COLORADO STATE UNIVERSITY
EXTENSION

This document is a work in progress as features are added, the guide will be updated.

4-H Online
4-H ENROLLMENT AND EVENT REGISTRATION

County Manager Guide

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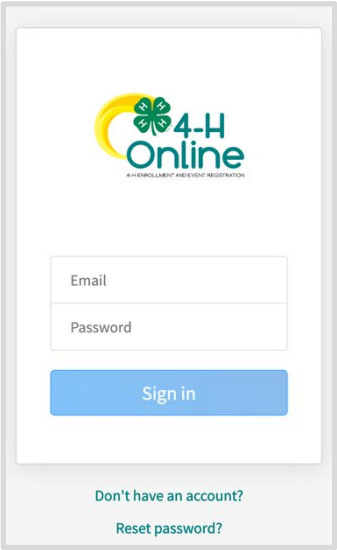
County Manager Sign-in

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 co.4honline.com.
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. If you have any issues, contact Joy Bauder directly.

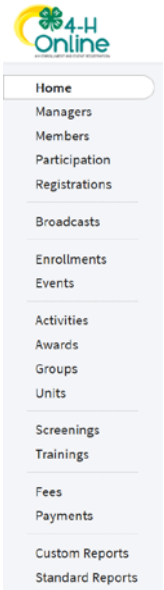


Navigation Pane

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.

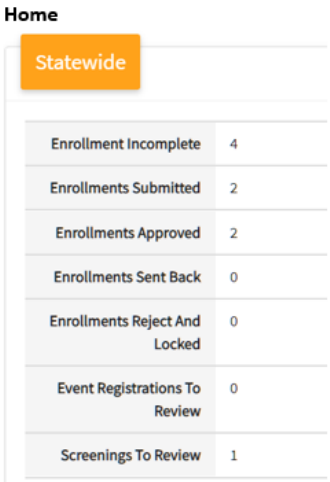


Home Screen

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.

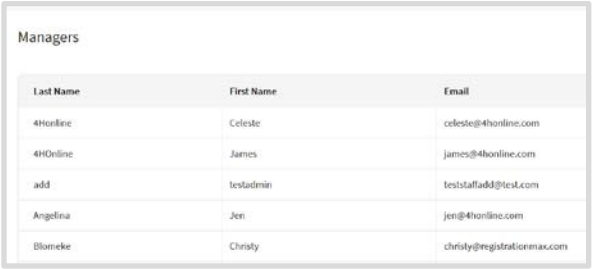


Managers

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

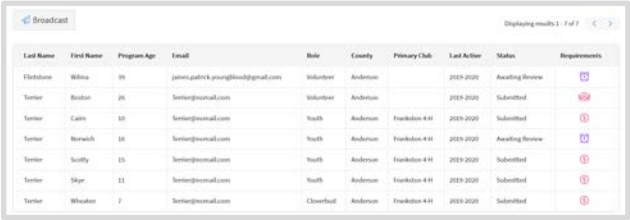
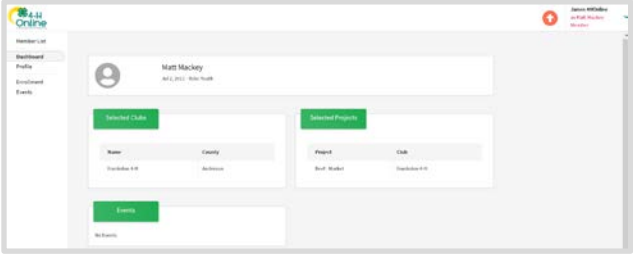
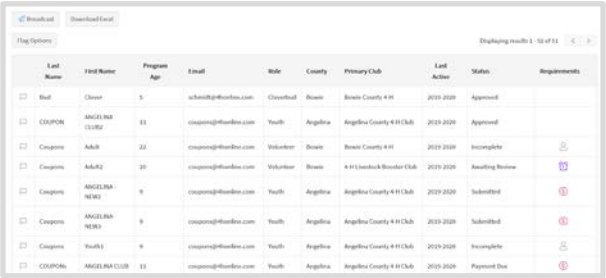
1. Click on the Managers tab in the navigation pane.
2. View the list of Managers that have been setup for the County.



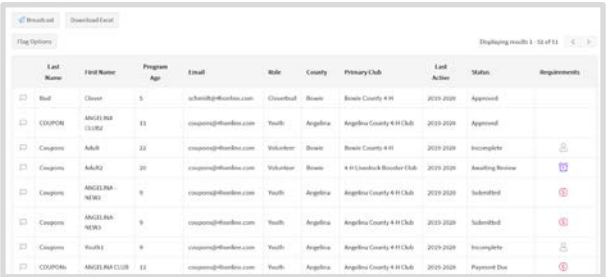
Members

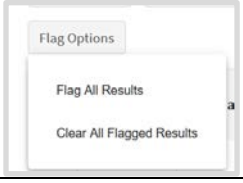
The Members area allows the County Managers to search for members, view the member status, check on requirements that are not yet met, view the enrollment information and access family and member profiles. The Members area looks at members across all program years.

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

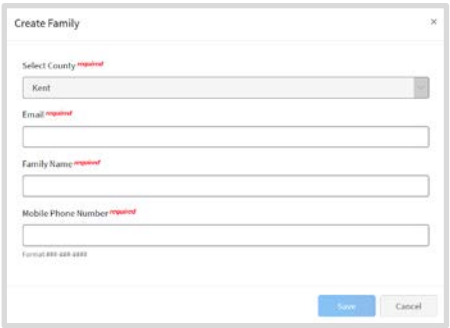
1. Members may be flagged on the Member Search screen. 2. Flag records one record at a time by clicking the Flag icon next to the Member record. 3. Click the Flag Options button and select Flag All Results to flag the records in bulk.	

Clearing Flags from Member Records

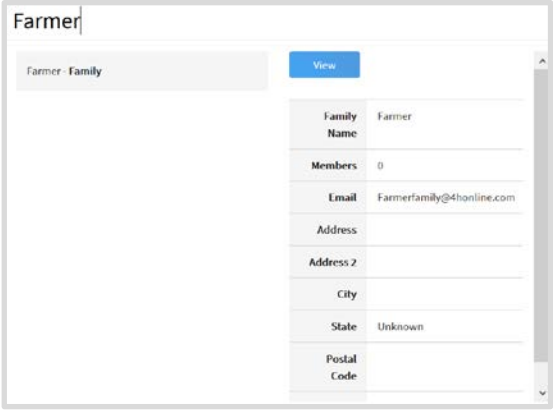
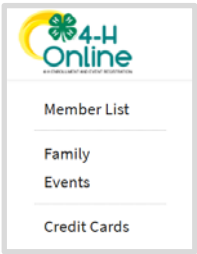
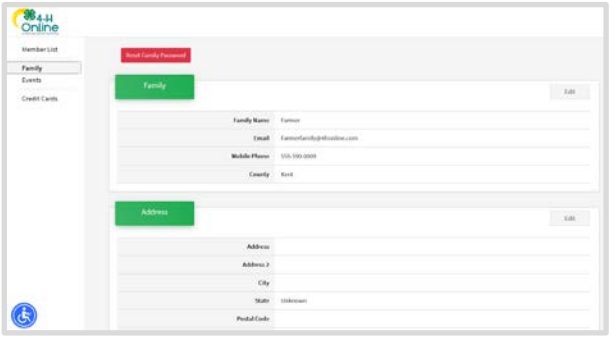
1. Member Flags can be removed from records on the Member Search screen 2. You can remove flags one member at a time by clicking the Flag icon in line with the member record. 3. Click the Flag Options button and select Clear All Flagged Results to remove the flags from records in bulk.	

Creating Family Profiles (if a County Manager is assisting the family)

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 required.*	

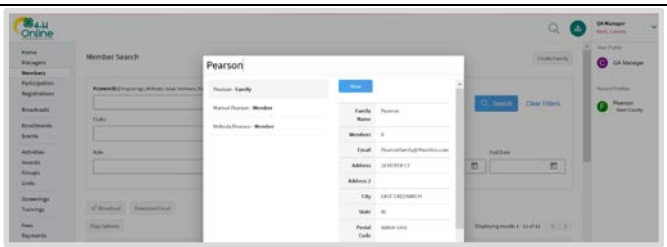
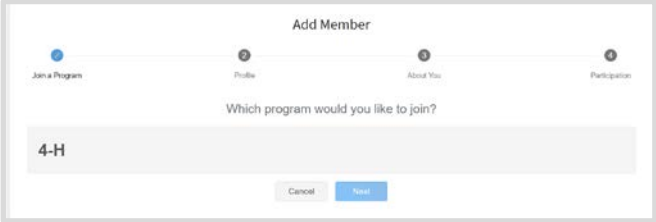
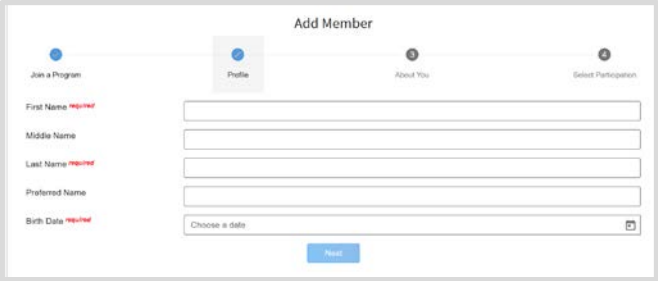
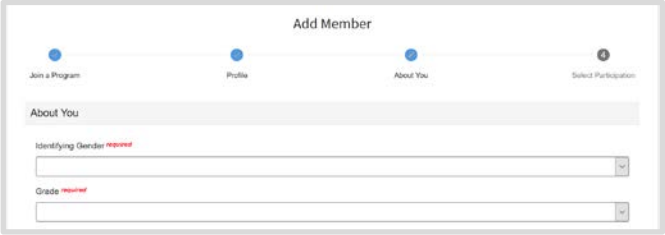
Editing Family Information & Resetting Family Password

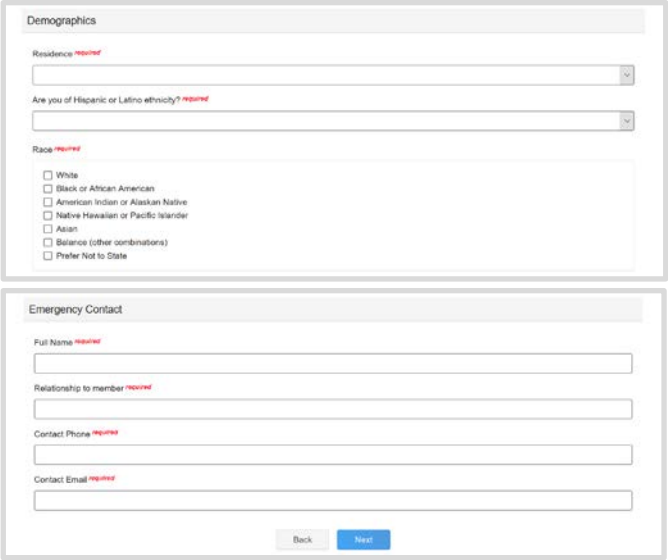
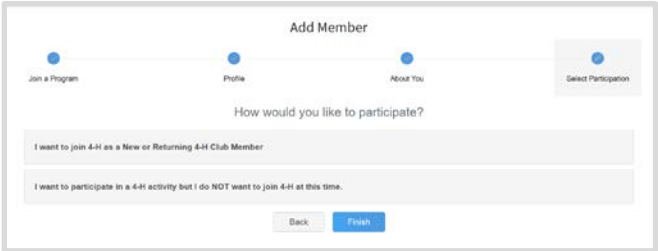
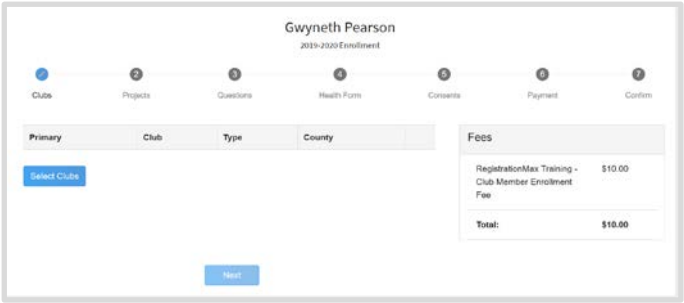
1. Click on the Magnifying Glass from any screen. 2. Enter in the Family last name in the Global Search.	

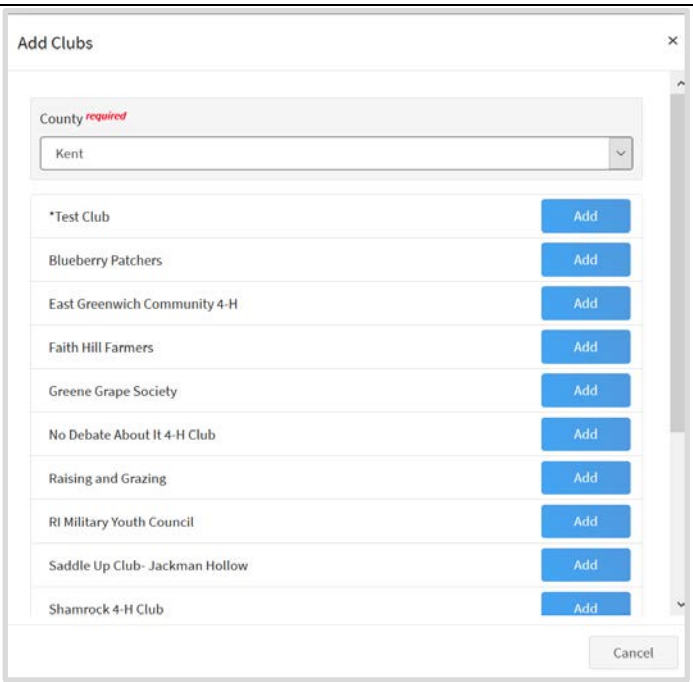
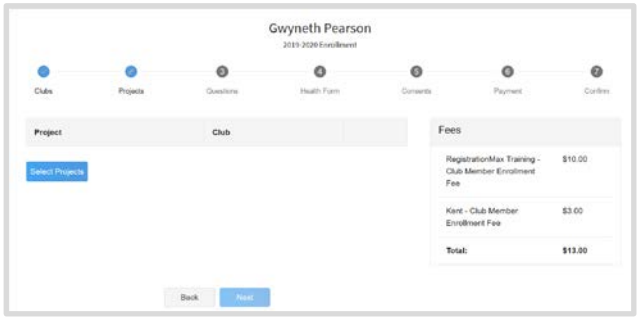
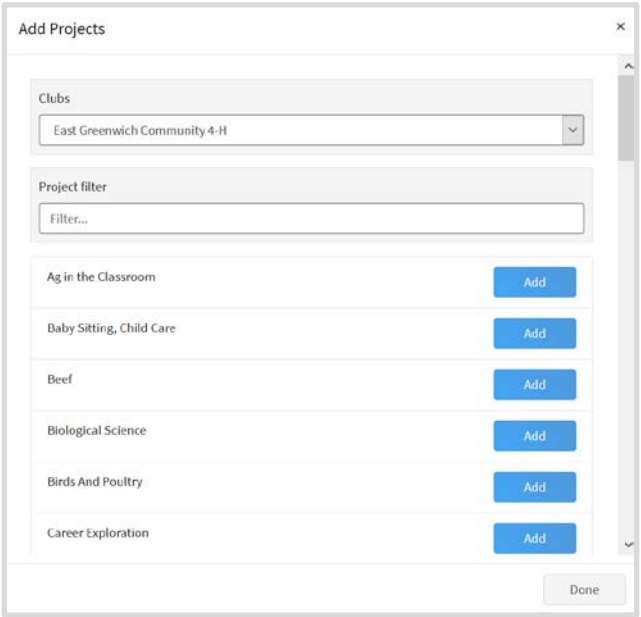
3. Review the records that are returned. 4. Click View next to the record you need to modify.	
5. Click Family in the navigation pane. 6. Click Edit next to the area you need to modify. 7. Edit the family information and click Save. 8. If you need to reset the Family Password, click the red Reset Family 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 (if the County Manager is assisting the 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 Units 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.	

	
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.	 

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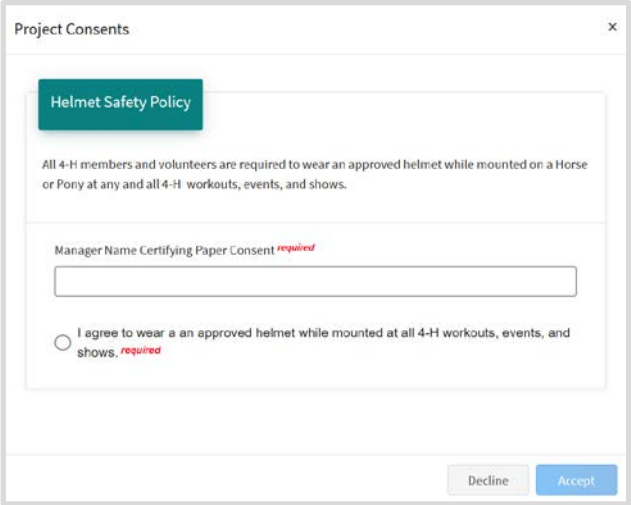
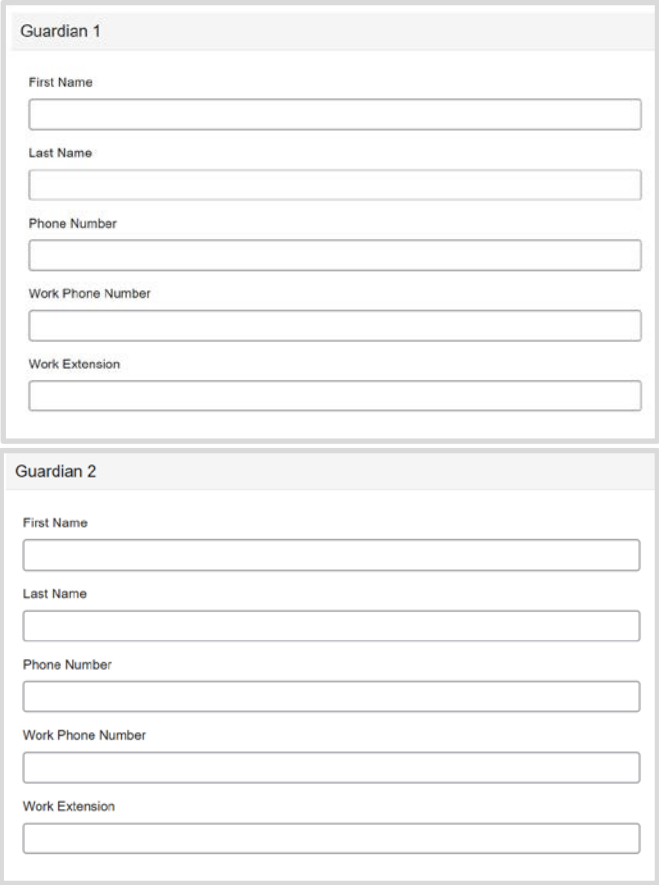
<td> 
</td>
</tr>
<tr>
<td>29. Review the About You, Demographics, and Emergency Contact information that was entered when the profile was created. Make corrections as needed.
30. Complete the Guardian, School, and Military information.
NOTE: Guardian 1 information will become required for all Cloverbud and Youth aged members)
31. Complete the Other Questions and upload Files sections if applicable to your county.
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.</td>
<td> 
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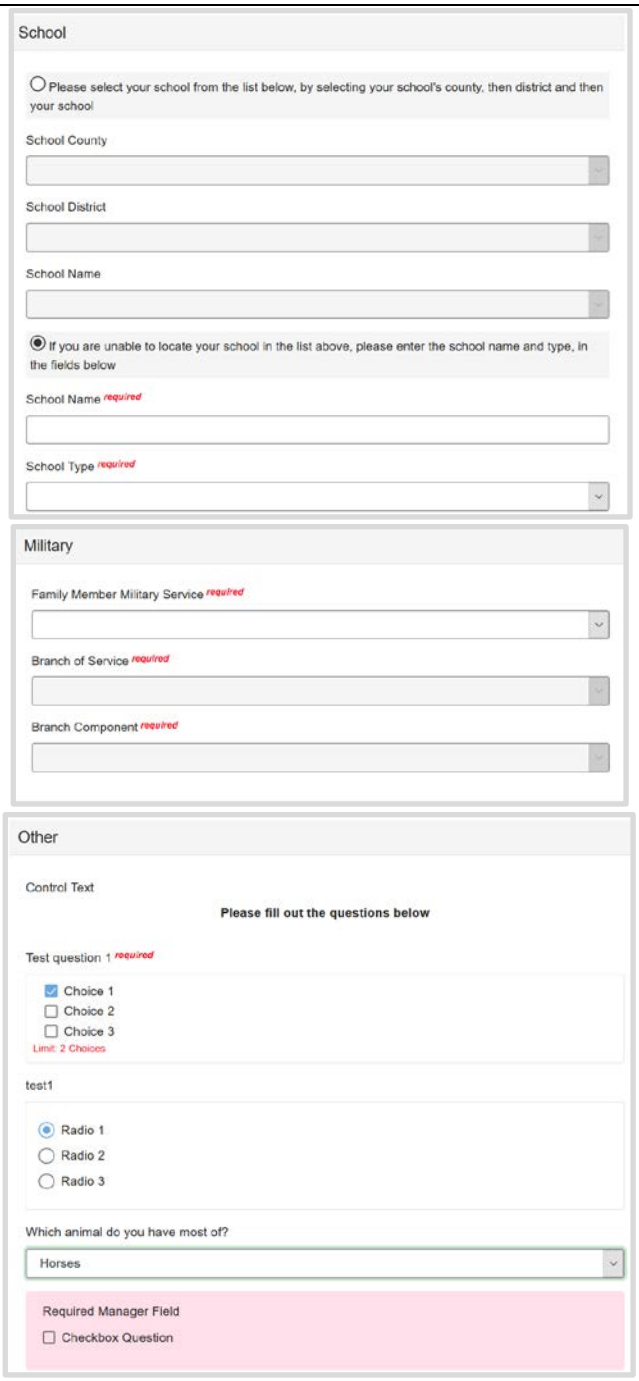
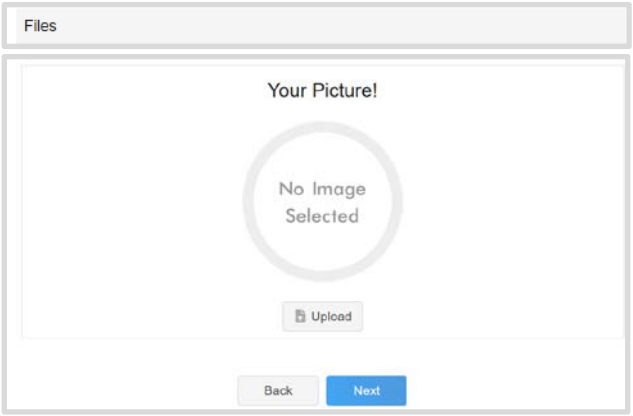
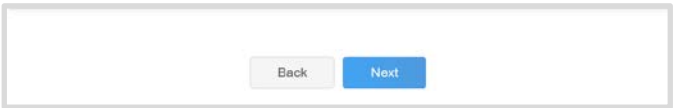
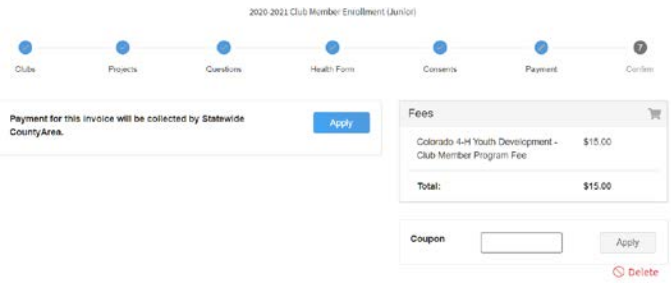
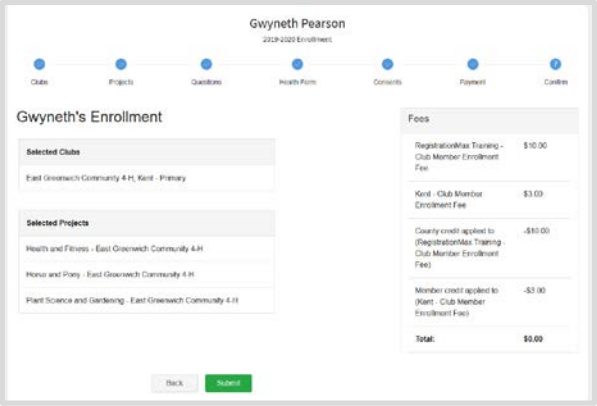

School
Please select your school from the list below, by selecting your school's county, then district and then your school
School County
School District
School Name
If you are unable to locate your school in the list above, please enter the school name and type, in the fields below
School Name required
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

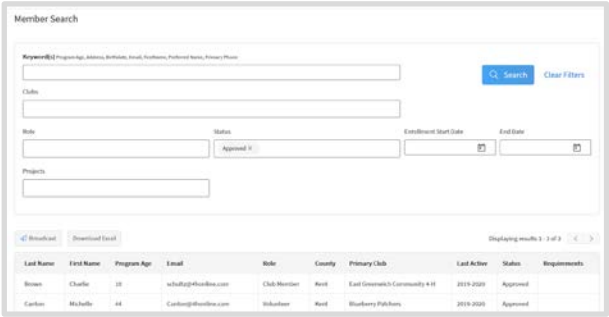
	
33. Completing the health form is optional in Colorado. Some fields are dependent, meaning if the response is yes, there may be a text field that requires an explanation or additional text information. 34. The manager will enter their own name in the signature field for the Medical Release. The manager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

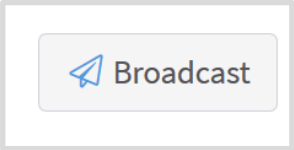
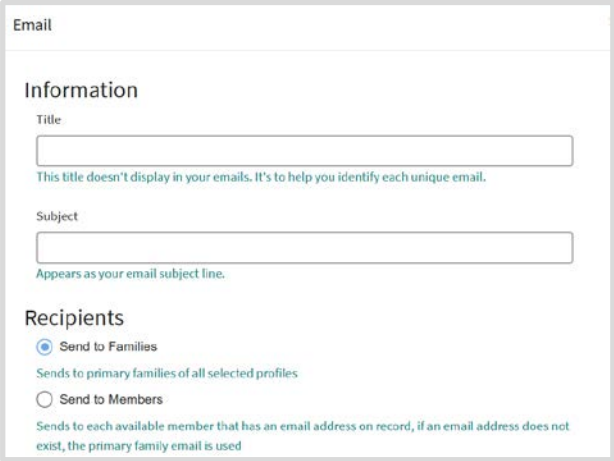
1. Managers may search for members based on keywords, club participation, Role, Status, enrollment dates and/or projects. 2. The menus are multiple select menus, meaning you can choose more than one club, role, status and project in a single search request. Click in the field for the drop-down menu to 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.	

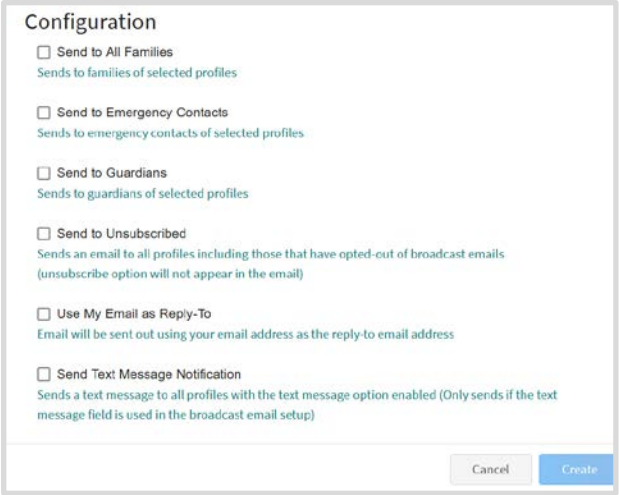
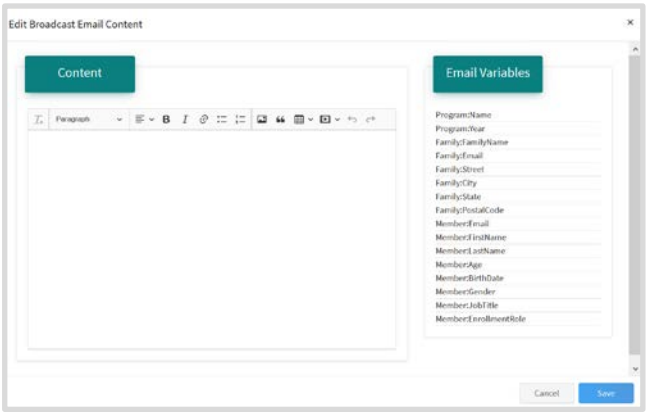
Registrations *(coming soon)*

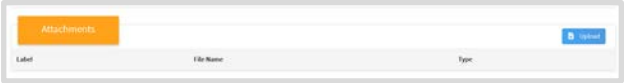
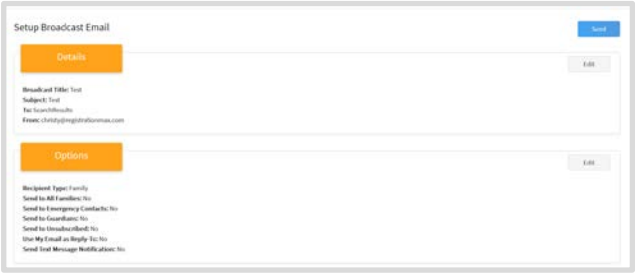
Broadcast

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	

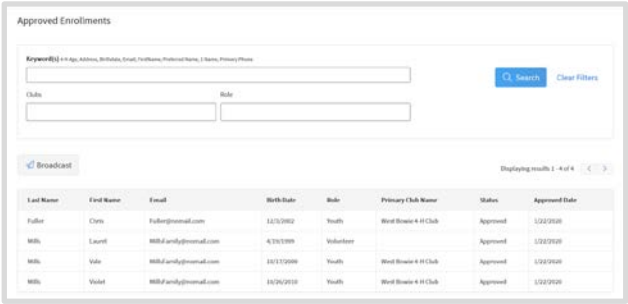
	
7. The Recipient and Sender information will automatically fill into the To and From Fields. 8. Click Edit next to Details to make corrections to the Title or Subject of the message. 9. Click Edit next to Options to make changes to the configuration options selected.	
10. Click Edit next to Content to 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

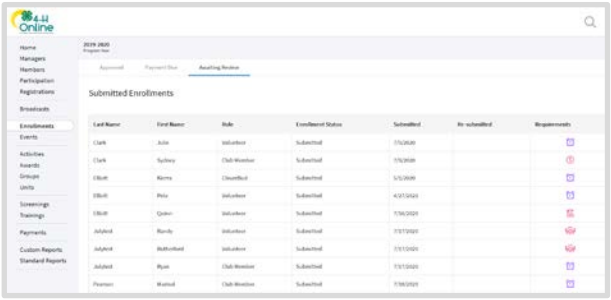
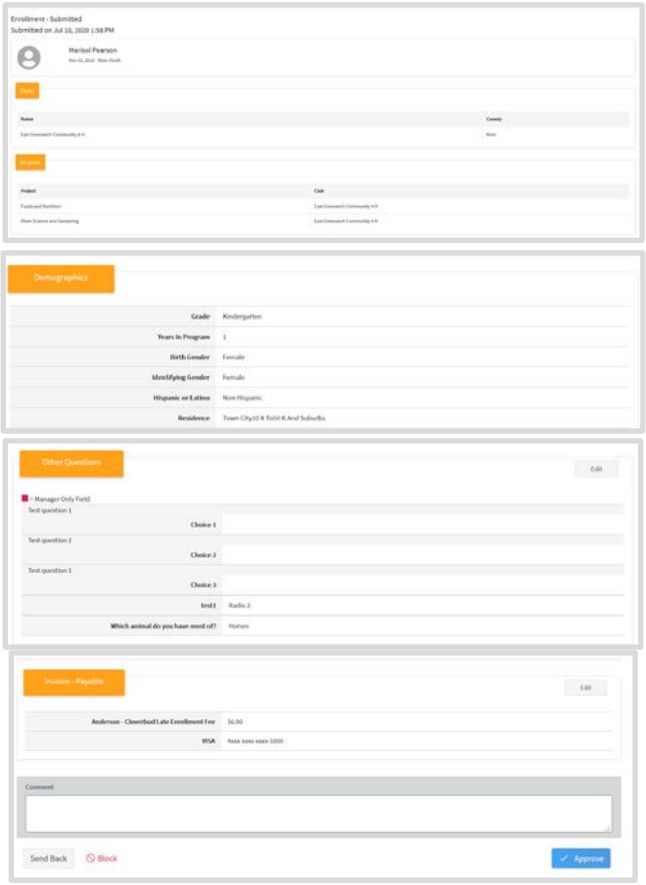
The Enrollment tab contains sub-tabs for viewing Approved and Submitted enrollments. The member records listed in this area pertain to the current program year.

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.	

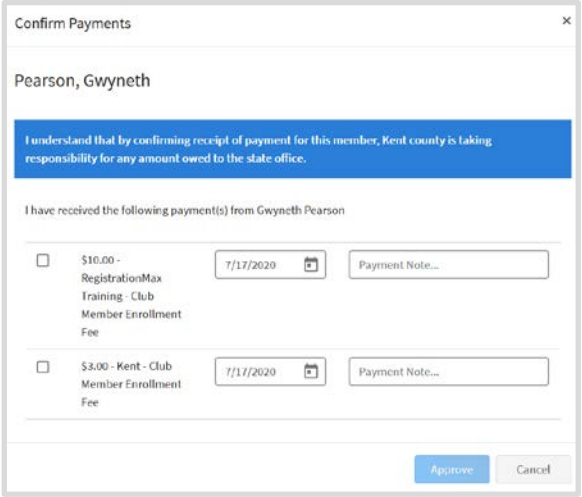
Reviewing Enrollments

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

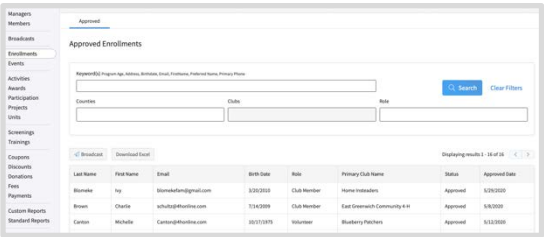
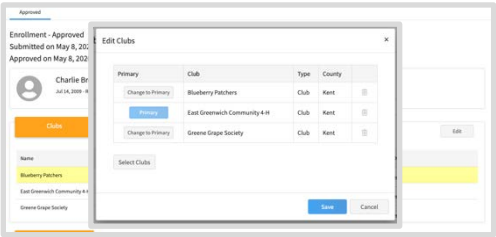
2. Click on the Awaiting Review sub-tab. 3. The screen will list all enrollments that have been submitted. 4. Hover over the symbol in the requirements column to see what is needed for the enrollment to become Active. Records that have an alarm clock symbol are ready to be reviewed.	
5. Click on the member's name to review their enrollment information **THOROUGHLY** as members/volunteers are unable to edit the club/project information **after APPROVED**. 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, click the Approve button.	

Recording Enrollment Payments Received in the County Office

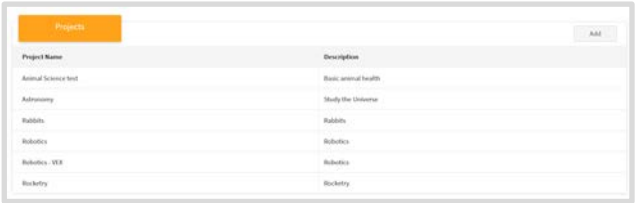
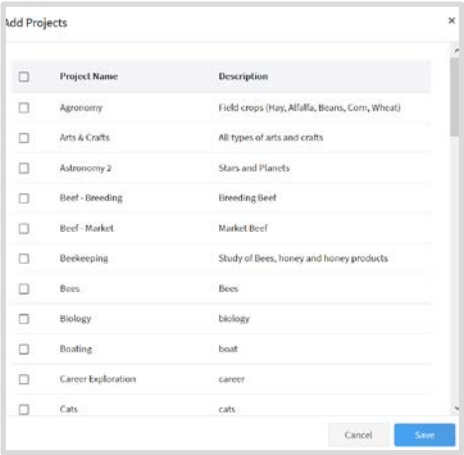
1. Click on Enrollments in the navigation pane. 2. Click on the Payment Due subtab.	

	
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.	

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.	

Payments

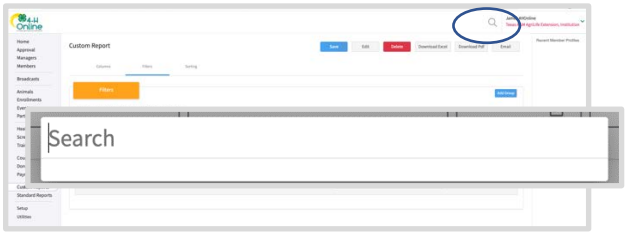
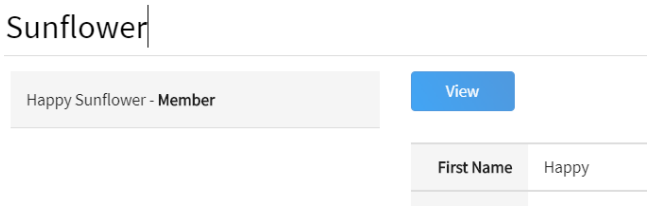
The Payments section allows a County Manager to search for payments by keyword, club, Start and End date, invoice number, payment number and/or payment status.

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.	

Appendix A – Basic Navigation Tips

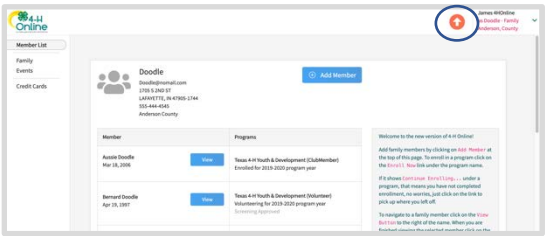
Global Search

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

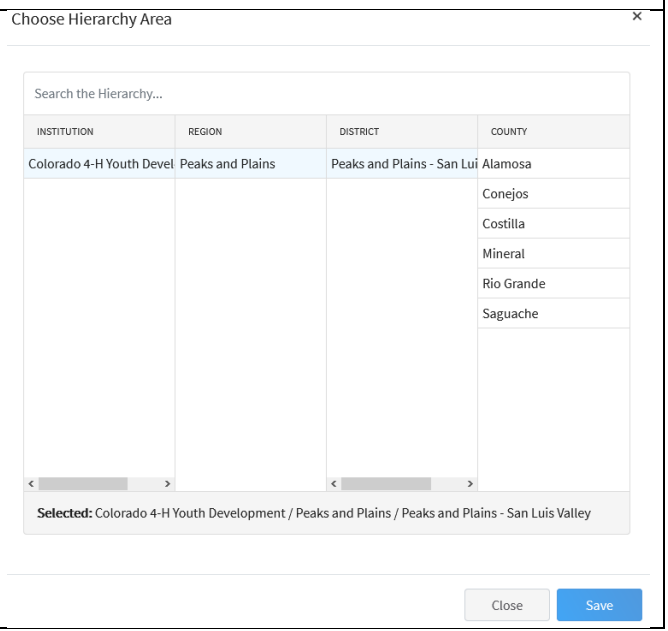
To return to a member's profile that you have recently viewed, click on the member's name in the right-hand pane titled Recent Member Profiles. If you do not see this pane, try to zoom out in your browser (ctrl + -). ***NOTE:*** *You will not see this pane while you are logged in to a member or family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

Managers

Manager account

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 (if applicable)

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.

Enrollment

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

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

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.

Role
Adult, Youth or Cloverbud

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)

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).