Groups and Group Enrollments

OVERVIEW

What is a Group?  What is a Group Enrollment?  Are these terms the same?
These terms are closely related, but are also very distinct and cannot be used interchangeably.

Group – this is a level of data organization in 4HOnline enrollment data that designates individual participants (by name) to be associated with a 4-H Group. Examples of 4-H Groups could include Ambassadors, County 4-H Council, Horse Committee, Robotics Team, etc. However, you also have to assign a “group” for the group enrollment forms – use one of the standard state groups setup for this purpose.

Group Enrollment – this is more correctly referred to a “group enrollment form”. This is a set of numbers that represent the actual number of participants (and information about those participants). A group enrollment form can be created in various ways, but in all cases it must be created after the event because that’s the only point at which you know who actually participated. Each group enrollment form must be linked to a “group.” It is strongly suggested that you use the state-created groups for these rather than creating new groups. This will be addressed further under the group enrollment section.

Points to consider when creating a group
Creating a Group to “hold” the participants of the event will include these benefits:
• Easy to communicate with participants for followup, evaluation, future marketing, etc.
• Having the individual participant data provides richer research and evaluation data.
• Preparies our system and participants for 4HOnline to serve as a permanent record/portfolio of their 4-H involvement.

When creating the group, keep the following in mind:
• The Group can be set up so that it’s only available to Managers (members would not be able to self enroll), or it can be set up so that members can self-enroll in the Group.
• Groups are not included in the standard Club Directory report.
• Managing enrollments in a Group will have nearly the same filtering and reporting capabilities as enrollments in a Club.
• Groups cannot store any charter data, like the Club records can.

Statewide Groups
Events that are STATEWIDE will be created by staff organizing the event. Local staff should then work with the event organizer to know if they should add participants to that group, or if the state staff working with the event will be doing that. Examples include: JOLT, State Horse Show, and Shooting Sports Education Instructors.

County Groups
These groups are County specific. In other words, they DO NOT cross counties or regions.
CREATING AND MANAGING GROUPS

✓ On the dashboard, click on the Groups icon.

✓ Notice that there are numerous state-level groups created for your use. The state-level groups begin with the word “County” so that they are easily identified in lists. Don’t recreate a group at a county level if it already exists at the state level.

✓ If you have ideas for additional groups that would be useful on a wider basis, please contact state admins before you just create one for your county. If lots of people will use the same group, it should be created at the state level for consistency and ease of use.

✓ To add a new county-level group, click the “Add Group” link in the upper left (below the dashboard icons).

✓ Be sure that you fill in the fields that are bolded as shown to the right:

✓ Title – When naming a group DO NOT include a year. You can reuse the same group from year to year. At rollover, members are “cleared out” for the current year, but remain in the archived data. To access, report and sort the data, you can select the 4-H year desired.

✓ Group Type – Choose Camp, Group or School.

✓ Delivery Mode – Choose appropriate delivery method and delivery mode alias.

✓ Report Method must be set to Individual in order for this to be available on a volunteer, member, or contact participation screen.

✓ Parent Group – leave at none.

✓ In most cases, you should check both questions about integration.

✓ Share this Group
  • with Managers – generally you will check this.
  • with Members – check this box if you want families to be able to self-enroll in this Group.

✓ Be sure to Save when you finish editing.
PROCESS FOR ADDING MEMBERS TO A GROUP

1. After logging in, on the [Search] screen of the [Enrollment] tab, use the search options to locate the members to be added to the group.

2. Click on the [Flag] check box next to each name to be added.

3. Click on the [Add Flagged to Group] button.

4. In the popup window, select the desired group.

5. Click on [Add to Group].

It is also possible to log in to an individual member and go to their [Participation] tab and add them to a Group. Another option is to click on a member’s name in the Search results screen and add Group membership via the [Member Options] popup panel.

At this time, it will mostly be staff who are adding participants to a group, not the family adding their family members themselves.

To view group membership and/or remove members from a group, click on the [Groups] tab on the [Search] screen.

ENTERING GROUP ENROLLMENTS (NO NAMES)

Top two reminders:

1. The capability for you to enter group enrollments to count on the ES237 will END on October 15, following the September 30 end of the 4-H year. Group enrollments for the previous year will need to be entered before October 15.

2. “Duplicates” are youth who have already been counted—either because they have an individual record (club members) or because they have been entered on a prior group enrollment record.
Adding a new group enrollment record
On the Dashboard, choose the Group Enrollment icon. This brings up a different Search screen at the top, with a top left corner option to “Add Group Enrollment”.

Screen 1: Program Information

1. Required fields are in bold: Program Name, Start/End dates, 4-H Year, Group, Del. Mode, Hours.

2. Be sure that your start/end dates are both within the program year (beginning AFTER Sept. 15 last year, ending BEFORE Sept. 15 this year).

3. Notice how the information you enter appears on the search screen above. Keep that in mind as you fill out the fields on this screen.

4. Groups: in many cases, the “group” designation may seem duplicative of the program name, curriculum, or description. Nonetheless, at the present time, each record has to be linked to a group. If you have not previously created the group, you can do it from this screen by clicking the “Create Group” button.

5. We strongly suggest that you use the state-created groups named “State: Camp: Group Enrollment Day Camp”; “State: Camp: Group Enrollment Overnight Camp”; “State: Group: Group Enrollment Special Interest”; etc.
However, if you feel that you need to create your own group:

**Group Type:**
- **Camp** = Either overnight or day, has to include a “camping” experience.
- **School** = happened IN school, IN a classroom.
- **Groups** = everything else. Don’t use “other”.

**Delivery Mode:**
Don’t use the others with group enrollments.

6. After you have created your group, that information will fill in both the Club/Group box and the Delivery Mode box. Enter the number of hours.

7. Select a project, and remember to click the Add Project button. Projects must be added one at a time. Be sure to click “Add Project” after each one.

8. Click “Continue >>” to go on to the next screen.

**Screen 2: Member Distribution**

1. **Gender:** This is the only place that you will enter in ALL participants. In the example at right, there were 30 kids, and 6 of them were club members (or had been recorded on a different program). The total NEW (unrecorded) youth for this program is 24.

2. **Ethnic/Racial:** Notice that Hispanic alphabetizes before Non-Hispanic, so it is on the left. Youth who are Hispanic would have a race of “White”. At this point, you record Ethnic/Race of only the 24 “new” youth. If you don’t know, subtract the duplicates out of Non-Hispanic White.

3. **Residence:** Again, only enter the “new” youth. If you don’t know who to subtract, do it generally by proportion. If Farm & Rural are basically 50-50, subtract the duplicates in the same way—half of them from each category.

4. **Grade:** Again, only the “new” youth. Remove duplicates as accurately as possible, or by proportion (like residence).

5. When you are finished, and all four totals are the same (24 in this example), you can click “Continue >>”. If your totals do not balance, you will get a somewhat helpful error message and will be required to adjust your figures before going on.

*Watch the labeling on the screen carefully, as 4HOnline does not use the “All” and “New” labels we are more familiar with. Note that after the first section you are to “remove duplicates”, or in other words, only enter “new” participants.*
Screen 3: Volunteer Distribution

1. This screen can be left blank if there are no “new” volunteers to record for the event. New volunteers are those who have not been previously recorded—either with an individual record, or on a previous group enrollment. There is NO provision for duplicates on this screen, as all recorded should be “new”.

2. Ethnic/race—indicate ethnicity and race separately for youth (still in K-12) and adult (above HS) volunteers.

3. Classification—Direct volunteers have contact with youth, indirect volunteers do not. Again, separate adult & youth volunteer sections.

4. Training Distribution—if you provide training to the volunteers that worked with this event, indicate what type of training (A, B, or C), and whether the attendees at the training were youth or adults.

** “Other Adults” would be a place to record the parents who attend a training with their kids.**

- When you are finished entering all the data, click the Submit Form box, and then click Save Form. If you do not “Submit”, the data will not be included on your ES237. Always Submit when you Save—you can go back into the record until Oct. 15 and make changes if you need to, even if it’s been Submitted.
- To change a record, on the Search screen, locate the record you want, and click Edit.
- If you do change a record, you will be required to Submit again, even though it was submitted once.

If desired, the Group Enrollment records can be exported to Excel for viewing by clicking on the [Quick Exports].

More detailed reports of Group Event data can be found under [Reports] [Manager Reports].

Standard ES-237 reports can be run at any time from [Reports] [Enrollment Reports] [Standard Reports]