WEB NEERS

USER MANUAL

Clemson University — Youth Learning Institute

USDA — United States Department of Agriculture — National Institute of Food and Agriculture

Cornell University Cooperative Extension

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We want to acknowledge and sincerely thank all who contributed to the Web-Based Nutrition Education Evaluation and Reporting System (WebNEERS). Each 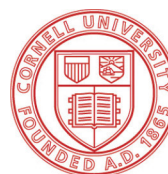of the individuals listed below made important contributions. Without them, we would not have the system that we have today.

WEBNEERS PROJECT TEAM

- **Jason Eichelberger, Clemson University (Lead Developer)**
- **Stephanie Blake, USDA, NIFA (Project Lead)**
- Helen Chipman, USDA, NIFA
- Julian Brinkley, Clemson University
- Katherine Cason, Clemson University
- Stephen Bateman, Clemson University
- Toby Kirkland, Clemson University
- William Bristow, USDA, NIFA

Former Members
- Jason Rikard, formerly with Clemson University
- John Mayhak, formerly with Clemson University
- Shannon Baldwin, Clemson University

WEBNEERS USER MANUAL REVISION TEAM - 2015

- **Tiffany Williams, University of Georgia (Team Lead)**
- BeVerly Sims, University of Arkansas, Little Rock
- Korrin Vanderhoof, The Ohio State University
- Susan Finneseth, North Dakota State University
- Tony Benavente, North Carolina State University

Contributing Editors
- Stephanie Blake, USDA, NIFA
- Marly Diallo, USDA, NIFA

BETA TESTING TEAM

DEVELOPMENT AND IMPLEMENTATION: 2010-2013

Core Team – Phase 1
- **Stephanie Blake, USDA-NIFA (Team Lead)**
- Dwayne Watson, Colorado State University
- Michelle Scott-Pierce, Cornell University
- Steve Williams, University of Missouri
- Tiffany Williams, University of Georgia

Multiple Round Testers – Phases 2 & 3

- **Stephanie Blake, USDA, NIFA** (Team Lead)
- **Steve Williams, University of Missouri** (Lead Tester)
- **Tiffany Williams, University of Georgia** (Lead Tester)
- Abby Dunbar, West Virginia University
- Andrea Talbot, University of New Hampshire
- BeVerly Sims, University of Arkansas
- Brenda Sheik, Oklahoma State University
- Danielle Hammond, Texas A&M University
- Justine Hoover, Iowa State
- Latresha Brady-Pinkston, Auburn University

Single Round Testers – Phase 2 only

- Clarissa Barcinas, University of Guam
- Debra Garrard, Oklahoma State University
- De'Shoin York-Friendship, Southern University
- Karen Barale, Washington State University
- Katie Mulligan, University of Rhode Island
- Linda Drake, University of Connecticut
- Margaret LaShore, Michigan State University
- Margaret Weital, College of Micronesia
- Peggy Martin, Iowa State
- Rebecca Fiame, American Samoa Community College
- Rose Castro, Northern Marianas Community College
- Terence Martin, Alabama A&M

SYSTEM MAINTENANCE AND ENHANCEMENTS: 2014-2015

- **Stephanie Blake, USDA, NIFA** (Team Lead)
- **Barbara Johnson, Cornell University** (Sub-Group Lead)
- **Brenda Sheik, Oklahoma State University** (Sub-Group Lead)
- **Chelsea Bishop Smith, Texas A&M University** (Sub-Group Lead)
- **Korrin Vanderhoof , The Ohio State University** (Sub-Group Lead)
- **Michelle L. Scott-Pierce, Cornell University** (Sub-Group Lead)
- **Tiffany Williams, University of Georgia** (Sub-Group Lead)
- **Tony Benavente, North Carolina State University** (Sub-Group Lead)
- Belle Swanby, University of Minnesota
- BeVerly Sims , University of Arkansas
- Debbie Goddard, Tennessee State University
- Laura Bolt, University of Kentucky
- Lisa Perkins, University of Wisconsin
- Marly Diallo, USDA, NIFA
- Samantha L Dvorak, South Dakota State University
- Steve Williams, University of Missouri
- Susan Finneseth, North Dakota State University

Former Testers

- Karen Franck, University of Kentucky
- Kathy Orchen, formerly with Rutgers, the State University of New Jersey
- Latresha Brady-Pinkston, formerly with Auburn University
- Lorna Ewart, Cornell University
- Sharman Charles, Louisiana State University
- Sharon Paradis, University of Maine
- Sue Snider, University of Delaware

WEBNEERS WORKGROUP

- **Katherine Cason, Clemson University (Chair)**
- Amanda Scott, Texas A&M University
- Angela Abbott, Purdue University
- Candance Gabel, University of Missouri
- Dwayne Watson, North Carolina State University
- Helen Chipman, USDA, NIFA
- Karen Barale, Washington State University
- Karen Craig, Tuskegee University
- Kimberly Klinger McNabb, University of Florida
- Mary Kay Wardlaw, University of Wyoming
- Michelle Scott-Pierce, Cornell University
- Mira Mehta, University of Maryland
- Steve Williams, University of Missouri
- Stephanie Blake, USDA, NIFA
- Suzanne Stluka, South Dakota State University

SPANISH RECALL TRANSLATION TEAM

Primary Review Team

- **Janet Brun, Rutgers, the State University of New Jersey (Team Lead)**
- Abner Velazquez, Rutgers, the State University of New Jersey
- Jaymie Santiago, Rutgers, the State University of New Jersey
- Laura Igarteburu, Rutgers, the State University of New Jersey
- Luz Santana, Rutgers, the State University of New Jersey
- Paulina Beristain, Rutgers, the State University of New Jersey

Secondary Reviewers

- Denise Benoit-Moctezuma, University of Maryland, College Park
- Diana Huertas-Miranda, University of Maryland, College Park
- Edgar Moctezuma, University of Maryland, College Park
- Ellen Howard de Perez, University of Maryland, College Park
- Omar Lugo, USDA-NIFA

YOUTH EVALUATION COMMITTEE

Kindergarten-2nd Grade Revision Team

- **Audrey Adler, Rutgers University (Co-Chair)**
- **Melissa Maulding, Purdue University (Co-Chair)**
- Char Byington, University of Idaho
- Elise Gurgevich, Penn State University
- Kathryn Yerxa, University of Maine
- Maria Carmen Lambea, The Ohio State University
- Marilyn Townsend, University of California
- Megan Ness, North Dakota State University
- Olga Santiago, Michigan State University
- Wendy Wolfe, Cornell University
- Yenory Hernandez, Texas A&M University

Expert Reviews and Cognitive Interviews (Phase 2 & 3)

- **Ben Chamberlain, Michigan State University (Co-Chair)**
- **Olga Santiago, Michigan State University (Co-Chair, State Project Leader)**
- Audrey Adler, Rutgers, the State University of New Jersey (Member, State Project Leader)
- Brittney Linton, Clemson University (Project Research Assistant)
- Elise Ann Gurgevich, Pennsylvania State University (Member, State Project Co-Leader)
- Julie Cooper, Pennsylvania State University (Member, State Project Co-Leader)
- Kerry Silverman, Rutgers University (Project Research Assistant)
- María Carmen Lambea, Ohio State University (Member, State Project Leader)
- Meenal Rana, formerly with Michigan State University (Project Research Assistant)
- Wendy Wolfe, Cornell University,(Member, State Project Leader)
- Yenory Hernández-Garbanzo, Clemson University (Member, State Project Leader)

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Staff: Alison Brown; Danielle Anderson; Kathy Orchen; Lenora O'Dell; Shailja Mathur; Sheetal Bhatia; Zachary King;
Nutrition Graduate Students: Andrea Aguilar; Elizabeth Ramirez; Het Desai; Joyce Senior; Kattia Blanco; Maciel Ugalde; Maria Catalina Aragon;
Nutrition Undergraduate Students: Abigail Davis; Alyssa Grigg; Anna Hayden Whitworth; April Becket; Autumn Brooks; Bonnie Alexander; Brianna Williams; Brooke Butterworth; Carolyn Musselwhite; Cassandra Watford; Devin Hicks; Elizabeth Bennet; Heather Britt; Karly Hogsed; Kathlee Sanders; Katheryn Watcher; Kerry Boyd; Meghan Carney;
Mehreen Mian; Molly Nielsen; Paul Leonard; Rylie Carpenter; Susan Bowles

Selection of Questions by Grade Level (Phase 1)

- **Ben Chamberlain, Michigan State University (Co-Chair, 6th-8th and 9th-12th)**
- **Heli Roy, Louisiana State University (Co-Chair, Kindergarten-2nd and 3rd-5th)**
- Amy Davidson, University of Vermont (9th-12th)
- Audrey Adler, Rutgers, the State University of New Jersey (6th-8th)
- Donnie Love Cook, Alabama A&M University (3rd-5th)
- Josh Phelps, Oklahoma State University (9th-12th)
- Justine Hoover, Iowa State University (Kindergarten-2nd)
- Larissa True (PhD Student), Michigan State University (Literature Review)
- Lillie Monroe-Lord, University of the District of Columbia (Kindergarten-2nd)
- Lois V Sanders, University of the Virgin Islands (6th-8th)
- Maria Carmen Lambea, Ohio State University (3rd-5th and 6th-8th)
- Marion Halim, Lincoln University (6th-8th)
- Melissa Maulding, Purdue University (9th-12th)
- Olga Santiago, Michigan State University (6th-8th)
- Scottie Misner, University of Arizona (3rd-5th)
- Shelley Swenson, University of Florida (3rd-5th)
- Virginia Zoumenou, University of Maryland, Eastern Shore (Kindergarten-2nd)
- Wendy Wolfe, Cornell University (6th-8th)
- Yenory Hernández-Garbanzo, Clemson University (3rd-5th)

COMMUNITY NUTRITION EDUCATION (CNE) LOGIC MODEL WORKGROUP

- **Helen Chipman, USDA, NIFA (Chair)**
- Jamie Dollahite, Cornell University
- Jeff Olson, West Virginia University
- Karen Barale, Washington State University
- Krystal Smith, West Virginia State University
- Linda Drake, University of Connecticut
- Peggy Martin, Iowa State University

Introduction

About the Web-Based Nutrition Education Evaluation and Reporting System (WebNEERS)

WebNEERS is a secure system designed, hosted, and maintained by Clemson University. It is accessed through the Internet via Internet Explorer, Firefox, Google Chrome, and Safari web browsers. It captures the positive impacts of the Expanded Food and Nutrition Education Program (EFNEP) and other nutrition education programs, such as the Supplemental Food Assistance Program – Education (SNAP-Ed). The system provides a variety of reports that are useful for management purposes, provides diagnostic assessments of participant needs, and exports summary data for State/Territory and National assessment of program impact. It also incorporates new reporting elements such as the EFNEP 5-Year Plan/Annual Update, the EFNEP budget sheet and budget justification, and the social ecological framework of the Community Nutrition Education (CNE) logic model. WebNEERS is used in over 800 locations throughout the 50 states, the District of Columbia, and the 6 U.S. territories. It was launched in October 2012 as an update and expansion of the Nutrition Education Evaluation and Reporting System version 5 (NEERS5), developed in 2006.

About EFNEP

The Expanded Food and Nutrition Education Program (EFNEP) is a Federal Extension (community outreach) program which began in 1969. It is funded by the U.S. Department of Agriculture's (USDA) National Institute of Food and Agriculture (NIFA) and it assists limited resource audiences in acquiring the knowledge, skills, attitudes, and changed behavior necessary for nutritionally sound diets, and to contribute to their personal development and the improvement of the total family diet and nutritional well-being.

EFNEP operates in all 50 states, the District of Columbia and in American Samoa, Guam, Micronesia, Northern Marianas, Puerto Rico, and the Virgin Islands through the 1890 and 1862 Land Grant Universities and Colleges (LGU). Extension professionals train and supervise paraprofessionals (peer educators) and volunteers to recruit and educate low-income families and low-income youth in community settings. Paraprofessionals deliver a series of hands-on, interactive lessons to program participants. Lessons are evidence-based and tailored to meet the needs of the audience. Lessons focus on the core areas of EFNEP: Diet Quality and Physical Activity, Food Resource Management, Food Safety, and Food Security.

About SNAP-Ed

The Supplemental Nutrition Assistance Program – Education (SNAP-Ed) is a federal/state partnership that supports nutrition education for persons eligible for SNAP benefits. The Healthy, Hunger-Free Kids Act of 2010 established SNAP-Ed as the Nutrition Education and Obesity Prevention Grant Program by the USDA Food and Nutrition Service. The Act calls for SNAP-Ed to include an emphasis on obesity prevention in addition to nutrition education. Activities must be evidence-based and delivered through individual and group-based strategies, comprehensive multi-level interventions, and/or community and public health approaches. SNAP-Ed efforts may also address environmental and policy level interventions. National, State, and local coordination and collaboration is strongly encouraged and recommended. Since 1988, Land-Grant Universities have been a primary provider of SNAP-Ed. They reach intended audiences by coordinating with state and local partners and with other contractors. Other contractors are state public health departments, food banks, tribal programs and local health

organizations. The goal of SNAP-Ed through the Land-Grant University System is to provide educational programs and conduct social marketing campaigns that increase the likelihood that people eligible for SNAP benefits will make healthy food choices within a limited budget and choose physically active lifestyles consistent with the *Dietary Guidelines for Americans* and MyPlate.

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Section 1 – The System – An Overview

The System – An Overview

The Web-based Nutrition Education Evaluation and Reporting System (*WebNEERS*), is a data collection, management and reporting system. The system was generated and is maintained through a Cooperative Agreement between the United States Department of Agriculture (USDA), National Institute of Food and Agriculture (NIFA) and Clemson University. WebNEERS collects quantitative data and qualitative data. The quantitative data consists of demographic and program outcome information (reported behaviors pre- and post-education) about program participants and staff. The qualitative data consists of program impacts and success stories. It also incorporates other reporting elements such as the Expanded Food and Nutrition Education Program's (EFNEP) 5-Year Plan/Annual Update, the EFNEP budget sheet and budget justification, and the social ecological framework of the Community Nutrition Education (CNE) logic model. *WebNEERS* has been adopted by many Supplemental Nutrition Assistance Program – Education (SNAP-Ed) programs, run through the Land-Grant Universty (LGU) systems because of its value and utility.

The Development, Hosting and Maintenance

WebNEERS is a secure web-based system designed, hosted, and maintained by Clemson University. *WebNEERS* was developed to ensure flexibility, decreasing reliance on stand-alone software packages and/or operating systems.

Accessing WebNEERS

WebNEERS can be accessed, by approved users, through any website accessible system, including computers, iPads, Tablets and Smartphones. *WebNEERS* is compatible with the following web browsers*:

- Internet Explorer – version 8 or higher
- Firefox
- Google Chrome
- Safari

Minimum specifications**:

- 1.5MB download speed
- Windows XP

If the web browser and/or the version number of the browser being used to access the Internet is unknown, contact the computer system administrator within the county, region, or university, to ensure the computer systems meet the minimum requirements.

**The minimum specifications will allow a user to successfully access/use the system. However, the faster the computer and the connection speed, the better the user's experience will be.*

WebNEERS IP Address

The Expanded Food and Nutrition Education Program (EFNEP) and the Supplemental Nutrition Assistance Program – Education (SNAP-Ed) each have a unique WebNEERS IP Address into which their respective program data are entered. This keeps the data from the respective programs separate.

Each IP Address has been created as a **H**yper**T**ext **T**ransfer **P**rotocol **S**ecure (https) site. The https ensures that the information that passes between the web server and the client is secure.

The https address for **EFNEP** is:
> https://www.webneers.net

The https address for **SNAP-Ed** is:
> https://snap.webneers.net

System Levels

There are three system levels within *WebNEERS*: Federal, Institute (university), and Region (local).

Federal Level/Users

The Federal level refers to the United States Department of Agriculture, National Institute of Food and Agriculture. The Federal level interface enables national leadership to collect/aggregate data, and to manage and report on the program.

Federal level users have the ability to run reports, to export national data, and to create and manage federal checklists, questions, subgroups (adult and youth), filters, and public assistance programs.

SNAP-Ed: *The Federal level is only used for setup purposes to establish SNAP-Ed accounts. NIFA does not collect, manage or report on WebNEERS data for SNAP-Ed.*

Institute Level/Users

The Institute level refers to the university level data, which is analogous to the former State Reporting System (SRS). The Institute level interface enables each LGU to define operating parameters, to collect/aggregate data, and to manage and report on the program.

The Institute level users are tasked with creating the environment for Region level users. They can create regions for Region level users to enter data into; manage their various regions, subgroups, filters, checklists, and public assistance programs; create and

manage annual updates/5-year plans, budgets and budget justifications; and create new users. Institute level instructions in this manual have red headers.

The Region level refers to the region level data, which is analogous to the former County Reporting System (CRS5). A region may represent one county or it may represent multiple counties. The Region level interface is the only level at which program participant data can be entered and personal identifiers (name, address, telephone number, etc.) accessed.

The following information can be entered from the Regional level:
- Adult data – including demographics, food recalls, and behavior checklists
- Youth Data – including group demographics and behavior checklists
- Staff Data – including professional, paraprofessional, and volunteer demographic information and hours
- Program Impacts
- Delivery Sites & Partnerships

Note: *To provide technical assistance, Institute level users may have access to the Region level interface.*

System Components

WebNEERS incorporates region, university, and federal components of the previous Nutrition Education Evaluation and Reporting System (NEERS5) (adult and youth demographic information, pre-post 24-hour recall and behavior checklists on enrolled adults, grade specific evaluations for enrolled youth, etc.). In addition, *WebNEERS* has added the ability to enter, submit and for the Federal level to review the EFNEP 5-Year Plan/Annual Update, the EFNEP budget and budget justification, and the socio-ecological framework of the Community Nutrition Education (CNE) logic model.

Becoming an Approved User

At the heart of *WebNEERS* is a robust permissions system that allows for the creation of users who can serve various roles within the system. Most functions that are available in *WebNEERS* can be managed with user permissions. Through this permissions system, access can be granted or limited for each user at the discretion of the Institute or Region level user. This level of customization is intended to address the needs of the various entities that provide nutrition education programming and the variety of roles and responsibilities of their respective staff. Permission management is addressed in Section 2: Users and Permissions Management.

<u>Specific example of permissions use:</u>
Users can be granted the ability to create new adults, only. When this user logs into the system the only section they are able to access is the adult section, and they are only allowed to enter new records; the deleting and editing functionality is hidden from them.

Important Features

Tabs

Tabs are utilized in *WebNEERS* to create a less crowded workspace. Tabs look and function like the tabs of file folders. The active tab connects directly to the form you can edit while inactive or hidden tabs are grayed out. You cannot edit an inactive or hidden tab until you open it/make it active. The active tab has black font; inactive tabs have blue font.
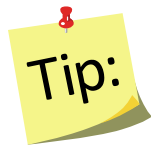
Tip: To quickly move between tabs hold the shift key and press the left or right arrow key on the keyboard. The tabs will open and close according to the directional arrow the user pressed.

Labels

In accordance with 508 compliance, all input fields in *WebNEERS* have labels associated with them. Users with visual handicaps can use screen readers to enter data into forms. Labels allow users to change the current form field by clicking on the label. For instance, if a new staff member is being entered, clicking on the **First Name** label causes the associated first name field to become active; any subsequent typing would be contained within that field.

Dialog Boxes

Dialog boxes are used throughout *WebNEERS* to keep screens from becoming cluttered. For example, in **Adults** and **Youth Group** records, dialog boxes are used to manage the data in the remarks section.

Closing Dialog Boxes

Dialog boxes can be closed in multiple ways. The most common ways are to either select the "**X**" icon at the top right corner of the dialog box or to press the ESC key on the keyboard.

> **Note:** *Closing a dialog box without saving the information will result in the changes made being deleted.*

Buttons

Different buttons will appear at the bottom of dialog boxes and data entry screens. These buttons will serve to either **Save** the changes, **Create** the item, or **Cancel** the process (exit the dialog or the data entry screen) without saving the information.

Form Validation

The form validation system implemented in *WebNEERS* employs real time validation and notifications, allowing the user to receive error messages real-time. Below are the main components of the validation system.

Required Fields

All required fields are outlined in red. The outline will remain, whether or not the user has successfully entered data into the field.

Error Notifications

These notifications are displayed when a required field is skipped or the data contained in the field does not meet the required format.

> **Note:** *These notifications will "pop up" in the upper right of the input field for text based entry or drop downs, and will display directly above checkboxes and radio buttons. They will also appear above the tab containing the data field in need of correction.*

> **Note:** *Error notifications are always red and serve only to alert the user that they cannot continue until the error is properly addressed.*

Invalid Submission Behavior

If a user attempts to submit a form without completing the required fields or addressing the error notifications, he/she will automatically be redirected to the first field that is incorrect and an error notification will be displayed indicating the necessary steps to complete the form. If this field is located on a tab that is not currently active, the user will be first directed to the tab and then shown the appropriate error message.

Note: *In cases of invalid submissions, all other data which is correct will not be lost. The user will be given the opportunity to fix the issues and continue without needing to re-enter any data.*

Active Fields:

Form fields that users are currently editing are highlighted in yellow.

Icons

Icons are used in place of text to simplify the WebNEERS screens. These icons facilitate the user in completing an intended task.

Describing the Icons

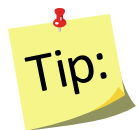|		
☑	**Select**	This icon indicates an item is selected and will be included
☐	**De-select**	The absence of a check indicates the item is not selected and will not be included
🖊	**Manage**	The manage icon is used on the **Home page** to indicate the link is for a page where data may be created/added, edited or deleted
▤	**Report**	The report icon is used on the **Home page** to indicate the link is for a page where a report can be created
⚙	**Setup**	The setup icon is used on the **Home page** to indicate the link is for a page where system management functions takes place. It is also used in the adult and youth group checklist sections to add additional question sets, when such sets are available *Note:* *Additional question sets can only be added in the checklist sections if they are created by an Institute level user and made available to that Region*
▨	**Tables**	The tables icon is used on the **Home page** to indicate the link is for a page where system tables are located
⊕	**Create/Add**	The create/add icon is used to bring up another screen that allows the user to create or add a new record
🔧	**Edit**	The edit (wrench) icon is used to bring up another screen that allows the user to edit the information in a record
⊗	**Delete**	The delete icon is used to delete a record from the database *Note:* *Before selecting the delete icon, please make sure the item selected/the information highlighted should be deleted. Once an item has been removed there is no way to restore it; you cannot "undo" a deletion.*
📅	**Calendar**	The calendar icon enables the use of a calendar pop up to select a date for the date field located to the immediate left of the button
!	**View Food Details**	The view food details icon is used to show the details of food items (food group data, nutrients, and weights and measures) within a recall and in the foods database table
🔍	**Preview**	The preview icon is used to preview the data in a report
🖨	**Print**	The print icon is used to either open the browser's print dialog box or to create a PDF. *Note:* *In some cases the print icon will specify "PDF" or "Print" to the right of the icon*

	Sort	The sort icon is used to sort the data in a table in ascending and descending order
		Note: Select the sort icon once to sort the column in ascending order (a,b,c… 0,1,2…), select a second time to sort in descending order (z,y,x… 9,8,7…). The sorted column will show one arrow. If it is sorted ascending, an up arrow; descending, a down arrow.
Home >>	Home	The home text, which appears in the light-gray bar at the top of the screen, is used to return the user to the home page
<< Back	Back	The back text, which appears in the light-gray bar at the top of the screen, is used to return the user to the previous page
	Download	The download icon is used to download a comma separated value file (CSV) of the data

Tip: If users hover their mouse arrow over an unlabeled icon, a description of the icon's function or purpose will pop up.

Screen Layout

All major functions of *WebNEERS* are represented on the home screen. A user with full permission can click on all items on the home screen; a user with limited permissions may only be able to click on some items on the home screen (any which are not grayed out). Permissions are discussed in greater detail in Section 2.

Regional Level Home Screen

The majority of the Region level web site real estate is broken down into three columns:
- Adults
- Youth Groups
- Staff

Each of these topic areas are broken down into categories of tasks which allow the user to manage data, generate reports, or setup local information to enhance the functions of *WebNEERS* and meet the local level needs (see below for additional details). At the bottom of each column are additional links that include **Region Users** and **Data Management** (Adults column), **Tables** (Youth Groups column), and **Annual Updates**, **Checklists** (Staff column).

Note: See the screenshot of the *Region level* **Home page** at the end of this section.

Institute Level Home Screen

The majority of the Institute level web site real estate is broken down into three columns:

- **Annual Update/5-Year Plan**, **Summary Reports** (adult, youth, staff), **Browse** (adult, youth, and staff)
- **Checklists** (manage and reports), **Setup** (subgroups, filters, public assistance)
- **Users** (manage), **Regions**, **Reporting Years**, **Tables**, and **Export Data**

Note: *See the screenshot of the Institute level **Home page** at the end of this section.*

Home, Breadcrumbs, Account Management, and Logout buttons

The very top of WebNEERS is a series of gray bars that contain important navigation controls within the system.

Top Dark Gray WebNEERS Navigation Bar

- ***WebNEERS*** logo – clicking here will always return the user to the ***Home page***.
- **Help** – clicking here will take you to options for help - links to: user manuals, the system administrator, and the help desk where you can ask/answer questions.
- **WebNEERS Manuals** – clicking here will take you to the online user manuals.
- **User Name and User Type** – clicking here will open the user information screen. You can update your name and password. You can also view the regions you have access to (Region level users only) as well as confirm your assigned permissions. The user type appears in parentheses after your user name.
- **Countdown Clock** – the countdown clock shows how much time remains until you are logged out of the system based on inactivity. Every time you click a button or move to a different screen the timer resets.
- **Logout** – clicking here will log you out of the system when you are finished.

Middle Medium Gray WebNEERS Navigation Bar

- **Home** – This medium gray bar is where the breadcrumb trail will appear throughout the system. The breadcrumbs allow the user to see where they are in the system and maneuver back to previous screens or to return directly to the ***Home page*** without selecting the browser "*back*" button.

Note: *The breadcrumb trail should only be used to navigate backwards once data has been saved. If you use the breadcrumb without saving, the data you entered will be lost.*

Bottom Light Gray WebNEERS Navigation Bar

- **Institute** – This is the institute that you are associated with in WebNEERS.

Region Dropdowns

- o **Region Dropdown** – If you are part of more than one region, use this dropdown menu to choose the region that you want to view data or enter data into.
- o **Reporting Year Dropdown** – Choose the reporting year you wish to view. Region data from previous reporting periods is VIEW ONLY. Data can only be entered in the current reporting period.

Institute Dropdowns

- o **Reporting Year Dropdown** – Choose the reporting year you wish to view. Data from previous reporting periods is VIEW ONLY. Data can only be entered in the current reporting period.

SNAP-Ed:

Data for previous reporting years is locked during the submission process. SNAP-Ed data is not submitted to NIFA so if users switch to a previous reporting year it is important to be cautious because their data is editable.

Home Page Functions

Entering and Editing Data – MANGAGE ✏️

Users can manage data by adding new adults, youth groups or staff, updating information currently in the system, or, when necessary, deleting information. **Managing individual records is only available at the Regional level.**

Manage ADULTS:

Adding new adults and/or editing adults already in the system are completed by selecting the **Manage Adults** link. WebNEERS includes pre- and post-education recalls and checklists for individual adults. These can be completed as the record is added or edited.

Managing recalls or checklists already in the system or adding an exit recall or checklist without going into the **Manage Adults** link, can be completed by choosing **Manage Recalls** or **Manage Checklists**.

> *Note:* *For step-by-step instructions on the process of adding or editing an adult participant, see Section 5: Managing Adults, Adding, Editing, and Reporting of this manual.*

Manage YOUTH GROUPS:

Adding new youth groups and/or editing youth groups already in the system are completed by selecting the **Manage Youth Groups** link. WebNEERS includes pre- and post-education checklists for individual youth. These can be completed as the record is added or edited.

Managing checklists already in the system or adding exit checklists without going into the **Manage Youth Groups** link, can be completed by choosing **Manage Checklists**.

> *Note:* *For step-by-step instructions on the process of adding or editing a youth participant, see Section 6: Managing Youth, Adding, Editing, and Reporting of this manual.*

Manage STAFF:

Adding new staff and/or editing staff already in the system is completed by selecting the Manage Staff link.

Note: *For step-by-step instructions on the process of adding or editing staff, see Section 4: Managing Staff, Adding, Editing, and Reporting of this manual.*

Note: *No adults or youth groups can be entered until staff are added to WebNEERS.*

Reviewing and Aggregating Data - REPORTS

A variety of reports and management tools are available from WebNEERS.   These tools include:

Mailing Labels

The ability to generate mailing labels for adult participants, youth groups, and staff/volunteers.

Email Lists

The ability to generate comma-separated value files which contain the email addresses of adult participants, youth group leaders, and staff/volunteers. These files can be used to generate electronic communications with current and/or past contacts.

Summary Reports

The ability to generate detailed summary reports aggregating the data entered in the system. Understanding the reports available within WebNEERS will help you use them to best meet your local programming and reporting needs. All of the reports are useful in program management.

Note: *For more detailed documentation about what is contained in each of the summary reports please see the appropriate section:*
- *Section 5 – Adults*
- *Section 6 – Youth*
- *Section 4 – Staff*

Lists

The ability to generate reports based on data entered into the system. The content of the information contained within the reports vary by category (adults, youth groups, staff), as well as the criteria used to generate the requested reports (date ranges, subgroups, filters, etc.).

For more detailed documentation about what is contained in each of the lists please see the appropriate section:
- *Section 5 – Adults*
- *Section 6 – Youth*
- *Section 4 – Staff*

Reviewing and Aggregating Data - REPORTS

A variety of reports and management tools are available from WebNEERS.   These tools include:

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The ability to generate detailed summary reports aggregating the data entered in the system. Understanding the reports available within WebNEERS will help you use them to best meet your local programming and reporting needs. All of the reports are useful in program management.

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The ability to generate reports based on data entered into the system. The content of the information contained within the reports vary by category (adults, youth groups, staff), as well as the criteria used to generate the requested reports (date ranges, subgroups, filters, etc.).

For more detailed documentation about what is contained in each of the lists or reports please see the appropriate section:
- *Section 5 – Adults*
- *Section 6 – Youth*
- *Section 4 – Staff*

Browse Screens

The ability to generate a table with aggregated values for key data points by region and using filters. The content of the information contained within each table varies by category (adults, youth groups, staff).

Note: *For more detailed documentation about what is contained in each of the browse screens please see the appropriate section:*
- *Section 5 – Adults*
- *Section 6 – Youth*
- *Section 4 – Staff*

Personalizing WebNEERS - SETUP ⚙

The setup features for each section (adult, youth groups, staff) allow users to identify and personalize **WebNEERS** to meet their data entry and tracking needs.

Subgroups, Filters, Public Assistance Sets

Where needed, <u>Region level</u> users are able to create subgroups or filters for adults or youth groups and to create public assistance programs for adults

Note: *When a subgroup is created, an option to create a related filter is also available. It is suggested to select this option if you would like to filter data by the subgroup.*

Note: *For more information on setting up the system to better meet local needs, see Section 3: Setup: Customizing the System to Meet Local Needs.*

Defaults for Adults and Youth Groups

To simplify data entry, <u>Region level</u> users are able to establish defaults for new entries. This might include the completion of certain fields within an adult or youth group record.

Note: *For more information on setting up the system to better meet local needs, see Section 3: Setup: Customizing the System to Meet Local Needs.*

Transfer Responsibilities

The **Transfer Responsibilities** option is available to move/reassign participants from one staff member to another without accessing each individual record.

Note: *For more information on Transferring Responsibilities, Section 4: Manage Staff, Adding, Editing and Report.*

Personalizing WebNEERS - SETUP ⚙

Subgroups, Filters, Public Assistance Sets

Where needed, Institute level users are able to create subgroups or filters for adults or youth groups and to create public assistance programs for adults

Note: *When a subgroup is created, an option to create a related filter is also available. It is suggested to select this option if you would like to filter data by the subgroup.*

Note: *For more information on setting up the system to better meet local needs, see Section 3: Setup: Customizing the System to Meet Local Needs.*

Region

The Institute level user is able to manage the Region level databases (add and edit). This includes creating new regions; assigning/removing users, subgroups, filters, public assistance, question sets, etc. to/from regions or reviewing which of the aforementioned are included in a particular region; or, when necessary, deleting regions.

Additional Home Page Features

The Institute level user is able to view the ID number of the region, the counties of which the region reflects, the migration status (if data has been migrated from one reporting year to the next), and has the ability to export the data for use outside of the *WebNEERS*.

Note: *The migration and export options are not visible to a Region level user unless the Institute level user gives the region permission to do so.*

User

The user feature enables the logged in user to manage (add, edit or make inactive) other users he/she created. Region level users can only manage other region level users in the region(s) they are assigned; Institute level users can manage other Institute level users and Region level users. The ability to add or edit users and/or edit user permissions may or may not be provided to all **WebNEERS** users.

Note: *For more information on the user feature, see Section 2: Users and Permissions Management for more information.*

Tables

The tables section should not be confused with the description of the **Tables** provided in **Helpful Hints for working in WebNEERS** below. The tables feature provides access to the information used to analyze diet recall data and poverty information on participants. These tables provide the background data and are provided for information purposes only. They are not editable at either the Institute level or Region level. All edits are done by the WebNEERS System Administrator. The date of last update is provided for each table under the title.

Table Version Info

This provides you with direct links to where table information was collected.

View Foods

The View Foods tables, formerly called the "food dictionary", displays a listing of food items available for inclusion in the diet recalls. The View Foods table displays the description, additional description and the Food Code. Foods items can be searched by description or food code. The data can be printed or downloaded and saved to an external device.

Daily Recommendations

The Daily Recommendations tables display information used to calculate daily food group recommendations based on age. From the Daily Recommendations screen, note the date Last Updated. Select the Year dropdown to view information for another year.

Recommended Calories

The Recommended Calories table provides estimated amounts of calories needed to maintain energy balance for various gender and age groups at three different levels of physical activity. From the Recommended Calories screen, note the date Last Updated. Select the Year dropdown to view information for another year.

USDA Food Patterns

The USDA Food Patterns table suggest amounts of food to consume from the basic food groups, subgroups, and oils based on caloric intake. From the USDA Food Patterns screen, note the date Last Updated. Select the Year dropdown to view information for another year.

Dietary Reference Intakes

The Dietary Reference Intakes (DRI) tables provides the recommended daily intake levels for nutrients by age, gender, and pregnancy status. These recommendations are considered sufficient to meet the requirements of 97–98% of healthy individuals. From the Dietary Reference Intakes screen, note the date Last Updated. Select the Year dropdown to view information for another year.
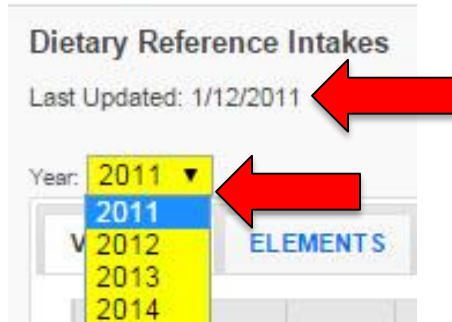
Poverty Guidelines Table

The Poverty Guidelines table is used to calculate percentage of poverty data for EFNEP families. From the Poverty Guidelines Table screen, note the date Last Updated. Select the Year dropdown to view information for another year.
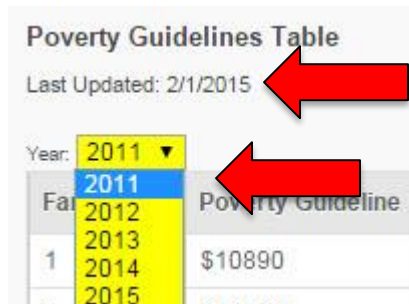
Annual Update/5-Year Plan

The annual update/5-year plan feature enables the user to manage (add and edit) information related to other elements of programming. The type of information available varies by level.

Region Level

The Region level user is able to add or edit program delivery sites/community partnerships and program impact information. The program delivery sites/community partnerships section asks the user to provide the number of different sites reached in a given program year and document the number of partnerships that have been formed. The program impact section captures qualitative success stories on program delivery.

Institute Level

The Institute level user is able to manage (add and edit) the university's 5-Year Plan/Annual Update, budget and budget justification. These data were collected through the Request for Application (RFA) in years past. This section also allows Institute level users to manage program impact and delivery sites/community partnership data submitted by Region level users and entered by Institute level users.

Checklists

The checklist feature enables Institute level users to add question sets, based on questions existing in the *WebNEERS* database of questions, or add new questions for inclusion in question sets to be used at the Region level. Both Institution and Region level users have the ability to view the available checklist sets and to run checklist related reports

> *For more information on creating question and/or question sets for use at the Region level, see Sections 5 and 6 to learn more about Questions and Checklists.*

Helpful Hints for working in WebNEERS
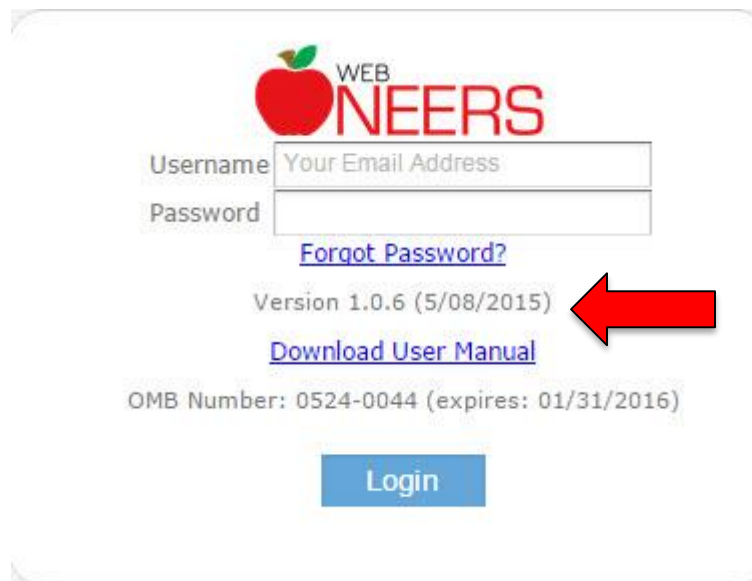
The section below contains guidance and helpful hints to assist to better understand the system, the data entry and review process.

Data Backup

WebNEERS Data is backed up automatically at least three times each day.

WebNEERS Version Number

The version number and release date are displayed on the log in page for WebNEERS below the "forgot password?" link. This lets a user know the last time an update was pushed and changes were made to the software.

The version number and release date are also displayed at the bottom of each WebNEERS page after users log into the system. To access the "version" page and see the list of changes: log into the system, scroll to the bottom of the page, and click on the current version number. This will open a new page with information on the update.

Tables

Tables in *WebNEERS* are dynamic. Some of the main features include:

Search

A live search feature helps users find specific records:

1. Click into the search input box in the head of a table

    SEARCH: [   ]

2. Enter the keywords of the search – as the user types, the table will begin to populate with results that best match what is being typed

The search includes every column of the table automatically, allowing the search to indiscriminately search the contents of the table without requiring a predetermined selection of a given column. A message "*No matching records found*" indicates a match for the text typed cannot be found; verify the search parameters and try again.

Note: *If the table is set to only show 10 rows out of a possible 100, the search will still include all 100 rows.*

Note: *The only place within **WebNEERS** that the live search feature does not work is in the add foods section of the adult recalls. This table is too large to use a live search so users must click "enter" on their keyboard after entering the search term(s) to process the request.*

Sorting

Most tables in *WebNEERS* can be custom sorted real time, allowing users to quickly sort information in any desired order.

1. Click the title of the column to be sorted. By default, *WebNEERS* generally attempts to sort data by ID, if one exists.
2. The first time the title is clicked, the arrow icon will change from both up and down (⬍) to up (▲) to indicate the table is sorted on that column in ascending order.
3. If you click the title again, it will toggle the sorting from ascending to descending order and display a down arrow (▼).

Moving between pages

If the number of rows in a table exceeds the number of entries set to show on a page, the table will automatically paginate the resulting data. In order to navigate between these pages, click the left or right arrows located at the bottom right corner of the table.

Selecting the number of entries per page   SHOW 25 ▼ ENTRIES

The number of rows displayed in the table will depend upon the number selected in the dropdown box on the top right corner of the table. Changing the value in the dropdown box will automatically re-paginate the table.

Performing Data Entry

Use of Tab Key

To speed up data entry, the user may choose to move between form fields by pressing the tab or enter key on his/her keyboard. If the user is on the last input field of a screen that uses the tab or enter key, he/she will automatically be forwarded to the next data entry tab, provided the user is not currently on the last tab of the page.
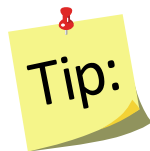
Tip: To select/deselect check boxes or to select items in a dropdown box, click the space bar on your keyboard.

Remarks

Adults and **Youth Groups** have remarks boxes that are hidden from normal view. If the record includes remarks, it will have **Comments Available** in red text to the left of the remarks button.

Comments Available ⊕ Remarks
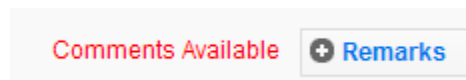
Cancel and Save Buttons

The **Cancel** and **Save** buttons for each data entry screen are located at the bottom of the page and aligned to the left. These buttons will **Cancel** or **Save** any edits made anywhere on the form, not just the visible tab. For instance, if a new adult is being entered and the user fills out the **Contact Info** tab and moves to the **Entry Data** tab and then selects **Save**, the information contained on the **Contact Info** tab will be saved in addition to the information on the **Entry Data** tab, even though it is not currently visible.

*The system is set up to best work by clicking the **Save** button only when the user is completely finished adding or modifying a record.*

*On pages with tabs to divide content there is only one set of **Cancel** and **Save** buttons. These buttons will **Cancel** or **Save** the entire form, not just the visible tab.*

For adults and youth groups, addresses cannot be verified and checklists and recalls cannot be added until the record is saved for the first time. The first save establishes the adult or the youth group in the system. Up until the first save, the cancel button can be used to prevent an errant record from being added. After the adult or youth group is established, clicking save will save and close the record and clicking cancel will cancel any data entered after the last time the user clicked save.

Calendar

Dates on data entry and reporting screen are masked to only allow for proper entry. Dates must always be entered in MM/DD/YYYY format. Users can choose to manually

type the date themselves or select the blue calendar icon () beside the field to select one from a calendar drop down.

Phone Numbers

Phone numbers are masked in a similar fashion to dates. They must be entered as (999) 999-9999.

Screenshots

The Home Page: Regional Level

Adults
- Manage Adults
- Manage Recalls
- Manage Checklists
- Verify Addresses
- View Adult Errors

Reports
- Adult Mailing Labels
- Email List (CSV)
- List of Families by Staff Member
- Recall List Report
- Adult Checklist Review
- Adult Summary
- Adult Diet Summary
- Adult Checklist Summary
- Subgroup List
- Filter List
- Public Assistance List

Setup
- Defaults for New Adults
- Subgroups
- Filters
- Public Assistance

Data Management
- Migrate Data
- Export Data

Users
- View Users
- Add User
- View Pending Users

Youth Groups
- Manage Youth Groups
- Manage Checklists
- Verify Addresses
- View Youth Errors

Reports
- Youth Mailing Labels
- Email List (CSV)
- Group Detail Report
- Group Names by Leader
- Group List
- Group Leader Summary
- Group Review by ID
- Youth Checklist Review
- Youth Summary
- Youth Checklist Summary
- Subgroup List
- Filter List

Setup
- Defaults for Youth Group
- Subgroups
- Filters

Tables
- Table Version Info
- View Foods
- Daily Recommendations
- Recommended Calories
- USDA Food Patterns
- Dietary Reference Intakes
- Poverty Guidelines Table

Staff
- Manage Staff
- Manage Hours
- View Staff Errors

Reports
- Staff Mailing Labels
- Email List (CSV)
- Status
- Staff List
- Volunteer List
- Profile Summary

Setup
- Add Staff (Data is Read-only)
- Transfer Responsibilities (Data is Read-only)

Annual Update/5-Year Plan
- Manage Program Impacts
- Edit Delivery Sites and Partnerships

Checklists
Adult
- View Adult Checklist Sets

Youth
- View Youth Checklist Sets

Reports
- Adult Checklist Set Report
- Youth Checklist Set Report
- Adult Question List Report
- Youth Question List Report
- Adult Question Detail Report
- Youth Question Detail Report

Note: *If a Region level user has restricted permissions, some of the buttons above may be grayed out (not selectable).*

SNAP-Ed: *SNAP-Ed users do not have access to the verify address option under Adults and Youth Groups. These options are grayed out (not selectable).*

The Home Page: Institute level

Annual Update/5-Year Plan
- Manage Annual Update / 5-Year Plan
- Manage Program Impacts
- Manage Budget Files / Justifications
- Manage Delivery Sites and Partnerships

Summary Reports
Adult
- Adult Summary
- Adult Diet Summary
- Adult Checklist Summary

Youth
- Youth Summary
- Youth Checklist Summary

Staff
- Staff Summary

Browse
Adult
- Browse Adult Summary
- Browse Adult Diet Summary
- Browse Adult Checklist Summary

Youth
- Browse Youth Summary
- Browse Youth Checklist Summary

Staff
- Browse Staff Summary

Checklists
Adult
- Manage Adult Checklist Sets
- Manage Adult Questions

Youth
- Manage Youth Checklist Sets
- Manage Youth Questions

Reports
- Adult Checklist Set Report
- Youth Checklist Set Report
- Adult Question List Report
- Youth Question List Report
- Adult Question Detail Report
- Youth Question Detail Report

Setup
Adult
- Adult Subgroups
- Adult Filters
- Adult Public Assistance

Youth
- Youth Subgroups
- Youth Filters

Reports
- Adult Subgroup List
- Youth Subgroup List
- Adult Filter List
- Youth Filter List
- Adult Public Assistance List

Users
- View Users
- Add User
- View Pending Users

Institute Regions
- Manage Regions
- Add Region

Reporting Years
- Manage Reporting Years
- Manage Reporting Dates
- View Feedback Report

Tables
- Table Version Info
- View Foods
- Daily Recommendations
- Recommended Calories
- USDA Food Patterns
- Dietary Reference Intakes
- Poverty Guidelines Table

Data Management
- Export Data
- Migrate Data

Note: *If an __Institute level__ user has restricted permissions, some of the buttons above may be grayed out (not selectable).*

Section 2 – Users and Permissions Management

Users and Permissions Management

Creating New Users

A "user" in WebNEERS is someone who as access to log into the system and perform various functions such as adding, editing, or deleting data/information. When you create a user account it gives that person access to the system. This is completely separate from adding him/her as a staff person. See Section 4 for information about managing staff.

1. Select **Add User** from the ***WebNEERS Home page***
2. Enter the new user's **Email** address.
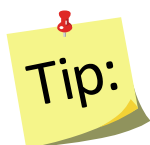
> **Tip:** An email address can be used once within the EFNEP version of WebNEERS and once within the SNAP-Ed version, but it cannot be used multiple times within the same version of WebNEERS. If an email address has already been used, check the "View Users" section to see if he/she already has an account.

3. Enter a **Verification Code**

> **Note:** *The verification code can be anything that you choose, but it will need to be provided to the user in a separate email or alternative means of communication, as the email generated by* ***WebNEERS*** *will not provide the verification code. This is done to ensure the security of the system.*

4. Enter the user's **First Name**
5. Enter the user's **Last Name**
6. Select the **User Type**, <u>Institute</u> or <u>Region</u>

Institute User

   a. Institute Users can skip to permissions step.

Region User

   b. Region Level Users need to be assigned to their appropriate regions(s).

7. Select or de-select the *permissions to be granted* the user
8. Select **Save** at the bottom of the page
9. Click OK to confirm the creation of this new user.
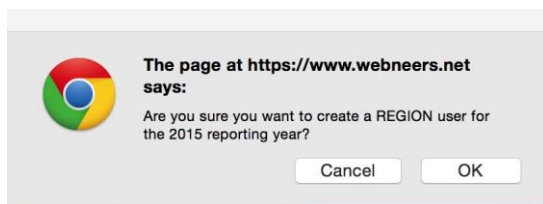
> **Note:** *It is important that the region to which the user will be assigned is created prior to any users being added. The user can be edited to include the regions after the region has been added, however, adding the region first, saves time and effort.*

User Permissions

Institute Level

Institute level user permissions include the ability to add, edit or delete annual updates/5-year plans, budget sheets, budget justifications, subgroups, filters and public assistance, as examples. Institute level users also have the ability to give Region level users "Read Only" access to data. These permissions are listed separately and, if selected, will allow Region level users to view data but not add, edit, or delete data.

Region Level

Region level user permissions include the ability to add, edit, and delete adult participants, youth groups, staff, subgroups, filters and public assistance, as examples. Review the list of permissions available and strategically select the permissions to be granted or withheld from any given user.

Changing Permissions

Occasionally it is important to adjust the permissions that are granted to a given user. When permissions need to be added or removed from a user, the Institute level or Region level user (typically the person who created the user), who has been granted access to allow changes to permissions, can, in real time, change another user's access levels.

*For example, if the ability of a user to manage adults is removed, the tabs on the home screen will turn grey and will no longer be clickable. The internal workings of **WebNEERS** will also block the user from manually typing web addresses that would allow access to this portion of the system.*

Note: *Changing and assigning user permissions is an advanced feature. New users should proceed with caution when changing user permissions. It is recommended that you use the default user permissions for new institute level and new region level users.*

1. Select **View Users** from the **WebNEERS Home page**
2. Select the **Edit icon** (   ) next to the user whose permissions are to be edited.
3. Select **Rights** tab
4. Select (   )or de-select (   ) the permissions of the user
5. Select **Save** at the bottom or top of the page

Changing Region Access

Region users are able to view, change, and grant access to only the regions they are assigned. Users may need to have the Region to which they have access changed or they may have added responsibilities in a second (or more) Region.

1. Select **View Users** from the **WebNEERS Home page**
2. Select the **Edit icon** (   ) next to the user whose access is to be edited.
3. Select **Region** tab

4. Select (☑)or de-select (☐) the Region(s) to which the user will have access
5. Select **Save** at the bottom or top of the page

Password Management

All users must register with a unique password, which will be encrypted and known to only the registered user.

Changing Current Password

WebNEERS offers the user the option of managing his/her own password.

1. Select the login information (nifanutritionhealth@gmail.com (Region User)) in the dark gray bar
2. In the second box of information enter your **current password**.
3. Enter the **new password** and re-enter the password
4. Select the **Update Password** button to save the change

Forgot Password?

If the password is forgotten, at the Login screen, the registered user can reset it>

1. Select **Forgot Password?**

2. Enter your username (email address)
3. Click **Get Password.**

A temporary password will be forwarded to the registered email address. The email will come from **EFNEP Admin** or **SNAP-Ed Admin** depending on the system you are trying to access. It may take several minutes for the password notification to come through.

> **Note:** *Please do not click **Get Password** more than once. Check your junk mail if you have not received an email from EFNEP/SNAP-Ed Admin in your inbox.*

After users log in with a temporary password, they should change their password back to something they can remember. This process can also be used to periodically update or manually change a password.

> **Note:** *A user being able to change his/her own password is a default permission. If you create custom permissions, the user will need to be granted the permission to "change password"*

Removing Users

As staff transition out of their role with **WebNEERS**, user access needs to be removed to ensure the confidential information of program participants and other staff are protected. Removing staff can be completed at the Institute or Region levels.

1. Select **View Users** from the **WebNEERS Home page**
2. Select the **Delete icon** ( ) next to the user to be deactivated
3. Select **Ok**, when prompted "*Are you sure you want to inactivate this user?*"

> **Note:** *The user will remain in the system, but will no longer be able to access the system. He/she also will not be listed on the main **View Users** page. To view inactive users, click the View Inactive User button on the top left.*

Reactivating Users

A user who was accidentally removed from **WebNEERS** or whose access needs to be reestablished can be reactivated at the Institute or Region levels.

The Process

1. Select **View Users** from the **WebNEERS Home page**
2. Click the [🔍 **View Inactive Users**] button on the top left.
3. Select the **Plus icon** ([+]) next to the user to be reactivated
4. Select **Ok**, when prompted "*Are you sure you want to reactivate this user?*"

> **Note:** *The user will disappear from the list of inactive users and move to the list of active users. To view the active users, click the "**View Active Users**" button on the top left.*

Changing Regions

Region Level

Users who have been granted permission to access more than one <u>Region</u>, can switch between the approved regions on their **Home page**.

Note: *It is important that users with multiple Region assignments carefully monitor the Region he/she has logged into to ensure the data is not entered into the wrong system. Once the data is entered, it cannot be transferred from one Region to another; reentry of the data will be required.*

1. Select the **Down arrow icon** located to the right of the light gray bar at the top of the **Home page**
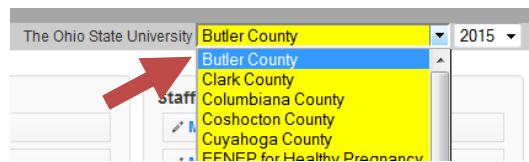
2. Select the region you would like to access
3. Select **Ok**, when prompted "*Are you sure you want to switch to region "……" "*

Note: *After the user completes this process he/she will be in the Region selected. This can be verified in the light gray bar at the top of the **Home page**. There is no discernible difference between the Region pages which makes it critical that users with access to multiple regions verify that they are in the correct region before conducting any work in **WebNEERS**.*

Changing Years

All users have the option to view the data from the current year as well as data from previous reporting years. This can be valuable if you need to print reports from previous years or access old records.

Note: *EFNEP users will only be able to view previous year data as it is locked upon federal submission and cannot be edited; SNAP-Ed users will be able to view and edit so extra care should be taken when switching between years.*

1. Select the **Down arrow icon** located to the far right of the light gray bar located at the top of the **Home page**
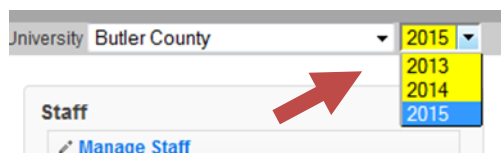
2. Select the **Year** you would like to access
3. Select **Ok**, when prompted "*Are you sure you want to switch to context of year "……" "*

Note: *After the user completes this process he/she will be in the year selected. This can be verified in the light gray bar located at the top of the **Home page**. There is no discernible difference between the home pages. Differences will appear in the data and the reports. For example, in the EFNEP system, previous year data cannot be added, edited, or deleted.*

Registration Process for New Users

Staff who are added as users to *WebNEERS* will receive an email generated from the system requesting the user to register. The email will look like the information contained below. If the staff does not receive the email in his/her inbox, the staff person should review their "*junk*" or "*trash*" folder, as some email systems identify the email from *WebNEERS* as spam or other high-risk email.

Note: *As a reminder, the verification code **will not** be included in the email and needs to be provided to the user by the staff member who is creating their account.*

1. Select the link in the **Join WebNEERS** email.
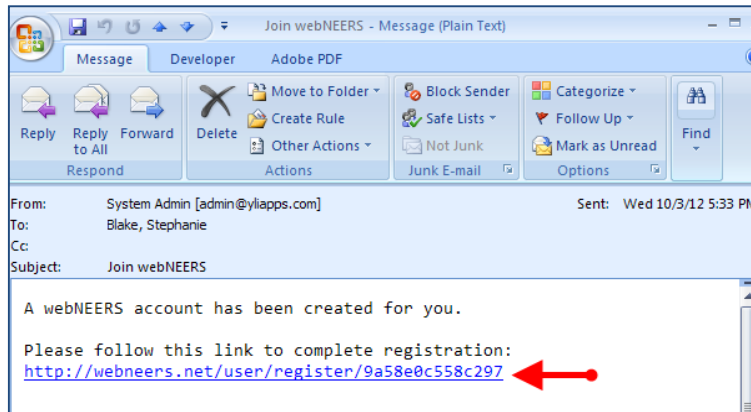
This will forward you to a screen that looks like the image below:

Note: The version number may be different when you register for the system

Note: *The screen will contain the user's email, not the email presented above.*

2. Enter the **Verification code** which was forwarded in a separate email or by some other means of communication, when the user was added to the system. If you do not have a verification code, contact the person who setup your account.
3. *Create* a **Password**, which you will need to remember.
4. Reenter the password to *Confirm* your password.
5. Click **Register** to complete the registration process.

Note: *Each user will log in with their own username and password. The passwords are encrypted and not available to anyone, at any level, including the system administrator(s). Login information is not to be shared between staff.*

Log In Once Registered

The log in screen, once the user has successfully registered, will look similar to the image below. At that point the user simply needs to enter his/her user name (email address) and password and click "Login" to access WebNEERS. If the password is forgotten, the user can use the steps above to reset it.

Note: *Version numbers change each time the software is updated*

Note: *Selecting the link in the registration email, after successfully registering will result in the screen below.*

Recommendations for Accessing WebNEERS

Creating Bookmark(s)

Once the user has registered in the system, the web site should be bookmarked. Creating a bookmark should be done according to the process defined by the web browser being used. Creating a bookmark will enable staff to easily access *WebNEERS* for future use.

The https address for **EFNEP** is:
https://www.webneers.net

The https address for **SNAP-Ed** is:
https://snap.webneers.net

Section 3: Setup: Customizing WebNEERS to Meet Local Needs

Customizing the System to Meet Local Needs

WebNEERS provides a high degree of flexibility. <u>Institute</u> and <u>Region level</u> users have the ability to customize the system to meet individual program and reporting needs, as well as increase the use of the data in program management.

Detailed below are the instructions for taking advantage of the Setup sections of the Adults and Youth Groups. These functions include establishing defaults for entry of new adults and youth groups, and streamlining data entry processes for frequent entries (cities, subgroups, lesson type, etc.). These options are available for <u>Region level</u> users. This section also discusses customizing subgroups and filters. This option can be set up at the <u>Region</u> and <u>Institute levels</u> to better segment and report on programming at the local level.

Defaults for Adults

Default profiles are meant to save time entering data that may be identical on individual records. Once a default profile is created, it is available to any user within a particular region. The defaults can be customized to include all or some of the information in the profile, depending on the <u>Region level</u> needs.

Example:
*A large number of EFNEP participants are educated from Athens, Georgia. A default can be established which automatically populates a profile for the **City** - Athens and the **State** - Georgia but does not populate the **Zip** code due to the many different zip codes used in the city.   In this profile, the user could choose to enter **Residence Type** since Athens is a central city of over 50,000. Finally, EFNEP might be identified as the Subgroup for this profile. The name of the Default might be Athens EFNEP*

Defaults for New Adults – Region Level Only

Creating Defaults for New Adults

1. Select **Defaults for New Adults** from the *WebNEERS Home page*, under the Adults section. This will display all of the defaults currently available for the Region level that the user is assigned.

   Note: *If there are multiple users in a Region, all defaults created within the Region will be available here.*

   << Back | Home >> Defaults for New Adult

2. Select **Add Default**

   + Add Default

   SEARCH:
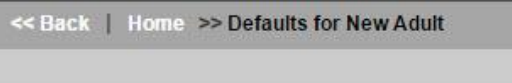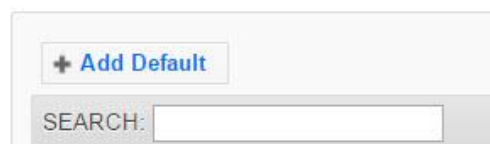
3. Name the **Adult Default**- *This is the only required field for a default.*

4. Select the fields to be automatically populated for the new **Adults**
   a. **Staff** – to whom the default applies if limited to a particular staff member
   b. **City** – if the city in which the participant is educated or lives is likely to be known
   c. **Zip** – if the zip code is a likely to be known
   d. **Residence Type** – if the residence type (e.g., Farm, Town under 10,000, etc.) is a likely to be known
   e. **Lesson Type** – if lesson type (e.g., group, individual, etc.) is a likely to be known
   f. <u>Federal</u>, <u>Institute</u> and <u>Region level</u> subgroups likely to apply to the adult

Note: *If the values need to be changed in any given record, the user can edit the field when adding the adult to* **WebNEERS**.

5. Select **Save** at the bottom of the screen to establish the default or **Cancel** to exit the screen without saving.

<< Back | Home >> Defaults for New Adult >> Create Defaults for New Adult

Name of Adult Default

Staff
--Select One--

City

State
GA

Zip

Residence Type
--Select One--

Lesson Type
--Select One--

Cancel   Save

Viewing

1. Select **Defaults for New Adults** from the *WebNEERS Home page*, under the **Adults** section.

> **Note:** *This will display all of the defaults currently available for the Region to which the user is assigned.*

> **Note:** *If there are multiple users in a Region, all defaults created within the Region will be available here.*

<< Back | Home >> Defaults for New Adult

University of Georgia Fulton ▾ 2013 ▾

+ Add Default

SEARCH: [   ]   SHOW All ▾ ENTRIES

Manage	Name	Staff	City	Zip
🔧 ❌	Sheltering Grace Ministries Transition Shelter	Jones, Tiffany	Marietta	30060
🔧 ❌	Right Side Up Treatment Center	Shumate, Olga	Roswell	30075
🔧 ❌	Perry Homes Branch Library	Jones, Leila	ATLANTA	30318
🔧 ❌	Nicolas House Transition Shelter	Jones, Leila	Atlanta	30312
🔧 ❌	Mothers Making a Change Treatment Center	Jones, Tiffany	Marietta	30060

Editing Defaults for New Adults

1. Select **Defaults for New Adults** from the *WebNEERS Home page*, under the **Adults** section

2. Select **Wrench icon (🔧)**, under the **Manage** column, located to the left of the default to be edited.

3. Make appropriate changes to the default fields.
4. Select **Save** to save modifications to the default and return to the list or select **Cancel** to return to the list of defaults and return the default to its previous state.

Deleting

1. Select **Defaults for New Adults** from the *WebNEERS Home page*, under the **Adults** section

2. Select **Delete icon (❌)**, under the **Manage** column, located to the left of the default to be deleted.

3. Select **Ok**, when prompted with "***Are you sure you want to delete?***" or select **Cancel** to maintain the default in **WebNEERS**

Defaults for New Youth Groups – Region Level Only

Creating Defaults for New Youth Groups

1. Select **Defaults for New Youth Groups** from the **WebNEERS Home page**, under the **Youth Groups** section

> **Note:** *If there are multiple users in a Region, all defaults created within the Region will be available here.*

2. Select **Add Default**

Manage	Name	City	Zip
No data available in table			

3. Name the **Youth Default**- *This is the only required field for a default.*

Name of Youth Default

Address 1

Address 2

City

State
DC

Zip

Delivery Mode
--Select Delivery

Staff Member
--Staff By Name--

Subgroups
☐ I: Institution Level Subgroup
☐ R: Region Level Subgroup

4. Select the fields to be automatically populated for the new **Youth Groups**
   a. **Address** – at which the education will occur or the address of the contact person
   b. **City** – City of which the education will occur
   c. **Zip** – if the zip code is likely to be known

d. **Delivery Mode –** if the delivery mode (e.g., club, camp, etc.) is likely to be known

e. **Staff Member –** if the staff member is likely to be known

f. Select <u>Institute</u> and <u>Region</u> **subgroups** likely to apply to the youth group

Note: *If the values need to be changed in any given record, the user can edit the field when adding the youth group to **WebNEERS**.*

5. Select **Save** at the bottom of the screen.

Viewing

1. Select **Defaults for Youth Groups** from the *WebNEERS Home page*, under the **Youth Groups** section

Note: *This will display all of the defaults currently available for the Region to which the user is assigned.*

Note: *If there are multiple users in a Region, all defaults created within the Region will be available here.*

<< Back | Home >> Defaults for Youth Groups

University of Georgia DeKalb/Bibb ▾ 2015 ▾

+ Add Default

SEARCH: [   ]   SHOW All ▾ ENTRIES

Manage	Name	City	Zip
🔧 ❌	Upward bound	Macon	31206

Editing Defaults for New Youth Groups

1. Select **Defaults for Youth Groups** from the *WebNEERS Home page*, under the **Youth Groups** section

2. Select **Wrench icon (🔧)**, under the **Manage** column, located to the left of the default to be edited.

3. Make appropriate changes to the default fields.

4. Select **Save** to modifications to the default and return to the list or select **Cancel** to return to the list of defaults and return the default to its previous state.

Deleting

1. Select **Defaults for Youth Groups** from the *WebNEERS Home page*, under the **Youth Groups** section

2. Select **Delete icon (** **)**, under the **Manage** column, located to the left of the default to be deleted.

3. Select **Ok**, when prompted with "*Are you sure you want to delete?*" or select **Cancel** to maintain the default in *WebNEERS*

Subgroups, Filters, and Public Assistance

The use of subgroups, filters, and public assistance also enables *WebNEERS* to be customized to meet the needs of the local level.

Subgroups

The term Subgroup is used to denote a category of adult participants or youth groups in the database. Each adult must be assigned to at least one Federal (F) subgroup – in the EFNEP version of WebNEERS, they must be assigned to EFNEP, in the SNAP-Ed version of WebNEERS, they must be assigned to SNAP-Ed. This allows the data to be captured and reported based on program. There are no Federal subgroups for youth groups at this time.

Subgroups can be created at the Institute and Region levels to categorize data in other ways. For example, a user may want to filter out information about a group of adult participants who have received EFNEP lessons together at one site. If so, he/she can create a new subgroup for the site. After this is done the subgroup can be selected within the adult record. It can also be included as part of a default for new adults to ease data entry.

Another way users can utilize subgroups is by creating filters. Filters can include just the subgroup or the subgroup along with other data points. After the filter is created, it is available for use on any of the report screens for adults or youth (depending on the filter type created) to see only that specific subset of data. Institute and Region levels may create their own subgroups if desired. Institute (I) and Region (R) subgroups do not transmit to the Federal level.

*Adding a subgroup is the same process for Adult participants and Youth Groups. However, for subgroups to apply to both Adult participants and Youth Groups, the subgroup will need to be created under both the **Adults** and **Youth Groups Setup** sections.*

Region Level

1. Select **Subgroups** on the WebNEERS Home page under the **Adults** or **Youth Groups Setup** section to display all of the Federal, Institute, and Region subgroups currently available to the user.

> **Note:** *If there are multiple users in a Region, all subgroups created, regardless of who created the subgroup in the Region, will be available and listed on this screen.*

Institute Level

1. At the Institute level, select **Subgroups** on the WebNEERS Home page under the **Setup** section to display all of the Federal & Institute subgroups currently available to the user.

> **Note:** *If there are multiple users in an Institute, all subgroups created, regardless of who created the subgroup, will be available and listed on this screen.*

> **Note:** *Institute level users cannot see Region level subgroups; those are only visible at the Region level.*

Creating Subgroups

1. Select **Add Subgroup** on the left of the screen above the table of subgroups.

2. Enter a **Name** for the Subgroup (this is the only required field for a subgroup)

3. Enter a **Description** for the subgroup

4. Select **Automatically Create Filter** if you wish to create a corresponding filter for this Subgroup.

Institute User – Assigning Subgroups to Regions

5. If you are an Institute level user, **check the regions** you want the Subgroup to be available to.

6. Select **Save** to save the subgroup and return to the list of subgroups or **Cancel** to return to the list of subgroups.

Viewing Subgroups

This will display all of the subgroups currently available. Institute level subgroups and Federal level subgroups will show up here automatically if applied by the Federal or created by an Institute level user. If there are multiple users in a region, all subgroups created by Region level users, will be available here; Institute level users cannot see Region level subgroups.

To view only Region Level Subgroups

Type the word "Region" into the live search option at the top left of the table. This will filter the results. You can also do this for Institute and Federal level subgroups.

To view only Institute Level Subgroups

Type the word "I**nstitute**" into the live search option at the top left of the table. This will filter the results. You can also do this for Federal level subgroups.

Subgroup List Report

Select **Subgroup List** on the **WebNEERS Home page** under the **Adults** or **Youth Groups Reports** section(s) for Region level users or under the **Setup** section for Institute level users. Users can also select PDF at the top of this screen to get a printable version of this list of subgroups.

Editing Subgroups

1. Select the **Wrench icon (   )**, under the **Manage** column, located to the left of the subgroup to be edited
2. Adjust the **Name** and/or **Description**, as appropriate

> **Note:** *Federal level subgroups cannot be edited. Institute level subgroups can only be edited by Institute level users; Region level subgroups can only be edited by Region level users.*

Institute User – Assigning Subgroups to Regions

3. Check or uncheck any regions that need to be added or removed.

4. Select **Save** at the bottom of the screen or select **Cancel** to leave the Subgroup unchanged.

Deleting Subgroups

1. Select the **Delete icon (** **)**, under the **Manage** column, located to the left of the subgroup to be deleted

2. Select **Ok**, when prompted with "***Are you sure you want to delete?***" or select **Cancel** to maintain the subgroup in WebNEERS

Note: *Federal level subgroups cannot be deleted. Institute level subgroups can only be deleted by Institute level users; Region level subgroups can only be deleted by Region level users.*

Filters

Filters allow the user to select (filter) adult participants or youth groups based on specific criteria. Almost all adult-based reports, including the Adult Summary, the Diet Summary, and the Behavior Checklist Summary can be prepared using the Adult Filters. This is also the case for youth-based reports.

Each level of WebNEERS, Federal (F), Institute (I), and Region (R) may create its own filters. The filter allows the user to create subsets of the data using logical expressions. This is useful for viewing summary reports. When the filter is used, only adults or youth groups who meet the filter criteria are included in the report. The default filter, **all adults or all youth groups**, may be used to include all participants. Filters are designated Federal (F), Institute (I), or Region (R), depending on who prepared the filter. Region users cannot revise or delete <u>Institute level</u> or <u>Federal level</u> filters.

Note: *Adding a filter is the same process for Adult participants and Youth Groups. However, filters options are different for Adults and Youth Groups and need to be created individually under the **Adults** and **Youth Groups Setup** sections.*

Region Level

1. Select **Filters** on the WebNEERS Home page under the **Adults** or **Youth Groups Setup** section to display all of the Federal, Institute, and Region filters currently available to the user.

Note: *If there are multiple users in a Region, all filters created, regardless of who created the filter in the Region, will be available and listed on this screen.*

Institute Level

1. Select **Adult Filters** or **Youth Filters** under the **Setup** section to display all of the Federal & Institute filters currently available to the user.
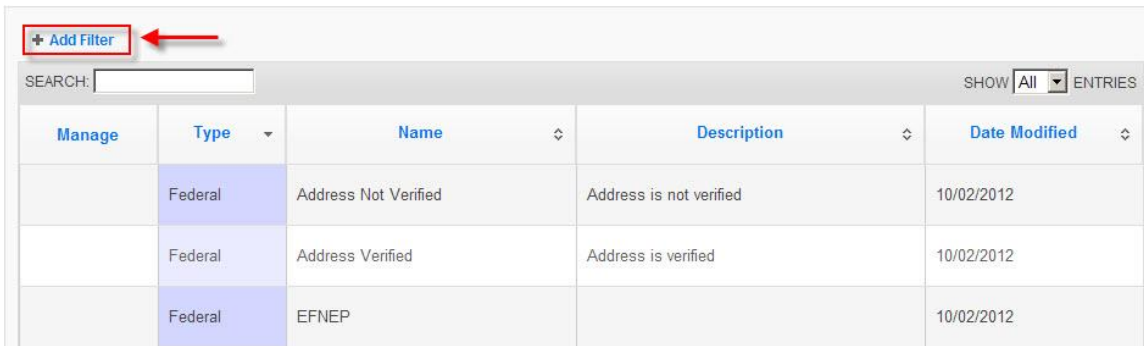
Note: *If there are multiple users in an Institute, all filters created, regardless of who created the filter, will be available and listed on this screen.*

Note: *<u>Institute level</u> users cannot see <u>Region level</u> filters; those are only visible at the <u>Region level</u>.*

Creating Filters
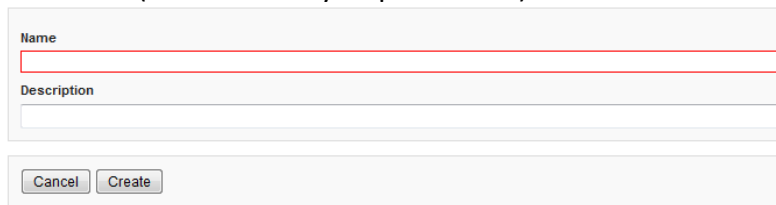
2. Select **Add Filter** on the left of the screen above the table of filters.

3. **Name** (this is the only required field) and **Describe** the filter
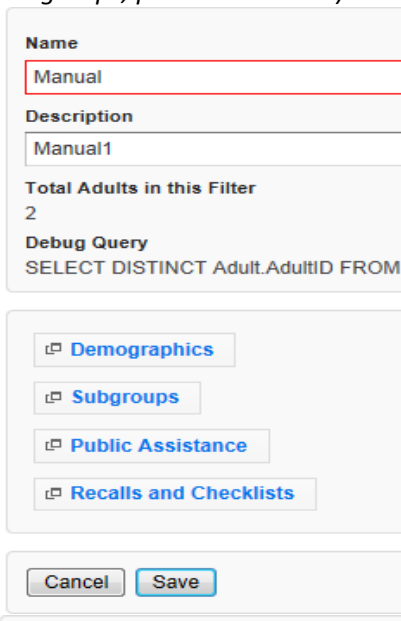
4. Select **Create**
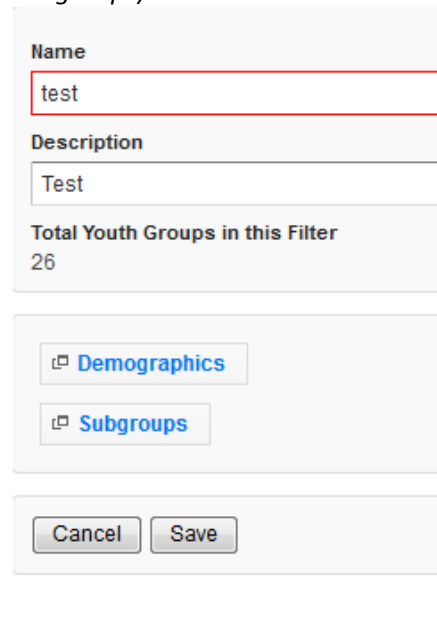
Note: *The number of adults or youth groups captured by the filter is listed below the Description field. Before characteristics are selected, the number equals to the total number of adults or youth groups in the Region or Institute level. The number will update as you apply characteristics to the filter.*

Setup Adults: *Example screenshot on which filters can be generated (demographics, subgroups, public assistance)*

Setup Youth Groups: *Example screenshot on which filters can be generated (demographics, subgroups)*

5. Identify the characteristics of the participants to be filtered.
   a. **Demographic Option** (Adult and Youth Filters)
      1. Click the **Demographics** button
      2. Select or enter information on this screen to build a filter based on specific information such as age, entry and exit dates, # of lessons, income level, and/or poverty level (e.g., a filter for a race subcode can be used to generate summary reports for a population of interest). This is the only step needed if a unique filter for specific demographic information is of interest.

   b. **Subgroups Option** (Adult and Youth Filters)
      1. Click the **Demographics** button
      2. Select one or more subgroups from each column as needed.

In at least one	In all	Not in all	Not in at least one
X or Y	X and Y	Not (X or Y) = Not X and Not Y	Not (X and Y) = Not X or Not Y

To filter data for one (1) subgroup, highlight that group in the **In at least one** column and select **Save**.

Note: *Remember that Filters can be created when Subgroups are created. See Creating Subgroups.*

To filter data for multiple subgroups or to filter data for one or more exception follow these guidelines:

- **In at least one** column - Participant must be in at least one of the selected subgroups: in either X or Y (OR)
- **In all** column - Participant must be in ALL of the selected subgroups: in both X and Y (AND)
- **Not in all** column - Participant is NOT in ALL of the selected subgroups: in neither X nor Y (NOR)
- **Not in at least one** column - Participant is NOT in at least one of the selected subgroups: Either Not in X or Not in Y (NAND)

Note: *A subgroup selected in one column cannot be selected in another, but multiple subgroups can be selected in the same column.*

c. **Public Assistance Option** (Adult Filters)

1. Click the **Public Assistance** button
2. Select one or more public assistance from each column as needed. In most cases, this will be the only step needed for creating a group filter.

In at least one	In all	Not in all	Not in at least one
X or Y	X and Y	Not (X or Y) = Not X and Not Y	Not (X and Y) = Not X or Not Y

To filter data for one (1) public assistance, highlight that group in **In at least one column** and select **Save**.

To filter data for multiple subgroups or multiple exceptions follow these guidelines:

- **In at least one** column - Participant must be in at least one of the selected public assistance: in either X or Y (OR)
- **In all** column - Participant must be in ALL of the selected public assistance: in both **X and Y** (AND)
- **Not in all** column - Participant is NOT in ALL of the selected public assistance: in **neither** X nor Y (NOR)
- **Not in at least one** column - Participant is NOT in at least one of the selected subgroups: Either Not in X or Not in Y (NAND)

Note: *Public Assistance is not collected for Youth Groups and therefore cannot be filtered.*
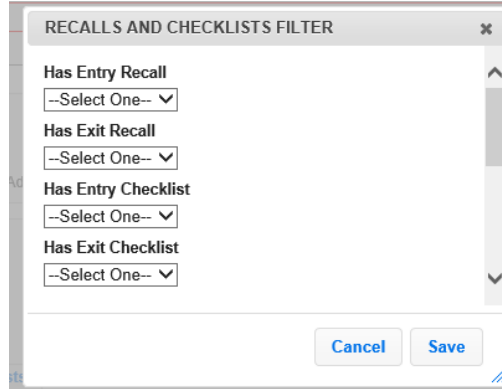
Note: *A public assistance selected in one column cannot be selected in another, but multiple public assistance choices can be selected in the same column.*

d. **Recalls and Checklists Option** (Adult Filters)

1. Click the **Recalls and Checklists** button
2. Select Yes/No for recall and checklist options, as needed.

This filter option is not available for Youth Groups.

Institute User - Assigning Filters to Regions

5. If you are an Institute level user, **check the regions** where you want to release the Filter.

6. Select **Save**, when all characteristics/subgroups/public assistance (for adults)/recall and checklist (for adults) items have been selected.

Viewing Filters

This will display all of the filters currently available. Institute level filters and Federal level filters will show up here automatically if applied by the Federal or Institute level user. If there are multiple users in a region, all filters created by all Region level users, will be available here; Institute level users cannot see Region level filters.

To view only Region Level Filters
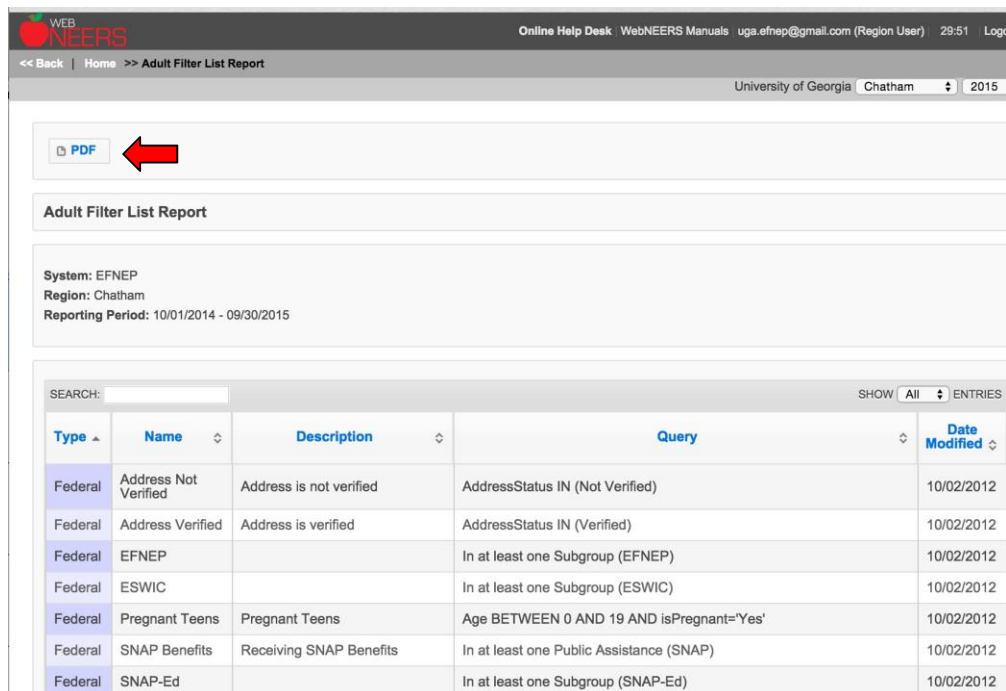
Type the word "Region" into the live search option at the top left of the table. This will filter the results. You can also do this for Institute and Federal level filters.

To view only Institute Level Subgroups

Type the word "I**nstitute**" into the live search option at the top left of the table. This will filter the results. You can also do this for <u>Federal level</u> subgroups.

Filter List Report

Select **Filter List** on the ***WebNEERS Home page*** under the ***Adults*** or ***Youth Groups Reports*** section(s) for <u>Region level</u> users or under the ***Setup*** section for <u>Institute level</u> users. Users can also select PDF at the top of this screen to get a printable version of this list of filters.

Editing Filters

1. Select the **Wrench icon (   )**, under the **Manage** column, located to the left of the filter to be edited
2. Adjust the **Name** and/or **Description**, as needed
   a. If further adjustments are needed on a filter see the above section on <u>creating filters.</u>

Institute User – Assigning Filters to Regions

3. Check or uncheck any regions that need to be added or removed.

4. Select **Save** at the bottom of the screen or select **Cancel** to leave the Filter unchanged.

> *Federal level filters cannot be edited. Institute level filters can only be edited by Institute level users; Region level filters can only be edited by Region level users.*

Deleting Filters

1. Select the **Delete icon ( )**, under the **Manage** column, located to the left of the Filter to be deleted
2. Select **Ok**, when prompted with "***Are you sure you want to delete?***" or select **Cancel** to maintain the Filter in ***WebNEERS***

> *Federal level filters cannot be deleted. Institute level filters can only be deleted by Institute level users; Region level filters can only be deleted by Region level users.*

Public Assistance

Public assistance programs denote types of public or other food assistance that participants receive either prior to or as a result of participating in nutrition education programs. Institute and Region levels may create their own public assistance codes if desired. *Institute (I) and Region (R) public assistance programs do not transmit to the Federal level.*

Region Level

Select **Public Assistance** on the WebNEERS Home page under the **Adults** or **Youth Groups Setup** section(s)

Institute Level

Select **Public Assistance** under the **Setup** section.

Creating Public Assistance:

1. This will display all of the Federal, Institute, and Region public assistance currently available to the user. If there are multiple users in a Region, all public assistance created, regardless of who created the public assistance in the Region, will be available and listed on this screen.

2. Select **Add Public assistance** on the left of the screen above the table of public assistance.

3. Enter **Name** (this is the only required field for a public assistance) and *Describe* the public assistance

4. If the program is a Food Assistance program, check **Food Assistance.** Make sure it is marked **active** if it will be used to collect data.

Institute User – Assigning Public Assistance to Regions

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5. If you are an <u>Institute level</u> user, **check the regions** you want the Public Assistance to be available to

6. Select **Save** to save the public assistance and return to the list of public assistance or **Cancel** to return to the list of public assistance.

Viewing Public Assistance

This will display all of the public assistance currently available. <u>Institute level</u> public assistance and <u>Federal level</u> public assistance will show up here automatically if applied by the <u>Federal</u> or <u>Institute level</u> users. If there are multiple users in a region, all public assistance created by <u>Region level</u> users, will be available here; <u>Institute level</u> users cannot see Region level public assistance programs.

To view only Region Level Public Assistance

Type the word "Region" into the live search option at the top left of the table. This will filter the results. You can also do this for Institute and Federal level public assistance programs.

To view only Institute Level Public Assistance

Type the word "Institute" into the live search option at the top left of the table. This will filter the results. You can also do this for Federal level public assistance programs.

Adult Public Assistance List

Select **Public Assistance List** on the *WebNEERS Home page* under the *Adult* section or under the **Setup** section for Institute level users. Users can also select PDF at the top of this screen to get a printable version of this list of filters.

Editing Public Assistance

1. Select the **Wrench icon ( )**, under the **Manage** column, located to the left of the public assistance to be edited
2. Adjust the **Name, Description**, **Food Assistance** checkbox, or **Active** checkbox, as appropriate

> **Note:** *Federal level public assistance cannot be edited. Institute level public assistance can only be edited by Institute level users; Region level public assistance can only be edited by Region level users.*

Institute User – Assigning Public Assistance to Regions

3. Check or uncheck any regions that need to be added or removed.

4. Select **Save** at the bottom of the screen or select **Cancel** to leave the public assistance unchanged.

Deleting Public Assistance

1. Select the **Delete icon ( )**, under the **Manage** column, located to the left of the public assistance to be deleted
2. Select **Ok**, when prompted with "***Are you sure you want to delete?***" or select **Cancel** to maintain the public assistance in *WebNEERS*

> **Note:** *Federal level public assistance cannot be deleted. Institute level public assistance can only be deleted by Institute level users; Region level public assistance can only be deleted by Region level users.*

Manage Reporting Dates (optional feature)

In WebNEERS, the Federal fiscal year (Oct 1 – Sept 30) is the system default for all reports. If your institution prepares monthly, quarterly or other date-driven reports, the Manage Reporting Dates feature can be used to override the default dates. This feature is controlled at the Institution Level and gives all users the ability to run all Region and all Institution Level reports without manually entering dates or applying a date filter.

> **Tip:** *It is important to notify users when you change the default reporting dates. If they are unaware their reports are being filtered by the dates, it may appear as though data is missing even though it is not.*

*If the system dates have been defined, users can still delete or manually change the **Begin** and **End dates** on their report screens OR apply a date filter to override default.*

Define Reporting Dates

- Log in as an Institution Level user
- Select "**Manage Reporting Dates**" from the *WebNEERS Home Page*
- Enter the **Start date** (the date from which you want data to be included in your reports)
    - Type manually - MM/DD/YYYY format or
    - Select the Calendar Icon " 🗓 " and choose the correct date
- Enter the **End date** (the date until which you want data to be included in your reports)
    - Type manually - MM/DD/YYYY format or
    - Select the Calendar Icon " 🗓 " and choose the correct date
- Click "**Add**" to apply the new default Reporting Dates to all reports
- Repeat these steps each time you wish to change the dates

Once Reporting Dates are added, they are immediately applied to all reports at the Institution and the Regional Levels and all reports are filtered by the dates.

Remove Reporting Dates

- Log in as an Institution Level user
- Select "**Manage Reporting Dates**" from the *WebNEERS Home Page*
- Delete the **Start date** and the **End date**
- Click "**Add**" to remove the default Reporting Dates from all reports and to return to the system default (Oct 1 – Sept 30)

Once the Reporting Dates are removed, all Institution and all Regional Level reports immediately return to the system default.

Section 4 – Managing Staff; Adding, Editing, and Reporting

Managing Staff; Adding, Editing, and Reporting

The Staff Section is used to add, edit and view Staff related information. Managing staff is only possible as a <u>Region level</u> user.

For EFNEP, the National Office only requires staff information for those who do direct education. If a data entry person or a supervisor needs access to WebNEERS, they just need a user account. They do not need to be entered into the staff section of WebNEERS. That said, if universities wish to collect data on other staff for other reporting purposes they can. <u>Region Level</u> users should seek guidance on this from their Institution.

Note: *When you add someone as a WebNEERS <u>Region level</u> user, it does not automatically add him/her as a staff person. If a "user" is also a staff person, follow the steps below to add him/her to the system.*
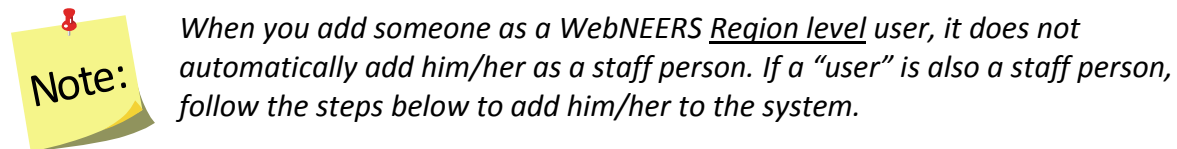
Managing Staff

There are three classifications of staff members in **WebNEERS**: **Professional**, **Paraprofessional** and **Volunteer**. All staff that provides nutrition education to adults or youth should be entered.

Classifications of Staff:

Examples of <u>Professional staff</u> are:
- Nutrition supervisors
- Supervising Community Educators

Examples of <u>Paraprofessional staff</u> are:
- Community Educators delivering content to participants

Examples of <u>Volunteer staff</u> are:
- Persons from the community who assist in programming, who are not paid for their efforts.

Note: *Entry of adult records requires designation of the assigned staff member and entry of youth groups requires identification of the group's leader(s). Thus, entry of the staff members should be one of the first tasks completed with a new database.*
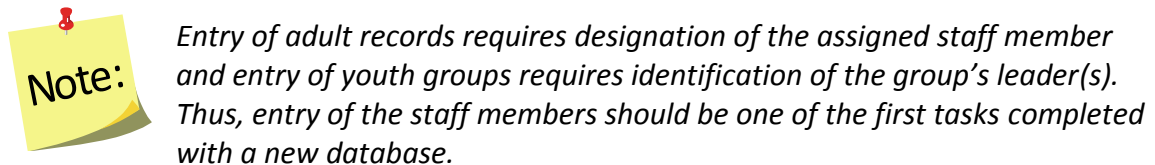
Staff IDs

Staff IDs can be set in one of two ways:

Automatic ID Creation

- WebNEERS will automatically assign a unique number as the identifier for a staff member, unless a Custom ID number is created

Note: *IDs are shared across all regions so numbers may appear to be missing as new staff are added to the system.*

Custom ID Creation

- Any custom identifier may be assigned to a staff person. The only requirements are that the ID must be unique for that Institute (i.e., no staff in any region can have the same ID) and the ID may not contain any special characters.

Editing a Custom ID

- A **Custom ID** can be added or changed on the Demographics tab on any staff member at any time.
- The system will confirm that the **Custom ID** is unique (i.e., hasn't been used). If it is unique, the record can be saved and the **Custom ID** will be updated.
- If it has been used, a different value will have to be entered before the record can be saved and the **Custom ID** updated.

Note: *Custom IDs are optional and updating the Custom ID should not be something data entry staff do every time they open a record. For this reason, the tab/enter key will skip over the field. Users will have to manually put their cursor in the Custom ID field to make an edit.*

Adding New Staff

1. Log into the appropriate *WebNEERS* system (EFNEP or SNAP-Ed)
2. Select **Manage Staff** from the *WebNEERS Home page*
3. Select **Add Staff**
4. Select **Staff Type**.

Staff Type
--Select One--

Custom ID

Staff Type
--Select One--
--Select One--
A | Professional
P | Paraprofessional
V | Volunteer

Cancel   Next

Note: *You cannot change the "staff type" after the staff is added and saved so please be sure you select the correct option before proceeding.*

Note: *When adding a volunteer the user will be required to select the staff supervisor for the volunteer. Make sure you enter that individual first.*

5. Type in the **Custom ID**, if appropriate
6. Select **Next**
7. Fill in the necessary demographic characteristics on the **DEMOGRAPHICS** tab

Professional and Paraprofessional screenshot

PCM: Martinez, Carmen - Paraprofessional

| DEMOGRAPHICS | HOURS |

First Name

* This field is required   * This field is required

Last Name

Address

City
Savannah

State
GA

Zip

Phone

Ext

Email

Gender
Female

Custom ID (?)
CM

Ethnicity
Hispanic or Latino

Race
- ☐ American Indian or Alaskan Native
- ☐ Asian
- ☐ Black or African American
- ☐ Native Hawaiian or Other Pacific Islander
- ☑ White
- ☐ Not Provided

Cancel Save

Volunteer screenshot

| DEMOGRAPHICS | HOURS |

First Name

* This field is required   * This field is required

Last Name

Staff
Orellana, Fani I PFO

Address
211 South Tillman St.

City
Glennville

State
GA

Zip
30427

Phone
(912) 654-5227

Ext

Email

Gender
Female

Custom ID (?)

Ethnicity
Not Hispanic / Latino

Race
- ☐ American Indian or Alaskan Native
- ☐ Asian
- ☐ Black or African American
- ☐ Native Hawaiian or Other Pacific Islander
- ☑ White
- ☐ Not Provided

Age Code
Adult (18 or older)

Is Current/Former EFNEP Participant (?)
No

Role
- ☐ Instructional (?)
- ☐ Advisory Committee (?)
- ☑ Educational Support (?)
- ☐ Support Service (?)
- ☐ Middle Manager (?)

Cancel Save

Note: *The Volunteer **DEMOGRAPHICS** tab requires the staff person with whom the volunteer is working (below the volunteer's name), the age code (whether the volunteer is an adult or a youth), whether or not he/she is a former EFNEP participant, and role the volunteer is filling.*

Volunteer Roles

- *Instructional* – Teaches food and nutrition and related subject matter to EFNEP adults or youth; gives demonstrations; helps program families make most use of food stamps or other resources; assists experienced volunteer, paraprofessional, or professional with food demonstration or in-service training for volunteers or paraprofessionals; helps homemakers with language barriers; visits graduated participants to encourage them to continue learning about food and nutrition, and to become involved in other Extension programs.
- *Advisory Committee* – Serves on EFNEP Advisory committee, Family and Consumer Sciences or 4-H Committee.
- *Educational Services* – Provides clerical help (including preparation of teaching materials, visuals, etc.); recruits, organizes; provides publicity and public relations.
- *Support Services* Provides baby-sitting, transportation, meeting place, refreshments, equipment, clothing, housekeeping arrangements, emergency food, or financial help.
- *Middle Manager* – Unpaid service to or leadership of other volunteers by a youth or adult.

Option 1 - Not Entering Hours When Adding Staff

8. Select **Save** at the bottom of the page. If required fields are not complete, the form will not save and the cursor will be put on the first required field that is either empty or contains incorrect data.
9. Select **Confirm** when prompted "***You have not entered any hours for this staff member. Are you sure you want to save?***"

Option 2- Entering Hours When Adding Staff

8. Select the **HOURS** tab
9. Enter the hours for the staff member in the appropriate fields

10. Select **Save** at the bottom of the page
11. If prompted, select **Confirm** when prompted "***You have not entered any hours for this staff member. Are you sure you want to save?***"

Note: *Staff that have hours totaling above 2080 will trigger an alert in WebNEERS, informing the user that the total hours exceeds one FTE (full time equivalent). The hours can then be saved or modified by clicking either **Save** or **Cancel** at the bottom of the window*

Viewing or Editing Information for Existing Staff

1. Log into the appropriate *WebNEERS* system (EFNEP or SNAP-Ed)
2. Select **Manage Staff** from the *WebNEERS Home page*
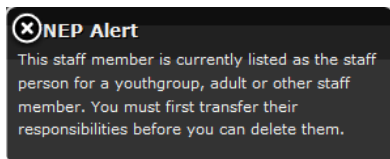3. Select the ***Wrench icon*** (   ) , under the options column, beside the staff member to be viewed/edited
4. View and/or edit the information on the selected staff person

Note: *All required information is outlined in red*

5. Select **Save** at the bottom of the page.

Note: *If required fields are incomplete, the form will not save and the cursor will be put on the first required field that is either empty or contains incorrect data.*

Updating Staff Hours in WebNEERS

Capturing and recording staff hours is essential. Reporting the staff hours, by appropriate type of activity (adult or youth work) enables nutrition supervisors, state and federal level staff to accurately assess and report staffing commitment and output achieved through the staffing commitment.

1. Log into the appropriate *WebNEERS* system (EFNEP or SNAP-Ed)
2. Select **Manage Hours** from the *WebNEERS Home page*
3. Select the *Wrench icon* (   ) , under the manage column, beside the staff member whose hours need to be viewed/edited
4. **Enter** the staff hours
5. Select **Save** at the bottom of the page to save and close the record. Select **Save and Next** to edit the hours for the next staff person in the system.

Note: *Staff that have hours totaling above 2080 will trigger an alert in WebNEERS, informing the user that the total hours exceeds one FTE (full time equivalent). The hours can then be saved or modified by clicking either **Save** or **Cancel** at the bottom of the window*

Deleting Staff

As staff leave employment or volunteers stop providing services, it is necessary to remove those individuals from *WebNEERS*.

Note: *If staff or volunteers are also WebNEERS **users**, deleting them from the Manage Staff screen does not remove their ability to log into the system. They will also need to have their accounts deactivated. See Section 2.*

Note: *It should be noted that staff who have volunteers and/or participants (adult or youth) to whom they are assigned may not be deleted until those volunteers and/or participants have been transferred to another staff person or a new reporting period has been started, with all past volunteers and/or participants no longer active in WebNEERS*

1. Log into the appropriate *WebNEERS* (EFNEP or SNAP-Ed)
2. Select **Manage Staff** from the *WebNEERS Home page*
3. Select the *Delete icon (   )*

Note: *Before selecting the delete icon, please make sure the item selected/the information highlighted should be deleted. Once an item has been removed there is no way to restore it; you cannot "undo" a deletion.*

4. Select **Ok** on the pop-up screen that indicates "***Are you sure you want to delete <name of person>?***"

If an "EFNEP Alert" pop-up message appears in the upper right-hand corner of the screen, the staff or volunteer has volunteers, adults, or youth groups currently assigned to him/her transferred to another staff member prior to the staff or volunteer being deleted. See [***Transfer Responsibilities***](#) *below.*

> ⊗NEP Alert
> This staff member is currently listed as the staff person for a youthgroup, adult or other staff member. You must first transfer their responsibilities before you can delete them.

5. The staff or volunteer will no longer be listed.

Reports and Reporting

Staff Mailing Labels

Staff Mailing Labels are available at the Region level. They may be prepared for any combination of the three staff classifications. For example, the user may prepare labels for professionals or for professionals and paraprofessionals combined. Mailing labels are available in different formats. The print direction selected will optimize the label for easier application at the Region level.

1. Select **Staff Mailing Labels** from the ***WebNEERS Home page***
2. Select the appropriate **Staff Type** (the user may choose one or more)

If printing Volunteer Labels, select the appropriate Staff Filter

3. Select the **Label Type** the user would like to print (Avery 5160 and 5164 are listed)
4. Select the **Print Direction**
   a. Horizontal - Staff are placed on labels first left to right and next top to bottom.
   b. Vertical - By selecting this option, staff will print first top to bottom and then left to right. This is useful when the labels being used are perforated in columns and the user would like to take advantage of them while still maintaining the labels in the correct order.

Staff Types
☐ Professional
☐ Paraprofessional
☐ Volunteer
| All ▾ |

Label Types

	Avery #	Dimensions	Across
○	Avery 5160	1" x 2 5/8"	3
◉	Avery 5164	3 1/3" x 4"	2

Print Direction
| Horizontal ▾ |

Sort
| Zip Code ▾ |

[Print PDF] [Save as Spreadsheet]

5. Select the **Sort**
    a. **Zip Code** - sorts by the zip code of the staff member in ascending numeric order
    b. **Name** - sorts by the last name of the staff member in ascending alphabetic order
6. Select the output of the report
    a. For PDF: Select **Print PDF**

Note: *The *.pdf is useful if the user wishes to print the labels directly from the file. If selected a browser window will open and the file will automatically begin to download.*

    b. For Spreadsheet: Select **Save as Spreadsheet**

Note: *This option exports a *.csv file which can be opened with most standard database programs, for modification, or with most standard word processing software packages, for mail merges. If selected, a browser window will open and the user will be asked to choose a destination for the file to be saved.*

Email List (CSV)

Email Lists are available at the Region level. The email list *.csv option exports a file which can be opened with most standard database, word processing, and spreadsheet programs, for modification and/or inclusion in email programs. This can be used to contact or follow-up with staff. Email addresses should never be shared or distributed to outside sources without prior written consent.

1. Select **Email List (CSV)** from the *WebNEERS Home page*, under *Reports* in the staff section
2. Select the appropriate **Staff Type** (only one type may be selected at a time)
3. Select **Submit**
4. Indicate where to save the file, when prompted to do so in the pop-up browser window.

Status

The Staff Status report is available at the Region level. It provides information on the number of adults who entered or exited the program by their assigned staff member. The Staff Status report can help manage professionals, paraprofessionals, and volunteers who are working with Adults.

1. Select **Status** from the *WebNEERS Home page*, under *Reports* in the staff section
2. Select dates for the **Begin Date** and **End Date** for the report
   a. Type manually as MM/DD/YYYY or
   b. Select the Calendar Icon (📅) and choose the correct date

Note: *If no dates are selected, WebNEERS will pull all available data for the current reporting period. It is only necessary to enter dates if a specific subset of the data is needed.*

3. Select **Submit**
4. The report will be displayed on the screen.

Staff List

The Staff List report is available at the Region level. It is useful for quickly viewing both individual and total staff hours and FTEs of Professionals, Paraprofessionals, or both.

1. Select **Staff List** from the *WebNEERS Home page*, under *Reports* in the staff section
2. Select the **Staff Type** the user would like to view in the report
3. Select **Submit**
4. The report will be displayed on the screen

Volunteer List

The Volunteer List report is available at the Region level. It is useful for quickly viewing both individual and total hours and FTEs for Volunteers.

1. Select **Volunteer List** from the *WebNEERS Home page*, under *Reports* in the staff section
2. Choose an option under **Staff Selection**
   a. *Entire Unit* - This selection will aggregate all volunteers, regardless of their staff supervisor
   b. *For a Staff member* - This selection requires the user to select the professional or paraprofessional for whom the user would like to see a list of volunteers

3. Choose an option under **Volunteer Selection**

Note: *In order for volunteers to show up in this report under "Volunteers Who Work with Youth" or "Volunteers Who Work with Adults" a minimum of 1 hour, for the appropriate category, must be entered under staff hours.*

4. Select **Submit**
5. The report will be displayed on the screen
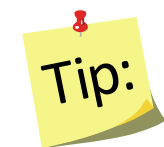
Tip: *If **a Staff Member** (step 2 above) is selected - after selecting **Submit**, the user will need to select the Magnifying Glass (Preview) icon (🔍) under the **Options** column to view the report.*

Profile Summary Report – Region Level

The Profile Summary Report provides the full time equivalents for each program and each staff type, as well as a gender, race, and ethnicity breakdown for all staff members of the selected type for the region.

1. Select **Profile Summary** from the *WebNEERS Home page*, under *Reports* in the staff section
2. Select the **Staff Type** the user would like to view in the report
3. Select **Submit**
4. The report will be displayed on the screen.

Staff Summary Report – Institute Level

The Staff Summary Report provides the full time equivalents for each program and each staff type, as well as a gender, race, and ethnicity breakdown for all staff members of the selected type for one or many regions.

1. Select **Staff Summary** from the *WebNEERS Home page*, under the *Reports* section
2. Select **Regions** to be included in the report
3. Select the **Staff Type** the user would like to view in the report
4. Select **Submit**
5. The report will be displayed on the screen.

Transfer Responsibilities

The transfer responsibilities section allows the user to transfer the staff assigned to adults, youth groups, or volunteers entered in *WebNEERS* from one staff member to another. This option is useful when a staff member needs to be removed from *WebNEERS* but still has multiple adults, youth groups, or volunteers to whom they are assigned.

Note: *Once completed, the transfer cannot be undone. It is important to double check all of the selections before selecting **Submit***

1. Select **Transfer Responsibilities** from the *WebNEERS Home page*, under *Setup* in the staff section
2. Select the **From Staff** to designate the **staff person** who will be relieved of adults, youth groups, volunteers or some combination of the three
3. Select the **To Staff** to designate the **staff person** who will receive the adults, youth groups, or volunteers
4. Select the data to transfer
    a. **Adult** participants
    b. **Youth groups**
    c. **Volunteers**

Note: *All active adults, all active youth groups, all volunteers, or some combination of the three can be transferred from one staff person or volunteer to another.*

Note: *Exited adults and youth will not transfer to a new staff person. In these case, the region or university should wait until the new reporting year to delete that staff person*

5. Select **Submit**
6. Verify selection
   a. Select **Ok**, when prompted "*Are You Sure You Want To Transfer These Responsibilities*" to approve the transfer of adults, youth, and/or volunteers
   b. Select **Cancel**, when prompted "*Are You Sure You Want To Transfer These Responsibilities*" to cancel the transfer of adults, youth, and/or volunteers
7. A confirmation message for adults, youth groups, and/or volunteers will appear if the transfer was successful.

Note: *Transferring responsibilities does not remove **WebNEERS** access if the person also has a user account. Staff who leave employment will need to have their user privileges, if any are awarded, removed and/or have their user account deactivated. This changing of privileges or removing of users will need to be completed in all applicable levels of **WebNEERS**.*

Browse Staff Data

Browse Staff Summary – Institute Level

The Browse Staff Summary screen provides a snapshot of the number of staff and the number full time equivalents for each staff type by region. This is a quick way to see in real time if data entry is complete.

1. Select **Browse Staff Summary** from the *WebNEERS Home page*, under the *Browse* section
2. The data will be displayed on the screen.

Section 5 – Managing Adults – Adding, Editing, and Reporting

Managing Adults – Adding, Editing, and Reporting

The Adult Section is used to add, edit, and view Adult related information. Managing Adults is only possible as a <u>Region level</u> user.

It is essential that all information gathered, from participants and paraprofessionals, is entered accurately. As this is the information that generates the reports for submission to the <u>Institute</u> and the <u>Federal levels</u>, the data entry person is key to an accurate, comprehensive, and quality report.

Managing Adults

Adding New Adult Participants:

1. Log into the appropriate **WebNEERS** system (EFNEP or SNAP-Ed)

    Remember EFNEP and SNAP-Ed data are entered on different sites.
    *The https address for **EFNEP** is:*
    https://www.webneers.net
    *The https address for **SNAP-Ed** is:*
    https://snap.webneers.net

2. Select **Manage Adults** from the **WebNEERS Home page**
3. Select **Add Adult**
4. Select the **Staff Member** from the list of available staff

    *Remember staff must be entered before adults or youth groups can be entered. If the staff member is not listed, select **Cancel** and return to the **WebNEERS Home page**; enter the desired staff member as a new staff member. See Section 4: Managing Staff for instructions on adding Staff.*

    Tip: Type the first letter of the staff person's last name in the Staff drop-down to quickly locate the record of interest.

5. Select the **Program Status** of the adult being entered.
6. Assign a **Custom ID** or leave it blank for an ID to be generated by **WebNEERS** at creation.

    IDs are shared across all regions so numbers may appear to be missing as new adults are added to the system.

*Tracking the number of different series planned/offered is a reporting requirement in the Education and Administrative Reporting System (EARS) required by the USDA –Food and Nutrition Services (FNS) for programs receiving SNAP-Ed funds. There is no data entry field for this in **WebNEERS**.*

7. Select an **Adult Default** from the list of available defaults or skip to step 8.
   a. Defaults automatically populate in the new adult.
   b. If **Default Profiles for New Adults** <u>were previously created</u>, that defines the Subgroups, there is no need to select subgroups again unless there are additional subgroups or changes are needed.
   c. If **Default Profiles for New Adults** <u>were not previously created</u>, choose the appropriate Subgroups.

Note: *Defaults need to be established before this step can be used. If defaults are not established, but you want to use them, see Section 3 – Setup: Customizing **WebNEERS** to Meet Local Needs for more information on this topic.*

Note: *If a staff member is selected from the Add Staff screen, it will automatically override the staff member selected in the adult default. If the default already indicates an assigned staff member, the user is advised not select a staff member (step 4 above) to avoid possible confusion or incorrect data.*

8. Select **Next**

Contact Info Tab

1. On the **CONTACT INFO** tab - complete the entry of the contact information, as collected on the *Adult Entry/Enrollment* form. See the screen shot below.
2. Enter the **Enrollment date** (first date of education)
   a. Type manually - MM/DD/YYYY format *or*
   b. Select the Calendar Icon (📅) and choose the correct date.
3. Enter participant name (**First** and **Last**)
4. Enter **Group Name**, if applicable.
5. Enter the **Address** for the participant.
6. Enter the **City** and **Zip**.
   a. If **Default Profiles for New Adults** <u>were previously created</u>, that defines the City and Zip, there is no need to enter that information again here.
   b. If **Default Profiles for New Adults** <u>were not previously created</u>, enter the City and Zip here.
7. Enter the **Phone Number** – including the area code, and the **Phone Extension**

8. Enter the **Email** address, if provided.

Note: *If a custom ID was entered during step 6 above, it will show on this tab. If a Custom ID is the same as a previously assigned System ID, then **WebNEERS** will add a "_1" to the end so it does not appear to be a duplicate. You may update/revise the Custom ID on this screen. Or, if you still wish to assign a **Custom ID** you may do it here.*

Note: *Custom IDs** are optional and updating the **Custom ID** should not be something data entry staff do every time they open a record. For this reason, the tab/enter key will skip over the field. Users will have to manually put their cursor in the Custom ID field to make an edit.*

: New Adult   ⊕ Remarks

| CONTACT INFO | ENTRY DATA | RECALLS | CHECKLISTS | EXIT DATA |

Staff Member
--Staff By Name-- ▼

Custom Id (?)

Enrollment Date
00/00/0000 📅

First Name   **Last Name**

Address Verification
County   **FIPS**

Group Name

Congressional District   **CBSA**

Address

Latitude   **Longitude**

City   **State**   **ZIP**   **Plus 4**
           DC ▼

Data can only be validated after this adult has been saved

Phone   **Ext**

Email

Cancel   Save

Tip: Fields outlined in red are required fields and must be filled in before the record can be saved.

Tip: Do not *Save* at this point. The record will not save until the **ENTRY DATA** is added. Clicking save will save all data entered on all tabs on the form so you do not have to click save every time a tab is completed.

SNAP-Ed: *SNAP-Ed users will not be able to see the Address Verification option on the right of the Contact Info Tab. This option is only available to EFNEP users.*

Entry Data Tab

1. Select the **ENTRY DATA** tab

CONTACT INFO   ENTRY DATA   RECALLS   CHECKLISTS   EXIT DATA
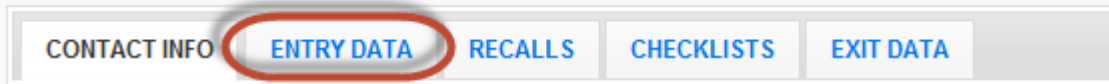
2. Complete the entry of the demographic information, as collected on the *Adult Entry/Enrollment* form. See the screen shot below.
3. Enter the **Age** of the participant
4. Indicate **Gender** of the participant
5. Indicate if **Pregnant** or **Nursing**

Note: *In the adult record enter pregnant or nursing if she is pregnant or nursing at any time during enrollment in the program. For recalls, enter pregnant or nursing only if she is pregnant or nursing at the time of the recall.*

6. Indicate **Ethnicity**
   a. Not Hispanic/Latino
   b. Hispanic/Latino
   c. Not provided
7. Indicate **Race** – Multiple races may be selected.

Note: *If "Hispanic" is provided for Ethnicity, a race should still be chosen.*

Tip: If tabbing through the data entry field, the space bar can be used to select/deselect checkboxes or items from a dropdown list

8. Indicate **Sub Race** – if necessary

Note: *Collecting additional information on Race/Ethnic Subcategories is optional. Race/Ethnic Subcategories are not required at the Federal level, nor is this information transmitted to the Federal level.*

9. Indicate **Highest Grade** completed

Highest Grade
✓ Not Supplied
Grade 6 or less
Grade 7
Grade 8
Grade 9
Grade 10
Grade 11
Grade 12
GED
Some College
Graduated 2-year College
Graduated College
Post Graduate
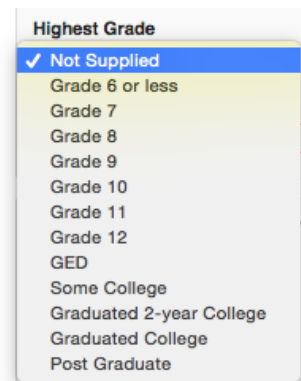
10. Indicate town size under **Residence**

      a. If **Default Profiles for New Adults** <u>were previously created</u>, that define the Residence Type and there is no need to enter that information again here.

      b. If **Default Profiles for New Adults** <u>were not previously created</u>, select the appropriate Residence Type in the box.

Residence

--Select One-- ▼
--Select One--
Farm
Towns under 10,000 & rural non farms
Towns and cities 10,000-50,000 and their suburbs
Suburbs of cities over 50,000
Central cities over 50,000

11. Indicate **Public Assistance** at Entry

Note: *Select all public assistance the participant indicates on the Adult Entry/Enrollment form.*

Note: *School Breakfast/Lunch is captured in the public assistance category Child Nutrition*

12. Record the **Household Income.** If not supplied, enter "N/S"

Note: *Household income should include wages, salaries, social security, welfare, insurance payments, pensions and cash support from others for all persons in the residence for the previous month. It should not include the value of SNAP benefits (formerly food stamps), WIC, or other supplemental foods program benefits.*

13. Record **Children**
    a. Children's ages must be separated by commas; do not use spaces
    b. Use 0 for infants
    c. Repeat child age for twins/multiples
    d. Do not include children over 19 years of age in this **Children** field
       Example: Children aged 1, 5, 7, and 13 would be entered 1,5,7,13; Twin example: 1,2,2,4

Children [(?)]

`1,5,7,13`

Children Age Breakdown
Ages 0-5: 2
Ages 6-13: 2
Ages 14-19: 0

Others In Household

Total Household

`5`

Note: *No space is entered between the comma and number(s).*

Note: *Children over age 19 years, living at home, are entered under Others in Household*

Note: *The **Children Age Breakdown,** automatically calculates. Double check to make sure the values in the age ranges accurately reflects the number of children by category*

14. Enter the **Others in Household**

Note: *This number should reflect all other adults in the household.*
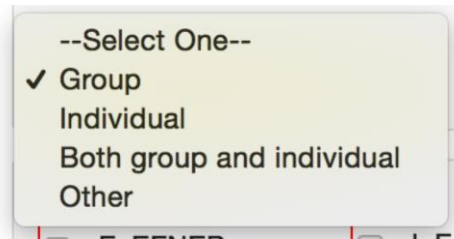
Note: *Children over age 19 years of age are captured in this field.*

Note: *The **Total Household** will automatically calculate and will include the participant.*

15. Indicate the **Lesson Type**

16. Indicate the appropriate **Subgroups**
    a. If **Default Profiles for New Adults** <u>were previously created</u>, that define the Subgroups, there is no need to select subgroups again unless there are additional subgroups or changes are needed.
    b. If **Default Profiles for New Adults** <u>were not previously created</u>, choose the appropriate Subgroups.

Note: *At least one Federal Subgroup (F) must be selected. The EFNEP Federal Subgroup will automatically be selected as the default in the EFNEP system.*

SNAP-Ed: *The SNAP-Ed Federal Subgroup will automatically be selected as the default in the SNAP-Ed system.*

Note: *You can select as many subgroups as appropriate. You can also change categories Federal (F), Institute (I), and Region (R). See Section 3: Setup: Customizing **WebNEERS** to Meet Local Needs for more information on this topic.*

   c. Select **Save** at the bottom of the screen

Note: *At this point, the adult contact information, demographic and program characteristic data have been entered into **WebNEERS** and the adult has been saved. Upon selecting Save– the user can enter recalls and/or checklists or click save again to exit the record and return to the Manage Adults table, which lists all enrolled adults.*

Note: *The remainder of the instructions below defines the appropriate steps for completing entry of the recall and checklist, without exiting the record. This can also be done through the **Manage Recalls** and **Manage Checklists** screens (see below).*

Entry Data Tab - Screenshot

Recalls Tab

1. Select the **RECALLS** tab

2. Select **Add Recall**

User will not have access to the Add Recall button or be able to Add a Recall until the record has been saved. The save process establishes the participant and allows users to enter recalls and checklists.

3. The **Recall Date** will automatically populate based on the entry or exit date.
   a. The calendar icon enables the use of a calendar popup to select a date for the date field located to the immediate left of the button
   b. If the recall date is different than the entry or exit date you can manually change the date by:
      i. Type manually - MM/DD/YYYY or
      ii. Select the Calendar Icon (📅) and choose the correct date
4. *Recall Type* will default *Entry* if it is the first recall entered.
   a. Recall Type will default to *Exit* if it is the second recall entered.
   b. Any additional recalls entered will default to *Additional*.
5. *Check the box to indicate the participant* **Is Pregnant**
6. check the box to indicate the participant **Is Nursing**

Note: *Pregnancy and nursing data will carry forward from the Adult entry tab. It should be modified as needed to indicate whether the adult is pregnant or nursing at the time of the recall*

Note: *The pregnancy and nursing information will not be visible for male participants.*

7. Check the box if the participant is **Taking Nutritional Supplements.**
8. Enter the **Amount Spent on Food Last Month.** If it is not supplied, enter "N/S".

Note: *Amount of money spent on food should include: money, SNAP benefits (formerly food stamps), WIC vouchers, etc. that adult has discretion over. It should not include items such as school lunch which is provided at no cost.*

9. *Indicate the* **Activity Level**

Foods Tab

1. Select the **FOODS** tab.

2. Select **Add Food.**

A search box will pop-up.

The Food Search compiles a list of the fifty (50) most commonly selected food items for your region. These will pre-populate the Food Search pop-up if recall data has been entered by any users within that region. You can select an item from the list of common selections or use the search field to find other food items.

3. Type the **Food Item** (or food code) you are looking for in the **Search** box and press enter.

It is best to start with fairly general words, such as milk rather than 2% milk.

   a. Use the exclamation point icon ( ) to view food details. Select the plus sign ( ) to add the food item to the food recall. Be sure to select the item that best represents the food item (consider nutritional content if it is a food item that doesn't exist in the database) on the participant's form.

Note: *The Food Quantity screen appears that gives options for Meal Type, Portion Size, and Number of Portions*

b. Select the **Meal Type**
c. Select the **Portion size** that appropriately reflects the measurement
d. Enter the **Number of Portions**

Note: *The Number of Portions options vary based on the food item.*

e. Select **Save** at the bottom of the popup screen

Note: *Moving between these fields can be accomplished by using the tab key or the mouse. If tabbing, a user must hit the space bar or the enter key to select and to "Save" the data.*

SELECT PORTION SIZE - CHICKEN NUGGETS ✖

Meal Type
Morning meal or snack
Midmorning meal or snack
Noontime meal or snack
Afternoon meal or snack
Evening meal or snack
Late evening meal or snack

Portion
1 nugget
1 stick
1 mini drum
1 cup
Quantity not specified
1 fast food kids' meal
1 cubic inch

Number of Portions
6

Save

4. Repeat Step 3 for all food and beverage items on the 24-Hour Diet Recall form

5. Select the **X** button (✖) at the top of the screen or **Done** at the bottom right, after all items are entered.

Tip: *Review the list of foods and quantity consumed against the 24-Hour Diet Recall form – make any necessary edits.*

Note: *When reviewing the list of foods on the Foods tab, there are three functions available under the Manage column:*

- *edit food items,(🔧)*
- *view food item details, (❗)and*
- *delete food items(❌).*

Note: *Once an item has been deleted, it cannot be undone.*

6. Select **Save** at the bottom of the screen. This will return you to the Recall tab within the adult record.

7. If desired, select the ***Print icon*** (🖨) under the **Manage** column, to generate the diagnostic reports. See ***Adult Reports*** section below for additional information.

Checklists Tab

1. Select the **CHECKLISTS** tab

| CONTACT INFO | ENTRY DATA | RECALLS | CHECKLISTS | EXIT DATA |
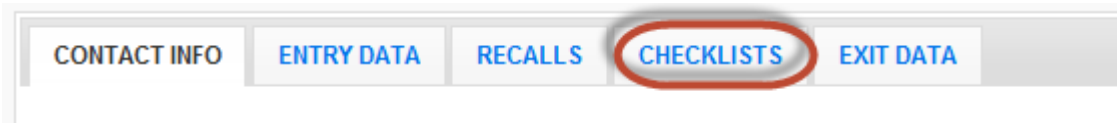
2. Select **Additional Question Set**, if appropriate

⊕ Add Checklist

Manage	Is Exit	Date
⚙ Select Additional Question Set		
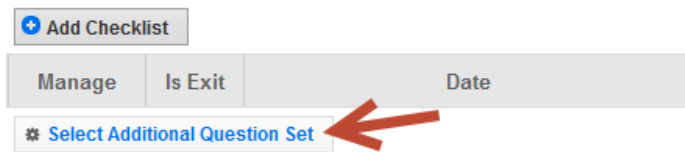
Note: *See the **Additional Question Set** section for more information.*

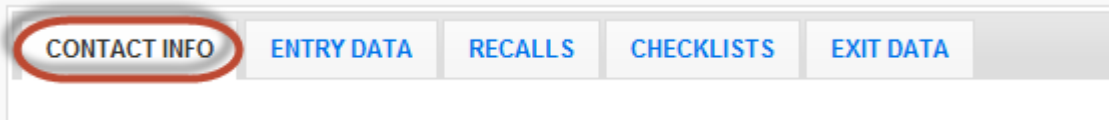3. Select the appropriate **Additional Question Set**, select **OK.**
4. Select **Add Checklist**

Note: *Users will not have access to the Add Checklist button or be able to Add a Checklist until the record has been saved. The save process establishes the participant and allows users to enter recalls and checklists.*

5. The **Checklist Date** will automatically populate based on the entry or exit date.
   a. If the checklist date is different than the entry or exit date you can manually change the date by:
   c. Type manually - MM/DD/YYYY or
   d. Select the Calendar Icon (📅) and choose the correct date
6. *Checklist Type* will default *Entry* if it is the first checklist entered.
   a. Checklist Type will default to *Exit* if it is the second checklist entered.
   b. Any additional checklists entered will default to *Additional.*
7. Enter the value of the responses to the **Ten-Core Questions**

Tip: *This can be done by choosing the appropriate field or by entering the number reflecting the corresponding answer in the "Response Column"*

8. Enter the value of the responses to the **Additional Questions**, if appropriate.
9. Select **Save** at the bottom of the screen.

Behavior Checklist Entry Screen with Additional Questions (will vary by institution)

462: LaVallie , Nicole

Checklist Date

| 00/00/0000 | 📅 |

Checklist Type

| Exit ▾ |

Ten Core Questions

Question	Response	0 N/A	1	2	3	4	5
1. Plan meals ahead							
2. Compare prices before you buy food							
3. Run out of food before the end of the month							
4. Shop with a grocery list							
5. Let foods sit out for more than two hours							
6. Thaw frozen foods at room temperature							
7. Think about healthy food choices							
8. Prepare foods without adding salt							
9. Use 'Nutrition Facts' on the label to make food choices							
10. Children eat within 2 hours of waking up							

Additional Questions

Question	Response	0 N/A	1	2	3	4	5
11. Do you wash hands before food preparation?							
12. Do you use a meat thermometer?							
13. How physically active are you?							
14. Are you physically active?							

| Cancel | Save |

10. If desired, select the ***Report icon*** (🔲) under the **Manage** column, to generate the diagnostic report. See ***Adult Reports*** section for additional information.

11. Select the **CONTACT INFO** tab

12. Select **Verify Address** (for EFNEP users only, SNAP-Ed users do not have this option)

If you receive an error message, correct the address, as appropriate. See
Address Verification section for additional information.

13. Select **Save** at the bottom of the screen

At this point, all adult entry information has been entered into the system and
you will be returned to the Manage Adults table, listing all enrolled adults.

Saving Adult Record: You will not be able to save the record until all
required information is entered. See red **Attention Needed** warnings on
the **Contact Info** and **Entry Data** screens.

On initial entry – the **Save** feature will save the record, but leave you
within the record. After the initial save, a second click on **Save** will return
you to the **Manage Adults** screen.

Remarks

The remarks field enables Region level users to add additional comments or information
to a participant record. No entry is required in this field.

Remarks are hidden from normal view. When remarks are entered and
saved, a reminder "Comments Available" in red text will be
displayed to the left of the remarks button.
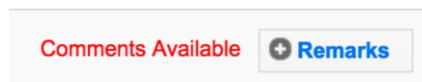
Viewing or Editing Information for Existing Participants

At any point after an adult participant has been successfully added to *WebNEERS*, the record may need to be reviewed and/or edited. The steps for reviewing/editing a record are defined below.

1. Select **Manage Adults** from the *WebNEERS Home page*, under the *Adults* section
2. Select the *Wrench icon ( )* under the **Manage** column, to the left of the adult
3. Edit/modify the appropriate fields for the adults. Changes can be made on any of the tabs; all required fields are outlined in red.
4. Select **Save** to save the changes to the adult and return to the Manage Adults page or select **Cancel** to exit without saving

> **Note:** *If required fields are not appropriately completed, the form will not save and the cursor will return to the first required field that is either empty or contains incorrect data*

> **Note:** *The user should only click **Save** after making all necessary edits. Clicking save will save data entered on all data entry tabs (Contact Info, Entry Data and Exit Data) so it does not need to be clicked more than once. It will also return the user to the Manage Adults screen.*

5. Watch for a notification message after saving in the upper right-hand corner, indicating either the save was successful or unsuccessful

Exiting Adults

After an adult participant has successfully completed the program or contact with the participant has ended, the adult's Program Status needs to be changed and exit information, such as date, exit reason, number of lessons, sessions and contact hours, as well as exit recalls and checklists, if appropriate, need to be added to the system.

1. Select **Manage Adults** from the *WebNEERS Home page*, under the *Adults* section
2. Select the *Wrench icon ( )* under the **Manage** column to the left of the adult you want to edit/view
3. Select the **EXIT DATA** tab

| CONTACT INFO | ENTRY DATA | RECALLS | CHECKLISTS | EXIT DATA |

4. Change the **Program Status** from *Active* to the appropriate exit status option
   a. Select *Educational Objectives Met*, if the participant completed the series (graduated)
   b. Select the appropriate exit reason, if the participant did not complete the series (terminated)

Status

Ed. Objectives met ▼
Active
Ed. Objectives met
Returned to school
Took a job
Family Concerns
Staff Vacancy
Moved
Lost Interest
Other
Other Obligations
Lost contact with client

Note: *"Other" should be used only when none of the other available options are appropriate and as a last resort.*

5. Enter the **Number of Lessons** the adult completed
6. Enter the **Number of Sessions** the adult completed. This will be how many times the educator met with the adult.
7. Enter the total **Number of Hours** - i.e., the total number of contact hours spent providing direct education to the adult.

Note: *Do not include the hours spent entering forms into **WebNEERS**, shopping for supplies, setting up the room, etc.*

8. Add any new forms of **Public Assistance** the adult is receiving as a result of a referral or suggestion from staff.

Note: *You will not be able to select a choice that was already selected under **Public Assistance** on **Entry Data** screen.*

Exit Data Tab Screen

| CONTACT INFO | ENTRY DATA | RECALLS | CHECKLISTS | **EXIT DATA** |

Status
Lost contact with client

Exit Date
09/29/2014

Number of Lessons
1

Number of Sessions
1

Number of Hours
1

Public Assistance at Exit (?)
- ☐ F: Child Nutrition
- ☐ F: FDPIR
- ☐ F: Head Start
- ☐ F: Other
- ☐ F: SNAP
- ☐ F: TANF
- ☐ F: TEFAP - Commodity
- ☐ F: WIC/CSPF

Cancel   Save

Note: *In order to **Save** the exit information, the user must select an appropriate **Exit Date**.*

Note: *Number of Lessons, Session and Hours should be filled in when the participant is exited from the program for any reason.*

Note: *For EFNEP, if the adult is marked as **Educational Objectives Met**, the adult **must** have an Exit Recall and an Exit Checklist. If not, he/she is not considered a graduate of the program.*

Deleting Adults

Deleting adults should be used rarely and done with caution. Generally only adults entered in error are deleted. Example: An EFNEP participant is entered into the SNAP-Ed system, or vice versa.

1. Select **Manage Adults** from the *WebNEERS Home page*

2. Select the *Delete icon (* *)* under the **Manage** column to the left of the adult

3. Select **Ok**, when prompted "***Are you sure you want to delete this adult?***" to delete the adult or select **Cancel**, when prompted "***Are you sure you want to delete this adult?***" to exit without saving and return to the list of adults

Note: *After an adult is deleted it cannot be restored.*
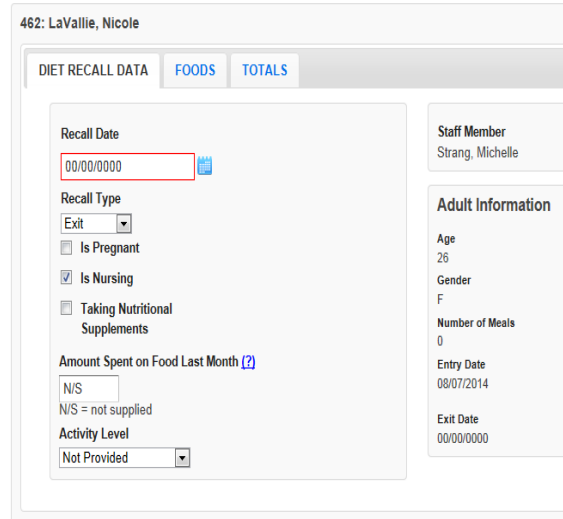
Managing Recalls

The managing recalls function enables the user to add, review/edit, or delete recalls contained within *WebNEERS* without having to access all data entered on the adult participant. This is also a way to quickly access and print diagnostic reports.

Adding a Recall

1. From the **WebNEERS Home** screen, under **Adults**, select **Manage Recalls**.
2. From **Manage Recalls** screen, find the adult to exit.

3. From the **Manage** column, select the *Wrench icon (* *)* icon to edit that record.
4. Select **Add Recall**

5. The **Recall Date** will automatically populate based on the entry or exit date.
   a. The calendar icon enables the use of a calendar popup to select a date for the date field located to the immediate left of the button
   b. If the recall date is different than the entry or exit date you can manually change the date by:
      i. Type manually - MM/DD/YYYY or
      ii. Select the Calendar Icon (📅) and choose the correct date

6. **Recall Type** will default **Entry** if it is the first recall entered.
   a. Recall Type will default to **Exit** if it is the second recall entered.
   b. Any additional recalls entered will default to **Additional**.

7. Check the box to indicate the participant **Is Pregnant**

8. Check the box to indicate the participant **Is Nursing**

Note: *Pregnancy and nursing data will carry forward from the Adult entry tab. It should be modified as needed to indicate whether the adult is pregnant or nursing at the time of the recall*

Note: *This option will not be visible for male participants*
   a.

9. Check the box if the participant is **Taking Nutritional Supplements**

10. Enter the **Amount Spent on Food Last Month.** If it is not supplied, enter "N/S"

Note: *Amount of money spent on food should include: money, SNAP benefits (formerly food stamps), WIC vouchers, etc. that adult has discretion over. It should not include items such as school lunch that is provided at no cost.*

11. Indicate the **Activity Level**

12. Select the **FOODS** tab

13. Select **Add Food**

A search box will pop-up.

The Food Search compiles a list of the fifty (50) most commonly selected food items for your region. These will pre-populate the Food Search pop-up if recall data has been entered by any users within that region. You can select an item from the list of common selections or use the search field to find other food items.

14. Type the **Food Item** (or food code) you are looking for in the **Search** box and press enter.

It is best to start with fairly general words, such as milk rather than 2% milk.

a. Use the exclamation point icon (**!**) to view food details. Select the plus sign (**+**) to add the food item to the food recall. Be sure to select the item that best represents the food item (consider nutritional content if it is a food item that doesn't exist in the database) on the participant's form.

Note: *The Food Quantity screen appears that gives options for Meal Type, Portion Size, and Number of Portions*

b. Select the **Meal Type**
c. Select the **Portion size** that appropriately reflects the measurement
d. Enter the **Number of Portions**

Note: *The Number of Portions options vary based on the food item*

e. Select **Save** at the bottom of the popup screen

Note: *Moving between these fields can be accomplished with the use of the tab key or the mouse. If tabbing, a user must hit the space bar or the enter key to select and to "Save" the data.*

SELECT PORTION SIZE - CHICKEN NUGGETS	✕

Meal Type
Morning meal or snack
Midmorning meal or snack
Noontime meal or snack
Afternoon meal or snack
Evening meal or snack
Late evening meal or snack

Portion
1 nugget
1 stick
1 mini drum
1 cup
Quantity not specified
1 fast food kids' meal
1 cubic inch

Number of Portions
6

Save

15. *Repeat steps 14* for all food and beverage items on the 24-Hour Diet Recall form

16. Select the **X** button (✕) at the top of the screen or **Done** at the bottom right, after all items are entered.

Note: *Review the list of foods and quantity consumed against the 24-Hour Diet Recall form – make any necessary edits.*

Note: *When reviewing the list of foods on the Foods tab, there are three functions available under the Manage column:*

- *edit food items,(🔧)*
- *view food item details, (!)and*
- *delete food items(⊗).*

17. Select **Save** at the bottom of the screen.

Note: *You will be returned to the recalls screen for the adult whose record was just being edited.*

18. If desired, select the *Print icon* (🖨) under the **Options** column, to generate the diagnostic reports. See *Adult Reports* section below for additional information.

Editing Food Recalls

1. Select **Manage Recalls** from the *WebNEERS Home page*

2. Select the *Wrench icon* (🔧) under the **Manage** column to the left of the adult whose recalls you want to access

3. Select the *Wrench icon* (🔧) to select the recall you wish to view/edit

4. Click on the **FOODS** tab

   a. Select the *Wrench icon* (🔧) in the **Manage** column to the left of the food item which needs to be edited, to edit **Meal Types**, **Portion Sizes**, **Number of Portions**

      i. If you edited a food item, select **Save** at the bottom of the pop-up screen to save any changes.

Note: *You will be returned to the recalls screen for the adult whose record was just being edited.*

   b. Select the *Exclamation Mark icon* (!) to view food item details, which include**:**

      i. **Food Group Data** *Per 100 gram weight of food*

Note: *This tab shows the food groups represented in the food item*

| Food Code | Name: |
| 57123000 | Cheerios |

| FOOD GROUP DATA | NUTRIENTS | WEIGHTS AND MEASURES |

Per 100 gram weight of food

Amounts	Description
3.379	Number of oz. equivalents of nonwhole grains (enriched, unenriched, and fortified) from the bread, cereal, rice, and pasta food group.
3.268	Number of oz. equivalents of whole grains from the bread, cereal, rice, and pasta food group.
0.111	Number of non-whole grain servings
0.793	Teaspoons of added sugars

ii. **Nutrients** *Per 100 gram weight of food*

Note: *This tab shows the nutrient values represented in the food item*

Food Code	Name:
57123000	Cheerios

FOOD GROUP DATA	NUTRIENTS	WEIGHTS AND MEASURES

Per 100 gram weight of food

Nutrient	Value
Protein	12g
Total Fat	6g
Carbohydrate	74g
Energy	369kcal

iii. **Weights and Measures**

Note: *This tab shows common measures for the food item*

Food Code	Name:
57123000	Cheerios

FOOD GROUP DATA	NUTRIENTS	WEIGHTS AND MEASURES

Gram Weight	Measure Description
1	10 Cheerios
30	1 cup
21	1 single serving box (.75 oz)
30	Quantity not specified

c. Select the Delete icon (❌) to remove food item(s) that was entered by mistake.

Note: *Once an item has been deleted, it cannot be undone.*

d. Select "Add Food" to add additional food items to the recall (see steps above)

5. Select **Save** from the Recalls screen to save Recall.

Note: *You will be returned to the recalls screen for the adult whose record was just being edited.*

Note: *Deleting a recall should only be done if the recall was entered accidentally. After a recall is deleted it cannot be restored.*

1. Select **Manage Recalls** from the *WebNEERS Home page*

2. Select the *Wrench icon* (🔧) under the **Manage** column to the left of the adult whose recall needs to be deleted

3. Select the *Delete icon* (❌) under the **Manage** column to the left of the recall you want to delete

4. Select **Ok**, when prompted "***Are you sure you want to delete this recall?***" to delete the recall or select **Cancel** to exit without deleting and to return to the list of recalls

Search Function – Food items

There are several new features implemented into the food search section of the *WebNEERS* recall section.

Levenshtein Distance

The Levenshtein Distance is a search algorithm that incorporates a robust approximate string matching algorithm *(for more information: http://en.wikipedia.org/wiki/Levenshtein_distance)*

Overview of the function:
While typing into the search box, word suggestions will begin to populate in a drop-down menu below the search box. This can help you search or be used to correct common spelling mistakes.

Example:
1. If you enter the word "Broccoli"; three (3) suggestions "broccoli, bracciola, and Brazil" will appear
2. You can then use the arrow keys on your keyboard or your mouse to select the word that best describes/represents the item you are looking for,
3. Then, after the item is in the search box, you can hit the enter key on your keyboard to search for results from the selected/corrected word.
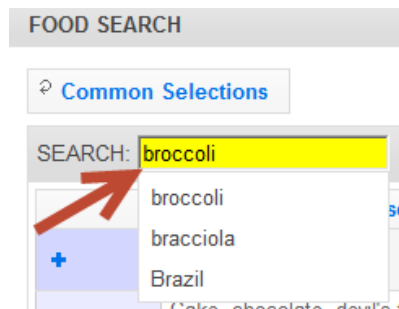
Automatic Fuzzy Match

There is a fuzzy match algorithm implemented on all searches. It attempts to return correct results even if characters are accidentally left out. This function works best on words longer than 5 characters.

Note: *Fuzzy matching is an advanced mathematical process that determines the similarities between data sets, information, and facts – where the outcome is neither true nor false, or 100 percent certain, hence the word, "fuzzy." The process compares any data type of any length and from any place in a field to find non-exact matches.*

Common Selections

WebNEERS automatically generates a list of the foods that are most commonly selected for the region. It creates a list of the top fifty (50) foods, ranked from most to least commonly selected foods.

This list will change over time, based on the selections that are being made.

Note: *When starting a new database, there will be no commonly selected foods until a few recalls have been entered into the system.*

Note: *If there are multiple users within a particular region, the commonly selected foods will populate based on the selections of all users.*

Loading the Common Selections

At any time, the user can replace the most recent food search with the common selections by clicking the **Common Selections** button at the top of the **Food Search** popup.
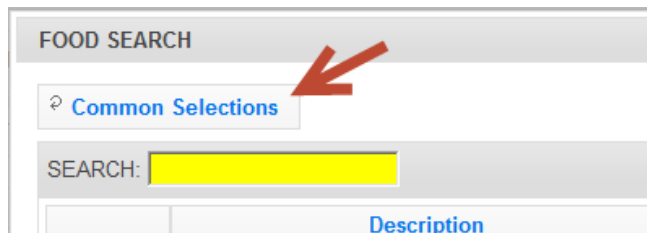
Food Sorting

WebNEERS automatically returns results in the **Food Search** popup in order of "*Best Match*". In general, the string closest to the user's search term(s) will show up first in the list. The algorithm used to determine the closeness of the two strings is the Levenshtein Distance. See Levenshtein Distance section above for more information on this topic.

Diagnostic Reports Available:

The following reports are available within WebNEERS for use with participants:
- One Day Recall Report
- One Day Recall Report - Spanish Version
- Food Recall Review

Accessing Diagnostic Reports

Recall diagnostic reports can be accessed in two ways:

1. From within an **Adult record**, by clicking on the **Recalls** tab and selecting the **Print icon** (🖨) in the **Manage** column to the left of the recall you want to generate a recall report for

2. From the **Manage Recalls** screen, by selecting the **Wrench icon (** 🔧 **)** to the left of the adult whose recall(s) you want to generate the diagnostic report(s) for and then selecting the **Print icon** (🖨) to the left of the recall
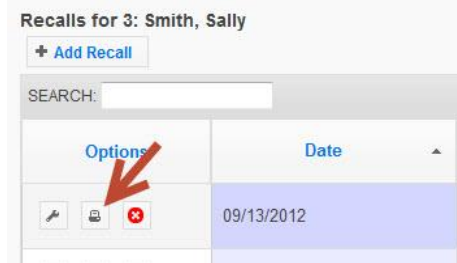
3. A pop-up screen with the list of reports will appear in a table format.
   - The **PDF option** allows users to easily print or e-mail reports.
   - The **On-Screen option**, allows the user to view the report on the screen.

PRINT REPORT				✕
One Day Recall Report				
	Name Included		Name Omitted	
English	🔍 On-Screen	🖨 PDF	🔍 On-Screen	🖨 PDF
Spanish	🔍 On-Screen	🖨 PDF	🔍 On-Screen	🖨 PDF

Food Recall Review		
	Name Included	Name Omitted
English	🔍 On-Screen	🔍 On-Screen

4. Select the option you want to display, print or email the report.

Managing Checklists

The manage checklist function enables the user to add, review/edit, or delete behavior checklist surveys contained within *WebNEERS* without having to access all data entered on the adult participant. This is also a way to quickly access and print diagnostic report.

Adding a Checklist

1. From the **WebNEERS Home** screen, under **Adults**, select **Manage Checklists**.
2. From **Manage Checklists** screen, find the adult.
3. From the **Manage** column, select the *Wrench icon* (🔧) icon to edit that record.
4. Select the **Additional Question Set** button, if appropriate.
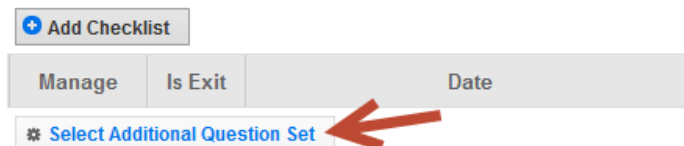
*See the **Additional Question Set** section for more information.*

5. Select the appropriate **Additional Question Set**, select **OK.**
6. Select **Add Checklist.**
   a. The checklist is displayed with the participant's ID and name.
7. The **Checklist Date** will automatically populate based on the entry or exit date.
   a. If the checklist date is different than the entry or exit date you can manually change the date by:
      i. Type manually - MM/DD/YYYY or
      ii. Select the Calendar Icon (📅) and choose the correct date

8. **Checklist Type** will default *Entry* if it is the first checklist entered.
    a. Checklist Type will default to *Exit* if it is the second checklist entered.
    b. Any additional checklists entered will default to ***Additional.***
9. Enter the value of the responses to the **Ten-Core Questions**
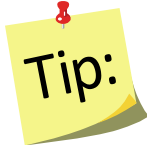
Tip: *This can be done by choosing the appropriate field or by entering the number reflecting the corresponding answer in the "Response Column"*

Note: *Additional checklists, if selected, will appear directly below the 10 core questions. Additional checklist questions will only appear if they have been activated from the <u>institute level</u>.*

10. Enter the value of the responses to the **Additional Questions**, if appropriate.

Behavior Checklist Entry Screen with Additional Questions (will vary by institution)

462: LaVallie , Nicole

Checklist Date

00/00/0000

Checklist Type

Exit

Ten Core Questions

Question	Response	0 N/A	1	2	3	4	5
1. Plan meals ahead							
2. Compare prices before you buy food							
3. Run out of food before the end of the month							
4. Shop with a grocery list							
5. Let foods sit out for more than two hours							
6. Thaw frozen foods at room temperature							
7. Think about healthy food choices							
8. Prepare foods without adding salt							
9. Use 'Nutrition Facts' on the label to make food choices							
10. Children eat within 2 hours of waking up							

Additional Questions

Question	Response	0 N/A	1	2	3	4	5
11. Do you wash hands before food preparation?							
12. Do you use a meat thermometer?							
13. How physically active are you?							
14. Are you physically active?							

Cancel   Save

11. Select **Save** at the bottom of the screen.

You will be returned to the checklists screen for the adult whose record was just being edited.

12. If desired, select the **Report icon** (▣) under the **Manage** column, to generate the diagnostic report. See ***Adult Reports*** section for additional information.

Editing a Checklist

1. Select **Manage Checklists** from the *WebNEERS Home page*

2. Select the **Wrench icon** (🔧) under the **Manage** column to the left of the adult whose checklist you want to access

3. Select the **Wrench icon** (🔧) to the left of the checklist you want to edit
4. Edit/modify the **Checklist Data**, as appropriate
5. Select **Save** at the bottom of the screen to save the edits and exit the checklist or **Cancel** to exit without saving

You will be returned to the checklists screen for the adult whose record was just being edited.

6. If desired, select one of the two **Report icons** (▣) under the **Manage** column, to generate the diagnostic reports. See ***Adult Reports*** section below for additional information.

Deleting a Checklist

Deleting a checklist should only be done if the checklist was entered accidentally. After a checklist is deleted it cannot be restored.

1. Select **Manage Checklists** from the *WebNEERS Home page*

2. Select the **Wrench icon** (🔧) under the **Manage** column to the left of the adult whose checklist needs to be deleted

3. Select the **Delete icon** (❌) under the **Manage** column to the left of the checklist you want to delete
4. Select **Ok**, when prompted "***Are you sure you want to delete this checklist?***" to delete the checklist or select **Cancel** to exit without deleting and return to the list of checklists.
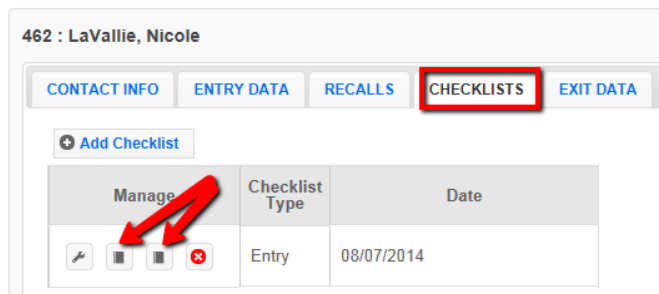
Checklist Diagnostic Report

The following reports are available within WebNEERS for use with participants:

- Checklist Diagnostic Report
- Checklist Diagnostic Report without Participant Name

Accessing Checklist Diagnostic Report

The Checklist Diagnostic Report can be accessed in two ways:

1. From within an **Adult record**, by clicking on the **Checklists** tab and selecting one of the two **Report icons** (⬜) in the **Manage** column to the left of the checklist you want to generate a diagnostic report for; the first icon is the full report and the second icon is the same report, but without the participant's name.

2. From the **Manage Checklists** screen, by selecting the **Wrench icon** (🔧) to the left of the adult whose checklist(s) you want to generate the diagnostic report(s) for and then selecting one of the two **Report icons** (⬜) to the left of the checklists ; the first icon is the full report and the second icon is the same report without the participant's name.
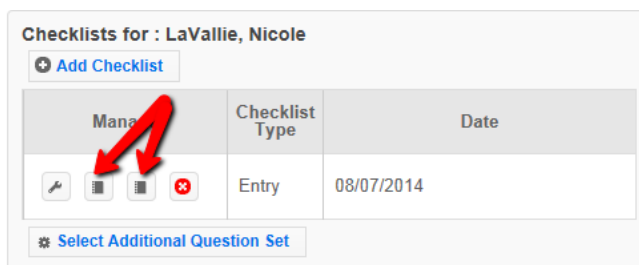
Additional Question Sets

Additional Question Sets can be created at the Institute level.

To Create:

1. At the Institute level, select **Manage Adult Checklist Sets** from the *WebNEERS Home Page,* under the *Checklists* section.
2. Select **Add Adult Checklist Set**

3. Enter a **Question Set Name.** This is the name that will display in the list of additional checklists at the Region level.
4. Enter a **Set ID.** The **Set ID** can be a short name for the question set. It must be a unique value
5. Select the questions you would like to add to the Checklist Set. Questions that are selected will show at the very bottom of the page.

Note: *Adult questions sets are limited to a maximum of 20 questions.*

Note: *If the question bank doesn't meet your needs, WebNEERS has an advanced feature that allows you to create your own question. If you are interested in that option, please refer to the Create Your Own Question instructions.*

6. You may activate the question set for **Regions** now by selecting the appropriate regions listed at the bottom of the page. If you do not activate the question set here, you may activate the question set later by following the details below on ***Activating Question Sets***.
7. If needed, reorder your question set in the **Sort Selected Questions** section by clicking on the arrows (↕) next to each question and dragging and dropping the question above or below its current position.
8. Select **Create.** *WebNEERS* will return you to the Manage Adult Checklists table.

Note: *All available Question Sets are listed in the table. You may view (▦), edit (🔧), or delete (❌) the question sets you created by selecting the corresponding icon next to the question set.*
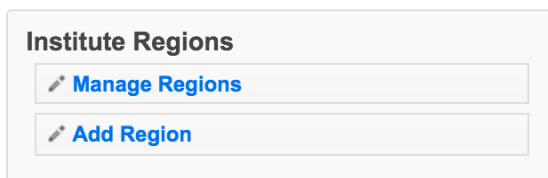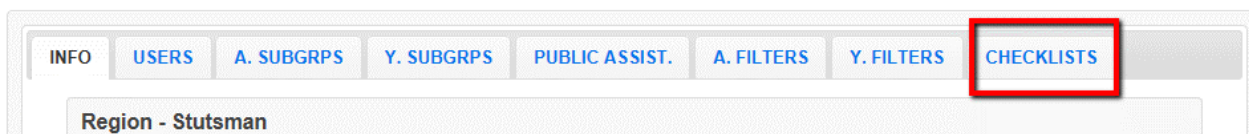
Note: *Once a question set is in use by a region, only the report icon (▦) will display next to the question set. This is to ensure data integrity for the reporting period.*

To Activate Questions Sets for Regions

Checklist Question Sets can be added to new or different regions AFTER creation. At the Institute level, select **Manage Regions** from the *WebNEERS Home page,* under the *Institute Regions* section.

Institute Regions

- 🖊 **Manage Regions**
- 🖊 **Add Region**

1. Select the **wrench icon** (🔧) next to the region you want to add a Question Set to.
2. Select the **Checklists** tab.

| INFO | USERS | A. SUBGRPS | Y. SUBGRPS | PUBLIC ASSIST. | A. FILTERS | Y. FILTERS | CHECKLISTS |

Region - Stutsman

3. Click the add icon (➕) next to the question set(s) you wish to add to that region. You will receive a message asking if you are sure you want to add the question set. Select **OK.**

Note: *To remove the question set(s) from a region, use the (➖) icon.*

4. Repeat steps 2-4 to add a question set to other regions.

Note: *There is no save option on the **Regions** screen, once you click Ok, the change is saved.*

Address Verification (EFNEP Only)

The address verification option standardizes and corrects address information and provides information on adult participants' county, congressional district, and Core Based Statistical Area (CBSA), a geographic area defined by the Office of Management and Budget (OMB) based around an urban center of at least 10,000 people and adjacent areas that are socioeconomically tied to the urban center by commuting. These data are used to create filtered reports at the Institute level, and can be used to create Graphic Information Systems (GIS) maps in the future.

Note: *Verifying the address is OPTIONAL; if the user chooses not to verify the address, it will not prevent the record from saving and moving on with data entry.*

Note: *Using the address verification function has no security concerns. The actual data the user enters into the system is not being transferred or stored anywhere. A data string is sent via a secure https: server (not a website) and is 'bounced' against a USPS dataset. This allows **WebNEERS** to instantly verify the address entered, as well as ensure standard and correct addresses are captured.*

Tip: *Use GD or General Delivery for addresses that are not recognized. This will "force" the system to use only the zip code for verification and help with accuracy of reports by congressional district at the <u>Institute level.</u>*

Note: *EFNEP users can capture information about the county FIPS code, Congressional District, CBSA (core based statistical area), Latitude and Longitude. These fields are not directly editable by the user. These fields can be populated automatically by: a) verifying the address after saving the form or b) using the batch address verification system. See below.*

The Process

The process for verifying addresses for adult participants can occur in two ways.

In an Adult Record

1. Selecting **Verify Address** on the **Contact Info** tab within an adult record. See **Adding Adults** for more information on this topic.

   Note: *The Verify Address button is only available after the adult record is saved for the first time.*

Batch Verification

1. Select **Verify Addresses** from the *WebNEERS Home page*, under the *Adults* section
2. A popup message will appear in the upper-right hand corner of the screen indicating "*Address Verification In Process*".

   At the conclusion of the verification process, which may take several minutes, a second popup message will appear providing a status on the verification process.

   Note: *If at any time during the process you close the "**Address Verification in Process**" window or select a new tab or link, the process will stop. However, the process can be resumed later by completing the step above.*

EFNEP Alert
Addresses verified for 0 adults out of 21 total. Some addresses could not be verified due to insufficient or inaccurate information

Adult Reports

The adult reports available through *WebNEERS* range from individual diagnostic reports, see *Recall Diagnostic Reports* above, to Region level aggregated data, representing the demographics and output data, through Region/Institute level outcome data from summary reports. The reports are a valuable resource to program managers/nutrition supervisors, as well as frontline staff for use with participants. *WebNEERS* reports are available as onscreen reports (via *WebNEERS* or saved as PDFs), printed reports, or as exports that include raw data.

> **Tip:** *Reporting Period dates are automatically populated and used to pull all available data for the current reporting period into the report. It is only necessary to enter dates to view the data for a specific period of time within the reporting period.*

Report Period

To include all currently available data for this reporting period, leave the begin and end dates "00/00/0000". To view a subset of the data, enter specific dates.

Begin Date

10/01/2014

End Date

09/30/2015

Adult Mailing Labels

Adult Mailing Labels are available at the Region level. They can be printed and used to send additional materials, lessons or information to current or past participants. Participant addresses should never be shared or distributed to outside sources without prior written consent.

1. Select **Adult Mailing Labels** from the *WebNEERS Home page*, under the *Reports* section
2. Select the **Filter** you want to use to generate the labels
3. Select the **Label Type** (Avery 5160 and 5164 are listed)
4. Select the **Print Direction**
   a. Horizontal - Adults are placed on labels first left to right and next top to bottom.
   b. Vertical - By selecting this option, adults will print first top to bottom and then left to right. This is useful when the labels being used are perforated in columns and the user would like to take advantage of them while still maintaining the labels in the correct order.
5. Select the **Sort**
   a. **Zip Code** - sorts by the zip code of the adult participant in ascending numeric order
   b. **Name** - Sorts by the last name of the adult participant in ascending alphabetical order.

6. If you want to run the report for specific dates, enter the **Reporting Period Begin Date** and **End Date.**
   a. Type manually as MM/DD/YYYY or
   b. Select the Calendar Icon (📅) and choose the correct date
7. Enter the **Data Selection**
   a. **Entire Unit** - print labels for all adults in the region
   b. **By Staff Member –** prints labels for only the adults associated with the selected staff member
   c. **Zip Code** - only generates mailing labels for adults who report a zip code that matches the zip code entered
8. Select the **Program Status**
   a. **All –** returns mailing labels for all adults, regardless of status
   b. **Grads Only –** returns mailing labels for adults whose status is "Educational Objectives Met"
   c. **Active Only –** returns mailing labels for adults whose status is "Active"
9. Select **Submit** located at the bottom of the screen to run the mailing list or **Cancel** to exit without viewing it
10. Select the output of the report

Selection	# of Adults	Options
All Adults	35	🖨 📄

   a. For PDF: Select the **Print icon** (🖨)

> **Note:** *The *.pdf is useful if the user wishes to print the labels directly from a file. If selected a browser window will open and the file will automatically begin to download.*

> **Note:** *If "by staff member" is selected, you need to select the **Print icon** (🖨) - or - the **Download icon** (📄) to the right of the staff member to get the labels to appear.*

   b. For Spreadsheet: Select the **Download icon (** 📄 **)**

> **Note:** *This option exports a *.csv file which can be opened with most standard database programs, for modification, or with most standard word processing software packages, for mail merges. If selected a browser window will open and the user will be asked to choose a destination for the file to be saved.*

Email Lists are available at the Region level. The email list *.csv option exports a file which can be opened with most standard databases, word processing, and spreadsheet programs, for modification and/or inclusion in email programs. This can be used to contact or follow-up with participants. Email addresses should never be shared or distributed to outside sources without prior written consent.

1. Select **Adult Email List (CSV)** from the *WebNEERS Home page*, under the *Reports* section
2. Select the **Filter** you want to use to generate the email list
3. If you want to run the report for specific dates, enter the **Reporting Period Begin Date** and **End Date**
   a. Type manually as MM/DD/YYYY or
   b. Select the Calendar Icon (🗓) and choose the correct date

*If no dates are selected, **WebNEERS** will pull all available data for the current reporting period. It is only necessary to enter dates if a specific subset of the data is needed.*

4. Select a **Program Status**
   a. **All** - returns emails for all adults, regardless of status
   b. **Grads Only** - returns emails for adults whose program status is "Educational Objectives Met"
   c. **Active Only** - returns emails for adults whose program status is "Active"
5. Enter the **Data Selection**
   a. **Entire Unit** - returns emails for all adults
   b. **By Staff Member** returns emails for only the adults associated with the selected staff member

*This option generates an *.CSV file for the selected staff member. If this option is selected you need to select the **Wrench icon** (🔧) next to the name of the staff member you want to run the email list for.*

   c. **Zip Code** - only generates a list of emails for adults who report a zip code that matches the zip code entered
6. Select **Submit** located at the bottom of the screen to run the email list or **Cancel** to exit without viewing it

7. Select **Ok**, after indicating **Open with** *<insert file type>* or **Save File** in the popup message.
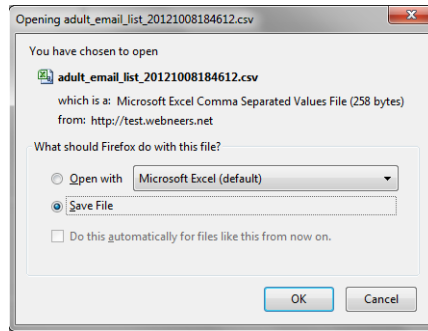
a. **Open (with)** will result in the list of emails being opened with the default spreadsheet software package on the computer. If you chose this option, you need to save the *.csv for later use or copy the emails and paste them into another software package.

b. **Save File/Save/Save As** will result in a message prompting you to indicate where the file should be saved. Make sure you make note of the location you saved the file so you can access it later.

List of Families by Staff Member

The List of Families by Staff Member Report is available at the Region level. This report can be run as a short version (List of Families) or a detailed version (Detail List of Families). The short version allows a user to see basic information about adult participants per each staff person. The detailed version allows a user to see all pertinent information about adult participant per each staff person.
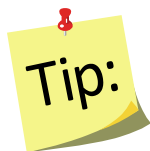
Tip: The onscreen view of these two reports allows users to quickly review their data for accuracy. Users can click on the column headings to sort ascending or descending. The drop-down on the top right of the table can be used to view more or less records.

Tip: On the Detailed List of Families, there is a scroll bar underneath the table that allows you to view all data points.

1. Select **List of Families by Staff Member** from the *WebNEERS Home page*, under the *Reports* section

2. Select the **Filter** you want to use to generate the report

3. If you want to run the report for specific dates, enter the **Reporting Period Begin Date** and **End Date**
   a. Type manually as MM/DD/YYYY or
   b. Select the Calendar Icon ( ) and choose the correct date

   Note: *If no dates are selected, **WebNEERS** will pull all available data for the current reporting period. It is only necessary to enter dates if a specific subset of the data is needed.*

4. Select **Staff Selection**
   a. For a single staff person: choose the name of the staff from the list

   Note: *After submitting the form, see below, the user will be taken to an intermediate page where the selected staff member's report can be viewed.*

   b. For all staff: leave the selection –All Staff—

   Note: *This selection will provide information on all available staff who have data available for this report.*

   Note: *After submitting the form, see below, the user will be forwarded to an intermediate page where an individual staff member or "all staff" can be selected from the list for review.*

5. Select a **Program Status**
   a. **All** - returns data for all adults
   b. **Active Only** - returns only "*Active*" participants
   c. **Graduates** - returns only adults with Program Status "*Educational Objectives Met*"
   d. **Terminated** – returns only adults who have exited the program without graduation
6. Select **Sort By**
   a. **By ID** – Sorts by adult ID in ascending order
   b. **By Name** – Sorts by adult last name in ascending order
7. Select **Format**
   a. **List of Families** - Provides basic information about the adults
   b. **Detail List** - Provides complete information about the adults
   c. **Detail List (Remove Name, Address and Phone)** – Provides the same information as detail list, but with personally identifiable information removed
8. Select **Submit** located at the bottom of the screen to view the report or **Cancel** to exit without viewing it

9. Select the ***Magnifying Glass (Preview) icon*** to the right of the staff member you want to view or print the report for.
    a. Select the (🗂 **PDF**) button at the top of the screen to save or print a PDF copy of the report.
    b. Use the (Copy Print Download) buttons on the top right of the data table to:
        i. **Copy** the data. This allows you to paste it into another file type.
        ii. Open a **Print** preview of the data.
        iii. **Download** the data into a **.CSV* or an *Excel* file for additional analysis.

Recall List Report

The Recall List Report is available at the Region level. This report can be used to review the recall data for adult participants. It allows a user to quickly compare entry and exit values for Foods, Nutrients, etc. as well as to see if entry or exit data is missing for each participant.

1. Select **Recall List Report** from the ***WebNEERS Home page***, under the ***Report*** section
2. Select the **Filter** you want to use to generate the report
3. If you want to run the report for specific dates, enter the **Reporting Period Begin Date** and **End Date**
    a. Type manually as MM/DD/YYYY or
    b. Select the Calendar Icon (📅) and choose the correct date

Note: *If no dates are selected, **WebNEERS** will pull all available data for the current reporting period. It is only necessary to enter dates if a specific subset of the data is needed.*

4. Select **Staff Selection**
    a. For a single staff person: choose the name of the staff from the list

Note: *After submitting the form, see below, the user will be taken to an intermediate page where the selected staff member's report can be viewed.*

    b. For all staff: leave the selection –All Staff—

Note: *This selection will provide information on all available staff who have data available for this report.*

Note: *After submitting the form, see below, the user will be forwarded to an intermediate page where an individual staff member or "all staff" can be selected from the list for review.*

5. Select a **Program Status**
    a. **All** - returns data for all adults
    b. **Active Only** - returns only "*Active*" participants
    c. **Graduates** - returns only adults with Program Status "*Educational Objectives Met*"
    d. **Terminated** – returns only adults who have exited the program without graduation
6. Select **Sort By**
    a. **By ID** – Sorts by adult ID in ascending order
    b. **By Name** – Sorts by adult last name in ascending order
7. Select **Privacy**
    a. Make no selection, in which case the participant's name will be displayed
    b. Select **Omit Participant's Name**, in which case the name will be removed
8. Select **Submit** located at the bottom of the screen to view the report or **Cancel** to exit without viewing it
9. Select the *Magnifying Glass (Preview) icon* to the left of the staff member you want to view or print the report for.
10. To download the report, select the **Download PDF** button at the top of the screen.

> **Note:** *If the report is downloaded, you will be prompted to select a location to save the file. Make sure you make note of the location for later access.*

Adult Checklist Review

The Adult Checklist Review Report is available at the Region level. This report can be used to review the checklist data for adult participants. It allows a user to quickly compare entry and exit values for questions (core or additional) as well as to see if entry or exit data is missing for each participant.

1. Select **Adult Checklist Review** from the *WebNEERS Home page*, under the *Reports* section
2. Select **Adult Selection**
    a. **Entire Unit** – show all adults in *the region*
    b. **Staff** – shows the adults by staff member.

> **Note:** *If the staff option is selected, you will need to select the **Magnifying Glass (Preview) icon** to the left of the staff member you want to view the report for on step 8.*

3. Select **Question Selection**
    a. **Core Questions** – generates the report for the 10 federal questions only
    b. **Additional Questions** – generates the report for any of the additional question sets used

4. Select **Privacy**
    a. make no selection, in which case the participant's name will be displayed
    b. select **Omit Participant's Name**, in which case the name will be removed
5. Select **Sort**
    a. **By ID** – Sorts by adult ID in ascending order
    b. **By Name** – Sorts by adult last name in ascending order
6. Select a **Program Status**
    a. **All** - returns data for all adults
    b. **Active Only** - returns only "*Active*" participants
    c. **Graduates** - returns only adults with Program Status "*Educational Objectives Met*"
    d. **Terminated** – returns only adults who have exited the program without graduation
7. Select **Submit** located at the bottom of the screen to view the report or **Cancel** to exit without viewing it
8. Select the *Magnifying Glass (Preview) icon* to the left of the staff member you want to view the report for, if needed.
9. To print the report, select the **Print** button at the top of the screen**.**

Adult Summary

The Adult Summary Report is available at the Region and Institute levels. It provides the aggregated demographic data on all adult participants.

Region Level

1. Select **Adult Summary** from the *WebNEERS Home page*, under the *Reports* section
2. Select the **Filter** you want to use to generate the report
3. If you want to run the report for specific dates, enter the **Reporting Period Begin Date** and **End Date**
    a. Type manually as MM/DD/YYYY or
    b. Select the Calendar Icon (🗓) and choose the correct date

Note: *If no dates are selected, **WebNEERS** will pull all available data for the current reporting period. It is only necessary to enter dates if a specific subset of the data is needed.*

4. Enter the Data Selection
    a. Entire Unit - generate the report for the entire unit
    b. By Staff Member

Note: *If this option is selected, the user will need to select the **Magnifying Glass (Preview) icon** to the left of the staff member you want to view or print the report for on step 7.*

c. **Zip Code** - only generates a list of adults who report a zip code that matches the zip code entered

5. Select a **Program Status**
   a. All - returns data for all adults
   b. Graduates - returns only adults with Program Status "Educational Objectives Met"
   c. Terminated – returns only adults who have exited the program without graduation

6. Select **Submit** located at the bottom of the screen to view the report or **Cancel** to exit without viewing it.

7. Select the *Magnifying Glass (Preview) icon* to the right of the report to view.

8. To print the report, select the **Print** button at the top of the screen.

Institute Level

1. Select **Adult Summary** from the *WebNEERS Home page*, under the *Summary Reports* section

2. Select the **Filter** you want to use to generate the report

3. Select the **Regions** to be included in the report. To view all regions together, select "*Select All*"

Note: *A region selection is required.*

4. If desired, select the **Congressional Districts, Core Based Statistical Areas (CBSA)** and/or **Counties** to be included

Note: *Congressional Districts, CBSAs and Counties are only available if addresses of the adults were verified by the Region level users. If you wish to include all data (including those records without a valid or a verified address) leave this section blank or select the 'All Congressional Districts', 'All CBSAs' and/or 'All Counties.' Otherwise, use the checkboxes to select the specific information you want to include in your report under each of these sections. Please note, the County is based on the address entered in WebNEERS. This may be different than the 'region' you setup. They may not be mutually exclusive.*

Tip: Selecting Congressional Districts, CBSAs and Counties along with regions affects report results. They form "AND" statements - must be in X AND Y to show up in the report. So, for example, If you select a County and a Congressional District along with your regions, adults will only show up in the report if their addresses are verified, they are in one of the regions selected, AND they are in the Congressional District AND the CBSA.

5. If you want to run the report for specific dates, enter the **Reporting Period Begin Date** and **End Date**
   a. Type manually as MM/DD/YYYY or
   b. Select the Calendar Icon (📅) and choose the correct date

Note: *If no dates are selected, **WebNEERS** will pull all available data for the current reporting period. It is only necessary to enter dates if a specific subset of the data is needed.*

6. Select a **Program Status**
   a. **All** - returns data for all adults
   b. **Graduates** - returns only adults with Program Status "*Educational Objectives Met*"
   c. **Terminated** – returns only adults who have exited the program without graduation
7. Select **Submit** located at the bottom of the screen to view the report or **Cancel** to exit without viewing it
8. Select the *Magnifying Glass (Preview) icon* to the right of the report to view.
9. To print the report, select the **Print** button at the top of the screen.

Adult Diet Summary

The Adult Diet Summary Report is available at the <u>Region</u> and <u>Institute levels</u>. It provides the aggregated data and graphics from the adult diet recalls.

Region Level

1. Select **Adult Diet Summary** from the *WebNEERS Home page*, under the *Reports* section
2. Select the **Filter** on you want to use to generate the report
3. If you want to run the report for specific dates, enter the **Reporting Period Begin Date** and **End Date**
   a. Type manually as MM/DD/YYYY or
   b. Select the Calendar Icon (📅) and choose the correct date

Note: *If no dates are selected, **WebNEERS** will pull all available data for the current reporting period. It is only necessary to enter dates if a specific subset of the data is needed.*

4. Enter the **Adult Selection**
   a. **Entire Unit** – generate the report for the entire unit
   b. **By Staff Member**

Note: *If this option is selected, the user will need to select the **Magnifying Glass (Preview) icon** to the left of the staff member you want to view or print the report for on step 6.*

   c. **Zip Code** - only generates a report for those adults who report a zip code that matches the zip code entered
5. Select **Submit** located at the bottom of the screen to view the report or **Cancel** to exit without viewing it
6. If you selected Entire Unit or Zip Code in step 4, above, select the **Magnifying Glass (Preview) icon** to the right of the report you want to view; If you selected By Staff, select the **Magnifying Glass (Preview) icon** to the right of the staff person you want to view the report for
7. Select **Reports & Graphs** to be viewed/printed
   a. **Preview Adult Diet Summary Report** – the aggregate of all data from pre and post –education 24-hour diet recalls, including those who may have exited with an exit code other than "*Educational Objectives Met*", but still have pre and post-recall data
   b. **Graph – Food Group Improvement** – pre and post-education reported food group improvements (grains, whole grains, fruits, vegetables, protein foods, dairy, oils, solid fats and added sugars)
   c. **Graph – Calories Among Energy Sources** – pre and post-education distribution among energy sources (carbohydrates, fats and proteins)
   d. **Graph – Distribution of Nutrient Intake** - pre and post-education distribution among nutrients (calcium, fiber, sodium, potassium, iron, vitamins A, B6, B12, C, D, folate)
   e. **Graph – Nutrient Intake – Grads** – pre and post-education distribution of nutrients for graduated participants
   f. **Graph – Eat More/Eat Less** – mean reported consumption of food items and nutrients at entry and at exit as compared to recommendations; divided by items we typically should eat more of (whole grain, vegetables, fruit, etc.) and items we should typically eat less of (calories from solid fats and added sugars (SOFAS), refined grains, sodium, saturated fat)
8. To print the report or graphs, select the **Print** button at the top of the screen.

Institute Level

1. Select **Adult Diet Summary** from the *WebNEERS Home page*, under the *Summary Reports* section.
2. Select the **Filter** you want to use to generate the report.

3. Select the **Regions** to be included in the report. To view all regions together, select "***Select All***".

Note: *A region selection is required.*

4. If desired, select the **Congressional Districts, Core Based Statistical Areas (CBSA)** and/or **Counties** to be included.

Note: *Congressional Districts, CBSAs and Counties are only available if addresses of the adults were verified by the region level users. If you wish to include all data (including those records without a valid or a verified address) leave this section blank or select the 'All Congressional Districts', 'All CBSAs' and/or 'All Counties.' Otherwise, use the checkboxes to select the specific information you want to include in your report under each of these sections. Please note, the County is based on the address entered in WebNEERS. This may be different than the 'region' you setup. They may not be mutually exclusive.*

Tip: Selecting Congressional Districts, CBSAs and Counties along with regions affects report results. They form "AND" statements - must be in X AND Y to show up in the report. So, for example, If you select a County and a Congressional District along with your regions, adults will only show up in the report if their addresses are verified, they are in one of the regions selected, AND they are in the Congressional District AND the CBSA.

5. If you want to run the report for specific dates, enter the **Reporting Period Begin Date** and **End Date**
   a. Type manually as MM/DD/YYYY or
   b. Select the Calendar Icon (📅) and choose the correct date

Note: *If no dates are selected, **WebNEERS** will pull all available data for the current reporting period. It is only necessary to enter dates if a specific subset of the data is needed.*

6. Select **Submit** located at the bottom of the screen to view the report or **Cancel** to exit without viewing it
7. Select the **Preview Adult Diet Summary Report** button to view the report or Select the **Graph buttons** to view graphs for Food Group Improvement, Calories Among Energy Sources, Distribution of Nutrient Intake, Nutrient Intake for Graduates, or Eat More/Eat Less (see Region level instructions for descriptions of the report and graphics)
8. To print the report or graph, select the **Print** button at the top of the screen.

Adult Checklist Summary

The Adult Checklist Summary Report is available at the <u>Region</u> and <u>Institute levels</u>. It provides the aggregated data and graphics from the adult behavior checklists.

Region Level

1. Select **Adult Checklist Summary** from the *WebNEERS Home page*, under the *Reports* section
2. Select the **Filter** you want to use to generate the report
3. If you want to run the report for specific dates, enter the **Reporting Period Begin Date** and **End Date**
   a. Type manually as MM/DD/YYYY or
   b. Select the Calendar Icon (📅) and choose the correct date

Note: *If no dates are selected, WebNEERS will pull all available data for the current reporting period. It is only necessary to enter dates if a specific subset of the data is needed.*

4. Enter the **Data Selection**
   a. **Entire Unit** – generate the report for the entire unit
   b. **By Staff Member**

Note: *If this option is selected, the user will need to select the Magnifying Glass (Preview) icon to the left of the staff member you want to view or print the report for on step 6.*

   c. **Zip Code** - only generates a report for those adults who report a zip code that matches the zip code entered
5. Select **Submit** located at the bottom of the screen to view the report or **Cancel** to exit without viewing it
6. If you selected Entire Unit or Zip Code in step 4, above, select the *Magnifying Glass (Preview) icon* to the right of the report you want to view; If you selected By Staff, select the *Magnifying Glass (Preview) icon* to the right of the staff person you want to view the report for
7. Select **Reports & Graphs** to be reviewed/printed
   a. **Preview Adult Checklist Summary Report** – the aggregate of all data from pre and post –education behavior checklists, including those who may have exited with an exit code other than "*Educational Objectives Met*", but still have pre and post-checklist data
   b. **Graph –Improved Practices** – Bar graph showing improved practices on food resource management, nutrition practices, and food safety
   c. **Graph – Desirable Practices** –Bar graph showing changes in desirable practices (scored at an acceptable level on all questions within a construct) on the

practices of food resource management, nutrition practices, food safety, and for all three constructs together

8. To print the report or graphs, select the **Print** button at the top of the screen.

Institute Level

1. Select **Adult Checklist Summary** from the *WebNEERS Home page*, under the *Summary Reports* section
2. Select the **Filter** you want to use to generate the report
3. Select the **Regions** to be included in the report. To view all reports together, select "*Select All*"

Note: *A region selection is required.*

4. If desired, select the **Congressional Districts, Core Based Statistical Areas (CBSA)** and/or **Counties** to be included

Note: *Congressional Districts, CBSAs and Counties will only be available if addresses of the adults were verified by the region level users. If you wish to include all data (including those records without a valid or a verified address) leave this section blank or select the 'All Congressional Districts', 'All CBSAs' and/or 'All Counties.' Otherwise, use the checkboxes to select the specific information you want to include in your report under each of these sections. Please note, the County is based on the address entered in WebNEERS. This may be different than the 'region' you setup. They may not be mutually exclusive.*

Tip: Selecting Congressional Districts, CBSAs and Counties along with regions affects report results. They form "AND" statements - must be in X AND Y to show up in the report. So, for example, If you select a County and a Congressional District along with your regions, adults will only show up in the report if their addresses are verified, they are in one of the regions selected, AND they are in the Congressional District AND the CBSA.

5. If you want to run the report for specific dates, enter the **Reporting Period Begin Date** and **End Date**
   a. Type manually as MM/DD/YYYY or
   b. Select the Calendar Icon (📅) and choose the correct date

Note: *If no dates are selected, **WebNEERS** will pull all available data for the current reporting period. It is only necessary to enter dates if a specific subset of the data is needed.*

6. Select **Submit** located at the bottom of the screen to view the report or **Cancel** to exit without viewing it
7. Select the ***Magnifying Glass (Preview) icon*** to the right of the report to view
8. Select the **Preview Adult Checklist Summary Report button** to view the report or Select the **Graph buttons** to view graphs for Improved Practices or Desirable Practices (see <u>Region level</u> instructions for descriptions of the report and graphics)
9. To print the report, select the **Print** button at the top of the screen.

Subgroups List

The Subgroup List is available at the <u>Region</u> and <u>Institute levels</u>. It can be used to view the list of Federal, Institute and Region Adult subgroups available to that user.

Note: *<u>Region level</u> subgroups can only be viewed by <u>Region level</u> users*

Region Level

1. Select **Subgroup List** from the ***WebNEERS Home page***, under the ***Reports*** section
2. Review the list on the screen or print by selecting the **Print** button at the top of the screen

Institute Level

1. Select **Adult Subgroup List** from the ***WebNEERS Home page***, under the ***Setup – Reports*** section
2. Review the list on the screen or print by selecting the **PDF** button at the top of the screen

Filter List

The Filter List is available at the <u>Region and Institute levels</u>. It can be used to view the list of Federal, Institute and Region Adult filters available to that user.

Note: *<u>Region level</u> filters can only be viewed by <u>Region level</u> users*

Region Level

1. Select **Filter List** from the ***WebNEERS Home page***, under the ***Reports*** section
2. Review the list on the screen or print by selecting the **PDF** button at the top of the screen

Institute Level

1. Select **Adult Filter List** from the *WebNEERS Home page*, under the *Setup - Reports* section
2. Review the list on the screen or print by selecting the **PDF** button at the top of the screen

Public Assistance List

The Public Assistance List is available at the Region and Institute levels. It can be used to view the list of Federal, Institute and Region Adult Public Assistance Programs available to that user.

Note: *Region level public assistance programs can only be viewed by Region level users.*

Region Level

1. Select **Public Assistance List** from the *WebNEERS Home page*, under the *Reports* section
2. Review the list on the screen or print by selecting the **PDF** button at the top of the screen

Institute Level

1. Select **Adult Public Assistance List** from the *WebNEERS Home page*, under the *Setup – Reports* section
2. Review the list on the screen or print by selecting the **PDF** button at the top of the screen

Browse Adult Data

Browse Adult Summary – Institute Level

The Browse Adult Summary screen provides a snapshot of the number of adults in WebNEERS that fit within each of the Federal and Institute level filters, by region. This is a quick way to see in real time if data entry is complete. Use the search box on the top to quickly narrow results by filter or by region.

1. Select **Browse Adult Summary** from the *WebNEERS Home page*, under the *Browse* section
2. The data will be displayed on the screen.

Browse Adult Diet Summary – Institute Level

The Browse Adult Diet Summary screen provides a snapshot of the number of adults with entry and exit recalls in WebNEERS that fit within each of the Federal and Institute level filters, by region. This is a quick way to see in real time if data entry is complete. Use the search box on the top to quickly narrow results by filter or by region.

1. Select **Browse Adult Diet Summary** from the ***WebNEERS Home page***, under the ***Browse*** section
2. The data will be displayed on the screen.

Browse Adult Checklist Summary – Institute Level

The Browse Adult Checklist Summary screen provides a snapshot of the number of adults with entry and exit checklists in WebNEERS that fit within each of the Federal and Institute level filters, by region. This is a quick way to see in real time if data entry is complete. Use the search box on the top to quickly narrow results by filter or by region.

1. Select **Browse Adult Checklist Summary** from the ***WebNEERS Home page***, under the ***Browse*** section
2. The data will be displayed on the screen.

Section 6 – Managing Youth - Adding, Editing, and Reporting

Managing Youth - Adding, Editing, and Reporting

The Youth Section is used to add, edit and view Youth Group related information. Managing youth groups is only possible as a <u>Region level</u> user.

It is essential that all information gathered, from participants and paraprofessionals, is entered accurately. As this is the information that generates the reports for submission to the <u>Institute</u> and the <u>Federal levels</u>, the data entry person is key to an accurate, comprehensive, and quality report.

Managing Youth Groups

Youth <u>group</u> information (aggregated totals for each youth group) is entered for both demographic and program data. However, beginning with program year FY2013 (10/01/2012 – 09/30/2013), <u>individual</u> pre-post survey information is being captured for youth education. See **EFNEP Evaluation - Youth Program** for more information.

Adding New Youth Groups

1. Log into the appropriate *WebNEERS* system (EFNEP or SNAP-Ed)

> **Note:** *Remember EFNEP and SNAP-Ed data are entered on different sites.*
> *The https address for **EFNEP** is:*
> *https://www.webneers.net*
> *The https address for **SNAP-Ed** is:*
> *https://snap.webneers.net*

2. Select **Manage Youth Groups** from the *WebNEERS Home page*
3. Select **Add Youth Group**
4. Select a **Staff Member** from the list of available staff

> **Note:** *Remember staff must be entered before adults or youth groups can be entered. If the staff member is not listed, select **Cancel** and return to the **WebNEERS Home page**; enter the desired staff member as a new staff member. See Section **4: Manage Staff** for instructions on adding Staff*

Staff Member
--Staff By Name-- ▼

Custom ID
[   ]

Youth Group Default
--Select Default-- ▼

[Cancel] [Next]

> **Tip:** Type the first letter of the staff person's last name in the Staff drop-down to quickly locate the record of interest.

5. Assign a **Custom ID** or leave it blank for an ID to be generated by WebNEERS at creation

Note: *IDs are shared across all regions so numbers may appear to be missing as new youth groups are added to the system.*

6. Select **Youth Group Default** from the list of available defaults or skip to step 7

Note: *Defaults need to be established before this step can be used. If defaults are not established, but you want to use them, see Section 3 Setup: Customizing WebNEERS to Meet Local Needs for more information on this topic.*

Note: *If a staff member is selected from the Add Staff screen, it will automatically override the staff member selected in the adult default. If the default already indicates an assigned staff member, it is advised that the user not select a staff member (step 4 above) to avoid possible confusion or incorrect data.*

7. Select **Next** to continue creating this youth group, select **Cancel** to exit without saving

Contact Information Tab

1. Enter the official name of the Youth Group in the Name field at the top of the form.

Note: *This will be used on all Youth Group reports.*

2. Enter the **Mailing Name, Address, City, State and Zip** for the group

Note: *The Mailing Name field is the name that will be used on the mailing labels.*

Note: *EFNEP users can capture information about the county FIPS code, Congressional District, CBSA (core based statistical area), Latitude and Longitude. These fields are not directly editable by the user. These fields can be populated automatically by: a) verifying the address after saving the form or b) using the batch address verification system. See Verifying Addresses in this section for more information on this topic.*

3. Enter the **Phone Number** – including area code**, Extension** and **Email address** associated with this youth group
   a. Fields outlined in red are required fields and must be filled in before the record can be saved.

4. Editing a **Custom ID**
    a. A Custom ID can be added or changed on the Demographics tab on any staff member at any time.
    b. The system will confirm that the Custom ID is unique (i.e., hasn't been used). If it is unique, the record can be saved and the Custom ID will be updated.
    c. If a Custom ID is the same as a previously assigned System ID, then WebNEERS will add a "_1" to the end so it does not appear to be a duplicate.

5. <u>Do not</u> *Save* at this point. The record will not save until the **ENTRY DATA** is added.

Clicking save will save all data entered on all tabs on the form so you do not have to click it every time a tab is completed.

SNAP-Ed users will not be able to see the Address Verification option on the right of the Contact Info Tab. This option is only available to EFNEP users.

LEADERS Tab

CONTACT INFORMATION	**LEADERS**	ENTRY & EXIT DATA	DEMOGRAPHICS	YOUTH CHECKLIST

1. The primary leader should be preselected based upon the user's earlier selection, but it may be changed by selecting a different name from the drop-down
2. Additional Leaders may be selected by checking the box to the left of their name

ENTRY & EXIT DATA Tab

CONTACT INFORMATION	LEADERS	**ENTRY & EXIT DATA**	DEMOGRAPHICS	YOUTH CHECKLIST

1. Enter the **Start Date**
   i.   Type manually - MM/DD/YYYY format or
   ii. Select the Calendar Icon (📅) and choose the correct date
2. The **Program** default is based on the system you are logged into - e.g., EFNEP in the EFNEP version of WebNEERS; SNAP-Ed in the SNAP-Ed version. If the default is incorrect, select the appropriate Program for this youth group
   A | EFNEP
   B | SNAP-Ed
   C | Other
3. Indicate the appropriate **Delivery Mode** for the program (see chart for definitions).

Tip: Type the letter associated with the **Delivery Mode** in the drop-down to quickly locate the record of interest.

Note: *4-H Youth are any youth taking part in programs provided as a result of action by **extension personnel** (professional, paraprofessional, and volunteer). This includes youth participating in programs conducted through 1862, 1890, and 1994 land-grant universities, **EFNEP**, urban gardening, and other programs that may not actually use the 4-H name and emblem with participants.*

Youth Delivery Mode	Definition
E - 4-H Club Membership	A club is an organized group of youth, led by an adult, with a planned program that is carried on throughout all or most of the year. Clubs may meet in any location and typically have elected officers and a set of rules approved by the membership to govern the club, or for very young groups, other developmentally appropriate structures and operating processes. This may include organized community clubs, during- or after-school clubs, or military clubs.
F – 4-H Special Interest/Short Term Programs	Groups of youth meeting for a specific learning experience that involves direct teaching by extension staff or trained volunteers, including teachers. Program is not part of school curriculum. Multiple-day meetings, for example on college campuses, should be reported as short-term programs.
I – 4-H Camping programs	Youth taking part in an Extension-planned educational experience of group living in the out-of-doors. Day camping consists of multiple-day programs, with youth returning home each evening. Overnight camping includes being away from home at least one night (resident, primitive, or travel camping).
J – School Enrichment Programs	Groups of youth receiving a sequence of learning experiences in cooperation with school officials during school hours to support the school curriculum. Involves direct teaching by extension staff or trained volunteers, including teachers.
L – After School Programs	After-School educational programs offered to youth outside of school hours, usually in a school or other community center. The after-school program must be supported by Extension by training the after-school staff, infusing elements such as conducting needs assessments, evaluations, and/or resource development. The primary purpose of the program is to provide care, developmental and educational experiences for children and youth while parents are working or unavailable.
M – Instructional TV/Video/Web Program	Youth offered learning experiences through Extension via broadcast or closed circuit television, including satellite transmission, or videotape replays of such series. May also include instruction delivered by internet.

4. Select **Subgroups**

Note: *At least one Federal Subgroup (F) must be selected. The EFNEP Federal Subgroup will automatically be selected as the default in the EFNEP system;*

SNAP-Ed: *The SNAP-Ed Federal Subgroup will automatically be selected as the default in the SNAP-Ed system.*

Note: *You can select as many subgroups as appropriate for the group. You can also change or add additional subgroups, as needed. There are three potential categories Federal (F), Institute (I), and Region (R). See **Section 3: Setup: Customizing WebNEERS to Meet Local Needs** for more information on this topic.*

Tip: If tabbing through the data entry fields, the space bar can be used to select/deselect checkboxes

5. Enter the **End Date**
   i. Type manually - MM/DD/YYYY format or
   ii. Select the Calendar Icon (📅) and choose the correct date

Note: *If entering youth group at start, you may skip to the Demographics Tab and complete the exit information later. See **Viewing and Editing Existing Youth Groups** to add this information later.*

6. Enter the **Number of Lessons** the youth group completed
7. Enter the **Number of Sessions** the youth group completed. This will be how many times the educator met with the youth group.
8. Enter the total **Number of Hours** - i.e., the total number of contact hours spent providing direct education to the youth group

Note: *Do not include the hours spent entering forms into WebNEERS, shopping for supplies, setting up the room, etc.*

9. Enter the total **Number of Graduates**

Youth Graduates are defined by the institution. Criteria used to determine graduates will vary among institutions. For EFNEP, It should include completion of pre- and post- checklists, but may also include number of lessons attended or other requirements.

DEMOGRAPHICS Tab

The totals for each category on the Demographics tab (except Youth in Other 4-H) must be equal or you will receive an error message and you will not be able to save the information until the error is corrected.

1. Enter the **Number of Youth also in 4-H**

This should be the number of youth who participate in traditional 4-H

2. Enter the number of **Youth By Gender**
3. Enter the number of **Youth By Residence**
4. Enter the number of **Youth By Grade**

Note: *When entering youth by grade, the "Special" category should be used for participants in a special educational program due to mental or physical handicaps. Participants who are not in a grade due to participating in an alternative educational system or having dropped out of school should be marked as the grade that corresponds to their age.*

5. Indicate the **Total Youth By Race/Ethnicity**

Note: *When entering Youth by Race/Ethnicity, the following race codes are used:*
- *AI or AN: American Indian or Alaska Native*
- *NH or OPI: Native Hawaiian or Other Pacific Islander*

6. Click on the **Race Subcategories** button and enter the number of participants for each race subcategory, if necessary

Note: *Collecting additional information on Race/Ethnic Subcategories is optional. Race/Ethnic Subcategories are not required at the Federal level, nor is this information transmitted to the Federal level.*

7. Select **Save** at the bottom of the screen

Note: *The entry of the individual youth pre- and post-education survey information cannot occur until the record is saved.*

Note: *If the user selects **Save** a second time, the youth group will close and the user will be redirected to the Manage Youth Groups screen.*
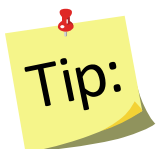
Tip: If pre- and post-education data are available and you want to enter them at the time the youth group is added to WebNEERS, select **Save** once and continue to follow the steps below. Otherwise, select **Save** twice to exit the youth group for later editing/addition of checklist data.

Demographics Tab - Screenshot

New Youth Group

⊕ Remarks

| CONTACT INFORMATION | LEADERS | ENTRY & EXIT DATA | DEMOGRAPHICS | YOUTH CHECKLIST |

Number of Youth in 4-H

Youth By Gender

Female	0
Male	0
Total	0

Youth By Residence

Farm	0
< 10,000 & Rural	0
10,000-50,000	0
Suburbs > 50,000	0
City > 50,000	0
Total By Residence	0

Youth By Grade

Pre-K	0
K	0
1st Grade	0
2nd Grade	0
3rd Grade	0
4th Grade	0
5th Grade	0
6th Grade	0
7th Grade	0
8th Grade	0
9th Grade	0
10th Grade	0
11th Grade	0
12th Grade	0
Special	0
Total by Grade	0

Total Youth By Race / Ethnicity

		Not Hispanic / Latino	Hispanic or Latino	Not Provided	Total By Race
Only One Race	AI or AN	0	0	0	0
	Asian	0	0	0	0
	Black	0	0	0	0
	NH or OPI	0	0	0	0
	White	0	0	0	0
	Not given	0	0	0	0
Multiple Races	AI or AN and White	0	0	0	0
	Asian and White	0	0	0	0
	Black and White	0	0	0	0
	AI or AN and Black	0	0	0	0
	All Others	0	0	0	0
	Total by Ethnicity	0	0	0	0

⊡ Race Subcategories

Total Youth with Subraces

0

YOUTH CHECKLIST Tab

When adding a checklist for youth within a youth group, there are two methods for accomplishing the task. The first is to add the checklists at the time the group is added to **WebNEERS**, the second is to add the information at a later time. Detailed below are the instructions for completing the task as part of the initial entry. Details on adding the checklist after the group has been saved can be found under **Adding Checklists** in the **Manage Checklists** section.

| CONTACT INFORMATION | LEADERS | ENTRY & EXIT DATA | DEMOGRAPHICS | YOUTH CHECKLIST |

1. Select the appropriate Federal Checklist (age appropriate) from the **-- Federal Checklist --** dropdown

    -- Federal Checklist--
    K-2nd
    3rd-5th
    6th-8th
    9th-12th
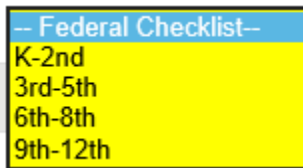
Note: *This step must be completed before clicking on the Add Checklist button.*

2. Select the appropriate **Institute** Checklist, from the **-- Institute Checklist --** drop-down, if required

3. Select **Add Checklist**
    a. Enter **Youth Identifier**

Note: *The youth identifier must be unique inside of this youth group and can be either numeric or text based. Youth identifiers can be repeated in different youth groups and across regions; they only need to be unique within each youth group.*

    b. Enter the **Checklist Entry Date**
        i. Type manually - MM/DD/YYYY format or
        ii. Select the Calendar Icon (📅) and choose the correct date
    c. Enter the **Checklist Exit Date**
        i. Type manually - MM/DD/YYYY format or
        ii. Select the Calendar Icon (📅) and choose the correct date

Note: *If the start and end dates are entered on the Entry & Exit Data Tab, the dates will pre-populate when the checklist is added.*

d. Enter the value of the responses to the **Federal Question Set** for entry and exit.

Note: *This can be done by choosing the appropriate field or by entering the number reflecting the corresponding answer in the "Response Column". Review Scoring and Data Entry Instructions for each evaluation grade to ensure correct entry. For example, instructions will indicate when a response should be entered as a 0 and when it should be left blank.*

Note: *The K-2nd Survey must be scored before it is entered. For help, see the Scoring and Data Entry Instructions*

e. Enter the value of the responses to the **Additional Questions** for entry and for exit, if appropriate.

Note: *Additional checklists, if selected, will appear directly below the federal questions for entry and below the federal questions for exit.*

f. Select **Save** at the bottom of the screen and it will bring you back to Youth Checklist Tab or select **Save and Add New** to enter another of the same checklist. Select **Cancel** to exit without saving.

Note: *Repeat the steps beginning with adding a Youth Identifier to enter new checklists for each youth. If there are youth within the same group that completed different sets of checklists you will have to enter them according to the survey groups. This can still be done within the same youth group.*

Note: *The total number of checklists cannot exceed the total number of youth in a group. So, if there are 10 youth in a group, no more than 10 checklists can be added. The top right of the Youth Checklist tab can be used to see how many youth are in the group, how many checklists have been added, and how many are matched.*

Select the CONTACT INFORMATION tab

| CONTACT INFORMATION | LEADERS | ENTRY & EXIT DATA | DEMOGRAPHICS | YOUTH CHECKLIST |

1. Select **Verify Address** (for EFNEP users only, SNAP-Ed users do not have this option)

Note: *If you receive an error message, correct the address, as appropriate. See Address Verification section for additional information.*

2. Select **Save** at the bottom of the screen

Note: *At this point, the complete youth group information has been entered into the system and you will be returned to the Manage Youth Groups table, listing all youth groups.*

Remarks

The remarks field enables Region level users to add additional comments or information to youth group record. No entry is required in this field.

Note: *Remarks are hidden from normal view. When remarks are entered and saved, a reminder "**Comments Available**" in red text will be displayed to the left of the remarks button.*

Comments Available ⊕ Remarks

Viewing or Editing Existing Youth Groups

At any point after a youth group has been successfully added to **WebNEERS**, the record may need to be reviewed and/or edited. The steps for reviewing/editing a record are defined below.

1. Select **Manage Youth Groups** from the **WebNEERS Home page**
2. Select the **Wrench icon (   )**, under the **Manage** column, to the left of the youth group
3. Edit/modify the appropriate fields for the youth group. Changes can be made on any of the tabs; all required fields are outlined in red.
4. Select **Save** to save the changes to the youth group and return to the Manage youth groups page or select **Cancel** to exit without saving

5. Watch for a notification message after saving in the upper right-hand corner, indicating either the save was successful or unsuccessful

Deleting Existing Youth Groups

Deleting youth should be used rarely and done with caution. Generally only youth groups entered in error are deleted. Example: An EFNEP youth group is entered into the SNAP-Ed system, or vice versa.

1. Select **Manage Youth Groups** from the *WebNEERS Home page*

2. Select the **Delete icon ( )**, under the **Manage** column, to the left of the youth group

3. Select **Ok**, when prompted "*Are you sure you want to delete?*" to delete the youth group or select **Cancel** to exit without saving and return to the list of youth groups

Manage Checklists

The ability to add checklists for youth is new with *WebNEERS*. Each youth participant completes a pre- and post-education evaluation survey, much like the adult participants, but with a few key differences. The question sets are age appropriate, the youth are not identified by name, and the **Entry** and **Exit Checklists** are accessed and entered at the same time.

The manage checklist function enables the user to add, review/edit, or delete checklist surveys contained within *WebNEERS* without having to access all data entered on the youth group. This is also a way to quickly access and print Youth Group Checklist Summary reports.

Adding Checklists

When adding a checklist for youth within a youth group, there are two methods for accomplishing the task. The first is to add the checklists at the time the group is added to *WebNEERS*, the second is to add the information at a later time. Detailed above are

the instructions for completing the task as part of the initial entry. Detailed below is the process for adding the checklist after the group has been saved and the user has been returned to the **Manage Youth Groups** or *WebNEERS Home page*.

1. Select **Manage Checklists** from the *WebNEERS Home page*

2. Select the **Wrench icon ( )**, under the **Manage** column, to the left of the youth group into which the youth checklist data are to be entered

3. Select the appropriate **Federal** checklist (age appropriate) from the --**Federal Checklist --** drop-down

-- Federal Checklist--
K-2nd
3rd-5th
6th-8th
9th-12th
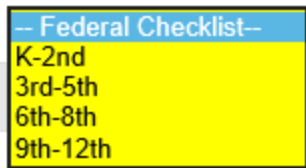
Note: *This step must be completed before clicking on the Add Checklist button.*

4. Select the appropriate **Institute** checklist from the **-- Institute Checklist --** dropdown, if required.
5. Select **Enter Checklist Answers** on the left above the table of checklists.
6. Enter a **Youth Identifier**
7. Enter the **Entry Checklist Date**
   a. Type manually as MM/DD/YYYY or
   b. Select the Calendar Icon ( ) and choose the correct date
8. Enter the **Exit Checklist Date**
   a. Type manually as MM/DD/YYYY or
   b. Select the Calendar Icon ( ) and choose the correct date

Note: *If the start and end dates are entered on the Entry & Exit Data Tab first, the dates will pre-populate when the checklist data is added.*

9. Enter the value of the responses to the **Federal Question Set** for entry and exit.

> Note: *This can be done by choosing the appropriate field or by entering the number reflecting the corresponding answer in the "Response Column". Review Scoring and Data Entry Instructions for each evaluation grade to ensure correct entry. For example, instructions will indicate when a response should be entered as a 0 and when it should be left blank.*

> Note: *The K-2nd Survey must be scored before it is entered. For help, see the Scoring and Data Entry Instructions.*

10. Enter the value of the responses to the **Additional Questions** for entry and for exit, if appropriate.

11. Select **Save** to save the checklist and return to the manage youth checklist page, **Save and Add New** to enter another checklist or select **Cancel** to exit without saving and return to the manage youth checklist page

12. Repeat the steps 5 through 11 for each additional youth survey.

View/Editing a Checklist

1. Select **Manage Checklist** from the *WebNEERS Home page*

2. Select the **Wrench icon (   )**, under the **Manage** column, to the left of the youth group

3. Select the **Wrench icon (   )**, under the **Manage** column, to the left of the youth checklist to be edited

4. Edit/modify the **Checklist data**, as appropriate

5. Select **Save** to save the checklist and return to the manage youth checklist page or select **Cancel** to exit without saving and return to the manage youth checklist page

Deleting a Checklist

Note: *Deleting a checklist should only be done if the checklist was entered accidentally. After a checklist has been deleted it cannot be restored.*

1. Select **Manage Checklist** from the *WebNEERS Home page*

2. Select the **Wrench icon ( )** under the **Manage** column to the left of the youth group

3. Select the **Delete icon ( )** under the **Manage** column to the left of the youth checklist you want to delete

4. Select **Ok**, when prompted "*Are you sure you want to delete*?" to deleting the checklist or select **Cancel** to exit without deleting and to return to the list of checklists

Youth Group Checklist Report

The Youth Group Checklist Report is available at the Region level. It provides a one-page impact report for youth groups as long as there is at least five matched checklists per checklist type (ex. K-2, 3-5, 6-8 or 9-12)

Access from the Manage Checklists Screen:

1. Click on **Manage Checklists** in the *Youth Groups* section

2. Click on the report icon ( ).

Manage	ID ▾	Staff ⬍	Name ⬍	# of Youth ⬍	# of entry/exit checklists ⬍
🔧 🖨	209	Johnson, Nicole | A10	WF Toepke-Peterson10	9	8

Access from the Manage Youth Groups Screen:

1. Click on **Manage Youth Groups** in the *Youth Groups* section

2. Click on the report icon ( ).

Additional Question Sets – Institute Level

Additional Question Sets can be created at the Institute level.

To Create:

At the Institute level, select **Manage Youth Checklist Sets** from the *WebNEERS Home page*, under the *Checklists* section.

1. Select **Add Youth Checklist Set**
2. Select **Grade Level** and Okay.
3. Enter a **Question Set Name.** This is the name that will display in the drop-down at the Region level.
4. Enter a **Set ID.** The **Set ID** can be a short name for the question set. It must be a unique value
5. Select the questions you would like to add to the Checklist Set. Questions that are selected will show at the very bottom of the page.

Note: *Youth questions sets are limited to a maximum of 5 questions.*

Note: *Currently there isn't a question bank for youth questions, but WebNEERS has an advanced feature that allows you to create your own question. If you are interested in that option, please refer to the Create Your Own Question instructions.*

6. You may activate the question set for **Regions** now by selecting the appropriate regions listed at the bottom of the page. If you do not activate the question set here, you may activate the question set later by following the details below on how **To Activate for Regions**.
7. If needed, reorder your question set in the Sort Selected Questions section by clicking on the arrows (⬍) next to each question and dragging and dropping the question above or below its current position.
8. Select **Create.** *WebNEERS* will return you to the Manage Youth Checklists table.

Note: *All available Question Sets are listed in the table. You may view (▣), edit (🔧), or delete (⊗) the question sets you created by selecting the corresponding icon next to the question set.*

Note: *Once a question set is in use by a region, only the report icon (▣) will display next to the question set. This is to ensure data integrity for the reporting period.*

To Activate Question Sets for Regions:

Checklist Question Sets can be added to new or different regions AFTER creation. At the <u>Institute level</u>, select **Manage Regions** from the *WebNEERS Home page,* under the *Institute Regions* section.

Institute Regions

✏ **Manage Regions**

✏ **Add Region**

1. Select the **wrench icon** (🔧) next to the region you want to add a Question Set to.
2. Select the **Checklists** tab.

INFO	USERS	A. SUBGRPS	Y. SUBGRPS	PUBLIC ASSIST.	A. FILTERS	Y. FILTERS	CHECKLISTS

Region - Stutsman
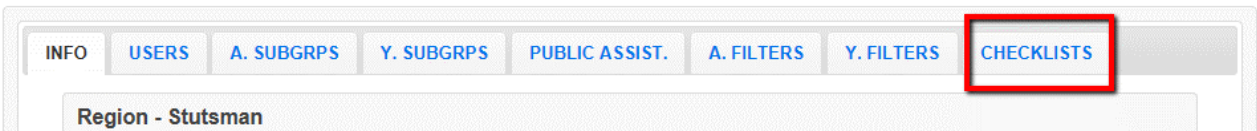
3. Click the **add icon** (⊕) next to the question set(s) you wish to add to that region. You will receive a message asking if you are sure you want to add the question set. Select **OK.**

Note: *To remove the question set(s) from a region, use the (⊖) icon.*

4. Repeat steps 1-3 to add a question set to other regions.

Note: *There is no save option on the **Regions** screen, once you click Ok, the change is saved.*

Note: *Question sets will be available to regions after this step. Regions must select the additional question set <u>before</u> creating a new checklist for a youth or they will not be available for entry. Select the appropriate institute checklist from the drop-down menu next to the grade level checklist to add the additional questions. If a youth already has a checklist entered that does not include the additional questions, there is no way to add the additional questions without re-entering the entire checklist.*

✚ Add Checklist   9th-12th   -- Institute Checklist-- ▼

Address Verification (EFNEP Only)

The address verification option standardizes and corrects address information and provides information on youth groups' county, congressional district, and Core Based Statistical Area (CBSA) - a geographic area defined by the Office of Management and Budget (OMB) based around an urban center of at least 10,000 people and adjacent areas that are socioeconomically tied to the urban center by commuting. These data are used to create filtered reports at the Institute level, and can be used to create Graphic Information Systems (GIS) maps in the future.

Note: *Verifying the address is OPTIONAL; if the user chooses not to verify address; it will not prevent the record from saving and moving on with data entry.*

Note: *Using the address verification function has no security concerns. The actual data the user enters into the system is not being transferred or stored anywhere. A data string is sent via a secure https: server (not a website) and is 'bounced' against a USPS dataset. This allows **WebNEERS** to instantly verify the address entered, as well as ensure standard and correct addresses are captured.*

Tip: Use GD or General Delivery for addresses that are not recognized. This will "force" the system to use only the zip code for verification and help with accuracy of reports by congressional district at the Institute level.

Note: *EFNEP users can capture information about the county FIPS code, Congressional District, CBSA (core based statistical area), Latitude and Longitude. These fields are not directly editable by the user. These fields can be populated automatically by: a) verifying the address after saving the form or b) using the batch address verification system. See below.*

The Process
The process for verifying addresses for youth groups can occur in two ways.

In a Youth Group Record

1. Select **Verify Address** on the **Contact Information** screen, after the youth group record has been saved. See **Adding Youth Groups** for more information on this topic.
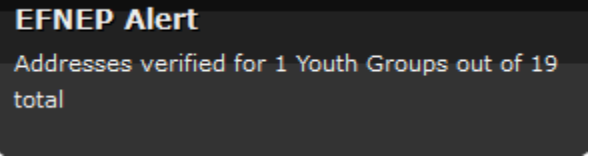
Note: *The Verify Address button is only available after the youth group record is saved.*

Address Verification

County | FIPS
Congressional ID | CBSA
Longitude | Latitude

Verify Address

Batch Verification

1. Select **Verify Addresses** from the *WebNEERS Home page*, under the *Youth Groups* section.
2. A popup message will appear in the upper-right hand corner of the screen indicating "*Address Verification In Process*".

At the conclusion of the verification process, which may take several minutes, a second popup message will appear providing a status on the verification process.

EFNEP Alert
Addresses verified for 1 Youth Groups out of 19 total

> Note: *If at any time during the process you close the "**Address Verification in Process**" window or select a new tab or link the process will stop. However, the process can be resumed later by completing the step above.*

Youth Group Reports

The youth group reports available through *WebNEERS* range from youth group diagnostic reports, see *Managing Checklists* section above, to Region level aggregated data, representing the demographics and output data, through Region/Institute level outcome data from summary reports are generated. The reports are a valuable resource to program managers/nutrition supervisors, as well as frontline staff for use with participants. WebNEERS reports are available as onscreen reports (via WebNEERS or saved as PDFs), printed reports, or as exports that include raw data.

> Tip: **Reporting Period** dates are automatically populated and used to pull all available data for the current reporting period into the report. It is only necessary to enter dates to view the data for a specific period of time within the reporting period.

Youth Group Mailing Labels

Youth Group Mailing Labels are available at the <u>Region level</u>. They can be printed and used to send additional materials, lessons or information to current or past youth groups. Addresses should never be shared or distributed to outside sources without prior written consent.

1. Select **Youth Mailing Labels** from the *WebNEERS Home page*, under the *Reports* section
2. Select the **Youth Group Filter** you want to use to generate the labels
3. Select the **Label Type** (Avery 5160 and 5164 are listed)
4. Select the **Print Direction**
   a. <u>Horizontal</u> - Adults are placed on labels first left to right and next top to bottom.
   b. <u>Vertical</u> - By selecting this option, adults will print first top to bottom and then left to right. This is useful when the labels being used are perforated in columns and the user would like to take advantage of them while still maintaining the labels in the correct order.
5. Select **Group Type**
   a. **Group Addresses** – this option creates a report for the addresses of the youth groups
   b. **Group Leaders** – this option creates a report for the staff member whose youth groups are selected in the Youth Group Filter
6. Select the **Sort**
   a. **Zip Code** - sorts by the zip code of the youth group in ascending numeric order
   b. **Name** - Sorts by the last name of the youth group in ascending alphabetic order
   c. Select the output of the report
      i. For PDF: Select **Print PDF**

Note: *The *.pdf is useful if the user wishes to print the labels directly from a file. If selected a browser window will open and the file will automatically begin to download.*

      ii. For Spreadsheet: Select **Save as Spreadsheet**

Note: *This option exports a *.csv file which can be opened with most standard database programs, for modification, or with most standard word processing software packages, for mail merges. If selected a browser window will open and the user will be asked to choose a destination for the file to be saved.*

Email List (CSV)

Email Lists are available at the Region level. The email list *.csv option exports a file which can be opened with most standard database, word processing, and spreadsheet programs, for modification and/or inclusion in email programs. This can be used to contact or follow-up with youth groups. Email addresses should never be shared or distributed to outside sources without prior written consent.

1. Select **Youth Group Email List (CSV)** from the ***WebNEERS Home page***, under the ***Reports*** section
2. Select the **Youth Group Filter** you want to use to generate the email list
3. If you want to run the report for specific dates, enter the **Reporting Period Begin Date** and **End Date**
   a. Type manually as MM/DD/YYYY or
   b. Select the Calendar Icon () and choose the correct date

 If no dates are selected, WebNEERS will pull all available data for the current reporting period. It is only necessary to enter dates if a specific subset of the data is needed.

4. Select **Submit** to run the email list or **Cancel** to exit without viewing it

 *This option generates an *.CSV file for the selected staff member. If this option is selected you need to select the **Wrench icon** () next to the name of the staff member you want to run the email list for.*

Group Detail Report

The Group Detail Report is available at the Region level. It provides the youth group data for a specific youth group. It is essentially a PDF version of what was entered.

1. Select **Group Detail Report** from the ***WebNEERS Home page***, under the ***Reports*** section
2. Select the **Print icon** (), under the Options column, to the left of the youth group you want to view.

Group Names by Leader

The Group Names by Leader Report is available at the Region level. It provides the names and IDs of the groups led by each staff person.

1. Select **Group Names by Leader** from the *WebNEERS Home page*, under the *Report* section
2. If you want to run the report for specific dates, enter the **Reporting Period Begin Date** and **End Date**
   a. Type manually as MM/DD/YYYY or
   b. Select the Calendar Icon (🗓️) and choose the correct date

Note: *If no dates are selected, WebNEERS will pull all available data for the current reporting period. It is only necessary to enter dates if a specific subset of the data is needed.*

3. **Select Staff**
   a. For a single staff person: choose the name of the staff from the list
   b. For all staff: leave the selection –All Staff—

Note: *This selection will provide information on all available staff who have data available for this report.*

4. Select **Submit** to view the report available for the selected staff member(s) or **Cancel** to exit without viewing it
5. To print the report, select the **Print** button at the top of the screen.

Group List

The Group List Report is available at the Region level. It provides a list of the Youth Groups, the group addresses/phone numbers, and the leaders of the groups for a given region.

1. Select **Group List** from the *WebNEERS Home page*, under the *Reports* section
2. Select **Sort By**
   a. **By ID** – Sorts by youth group in ascending order
   b. **By Name** – Sorts by youth group name in ascending order
3. Select **Submit** to review the list or **Cancel** to exit without viewing it
4. To print the report, select the **Print** button at the top of the screen

The Youth Group Leader Summary Report is available at the Region level. It provides a summary of the groups reached by each staff person as well as the total number of groups, youth, lessons, sessions, and hours per staff person.

1. Select **Group Leader Summary** from the *WebNEERS Home page*, under the *Reports* section
2. If you want to run the report for specific dates, enter the **Reporting Period Begin Date** and **End Date**
   a. Type manually as MM/DD/YYYY or
   b. Select the Calendar Icon (📅) and choose the correct date

Note: *If no dates are selected, WebNEERS will pull all available data for the current reporting period. It is only necessary to enter dates if a specific subset of the data is needed.*

3. Select the **Staff**
   a. For a single staff person: choose the name of the staff from the list
   b. For all staff: leave the selection –All Staff—
4. Select **Submit** to review the summary or **Cancel** to exit without viewing it
5. To print the report, select the **Print** button at the top of the screen.

The Youth Checklist Review Report is available at the Region level. It allows a user to quickly compare entry and exit values for questions (core or additional) as well as to see if entry or exit data is missing for youth group members.

1. Select **Youth Checklist Review** from the *WebNEERS Home page*, under the *Reports* section
2. Enter the **Youth Selection**
   a. **Entire Unit** – generate the report for the entire unit
   b. **Staff** – generate the report for each staff member
3. Enter the **Questions Selection**
   a. **Core Questions** - This will report only on the federal checklists for each youth group
   b. **Additional Questions** - This will report only on the additional checklists selected for each youth group
6. **Privacy** - Check this box to leave out the youth identifiers in this report

7. Select **Submit** to review the report or **Cancel** to exit without viewing it

> **Note:** *If Youth Selection was **Entire Unit**, the user will be directed to the checklist review report.*

> **Note:** *If Youth Selection was **Staff,** the user will need to select the Magnifying Glass (Preview) icon to the left of the staff member on whom they want to view the report.*

8. To print the report, select the **Print** button, at the top of the screen

Youth Summary

The Youth Summary Report is available at the Region and the Institute levels. It provides the aggregated demographic data on all youth groups.

Region Level

1. Select **Youth Summary** from the *WebNEERS Home page*, under the *Reports* section
2. Select the **Youth Group Filter** you want to use to generate the report
3. If you want to run the report for specific dates, enter the **Reporting Period Begin Date** and **End Date**
   a. Type manually as MM/DD/YYYY or
   b. select the Calendar Icon (📅) and choose the correct date

> **Note:** *If no dates are selected, WebNEERS will pull all available data for the current reporting period. It is only necessary to enter dates if a specific subset of the data is needed.*

4. Select **Submit** to view the report or **Cancel** to exit without viewing it
5. To print the report, select the **Print** button, at the top of the screen.

Institute Level

1. Select **Youth Summary** from the *WebNEERS Home page*, under the *Summary Reports* section
2. Select the **Filter** on which the report should be generated
3. Select the **Region(s)** to be included in the report. To view all regions together, select "*Select All*"

> **Note:** *A region selection is required.*

4. If desired, select the **Congressional Districts, Core Based Statistical Areas (CBSA)** and/or **Counties** to be included

> *Note:* *Congressional Districts, CBSAs and Counties are only available if addresses of the youth groups were verified by the <u>Region level</u> users. If you wish to include all data (including those records without a valid or a verified address) leave this section blank or select the 'All Congressional Districts', 'All CBSAs' and/or 'All Counties.' Otherwise, use the checkboxes to select the specific information you want to include in your report under each of these sections. Please note, the County is based on the address entered in WebNEERS. This may be different than the 'region' you setup. They may not be mutually exclusive.*

> *Tip:* Selecting Congressional Districts, CBSAs and Counties along with regions affects report results. They form "AND" statements - must be in X AND Y to show up in the report. So, for example, If you select a County and a Congressional District along with your regions, adults will only show up in the report if their addresses are verified, they are in one of the regions selected, AND they are in the Congressional District AND the CBSA.

5. If you want to run the report for specific dates, enter the **Reporting Period Begin Date** and **End Date**
   a. Type manually as MM/DD/YYYY or
   b. select the Calendar Icon (📅) and choose the correct date

> *Note:* *If no dates are selected, WebNEERS will pull all available data for the current reporting period. It is only necessary to enter dates if a specific subset of the data is needed.*

6. Select **Submit** to view the report or **Cancel** to exit without viewing it
7. To print the report, select the **Print** button at the top of the screen.

Youth Checklist Summary

The Youth Checklist Summary Report is available at the <u>Region</u> and the <u>Institute levels</u>. It provides the aggregated data from the youth checklists.

Region Level

1. Select **Youth Checklist Summary** from the *WebNEERS Home page*, under the *Reports* section
2. Select the **Youth Filter** you want to use to generate the report

3. If you want to run the report for specific dates, enter the **Reporting Period Begin Date** and **End Date**
   a. Type manually as MM/DD/YYYY or
   b. select the **Calendar Icon** (📅) and choose the correct date

> **Note:** *If no dates are selected, WebNEERS will pull all available data for the current reporting period. It is only necessary to enter dates if a specific subset of the data is needed.*

4. Select **Submit** to view the report or **Cancel** to exit without viewing it
5. To print the report, select the **Print** button, at the top of the screen.

Institute Level

1. Select **Youth Checklist Summary** from the *WebNEERS Home page*, under the *Summary Reports* section
2. Select the **Filter** on which the report should be generated
3. Select the **Region(s)** to be included in the report. To view all reports together, select "**Select All**"

> **Note:** *A region selection is required.*

4. If desired, select the **Congressional Districts, Core Based Statistical Areas (CBSA)** and/or **Counties** to be included

> **Note:** *Congressional Districts, CBSAs and Counties are only available if addresses of the youth groups were verified by the Region level users. If you wish to include all data (including those records without a valid or a verified address) leave this section blank or select the 'All Congressional Districts', 'All CBSAs' and/or 'All Counties.' Otherwise, use the checkboxes to select the specific information you want to include in your report under each of these sections. Please note, the County is based on the address entered in WebNEERS. This may be different than the 'region' you setup. They may not be mutually exclusive.*

> **Tip:** Selecting Congressional Districts, CBSAs and Counties along with regions affects report results. They form "AND" statements - must be in X AND Y to show up in the report. So, for example, If you select a County and a Congressional District along with your regions, adults will only show up in the report if their addresses are verified, they are in one of the regions selected, AND they are in the Congressional District AND the CBSA.

5. If you want to run the report for specific dates, enter the **Reporting Period Begin Date** and **End Date**
   a. Type manually as MM/DD/YYYY or
   b. select the Calendar Icon ( ) and choose the correct date

If no dates are selected, WebNEERS will pull all available data for the current reporting period. It is only necessary to enter dates if a specific subset of the data is needed.

6. Select **Submit** to view the report or **Cancel** to exit without viewing it
7. To print the report, select the **Print** button at the top of the screen.

Subgroups List

The Subgroup List is available at the Region and Institute levels. It can be used to view the list of Federal, Institute and Region Youth subgroups available to that user.

Region level subgroups can only be viewed by Region level users

Region Level

1. Select **Subgroup List** from the *WebNEERS Home page*, under the *Reports* section
2. Review the list on the screen or print by selecting the **PDF** button at the top of the screen

Institute Level

1. Select **Youth Subgroup List** from the *WebNEERS Home page*, under the *Setup - Reports* section
2. Review the list on the screen or print by selecting the **PDF** button at the top of the screen

Filter List

The Filter List is available at the Region and Institute levels. It can be used to view the list of Federal, Institute and Region Youth filters available to that user.

Region level filters can only be viewed by Region level users

Region Level

1. Select **Filter List** from the ***WebNEERS Home page***, under the ***Reports*** section
2. Review the list on the screen or print by selecting the **PDF** button at the top of the screen

Institute Level

1. Select **Youth Filter List** from the ***WebNEERS Home page***, under the ***Setup - Reports*** section
2. Review the list on the screen or print by selecting the **PDF** button at the top of the screen

Browse Youth Data

Browse Youth Summary – Institute Level

The Browse Youth Summary screen provides a snapshot of the number of youth in WebNEERS that fit within each of the Federal and Institute level filters, by region. This is a quick way to see in real time if data entry is complete. Use the search box on the top to quickly narrow results by filter or by region.

1. Select **Browse Youth Summary** from the ***WebNEERS Home page***, under the ***Browse*** section
2. The data will be displayed on the screen.

Browse Youth Checklist Summary – Institute Level

The Browse Youth Checklist Summary screen provides a snapshot of the number of youth with entry and exit checklists in WebNEERS that fit within each of the Federal and Institute level filters, by region. This is a quick way to see in real time if data entry is complete. Use the search box on the top to quickly narrow results by filter or by region.

1. Select **Browse Youth Checklist Summary** from the ***WebNEERS Home page***, under the ***Browse*** section
2. The data will be displayed on the screen.

Section 7: End of Year Processes & Starting New Reporting Period

Verify Accuracy and Completeness of Data (EFNEP & SNAP-Ed)

At the end of the year, it is important to review your data prior to submission (EFNEP only) or prior to setting up your regions in the new year (EFNEP & SNAP-Ed). This will ensure that data is accurate and complete and that errors do not carry forward into the new year. Steps for <u>Region</u> and <u>Institute Level</u> users are outlined below.

Steps for <u>Region Level</u> Users

1. Log in as a <u>Region Level</u> user
2. Confirm that all data is entered, accurate, and complete
3. If a Staff member left mid-year – prior to exiting some of his/her adults and youth groups, make sure to terminate them.

Note: *If the adults or youth groups of the staff person who left mid-year were transferred to another staff member, you can skip this step!*

4. Delete any outdated volunteers from the system.
5. Correct Adult, Youth Group, and Staff Errors.

View Adult Errors

a. If there are adults listed, complete steps 'b' through 'e'. <u>If not, skip View Youth Errors</u>.
b. Review the error type
c. Click the "🔧" icon to open the adult record
d. Fix the issue(s)
e. Click "**Save**" to save the changes you made or "**Cancel**" to exit the record without saving
f. Repeat steps 'b' through 'e' for all adults on the Adult Errors page

View Youth Errors

a. If there are youth groups listed, complete steps 'b' through 'e'. If not, <u>skip to View Staff Errors</u>.
b. Review the error type
c. Click the "🔧" icon to open the youth group record
d. Fix the issue(s)
e. Click "**Save**" to save the changes you made or "**Cancel**" to exit the record without saving
f. Repeat steps 'b' through 'e' for all youth groups on the Youth Errors page

View Staff Errors

a. If there are staff listed, complete steps 'b' through 'e'. If not, skip to step #4.
b. Review the error type
c. Click the "" icon to open the adult record
d. Fix the issue(s)
e. Click "**Save**" to save the changes you made or "**Cancel**" to exit the record without saving
f. Repeat steps 'b' through 'e' for all staff on the Staff Errors page

Note: *All relevant Adult, Youth, and Staff errors should be fixed; any listed that are not actually errors can be skipped. Having errors listed on the View Adult/Youth/Staff Errors pages will not prevent you from submitting your data (EFNEP only) or prevent you from setting up your regions in the new reporting year (EFNEP & SNAP-Ed).*

SNAP-Ed: *For example, a SNAP-Ed user may get an error that a person is marked as graduated without an entry and exit recall, but that may not be a requirement for SNAP-Ed.*

6. Complete any additional steps as required by your Institute
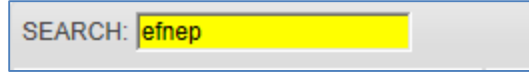
Steps for Institute Level Users

1. Work with Region Level users to make sure the **Steps for Region Level Users** are complete
2. Log in as an Institute Level user
   a. Click on "**Browse Adult Summary**"

b. Type EFNEP (or SNAP-Ed) in the search box to filter the results by program

SEARCH: efnep

c. Confirm that the "**# of Adults**" for each region look accurate
d. Return to the **Home Screen**

3. Click on "**Browse Adult Diet Summary**"
   - Repeat steps 'a' through 'd' (above)
   - For step 'c', confirm "**# of Adults with Entry & Exit Recalls**" look accurate

4. Click on "**Browse Adult Checklist Summary**"
   - Repeat steps 'a' through 'd' (above)
   - For step 'c', confirm "**# of Adults with Entry & Exit Checklists**" look accurate

5. Click on "**Browse Youth Summary**"
   - Repeat steps 'a' through 'd' (above)
   - For step 'c', confirm "**# of Youth**" look accurate

6. Click on "**Browse Youth Checklist Summary**"
   - Repeat steps 'a' through 'd' (above)
   - For step 'c', confirm "**# of Youth with Entry & Exit Checklists**" look accurate

7. Click on "**Browse Staff Summary**"
   - Repeat steps 'a' through 'd' (above)
   - For step 'c', confirm "**# of Professionals**", "**# of Paraprofessionals**", "**# of Volunteers**" look accurate

Data Submission (EFNEP Only)

This section is for EFNEP users only. SNAP-Ed data is submitted to the Food and Nutrition Service (FNS), not NIFA and thus SNAP-Ed users can skip this section. They should follow FNS' protocol for end of year data submission.

Deadline

Each year, EFNEP data must be submitted to the National Institute of Food and Agriculture (NIFA) via WebNEERS on or before **November 1st.** This is done by Institute Level users.

Submit Data

The steps below explain how to submit your institution's EFNEP data to the Federal Office. The Federal Office cannot access your data until you complete these steps. Please make sure Region and Institute Level users verify the accuracy and completeness of data prior to submission.
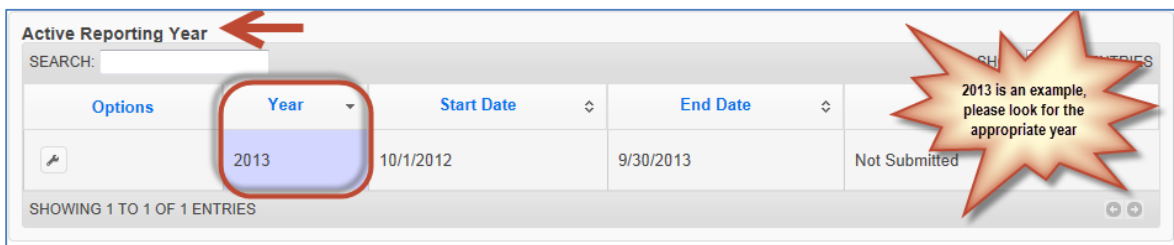
Data submission sends forward adult, youth group, and staff data (minus personally identifiable information), not the Annual Update or the Budget/Budget Justification. The submission process for those items is completely separate. ***See Section 8 - Annual Update and 5-Year Plan*** and ***Section 9 – Budget and Budget Justification***.
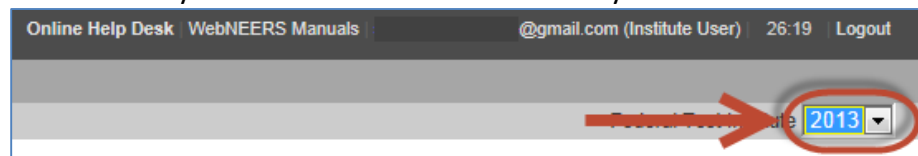
Note: *In the Nutrition Education Evaluation and Reporting System version 5 (NEERS5), our previous system, there was a complicated import/export process for data submission. This process is no longer necessary. In WebNEERS, regional data is always visible at the Institute Level and even though the Institution still has to submit its data to the Federal Level the process is much easier!*

1. Log in as an Institute Level user
2. Click on "**Manage Reporting Years**"
3. At the top, under **Active Reporting Year**, confirm that the year you wish to submit is listed in the "**Year**" column

- If not, use the year dropdown next to the name of your university (on the top right of your screen) to select the appropriate year and click "**OK**" to confirm that you want to switch to a different year

Note: *The screenshots above show "2013" as an example. However, you should select the year you are required to submit. If you are unsure which year to submit, contact the help desk*

4. Click the "🔧" icon to open the Active Reporting Year

5. Click on the "**DATA SUBMISSION**" tab

6. Click the "**Submit for Federal Review**" button

 *If you see a message on the "**DATA SUBMISSION**" that that says, 'You must make this reporting year active in order to submit it', click the "**Cancel**" button to return to the **Manage Reporting Years** screen and follow the steps above to make the year you want to submit active*

7. Click "**OK**" to submit the data or "**Cancel**" to cancel the submission

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Successful Submission

- If your submission was successful, you will get an EFNEP Alert indicating that your reporting year was submitted, you will be returned to the Manage Reporting Years screen and the "**Status**" column will say "**Pending Review**".
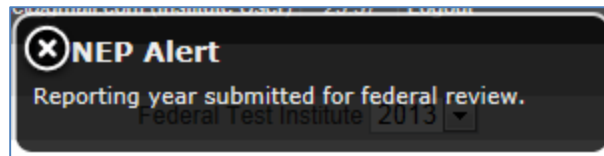
At this point, regional data for the year you submitted is locked. Region Level users can still run reports and add/edit subgroups, filters, public assistance programs, and defaults, but they cannot add/edit adults, youth groups, or staff.

Adults, youth groups, and staff in the reporting year you submitted will only be unlocked if:
a) the data submission is cancelled
b) the data is marked as "Needs Revision" by the Federal Level user

Adults, youth groups, and staff in the new reporting year (new ones or those that are carried forward) cannot be added or edited until the region has been setup for the new reporting year.

*Region Level users may still be able to add/edit the **Delivery Sites/Partnerships** chart and **Program Impacts** because those are part of the Annual Update section which is completely separate from the adult, youth group, and staff data in terms of submission/migration.*

Failed Submission

- If your submission failed, you will get a red alert message on the top right of your screen. If this happens, click on the " " icon and try again. If you continue to receive errors, contact the help desk.

Cancel Data Submission

If your data submission has a status of "**Pending Review**", you can cancel the submission. This may be useful if you submit and then find an error that needs to be corrected.

1. Log in as an Institute Level user
2. Click on "**Manage Reporting Years**"
3. Under **Active Reporting Year**, confirm that the year you wish to cancel your data submission for is listed in the "**Year**" column and that your status is "**Pending Review**"
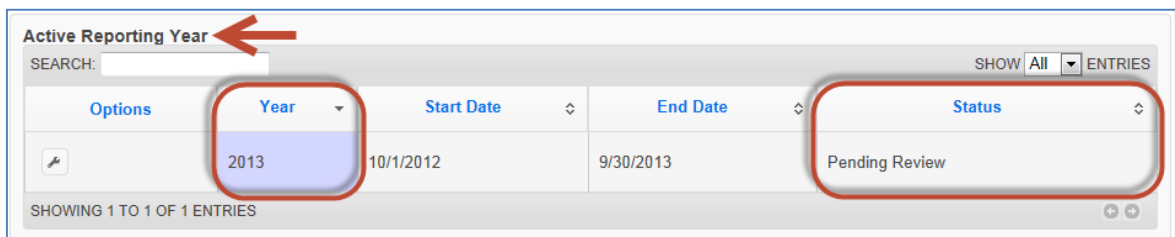
- If the wrong year is active, use the year dropdown next to the name of your university (on the very top right of your screen) to select the appropriate year and click "**OK**" to confirm that you want to switch to a different year
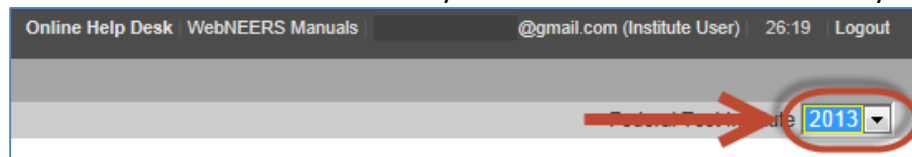
*The screenshots above show "**2013**" as an example. However, you should select the year you want to cancel the submission for.*

4. Click the " " icon to open the Active Reporting Year
5. Click on the "**DATA SUBMISSION**" tab

6. Click the "**Cancel Submission**" button to cancel the submission
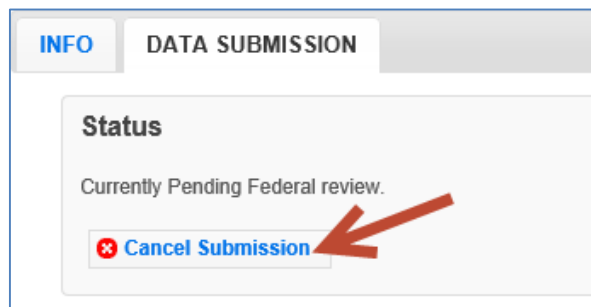
 *The **Cancel Submission** button will only be visible if the plan is still "**Pending**"; you cannot cancel a submission if the status is "**Under Review**", "**Needs Revision**" or "**Approved**".*

7. Click "**OK**" to confirm that you want to cancel the submission
8. Watch for an alert message at the top right confirming that it was successful
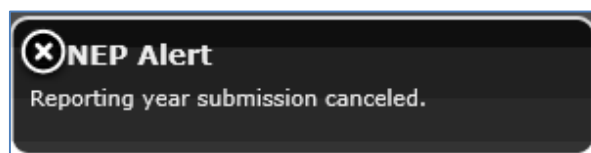
At this point, regional adult, youth group, and staff data is unlocked and <u>Region Level</u> users can make edits, as needed

9. When all updates are complete, follow the steps in the ***Submit Data*** section to resubmit your data.

Submission Status

After you submit your data to the Federal Office, the status will be marked as one of the following:

- **Pending Review**: This status indicates that you have submitted your data, but the Federal Office has not reviewed it. Data submission can still be cancelled at this point.

- **Under Review**: This status indicates that the Federal Office has done an initial review of your data and has given you permission to Start the New Reporting Period. They will or are in the process of a more thorough review
- **Needs Revision**: This status indicates that the Federal Office has reviewed your data and discovered one or more issues. Your data needs to be revised and resubmitted.
- **Approved**: This status indicates that the Federal Office has reviewed your data and has approved it. No further action is needed.

Revise/Resubmit Data

If your data submission is marked as "Needs Revision", you need to determine the issue(s), have your Region Level users make revisions, and resubmit the revised data. Instructions are below.

Note: *As soon as the Federal Level user marks your data as "**Needs Revision**", the Region Level data entry screens for that year are unlocked. This allows the Region Level users to add/edit adults, youth groups, and staff, as needed.*

Determine the Issue(s)

1. Log in as an Institute Level user
2. Click on "**Manage Reporting Years**"
3. Click the "✎" icon to open the Reporting Year that is marked as "Needs Revision"

Note: *The reporting year that "Needs Revision" may be in the **Active Reporting Year** or the **Non-Active Reporting Years** section*

4. Click on the "**COMMENTS**" tab to determine why your data was marked as "Needs Revision"

Note: *If any of the revision requests are unclear, contact the help desk.*

Make Revisions at <u>*Region Level*</u>

After you determine the issues, you need to work with your <u>Region Level</u> users to make revisions. These are the steps they need to complete.

1. Log in as a <u>Region Level</u> user
2. At the top, confirm that the correct region is selected
   - If not, use the region dropdown to select the appropriate region
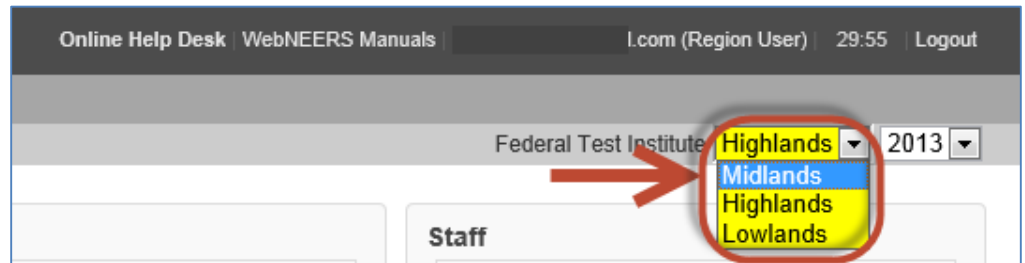
3. At the top, confirm that the previous reporting year is selected
   - If not, use the year dropdown to select the appropriate year and click "**OK**" to confirm that you want to switch to a different year
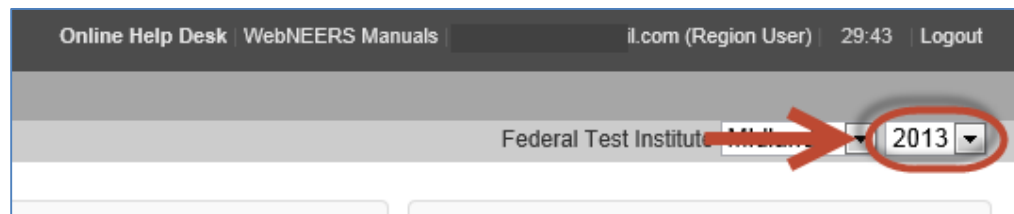
Note: *This screenshots show "2013" as an example. However, you should select the year you are required to revise.*

4. Make revisions to adults, youth groups, and/or staff, as needed
5. When you are done making revisions, notify the <u>Institute Level</u> user
6. If you changed the year to make revisions, make sure you use the year dropdown to return to the appropriate year before entering additional data
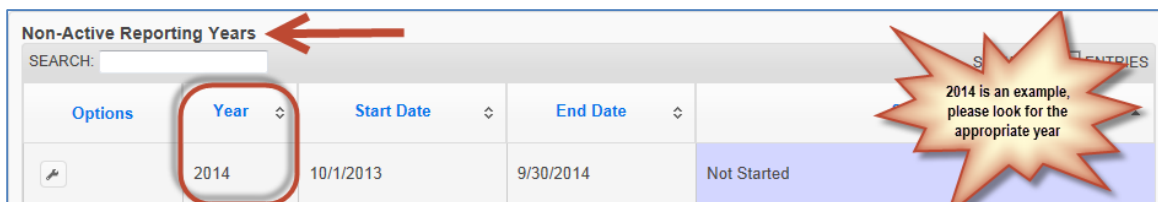
Resubmit the Revised Data

1. Log in as an <u>Institute Level</u> user
2. Follow the steps listed in the Submit Data section above to resubmit the revised data.

Start a New Reporting Period (EFNEP & SNAP-Ed)

The Start a New Reporting Period process allows the <u>Institute Level</u> users to create a new year and to give their regions the ability to move into the new year/migrate their data forward. This is a multi-step process and it is important to note that completing the steps at the <u>Institute Level</u> does not setup the regions for the new year. The <u>Region Level</u> users must complete the steps outlined in the ***Setup Regions in New Reporting Year*** section to setup their new year and to migrate their data forward.

1. Log in as an <u>Institute Level</u> user
2. Click on "**Manage Reporting Years**"
3. At the bottom, under **Non-Active Reporting Years**, confirm that the year you wish to start is listed in the "**Year**" column

EFNEP users:
- The new reporting year will not be visible until the <u>Federal Level</u> user has done an initial review of your data for accuracy and completeness. This will typically occur within 2 weeks of submission. If the new reporting year is not visible by November 20th, contact the help desk for assistance.

SNAP-Ed users:
- The new reporting year will be granted around the same time as the EFNEP system. If the new reporting year is not visible by November 20th, contact the help desk for assistance.

4. Click the " " icon to open the Non-Active Reporting Year you wish to start
5. Click on the "**CREATE NEW REPORTING YEAR**" tab
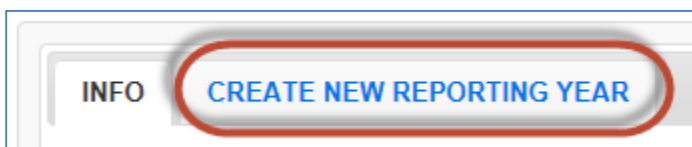
6. The **CREATE NEW REPORTING YEAR** tab will show a list of your Institute's current regions. For the new reporting year, if you want to include:
   - All existing regions, click "**Select All**", to automatically check the box for every region
   - Some existing regions, check the boxes next to the regions you want to move forward; leave those you don't want to move forward unchecked
   - None of the existing regions, i.e., you want to start from scratch, leave all boxes unchecked

Tip: *The 'some' and the 'none' option can be used to prevent regions from moving forward until you are ready for them to do so.*

7. Confirm that selections are correct and click "**Begin Reporting Year**"

INFO	CREATE NEW REPORTING YEAR

Select Regions that can move to new reporting year

Note: By selecting a region you are allowing your users to begin entering new data into this region as well as allowing them to migrate their old data.

☐ Select All
☑ Highlands (2013 → 2014)
☑ Lowlands (2013 → 2014)
☑ Midlands (2013 → 2014)

Add Reporting Year to Institute:

Note: This process may take a few minutes to complete.

[Begin Reporting Year]

Note: *If you omit a region that needs to move forward, you can add it later, but if you include a region by mistake, you will not be able to remove it using this process*

8. You will get an alert message that the reporting period was successfully started and the "**DATA SUBMISSION**" tab will appear

⊗ NEP Alert
Reporting Year Successfully Created

INFO	CREATE NEW REPORTING YEAR	DATA SUBMISSION
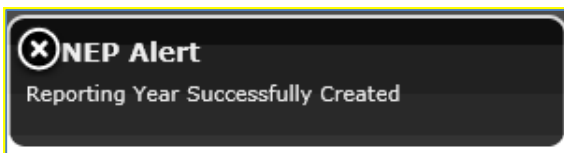
9. If you need to add additional regions complete the following. If not, skip to step #10.
   - Click on the "**CREATE NEW REPORTING YEAR**" tab
   - Check the box for the region(s) you want to add
   - Click the "**Add Selected Regions**" button

Note: *You can only add additional regions if the Reporting Year is in the "**Non-Active**" section of the **Manage Reporting Years** screen. If you click on the "**CREATE NEW REPORTING YEAR**" tab and see a message that says 'In order to migrate regions into this reporting year, you will need attach your user to the XXXX reporting year and return to this screen', use the year dropdown on the top right of the screen to select the year listed in the message. This will allow you to complete step #9 by making the year you need to make changes to "**Non-Active**".*

10. Click the "**Make Active Reporting Year**" button to move the Institute Level user into the new reporting year
11. Click "**OK**" to confirm that you want to switch to a different year
12. Confirm that the new reporting year is listed as the "**Active Reporting Year**" on the **Manage Reporting Year** screen
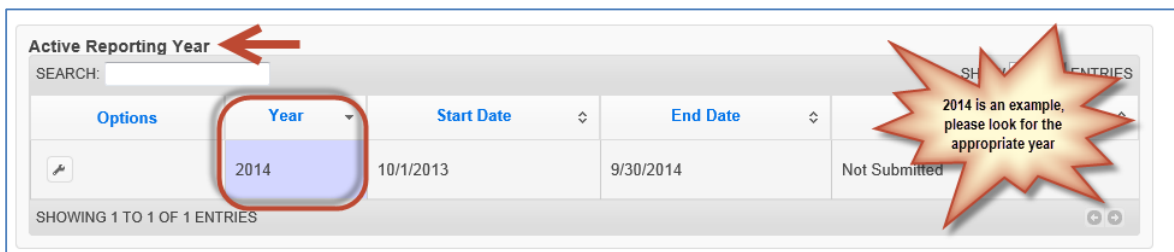

Note: *Institute Level and Region Level users do not have to be attached to the same year at the same time. The system is set up to accommodate users being attached to different years. Users can also move back and forth between years at any time*

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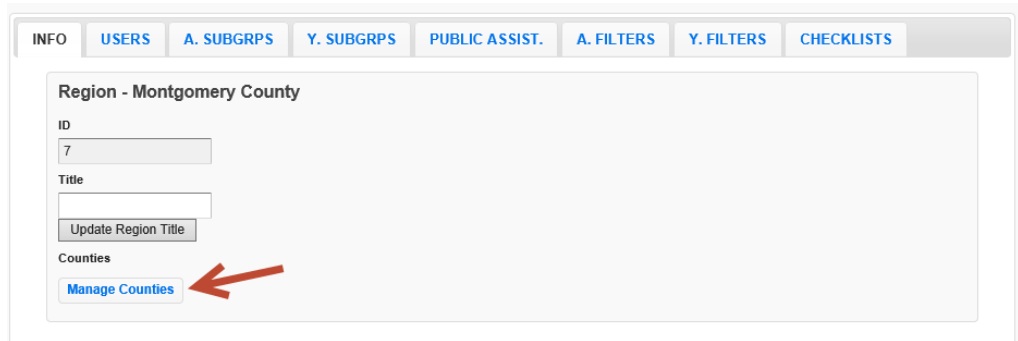
13. If needed, **Add New Regions**

Note: *If you need to edit a region, click "**Manage Regions**" and the click the wrench icon next to the region you need to edit. Any edits you make will be saved in real time. There is no save option in the Manage Regions section.*

Add New Region(s)

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   i. Click **Add Region**
   ii. Enter **Region Name**
   iii. Click "**Add**"

iv. Click "**Manage Counties**" to select counties from your sate/territory to include in the new Region

v. Check the box in the **Selection** column to select the appropriate county or counties
vi. Click **OK** to save the selections or **Cancel** to exit without saving
vii. Use the other tabs to customize the region as needed. See *Section 3: Setup – Customizing WebNEERS to Meet Local Needs* for details.

14. If needed, customize options for the upcoming year

Update Subgroups, Filters or Public Assistance Programs

See *Section 3: Setup - Customizing WebNEERS to Meet Local Needs*

Update Additional Checklist Question Sets

See *Section 5: Manage Adults* for adult question sets
See *Section 6: Manage Youth* for youth question sets

Give Region Level Users Permission to Migrate Data

Once your new reporting year is setup, you need to give Region Level users permission to migrate data. Only Region Level users with permission #150, "Migrate Region Data", have the ability to migrate data from one year to the next. This allows you to control who can complete this process. Please follow the steps below to give permission #150 to the Region Level users you want to be able to migrate data.

Note: **DATA MIGRATION** *is the process WebNEERS completes when it reviews your existing database, removes those records that are only part of the previous year, and moves those records that are part of the new year into the new reporting year's database.*

1. Log in as an <u>Institute Level</u> user
2. Click on **View Users**
3. Click the "⚒" icon for the <u>Region Level</u> user to whom you want to give the "**Migrate Regional Data**" permission
   a. Search for permission #150 and check the box to grant the user that permission
   b. Scroll to the bottom and click save
4. Repeat step #3 for all <u>Region Level</u> users you want to give permission to migrate regional data

Setup Region(s) in the New Reporting Year (EFNEP & SNAP-Ed)

After the <u>Institute Level</u> successfully starts the new reporting year, he/she should work with <u>Region Level</u> users to setup their regions. This is multi-step process only needs to be completed once per year per region. This means only one user per region needs to complete the steps below each year.

Part I: Migrate Data

Data Migration is the process WebNEERS completes when it reviews your existing database, removes those records that are only part of the previous year, and moves those records that are part of the new year into the new reporting year's database. *So, for example, if you created the FY2014 database, the migration process would remove those adults and youth groups that exited the program on or before 09/30/2013 and it would carry forward those who entered the program or who exited the program 10/01/2013 or later.*

The following data migrate forward:
- <u>Adults</u> who are part of the new year, including their recall and checklist data
- <u>Youth groups</u> which are part of the new year, including their checklist data
- <u>Region Level</u> subgroups, filters, public assistance programs, and defaults

Existing staff and volunteers as well as <u>Institute Level</u> subgroups, filters, public assistance programs, and additional checklist question sets are available to the region as soon as the <u>Institute Level</u> user completes the steps to include the region as part of the new reporting year. This means <u>Region Level</u> users can access certain items whether they complete the steps for migration or not.

*You can skip **Part I** if you do not wish to bring any regional data (adults, youth groups, subgroups, filters, public assistance programs, defaults) forward from the previous year or if an <u>Institute Level</u> user has asked you to wait to migrate your data until the previous year's data has been approved by the Federal Office (EFNEP only).*

1. Log in as a <u>Region Level</u> user
2. At the top, confirm that the correct region is selected
   - If not, use the region dropdown to select the appropriate region
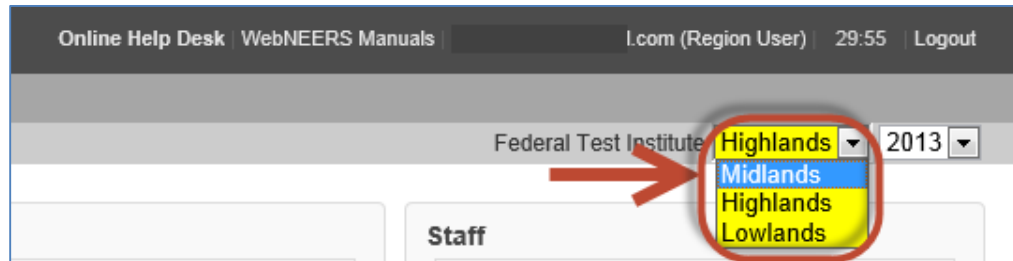
3. At the top, confirm that the previous reporting year is selected
   - If not, use the year dropdown to select the appropriate year and click "**OK**" to confirm that you want to switch to a different year
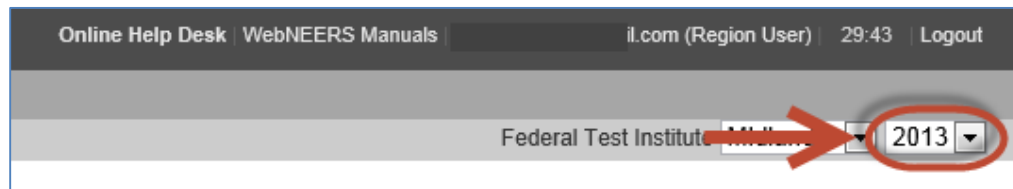
 *This screenshot shows "**2013**" as an example. However, you should select the year you just completed*

4. On the home screen, under "**Data Management**" click the "**Migrate Data**" button. If the "**Migrate Data**" button is grayed out, you do not have permission to migrate data. Notify your Institute Level contact and ask him/her to give you permission to migrate

5. In the dropdown under "**Data Migration**" select the year you want to migrate your previous year's data into
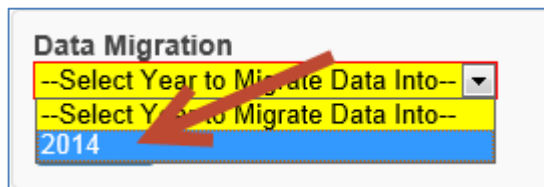
 *This screenshot shows "**2014**" as an example. However, you should select the new reporting year. If you are unsure what it is, ask your <u>Institute Level</u> contact.*

   - If the screen says "There are no reporting years that you can migrate this region data into at this time" or if the year isn't listed in the dropdown, notify

your <u>Institute Level</u> contact and ask him/her to give you permission to move into the new year.

- If the year is listed, but it says "**Already Migrated**" the migration for this region has already been completed, skip to **Part II**

Note: *data migration can only be completed once per region*

6. Click on the "**Migrate**" button

*The migration process can only be completed once. Therefore, **it is important to make sure your previous year's data is accurate and complete before confirming the migration**.*

7. Click "**OK**" to start the migration or "**Cancel**" to cancel it
8. After the Migration is complete, you will see a **Migration Report**.
9. If any items were unsuccessful, notify the <u>help-desk</u>. In your message, be specific about which region had migration errors and what the migration errors were.
10. At the bottom of the screen, click the "**Return to Home Screen**" button
11. To migrate additional regions, repeat steps #2 through #9. Make sure you do this before moving on to **Part II**

Part II: Move into the New Reporting Year

1. From the home screen, use the year dropdown at the top to select the new year
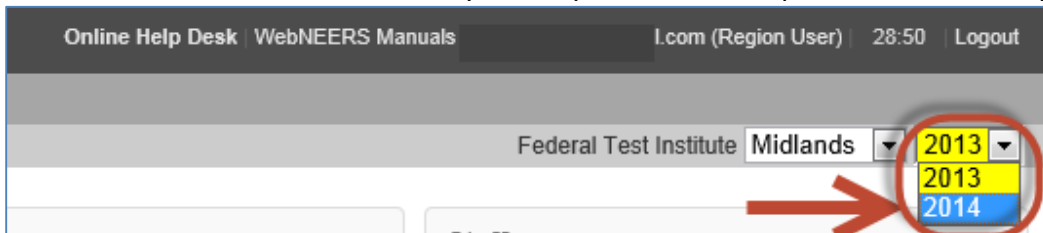
*This screenshot shows "**2014**" as an example. However, you should select the year you want to move into.*

1. Click "**OK**" to confirm that you want to switch to a different year

*If you get a message that the region you selected is not part of the new year, click "**OK**" or "**Cancel**" to continue and then notify your <u>Institute Level</u> contact and request permission to move into the new year*

2. If you migrated your data in **Part I**:
    a. Click on "**Manage Adults**" and confirm that your adult data transferred properly. *If not, make a note of what is wrong with your data and notify your Institute Level contact. He or she can contact the* help-desk*, if needed.*
    b. Click on "**Manage Youth Groups**" and confirm that your youth group data transferred properly. *If not, make a note of what is wrong with your data and notify your Institute Level contact. He or she can contact the* help-desk*, if needed.*
    c. Click on "**Manage Staff**" and delete any staff and volunteers who are no longer part of the program.

> **Note:** *A staff person cannot be deleted if he/she has any adults, youth groups or volunteers associated with him/her. Use the transfer responsibilities option to quickly transfer adults, youth group and volunteers of a staff person who left to an active staff member (see **Section 4: Managing Staff** for details.)*

> **Note:** *If you did not migrate your data, you can do so later by following the process above in **Part I** to combine any newly entered data with data that migrates forward.*

New Reporting Period Information

At this point, the region setup for the new reporting year is complete.

1. Region Level users can add:
    - new adults
    - new youth groups
    - new staff
2. Region Level users can edit:
    - migrated adults
    - migrated youth groups
    - migrated staff.

> **Note:** *Instructions on the regional system, are available in **Section 4: Managing Staff, Section 5: Managing Adults**, and **Section 6: Managing Youth**.*

3. Region Level subgroups, filters, public assistance programs, and defaults from the previous year should be available for use as well as any Institute Level subgroups, filters, public assistance programs, and additional checklist question sets.
4. The **Delivery Sites/Partnerships** chart will be zeroed out
5. The **Program Impacts** from the previous year will be removed.

Access Previous Year Data and Reports

At any point, <u>Institute Level</u> and <u>Region Level</u> users can return to a previous year to download their data export files or to view/print reports. Instructions are below.

Note: *<u>Institute Level</u> and <u>Region Level</u> users do not have to be attached to the same year at the same time. The system is set up to accommodate users being attached to different years. Users can also move back and forth between years at any time.*

Steps for Region Level Users

1. Log in as a <u>Region Level</u> user
2. If needed, use the region dropdown to select the appropriate region
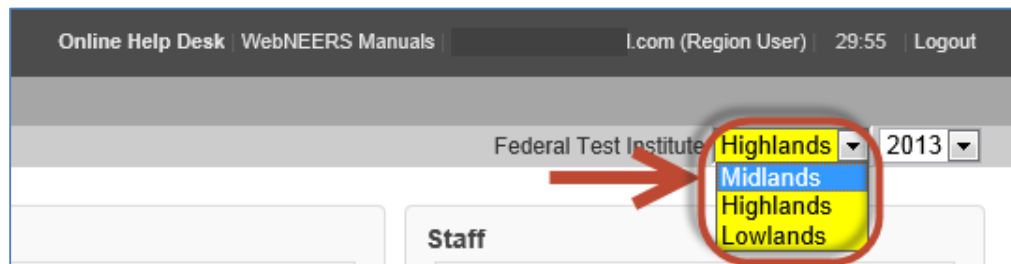
3. Use the year dropdown next to the name of your university (on the top right of your screen) to select the appropriate year and click "**OK**" to confirm that you want to switch to that year
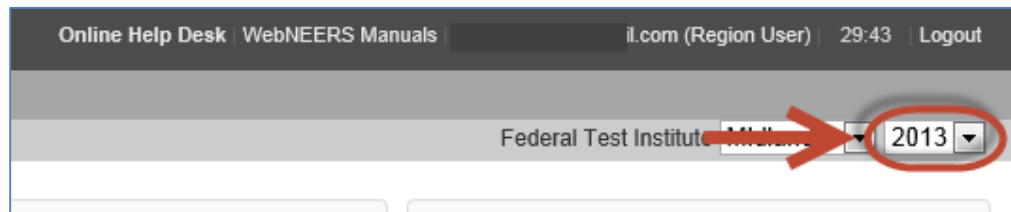
Note: *The screenshots above show "2013" as an example. However, you can select any year you wish to return to.*

4. Download data export files or view/print reports, as needed
5. Use the year dropdown next to the name of your university (on the top right of your screen) to return to the current year to ensure that new data is entered into the correct database

SNAP-Ed: *SNAP-Ed data is not submitted so previous year data is not locked. Therefore it is really important to make sure step #5 is completed, otherwise <u>Region Level</u> users run the risk of entering data into the incorrect database.*

Steps for Institute Level Users

1. Log in as an <u>Institute Level</u> user
2. Use the year dropdown next to the name of your university (on the top right of your screen) to select the appropriate year and click "**OK**" to confirm that you want to switch to that year
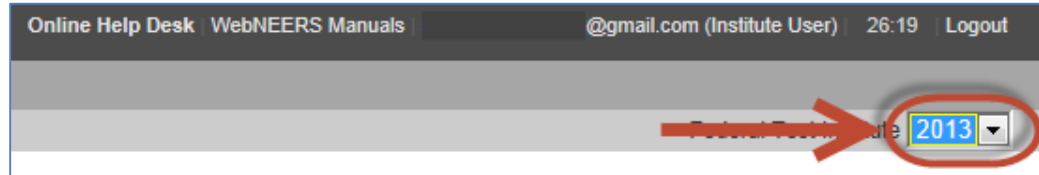
Note: *The screenshots above show "2013" as an example. However, you can select any year you wish to return to.*

3. Download data export files or view/print reports, as needed
4. Use the year dropdown next to the name of your university (on the top right of your screen) to return to the current year to ensure that you are attached to the correct database

Note: *It is important to make sure step #4 is completed, otherwise <u>Institute Level</u> users will not be able to preview and manage the current year's data, users and other reporting.*

Section 8 – EFNEP Annual Update/5-Year Plan

Background on Annual Update/5-Year Plan

The Annual Update/5-Year Plan is the program plan each Land-Grant University must write and submit for approval. It is one of the Expanded Food and Nutrition Education Program's (EFNEP) yearly reporting requirements. Each year either an Annual Update or a 5-Year Plan is due; not both. The Annual Update/5-Year Plan is completed through the Web-Based Nutrition Education Evaluation and Reporting System (WebNEERS). The Annual Update/5-Year Plan is important because without approval, Federal Funds (first quarter funds of the next fiscal year) will not be released to the university.

Overview of the Reporting Requirement

	5-Year Plan	Annual Update
Brief Description	A strategic plan of what is to be accomplished over the next five years – includes some reporting of results from the previous year.	An update/revision to the proposal reported through the 5-Year Plan – includes some reporting of results from the previous year. ****_Please Migrate the Approved Plan to complete the Annual Update._**
Due Date	July 1st	July 1st
Frequency of Submission	Once every five years (FY2016, FY2021, etc.). *	Once per year except years in which a 5-Year Plan is due. *
Information Required	Narrative information and data related to the situation, inputs, outputs, program priorities, outreach in environmental settings, outreach in sectors of influence, and impacts.	Same as the 5-Year Plan.
Review Process	Formal Federal review.	Federal review for accuracy and completeness.

*_Process for handling Annual Updates **if** a new Extension Director/Administrator is hired after the 5-Year Plan is approved. The incoming Director/Administrator has the option to let the previous administrator's signature serve as approval from the office for the remainder of the 5-year plan period or the incoming Director/Administrator may choose to review the annual update themselves their first year for the remaining 5-year plan period._

Note: If the incoming Director/Administrator **_chooses to use the previous administrator's signature_**, then coordinators should **_migrate and edit the annual updates_** as usual only changing the administrator's name in the contact info section of the annual update.

Alternatively, if the incoming Director/Administrator **_chooses to review the annual update_**, then coordinators should **_clone the previous year's file, migrate the cloned file and edit the annual update_**. Cloning will remove the previous administrator's signature. Coordinators can edit the name in the

contact info section and when they are ready to submit they can send the annual update to the new administrator for signature before it is submitted to the national office.

The Main Plan Page

The Annual Update/5-Year Plan has a main plan page. The main plan page is what is seen when the plan is first established, as well as what is seen when opening an existing plan. The top provides descriptive information about the plan, the center includes buttons to access each section of the plan, and the bottom includes options for managing the submission and migration of the plan.
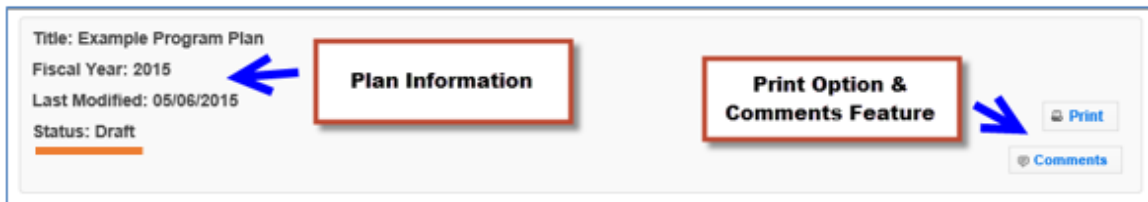
Center Section – Main Plan Page

Section Groupings

The buttons for each section of the plan are grouped according to the type of information/data needed in the report.
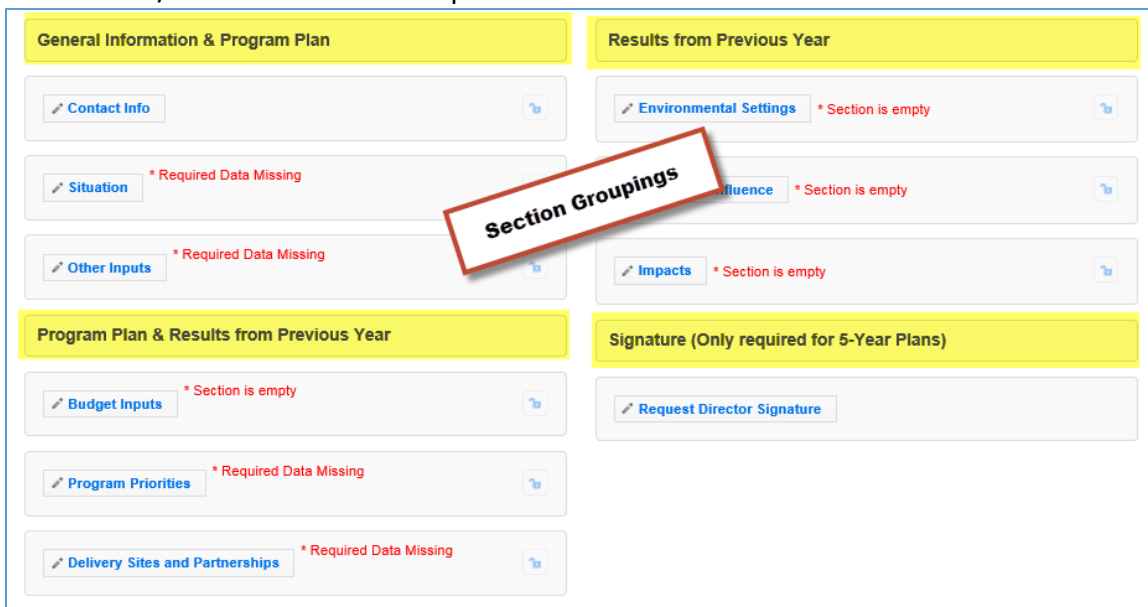
1. <u>General Information and Program Plan</u> – The buttons under this heading capture the contact information for the program and the overview of intended accomplishments in upcoming years.

2. <u>Program Plan and Results from Previous Year</u> – The buttons under this heading serve a dual purpose. They provide an overview of intended accomplishments in upcoming years, as well as report some of the results achieved.
3. <u>Results from Previous Year</u> – The buttons under this heading report results from the previous year.
4. <u>Director Signature</u> – The button under this heading is used to secure your Extension Director or Administrator's signature.

Note:

   Plans are submitted in July which is in advance of the next fiscal year. For example, the FY2017 Annual Update is due July 01, 2016, which is 3 months prior to the start of FY2017. This means that the results reported "from the previous year" will technically be for the previous fiscal year (in this example FY2015) and include projections for the remainder of the year.

Red Asterisk Messages

The center section includes **red asterisk messages** are alerts to sections within which required data is missing and to sections that are empty. A plan cannot be submitted if required data is missing. If **no red asterisk messages** is present, the plan can be submitted. Those sections are optional; the message serves as a visual cue that something additional can be included. Red asterisk messages disappear when addressed.

Note:
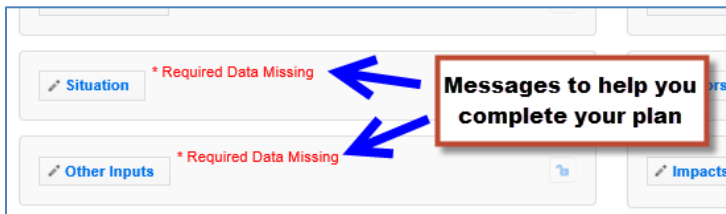
   There may be years when the Federal Budget is passed late in the year. In these rare cases, the Budget Inputs section will be empty when the Annual Update is submitted.

Lock Feature

The **lock** and the **unlock icons** on the main plan page help identify the current status of each section: locked = approved; unlocked = not approved or not yet approved.
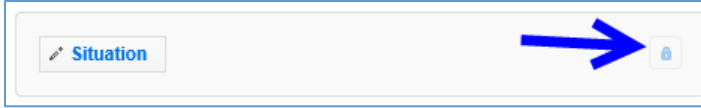
Locked sections prevent users from making edits. For plans that are:

    a. "Under Review", sections are locked because the National Office is in the process of reviewing the plan.

    b. "Approved" or "Needs Revision", sections are locked because the information contained in that section is approved by the National Office and does not need further editing.

    c. Migrated into the next programming year, sections are locked because the data was approved the year prior and if still accurate, can be resubmitted without any additional edits.

Locked sections should only be unlocked if edits are needed. Instructions for unlocking a section are in the Plan Marked "Approved" section below.

Bottom Section – Main Plan Page

This section of the plan changes based on the status of the plan. This is an example from a plan that was revised after it was sent back as "Needs Revision".
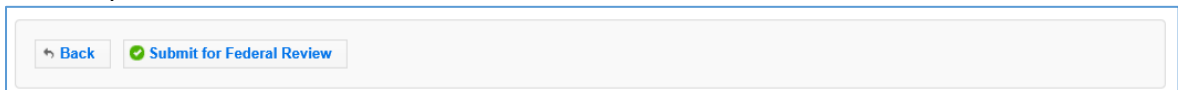
Note: *The submission button will only be visible if the Director's approval has been completed.*

New Extension Director/Administrator

Annual Updates, when a new Extension Director/Administrator is hired after the 5-Year Plan is approved, are to be handled at the discretion of the Institution.   The incoming Director/Administrator has the option to let the previous administrator's signature serve as approval from the Office for the remainder of the 5-year plan period or the incoming Director/Administrator may choose to review the annual update themselves their first year for remainder of the 5-year plan period. See Annual Update Cheat Sheet for additional information.

Quick Tips

Entering Data

The Annual Update/5-Year Plan was set up so you can enter all of your information at once or enter it one section at a time. This means you can save a section within your plan and return later even if some fields (even required ones) are incomplete. This is different than other data entry screens in WebNEERS.

Cancel, Save, and Save and Next Buttons

The **Cancel, Save,** and **Save and Next** buttons are located at the bottom of each section. The **Cancel** and **Save** buttons will cancel or save edits made in the section and return you to the main plan page. The **Save and Next** button saves any edits made in the section and advances you to the next section so you can keep working. All required fields must be complete to submit the plan, but as mentioned above, they do not have to be complete to save your changes.

Multiple Users

The Annual Update/5-Year Plan can be edited by any <u>Institution Level</u> user who has permission to access the **Manage Annual Update Section**. If someone is already editing a section, a message will display at the top of the screen. When this happens, close the section and wait for the other user to finish. Do not make edits when someone else is in the section. This is important because changes made by one user may override changes made by another user if edits are made at the same time.

The following users are currently accessing this page: sblake@csrees.usda.gov.

<u>Any changes you make here could be overwritten by modifications they make.</u>
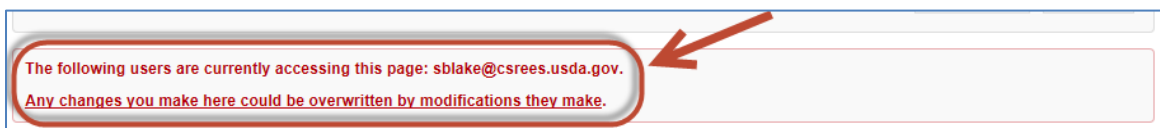
Switching Years – Finding Your Plan

Your plan may reside in a different year than the current reporting year. When this happens, use the year dropdown on the top right of the WebNEERS home screen to change years. This is particularly important for the migration process.

1. If you are not in the year that contains your plan, select the correct year in the dropdown
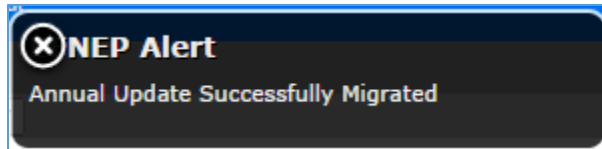
Federal Test Institute | 2013 ▾
2012
2013
2014
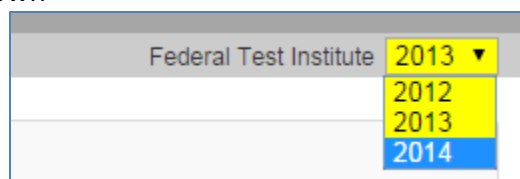
Note: *The years listed in your dropdown may vary from the screenshot above.*

2. Click **OK** to confirm that you want to switch years
3. Remember to switch back to the current year after you finish what you are doing!

Note: *If completing an Annual Update on an Approved Plan, it will be important to return to the year in which the plan was approved and migrate the data to the appropriate program year.*

Annual Update Cheat Sheet – Brief Overview of Instructions

If you have completed an Annual Update in the past, you may not need all of the detailed instructions. This overview walks you through the steps at a high level. For detailed instructions, skip to p.10 or follow the links below to the appropriate sections.

Plans are submitted in July which is in advance of the fiscal year. So, for example, the FY2018 Annual Update is due July 01, 2017, which is 3 months prior to the start of FY2018. This means that the results you report "from the previous year" will technically be from the last fiscal (in this example FY2016) and include projections for the remainder of the year.

New Extension Director/Administrator

The incoming Director/Administrator has the option to let the previous administrator's signature serve as approval from the Office for the remainder of the 5-year plan period or the incoming Director/Administrator may choose to review the annual update themselves their first year for remaining the 5-year plan period.

*If the incoming Director/Administrator **chooses to use the previous administrator's signature**, then coordinators should **migrate and edit the annual updates** as usual only changing the administrator's name in the contact info section of the annual update.*

*If the incoming Director/Administrator **chooses to review the annual update**, then coordinators should **clone the previous year's file, migrate the cloned file and edit the annual update**. Cloning will remove the previous administrator's signature. Coordinators can edit the name in the contact info section and when they are ready to submit they can send the annual update to the new administrator for signature before it is submitted to the national office.*

1. As an Institution Level user, use the dropdown to select the year containing the Annual Update/5-Year Plan you wish to migrate forward into the current reporting year.

Note: *It is important to migrate approved plans forward, as each year, of the 5-Year Plan, builds upon the information entered from the previous years.*

2. Click on **Manage Annual Update / 5-Year Plan**
3. Locate your "Approved" plan, click the migrate button, and follow the steps to migrate your plan into the new year (see **Migration Steps** section for detailed instructions)
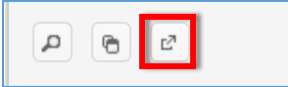
4. Move into the new year using the year dropdown

5. Click on the " ✎ " icon to open the migrated plan.
6. Revise/Update your plan as follows (see **Enter/Revise Plan Information and Data** section for detailed instructions on completing each section)

SECTION	WHAT YOU NEED TO DO
Contact Info	Review for accuracy. If changes are needed, unlock the tab and make them. If not, continue to the next section.
Situation	Review for accuracy. Think about what you intend to do in the coming year. If changes are needed, unlock the tab and make them. If not, continue to the next section.
Other Inputs	Review for accuracy. Think about what you intend to do in the coming year. If changes are needed, unlock the tab and make them. If not, continue to the next section. *Use of Technology*: Coordinator will need to indicate the level of technology integration (low, medium, high) and strategies to be utilized. This information will be added to the Curriculum section. Implementation of a high level of technology will require prior approval from the National Office. No action will be needed if there is no change in the current use of technology or if no technology will be used. *Use of Volunteers*: Coordinator will need to indicate what types of volunteers will be used and what duties volunteers will have. This information will be added to the Inter-Organizational Relationships section. Implementation of a Formal Volunteer Program will require prior approval from the National Office. No action will be needed if there is no change in the current use of volunteers.
Budget Inputs**	Complete Other Funds Received Chart and Description, if applicable. If not continue to the next section.
Program Priorities	For each priority, update the table with your most recent "Actual" value (*e.g., for the FY2017 Annual Update, the last complete data set is 2015, so you enter the corresponding value in the 2015 column/"Actual" row*). If you need to adjust future year targets or if you need to explain your results, use the comments field at the bottom.

SECTION	WHAT YOU NEED TO DO
Delivery Sites and Community Partnerships**	Have regions complete their Delivery Sites and Community Partnerships chart or add it at the <u>Institute Level</u> (see **Manage Delivery Sites** section for detailed instructions). Update the description, if needed.
Environmental Settings**	Review for accuracy. Report accomplishments, not items you plan to work on. If changes are needed, make them. If not, continue to the next section.
Sectors of Influence**	Review for accuracy. Report accomplishments, not items you plan to work on. If changes are needed, make them. If not, continue to the next section.
Impacts**	Have regions enter their Program Impacts and Community Partnership Impacts or add them at the <u>Institute Level</u> (see **Manage Program Impacts** and **Manage Community Partnership Impacts** sections respectively for detailed instructions). Select the ones you want to include using the checkboxes.
Signature	No action is needed; the signature is already attached.
Comments	Review comments from the previous year and address any pending items. Add comments if there are items you need to explain to the National Office that are beyond what you included in the various sections.

Note:

**Data/information reported for sections with the double asterisks above should be for the fiscal year that ends September 30 and should include projections for the remaining months of the year (if applicable) – e.g., for the 2018 Annual Update, FY2017 data should be reported including projections for the upcoming months between now and the end of September.

7. Click **Submit for Federal Review** at the bottom of the plan

⊘ **Submit for Federal Review**
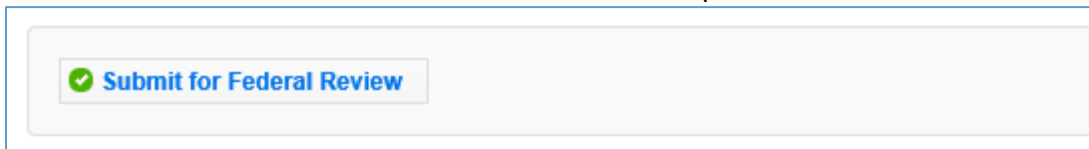
Migrate an Annual Update/5-Year Plan

Overview of Migration

On Annual Update years, you have the option to migrate your plan into the new reporting year. This allows you to work from your existing plan rather than starting from scratch. Please note that the migration affects each section of the plan differently. This chart explains which

sections carry their data forward when you migrate, whether or not the section is locked (pre-approved) and whether you need to fully update a section or simply need to review it and make revisions, where needed.

Note: *If you choose not to migrate the plan, you will be required to enter Program Priorities information from previous years of the 5-Year Plan. Securing the Directors Signature may also be required before you will be able to submit your plan for federal review.*

Note: *If you have a new Director/Administrator who __chooses to review the annual update__, then coordinators should __migrate a clone the previous year's file__.*

Table 1: Overview of Migration

Section	Does Data Carry Forward to New Year?	Locked?	Action Required
GENERAL INFORMATION & PROGRAM PLAN			
Contact Info	YES	YES	Review. Revise, if needed
Situation	YES	YES	Review. Revise, if needed
Other Inputs	YES	Yes	Review. Revise, if needed
PROGRAM PLAN & RESULTS FROM PREVIOUS YEAR			
Budget Inputs	NO	NO	Update
Program Priorities	YES	NO	Update
Delivery Sites and Partnerships	Chart = NO Description = YES	NO	Update
RESULTS FROM PREVIOUS YEAR			
Environmental Settings	YES	NO	Review. Revise, if needed
Sectors of Influence	YES	NO	Review. Revise, if needed
Impacts	NO	NO	Update
SIGNATURE			
Request Director Signature	YES	YES	None, unless the Federal Office specifically requests

Note: *You can migrate multiple plans or you can migrate the same plan multiple times, if needed, but you should only submit one to the Federal Office.*

The **Contact, Situation, Other Inputs, and Request Director Signature** sections are pre-approved (locked) from your previous year's submission. They only need to be unlocked if something has changed and you need to make revisions. If you leave them locked, it indicates to the Federal Reviewer that nothing changed. If you unlock them, they have to undergo Federal review for approval.

When Pre-Approved Sections Require Unlocking

If your Institution is changing the way in which volunteers are used and/or the roles they play within the program or if increased use of technology will occur, the Other Inputs section must be unlocked.

To unlock a section:

1. Click the button to open the section

2. Click the " Locked 🔒 " button on the top right of the screen

3. Click **Ok** on the warning message to confirm that you want to unlock and edit the section or **Cancel** to return to the preview of the page without unlocking it

Note: *If you unlock a section by mistake, you can still cancel the change by clicking cancel at the bottom of the screen*

Sections you need to Update Each Year

The **Budget Inputs, Program Priorities, Delivery Sites and Community Partnerships, Environmental Settings, Sectors of Influence**, and **Impacts** sections must be revised each year. These sections are unlocked. You can simply make edits/additions to them and click save. These undergo Federal review for approval.

Migration Steps

WebNEERS Instructions

1. Log in as an <u>Institution Level</u> user
2. Use the year dropdown on the top right to select the year containing the Annual Update/5-Year Plan you wish to migrate forward into the new year

Note:
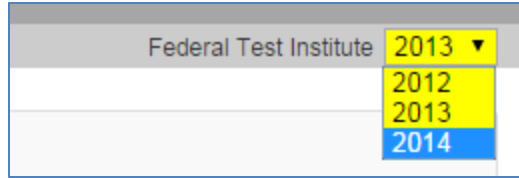
The years listed in your dropdown may vary from the screenshot above.

3. Click **OK** to confirm that you want to switch years
4. Select **Manage Annual Update/5-Year Plan** from the *WebNEERS Home Page*
5. Locate your "Approved" plan and click the migrate button
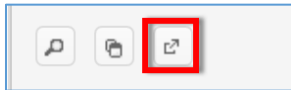
6. Use the dropdown to select the reporting year you wish to migrate Annual Update/5-Year Plan into
7. Click **Migrate** to migrate the plan into the selected year or click **Cancel** to return to the plan without migrating
8. Watch for a message in the top right that the migration was successful

Note:

Sometimes the alert message is quick, if you do not see it, try moving on to step 9. If your plan is not listed in the year you tried to migrate it into, return to step 2 and try again! If you get a red alert message, contact the help desk for assistance.

Note:

Your Manage Annual Updates page will refresh, but you will not see the migrated plan. You have to change to the year you migrated the plan to see the migrated plan (Step 9).

9. Use the year dropdown on the top right to switch to the year you migrated your plan into.
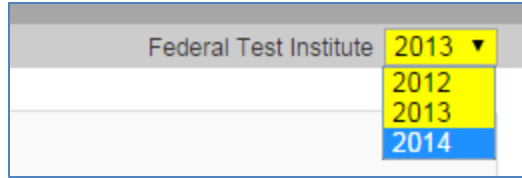
The years listed in your dropdown may vary from the screenshot above.

10. Click "**OK**" to confirm that you want to switch years.

11. Click on the " " icon to open the migrated plan. The migrated plan will be tagged "Migrated" and have the date it was migrated in the **Plan Name**.

12. Follow the instructions in the **Enter/Revise Plan Information and Data** section to complete your plan.

Enter/Revise Plan Information and Data

If you just created the plan, you will automatically land on the main plan page. Please skip ahead to the **General Information and Program Plan** instructions below. If you are accessing a plan you created earlier, follow these steps to open your plan.

WebNEERS Instructions

1. Log in as an Institution Level user.
2. Select "**Manage Annual Update/5-Year Plan**" from the *WebNEERS Home Page.*
3. Locate your plan in the table. The table displays the most recently updated plan at the top, but you can click the up/down arrows in any column to re-sort ascending or descending or use the SEARCH option to quickly locate your plan.

   a. Use the " " icon to edit your plan or the " " icon to preview your plan.

SEARCH:				SHOW 10 ENTRIES	
Manage ⇕	**Plan Name** ⇕		**Fiscal Year** ⇕	**Status** ⇕	**Last Modified** ▼
🔧 📄 ❌	Example Program Plan		2015	Draft	2015/05/06 21:46:49

Note: *You will see either the edit or the preview icon. The edit icon is only visible if the plan's status is draft. If the plan has been submitted or returned, the preview icon will be visible.*

Note: *If there is a plan you no longer need, use the "⊗" icon to delete the plan. The delete icon is only visible if the plan has not been submitted; you cannot delete a plan if it has been submitted to the Federal Office.*

General Information and Program Plan

The buttons included under the **General Information and Program Plan** grouping include: **Contact Information, Situation,** and **Other Inputs**. The buttons under this heading capture the contact information for your program and the overview of what you intend to accomplish in upcoming years. These need to be reviewed each year and revised, as needed.

Figure 1 - Main Plan Page: General Information & Program Plan

Contact Information

The **Contact Info** section is completed when you create the plan (see above) so you may only need to open this section on Annual Update years to review and revise, as needed.

> ***Annual Update Years:*** *If you migrate your plan, this section is* <u>*locked*</u> *and is* <u>*pre-populated*</u> *with the information from the previous year. Only unlock it if you need to make edits, otherwise it is pre-approved.*

Note: *If there is a new Director/Administrator, do not migrate the plan directly. Create a* ***clone of the previous year's file and migrate the cloned file****.*

WebNEERS Instructions

1. From the main plan page, click on the **CONTACT INFO** button.
2. Enter/revise the information as needed.
3. Click **Save** to save and close this section, **Cancel** to close the section without saving, or **Save and Next** to save this section and automatically advance to the next section.

Situation

> ***Annual Update Years:*** *If you migrate your plan, this section is* <u>*locked*</u> *and is* <u>*pre-populated*</u> *with the information from the previous year. Only unlock it if you need to make edits, otherwise it is pre-approved.*

WebNEERS Instructions

1. From the main plan page, click on the **SITUATION** button.
2. Enter/revise the narrative description of your **Situation.**
3. Click the checkboxes to select/deselect your **Geographic Area.**
4. Enter/revise the narrative **Description of Geographic Area.**
5. Enter/revise the narrative description of the **Target Audience.**
6. Click **Save** to save and close this section, **Cancel** to close the section without saving, or **Save and Next** to save this section and automatically advance to the next section.

Description of Fields

Name of the Field	Description
Description of Situation	Provide a general description of the situation in your state/territory that justifies the need for the program. Include any relevant statistics (e.g., poverty levels, obesity rates, etc.) as well as <u>external factors</u> or <u>assumptions</u> that may impact programming now or in upcoming years. The situation should be written so a person unfamiliar with the program can understand. It may include a public value statement. (2000 characters or less) *<u>External Factors</u>: elements in the environment which may positively or negatively influence programming. Examples include: cultural differences, the economy, politics, the media, etc.* *<u>Assumptions</u>: principles, ideas, or beliefs that may influence decisions. Examples include: theories about the program, the people involved, or the way we think the program will work.*
Geographic Area	Select the counties/parishes where your program will provide education during the upcoming fiscal year. If you do not provide education, but you have an important partnership in a location, do not check the box in this section. Instead, describe it in brief in the "Description of Geographic Area" section below.
Description of Geographic Area	For the locations selected above, please briefly describe the reasons they were selected. If there are locations you have partnerships with, but you did not select them above because you do not provide education there, you can briefly describe them here. Please include any plans to expand, eliminate or relocate programming in upcoming years along with an explanation of how and why. (2000 characters or less)

Name of the Field	Description
Target Audience	Define your target audience within programmatic guidelines and briefly describe how you are targeting them. If you intend to change your target audience or your approach to reaching them in upcoming years, briefly describe how and why. (2000 characters or less) **Note:** *For EFNEP, this must include programming to low-income families and low-income youth. For further information see EFNEP's Policy Document.*

Other Inputs

Annual Update Years: If you migrate your plan, this section is locked and is pre-populated with the information from the previous year. Only unlock it if you need to make edits, otherwise it is pre-approved.

Situations Requiring Unlocking

If your Institution is changing the way in which volunteers are used and/or the roles they play within the program or if increased use of technology will occur, the Other Inputs section must be unlocked and updated.

WebNEERS Instructions

1. From the main plan page, click on the **OTHER INPUTS** button.
2. Enter/revise the narrative description of your **Curricula.**

Note:
Use of Technology
1. Indicate the Implementation Levels for the technology being proposed:
   a. Low Implementation– Strategies may include, email/text messaging or similar existing resources.
   b. Medium Implementation– Strategies may include, online makeup lessons, social media to reinforce, recruit, or review and follow-up with participants.
   c. High Implementation* – Strategies may include, blended lessons, interactive online lessons, or online group meetings.
2. Strategies Planned for integration into existing programming.
High technology integration requires prior National Office approval.

3. Select/revise the type of **Inter-Organizational Relationships**. Make sure you select one option for each row even if the relationship is "None".
4. Use the " ⊕ Add Other " button to add additional organizations not listed in the chart.
5. Enter/revise the narrative **Description of Inter-Organizational Relationships.**

> **Note:**
> **Use of Volunteers***
> 1. List all type(s) of volunteers to be used.
>   a. Non-Agency Volunteers
>   b. Agency Paid Volunteers
>   c. Student/Intern Volunteers
> 2. Indicate what each volunteer type will do to support EFNEP.
>
> **Formal Volunteer Program integration into programming requires prior National Office approval.*

6. Click **Save** to save and close this section, **Cancel** to close the section without saving, or **Save and Next** to save this section and automatically advance to the next section.

Description of Fields

Name of the Field	Description
Curricula	Name and briefly describe the key university approved curricula for adult and for youth programming. Describe curricula with respect to audience appropriateness, behavior change emphasis, and evidence-base. Make sure it is clear that each <u>core area</u> is addressed with adults and with youth. If you intend to change or revise curricula in upcoming years, briefly describe how and why. (2000 characters or less) *Core areas (EFNEP): Diet Quality/Physical Activity, Food Resource Management, Food Safety, Food Security* **Note:** *This should not be an exhaustive list of curricula, but rather a list of the primary curricula used across the state/territory.* **Note:** *Some grades do not cover food resource management or food security. So, if you are only working with K-2nd or 3rd-5th grades, your youth curricula may not include all core areas.* If technology will be used, indicate the level of implementation and strategies you plan to use.

Name of the Field	Description
Inter-Organizational Relationships	Review the list of agencies, organizations, and other partners in the table. For each partner you work with think about the relationship at the state/territory level. If you have more than one type of relationship with a particular agency, organization, or partner determine which type of relationship is primary. Check the radio box in the appropriate column of the table to indicate the primary type of relationship. Options are: <u>Network</u>, <u>Cooperator</u>, <u>Coordinator/Partnership</u>, <u>Coalition</u>, or <u>Collaborator</u>. If no relationship exists, select "none". *<u>Network:</u> getting together.* *<u>Cooperator:</u> building trust and ownership.* *<u>Coordinator/Partnership:</u> developing strategic plans.* *<u>Coalition:</u> taking action.* *<u>Collaborator:</u> establishing long-term commitment.*
Description of Inter-Organizational Relationships	Summarize any plans to change, develop/enhance or expand inter-organizational relationships in upcoming years. Briefly describe with whom, how and why (1000 characters or less). If volunteers will be used, indicate the types of volunteers and their duties.

Program Plan and Results from Previous Year

The buttons included under the **Program Plan and Results from Previous Year** grouping include: **Budget Inputs, Program Priorities**, and **Delivery Sites and Partnerships**. The buttons under this heading serve a dual purpose. They provide an overview of what you intend to accomplish in upcoming years as well as report some of the results you achieved. These include fields that need to be reviewed and revised, as needed as well as fields that are updated each year.

Note:

Plans are submitted in July which is in advance of the fiscal year. So, for example, the FY2018 Annual Update is due July 01, 2017, which is 3 months prior to the start of FY2018. This means that the results you report "from the previous year" will technically be for the year you are currently part of (in this example FY2017) and include projections for the remainder of the year.

Figure 2 - Main Plan Page: Program Plan & Results from Previous Year

Budget Inputs

> **Annual Update Years**: If you migrate your plan, this section is <u>unlocked</u> and is <u>empty</u>. You need to update this information every year.

WebNEERS Instructions

1. From the main plan page, click on the **BUDGET INPUTS** button.
2. If applicable, click on the hyperlinks to preview your most recently approved **Federal Budget Sheet** or **Budget Justifications.**

Note:

*Budgets and Budget Justifications are only visible if you have an approved budget submission in WebNEERS for that fiscal year**. **When you initially submit your plan, your budget and justification may not be visible, but they will appear once approved.***

Note:

For instructions on budget submission, see "Budget and Justification Instructions", available http://nifa.usda.gov/efnep-reporting-requirements

3. Enter data on the amount received and the source of funds for each type of **Other Funds Received.**
4. Enter/revise the narrative **Description of Other Funds Received.**
5. Click **Save** to save and close this section, **Cancel** to close the section without saving, or **Save and Next** to save this section and automatically advance to the next section.

Description of Fields

Name of the Field	Description
Federal Budget Sheet	Nothing is required here. This is simply a way to preview the most recently approved budget sheet.
Budget Justification	Nothing is required here. This is simply a way to preview the most recently approved budget justification.
Other Funds Received	Please enter other sources of funding received during the last Fiscal Year. Do not include funds captures in the Federal Budget Sheet. • *Other Federal: includes funding from other Federal programs/agencies - not EFNEP. Examples are other Federal grants and contracts.* • *Other Public: includes non-Federal funds. Examples are State and Local government and university grants, contracts, and cash contributions.* • *Other Private: includes funds from the private sector. Examples are grants and contracts from foundations and non-profits, and cash contributions from businesses, individuals, and others in the private sector.* • *In-Kind: includes cash estimates of non-cash donations. Examples are food, transportation, and agency staff time.*
Description of Other Funds Received	Please discuss any plans/strategies to maintain or to increase other sources of funds in upcoming years.

Program Priorities
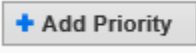
Annual Update Years: If you migrate your plan, this section is unlocked, but is pre-populated with the information from the previous year. You need to update the "actual" value in the data chart each year, and revise other sections as needed.

Note: *If you choose not to migrate the plan, you will be required to enter Program Priorities information from previous years of the 5-Year Plan to demonstrate progress over-time toward your identified program priorities.*

WebNEERS Instructions

1. From the main plan page, click on the **PROGRAM PRIORITES** button.
2. Click " **+ Add Priority** " to add a new priority or the " 🔧 " icon open an existing priority.

Note: *If needed, use the " ❌ " icon to delete a priority. The delete icon is only visible if the priority is not part of a submitted plan; you cannot delete a priority if it has been submitted to the Federal Office.*

3. Enter/revise the **Title** for the Priority.
4. Check the boxes to select/deselect the **Focus Areas.**
5. Click " ⊕ **Add Focus** " to add an additional focus area.
6. Enter/revise the narrative **Description.**

7. Use the dropdown to select/verify the **Measurement** type.
8. Select **Yes** for quantitative (numeric) measures.
   a. Select/verify the **Unit of Measure.**
   b. If it is a *5-Year Plan* year
      i. Enter the **actual** numeric value for the baseline year.
      ii. Enter the **target** values for all five upcoming years.
   c. If it is an *Annual Update* year,
      i. Enter the **actual** numeric value for the year that just ended.

Note: *Only enter numbers in the table.*

9. Select No for qualitative (narrative) measures.
10. If it is a *5-Year Plan* year
    a. Enter the **actual** descriptive value for the baseline year.

b. Enter the **target** values for all five upcoming years.

11. If it is an ***Annual Update*** year,
    a. Enter the **actual** descriptive value for the year that just ended.

12. Enter **Comments.** (optional)
13. Click "**Save**" to save the priority or the "**x**" at the top of the popup to cancel without saving.
14. Repeat Steps 2-8 until you have added/updated all of your priorities.
15. Check the checkbox in the "**Select**" column to include the priority in your submission.

Note:

You *may add as many priorities as you want, but a maximum of five can be selected to send forward to the Federal Office. The Federal Office can only see the ones you select.*

16. Click **Save** to save and close this section, **Cancel** to close the section without saving, or **Save and Next** to save this section and automatically advance to the next section.

Description of Fields

Name of the Field	Description
Program Priorities	Develop 3-5 SMART (specific, measurable, action-oriented, realistic, timely) program priorities to focus on over the next five years. 2-3 must directly measure Core Areas; others may focus on Secondary Areas. You may create more than 5 priorities, but a maximum of 5 may be submitted to the National Office. Make sure you check the boxes in the select column for those priorities you want to submit to the National Office. Only checked items will be visible at the Federal Level. Core areas: Diet Quality/Physical Activity, Food Resource Management, Food Safety, Food Security. Secondary areas: Family/Interpersonal Relationships, Management/Leadership, Sectors of Influence, Environmental Settings. Note: *Secondary areas should not be the focus of your nutrition education program. They can support program goals, but should not be programmatic content areas.*

Delivery Sites and Community Partnerships

This section displays a list of all of your regions. If they entered Delivery Sites and Community Partnership (DSP) data you can include it in your submission. The list also includes any DSP data added by Institution level users. If you want to quickly review each region's submission or if you need to add additional examples, return to the WebNEERS home screen and click on **Manage Delivery Sites/Partnerships** (see the **Manage Delivery Sites and Community Partnerships** section for instructions).

> *Annual Update Years: If you migrate your plan, this section is underlined unlocked and is underlined empty. You need to update this information every year.*

WebNEERS Instructions

From the main plan page, click on the **DELIVERY SITES AND PARTNERSHIPS** button.
1. Click the checkboxes to select/deselect the region(s) and/or the Institution Level record(s) you want to include in your **Delivery Sites/Locations and Community Partnerships (DSP)** submission.

Note: *You cannot add an Institution Level record within a plan, see the [Manage Delivery Sites and Community Partnerships](#) section below for instructions.*

2. If needed, manually update the data in the chart.

Note: *If you manually update the data and then check or uncheck a checkbox, the manual changes are lost/overridden. If possible, it is better to contact your Region Level users and have them make updates/edits.*

3. Enter/revise the narrative **Description** of your Delivery Sites/Locations and Community Partnerships.
4. Click **Save** to save and close this section, **Cancel** to close the section without saving, or **Save and Next** to save this section and automatically advance to the next section.

Description of Fields

Name of the Field	Description
Delivery Sites/Locations and Community Partnerships (DSP) Chart	Report the total number of delivery sites and the total number of community partnerships for each type of site/location listed below. If you wish to include the data submitted by your regions, select them from the list below. You can manually change the data, if needed, but you must click "save" to save the changes.
Delivery Sites/Locations and Community Partnerships (DSP) Chart - continued	If you later check/uncheck a region, your manual changes will be lost. To enter the data at the institution level, return to the home screen, click on Manage Delivery Sites and Partnerships and select add a new Institution level record. After saving, the Institution level record will appear in the list below.
Description of DSPs	Summarize any plans to expand, eliminate or relocate program delivery sites/locations or to change, develop/enhance or expand community partnerships in upcoming years. Briefly describe with whom, how, and why. (1000 characters or less)

Results from Previous Year

The buttons included under the **Results from Previous Year** grouping include: **Environmental Settings, Sectors of Influence**, and **Impacts**. The buttons under this heading report results from the previous year. These need to be reviewed, revised, and updated each year.

Note:

Plans are submitted in July which is in advance of the fiscal year. So, for example, the FY2018 Annual Update is due July 01, 2017, which is 3 months prior to the start of FY2018. This means that the results you report "from the previous year" will technically be for the year you are currently part of (in this example FY2017) and include projections for the remainder of the year.

Figure 3 - Main Plan Page: Results from Previous Year

Environmental Settings

> ***Annual Update Years***: *If you migrate your plan, this section is underlined, but is pre-populated with the information from the previous year. You need to read through the items and update them each year.*

WebNEERS Instructions

1. From the main plan page, click on the **ENVIRONMENTAL SETTINGS** button.

2. Click the checkboxes to select/deselect the **Short Term Indicators** you achieved over the past year.

Note: The Community Partnership Impacts information can be added at the Institute or Region Level. Instructions for adding Community Partnership Impacts is addressed under Manage Community Partnership Impacts below.

a) Select the Short Term Community Partnership Impacts, from the available entries, to be included in your Annual Update .

3. Click on the tab for **Diet Quality** tab in the **Medium Term Indicators** section.

4. Click the checkboxes to select/deselect the items achieved over the past year.

5. Click " ⊕ **Add Other** " to enter an example.

6. Repeat steps 3-5 for the **Physical Activity, Food Resource Management, Food Safety** and **Food Security.**

7. Select the Medium Term Community Partnership Impacts, from the available entries, to be included in your Annual Update.

8. Click on the tab for **Diet Quality** in the **Long Term Indicators** section.

See screenshot on following page.

Screenshot – step 8 above.

9. Click the checkboxes to select/deselect the items achieved over the past year.
10. Click " ⊕ **Add Other** " to enter an example.
11. Repeat steps 7-9 for the **Physical Activity, Food Resource Management, Food Safety** and **Food Security.**
12. Select the Long Term Community Partnership Impacts, from the available entries, to be included in your Annual Update.

13. Click **Save** to save and close this section, **Cancel** to close the section without saving, or **Save and Next** to save this section and automatically advance to the next section.

Description of Fields

Name of the Field	Description
Environmental Settings	Check all areas in which you are working within an Environmental Setting (Organization/Community Level) to reduce challenges and increase opportunities for low-income individuals, families, and/or households. *All outcomes should be helpful to the low-income audience and should support/further the work of low-income nutrition education, whether explicitly stated, or not.*

Name of the Field	Description
Short Term Indicators*	Organizations and Communities gain awareness, knowledge, and/or interest.
Medium Term Indicators*	Organizations and Communities commit to change.
Long Term Indicators*	Organizations and Communities experience improved conditions. A culture exists for resolving concerns and taking action at a multi-organization / community level.
Community Partnership Impacts	Community partnership impacts are related to work at the community level (i.e., work with non-profits, universities, private organizations or industry groups). It takes more than one program or partner to produce community level success. Community partnership impacts highlight the work of your program as one of multiple groups that drove a community action. Choose community health change efforts that have potential or demonstrated benefit in EFNEP core areas or that improve the lives of limited resource audiences. Consider tying community partnership impacts to program priorities. This can be done by clicking the wrench icon to open the impact and checking the box to select the related program priority in the Program Priorities Section. Make sure you check the boxes in the select column to include impacts in your submission. Only checked items will be visible at the Federal Level. Note: *This option is only available within the program plan. To add a community partnership impact, return to the home screen and go to the "Manage Community Partnership Impacts" section.* Note: *If your community partnership impact is selected for use at the Federal level, the text may be edited to fit the space.*

For complete list of indicators, see Appendix 1 located at the end of this section.

Sectors of Influence

Annual Update Years*: If you migrate your plan, this section is <u>unlocked</u>, but is <u>pre-populated</u> with the information from the previous year. You need to read through the items and update them each year.*

WebNEERS Instructions

1. From the main plan page, click on the **SECTORS OF INFLUENCE** button.

2. Enter/revise the data in the **Organizational Involvement** chart.
   Screenshot on following page.

Sectors of Influence

Check all areas in which you are working within and across sectors of influence (government, media, industry, agriculture, health care, and other systems) to reduce challenges and increase opportunities for low-income individuals, families, and/or households. All outcomes should be helpful to the low-income audience and should support/further the work of nutrition education programs, whether explicitly stated, or not. Our role is to appropriately inform and influence the sectors, specifically:

-Keeping in mind the low-income population for decisions made;
-Considering what is reasonable and practical in decisions made;
-Thinking through how to incorporate/coordinate with what is done through low-income nutrition education efforts; and
-Making our nutrition education programs a part of the solution (e.g. increasing visibility and access to our programs as a "structural" component of solutions and actions taken).

Note - We are not advocating for any specific policy or taking any specific position. The examples below are only examples of what you could be doing. Different actions/approaches and solutions may be appropriate depending on the situation.

Organizational Involvement

For the examples you select, indicate the number of other organizations involved. Indicate all that apply.

Type of Organizations	# Involved
Universities	2
Government Agencies	0
Business/Industry	0
Non-Profit Agencies	0
Other	0

3. Click the checkboxes to select/deselect the **Short Term Indicators** you achieved over the past year.

Short Term Indicators

Sector representatives identify and define social structure and policy relevant issues.

	Diet Quality	Physical Activity	Food Resource Management	Food Safety	Food Security
Participate in discussions with sector representatives regarding the potential impact of practices, structures, regulations, and policies on low-income audiences.	☐	☐	☐	☐	☐
Convene taskforces, expert committees, or advisory groups to determine the extent of concern and potential for resolution.	☐	☐	☐	☐	☐
Commit to collaborate and communicate within and across sectors to address identified needs and determine respective roles of responsibility.	☐	☐	☐	☐	☐

Community Partnership Impacts

SEARCH: [   ]   SHOW 10 ▼ ENTRIES

Select ⇕	Options	Title ▾	Stage ⇕	Term ⇕	Type ⇕	Focus ⇕	Participant Type ⇕	Site(s) ⇕

No data available in table

SHOWING 0 TO 0 OF 0 ENTRIES   ○ ○

Note:

The Community Partnership Impacts information can be added at the Institute or Region Level. Instructions for adding Community Partnership Impacts is addressed under Manage Community Partnership Impacts below.

a) Select the Short Term Community Partnership Impacts, from the available entries, to be included in your Annual Report.

4. Click on the tab for **Diet Quality** in the **Medium Term Indicators** section.

5. Click the checkboxes to select/deselect the items you achieved over the past year.
6. Click " " to enter your own example.
7. Repeat steps 4-6 for the **Physical Activity, Food Resource Management, Food Safety** and **Food Security.**
8. Select the Medium Term Community Partnership Impacts, from the available entries, to be included in your Annual Report

9. Click on the tab for **Diet Quality** in the **Long Term Indicators** section.

10. Click the checkboxes to select/deselect the items you achieved over the past year.
11. Click " " to enter your own example.
12. Repeat steps 8-10 for the **Physical Activity, Food Resource Management, Food Safety** and **Food Security.**
13. Select the Long Term Community Partnership Impacts, from the available entries, to be included in your Annual Report

14. Click **Save** to save and close this section, **Cancel** to close the section without saving, or **Save and Next** to save this section and automatically advance to the next section.

Description of Fields

Name of the Field	Description
Sectors of Influence	Check all areas in which you are working within and across sectors of influence (government, media, industry, agriculture, health care, and other systems) to reduce challenges and increase opportunities for low-income individuals, families, and/or households. *All outcomes should be helpful to the low-income audience and should support/further the work of low-income nutrition education, whether explicitly stated, or not.* EFNEP's role is to appropriately inform and influence the sectors, specifically: • Keeping in mind the low-income population for decisions made; • Considering what is reasonable and practical in decisions made; • Thinking through how to incorporate/coordinate with what is done through low-income nutrition education efforts; and • Making our nutrition education programs a part of the solution (e.g. increasing visibility and access to our programs as a "structural" component of solutions and actions taken). Note: *EFNEP does not advocate for any specific policy or taking any specific position. Different actions/approaches and solutions may be appropriate depending on the situation.*
Organizational Involvement	For the examples you select, indicate the number of other organizations involved. Indicate all that apply.
Short Term Indicators*	Sector representatives identify and define social structure and policy relevant issues.
Medium Term Indicators*	Sector representatives influence action.
Long Term Indicators*	Conditions improve within and across states.

Name of the Field	Description
Community Partnership Impacts	Community partnership impacts are related to work at the community level (i.e., work with non-profits, universities, private organizations or industry groups). It takes more than one program or partner to produce community level success. Community partnership impacts highlight the work of your program as one of multiple groups that drove a community action. Choose community health change efforts that have potential or demonstrated benefit in EFNEP core areas or that improve the lives of limited resource audiences. Consider tying community partnership impacts to program priorities. This can be done by clicking the wrench icon to open the impact and checking the box to select the related program priority in the Program Priorities Section. Make sure you check the boxes in the select column to include impacts in your submission. Only checked items will be visible at the Federal Level. Note: *This option is only available within the program plan. To add a community partnership impact, return to the home screen and go to the "Manage Community Partnership Impacts" section.* Note: *If your community partnership impact is selected for use at the Federal level, the text may be edited to fit the space.*

For complete list of indicators, see Appendix 2 located at the end of this section

Impacts

This section displays all program impacts and qualitative examples entered by Region Level and Institution Level users. If you want to quickly review each region's submission or if you need to add additional ones, return to the WebNEERS home screen and click **Manage Program Impacts** (see the **Manage Program Impacts** section for instructions). You cannot add impacts or examples from within the plan.

> *Annual Update Years*: *If you migrate your plan, this section is* unlocked *and is* empty*. You need to update this information every year.*

WebNEERS Instructions

1. From the main plan page, click on the **IMPACTS** button.
2. In the **Program Impacts, Environmental Settings Qualitative Examples** and the **Sectors of Influence Qualitative Examples** sections:

    - Use the " ⚲ " icon to preview/edit the impact or the " 🔍 " icon to preview the impact or example. If the " 🔍 " icon is visible and you need to make edits, uncheck the checkbox in the "**Select**" column, click **Save**, and click the **IMPACTS** button to reopen the section.

Note:

If no impacts or examples exist for one of the sections, the table will be empty.

Note:

If you edit a regional impact at the Institution level*, those edits are also visible to the* Regional Level *user.*

    - Use the " ⊗ " icon to hide the impact or example, if needed.
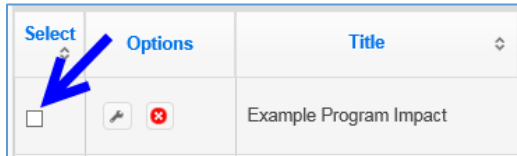
Note:

If you hide an example by mistake, return to the WebNEERS home screen, click on **Manage Program Impacts**, *click on the* **View Hidden Program Impacts** *button, and click the " ✔ " icon to unhide it.*

Note: *You will see either the edit and delete icons or the preview icon. The edit and delete icons are only visible if the impact is not associated with a plan submitted to the Federal Office. If the impact was submitted, only the preview icon will be visible.*

3. If the example in the **Program Impacts** section and is related to a **Program Priority:**
   a. Scroll to the **Program Priorities** section.
   b. Check the box to select the priority the impact relates to.
   c. Click **Save** to save changes or click the "**x**" on the top right of the pop-up to close without saving the changes.

4. Check the checkbox in the "**Select**" column to include up to three (3) **Program Impacts.**

5. Ensure that the **Community Partnership Impacts** selected in **Environmental Settings** section and the **Sectors of Influence** section are displayed below **Program Impacts.**
6. Click **Save** to save and close this section, **Cancel** to close the section without saving, or **Save and Next** to save this section and automatically advance to the next section.

Description of Fields

Name of the Field	Description
Program Impacts	Submit up to 3 qualitative (narrative/descriptive) examples highlighting the impact of your program. Program impacts are related to work at the individual level (i.e., work with participants or collaborators). Choose ones which: show behavior change, provide evidence of improved quality of life, and best represent the work of your program. Consider tying qualitative program impacts to program priorities. This can be done by clicking the wrench icon to open the impact and checking the box to select the related program priority in the Program Priorities Section. Make sure you check the boxes in the select column to include impacts in your submission. Only checked items will be visible at the Federal Level. Note: *This option is only available within the program plan. To add a program impact, return to the home screen and go to the "Manage Program Impacts" section.* Note: *If your program impact is selected for use at the Federal level, the text may be edited to fit the space.*
Community Partnership Impacts	If you selected any **Community Partnership Impacts** in the Environmental Settings section or the Sectors of Influence section, verify that they appear here. To add a **Community Partnership Impact**, return to the home screen and go to the "Manage Community Partnership Impacts" section. Make sure you check the box in the select column in the Environmental Settings or Sectors of Influence section to include the example in your submission. Only checked items will be visible at the Federal Level. Note: *If your qualitative example is selected for use at the Federal level, the text may be edited to fit the space.*

Signature

The section included under the **Signature** grouping is: **Request Director Signature**. This is used to secure your Extension Director or Administrator's signature, a requirement for 5-Year Plan years. The signature only needs updating Annual Update years if required by your university or if specifically requested by the Federal Office. You will only be able to request your Director's/Administrator's signature if you have completed all required sections of the plan.

And, you should only send your plan to your Director/Administrator after your plan is finalized because any changes you make to your plan after it is approved will have to be reapproved (i.e., they will negate your approval status). After your Director/Administrator approves your plan, the submit button will appear.

Note: *Your Director/Administrator does not need access to WebNEERS to review and approve the plan. He/she will receive an email from "EFNEP Admin" with a link to an html (onscreen view) of the plan. At the bottom there is an option to 'Approve' or to send it back as 'Needs Revision'.*

Figure 4 - Main Plan Page: Signature

Note: *If there is a new Director/Administrator, the incoming Director/Administrator has the option to let the previous Administrator's signature serve as approval from the Office for the remainder of the 5-year plan period or the incoming Director/Administrator may choose to review the annual update themselves their first year for the 5-year plan period.*

Request Director Signature

This Request Director Signature option is only available after you complete all required sections of your plan. A signature can be requested if "**section is empty**" messages are displayed; these sections are optional.

> *Annual Update Years: If you migrate your plan, this section is* <u>locked</u> *and is* <u>pre-populated</u> *with the signature from the previous year. Only unlock it if you need to get a new signature per your university requirements or per a special request from the Federal Office, otherwise it is pre-approved.*

Note: *If you choose not to migrate the plan, you will be required to secure the Directors Signature before you will be able to submit your plan for federal review.*

WebNEERS Instructions

1. From the main plan page, click on the **REQUEST DIRECTOR SIGNATURE** button.
2. Enter your Extension Director or Administrator's email address. Make sure it is accurate.
3. Click **Send to Director for Approval** to send an email to your director requesting his/her approval of the plan or **Cancel** to return to the main plan page without sending.

Tip: It is a good idea to notify your Director that he/she should watch for a message from "EFNEP Admin" which will provide the link he/she needs to approve your plan. Messages are sent instantly and should arrive within minutes, but occasionally these messages get filtered as junk mail so an Administrator may need to check there as well. To assist your Director, you may also want to print off or provide him/her with the **Director Instructions**.

4. If you need to resend the email or request a signature from someone different, click the "**Cancel Request for Signature**" button and then repeat steps 1-3.
5. If your plan comes back as "Needs Revision", contact your Director to see what changes you need to make, update your plan, click the "**Resubmit with Changes**" and repeat steps 1-3 to resend to your Extension Director or Administrator.

Note: As soon as your Director clicks "approve" your plan will be submitted to the Federal Office. This happens automatically.

Tip:
You may want to log into your plan periodically to make sure your Director approved it. If he/she has not, you might want to follow-up by phone or email.

Director Instructions

1. Watch for an email from EFNEP Admin (EFNEP-admin@webneers.net).
2. Click on the link within the email message to access the plan.

Wed 7/29/2015 1:44 PM
beta-admin <beta-admin@webneers.net>
EFNEP 5-Year Plan Approval

To

You have been identified as the Director who is responsible for approving North Dakota State University's EFNEP 5-Year plan.

In order to approve the 5-Year plan please click the link below, review the plan and if it meets with your approval click the "Mark Plan as Approved" button at the bottom of the page. If it doesn't, click the "Needs Revision" button at the bottom of the page.

http://beta.webneers.net/annualupdate/director_approval/1/73/133/6987d67c00c96b2d72d235228bb262a1c75f95e6

Note:
If the request for signature was cancelled by the plan preparer, the link will no longer work; you must request a new one.

3. Review the plan.
4. If it is acceptable click "**Approve**" at the bottom of the plan; if not, click "**Needs Revision.**"

Approve ✔   Needs Revision ▽
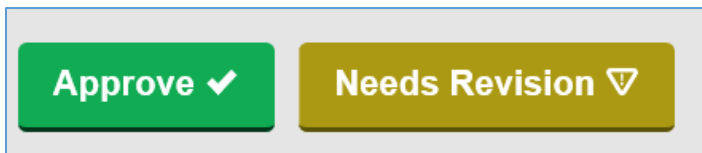
Note:
*This director approval feature was designed for people without WebNEERS accounts. If the Director has an account and is logged in when he/she clicks "**Approve**" or "**Needs Revision**" a red error message may flash and it may return him/her to a page that says "page cannot be found". This does not affect the approval process and can be disregarded.*

Comments (optional)

The **Comments** feature (button on top right of main plan page) allows two-way communication between the <u>Institution Level</u> submitter and the <u>Federal Level</u> reviewer. You can use this to send any additional comments to the Federal reviewer and they will use this to send you feedback on your plan after they review it.

> *Annual Update Years*: *If you migrate your plan, all institution and federal comments from previous years will be visible.*

1. From the main plan page, click on the **Comments** button on the top right of the screen.

Title: Example Program Plan
Fiscal Year: 2015
Last Modified: 05/06/2015
Status: Draft
🖨 Print
💬 Comments
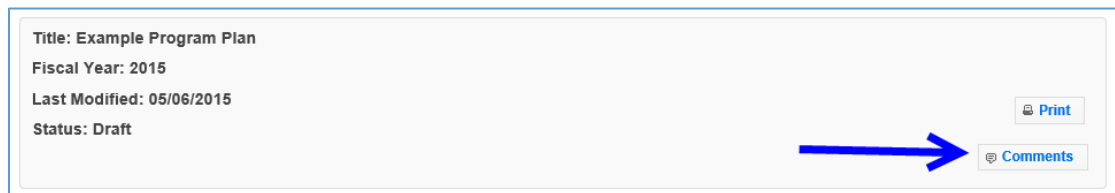
2. Enter your comment in the **Add Comment** field.

3. Click the **Add Comment** button to add the comment. After doing so, it will look like this:
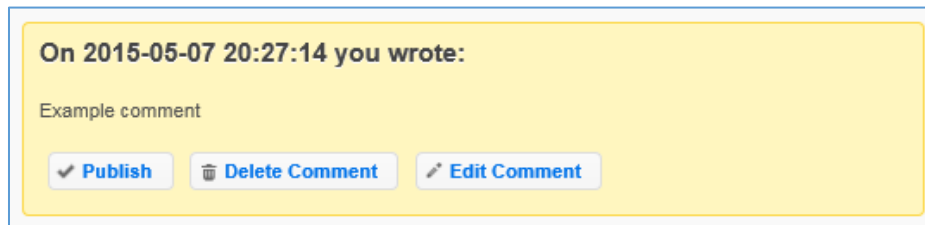
On 2015-05-07 20:27:14 you wrote:

Example comment

✔ Publish   🗑 Delete Comment   ✎ Edit Comment

4. Click **Publish** to make the comment visible to the Federal level upon submission.
5. Click **Delete Comment** to delete the comment.
6. Click **Edit Comment** to edit the comment.

Note:

*Only published comments are visible at the Federal level. If you publish a comment by mistake, you can click **Unpublish**. This will save the comment, but make it invisible to the Federal level upon submission.*

7. Click the "**x**" on the top right of the pop-up to close the **Comments** section/return to your plan.

Plan Submission

After you complete your Annual Update/5-Year Plan, you must submit it to the Federal Office for approval.

Understand 'Submission Status'

Your plan's status will always be one of the following. You can find the status by clicking "**Manage Annual Update/5-Year Plan**" from the *WebNEERS Home Page* and viewing the "**Status**" column or by opening your plan and looking at the **top section of the main plan page**.

1. **Draft:** This status indicates that you have not submitted your plan. It is in draft form.
2. **Pending**: This status indicates that you have submitted your plan, but the Federal Office has not begun its review. While your submission is "Pending" review you can still make edits to your plan or cancel your submission.
3. **Under Review**: This status indicates that the Federal Office has begun reviewing your plan. While your submission is "Under Review" you cannot cancel your submission or make edits. If you unlock a section, make edits, and click save, the system will generate a cloned version of your plan inclusive of your changes.
4. **Needs Revision**: This status indicates that the Federal Office has reviewed your plan and discovered one or more issues. You will need to address the issues and resubmit your plan (see "**Revise and Resubmit Annual Update/5-Year Plan**" for instructions). *See additional notes below.*

Sections that are locked are approved; sections that are unlocked need revision. Notes from the reviewer(s) about your plan and what needs to be revised can be found in the "Comments" section.

5. **Approved**: This status indicates that the Federal Office has reviewed your plan and has approved it. No further action is needed.

When the plan is approved, all sections are locked. Notes from the reviewer(s) about your plan can be found in the "Comments" section.

Submit Annual Update/5-Year Plan for Federal Review

WebNEERS Instructions

1. Select "**Manage Annual Update/5-Year Plan**" from the *WebNEERS Home Page.*

2. Click the "" icon to open your plan.
3. Click **Submit for Federal Review** at the bottom of the plan.

✅ Submit for Federal Review
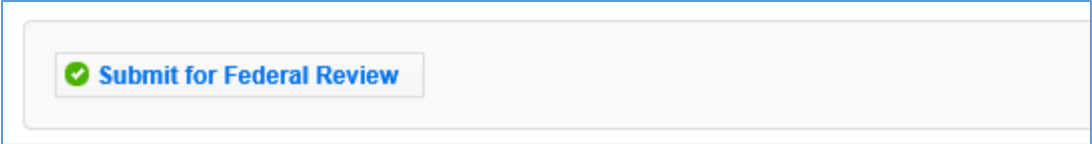
Note: *The submission button is only be visible if you already have a Director Signature and you are working on an Annual Update or making edits to a plan that was sent back "Needs Revision". If a Director Signature is required, the user will not have access to the submit button and should not have to click the submit button to submit for Federal Review; the plan is submitted automatically when the Director clicks the "approve" option (see Request Director Signature section for more information).*

4. Click **OK** to submit the plan or **Cancel** to cancel the submission.

If your submission was successful, you will receive an EFNEP Alert that your submission was successful and you will be returned to the **Manage Annual Update/5-Year Plan** screen.

EFNEP Alert
Annual Update successfully submitted
Federal Test Institute
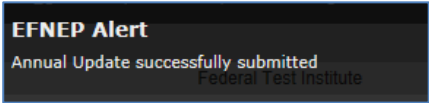
Note: *Sometimes the alert message is quick, if you don't see it, move on to step 5. If you your status is still "**Draft**", return to step 2 and try again!*

If your submission failed, you will get a red EFNEP Error alert message in the top right corner of your screen and a list of **Submission Errors**. The submission errors represent required fields (any outlined in red within your plan) that are incomplete. These must be fixed before you can successfully submit your plan.

<< Back | Home >> Manage Annual Updates >> Edit Annual update >> Annual Update Errors

EFNEP Error
Your Annual Update is incomplete and cannot be submitted, please address the following errors

Submission Errors
Situation Section: Situation is empty
Situation Section: Description of geographic area is empty
Situation Section: Target audience is empty
Priorities Section: You must select at least 3 priorities
Priorities Section: You must select at least 2 priorities with core area selected
Other Inputs Section: Curricula is empty
Other Inputs Section: You must define a relationship for each Agency, Organization or Other Partner in the Inter-Organizational Relationship Chart
Delivery Sites and Partnerships Section: You must enter a value for Delivery Sites/Locations and Community Partnerships Chart
Delivery Sites and Partnerships Section: Output description is empty

5. To fix submission errors, review and make note of items that need to be fixed.
6. Click "**Edit Annual update**" on the breadcrumb trail to return to your plan.
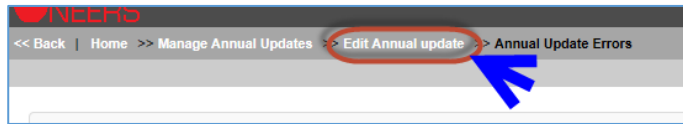
7. Click on the section(s) with the error(s)and make corrections.
8. Scroll to the bottom and click "**Submit for Federal Review"**. If the submission fails again, complete these steps again.
9. After you submit, confirm your **Status** is "**Pending**" on the **Manage Annual Update/5-Year Plan** screen.

    a. Use the " 🔍 " icon to preview the plan you submitted.

    b. Use the " 🗗 " icon to duplicate your plan.

Note: *The "❌" icon will only be visible if the plan has not been submitted. If you need to delete a plan that was submitted, you will need to cancel the submission first (see below for instructions).*
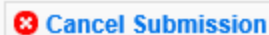
Tip: If you notice a mistake before the Federal Office begins its review, you can make edits within the plan and save them. All saved changes to a "**Pending**" plan are automatically visible to the Federal Office after you save.

Cancel Annual Update/5-Year Plan Submission

If your Annual Update/5-Year Plan has a status of "**Pending**", you can cancel the submission.

WebNEERS Instructions

1. From the **Manage Annual Update/5-Year Plan** screen, click the " 🔍 " icon.
2. Scroll to the bottom and click **Cancel Submission.**

3. Watch for an alert message at the top right confirming that it was successful.
4. Make edits to your plan as needed.
5. When you are done, click **Submit for Federal Review** to resubmit your plan.
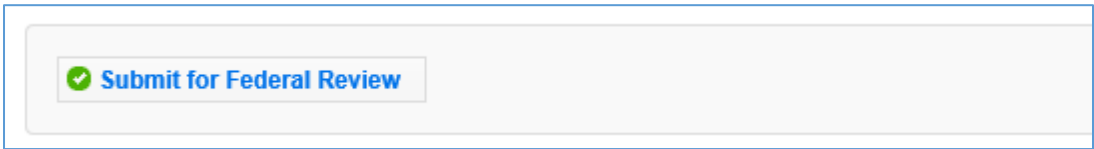
 The **Cancel Submission** button will only be visible if the plan is still "**Pending**"; you cannot cancel a submission if the status is "**Under Review**", "**Needs Revision**" or "**Approved**".

Revise and Resubmit Annual Update/5-Year Plan

Plan Marked "Needs Revision"

If your Annual Update/5-Year Plan submission is marked as "**Needs Revision**", you need to determine the issue(s) with your plan, make revisions, and resubmit.

WebNEERS Instructions

1. From the **Manage Annual Update/5-Year Plan** screen, click the " 🔍 " icon to open your plan.
2. Note which sections are locked and which aren't. Example:

	<u>Locked Sections</u> are approved. No further action is needed. If you need to make revisions, you can unlock the section (see **Plan Marked "Approved"** section for instructions), but if you do so, the section will have to undergo another review by the Federal Office for approval.
	<u>Unlocked Sections</u> need revision. To see why, click the " 💬 Comments " button on the top right of the main plan page and review the Federal Comments.

3. On sections that are unlocked, make revisions based on the Federal Comments.
   a. If needed, click the " 💬 Comments " button to add a response or additional information.

b. Enter a comment explaining the change and click the **Add Comment** button to add the comment. After doing so, it will look like this:
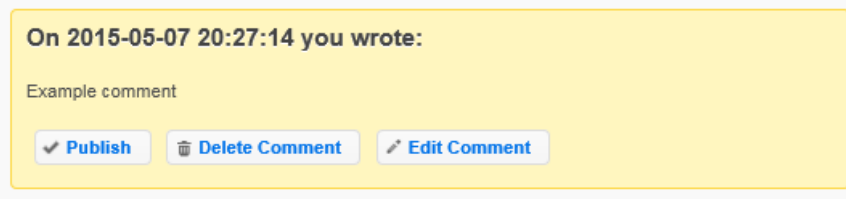
4. Click **Publish** to make the comment visible to the Federal level upon submission.
5. Click **Delete Comment** to delete the comment.
6. Click **Edit Comment** to edit the comment.

Note:

*Only published comments are visible at the Federal level. If you publish a comment by mistake, you can click **Unpublish**. This will keep the comment, but make it invisible to the Federal level upon submission.*

7. Click the "**x**" on the top right of the pop-up to close the **Comments** section/return to your plan.
8. Make sure you click **Publish** to make your comment visible to the Federal reviewer.
9. Scroll to the bottom and click **Submit Revisions for Federal Review** to resubmit your revisions.
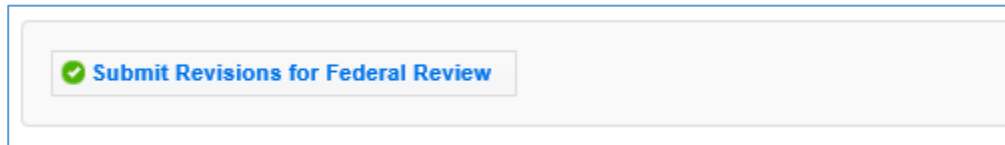
10. Click **OK** to resubmit the plan or **Cancel** to cancel the resubmission. If your resubmission fails, follow the instructions in the **Submit Annual Update/5-Year Plan for Federal Review** section to make corrections and resubmit.

Plan Marked "Approved"

If your Annual Update/5-Year Plan submission is marked as "**Approved**", but you need to make a change, you have to unlock the section you need to modify, make revisions, and resubmit.

See additional notes below.

Note:

*Modifying an "**Approved**" plan will create a clone of the plan; you cannot edit a plan that has been approved by the Federal Office. You are essentially creating a new one.*

WebNEERS Instructions

1. From the **Manage Annual Update/5-Year Plan** screen, click the " 🔍 " icon to open your "**Approved**" plan.

2. Open the section you need to modify and click the " Locked 🔒 " button at the top of the screen.

3. Click **OK** on the warning message to confirm that you want to unlock/edit the section.

4. Click **Cancel** to cancel the action and keep the section locked.

5. Make any edits you need to make.

6. Click **Save** to save and close this section, **Cancel** to close the section without saving, or **Save and Next** to save this section and automatically advance to the next section.

7. Click **OK** to confirm the changes and to create a cloned copy of your plan. The cloned plan will have the same file name, but " - cloned on xx/xx/xxxx" is appended to it.

8. Make any additional edits.

9. Click on the " 💬 Comments " button on the top right.

10. Enter a comment explaining the change in the **Add Comment** field.

11. Click the "**Add Comment**" button to add the comment. After doing so, it will look like this:

On 2015-05-07 20:27:14 you wrote:

Example comment

✔ Publish   🗑 Delete Comment   ✏ Edit Comment
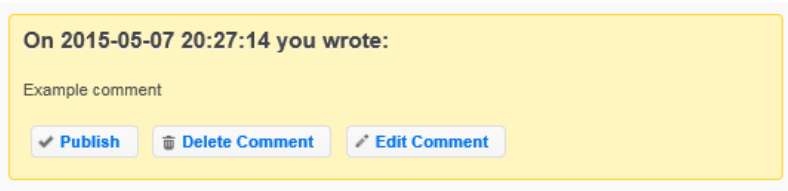
12. Click **Publish** to make the comment visible to the Federal level upon submission.

13. Click **Delete Comment** to delete the comment.

14. Click **Edit Comment** to edit the comment.

Note:

*Only published comments are visible at the Federal level. If you publish a comment by mistake, you can click **Unpublish**. This will keep the comment, but make it invisible to the Federal level upon submission.*

15. Click the "**x**" on the top right of the pop-up to close the **Comments** section/return to your plan.
16. Scroll to the bottom and click "**Submit for Federal Review.**"

17. Click "**OK**" to submit the plan or "**Cancel**" to cancel the submission.

✅ Submit for Federal Review
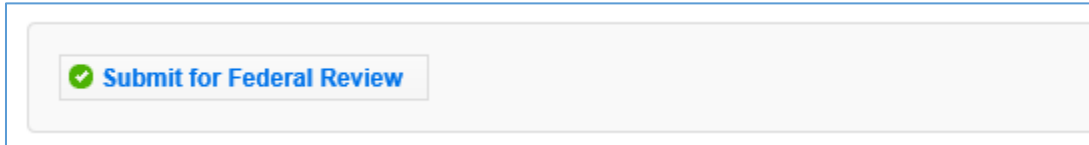
Create New Plan

WebNEERS Instructions

1. Log in as an <u>Institution Level</u> user.
2. Select "**Manage Annual Update/5-Year Plan**" from the *WebNEERS Home Page.*
3. Click **Add New Plan** to create a new Annual Update/5-Year Plan file.
4. Enter a **Plan Name** *(example "Clemson University Annual Update").*
5. Enter the appropriate **Fiscal Year** – *format = YYYY.*
6. Enter the **First Name** and **Last Name** of the Program Contact – *typically this is the Program Coordinator.*
7. Enter the **Phone Number, Fax Number, Email Address** and **Program Website** for the person listed as the Program Contact (optional).
8. Enter the **First Name** and **Last Name** of the Extension Director or Extension Administrator.
9. Click Save to create the plan or Cancel to return to the Manage Annual Update/5-Year Plan screen without saving.

Note: *You can create multiple plans, if needed, but you should only submit one to the Federal Office.*

Clone an Annual Update/5-Year Plan

The clone option allows users to duplicate or make a copy of a plan without having to retype all the information. It maintains the lock/unlocked status of each section. This option will not move the plan into the new reporting year. To do so, use the **Migration Steps** above to migrate your plan.

WebNEERS Instructions

1. Log in as an <u>Institution Level</u> user.
2. Select "**Manage Annual Update/5-Year Plan**" from the *WebNEERS Home Page.*

3. Locate the plan you want to make a copy of and click the " 🗗 " icon.
4. Click "Ok" to create a duplicate copy of your plan or "Cancel" if you intended to migrate your plan, not duplicate it. The duplicate plan will be listed on your **Manage Annual Update/5-Year Plan** screen and will have "- Cloned on DD/MM/YYYY" appended to the plan name.
5. Use the " 🔧 " icon to edit your cloned plan or the " 🔍 " icon to preview your cloned plan.

Note: *You will see either the edit or the preview icon. The edit icon is only visible if the cloned plan has not been submitted to the Federal Office. If the cloned plan has been submitted, the preview icon will be visible.*

6. Use the " 🗗 " icon to duplicate your cloned plan.
7. Use the " ❌ " icon to delete your cloned plan.

Note: *The delete icon will only be visible if the plan has not been submitted; you cannot delete a plan if it has been submitted to the Federal Office.*

Manage Delivery Sites and Community Partnerships

The **Manage Delivery Sites and Community Partnerships** screen includes all Regional Level and Institution Level Delivery Site and Community Partnership records. There is only one record per region, but the Institution Level can add as many records as needed.

WebNEERS Instructions

1. Log in as an Institution Level user.
2. Select "**Manage Delivery Sites and Partnerships**" from the *WebNEERS Home Page.*
3. Click **Add Institute Level Delivery Site and Partnership Record** to create an Institution Level record.
4. Enter the required data (see *Region Level Instructions* for details).
5. Click "**Save**" to save the record or "**Cancel**" to cancel without saving.
6. Use the " ❌ " icon to delete your record.
7. Use the " 🔧 " icon to edit your record or the " 🔍 " icon to preview the record.

Note: *You will see either the edit or the preview icon. The edit icon will only be visible if the record is not associated with a plan that was submitted to the Federal Office. If the record has been submitted, the preview icon will be visible.*

8. For <u>Region Level</u> records, use the " 🔍 " icon to preview the record.
9. If the data is incorrect, contact the region and have them log into the system and make updates. As soon as they save their changes, they will be visible to you!
   See additional notes below.

Note: *<u>Institution Level</u> users cannot edit <u>Region Level</u> records. Within the Annual Update/5-Year Plan the data can be manipulated, but it will not change the original record. If you want the actual record to be accurate, the <u>Region Level</u> user must make the changes in their system.*

Edit Program Delivery Sites and Partnerships – Region Level

The Edit Program Sites and Partnerships reports on the locations at which programming occurs and the partnerships which are formed in the communities.

Tip: *There is only one Delivery Sites and Partnerships screen per region. This means the data for all <u>Region level</u> users is captured in the same place. It is advised that one person per region be responsible for aggregating and entering this data so that data is accurate and edits are not inadvertently overridden.*

1. Select **Edit Delivery Sites and Partnerships** from the *WebNEERS Home page.*
2. In the first column, enter the region's total **# of Different Program Delivery Sites/Locations**.

Note: *It is important to record each site only one time under the "# of Different Program Delivery Site/Locations". This section does not record the number of different activities provided at sites.*

3. In the second column, enter the total **# of Community Partnerships** for the region.

Note: *Community Partnerships are local or community-based organizations the university or institution is working with to meet programmatic goals. The relationship should be mutually beneficial and may be formal or informal in nature. They can include networking, cooperating, coordinating, partnerships, forming coalitions or collaborating.*

4. Click "Add Other" to add an additional location to the chart.

Note: *Specific details about items added under "Other" are not be visible at the <u>Institute level</u>, but will be aggregated with any other "Other" items added by other regions.*

See screenshot below.

Figure 5: Delivery Sites and Community Partnerships Chart

Delivery Sites / Locations and Community Partnerships:

For applicable types of delivery sites/locations below, indicate the number of sites reached and the number of community partnerships

Types of Sites/Locations	# of Different Program Delivery Sites/Locations	# of Community Partnerships (?)
Adult Education & Training Sites	0	0
Adult Recreation Centers	0	0
Churches	0	0
Community Centers	0	0
Emergency Food Assistance Sites	0	0
Extension Offices	0	0
Farmers Markets	0	0
Food Stores	0	0
Head Start Sites	0	0
Health Care Sites	0	0
Libraries	0	0
Other Youth Education Sites	0	0
Public Housing	0	0
Schools	0	0
Shelters	0	0
SNAP Offices	0	0
WIC Program Sites	0	0
Worksites	0	0

+ Add Other

Manage Program Impacts

The **Manage Program Impacts** screen includes all <u>Regional Level</u> and <u>Institution Level</u> Program impacts. Regional impacts are only visible at the <u>Institution Level</u> if the "Submit for Institution Use" box is checked at the <u>Regional Level</u> (note, this box is checked by default). The **SEARCH** box can be used to quickly find examples by their title, type, submitter, keywords, people, focus, or date. <u>Institution Level</u> users can edit Regional impacts, if needed. Those changes will be visible to the <u>Regional Level</u> user.

SEARCH: [   ]

WebNEERS Instructions

1. Log in as an <u>Institution Level</u> user.
2. Select "**Manage Program Impacts**" from the *WebNEERS Home Page.*
3. Click **Add Program Impact** to create an <u>Institution Level</u> impact.
4. Select **Program Impact** (individual level) from the dropdown.
5. Click **Save** to create the impact or **Cancel** to cancel the impact.
6. Enter the required data (see ***Region Level Instructions*** for details).
7. Click **Save** to save the impact or **Cancel** to cancel without saving.

8. For <u>Region Level</u> impacts/examples, use the " 🔧 " icon to preview/edit the impact or the " 🔍 " icon to preview the impact. <u>Institution Level</u> users can make edits to <u>Region Level</u> impacts/examples and those edits become visible to all users after they are saved.

Note: *You will see either the edit or the preview icon. The edit icon will only be visible if the impact is not associated with a plan that was submitted to the Federal Office. If the impact has been submitted, the preview icon will be visible.*

9. If needed, use the " ❌ " icon to hide <u>Region</u> or <u>Institution Level</u> impacts or examples from your view.

Note: *The " ❌ " icon will only be visible if the impact has not been submitted; you cannot hide an impact if it has been submitted to the Federal Office.*

10. If you hide an example by mistake, click the **View Hidden Program Impacts** button.

🔍 View Hidden Program Impacts

11. Click the " ✔ " icon to unhide the impact.

12. Click the **View Active Program Impacts** button to return to the list of active impacts.

🔍 **View Active Program Impacts**
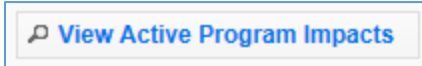
Add Program Impacts – Region Level

The Manage Program Impacts section collects the qualitative information (success stories) of the program.

1. Select **Manage Program Impacts** from the *WebNEERS Home page.*
2. Select **Program Impact** (individual level) from the dropdown.
3. Click **Save** to create the impact or **Cancel** to cancel the impact.
4. Enter a **Title** for the program impact (be specific).
5. Indicate the **Date Occurred.**
    a. Type manually as MM/DD/YYYY or
    b. Select the Calendar Icon (📅) and choose the correct date.
5. Leave checked, to submit, or uncheck to remove the program impact from the Institute level user's view.
6. Indicate the **Core Area(s)** of the impact.

Note:

> *More than one **Core Area** can be selected.*

7. Indicate the **Secondary Area(s)** of the impact.

Note:

> *More than one **Secondary Area** can be selected.*

Note:

> *Additional Areas can be added by clicking "Add Focus" if the list does not provide an adequate description of the area on which the program impact reflects.*

8. Indicate the **Key Word(s)** that describe the program impact.

Note:

> *Additional Key Words can be added by clicking "Add Keyword" if the list does not provide adequate options.*

9. Indicate the **People** who were involved in facilitating the program impact.

Note: *More than one category of "**People**" can be selected.*

Note: *Additional People can be added by clicking "Add People" if the list does not provide adequate options.*

10. Type the **Background** of the program impact.

*The background is to: Provide a brief narrative description of the circumstances prior to program involvement and the actions, activities or project milestones that took place during the program that led to the outcomes/impacts. Be clear who is telling the story and include quotation marks where appropriate. **Do not use names or personally identifiable information.** Include any external factors or assumptions that may have influenced the story. (2000 characters or less)*

11. Type the **Outcomes/Impacts.**

*The Outcomes/Impacts section is to: Provide a brief narrative description of the direct benefits or indirect/unintended consequences which occurred as a result of participation in the program. As above, be clear who is telling the story and include quotation marks where appropriate. **Do not use names or personally identifiable information.** The description should demonstrate the need for the program and should describe how participation affected those involved. It may reference benefits at the individual, community, or social level. (2000 characters or less)*

12. Select **Save** when the Program Impact has been added.

Note: *WebNEERS does not "spell check" or "grammar check" – it is recommended that the user type the Background and Outcomes/Impacts into a word processor (such as Microsoft Word) prior to adding to WebNEERS to ensure the submission of a program impact that is complete, accurate, and reflects well upon the Region.*

Tip: Selecting accurate and appropriate Focus Areas, Key Words and People will allow Region and Institute level users to quickly find relevant Program Impacts. These items are all available as

searchable terms on the Manage Program Impacts page and therefore can be used to quickly locate a relevant anecdote should a request from a stakeholder, partner or supervisor be received.

Review and Edit the Program Impacts

1. Select **Manage Program Impacts** from the *WebNEERS Home page.*

2. Select the *Wrench icon (* *)* to the left of the **Program Impact** statement to be reviewed.
3. Review the information and make edits as needed:
     i. Ensure the correct boxes have been selected for **Focus Areas, Key Words, and People.**
     ii. Read the **Background** and **Outcomes/Impacts** sections for content and meaning. Ensure that the information is presented in a clear, concise and meaningful way, answering the questions being asked and providing the short and medium term outcomes expected in programming.
4. Select **Save** when the review and any necessary edits have been completed.
   See screenshot below.

Figure 6: Program Impact Data Entry Screen

Program Impact

Title

[   ]

Date Occurred

[12/21/2012] 📅

☑ Submit for Institute Use

Focus Areas

Please select which areas this program impact relates to. Select all that apply:

Core Areas
- ☐ Diet Quality
- ☐ Physical Activity
- ☐ Food Resource Management
- ☐ Food Safety
- ☐ Food Security

Secondary Areas
- ☐ Family/Interpersonal Relationships
- ☐ Management/Leadership
- ☐ Sectors of Influence
- ☐ Environmental Settings

➕ **Add Focus**

Key Words

Select any of the following key words that apply to the program impact. Select all that apply:

- ☐ Disease Prevention
- ☐ Weight Management
- ☐ Personal Growth/Confidence
- ☐ Positive Impact on Family
- ☐ Improved Overall Health

➕ **Add Keyword**

People

Select the people involved in the program impact story. Select all that apply:

Staff
- ☐ Paraprofessional
- ☐ Professional
- ☐ Volunteer
- ☐ Coordinator
- ☐ Partner/Collaborator

Participant
- ☐ Adult
- ☐ Pregnant Teen
- ☐ Youth

➕ **Add Person**

Background

Provide a brief narrative description of the circumstances prior to program involvement and the actions, activities or project milestones that took place during the program that led to the outcomes/impacts. Be clear who is telling the story and include quotation marks where appropriate. Do not use names or personally identifiable information. Include any external factors or assumptions that may have influenced the story. (2000 characters or less)

[   ]

Outcomes/Impacts

Provide a brief narrative description of the direct benefits or indirect/unintended consequences which occurred as a result of participation in the program. As above, be clear who is telling the story and include quotation marks where appropriate. Do not use names or personally identifiable information. The description should demonstrate the need for the program and should describe how participation affected those involved. It may reference benefits at the individual, community, or social level. (2000 characters or less)

[   ]

Manage Community Partnership Impacts

The **Manage Community Partnership Impacts** screen includes all <u>Regional Level</u> and <u>Institution Level</u> community level impacts. Regional impacts are only visible at the <u>Institution Level</u> if the "Submit for Institution Use" box is checked at the <u>Regional Level</u> (note, this box is checked by default). The **SEARCH** box can be used to quickly find examples by their title, type, submitter, keywords, people, focus, or date. <u>Institution Level</u> users can edit Regional impacts, if needed. Those changes will be visible to the <u>Regional Level</u> user.

SEARCH:

WebNEERS Instructions

1. Log in as an <u>Institution Level</u> user.
2. Select "**Manage Community Partnership Impacts**" from the *WebNEERS Home Page.*
3. Click **Add Community Partnership Impact – Policy, Systems, and Environmental Change** to create an <u>Institution Level</u> impact.
4. Indicate the **Title of the Community Partnership Impact**.
   a. An example title may be the name of the agency or the Policy, Systems or Environmental Change effort.
5. Identify the **Focus Area** of the Community Partnership Impact
   a. Diet Quality
   b. Physical Activity
   c. Food Resource Management
   d. Food Safety
   e. Food Security
6. Select the **Congressional Districts**

Note: *Select all congressional districts being impacted and/or affected by the community partnership impact.*

7. Identify the **Type** of the Community Partnership Impact
   a. Environmental Settings
   b. Sectors of Influence
8. Identify the **Participant Type** of the Community Partnership Impact
   a. Adult
   b. Youth
   c. Pregnant Teen
9. Identify the **Term** of the Community Partnership Impact
   a. Short
   b. Medium
   c. Long

10. Identify the **Stage** of the Community Partnership Impact
    a. Planning
    b. Maintenance
    c. Evaluation
11. Identify the **Delivery Sites and Partnerships** of the Community Partnership Impact
    a. Adult Education & Training Sites
    b. Adult Rehabilitation Centers
    c. Churches
    d. Community Centers
    e. Emergency Food Assistance Sites
    f. Extension Offices
    g. Farmers Markets
    h. Food Stores
    i. Head Start Sites
    j. Health Care Sites
    k. Libraries
    l. Other Youth Education Sites
    m. Public Housing
    n. Schools
    o. Shelters
    p. SNAP Offices
    q. WIC Program Sites
    r. Worksites
12. Enter the **Narrative** of the Community Partnership Impact (5,000 characters or less)
    Community partnership impacts describe work at the community level. Indicate the partners (i.e., non-profits, universities, private organizations or industry groups) involved in the community level success. Clearly state how the work of your program drove a community action, the potential or demonstrated benefit in EFNEP core areas, and how the work improved the lives of limited resource audiences. Quantitative examples are the most effective (e.g., pounds of food, servings of fruits and vegetables, dollars of food costs saved, dollars of health care costs saved, etc.) Tie the community partnership impact to EFNEP's purpose (i.e., improved nutritional wellbeing, improved food and physical activity environments, and personal development of low-income populations) and USDA Strategic Goals (https://www.usda.gov/our-agency/about-usda/strategic-goals).
13. Click **Save** to save the impact or **Cancel** to cancel without saving.

14. For Region Level impacts/examples, use the " 🔧 " icon to preview/edit the impact or the " 🔍 " icon to preview the impact. Institution Level users can make edits to Region Level impacts/examples and those edits become visible to all users after they are saved.

Note:

You will see either the edit or the preview icon. The edit icon will only be visible if the impact is not associated with a plan that was submitted to the Federal Office. If the impact has been submitted, the preview icon will be visible.

15. If needed, use the "⊗" icon to hide <u>Region</u> or <u>Institution Level</u> impacts or examples from your view.
    See additional notes below.

Note: *The "⊗" icon will only be visible if the impact has not been submitted; you cannot hide an impact if it has been submitted to the Federal Office.*

16. If you hide an example by mistake, click the **View Hidden Community Partnership Impact – Policy, Systems, and Environmental Change** button.

    🔎 View Hidden Community Partnership Impact - Policy, Systems and Environmental Change

17. Click the "✓" icon to unhide the impact.
18. Click the **View Community Partnership Impact – Policy, Systems, and Environmental Change** button to return to the list of active impacts.

    🔎 View Community Partnership Impact - Policy, Systems and Environmental Change

Add Community Partnership Impacts – Region Level

The Manage Community Partnership Impacts section collects qualitative information (Policy, Systems, and Environmental Change efforts) of the program.

1. Select **Manage Program Impacts** from the *WebNEERS Home page.*
2. Select "**Manage Community Partnership Impacts**" from the *WebNEERS Home Page.*
3. Click **Add Community Partnership Impact – Policy, Systems, and Environmental Change** to create a <u>Region Level</u> impact.
4. Indicate the **Title of the Community Partnership Impact**.
   a. An example title may be the name of the agency or the Policy, Systems or Environmental Change effort.
5. Identify the **Focus Area** of the Community Partnership Impact
   a. Diet Quality
   b. Physical Activity
   c. Food Resource Management
   d. Food Safety
   e. Food Security
6. Select the Congressional Districts

Note: *Select all congressional districts being impacted and/or affected by the community partnership impact.*

7. Identify the **Type** of the Community Partnership Impact
   a. Environmental Settings
   b. Sectors of Influence

8. Identify the **Participant Type** of the Community Partnership Impact
   a. Adult
   b. Youth
   c. Pregnant Teen
9. Identify the **Term** of the Community Partnership Impact
   a. Short
   b. Medium
   c. Long
10. Identify the **Stage** of the Community Partnership Impact
    a. Planning
    b. Maintenance
    c. Evaluation
11. Identify the **Delivery Sites and Partnerships** of the Community Partnership Impact
    a. Adult Education & Training Sites
    b. Adult Rehabilitation Centers
    c. Churches
    d. Community Centers
    e. Emergency Food Assistance Sites
    f. Extension Offices
    g. Farmers Markets
    h. Food Stores
    i. Head Start Sites
    j. Health Care Sites
    k. Libraries
    l. Other Youth Education Sites
    m. Public Housing
    n. Schools
    o. Shelters
    p. SNAP Offices
    q. WIC Program Sites
    r. Worksites
12. Enter the **Narrative** of the Community Partnership Impact (5,000 characters or less)
    Community partnership impacts describe work at the community level. Indicate the partners (i.e., non-profits, universities, private organizations or industry groups) involved in the community level success. Clearly state how the work of your program drove a community action, the potential or demonstrated benefit in EFNEP core areas, and how the work improved the lives of limited resource audiences. Quantitative examples are the most effective (e.g., pounds of food, servings of fruits and vegetables, dollars of food costs saved, dollars of health

care costs saved, etc.) Tie the community partnership impact to EFNEP's purpose (i.e., improved nutritional wellbeing, improved food and physical activity environments, and personal development of low-income populations) and USDA Strategic Goals (https://www.usda.gov/our-agency/about-usda/strategic-goals).

13. Click **Save** to save the impact or **Cancel** to cancel without saving.

14. For Region Level impacts/examples, use the " 🔧 " icon to preview/edit the impact or the

" 🔍 " icon to preview the impact.
See additional notes below.

Note: *You will see either the edit or the preview icon. The edit icon will only be visible if the impact is not associated with a plan that was submitted to the Federal Office. If the impact has been submitted, the preview icon will be visible.*

15. If needed, use the " ❌ " icon to hide Region Level impacts or examples from your view.

Note: *The " ❌ " icon will only be visible if the impact has not been submitted; you cannot hide an impact if it has been submitted to the Federal Office.*

16. If you hide an example by mistake, click the **View Hidden Community Partnership Impact – Policy, Systems, and Environmental Change** button.

🔍 View Hidden Community Partnership Impact - Policy, Systems and Environmental Change

17. Click the " ✔ " icon to unhide the impact.

18. Click the **View Community Partnership Impact – Policy, Systems, and Environmental Change** button to return to the list of active impacts.
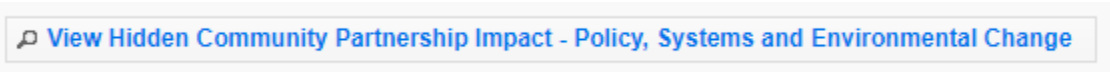
🔍 View Community Partnership Impact - Policy, Systems and Environmental Change

See screenshot below.

Figure 6: Community Partnership Impact Data Entry Screen

Community Partnership Impact - Policy, Systems and Environmental Change

Title

Focus Areas

Please select which areas this program impact relates to. Select all that apply:

Core Areas
- ☐ Diet Quality
- ☐ Physical Activity
- ☐ Food Resource Management
- ☐ Food Safety
- ☐ Food Security

Congressional Districts

Please select the congressional districts involved in the community partership impact. Select all that apply:

- ☐ 1
- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5

Type
- ○ Environmental Settings
- ○ Sectors of Influence

Participant Type
- ○ Adult
- ○ Youth
- ○ Pregnant Teen

Term
- ○ Short
- ○ Medium
- ○ Long

Stage
- ○ Planning
- ○ Maintenance
- ○ Evaluation

Delivery Sites and Partnerships
- ☐ Adult Education & Training Sites
- ☐ Adult Rehabilitation Centers
- ☐ Churches
- ☐ Community Centers
- ☐ Emergency Food Assistance Sites
- ☐ Extension Offices
- ☐ Farmers Markets
- ☐ Food Stores
- ☐ Head Start Sites
- ☐ Health Care Sites
- ☐ Libraries
- ☐ Other Youth Education Sites
- ☐ Public Housing
- ☐ Schools
- ☐ Shelters
- ☐ SNAP Offices
- ☐ WIC Program Sites
- ☐ Worksites

Narrative

Narrative Description (5000 characters or less)

B *I* <u>U</u> ABC | ↶ ↷ | ✨ | ☰ ☰

Cancel Save

Appendix 1 – Environmental Settings Indicators

Short Term Indicators

Short Term Indicators

Organizations and Communities gain awareness, knowledge, and/or interest.

	Diet Quality	Physical Activity	Food Resource Management	Food Safety	Food Security
Hold discussions to identify challenges and opportunities for low-income populations that can be addressed from a community context.	☐	☐	☐	☐	☐
Commit to collaborate to address identified needs.	☐	☐	☐	☐	☐
Conduct needs assessment to determine the extent of concern and potential for resolution.	☐	☐	☐	☐	☐
Form partnerships or coalitions.	☐	☐	☐	☐	☐

Medium Term Indicators

Medium Term Indicators

Organizations and Communities commit to change.

DIET QUALITY	PHYSICAL ACTIVITY	FOOD RESOURCE MANAGEMENT	FOOD SAFETY	FOOD SECURITY

- ☐ Partnership/Coalition adopts a written plan that contains specific objectives and action steps for diet quality.

- ☐ Facilitate the use of more nutritious foods at organization and community events and programs, such as food fairs and public meetings.

- ☐ Expand nutrition education opportunities through schools, community education programs, and electronic media.

- ☐ Implement consistent messaging and/or local branding.

- ☐ Increase nutrition education referrals across programs and agencies.

- ☐ Develop access to Community Supported Agriculture shares.

- ☐ Reduce disparities in policies that encourage healthy eating.

- ☐ Change policies, practices, and physical environment of an organization (e.g., a workplace, health care setting, school/daycare, faith organization, restaurant, or other public eating site to support and improve the quality of foods offered.

⊕ Add Other

DIET QUALITY	**PHYSICAL ACTIVITY**	FOOD RESOURCE MANAGEMENT	FOOD SAFETY	FOOD SECURITY

☐ Partnership/Coalition adopts a written plan that contains specific objectives and action steps for physical activity.

☐ Expand opportunities for increased physical activity through planned organizational and community games, sports, programs, and competitions.

(?)

☐ Organize and implement neighborhood/community walking programs, gardens, etc.

☐ Reduce disparities to access and use of community sports and other physical activity programs.

☐ Change policies, practices, and/or physical environment of organizations and community settings (e.g. worksites, schools/daycares, city planning of businesses, neighborhoods, etc.) to increase daily physical activity.

⊕ **Add Other**

DIET QUALITY	PHYSICAL ACTIVITY	**FOOD RESOURCE MANAGEMENT**	FOOD SAFETY	FOOD SECURITY

☐ Partnership/Coalition adopts a written plan that contains specific objectives and action steps for food resource management.

☐ Establish grocery stores, farmers markets, and neighborhood/community gardens in low-income neighborhoods.

☐ Increase food resource management education through schools, faith organizations, worksites, community centers, and other public places.

(?)

☐ Change policies, practices, and/or physical environments of organizations (e.g. schools, community centers, faith organizations, and other public sites) to encourage family and community food production, preparation, and storage.

⊕ **Add Other**

DIET QUALITY	PHYSICAL ACTIVITY	FOOD RESOURCE MANAGEMENT	**FOOD SAFETY**	FOOD SECURITY

☐ Partnership/Coalition adopts a written plan that contains specific objectives and action steps for food safety.

☐ Establish a monitoring, evaluation, and prevention system based on a systematic preventative approach (such as HACCP) to improve food safety education for organizations and community partners that serve low-income individuals, families, and/or households.

☐ Conduct an audience appropriate social marketing campaign on family and community food safety in low-income communities.

⊕ **Add Other**

DIET QUALITY	PHYSICAL ACTIVITY	FOOD RESOURCE MANAGEMENT	FOOD SAFETY	**FOOD SECURITY**

☐ Partnership/Coalition adopts a written plan that contains specific objectives and action steps for food security.

☐ Increase donations of food, money, or volunteer time by people in the community to emergency food programs.

☐ Increase quantity and quality of foods in emergency food programs.

☐ Increase visibilty and access to non-emergency food assistance programs.

☐ Monitor changes in household and community food security, and the conditions that impact food security (such as unemployment and housing costs) in order to implement targeted programs.

☐ Facilitate increased support and involvement in community anti-hunger programs.

⊕ Add Other

Long Term Indicators

Long Term Indicators

Organizations and Communities experience improved conditions. A culture exists for resolving concerns and taking action at a multi-organization/community level.

DIET QUALITY	PHYSICAL ACTIVITY	FOOD RESOURCE MANAGEMENT	FOOD SAFETY	FOOD SECURITY

☐ Nutrient-dense foods are offered in schools, restaurants, grocery stores, farmers markets, worksites, food pantries, and other locations.

☐ Transportation infrastructures support access to grocery stores, farmers markets, food assistance offices, etc.

☐ School and worksite wellness policies have been developed and are implemented to provide healthier foods at school and worksite events, in vending machines, etc.

⊕ Add Other

| DIET QUALITY | **PHYSICAL ACTIVITY** | FOOD RESOURCE MANAGEMENT | FOOD SAFETY | FOOD SECURITY |

☐ A family-friendly physical activity environment exists as a result of the revitalization of existing parks, trails, playgrounds, and other means.

☐ Policies supporting increased physical activity at schools, worksites, and other public buildings are in place and are followed. (?)

☐ The community infrastructure includes safe walking paths, biking trails, and school routes, readily accessible bicycle racks, lighted stairwells, etc.

⊕ Add Other

| DIET QUALITY | PHYSICAL ACTIVITY | **FOOD RESOURCE MANAGEMENT** | FOOD SAFETY | FOOD SECURITY |

☐ Food deserts have been reduced or eliminated.

☐ Nutritious and affordable foods are more readily available where food is purchased (corner stores, grocery stores, supermarkets, gas stations, etc.)

☐ Food preparation education is a component of school standard requirements.

☐ Community members have sufficient food and water supplies and the skills to prepare and use such supplies in the event of an emergency or disaster.

⊕ Add Other

| DIET QUALITY | PHYSICAL ACTIVITY | FOOD RESOURCE MANAGEMENT | **FOOD SAFETY** | FOOD SECURITY |

☐ Food handling factors that negatively impact the safety of foods in a community (such as selling or distributing unsafe foods) have declined.

☐ Environmental factors that negatively affect the safety of foods in a community (such as contamination, residue, etc.) have declined.

☐ Foodborne illness outbreaks among low-income populations, especially those at increased risk, such as pregnant women and young children have declined.

⊕ Add Other

| DIET QUALITY | PHYSICAL ACTIVITY | FOOD RESOURCE MANAGEMENT | FOOD SAFETY | **FOOD SECURITY** |

☐	Emergency and non-emergency food assistance programs are well known and used, as needed.
☐	Emergency and non-emergency food assistance programs have sufficient healthy food resources.
☐	Information is available on selecting and preparing foods provided through emergency and non-emergency food sources for a healthy and adequate diet.
☐	Emergency and non-emergency systems coordinate efforts to increase access and participation.

⊕ **Add Other**

Appendix 2 – Sectors of Influence Indicators

Short Term Indicators

Short Term Indicators

Sector representatives identify and define social structure and policy relevant issues.

	Diet Quality	Physical Activity	Food Resource Management	Food Safety	Food Security
Participate in discussions with sector representatives regarding the potential impact of practices, structures, regulations, and policies on low-income audiences.	☐	☐	☐	☐	☐
Convene taskforces, expert committees, or advisory groups to determine the extent of concern and potential for resolution.	☐	☐	☐	☐	☐
Commit to collaborate and communicate within and across sectors to address identified needs and determine respective roles of responsibility.	☐	☐	☐	☐	☐

Medium Term Indicators

Medium Term Indicators

Sector representatives influence action.

DIET QUALITY	PHYSICAL ACTIVITY	FOOD RESOURCE MANAGEMENT	FOOD SAFETY	FOOD SECURITY

☐	Adopt an informed written plan that contains specific objectives and action steps for diet quality.
☐	Establish local or statewide food policy councils to inform key decision makers and to facilitate change across sectors of influence.
☐	Conduct social marketing campaigns that promote healthy eating environments.
☐	Communicate the respective actions taken by sectors of influence to improve diet quality and the public's response.
☐	Make healthier food options more available and accessible to low-income populations.
☐	Bring affordable grocery stores, farmers markets, etc. to low-income neighborhoods.
☐	Provide healthier food options at schools, daycares, worksites, universities, hospitals, faith organizations, social events, etc. (?)
☐	Adapt national initiatives to state and local situations.

⊕ Add Other

| | DIET QUALITY | PHYSICAL ACTIVITY | FOOD RESOURCE MANAGEMENT | FOOD SAFETY | FOOD SECURITY |

PHYSICAL ACTIVITY (tab selected)

☐ Adopt an informed written plan that contains specific objectives and action steps for physical activity.

☐ Adopt statewide policies for providing physical activity education in schools and daycares.

☐ Conduct social marketing campaigns that promote environments that support physical activity.

☐ Communicate the respective actions taken by sectors of influence to improve physical activity and the public's response.

☐ Work together to increase safe and affordable facilities for walking and bicycling, such as sidewalks, greenways, bike lanes, etc. that are accessible to low-income populations/neighborhoods.

☐ Adapt national initiatives to state and local situations.

⊕ **Add Other**

FOOD RESOURCE MANAGEMENT (tab selected)

Tabs: DIET QUALITY | PHYSICAL ACTIVITY | FOOD RESOURCE MANAGEMENT | FOOD SAFETY | FOOD SECURITY

☐ Adopt an informed written plan that contains specific objectives and action steps for food resource management.

☐ Use local or statewide food policy councils to inform key decision makers and to facilitate change across sectors of influence.

☐ Work together to improve food availability and food handling practices (purchasing, preparation, storage, etc.) (?)

☐ Develop social marketing campaigns that promote more resilient families and communities.

☐ Communicate the respective actions taken by sectors of influence to improve food resource management and the public's response.

☐ Adapt national initiatives to state and local situations.

⊕ **Add Other**

| DIET QUALITY | PHYSICAL ACTIVITY | FOOD RESOURCE MANAGEMENT | **FOOD SAFETY** | FOOD SECURITY |

☐	Adopt an informed written plan that contains specific objectives and action steps for food safety.
☐	Facilitate safer food practices by patrons and food handlers wherever food is offered.
☐	Develop social marketing campaigns that promote safer food handling environments.
☐	Communicate the respective actions taken by sectors of influence to improve food security and the public's response.
☐	Reinforce safer food handling at schools, daycares, worksites, universities, hospitals, faith organizations, social events, etc.
☐	Develop practices and policies to ensure safe food handling in local food service and temporary food service offerings (i.e. church dinners, fairs, etc.)
☐	Adapt national initiatives to state and local situations.

⊕ **Add Other**

| DIET QUALITY | PHYSICAL ACTIVITY | FOOD RESOURCE MANAGEMENT | FOOD SAFETY | **FOOD SECURITY** |

☐	Adopt an informed written plan that contains specific objectives and action steps for food security.
☐	Coordinate among emergency and non-emergency food assistance agencies and anti-hunger organizations, and with other sectors to improve program access and participation.
☐	Facilitate the availability of resources to efficiently and effectively support food security needs.
☐	Adapt national initiatives to state and local situations.

⊕ **Add Other**

Long Term Indicators

Long Term Indicators

Conditions improve within and across states.

DIET QUALITY | PHYSICAL ACTIVITY | FOOD RESOURCE MANAGEMENT | FOOD SAFETY | FOOD SECURITY

- ☐ Adequate age-appropriate food and nutrition education is available for all students K-12, statewide.

- ☐ State-sponsored events reflect a shift to offering more of nutrient-dense foods.

- ☐ Nutrient-dense foods are more readily available statewide where food is purchased/served.

- ☐ Smaller portions and lower-calories options are more readily available statewide where food is purchased/served.

⊕ **Add Other**

DIET QUALITY | **PHYSICAL ACTIVITY** | FOOD RESOURCE MANAGEMENT | FOOD SAFETY | FOOD SECURITY

- ☐ Adequate physical activity education is available to all students, K-12, statewide.

- ☐ Physical activity options for low-income populations are inviting, safe, and readily available, and are reinforced through zoning and land-use policies and practices.

- ☐ Non-motorized transit is supported through transportation policies and infrastructure development.

⊕ **Add Other**

DIET QUALITY | PHYSICAL ACTIVITY | **FOOD RESOURCE MANAGEMENT** | FOOD SAFETY | FOOD SECURITY

- ☐ Fruit and vegetable stands, farmers markets, etc. more readily available statewide in low-income areas through incentives, zoning, taxation and other policies and practices.

- ☐ Food deserts are reduced or eliminated through taxation and other incentives, zoning and land-use policies, etc.

- ☐ Food resource management education is broadly available through schools and adult learning programs.

⊕ **Add Other**

DIET QUALITY	PHYSICAL ACTIVITY	FOOD RESOURCE MANAGEMENT	**FOOD SAFETY**	FOOD SECURITY

☐ Public venues such as festivals and fairs use safe food handling practices.

☐ Food safety certification in food service establishments is more universally implemented.

☐ Hand washing facilities and hand sanitizers are more readily available and accessed wherever food is served.

⊕ Add Other

DIET QUALITY	PHYSICAL ACTIVITY	FOOD RESOURCE MANAGEMENT	FOOD SAFETY	**FOOD SECURITY**

☐ Coordination exists across food assistance programs for increased access and participation.

☐ Healthier foods are provided at food pantries and soup kitchens statewide.

⊕ Add Other

Appendix 3 – Clarifications of Plan Items

Selecting Indicators for Environmental Settings and Sectors of Influence

1. <u>SELECT APPROPRIATE INDICATORS</u> – "Checking" an indicator in WebNEERS is a judgement call. You should consider the context of your situation. Is the work a significant change or moving in a new direction? Is it expanding the scope or gaining traction toward a larger change? Is it representative of what is happening as a result of what the university or state/territory is doing – EFNEP and others working together? If so, then you should check off the related indicator. Overall, the intent is to show the work being done to support the greater good, not simply to check off as many items as you can.

2. <u>RECOGNIZE WORK ISN'T DONE IN ISOLATION</u> – Indicators for Environmental Settings and Sectors of Influence should not be work of a specific person or one group. Do not record results from the work of EFNEP alone, but from the combined efforts of EFNEP and others. This means items in this section may be reported to multiple stakeholders. The important thing is to consider whether EFNEP's voice is at the table in the actions that are taken and in the changes that are observed. If so, report it.

3. <u>PARAPROFESSIONALS SHOULD FOCUS ON DIRECT EDUCATION</u> – As mentioned at the National EFNEP Conference, EFNEP educators should continue to focus on direct education. The direct education is what gives EFNEP strength. It is the core of what we do, and legislatively, it is KEY to what makes our program distinct. If we lose it, we lose EFNEP.

4. <u>ASSURE STAFF THAT THEIR WORK IS CRITICALLY IMPORTANT</u> – Please make sure your staff know that the work that they do with families and youth is important and valued. Policy System and Environmental Change (PSE) work may have the potential to reach more people, but at this point, the true impact has not been confirmed. We want to build PSE work into what we do, but we do not want to dilute EFNEP. We need to make sure our educators understand the significance of what they do. As the research base and the definitions of PSEs evolve, we will continue to explore how best to reflect PSE changes within EFNEP. We are beginning with the role of professionals with respect to PSE.

Section 9: EFNEP Budget & Budget Justification

Add a New User to Handle Budget Requirements

Starting in FY2013, the EFNEP Budget and Budget Justification will be submitted through the Web-based Nutrition Education Evaluation and Reporting System (WebNEERS). If the person who prepares and submits this information is not a WebNEERS user, you can create an Institute Level account for him/her using the instructions below. Detailed instructions on users and permission management can be found in **Section 2: Users and Permission Management**.

<div style="background-color:red;color:white">
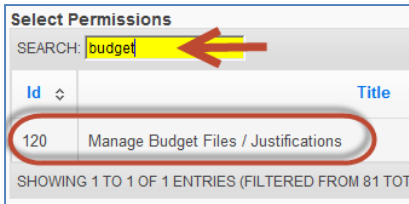
Create a New User

</div>

1. Log in as an Institute Level user
2. Select "**Add User**" from the *WebNEERS Home Page*
3. Enter the new user's **Email Address**
4. Create a **Verification Code**

> Note: *The verification code will need to be provided to the user in a separate email or alternative means of communication, as the email generated by WebNEERS will not provide the verification code. This is done to ensure the security of the system.*

5. Enter the user's **First Name**
6. Enter the user's **Last Name**
7. In the **User Type** drop down, select "**Institute**"
8. Determine the level of permissions you want the user to have and follow the instructions below

Create a user with full permissions	Create a user with restricted permissions
User has full capabilities; can access everything in the Institute Level System.	*User has restricted capabilities; cannot access anything except the budget section.*
1. Scroll to the bottom 2. Click "**Save**"	1. On the far right of the table, click the checkbox next to "**Select all**" twice to deselect (uncheck) every option in the Permissions table 2. Type "Budget" into the **SEARCH** box. This will bring up permission #120 – Manage Budget Files/Justifications

	3. Click the checkbox in the "**Select all**" column for permission #120 to select the permission 4. Delete the word "Budget" from the **SEARCH** box and confirm only permission #120 is selected. If not, repeat steps 1-3. 5. Scroll to the bottom 6. Click "**Save**"

Note: *You can also create a user who has custom designed permissions (has capabilities based on the permissions you select for them), but this is only recommended for advanced WebNEERS users.*

9. Click "**Save**" to create the new user or "**Cancel**" to exit without creating the new user.
10. Click "**OK**" to indicate that you are sure you want to create an INSTITUTE user or "**Cancel**" if you selected the "regional" user type by mistake.

The user will receive an email generated from the system with a link to register for WebNEERS. For detailed instructions on registration see *Section 2: Users and Permission Management*, the Approval Process for Users.

Example home screen for a user with Restricted Permissions:

Confirm Permissions

If you create a user with restricted permissions and want to make sure you did it correctly, follow these steps.

Note: *This can only be done <u>after</u> the user registers for the system; you cannot confirm permissions if registration is pending.*

1. Select "**View Users**" from the *WebNEERS Home Page*
2. Locate the user in the table and click the " ![wrench icon] " icon in the **Options** column next to his/her name
3. Click the "**RIGHTS**" tab to access his/her list of permissions
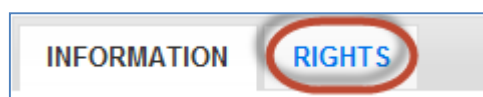
4. Scroll through the list of permissions and confirm that the "**Select All**" column only shows a checkmark next to permission(s) you selected. If you followed the instructions above to create a user with restricted permissions, only #120 should have a checkmark.
   a. If everything looks ok, click "**Cancel**" to exit the user's record without making any changes
   b. If something is wrong, check or uncheck permissions, as appropriate, and click "**Save**" to update the permissions. Saved changes will take effect immediately.

Create Budget Documents

Budget Sheet

1. Log in as an <u>Institute Level</u> user
2. Select "**Manage Budget Files / Justifications**" from the *WebNEERS Home Page*
3. In the **Create Budget Documents** section, click the "**BUDGET SHEET**" tab
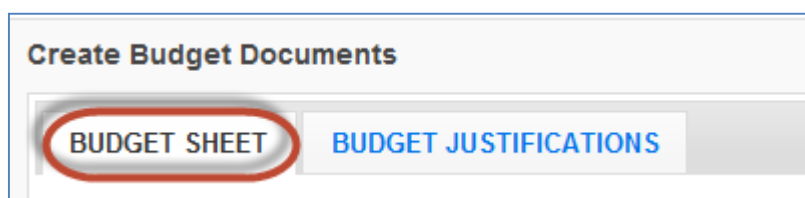
4. Click "**Download Budget Sheet**" to download the budget spreadsheet

5. Follow the instructions in **Appendix A** of this document to complete the budget justification
6. Use the checklist in **Appendix C** of this document to help you avoid common mistakes
7. After you have completed your budget, had it signed by your Extension Director or Administrator, and saved it as a PDF, click "**Upload New File**"

Note: *We recommend saving a copy of the editable budget spreadsheet in case revisions are needed.*

8. Use the **"Browse"** button to locate your PDF (must be 3MB or smaller)

ADD BUDGET FILE	
File Type	
Budget Sheet File:	[ ] Browse...
	Cancel Save

9. Select the file you wish to upload and click "**Open**"
10. Click "**Save**" and confirm that the file has been added to the table
    - Use the "🔍" icon to preview your file
    - Use the "❌" icon to delete your file
    -

Note: *The delete icon will only be visible if the file is not part of a submission; you cannot delete a file if it has been submitted to the Federal Office.*

Note: *You can upload multiple files, if needed, but you can only select one for submission.*

Budget Justification

1. Log in as an <u>Institute Level</u> user
2. Select "**Manage Budget Files / Justifications**" from the ***WebNEERS Home Page***
3. In the **Create Budget Documents** section, click the "**BUDGET JUSTIFICATIONS**" tab
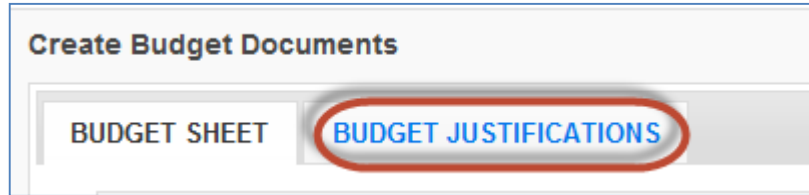
4. Use the instructions in **Appendix B** of this document to complete the budget justification

We <u>highly recommend</u> consulting the Budget Justification Instructions each time you complete your budget/justification to prevent you from having to revise your files after submission.

5. Click "**Add Budget Justification**" to create a new budget justification file
6. Create a **File Name** *(example "Clemson University Budget Justification")*
7. Enter the appropriate **Fiscal Year**
8. Enter narrative descriptions for each of the budget categories: **Salaries and Benefits, Travel, Equipment, Other Expenses, Other Sources of Funding, and Explanation of Carryover.** Be sure to follow the guidelines in the budget justification instructions.
   - Type your text directly into the text boxes or copy and paste text from another file
   - Use the formatting bar, found below each text box, to stylize your text, if desired

9. Use the checklist in **Appendix C** of this document to help you avoid common mistakes

10. Click "**Save**" and confirm that the file has been added to the table

- o Use the " ⚒ " icon to edit your file or the " 🔍 " icon to preview your file

Note: *You will see either the edit or the preview icon. The edit icon will only be visible if the file is not part of a submission. If the file is part of a submission, the preview icon will be visible. You can only preview the file after it has been submitted to the Federal Office.*

- o Use the " ⧉ " icon to duplicate your file
- o Use the " ⊗ " icon to delete your file

Note: *The delete icon will only be visible if the file is not part of a submission; you cannot delete a file if it has been submitted to the Federal Office.*

Note: *You can upload multiple files, if needed, but you can only select one for submission.*

Determine Submission Type

- **Preliminary Submissions** are based on the previous year's allocation. Select this submission type when you are working on your Annual Update, planning for the upcoming Fiscal Year, or responding to a request from the Federal Office to provide draft budget information.
- **Final Submissions** are based on the final allocation amounts for the fiscal year. Select this submission type when you have received a notification from the Federal Office that the Federal budget has passed and the final allocation amounts for EFNEP have been published.

Submit Budget Documents for Approval

Preliminary Submission

11. Select "**Manage Budget Files / Justifications**" from the *WebNEERS Home Page*
12. In the **Submit Budget Documents for approval** section, click the "**PRELIMINARY**" tab
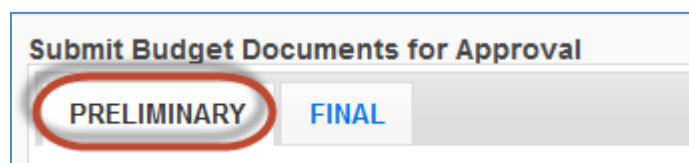
13. Click "**Create Preliminary Submission**"
14. Use the dropdown to select a "**Preliminary Budget File**" and a "**Preliminary Budget Justification**"

15. Enter any comments you have for the Federal Office in the "**Comments**" field or leave blank
16. Click "**Submit to Federal**" to submit the budget files to the Federal Office or click "**Cancel**" to cancel the submission
17. After you submit, confirm that the submission has been added to the table
    - Use the " 🔍 " icon to preview the names of the files and the comments you submitted
    - Use the " ⊗ " icon to cancel your submission
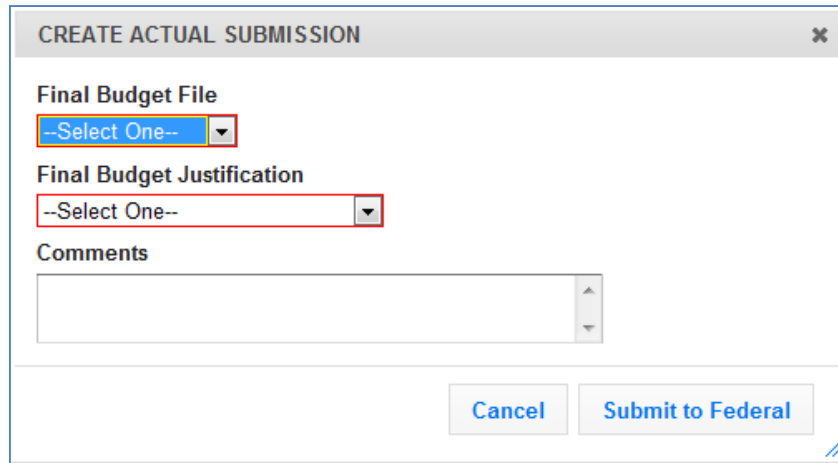
The delete icon will only be visible if the file is still "Pending Review"; you cannot cancel a submission if the status is "Under Review", "Needs Revision" or "Approved"

Final Submission

11. Select "**Manage Budget Files / Justifications**" from the *WebNEERS Home Page*
12. In the **Submit Budget Documents for approval** section, click the "**FINAL**" tab

13. Click "**Create Final Submission**"

14. Use the dropdown to select a "**Final Budget File**" and a "**Final Budget Justification**"

15. Enter any comments you have for the Federal Office in the "**Comments**" field or leave blank
16. Click "**Submit to Federal**" to submit the budget files to the Federal Office or click "**Cancel**" to cancel the submission.
17. After you submit, confirm that the submission has been added to the table
    a. Use the " " icon to preview the names of the files and the comments you submitted
    b. Use the " " icon to cancel your submission
    Note: You can only cancel a submission if the status is marked "Pending Review"

Understand 'Submission Status'

After you submit your Preliminary or Final Budget and Justification to the Federal Office, the status will be marked as one of the following:

- **Pending Review**: This status indicates that you have submitted your files, but the Federal Office has not reviewed them. While your submission is "Pending Review" you can still cancel your submission.
- **Under Review**: This status indicates that the Federal Office has begun reviewing your files. While your submission is "Under Revision" you cannot cancel your submission.
- **Incorrect Submission:** This status indicates that you submitted your files incorrectly. To see why, click on the " " icon and review the Federal comments. You will need to resubmit your files correctly (see below for resubmission instructions)
- **Needs Revision**: This status indicates that the Federal Office has reviewed your files and discovered one or more issues. To see what they are, click on the " " icon and

review the Federal comments. You will need to address the issues and resubmit your files (see below for resubmission instructions)

- **Approved**: This status indicates that the Federal Office has reviewed your files and has approved your Budget and Budget Justification. No further action is needed.

Resubmit Budget and/or Justification Files

If your Preliminary or Final submission "Needs Revision", you will need to review the comments from the Federal Office, revise your Budget and/or Justification based on those comments, and create/submit a new Preliminary or Final Submission.

- **Revise Budget**:
    1. Edit your Budget spreadsheet. If you cannot find your original file, download and complete a new Budget spreadsheet.
    2. Print the revised Budget sheet, have it signed, and save it as a PDF
    3. Upload the revised file into WebNEERS using the instructions in the "Create Budget Documents Section"

    Note: *If you do not need to revise your Budget sheet, you can attach the one you already have in WebNEERS to your submission. You do not need to create a new file.*

- **Revise Budget Justification:**
    1. Follow the instructions in the "Create Budget Documents Section" to create a new Budget Justification -or- click the " 🗐 " icon to duplicate your Budget Justification.
    2. If you duplicated your Budget Justification, make edits and save the revised file.

    Note: *If you do not need to revise your Budget Justification, you can attach the one you already have in WebNEERS to your submission. You do not need to create a new file.*

- **Resubmit:** Follow the steps in the "Submit Budget Documents for Approval" section to create a new Preliminary or Final Submission. Make sure you select your revised files!

Deadlines

The Budget and the Justification are due annually on the following schedule:

- **Preliminary Budget and Budget Justification:** Due November 1st on years an Annual Update is required, Due July 1st on years a 5-Year Plan is required (FY2016, FY2012, etc.). Preliminary budget information should be based on the previous year's allocation amount.

- **Final Budget and Budget Justification:** <u>Due 45 days after the final institution allocation amounts are published</u>. The deadline will vary from year to year. It may or may not coincide with the Capacity Request for Application (RFA). When allocation amounts are published, an announcement will go out over the NIFA listservs and will include the submission deadline. Final budget information should reflect the actual allocation amount for the fiscal year.

Appendix A: Budget Sheet Instructions

Open the Budget Sheet in Excel & Enter your State or Territory: cell C5

Enter your Institution: cell C6

Enter the Fiscal Year: cell E7

Enter Estimated Carryover: cell H5

Enter Current Allocation: cell H6

Total Funds Available will Calculate Automatically*: cell H7

*if total does not calculate automatically, enter the total amount

Review Budget Category Descriptions

- **Salaries & Benefits:** The number of staff and the breakdown of Full Time Equivalents (FTEs), salaries, and benefits.

- **Travel:** Funds used for local and out of state/territory travel. Expenses should be broken down by staff type. All travel expenses should relate to meeting EFNEP's goals.

- **Equipment:** Single items costing over $5000. Any piece of equipment costing less than $5000 should be included under "Other Expenses".

- **Other Expenses:** Expenses such as: materials and supplies; publications; curricula; computers; etc. Please also include any intentional carryover.

Enter Professional FTE*, Salary and Expenses: cells C14-G14

*FTE is Full Time Equivalent (FTE). One FTE = 2080 hrs. per year

Professional Total Amount will calculate automatically: cell H14

*if total does not calculate automatically, enter the total amount

Enter Paraprofessional FTE*, Salary and Expenses: cells C15-G15

*FTE stands for Full Time Equivalent. One FTE = 2080 hrs. per year

Paraprofessional Total Amount will calculate automatically*: cell H15

COOPERATIVE EXTENSION WORK SUMMARY BUDGET STATEMENT
Expanded Food and Nutrition Education Program (EFNEP)

State:				Estimated Carryover			
Institution:				Current Allocation			
Fiscal Year Ending: September 30,				Total Funds Available	$		-

COOPERATIVE EXTENSION WORK BUDGET BY OBJECT CLASSIFICATION

EFNEP Funding	Salaries		Additional Expenses		Other Expenses	Total Amount
	FTE	Amount	Travel	Equipment		
Professional						$ -
Paraprofessional/Technical						$ -
Clerical & Secretarial						$ -
TOTAL	0.0	$ -	$ -	$ -	$ -	$ -

Other Sources of Funding (university, county, non-tax, etc.)

						$ -
						$ -
						$ -
						$ -
						$ -
						$ -
TOTAL OTHER FUNDS	0.0	$ -	$ -	$ -	$ -	$ -
TOTAL ALL FUNDING	0.0	$ -	$ -	$ -	$ -	$ -

Approved: _____

(Director or Administrator, State Extension Service)   (Date)

*If total does not calculate automatically, enter the total amount

HINT: Cell I15 ("eye"15) automatically divides the total amount for Paraprofessionals by the Total Funds Available. If cell I15 is less than 60% it will turn red indicating the budget needs to be revised.

NOTE: Total Amount for the Paraprofessional line item <u>must</u> be at least 60% of the Total Funds Available. If it is not, your budget will <u>not</u> be accepted!

EFNEP Program Policy states: *"At least sixty (60) percent of the total annual Federal appropriation to each state is to be used for paraprofessional personnel and their support costs"*

Enter Clerical & Secretarial FTE*, Salary and Expenses: cells C16-G16

*FTE is Full Time Equivalent (FTE). One FTE = 2080 hrs. per year

Clerical & Secretarial Total Amount will calculate automatically*: cell H16

*if total does not calculate automatically, enter the total amount

Column Totals will Calculate Automatically*: cells C17-H17

*if total does not calculate automatically, enter the total amount

Verify that cell H7 - Total Funds Available equals cell H17 Total Amount

HINT: If Total Funds Available does not equal Total Amount, a red warning message will appear indicating the budget needs to be revised.

List Other Sources of EFNEP Funding

List the Names of Other Sources of Funding: cells A20-A26 (add rows as needed*)

* If rows are added formulas to calculate totals may need to be adjusted

Enter FTE, Salary and Expenses for Other Sources of Funding: cells C-G, 20-26

*If rows are added formulas to calculate totals may need to be adjusted

Total Amounts for Other Sources of Funding will calculate automatically: cell H20-H26

*If total does not calculate automatically, enter the total amount;
*If rows are added formulas to calculate totals may need to be adjusted

Totals for Other Funds will calculate automatically: cell C27-H27

*If total does not calculate automatically, enter the total amount;
* If rows are added formulas to calculate totals may need to be adjusted

Totals for All Funding Sources will calculate automatically: cell C28-H28

*If total does not calculate automatically, enter the total amount

Budget Sheets <u>MUST</u> be Signed by your State Extension Director or Administrator

Appendix B: Budget Justification Instructions

A budget justification is a narrative description of how the funds listed on your EFNEP budget sheet will be used. Descriptions should be brief, yet clear. Expenses should all support the goals of EFNEP.

For each budget category, please make sure you do the following:
- Match the budget figures in the justification to those on your budget sheet
- Break expenses down by staff type **–** *i.e., for professionals expenses include… for paraprofessionals expenses include… etc.*
- Include budget figures and break down lump sums **–** *e.g., if $500,000 is allocated for supplies, you need to state that $xx is for food for demonstrations, $xx is for paper goods, etc.*
- Only allocate funds in the proportion they are used for EFNEP - *If you share expenses with other programs/partners, make sure your justification includes a statement to that effect*
- Explain how much of the total for that budget category is supported by carryover funds

Explanation of Budget Categories:

Salaries & Benefits

Provide a 1-2 sentence narrative description of the staff type as well as budget figures for the number of staff and the breakdown of Full Time Equivalents (FTEs), salaries, and benefits. Do not include names or other Personally Identifiable Information.

Travel

Provide a narrative description as well as budget figures for funds used for local and out of state/territory travel. Be specific in terms of how much funding is designated for various items *(e.g., $XXX for out of state conferences such as… funds will cover costs for hotel, mileage, …).*

Make sure to include travel funds for the Coordinator or his/her designee to travel to the National EFNEP Conference. Other conferences, with the exception of Regional EFNEP Conferences and the Society of Nutrition Education and Behavior (SNEB) Conference, need additional justification.   Be clear how the conference relates to EFNEP and how attendance supports programming (e.g., are you presenting on EFNEP? Will the sessions focus on EFNEP related topics?).

If costs are prorated because the conference/event has goals related to other roles/responsibilities of the attendee, explain what proportion of the cost is paid for using EFNEP funds.

Equipment

Equipment costs are uncommon - ***only single items costing over $5000 should be included under equipment. Any piece of equipment costing less than $5000 should be included under "Other Expenses".*** If you have equipment costs, provide a narrative description as well as budget figures for each piece of equipment you plan to purchase with EFNEP funds. Be specific in terms of why this item is needed and whether it will be used solely for EFNEP or prorated.

Other Expenses

Include a narrative description as well as budget figures for other expenses such as: materials and supplies; publications; curricula; computers; etc. Descriptions should be specific in terms of how much funding is designated for various items *(e.g., $XXX for educational materials which will be used to…., $XX for printing, $XX for food supplies for demonstrations, etc.)*. Please also include/describe any amount you plan to carry forward in the event that the release of Federal funds is delayed (intentional carryover).

Other Sources of Funding

Include a narrative description as well as budget figures for other sources of funding such as university, county, non-tax or other sources of additional support (if applicable) and how these funds are used to support EFNEP.

Explanation of Carryover

Carryover funds should be factored into your overall budget and thus this section should simply provide a narrative description as well as budget figures to explain how they were factored into the other sections *(i.e., under Salary and Benefits you may have a statement that says $xx from carryover funds was used toward Salaries. Then under explanation of carryover you could say, as indicated above, $xx was used toward Salaries…)*. If you have any intentional carryover (captured under "Other Expenses"), explain why funds are being carried over, how long you expect to carry them over and your plan to spend them down in subsequent years. If the National Office has requested a spend-down plan due to excessive carryover, include that here as well.

Note: *EFNEP funds are expected to be fully expended in the fiscal year of appropriation; however funds may be carried over for up to four (4) years after the end of the year for which they were appropriated.*

Note: *Carryover funds should be spent prior to spending new allocation amounts; funds should be first in, first out.*

Appendix C: Checklist to Avoid Common Mistakes

Use this checklist to avoid some of the common errors we encounter during our review. **You should have "YES" selected for each item.** Any items marked "NO" should be corrected prior to submission.

Budget Sheet

1. Did you use the EFNEP Budget Sheet (excel)? YES ☐ NO ☐

2. Did you follow the instructions for completing the Budget Sheet? YES ☐ NO ☐

3. Did you enter the correct allocation amount? (see RFA Instructions, Appendix A) YES ☐ NO ☐

4. Did you enter the correct fiscal year? YES ☐ NO ☐

5. Did you include carry-over funds? YES ☐ NO ☐

6. Did you allocate at least 60% of your total funds to Paraprofessionals and their support costs? (see EFNEP Program Policy Document) YES ☐ NO ☐

7. Does your "Total Amount" equal your "Total Funds Available"? YES ☐ NO ☐

8. Did you enter equipment costs correctly? (see Budget Justification Instructions)
   a. Single items costing $5000 or more should be listed under "Equipment"
   b. All others should be listed under "Other Expenses" YES ☐ NO ☐

9. Do the amounts entered in your Budget Sheet match the amounts listed in your Budget Justification? YES ☐ NO ☐

10. Is the Budget Sheet signed by your Extension Director or Administrator? YES ☐ NO ☐

11. Did you save the Budget Sheet as a PDF document? YES ☐ NO ☐

Budget Justification

1. Did you follow the instructions for completing the Budget Justification? YES ☐ NO ☐

2. Do the amounts listed in your Budget Justification match the amounts entered in your Budget Sheet? YES ☐ NO ☐

3. Did you break expenses down by staff type? YES ☐ NO ☐

4. Did you provide a brief explanation of each of the items in your budget sheet including sufficient justification for any large or unusual expenses? YES ☐ NO ☐

5. Did you include funding for the EFNEP Coordinator or his/her designee to attend the National EFNEP Conference? YES ☐ NO ☐

6. Did you report equipment costs correctly? (see Budget Justification Instructions)
   a. Single items costing $5000 or more should be listed under "Equipment" YES ☐ NO ☐
   b. All others should be listed under "Other Expenses"

   YES ☐ NO ☐

7. Did you avoid using EFNEP funds for unallowable expenses?

   YES ☐ NO ☐

   a. Did you avoid using EFNEP funds for marketing materials[1]?

   YES ☐ NO ☐

   b. Did you avoid using EFNEP funds for furniture costs?

8. For any items on the budget which are shared, did you allocate EFNEP funds only in proportion to the amount they will be used in support of EFNEP? YES ☐ NO ☐

   YES ☐ NO ☐

9. If you have a large amount of carryover, did you explain how you intend to spend it down?

10. Did you explain how much of the total for each budget category is supported by carryover funds? YES ☐ NO ☐

---

[1] *Marketing materials, in general, are not considered allowable expenses; educational materials used to introduce potential participants and partners to the program are.*