

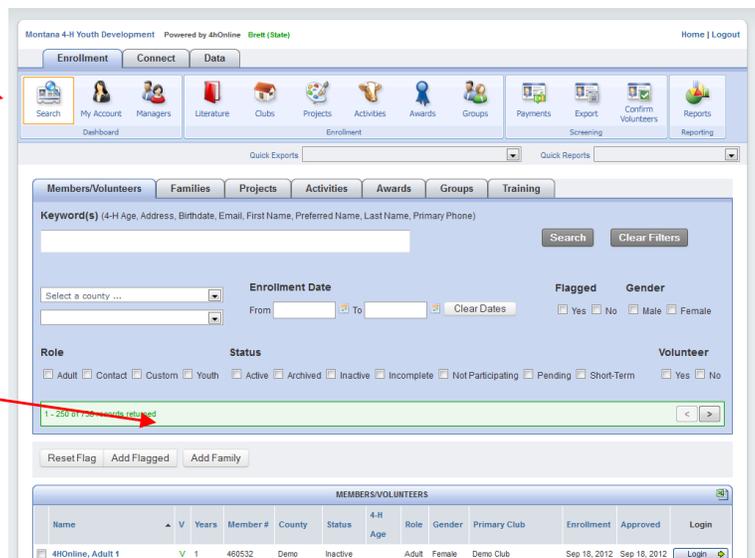
# Entering 4-H Member Data

If your county has chosen to enter all of the enrollment data rather than having members enroll themselves you will start here.

## 1 CREATE A FAMILY

Before entering any members or volunteers you will need to create a family. Even if only one member of that family is enrolled in 4-H, a family must be created before enrolling any individuals. It may be helpful to group your enrollment

After logging in navigate to the **SEARCH** screen.



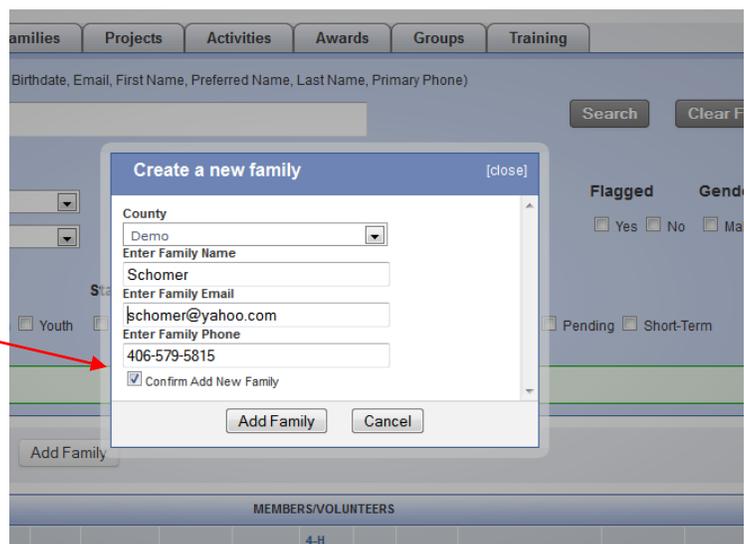
Click on **ADD FAMILY** to begin creating the family.

Select your County from the drop down menu.

Type in the family name, family email and family phone number.

Check "confirm add new family" then click "add family".

**NOTE:** It is best to ask on your county enrollment form what the family name should be listed as. If you are not sure because a family has more than one last name you can use a hyphenated name like Smith-Jones.



The next screen checks for duplicate families. If there is a family already entered that has the same LAST name you will see a warning.

If the family is a duplicate DO NOT CONTINUE adding the family. Click "Cancel" and return to the search screen to edit that family.

**NOTE:** If **this family** and **this family** are the same family DON'T continue! Click cancel.

If the family is **different** check "confirm add new family" and click "add family".

### Enter the "family information".

This should be the MAIN family contact information not information specific to an individual member.

**NOTE:** to take the guess work out you might want to add this "family information" to your enrollment form.

Click "Continue"

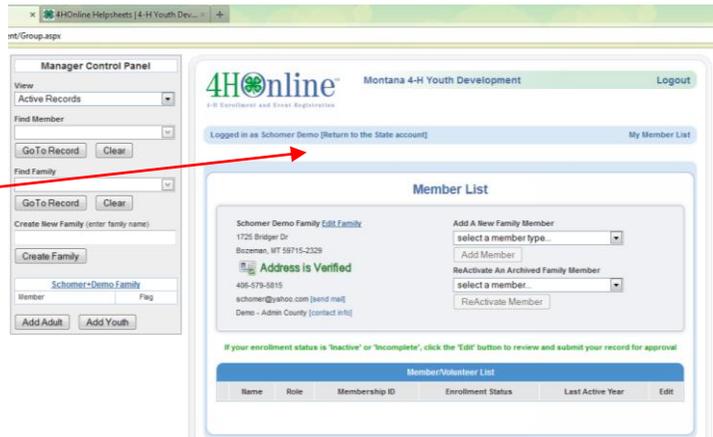
**Notice when you get to this point you are logged in as the "family" name.**

If at any point you want to return to the "home" screen you can either click on "[return to County account]" or in the top right corner of your screen you will see a box called "recent profiles". In that box you will see "C {your profile name}".

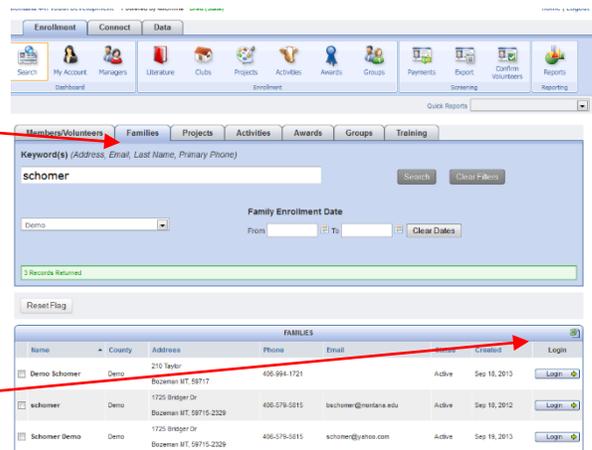
However if you do this before you click continue the family you are trying to create will not be saved.

## 2 ENTERING MEMBERS

You have successfully created a new family!  
Now you are ready to add members and/or volunteers to this family. After creating a family you will come to the screen below. **You can continue from here and begin entering members of THIS family.**



To add members from the home (search) screen click on the "families" tab



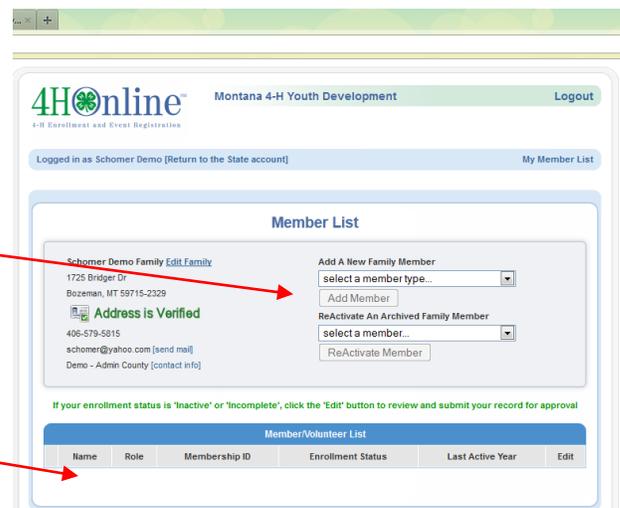
To find a particular family you can type the family name in the search field and click "search". This will show only the families with that name in the list below.

If you DO NOT search, all of your families will be listed.

To add members to a family start by clicking "login" next to the family record.

You are now logged in to the family record and can add members, adults or contacts to this family.

**Only ADULTS that are VOLUNTEERS should be entered.** Parent/guardian information will be entered on a youth member record. **Begin here**



Once you have entered members to this family, they will be added to the member list here. To edit an already created member record click "edit" to open that record.

**This is the youth information screen.**

The family information has already been entered.

If the youth member has an email address that is specific to them it can be changed from the family email address.

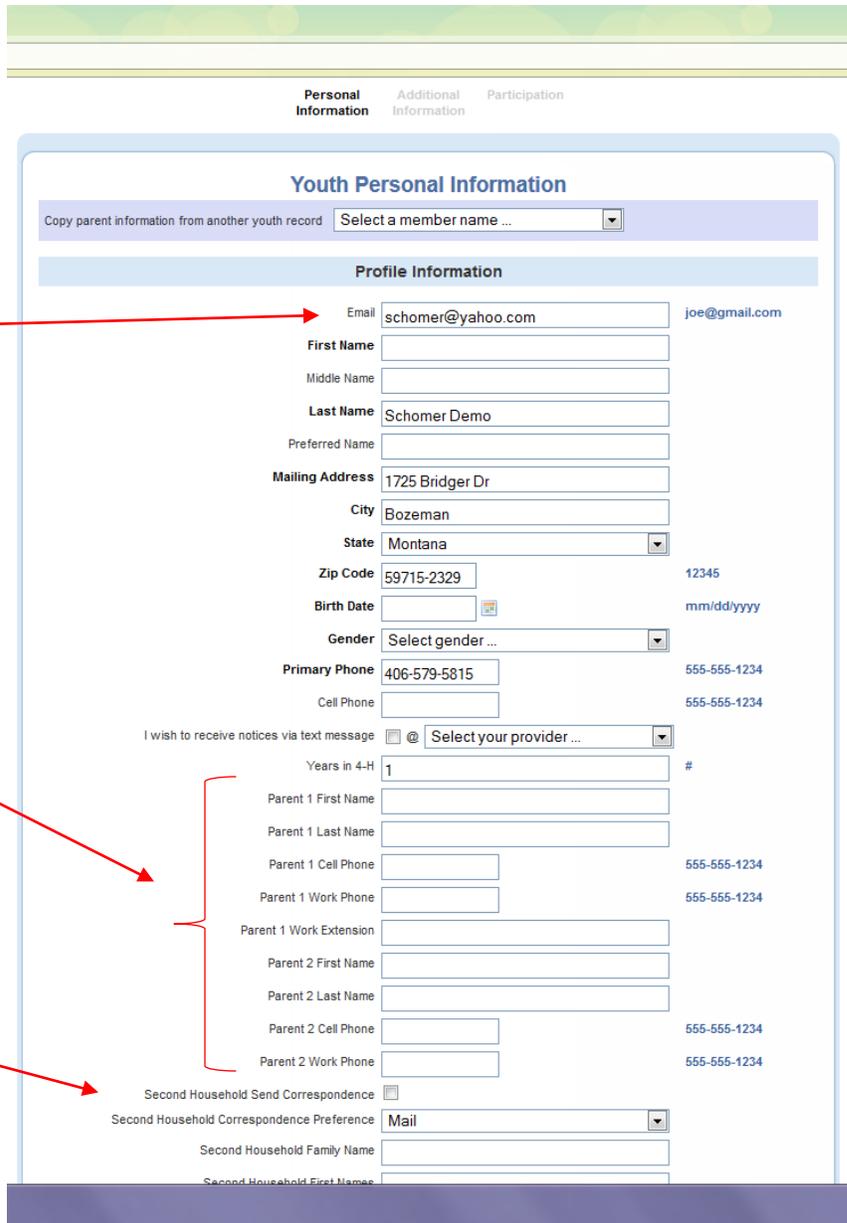
The field in **BOLD** are the required fields.

But it is important to collect on enrollment forms and enter as much data as possible.

Enter Parent/Guardian information here.

If there is a second postal address for this member that is different than the family address enter it as the "second household"

The bottom half of the screen is the demographic information about the member. Note that you can check any/all races that apply to the youth.



The screenshot shows the 'Youth Personal Information' form. At the top, there are tabs for 'Personal Information', 'Additional Information', and 'Participation'. Below the tabs is a dropdown menu for 'Copy parent information from another youth record' with the value 'Select a member name ...'. The main form is titled 'Youth Personal Information' and contains several sections:

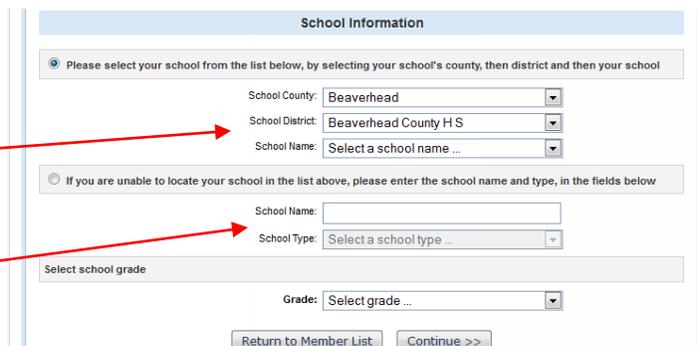
- Profile Information:** Includes fields for Email (schomer@yahoo.com, joe@gmail.com), First Name, Middle Name, Last Name (Schomer Demo), Preferred Name, Mailing Address (1725 Bridger Dr), City (Bozeman), State (Montana), Zip Code (59715-2329), Birth Date, Gender (Select gender ...), Primary Phone (406-579-5815), and Cell Phone.
- Text Message:** A checkbox 'I wish to receive notices via text message' and a dropdown for 'Select your provider ...'.
- Years in 4-H:** A dropdown menu set to '1'.
- Parent 1 Information:** Fields for Parent 1 First Name, Parent 1 Last Name, Parent 1 Cell Phone, Parent 1 Work Phone, and Parent 1 Work Extension.
- Parent 2 Information:** Fields for Parent 2 First Name, Parent 2 Last Name, Parent 2 Cell Phone, and Parent 2 Work Phone.
- Second Household:** A checkbox 'Second Household Send Correspondence', a dropdown for 'Second Household Correspondence Preference' (Mail), and fields for 'Second Household Family Name' and 'Second Household First Name'.

Red arrows point from the text on the left to the following fields in the form: the Email field, the Parent 1 Cell Phone field, the Parent 1 Work Phone field, and the Second Household Send Correspondence checkbox.

The School Information section asks for a county because this may be different than the 4-H County.

This list is pre populated.

If the school is not in the top list you can add the school here. *Use this for indicating homeschool.*



The screenshot shows the 'School Information' form. It has two radio button options:

- Selected:** 'Please select your school from the list below, by selecting your school's county, then district and then your school'. This option has three dropdown menus: 'School County' (Beaverhead), 'School District' (Beaverhead County HS), and 'School Name' (Select a school name ...).
- Unselected:** 'If you are unable to locate your school in the list above, please enter the school name and type, in the fields below'. This option has two input fields: 'School Name' and 'School Type' (Select a school type ...).

Below these options are fields for 'Select school grade' and 'Grade' (Select grade ...). At the bottom are 'Return to Member List' and 'Continue >>' buttons. Red arrows point from the text on the left to the 'School County' dropdown and the 'School Name' input field.

Select a grade and click “continue”.

The “ADDITIONAL INFORMATION” screen is where you can keep track of required forms and trainings. *If you have questions about the fields listed on this page contact the 4-H Center.*

**PLEASE NOTE:** The fields in yellow are only seen by you. If a member signs in to their own account they would only see the fields in purple on this page.

If you are entering all enrollment data (member do not login), you will collect the **Paper Code of Conduct and Media release form** and record:

- that the document was received
- the date it was received
- the consent given

These 2 forms are good for the entire 4-H year. You will not need to collect a form for each event or activity. However, **YOU MUST KEEP THEM ON FILE AND RECORD THEM HERE!**

In this section you can choose to record other possible forms and authorizations.

Personal Information    **Additional Information**    Participation

### Additional Information

Authorization Comments

Code of Conduct

Member and Parent/Guardian have read and agree with the above.

Member Signature

Guardian Signature

Document Received

Document Received Date  mm/dd/yyyy

Document Consent Given (Agrees)

Media Release

I have read, consent, and agree, individually and, as a parent or guardian of the minor named above, to the foregoing terms and provisions. I warrant that I am of full legal age and have every right to contract for the minor in the above regard.

Guardian Signature

Document Received

Document Received Date  mm/dd/yyyy

Document Consent Given (Agrees)

Document Consent Not Given (Does Not Agree)

Member Info

School:

Authorizations / Forms

Animal Project Form Received:

Horse Project Form Received:

Livestock Quality Assurance Received:

Livestock Quality Assurance Date:  mm/dd/yyyy

Food Safety Received:

Food Safety Date:  mm/dd/yyyy

Record Book Completed:

Record Book Completed Date:  mm/dd/yyyy

<< Previous    Clear Authorizations    Return to Member List    Continue >>

This is information you may need to come back to.

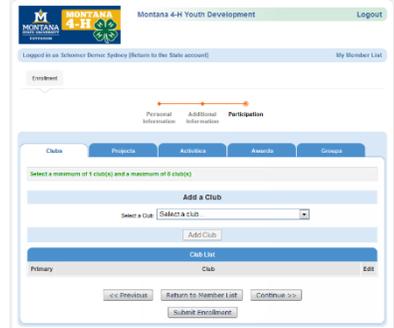
To return to this screen you will:

- login to family record
- click “edit” in the member list
- click continue at the bottom of the “youth information” screen.

**The “PARTICIPATION” screen is where you will:**

- select a club or clubs for this member
- select the projects they have chosen
- select state and county activities they participate in
- select state or county groups that they are members of

*This page will be an ongoing record of this member’s participation and can be used to keep track of helpful program information.*

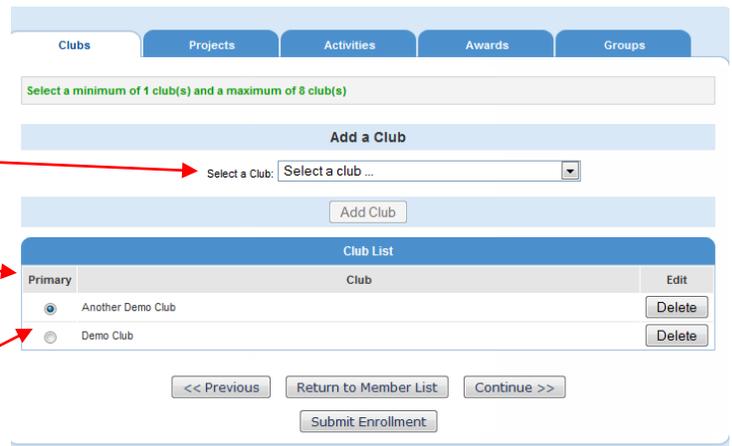


**Add club(s) to member record:**

Select a club from the drop down list. Only your county clubs will be listed. *See instructions for club setup.* Click **“add club”**.

Once the club has been added it will appear in the **“club list”**.

If the member is in more than one club repeat this. You can indicate which club is the **“primary”** club by clicking the button in the primary column.



If they ever drop from a club you will return to this screen and click the **“delete”** button to remove them from participation in that club.

**Add project(s) to member record:**

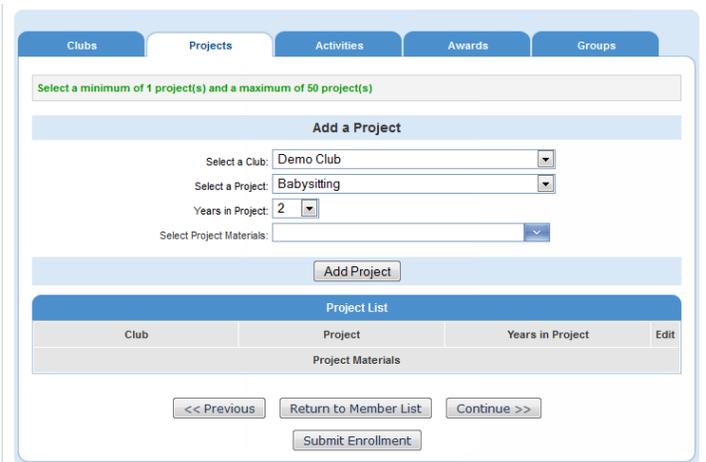
**“Select a Club”** from the drop down list. ONLY the clubs you have added to this member’s record in the previous screen will be available in this list.

**“Select a project”** see *instructions for managing projects.*

**“Select project materials”** you can use this field as a way to track project materials that need to be ordered.

Please note that checking the box does not automatically order curriculum.

When you have added all of a member’s projects click **“continue”**



## Add awards and activities to member record:

You can use these screens to keep track of a member's activities and awards.

See *activity management for information on how to add activities and awards.*

Both activities and awards can be added to previous years. They can also be project specific. If you check "project specific" only those activities associated with that project will appear in the list.

**This is a great way to track who has received an award or participation in an activity over a long period of time.**

Once you have added all of the **PARTICIPATION** information for this record (remember you will probably return to this screen to update throughout the year) click "submit enrollment".

You will see a review screen with all of the information you have entered and selected for this member. At the bottom you will see these options:

- **Accept Member:** if everything is entered and you want to make them an active member, click "accept member". You will still be able to edit this record, but their enrollment will be complete.
- **Send back to member:** if you are allowing members to complete their own enrollment and something is missing you can use this to send it back to them with a "message to member".
- **Delete Member:** if you want to delete the record completely and start over.
- **Cancel:** this will save everything you have entered and return you to the "member list".

Once you have clicked "ACCEPT MEMBER" their record will appear as "ACTIVE" in the member list. If you have **not accepted** them their record will appear as incomplete.

To continue adding member to THIS family use "add a new family member"

To return to the home screen click 'return to county account'.

Name	Role	Membership ID	Enrollment Status	Last Active Year	Edit
1) Lucy Schomer Demo	Youth		Incomplete	2012-2013	Edit
2) Sydney Schomer Demo	Youth	584068	Active		Edit