University *of* California
Agriculture and Natural Resources

4hOnline Guide For Tehama County

INSTRUCTIONS FOR

VOLUNTEER ENROLLMENT COORDINATOR (VEC)

Computer Requirements

You must use one of the following Web browsers:

- Microsoft Internet Explorer 6.0 or newer (for Windows users)
- Mozilla Firefox 1.5 or newer (for Windows and Apple users)
- Netscape 8.0 or newer (for Windows and Apple users)
- Google Chrome
- Apple's Safari and Mozilla Camino 1.5 or newer (for Apple users)
- You must enable cookies and Javascript.

Contents:

For more information about 4-H Enrollment, please contact:

4hOnline **https://california.4honline.com** Enrollment instructions: http://cetehama.ucanr.edu/4-H_Program/How_to_Join_4-H/ VEC Forms: http://cetehama.ucanr.edu/4-H_Program/Resources_Forms_and_Links/	**County 4-H Office** University of California Cooperative Extension **Tehama County 4-H** **1754 Walnut Street Red Bluff, CA 96080** **530-527-3101** **altucker@ucanr.edu** **slseverson@ucanr.edu** **FAX: 530-527-0917**

4hOnline Introduction

The 4-H Youth Development Program (4-H YDP) is in every county in California. 4-H is an organization where young people are given opportunities to build confidence, learn responsibility, and develop skills that will last them a lifetime. It's an organization where youth make friends and share interests, ranging from building robots to raising rabbits, signing web pages to landscape design. 4-H is where youth work together to make a positive difference in their community, and adult volunteers make a powerful difference in the lives of young people. Get involved in the 4-H community and make a lasting difference! Find more information about 4-H at www.ca4h.org the California 4-H Website.

4hOnline is a fully integrated program management system that brings together all levels of the 4-H experience. Whether it's a member logging in to manage their record, a unit organization adult volunteer printing mailing labels, or a county 4-H YDP staff approving a member's enrollment, 4hOnline brings the 4-H community together and keeps everyone involved.

The California 4-H Youth Development Program has implemented the 4-H Online enrollment process to help address the concerns of reduced 4-H YDP staff support in many of the county offices and to modernize the capabilities of 4-H in providing quick response to our clientele. 4hOnline is designed to allow 4-H members and adult volunteers to enroll on-line while maintaining contact with their club and county through the certification process. The integration of 4hOnline, the club and county are not removed from the enrollment process, but instead, are provided the time saving of not having to enter re-enrollment information every year. Re-enrollment can be renewed quickly online with minimal paper forms.

The collection of statewide enrollment data is managed in the Office of the Associate Vice President—Programs. Each county Cooperative Extension office is responsible for conducting proper enrollment procedures. Enrollment data provides a record of participation and shall be used to report program participation to ANR and USDA. Enrollment data may also be used in the evaluation of the 4-H YDP. Enrollment procedures vary depending on delivery mode and program category.

All 4-H members must annually complete enrollment forms or be listed on group enrollment forms. Data from these forms are incorporated into the 4-H computerized enrollment system. The member's parent or guardian must sign enrollment forms. 4hOnline families who use the system will be able to use e-signatures to enroll.

Each county must report enrollment annually to the Associate Vice President—Programs. County Cooperative Extension offices are responsible for maintaining enrollment data on all participants. 4hOnline is the statewide reporting software for the 4-H YDP. 4hOnline is used to report all participation in a 4-H program delivery mode or category.

4hOnline Terms

To use this guide and to work with the program it's important to learn some terms and concepts about the system. The following terminology will help explain some of the functions of the 4hOnline system:

Family Accounts: 4hOnline groups enrollments within a "Family Account." One family account is created to enroll youth and adults within that family. **ALL RE-ENROLLING FAMILIES ALREADY HAVE AN ACCOUNT**. *A new one should not be created.*

Login: To obtain access to information, a user must log into the system to obtain access, and then log out when the access is no longer needed. To log into the 4hOnline program you will need your email address and your password.

Usernames & Passwords: The username is the family email address. In order to log into the system or create a new family account, a valid email address must be used. Each family account must have a unique email address; they cannot be shared with any other family accounts. If a VEC enters data with paper enrollment into the 4hOnline system for families who do not have internet access, an email is not required. Passwords may be changed once you are logged into the system. Usernames & Passwords are Case Sensitive & require passwords to have 8 characters minimum.

Email: Electronic mail, often abbreviated as email or e-mail, is a method of exchanging digital messages. To setup a profile and enroll in California 4-H YDP an email address is required. janedoe@hotmail.com or johndoe@gmail.com are examples of email addresses. If a VEC enters data with paper enrollment into the 4hOnline system, for families who do not have internet access, an email is not required.

Club Passwords: Each Club has its own password, which is required to access the club information. The password is available from the 4-H office and can only be given to volunteers (VECs) that have been given access to the club account.

Roles: There are four roles that users can login to the 4hOnline system. Each role has different grades of authority.

1. Family - the basic role that most users will have. This will allow them to set up a profile with general demographic information and enter youth or adult enrollments.

2. County - all county 4-H YDP staff members will most likely use this role. They will have access to their county profiles, clubs, and groups.

3. State – Will have full access to all county information

4. Admin - For the designers and programmers.

Dashboard: The dashboard is the term used to describe the area where the various functions that sit atop the main page. The goal of the dashboard is to automatically give a user quick access to the main functions of 4hOnline. The buttons include:

Confirm members: This icon leads you to the page where all new or re-enrolled members and volunteers need to be approved by county staff members when an enrollment is pending. Before a member is considered active, Clubs then Counties must confirm the member.

Members: This icon leads you to the page where all active members and volunteers will be listed. 4hOnline uses the term for both members and adult volunteers.

Search: This page allows you to search for members and adult volunteers. When Members and Volunteers enroll there are various categories that we use including.

- Active - All forms have been submitted, Club has approved and County office has approved.

- Incomplete - Member or Volunteer has not completed the 4hOnline process.

- Pending - Member or Volunteer profile is waiting to be approved by Club or County office.

- Inactive - Member or Volunteer no longer active in the 4-H program.

Reports: A powerful function where many different types of reports may be generated. Some types of reports include:

Filters: In many of the search and report functions are options called filters. These filters allow the user to instruct the system to concentrate on certain criteria such as male or female, member or volunteer. Since most counties have hundreds if not thousands of records the filters allow users specific commands to find information

4hOnline Terms continued

faster.

Project Alias: Each county may create project titles for their projects. The UCCE 4-H Office is responsible for adding and maintaining aliases for project titles in 4hOnline. These project titles are called aliases because they are associated with the state project list. For example if a county has a specific project such as "Advanced Culinary Arts", it would need to be associated with the state project most like the specific project, in this case it would be "Foods and Nutrition".

Groups: California 4-H Youth Development (4-H YDP) engages youth in developmentally appropriate educational programs and activities that are organized through a variety of delivery modes. The deliveries are categorized and reported according to the degree of UC 4-H YDP involvement and intended outcomes of the experience. Some experiences may last an hour and others multiple years. Youth engaged in 4-H educational activities are enrolled individually or by group. Individual enrollment consists of an enrollment form, waiver of liability, and other forms completed by the participant. Group enrollment is recorded by the adult in charge of the activity and provided to the County 4-H Office. The UCCE 4-H Office is responsible for adding and maintaining groups in 4hOnline.
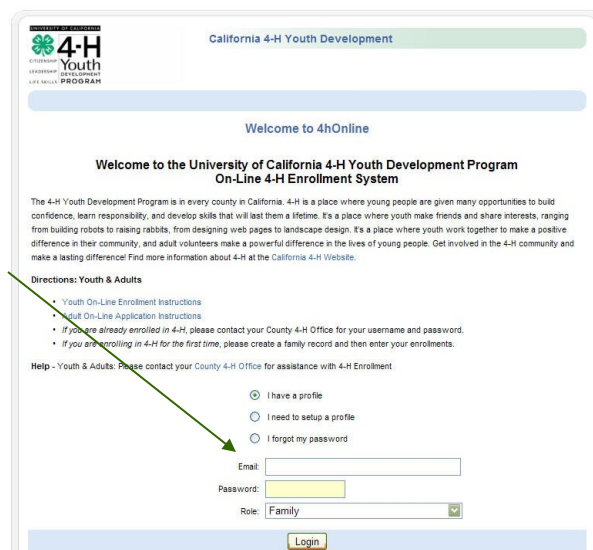
4hOnline VEC How To: Login to the Club Account

The Login screen has been updated; however the information displayed in graphic below remains accurate

STEP 1: 4-H ADULT VOLUNTEER LOGIN

4-H Adult Volunteers that have been authorized may access their club information

- **go to: https://california.4honline.com**
 (Don't forget the "s" in https:)

- First login to your family account using your family username (email address), your family password, and selecting a role of "family", as instructed during enrollment.
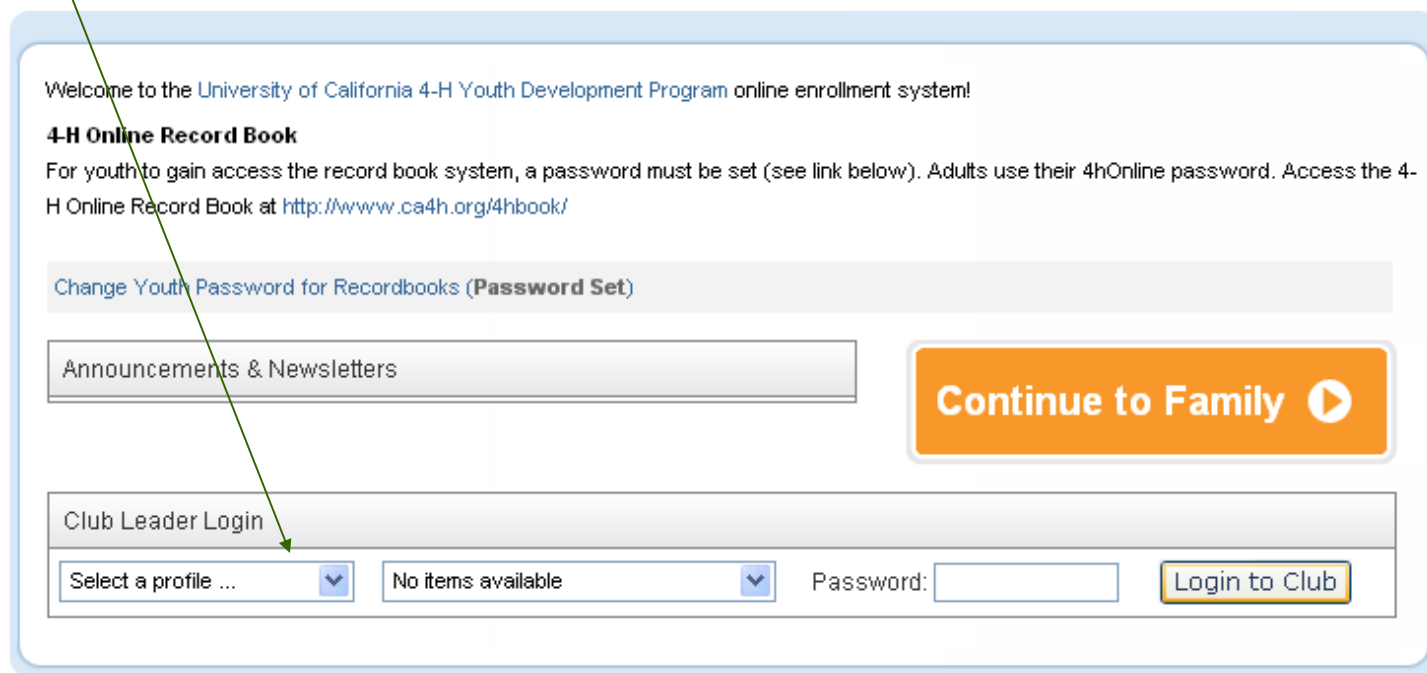
STEP 2: CLUB LOGIN

Once logged in under your family account, those 4-H adult volunteers who have been authorized to access their club data will be presented with a screen to choose from two options:

1. Continue to their Family Account or

2. Login to their club information. Use the drop down select a profile and club. Enter club password provided by the 4-H office.

4hOnline VEC How To: Confirm Members

The "Dashboard" appears when you have entered the club account. On the Dashboard are four options.

STEP 1: SELECT SCREEN To confirm members select the Confirm Members tab.

The Confirm Members Screen
This lists all of the 4-H youth and adults who are awaiting VEC approval. They have applied on-line.

STEP 2: SELECT MEMBER Click on the "Edit" button to view and approve or reject a record.

- <u>DO NOT approve members that do not identify your club as the Primary Club.</u> They may be participating in your club's project but will not be attending your club meetings nor paying their fee to your club.

STEP 3: REVIEW INFORMATION

Member Information Screen
- Review the information for all youth and adults for your club. If mistakes are found, families will need to enter the system and make changes AFTER their enrollment has been activated by the 4-H office.

STEP 4: CONFIRM or REJECT
- To approve the member or volunteer, click the "Confirm" button. **Note: wait to confirm members and volunteers until the club has received the required paperwork and their payment. All clubs will be billed for any "Active" members and volunteers.**
- To remove the member or volunteer from the 4-H Club roster, click the "Reject" button. <u>Do this only if the member has not completed the enrollment process and you have contacted them to confirm they are not going to participate.</u> Note: Only County 4-H Office may delete an entire enrollment record. Contact the office if the record should be deleted.

The 4-H office will:
- Activate the youth after being confirmed by the VEC
- Activate the Adult volunteers after the DOJ Live Scan is verified, training complete, etc.

4hOnline VEC How To: Enroll Families Without Web Access

Some members may not have on-line access; those members need be given time to enroll, given times to come into the office and enroll, or submit a completed paper enrollment packet. Packets are available from VECs.

Enrolling members from paperwork:

NEW FAMILIES:

STEP 1: Collect the fees and the completed enrollment packet paperwork, check for completeness.

STEP 2: From your club access, click on the "Search" button on the dashboard. The current Club Member list appears.

STEP 3: Click "Add Family"

STEP 4: Enter family information.
If they do not have an email, leave blank.
If you click "Add Family" and another family comes up (i.e. same last name, but different family), check box confirm and click "Add Family" to add NEW family.

STEP 5: Follow New Family Enrollment Guide Steps 4-6, ensuring all paperwork is complete and information given is entered. Enroll the member following "How to Enroll" instructions.
- Check boxes for only paperwork received.
- Add Club projects as indicated on the enrollment packet.

STEP 6: Select "Submit Enrollment" when complete.

To go back to club member list on search page, click "Club."

4hOnline VEC How To: Enroll Families Without Web Access

Some members may not have on-line access; those members need be given time to enroll, given times to come into the office and enroll, or submit a completed paper enrollment packet. Packets are available from VECs.
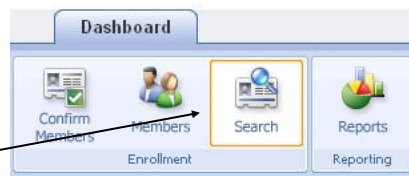
Enrolling members from paperwork:

RETURNING FAMILIES:

STEP 1: Collect the fees and completed paper enrollment , check for completeness.

STEP 2: From your club access, click on the "Search" button on the dashboard. The current Club Member list appears.

STEP 3: Select "Login" next to the member (or family member if adding a new family member)

Name	▲	V	Membership ID	Status	4-H Age	Role	Gender	Primary Club Title	Enrollment	Login
☐ Cook, Miles		V	299113	Inactive	17	Youth	Male	Placer County 4-H Leaders' Council	Feb 17, 2011	Login ➡
☐ Coyle, Mary		V	46740	Inactive	53	Adult	Female	Placer County 4-H Leaders' Council	Jan 11, 2010	Login ➡
☐ Crittender, Felicia		V	299190	Inactive	18	Youth	Female	Placer County 4-H Leaders' Council	Feb 18, 2011	Login ➡
☐ Eagan, Justin		V	198507	Inactive	27	Adult	Male	Placer County 4-H Leaders' Council	Jan 11, 2010	Login ➡
☐ Fawcett, Christina		V	299186	Inactive	12	Youth	Female	Placer County 4-H Leaders' Council	Feb 18, 2011	Login ➡
☐ Fink, Allen		V	317770	Inactive	65	Adult	Male	Placer County 4-H Leaders' Council	Apr 27, 2011	Login ➡
☐ Heindselman, Eileen		V	88599	Inactive	74	Adult	Female	Placer County 4-H Leaders' Council	Nov 01, 2010	Login ➡
☐ Henkel, Emily			156658	Inactive	17	Youth	Female	Placer County 4-H Leaders' Council	Sep 14, 2010	Login ➡
☐ Horrillo, Cory		V	127714	Inactive	34	Adult	Male	Placer County 4-H Leaders' Council	Nov 12, 2010	Login ➡
☐ Kao, Josephine		V	299117	Inactive	16	Youth	Female	Placer County 4-H Leaders' Council	Feb 17, 2011	Login ➡

The family account displays. In this screen you can add new family members or re-enroll returning members. Using the paperwork collected: (just as you did for your own family)

STEP 4: Enroll the member following "How to Enroll" instructions.
- Make contact information updates.
- Check boxes for only paperwork received.
- Add and/or deleted Club projects as indicated on the enrollment packet.

STEP 5: Select "Submit" when complete. This will take you back to the family account where you can select another member or…

STEP 6: Click on "Return to Club Account" at top of page to select another member or complete the confirm process.

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California 4-H Youth Development   Logout

Logged in as Stewart [Return to the Club account]   My Member List

4hOnline VEC How To: What is Submitted to the 4-H Office

After confirming members and volunteers, and any paperwork enrollments are entered, <u>turn in the following to the 4-H office</u> ASAP:

FOR MEMBERS THAT COMPLETED PAPER ENROLLMNET PACKETS:
- Enrollment Form with youth and parent/guardian signatures (page 5 & 6)
- Waiver of Liability (page 8)
- Parent Consent for Online Record Book (ORB) (page 7)

FOR VOLUNTEERS THAT COMPLETED PAPER ENROLLMNET PACKETS:
- Enrollment Form with Signatures (page 5 & 6)
- Waiver of Liability (page 9)
- Volunteer Self Disclosure (page 11)

All **Request for 4-H Program Fee Waiver/Reduction Forms** (if applicable), must be turned into the 4-H Office.
<u>Keep Medical Forms</u> and provide copies for each Project Leader. Medical forms should be on hand at all club and project meetings. DO NOT SUBMIT ENROLLMENT FEE PAYMENT at this time. Clubs are billed twice a year.

The 4-H Club Enrollment Log (see below) is no longer submitted to the 4-H office. Use it only for your club's record keeping.

4-H Enrollment Fee Log

CLUB: _____

MONTH: _____

Confirmed	Member Name	Date	Amount Paid	Check #	Cash	Youth	Adult	4hOnline Enroll OR Paper Enroll		Waiver	Medical	Self Discl. Form

** This form is for Club Leaders and VEC's to use and keep in club enrollment files. This form **does not** need to be turned into the 4-H Office.*

Club Enrollment Fee Log
Available in VEC binder and at http://cetehama.ucanr.edu/4-H_Program/Resources_Forms_and_Links/
Volunteer_Enrollment_Coordinator_VEC_Resources/

4hOnline VEC How To: View Member Enrollment Status

STEP 1: Click on "Members" button to view a quick <u>current year list</u> of member enrollment status. The list can also be downloaded to an Excel file.

PLEASE NOTE: This page will show you status of enrollments but not those you confirmed and have not been made "Active" by the 4-H county office.

Click Excel icon to download list.

County	Name	4-H Age	4-H Status	Type	Gender	Primary Club Title	Enrollment Date	Edit
PLACER	Coughran, Sharon		Active	Adult	Female	OPHIR 4-H CLUB	Jul 9 2011 7:32PM	Edit
PLACER	Mitchell, Cindy		Active	Adult	Female	Placer County 4-H Leaders' Council	Jul 6 2011 10:25AM	Edit

VECS can also Edit member accounts here to make adjustments to the account. This access must be granted by the 4-H office.

To get a more accurate report of membership, including status of enrolling volunteers, run a report using the Report function discussed on page 10.

4hOnline VEC How To: Run Reports (print or download)

Click on "Reports" button to open the reports pages.
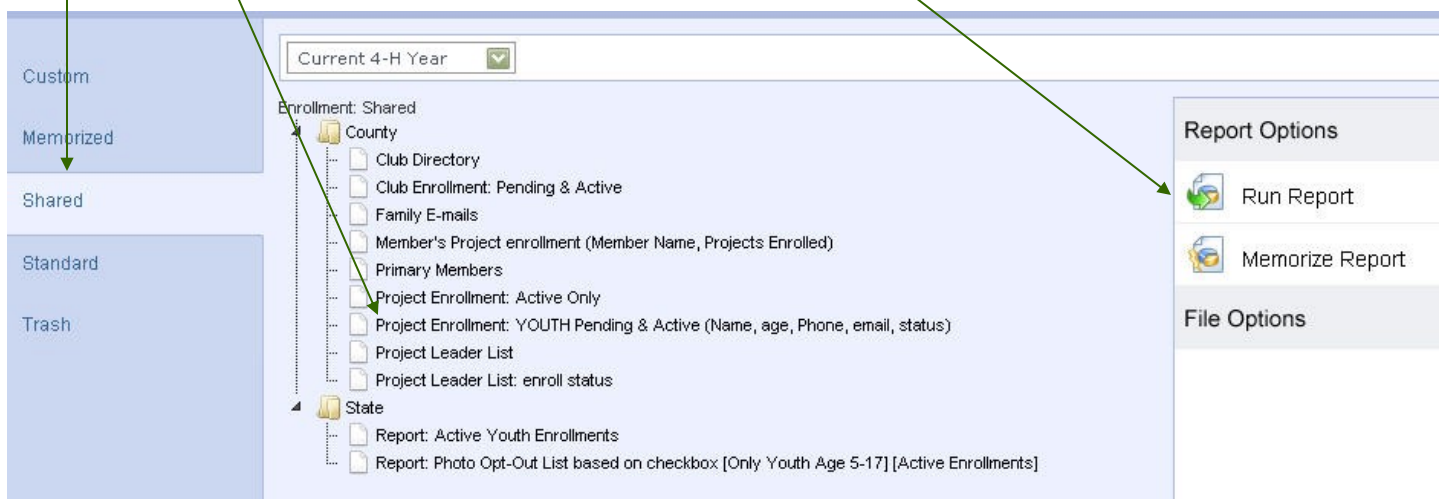
These are not applicable to Tehama County Clubs.

In this drop down, find a report of Projects your club is offering

There are sub-pages to Reports. Click one to bring up different reports.
- **Custom:** Reports created in your club.
- **Memorized:** Reports Saved
- **Shared:** Reports prepared at County or State Office that are "shared" for club use.
- **Standard:** Reports prepared by 4hOnline programmers for club use.

For reports to check pending and active members & project enrollments:

STEP 1: Select Shared Reports.

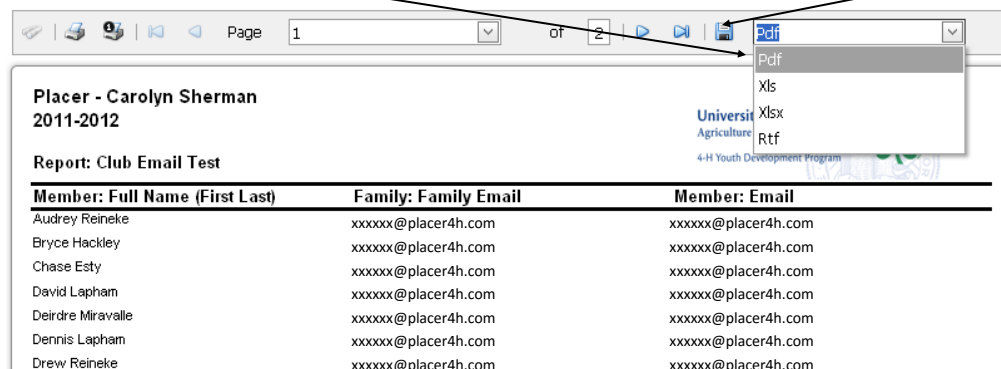**STEP 2:** Select a report you wish to open

STEP 3: Select a Report Option

• **Run Report:** After clicking on the desired report to select it, using the "Run Report" option will generate that report in a new window. From here you can print or download the report file.

• **Memorize Report:** After clicking on the desired report to select it, the "Memorize Report" option generates a copy of the report. This copy can be renamed and edited for more specific criteria. See more detailed instructions on page 11.

After selecting "Run Report" The report will page will appear. You can download the file or print it.

DOWNLOAD A FILE:

STEP 1: From the dropdown, select the format you wish to use.

Placer - Carolyn Sherman
2011-2012

Report: Club Email Test

Member: Full Name (First Last)	Family: Family Email	Member: Email
Audrey Reineke	xxxxxx@placer4h.com	xxxxxx@placer4h.com
Bryce Hackley	xxxxxx@placer4h.com	xxxxxx@placer4h.com
Chase Esty	xxxxxx@placer4h.com	xxxxxx@placer4h.com
David Lapham	xxxxxx@placer4h.com	xxxxxx@placer4h.com
Deirdre Miravalle	xxxxxx@placer4h.com	xxxxxx@placer4h.com
Dennis Lapham	xxxxxx@placer4h.com	xxxxxx@placer4h.com
Drew Reineke	xxxxxx@placer4h.com	xxxxxx@placer4h.com

STEP 2:

Select the "disc" icon

At this point, you may need to "enable pop-ups" to allow the download.

STEP 3:

Follow prompts for saving the file to your computer or opening it to view on the screen.

PRINT LABELS:

STEP 1: Under Standard Reports, select a Labels report, and click "Run Report."

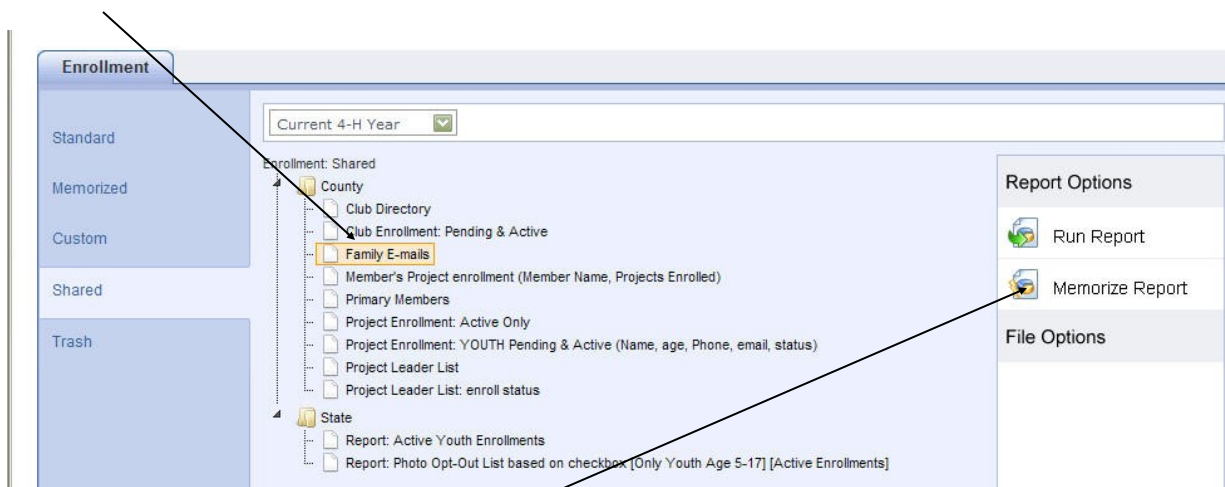**STEP 2:** Click the Printer Icon

>   **IMPORTANT TO NOTE:** this should open a PDF file. If it does not open a PDF file, follow the "DOWNLOAD A FILE" directions above to download a PDF, and then print the file.

STEP 3: Print using Avery Label #5160

- DO NOT USE YOUR QUICK PRINT OPTIONS; the printing will not line up with the label's perforations.

- Before printing the labels, open the Print Properties and set Page Scaling to "None", then print the report.
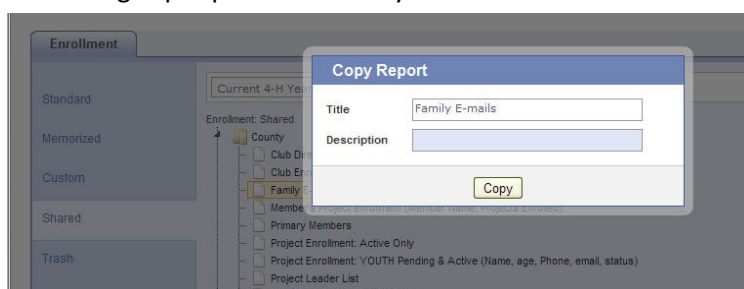
4hOnline VEC How To: Do More in Reports

STEP 1: Click on the Report you wish to use or alter.

STEP 2: Click on "Memorize Report"
This brings up reports created by our office and additional state formatted reports.
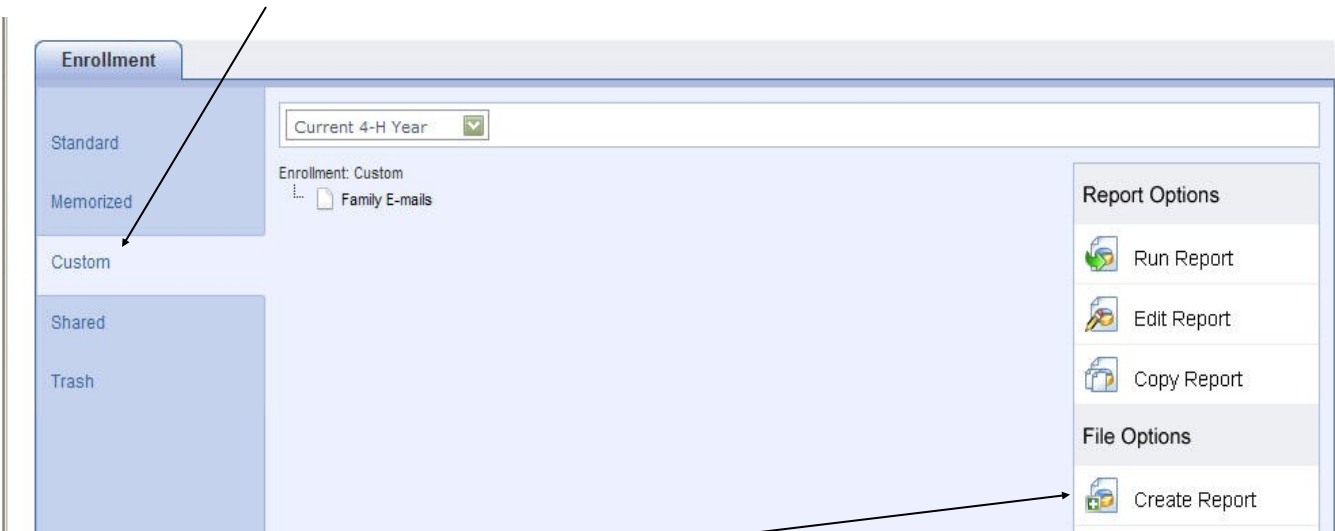

STEP 3: Enter a name for your report. Click on "Copy"

This will open the window that will allow you to make changes to what your report includes. See page 13 for information about customizing your reports.
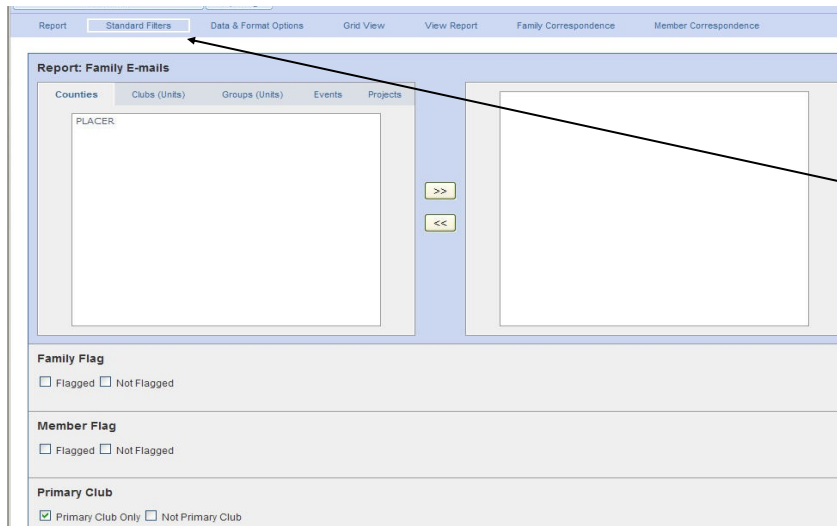
4hOnline VEC How To: Customize Reports

You can either open an existing report and make changes (using the following steps) or create a new report. To start with a new report:

STEP 1: Click on "Custom" in the left blue column

STEP 2: Click on "Create Report" on the right and follow the prompts to name your report. This will open to the "Report" page.

STEP 3: Update any information. Select the information you wish to add or remove, use the >> button to move a selected field to the box on the right, and then use the "Move Up" and "Move Down" buttons to choose the order of the selected data.

STEP 4: At the bottom of the screen, click "Save" before moving to Standard Filters or another screen. If you miss this step, any changes you make to the report will not be saved, and you will have to re-enter the settings and "save" again.

STEP 5: Click "**Standard Filters**":

Along the top of the are selectable tabs. Each tab enables various filters that may be selected for the report. **At Club level the only useful tab is "Projects"**

Use the >> button to move a selected field to the box on the right, and then use the "Move Up" and "Move Down" buttons to choose the order of the selected data.

The next steps are covered in the following pages from the California 4-H 4hOnline Manual:

This "new" report you just created will now be found in the "Custom" section of your reports list.

To export another excel report , select "Edit Report" and follow the above steps again.