



4HOnline Tip Sheet:

Entering a Family Profile at the Unit Level on behalf of Family

Tonya T. Price, Assistant Professor and Extension Specialist, 4-H Youth Development, Virginia Tech
Katie Lafon, State Events Coordinator, 4-H Youth Development, Virginia Tech

- A family profile must be entered before you can enroll any youth or volunteers. Before you begin entering data, you will want to have enrollment form and health forms in front of you.
 - Click on “Search” icon (magnifying glass) under enrollment tab
 - Click on Families tab under enrollment tab
 - Click on “Add Family” in the middle of the page
 - Enter Family Name (Last name of family)
 - Enter Email Address – If family has no email address you can leave this section blank.
 - Enter Phone Number
 - Click confirm “Add New Family” (check box)
 - Click “Add Family” – may need to click this twice
- At Family Information Screen
 - Enter mailing address, city, zip and choose correspondence preference
 - Click update member records with the same address. Clicking this will update the records of all family members if the family profile is edited.
 - Click continue
- At Member List Screen
 - Start adding family members (youth or adults)
 - Under “Add a New Family Member” select Adult, Contact or Youth
 - A contact is a non 4-H member associated with 4-H in some way. Contacts can include board members, committee members, donors, etc. Contacts do not count on your ES237.
 - Click “Add Member” for all members with the exception of group members. You will click “Add Short Term Member” for group members. Examples of groups include youth only participating in 4-H through Jr. Camp, Congress, FNP, EFNEP, etc.
 - If a member has previously been added to a family, you can copy parent information by selecting sibling in the pull down menu.

- Complete Enrollment Fields. Red asterisks = required fields.
- Second household is for divorced families or similar situations
- At Additional Information Screen
 - Units can't see this information when entering data on family's behalf because unit can't provide consent for family. Only the family member can provide consent and signatures. If unit is entering data on family's behalf, paper copies of authorization forms will need to be collected (Code of Conduct, Equine Waiver, Standards of Behavior)
- At Health Form Screen
 - Enter all health information
- Participation Screen
 - Click on the triangle pull down beside "Select a Club". You should see a list of all of your active clubs (either imported into the system or manually entered). Select the club you want and then click "Add Club". If the member is in multiple clubs, you select another club and then click "Add Club". Under the club list you can select which club is their primary club.
 - Click continue to add member to projects.
- Project Screen
 - Under add a project, select a club, project and years in project.
 - Select project materials is turned off because members are expected to provide their own supplies.
 - Follow the same steps to add multiple projects.
 - Click continue to add activities
- Activities Screen
 - Select 4-H year
 - Click project related to see project related activities or leave black to see non-project related activities.
 - Click "Add Activity"
 - Follow same steps to add additional activities
 - Click continue
 - Please note that families cannot enter their own activities. These will need to be entered on the unit level.
- Awards Screen
 - Select 4-H year
 - Select an award
 - Click "Add Award"
 - Follow same steps to add additional activities
 - Click continue

- Please note that families cannot enter their own awards. These will need to be entered on the unit level.
- Groups Screen
 - Select a group from pull down menu
 - Click “Add Group”
 - Repeat to add member to additional groups.
- Submitting Enrollment
 - Submit enrollment when member’s record is complete. You will then see the member’s profile information. Scroll all the way to the bottom of the screen and click “Accept Member”. Accepting member changes their account from pending to active.