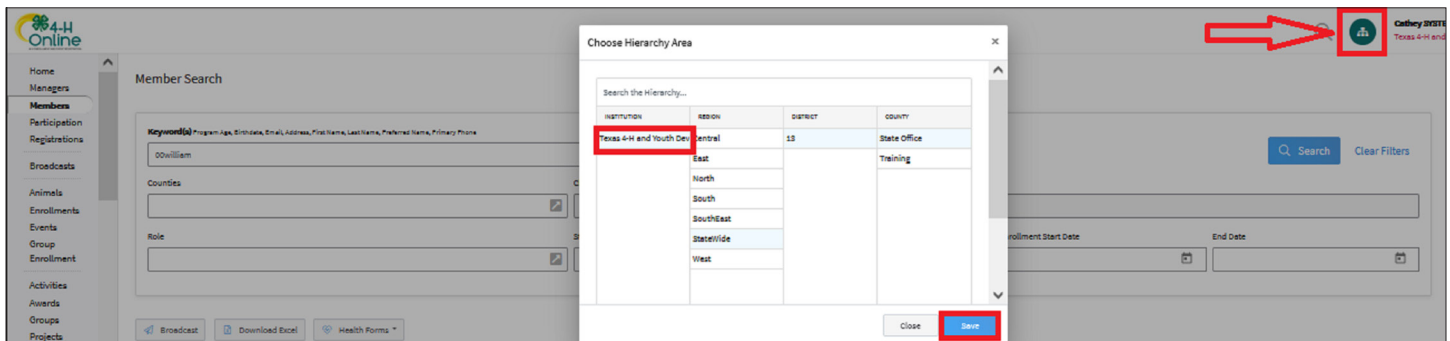


Before you get started! The best enrollment status will say have the words Enroll Now beside ALL member names in a family. Delete enrollment when possible so it can be restarted in the new county. If a family is moved while members are in any pending, screening or in a training process there may be issues with events and enrollment details.

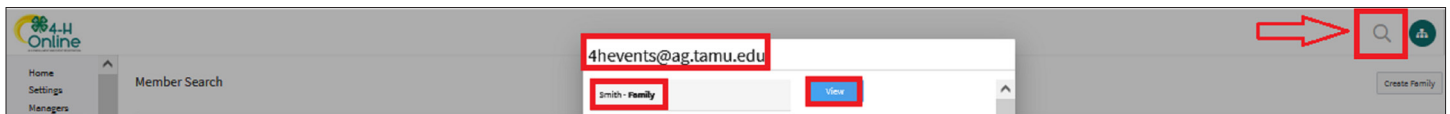
IF AN ENROLLMENT HAS BEEN STARTED THE DISTRICT NEEDS TO ENTER THE MEMBER CLUBS AND PROJECTS. IF NOT THE MEMBER WILL SHOW UP IN THE WRONG COUNTY STILL. THE COUNTY MIGHT NOT BE ABLE TO DO IT.

COUNTY MANAGERS DO NOT HAVE PERMISSIONS FOR THESE INSTRUCTIONS

- Click the green hierarchy icon at the top of any manager screen.
- Select the Texas 4-H and Youth Development hierarchy selection under the Institution level.
- Click the blue Save button.



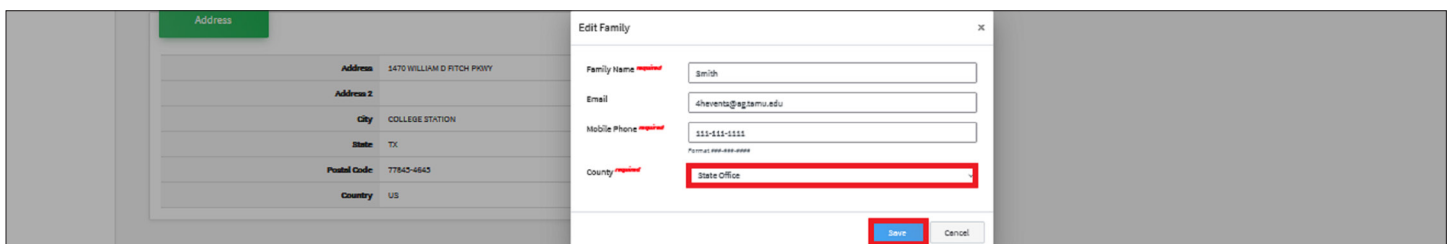
- Click the Magnifying glass at the top of the screen.
- Type in the family's email address on the screen that pops up. Allow time for the system to search across the state.
- Click the family's name from the list on the left side.
- Click the blue View button.



- Click the Family link on the left side on the navigation pane.
- Click the Edit button in the Family section.



- Select the new county from the drop-down menu. If unable to then you are not in the right hierarchy or not a state/district office.
- Click the blue Save button.



CONTINUE TO NEXT PAGE FOR STEPS TO ENSURE THE COUNTY CHANGED IN ALL THE MEMBER PROFILES

DISTRICT STEPS SUGGESTED AFTER A FAMILY IS TRANSFERRED

1

FAMILY ACCOUNT REFRESH

- Click the magnifying glass at the top of the manager screen
- Type in the family's email address
- Click the family's name from the list on the left side
- Click the blue View button
- Click the Family link in the navigation pane on the left side of the screen
- Click the Edit button in the family information section
- Click the blue Save button
- Click refresh or reload in the browser

2

CLUB REFRESH

APPROVED

- Click the Enrollment link
- Click the Approved sub-tab
- Click the Clear Filters link
- Type in the family email address
- Click the blue search button
- Click the member's name in the list
- Click the Edit button in the clubs area
- Take note and remove all clubs
- Add each club
- Click the Blue Save button
- Click refresh or reload in the browser
- Repeat for next family member

INCOMPLETE OR AWAITING REVIEW(send back)

- Click the magnifying glass on manager screen
- Type in the family's email address
- Click the family's name from the list on the left side
- Click the blue View button
- Click the blue View button beside the member's name
- Click the Clubs link
- Click the Edit button
- Take note and remove all clubs
- Add each club
- Click the Blue Save button
- Click refresh or reload in the browser
- Repeat for next family member

3

PROJECT REFRESH

APPROVED

- Click the Enrollment link
- Click the Approved sub-tab
- Click the Clear Filters link
- Type in the family email address
- Click the blue search button
- Click the member's name in the list
- Click the Edit button in the project area
- Take note and remove all projects
- Add each project
- Click the Blue Save button
- Click refresh or reload in the browser
- Repeat for next family member

INCOMPLETE OR AWAITING REVIEW(send back)

- Click the magnifying glass on manager screen
- Type in the family's email address
- Click the family's name from the list on the left side
- Click the blue View button
- Click the blue View button beside the member's name
- Click the Projects link
- Click the Edit button
- Take note and remove all Projects
- Add each Project
- Click the Blue Save button
- Click refresh or reload in the browser
- Repeat for next family member

IMPORTANT

- ADULT PROFILES - YOU MAY NEED TO DELETE THE VOLUNTEER TYPE AND ADD IT BACK BEFORE THESE TIPS WILL WORK
- STARTED/DELETED PROFILES - YOU MAY NEED TO START/RESTART THE ENROLLMENT AGAIN TO DO THESE TIPS
- AWAITING PAYMENT PROFILES - YOU CANNOT DO ANYTHING YET - PAYMENT MUST BE RECEIVED FIRST