Module 3 – Entering 4-H Members in the Database

In this lesson, you will learn how to:

- Enter 4-H members
  - Open the 4-H Member Screen
    - Enter Data in a Record
- The Second Address Screen
  - Enter Data
- The Affiliations/Year Screen
  - Enter Data
- The Affiliations/Project Screen
  - Enter Data
- The Mail Group Screen
  - Enter Data
- The Activity Screen
  - Enter Data
- The Guardians' Screen
  - Enter Data
- The Form Screen
  - Enter Data
- The Award Screen
  - Enter Data
- The E-Mail Screen
  - Enter Data
You learned in Module 1 how to open ED; and in Module 2 the basic functions of getting around in ED itself. Now you'll need to know how to enter 4-H member data.

Although you can enter Adult, CFS, and ANR member demographic data in their own member screen this Module will deal specifically with the 4-H data section of ED.

You may also enter non-4-H data here. However, there are some specific fields and tabs only available via their respective member screens that will need data entered. You will need to go to those screens to enter that specific data or select a specific tab.

To begin entering 4-H members
1. From the Main Menu, click on the 4-H button or the Data Entry button to display the 4-H member screen.

2. Using, the Find sequence locate the 4-H member record you want to work with.

   Note:
   - See Module 1 on how to do a Find.
   - You may find more than one record with this member’s last name, so use the rolodex to locate the correct 4-H Member record.
   - You can also use any field to do a search for a record.

3. Go to the next section The General Tab Screen to continue working with this record.
General Tab Screen

The General Tab screen stores any of the generalized information about this 4-H member. This area will describe the purpose of these fields. After you have finished the Demographic information you should complete this General Tab screen before moving on to any of the other screens. Some of these fields may have Default settings available, check the Defaults tab within the Setup screen.

1. Enter the 4-H members Nickname in the Nickname field. This field is optional.
2. Click in the Title field and enter a title i.e. Mr., Mrs., Miss or Dr.
3. Enter the Suffix field, i.e., Sr., Jr., and PhD. This field is optional.

HINT: In order to use the nickname on reports and labels select Yes on the Use nickname field found in the Salmon colored box at the lower left of the General Info screen.

4. Enter the Address in the information address fields, using all three fields if necessary; then press the Tab key.
5. Enter the zip code or choose one of the zip + City choices from the drop-down list. Also, enter the zip+4 field.

   ❖ Once you have made a choice, the City, State, and zip fields will automatically be filled in—a big advantage when you have several enrollments to enter into the database.

   ❖ If your zip data is not in the drop-down list, or you receive an error, you will have to click on the Setup button to go to the Setup section of the database and enter the data in the zip section before it will show up on a drop-down list. This will be covered in the Setup Lesson.

6. The County field should already have the default county name entered; just tab past this field if it is correct. Otherwise, click to bring up the drop-down list and scroll to click on the correct county name. Tab to the Township field and select a township name from the drop-down list.
7. The home (Primary) and work (Secondary) Phone fields may have the default area code for your County displayed. Tab to the next phone field and enter the prefix and phone number. These are optional fields.
8. Choose Yes or No from the pop-up list for the Unlisted (phone) field.
9. The Extension (Ext) field is optional.
10. The Cell Phone field is optional and self-explanatory.
11. The Mailing Status is a drop-down list. Scroll and click on one of the following options; Use Family address, Use mail label, Inactive Member, No mail. You can also just leave this field blank if you do not want to use any of the options. Although, you need to use these flags if you want to omit one of these mailing status types from an option in a General Find.

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The Use Family address option is used to put The ______ Family on the first line of the label for this person.

The Use mail label option will result in the placement of this record’s Mail Label text being placed on the first line on the label. This option works along with the Mail Label field in step 19.

The Inactive Member option is used in a General Find and will omit these people from reports if that option is selected on the "Setup" screen.

The No Mail option is used in a General Find and will omit these people from reports.

12. The Mail Label field is used to enter the text you want on the first line of any mailing label for this record as long as you have the mail flag set to Use Mail Label option.

13. The Birthday field is used to enter this person’s birthday in the format of: MM/DD/YYYY. For example for a birthday of September 3, 1995, you would enter: 09/03/1995.

   • The Age Field will automatically calculate and display the person’s age. This field is not modifiable.
   • The Age cal. field will automatically calculate and display the person’s age based on the date in the Setup section. These two may differ and the Age cal. field is not modifiable.

15. The E-mail field is for the person’s e-mail address, if available. This field is optional. E-mail addresses can be used to send out emails and newsletters. Attachments can also be sent out. More detailed E-mail information can be found in a separate document in the YDAE Extension Database Home Page.

16. The E-mail CC field is for a parent’s email address, if available. This field is optional. The CC field is used for the parent’s email address if a parent wants to be CC’ed whenever you email the member. Note: This field is being replaced by the include e-mail field on the guardian screen.

17. The School field will also display a drop-down list of available schools, Scroll and click on one of the School names listed.

18. The Beeper and Fax fields are optional and self-explanatory.

19. The Maiden Name field is use as a security question if anyone needs information on this 4-H Member.

20. The Override Eliminate Duplication is a Yes/No field. Click on Yes, if you do not want to eliminate duplication for this record based on duplication and No if you want to eliminate any duplicate records with the same last name, phone number, the zip, and zip+4. For example, if you have the Smith and Jones members living in the same household you normally would produce two labels even if you eliminated dups. When you set the “Override Eliminate Duplication” to “Yes” on all of the records for this household you now would only get one label. If you need to produce a label for a certain member in the family, leave this option set to “No”.

21. The Use nickname fields, is a Yes/No field. Click on Yes, if you want to use a nickname and click on No if you do not want to use a nickname.

22. The Override Last Name a Yes/No field. This field is used when family members living in the same house have a different last name. Generally when eliminating duplication, ED looks at last name, phone, zip and zip +4 however with this field set to “Yes”, last name is left out of the equation.

23. The E-mail only is a Yes/No field. Click on Yes, if you want to use only E-mail addresses for any record that has an email address and don’t create a label for them. You will still get a label for
members who do not have email. Use No, if you, want to use the actual address label for everyone on your list.

24. The **Middle Initial** is a Yes/No field. Use No, if you do not want to use the middle initial even though you have typed it in the Middle field in the demographic area.

25. The **Guardian Pull down List Include** button is selected if you want to have the Guardian name displayed on the Last Name drop down list when you get to the Guardians screen. The Guardian will not show on the drop down list in the Guardian screen if you do not click on the Include button here or if you press the Delete button. This is a feature to keep the Guardian drop down list short and quicker to retrieve Guardian names. The remove will take a guardian off of the pull down list. This gives you the ability to keep your guardian pull down list as short a possible. Also clicking remove doesn’t remove the guardian from either the database or the links to their children. It only takes them off of the pull down list.

26. The **Comment** field allows you to enter any necessary information about this person that will be helpful only to the Extension office. This information can be printed only in reports from the General List/Comment or General List/Rels/Comment option. There is more discussion in the Member Printout section.

27. The **Last update** date displays the current date which will be stored with this record until the next time it is updated and the **Updater** field displays the pc userid, of the person doing updates to this record. These fields cannot be modified.

You are now done entering demographic and General data for this 4-H member. Check to make sure you have entered the correct information then continue to the next tabbed screen (Federal) and enter needed data for this 4-H member.
The Federal Screen

The Federal Tab screen stores any of the ethnicity information about this 4-H member which is required by Federal law. To display this screen choose the Federal Tab on the General Info screen.

Notice when you clicked on the Federal Tab that the demographic information about this 4-H member is still displayed on the screen. Yet by just clicking on the Rolodex you can display another member’s record. Some of these fields may have Default settings available.

1. The Residence Code field is a drop-down list used to describe the type of populated area where this person resides. Scroll and click on one of the following options:
   - Central city > 50K
   - Farm
   - Rural/Town < 10K
   - Suburb > 50K
   - Town/City 10-50K

2. The Gender Field is a pull-down menu. Click to choose either Female or Male from the drop-down list.

3. The Ethnicity field requires you to select Hispanic if this member is of Hispanic descent. Or, select Not Hispanic if they are of any other ancestry.

4. The Race field is a list used to enter the race of this person. Click to choose any of the following options; American Indian, Asian, Black/African-American, Hispanic, White or Balance. You will need to click on all types of races that this 4-H member has indicated they are a part of. When you click on any option an X will be displayed in the box beside the race selection. If a 4-H member’s race or race combination is not listed use the Balance option. To remove an X from an option click again inside the box.

5. The Grade field is a drop-down list and is used to enter this 4-H member’s grade in school. Scroll and click on one of the following options: PK, K, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, PH, NS, and S. Pk is Pre-Kindergarten, K is Kindergarten, PH is Post High School, NS is Not in School, and S is Special.
The Second Address Screen

The Second Address tab screen stores data on the second address of a member if they plan to reside in two different physical locations during the 4-H year. To display this screen choose the 2nd Addr Tab on the General Info screen. You do not need to fill out this screen if there is not a second address for this member.

Use this section if: a child will be living with another relative or is in college for the months designated on this screen; or an adult may be on vacation for several months or living at a winter home and wanting mail forwarded for a period of time.

1. Type the second address for a person if they have one. Enter the data in the fields much like the General Info screen.

2. You will have to enter the Start Month from the pull-down list.

3. Enter the End Month from the pull-down list.

4. Select Yes for 2nd Address field for this field to become active.

5. Once you are finished entering data on this screen, press the next tab to continue to enter data for this person.
The Affil/Year Screen

When you click on the Affil/Year tab you will display the 4-H Member Affiliations screen. Notice the person's demographic information is automatically carried over to the Blue area of this screen. The portal file (the white sub-window) has fields that will allow you to enter information on the fields: Year, Club, Project, Project Tenure, Division Description, Level, Proj, Break, a Completed field if the project was completed and a Find Group field.

Several fields already have entries in the drop-down lists; check the General and 4-H tab within the Setup screen if new entries will need to be added. If the field is in blue your information is not editable.

Notice in the Year field the most recent year of activity will displayed first with past years in calendar-year order. You can use the scroll bar on this portal to view past years' affiliation data.

As you enter data, some of the fields will be drop-down lists and you can select the data from that list. In the year field you will have to type in the information. Remember it is better if you use the Tab key to go from field-to-field. Using the tab key will automatically display drop-down lists when you tab to those fields which will make data entry quicker.

1. Click on the Primary club field to scroll and select the primary club code. Please note that in the new version of ED you need to click in the green area after changing the Primary club. Clicking in the green area accepts the Primary Club change you just made. FileMaker needs this to update the record with this change. Failing to do this step, the club will not self enter in the current primary club.
   - If you select the primary club field, the club will be displayed in the club field every time you create a new project.
   - If you forgot to enter a primary club code on several members you can use a script to enter the primary club for you. Or, if you have a group of previously entered members, this script will update them.
Do a “Find”, select a “Club code” in the “Club” field and enter a year for the project year field.

Select the script to update all found records in this club. The script is found under the “Scripts” menu option, then “Update Primary Club” option.

When the dialog box is displayed follow the directions to complete the process.

2. Click on the New Project button to add a new project record for this member. The blank project record will be displayed at the top of the list with the current enrollment year already entered. If you use the Primary club field, The New Project button will use auto fill.

Now is the time to remind you “If you need to enter a new project make sure you are typing the data in a blank record” otherwise you are changing the record.

3. The Year will auto fill with the current year. You can edit the year if needed.

4. Press the Tab key to display the drop-down list in the Project field.

Don’t forget you can use the speed search on this field. I.e. if you want to quickly get to the livestock project, type L and it will display that option the list starting at the L, then scroll to the livestock option.

5. Scroll and Click on the project you are entering.

6. Scroll and Click on the Club name drop-down list if it is not already displayed. (See step 1).

7. Scroll and Click on the Project Tenure drop-down list. This field is for the number of years this person has taken this project. It can be different than the tenure field for the persons total years in 4-H. For example, a member may have been in 4-H for a total of three years and this will be the first year that the member is taking computers.

Steps 8, 9, and 10 are used to further breakout your projects for the fair if your county requires data for these fields.

8. Scroll and click an option on the Division Description list.

9. Scroll and click on the Level drop-down list to add a level.

10. Scroll and click on the Proj. Break drop-down list to add a level.

11. Click on Yes/No to select one option in the Completed (a project) drop-down list. You can leave this field blank until you start to enter results on the Exhibit screen after your County Fair. What you enter in the Exhibit screen will be displayed in this field.

12. Click on the Manual field to select an option if this project has a manual associated with it and you have entered the manual information in the Set Up section.

13. Repeat the above steps to enter any new projects for this member.

14. When finished, go to any tabbed screen to continue entering data for this 4-H’er.
The Affil/Year Screen

When you click on the Affil/Project tab you will display the 4-H Member Affiliations screen. The only difference between this screen and Affil/Year screen is how the Project portal records are displayed. The Affil/Year displays the project records with current year at the top and in descending order. The Affil/Project displays the project records in alphabetical order.

The Mail Group Screen

There will be times when you will need to add a new mailing group to an existing person’s record. You will first need to find the person(s) to make sure they are in the database. Once found you will be able enter them in as many mailing groups as you need.

When you click on the Mail Group tab you will display the Mail Group screen. This screen is the same screen that will be displayed if you were to click on the Mail Groups button from the Main Menu or from any other General Tab in the Youth, Leader, CFS, or ANR sections.

Since this is a screen that can be accessed and used from any section of the database it has its own Module. See the Module 6 entering new Mailing Groups and more information on this Mail Group tab.
The Activity Screen  
(Activities/Trainings screen)

Notice the person’s demographic information is carried over to the blue area of this screen. The portal file (the white sub-window) has fields that allow you to enter information on them. If there are already Activities or Trainings entered, they will be displayed in the white portal section.

The Activity fields already has a drop-down list available, check the 4-H tab within the Setup screen if new forms will need to be added.

Since you already have your member on the screen, clicking on the Activity tab displays the screen below. Follow the steps below to enter Activity or Training for this member.

You may find and sort here as well as on any other screen.

1. Click on the **Activity Hours** field and enter the current year if it is not displayed. (found in the green area of the screen).
2. Click on the **New Activity** button to enter a new activity or Training.

**NOTE:** As long as a blank Activities/Trainings record is visible you can click in the **Activities** area of that record to display the drop-down menu to select one of the activities. As you enter more records for this person throughout the years the blank record may disappear from the portal view area. Therefore, I find it is easier to train myself to click on the “New Activity” to display a blank record before entering data. I also like to use the “New Activity” button to ensure myself that I am indeed starting with a blank record and not wiping out historical data.
3. Click on the **Activities/Trainings** field to display the drop-down list so you can choose an activity or training.
4. The **Points** field will automatically display any points for this activity or training if you have previously entered the points in the setup area for Activities/Trainings.
5. The **Date** field will automatically display today current date which is taken from your machines system date.
6. The **Year** field will automatically display the year indicate at this activity or training occurred in the year displayed.
7. Type in the **Hours** field the time this member has spent on this activity or training; i.e. 1 or 1.5 are examples.
8. The **Type** field will automatically display either Activity or Training depending on the Activities/Trainings code you selected in step 3.
9. Repeat these steps enter other activities/trainings in which this member is involved.

Press the **General tab** to return to the **General** or screen. Or continue on to the next tab, the Guardian Tab.
The Guardian Screen

Once again the person's demographic information is carried over to the blue area of this screen. The portal file (the white sub-window) has fields that allow you to enter information on them. If there are already Guardians entered, they will be displayed in the white portal section.

Note: Remember the Guardian Pull down List Include field you needed to complete at the beginning of this module? Here is the place where it plays the most important role. This button is selected if you want to have the Guardian name displayed on the Last Name drop down list when you get to the Guardians screen. The Guardian will not show on the drop down list in the Guardian screen if you do not click on the Include button in the 4-H member’s General screen. This is a feature to keep the Guardian drop down list short and quicker to retrieve Guardian names.

Note: The Aunt, Father, Foster Father, Foster Mother, Grandfather, Grandmother, Guardian, Husband, Mother, Parents, Step-Father, Step-Mother are available in the drop-down list for the relationship field.

1. Since you already have your member on the screen, clicking on the Guardian tab displays the Guardian screen. Follow these steps to enter the relationship between the guardian and this member.
2. Click on the Last Name field to Display and Select any record found. If the last name is the same as the 4-H member and you used the include button there should be records displayed.

Note: Once a name is found it will also bring up some of the demographic information for the guardian.
3. Or, Click on the Full field to bring up a complete list of adults in the database so you can scroll and select a guardian for this 4-H member.
   Note: The Full field will need to be used if the guardian has a different last name than the 4-H member.

4. The Relationship field will display a drop-down list for you select the relationship between the member and the guardian.

5. The Report Order field needs to be selected. This indicates whose name will be printed first on the reports for this 4-H member if more than one guardian is entered. When reports are printed out this guardian could be printed first, second, third, etc. up to 10 places by the order you select here.

6. Inc mailings fields indicated a Yes or No field. If you select Yes, then this guardian will get all the mailings that they 4-H member gets. If you select No, then they will not get the mailings.

7. Inc e-mail will allow you to bring in the Guardians when you are sending an e-mail to the 4-H member.

8. Repeat these steps for other guardians you need to enter for this 4-H member.

If you need to Delete a guardian from this 4-H members records refer to Module – 2 “Deleting a Portal Record (A Related Record)” section. Please note that deleting a Guardian link on this screen doesn’t delete the Guardian’s record.

Press the General tab to return to the General or screen. Or continue on to the next tab, the Form Tab.
The Form Screen

The Form tab will take you to the Form screen. This screen will allow you to keep track of several forms, for example, Pesticide, Beef or Pork Quality Assurance forms, Photo Release, or a Horse & Pony participation Release forms.

As you know, you should already have the 4-H members demographic data displayed in the blue area of the Forms screen. We can then begin to enter any information that will help to keep track of this member’s form(s) that have been issued to them or any you have gotten from them.

The Form field already has a drop-down list available, check the General tab within the Setup screen if new forms will need to be added.

1. Click on the New Form button to bring up a blank record.
   
Note: As long as a blank Form record is visible you can click in the area of that record to display the drop-down menu. As you enter more records for this person throughout the years the blank record may disappear from the portal view area. So, I find it is easier to click on the “New Form”. I also like to use the “New Form” button to ensure myself that I am indeed starting with a blank record and not wiping out previously entered data.

2. Select a form from the list that is automatically displayed.

3. The Sent Date field is automatically entered and is taken from the machines system date.

4. The Signed field requires a Yes or No answer.

5. The Year field is automatically entered with the current year; you can change this if needed.

6. The Signed date field is used to indicate the date the form was signed by the guardian or necessary person associating this form with the 4-H member that the necessary compliance has been met on this date. The format to use should be: MM/DD/YYYY.

Module 3 – 15
Using the Group Enroll Button

If you should happen to get several members forms in at the same time, you can enroll them as a group. For example, if I got several members forms in for a horse and pony release I would follow the steps below to enroll them as a group.

7. **Find** all the members (usually one club). You can use the **General Find** button for this purpose.
8. Scroll through the list (using the Rolodex) and using the **Omit** button to remove any member that did not turn in the form. (watch the **Found**: records change as you use the Omit button).
9. Click on the **Form** drop down list to select the form you need. This is located to the right of the Orange Group enroll button.
10. Click on the **Group enroll** button.
11. Select **OK** at the confirmation message window “You are about to enroll this whole group in your current form. This cannot be undone. Are you sure this is what you want to do? Cancel or OK.
12. Use the **Rolodex** or slider to go to the first record.
13. Click in the **Signed date** field and enter the date that this form was signed. The format to use should be: MM/DD/YYYY.
14. Go to the next record and enter the Signed date for this member.
15. Repeat the process until all records are dated.

**Hint:** A really quick way to enter the date for this field if the date is all the same for each record is:

1. Enter the **date** on the first record. (MM/DD/YYYY).
2. Highlight only the date in the Signed date field.
3. Press **Ctrl c** to copy the info.
4. Press **Ctrl ↓** to go to the next record.
5. Press the **Ctrl v** to paste the info into the record.

If you follow steps 2 through 5 for the next record(s) will be displayed with the cursor in the proper field.

**Note:** The **Transfer Find and Print Outs** button displayed in the Orange area is used for printing reports for this current section you are in. Like here it would be for form reports.

Press the **General tab** to return to the **General** or screen. Or continue on to the next tab, the Award Tab.
The Award Screen

The Award tab will take you to the Award screen. This screen will allow you to keep track of several awards that a 4-H member may be earned during their 4-H career, for example, a Citizenship award forms. As you know, you should already have the 4-H members demographic data displayed in the blue area of the Award screen.

The award field already has a drop-down list available, check the General tab within the Setup screen if new award records will need to be added.

If you need to Delete an award from this 4-H members records refer to Module – 2 “Deleting a Portal Record (A Related Record)” section.

1. Click on the New Form button to bring up a blank record.
   Note: As long as a blank Award record is visible you can click in the area of that record to display the drop-down menu. As you enter more records for this person throughout the years the blank record may disappear from the portal view area. So, I find it is easier to click on the “New Award”. I also like to use the “New Award” button to ensure myself that I am indeed starting with a blank record and not wiping out previously entered data.

2. Select a Award from the list that is automatically displayed.
3. The Date field is automatically entered and is taken from the machines system date.
4. The Year field automatically displays the current year and can be changed if needed.

Note: The Transfer Find and Print Outs button displayed in the Orange area will be explained in the Module for Printing.

Since this is a screen that can be accessed and used from any section of the database it has its own Module. Press the General tab to return to the General or screen. Or continue on to the next tab, the Email Tab.
The E-Mail Screen

There will be times when you will need to send email out to a member list. You will first need to find the list to make sure it has records listed. Once found you will be able to send email messages.

When you click on the **E-mail** tab you will display the E-Mail screen. This screen is the same screen that will be displayed if you were to click on the **E-Mail** button from the **Main Menu** or from any other **General Tab** in the Youth, Leader, CFS, or ANR sections.

Since this is a screen that can be accessed and used from any section of the database it has its own Module. See the **Module 14 Using the E-Mail Feature in ED** and more information on this **E-Mail tab**.

The Printouts Screen

Since this is a screen that can be accessed and used from any section of the database it has its own Module. The **Print Outs** tab will be explained in the Module for Printing.

Press the **General tab** to return to the **General** or screen. Or continue to explore on your own.