

REVIEW THESE TIPS BEFORE CONTINUING TO NEXT PAGE

**APPROVAL
LEVEL**

Animals are only approved at the final level by the county office.

After approval the family should NOT make changes to that animal profile. The state will do a review on the backside to communicate any issues with the record.

The state office cannot reverse approve or block statuses.

EDITS

Changes can be made by clicking the Edit button in the details sections. Photos and paperwork can be updated in the Files section.

**PAYMENT
TYPE**

Review the invoice at the bottom of the screen carefully.

Horse - The only payment type available is the credit card payment method. The family must be logged in with their email and their password. Fees should be totaled and checked against the invoice total at the bottom. County checks are not accepted for animal payments so do not send the animal back for that reason.

Dog - There is not a payment due for the Dog animal type.

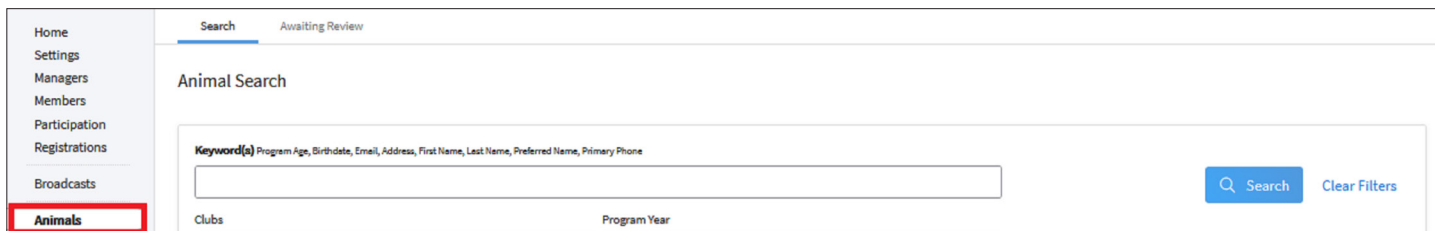
**REVIEW
WAIT TIME**

Wait 5 minutes in between clicking the approve button from member to member. The longer the wait time in between the better. There is not an undo button after the error pops up on the screen. This wait time becomes important when approvals are done with members of the same family. Most credit card banks have a fraud filter in place so the credit card processor will reject and cancel out the transaction. This will require the family to return to the system to submit their payment again.

CONTINUE TO NEXT PAGE FOR INSTRUCTIONS

REVIEWS DONE ON THE AWAITING REVIEW SCREEN

- Click the Animals link in the navigation menu on the left side of the screen.



Home
 Settings
 Managers
 Members
 Participation
 Registrations
 Broadcasts
Animals

Search Awaiting Review

Animal Search

Keyword(s) Program Age, Birthdate, Email, Address, First Name, Last Name, Preferred Name, Primary Phone

Search Clear Filters

Clubs Program Year

- Click the Awaiting Review sub-tab along the top of the screen. The screen will list all animals that have been submitted.
- Click on the member's name to review their animal information.



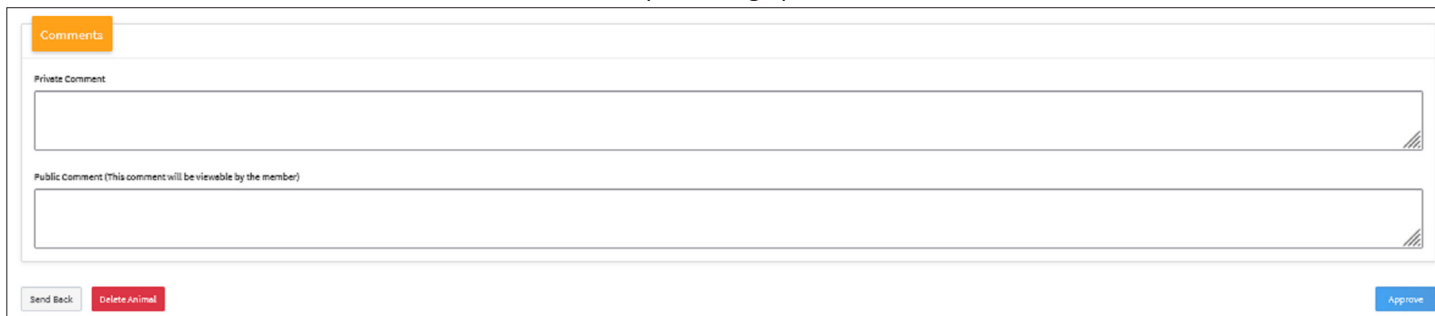
Home
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Animals

Search **Awaiting Review**

Submitted Enrollments

Last Name	First Name	Type	Identifier
Smith	Johnny0	Dogs	Sally SUE

- Scroll down to view the information on the screen and click to make limited edits if needed.
- Scroll to the bottom and make a selection from the three processing options.



Comments

Private Comment

Public Comment (This comment will be viewable by the member)

Send Back Delete Animal Approve

SEND BACK	DELETE ANIMAL	APPROVE
Public Comment Required	Public Comment Required	No Comment Required
Removes the awaiting review status and opens the animal back up for family edits. The required public comment will be emailed to the family email address and the record will disappear from the review screen.	Change the Animal Identifier to "DELETED" before clicking the red Delete Animal button. Deleting the animal will make the record disappear from the screen but it will still show up on reports still. This animal will show up on all reports so it is recommended not to Delete.	Locks the animal record and changes to that record after that are NOT allowed. The horse animal type is the only one with a payment. The payment will be processed as soon as the Approve button is clicked.

Private Comments	Public Comments
Only the manager sees the private comments and those are not emailed to the family email address.	Upon approval or rejection this comment will be emailed to the family email address. This will also can be viewed by anybody on the animal screens.

EDITS

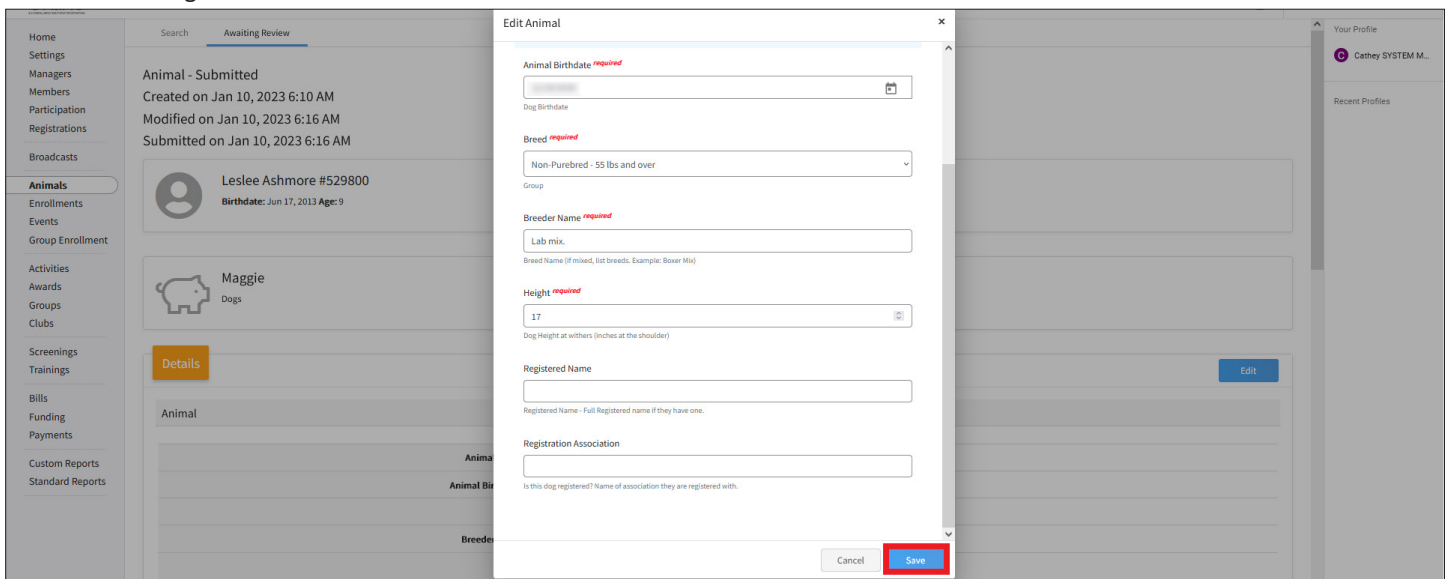
- Click the Animals link in the navigation menu on the left side of the screen.
- Click the Awaiting Review sub-tab along the top of the screen. The screen will list all animals that have been submitted.
- Click on the member's name to review and edit.



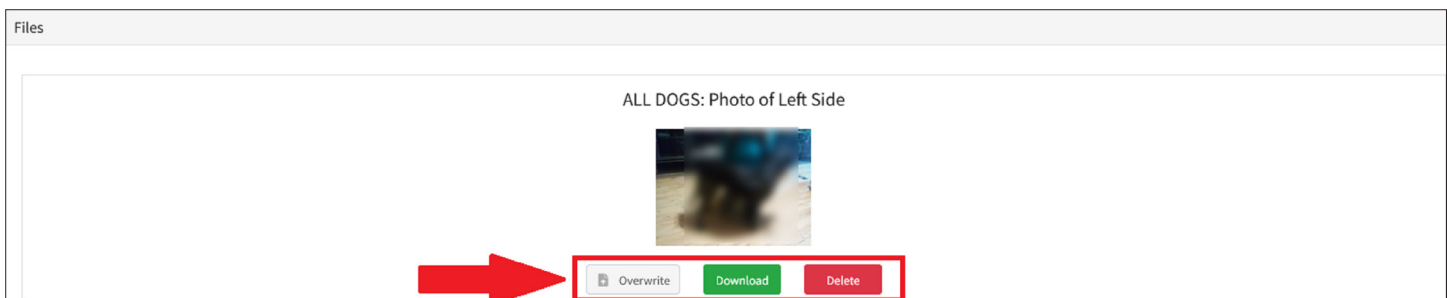
- Scroll down to view the Details section and click the blue Edit button to make changes.



- Make the changes and click the blue Save button.



- Scroll down the screen to the File section to download or overwrite a file.

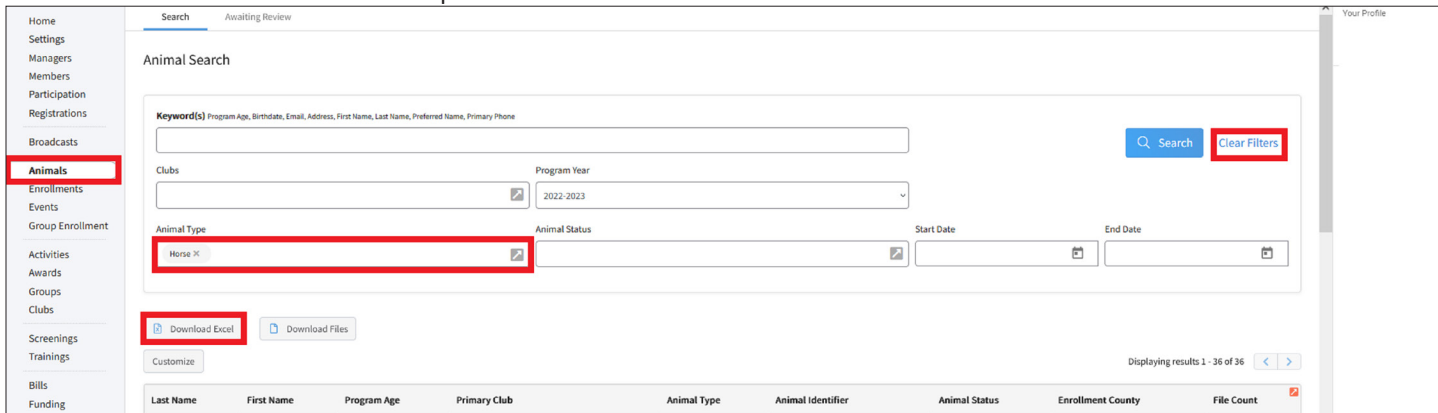


ANIMALS(HORSE) CAN ONLY BE PAID FOR WITH A FAMILY CREDIT CARD - NO CHANGES ALLOWED

The members of Texas A&M AgriLife will provide equal opportunities in programs and activities, education, and employment to all persons regardless of race, color, sex, religion, national origin, age, disability, genetic information, veteran status, sexual orientation or gender identity and will strive to achieve full and equal employment opportunity throughout Texas A&M AgriLife.

ANIMALS LINKS SCREEN

- Click the Animals link in the navigation menu on the left side of the screen.
- Click the Clear Filter link in the search area of the screen.
- Select the Animal in the Animal Type box.
- Click the blue Search button in the search area of the screen.
- Click the Download Excel button and open the file.



- Open the downloaded file in Excel to sort as needed.

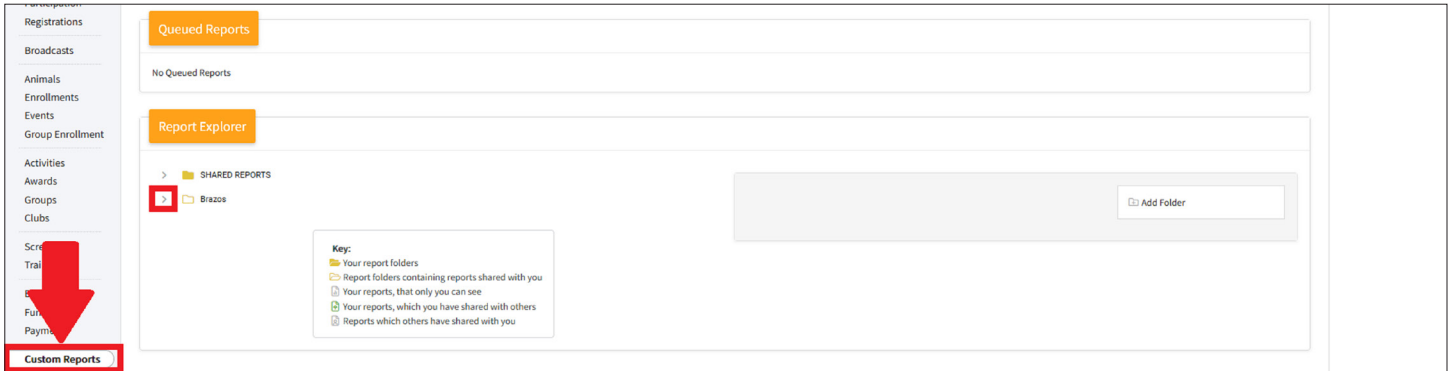
MemberID	LastName	FirstName	ProgramAge	Email	EnrollmentTitle	EnrollmentCounty	PrimaryClubName	LastActiveEnrollmentYear	DesiredStatus	AnimalType	AnimalStatus	AnimalIdentifier	FileCount
1			12		ClubMember	Johnson		2022-2023	Approved	Dogs	Incomplete		0
2			15		ClubMember	Tarrant		2022-2023	Approved	Dogs	Active		2
3			8		ClubMember	Milam		2022-2023	Approved	Dogs	Active		2
4			11		ClubMember	Tarrant		2022-2023	Approved	Dogs	Active		2
5			17		ClubMember	Angelina		2022-2023	Approved	Dogs	Active		2
6			15		ClubMember	Gillespie		2022-2023	Approved	Dogs	Active		2
7			9		ClubMember	Hood		2022-2023	Approved	Dogs	Submitted		2
8			10		ClubMember	Guadalupe		2022-2023	Approved	Dogs	Active		2
9			10		ClubMember	Guadalupe		2022-2023	Approved	Dogs	Active		2
10			9		ClubMember	Gray		2022-2023	Approved	Dogs	Active		2
11			9		ClubMember	Fayette		2022-2023	Approved	Dogs	Submitted		0
12			11		ClubMember	Fayette		2022-2023	Approved	Dogs	Submitted		0
13			8		ClubMember	Harris		2022-2023	Approved	Dogs	Active		2
14			17		ClubMember	Walker		2022-2023	Approved	Dogs	Submitted		2
15			12		ClubMember	Bexar		2022-2023	Approved	Dogs	Active		2
16			9		ClubMember	Bexar		2022-2023	Approved	Dogs	Active		2
17			16		ClubMember	Bexar		2022-2023	Approved	Dogs	Active		2
18			14		ClubMember	Bexar		2022-2023	Approved	Dogs	Active		2
19			13		ClubMember	Wise		2022-2023	Approved	Dogs	Submitted		2
20			13		ClubMember	Wise		2022-2023	Approved	Dogs	Submitted		2
21			13		ClubMember	Wise		2022-2023	Approved	Dogs	Submitted		2
22			13		ClubMember	Wise		2022-2023	Approved	Dogs	Submitted		5

- Find the status column and follow up as needed depending on what is listed for the member's animal.

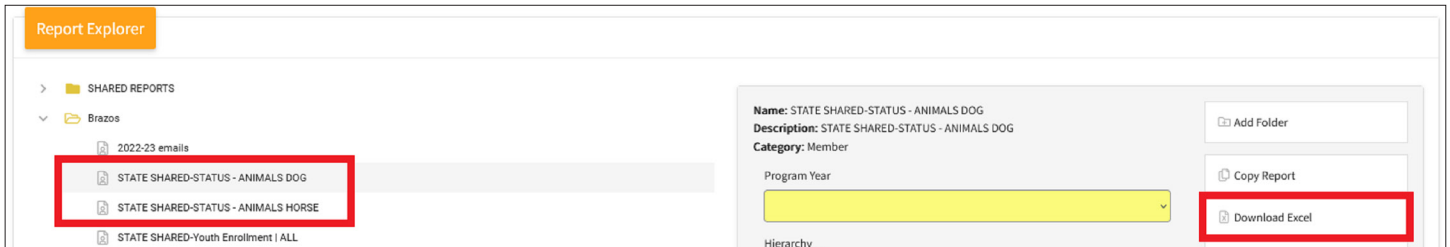
STATUS	DESCRIPTION	Action Needed
Active	The animal has been approved by the county. (and paid if applicable)	NONE
Incomplete	The animal was created by the family under a member profile but not submitted for approval.	Family needs to submit the animal through to the last screen.
Payment Due (Horse Only)	The animal was approved but there is a fee has not been paid with a credit card.	Family needs to resubmit a credit card payment.
Send Back	The county has returned the animal record back to the family.	Family needs to make corrections and resubmit through to the last screen.
Submitted	The family submitted the animal record but the county has not approved it yet.	County office needs to review the animal record.

CUSTOM REPORTS

- Click the Custom Reports link in the navigation menu on the left side of the screen.



- Click the right-arrow icon beside the county folder name to open the folder. This is normally the last folder in the list.
- Click the Custom Report called **STATE SHARED-STATUS - ANIMALS DOG OR STATE SHARED-STATUS - ANIMALS HORSE**
- Click the Download Excel option on the right side of the screen.

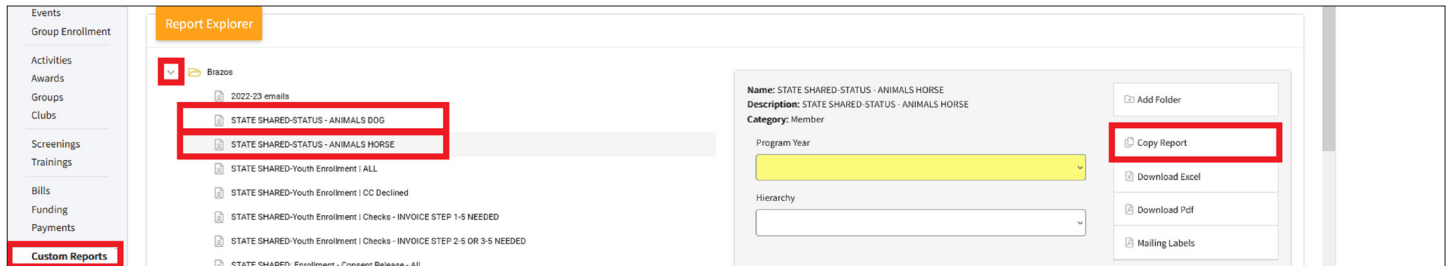


- Open the downloaded file in Excel to sort as needed. The Animal Enrollment Status column will provide status of the animal.

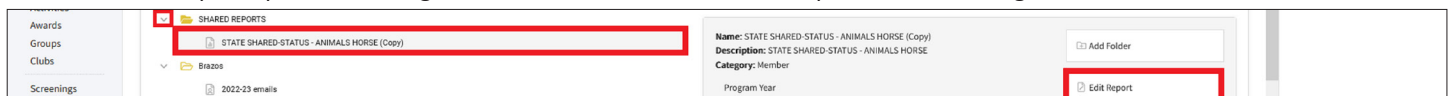
Family County	Animal Type	Animal Enrollment Status	Name: Last, First	Animal Identifier	Family Email	Member Id
Anderson	Dogs	Incomplete				
Anderson	Dogs	Active				
Anderson	Dogs	Active				
Anderson	Dogs	Active				
Anderson	Dogs	Active				
Anderson	Dogs	Active				
Anderson	Dogs	Active				
Anderson	Dogs	Active				
Anderson	Dogs	Active				
Angelina	Dogs	Submitted				
Angelina	Dogs	Submitted				

OPTIONAL - COPY AND EDIT SHARED CUSTOM REPORT

- Click the Custom Reports link in the navigational menu on the left side of the screen.
- Click the right arrow beside the county folder to open it if it's not already opened.
- Click on the report called **STATE SHARED-STATUS - ANIMALS DOG OR STATE SHARED-STATUS - ANIMALS HORSE**
- Click the Copy Report button on the right side of the screen.



- After the screen refreshes there will be a folder with the copied report listed in it.
- Click the report called **STATE SHARED-STATUS - ANIMALS DOG (Copy) OR STATE SHARED-STATUS - ANIMALS HORSE (Copy)**
- Click the Edit Report option on the right side of the screen to enter the report to make changes.



ANY EXTRA 4HONLINE REPORT COLUMNS ADDED TO THE REPORT COULD DISPLAY INCORRECT DATA OR DUPLICATE ROWS

The members of Texas A&M AgriLife will provide equal opportunities in programs and activities, education, and employment to all persons regardless of race, color, sex, religion, national origin, age, disability, genetic information, veteran status, sexual orientation or gender identity and will strive to achieve full and equal employment opportunity throughout Texas A&M AgriLife.