How to Add a New Family and Adult Member – County

The sample below is from a state that uses Volunteer Screening (state approval required) and does not have enrollment billing. Screen shots and exact instructions may vary based on State Admin settings.

1) Log in to the County account.
2) To add an adult volunteer to an existing family account, log in to the family account and continue from step 13.
3) Click on the “Enrollment” tab.
4) Click “Add Family.”

5) Enter the Family Information.
6) The Family Email and Family Phone are not required, but are highly recommended.
7) Click “Add Family.”

8) Verify this is not a duplicate family account. Check “Confirm Add New Family”
9) Click “Add Family.”

10) Enter the Profile Information.
11) Click “Continue.”
12) Select the type of member to add.  
**Adult:** Adult Volunteer  
**Contact:** Any other adult who may be affiliated with 4-H but is NOT a volunteer and should not count on the ES237 (examples: committee/board members, sponsors, judges).

13) Click “Add Member.”

14) Enter the member’s Personal Information.  
15) Information in **Bold** is required. All other information is optional.  
16) Be sure to mark “Yes” for “Are you a volunteer?”  
17) Click “Continue.”

18) Using the member’s paper form, enter that the document was received, when it was received, and if consent was given for each Authorization.  
19) Click “Continue.”

20) Complete the Volunteer Screening form.  
21) If a Volunteer Screening form does not appear, return to the Personal Information page and check the “Are you a Volunteer?” field.  
22) Click “Continue.”

23) If the volunteer is a Club leader or volunteers for a particular Club, select the Club and Volunteer Type.  
24) Click “Add Club.”  
25) Click “Continue.”  
26) If the Volunteer is not involved in specific projects, activities or groups, click “Submit Enrollment.”
27) If the Volunteer helps with a particular project area, select the project and volunteer type.
28) Click “Add Project.”
29) Click “Continue.”
30) If the Volunteer is not involved in specific activities or groups, click “Submit Enrollment.”

31) If the Volunteer is involved with a specific Activity, select the activity and volunteer type.
32) Click “Add Activity.”
33) Click “Continue.”
34) If the Volunteer does not participate in a specific Group, click “Submit Enrollment.”

35) Click the “Groups” tab.
36) If the Volunteer is part of a specific Group, select the group and volunteer type.
37) Click “Add Group”
38) Click “Submit Enrollment”
39) The Adult will appear on the Member List as “Pending.”
40) After the State 4-H Office receives notification of a cleared background check, the State will approve the volunteer.

41) After the State 4-H Office approves the volunteer, the County needs to give final approval.
42) Click the “Enrollment” tab.
43) Click “Confirm Members”
44) Click “Login” next to the member.

45) Click on the “County Review” page.
46) Review the volunteer’s information.
47) If everything is correct and complete, click “Accept Member” at the bottom of the page.

48) The Volunteer enrollment status is now “Active.”
49) If the background check results return any restrictions, the restrictions are noted next to the form on the Member List.