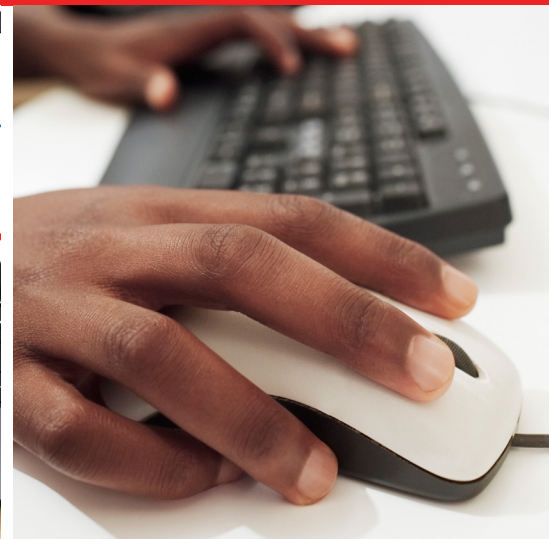


WEB NEEDS

USER MANUAL

Web-based Nutrition Education Evaluation and Reporting System



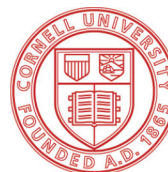
**July 2015
Updated
2020**

Written by:

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United States Department of Agriculture
National Institute of Food and Agriculture



**Cornell University
Cooperative Extension**

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Additional recognition is extended to individuals who have and continue to contribute to specific components of this work, which began in 2010. Most of these individuals have volunteered their time and expertise, without compensation. Some have provided such expertise through most of the ongoing evolution of EFNEP.

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These committee lists include all persons who participated; not all contributed the full length of the project

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(Draft question sets for each age group ready for use Oct 2012)

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Phase 2b: Further Testing with youth (Cognitive Interviews, Sensitivity) and staff (Surveys)(Oct 2012 - Dec 2013)

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(K-2 revised 11/13-10/14 from Phase 2b testing; 3-5 revised 11/13-1/18 from Phase 2b plus new expert review and cognitive testing)

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(Grades 6-8 and 9-12 questionnaire revisions underway, began Nov 2019)

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Thanks also to the expert reviewers, site representatives and children who participated in the cognitive interviews, and the many graduate and undergraduate students and staff from Clemson, Cornell, Michigan State, Ohio State, Penn State, Rutgers, and Colorado State Universities who helped with the cognitive interview data collection, analysis, and reporting, and with literature review.

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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-Education 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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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 University (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 **HyperText Transfer Protocol Secure** (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.



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.

Regional Level/Users

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



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.

Specific example of permissions use:

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.



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.



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.



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.



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.






The screenshot displays a web form titled "New Youth Group" with a red "Attention Needed" notification at the top. Below the title are four tabs: "CONTACT INFORMATION", "LEADERS", "ENTRY & EXIT DATA", and "DEMO". The "LEADERS" tab is selected, and an "Error Notifications" label with arrows points to a red error message: "* This field is required". Below the tabs, the "Name" field is outlined in red and labeled "Required field (outlined in red)". The "Mailing Name" field is highlighted in yellow and labeled "Active Field (highlighted in yellow)". The "Address" field is empty.

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: <i>Additional question sets can only be added in the checklist sections if they are created by an <u>Institute level</u> user and made available to that Region</i>
	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: <i>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.</i>
	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: <i>In some cases the print icon will specify “PDF” or “Print” to the right of the icon</i>

	Sort	The sort icon is used to sort the data in a table in ascending and descending order  Note: <i>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.</i>
	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	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**



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.



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

- **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.
- **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

- **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.



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**.



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**.



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:

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.



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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 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).



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



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.



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, Region level users are able to establish defaults for new entries. This might include the completion of certain fields within an adult or youth group record.



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.



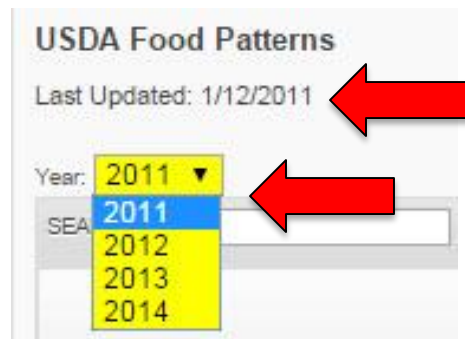
Recommended Calories

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.



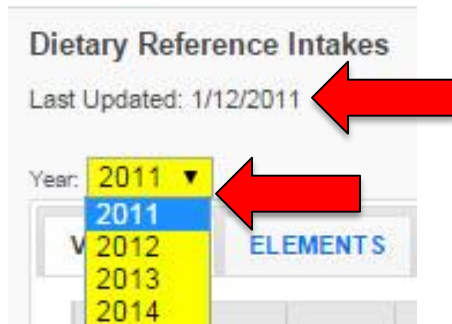
USDA Food Patterns

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.



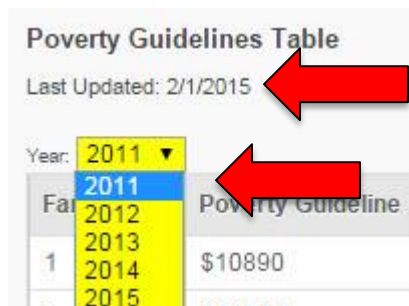
Dietary Reference Intakes

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

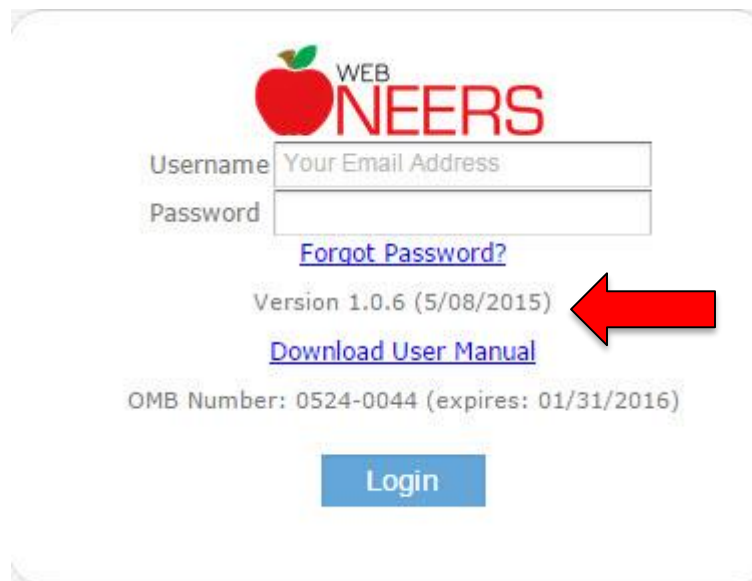
The section below contains guidance and helpful hints to assist to better understand the system, the data entry and review process.

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.

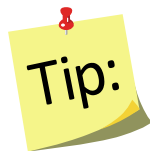
Selecting the number of entries per page

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

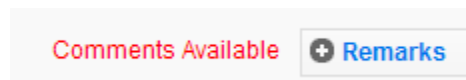
To speed up data entry, the user may choose to move between form fields by pressing the tab or enter key on his/her keyboard. If the user is on the last input field of a screen that uses the tab or enter key, he/she will automatically be forwarded to the next data entry tab, provided the user is not currently on the last tab of the page.



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.



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

The screenshot displays a dashboard with several functional areas:

- Adults:** Includes buttons for Manage Adults, Manage Recalls, Manage Checklists, Verify Addresses, and View Adult Errors. A Reports section contains options like 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, and Public Assistance List. A Setup section includes Defaults for New Adults, Subgroups, Filters, and Public Assistance.
- Youth Groups:** Includes buttons for Manage Youth Groups, Manage Checklists, Verify Addresses, and View Youth Errors. A Reports section contains options like 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, and Filter List. A Setup section includes Defaults for Youth Group, Subgroups, and Filters.
- Staff:** Includes buttons for Manage Staff, Manage Hours, and View Staff Errors. A Reports section contains options like Staff Mailing Labels, Email List (CSV), Status, Staff List, Volunteer List, and Profile Summary. A Setup section includes Add Staff (Data is Read-only) and Transfer Responsibilities (Data is Read-only).
- Annual Update/5-Year Plan:** Includes buttons for Manage Program Impacts and Edit Delivery Sites and Partnerships.
- Checklists:** Divided into Adult (View Adult Checklist Sets) and Youth (View Youth Checklist Sets). A Reports section contains options like Adult Checklist Set Report, Youth Checklist Set Report, Adult Question List Report, Youth Question List Report, Adult Question Detail Report, and Youth Question Detail Report.
- Data Management:** Includes buttons for Migrate Data and Export Data.
- Users:** Includes buttons for View Users, Add User, and View Pending Users.
- Tables:** Includes buttons for Table Version Info, View Foods, Daily Recommendations, Recommended Calories, USDA Food Patterns, Dietary Reference Intakes, and Poverty Guidelines Table.



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

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Users and Permissions Management

Creating New Users

A “user” in WebNEERS is someone who has access to log into the system and perform various functions such as adding, editing, or deleting data/information. When a user account is created the new person is able to access 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.



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**



*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**, Institute or Region

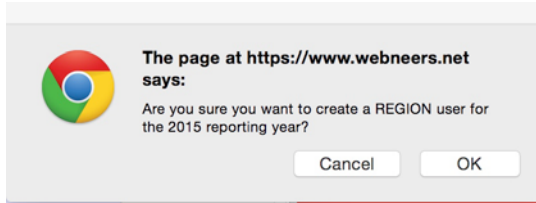
Institute User

- 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* to the new user.
8. Select **Save** at the bottom of the page.
9. Click OK to confirm the creation of this new user.



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.*




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

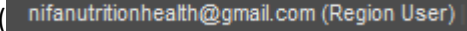
1. Select **View Users** from the **WebNEERS Home page**.
2. Select the **Edit icon** () next to the user whose permissions are to be edited.
3. Select **Rights** tab.
4. Select () or de-select () the permissions of the user.
5. Select **Save** at the bottom or top of the page.

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.

User Information and Settings

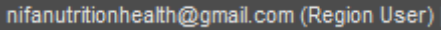
To manage user settings, the user can select their email address in the dark gray bar at the top of the screen (). This will direct the user to the “User Information and Settings Page.” On this page, the user can manage their **User Information**, **Change Password**, modify their **Food Search Algorithm**, modify **Dual User Access** (when applicable), and view their **User Permissions**.

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 () in the dark gray bar.
2. In the second box of information, enter the user’s **current password**.
3. Enter the **new password** and re-enter the password.
4. Select the **Update Password** button to save the change.

Change Password

Current Password:

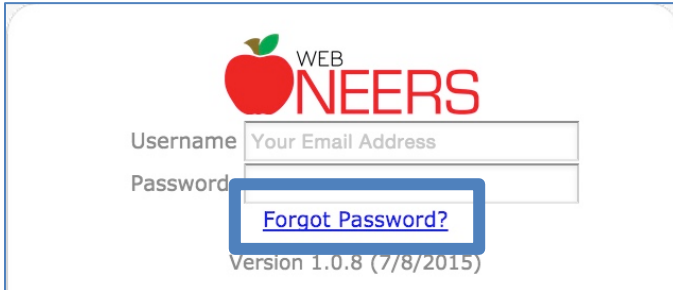
New Password:

Confirm Password:

Forgot Password?

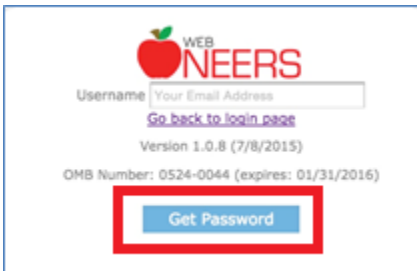
If the password is forgotten, at the Login screen, the registered user can reset it.

1. Select **Forgot Password?**



The screenshot shows the WEB NEERS login interface. At the top is the logo featuring a red apple with a green leaf and the text 'WEB NEERS'. Below the logo are two input fields: 'Username' with the placeholder text 'Your Email Address' and 'Password'. A blue box highlights the 'Forgot Password?' link located below the password field. At the bottom of the form, it says 'Version 1.0.8 (7/8/2015)'.

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



The screenshot shows the WEB NEERS login interface after the user has entered their email address. The 'Username' field contains 'Your Email Address'. Below the fields is a link that says 'Go back to login page'. At the bottom, a blue button labeled 'Get Password' is highlighted with a red box. The text 'Version 1.0.8 (7/8/2015)' and 'OMB Number: 0524-0044 (expires: 01/31/2016)' is visible at the bottom of the page.

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 the password was request from. It may take several minutes for the password notification to come through.



*Please do not click **Get Password** more than once. Check junk mail or spam if the email from EFNEP/SNAP-Ed Admin is not received.*

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.



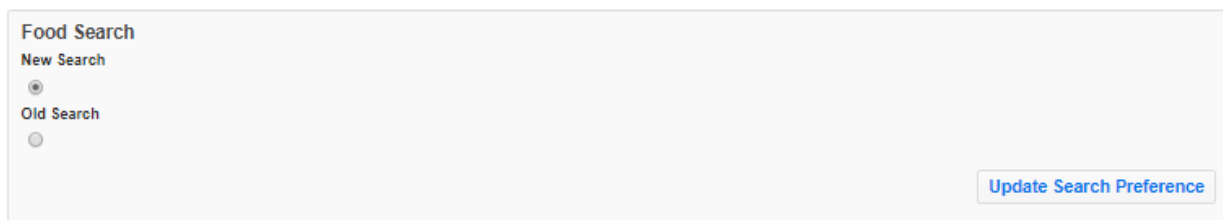
A user being able to change his/her own password is a default permission. If you create custom permissions, the user will need to be granted the permission to “change password.”

Food Search Preferences

Changing User Food Search Preferences

1. Access the **User Information** page by selecting the username displayed in the top right corner of the screen (`nifanutritionhealth@gmail.com (Region User)`) in the dark gray bar.
2. While in the **User Information** page, the user can choose **New Search** or **Old Search** to indicate which algorithm they would like to use when adding or managing participant food recalls.
3. Select the **Update Search Preference** button to save the change.

(For more information on these food search algorithms, see section 5 of the WebNEERS Manual.)



Food Search

New Search

Old Search

[Update Search Preference](#)

Dual User Access

The **Dual User Access** feature is a permission granted by the individual who manages user accounts at each institution, typically the institute EFNEP coordinator. This feature provides dual users (users with *both* Institute and Regional level accounts) the ability to switch easily between those accounts within their Institute level login.

To grant Dual User Access:

1. Login to Institute level WebNEERS account.
2. Access the **User Rights** page by selecting the “**View Users**” displayed in the top right corner of the screen.



3. Within the **View Users** section, select the **Edit icon** () next to the user whose institute level permissions are to be edited.

4. In the **“Rights”** tab, select Region to add regional level access to the user’s institute level permissions. Once selected, a **“Regions”** tab will appear to the right of the **“Rights”** tab. Review user’s permissions before moving to the **“Regions”** tab.

The screenshot shows a web interface with two tabs: 'INFORMATION' and 'RIGHTS'. The 'RIGHTS' tab is active. Below the tabs is a section titled 'User Rights'. Under this section, there is a 'User Type' label followed by two checkboxes: 'Institute' (checked) and 'Region' (unchecked).

The screenshot shows the same web interface, but now with three tabs: 'INFORMATION', 'RIGHTS', and 'REGIONS'. The 'REGIONS' tab is active. The 'User Rights' section is still visible, but now both 'Institute' and 'Region' checkboxes are checked.



Please remember to review all permissions, to ensure that the users have appropriate access to information in WebNEERS before moving to the **“Regions”** tab.

5. Click on the **“Regions”** tab, if there is more than one region at the institute available to the user, select which region(s) to grant the user access to.

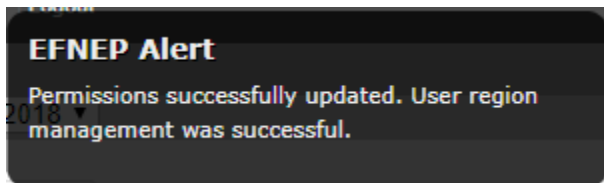
The screenshot shows the 'REGIONS' tab active. Below the tabs is a section titled 'User Regions'. It contains a table with two rows: 'Highlands' and 'Midlands'. Each row has a checkbox to its right. A red arrow points to the checkbox for 'Midlands'. At the bottom of the interface are 'Cancel' and 'Save' buttons.

Region	Access
Highlands	<input type="checkbox"/>
Midlands	<input type="checkbox"/>

6. Save changes, and check that the WebNEERS “EFNEP Alert” appears in the top right corner.

Region	Selected
Highlands	<input checked="" type="checkbox"/>
Midlands	<input checked="" type="checkbox"/>

Buttons: Cancel, Save




Once **Dual User Access** is enabled, the user can switch between their Institute and Regional accounts by selecting the “Switch to Region Access” or “Switch to Institute Access” link at the top right of the WebNEERS home page.



Removing Users

As staff transition out of their role with EFNEP, **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?”





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  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?”

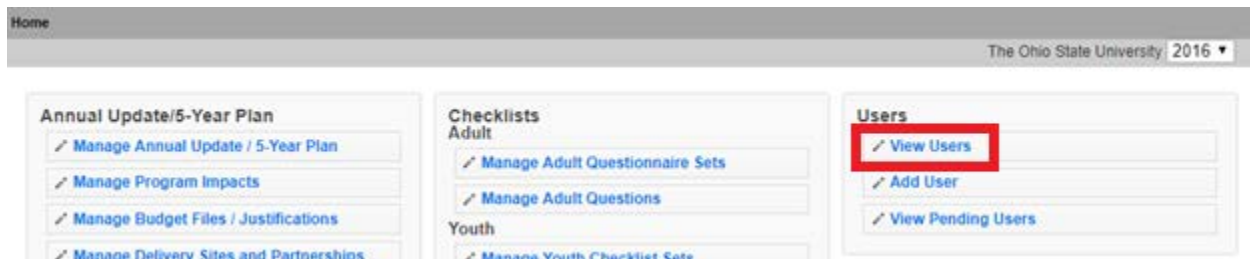



The user will disappear from the list of inactive users and move to the list of active users. To view the active users, click the “**View Active Users**” button on the top left.

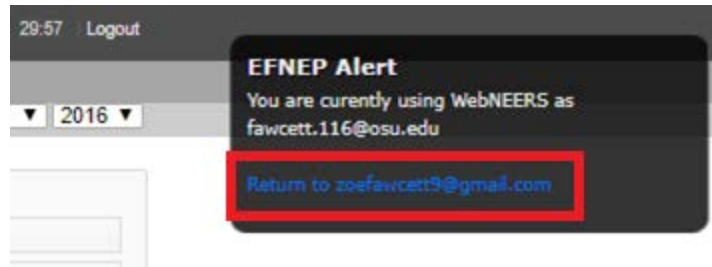
Masquerade Feature

The **Masquerade Feature** allows a user to assume the role of another user listed in **View Users** button of the **Users** section. This can be helpful for quickly determining what other users can see when logged into their accounts, or to remotely assist other users. This feature is available to any users that have permission to manage all users for institute (Permission 155).

To use this feature:



1. Select **View Users**.
2. On the View Users screen select the **Star icon** () next to the user to be assumed.
3. After assuming the role of the selected user, the user can now do anything that the assumed user has permission to do.
4. The user will see an **EFNEP Alert** box in the top right indicating that the masquerade feature is active.
5. To exit the masquerade feature, select the original user name, highlighted in blue in the **EFNEP Alert** box.



Note:

The steps for masquerading are the same for both Institute and Regional users. The only difference is the location of the “View Users” link on the page. For Institute level users, “View Users” is located in the **Users** section on the top, far right (third column) of the WebNEERS screen. For Region level users, the “View Users” section is located on the bottom left (first column) of the screen.

Changing Regions

Region Level

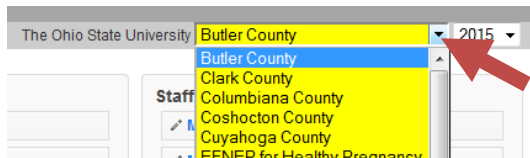
Users who have been granted permission to access more than one Region, can switch between the approved regions on their **Home page**.



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 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 users 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 a **Year** 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.*

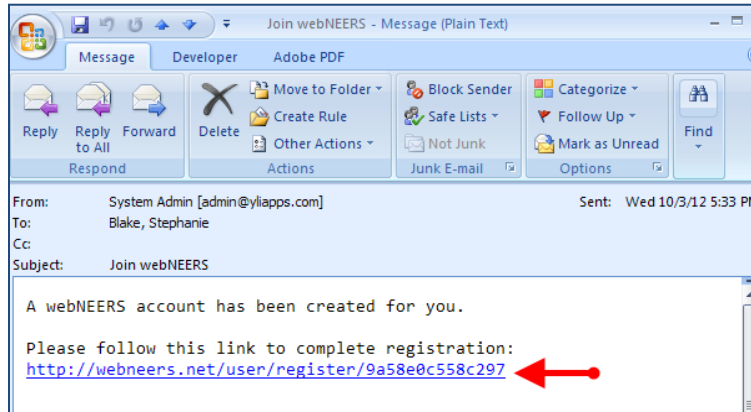
Registration Process for New Users

New 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 new user does not receive the email in his/her inbox, this person should review their "junk" or "trash" folder, as some email systems identify the email from **WebNEERS** as spam or other high-risk email.

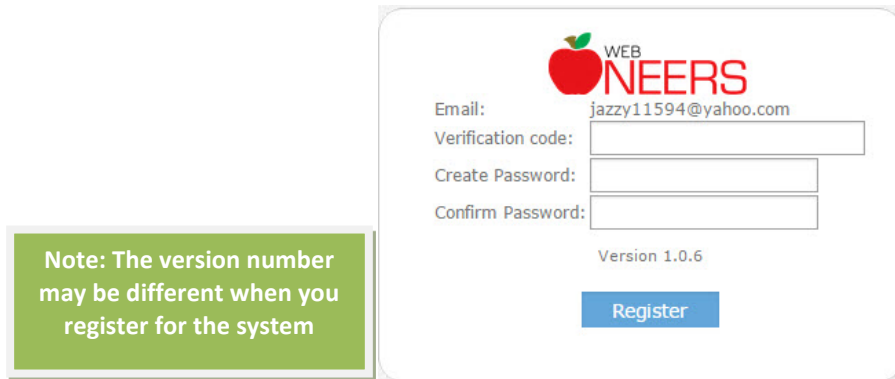
Note:

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

1. Select the link in the **Join WebNEERS** email.



This will forward the new user to a screen that looks like the image below:



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

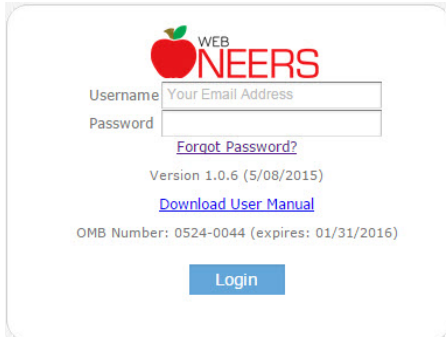
2. Enter the **Verification code** received in a separate email or by some other means of communication, when the user was added to the system. If the new user does not have a verification code, they should contact the person who setup their account.
3. Create a **Password**.
4. Reenter the password to Confirm.
5. Click **Register** to complete the registration process.



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 users.

Log In Once Registered

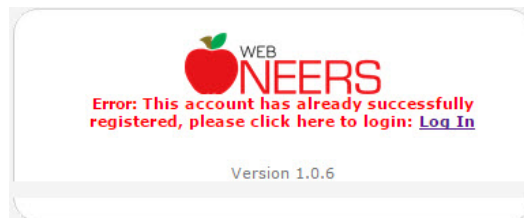
The log in screen, once the user has successfully registered, will look similar to the image below. At that point the user simply needs to enter his/her user name (email address) and password and click “Login” to access WebNEERS. If the password is forgotten, the user can use the steps above to reset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



Version numbers change each time the software is updated.



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 website 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 users 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..... 2**
- DEFAULTS FOR ADULTS..... 2*
 - Defaults for New Adults – Region Level Only..... 2*
 - Defaults for New Youth Groups – Region Level Only..... 5*
- SUBGROUPS, FILTERS, AND PUBLIC ASSISTANCE..... 7*
 - Subgroups 7*
 - Region Level 8*
 - Institute Level..... 8*
 - Creating Subgroups..... 8*
 - Viewing Subgroups..... 9*
 - Editing Subgroups 10*
 - Deleting Subgroups 11*
- FILTERS 12*
 - Region Level 12*
 - Institute Level..... 12*
 - Creating Filters 13*
 - Viewing Filters..... 16*
 - Editing Filters 17*
 - Deleting Filters 18*
- PUBLIC ASSISTANCE 18*
 - Region Level 18*
 - Institute Level..... 18*
 - Creating Public Assistance: 18*
 - Viewing Public Assistance 19*
 - Editing Public Assistance..... 21*
 - Deleting Public Assistance..... 21*
- MANAGE REPORTING DATES (OPTIONAL FEATURE) 21*
 - Define Reporting Dates 22*
 - Remove Reporting Dates 22*

Customizing the System to Meet Local Needs

WebNEERS provides a high degree of flexibility. Institute and Region level 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 Region level users. This section also discusses customizing subgroups and filters. This option can be set up at the Region and Institute levels 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 Region level 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

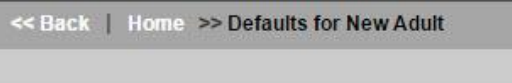
Creating Defaults for New Adults

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.

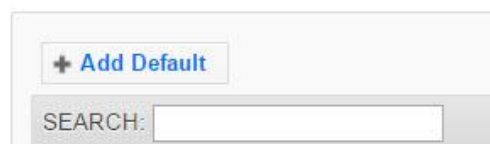


Note:

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



2. Select **Add Default**



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. Federal, Institute and Region level 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

City

State


Zip


Residence Type

Lesson Type

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**

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

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 Institute and Region **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.

Manage	Type	Name	Description	Date Modified
	Region	Rockdale County	Sessions Conducted in Rockdale County	06/12/2014
	Region	DeKalb County	DeKalb Data Only	12/01/2014

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.

Name
Test 1

Description
Description

Filter Generation
 Automatically Create Filter?

Cancel Save

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 “**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 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.

<< Back | Home >> Adult Subgroup List

University of Georgia Chatham 2015

PDF 


Subgroup List Report

System: EFNEP
Region: Chatham
Reporting Period: 10/01/2014 - 09/30/2015

SEARCH: SHOW All ENTRIES

Level	Name	Title	Date Modified
Federal	EFNEP	Expanded Food Nutrition Education Program	
Federal	ESWIC	ES / WIC	
Federal	SNAP-Ed	Supplemental Nutrition Assistance Program - Education	
Federal	Team Nutrition	Team Nutrition	
Federal	Sample	Diet/Checklist Sample Group	
Institute	Food Talk - Hablemos de Comida	Food Talk delivered in SP by bilingual Program Assistant	11/08/2013
Institute	Food Talk - Hablemos de Comida - Interpreter	Food Talk delivered through a community Interpreter	11/08/2013
Institute	Social Media		10/06/2014
Region	African American Center		12/01/2014

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



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 Institute level or Federal level 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:

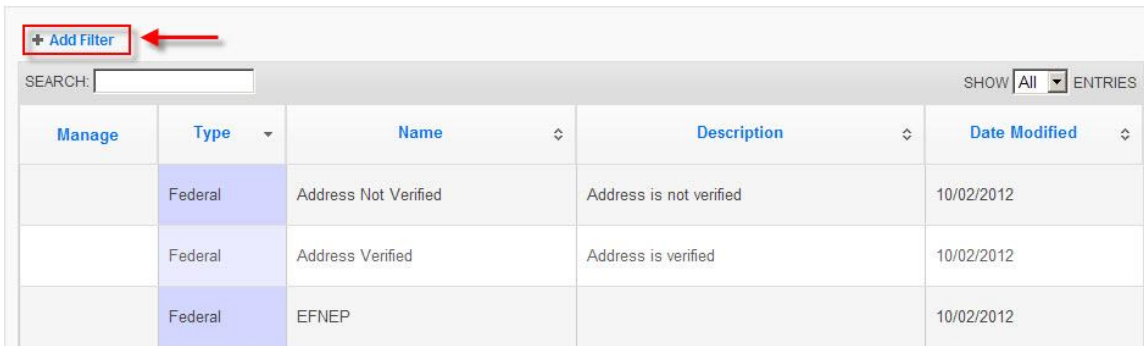
If there are multiple users in an Institute, all filters created, regardless of who created the filter, will be available and listed on this screen.

Note:

Institute level users cannot see Region level filters; those are only visible at the Region level.

Creating Filters

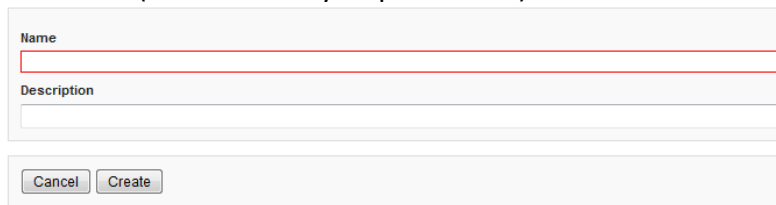
2. Select **Add Filter** on the left of the screen above the table of filters.



The screenshot shows a user interface for managing filters. At the top left, there is a button labeled '+ Add Filter' with a red arrow pointing to it. Below this is a search bar and a 'SHOW All ENTRIES' dropdown. A table lists existing filters with columns for Manage, Type, Name, Description, and Date Modified.


Manage	Type	Name	Description	Date Modified
	Federal	Address Not Verified	Address is not verified	10/02/2012
	Federal	Address Verified	Address is verified	10/02/2012
	Federal	EFNEP		10/02/2012

3. **Name** (this is the only required field) and **Describe** the filter

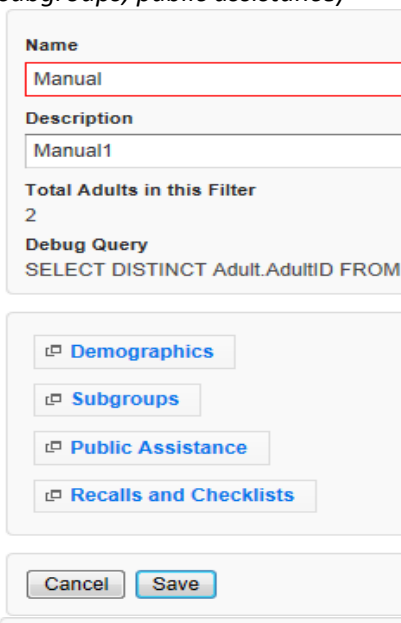


The screenshot shows a form for creating a new filter. It has two text input fields: 'Name' and 'Description'. Below the fields are 'Cancel' and 'Create' buttons.

4. Select **Create**

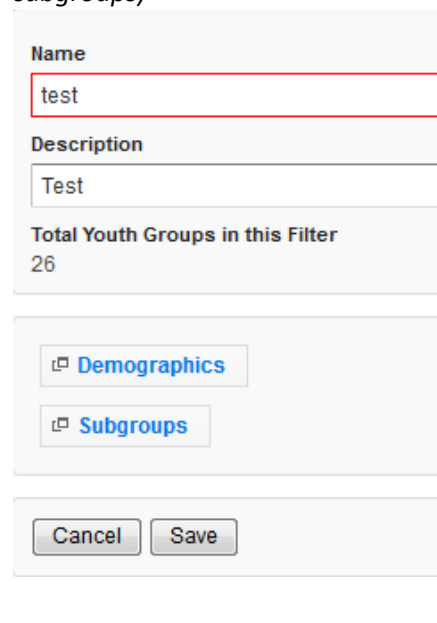
 **Note:** *The number of adults or youth groups captured by the filter is listed below the Description field. Before characteristics are selected, the number equals to the total number of adults or youth groups in the Region or Institute level. The number will update as you apply characteristics to the filter.*

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



The screenshot shows the 'Setup Adults' configuration form. The 'Name' field contains 'Manual' and the 'Description' field contains 'Manual1'. Below these fields, it displays 'Total Adults in this Filter' as 2 and a 'Debug Query' starting with 'SELECT DISTINCT Adult.AdultID FROM'. At the bottom, there are four expandable sections: 'Demographics', 'Subgroups', 'Public Assistance', and 'Recalls and Checklists'. 'Cancel' and 'Save' buttons are at the bottom.

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



The screenshot shows the 'Setup Youth Groups' configuration form. The 'Name' field contains 'test' and the 'Description' field contains 'Test'. Below these fields, it displays 'Total Youth Groups in this Filter' as 26. At the bottom, there are two expandable sections: 'Demographics' and 'Subgroups'. 'Cancel' and 'Save' buttons are at the bottom.

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**.



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.

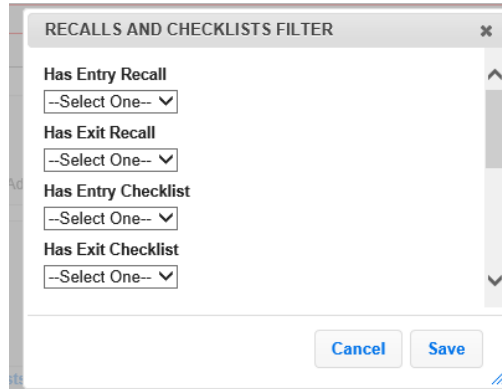


Note:

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.



Note: *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

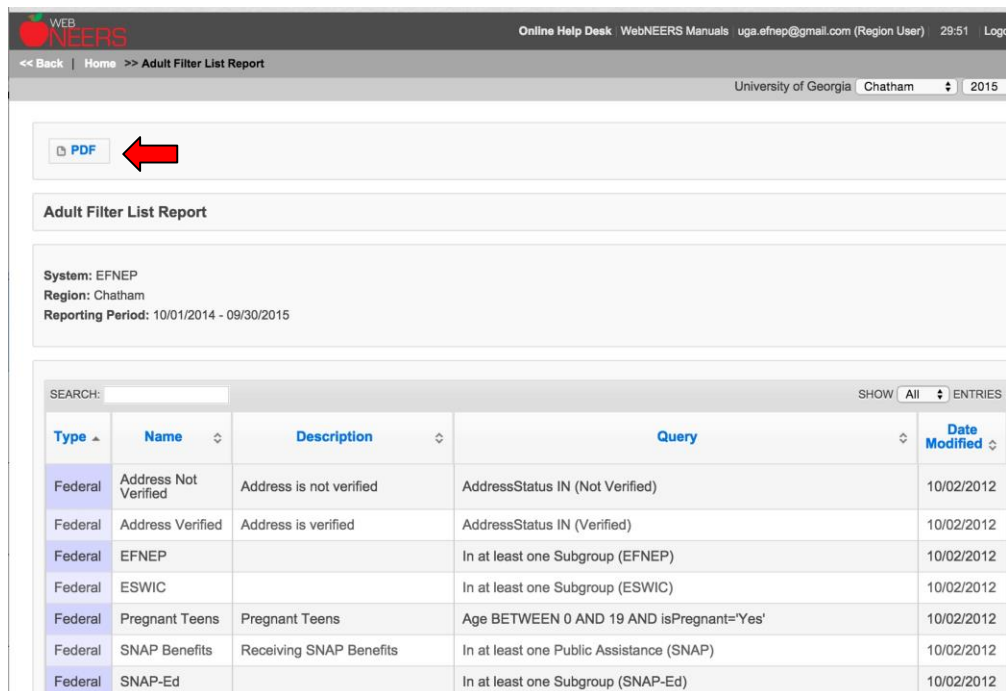
Type the word "Region" into the live search option at the top left of the table. This will filter the results. You can also do this for Institute and Federal level filters.

To view only Institute Level Subgroups

Type the word “**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 subgroups.

Filter List Report


Select **Filter 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 filters.



The screenshot shows the WebNEERS interface for the 'Adult Filter List Report'. At the top, there is a navigation bar with 'PDF' and a red arrow pointing to it. Below this, the report title 'Adult Filter List Report' is displayed. The system information includes 'System: EFNEP', 'Region: Chatham', and 'Reporting Period: 10/01/2014 - 09/30/2015'. A search bar is present above a table of filter entries. The table has columns for Type, Name, Description, Query, and Date Modified.

Type	Name	Description	Query	Date Modified
Federal	Address Not Verified	Address is not verified	AddressStatus IN (Not Verified)	10/02/2012
Federal	Address Verified	Address is verified	AddressStatus IN (Verified)	10/02/2012
Federal	EFNEP		In at least one Subgroup (EFNEP)	10/02/2012
Federal	ESWIC		In at least one Subgroup (ESWIC)	10/02/2012
Federal	Pregnant Teens	Pregnant Teens	Age BETWEEN 0 AND 19 AND isPregnant='Yes'	10/02/2012
Federal	SNAP Benefits	Receiving SNAP Benefits	In at least one Public Assistance (SNAP)	10/02/2012
Federal	SNAP-Ed		In at least one Subgroup (SNAP-Ed)	10/02/2012

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 [creating filters](#).

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.

Note:

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**

Note:

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.

Manage	Type	Name	Description	Food Assistance	Active	Date Modified
	Federal	Child Nutrition		Yes	Yes	
	Federal	FDPIR		Yes	Yes	
	Federal	Head Start		Yes	No	
	Federal	Other		Yes	No	
	Federal	SNAP		Yes	Yes	

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

Name * This field is required

Description

Food Assistance

Active

Cancel Save

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

5. If you are an Institute level 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. Institute level public assistance and Federal level public assistance will show up here automatically if applied by the Federal or Institute level users. If there are multiple users in a region, all public assistance created by Region level users, will be available here; Institute level 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.

WEB NEERS Online Help Desk WebNEERS Manuals uga.efnep@gmail.com (Region User) 29:45 Logout

<< Back Home >> Public Assistance List Report University of Georgia Chatham 2015

PDF


Public Assistance List Report

System: EFNEP
Region: Chatham
Reporting Period: 10/01/2014 - 09/30/2015

SEARCH: SHOW All ENTRIES

Level	Name	Description	Food Assistance	Active	Date Modified
Federal	Child Nutrition		Yes	Yes	
Federal	FDPIR		Yes	Yes	
Federal	Head Start		Yes	Yes	
Federal	Other		Yes	Yes	
Federal	SNAP		Yes	Yes	
Federal	TANF		Yes	Yes	
Federal	TEFAP - Commodity		Yes	Yes	
Federal	WIC/CSPF		Yes	Yes	

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.



Tip:

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



Note:

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)



Note:

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

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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 Region level 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. Region Level users should seek guidance on this from their Institution.



Note:

When you add someone as a WebNEERS Region level 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 Professional staff are:

- Nutrition supervisors
- Supervising Community Educators

Examples of Paraprofessional staff are:

- Community Educators
- Nutrition Educators
- Peer Educators
- Nutrition Education Assistants delivering content to participants

Examples of Volunteer staff are:

- Persons from the community who assist in programming, who are not paid by EFNEP or Extension funds for their efforts.



Note:

Entry of adult participant 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.

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.

<< Back | Home >> Manage Staff >> Add Staff

Staff Type * This field is required
--Select One--
Custom ID

Cancel Next

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.

Screenshot of the Custom ID field is found below.

Custom ID Screenshot

<< Back | Home >> Manage Staff >> Edit Staff Member

University of Georgia | Chatham | 2015

ALJ: Jordan, Lisa - Professional

DEMOGRAPHICS | **HOURS**

First Name: Lisa | Last Name: Jordan

Address: 124 Bull Street

Custom ID (?): LJ

Ethnicity:

Adding Staff and Staff Hours to WebNEERS

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:

Cancel | Next

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



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 the supervisor into WebNEERS 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 demographics screenshot

PCM: Martinez, Carmen - Paraprofessional

DEMOGRAPHICS HOURS

First Name * This field is required * This field is required

Address

City State Zip

Savannah GA

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 demographics screenshot

V: New Staff Attention Needed

DEMOGRAPHICS HOURS

First Name Last Name

Helpful Hannah

Staff

Staffer, Sally | P

Address

City State Zip

 SC

Phone Ext

Email

Sex

Female

Custom ID (?)

Ethnicity

--Select One--

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

--Select One--

Categories

Cancel Save



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, role of the volunteer, and duties of the volunteer.

Volunteer Roles and Duties

For more information on the use of Volunteers to support EFNEP, definitions of each volunteer type as well as examples of duties, management, and training needs, please refer to the EFNEP Volunteer Policy resources at:

<https://nifa.usda.gov/resource/efnep-volunteer-policy-resources>

- **Formal Volunteer Program** – Individuals who have completed formal training, as part of an existing volunteer program or one that has been developed for EFNEP. Formal Volunteer duties may include one or more of the following.
 1. **Support service** (provide food, space, transportation, and other logistical and infrastructure support)
 2. **Recruitment/follow-up** (identifies and engages potential participants and/or continues learning experience beyond program participation)
 3. **Educational support** (assist with in-class and online learning experience – instruction and food demonstrations)
 4. **Independent teaching** (teaching on a limited basis)
 5. **Data collection** (assist participants with completing data, and then with gathering data, but not data inputting or evaluation)
 6. **Language and cultural context** (facilitate language and cultural understanding)
 7. **Content development** (contribute to content and other resource development and dissemination)
 8. **Programmatic support** (assist in operationalizing program direction in accordance with university/agency priorities).



An individual may not be indicated under the **Formal Volunteer Program** Role unless a nationally approved volunteer plan exists. See the end of this document for a description of the contents of a Formal Volunteer Plan.

- **Non-Agency Volunteers** – Individuals who may or may not have volunteer experience and who want to assist with EFNEP without financial compensation. Non-Agency Volunteer duties may include one or more of the following.

All of duties listed for Formal Volunteers except Independent teaching

 1. **Support service** (provide food, space, transportation, and other logistical and infrastructure support)
 2. **Recruitment/follow-up** (identifies and engages potential participants)

- and/or continues learning experience beyond program participation)
3. Educational support (assist with in-class and online learning experience – instruction and food demonstrations)
 4. Data collection (assist participants with completing data, and then with gathering data, but not data inputting or evaluation)
 5. Language and cultural context (facilitate language and cultural understanding)
 6. Content development (contribute to content and other resource development and dissemination)
 7. Programmatic support (assist in operationalizing program direction in accordance with university/agency priorities).
- *Agency Paid-Volunteers* – Individuals who are not paid by Extension, who assist with EFNEP as part of their job responsibilities in another organization. Agency-Paid Volunteer duties may include one or more of the following. *All of duties listed for Formal Volunteers except Independent teaching*
 1. Support service (provide food, space, transportation, and other logistical and infrastructure support)
 2. Recruitment/follow-up (identifies and engages potential participants and/or continues learning experience beyond program participation)
 3. Educational support (assist with in-class and online learning experience – instruction and food demonstrations)
 4. Data collection (assist participants with completing data, and then with gathering data, but not data inputting or evaluation)
 5. Language and cultural context (facilitate language and cultural understanding)
 6. Content development (contribute to content and other resource development and dissemination)
 7. Programmatic support (assist in operationalizing program direction in accordance with university/agency priorities).
 - *Student/Interns* – Individuals who are not paid to support EFNEP, but who want to assist with EFNEP as part of their formal learning experience.
 1. Educational support (assist with in-class and online learning experience – instruction and food demonstrations)
 2. Data collection (assist participants with completing data, and then with gathering data, but not data inputting or evaluation)
 3. Language and cultural context (facilitate language and cultural understanding)
 4. Content development (contribute to content and other resource development and dissemination)
 5. Programmatic support (assist in operationalizing program direction in accordance with university/agency priorities).

Option 1 - Not Entering Hours When Adding Staff

1. 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.
2. 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

1. Select the **HOURS** tab.
2. Enter the hours for the staff member in the appropriate fields.

P05703: New Staff - Paraprofessional

DEMOGRAPHICS HOURS


Annual Hours Spent With Adults and Youth by Program		
Program	Adult	Youth
EFNEP	<input type="text" value="0"/>	<input type="text" value="0"/>
SNAP-Ed	<input type="text" value="0"/>	<input type="text" value="0"/>
State Project	<input type="text" value="0"/>	<input type="text" value="0"/>
Other	<input type="text" value="0"/>	<input type="text" value="0"/>
Adult / Youth Totals	<input type="text" value="0"/>	<input type="text" value="0"/>
Total	<input type="text" value="0"/>	

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



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.



All required information is outlined in red.


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



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.



*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**.



*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.*



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** ().

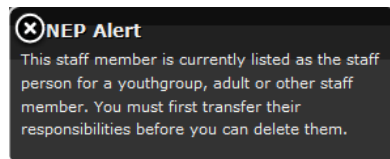


Before selecting the delete icon, please make sure the item selected/the information highlighted should be deleted. Once an item has been removed there is no way to restore it; you cannot “undo” a deletion.

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.



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).
See additional notes below.



Note:

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.
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**.

Staff Types

Professional

Paraprofessional

Volunteer

All ▼

Label Types

	Avery #	Dimensions	Across
<input type="radio"/>	Avery 5160	1" x 2 5/8"	3
<input checked="" type="radio"/>	Avery 5164	3 1/3" x 4"	2

Print Direction

Horizontal ▼

Sort

Zip Code ▼



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.



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**



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



*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.
- 5.

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.

The screenshot shows the 'Transfer Responsibilities' form in the WebNEERS system. At the top, there is a navigation bar with 'WEB NEERS' logo, 'Online Help Desk', and 'WebNEERS'. Below the navigation bar, there are links for '<< Back', 'Home', and '>> Transfer Responsibilities'. The main form area has a title 'Transfer Responsibilities From' followed by a dropdown menu set to '--From Staff--' and a 'To' dropdown menu set to '--To Staff--'. A red error message '* This field is required' is displayed above the 'To' dropdown. Below the dropdowns, there is a section titled 'Data to Transfer' with three checkboxes: 'Adults', 'Youth Groups', and 'Volunteers'. At the bottom of the form, there are 'Cancel' and 'Submit' buttons.

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.



*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.

Formal Volunteer Plan – Institute Level

Incorporation of a formal volunteer program requires a nationally approved volunteer plan. This volunteer plan should:

- provide a description of the volunteer program with justification;
- address each of the criteria listed in the first column of the document included below;
- give special attention to:
 - who the formal volunteer program will involve,
 - what their expertise is,
 - what their responsibilities will be,
 - how they will be supervised and monitored, and
 - how they will interface with paraprofessional staff; and
- indicate how volunteer data will be monitored.

The volunteer plan can be submitted electronically to the national office at any time. However, it is preferable that the volunteer plan be sent by email to the National EFNEP Coordinator (mallory.koenings@nifa.usda.gov) - and copied to the National Program Leader

(hchipman@nifa.usda.gov) – ***concurrent with*** the submission of the annual update or 5-year plan to WebNEERS, and the formal volunteers program be referenced in the annual update or 5-year plan. See Section 8 of the WebNEERS Manual for information on including the Formal Volunteer Program in the 5-year plan.

For more information on the use of Volunteers to support EFNEP, definitions of each volunteer type as well as examples of duties, management, and training needs, please refer to the EFNEP Volunteer Policy resources at: <https://nifa.usda.gov/resource/efnep-volunteer-policy-resources>

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

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¹ The Adult Food and Physical Activity Questionnaire is the Checklist being referenced, unless otherwise specifically noted.

Managing Adults – Adding, Editing, and Reporting

The Adult Section allows users to add, edit, and view Adult related information. Managing Adults is only possible as a Region level user.

All information gathered, from participants and paraprofessionals should be entered accurately. As this is the information that generates the reports for submission to the Institute and the Federal levels, precise data entry is essential for accurate, comprehensive, and quality reports.

Managing Adults

Adding New Adult Participants:

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

Remember to enter EFNEP data on the EFNEP site and SNAP-Ed data on the SNAP-Ed site .

Note:

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

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: 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.

Staff Member
--Staff By Name--

Program Status
Active

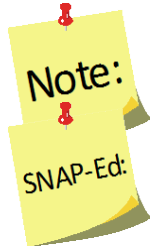
Custom ID

Default
--Select One--

Cancel Next

5. Select the **Program Status** of the adult being entered.

6. Assign a **Custom ID** or leave the field blank and a **Custom ID** will be generated by **WebNEERS**



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** were previously created, 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** were not previously created, choose the appropriate Subgroups.



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



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 to 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** were previously created, that defines the City and Zip, there is no need to enter that information again here.
 - b. If **Default Profiles for New Adults** were not previously created, 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.



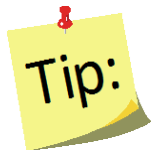
Note:

*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. User may update/revise the Custom ID on this screen. Or, if user still wish to assign a **Custom ID** user may do it here.*



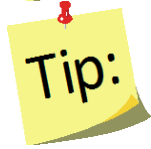
Note:

***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.*



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 user does not have to click save every time a tab is completed.

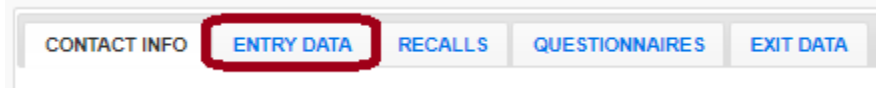


SNAP-Ed:

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



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 the adult is pregnant or nursing at any time during enrollment in the program. For recalls, enter pregnant or nursing only if the adult 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:

While 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** were previously created, that define the Residence Type and there is no need to enter that information again here.
- b. If **Default Profiles for New Adults** were not previously created, 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:

Free and Reduced 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
[Yellow box]

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 reflect 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**

--Select One--
✓ Group
Individual
Both group and individual
Other

16. Indicate the appropriate **Subgroups**

- a. If **Default Profiles for New Adults** were previously created, 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** were not previously created, 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:

*User can select as many subgroups as appropriate. User 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 questionnaires² 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 define the appropriate steps for completing entry of recall and questionnaire data, without exiting the record. This can also be done through the [Manage Recalls](#) and [Manage Questionnaires](#) screens (see below).

² The Questionnaires tab is the location into which the Food and Physical Activity Questionnaire and, if used, the Institute identified Additional Questions are entered.

Entry Data Tab - Screenshot

: New Adult Remarks

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

Adult Information

Age:

Sex: **Female** ▼

Pregnant

Nursing

Ethnicity: **--Select One--** ▼

Race:

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

Sub Race: **--Sub Race--** ▼

Highest Grade: **Not Supplied** ▼

Residence: **--Select One--** ▼

Household Information

Household Income (\$/month) (?):
N/S = not supplied

Children (?):

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

Others In Household:

Total Household:

Lesson Type

--Select One-- ▼

Subgroups

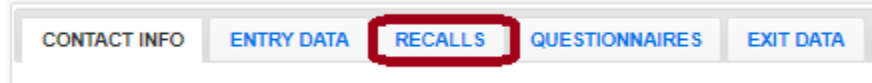
- F: EFNEP
- F: ESWIC
- F: SNAP-Ed
- F: Team Nutrition
- F: Sample
- F: ADULT Test
- R: HEI2010 testing-NY

Public Assistance at Entry

- F: Child Nutrition
- F: FDIPIR
- F: Head Start
- F: Other
- F: SNAP
- F: TANF
- F: TEFAP - Commodity
- F: WIC/CSFP

Recalls Tab

1. Select the **RECALLS** tab



2. Select **Add Recall**



Note:

Users 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 questionnaires.

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 users 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** (if applicable).
6. Check the box to indicate the participant **Is Nursing** (If applicable).



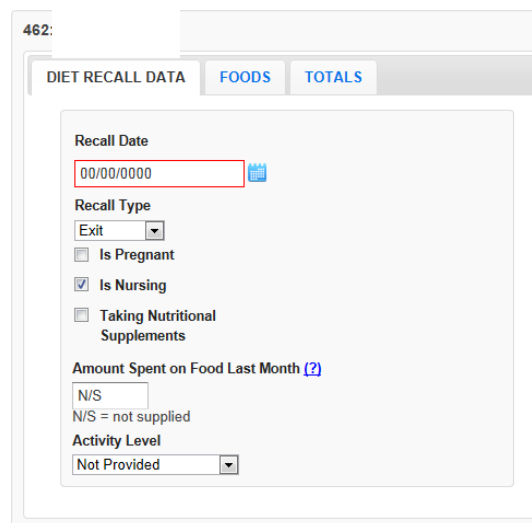
Note:

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”.



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

9. Indicate the **Activity Level**

Activity Level

- ✓ Not Provided
- Less than 30 Minutes
- 30 to 60 Minutes
- More than 60 minutes

Foods Tab

1. Select the **FOODS** tab.

Manage	Meal	Description	Number of Portions	Portions
--------	------	-------------	--------------------	----------

2. Select **Add Food**.



A search box will pop-up.

	Description	Additional Description	Food Code
+	Chicken nuggets	Weaver mini drums, Tyson chicken sticks, chicken bites, McDonald's Chicken McNuggets	24198740
+	Cake, chocolate, devil's food, or fudge, standard-type mix (eggs and water added to dry mix), NS as to icing	Jiffy, Washington	53105000
+	Yogurt, plain, nonfat milk		11411300





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

- To locate a food, type the **Food Item** (or food code) in the **Search** box and press enter.



Note:

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

- 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 does not exist in the database) on the participant's form.



Note:

After selecting a food item, the Food Quantity screen appears that gives options for Meal Type, Portion Size, and Number of Portions

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



Note:

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

- 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

- 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:

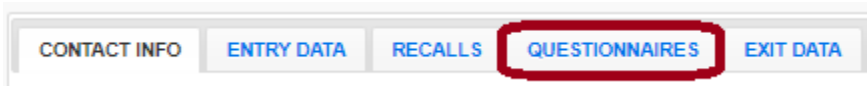
Once an item has been deleted, it cannot be undone.

6. Select **Save** at the bottom of the screen. This will return users 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.

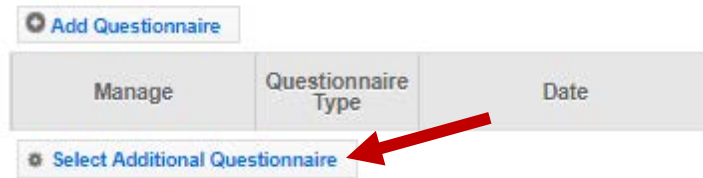
Questionnaires Tab

The Questionnaires tab is the location into which the Food and Physical Activity Questionnaire and, if used, the Institute identified Additional Questions are entered. The Food and Physical Activity Questionnaire is considered the “questionnaire” for the purposes of the instructions below.

1. Select the **QUESTIONNAIRES** tab.

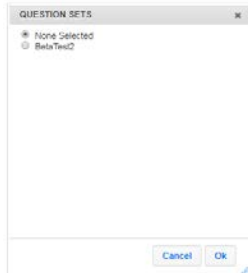


2. Select **Additional Questionnaire Set**, if appropriate. Otherwise, skip to step 4.



See the [Additional Questionnaire Set](#) section for more information.

3. Select the appropriate **Additional Questionnaire Set**, select **OK**.



4. Select **Add Questionnaire**.



Users will not have access to the Add Questionnaire button or be able to Add a Food and Physical Activity Questionnaire until the adult record has been saved. The save process establishes the adult participant and allows users to enter recalls and questionnaires.

5. The **Questionnaire Date** will automatically populate based on the entry or exit date.



If the questionnaire date is different from the entry or exit date, manually change the date by:

- a. Type manually - MM/DD/YYYY or
- b. Select the Calendar Icon (📅) and choose the correct date

6. **Questionnaire Type** will default **Entry** if it is the first questionnaire entered; **Exit** if it is the second; and **Additional** if more than two questionnaires have been entered.



If the second questionnaire entered **is not** the **Exit**, Questionnaire Type must be changed from **Exit** to **Additional**. To change the Questionnaire Type manually:

- a. Select the down arrow (▾) in the Questionnaire Type field.
- b. Select the correct **Questionnaire Type** for the Food and Physical Activity Questionnaire being entered.

7. Enter the value of the responses to the **Food and Physical Activity Questionnaire.**³

Food and Physical Activity Questionnaire Screen

Questionnaire Date
03/01/2016

Questionnaire Type
Entry

Twenty Core Questions

Question	Response	N/A	1	2	3	4	5	6
1. Eat fruit	-	Please enter a value from 1 to 6						
2. Eat vegetables each day	-	Please enter a value from 1 to 6						
3. Eat red and orange vegetables	-	Please enter a value from 1 to 7						
4. Eat dark vegetables	-	Please enter a value from 1 to 7						
5. Drink regular soda	-	Please enter a value from 1 to 7						
6. Drink fruit punch, fruit drinks, sweet tea, or sports drinks	-	Please enter a value from 1 to 7						
7. Exercise for at least 30 minutes	-	Please enter a value from 1 to 8						
8. Strengthen muscles	-	Please enter a value from 1 to 7						
9. Small changes to be active	-	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10. Do you wash hands before food preparation?	-	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11. Clean items/surface after contact with raw meat or seafood	-	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
12. Thaw frozen food at room temperature	-	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
13. Use meat thermometer	-	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
14. Eat less than wanted	-	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
15. Not enough money for food	-	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
16. Cook dinner at home	-	Please enter a value from 1 to 7						
17. Compare food prices	-	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
18. Plan meals before shopping	-	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
19. Check cupboard before shopping	-	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
20. Make a list	-	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Cancel Save



This can be done by choosing the appropriate field or by entering the number reflecting the corresponding answer in the “Response Column.” One of the following symbols should be entered if the adult left a question blank: - ~ or . The N/A radio button should be selected if an adult indicates that a question does not apply to them. For example, if an adult is vegetarian, they may indicate that question 11 (Clean items/surfaces more often after contact with raw meat or seafood) does not apply.

³ The Food and Physical Activity Questionnaire must be collected, from program participants, with adherence to the Facilitation Protocol. The standardized facilitation protocol ensures that data collected from program participants is collected in the same way across all Land Grant University programs.


Additional Questionnaire Set, if selected, will appear directly below the Food and Physical Activity Questionnaire. Additional questions will only appear if they have been activated at the Institute level.

- Enter the value of the responses to the **Additional Questions**, if appropriate. *The **Additional Questionnaire Set** will appear directly below the Food and Physical Activity Questionnaire if selected in step 3.*



20. Make a list before shopping more often

Additional Core		Response	N/A	1	2	3	4	5	6
21. How many different kinds of vegetables do you usually eat in a day?	<input type="text" value="6"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
22. Over the last week, how many days did you eat beans and peas?	<input type="text" value=""/>	Please enter a value from 1 to 7							
23. How many times a day do you drink milk or soymilk?	<input type="text" value=""/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
24. How many days did you eat yogurt or drink smoothies with yogurt?	<input type="text" value=""/>	Please enter a value from 1 to 7							
25. How many days did you eat cereal with milk?	<input type="text" value=""/>	Please enter a value from 1 to 7							
26. How often do you drink energy drinks?	<input type="text" value=""/>	Please enter a value from 1 to 7							
27. How many days a week do you eat meals prepared outside of your home?	<input type="text" value=""/>	Please enter a value from 1 to 7							
28. How often do you use a written weekly or monthly food spending plan?	<input type="text" value=""/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
29. How often do you budget enough money for food purchases?	<input type="text" value=""/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
30. How often do you use coupons for food purchases?	<input type="text" value=""/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
31. How often do you check for sales on foods before you shop?	<input type="text" value=""/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
32. How often do you check for food items on sale when you are at the store?	<input type="text" value=""/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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

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



Select the **Edit icon** () to make changes or select the **Delete icon** () to delete a questionnaire.

- Select the **CONTACT INFO** tab.

CONTACT INFO ENTRY DATA RECALLS QUESTIONNAIRES EXIT DATA

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



If user 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.



Note:

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



Tip:

Saving Adult Record: Users are not able to save adult records, 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 users within the record. After the initial save, a second click on **Save** will return users to the **Manage Adults** screen.

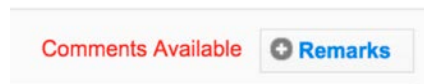
Remarks

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




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.*



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.



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.

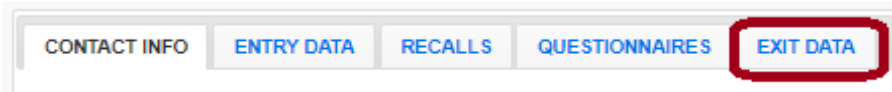
Exiting Adults

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, technology use and hours, as well as exit recalls and questionnaires, if appropriate, need to be added to the system.

In the technology use and hours section users record the levels of technology (low, medium, or high) being used for recruitment and retention of the exiting adult, as well as how many hours of technology-aided nutrition education instruction the exiting adult received.

For more information on technology use and EFNEP Programming, as well as examples of the levels of low, medium, or high technology use, please refer to the EFNEP Technology Policy resources at: <https://nifa.usda.gov/resource/efnep-technology-policy-resources>

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 user want to edit/view.
3. Select the **EXIT DATA** tab.



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

9. Choose the appropriate level of **Technology** used for recruiting or retaining the adult. The levels (low, medium, and high) will depend on the institution's technology use. Recruitment or retention low technology includes e-mail/text reminders, medium technology includes use of social media, and high technology includes video success stories.
 - a. In the **Recruitment or Retention column** mark that check box(es) next to the appropriate technology level(s) used for the exiting adult.
10. Choose the appropriate level of **Technology** used to deliver nutrition education with the adult and record the number of hours of education. The levels (low, medium, and high) will depend on the institution's technology use. Low technology education examples include using MyPlate SuperTracker, existing Apps, or "media moments" during lessons, medium technology examples include online make-up lessons or social media to reinforce learning, high technology examples include using a combination of in person and online lessons, interactive online lessons, or online group meetings.
 - a. In the **Education column**, enter the number of hours of instruction the adult received at each level of technology, if applicable. If less than 1 hour of technology education was received, please enter 0 hours.

Technology		
	Recruitment / Retention	Education
Low	<input type="checkbox"/>	0 Hours
Medium	<input type="checkbox"/>	0 Hours
High	<input type="checkbox"/>	0 Hours



Ex. If the user's institution is only using low technology approaches for recruitment and retention and no technology for education, please fill out the **Technology** section for exiting adults as depicted in the image below.

Technology		
	Recruitment / Retention	Education
Low	<input checked="" type="checkbox"/>	0 Hours
Medium	<input type="checkbox"/>	0 Hours
High	<input type="checkbox"/>	0 Hours

Exit Data Tab Screen

CONTACT INFO	ENTRY DATA	RECALLS	QUESTIONNAIRES	EXIT DATA												
<p>Status Active</p> <p>Exit Date 00/00/0000</p> <p>Number of Lessons 0</p> <p>Number of Sessions 0</p> <p>Number of Hours 0</p>				<p>Public Assistance at Exit (?)</p> <ul style="list-style-type: none"> <input type="checkbox"/> F: Child Nutrition <input type="checkbox"/> F: FDPIR <input type="checkbox"/> F: Head Start <input type="checkbox"/> F: Other <input type="checkbox"/> F: SNAP <input type="checkbox"/> F: TANF <input type="checkbox"/> F: TEFAP - Commodity <input type="checkbox"/> F: WIC/CSFP 												
				<p>Technology</p> <table border="1"> <thead> <tr> <th></th> <th>Recruitment / Retention</th> <th>Education</th> </tr> </thead> <tbody> <tr> <td>Low</td> <td><input type="checkbox"/></td> <td>0 Hours</td> </tr> <tr> <td>Medium</td> <td><input type="checkbox"/></td> <td>0 Hours</td> </tr> <tr> <td>High</td> <td><input type="checkbox"/></td> <td>0 Hours</td> </tr> </tbody> </table>		Recruitment / Retention	Education	Low	<input type="checkbox"/>	0 Hours	Medium	<input type="checkbox"/>	0 Hours	High	<input type="checkbox"/>	0 Hours
	Recruitment / Retention	Education														
Low	<input type="checkbox"/>	0 Hours														
Medium	<input type="checkbox"/>	0 Hours														
High	<input type="checkbox"/>	0 Hours														
<p>Cancel Save</p>																



Note:

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



Note:

Number of Lessons, Sessions 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 Questionnaire. 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.

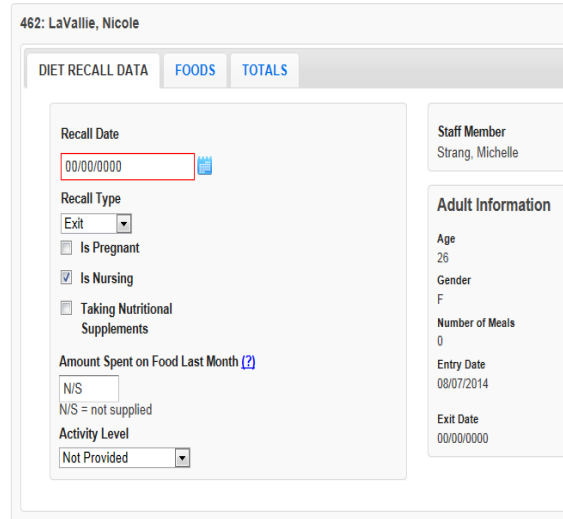
Managing Recalls

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 users 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** (if applicable).
8. Check the box to indicate the participant **Is Nursing** (if applicable).



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.

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**.

Activity Level

- ✓ Not Provided
- Less than 30 Minutes
- 30 to 60 Minutes
- More than 60 minutes

12. Select the **FOODS** tab.

DIET RECALL DATA **FOODS** TOTALS

+ Add food

Manage	Meal	Description	Number of Portions	Portions
--------	------	-------------	--------------------	----------

13. Select **Add Food**.



Note:

A search box will pop-up.

FOOD SEARCH

Common Selections

SEARCH: SHOW All ENTRIES

	Description	Additional Description	Food Code
+	Chicken nuggets	Weaver mini drums, Tyson chicken sticks, chicken bites, McDonald's Chicken McNuggets	24198740
+	Cake, chocolate, devil's food, or fudge, standard-type mix (eggs and water added to dry mix), NS as to icing	Jiffy, Washington	53105000
+	Yogurt, plain, nonfat milk		11411300



Note:



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

14. To locate a food, type the **Food Item** (or food code) in the **Search** box and press enter.



Note:

It is best to start with fairly general words, such as milk rather than 2% milk. See the next section on "Search Functions" (pg. 27) for more information on best practices when searching for food items.

- 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 does not 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 step 14 for all food and beverage items on the participant's 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:

Users 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 to access their recall.
3. Select the **Wrench icon** () to view/edit a recall.
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 a food item was edited, select **Save** at the bottom of the pop-up screen to save any changes.



Note:

Users 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: 57123000 Name: 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.



This tab shows the nutrient values represented in the food item.

Food Code 57123000 Name: 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.**




This tab shows common measures for the food item.

Food Code 57123000 Name: 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 were entered by mistake.



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 the Recall.





Users will be returned to the recalls screen for the adult whose record was just being edited.

Deleting a Recall



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 that needs to be deleted.
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.

Elastic Search

The default search engine used in WebNEERS is powered by a software package called Elasticsearch. Elasticsearch was selected to replace the legacy algorithm (Levenshtein Distance Formula) because of its ability to provide relevant search results in a highly efficient manner. Elasticsearch is a well-tested and highly utilized piece of software that allows WebNEERS developers to take advantage of a community of search experts instead of attempting to build a custom search solution. Elasticsearch is commercially utilized by Abode, Facebook, Etsy, Netflix and many other companies. *(More information can be found here:*

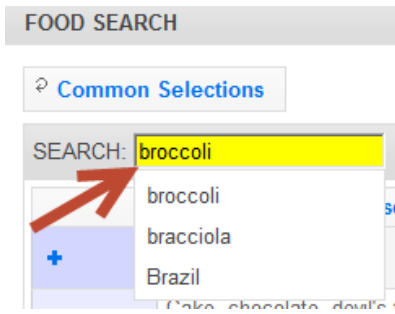
<https://www.elastic.co/blog/found-elasticsearch-from-the-bottom-up>)

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 users search or be used to correct common spelling mistakes.

Example:

1. If a user enters the word “Broccoli”; three (3) suggestions “broccoli, bracciola, and Brazil” will appear.
2. Users can then use the arrow keys on the keyboard or mouse to select the word that best describes/represents the food item they seek,
3. Then, after the item is in the search box, users can hit the enter key on the keyboard to search for results from the selected/corrected word.



Fuzzy Match and Damerau-Levenshtein Distance

If the Fuzzy Match function is activated in a user’s preferences (see Section 2 of the WebNEERS manual), the algorithm is implemented on all searches. This function attempts to return correct results even if characters are accidentally left out. This function works best on words longer than five characters.

A major change to the search function of WebNEERS is that users are now able to turn this fuzzy matching on or off, depending on their search preferences. Previously, fuzzy matching was automatic and occurred by default.

When fuzzy matching is turned on, Elasticsearch utilizes the Damerau-Levenshtein distance formula (an extension of the previously used Levenshtein Distance) to determine if a search query matches an item in the index. This formula calculates the number of edits (additions, deletions, substitutions and transpositions) that are required to make two terms match exactly. For instance, the distance for “apple” and “aple” is 1. Results using this function are returned in order of found foods that have the least distance from the search term.

When the user has fuzzy matching turned off, only exact matches to the term entered will be produced (*for more*

information: https://en.wikipedia.org/wiki/Damerau%E2%80%93Levenshtein_distance).



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 in each region.

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:

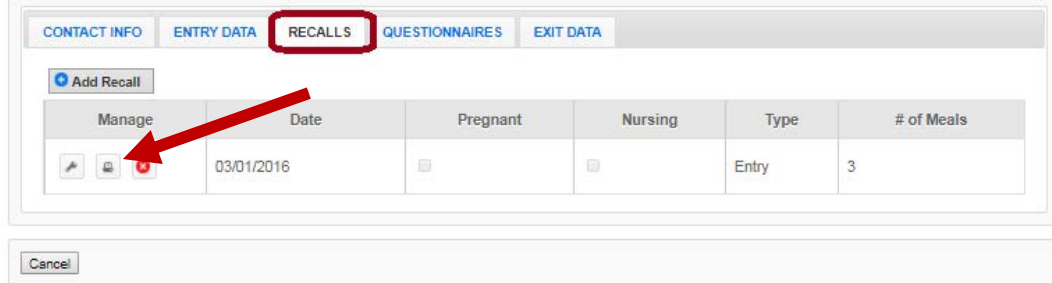
- One Day Recall Report
- One Day Recall Report - Spanish Version
- Food Recall Review

Accessing Diagnostic Reports


Recall diagnostic reports can be accessed in two ways:

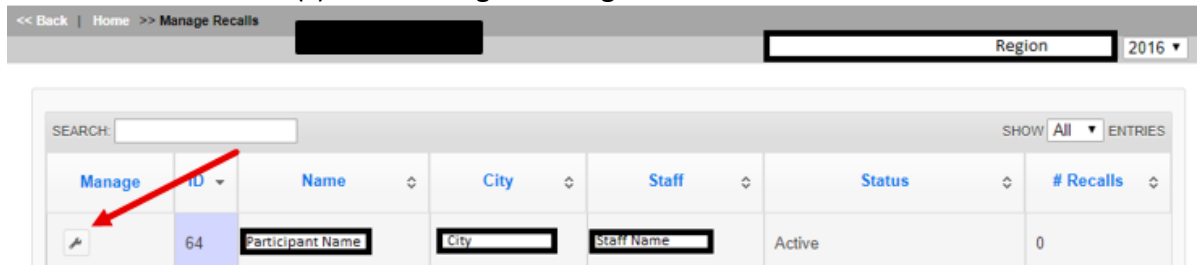
Option 1


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 the recall report is being generate for.

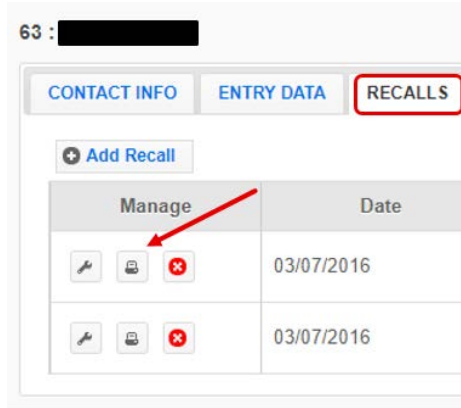


Option 2


1. From the **Manage Recalls** screen, by selecting the **Wrench icon** () to the left of the adult whose recall(s) the user is generating.

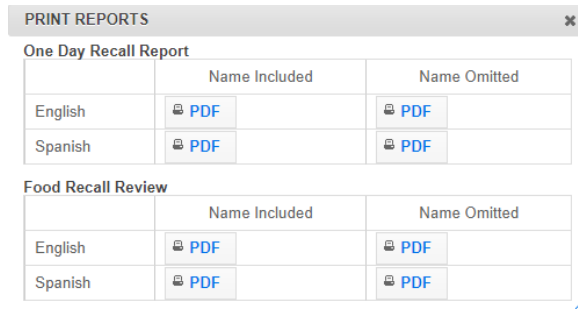


2. Select **Recalls** within the adult's the diagnostic report(s) and then select the **Print icon** () to the left of the recall.

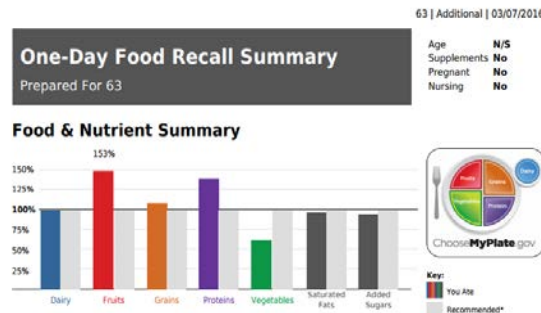


Generate Diagnostic Reports

With either of those options (1 or 2 described above), after clicking on the **Print icon** () to the left of the recall desired, a pop-up screen with the list of reports available will appear in a table format. On this screen users may choose between a **One Day Recall Report** or a **Food Recall Review**.




- The **One Day Recall Report** is a one-page document detailing a summary of the foods and nutrients the participant consumed based on their recall.



- The **Food Recall Review** includes the **One Day Recall Report** as well as healthy eating suggestions that populate based on the participant's food recall, as well as a page detailing how the foods from their recall fit into the food groups.

Select the report option desired.

- Each of these reports may be printed in English or Spanish with the participant name included or omitted. Clicking on the PDF () icon next to the choices to navigate to that document in a new browser window. From there, users may print or save the PDF.




Note:

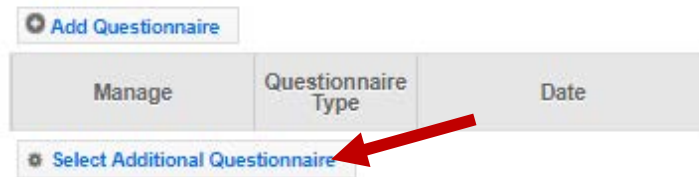
Using the back button in the browser, will return users to the “Contact Info” screen for the participant whose recall report they were viewing.

Managing Questionnaires

The manage questionnaire function enables the user to add, review/edit, or delete Adult Food and Physical Activity Questionnaire 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 reports.

Adding a Questionnaire

1. From the **WebNEERS Home** screen, under **Adults**, select **Manage Questionnaires**.
2. From the **Manage Questionnaires** screen, find the adult.
3. From the **Manage** column, select the **Wrench icon** () icon to edit that record.
4. Select the **Additional Questionnaire** button, if appropriate. Otherwise, skip to step 6.



Note:

See the [Additional Questionnaire Set](#) section for more information.

5. Select the appropriate **Additional Questionnaire Set**, select **OK**.
6. Select **Add Questionnaire**.
 - a. The questionnaire is displayed with the participant’s ID and name.

7. The **Questionnaire Date** will automatically populate based on the entry or exit date.



If the questionnaire date is different from the entry or exit date, manually change the date by:

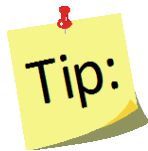
- a. *Type manually - MM/DD/YYYY or*
 - b. *Select the Calendar Icon (📅) and choose the correct date*
8. **Questionnaire Type** will default to **Entry** if it is the first questionnaire entered; **Exit** if it is the second; **Additional** if more than two questionnaires have been entered.



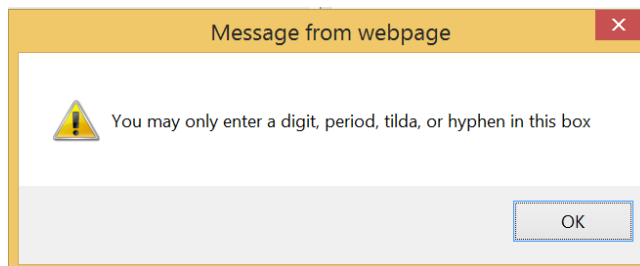
*If the second questionnaire entered is not the **Exit** then it can be changed from **Exit** to **Additional**. To change the Questionnaire Type manually:*

- a. *Select the down arrow (▼) in the Questionnaire Type field.*
- b. *Select the correct Questionnaire Type for the Food and Physical Activity Questionnaire being entered.*

9. Enter the value of the responses to the Food and Physical Activity Questionnaire.⁴



This can be done by choosing the appropriate field or by entering the number reflecting the corresponding answer in the “Response Column.”



- . ~ or – may be used when participants have not provided an answer to a question. A response of N/A or not applicable should only be used for questions that do not apply to participants. For example, using a meat thermometer and cleaning kitchen surfaces after they come in contact with raw meat may not apply to a participant who is vegetarian.*



Additional questionnaires, if selected, will appear directly below the Food and Physical Activity Questionnaire questions. Additional questionnaire questions will only appear if they have been activated at the Institute level.


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

⁴ The Food and Physical Activity Questionnaire must be collected from program participants, with adherence to the Facilitation Protocol. The standardized facilitation protocol ensures that data collected from program participants is collected in the same way across all Land Grant University programs.


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



User will be returned to the questionnaires 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.


Food and Physical Activity Questionnaire Screen

Questionnaire Date
 

Questionnaire Type



Twenty Core Questions

Question	Response	N/A	1	2	3	4	5	6
1 . Eat fruit more often each day	<input type="text" value="-"/>	Please enter a value from 1 to 6						
2 . Eat vegetables more often each day	<input type="text" value="-"/>	Please enter a value from 1 to 6						
3 . Eat red and orange vegetables more often each week	<input type="text" value="-"/>	Please enter a value from 1 to 7						
4 . Eat dark green vegetables more often each week	<input type="text" value="-"/>	Please enter a value from 1 to 7						
5 . Drink regular soda less often	<input type="text" value="-"/>	Please enter a value from 1 to 7						
6 . Drink fruit punch, fruit drinks, sweet tea, or sports drinks less often	<input type="text" value="-"/>	Please enter a value from 1 to 7						
7 . Exercise for at least 30 minutes more days a week	<input type="text" value="-"/>	Please enter a value from 1 to 8						
8 . Strengthen muscles more days a week	<input type="text" value="-"/>	Please enter a value from 1 to 8						
9 . Make small changes to be active more often	<input type="text" value="-"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10 . Wash their hands more often before preparing food	<input type="text" value="-"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11 . Clean items/surfaces more often after contact with raw meat or seafood	<input type="text" value="-"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
12 . Thaw frozen food at room temperature less often	<input type="text" value="-"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
13 . Use a meat thermometer more often	<input type="text" value="-"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
14 . Eat less than wanted less often	<input type="text" value="-"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
15 . Have enough money for food	<input type="text" value="-"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
16 . Cook dinner at home more times a week	<input type="text" value="-"/>	Please enter a value from 1 to 7						
17 . Compare food prices more often	<input type="text" value="-"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
18 . Plan meals before shopping more often	<input type="text" value="-"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
19 . Check cupboard before shopping more often	<input type="text" value="-"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
20 . Make a list before shopping more often	<input type="text" value="-"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>





If an **Additional Questionnaire** is used, it will appear below the Food and Physical Activity Questionnaire survey and above the Cancel and Save tab options (see ← blue arrow above).

Editing a Questionnaire

1. Select **Manage Questionnaires** from the **WebNEERS Home page**.
2. Select the **Wrench icon** () under the **Manage** column to the left of the adult to access their questionnaire .
3. Select the **Wrench icon** () to the left of the questionnaire to edit the questionnaire.
4. Edit/modify the **Questionnaire Data**, as appropriate.
5. Select **Save** at the bottom of the screen to save the edits and exit the questionnaire or **Cancel** to exit without saving.

Note:



User will be returned to the questionnaires 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 Questionnaire

Note:

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

1. Select **Manage Questionnaires** from the **WebNEERS Home page**.
2. Select the **Wrench icon** () under the **Manage** column to the left of the adult whose questionnaire needs to be deleted.
3. Select the **Delete icon** () under the **Manage** column to the left of the questionnaire that needs to be deleted.
4. Select **Ok**, when prompted **“Are you sure you want to delete this questionnaire?”** to delete the questionnaire or select **Cancel** to exit without deleting and return to the list of questionnaires.


Questionnaire Diagnostic Report

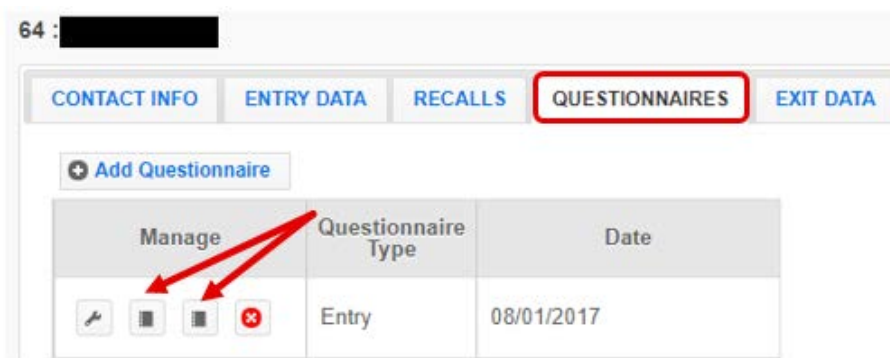
The following reports are available within WebNEERS for use with participants:



- Questionnaire Diagnostic Report
- Questionnaire Diagnostic Report without Participant Name

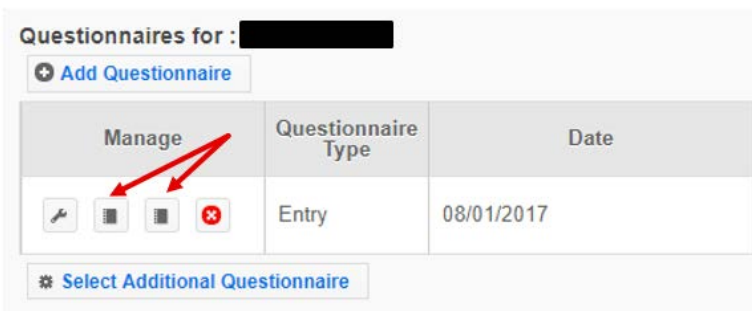
Accessing Questionnaire Diagnostic Report

The Questionnaire Diagnostic Report can be accessed in two ways:

1. From within an **Adult record**, by clicking on the **Questionnaires** tab and selecting one of the two **Report icons** () in the **Manage** column to the left of the questionnaire the diagnostic report is being generated for; the first icon is the full report and the second icon is the same report, without the participant's name.



2. From the **Manage Questionnaires** screen, select the **Wrench icon** () to the left of the adult whose questionnaire(s) the diagnostic report(s) are being generated for and then selecting one of the two **Report icons** () to the left of the questionnaires; the first icon is the full report and the second icon is the same report without the participant's name.



Additional Questionnaire Sets

Additional Questionnaire Sets can be created at the Institute level.

To Create:

1. At the Institute level, select **Manage Adult Questionnaire** from the **WebNEERS Home Page**, under the **Questionnaires** section.
2. Select **Add Adult Questionnaire**.
3. Enter a **Question Set Name**. This is the name that will display in the list of additional questionnaires 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 user would like to add to the Questionnaire 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 does not meet the user's needs, WebNEERS has an advanced feature that allows the creation of Institute question. To learn more about this option, please refer to the [Create Your Own Question instructions](#).

6. Question sets are activated for **Regions** by selecting the appropriate regions listed at the bottom of the page. If a question set is not activated here, it may be activated later by following the details below on [Activating Additional Questionnaire Sets](#).
7. If needed, question sets may be reordered 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 users to the Manage Adult Questionnaires table.

Note:

All available Question Sets are listed in the table. View (), edit (), or delete () the question sets created by selecting the corresponding icon next to the question set.


Note:

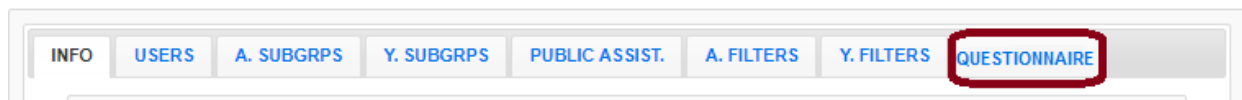
Once a question set is in use by a region, only the report icon () will display next to the question set. This is to ensure data integrity for the reporting period.


To Activate Additional Questionnaire Sets for Regions

Additional Questionnaire 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.




1. Select the **wrench icon** () next to the region the Additional Questionnaire Set is being added to.
2. Select the **Questionnaires** tab.



3. Click the add icon () next to the question set(s) being added to that region. A message will appear asking user to confirm the step 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 user clicks *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 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 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.*

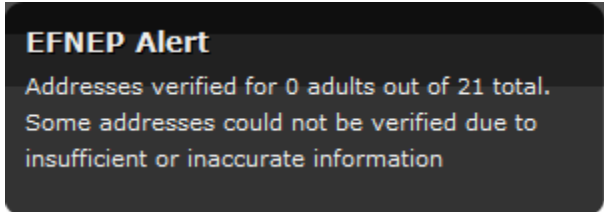
Batch Verification

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.



*If at any time during the process the user closes 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.*




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.



***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** the user 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. 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, 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 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 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** to use to generate the email list.
3. 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 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.

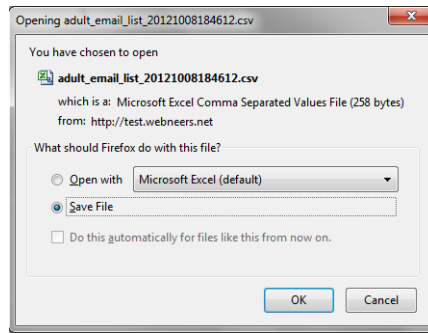
- b. **By Staff Member** returns emails for only the adults associated with the selected staff member.



Note:

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

- 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. This option requires users 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 users to indicate where the file should be saved. Make note of the location where the files is saved so it can be accessed 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 participants 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 users 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** to use to generate the report.
3. 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 a staff member to view or print their report.
 - a. Select the () button at the top of the screen to save or print a PDF copy of the report.
 - b. Use the () buttons on the top right of the data table to:
 - i. **Copy** the data. This allows users 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** to use to generate the report.
3. 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 whose report is being viewed or printed

10. To download the report, select the **Download PDF** button at the top of the screen.



Note:

If the report is downloaded, user will be prompted to select a location to save the file. Make sure to note the location for later access.

Adult Questionnaire Review

The Adult Questionnaire Review Report is available at the Region level. This report can be used to review the questionnaire data for adult participants. It allows a user to quickly compare entry and exit values for questions (Food and Physical Activity

Questionnaire or additional) as well as to see if entry or exit data is missing for each participant.

1. Select **Adult Questionnaire 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.




*If the staff option is selected, select the **Magnifying Glass (Preview) icon** to the left of the staff member to view their report on step 8.*

3. Select **Question Selection**.
 - a. **Food and Physical Activity Questionnaire** – generates the report for the 20 federal questions only.
 - b. **Additional Questionnaire sets** – generates the report for any of the additional questionnaire 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 to view their report, 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** the user want to use to generate the report.
3. If user 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 to view or print their report 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** 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. 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 to include in the 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’ setup at each institution. 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. For example, if user selects a County and a Congressional District along with the 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. 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 Region and Institute levels. 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** to use to generate the report.
3. 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 to view or print their report 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 Entire Unit or Zip Code was selected in step 4, above, select the **Magnifying Glass (Preview) icon** to the right of the report to view the report; If By Staff was selected in step 4, select the **Magnifying Glass (Preview) icon** to the right of the staff person to view their report.
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** to use to generate the report.
3. Select the **Regions** to be included in the report. To view all regions together, select “**Select All**”.



A region selection is required.


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



Congressional Districts, CBSAs and Counties are only available if addresses of the adults were verified by the region level users. 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 to include in the 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’ setup at each institution. They may not be mutually exclusive.



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. For example, if user selects a County and a Congressional District along with the 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. 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** 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 Questionnaire Summary

The Adult Questionnaire Summary Report is available at the Region and Institute levels. It provides the aggregated data and graphics from the adult Food and Physical Activity Questionnaire and Additional Questionnaires.

Region Level

1. Select **Adult Questionnaire Summary** from the **WebNEERS Home page**, under the **Reports** section.
2. Select the **Filter** to use to generate the report
3. 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. 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 to view or print their report in 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 Entire Unit or Zip Code was selected in step 4, above, select the **Magnifying Glass (Preview) icon** to the right of the report to view the report; If By Staff was selected in step 4, select the **Magnifying Glass (Preview) icon** to the right of the staff person to view their report.
7. Select **Reports & Graphs** to be reviewed/printed.
 - a. **Preview Adult Questionnaire Summary Report** – the aggregate of all data from pre and post –education questionnaires, including those who may have exited with an exit code other than “*Educational Objectives Met*”, but still have pre and post-questionnaire 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 Questionnaire Summary** from the **WebNEERS Home page**, under the **Summary Reports** section.
2. Select the **Filter** the user 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. 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 to include in the 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' user 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. For example, if user selects a County and a Congressional District along with the 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. 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 it.
8. Select the **Preview Adult Questionnaire Summary Report button** to view the report or Select the **Graph buttons** to view graphs for Improved Practices or Desirable Practices (see [Region level](#) 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 [Region](#) and [Institute levels](#). It can be used to view the list of Federal, Institute and Region Adult subgroups available to that user.



Note:

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 **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 Region and Institute levels. It can be used to view the list of Federal, Institute and Region Adult filters available to that user.



Note:

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 **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 Questionnaire Summary – Institute Level

The Browse Adult Questionnaire Summary screen provides a snapshot of the number of adults with entry and exit Food and Physical Activity Questionnaire surveys, and if used Additional Questionnaire sets, 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 Questionnaire Summary** from the **WebNEERS Home page**, under the **Browse** section.
2. The data will be displayed on the screen.

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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 Region level 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 Institute and the Federal levels, the data entry person is key to an accurate, comprehensive, and quality report.

Managing Youth Groups

Youth group 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), individual 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>

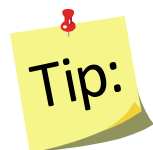
2. Select **Manage Youth Groups** from the **WebNEERS Home page**
3. Select **Add Youth Group**
4. Select a **Staff Member** from the list of available staff



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*

The screenshot shows a web form for selecting a staff member. It includes a dropdown menu labeled "Staff Member" with the text "--Staff By Name--" and a downward arrow. Below this is a text input field labeled "Custom ID". Underneath is another dropdown menu labeled "Youth Group Default" with the text "--Select Default--" and a downward arrow. At the bottom of the form are two buttons: "Cancel" and "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. Do not Save at this point. The record will not save until the **ENTRY DATA** is added.



Note:

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:

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.

Delivery Modes and Definitions

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**

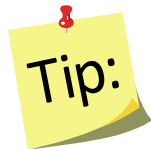


Youth Graduates are defined by the institution. Criteria used to determine graduates will vary among institutions. For EFNEP, It should include completion of pre- and post- checklists, but may also include number of lessons attended or other requirements.

CONTACT INFORMATION	LEADERS	ENTRY & EXIT DATA	DEMOGRAPHICS	YOUTH CHECKLIST
Start Date 09/16/2014		End Date 01/06/2015		
Program A EFNEP		Number of Lessons 9		
Delivery F 4-H Special Interest / Short-Term Programs		Number of Sessions 9		
Subgroups <input type="checkbox"/> R:3rd Grade <input type="checkbox"/> R:4th Graders - BOSB		Number of Hours 7.5		
		Number of Graduates 8		

DEMOGRAPHICS Tab

CONTACT INFORMATION	LEADERS	ENTRY & EXIT DATA	DEMOGRAPHICS	YOUTH CHECKLIST
----------------------------	----------------	------------------------------	---------------------	------------------------



Tip: 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	<input type="text" value="0"/>
Male	<input type="text" value="0"/>
Total	<input type="text" value="0"/>

Youth By Residence

Farm	<input type="text" value="0"/>
< 10,000 & Rural	<input type="text" value="0"/>
10,000-50,000	<input type="text" value="0"/>
Suburbs > 50,000	<input type="text" value="0"/>
City > 50,000	<input type="text" value="0"/>
Total By Residence	<input type="text" value="0"/>

Youth By Grade

Pre-K	<input type="text" value="0"/>
K	<input type="text" value="0"/>
1st Grade	<input type="text" value="0"/>
2nd Grade	<input type="text" value="0"/>
3rd Grade	<input type="text" value="0"/>
4th Grade	<input type="text" value="0"/>
5th Grade	<input type="text" value="0"/>
6th Grade	<input type="text" value="0"/>
7th Grade	<input type="text" value="0"/>
8th Grade	<input type="text" value="0"/>
9th Grade	<input type="text" value="0"/>
10th Grade	<input type="text" value="0"/>
11th Grade	<input type="text" value="0"/>
12th Grade	<input type="text" value="0"/>
Special	<input type="text" value="0"/>
Total by Grade	<input type="text" value="0"/>

Total Youth By Race / Ethnicity

		Not Hispanic / Latino	Hispanic or Latino	Not Provided	Total By Race
Only One Race	AI or AN	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
	Asian	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
	Black	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
	NH or OPI	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
	White	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
	Not given	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Multiple Races	AI or AN and White	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
	Asian and White	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
	Black and White	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
	AI or AN and Black	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
	All Others	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Total by Ethnicity		<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input style="background-color: yellow;" type="text" value="0"/>

Race Subcategories

Total Youth with Subraces

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

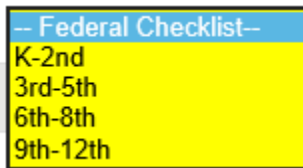
LEADERS

ENTRY & EXIT DATA

DEMOGRAPHICS

YOUTH CHECKLIST

1. Select the appropriate Federal Checklist (age appropriate) from the -- **Federal Checklist** -- dropdown



Note:

This step must be completed before clicking on the Add Checklist button.

2. Select the appropriate **Institute Checklist**, from the -- **Institute Checklist** -- dropdown, 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.

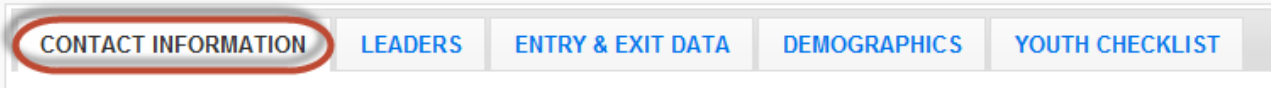


Note:

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.

CONTACT INFORMATION	LEADERS	ENTRY & EXIT DATA	DEMOGRAPHICS	YOUTH CHECKLIST						
Checklists <input type="button" value="+ Add Checklist"/> <input type="text" value="-- Federal Checklist--"/> <input type="text" value="-- Institute Checklist--"/>				<div style="border: 2px solid red; border-radius: 15px; padding: 5px;"> <table border="1"> <tr> <td>Number of Youth:</td> <td>10</td> </tr> <tr> <td>Number of Checklists:</td> <td>4</td> </tr> <tr> <td>Matched Checklists:</td> <td>0</td> </tr> </table> </div>	Number of Youth:	10	Number of Checklists:	4	Matched Checklists:	0
Number of Youth:	10									
Number of Checklists:	4									
Matched Checklists:	0									

Select the **CONTACT INFORMATION** tab



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.

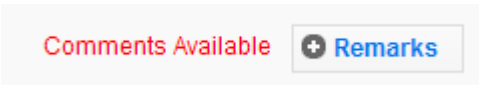
Remarks


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 

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



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 Information, Leaders, Entry & Exit Data, and Demographics) so it does not need to be clicked more than once. It will also return the user to the Manage Youth Groups screen.*

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



Note:

After a youth group has been deleted it cannot be restored.

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.

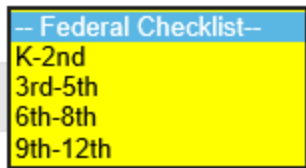
The manage checklist function enables the user to add, review/edit, or delete checklist surveys contained within **WebNEERS** without having to access all data entered on the youth group. This is also a way to quickly access and print Youth Group Checklist Summary reports.

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



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



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.



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.





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 ().

SEARCH:	SHOW <input type="text" value="All"/> ENTRIES				
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.

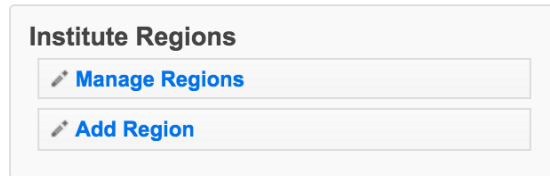
6. You may activate the question set for **Regions** now by selecting the appropriate regions listed at the bottom of the page. If you do not activate the question set here, you may activate the question set later by following the details below on how [To Activate for Regions](#).
7. If needed, reorder 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.

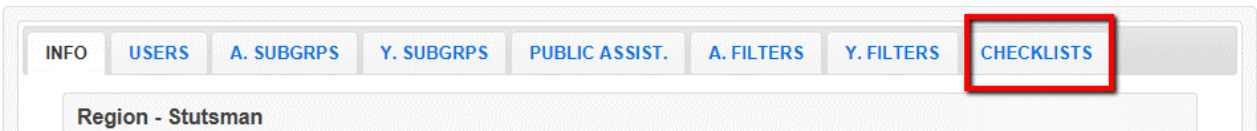
Note: Once a question set is in use by a region, only the report icon (📊) will display next to the question set. This is to ensure data integrity for the reporting period.


To Activate Question Sets for Regions:

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




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



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 before 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.



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:

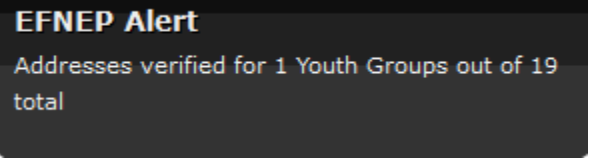
The Verify Address button is only available after the youth group record is saved.

Address Verification	
County	FIPS
<input type="text"/>	<input type="text" value="0"/>
Congressional ID	CBSA
<input type="text" value="0"/>	<input type="text" value="0"/>
Longitude	Latitude
<input type="text"/>	<input type="text"/>
<input type="button" value="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 Region level. 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. 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 **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




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 run the email list or **Cancel** to exit without viewing it




Note:

*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



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–



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

Group Leader Summary

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



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.

Youth Checklist Review

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



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.



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.

Youth Checklist Summary

The Youth Checklist Summary Report is available at the Region and the Institute levels. 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



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.

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.



Note:

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

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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 Region and Institute Level users are outlined below.

Steps for Region Level Users


1. Log in as a Region Level 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.




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'. [If not, skip View Youth Errors.](#)
- 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, [skip to View Staff Errors.](#)
- 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

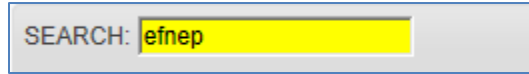
Steps for Institute Level Users

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**”



The screenshot shows a web interface with a 'Browse' section. Under the 'Adult' category, there are three buttons: 'Browse Adult Summary', 'Browse Adult Diet Summary', and 'Browse Adult Checklist Summary'. A red arrow points to the 'Browse Adult Summary' button. Below the 'Adult' section are the 'Youth' and 'Staff' sections, each with their respective summary buttons.

- b. Type EFNEP (or SNAP-Ed) in the search box to filter the results by program

A screenshot of a search box with a light blue border and a grey background. The text "SEARCH: efnep" is displayed in a yellow highlighted area within the box.

- 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**.



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

Options	Year	Start Date	End Date	Status
	2013	10/1/2012	9/30/2013	Not Submitted

- 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

Online Help Desk | WebNEERS Manuals | @gmail.com (Institute User) | 26:19 | Logout



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

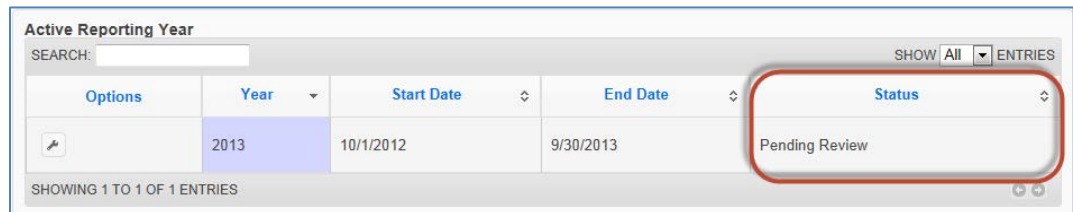
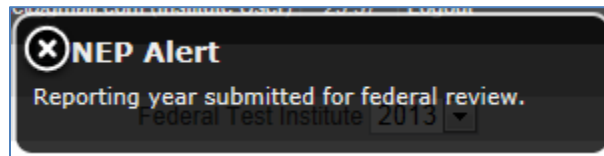


*If you see a message on the “DATA SUBMISSION” that that says, ‘You must make this reporting year active in order to submit it’, click the “Cancel” button to return to the **Manage Reporting Years** screen and follow the steps above to make the year you want to submit active*

7. Click “OK” to submit the data or “Cancel” to cancel the submission

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”.



Options	Year	Start Date	End Date	Status
	2013	10/1/2012	9/30/2013	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.



Note:

*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.*

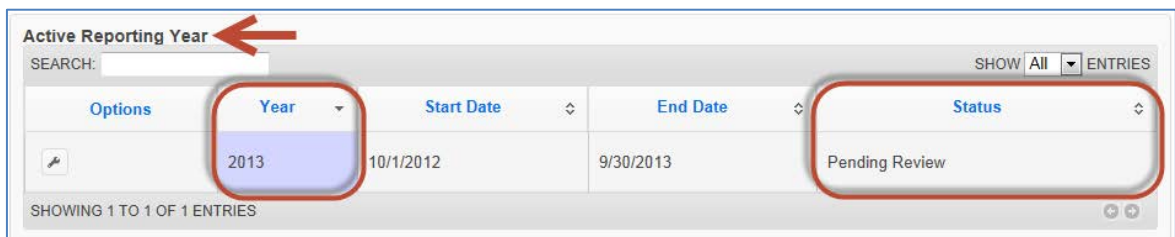
Failed Submission

- 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](#).

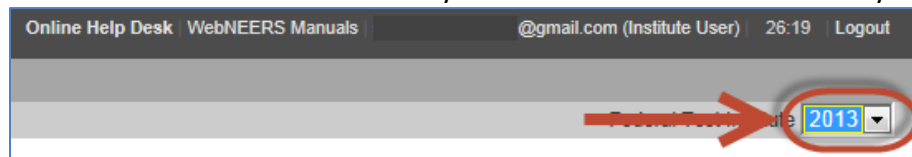
Cancel Data Submission

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



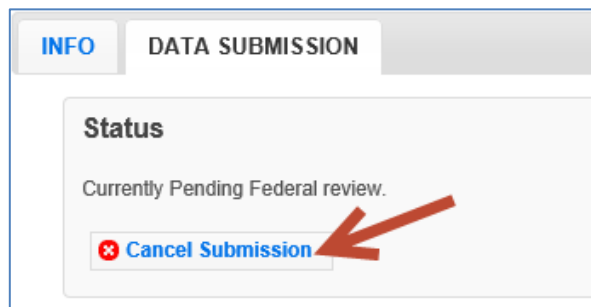
Note:

*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

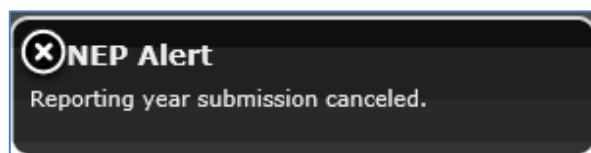


6. Click the “**Cancel Submission**” button to cancel the submission



*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 Region Level 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”



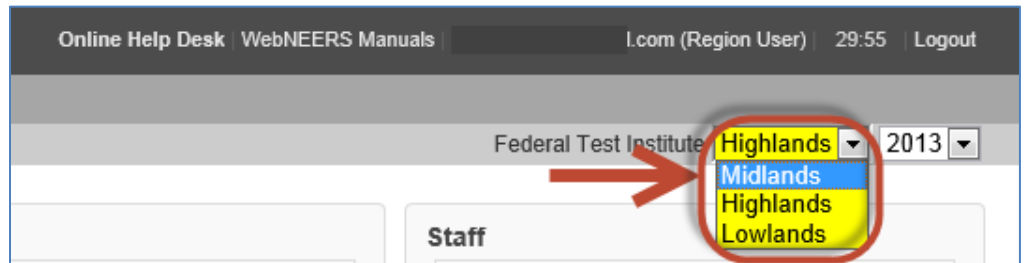
Note:

If any of the revision requests are unclear, contact the [help desk](#).

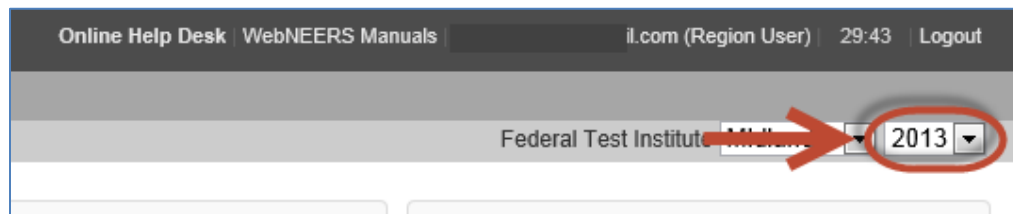
Make Revisions at Region Level

After you determine the issues, you need to work with your Region Level users to make revisions. These are the steps they need to complete.

1. Log in as a Region Level 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 Institute Level 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

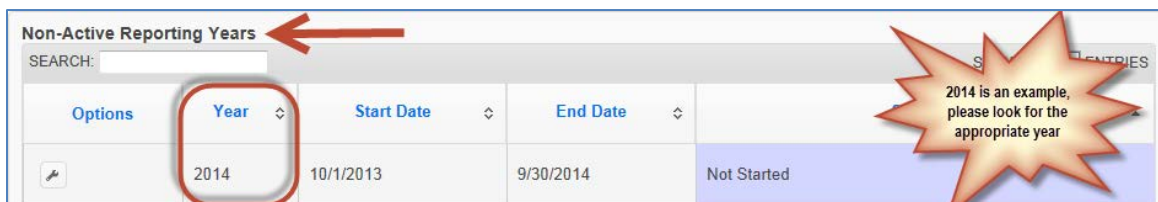
Resubmit the Revised Data

1. Log in as an Institute Level 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 Institute Level 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 Institute Level does not setup the regions for the new year. The Region Level 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 Institute Level 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



Non-Active Reporting Years				
SEARCH:	Year	Start Date	End Date	
	2014	10/1/2013	9/30/2014	Not Started

EFNEP users:

- The new reporting year will not be visible until the Federal Level 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 start of the new fiscal year. If the new reporting year is not visible by October 10th, 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



- 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.

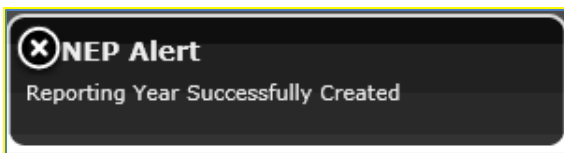
- Confirm that selections are correct and click **“Begin Reporting Year”**



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

- You will get an alert message that the reporting period was successfully started and the **“DATA SUBMISSION”** tab will appear



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

Options	Year	Start Date	End Date	Status
	2014	10/1/2013	9/30/2014	Not Submitted



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

13. If needed, **Add New Regions**



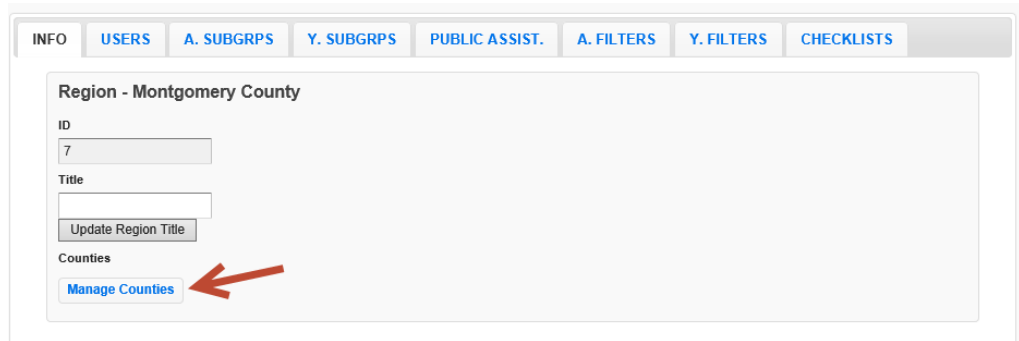
Note:

*If you need to edit a region, click “**Manage Regions**” and then 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)

- i. Click **Add Region**
- ii. Enter **Region Name**
- iii. Click “**Add**”

- iv. Click "**Manage Counties**" to select counties from your state/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.



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 Institute Level user
2. Click on **View Users**
3. Click the “” icon for the Region Level 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 Region Level users you want to give permission to migrate regional data

Setup Region(s) in the New Reporting Year (EFNEP & SNAP-Ed)

After the Institute Level successfully starts the new reporting year, he/she should work with Region Level 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:

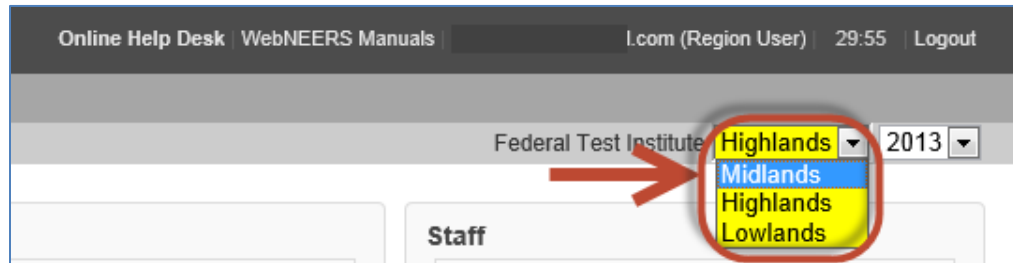
- Adults who are part of the new year, including their recall and checklist data
- Youth groups which are part of the new year, including their checklist data
- Region Level subgroups, filters, public assistance programs, and defaults

Existing staff and volunteers as well as Institute Level subgroups, filters, public assistance programs, and additional checklist question sets are available to the region as soon as the Institute Level user completes the steps to include the region as part of the new reporting year. This means Region Level users can access certain items whether they complete the steps for migration or not.

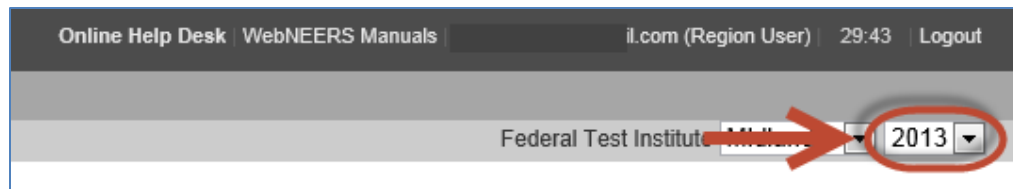


*You can skip **Part I** if you do not wish to bring any regional data (adults, youth groups, subgroups, filters, public assistance programs, defaults) forward from the previous year or if an Institute Level user has asked you to wait to migrate your data until the previous year’s data has been approved by the Federal Office (EFNEP only).*

1. Log in as a Region Level user
2. At the top, confirm that the correct region is selected
 - If not, use the region dropdown to select the appropriate region

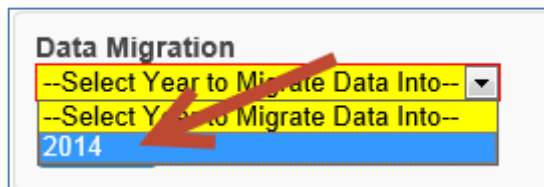


3. At the top, confirm that the previous reporting year is selected
 - If not, use the year dropdown to select the appropriate year and click “OK” to confirm that you want to switch to a different year



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 Institute Level 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 Institute Level 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: *Note: data migration can only be completed once per region*

6. Click on the “**Migrate**” button

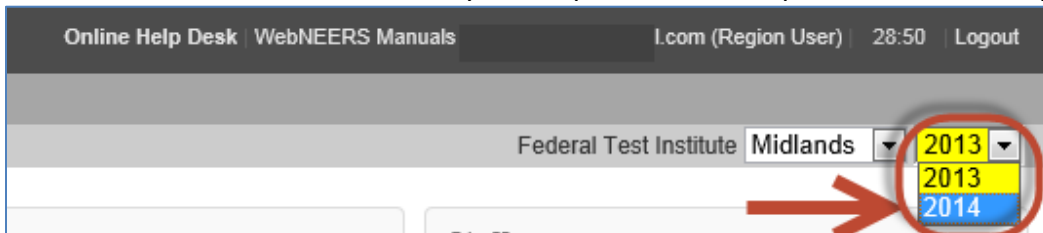


Note: *The migration process can only be completed once. Therefore, it is important to make sure your previous year’s data is accurate and complete before confirming the migration.*

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 [help-desk](#). 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



Note: *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



Note: *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 Institute Level 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

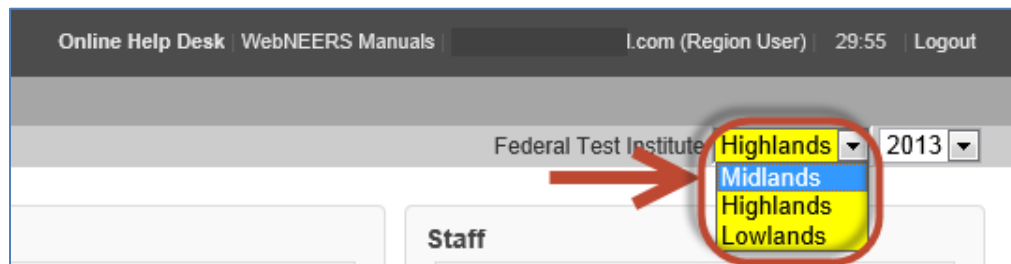
At any point, Institute Level and Region Level users can return to a previous year to download their data export files or to view/print reports. Instructions are below.

Note:

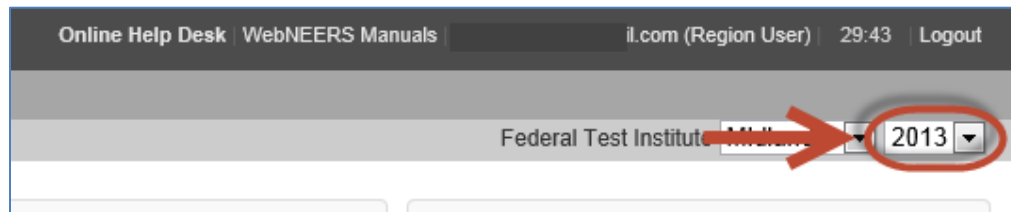
Institute Level and Region Level users do not have to be attached to the same year at the same time. The system is set up to accommodate users being attached to different years. Users can also move back and forth between years at any time.

Steps for Region Level Users

1. Log in as a Region Level 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.

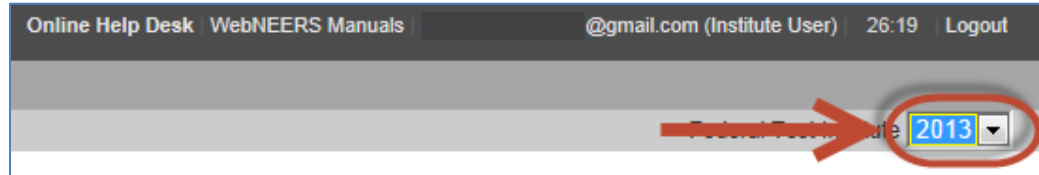
4. Download data export files or view/print reports, as needed
5. Use the year dropdown next to the name of your university (on the top right of your screen) to return to the current year to ensure that new data is entered into the correct database

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 Region Level users run the risk of entering data into the incorrect database.

Steps for Institute Level Users

1. Log in as an Institute Level 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 Institute Level users will not be able to preview and manage the current year’s data, users and other reporting.

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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. <u>**Please Migrate the Approved Plan to complete the Annual Update.</u>
Due Date	July 1 st	July 1 st
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.



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.

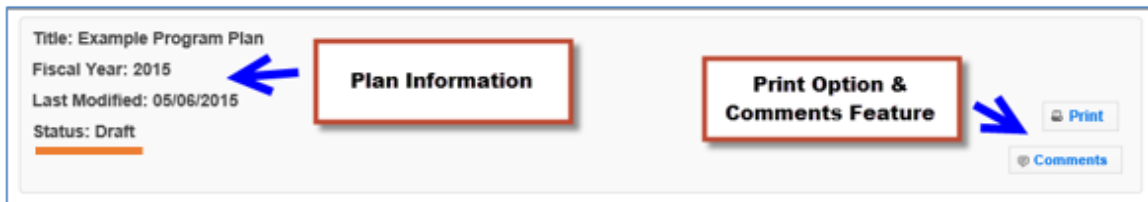
Alternatively, if the incoming Director/Administrator **chooses to review the annual update**, then coordinators should **clone the previous year's file, migrate the cloned file and edit the annual update**. Cloning will remove the previous administrator's signature. Coordinators can edit the name in 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.

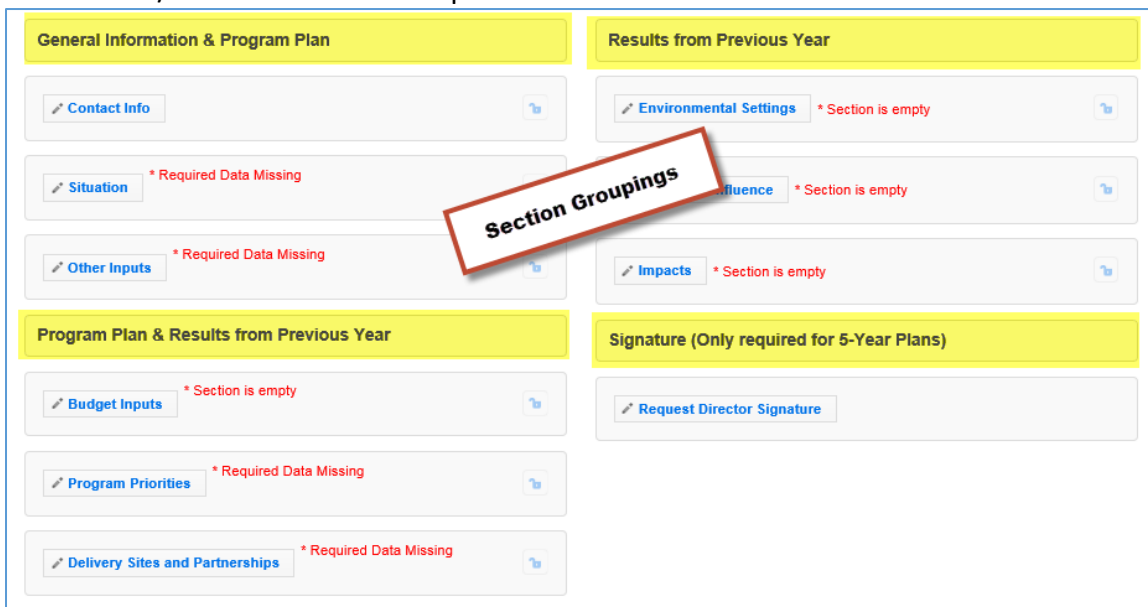
Top Section – Main Plan Page



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. General Information and Program Plan – The buttons under this heading capture the contact information for the program and the overview of intended accomplishments in upcoming years.

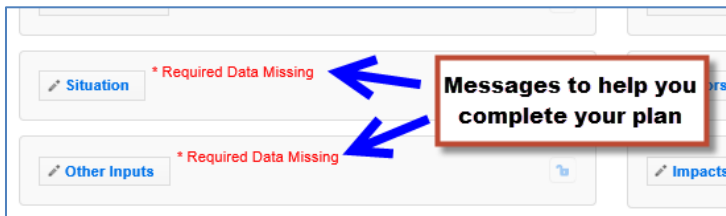
2. Program Plan and Results from Previous Year – The buttons under this heading serve a dual purpose. They provide an overview of intended accomplishments in upcoming years, as well as report some of the results achieved.
3. Results from Previous Year – The buttons under this heading report results from the previous year.
4. Director Signature – The button under this heading is used to secure your Extension Director or Administrator’s signature.



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

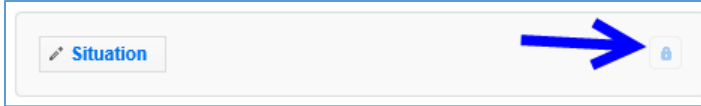
The center section includes **red asterisk messages** are alerts to sections within which required data is missing and to sections that are empty. A plan cannot be submitted if required data is missing. If **no red asterisk messages** is present, the plan can be submitted. Those sections are optional; the message serves as a visual cue that something additional can be included. Red asterisk messages disappear when addressed.



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.



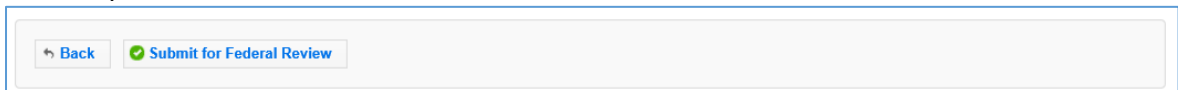
Locked sections prevent users from making edits. For plans that are:

- 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”.



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

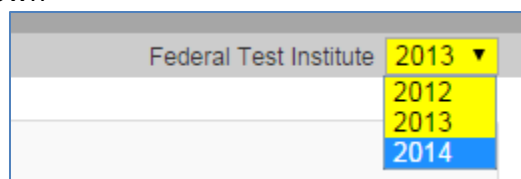
The Annual Update/5-Year Plan can be edited by any Institution Level user who has permission to access the **Manage Annual Update Section**. If someone is already editing a section, a message will display at the top of the screen. When this happens, close the section and wait for the other user to finish. 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.



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





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.

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 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.

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.

Note:

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.

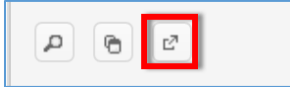
1. As an Institution Level user, use the dropdown to select the year containing the Annual Update/5-Year Plan you wish to migrate forward into the current reporting year.


Federal Test Institute	2013 ▼
	2012
	2013
	2014



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)

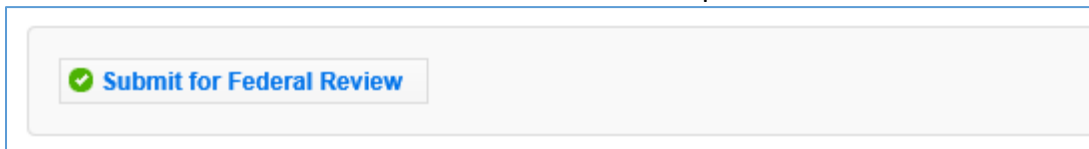
SECTION	WHAT YOU NEED TO DO
Contact Info	Review for accuracy. If changes are needed, unlock the tab and make them. If not, continue to the next section.
Situation	Review for accuracy. Think about what you intend to do in the coming year. If changes are needed, unlock the tab and make them. If not, continue to the next section.
Other Inputs	<p>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.</p> <p><i>Use of Technology:</i> 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.</p> <p><i>Use of Volunteers:</i> 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.</p>
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.



***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



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.



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.



*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



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.



Pre-Approved Sections

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 “  ” 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

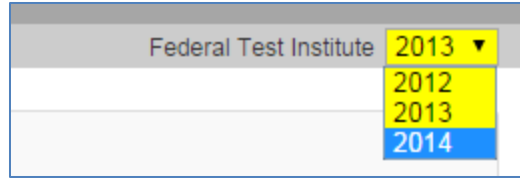
Sections you need to Update Each Year

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

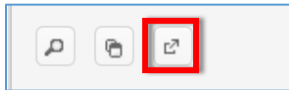
WebNEERS Instructions

1. Log in as an Institution Level 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

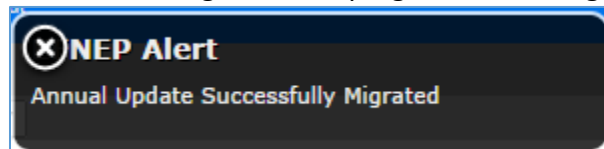


The years listed in your dropdown may vary from the screenshot above.

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

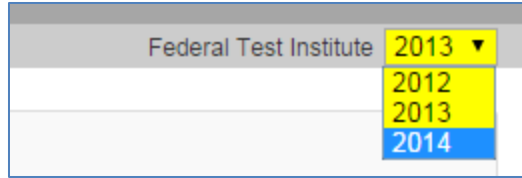


Sometimes the alert message is quick, if you do not see it, try moving on to step 9. If your plan is not listed in the year you tried to migrate it into, return to step 2 and try again! If you get a red alert message, contact the [help desk](#) for assistance.




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: <input type="text"/>		SHOW <input type="text" value="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

The screenshot shows a web interface for plan management. The main heading is "General Information & Program Plan". Below this heading are several rows of buttons, each with an edit icon (pencil) and a preview icon (eye). The buttons are: "Contact Info", "Situation" (with a red warning "* Required Data Missing"), "Other Inputs" (with a red warning "* Required Data Missing"), "Budget Inputs" (with a red warning "* Section is empty"), "Program Priorities" (with a red warning "* Required Data Missing"), "Delivery Sites and Partnerships" (with a red warning "* Required Data Missing"), "Environmental Settings" (with a red warning "* Section is empty"), "Sectors of Influence" (with a red warning "* Section is empty"), "Impacts" (with a red warning "* Section is empty"), and "Request Director Signature".

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 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.



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 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.

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	<p>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)</p> <p><i><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.</i></p> <p><i><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.</i></p>
Geographic Area	<p>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.</p>
Description of Geographic Area	<p>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)</p>

Name of the Field	Description
Target Audience	<p>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)</p> <p> Note: For EFNEP, this must include programming to low-income families and low-income youth. For further information see EFNEP's Policy Document.</p>

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

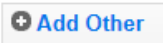
1. From the main plan page, click on the **OTHER INPUTS** button.
2. Enter/revise the narrative description of your **Curricula**.



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 “  ” button to add additional organizations not listed in the chart.
5. Enter/revise the narrative **Description of Inter-Organizational Relationships**.





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
<p>Curricula</p>	<p>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)</p> <p><i>Core areas (EFNEP): Diet Quality/Physical Activity, Food Resource Management, Food Safety, Food Security</i></p> <p> <i>Note: This should not be an exhaustive list of curricula, but rather a list of the primary curricula used across the state/territory.</i></p> <p> <i>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.</i></p> <p>If technology will be used, indicate the level of implementation and strategies you plan to use.</p>

Name of the Field	Description
Inter-Organizational Relationships	<p>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".</p> <ul style="list-style-type: 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	<p>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).</p> <p>If volunteers will be used, indicate the types of volunteers and their duties.</p>

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.



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

The screenshot displays a web interface for a plan page. It is divided into two main columns. The left column contains three sections: 'General Information & Program Plan' with buttons for 'Contact Info', 'Situation' (marked '* Required Data Missing'), and 'Other Inputs' (marked '* Required Data Missing'); and 'Program Plan & Results from Previous Year' (highlighted with a blue border) with buttons for 'Budget Inputs' (marked '* Section is empty'), 'Program Priorities' (marked '* Required Data Missing'), and 'Delivery Sites and Partnerships' (marked '* Required Data Missing'). The right column contains 'Results from Previous Year' with buttons for 'Environmental Settings' (marked '* Section is empty'), 'Sectors of Influence' (marked '* Section is empty'), and 'Impacts' (marked '* Section is empty'); and a 'Signature' section with a 'Request Director Signature' button.

Budget Inputs

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 **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	<p>Please enter other sources of funding received during the last Fiscal Year. Do not include funds captures in the Federal Budget Sheet.</p> <ul style="list-style-type: none"> • <i><u>Other Federal</u>: includes funding from other Federal programs/agencies - not EFNEP. Examples are other Federal grants and contracts.</i> • <i><u>Other Public</u>: includes non-Federal funds. Examples are State and Local government and university grants, contracts, and cash contributions.</i> • <i><u>Other Private</u>: 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.</i> • <i><u>In-Kind</u>: includes cash estimates of non-cash donations. Examples are food, transportation, and agency staff time.</i>
Description of Other Funds Received	Please discuss any plans/strategies to maintain or to increase other sources of funds in upcoming years.

Program Priorities

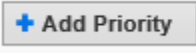

Annual Update Years: *If you migrate your plan, this section is unlocked, but is pre-populated with the information from the previous year. You need to update the “actual” value in the data chart each year, and revise other sections as needed.*



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 PRIORITIES** button.
2. Click “  ” 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 “  ” 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.

Select	Options	Title
<input type="checkbox"/>	 	Example Program Priority



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	<p>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.</p> <p><u>Core areas:</u> Diet Quality/Physical Activity, Food Resource Management, Food Safety, Food Security.</p> <p><u>Secondary areas:</u> Family/Interpersonal Relationships, Management/Leadership, Sectors of Influence, Environmental Settings.</p> <div style="border: 1px solid black; padding: 5px; width: fit-content; margin-top: 10px;"> <p>Note: <i>Secondary areas should not be the focus of your nutrition education program. They can support program goals, but should not be programmatic content areas.</i></p> </div>

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 unlocked and is 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.



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

The screenshot shows a web interface with several sections. The 'Results from Previous Year' section is highlighted with a blue border and contains three buttons: 'Environmental Settings' (with a red asterisk and '* Section is empty'), 'Sectors of Influence' (with a red asterisk and '* Section is empty'), and 'Impacts' (with a red asterisk and '* Section is empty'). Other sections include 'General Information & Program Plan' with buttons for 'Contact Info', 'Situation' (with a red asterisk and '* Required Data Missing'), and 'Other Inputs' (with a red asterisk and '* Required Data Missing'); 'Program Plan & Results from Previous Year' with buttons for 'Budget Inputs' (with a red asterisk and '* Section is empty'), 'Program Priorities' (with a red asterisk and '* Required Data Missing'), and 'Delivery Sites and Partnerships' (with a red asterisk and '* Required Data Missing'); and a 'Signature' section with a 'Request Director Signature' button.

Environmental Settings

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 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.

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.

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.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Commit to collaborate to address identified needs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conduct needs assessment to determine the extent of concern and potential for resolution.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Form partnerships or coalitions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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



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.

Community Partnership Impacts

SEARCH: SHOW 10 ENTRIES

Select	Options	Title	Stage	Term	Type	Focus	Participant Type	Site(s)
<input type="checkbox"/>		TEST: Healthy Schools in Midland	Maintenance	Environmental Settings	Long	Diet Quality, Food Security	Adult	1

SHOWING 1 TO 1 OF 1 ENTRIES

3. Click on the tab for **Diet Quality** tab in the **Medium Term Indicators** section.

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](#)

Community Partnership Impacts

SEARCH: SHOW 10 ENTRIES

Select	Options	Title	Stage	Term	Type	Focus	Participant Type	Site(s)
No data available in table								

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.

Community Partnership Impacts

SEARCH: SHOW 10 ENTRIES

Select	Options	Title	Stage	Term	Type	Focus	Participant Type	Site(s)
<input type="checkbox"/>	+	TEST: Healthy Schools in Midland	Maintenance	Environmental Settings	Long	Diet Quality, Food Security	Adult	1

SHOWING 1 TO 1 OF 1 ENTRIES

8. Click on the tab for **Diet Quality** in the **Long Term Indicators** section.

See screenshot on following page.

Screenshot – step 8 above.

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](#)

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

[Previous](#) [Next](#)

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.

Community Partnership Impacts

SEARCH: SHOW 10 ENTRIES



Select	Options	Title	Stage	Term	Type	Focus	Participant Type	Site(s)
<input type="checkbox"/>	Add Edit	TEST: Healthy Schools in Midland	Maintenance	Environmental Settings	Long	Diet Quality, Food Security	Adult	1

SHOWING 1 TO 1 OF 1 ENTRIES

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	<p>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.</p> <p><i>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.</i></p>

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	<p>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.</p> <p> Note: <i>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.</i></p> <p> Note: <i>If your community partnership impact is selected for use at the Federal level, the text may be edited to fit the space.</i></p>

**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 unlocked, 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 **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 <input style="width: 50px;" type="text"/>
Government Agencies	0 <input style="width: 50px;" type="text"/>
Business/Industry	0 <input style="width: 50px;" type="text"/>
Non-Profit Agencies	0 <input style="width: 50px;" type="text"/>
Other	0 <input style="width: 50px;" type="text"/>

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.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Convene taskforces, expert committees, or advisory groups to determine the extent of concern and potential for resolution.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Commit to collaborate and communicate within and across sectors to address identified needs and determine respective roles of responsibility.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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.

Community Partnership Impacts

SEARCH:

SHOW 10 ENTRIES

Select	Options	Title	Stage	Term	Type	Focus	Participant Type	Site (s)
<input type="checkbox"/>		TEST: Healthy Schools in Midland	Maintenance	Environmental Settings	Long	Diet Quality, Food Security	Adult	1

SHOWING 1 TO 1 OF 1 ENTRIES

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 “ **Add Other** ” 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

Community Partnership Impacts

SEARCH:

SHOW 10 ENTRIES

Select	Options	Title	Stage	Term	Type	Focus	Participant Type	Site (s)
<input type="checkbox"/>		TEST: Healthy Schools in Midland	Maintenance	Environmental Settings	Long	Diet Quality, Food Security	Adult	1

SHOWING 1 TO 1 OF 1 ENTRIES

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 “ **Add Other** ” 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

Community Partnership Impacts

SEARCH:


SHOW 10 ENTRIES



Select	Options	Title	Stage	Term	Type	Focus	Participant Type	Site (s)
<input type="checkbox"/>		TEST: Healthy Schools in Midland	Maintenance	Environmental Settings	Long	Diet Quality, Food Security	Adult	1

SHOWING 1 TO 1 OF 1 ENTRIES

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	<p>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.</p> <p><i>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.</i></p> <p>EFNEP's role is to appropriately inform and influence the sectors, specifically:</p> <ul style="list-style-type: none"> • 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). <p> Note: <i>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.</i></p>
Organizational Involvement	<p>For the examples you select, indicate the number of other organizations involved. Indicate all that apply.</p>
Short Term Indicators*	<p>Sector representatives identify and define social structure and policy relevant issues.</p>
Medium Term Indicators*	<p>Sector representatives influence action.</p>
Long Term Indicators*	<p>Conditions improve within and across states.</p>

Name of the Field	Description
Community Partnership Impacts	<p>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.</p> <p> Note: <i>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.</i></p> <p> Note: <i>If your community partnership impact is selected for use at the Federal level, the text may be edited to fit the space.</i></p>




***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.



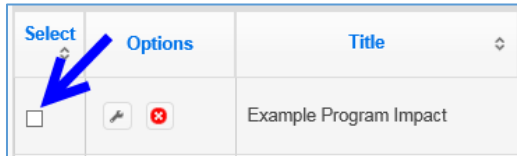
Note:



*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.*



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**.



Select	Options	Title
<input type="checkbox"/>	 	Example Program Impact

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	<p>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.</p> <p> Note: <i>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.</i></p> <p> Note: <i>If your program impact is selected for use at the Federal level, the text may be edited to fit the space.</i></p>
Community Partnership Impacts	<p>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.</p> <p> Note: <i>If your qualitative example is selected for use at the Federal level, the text may be edited to fit the space.</i></p>

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

The screenshot displays a web interface for a plan page, organized into two columns. The left column contains sections for 'General Information & Program Plan' and 'Program Plan & Results from Previous Year'. The right column contains sections for 'Results from Previous Year' and a highlighted 'Signature' section. Each section includes a button with a pencil icon and a status indicator. The 'Signature' section is highlighted with a blue border and contains a button labeled 'Request Director Signature'.

Section	Status
Contact Info	
Situation	* Required Data Missing
Other Inputs	* Required Data Missing
Budget Inputs	* Section is empty
Program Priorities	* Required Data Missing
Delivery Sites and Partnerships	* Required Data Missing
Environmental Settings	* Section is empty
Sectors of Influence	* Section is empty
Impacts	* Section is empty
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 locked and is pre-populated 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:

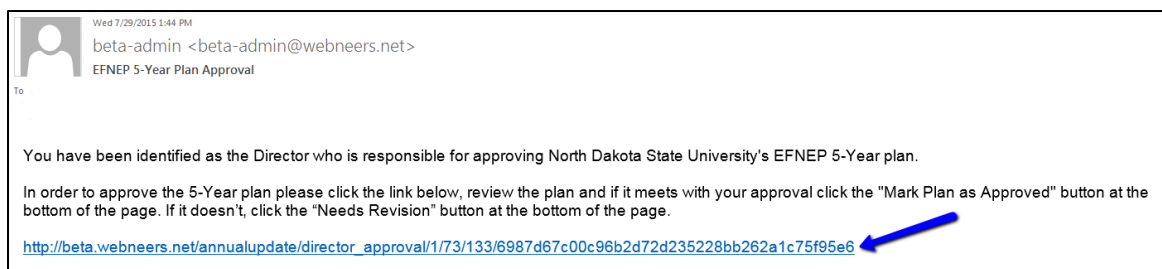
As soon as your Director clicks “approve” your plan will be submitted to the Federal Office. This happens automatically.



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.

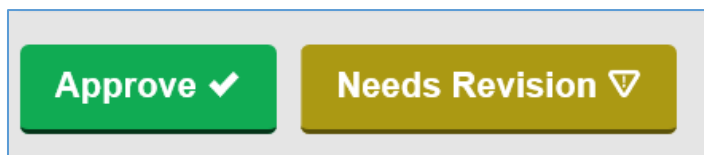
Director Instructions

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.



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.”**



*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.*

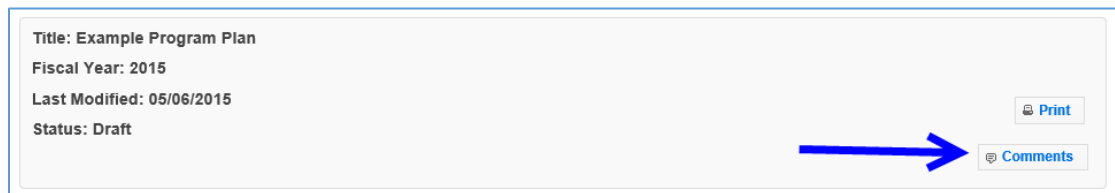
Comments (optional)

The **Comments** feature (button on top right of main plan page) allows two-way communication between the Institution Level submitter and the Federal Level 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.

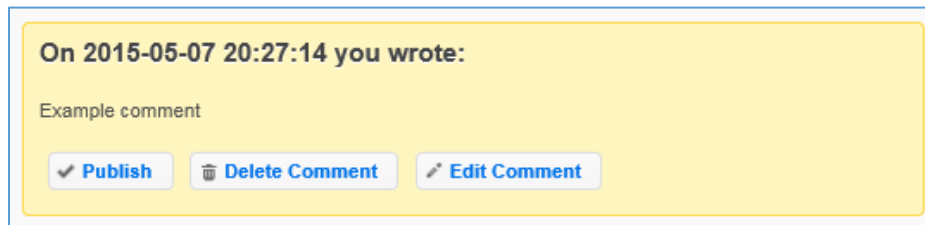
Annual Update Years: *If you migrate your plan, all institution and federal comments from previous years will be visible.*

WebNEERS Instructions

1. From the main plan page, click on the **Comments** button on the top right of the screen.



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:



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.



Tip:

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.




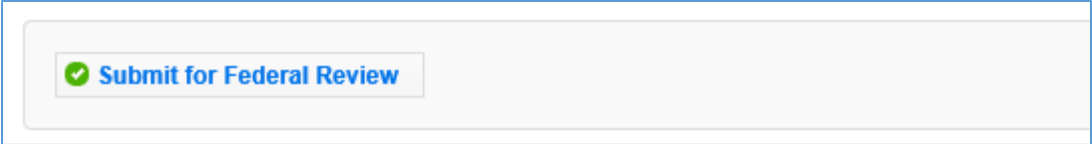
Tip:

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

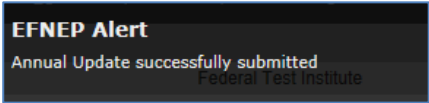
1. Select “**Manage Annual Update/5-Year Plan**” from the *WebNEERS Home Page*.
2. Click the “” icon to open your plan.
3. Click **Submit for Federal Review** at the bottom of the plan.



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).

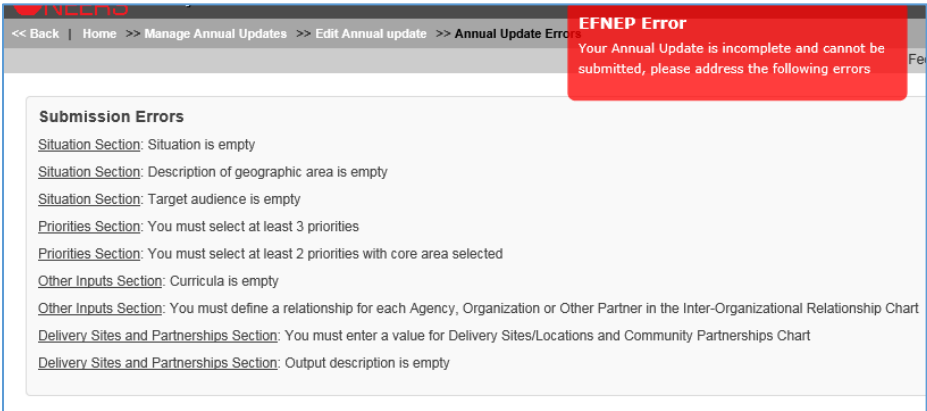
4. Click **OK** to submit the plan or **Cancel** to cancel the submission.

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.

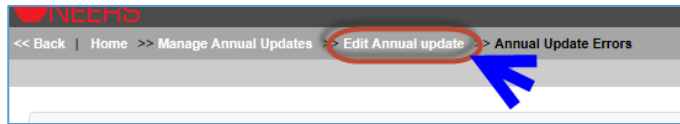


Sometimes the alert message is quick, if you don't see it, move on to step 5. If you your status is still “**Draft**”, return to step 2 and try again!



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.





- To fix submission errors, review and make note of items that need to be fixed.
- Click **“Edit Annual update”** on the breadcrumb trail to return to your plan.




- Click on the section(s) with the error(s) and make corrections.
- Scroll to the bottom and click **“Submit for Federal Review”**. If the submission fails again, complete these steps again.
- After you submit, confirm your **Status** is **“Pending”** on the **Manage Annual Update/5-Year Plan** screen.

Manage	Plan Name	Fiscal Year	Status
 	Example Program Plan	2015	Pending

- Use the  icon to preview the plan you submitted.
- 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:

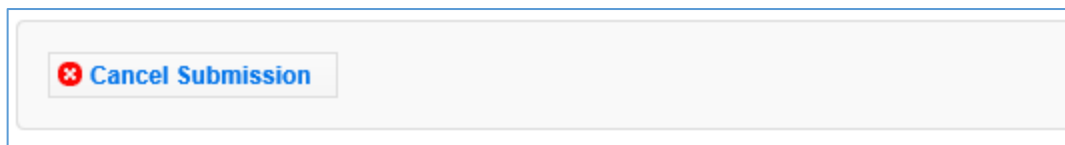
If you notice a mistake before the Federal Office begins its review, you can make edits within the plan and save them. All saved changes to a **“Pending”** plan are automatically visible to the Federal Office after you save.

Cancel Annual Update/5-Year Plan Submission

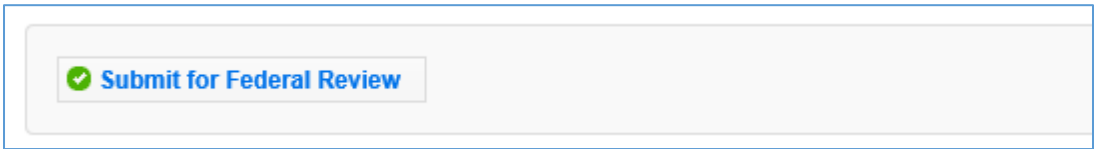
If your Annual Update/5-Year Plan has a status of **“Pending”**, you can cancel the submission.

WebNEERS Instructions

- From the **Manage Annual Update/5-Year Plan** screen, click the  icon.
- 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.

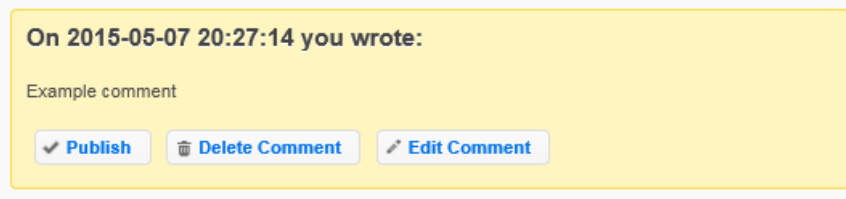
WebNEERS Instructions

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:

	<p><u>Locked Sections</u> are approved. No further action is needed.</p> <p>Tip: 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.</p>
	<p><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.</p>

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:

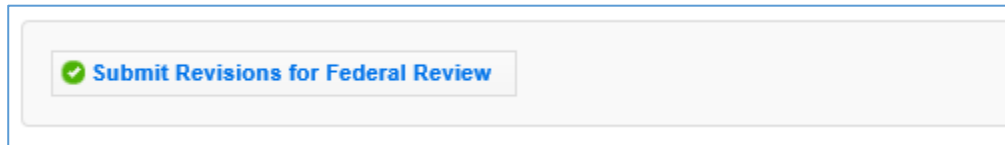


4. Click **Publish** to make the comment visible to the Federal level upon submission.
5. Click **Delete Comment** to delete the comment.
6. Click **Edit Comment** to edit the comment.



*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:

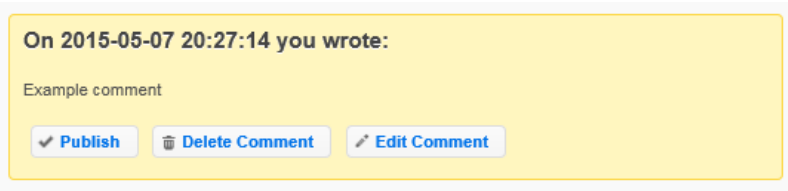
Modifying an **“Approved”** plan will create a clone of the plan; you cannot edit a plan that has been approved by the Federal Office. You are essentially creating a new one.

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 “” 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:



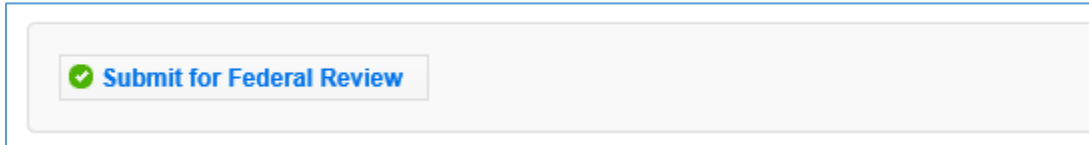
12. Click **Publish** to make the comment visible to the Federal level upon submission.
13. Click **Delete Comment** to delete the comment.
14. Click **Edit Comment** to edit the comment.



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.



Create New 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. 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.






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 Institution Level 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 Region Level 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:

Institution Level users cannot edit Region Level 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 Region Level 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 Region level 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 Institute level, 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	<input type="text" value="0"/>	<input type="text" value="0"/>
Adult Recreation Centers	<input type="text" value="0"/>	<input type="text" value="0"/>
Churches	<input type="text" value="0"/>	<input type="text" value="0"/>
Community Centers	<input type="text" value="0"/>	<input type="text" value="0"/>
Emergency Food Assistance Sites	<input type="text" value="0"/>	<input type="text" value="0"/>
Extension Offices	<input type="text" value="0"/>	<input type="text" value="0"/>
Farmers Markets	<input type="text" value="0"/>	<input type="text" value="0"/>
Food Stores	<input type="text" value="0"/>	<input type="text" value="0"/>
Head Start Sites	<input type="text" value="0"/>	<input type="text" value="0"/>
Health Care Sites	<input type="text" value="0"/>	<input type="text" value="0"/>
Libraries	<input type="text" value="0"/>	<input type="text" value="0"/>
Other Youth Education Sites	<input type="text" value="0"/>	<input type="text" value="0"/>
Public Housing	<input type="text" value="0"/>	<input type="text" value="0"/>
Schools	<input type="text" value="0"/>	<input type="text" value="0"/>
Shelters	<input type="text" value="0"/>	<input type="text" value="0"/>
SNAP Offices	<input type="text" value="0"/>	<input type="text" value="0"/>
WIC Program Sites	<input type="text" value="0"/>	<input type="text" value="0"/>
Worksites	<input type="text" value="0"/>	<input type="text" value="0"/>

[+ Add Other](#)

Manage Program Impacts


The **Manage Program Impacts** screen includes all Regional Level and Institution Level Program impacts. Regional impacts are only visible at the Institution Level if the “Submit for Institution Use” box is checked at the Regional Level (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. Institution Level users can edit Regional impacts, if needed. Those changes will be visible to the Regional Level user.

WebNEERS Instructions


1. Log in as an Institution Level user.
2. Select “**Manage Program Impacts**” from the **WebNEERS Home Page**.
3. Click **Add Program Impact** to create an Institution Level 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 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.



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 Region or Institution Level impacts or examples from your view.

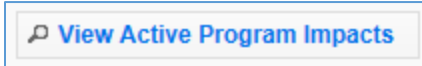


The “” icon will only be visible if the impact has not been submitted; you cannot hide an impact if it has been submitted to the Federal Office.

10. If you hide an example by mistake, click the **View Hidden Program Impacts** button.

11. Click the “” icon to unhide the impact.

12. Click the **View Active Program Impacts** button to return to the list of active 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.



*More than one **Core Area** can be selected.*

7. Indicate the **Secondary Area(s)** of the impact.



*More than one **Secondary Area** can be selected.*



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.



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

 
 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 Regional Level and Institution Level community level impacts. Regional impacts are only visible at the Institution Level if the “Submit for Institution Use” box is checked at the Regional Level (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. Institution Level users can edit Regional impacts, if needed. Those changes will be visible to the Regional Level user.

SEARCH:



WebNEERS Instructions

1. Log in as an Institution Level 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 Institution Level 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**




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.



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 or Institution Level impacts or examples from your view.
See additional notes below.



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 Region Level 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



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.



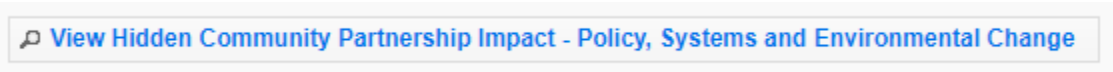
You will see either the edit or the preview icon. The edit icon will only be visible if the impact is not associated with a plan that was submitted to the Federal Office. If the impact has been submitted, the preview icon will be visible.

15. If needed, use the “” icon to hide Region Level impacts or examples from your view.



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.



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.



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 partnership 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 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.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Commit to collaborate to address identified needs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conduct needs assessment to determine the extent of concern and potential for resolution.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Form partnerships or coalitions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Medium Term Indicators

Medium Term Indicators	
Organizations and Communities commit to change.	
DIET QUALITY PHYSICAL ACTIVITY FOOD RESOURCE MANAGEMENT FOOD SAFETY FOOD SECURITY	
<input type="checkbox"/>	Partnership/Coalition adopts a written plan that contains specific objectives and action steps for diet quality.
<input type="checkbox"/>	Facilitate the use of more nutritious foods at organization and community events and programs, such as food fairs and public meetings.
<input type="checkbox"/>	Expand nutrition education opportunities through schools, community education programs, and electronic media.
<input type="checkbox"/>	Implement consistent messaging and/or local branding.
<input type="checkbox"/>	Increase nutrition education referrals across programs and agencies.
<input type="checkbox"/>	Develop access to Community Supported Agriculture shares.
<input type="checkbox"/>	Reduce disparities in policies that encourage healthy eating.
<input type="checkbox"/>	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.
<input type="button" value="➕ Add Other"/>	

DIET QUALITY	PHYSICAL ACTIVITY	FOOD RESOURCE MANAGEMENT	FOOD SAFETY	FOOD SECURITY
<input type="checkbox"/>	Partnership/Coalition adopts a written plan that contains specific objectives and action steps for physical activity.			
<input type="checkbox"/>	Expand opportunities for increased physical activity through planned organizational and community games, sports, programs, and competitions. (?)			
<input type="checkbox"/>	Organize and implement neighborhood/community walking programs, gardens, etc.			
<input type="checkbox"/>	Reduce disparities to access and use of community sports and other physical activity programs.			
<input type="checkbox"/>	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
<input type="checkbox"/>	Partnership/Coalition adopts a written plan that contains specific objectives and action steps for food resource management.			
<input type="checkbox"/>	Establish grocery stores, farmers markets, and neighborhood/community gardens in low-income neighborhoods.			
<input type="checkbox"/>	Increase food resource management education through schools, faith organizations, worksites, community centers, and other public places. (?)			
<input type="checkbox"/>	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
<input type="checkbox"/>	Partnership/Coalition adopts a written plan that contains specific objectives and action steps for food safety.			
<input type="checkbox"/>	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.			
<input type="checkbox"/>	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
<input type="checkbox"/>	Partnership/Coalition adopts a written plan that contains specific objectives and action steps for food security.			
<input type="checkbox"/>	Increase donations of food, money, or volunteer time by people in the community to emergency food programs.			
<input type="checkbox"/>	Increase quantity and quality of foods in emergency food programs.			
<input type="checkbox"/>	Increase visibility and access to non-emergency food assistance programs.			
<input type="checkbox"/>	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.			
<input type="checkbox"/>	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
<input type="checkbox"/>	Nutrient-dense foods are offered in schools, restaurants, grocery stores, farmers markets, worksites, food pantries, and other locations.			
<input type="checkbox"/>	Transportation infrastructures support access to grocery stores, farmers markets, food assistance offices, etc.			
<input type="checkbox"/>	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
<input type="checkbox"/>	A family-friendly physical activity environment exists as a result of the revitalization of existing parks, trails, playgrounds, and other means.			
<input type="checkbox"/>	Policies supporting increased physical activity at schools, worksites, and other public buildings are in place and are followed. (?)			
<input type="checkbox"/>	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
<input type="checkbox"/>	Food deserts have been reduced or eliminated.			
<input type="checkbox"/>	Nutritious and affordable foods are more readily available where food is purchased (corner stores, grocery stores, supermarkets, gas stations, etc.)			
<input type="checkbox"/>	Food preparation education is a component of school standard requirements.			
<input type="checkbox"/>	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
<input type="checkbox"/>	Food handling factors that negatively impact the safety of foods in a community (such as selling or distributing unsafe foods) have declined.			
<input type="checkbox"/>	Environmental factors that negatively affect the safety of foods in a community (such as contamination, residue, etc.) have declined.			
<input type="checkbox"/>	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.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Convene taskforces, expert committees, or advisory groups to determine the extent of concern and potential for resolution.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Commit to collaborate and communicate within and across sectors to address identified needs and determine respective roles of responsibility.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Medium Term Indicators

Medium Term Indicators	
Sector representatives influence action.	
DIET QUALITY	PHYSICAL ACTIVITY FOOD RESOURCE MANAGEMENT FOOD SAFETY FOOD SECURITY
<input type="checkbox"/>	Adopt an informed written plan that contains specific objectives and action steps for diet quality.
<input type="checkbox"/>	Establish local or statewide food policy councils to inform key decision makers and to facilitate change across sectors of influence.
<input type="checkbox"/>	Conduct social marketing campaigns that promote healthy eating environments.
<input type="checkbox"/>	Communicate the respective actions taken by sectors of influence to improve diet quality and the public's response.
<input type="checkbox"/>	Make healthier food options more available and accessible to low-income populations.
<input type="checkbox"/>	Bring affordable grocery stores, farmers markets, etc. to low-income neighborhoods.
<input type="checkbox"/>	Provide healthier food options at schools, daycares, worksites, universities, hospitals, faith organizations, social events, etc. (?)
<input type="checkbox"/>	Adapt national initiatives to state and local situations.
+ Add Other	

DIET QUALITY	PHYSICAL ACTIVITY	FOOD RESOURCE MANAGEMENT	FOOD SAFETY	FOOD SECURITY
<input type="checkbox"/>	Adopt an informed written plan that contains specific objectives and action steps for physical activity.			
<input type="checkbox"/>	Adopt statewide policies for providing physical activity education in schools and daycares.			
<input type="checkbox"/>	Conduct social marketing campaigns that promote environments that support physical activity.			
<input type="checkbox"/>	Communicate the respective actions taken by sectors of influence to improve physical activity and the public's response.			
<input type="checkbox"/>	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.			
<input type="checkbox"/>	Adapt national initiatives to state and local situations.			
+ Add Other				

DIET QUALITY	PHYSICAL ACTIVITY	FOOD RESOURCE MANAGEMENT	FOOD SAFETY	FOOD SECURITY
<input type="checkbox"/>	Adopt an informed written plan that contains specific objectives and action steps for food resource management.			
<input type="checkbox"/>	Use local or statewide food policy councils to inform key decision makers and to facilitate change across sectors of influence.			
<input type="checkbox"/>	Work together to improve food availability and food handling practices (purchasing, preparation, storage, etc.) (?)			
<input type="checkbox"/>	Develop social marketing campaigns that promote more resilient families and communities.			
<input type="checkbox"/>	Communicate the respective actions taken by sectors of influence to improve food resource management and the public's response.			
<input type="checkbox"/>	Adapt national initiatives to state and local situations.			
+ Add Other				

DIET QUALITY	PHYSICAL ACTIVITY	FOOD RESOURCE MANAGEMENT	FOOD SAFETY	FOOD SECURITY
<input type="checkbox"/>	Adopt an informed written plan that contains specific objectives and action steps for food safety.			
<input type="checkbox"/>	Facilitate safer food practices by patrons and food handlers wherever food is offered.			
<input type="checkbox"/>	Develop social marketing campaigns that promote safer food handling environments.			
<input type="checkbox"/>	Communicate the respective actions taken by sectors of influence to improve food security and the public's response.			
<input type="checkbox"/>	Reinforce safer food handling at schools, daycares, worksites, universities, hospitals, faith organizations, social events, etc.			
<input type="checkbox"/>	Develop practices and policies to ensure safe food handling in local food service and temporary food service offerings (i.e. church dinners, fairs, etc.)			
<input type="checkbox"/>	Adapt national initiatives to state and local situations.			
+ Add Other				

DIET QUALITY	PHYSICAL ACTIVITY	FOOD RESOURCE MANAGEMENT	FOOD SAFETY	FOOD SECURITY
<input type="checkbox"/>	Adopt an informed written plan that contains specific objectives and action steps for food security.			
<input type="checkbox"/>	Coordinate among emergency and non-emergency food assistance agencies and anti-hunger organizations, and with other sectors to improve program access and participation.			
<input type="checkbox"/>	Facilitate the availability of resources to efficiently and effectively support food security needs.			
<input type="checkbox"/>	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. SELECT APPROPRIATE INDICATORS – “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. RECOGNIZE WORK ISN'T DONE IN ISOLATION – 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. PARAPROFESSIONALS SHOULD FOCUS ON DIRECT EDUCATION – 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. ASSURE STAFF THAT THEIR WORK IS CRITICALLY IMPORTANT – 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, including Justification

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Add a New User to Handle Budget Requirements

The EFNEP Budget and Justification requirements are integrated into a single “Budget” process for submission 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, 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](#).

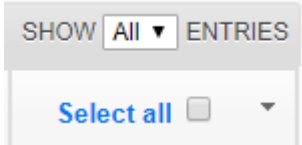
Create a New User or Add Manage Budget Permission to a Current User

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**



The verification code will need to be provided to the added 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 the user is to have and follow the instructions below

Create User with Full Permissions	Create User with Restricted Permissions
<i>User has full capabilities; can access everything in the Institute Level System.</i>	<i>User has restricted capabilities; cannot access anything except the budget section.</i>
<ol style="list-style-type: none"> 1. Scroll to the bottom 2. Click “Save” 	<ol style="list-style-type: none"> 1. On the far right of the table, click the checkbox next to “Select All” <u>twice</u> to deselect (uncheck) every option in the Permissions table. 2. Type “Budget” into the SEARCH box. This will bring up Permission #120 – Manage Budget. 

Create User with Full Permissions	Create User with Restricted Permissions				
	<p>3. Click the checkbox in the “Select All” column for permission #120 to select the permission.</p> <p>4. Delete the word “Budget” from the SEARCH box and confirm only permission #120 is selected. IF not, repeat steps 1-3.</p> <div data-bbox="802 457 1258 640" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p>SEARCH: <input type="text" value="budget"/></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 20%;">id</th> <th style="width: 80%;">Title</th> </tr> </thead> <tbody> <tr> <td>120</td> <td>Manage Budget</td> </tr> </tbody> </table> </div> <p>5. Scroll to the bottom.</p> <p>6. Click “Save”</p>	id	Title	120	Manage Budget
id	Title				
120	Manage Budget				



Create a user who has custom designed permissions (has capabilities based on the permissions selected 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 the user is to be created as an **Institute** user or “**Cancel**” if the **Regional** user type was selected 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.

Confirm Permissions

To review a user with restricted permissions and/or to confirm it was done correctly, follow these steps.



This can only be done after the user is registered for the system; confirmation of permissions cannot occur if registration is pending.

1. Select “**View Users**” from the **WebNEERS Home Page**
2. Locate the user in the table and click the “” 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) selected. If following the instructions above to create a user with restricted budget 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, including Justification

WebNEERS Instructions

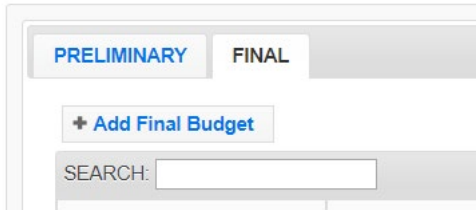
1. Log in as an Institution Level user.
2. Select **“Manage Budget”** from the **WebNEERS Home Page**.

Example home screen:

The screenshot displays the WebNEERS Home Page interface, organized into several columns of management options:

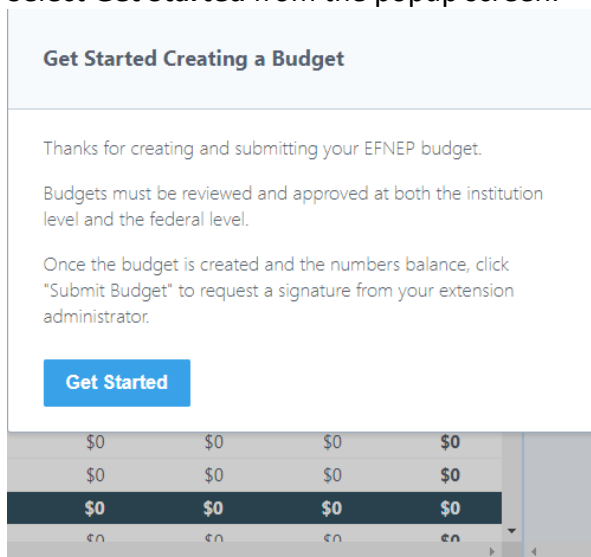
- Annual Update/5-Year Plan:** Includes links for Manage Annual Update / 5-Year Plan, Manage Program Impacts, **Manage Budget** (highlighted), Manage Delivery Sites and Partnerships, and Manage Community Partnership Impacts.
- Summary Reports:** Categorized by Adult, Youth, and Staff, with sub-options like Adult Summary, Adult Diet Summary, and Youth Questionnaire Summary.
- Browse:** Categorized by Adult, Youth, and Staff, with sub-options like Browse Adult Summary, Browse Youth Questionnaire Summary, and Browse Staff Summary.
- Questionnaires:** Categorized by Adult and Youth, with sub-options for Manage Questionnaire Sets and Manage Questions.
- Reports:** Categorized by Adult and Youth, with sub-options for Set Reports, List Reports, and Detail Reports.
- Setup:** Categorized by Adult and Youth, with sub-options for Subgroups, Filters, Public Assistance, and Food Tags.
- Users:** Includes View Users, Add User, and View Pending Users.
- Institute Regions:** Includes Manage Regions and Add Region.
- Coordinator:** Includes Manage Coordinator Data.
- Reporting Years:** Includes Manage Reporting Years, Manage Reporting Dates, and View Feedback Report.
- Tables:** Includes Table Version Info, View Foods, Daily Recommendations, Recommended Calories, USDA Food Patterns, Dietary Reference Intakes, and Poverty Guidelines Table.
- Data Management:** Includes Export Data and Migrate Data.

3. Select either the **Preliminary** or **Final** tab at the top of the screen to add the type of budget that you want to prepare. To assist you in selecting the correct tab, the system will default to the budget that you should enter.



Instructions for both types of budgets (preliminary and final) are the same. Be sure to confirm that you are entering data within the right tab. Preliminary Budget and Justification is due 1 July, in conjunction with the 5-year plan/Annual Update. Final Budget, including Justification is due 45 days after the final institution allocation amounts are published. The deadline will vary from year to year. For more information see page 24.

4. Click **Add Final Budget** (or Add Preliminary Budget) to create an Institution Level budget.
5. Select **Get Started** from the popup screen.



6. Review **Allocation** contained in the system. Indicated in the green box and in the **Allocation** line. This should match the amount listed for your institution published in Appendix A.

See screenshot below.

Screenshot of Budget Screen

University of Maryland - College Park 2019 Budget [Edit Name](#)

Type: Final Status: New Budget Role: User Contact Support

\$0 Est. 2018 Carryover [Edit](#) [?](#) \$0 Professional
 \$921,253 Allocation \$0 Paraprofessional
 +\$921,253 Total Funds Available [?](#) -\$0 Total Direct Costs \$0 Administrative

\$921,253
to be budgeted

Direct Costs ?				
	Professional	Paraprofessional	Administrative	Total
Personnel ?				
FTE		0	0	0
Salary	\$0	\$0	\$0	\$0
Fringe	\$0	\$0	\$0	\$0
Additional Expenses				
Travel ?	\$0	\$0	\$0	\$0
Equipment ?	\$0	\$0	\$0	\$0
Supplies ?	\$0	\$0	\$0	\$0
Other ?	\$0	\$0	\$0	\$0
Direct Costs ?	\$0	\$0	\$0	\$0
Projected Carryover ?	\$0	\$0	\$0	\$0
Direct Costs + Carryover ?	\$0	\$0	\$0	\$0

7. Select **Edit Name** at the top of the screen to change the name of the budget.
 - a. Select **Save Name** if the name of the budget is changed.

8. Select **Edit** to the right of the Est. {year} Carryover to report the value of the carryover to be reported.
 - a. Select **Save Carryover** when the amount has been entered.

Budget and Justification Data Entry Overview (Items 9-24)

The budget and justification have been integrated into a single data entry process. Budget amounts for each personnel type within each line under Personnel and Additional Expenses are entered into the field at the right of each line item title (FTE, salary, etc.) These figures automatically populate into the budget (black arrows in the figure, below).

The budget justification is a narrative description of how funds listed in the EFNEP budget will be used. Descriptions are entered into text boxes below each line item title. Descriptions should be brief, yet clear and complete. All expenses should support the goals, purposes, and allowable costs for EFNEP. Justification totals should equal the total amount that is entered into the field to the right of the line item title (red arrows in the figure below).

Screenshot of Personnel FTEs

Direct Costs	Professional	Paraprofessional	Administrative	Total
Personnel				
FTE	0	0	0	0
Salary	\$0	\$0	\$0	\$0
Fringe	\$0	\$0	\$0	\$0
Additional Expenses				
Travel	\$0	\$0	\$0	\$0
Equipment	\$0	\$0	\$0	\$0
Supplies	\$0	\$0	\$0	\$0
Other	\$0	\$0	\$0	\$0
Direct Costs	\$0	\$0	\$0	\$0
Projected Carryover	\$0	\$0	\$0	\$0
Direct Costs + Carryover	\$0	\$0	\$0	\$0

For each budget category, please do the following:

- Match the budget figures in the justification to those in the budget.
- In the justification, include budget figures and break down lump sums – e.g., if \$500,000 is allocated for supplies, indicate 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 expenses are shared with other programs/partners, make sure the justification includes a statement to that effect.

Personnel – FTE, Salary, & Fringe

Narrative should include description of the staff types as well as budget figures for the number of staff and the breakdown of Full Time Equivalents (FTEs), salaries, and fringe benefits. Do not include names or other Personally Identifiable Information.

9. Select **FTE** row located under the **Personnel** heading. *Screen shot located on top of page 8.*
 - a. Enter the **FTEs** of **Professional** time, to the nearest 100th, in the field to the right of the **Professional** title. If a higher precision value is entered, WebNEERS will round to the hundredths place.
 - b. Enter the description and justification for **Professional** staff. The section must contain:
 - i. The position title and number of staff holding the identified position title.
Example: Professor (1 staff); Extension Support Specialist (3 staff); Finance Manager (1 staff) etc.
 - ii. The mean salary and salary range for the positions reflected.
Example: The means salary is \$70,000 (\$35,000 - \$147,000 range).
 - iii. The job duties of the positions reflected.
Example: Professionals train, supervise, and support peer educators (paraprofessionals); coordinate efforts and collaborate with community partners to improve the food and physical activity environment for participants and inform key decision-makers and stakeholders of changes that can positively impact the lives of the limited-resource

population; provide overall program oversight, fiscal management, quality assurance, and evaluation efforts

- iv. Define why the positions reflected are important to EFNEP.

Example: Without professional staff EFNEP in the State would not be functional.

- c. Enter the **FTEs of Paraprofessional** time, to the nearest 100th, in the field to the right of the **Paraprofessional** title.
- d. Enter the description and justification for **Paraprofessional** staff. The section must contain:
 - i. The position title and number of staff holding the identified position title.
Example: Community Nutrition Educator (30 staff).
 - ii. The description defining the positions reflected.
Example: The positions are non-salaried.
 - iii. The job duties of the positions reflected.
Example: Paraprofessionals staff teach program participants how to improve their nutritional health and well-being; deliver educational content to program participants; collect program evaluation and reporting data; document lessons content and outcome; participate in professional development opportunities for program staff through in-service education and other means, as appropriate, within the program context.
- e. Enter the **FTEs of Administrative Staff** time, to the nearest 100th, in the field to the right of the **Administrative Staff** title.
- f. Enter the description and justification for **Administrative** staff. The section must contain:
 - i. The position title and number of staff holding the identified position title.
Example: Administrative Assistant (1 staff), Data Clerk (3 staff).
 - ii. The description defining the positions reflected.
Example: The positions are non-salaried.
 - iii. The job duties of the positions reflected.
Example: Administrative Assistant/Data Clerk Staff conduct the duties necessary to support the tasks of the paraprofessional staff: enter program evaluation data into WebNEERS; generate program participant diagnostic reports; review and correct program evaluation data in WebNEERS to ensure quality; 100% of their time is in support of the Paraprofessional staff employed through EFNEP.
 - iv. Define why the positions reflected are important to EFNEP.
Example: The services provided by these staff ensure paraprofessional staff are available to meet the needs of low-income participants.

10. Select **Update** to save the information or **Cancel** to discard the information entered.



Do not select another category to the left without selecting Update, or all of the information typed will be lost. The user will receive an error message warning them of the loss and the user must select

Ok before the category will be changed.

The screenshot shows a form with three main sections: Professional, Paraprofessional, and Administrative. Each section has a title, a numeric input field (all set to 0), a rich text editor with formatting options (B, I, U, link, list, indent, Normal, undo), and a text area with 'Insert text here ...' placeholder. At the bottom are 'Update' and 'Cancel' buttons.

11. Select **Salary** row located under the **Personnel** heading. *Screen shot located on page 9.*

a. Enter the **Salary of Professional** time, to the nearest cent, in the field to the right of the **Professional** title.

b. Enter the description and justification for **Professional** staff.

Example: In order to implement EFNEP throughout XX counties of State, <dollar value entered in step 10a> is budgeted for <Insert FTEs entered for Professionals 8a> FTE professional salaries (representing XX staff). See Professional FTE description for responsibilities.



Make sure the totals reported in the detail section matches the total FTEs and dollar amounts listed across categories (FTE, salaries, and fringe) on the budget page (see screen shot located on page 5). Failure to do so will result in rejection of the budget.

c. Enter the **Salary of Paraprofessional** time, to the nearest cent, in the field to the right of the **Paraprofessional** title.

d. Enter the description and justification for **Paraprofessional** staff.

Example: In order to implement EFNEP throughout XX counties of State, <dollar value entered in step 10c> is budgeted for <Insert FTEs entered for Paraprofessionals 8c> FTE paraprofessional salaries (representing XX staff). See Paraprofessional FTE description for responsibilities.



Make sure the totals reported in the detail section matches the total FTEs and dollar amounts listed across categories (FTE, salaries, and fringe) on the budget page (see screen shot located on page 5). Failure to do so will result in rejection of the budget.

- e. Enter the **Salary of Administrative Staff** time, to the nearest cent, in the field to the right of the **Administrative Staff** title.
- f. Enter the description and justification for **Administrative** staff.
Example: In order to implement EFNEP throughout XX counties of State, <dollar value entered in step 10e> is budgeted for <Insert FTEs entered for Administrative Staff 8e> FTE Administrative Staff salaries (representing XX staff). See Administrative Staff FTE description for responsibilities.



Make sure the totals reported in the detail section matches the total FTEs and dollar amounts listed across categories (FTE, salaries, and fringe) on the budget page (see screen shot located on page 5). Failure to do so will result in rejection of the budget.

12. Select **Update** to save the information or **Cancel** to discard the information entered.

The screenshot shows a form titled "Salary" with a total of "\$0". It contains three rows for different staff categories: Professional, Paraprofessional, and Administrative. Each row has a corresponding salary input field, all currently set to "\$0.00". Below each input field is a rich text editor with a toolbar containing icons for Bold (B), Italic (I), Underline (U), Link, Bulleted List, Numbered List, Indent, and Outdent, along with a "Normal" style selector and a "Link" icon. The text area of each editor contains the placeholder "Insert text here ...". At the bottom of the form are two buttons: "Update" and "Cancel".

13. Select **Fringe** row located under the **Personnel** heading. Screen shot located on top of page 11.

- a. Enter the **Fringe of Professional** time, to the nearest cent, in the field to the right of the **Professional** title. If EFNEP dollars are not used to pay fringe, enter "0", and note that other funds are used in the description section.
- b. Enter the description and justification for **Professional** staff. This section should include:
 - i. The approved fringe rate.
Example: The approved fringe rate in the State is XX.XX%.
 - ii. The dollar value and formula on which it was calculated.
*Example: The fringe benefit cost is \$34,000.00 (Professional Salary dollars * fringe rate).*
 - iii. The number of professional staff to which the rate applies.
Example: The fringe benefits are paid for XX professional staff.



Make sure the totals reported in the detail section matches the total FTEs and dollar amounts listed across categories (FTE, salaries, and fringe) on the budget page (see screen shot located on page 5). Failure to do so will result in rejection of the budget.

- c. Enter the **Fringe of Paraprofessional** time, to the nearest cent, in the field to the right of the **Paraprofessional** title.
- d. Enter the description and justification for **Paraprofessional** staff. This section should include:
 - i. The approved fringe rate.
Example: The approved fringe rate in the State is XX.XX%.
 - ii. The dollar value and formula on which it was calculated.
*Example: The fringe benefit cost is \$34,000.00 (Paraprofessional Salary dollars * fringe rate).*
 - iii. The number of paraprofessional staff to which the rate applies.
Example: The fringe benefits are paid for XX paraprofessional staff.



Make sure the totals reported in the detail section matches the total FTEs and dollar amounts listed across categories (FTE, salaries, and fringe) on the budget page (see screen shot located on page 5). Failure to do so will result in rejection of the budget.

- e. Enter the **Fringe of Administrative Staff** time, to the nearest cent, in the field to the right of the **Administrative Staff** title.
- f. Enter the description and justification for **Administrative** staff. This section should include:
 - i. The approved fringe rate.
Example: The approved fringe rate in the State is XX.XX%.

- ii. The dollar value and formula on which it was calculated.
*Example: The fringe benefit cost is \$34,000.00 (Administrative Staff Salary dollars * fringe rate).*
- iii. The number of administrative staff to which the rate applies.
Example: The fringe benefits are paid for XX administrative staff.



Make sure the totals reported in the detail section matches the total FTEs and dollar amounts listed across categories (FTE, salaries, and fringe) on the budget page (see screen shot located on page 5). Failure to do so will result in rejection of the budget.

14. Select **Update** to save the information or **Cancel** to discard the information entered.

The screenshot shows a web-based form for entering fringe benefit information. The form is titled "Fringe" and has a total value of "\$0" displayed in the top right corner. It is organized into three main sections: "Professional", "Paraprofessional", and "Administrative". Each section contains a text input field with a value of "\$0.00" and a rich text editor toolbar with options for bold, italic, underline, link, list, and text color. Below the sections, there are two buttons: "Update" and "Cancel".

Additional Expenses - Travel

Narrative should include budget figures for funds used for local and out of state/territory travel for conferences/trainings. Be specific in terms of how much funding is designated for various items. 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., presenting on EFNEP, session(s) focus on EFNEP related topics, etc.) 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.

1. Select **Travel** row located under the **Additional Expenses** heading. *Screen shot located on page 13.*
 - a. Enter the **Travel** of **Professional** time, to the nearest cent, in the field to the right of the **Professional** title.
 - b. Enter the description and justification for **Professional** staff travel. The section must contain:
 - i. The total transportation costs, with a breakdown between in state and out of state.
Example: Professional Transportation; \$dollars in state; \$dollars out of state.
 - ii. Description of In-State Transportation Costs and Justification for the expenses.
Example: In state Transportation is: ---<dollar value> - in state mileage - approximately # miles @ \$rate/mile. These costs are incurred while conducting quality control and supervisory visits to paraprofessional staff located at various sites across New York State. <dollars> - Overnight hotel in state conferences/meetings
 - iii. Description of Out of State Transportation Costs and Justification for the expenses.
Important: *Be sure to identify the costs associated with attending the EFNEP National Meeting.*



Example: -\$dollars transportation - airline tickets and/or other transportation related expenses to attend out of state conferences/meetings including at least two staff attending the EFNEP Annual Meeting and three staff attending the Society of Nutrition Education and Behavior conference. \$dollars – out of state hotels. This includes at least two staff attending the EFNEP National Meeting (\$dollar value) and at least three staff attending SNEB (\$dollar value). ---\$dollars– Conference registration fees. This includes two staff attending the EFNEP National Meeting [\$dollar value – conference registration], and three staff attending the Society of Nutrition Education and Behavior conference \$dollar value registration.

Per diem for ‘meals and food’ are acceptable, allowable costs. However, it is critical that only the terms ‘per diem’ is included if per diem costs will be charged to EFNEP.

- c. Enter the **Travel** of **Paraprofessional** time, to the nearest cent, in the field to the right of the **Paraprofessional** title.
- d. Enter the description and justification for **Paraprofessional** staff travel. The section must contain:
 - i. Justification and purpose of Paraprofessional travel.
Example: Travel funds support mileage costs for staff to and from teaching sites (home visits, group classes), mileage and lodging associated with staff development training and in-service, and national, regional and state meetings/conferences. Travel to and from locations at which education is delivered is required for the successful operations of EFNEP within the State.
 - ii. Number of staff and FTEs who are covered by the travel costs.

Example: Paraprofessional travel accounts for the remaining \$dollar value (Percent of travel costs devoted to paraprofessionals %). There are XX FTEs representing XX staff members who deliver education across State.

iii. Breakdown of the transportation costs.

Example: overnight accommodations/room rental for the State meeting/update/training/conference for the XX paraprofessional staff (\$dollar value); transportation to and from the State meeting/update/training/conference (\$dollar value -- representing # miles @\$rate/mile); transportation to and from program delivery - \$dollar value -- representing # miles @\$rate/mile; the average miles per participant reached and/or any other justification that equates the cost to the lessons delivered and/or participants reached.



Per diem for 'meals and food' are acceptable, allowable costs. However, it is critical that only the terms 'per diem' is included, if per diem costs will be charged to EFNEP.

e. Enter the **Travel of Administrative Staff** time, to the nearest cent, in the field to the right of the **Administrative Staff** title.

f. Enter the description and justification for **Administrative** staff travel. The section must contain:

i. Justification and purpose of Administrative Staff travel.

Example: Travel funds support mileage costs for administrative staff to and from X and purposes.

ii. Number of staff and FTEs who are covered by the travel costs.

Example: Administrative staff travel accounts for the remaining \$dollar value (Percent of travel costs devoted to administrative staff %). There are XX FTEs representing XX staff members who deliver education across State.

iii. Breakdown of the transportation costs.

Example: overnight accommodations/room rental for the State meeting/update/training/conference for the XX administrative staff (\$dollar value); transportation to and from the State meeting/update/training/conference (\$dollar value -- representing # miles @\$rate/mile).

2. Select **Update** to save the information or **Cancel** to discard the information entered.

Screenshot below.

Screenshot of travel justification

The screenshot displays a web-based form for travel justification. It is organized into three main sections: Professional, Paraprofessional, and Administrative. Each section includes a title, a monetary input field (currently showing \$0.00), a rich text editor with standard formatting tools (bold, italic, underline, link, bulleted list, numbered list, indent, outdent, normal), and a text area with a placeholder 'Insert text here ...'. At the bottom of the form are two buttons: 'Update' and 'Cancel'.

Additional Expenses - Equipment

Equipment costs are uncommon - ***only single items costing over \$5000 should be included under equipment.*** Narrative should include the budget figure for each piece of equipment that will be purchased. Be specific in terms of why this item is needed and whether it will be used solely for EFNEP or prorated.

1. Select **Equipment** row located under the **Additional Expenses** heading. *Screen shot located on page 15.*



Important: Only equipment costing \$5,000 or more per item should be recorded within the Equipment section. Items under \$5,000, may be applicable in the **Supplies** section.

- a. Enter the **Equipment** of **Professional** time, to the nearest cent, in the field to the right of the **Professional** title.
- b. Enter the description and justification for **Professional** staff Equipment. The section must contain:
 - i. The total costs of the equipment.
Example: The car will cost \$5,001.

- ii. Description the purpose for the purchase.
Example: A 2000 Chevrolet Silverado 1500.
 - iii. Provide justification, including why it is important to EFNEP.
Example: The Silverado is being purchased to transport the supplies of EFNEP between the State office and county programs. The car is only being used by EFNEP.
- c. Enter the **Equipment** of **Paraprofessional** time, to the nearest cent, in the field to the right of the **Paraprofessional** title.
- d. Enter the description and justification for **Paraprofessional** staff Equipment. The section must contain:
- i. The total costs of the equipment.
Example: The car will cost \$5,001.
 - ii. Description the purpose for the purchase.
Example: A 2000 Chevrolet Silverado 1500.
 - iii. Provide justification, including why it is important to EFNEP.
Example: The 4-wheel drive Silverado is used by 3 county staff to reach an indigenous peoples for lesson delivery. The 4-wheel drive is needed to successfully reach the location and transport all related teaching materials.
- e. Enter the **Equipment** of **Administrative Staff** time, to the nearest cent, in the field to the right of the **Administrative Staff** title.
- f. Enter the description and justification for **Administrative** staff Equipment. The section must contain:
- i. The total costs of the equipment.
 - ii. Description the purpose for the purchase.
 - iii. Provide justification, including why it is important to EFNEP.

Screenshot of Equipment below.

2. Select **Update** to save the information or **Cancel** to discard the information entered.

The screenshot shows a form titled "Equipment" with a total of "\$0". It is divided into three sections: "Professional", "Paraprofessional", and "Administrative". Each section contains a text input field with a rich text editor toolbar (including Bold, Italic, Underline, Link, List, Indent, and Normal) and a numeric input field for a dollar amount, all currently set to "\$0.00". At the bottom of the form are two buttons: "Update" and "Cancel".

Additional Expenses - Supplies

Narrative should include budget figures for supplies. This category includes office supplies; copying and printing; software; computers and other devices; food demonstration supplies; tools to reinforce concepts; and general operation materials. Include the institution’s guidance for replacing computers and other devices. 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 preparation, etc.*).

1. Select **Supplies** row located under the **Additional Expenses** heading. *Screen shot located on page 17.*
 - a. Enter the **Supplies** of **Professional** time, to the nearest cent, in the field to the right of the **Professional** title.
 - b. Enter the description and justification for **Professional** staff Supplies. The section must contain:
 - i. The total costs of the Supplies.
 - ii. Description and justification for the costs.
 - iii. Provide justification, including why it is important to EFNEP.
Example: \$dollars - Communications; Communication includes telephone and internet charges, directly associated with performing the duties of EFNEP program management and recruitment; \$dollars - Office expenses (postage, printing, copying, software); These expenses include recipe analysis software, training teaching materials, communications, and printing or purchase of educational materials.

- c. Enter the **Supplies of Paraprofessional** time, to the nearest cent, in the field to the right of the **Paraprofessional** title.
- d. Enter the description and justification for **Paraprofessional** staff Supplies. The section must contain:
- i. The total costs of the Supplies.
 - ii. Description and justification for the costs.
Example: \$dollars – for food preparation and tastings (\$X/participant per lesson) \$dollars - Communications - [\$X/staff member]; \$X - materials and supplies for lesson delivery (travel rolling carts, sturdy bags, locks, measuring cups, measuring spoons, hot plates, cutting boards, markers, pens, paper, Post-it notes, flip chart paper, printing/publications, copies, postage etc.); Teaching supplies [travel rolling carts ~\$X/cart, sturdy bags ~ \$X/bag, locks to maintain confidentiality when transporting participant records ~\$X/bag, measuring cups, measuring spoons, hot plates, cutting boards, teaching supplies – uniform, markers, pens, paper, Post-it(r) notes, flip chart paper, etc.] - \$X per paraprofessional staff member to outfit teach kits for use with and by program participants educated in a hands-on dialogue approach to learning, where each participant has their own materials for use during the education; Printing and Publication materials [copying, printing, printed materials] - \$X/participant reached - adults and youth; Postage [\$dollars] - is \$X per paraprofessional staff to send letters and/or follow up materials to program participants and partner agencies.*
- *Exception for EFNEP, since paraprofessional staff work with vulnerable, at-risk populations, recognizable clothing, such as program identifying T-shirts are considered a uniform to serve as identification of trusted staff, and therefore allowable.*
- e. Enter the **Supplies of Administrative Staff** time, to the nearest cent, in the field to the right of the **Administrative Staff** title.
- f. Enter the description and justification for **Administrative** staff Supplies. The section must contain:
- i. The total costs of the Supplies.
 - ii. Describe the purpose for the purchase.
Example: \$dollars – Communications. Communication includes telephone and internet charges, directly associated with performing the duties of the Administrative Assistant/Data Entry Clerk who perform EFNEP data entry.

Screenshot of Supplies below.

2. Select **Update** to save the information or **Cancel** to discard the information entered.

The screenshot shows a budgeting interface with a blue header bar labeled 'Supplies' and a total value of '\$0'. Below the header are three rows, each with a category name, a text input field with a rich text editor toolbar, and a monetary value field set to '\$0.00'. The categories are 'Professional', 'Paraprofessional', and 'Administrative'. At the bottom of the interface are two buttons: 'Update' and 'Cancel'.

Additional Expenses - Other

Other expenses include rent. Descriptions should be specific in terms of how much funding is designated for various items/costs, and why such costs are necessary.

1. Select **Other** row located under the **Additional Expenses** heading. *Screen shot located on page 18.*



Important: *Rental costs, office and/or program delivery rental costs are reported under Other.*

- a. Enter **Other Professional** time, to the nearest cent, in the field to the right of the **Professional** title.
- b. Enter the description and justification for **Professional** staff Other. The section must contain:
 - i. The total costs of Other.
 - ii. Description and justification for the costs. *If this cost is shared, indicate that only the pro-rated amount is included in the budget and how that pro-rated amount has been determined.*
 - iii. Provide justification, including why it is important to EFNEP. Include enough detail to justify large expenses. If your institution has more than one rental agreement providing the rate for each agreement or the rate range of all agreements are acceptable. *Example: \$dollars/month – office space rental for X staff. Office space is required for the successful delivery of EFNEP in State.*


- c. Enter **Other Paraprofessional** time, to the nearest cent, in the field to the right of the **Paraprofessional** title.
 - d. Enter the description and justification for **Paraprofessional** staff Other. The section must contain:
 - i. The total costs of Other.
 - ii. Description and justification for the costs.
Example: \$dollars – office space rental for X staff. Office space is required for the successful delivery of EFNEP in State. \$dollars – facilities rental for # of series/groups. # facilities charge a room rental fee to cover costs of building maintenance and upkeep. These facilities result in X groups and Y participants enrolled each year.
 - e. Enter **Other of Administrative Staff** time, to the nearest cent, in the field to the right of the **Administrative Staff** title.
 - f. Enter the description and justification for **Administrative** staff Other. The section must contain:
 - i. The total costs of Other.
 - ii. Description the purpose for the purchase.
Example: \$dollars – office space rental for X staff. Office space is required for the successful delivery of EFNEP in State.
2. Select **Update** to save the information or **Cancel** to discard the information entered.

The screenshot shows a form titled "Other" with a total amount of "\$0". It is divided into three sections: "Professional", "Paraprofessional", and "Administrative". Each section has a corresponding amount field, all currently set to "\$0.00". Below each section is a rich text editor with a toolbar containing icons for Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Indent Left, Indent Right, and a link icon (I_x). The text area for each section contains the placeholder "Insert text here ...". At the bottom of the form are two buttons: "Update" and "Cancel".

Projected Carryover


Carryover funds should be factored into the overall budget sheet and sufficiently explained in the narrative. **Previous year(s) funding should be used FIRST – before spending the current allocation.** Once all program costs are accounted for in the projected fiscal year budget, the remaining amount represents the projected (i.e., remaining) carryover. That number is the difference between the total amount of funds available and all other costs.

Projected carryover amounts are needed for each of the professional, paraprofessional, and administrative staff lines. The ratio of fifty-one (51%) or more allocated to paraprofessionals and their support must be maintained for the projected carryover and for the total allocation.



Note:


The level of detail that is needed to justify carryover costs depends on the percent of carryover anticipated beyond the projected expenses for the year. The budget sheet has been formatted with prompts to guide what level of justification is needed, based on the total carryover figure listed.



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.

1. Select **Projected Carryover**. Screen shot located on top of page 20.



Note:

Important:

- If less than 100% of the Allocation is projected in Carryover, identify what the carryover amount is and insert the following sentence. *Example: \$dollar value (%) will be held by the program to ensure continued program delivery in the event that there is a delay in receiving federal funding.*
- If between 101% and 150% of the Allocation is projected in Carryover, provide a spend-down plan, with how the funds will be spent, dollar amounts, and in which year(s) they will be spent. Examples could include the number of additional staff that will be hired, additional travel costs to new sites, and/or additional program expenses. At least fifty-one (51%) of remaining carryover funds must be used to support

paraprofessionals. Sufficient detail will be needed to show how the plan increases program capacity, conducts appropriate short- term activities, and/or develops new strategies and resources using these funds

- If more than 150% of the Allocation is projected in Carryover, a detailed spend-down plan must be submitted in the “projected carryover” section. This plan must be approved by the National Program Leader before budget approval can be considered. The plan needs to explain why funds are being carried over, how long they will be carried over, and how and when they will be spent down in subsequent years, for each year with remaining allocations. The National EFNEP Office can work with Universities outside of WebNEERS to assure approval of the spend-down plan prior to approving the budget in WebNEERS. Contact NIFA for further Guidance.

2. Select **Update** to save the information or **Cancel** to discard the information entered.

Projected Carryover
\$0

This budget's carryover ratio is **0%**. As a result, justifications need to be only a few sentences.

Carryover Justification

B I U 🔗 ☰ ☰ ☰ ☰ Normal ↕ ⓧ

Insert text here ...

Professional	\$0.00
Paraprofessional	\$0.00
Administrative	\$0.00

Update

Cancel

3. Verify the dollar value in the green box is zero.

University of Maryland - College Park 2019 Budget [Edit Name](#)

Type: Final Status: Draft Role: User Contact Support Print PDF

\$0	Est. 2018 Carryover Edit ?	\$250,000 Professional	<div style="background-color: #28a745; color: white; padding: 10px; border-radius: 15px; display: inline-block;"> \$0 to be budgeted </div>
\$921,253	Allocation	\$631,253 Paraprofessional	
		\$40,000 Administrative	
+\$921,253 Total Funds Available ?		-\$921,253 Total Direct Costs	

Other Sources of Funding

Examples of other sources of funding could include university, county, or other public or private funds to pay fringe benefits for staff, support a local unit, conduct a pilot, provide food for classes, and purchase curricula. Such funds stretch the use of EFNEP resources. Indirect costs, which are costs incurred for common or joint purpose benefitting more than one cost objective, should not be included here.

1. If non-EFNEP funds will also be used to support of the program, click the “add new” box for each other source of funds. Then, in the box to the right, list the amount, source of funding, and a narrative description of what the support will provide. Contributions to specific categories can also be noted.

Other Sources of Funding [Add New](#) ?
There are no other funding sources.

\$0

Funding Source Title

Justification

B *I* U Normal *Z*

Insert text here ...

Each line item is provided for your convenience. A value is not required for each row.

Salary	<input type="text" value="\$0.00"/>
Fringe	<input type="text" value="\$0.00"/>
Travel	<input type="text" value="\$0.00"/>
Equipment	<input type="text" value="\$0.00"/>
Supplies	<input type="text" value="\$0.00"/>
Other	<input type="text" value="\$0.00"/>

[Save](#) [Cancel](#)

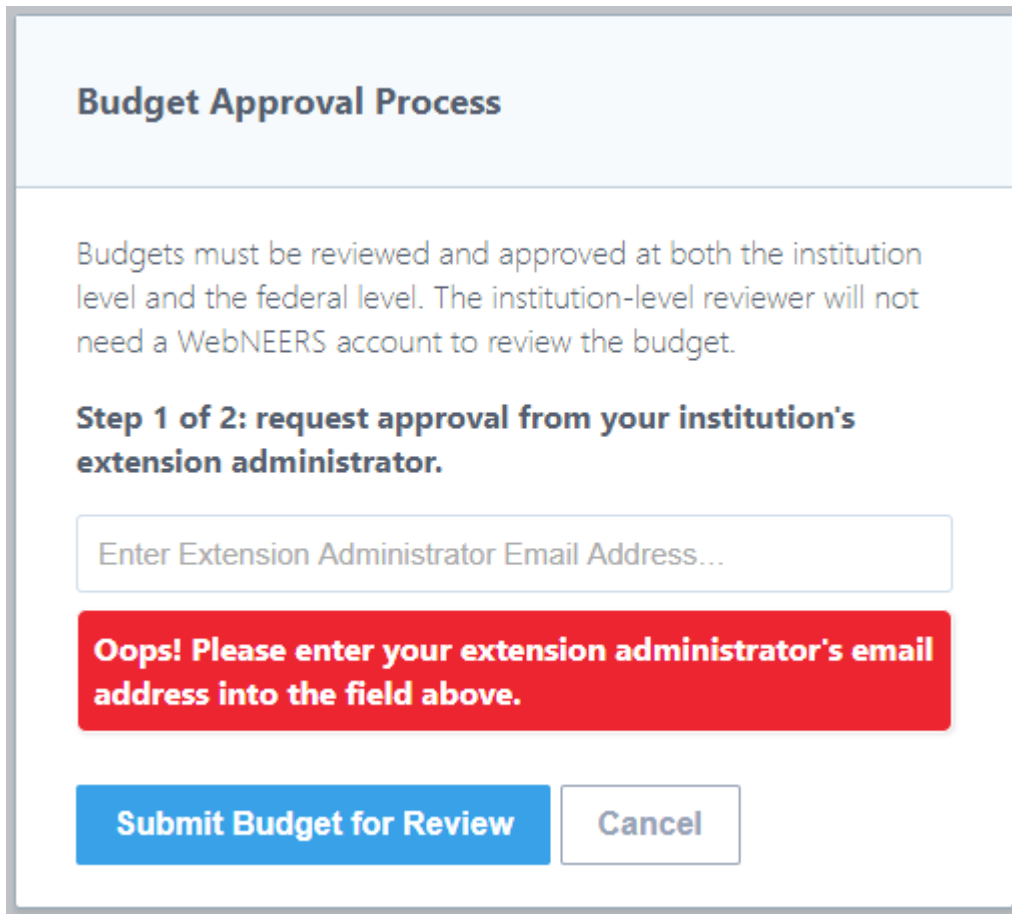
2. Select **Save Draft** or **Submit Budget**.

[Save Draft](#) [Submit Budget](#)

Submit Budget and Justification for Approval

Submission from Manage Budget

1. The budget can be submitted either directly, or as a saved draft. If submitting directly, select “**Submit Budget**” in the upper right hand corner of the screen. See screenshot for item 26, above.
2. Enter the Institute’s Extension Administrator email address, which requests the administrator’s approval of the submitted budget and justification.



Budget Approval Process

Budgets must be reviewed and approved at both the institution level and the federal level. The institution-level reviewer will not need a WebNEERS account to review the budget.

Step 1 of 2: request approval from your institution's extension administrator.


Enter Extension Administrator Email Address...

Oops! Please enter your extension administrator's email address into the field above.

Submit Budget for Review **Cancel**

3. Select **Submit Budget for Review** or **Cancel** to cancel submission.

Submission from a Saved Draft

1. If budget has been saved as a draft, review, make final corrections, and then submit. Select “**Manage Budget**” from the **WebNEERS Home Page**.
2. Select the  icon to the left of the Budget to be submitted.
3. Select “**Submit Budget**” in the upper right-hand corner of the screen.
4. Enter the Institute’s Extension Administrator email address, which requests the administrator’s approval of the submitted budget and justification.
5. Select **Submit Budget for Review** or **Cancel** to cancel submission.

Understand 'Submission Status'

After submitting the Budget and Justification to the Federal Office, the status will be marked as one of the following:

- **Extension Review:** This status indicates that information has been submitted to the Extension Administrator for review. While submission is “Extension Review,” it has not been submitted to the Federal Office.
- **Federal Review:** This status indicates that the Federal Office has received the budget submission.
- **Needs Revision:** This status indicates that the Federal Office has reviewed the submission and discovered one or more issues. To learn what they are, click on the “📧” icon and review the Federal comments. Address the issue(s) noted in the comments and resubmit (see below for [resubmission instructions](#))
- **Approved:** This status indicates that the Federal Office has reviewed the files and approved the Budget and Justification. No further action is needed.

Resubmit Budget and Justification

If the final submission “Needs Revision”, the preparer will need to review the comments from the Federal Office, revise the Budget and Justification based on those comments, and create/submit a new Final Submission.

- **Revise Budget:**

Edit the Budget information, based on the feedback provided in the orange note boxes.

The screenshot shows a budget management interface. On the left is a sidebar with categories: Personnel (highlighted with a red arrow), FTE, Salary, Fringe, Additional Expenses (Travel, Equipment, Supplies, Other), Direct Costs, and Projected Carryover. On the right is a modal window titled '+ Comments - Personnel' containing two feedback messages from Jordan Carter, FEDERAL ADMIN, dated 24 JUL. The first comment says 'Great job describing the duties of all three levels of staff in the FTE section.' The second comment says 'Salary- Please provide additional justification for Professional, Paraprofessional, and Clerical salaries (i.e. what is the salary per FTE in each category?)'

- **Revise Justification:**

Edit the Budget Justification information, based on the feedback provided in the notes.

- **Resubmit:** Follow the steps in the “Submit Budget and Justification for Approval” section above.

Deadlines

The Budget and Justification are due annually on the following schedule.

- **Preliminary Budget and Justification:** Due 1 July, in conjunction with the 5-year plan/Annual Update. The final allocation for the current fiscal year will be used. The estimated allocation figure will be prepopulated into WebNEERS prior to the budget submission period.
- **Final Budget, including Justification:** Due 45 days after the final institution allocation amounts are published. 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 for the fiscal year. The actual allocation figure will be prepopulated into WebNEERS prior to the budget submission period.

Appendix A: Budget Justification Descriptions

Personnel

Provide the full time equivalent of each staff type and their program responsibilities on the Full Time Equivalent (FTE) line.

Provide the total salary or wages for each staff type on the salary line.

Provide the total fringe benefits for each staff type and how benefits are calculated on the fringe line.

If any of these costs are covered by other funding sources, indicate "\$0" and note in the justification line. Include these costs and funding source in "Other Sources of Funding" section below.

Travel

Includes travel funds for the coordinator to the annual EFNEP National Conference and regional meetings, as well as for other staff to attend, as appropriate. Provide the programmatic reason for travel, explain large amounts, and include the miles traveled and mileage reimbursement rate as applicable.

Equipment

Equipment is defined as a single item that costs > \$5,000.

Supplies

Provide the supply costs by each staff type. Supplies include office supplies, copying and printing, software, computers and other devices, food demonstration supplies and equipment, curricula, educational supplies, tools to reinforce concepts, and general operations. Take care to explain these expenses and provide sufficient detail in justifying large expenses. Include the institution's guidance for replacing computers and other devices.

Other Expenses

Other expenses include rent. Take care to explain these expenses and provide sufficient detail in justifying large expenses. Other expenses should be entered by staff type.

Projected Carryover

Projected carryover or intentional carryover is for dollars that will remain beyond what is planned to be spent this fiscal year. Follow the instructions found at the top of the justification section for the level of justification needed based on the percent of allocation being carried forward.

Appendix B: Checks to Avoid Common Mistakes



Note icons and **examples in italics** have been used throughout this section to reduce common errors encountered during the federal review. Following is a **brief checklist** to further assist in avoiding such errors. Please confirm that all corrections have been made prior to budget submission.

- ✓ Is there a justification in each justification box?
- ✓ Do the sums of the numbers included in each of the text boxes equal the corresponding numbers in the upper right corner for each budget category?
- ✓ Have names and all other personally identifiable information been excluded?
- ✓ Has sufficient justification been given for any large or unusual expenses, (e.g., per staff, per FTE or per participant)?
- ✓ Has funding been included for the EFNEP Coordinators or his/her designee to attend the National EFNEP Conference?
- ✓ Have equipment costs been reported correctly:
 - a. Only items costing \$5000 or more should be listed under “Equipment”
 - b. Funds used for local and out of state/territory travel for conferences/trainings; travel funds for the Coordinator or his/her designee to travel to the National EFNEP Conference is included; and only the term ‘per diem’ is included if per diem costs will be charged to EFNEP under “Travel”
 - c. Office supplies; copying and printing; software; computers and other devices; food demonstration supplies; tools to reinforce concepts; and general operation materials. Include the institution’s guidance for replacing computers and other devices. should be listed under “Supplies”
 - d. All other items should be listed under “Other”
- ✓ Have unallowable expenses been avoided?
 - a. Marketing materials, in general, are not considered allowable; educational material used to introduce potential participants and partners to the program are allowable
 - b. Furniture is an unallowable expense
 - c. See NIFA’s Federal Assistance Policy Guide for further clarification what is allowable or not at <https://nifa.usda.gov/resource/nifa-federal-assistance-policy-guide-2018>
- ✓ Have all items that are shared, been prorated to reflect only the amount to which they will be used in support of EFNEP?
- ✓ Has the spend-down of carryover been adequately explained?