4HOnline – Getting Started

To Start: go to me.4online.com (not case sensitive). It is best not to use Explorer when working in 4HOnline. Firefox and Google Chrome work well.

Logging In: you should have received an email from 4HOnline with a temporary password. If not, stop here and contact Jessy Brainerd, our system administrator. When you are ready to proceed, the URL above should bring you to the login page for Maine 4HOnline.

First, select “I have a profile,” then enter your email address and temporary password (you can reset this once you have access). Finally, select “County” as your role and select your county or district, then click “Log In”.

If you forget your password or need other assistance with the 4HOnline enrollment system, Jessy as our system administrator is your primary contact. Please send all requests for assistance with the 4HOnline database to her.

Working within the 4HOnline System

4H Online Structure: The system is built on a hierarchical structure so that each level has access to the information in the levels below it. The structure is:

• State Administrator (Jessy Brainerd)
• State Account – staff with statewide responsibilities
• Region Account – not determined
• County and District Accounts (educators and administrative specialists) – districts are counties grouped together within one office – i.e., Androscoggin-Sagadahoc, Knox-Lincoln.

Since we are not allowing families to enter their own information yet, we are not using the club, family or member levels right now.

Getting Started:

All Maine 4-H projects and clubs have been entered into the database. The member/family/volunteer information wasn’t able to be imported into 4HOnline from Access, so will be entered directly at the county level. New clubs can be added by clicking on the club tab at the top of the homepage. The list of statewide projects can’t be changed at the county level, so contact our state administrator (Jessy) if revisions are needed for any reason.

At first you will be assigned to the Training County. This account is where you can explore, practice entering information and running reports without affecting any real data. All staff have access to this practice database, so you will be seeing data that others have entered, and can learn along with everyone else. None of the data entered here has any impact other than being used as a learning tool. This will also be the data/county that 4HOnline staff may review if we report any problems or issues using the system. That way what they do to test our system won’t impact our real data. Once you feel confident entering data and generating some reports in the Training County, please send an email to Jessy (jessica.brainerd@maine.edu) asking to be assigned to your actual county/district account.
Entering Data:
All data is entered by first creating the family account. For instance, you would create the “Smith family” account, and then add youth members and adult volunteers in the Smith family. Please note that both youth and adults are referred to as members.

- Click the enrollment tab and then click “add family”.
- Enter the name, parent/guardian email and phone and then click “add family”. For the correspondence preference setting, select ‘email’ unless the family has no email address and/or has requested USPS mail only.
- Enter information in all the required fields (indicated by the red asterisk *).
- Select “update member records with the same address” (this will automatically enter address for all family members).
- We are using the address verification option – the system will notify you if the address does not match USPS records. The family’s account will remain incomplete until the address is verified.
- Click ‘continue’, which will save your work before going to the next screen.
- Now you can add individual family members, both youth and adult (note both are called members). Select youth, or adult to add a volunteer.
- Any adult you are entering that is not a volunteer should be entered as a contact (not as an adult member).

For adult members:
- Click ‘add new member’.
- Fill in required fields and other fields as needed.
- There are options for parent 1 and 2; for use with youth members when parents have different addresses.
- We are not uploading documents as of now. We are not using activities.
- Select ‘yes’ when asked if the adult is a volunteer. If the adult is not a volunteer, add as a contact only.

When you check the volunteer option for this adult you will see another screen where volunteer screening is tracked. Check off the forms that have been received. Enter the date the background clearance paperwork was sent to Orono and enter the same date under approval (it has not been approved yet but the system won’t let you advance until this field is filled in). Once clearance is received you will need to go back to this screen and change the approval date. You must check that the 3 references have been approved to advance to the next screen.
  - IMPORTANT: The volunteer is marked as pending in the system until you accept the volunteer – you don’t accept the volunteer until the background check clearance is received. Once all volunteer screening is complete click “accept member”.
  - You can now link the volunteer to a club, if appropriate.
  - Select the volunteer type (Main Leader, Assistant Leader, etc.)
  - Click ‘continue’
  - You can link the volunteer to a project, if appropriate
  - You can link the volunteer to a group enrollment, it appropriate (this would be for short term special interest groups if you are entering the volunteer)
  - Click ‘submit enrollment’
  - This will take you back to the family screen, where you may now add another family member, either youth or adult.
  - If you see the screening payment field for volunteers you can ignore that screen – we do not charge volunteers for screening as some other states do.
For youth members:
- This program will automatically add the school (based on address) for youth and you may edit the information.
- You must indicate military status for every youth.
- You can select a club from the drop down menu. If the club does not appear in the menu, it can be added before completing the enrollment (go back to the enrollment screen and click on club tab at top of page to do this).
- All members must be associated with a club and project.
- If you have independent members, create a club – “Penobscot Independent Members” and associate this with the independent project option.
- **Once you have verified the data you entered** you will need to click “accept member” for youth, as you did for adult members.
- If multiple staff are entering data for your county, please do a search of the last name before entering a family to make certain you are not creating a duplicate record.

Entering Leaders Associations and other ongoing advisory groups: enter them as groups. Do not create a group enrollment form and their numbers won’t count in the ES237.

**Important**: 4HOnline allows you to work in only one 4-H year at a time. When the system rolls over to a new 4-H year each Oct. 1, the past year’s data cannot be altered. You will still be able to access it (for verification, sending emails, creating reports, etc.) but you will not be able to make any changes. The rollover will advance each member’s age, school grade, etc. All enrollments must be entered by Sept. 30 for any current year in order to count on the ES237. Once the system rolls over, all members and volunteers become inactive.

**Running reports:**
There are many standard reports in 4HOnline, so you won’t need to create a new report each time as you had to do in Access, and you can create custom reports if you need to. For instance, you will need to create (or save) custom reports in order to send broadcast emails. The instructions on how to do this are in the “Broadcast Email” help sheet. Once in your custom reports they automatically update as you add enrollment. You never have to edit this report.

**4HOnline Vocabulary:**
- Both adult volunteers and youth members are referred to as “Members”
- For volunteer types, we are using two categories, Main Leader and Other (other club leaders, committee members, etc.).
- Each club can have only one Main Leader (and must have one Main Leader)
- “Contact” is used for an adult that is not a volunteer and will not count on ES237. This could be an adult that requested to be on the mailing list, etc.
- For full list of 4HOnline terms, see the vocabulary guide

Don’t forget to use the 4HOnline Guides:
- How to Add a New Family and Adult Member-County
- How to add a New Family and Youth-County
- 4HOnline Glossary