need attention.

Reviewing the Manager Home Screen

1. Click Home in the navigation pane.
2. There is a list of the number or records in various enrollments statuses, event registrations and screenings that are waiting for approval.



Managers

The Managers area will provide a list of all manager accounts that have been setup to access the county. Manager accounts are created, and permissions associated with the account by the System Manager.

Viewing the Managers List for the County

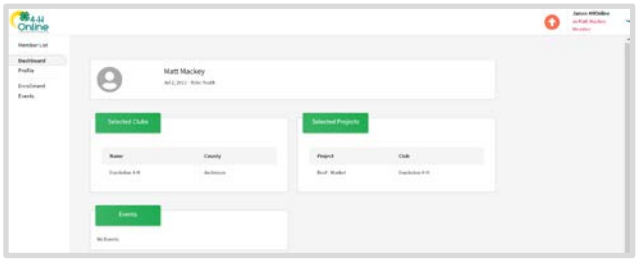
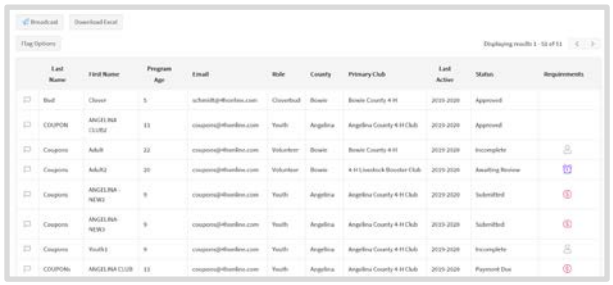
1. Click on the Managers tab in the navigation pane.
2. View the list of Managers that have been setup for the County.

Members

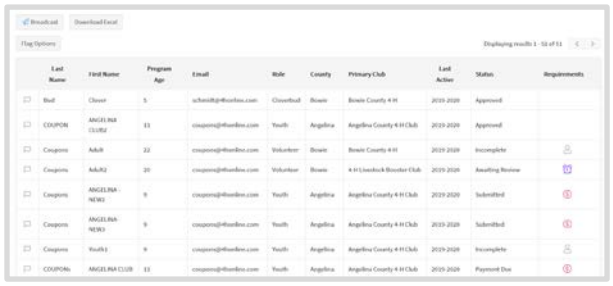
The Members area allows the County Managers to search for members, view the member status, check on requirements that are not yet met, view the enrollment information and access family and member profiles. The Members area looks at members across all program years.

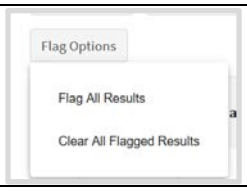
Members Search

1. Click on the Members tab in the navigation pane.

2. You may enter a keyword (4-H Age, Birthdate, Email, Name, Phone number), and filters for Counties, Clubs, Role, Status, and/or Enrollment Date range. 3. Click the Search button.	
4. The results will be displayed below the search area. 5. The results will display 100 records at a time. Click the > button to view additional pages of results if applicable. 6. Hover over the icon in the Requirements column to see which requirements are not yet met.	
7. Click on a Member's record to access the member's dashboard, family profile, enrollment, events, and other items in the Family account.	
8. Click the Broadcast button to send a message to the members listed in the Search results. 9. Click the Download Excel option to download the search results to a raw Excel file.	

Flagging Member Records

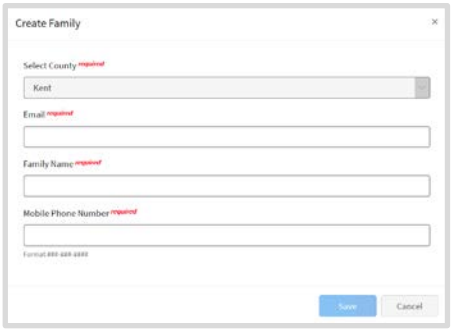
1. Members may be flagged on the Member Search screen. 2. Flag records one record at a time by clicking the Flag icon next to the Member record. 3. Click the Flag Options button and select Flag All Results to flag the records in bulk.	

Clearing Flags from Member Records

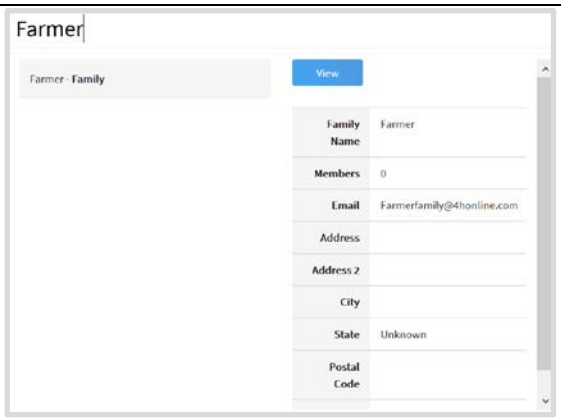
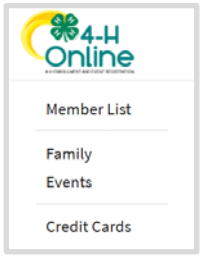
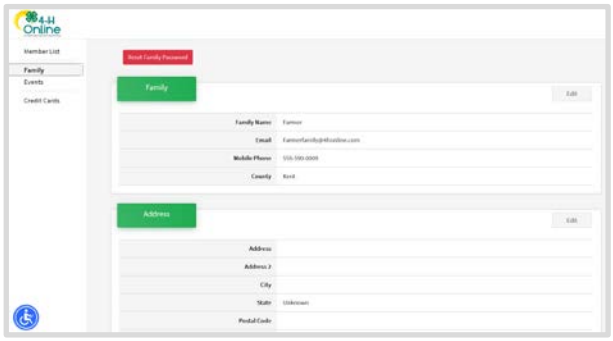
1. Member Flags can be removed from records on the Member Search screen 2. You can remove flags one member at a time by clicking the Flag icon in line with the member record. 3. Click the Flag Options button and select Clear All Flagged Results to remove the flags from records in bulk.	

Creating Family Profiles

1. Click on the Members tab in the navigation pane. 2. Click the Create Family button in the upper right corner.	
3. Enter the family's email address, Family Name, and Mobile Phone Number. The family county will default to the same county the manager is accessing when creating the family. 4. 4. Click the Save button. NOTE: The family email address is currently required. This requirement will be removed in an upcoming update to the program.	

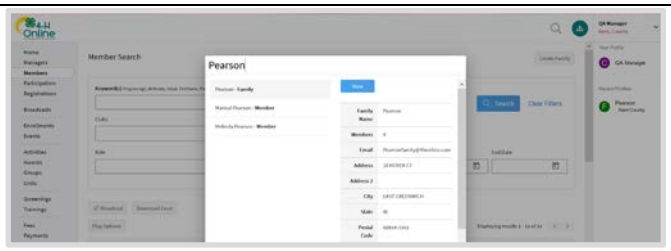
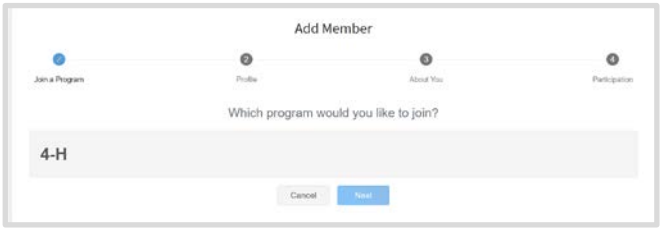
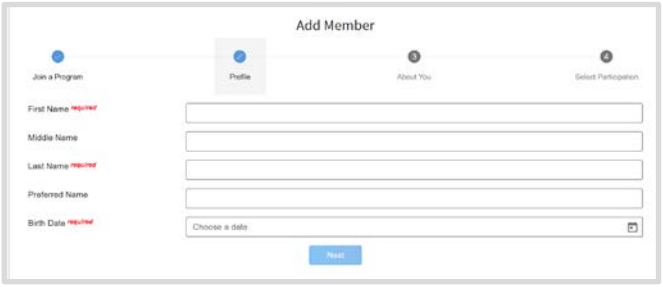
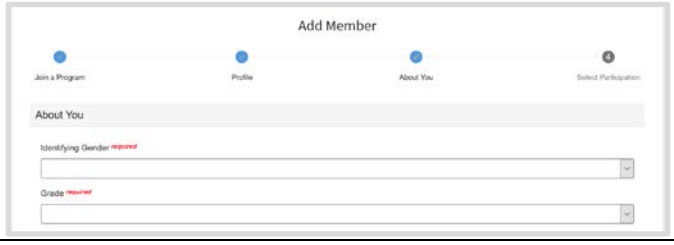
Editing Family Information & Resetting Family Password

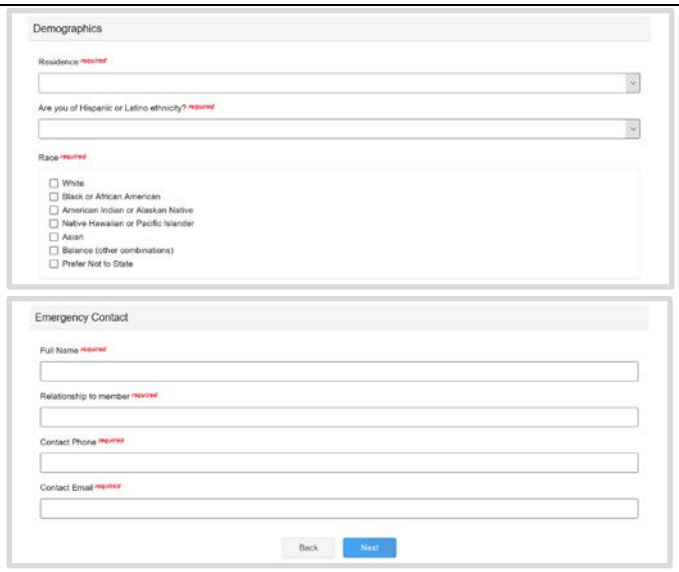
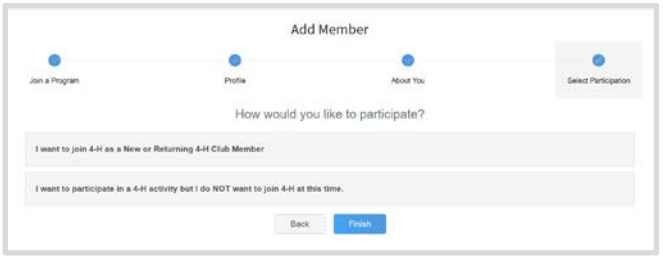
1. Click on the Magnifying Glass from any screen.	

2. Enter in the Family last name in the Global Search. 3. Review the records that are returned. 4. Click View next to the record you need to modify.	
5. Click Family in the navigation pane. 6. Click Edit next to the area you need to modify. 7. Edit the family information and click Save. 8. If you need to reset the Family Password, click the red Reset Family Password button. 9. The temporary password will appear in a pop-up window. 10. Click Confirm. 11. The family will receive an email with the temporary password.	 

Adding Members to a Family

1. Creating a family profile will immediately direct you to adding members to the family (Skip to step 6). 2. If the family profile was created previously you can still add new member records to the family. Click on the magnifying glass at	

the top of any page and use the Global search for the Family last name. 3. Click the View button next to the Family.	
4. Review the existing Members list. 5. Click the Add Member button.	
6. Select the appropriate program for the member. 7. Click the Next button.	
8. Complete the member information. 9. Click the Next button.	
10. Complete the About You, Demographics and Emergency Contact information. 11. Click the Next button.	

	
12. Select how the member will participate in 4-H and click the Finish button. A) Selecting that they want to join as a new or returning 4-H Member, Cloverbud, or Volunteer will proceed to the enrollment process. B) Selecting that they want to participate in a 4-H activity, but not join at this time will create a profile for the individual. This individual can be enrolled later.	
13. Click the Select Clubs button. 14. A pop-up window will appear. 15. Select the county from the drop-down menu to view the list of clubs. 16. Click the Add button next to the club that is be added to the member's enrollment. 17. Repeat Steps 13 – 16 for each club to be added to the member's enrollment. 18. Click the Continue button when all of the member's clubs have been added to the member's enrollment.	

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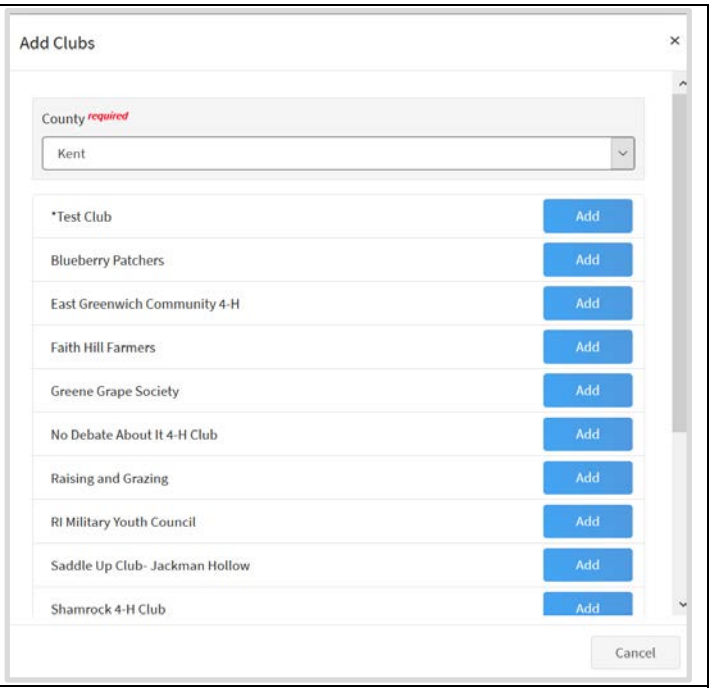
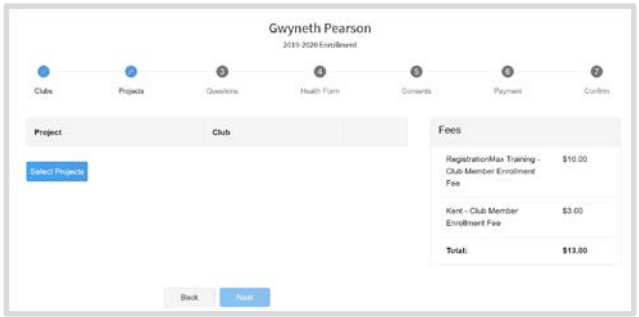
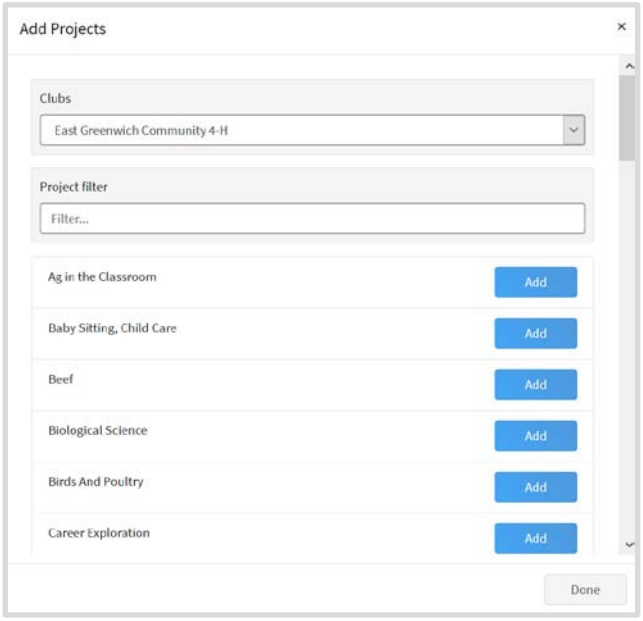
<td> 
</td>
</tr>
<tr>
<td>19. Click the Select Projects button.
20. A pop-up window will appear.
21. Select the Club that the project will be associated.
22. Click the Add button next to the project name to add the project to the enrollment.
23. If a project consent is required to be signed it will appear on the screen. The Manager will need to type their own name (manager name) into the consent field that they have received the signed consent from the member and parent/guardian.
24. Click the radio button for the consent.
25. Click the Accept button.
26. If a consent is required and it is Declined, the project will not be added to the member’s enrollment.
27. Repeat Steps 19 – 22 for each project that is added to the member’s enrollment.
28. Click the Next button when all the member’s projects have been added to the enrollment.</td>
<td> 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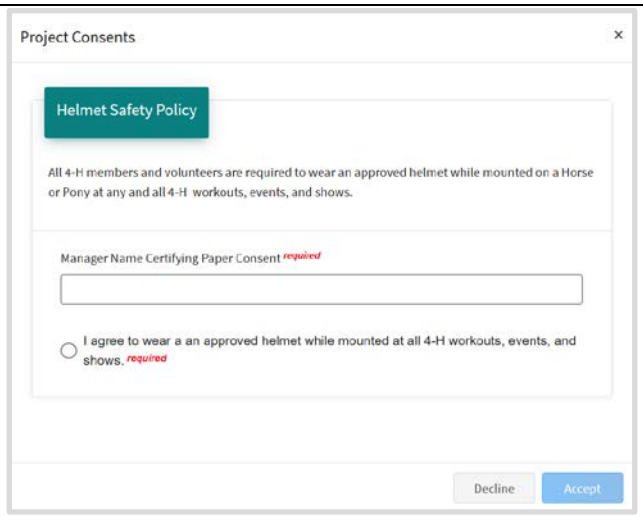
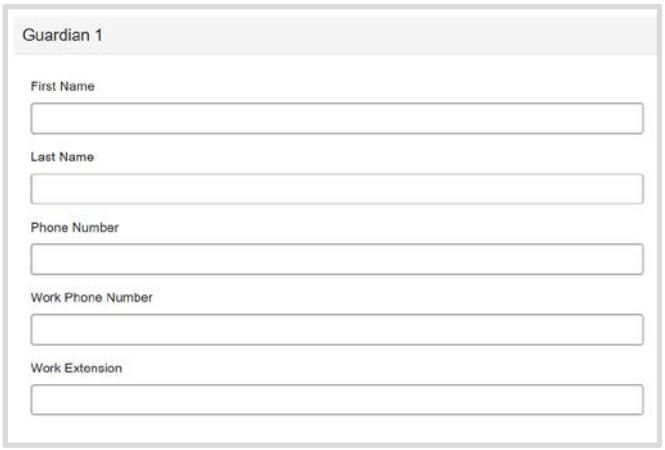
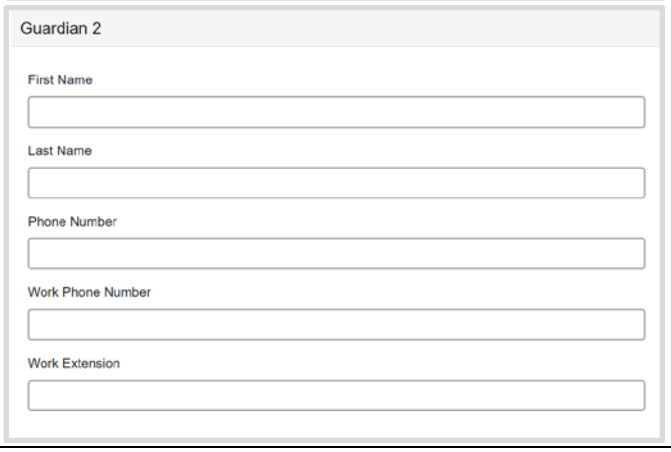
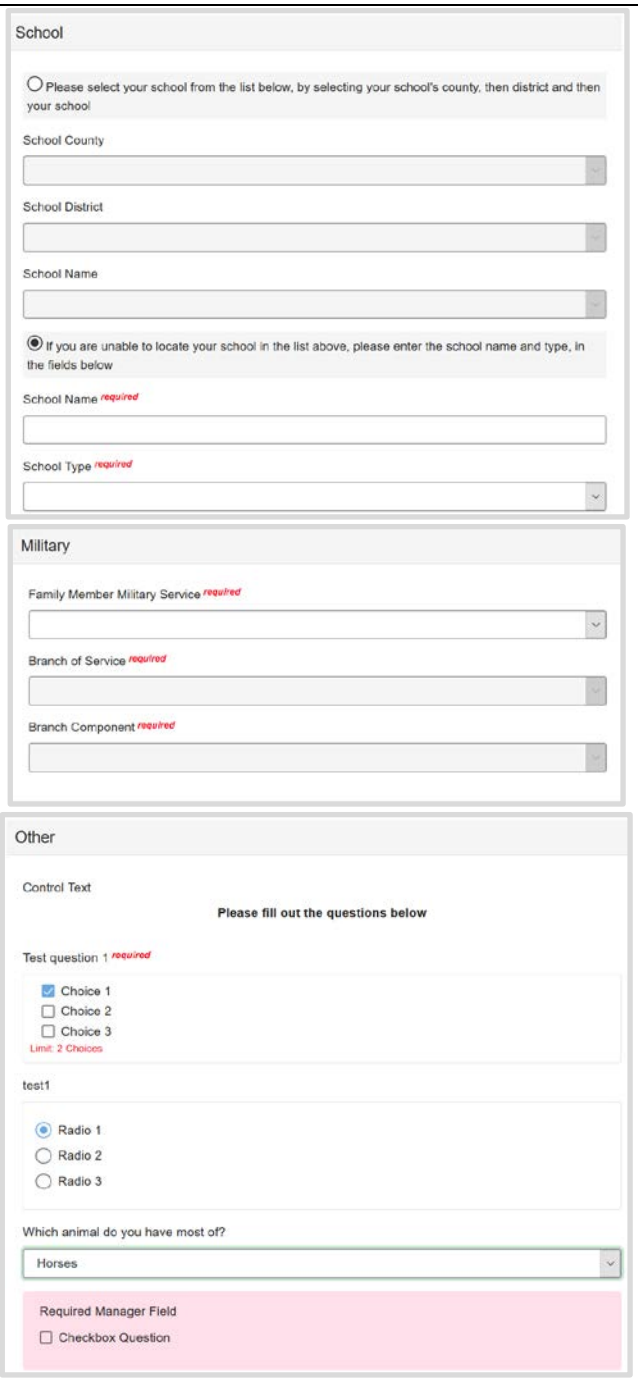
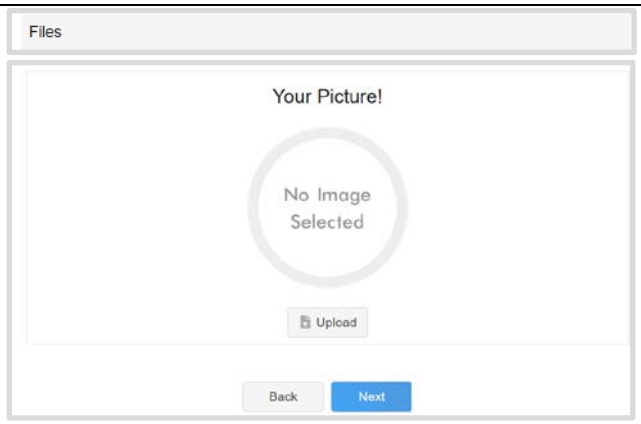
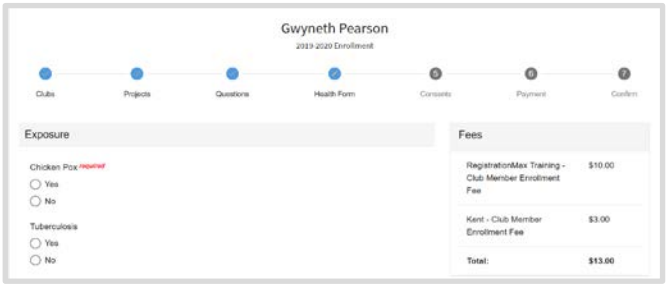
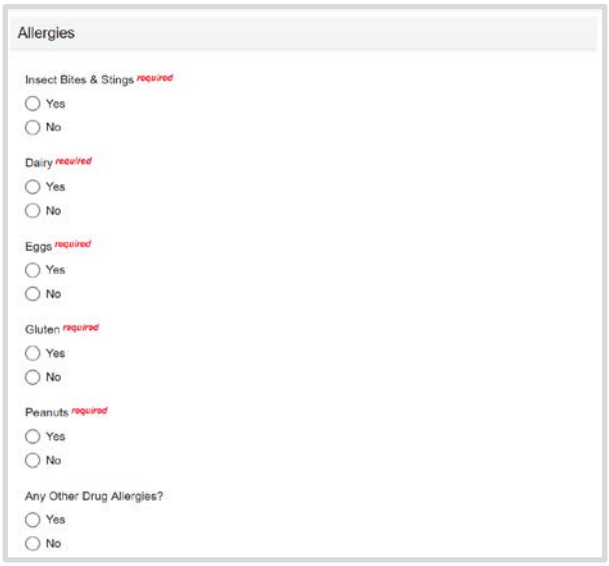
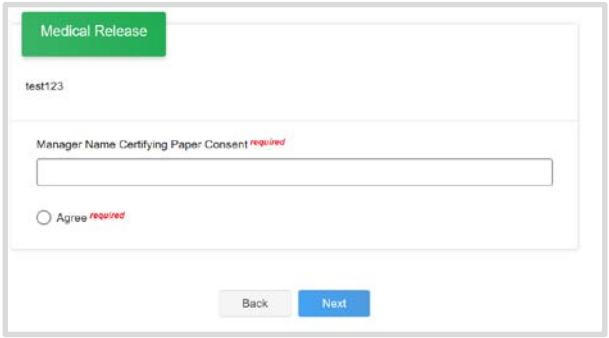
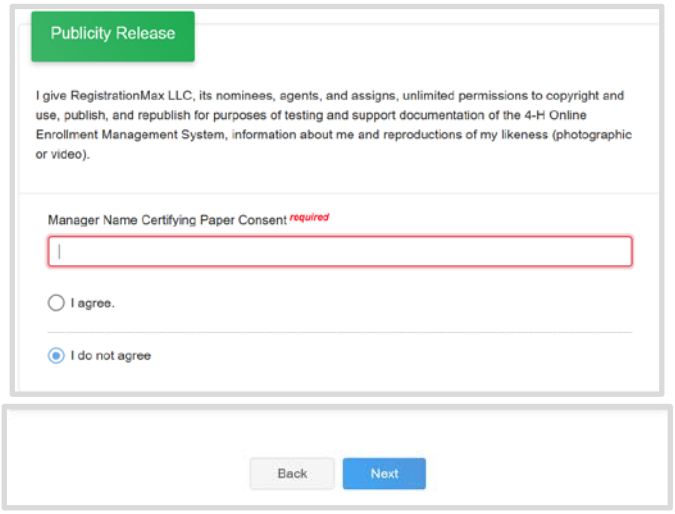
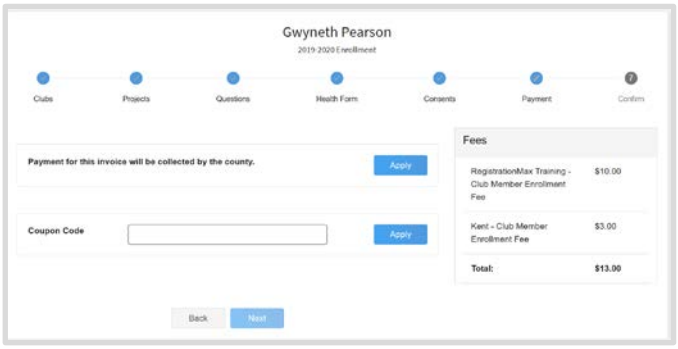
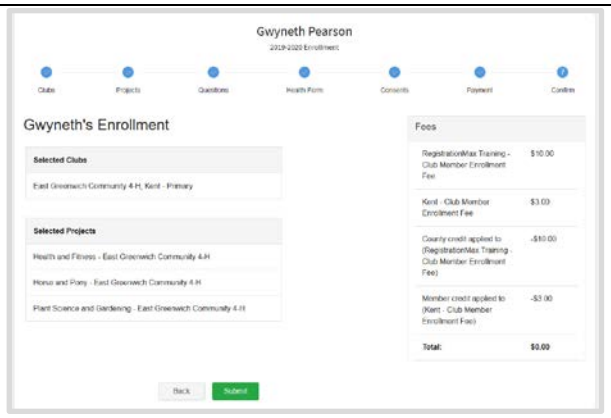
	
29. Review the About You, Demographics, and Emergency Contact information that was entered when the profile was created. Make corrections as needed. 30. Complete the Guardian, School, and Military information. NOTE: Guardian 1 information will become required for all Cloverbud and Youth aged members) 31. Complete the Other Questions and upload Files sections if applicable to your state. NOTE: Items that are required are marked with red text. Manager fields are highlighted, and only available for Managers to complete. 32. Click the Next button.	 


School
Please select your school from the list below, by selecting your school's county, then district and then your school
School County
School District
School Name
If you are unable to locate your school in the list above, please enter the school name and type, in the fields below
School Name required
School Type required
Military
Family Member Military Service required
Branch of Service required
Branch Component required
Other
Control Text
Please fill out the questions below
Test question 1 required
Choice 1
Choice 2
Choice 3
Limit: 2 Choices
test1
Radio 1
Radio 2
Radio 3
Which animal do you have most of?
Horses
Required Manager Field
Checkbox Question

	
33. Complete the health form. All required fields are labeled. Some fields are dependent, meaning if the response is yes, there may be a text field that requires an explanation or additional information. 34. The manager will enter their own name in the signature field for the Medical Release. The manager is certifying the receipt of the paper enrollment form with the consent signed by the member and parent/guardian.	  

35. Complete each of the Consents presented for the member. In addition to selecting the radio button that corresponds to the member's response to the consent, the Manager will enter their own name in the signature field certifying they have received the paper enrollment form with the signed consents. 36. Click the Next button.	 
37. If there are fees associated with the enrollment, select one of the following options: A) Payment for the invoice will be collected by the county – select if the family submitted payment directly to the county. B) Coupon Code – Enter the coupon code(s) if another entity has sponsored to cover the fee for the member and click Apply. 38. Click the Next button.	
39. Review the Club and Projects that were selected. 40. Click the Submit button.	

Participation

The Participation section allows managers to search for members based on the way they are participating. This includes clubs, roles, status, and projects (awards and activities coming soon).

Participation – Member Search

1. Managers may search for members based on keywords, club participation, Role, Status, enrollment dates and/or projects. 2. The menus are multiple select menus, meaning you can choose more than one club, role, status and project in a single search request. Click in the field for the drop-down menu to appear and make your selections. 3. Click the Search button. 4. The results will be listed below the search boxes. 5. You may send a broadcast email to the search results if needed. (See the section on sending a Broadcast email. 6. You may click the Download Excel button to get a list of the search results in an Excel file.	

Registrations

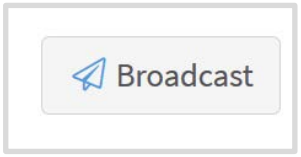
The Registrations area allows County Managers to search for members associated with event registrations. Additional information will be added to this area as the screen are finalized to add filters for events and include the event name in the returned record grid.

Broadcast

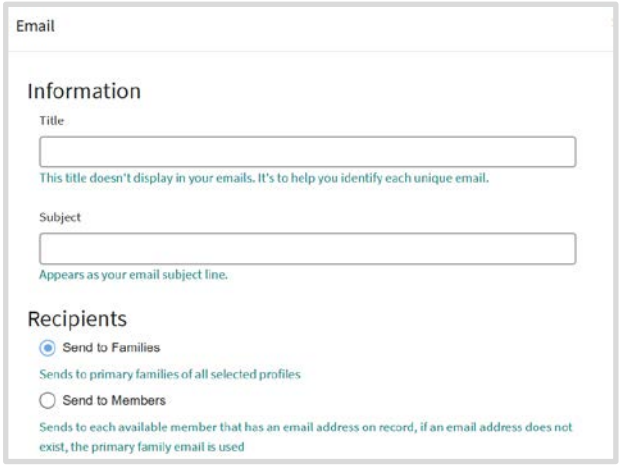
The Broadcast tab in the navigation pane allows the County Manager to view the title and status of broadcast emails that have been sent from the account. Click on any message to be able to view the text of the message and the recipient list.

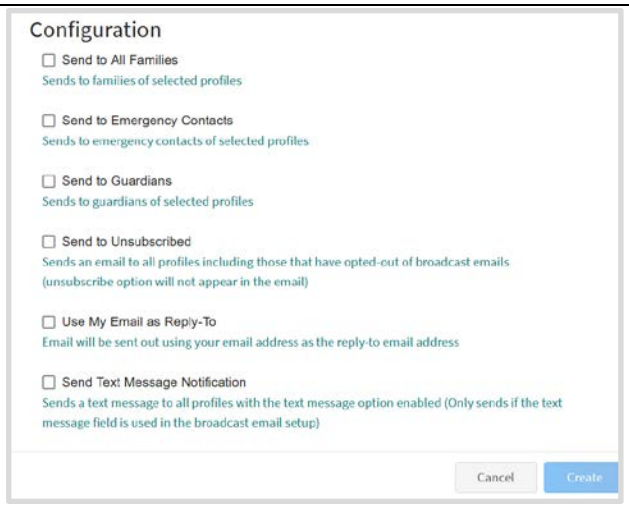
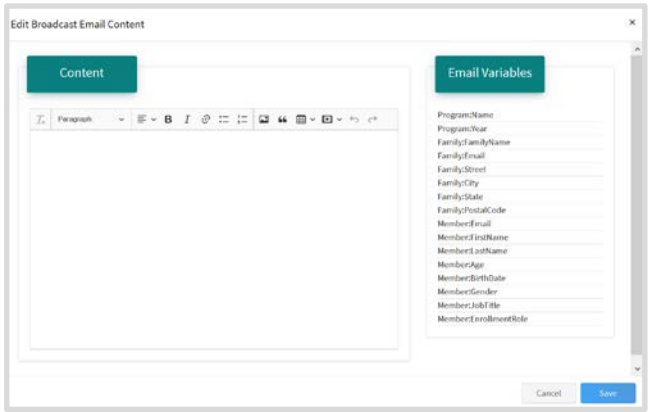
Creating Broadcast Emails

1. Throughout the program, County Managers will see a Broadcast button on various screens. Click the Broadcast button to create an email to send members.
   A) Members – Send to members displayed in search results
   B) Enrollment: Approved – Send to all approved members
   C) Events – Send to members listed in the registration search results
   D) Participation – Send to members listed in Participation Search results
   E) Units – Send to members listed in a Club or Group
   F) Custom Reports – Send to all members listed on the selected report



2. Enter the title of the message in the Title field.
3. Enter the Subject of the email message
4. Indicate if the message should be sent to Families (email address associated with the family profiles) or Members (email address associated with member profiles)
5. You may selection additional Configuration Options for the message. These include:
   A) Send to All Families
   B) Send to Emergency Contacts
   C) Send to Guardians
   D) Sent to Unsubscribed
   E) Use My Email as Reply-To
   F) Sent Text Message Notification
6. Click Create



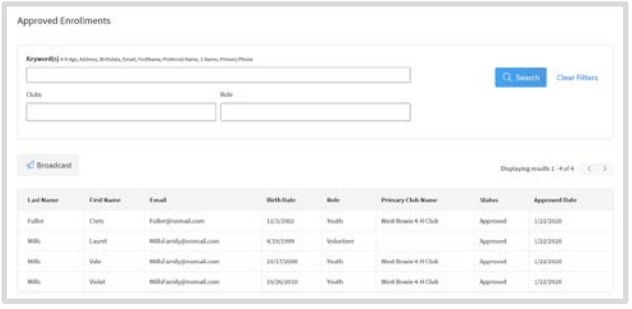
	
7. The Recipient and Sender information will automatically fill into the To and From Fields. 8. Click Edit next to Details to make corrections to the Title or Subject of the message. 9. Click Edit next to Options to make changes to the configuration options selected.	
10. Click Edit next to Content to compose your message. 11. You may add an Email Variable (aka Form Field) to your message. Click the Email Variable name in the location you want to add the field. 12. Use the formatting bar to format the text of your message, add images, and create clickable links to websites. 13. When finished composing your message, click the Save button.	 
14. Attachments may be added to Broadcast emails. Click the Upload	

button and select the file from your computer that you want to attach to the message.	
15. Review the Recipients list that the message will be sent to based on your selections.	
16. When the message configuration, message text, and attachments (if applicable) are correct, click the Send button located at the top of the page.	

Enrollment

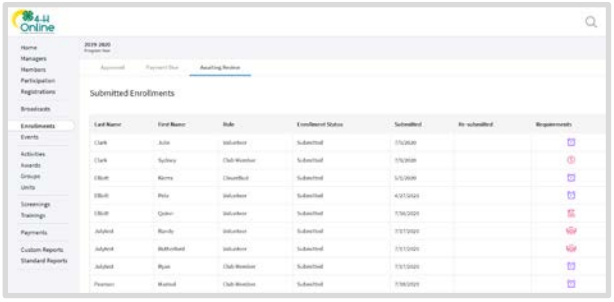
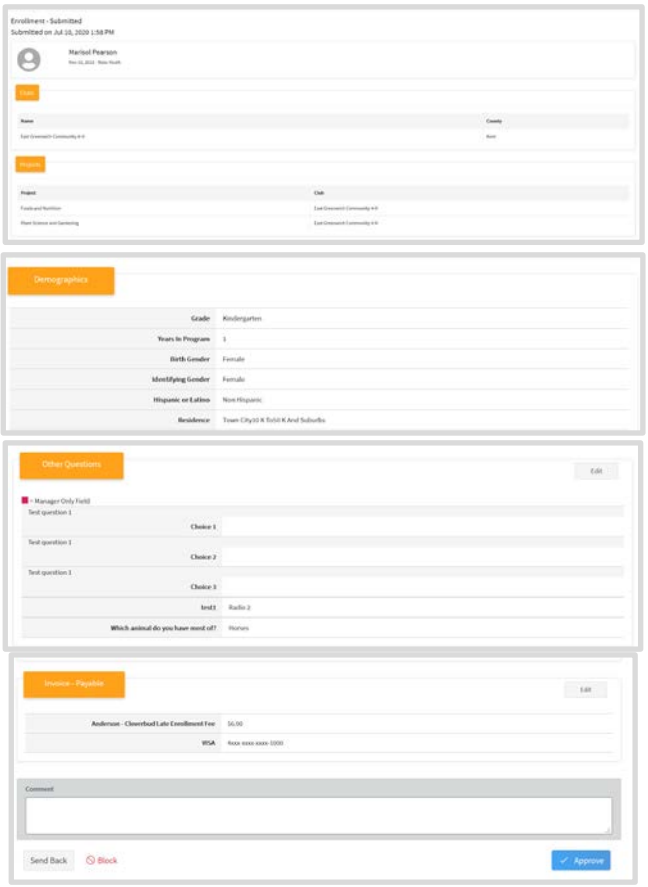
The Enrollment tab contains sub-tabs for viewing Approved and Submitted enrollments. The member records listed in this area pertain to the current program year.

Viewing Approved Enrollments

1. Click on the Enrollments tab in the navigation pane. 2. Click on the Approved sub-tab. 3. You may Search for approved members. 4. Enter key words and use the Club and Role filters if needed. 5. Click the Search button. 6. The returned records will appear in a grid below the search area. 7. Click on a specific record to view the enrollment.	

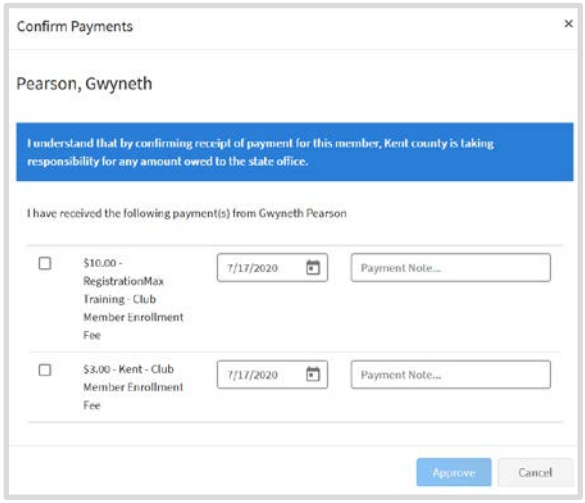
Reviewing Enrollments

1. Click on the Enrollments tab in the navigation pane.	

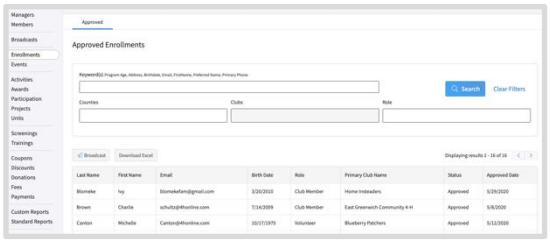
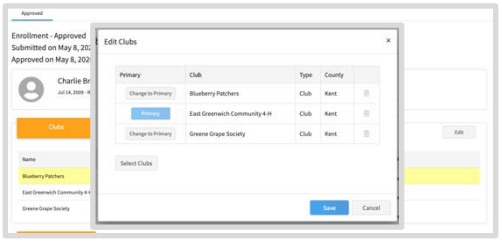
2. Click on the Awaiting Review sub-tab. 3. The screen will list all enrollments that have been submitted. 4. Hover over the symbol in the requirements column to see what is needed for the enrollment to become Active. Records that have an alarm clock symbol are ready to be reviewed.	
5. Click on the member's name to review their enrollment information. 6. If applicable, click the Edit button for Other Questions to modify responses or to enter responses for manager only questions. 7. If applicable, upload any files that are needed. These may be manager only file uploads, or files uploaded by the member that need to be replaced. 8. If applicable, click the edit button for the Invoice to apply a coupon code. 9. If the enrollment will be returned to the member for corrections, please enter a comment for the user and click Send Back. The comment will be included in the email they receive to notify them that the enrollment has been returned. 10. In the rare case that the member enrollment is to be Blocked and prevented from enrolling for the rest of the program year, click the Block button. This member will not be allowed to enroll. 11. To approve the member, at which time credit card transactions will be processed, click the Approve button.	

Recording Enrollment Payments Received in the County Office

1. Click on Enrollments in the navigation pane. 2. Click on the Payment Due subtab.	

3. The list of members that have submitted enrollment and indicated they would make payment in the county office is listed. Click on a member name to record their payment information when it has been received. 4. Select the items that have been received. 5. Select the date the payment was received. 6. Use the Payment Note field(s) to record the check number or that it was a cash payment, receipt number, or any other notes that you need to keep record of according to your state's policies. 7. Click the Approve button. 8. Payments should only be recorded after they have been received from the family for accurate record keeping.	

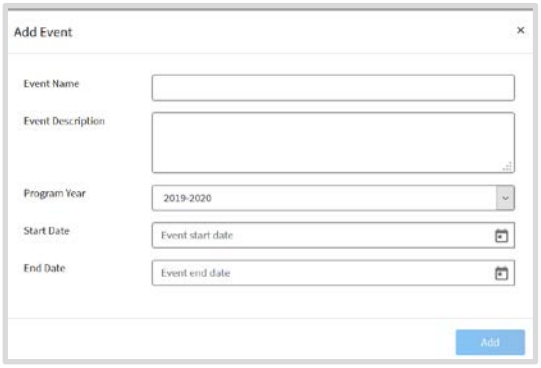
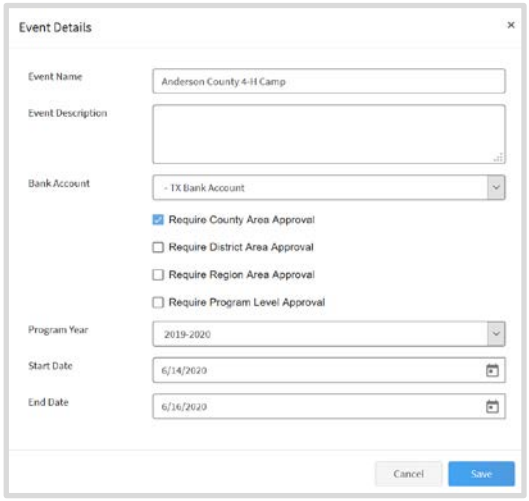
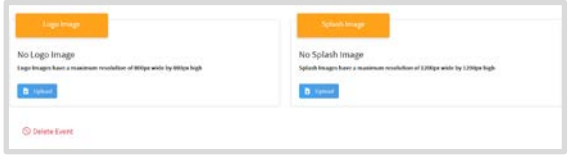
Modifying a Member's Approved Enrollment

1. County Managers may modify a member's approved enrollment. Go to the Enrollments tab in the navigation pane. 2. On the "Approved" sub-tab, search for the member's name and click on the record.	
3. Click the edit button next to the category you need to modify (Clubs, Projects, Other Questions). 4. You may add additional clubs, add projects, and modify custom question responses as appropriate. 5. Click Save to save the changes to that section.	

Events

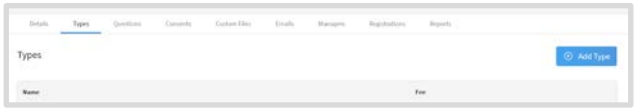
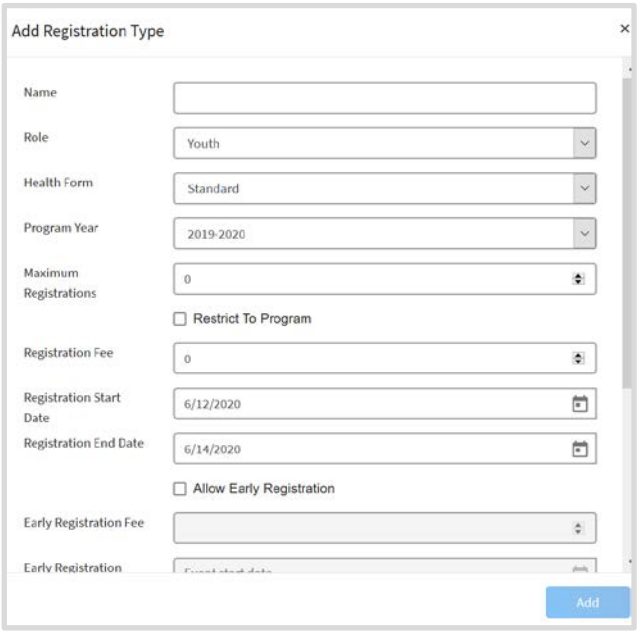
County Managers with permissions may setup and manage events. Additional Managers may be added to view registrations or to assist with the management of registrations.

Creating an Event

1. Click on the Events tab in the navigation pane. 2. Click the Add Event button to create a new event.	
3. Enter the name of the event. 4. Enter the Event Description. 5. Select the program year in which the event will occur. 6. Enter the Event Start Date. 7. Enter the Event End Date. 8. Click Add.	
9. Review the Event details. 10. Click the Edit button to modify the event details if needed. 11. If the event registrations need to be approved by a manager, select the level(s) of manager approval. 12. Click the save button when you are done making changes to the event details.	
13. You may upload a logo image for your event. 14. You may upload a Splash image for your event.	

The logo and splash image appear for families when they select an event for which to register a member. The logo is in the upper left corner next to the name of the event. The splash image is the large photo located above the Register button.	

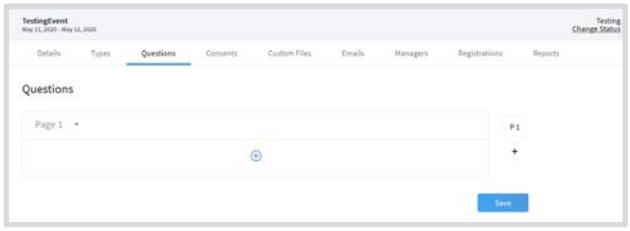
Creating Registration Types

1. Click on the Types sub-tab. 2. Click the +Add Type button.	
3. Enter in the name of the Registration Type. 4. Select the role from the drop-down menu that applies to the registration type. 5. Select the Health Form from the drop-down menu that applies to the event. 6. Verify the Program year for the event is correct. 7. Set the maximum number of registrations for the registration type. 8. If registration is limited to only members that are enrolled in the program, check the box for Restrict to Program. If this box is not checked, participants may register for the event. 9. Enter the registration fee if applicable. 10. Set the Registration Start Date. 11. Set the Registration End Date. 12. If Early Registration is available (i.e. discounted registration fee for early registrants), check the box to allow Early Registration. Otherwise, skip to Step 16. 13. Set the Early Registration Fee. 14. Set the Early Registration Start Date. 15. Set the Early Registration End Date. (NOTE: It should not overlap with the Registration Start Date in step 10)	

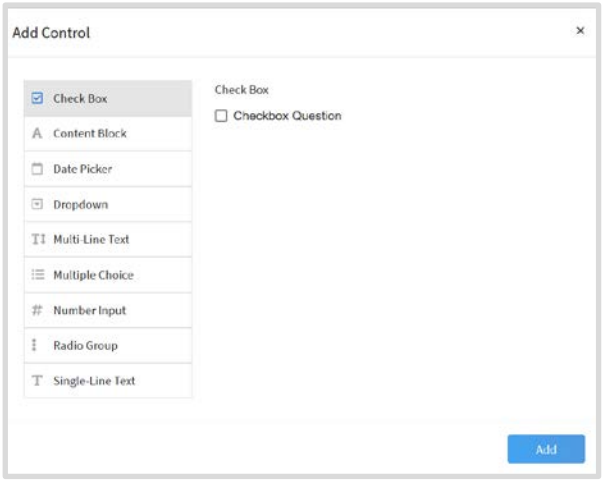
16. If available, check the box to Allow Late Registration (i.e. a different registration fee applies to late registrations). Otherwise, skip to step 20. 17. Set the Late Registration Fee. 18. Set the Late Registration Start Date. (NOTE: It should not overlap with the Registration End Date in Step 11) 19. Set the Late Registration End Date. 20. Click Add. 21. Repeat Steps 2 – 20 for each registration Type that you are setting up for the event.	

Creating Custom Event Questions

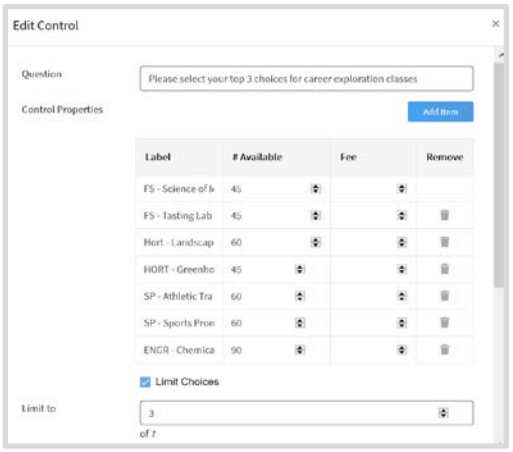
1. Click on the Questions sub-tab.
2. Click the + sign to create a question.

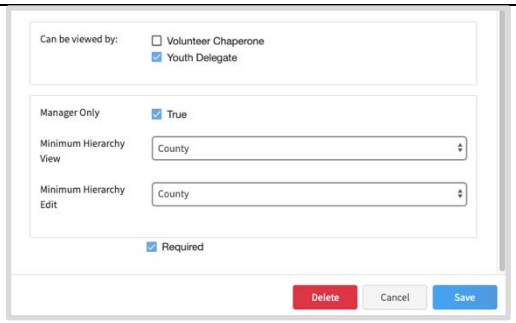


3. Select the type of question you would like to create from the list of options.
   A) Checkbox – a single option (not recommended for Yes/No questions)
   B) Content Block – text information
   C) Date Picker – date field
   D) Dropdown – menu of selections
   E) Multi-Line Text – long text response
   F) Multiple Choice – multiple responses may be selected
   G) Number Input – numerical response
   H) Radio Group – single response selection (use this for Yes/No questions)
   I) Single-Line Text – short text responses
4. Click the Add button.

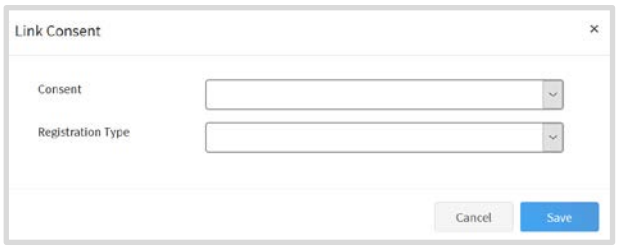


5. Enter in your question.
6. Setup your option Labels.
7. If there is a limited number of registrants that can select each option label, enter the number in the # Available fields.
8. If a fee is associated with each selection, enter the fee amount. This amount is in addition to the registration fee.
9. If the member may only select a certain number of options, check the Limit Choices box and enter the number of choices that may be selected.

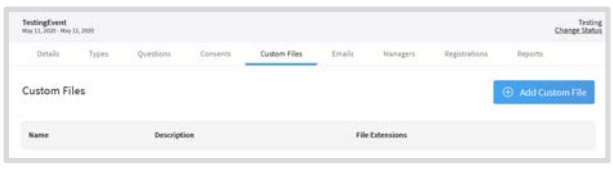


10. Select the registration type that can view the question. 11. If the fields should only be answered by a manager, check the True box for Manager Only. 12. Use the Minimum Hierarchy View menu to choose the lowest level of the hierarchy for Managers who may view the question and response. (Institution or County) 13. Use the Minimum Hierarchy Edit menu to choose the lowest level of the hierarchy for Managers who may edit the response. 14. Check the Required box if a response is required. NOTE: If a checkbox question is required, the member will be required to check the box(es). 15. Click the Save button. 16. Repeat steps 2 – 15 for each question you need to add.	

Event Consents

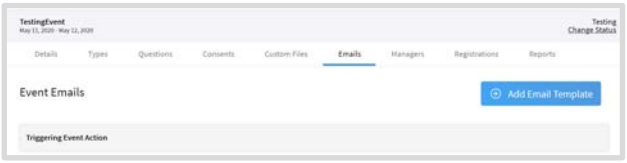
1. Click on the Consents sub-tab. 2. Click the + Associate Consent button.	
1. Choose the consent title you want to associate with the event. 2. Choose the Registration Type that will need to complete the consent. 3. Click the Save button. 4. Repeat for each consent and each registration type that needs to complete the consent in order to participate in the event.	

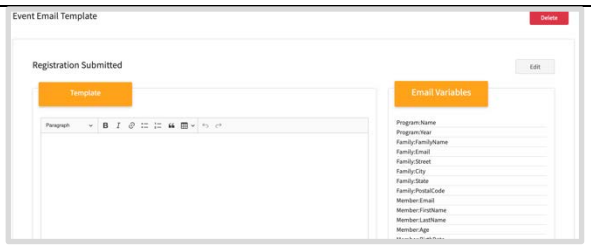
Event Custom Files

1. If your registrants should upload a file as part of their registration, click on the Custom Files sub-tab. 2. Click the + Add Custom File.	

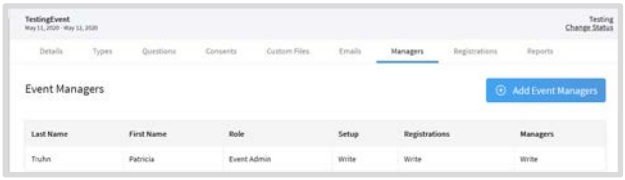
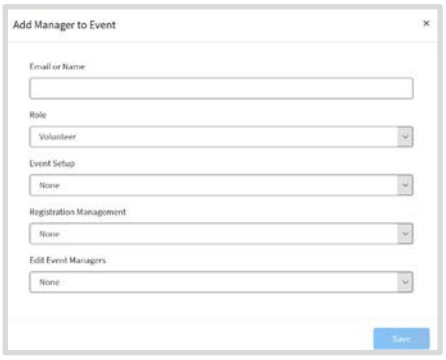
3. Enter the name of the custom file. 4. Enter a description of the file. 5. Use the Type drop-down menu to select the type of file to be uploaded. A) High Quality Image (.tiff) B) Image (.jpg, .png, .gif) C) PDF 6. Check the box next to the Registration Type(s) that will be uploading the files. 7. Click the Add button.	

Event Emails

1. Click on the Email sub-tab. 2. Click the +Add Email Template button.	
3. Enter in the Display Caption (subject). 4. Use the Type drop-down menu to select the type of action that will trigger the sending of the email. A) Partial Payment Applied B) Payment Approved C) Payment Declined D) Payment Refunded E) Registration Approved F) Registration Declined G) Registration Moved to the Next Level H) Registration Sent Back I) Registration Submitted 5. Click the Add button.	
6. Click on the template on the list to update the text of the email template.	

7. Click Edit to add or change the text of the message. 8. Enter the text of the message. 9. Click on an email variable to insert a form field to customize the message. 10. Click Save at the bottom of the message.	

Event Managers

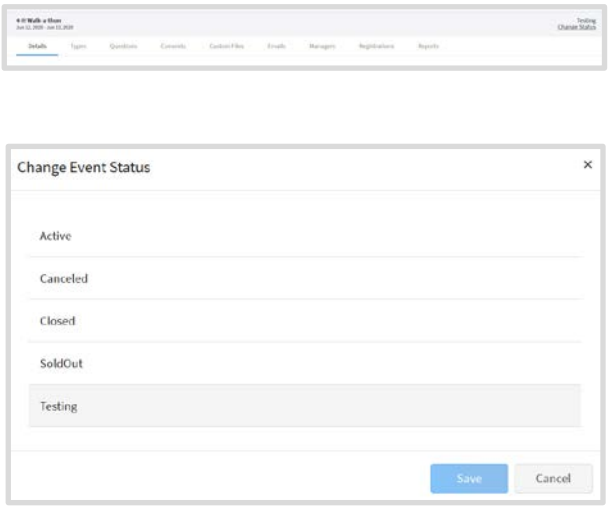
1. Click on the Managers sub-tab to assign managers to the event. The manager creating the event will appear in this list by default as well as the primary admin for that area of the hierarchy. 2. Event Managers may be added to any event from any level of the hierarchy. County events may have Institution or County level Managers added to help manage the event, or they can be given read only access. Click the +Add Event Managers button.	
3. Enter the Manager's Name or email address. 4. Use the Role drop-down menu to select the manager's role. A) Admin B) Staff C) Volunteer 5. Use the Event Setup drop-down menu to select the manager's permission for setting up the event. A) None B) Read C) Write (edit) 6. Use the Registration Management drop-down menu to select the manager's permission to manage registrations. A) None B) Read C) Write (edit) 7. Use the Edit Event Managers drop-down menu to select the manager's permission to Edit Event Managers. A) None	

B) Read C) Write (edit) 8. Click the Save button.	

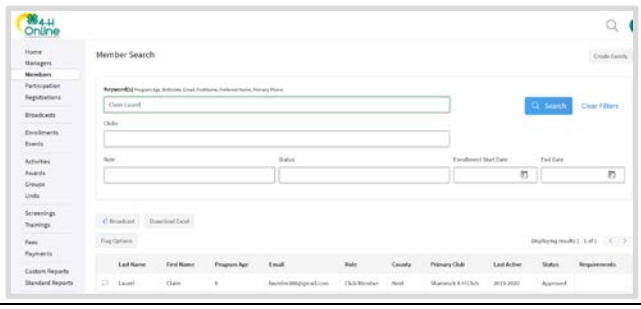
Registrations

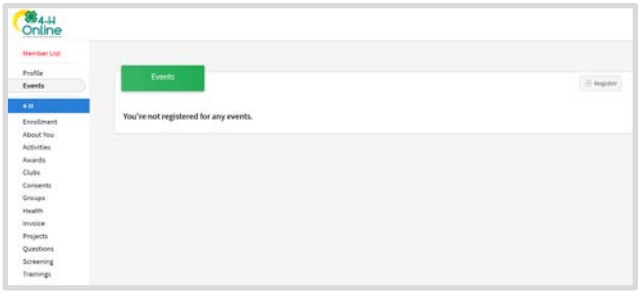
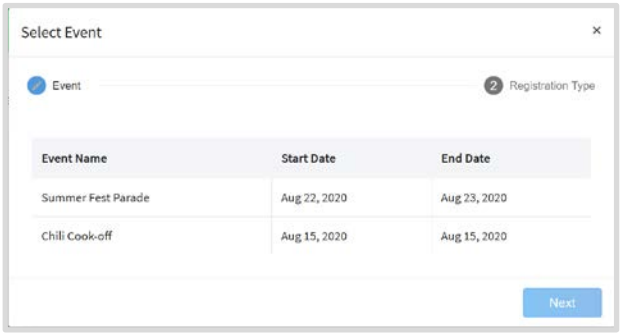
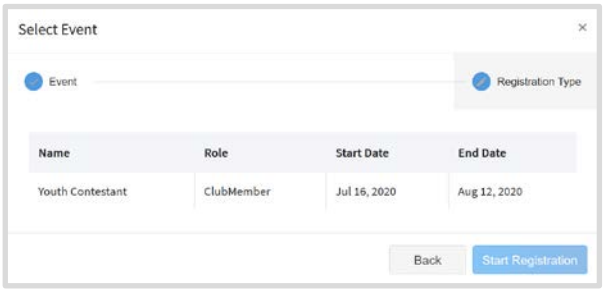
1. Click on the Registrations sub-tab. 2. Event managers with permissions may search and view registrations. Use keywords, and filters for Registration Status, Registration Type, Registration Dates and Approval Dates to search for specific registrations. 3. You may also send a broadcast email to the search results.	

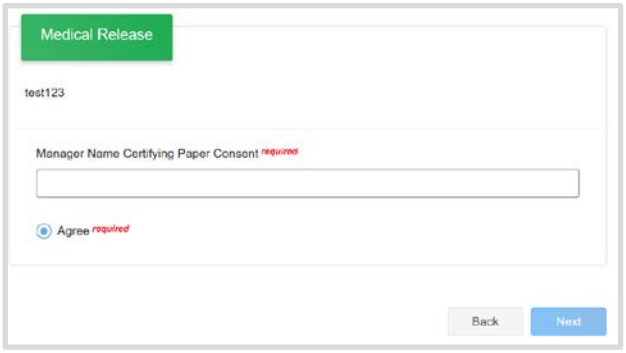
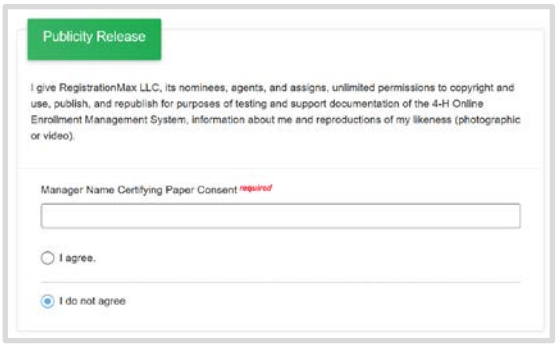
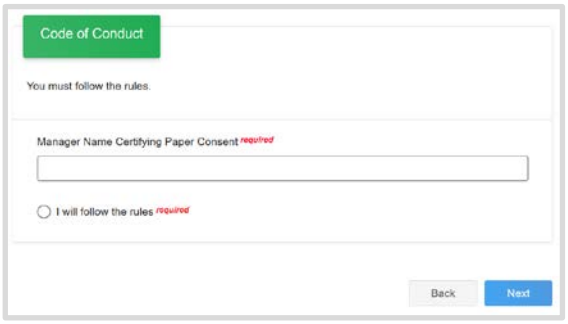
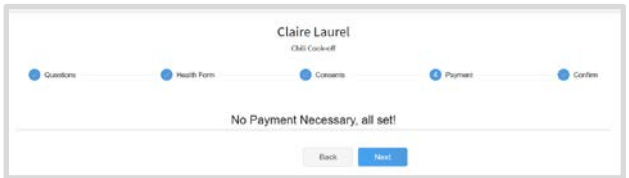
Making an Event Active

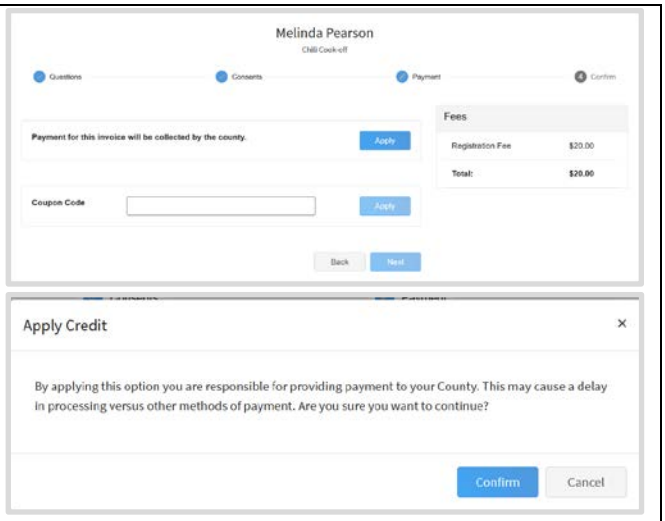
1. By default, the event is in Testing status during the setup process. 2. Click the Change status link in the upper right corner of any of the Event sub-tabs. 3. Select the new status of the event. A) Active – open for members to register B) Canceled C) Closed D) Sold Out E) Testing – make changes to the set up 4. Click Save. 5. If you need to make any changes to the setup of the event, you will first need to set the Event Status back to Testing.	

Managers Registering A Member for an Event

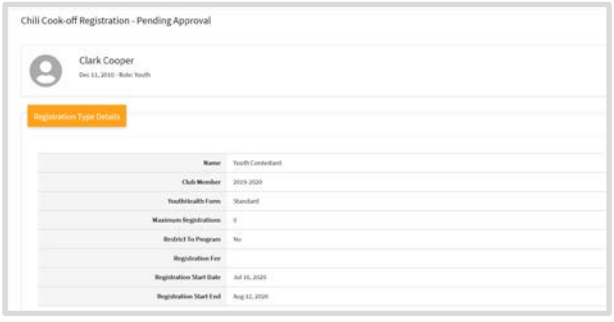
1. Click on the Members tab in the navigation pane. 2. Search for the member you need to register for an event. 3. Click on the member's name in the search results.	

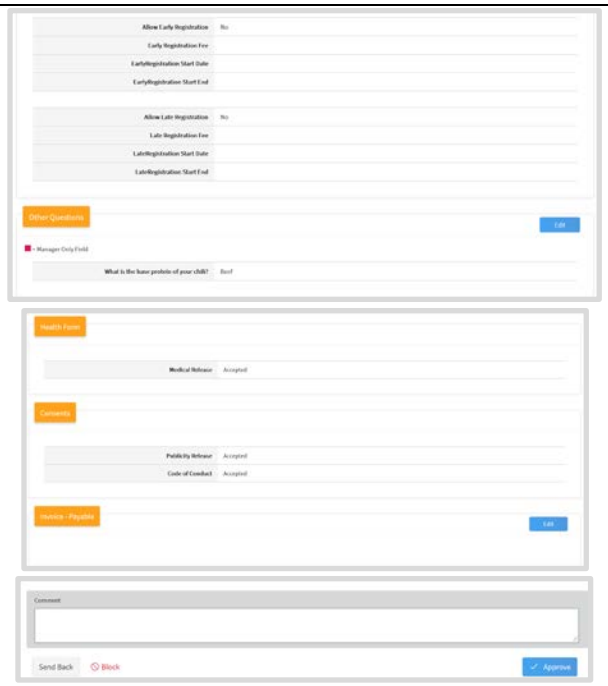
4. Click Events in the navigation pane. 5. Click the +Register button.	
6. Click on the name of the event the member is being registered for, and then click the next button.	
7. Click on the Registration Type the member is being registered as, and then click the Start Registration button.	
8. Complete the response for the Questions.	
9. Update the Health Form with any needed changes (if applicable). As a Manager, you will enter your own name in the electronic signature field indicating that you have received the	

signed paper copy of the health form. 10. Click the Next button.	 
11. Complete the Consents. Manager will enter their own name in the electronic signature field certifying they have received the signed paper consent form. 12. Click the Next button.	 
13. If no payment is due, click the Next button OR If payment is due, it can either be paid directly in the county office, or a coupon code can be entered if the	

registration fee is sponsored by a donor. Click the Apply button next to the appropriate payment method. If the member is paying in the county office, the manager will get a pop-up window and the manager will need to click the Confirm button to proceed. 14. Click the Next button.	
15. Click the Finish button.	

Reviewing Submitted Event Registrations

1. Click on the Events tab in the navigation pane. 2. Click on the Submitted sub-tab. 3. Click on the name of a record to begin the review process.	
4. Review the Registration Type Details, Other Questions, Health Form – Medical Release, Consents, and Invoice Information (if applicable). 5. Managers may edit the Other Questions responses and the Invoice to apply a coupon if applicable. 6. There are three options for processing the event registration: A) Approve – accept the registration B) Send Back – enter comments and click Send Back to return the event registration to the member for corrections	

C) Block – Rejects the registration and does not allow the member to register again.	

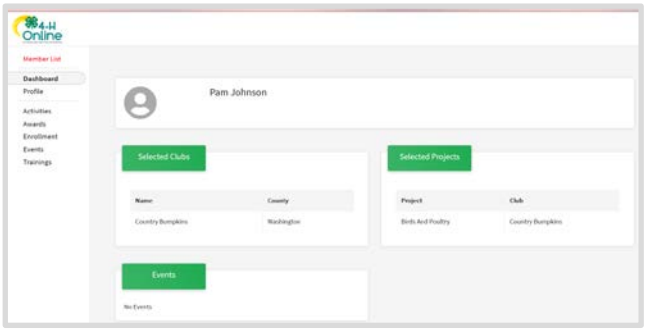
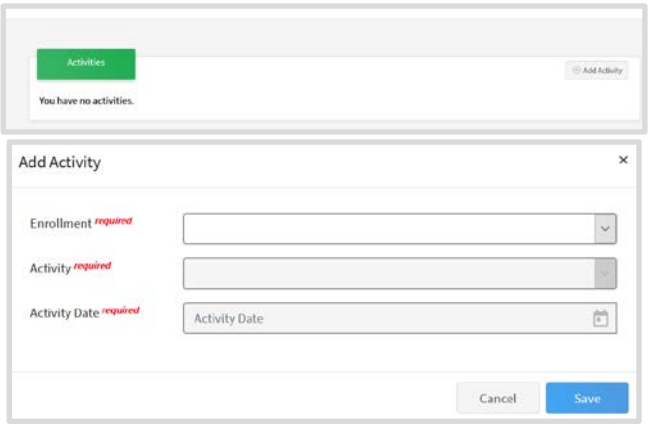
Activities

The Activities section allows County managers to create a list of county activities that may be added to a member's record.

Creating Activities

1. Click on the Activities tab in the navigation pane. 2. Click the 'Add Activity' button to add an activity to the list.	
3. Enter the name of the activity. 4. Enter a description of the activity. 5. Enter the status of the activity. a) Active b) Deleted c) Inactive 6. Enter a code (optional). 7. Click the Save button.	

Adding an Activity to a Member Record

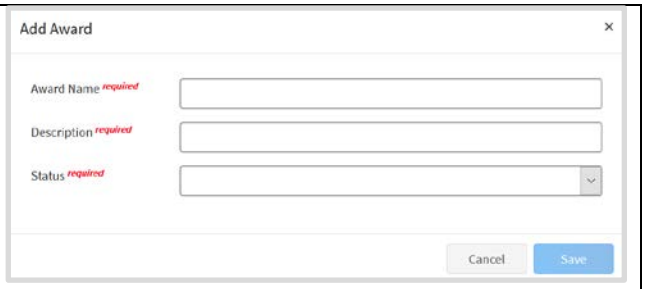
1. Click on the Member's record from the Member search screen. 2. Click on Activities in the navigation pane.	
3. Click the +Add Activity button. 4. Select the Enrollment Program Year from the drop-down menu. 5. Select the Activity from the drop-down menu. 6. Enter the date of the activity. 7. Click the Save button.	

Awards

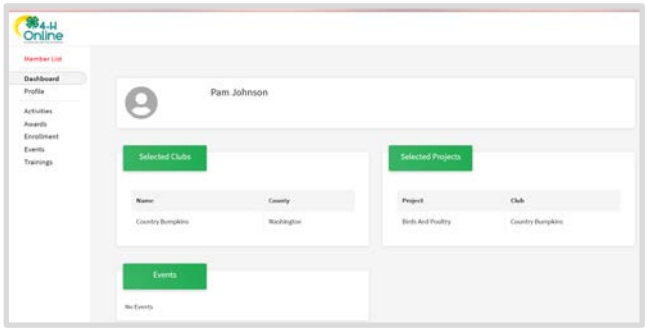
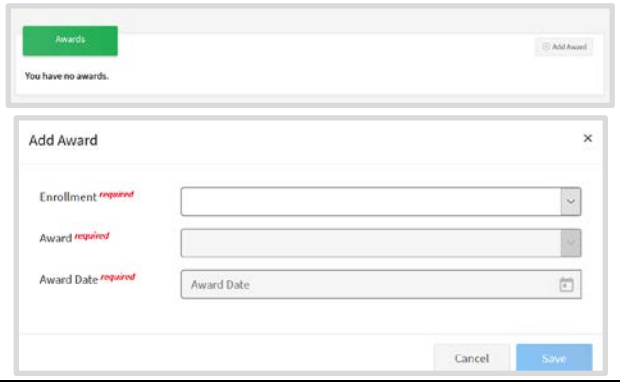
The Awards section allows County managers to create a list of county awards that may be added to members' records.

Creating Awards

1. Click on Awards in the navigation pane. 2. Click the Add Award button.	
3. Enter the Award Name. 4. Enter a description of the award. 5. Select the status of the award. a) Active b) Inactive	

6. Click Save.	

Adding an Award to a Member's Record

1. Click on the Member's record from the Member Search screen. 2. Click on the Awards tab in the navigation pane.	
3. Click the +Add Award button. 4. Select the Enrollment Program Year from the drop-down menu. 5. Select the Award name from the drop-down menu 6. Enter the Award date. 7. Click the Save button.	

Groups

The groups area allows managers to create groups for members to be associated.

Creating a Group

1. Click on Groups in the navigation pane. 2. Click the + Add Group button.	

3. Enter in the Group Name. 4. Enter in a description of the Group. 5. Select the Delivery Mode of the Group 6. Select the group status. 7. Click the Add button.	

Projects

The Projects section, dependent upon Settings set by the System Manager may allow County Managers to create project aliases for existing institution created projects.

Creating a Project Alias

1. Click on the Projects tab in the navigation pane. 2. Click the +Add Project Alias to County button.	
3. Select the Institution Project name from the drop-down menu. 4. Enter the County Alias Name for the project. 5. Enter a description of the project 6. Enter the URL for information on the project. 7. Click the Save button to save the information or click Cancel to return to the previous screen without saving.	

Units

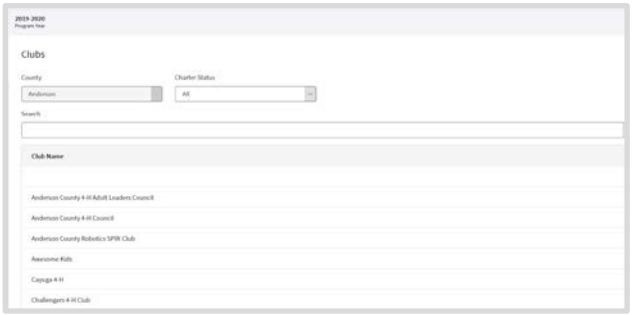
The Units area allows County Managers to view or modify Club and Group information. Clubs and Groups may be added by County Managers depending on the state's program settings.

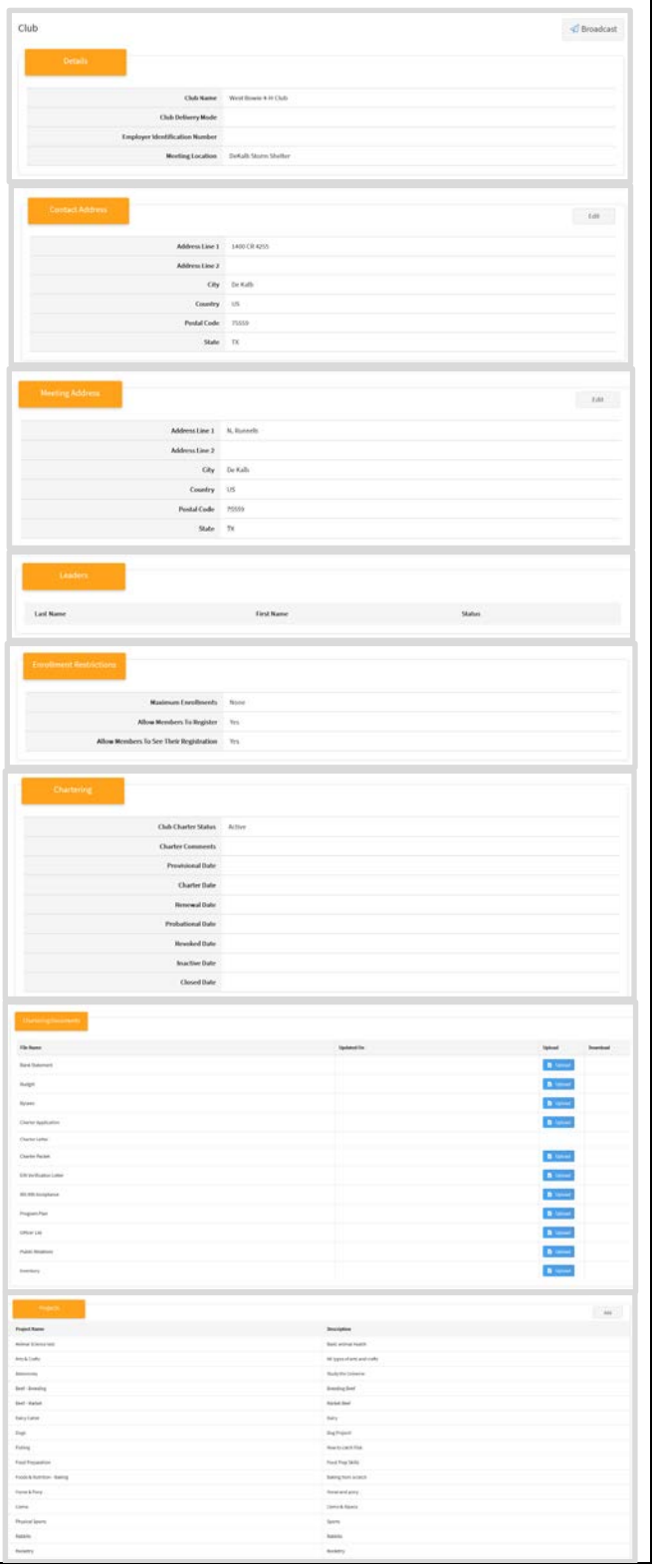
Adding Clubs

1. Click on the Units tab in the navigation pane. 2. Click the + Add Clubs button.	

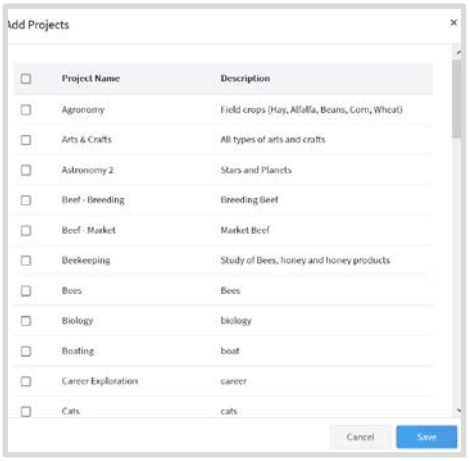
3. Enter the Club Name. 4. The County will default in as the current county the manager is accessing. 5. Select the Delivery Mode from the drop-down menu. 6. Enter the Club's EIN number. 7. Enter the Meeting location. 8. Enter the Contact 's address information. 9. Enter the Meeting Location's address information. 10. Click the Add button.	

Viewing and Modifying Club Information

1. Click on the Units tab in the navigation pane. 2. Click on any club name in the list to view their information. A) Details B) Contact Address C) Meeting Address D) Leaders E) Enrollment Restrictions F) Chartering	

G) Chartering Documents H) Projects	
3. Some categories of club information may be edited by county managers with the appropriate permissions. A) Details B) Contact Address C) Meeting Address D) Leaders E) Enrollment Restrictions F) Chartering G) Chartering Documents H) Projects 4. Click the Edit button next to the category you need to modify information. 5. Click the Save button when finished. 6. Click the upload button next to the Chartering document title to upload the file. 7. If the Institution has not selected that All Projects are available for all Clubs, to add projects to the list available for club members to select, click the Add button. 8. Select the projects from the list that club members should be able to select as associated with the club. 9. Unselect any projects that club members should not be able to select as associated with the club. 10. Click the Save button to save the project changes.	

Associating Projects with a Club

1. Dependent upon the Settings set by the System Manager, a County Manager may be able to set specific projects to be available for enrollment to members of a specific club. 2. Click on the Units tab in the navigation pane. 3. Select a Club from the list of units. 4. Scroll to the Projects area of the club. 5. Click the Add button.	
6. Check the box before each project name you want to be available for the club. 7. Click the Save button.	

Removing a Project Offering from a Club

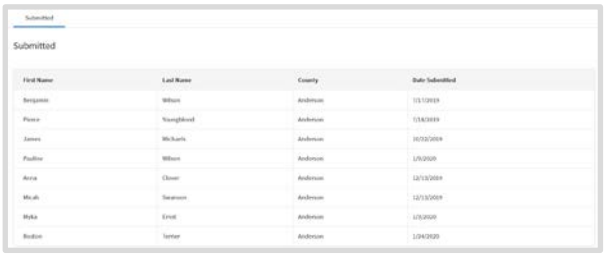
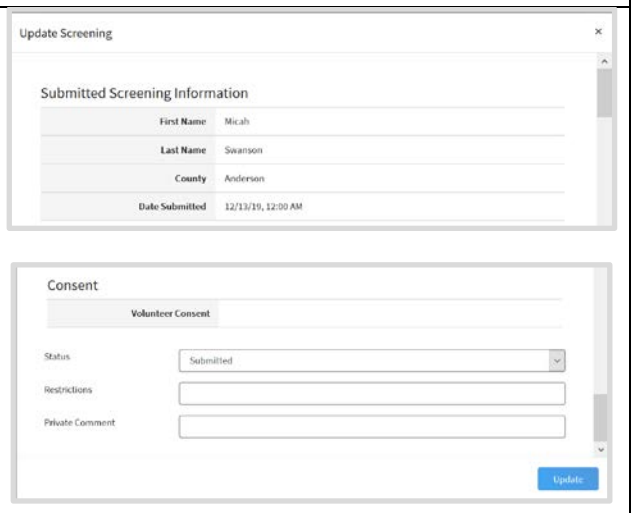
1. Dependent upon the Settings set by the System Manager, a County Manager may be able to remove a project from the list of projects available for members enrolled in the club. 2. Click on Units in the navigation pane. 3. Select the Club that you would like to remove a project from their list of project enrollment offerings. 4. Scroll to the Projects area of the club. 5. Select the project name you want to remove from the club project enrollment offerings.	

6. Click the Delete button to remove the project from the club's offerings or click Cancel to return to the Club screen.	

Screenings

The Screenings feature allows County Managers that have the appropriate permissions to review and approve Volunteer Screenings. This list will not be populated if screenings must be approved by Institution Managers.

Reviewing Submitted Volunteer Screenings

1. Click on Screenings in the navigation pane. 2. Click on the Volunteer's name to review the screening.	
3. Review the Submitted information configured for your Institution. 4. Click the Status drop-down menu to change the status of the screening. A) Approved B) Incomplete C) Rejected D) Restricted E) Submitted 5. If there are restrictions, type them into the Restrictions field. 6. If there are comments on the screening, enter them into the Private Comment field. 7. Click Update to save the updated information.	

Trainings

The Trainings section allows County Managers to search for members and the status of their trainings.

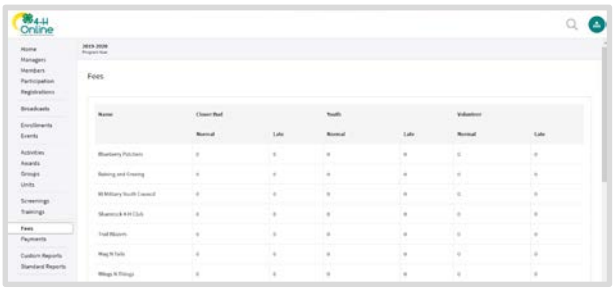
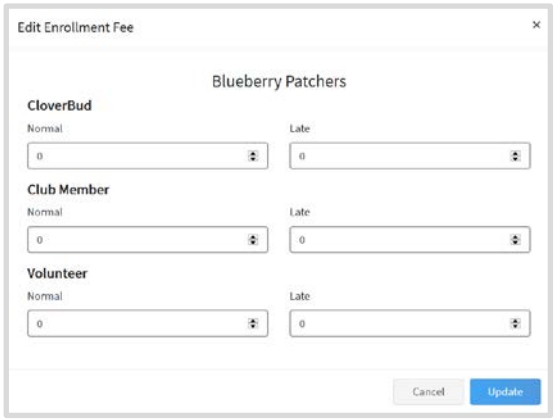
Training Search

1. Click on the Trainings tab in the navigation pane. 2. Enter your keyword, club, training status, and/or training start and end date selections. 3. Click the Search button. 4. The results of the search will appear below the search criteria. Click the Download Excel button to export the results to an Excel file.	

Fees

The Fees sections allows a County Manager to create Club fees for the current program year. This is dependent upon the System Manager settings and the permissions assigned to the County Manager.

Creating Club Fees

1. Click on the Fees tab in the navigation pane. 2. Click on a Club record. 3. Enter in the appropriate Normal fee amount for each Member role. 4. If there is a Late fee, enter the total amount fee the member role will pay for the club. 5. Click the Update button. 6. Repeat steps 2 – 5 for each club that has a fee. NOTE: Late Fees replace the normal fee amount on member invoices. Therefore, the Late Fee should be be a higher amount than the normal fee.	 

Payments

The Payments section allows a County Manager to search for payments by keyword, club, Start and End date, invoice number, payment number and/or payment status.

Payment Search

1. Click on Payments in the navigation pane. 2. Enter any combination of the following search criterion: keyword, club, Start and End date, invoice number, payment number and/or status. 3. Click the Search button. 4. Payment records meeting the search criterion will appear below the search filters. 5. Click the Download Excel button to export the list of search results to an Excel file.	

Custom Reports

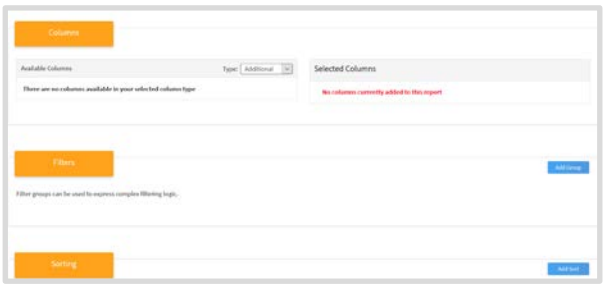
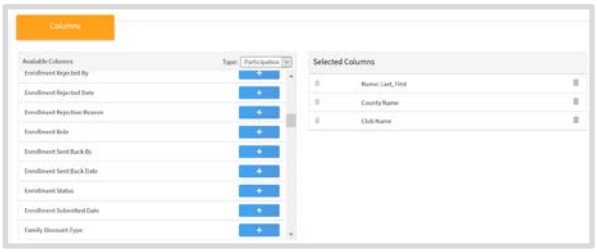
The Custom Reports area allows the County Manger to create reports. Managers may determine the columns that will appear, filter, and sort the data. Custom Reports can be downloaded in PDF and Excel formats, and can be used to send a broadcast email to the members included in the report results.

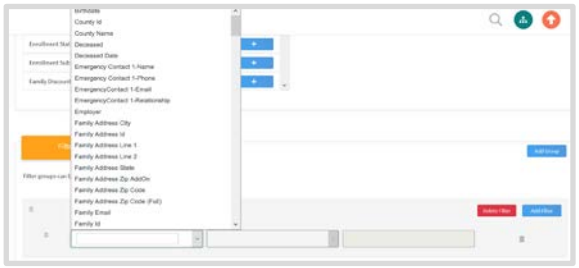
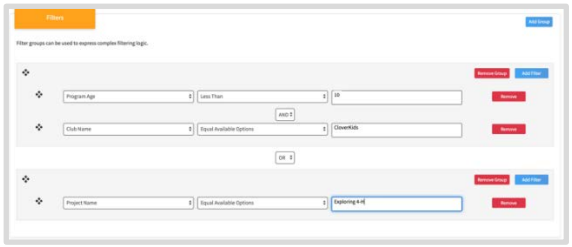
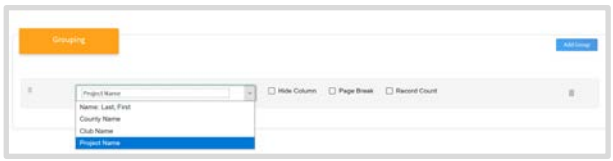
Creating a Folder for Custom Reports

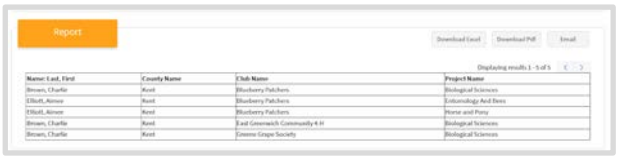
1. Click on the Custom Reports tab in the navigation pane. 2. Click the Add Folder button. 3. Enter the name of your new folder and click the Add button.	

Creating a Custom Report

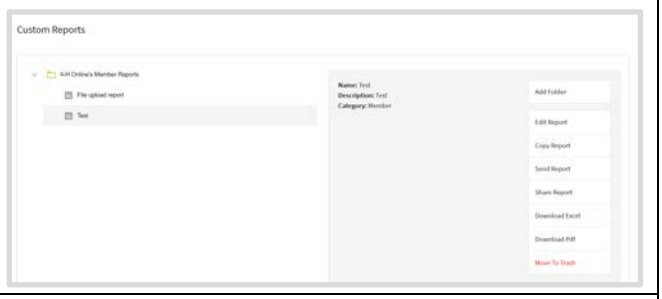
1. Click on the Custom Reports tab in the navigation pane. 2. View the available list of folders.	

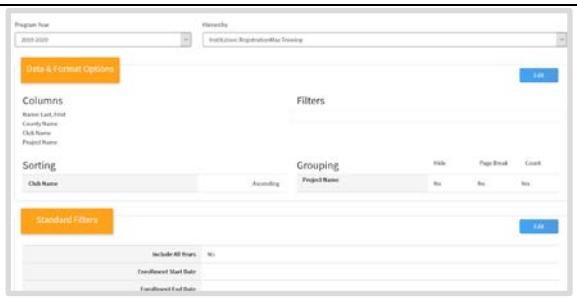
3. Click on the folder title for which you want to add a new report. 4. Click Add Report to create a new report in the selected folder.	
5. Enter the Report Name. 6. Enter a description of the report. 7. Enter the Excel Worksheet Title. 8. Click the Add button.	
9. To add columns to the report, click Edit next to the Data & Format Option heading. 10. Use the drop-down menu for the Available Columns Type to select the appropriate grouping of fields. A) Additional B) Animal C) Member D) Participation E) Payment F) Registration G) User Defined – Custom Questions asked of members when they enroll 11. Select the columns you need to add to the report by clicking the + symbol next to the field name. 12. You may change the Available Columns Type at any point to add columns from different areas to your custom report.	  
13. To add filters to the report, click the + Add Group button to begin the process. 14. Click the Add Filter button.	

15. Use the first drop-down menu to select the field you want to use as a filter. 16. Use the second drop-down menu to select the operator (options will vary depending on the field selected). 17. Enter a number, text, or select an available option for the filter. 18. Continue adding filters and/or groups of filters as needed. Select the "AND/OR" option to indicate how the filters should interact. 19. Click on the arrow icon at the left and drag it to a different position to re-order the filters.	 
20. To add a Sorting option, click the Add Sort button. 21. Select the data field you want to use to sort the report results. 22. Select the radio button that corresponds to how you want the data sorted. A) Ascending (A to Z, smallest to largest, etc.) B) Descending (Z to A, largest to smallest, etc.) 23. You may add more than one sort variable. The report results will be sorted by the first variable, then the second, etc.	
24. To add a Grouping option, click the + Group button. 25. Use the drop-down menu to select the variable you want to group records by, and then select whether to Hide Column, add a Page Break, and/or include a Record Count.	 
26. If needed, you may add Standard Filters to your report. Click the Edit button next to Standard Filters to begin adding one or more standard filters. The Standard Filters include: a) Include all years (Yes/No)	

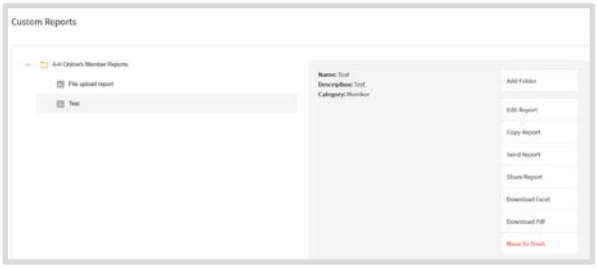
b) Enrollment Start Date c) Enrollment End Date d) Member Flagged (Yes/No) e) 4-H Age f) Member Roles (Youth/Adult) g) Member Program Year Statuses h) Member Participation Statuses i) Enrollment Roles (Volunteer, Club member, Cloverbud, Participant) ** Names of enrollment roles may vary by state 27. Click the Save button at the top of the page after selecting your standard filter options.	
28. As you build the report, the column headings and data will populate at the bottom of page in the Report area. 29. Use the Download Excel button to view the Excel format or use the Download PDF button to view the data in a PDF file. 30. Your browser settings will determine if the files automatically download, or if you will have to option to Open or Save the file. 31. It is highly suggested that you view the results before sending an email to the members listed on the report results. 32. Click the Email button to send a broadcast email to the members listed on the report results.	

Modifying Custom Reports

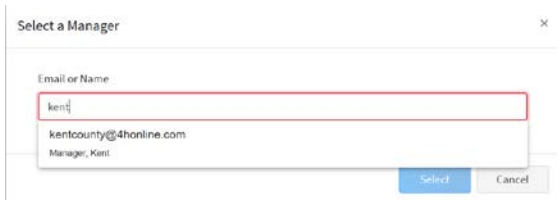
1. Click on Custom Reports in the navigation pane. 2. Click on the name of the folder containing the report you need to modify. 3. Click on the name of the Report that you want to modify. 4. Click the Edit Report button.	
5. Modify the Columns, Custom Filters, Sorting, Grouping, and/or Standard Filters as need. 6. Save the changes.	

7. View your report results before downloading the results or sending a broadcast email based on the report results.	

Sharing Reports with other Managers

1. Click on Custom Reports in the navigation pane. 2. Click on the > symbol to the left of the folder name to expand the folder. 3. Click on the Report name that you want to share. 4. Click the Share Report button. NOTE: The authorship of shared reports is retained by the original report creator.	

Sending Reports to Another Manager

1. Click on Custom Reports in the navigation pane. 2. Click on the folder that contains the report you want to send. 3. Click on the Report you want to send to another Manager. 4. Click the Send Report button.	
5. Enter in the Manager's email address or name. 6. Click on the appropriate account from the drop-down menu. 7. Click the Select button. NOTE: When sending a report to another Manager, a folder will be created in the recipient's list of custom report folders. The folder will contain the report and allow the recipient to modify the report as needed.	

Working with Reports Sent by Another Manager

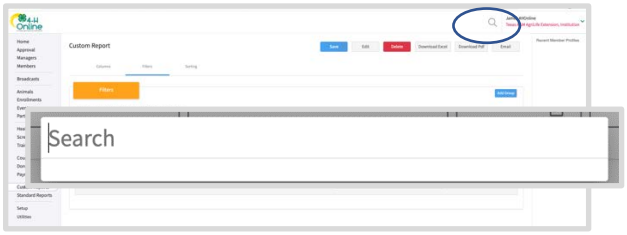
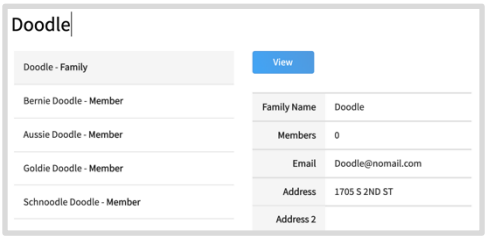
1. Click on Custom Reports in the Navigation pane. 2. View the list of folders. 3. Locate the folder titled “Reports from ___”, with the ___ being the name of the manager that sent you the report. 4. Click the > arrow next to the folder name. 5. Click the name of the report. 6. You may run or edit the report as if you created it yourself.	

Standard Reports

The Standard Reports section is currently under construction. Check back for updates!

Appendix A – Basic Navigation Tips

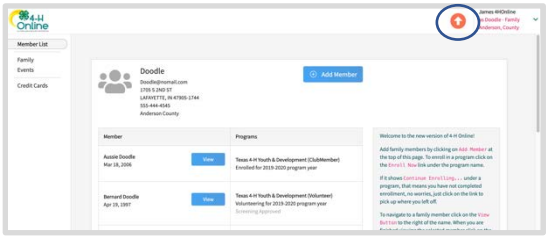
Global Search

At the top of every screen, you will see a gray magnifying glass. Click on this from any screen to search for a member, family, invoice, email address or event registration.	
Click on the record you would like to access and click View.	

Return to a Recent Member Profile

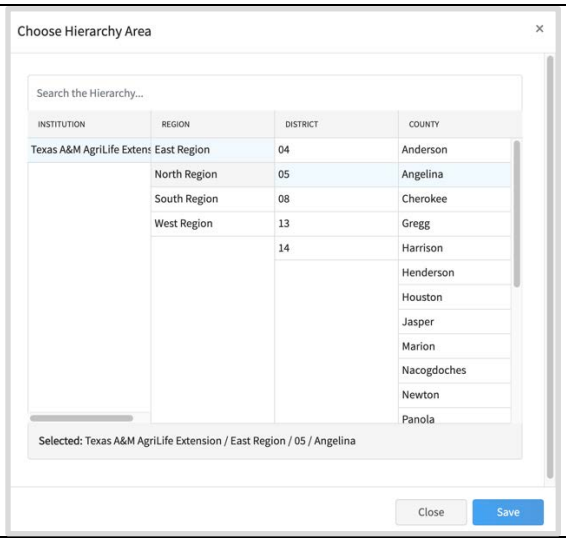
To return to a member's profile that you have recently viewed, click on the member's name in the right-hand pane titled Recent Member Profiles. If you do not see this pane, try to zoom out in your browser (ctrl + -). NOTE: You will not see this pane while you are logged in to a member or family profile.	

Return to the Manager Account

When you click to view a member from the Member Search or the Global Search, you will land in the family or member profile. Click the orange up arrow at the top right to return to the Manager account.	

Switch to a Different County

If you have been assigned permissions for more than one County or are a District,	

Region or Institution Manager, you may navigate to a different account for which you have permissions by clicking on the drop-down next to your name at the top right of the screen. Select Change Hierarchy.	
Navigate to the area of the hierarchy that you would like to switch to. Click Save. NOTE: You will only see areas for which you have permission.	

Appendix B – Glossary of Terms

Agent

Manager account

Batch

A group of volunteer screening forms processed at the same time.

Broadcast

Formerly termed Broadcast Email, this is the area in the system where managers may send messages to members.

Cloverbud

A member role for members who are younger than youth members (i.e. 5-8 years old). The age range for this role is set by the Institution.

Consent

Formerly termed, Authorization, this is an agreement, often legal, to which a member and/or parent/guardian must agree in order to participate in a club, project or event.

Coupon

A means to discount the amount of fees that a family or member will pay. In order for a coupon to apply, there must be a sufficient amount of donations in the fund with which the Coupon is associated to pay for the amount of the Coupon. Coupons can be created for a percentage of the enrollment or event fee. The percentage is always calculated off of the full fee.

Club-based Coupon – applies automatically to any enrollments in that Club

Coupon-Based – can be applied to any enrollments associated with the County or Institution that is associated with the fund selected for the Coupon.

Directory

A list of staff accounts with corresponding permissions for those staff members.

Donor

A person, business or organization that contributes a donation to a fund

Donation

Amount of money contributed to a fund

Enrollment

A member's registration in a program offered by the intuition (i.e. 4-H, Master Gardeners)

Fund

An area with which to associate donations, donors and coupons. Funds may be associated with a County or with the Institution.

Family-Based Discount

Discount applied to an enrollment based on the number of approved family members.

Status
Indicates the stage that a member record is in during the enrollment process (Not enrolled, Incomplete, Submitted, Awaiting Approval, Resubmitted, Payment Due, Screenings Pending Approval, Trainings Not Complete).

Global Search
A search feature located at the top of each screen allowing a search of any area of the system (look for the magnifying glass)

Hierarchy
The structure within an Institution including: Institution managers, Region managers, District managers and County managers. Counties are situated within Districts, Districts within Regions and Regions within the Institution. Permissions to access different levels of the hierarchy and different areas of the system are set here.

Hierarchy Admin
Formerly, Staff account with full permissions for that area of the hierarchy

Institution Manager
Formerly titled State Manager, the person(s) with this level of permissions has access all of the of the records in the Institution and is responsible for certain set-up responsibilities (i.e. Enrollment Fees)

Overnight Health Form
Extensive health information required for participants in overnight events or activities.

Permissions
Level of access granted to a staff member in a specific area of the program (None = staff member has no access to that area, Read = Staff member may only view records in that area, Write/Full = staff member may view and edit records in that area).

Primary Hierarchy Admin
Formerly, Primary Manager, this is a staff account with full permissions for that area of the hierarchy who is also the primary contact for that area

Profile
A member's record in the 4-H Online system. A member may or may not have an enrollment associated with the profile.

Program Year
The dates on which an enrollment year begins and ends.

Questions
Formerly termed Custom Fields, can be added to an enrollment or to event registration forms.

Registration Type
Used in Events, indicates different levels of participation (i.e. chaperone, delegate, etc.)

Role
Adult, Youth or Cloverbud (terms may vary by state)

Splash Image
Picture associated with an event that appears for families when they select to register for the event.

Standard Health Form
Basic health information requested from all members during the enrollment process.

Status
Indicates the stage that a member record is in during the enrollment or event registration process

Approved – all requirements have been met, reviewed and approved (similar to Active status in 4-H Online 1.0)

Awaiting Review – all requirements have been submitted and are ready to be reviewed

Declined and Blocked – enrollment has been declined and blocked the member will not be allowed to participate in the program this year

Deleted – enrollment has been deleted

Dismissed – enrollment has been rejected and volunteer will not be returning

Incomplete – members of this status have started enrollment but have not yet submitted

Not enrolled – formerly termed Inactive – members of this status have not begun enrollment for the current year

Participant – members of this status are not enrolled in a program, but may participate in events that are open to participants

Payment Due – members of this status are missing valid payment information

Resubmit – members of this status have resubmitted an enrollment that has been sent back

Screening Pending Approval – members of this status must have a volunteer screening approved prior to the enrollment being approved

Submitted – members of this status have submitted their enrollment, but have not completed all requirements for approval (i.e. a volunteer has submitted enrollment, but has not yet submitted a screening)

Trainings Not Complete – members of this status have not yet completed required trainings

System Manager
Formerly titled State Administrator, the person in this position is responsible for setting up the system and is the primary support contact for the Institution.

Unit
A Club or Group

Volunteer Type

A specific way in which a volunteer may participate (ie. Club Volunteer, Project Volunteer, Activity Volunteer). The volunteer type will determine the enrollment process for the Volunteer (ie. Club Volunteer will select a Club, Project Volunteer will select a Project).

Waiver

100% discount of fees that does not require money to be available in a fund to cover the cost of the waiver.

Appendix C – Manager Permissions

Role: Admin or Staff

Admin – Manager accounts designated as an Admin has full permissions. Program Settings that limit features or approval to System Manager or Institution Managers are not available to County Admins even if they have full permissions.

Staff – Manager accounts designates as Staff may have variable permissions. The permissions may be set to Write access for individual permissions, but other permissions may be set to Read or None as needed.

Primary: True or False

The Primary Admin is the main Contact person for that area of the hierarchy. Only 1 manager per hierarchy area may be set as the Primary Admin. Select True to set the Manager Account to be designated as the Primary Admin. The Primary Admin will receive notification emails regarding enrollments, event registrations and payment issues.

Animal ID – Approval

- Write – Manager can add or modify animal information to a member's record
- Read – Manager can see the animal information on a member's record but is not able to add or modify animal information
- None – Manager is not able to add, modify, nor view animal information tied to a member's record.

Club Chartering – Approval

- Write – Manager can modify a club's charter status
- Read – Manager can see the club's charter status but is not able to modify the charter status
- None – Manager is not able to change nor view the charter status of clubs

Connect – Broadcast Email

- Write – Manager can send broadcast emails to members and participants in the system
- Read –
- None – Manager is not able to send broadcast emails to members nor participants in the system. The Broadcast button is disabled on all applicable screens

Enrollment – Approval

- Write – Manager can add enrollments for a member and is able to approve enrollments submitted by members.
- Read – Manager can see member enrollments but is not able to add new enrollments nor modify existing enrollments on a member record.
- None – Manager is not able to view nor approve member enrollments

Enrollment – Clubs/Groups

- Write – Manager can add or modify club and group participation on a member enrollment.
- Read – Manager can view club and group participation on a member enrollment, but cannot add or change club or groups participation on a member enrollment.
- None – Manager is not able to view or change club or group participation on a member enrollment.

Enrollment – Clubs/Groups Create

- Write – Manager can create new clubs and groups and modify existing club and group information.
- Read – Manager can view clubs and groups information, but they are not able to create new nor modify clubs or groups information.
- None – Manager is not able to view clubs or group information.

Enrollment – Management

- Write – Manager can add or modify custom question responses and files on a member enrollment.
- Read – Manager can view custom question responses and files but are not able to modify the information.
- None – Manager is not able to view nor modify custom question responses or files.

Enrollment – Projects

- Write – Manager can add or modify project participation on a member enrollment.
- Read – Manager can view project participation on a member enrollment but are not able to add or change project participation on a member enrollment.
- None – Manager is not able to view or change project participation on a member enrollment.

Enrollment – Projects Create

- Write – Manager can create new projects** to be available for enrollment. **County Managers would only be able to create project aliases for existing projects in the Institution Project list.
- Read – Manager can view projects available for enrollment for the current program year, but are not able to add, remove or create project aliases for
- None – Manager is not able to view or change project participation on a member enrollment.

Events – Create

- Write – Manager can create new events and designate other Event Managers
- Read – Manager can view Events, but is not able to create new ones nor designate Event Managers
- None – Manager is not able to view or create events nor can designate Event Managers.

Events – Registrations

- Write – Manager can create new event registrations for members
- Read – Manager can view Events, but is not able to create new ones nor designate Event Managers
- None – Manager is not able to view or create events nor can designate Event Managers.

Family – Family Data

- Write – Managers may create new family profile or modify existing family profile information
- Read – Managers may view family profile information, but is not able to create new families nor modify existing family profile information
- None – Managers are not able to create new families, nor view or modify existing family profile information

Financial – Discounts

- Write – Manager can setup and modify family discounts for enrollment fees; Institution Managers with this permission creates the family discounts for Institution fees. County Managers with this permission creates the Family discounts for County fees.
- Read – Manager can review family discounts for enrollment that have been created for their area of the hierarchy but is not able to create or modify family discounts for enrollment fees.
- None – Manager cannot create, modify, or view family discounts that have been created for enrollment fees

Financial – Enrollment Fee Schedule

- Write – Manager can create and modify the enrollment fee schedule
- Read – Manager can review the enrollment fee schedule, but is not able to create nor modify the enrollment fee schedule
- None – Manager cannot create, modify nor view the enrollment fee schedule

Financial – Enrollment Fees

- Write – Manager can create and modify the enrollment fees
- Read – Manager can review the enrollment fee, but is not able to create nor modify the enrollment fee
- None – Manager cannot create, modify nor view the enrollment fee

Financial – Invoicing

- Write – Manager can create and modify invoices
- Read – Manager can review invoices, but is not able to create nor modify invoices
- None – Manager cannot create, modify nor view the invoices

Financial – Waive Fees

- Write – Manager can waive enrollment fees
- Read – Manager can view waived enrollment fees, but is not able to waive enrollment fees
- None – Manager cannot create, modify nor view waived enrollment fee

Manager – Management

- Write – Manager can manage the permissions of other managers in the same area of the hierarchy
- Read – Manager can view manager permissions for other managers in the same area of the hierarchy but is not able to modify the permissions of other managers.
- None – Manager cannot view or modify the permissions of other managers in the same area of the hierarchy.

Member – Health Data

- Write – Manager may create and enter member health information and modify a member's existing health information
- Read – Manager may view member health information, but is not able to modify existing member health information
- None – Manager is not able to view, enter nor modify member health information

Member – Personal Data

- Write – Managers may create new member profile or modify existing member profile information
- Read – Managers may view member profile information, but is not able to create new members nor modify existing member profile information
- None – Managers are not able to create new members, nor view or modify existing member profile information

Screening - Approval

- Write – Managers may view and approve screenings for volunteers
- Read – Managers may view volunteer screening information, but is not able to approve volunteer screenings
- None – Managers are not able to view volunteer screening information nor approve volunteer screenings