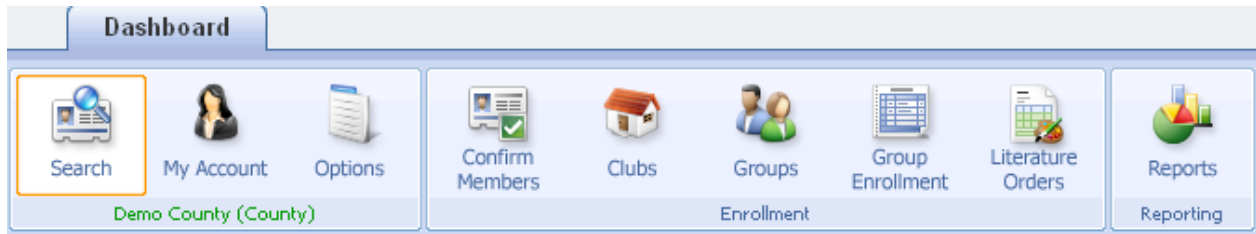


Colorado State University Extension

4HOnline Enrollment Manual

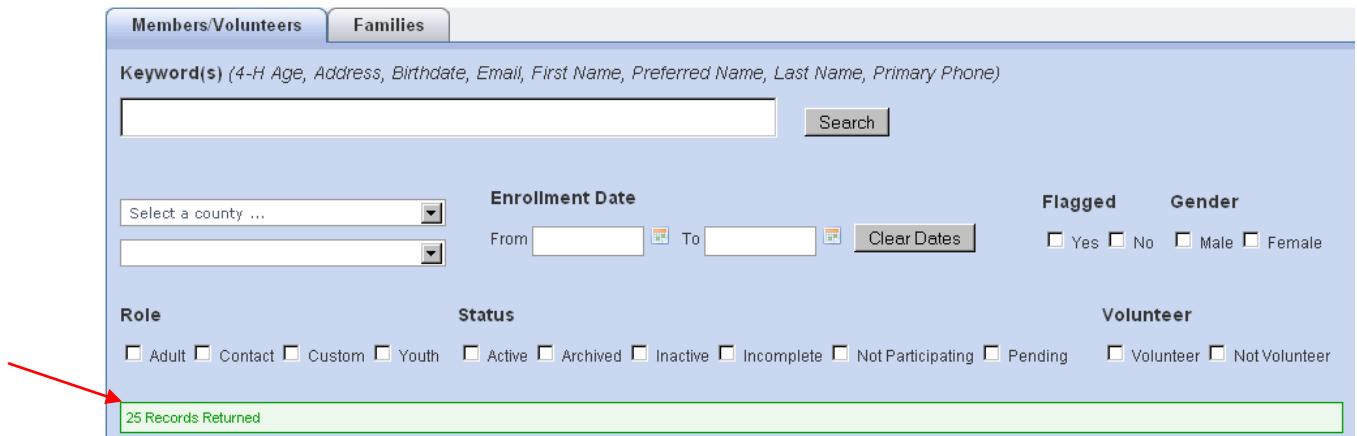
Dashboard Selection



This manual will cover each “Selection” on the Dashboard above.

Search Feature

Learning to use the search feature and understanding the options: When you first log on, the “Members/Volunteers” screen will show empty criteria fields. *Note: The green rectangle in the lower left hand corner indicates “25 Records Returned” This refers to all members and/or volunteers currently enrolled in “Demo County”.*



Enrollment data will be listed in order alphabetically, you can view the entries by scrolling down.

MEMBERS/VOLUNTEERS									
	Name	Membership ID	Status	4-H Age	Role	Gender	Primary Club Title	Enrollment	Login
<input type="checkbox"/>	Bauder, Buddy Jo	156793	Active	9	Youth	Male	Happy Grazing	10/26/2009	Login
<input type="checkbox"/>	Bauder, Daffy Duck	164493	Active	11	Youth	Female	Leisure Stroll	11/09/2009	Login

However, if you have larger numbers of entries it will group your entries as such.

[A](#), [B](#), [C](#), [D](#), [E](#), [F](#), [G](#), [H](#), [I](#), [J](#), [K](#), [L](#), [M](#), [N](#), [O](#), [P](#), [Q](#), [R](#), [S](#), [T](#), [U](#), [V](#), [W](#), [X](#), [Y](#), [Z](#), [0-9](#), [ALL](#)

MEMBERS/VOLUNTEERS									
	Name	Membership ID	Status	4-H Age	Role	Gender	Primary Club Title	Enrollment	Login

If you were searching for “active, adult, male volunteers” your search criteria would look something like this:

Members/Volunteers Families

Keyword(s) (4-H Age, Address, Birthdate, Email, First Name, Preferred Name, Last Name, Primary Phone)

Select a county ...

Enrollment Date From To Clear Dates

Role: Adult Youth Custom

Status: Active Inactive Incomplete Pending

Gender: Male Female

Volunteer: Volunteer Not Volunteer

2 Records Returned

In the lower left corner, it now reads “2 Records Returned” To see all records again, clear your criteria fields. The system doesn’t clear the values automatically for you, you will need to clear all the values before exiting or the criteria set will be what you see when you log in again.

From your “Search Criteria” screen, you can login to the Adult record by clicking the “Login” button.

MEMBERS/VOLUITEERS									
	Name	Membership ID	Status	4-H Age	Role	Gender	Primary Club Title	Enrollment	Login
<input type="checkbox"/>	Smith, Jonathan	154861	Active	0	Adult	Male	Leisure Stroll	10/20/2009	Login
<input type="checkbox"/>	Stone, Bill	155177	Active	0	Adult	Male	Leisure Stroll	10/21/2009	Login

Under the “Families Tab” search criteria fields are not as robust as you would be looking for a ‘family’ rather than an individual. See example:

Members/Volunteers Families

Keyword(s) (Address, Email, Last Name, Primary Phone)

bauder Search

Select a county ...

Family Enrollment Date From 10/01/2009 To 09/30/2010 Clear Dates

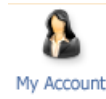
1 Records Returned

Reset Flag Add Family

FAMILIES							
	Name	Address	Address 2	Phone	Email	Created	Login
<input type="checkbox"/>	Bauder	1234 Happy Valley Road	Fort Collins CO, 80523	970-111-2222		10/20/2009	Login

You can login to the family record by clicking the “Login” button, to the far right of the screen.

Setting My Account



To update your your account information by clicking the [My Account](#) button. You can update all the information within this record. *Note: Under the organization title, please leave the county name displayed in your title. **Password hint** – Must be at least 8 characters in length and contain either a number or character.*

Profile Information	
Email	<input type="text" value="jbaud@mail.colostate.edu"/>
First Name	<input type="text" value="Joy"/>
Last Name	<input type="text" value="Bauder"/>
Organization Title	<input type="text" value="Demo County"/>
Address	<input type="text" value="4040 Campus Delivery"/>
City	<input type="text" value="Fort Collins"/>
State	<input type="text" value="Colorado"/>
Zip Code	<input type="text" value="80523"/>
Primary Phone	<input type="text" value="970-491-3887"/>
4-H County	<input type="text" value="Demo"/>

Password Management	
Current Password:	<input type="password"/>
New Password:	<input type="password"/>
Confirm New Password:	<input type="password"/>
<input type="button" value="Update Password"/>	

<input type="button" value="Save"/>	<input type="button" value="Cancel"/>
-------------------------------------	---------------------------------------

OPTIONS



Hide Projects

Click on the **Options** button. Click on the **Hide Projects** button in the upper right corner of the screen 'remove' a project from the drop down list as you begin to enter members/volunteers in projects. *Note: This is a handy feature for those counties that don't offer all projects on the list. Be sure to click the update button when all projects have been checked.*

Update

PROJECTS NOT AVAILABLE IN THIS COUNTY	
	Project Title
<input checked="" type="checkbox"/>	Beef Breeding, Leader
<input checked="" type="checkbox"/>	Beef Breeding, Member
<input checked="" type="checkbox"/>	Beef Market, Leader
<input checked="" type="checkbox"/>	Beef Market, Member

Click the "Options" button to return to the main options window. Under the "For Families" area, there are two options that you will need to check. *Note: The exception is if you want the feature turned on for families to enter their own profile information.*

For Families

Do Not Allow New Families to Create Their Record:

Do Not Allow Existing Families to Edit Their Record:

Under the "For Members" area enter one date in which to stop enrolling members into projects. You may leave the field blank. *Note: For counties with more than one date, the recommendation is to enter the earlier date and then change to the later date.*

Month and Day of Last Project Selection Date

Last Month for Member Project Selection:

Last Day for Member Project Selection:

Entering Family Information

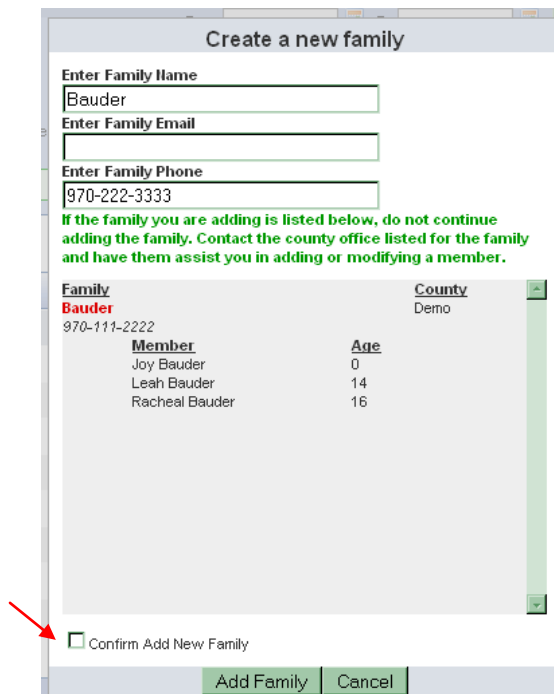
When you initially login to the system, you are automatically on the “Search” screen. To add a new family, simply click the “Add Family” button. *Note: Under the “Families” tab there is an “Add Family” button as well, however, it does not currently work. We hope to have this functional soon.*

When the “Add Family” button is clicked, the following screen will appear:



The screenshot shows a web form titled "Create a new family". It contains three input fields: "Enter Family Name", "Enter Family Email", and "Enter Family Phone". Below these fields is a checkbox labeled "Confirm Add New Family". At the bottom of the form are two buttons: "Add Family" and "Cancel".

Enter the family’s email (if they have one), last name and phone number. Click “Add Family” again and a “Confirmation” screen will appear. *Note: If it is a different family, click “Confirm Add New Family” box at the bottom and then click “Add Family” again. If there is a family with the same name, the following screen will appear.*



The screenshot shows the "Create a new family" form with the following data entered:

- Enter Family Name: Bauder
- Enter Family Email: (empty)
- Enter Family Phone: 970-222-3333

Below the input fields, a green message reads: "If the family you are adding is listed below, do not continue adding the family. Contact the county office listed for the family and have them assist you in adding or modifying a member."

Family	County
Bauder 970-111-2222	Demo

Member	Age
Joy Bauder	0
Leah Bauder	14
Racheal Bauder	16

At the bottom of the form, the "Confirm Add New Family" checkbox is checked, indicated by a red arrow. The "Add Family" and "Cancel" buttons are also visible.

Next, is the Personal Information screen. Fill in all necessary data and click the "Continue" button. *Note: E-mail is not required; all other fields are required.*

Logged in as Bauder [Return to the County account] My Member List

Family Information

Profile Information

Email joe@gmail.com

Last Name

Address

City

State

Zip Code 12345

Primary Phone 555-555-1234

Correspondence Preference

Are you in a Military 4-H Club

4-H County

Update member records with the same address

Password Management

Once data has been saved, enter Youth (Members) and Adults (if a Volunteer)

Member List

<p>Bauder Family Edit Family</p> <p>8998 Yellow Brick Road Fort Collins, CO 80523 970-222-3333 [send mail] Demo County County [contact info]</p>	<p>Add A New Family Member</p> <p><input type="text" value="select a member type..."/></p> <p><input type="button" value="Add Member"/></p> <p>ReActivate An Archived Family Member</p> <p><input type="text" value="select a member..."/></p> <p><input type="button" value="ReActivate Member"/></p>
---	--

Under the "Add a New Family Member" drop down list, click on the drop down arrow, select "Youth" and then click the "Add Member" button.

Information in the family record populates the “Youth Personal Information” screen. *Note: Fields that are in “**BOLD**” are required. Enter additional family information.*

Profile Information

Email	<input type="text" value="ljb@hotmail.com"/>	joe@gmail.com
First Name	<input type="text" value="Leah"/>	
Middle Name	<input type="text"/>	
Last Name	<input type="text" value="Bauder"/>	
Address	<input type="text" value="1234 Happy Valley Road"/>	
Address 2	<input type="text"/>	
City	<input type="text" value="Fort Collins"/>	
State	<input type="text" value="Colorado"/>	
Zip Code	<input type="text" value="80523"/>	12345
Birth Date	<input type="text" value="09/03/1995"/>	mm/dd/yyyy
Gender	<input type="text" value="Female"/>	
Primary Phone	<input type="text" value="970-111-2222"/>	555-555-1234
Cell Phone	<input type="text"/>	555-555-1234
Years in 4-H	<input type="text" value="7"/>	0-100
Parent 1 First Name	<input type="text" value="Joy/Troy"/>	
Parent 1 Last Name	<input type="text" value="Bauder"/>	
Parent 1 Cell Phone	<input type="text" value="970-222-8084"/>	555-555-1234
Parent 1 Work Phone	<input type="text"/>	555-555-1234
Parent 2 First Name	<input type="text" value="Racheal"/>	
Parent 2 Last Name	<input type="text" value="Bauder"/>	
Parent 2 Cell Phone	<input type="text"/>	555-555-1234
Parent 2 Work Phone	<input type="text"/>	555-555-1234
Parent 2 Address	<input type="text" value="1234 Is this working"/>	
Parent 2 Address 2	<input type="text"/>	
Parent 2 City	<input type="text" value="Loveland"/>	
Parent 2 State	<input type="text" value="Colorado"/>	
Parent 2 Zip Code	<input type="text" value="80538"/>	12345
Parent 2 Home Phone	<input type="text"/>	555-555-1234
Parent 2 Email	<input type="text"/>	joe@gmail.com
Second Household Send Correspondence	<input checked="" type="checkbox"/>	
Second Household Correspondence Preference	<input type="text" value="Mail"/>	
4-H County	<input type="text" value="Demo"/>	

USE AS NEEDED! No need to duplicate address if same as youth data. Check whether or not they receive correspondence. Select their “mail” or “email” preference. (If Address is different)



The bottom half of the screen allows you to fill in additional profile information about the member. Enter all information click the “Continue” button. *Note: Please enter in the “Military Service of Family” information if available.*

Volunteer

Select "Yes" if you serve in a leadership capacity in 4-H.

Examples for youth: Junior Leader, Club Officer, etc.

Examples for adult: Community Club Leader, Project Leader, etc.

Are you a Volunteer?: No: Yes:

Gender

Female:

Male:

Ethnicity

Check all that apply

Are you of Hispanic ethnicity?: No: Yes:

White:

Black:

American Indian or Alaskan Native:

Native Hawaiian or Pacific Islander:

Asian:

Prefer Not to State:

Residence

Farm:

Town under 10,000 and rural non-farm:

Town/City 10,000 - 50,000 and its suburbs:

Suburb of city more than 50,000:

Central city more than 50,000:

Military Service of Family

Family Member Military Service:

Branch of Service:

Branch Component:

School Grade

Grade:

Delete Member

Return to Member List

Continue >>

Click Continue to “Save” profile information.

This will take you back to the Family Member screen and WILL NOT SAVE current information.

Notice you are still logged in under the Youth account

Next, add "Additional Information" for our youth. *Note: Click the "Continue" button to save changes made.*

Logged in as Bauder: Leah [Return to the County account]

My Member List

Personal Information **Additional Information** Participation

Additional Information

School Listing

School: Rocky Mountain High School

Enter School Name here. Yes a report can be generated off this data. Remember to be consistent in School Names.

Additional Information

Photo Denial

Photo Denial:

Code of Conduct

Code of Conduct:

Member not in Good Standing

Member not in Good Standing:

Fees Paid

Fees:

Disabled

Disabled:

Additional Comments

Additional Comments: Looking into becoming a Jr Leader. Time commitment may be the issue.

Certification ID Information (if applicable)

Hunter Safety ID:

Hunter's Safety Certification Date:



mm/dd/yyyy

Horse Advancement Levels:

<< Previous

Return to Member List

Continue >>

Enter Club and Project Information

Use the drop down arrow under the “Add a Club” section to select a club then click the “Add Club” button. *Note: Once you add a club, the club name is removed from the drop down list. You can add another club or click the “Continue” button to save the information.*

The screenshot shows the 'Add a Club' form. At the top, there are tabs for 'Clubs', 'Projects', 'Activities', and 'Groups'. Below the tabs, there is a green text prompt: 'Select up to 5 club(s)'. A red arrow points from a callout box to this text. The callout box contains the text: 'Currently each member is allowed to be in up to "10 Clubs". This number can only be changed by the State Administrator.' Below the prompt is a light blue button labeled 'Add a Club'. Underneath, there is a 'Select a Club:' dropdown menu. The dropdown is open, showing 'Happy Grazing' (highlighted in green) and 'Leisure Stroll' (highlighted in yellow).

Notice the 1st Club selected is automatically assigned as the Primary Club. This can be changed by simply clicking the radio button.

The screenshot shows a table titled 'Club List'. The table has three columns: 'Primary', 'Club', and 'Edit'. There are two rows of data. The first row has a selected radio button (indicated by a red arrow from the callout box) in the 'Primary' column, 'Happy Grazing' in the 'Club' column, and a 'Delete' button in the 'Edit' column. The second row has an unselected radio button in the 'Primary' column, 'Leisure Stroll' in the 'Club' column, and a 'Delete' button in the 'Edit' column.

The “Projects” tab will automatically display the “Primary Club” for the member. To select another club use the drop down arrow.

The screenshot shows a 'Select a Project:' dropdown menu. The dropdown is open, showing 'Happy Grazing' (highlighted in green) and 'Leisure Stroll' (highlighted in yellow). Above the dropdown, there is a 'Select a Club:' dropdown menu with 'Happy Grazing' selected.

Use the drop down arrow to locate and select a project for each member. Enter the number of years the member has been enrolled. Choose “Select Project Materials” if desired by checking the box. Click the “Ok” button when finished and then click the “Add Project” button.

The screenshot shows the 'Add a Project' form. It has a light blue header with the text 'Add a Project'. Below the header, there are several fields: 'Select a Club:' with a dropdown menu showing 'Happy Grazing'; 'Select a Project:' with a dropdown menu showing 'Dog Member'; 'Years in Project:' with a dropdown menu showing '1'; and 'Select Project Materials:' with a dropdown menu. Below the 'Select Project Materials:' dropdown, there are three checkboxes: 'Canine Connection', 'Leading the Pack', and 'Wiggles and Wags'. At the bottom of the form, there is a 'Project:' label and two buttons: 'Ok' and 'Cancel'.

Click the "Continue" button to save the project information or if you are finished

Project List			
Club	Project	Years in Project	Edit
Project Materials			
Happy Grazing	Dog, Member	1	<input type="button" value="Edit"/>
Canine Connection, Leading the Pack, Wiggles and Wags			

Click to "Save" and move to the next section, Activities

OR

Click Submit Enrollment to "Save" and proceed to "Accept Member"

Note: You can click the "Submit Enrollment" button. This will provide an "overview" of all data entered on the current member.

Logged in as Bauder: Buddy Jo [Return to the County account]
My Member List

Personal Information
Additional Information
Participation
Confirm

Profile Information

Notice there isn't an ID or Status listed yet. See bottom of screen for options.

Buddy Jo Bauder - Youth
record created: 10/26/2009 12:17:02 PM

Membership Id

Membership Status

Message to member (optional)

This will confirm member status to active and generate an ID number. If an email address was entered. The member will receive an email confirmation. You may also create a personal message to the member using the box above.

Clicking the “Accept Member” button will return you to the “Member List” screen where the youth entered will now have an ID number and be active.

Logged in as Bauder [Return to the County account] My Member List

Member List

Bauder Family [Edit Family](#)

8998 Yellow Brick Road
Fort Collins, CO 80523
970-222-3333
[\[send mail\]](#)
Demo County County [\[contact info\]](#)

Add A New Family Member

select a member type...

ReActivate An Archived Family Member

select a member...

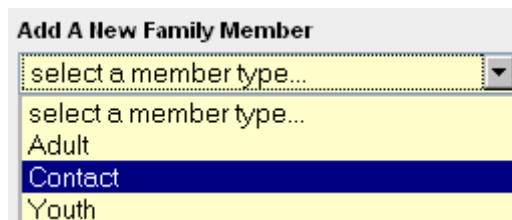
If your enrollment status is 'Inactive' or 'Incomplete', click the 'Edit' button to review and submit your record for approval

Member/Volunteer List						
	Name	Role	Membership ID	Enrollment Status	Last Active Year	Edit
1)	Buddy Jo Bauder	Youth	156793	Active	2009-2010	<input type="button" value="Edit"/>

Contact Entry

Some counties prefer to keep a mail list of County Commissioners, FFA Members/Leader, etc. but we don't want them to count toward the ES237 report. To create a contact is similar to creating a Youth or Adult but a lot less data entry. You would need to create a “Family” account prior to entering the contact data.

Under “Add a New Family Member” select the drop down arrow and select “Contact” and click “Add Member”.



Everything in **Bold** is required. Click "Continue" to save.

Contact Personal Information

Profile Information

Email	<input type="text"/>	joe@gmail.com
First Name	<input type="text" value="Troy"/>	
Last Name	<input type="text" value="Bauder"/>	
Job Title	<input type="text"/>	
Address	<input type="text" value="1234 Happy Valley Road"/>	
City	<input type="text" value="Fort Collins"/>	
State	<input type="text" value="Colorado"/>	
Zip Code	<input type="text" value="80523"/>	12345
Gender	<input type="text" value="Male"/>	
Primary Phone	<input type="text" value="970-111-2222"/>	555-555-1234
Cell Phone	<input type="text"/>	555-555-1234
4-H County	<input type="text" value="Demo"/>	

You can they select the "Group" listing they would be connected with and click "Add Group" and "Continue". This will return you to the Member List screen.

Note: Adding groups will be covered in another section.

Groups

Add a Group

Select a Group:

Member List

Bauder Family Edit Family 1234 Happy Valley Road Fort Collins, CO 80523 970-111-2222 [send mail] Demo County County [contact info]	Add A New Family Member <input type="text" value="select a member type..."/> <input type="button" value="Add Member"/> ReActivate An Archived Family Member <input type="text" value="select a member..."/> <input type="button" value="ReActivate Member"/>
--	---

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

Member/Volunteer List						
	Name	Role	Membership ID	Enrollment Status	Last Active Year	Edit
1)	Jerry Bauder	Contact		Active		<input type="button" value="Edit"/>
2)	Joy Bauder	Adult	154797	Active	2009-2010	<input type="button" value="Edit"/>
3)	Kaden Bauder	Youth		Pending		<input type="button" value="Edit"/>
4)	Leah Bauder	Youth	154845	Active	2009-2010	<input type="button" value="Edit"/>
5)	Racheal Bauder	Youth	154847	Active	2009-2010	<input type="button" value="Edit"/>
6)	Troy Bauder	Contact		Active		<input type="button" value="Edit"/>

Contacts are NOT given an ID.