

# USER MANUAL: PART 1

## Web-based Nutrition Education Evaluation and Reporting System



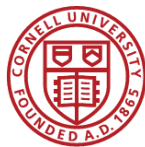
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## ***Introduction***

### **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 is 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.

The objectives of EFNEP are to assist limited resources families and youth in acquiring the knowledge, skills, attitudes, and changed behaviors necessary for nutritionally sound diets, and to contribute to their personal development and the improvement of the total family diet and nutritional well being.

### **About SNAP-Ed**

The Supplemental Nutrition Assistance Program – Education (SNAP-Ed) is a federal/state partnership that supports nutrition education for persons eligible for SNAP benefits. The Healthy, Hunger-Free Kids Act of 2010 established SNAP-Ed as the Nutrition Education and Obesity Prevention Grant Program by the USDA Food and Nutrition Service. The Act calls for SNAP-Ed to include an emphasis on obesity prevention in addition to nutrition education. Activities must be evidence-based and delivered through individual and group-based strategies, comprehensive multi-level interventions, and/or community and public health approaches. SNAP-Ed efforts may also address environmental and policy level interventions. National, State, and local coordination and

collaboration is strongly encouraged and recommended. Since 1988, Land-Grant Universities have been a primary provider of SNAP-Ed. They reach intended audiences by coordinating with state and local partners and with other contractors. Other contractors are state public health departments, food banks, tribal programs and local health organizations. The goal of SNAP-Ed through the Land-Grant University System is to provide educational programs and conduct social marketing campaigns that increase the likelihood that people eligible for SNAP benefits will make healthy food choices within a limited budget and choose physically active lifestyles consistent with *the Dietary Guidelines for Americans* and MyPlate.

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# Section 1 – The System – An Overview

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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 has been generated through United States Department of Agriculture (USDA), National Institute of Food and Agriculture (NIFA) to collect quantitative data about program participants and staff. The quantitative data consists of demographic and program output information (reported behaviors pre and post-education) representing the nutrition education offered through the Expanded Food and Nutrition Education Program (EFNEP). ***WebNEERS*** has been adopted by many Supplemental Nutrition Assistance Program – Education (SNAP-Ed) programs, run through the Land-Grant systems.

## **The Development, Hosting and Maintenance**

***WebNEERS*** is a secure web-based system designed, hosted, and maintained by Clemson University. ***WebNEERS*** has been 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 web site accessible system, including computers, iPads, Tablets and Smartphones. ***WebNEERS*** is compatible with\*:

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

Minimum specifications\*\*:

- 1.5MB download speed
- Windows XP

*\*If the program being used to access the Internet is unknown and/or the version of the software 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 is going to be.*

## **WebNEERS IP Address**

The IP Address for ***WebNEERS*** is dependent upon the program into which the user wishes to gain access. The Expanded Food and Nutrition Education Program (EFNEP) and the Supplemental Nutrition Assistance Program – Education (SNAP-Ed) each have a unique IP Address into which their respective program data are entered.

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 conducted using a secure protocol.

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, institution (university), and regional (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, manage and report on the program.

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

### ***Institution Level/Users***

The Institution level is referred to as the university level data, which is analogous to the former State Reporting System (SRS). The Institution level interface enables each state to define operating parameters, collect, manage and report on the program.

The Institution users are tasked with creating the environment for regional users into which data is to be reported. Their abilities include creating regions for Region level users to enter data into, managing their various regions subgroups, filters, checklists and public assistance programs, creating and managing annual updates / 5 year plans and creating new users.

### ***Region Level/Users***

The Region level is refers to the local level data, which is analogous to the former County Reporting System (CRS5). The Region level interface is the only level at which program participant personal identifiers (name, address, telephone number, etc.) are available.

The Region users are tasked with entering the actual program data for adults, staff, youth groups, and program impacts and delivery sites and partnerships for the annual updates / 5 year plans.

*To provide technical assistance, Institution level staff may have access to the local level interface.*

## System Components

**WebNEERS** incorporates local, 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, etc.). In addition, **WebNEERS** has added the ability to collect and aggregate the EFNEP 5-Year

Plan/Annual Update, the EFNEP budget and budget justification, and the social 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 particular user, at the discretion of the institution or region, if the permission is awarded to edit permissions. This level of customization is intended to address the needs of the various entities that provide nutrition education programming. 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 will have the ability to access will be the adults section, and they will only be allowed to enter new records, while the deleting and editing functionality is hidden from them.

## Important Features

### *Tabs*

Tabs have been utilized in **WebNEERS** to allow for a less crowded workspace. Tabs look and function like the tabs of files, and the active tab will connect directly to the form while inactive or hidden tabs are grayed out slightly and disconnected from the form by a few pixels. The active tab has black font; inactive tabs have blue font.



### *Hint:*

To quickly move between tabs hold the shift key and press the left or right arrow key on the users 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 will be able to 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 help 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 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 or to press the ESC key on the keyboard.

**Note:** *Closing a dialogue 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, as opposed to after an unsuccessful submission. 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 will be displayed when a required field is skipped or the data contained in the field does not meet the required format.

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

**Note:** *Error notifications are always red and serve only to alert the user that they will not be able to continue until they have been properly addressed.*

### Invalid Submission Behavior

If a user were to attempt to submit a form before it has been fully completed they will automatically be redirected to the first field that is incorrect and an error message 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, the correct data will not be lost. The user will be given the opportunity to fix their issues and continue forward without needing to re-enter any data.

### Highlighting the active field:

In order to make it easier to locate the active form field on the page, the field that has focus will be highlighted in yellow. For checkboxes and radian buttons a yellow box will appear around the element and its label, to indicate that it currently has focus.

New Youth Group

Attention Needed

CONTACT INFORMATION LEADERS ENTRY & EXIT DATA DEMO

Error Notifications

Name

Required field (outlined in red)

Mailing Name

Active Field (highlighted in yellow)






Address









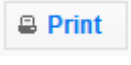


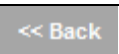

\* This field is required

## **Icons**

Icons are used in place of text to facilitate the user completing an intended task.

### Describing the Icons

	<b>Select</b>	This icon indicates an item is selected and will be included
	<b>De-select</b>	The absence of a check indicates the item will not be included
	<b>Manage</b>	The manage icon is used on the <b>Home page</b> to indicate the link is for a page where data may be created, edited or deleted
	<b>Report</b>	The report icon is used on <b>Home page</b> to indicate the link is for a page where a report can be created
	<b>Setup</b>	<p>The setup icon is used on <b>Home page</b> to indicate the link is for a page where system management takes place</p> <p>It is also used in the adult and youth group checklist sections to add additional question sets, when such sets are available</p> <p><b>*Note:</b> Additional question sets can only be added in the checklist</p>

		<i>sections if they are created by an institution level user and made available to that region</i>
	<b>Tables</b>	The tables icon is used on the <b>Home page</b> to indicate the link is for a page where system tables are located
	<b>Create/Add</b>	The create/add icon is used to bring up another screen that allows the user to create or add a new record
	<b>Edit</b>	The wrench icon is used to bring up another screen that allows the user to edit the information in a record
	<b>Delete</b>	The delete icon is used to delete a record from the database  <i>*Note: Before selecting the delete icon, please make sure the item selected/ the information highlighted should, in fact, be deleted. Once an item has been removed there is no way to restore it; you cannot “undo” a deletion.</i>
	<b>Calendar</b>	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>View Food Details</b>	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
	<b>Sort</b>	The sort icon is used to sort the data in a table in ascending and descending order  <i>*Note: Select the icon once to sort the column in ascending order (a,b,c...z. 0,1,2....) or select a second time to sort in descending order (z,y,x....a, 9,8,7....). The sorted column will show one arrow. If it is sorted ascending, it will be an up arrow; descending, a down arrow.</i>
	<b>Preview</b>	The preview icon is used to preview the data in a report
	<b>Print</b>	The print button is used to open the browser's print dialog box and print the information on the user's screen
	<b>Print/PDF</b>	The print/PDF icon has two functions. It either generates an onscreen report users can print or a *.PDF of the selected information that users can save or print
	<b>Home</b>	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
	<b>Back</b>	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
	<b>Download</b>	The download icon is used to download a comma separated value file (CSV) of the data

**Hint:**

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

## Screen Layout

The **Home page** of **WebNEERS** is substantially different from earlier versions of NEERS5. In order to reduce the number of steps needed to accomplish a task, all major items 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.

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 subsets 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. At the bottom of each column are additional links which include **Region, Users** (Adults column), **Tables** (Youth Groups column), and **Annual Updates, Checklists** (Staff column). *See the screenshot of the Region level Home page and the Institution level at the end of this section.*

The majority of the Institution 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), and
- Users (manage), Regions, Reporting Years, Tables, and Export data.

## Home, Breadcrumbs, Account Management, and Logout buttons

The very top is a dark gray bar. To the left is the **WebNEERS** logo, which will always return the user to the **Home page**. To the right is the username, user type (in parentheses), the countdown timer which tells you how long until you are automatically logged out of the system, and the option to manually Logout.



The next bar down is light gray. To the left is the breadcrumb trail, which allows the user to return assess where they are in the system and maneuver back to previous screens without selecting the browser “back” button. On the right is the name of the Institution the user is associated with and if you are logged in as a regional user, a dropdown box. The dropdown box is an Account Management field which identifies the Region into which the user is logged. If a user is assigned to multiple regions, they can use this dropdown box to switch between regions.

## Categories of Tasks

Within Adults, Youth Groups and Staff, a user is able to manage data, generate reports or setup local information.

## ***Manage – Adults, Youth Groups or Staff***

The tasks conducted under the category of manage include adding new adults, youth groups or staff, updating information currently in the system, or, when necessary, delete information. These options are only available at the regional level. Institution level users can only view aggregated data on adults, youth groups and staff. They cannot access any personally identifiable information.

### ***Adults:***

Adding new participants and/or editing participants already in the system are completed by selecting the **Manage Adults** link.

Managing recalls or checklists already in the system or to add an exit recall or checklist without going into the **Manage Adults** link, chose **Manage Recalls** or **Manage Checklists**.

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

### ***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.

Manage checklists already in the system, or to add exit checklists without going into the **Manage Youth Groups** link, chose **Manage Checklists**.

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

### ***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 for more information.*

***Note:** No adults or youth groups can be entered prior to the staff being added to **WebNEERS**.*

## ***Report s– Adults, Youth Groups or Staff***

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

### **Mailing labels** *(regional level only)*

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

### **Email lists** *(regional level only)*

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

### **Reports** *(regional and institution level)*

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.).

***Note:*** *For more information on the availability and uses of the Reports links see the appropriate section (Section 5 - Adults, Section 6 – Youth, Section 4 - Staff) for more information.*

## ***Set up***

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. Where needed, **Regional** and **Institution Level** users are able to create subgroups\* or filters for adults or youth groups; and create public assistance programs for adults.

***\*Note:*** *When a subgroup is created, a filter for that subgroup will need to also be created to pull these data out in summary reports at a later time. The creation of additional filters may be needed to limit report generation to specific characteristics of the program participants and/or youth groups.*

The **Region level** user has a few other setup options. Regional users are able to establish defaults for new entries. This might include the completion of certain fields within an adult or youth group record. They also have the ability to **Transfer Responsibilities** or move/reassign participants from one staff member to another without accessing each individual record.

***Note:*** *For more information on setting up the system to better meet local needs, see Section 3: Setup: Customizing the System to Meet Local Needs and Section 4: Manage Staff, Adding, Editing and Report to review the transfer responsibilities options.*

## **Region**

The region feature enables the user to review the information contained in **WebNEERS**. The type of information available varies by the level into which the user has signed.

### **Region Level**

The Region 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 the ability to export the data for use outside of the **WebNEERS**.

***Note:** The migration option is not visible to a region until the institution level user gives the region permission to move into the new reporting year.*

### **Institution Level**

The Institution 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.

## **User**

The user feature enables the logged in user to manage (add, edit or make inactive) other users in the system. Regional users can only manage other regional users; Institution users can manage other institution users and regional users. The ability to add or edit users or to 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 on which the diet recall data and poverty information is based. These tables provide the background on which the system analysis is conducted. These tables are provided for information purposes only and are not editable at either the Institution level or Region level. All edits will be conducted at the Federal level.

## **Update Annual Update/5-Year Plan**

The annual update/5-year plan feature enables the user to manage (add and edit) information contained in **WebNEERS**. The type of information available varies by the level into which the user has assigned.

### **Region Level**

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

### Institution Level

The Institution 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 Formula Grant Opportunity (FGO) in year's past. This section also allows Institution Level users to manage program impact and delivery sites data submitted by Region Level users and entered by Institution Level users.

### **Checklists**

The checklist feature enables Institution 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 Regional level users have the ability to view the available checklist sets and to run checklist related reports

***Note:** 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.*

### **Data Backup**

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

## **Helpful Hints for working in WebNEERS**

The section below contains guidance and helpful hints to assist in the data entry and review process.

### **Tables**

Tables in **WebNEERS** are much more dynamic than in NEERS, some main features include:

#### Search

A live search feature has been implemented to help users find specific records.

##### The Process:

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

A rectangular search input box with a light gray border. On the left side, the word "SEARCH:" is written in a small, dark font. To the right of the text is a white rectangular text entry field.

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 again.




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

#### The Process:

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 row in ascending order.
3. Subsequent clicks will toggle the sorting from ascending to descending order and display a down arrow (  ), depending upon the current state of the button

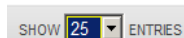
### Pagination

#### 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 pages. 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

### *Entry screens with Tabs*

Tabs have been utilized in **WebNEERS** to allow for a less crowded workspace. Tabs look and function like the tabs of files, and the active tab will connect directly to the form while inactive or hidden tabs are grayed out slightly and disconnected from the form by a few pixels. The active tab has black font; inactive tabs have blue font.



### Hint

*To quickly move between tabs hold the shift key and press the left or right arrow key on the user keyboard. The tabs will open and close according to the directional arrow the user pressed.*

### ***Use of tab key***

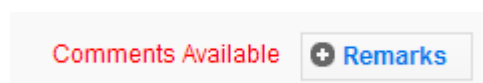
In order to speed up data entry, the user may choose to move between form fields by pressing the tab key. If the user is on the last input field of a screen that uses tabs, they will automatically be forwarded to the next tab when they press the tab key, provided the user is not currently on the last tab of the page.

### ***Hint***

To select/deselect check boxes click the space bar on your keyboard.

### ***Remarks***

**Adults** and **Youth Groups** have remarks boxes that are hidden from normal view. If the record being added or edited has remarks, it will be indicated by having the text **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 will be 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, 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.*

**Note:** 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.

**Note:** 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.

### ***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: Region level

The screenshot displays the SNAP-Ed Home Page at the Region level, organized into several functional panels:

- Adults Panel:** Includes links for Manage Adults, Manage Recalls, Manage Checklists, and Verify Addresses. A Reports section lists: Adult Mailing Labels, Email List (CSV), List of Families by Staff Member, 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 Panel:** Includes links for Manage Youth Groups, Manage Checklists, and Verify Addresses. A Reports section lists: 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 Panel:** Includes links for Manage Staff and Enter Hours. A Reports section lists: Staff Mailing Labels, Email List (CSV), Status, Staff List, Volunteer List, and Profile Summary. A Setup section includes: Add Staff and Transfer Responsibilities.
- Annual Update/5-Year Plan Panel:** Includes links for Manage Program Impacts, Edit Delivery Sites and Partnerships, and Output Other Report.
- Checklists Panel:** Divided into Adult (Manage Adult Checklist Sets, Manage Adult Questions) and Youth (Manage Youth Checklist Sets, Manage Youth Questions). A Reports section lists: 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.
- Region Panel:** Includes a link for View Region Info.
- Users Panel:** Includes links for View Users, Add User, and View Pending Users.
- Tables Panel:** Includes links for 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).

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

## *The Home Page: Institution level*

<b>Annual Update/5-Year Plan</b> <ul style="list-style-type: none"><li>✎ Manage Annual Updates</li><li>✎ Manage Program Impacts</li><li>✎ Manage Budget Files</li><li>✎ Manage Budget Justification</li><li>✎ Manage Delivery Sites and Partnerships</li></ul>	<b>Checklists</b> <p>Adult</p> <ul style="list-style-type: none"><li>✎ Manage Adult Checklist Sets</li><li>✎ Manage Adult Questions</li></ul> <p>Youth</p> <ul style="list-style-type: none"><li>✎ Manage Youth Checklist Sets</li><li>✎ Manage Youth Questions</li></ul> <p>Reports</p> <ul style="list-style-type: none"><li>■ Adult Checklist Set Report</li><li>■ Youth Checklist Set Report</li><li>■ Adult Question List Report</li><li>■ Youth Question List Report</li><li>■ Adult Question Detail Report</li><li>■ Youth Question Detail Report</li></ul>	<b>Users</b> <ul style="list-style-type: none"><li>✎ View Users</li><li>✎ Add User</li><li>✎ View Pending Users</li></ul>
<b>Summary Reports</b> <p>Adult</p> <ul style="list-style-type: none"><li>■ Adult Summary</li><li>■ Adult Diet Summary</li><li>■ Adult Checklist Summary</li></ul> <p>Youth</p> <ul style="list-style-type: none"><li>■ Youth Summary</li><li>■ Youth Checklist Summary</li></ul> <p>Staff</p> <ul style="list-style-type: none"><li>■ Staff Summary</li></ul>	<b>Setup</b> <p>Adult</p> <ul style="list-style-type: none"><li>⚙ Adult Subgroups</li><li>⚙ Adult Filters</li><li>⚙ Adult Public Assistance</li></ul> <p>Youth</p> <ul style="list-style-type: none"><li>⚙ Youth Subgroups</li><li>⚙ Youth Filters</li></ul> <p>Reports</p> <ul style="list-style-type: none"><li>■ Adult Subgroup List</li><li>■ Youth Subgroup List</li><li>■ Adult Filter List</li><li>■ Youth Filter List</li><li>■ Adult Public Assistance List</li></ul>	<b>Institute Regions</b> <ul style="list-style-type: none"><li>✎ Manage Regions</li><li>✎ Add Region</li></ul>
<b>Browse</b> <p>Adult</p> <ul style="list-style-type: none"><li>❗ Adult Summary</li><li>❗ Adult Diet Summary</li><li>❗ Adult Behavior Checklist</li></ul> <p>Youth</p> <ul style="list-style-type: none"><li>❗ Youth Summary</li><li>❗ Youth Behavior Checklist</li></ul> <p>Staff</p> <ul style="list-style-type: none"><li>❗ Staff Summary</li></ul>		<b>Reporting Years</b> <ul style="list-style-type: none"><li>✎ Manage Reporting Years</li></ul>
		<b>Tables</b> <ul style="list-style-type: none"><li>🔗 View Foods</li><li>🔗 Daily Recommendations</li><li>🔗 Recommended Calories</li><li>🔗 USDA Food Patterns</li><li>🔗 Dietary Reference Intakes</li><li>🔗 Poverty Guidelines Table</li></ul>
		<b>Data Management</b> <ul style="list-style-type: none"><li>■ Export Data</li></ul>

***Note:** If an Institution 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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## Creating New Users

### *The process*

1. Select **Add User** from the **WebNEERS Home page**
2. Enter the new user's **Email** address
3. Enter a **Verification Code**  
**Note:** *The verification code will need to be provided to the user in a separate email or alternative means of communication, as the email generated by **WebNEERS** will not provide the verification code. This is done to ensure the security of the system.*
4. Enter the user's **First Name**
5. Enter the user's **Last Name**
6. Select the **User Type**, Institution or Region
  - a. If Institution level, skip to permissions step
  - b. If Region level, select the Regions to which the user will be assigned
7. Select or unselect the *permissions to be granted* the user
8. Select **Save** at the bottom of the page

**Note:** *It will be important that the Region to which the user will be assigned is entered prior to any staff being entered. It is not required and the user can be edited to include the Region after the Region has been added, however, adding the Region first, saves time and effort.*

## User Permissions


Regional Level user permissions include the ability to add, edit, and delete adult participants, youth groups, staff, subgroups, filters and public assistance, as examples. Institution 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. 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 any given user. When permissions need to be added or removed from a user, the Institution level or Region level user, who has been granted permission 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.*

### *The process*




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 of the page

## Changing Region level Access

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.


### The Process

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 of the page

## Password Management

All users must register with a unique password, which will be encrypted and known to only the registered user. Should the password need to be changed, *WebNEERS* offers the user the option of managing his/her own password. If the password is forgotten, at the Login screen, the registered user can select **Forgot Password?**, enter his/her username (email address) and click **Get Password**. A temporary password will be forwarded to the registered email address provided. The email will come from System Admin. Users who do not receive the email in their inbox, should check their junk mail folder. 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.


### The Process:

1. Select the login information (  nifanutritionhealth@gmail.com (Region User) ) in the dark gray bar
2. Enter the current log in password, at the bottom of the page
3. Enter the new password and re-enter the password
4. Select the Update Password button to save the change

## Removing Users

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

### The Process


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

**Note:** The user will remain listed, but to the far right, the user will be identified as **No** under the column heading **Active** to signify that he/she is inactive and can no longer access the system.

## Reactivating Users

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

### The Process

1. Select **View Users** from the **WebNEERS Home page**
2. Select the **Plus icon** (  ) next to the user to be reactivated
3. Select **Ok**, when prompted “Are you sure you want to reactivate this user?”

***Note:** The user’s status to the far right will change to as **Yes** under the column heading Active to signify that he/she is active and can once again access the system.*

## Users Changing Regions into which data is added/edited

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

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

### The Process

1. Select the **Down arrow icon** located to the far right of the light gray bar located at the top of the **Home page**



2. Select the **Region** to which the user would like to access
3. Select **Ok**, when prompted “Are you sure you want to switch to region “.....”

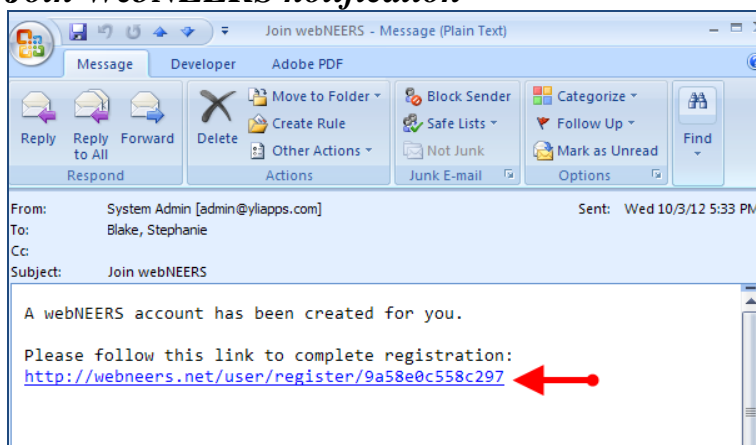
***Note:** The user will then be in the Region selected and can be verified in the light gray bar located at the top of the **Home page**. There will be no discernible difference between the Region pages; it is critical that users with multiple Region permissions verify the region in which they are prior to any work being conducted in **WebNEERS**.*

## Approval Process for Users

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

***Note:** See the screenshot below to review a sample of the email notification.*

### ***Join WebNEERS notification***



### ***The Process***

1. Staff will need to select link in the **Join WebNEERS** email. The staff will be forwarded to a screen that looks like the image below

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

A screenshot of the WebNEERS registration form. At the top is the WebNEERS logo, which consists of a red apple icon with the word "WEB" above it and "NEERS" to its right. Below the logo, the "Email:" field is pre-filled with "sblake@nifa.usda.gov". There are three input fields: "Verification code:", "Create Password:", and "Confirm Password:". Below these fields, it says "Version 0.9.5.1". At the bottom is a blue button labeled "Register".

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

2. Staff will need to enter the **Verification code** which was forwarded, in a separate email or by some other means of communication, when the user added to the system
3. Staff will need to create a **Password**, which they will need to remember.

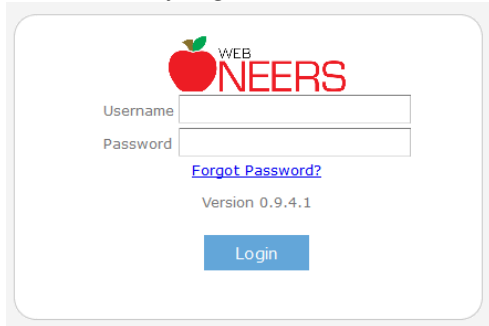
***Note:** The password will need to be reentered to complete the registration process*

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

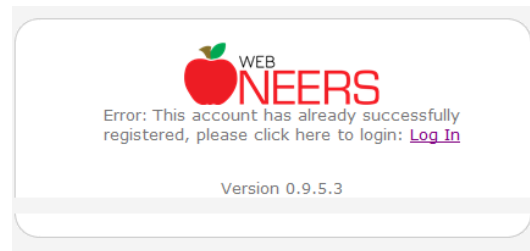
## ***Log In Once Registered***

The log in screen, once the user has successfully registered, will look similar to the image below.

### *Screenshot of login*



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



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

## **Recommendations for Accessing WebNEERS**

### ***Creating bookmark(s)***

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

## ***Section 3: Setup: Customizing WebNEERS to Meet Local Needs***

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## Customizing the System to Meet Local Needs

**WebNEERS** has been developed to provide a high degree of flexibility to enable Institution level and Region level users 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, 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 setup at the Regional and the Institutional level 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 population 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.*

### Adding Defaults for New Adults

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 level that the user is assigned.*

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

2. Select **Add Default**

The screenshot shows the WebNEERS interface for managing defaults for new adults. The page title is "Defaults for New Adult". A red box highlights the "+ Add Default" button, with a red arrow pointing to it. Below the button is a search bar and a table with columns: Manage, Name, Staff, City, and Zip. The table is currently empty, showing "No data available in table" and "SHOWING 0 TO 0 OF 0 ENTRIES".

### 3. Name the **Adult Default**

*Note: This is the only required field for a default.*

WebNEERS

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

**Name of Adult Default** \* This field is required

**Staff**  
--Select One--

**City**  
[Text Field]

**State**  
DC

**Zip**  
[Text Field]

**Residence Type**  
--Select One--

**Lesson Type**  
--Select One--

**Subgroups**

- ☒ F: EFNEP
- ☐ F: ESWIC
- ☐ F: Sample
- ☐ F: SNAP-Ed
- ☐ F: Team Nutrition

### 4. Select the fields to be automatically populated for the new **Adults**

- Staff** – to whom the default applies if limited to a particular staff member
- City** – if the city in which the participant is educated or lives is likely to be known
- Zip** – if the zip code is a likely known value
- Residence Type** – these are the same as what are found in the adult section
- Lesson Type** – these are the same as what are found in the adult section
- Federal, Institution and Region 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.


## Viewing

- 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 level that the user is assigned.*

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

## 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 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*

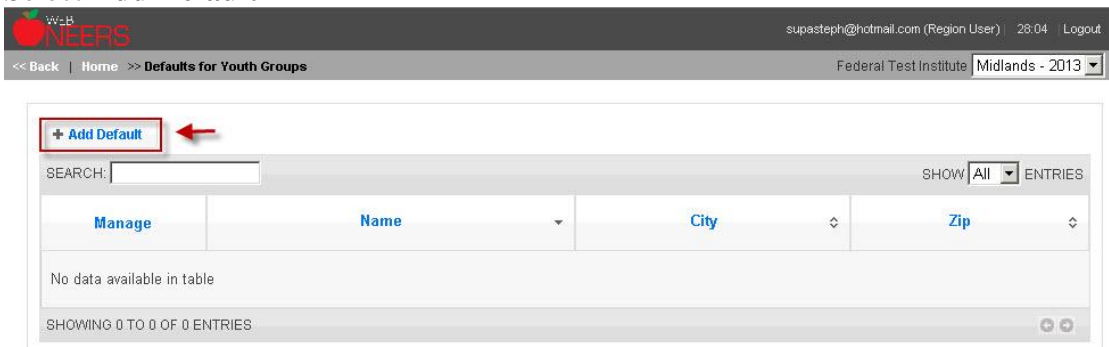
## Adding Defaults for New Youth Groups

1. Select **Defaults for New 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 level that the user is assigned.

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

2. Select **Add Default**



The screenshot shows the WebNEERS application interface. At the top, there is a header bar with the WebNEERS logo on the left and user information (supasteph@hotmail.com (Region User), 28:04, Logout) on the right. Below the header is a navigation bar with links: << Back, Home, >> Defaults for Youth Groups. On the right of the navigation bar, it says 'Federal Test Institute' and 'Midlands - 2013' with a dropdown arrow. The main content area has a '+ Add Default' button highlighted with a red box and a red arrow pointing to it. Below this button is a search bar labeled 'SEARCH:'. To the right of the search bar is a 'SHOW' dropdown menu set to 'All' and a link to 'ENTRIES'. Below these is a table with columns: 'Manage', 'Name', 'City', and 'Zip'. The 'Manage' column contains a blue link. The table is currently empty, with the text 'No data available in table' displayed. At the bottom of the table, it says 'SHOWING 0 TO 0 OF 0 ENTRIES'.

### 3. Name the **Youth Default**

***Note:** 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** – 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 known value
  - d. Federal, Institution 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 New 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 level that the user is assigned.*


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

### **Editing Defaults for New Youth Groups**

1. Select **Defaults for New 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 New 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 Institution Level and the Regional Level 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 which filter type was created) to see only that specific subset of data. Institutions and regions may create their own subgroup codes if desired. Institute (I) and Region (R) level subgroup codes do not transmit to the Federal level.

## Adding Subgroups:

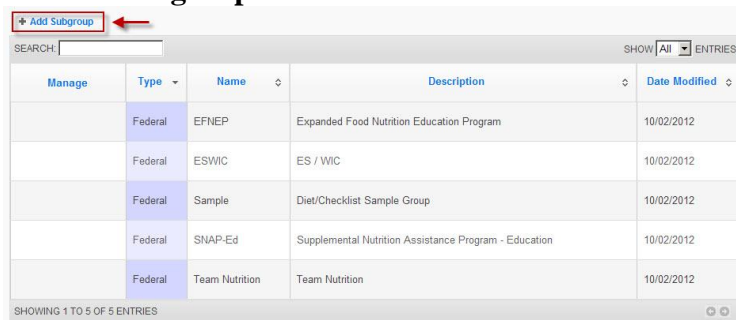
1. Select **Subgroups** on the **WebNEERS Home page** under the **Adults** or **Youth Groups Setup** section(s).

**Note:** This will display all of the subgroups currently available for the Institution level or Region level that the user is assigned.

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

**Note:** Adding subgroups 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.

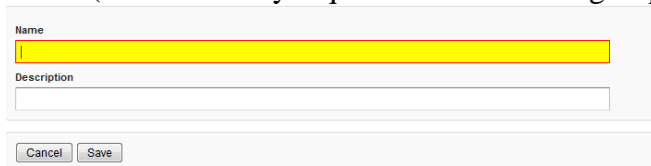
2. Select **Add Subgroup** at the left of the screen above the table of subgroups.



The screenshot shows a web interface for managing subgroups. At the top left, there is a button labeled '+ Add Subgroup' with a red arrow pointing to it. Below this is a search bar and a 'SHOW' dropdown menu set to 'All'. The main part of the interface is a table with the following columns: 'Manage', 'Type', 'Name', 'Description', and 'Date Modified'. The table contains five rows of data, all with 'Federal' as the Type. The subgroups listed are EFNEP, ESWIC, Sample, SNAP-Ed, and Team Nutrition. At the bottom left of the table, it says 'SHOWING 1 TO 5 OF 5 ENTRIES'.

Manage	Type	Name	Description	Date Modified
	Federal	EFNEP	Expanded Food Nutrition Education Program	10/02/2012
	Federal	ESWIC	ES / WIC	10/02/2012
	Federal	Sample	Diet/Checklist Sample Group	10/02/2012
	Federal	SNAP-Ed	Supplemental Nutrition Assistance Program - Education	10/02/2012
	Federal	Team Nutrition	Team Nutrition	10/02/2012

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



The screenshot shows a form for creating a new subgroup. It has two main input fields: 'Name' and 'Description'. The 'Name' field is highlighted in yellow. Below the 'Description' field, there are two buttons: 'Cancel' and 'Save'.

4. If you are an Institution Level user, **check the regions** you want the Subgroup to be available to.
5. Select **Save** to save the subgroup and return to the list of subgroups or **Cancel** to return to the list of subgroups.

## Viewing Subgroups

1. Select **Subgroups** on the **WebNEERS Home page** under the **Adults** or **Youth Groups Setup** section(s).

**Note:** Institute level subgroups and Federal Level subgroups will show up here automatically if applied by the federal or institute user.

**Note:** This will display all of the subgroups currently available for the region into which the user is assigned. If there are multiple users in a region, all subgroups created, by all Region level users, will be available here.


#### To view only Regional level subgroups

Type the word “Regional” into the live search option at the top left of the table. This will filter the results. You can also do this for Institution and Federal subgroups.

#### To view all available subgroups in a report


Select **Subgroup List** on the **WebNEERS Home page** under the **Adults** or **Youth Groups Reports** section(s)

### **Editing Subgroups**

1. Select **Subgroups** on the **WebNEERS Home page** under the **Adults** or **Youth Groups Setup** section(s)
2. Select the **Wrench icon** () , under the **Manage** column, located to the left of the subgroup to be edited
3. Adjust the **Name** and/or **Description**, as appropriate
4. Select **Save** at the bottom of the task or select **Cancel** to leave the Subgroup unchanged.

**Note:** Federal level subgroups cannot be edited. Institution level subgroups can only be edited by Institution Level Users; Regional level subgroups can only be edited by Regional level users.

### **Deleting Subgroups**

1. Select **Subgroups** on the **WebNEERS Home page** under the **Adults** or **Youth Groups Setup** section(s)
2. Select the **Delete icon** () , under the **Manage** column, located to the left of the subgroup to be deleted
3. Select **Ok**, when prompted with “Are you sure you want to delete?” or select **Cancel** to maintain the subgroup in **WebNEERS**

**Note:** Federal level subgroups cannot be deleted. Institution level subgroups can only be deleted by Institution Level Users; Regional level subgroups can only be deleted by Regional 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 adult data using

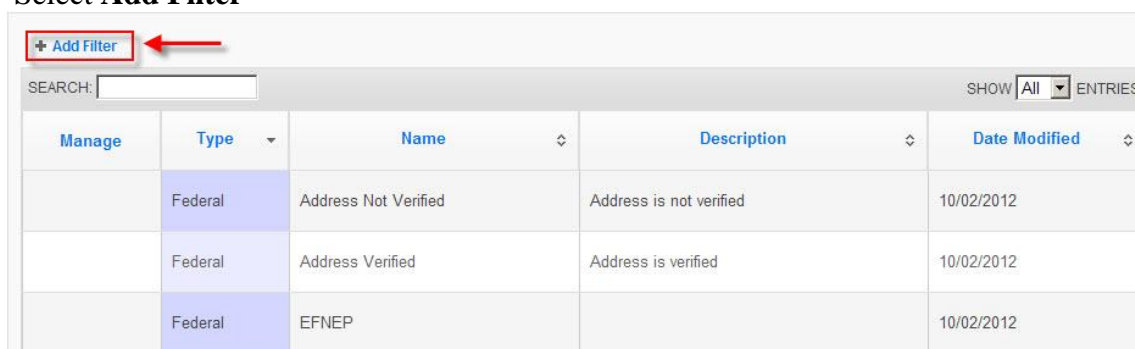
logical expressions. This is useful for viewing summary reports. When the filter is used, only adults or youth groups who meet the filter criteria are included in the report. The default filter **all adults or all youth groups** may be used to include all participants. Filters are designated Federal (F), Institute (I), or Region (R), depending on who prepared the filter. Region users cannot revise or delete Institute or Federal filters.

## Adding Filters

1. Select **Filters** on the **WebNEERS Home page** under the **Adults** or **Youth Groups** section – this will display all of the filters currently available.

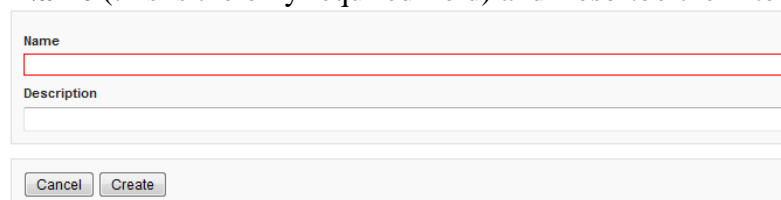
***Note:** If there are multiple users in a region, all filters created, regardless of who created the filter in the Region, will be available and listed on this screen.*

2. Select **Add Filter**



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



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 is equal to the total number of adults or youth groups in the region or the institution. The number will update as you apply characteristics to the filter.*

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

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

5. Identify the characteristics of the participants to be filtered.

**a. Demographic Option** (Adult and Youth Filters)

***Note:** 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)

***Note:** Select one or more subgroups 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) subgroup, highlight that group in the **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 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 – not in both X and Y – i.e., Either Not in X or Not in Y (NAND)

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

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

**Note:** Public Assistance is not collected for Youth Groups and therefore cannot be filtered.

**Note:** 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 public assistance – not in both X and Y – i.e., Either Not in X or Not in Y (NAND)

**Note:** A public assistance selected in one column cannot be selected in another, while multiple public assistances can be selected in the same column.

6. If you are an Institution Level user, **check the regions** you want the Filter to be available to.
7. Select **Save**, when all characteristics/subgroups/public assistance (for adults) items have been identified.

## Viewing Filters

1. Select **Filters** on the **WebNEERS Home page** under the **Adults** or **Youth Groups Setup** section(s)

**Note:** Institute level Filters and Federal level Filters will show up here automatically if applied by the federal or institute user.

**Note:** This will display all of the Filters currently available for the region into which the user is assigned. If there are multiple users in a region, all Filters created, by all Region level users, will be available here.


#### To view only Regional level Filters

Type the word “Regional” into the live search option at the top left of the table. This will filter the results. You can also do this for Institution and Federal filters.

#### To view all available Filters in a report


Select **Filter List** on the **WebNEERS Home page** under the **Adults** or **Youth Groups Reports** section(s).

### **Editing Filters**

1. Select **Filters** on the **WebNEERS Home page** under the **Adults** or **Youth Groups Setup** section(s)
2. Select the **Wrench icon** () , under the **Manage** column, located to the left of the Filter to be edited
3. Adjust the **Name** and/or **Description**, as appropriate
4. Select **Save** at the bottom of the task or select **Cancel** to leave the Filter unchanged.

**Note:** Federal level filters cannot be edited. Institution level filters can only be edited by Institution Level Users; Regional level filters can only be edited by Regional level users.

### **Deleting Filters**

1. Select **Filters** on the **WebNEERS Home page** under the **Adults** or **Youth Groups Setup** section(s)
2. Select the **Delete icon** () , under the **Manage** column, located to the left of the Filter to be deleted
3. 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. Institution level filters can only be deleted by Institution Level Users; Regional level filters can only be deleted by Regional 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. Institutions and regions may create their own public assistance codes if desired. Institute (I) and Region (R) level public assistance codes do not transmit to the Federal level.

### ***Adding Public assistance:***

1. Select **Public assistance** on the **WebNEERS Home page** under the **Adult Setup** section.

***Note:** This will display all of the public assistance currently available for the Institution level or Region level that the user is assigned.*

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

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



The screenshot shows a web interface for managing public assistance. At the top left, there is a link labeled '+ Add Public Assistance' enclosed in a red rectangular box, with a red arrow pointing to it from the right. Below this link is a search bar with the placeholder text 'SEARCH:'. To the right of the search bar is a 'SHOW' dropdown menu currently set to 'All', followed by the word 'ENTRIES'. Below these elements is a table with the following columns: 'Manage', 'Type', 'Name', 'Description', 'Food Assistance', 'Active', and 'Date Modified'. The table contains five rows of data, all with 'Federal' as the 'Type'. The third row, 'Head Start', is highlighted in yellow. The 'Active' column shows 'Yes' for all rows except 'Head Start' and 'Other', which show 'No'.

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



The screenshot shows the 'Add Public Assistance' form. The 'Name' field is highlighted with a red border, and a red error message '\* This field is required' is displayed next to it. Below the 'Name' field is the 'Description' field. There are two checkboxes: 'Food Assistance' (unchecked) and 'Active' (checked). At the bottom of the form are 'Cancel' and 'Save' buttons.

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.
5. If you are an Institution 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***

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

**Note:** Institute level public assistance and Federal Level public assistance will show up here automatically if applied by the federal or institute user.

**Note:** This will display all of the public assistance currently available for the region into which the user is assigned. If there are multiple users in a region, all public assistance created, by all Region level users, will be available here.


#### To view only Regional level public assistance

Type the word “Regional” into the live search option at the top left of the table. This will filter the results. You can also do this for Institution and Federal public assistance programs.

#### To view all available public assistance in a report


Select **Public Assistance List** on the **WebNEERS Home page** under the **Adult** section

### **Editing Public assistance**

1. Select **Public Assistance** on the **WebNEERS Home page** under the **Adults Setup** section(s)
2. Select the **Wrench icon** () , under the **Manage** column, located to the left of the public assistance to be edited
3. Adjust the **Name**, **Description**, Food Assistance checkbox, or Active checkbox as appropriate
4. Select **Save** at the bottom of the task or select **Cancel** to leave the Public assistance unchanged.

**Note:** Federal level public assistance cannot be edited. Institution level public assistance can only be edited by Institution Level Users; Regional level public assistance can only be edited by Regional level users.

### **Deleting Public assistance**

1. Select **Public assistance** on the **WebNEERS Home page** under the **Adults Setup** section(s)
2. Select the **Delete icon** () , under the **Manage** column, located to the left of the public assistance to be deleted
3. 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. Institution level public assistance can only be deleted by Institution Level Users; Regional level public assistance can only be deleted by Regional level users.

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

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## ***Staff Section***

The Staff Section is used to access, edit and view Staff related information. In previous versions of the Nutrition Education Evaluation and Reporting System (NEERS) separate screens existed to maintain professional, paraprofessional and volunteer data. These sections have been combined in **WebNEERS** but the ability to run reports on individual staff types still exists. Managing staff is only possible as a Regional User.

## ***Managing Staff***

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

### **Classifications of Staff:**

#### ***Examples of Professional staff are:***

- Nutrition supervisors
- Supervising Community Educators (paid at the salaried staff position, not hourly rate)
- Community Educators (paid at the salaried staff position, not hourly rate) whose primary responsibility is to carry a caseload and/or provide nutrition education

#### ***Examples of Paraprofessional staff are:***

- Supervising Community Educators (paid at the hourly rate, not as a salaried positions) who carry a caseload and provide – day-to-day supervisor of other staff
- Frontline Staff (staff delivering direct education)

#### ***Examples of Volunteer staff are:***

- Persons from the community who assist in programming, who are not paid for their efforts.

***Note:*** Entry of adult records requires designation of the assigned staff member and entry of youth groups requires identification of the group's leaders. Thus, entry of the staff members should be one of the first tasks with a new database. Additionally staff that are no longer active should be deleted.

## Staff IDs

Staff IDs can be set in one of two ways:

### ***Automatic Creation***

- **WebNEERS** will automatically assign a unique number as the identifier for a staff member, unless a Custom ID number is created
- If a Custom ID is not defined at the point of creation, it cannot be added later

**Note:** *Once an ID has been created, it cannot be changed.*

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

### ***Custom Creation***

Any custom identifier may be assigned to a staff person. The only requirements for this is that it must be unique for that institution and it must not contain any special characters.

**Note:** *Once this ID has been created and saved it cannot be used again and it cannot be changed.*

## 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**. All staff, regardless of their “*salary classification*” are divided as such:
  - a. Professional – *manage the program and/or data entry*
  - b. Paraprofessional – *primary responsibility is to carry a caseload*
  - c. Volunteer\* – *person who is not paid by Cooperative Extension to provide EFNEP/SNAP-Ed services*

**\*Note:** *When adding a volunteer the user will be required to select the staff supervisor for the volunteer*

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 screen shot*

New Staff - Professional and Paraprofessional

DEMOGRAPHICS HOURS

First Name Last Name

Address

City State Zip

Phone Ext

Email

Gender

Ethnicity

Race

Attention Needed

### *Volunteer screen shot*

New Staff - Volunteer

DEMOGRAPHICS HOURS

First Name Last Name

Staff

Address

City State Zip

Phone Ext

Email

Gender

Ethnicity

Race

Age Code

Is Current/Formal EFNEP Participant

Role

Attention Needed

**Note:** The red flag – this warning is used throughout the system to let the user know when something is missing that is required.

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

**Volunteer roles** are defined as follows:

- Instructional – teaches/educates/helps deliver information on food and nutrition, as well as related subject matter to adults and youth

- Advisory Committee – serves on Advisory Committee
- Educational Services – provides clerical help; recruits; provides publicity and public relations
- Support Services – provides babysitting, transportation, meeting place, refreshments, equipment, clothing, housekeeping arrangements, emergency food, or financial help
- Middle Manager – unpaid service to, or leadership of, other volunteers by a youth or adult

### Not entering hours when adding staff

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

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

9. Select **Confirm** when prompted “You have not entered any hours for this staff member. Are you sure you want to save?”

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

### Entering hours when adding staff

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

#### *Hours tab screen shot*

P05703: New Staff - Paraprofessional


DEMOGRAPHICS HOURS

Annual Hours Spent With Adults and Youth by Program		
Program	Adult	Youth
EFNEP	0	0
SNAP-Ed	0	0
State Project	0	0
Other	0	0
Adult / Youth Totals	0	0
Total	0	

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

### **Viewing or Editing Information for Existing Staff**

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


3. Select the **Wrench icon** (  ), under the options column, beside the staff member to be viewed/edited
4. View and/or edit the information on the selected staff person  
*Note: all required information is outlined in red*
5. Select **Save** at the bottom of the page.

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

### **Updating Staff Hours in WebNEERS**

*Capturing and recording actual staff hours is essential. Reporting the actual 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.*


#### **The Process:**

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.

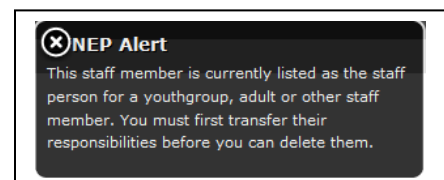
### **Deleting Staff and/or Volunteers**

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

***Note:** if a 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 their accounts deactivated. See Section 2.*

1. Log into the appropriate **WebNEERS** (EFNEP or SNAP-Ed)
2. Select **Manage Staff** from the **WebNEERS Home page**
3. Select the **Delete icon** (  )
4. Select **Ok** on the pop-up screen that indicates “Are you sure you want to delete <name of person>?”

***Note:** If a pop-up message appears in the upper right-hand corner of the screen, see image right, the staff or volunteer will need to have the assigned adults or youth groups 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.

***Note:** It should be noted that staff who have volunteers and/or participants (adult or youth) to whom they are assigned may not be deleted until which time 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.*

## Reports and Reporting

### ***Staff Mailing Labels***

Mailing labels 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.

### **The Process**

1. Select **Staff Mailing Labels** from the **WebNEERS Home page**
2. Select the appropriate **Staff Type** (the user may choose one or more)  
***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 - This is how labels have printed in previous versions of the NEERS software. 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**
    - i. The \*.pdf is useful if the user wishes to print the labels directly from a file.
    - ii. *If selected* a browser window will open and the file will automatically begin to download.
  - b. For Spreadsheet: Select **Save as Spreadsheet**
    - i. 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.
    - ii. *If selected*, a browser window will open and the user will be asked to choose a destination for the file to be saved.

## Screenshot

The screenshot shows a web interface for selecting staff types and label types. It includes checkboxes for Professional, Paraprofessional, and Volunteer, a dropdown for 'All', a table for Label Types with columns Avery #, Dimensions, and Across, a Print Direction dropdown set to Horizontal, a Sort dropdown set to Zip Code, and buttons for Print PDF and Save as Spreadsheet.

	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

## **Email List (CSV)**

The Email list report will export the email addresses entered for each staff type into a \*.csv file that can be used for creating mailing or distribution lists, and/or entered into a web-based software system to allow for bulk emailing.

### The Process

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 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.

### The Process

1. Select **Status** from the **WebNEERS Home page**, under **Reports** in the staff section
2. Select dates for the report
  - a. The user may either manually enter dates in the **Begin Date** and **End Date** section or click the calendar icon beside the field to select dates from a drop down calendar.
  - b. If no dates are specified, the system will automatically return a report with all available staff for the current reporting year.
3. Select **Submit**
4. The report will be displayed on the screen.

## **Staff List**

The Staff List report is useful for quickly viewing both individual and total staff hours and FTEs of Professionals, Paraprofessionals or both.

### The Process

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 useful for quickly viewing both individual and total hours and FTEs for Volunteers.

### The Process

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

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

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

*Note: If **For a Staff Member** (step 2 above) has been 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**

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

### The Process

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.

## Transfer Responsibilities

The transfer responsibilities section allows the user to transfer the primary staff member for adults or youth groups 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 or youth groups 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***

### The Process

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, or both
3. Select the **To Staff** to designate the **staff person** who will receive the adults, youth groups, or both
4. Select the data to transfer
  - a. **Adult** participants
  - b. **Youth groups**

***Note:** All adults, all youth groups or all adults and all youth groups can be transferred from one staff person or volunteer to another.*

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 and youth
  - b. Select **Cancel**, when prompted “Are You Sure You Want To Transfer These Responsibilities” to cancel the transfer of adults and youth
7. A confirmation message for adults, youth groups or both will appear if the transfer was successful.

### Screenshot

Transfer Responsibilities From **--From Staff--** To **--To Staff--**

\* This field is required

**Data to Transfer**

☒ Adults

☒ Youth Groups

### Caution:

Removing a staff member does not remove their access to **WebNEERS**. Staff who have left employment will need to have their user privileges, if any are awarded, removed and/or the user should be deactivated from the **WebNEERS**. This changing of privileges or removing of users will need to be completed in all applicable **WebNEERS**.

## ***Section 5 – Managing Adults; Adding, Editing, and Reporting***

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## Adult Section

The Adult Section is used to access, edit and view Adult related information. Managing Adults is only possible as a Regional User.

## Performing Adult Data Entry into the WebNEERS System

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 institution and the federal levels, the data entry person is key to an accurate, comprehensive, and quality report.

## Managing Adults

### ***Adding New Adult Participants:***

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

***Note:** Remember EFNEP and SNAP-Ed data are entered at different <https://> pages.*

2. Select **Manage Adults** from the **WebNEERS Home page**
3. Select **Add Adult**
4. Select the **Staff Member** from the drop down list

***Note:** Remember staff must be entered before adults or youth groups can be entered. If the staff member needed is not listed, select **Cancel** and return to the WebNEERS Home page; enter the desired staff member as a new staff member. See section 2: Managing Staff for more information on this topic.*

### **Hint:**

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

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

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


***Note:** Tracking the number of different series planned/offer is a reporting requirement in the Education and Administrative Reporting System (EARS) required by the USDA –Food*

The screenshot shows a web form titled 'Staff Member'. It contains four dropdown menus: 'Staff Member' (with '--Staff By Name--' selected), 'Program Status' (with 'Active' selected), 'Custom ID' (empty), and 'Default' (with '--Select One--' selected). At the bottom of the form are two buttons: 'Cancel' and 'Next'.

*and Nutrition Services (FNS) for programs receiving SNAP-Ed funds. This cannot be tracked in WebNEERS.*

7. **Optional:** Select an **Adult Default** - defaults will need to be established before this step can be used. See Section 3 – Setup: Customizing **WebNEERS** to Meet Local Needs for more information on this topic.

***Note:** The staff member selected above will override the staff member selected in the adult default. If the default that will be selected 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.*

8. Select **Next**
9. 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.
  - a. Enter the **Enrollment date** (first date of education and/or data collection)
    - 1) Type manually - MM/DD/YYYY format or
    - 2) Select the Calendar Icon () and choose the correct date
  - b. Enter participant name (**First** and **Last**)
  - c. Enter the **Address** to be used for the participant
  - d. Enter the **City** and **Zip**.
  - e. Enter the **Phone** number – including the area code.
  - f. Enter the **Email** address, if provided.

***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.*

#### Helpful Hints – Contact Info tab:

1. Fields outlined in red are required fields and must be filled in before the record can be saved.
2. Do not Save at this point. The record will not save until the **ENTRY DATA** has been added. Clicking save will save all data entered on all tabs on the form so it does not have to be clicked every time a tab is completed.

## Screenshot

**Note:** 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.

### 10. Select the **ENTRY DATA** tab

### 11. Complete the entry of the demographic information, as collected on the *Adult Entry/Enrollment* form. See the screen shot below.

- a. Enter the **Age** of the participant
- b. Indicate **Gender** of the participant
- c. Indicate if **Pregnant** or **Nursing**

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

- d. Indicate **Ethnicity**
  - i. Not Hispanic/Latino
  - ii. Hispanic/Latino
  - iii. Not provided
- e. Indicate **Race** – Multiple races may be selected.

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

**Helpful Hint:**

If tabbing through the data entry field, the space bar can be used to select/deselect checkboxes

- f. Indicate **Sub Race** – if necessary

***Note:** Collecting additional information on Race/Ethnic Subcategories is optional*

- g. Indicate **Highest Grade** completed

***Note:** Options are:*

Grade 6 or less	Grade 10	Some College
Grade 7	Grade 11	Graduated 2 year College
Grade 8	Grade 12	Graduated College
Grade 9	GED	Post Graduate

- h. Indicate **Town Size**

***Note:** Options are:*

Farm
Towns under 10,000 and rural non-farm
Towns and cities 10,000 – 50,000 and their suburbs
Suburbs of cities over 50,000
Central cities over 50,00

- i. Indicate **Public Assistance** at Entry

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

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

- j. Record the **Household Income** - enter “N/S” for not supplied

***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 Food Stamps, WIC, or other supplemental foods program benefits.*

- k. Record **Children**

- I. Children’s ages must be separated by commas; do not use spaces
- II. Use 0 for infants
- III. Repeat child age for twins/multiples
- IV. Do not include children over 19 years of age in this **Children** field

**Example:**

Children aged 1, 5, 7, 13 would be entered 1,5,7,13; Twin example: 1,2,2,4

**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**, see right, automatically calculates. Double check to make sure the values in the age ranges reflects the number of children, by category the user intended.

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

l. 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.

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

n. Indicate the **Lesson Type**

**Note:** Options are:

Group
Individual (reflecting one-on-one education)
Both Group and Individual
Other

o. Indicate the appropriate **Subgroups**

- 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.
- If **Default Profiles for New Adults** were not previously created, choose the appropriate Subgroups.

**Note:** At least one Federal Subgroup (F) must be selected. EFNEP will automatically be selected as the default program in the EFNEP system; SNAP-Ed in the SNAP-Ed system. The user may change or add additional subgroups as needed. The user may also select appropriate Institution Level (I) and Region Level (R) subgroups as needed. More than one subgroup can be selected at a time.

## Screenshot

The screenshot displays the 'CONTACT INFO' tab of the WebNEERS system. The form is divided into several sections:

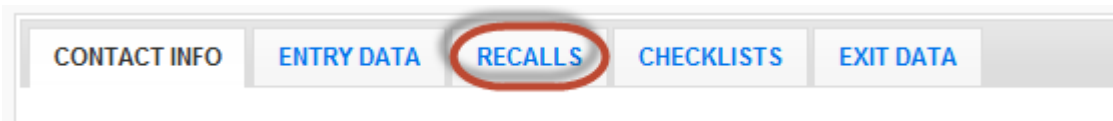
- Adult Information:** Includes fields for Age, Gender (set to Female), Pregnancy status, Nursing status, Ethnicity (set to --Select One--), Race (with a list of options including American Indian or Alaskan Native, Asian, Black or African American, Native Hawaiian or Other Pacific Islander, White, and Not Provided), Sub Race (set to --Sub Race--), Highest Grade (set to Not Supplied), and Residence (set to --Select One--).
- Household Information:** Includes Household Income (\$/month) (set to N/S), Children (set to 2), Children Age Breakdown (Ages 0-5: 0, Ages 6-13: 0, Ages 14-19: 0), Others In Household, and Total Household (set to 1).
- Lesson Type:** Set to --Select One--.
- Subgroups:** A list of checkboxes for various subgroups, including F: EFNEP (checked), F: ESWIC, F: SNAP-Ed, F: Team Nutrition, F: Sample, I: Community Center Participant, I: Share Our Strength, R: St. John's Center, and R: MoCo Activity Center.
- Public Assistance at Entry:** A list of checkboxes for various public assistance programs, including F: Child Nutrition, F: FDIPIR, F: Head Start, F: Other, F: SNAP, F: TANF, F: TEFAP - Commodity, F: WIC/CSPF, I: Old Pub. Asst., I: State Sponsored Public Assistance Program, and R: Local Food Assistance.

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

**Note:** At this point, the adult entry contact information, demographic and program characteristic data has been entered into WebNEERS and the adult has been saved. Upon selecting Save – step 10.p. above – the user can continue forward and enter recalls and/or checklists or click save again to exit the record and return to the Manage Adults table, which lists all enrolled adults.

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

12. Select the **RECALLS** tab




The screenshot shows a horizontal navigation bar with five tabs: 'CONTACT INFO', 'ENTRY DATA', 'RECALLS', 'CHECKLISTS', and 'EXIT DATA'. The 'RECALLS' tab is highlighted with a red circle.

13. Select **Add Recall**

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

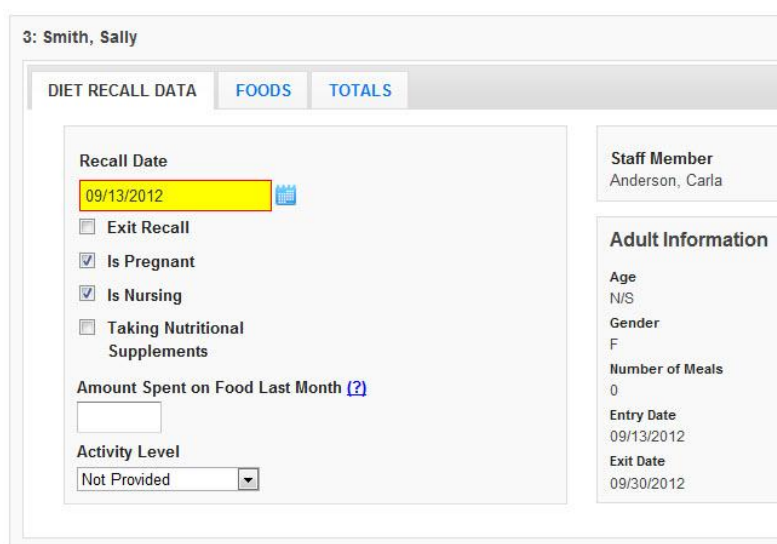
14. Enter the **Recall Date**

- Type manually - MM/DD/YYYY or
- Select the Calendar

Icon (  ) and choose the correct date

15. Indicate if the participant **Is Pregnant**

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



The screenshot shows a form for '3: Smith, Sally'. The 'DIET RECALL DATA' tab is selected. The form includes fields for 'Recall Date' (09/13/2012), 'Exit Recall' (checkbox), 'Is Pregnant' (checkbox), 'Is Nursing' (checkbox), 'Taking Nutritional Supplements' (checkbox), 'Amount Spent on Food Last Month (?)' (text field), 'Activity Level' (dropdown menu), and 'Staff Member' (Anderson, Carla). There is also an 'Adult Information' section with fields for 'Age' (N/S), 'Gender' (F), 'Number of Meals' (0), 'Entry Date' (09/13/2012), and 'Exit Date' (09/30/2012).

**Note:** this option will not be visible for male participants

16. Indicate if the participant **Is Nursing**

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

**Note:** this option will not be visible for male participants

17. Indicate if the participant **Taking Nutritional Supplements**

18. Enter the **Amount of money Spent on Food Last Month**

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

19. Indicate the **Activity Level**

*Note: Options are:*

Not provided	30-60 minutes
<30 minutes	>60 minutes

20. Select the **FOODS** tab

The screenshot shows a web interface with three tabs: 'DIET RECALL DATA', 'FOODS', and 'TOTALS'. The 'FOODS' tab is highlighted with a red circle. Below the tabs is a table with columns: 'Manage', 'Meal', 'Description', 'Number of Portions', and 'Portions'. An 'Add food' button is located above the table.

21. Select **Add Food**

*Note: A search box will pop-up.*

The screenshot shows a 'FOOD SEARCH' pop-up window. It has a search bar with a yellow highlight and a 'SHOW All ENTRIES' button. Below the search bar is a table with columns: 'Description', 'Additional Description', and 'Food Code'. The table lists three items: 'Chicken nuggets', 'Cake, chocolate, devil's food, or fudge, standard-type mix (eggs and water added to dry mix), NS as to icing', and 'Yogurt, plain, nonfat milk'. Each row has a plus sign icon in the first column.

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

22. Type the **Food Item** (or food code) the user is looking for in the **Search** box and press enter.

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

*Note: For helpful hints on using the advance features available in the Food Search, please review that section below.*

23. Use the exclamation point icon (  ) to view food details. Select the plus sign (  ) to add the food item that best represents the food item on the participant's form to the food recall.


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

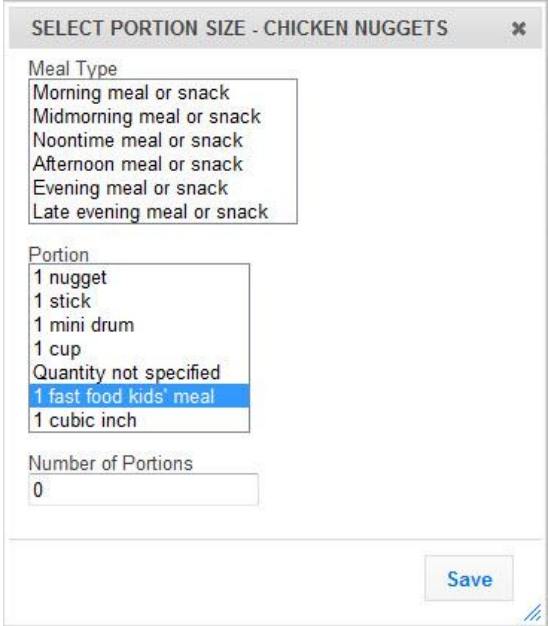
24. Select the **Meal Type**
25. Select the **Portion size** that appropriately reflects the measurement
26. Enter the **Number of Portions**

27. 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 enter key to select to “Save” the data.*

28. Repeat steps 20 – 26 for all food and beverage items to be added

29. Select the **X** button (  ) at the top of the screen or **Done** at the bottom right, after all items have been entered.




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

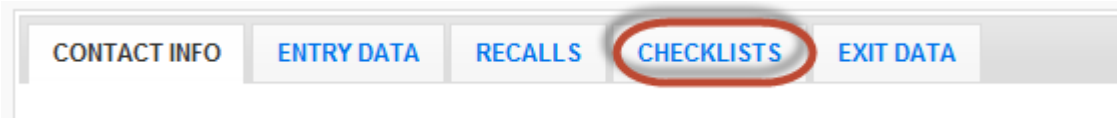
***Note:** There are three functions available in the Edit Foods:*

- Edit food items,
- view food item details, and
- delete food items.

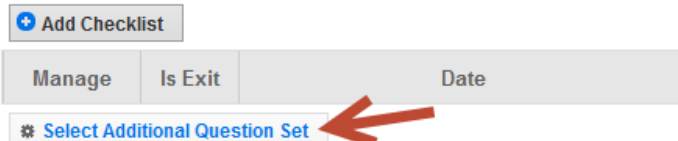
*For more information review Food Search section below.*

30. Select **Save** at the bottom of the screen. This will return you to the Recall tab within the adult record.
31. If desired, select the **Print icon** (  ) under the **Manage** column, to generate the diagnostic reports. See **Reporting** section below for additional information.

32. Select the **CHECKLIST** tab




33. Select **Additional Question Set**, if appropriate



### 34. Select **Add Checklist**


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

### 35. Enter the **Checklist Date**

- manually as MM/DD/YYYY or
- select the Calendar Icon () and choose the correct date

### 36. Enter the value of the responses to the **Ten-Core Questions**

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

3: Smith, Sally  
Checklist Date  
   
☐ Exit Checklist

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

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

**Note:** Additional checklists, if selected, will appear directly below the 10 core questions.

### 38. Select **Save** at the bottom of the screen

### 39. If desired, select the **Report icon** () under the **Manage** column, to generate the diagnostic reports. See **Reporting** section below for additional information.

### 40. Select the **CONTACT INFO** tab

**CONTACT INFO**

ENTRY DATA

RECALLS

CHECKLISTS

EXIT DATA

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

**Note:** If the user receives an error message, the user must correct the address, as appropriate. See **Verify Address** for additional information on this topic.

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

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

**Helpful Hints – Saving Adult Record:**

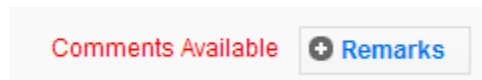
- Records will not save without all required information being entered. See red **Attention Needed** warnings on the **Contact Info** and **Entry Data** screens.
- On initial entry – the **Save** feature will save the record, but leave the user in the record. After the initial save, a second click on **Save** will return the user to the **Manage Adults** screen.

***Note:** this also applies if a user reenters a record to edit it and then clicks save.*

## **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:** If remarks are going to be used at the Region level, the user should note that the 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 tab.*



## **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.

**The Process:**

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 to be edited/viewed
3. Make changes for the adult in the appropriate fields, all required fields are outlined in red.
4. Select **Save** at the bottom of the page.

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

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


5. The user will receive a notification, after saving, as a popup message in the upper right-hand corner, indicating either the save was successful or unsuccessful

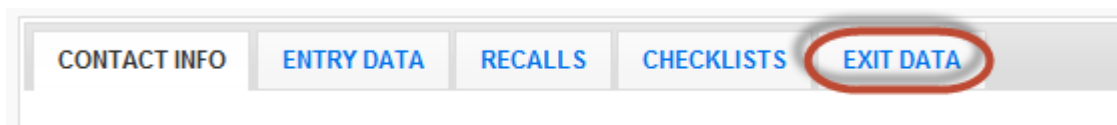
## ***Exiting Adults***

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

**Note:** This process will not be required for adult participants who are entered as a new adult, with a Program Status which is other than Active.

### **The Process:**

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 to be edited/viewed
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 (graduates)
  - b. Select the appropriate exit reason, if the participant did not complete the series (terminated)

**Note:** Options are:

Returned to school	Moved
Took a job	Lost interest
Family Concerns	Other obligations
Staff vacancy	Lost contact with participant

**Note:** Other is also an available option. However, this selection should be used only when none of the other available options are appropriate and as a last result.

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 Contact Hours** - i.e., the total number of hours spent providing direct education to the adult
8. Add any **Public Assistance** the adult is receiving as a result of a referral or suggestion from staff.

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


#### Helpful Hints – Exiting an Adult

1. In order to **Save** the exit information, the user must select an appropriate **Exit Date**
2. The Number of Lessons, Session and Hours should be filled in when the participant is exited from the program for any reason.
3. If the adult is marked as **Educational Objectives Met**, it is advised that the user also make sure the adult has an exit checklist and exit recall.

### ***Deleting Adults***

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

#### The Process:



1. Select **Manage Adults** from the **WebNEERS Home page**, under the **Adults** section
2. Select the **Delete icon** (  ) under the **Manage** column to the left of the adult to be deleted
3. Select **Ok**, when prompted “Are you sure you want to delete this adult?” to delete the adult – or –
4. Select **Cancel**, when prompted “Are you sure you want to delete this adult?” to discontinue the delete operation

**Note:** Once the adult is deleted it cannot be undone.

## Managing Recalls

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

### ***Adding a Recall***

1. Select **Manage Recalls** from the **WebNEERS Home page**, under the **Adults** section  
*Note: The adult participant record must be added before this function will work.*
2. Select the **Wrench icon** () under the **Manage** column to the left of the adult whose recalls is to be managed
3. Select **Add Recall**
4. Enter the **Recall Date**
  - a. manually as MM/DD/YYYY or
  - b. select the Calendar Icon () and choose the correct date
5. Indicate if the participant **Is Pregnant**

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

*Note: this option will not be visible for male participants*

6. Indicate if the participant **Is Nursing**

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

*Note: this option will not be visible for male participants*

7. Indicate if the participant **Taking Nutritional Supplements**
8. Enter the **Amount** of money **Spent on Food Last Month**

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

9. Indicate the **Activity Level**

*Note: Options are:*

Not provided	30-60 minutes
<30 minutes	>60 minutes

10. Select the **FOODS** tab

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

11. Select **Add Food**

**Note:** 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

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

12. Type the **Food Item** (or the food code) the user is looking for in the **Search** box and press enter.

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

**Note:** For helpful hints on using the advance features available in the Food Search, please review that section below.

13. Use the exclamation point icon (!) to view food details. Select the plus sign (+) to add the food item that best represents the food item on the participant's form to the food recall.

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

14. Select the **Meal Type**

15. Select the **Portion size** that appropriately reflects the measurement

16. Enter the **Number of Portions**

**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**

0

17. 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 enter key to select to “Save” the data.

18. Repeat steps 11 –17 for all food and beverage items to be added

19. Select the **X** button (  ) at the top of the screen or **Done** at the bottom right, after all items have been entered.


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

**Note:** There are three functions available in the Edit Foods:




- Edit food items,
- view food item details, and
- delete food items.

For more information review Food Search section below.

20. Select **Save** at the bottom of the screen. This will return you to the View Recalls screen for the adult.

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

### **Food Search popup**

1. Select **Manage Recalls** from the **WebNEERS Home page**, under the **Adults** section
2. Select the **Wrench icon** (  ) to enter the recall you wish to view/edit
3. Click on the **FOODS** tab
4. Select the **Wrench icon** (  ) to edit **Meal Types, Portion Sizes, Number of Portions**
5. Select the **Exclamation Mark icon** (  ) to view food item details, which include:
  - a. **Food Group Data Per 100 gram weight of food**

**Note:** This tab presents 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

- b. **Nutrients Per 100 gram weight of food**

**Note:** This tab presents 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

### c. Weights and Measures



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

Food Code	Name:	
57123000	Cheerios	
FOOD GROUP DATA	NUTRIENTS	WEIGHTS AND MEASURES
Gram Weight	Measure Description	
1	10 Cheerios	
30	1 cup	
21	1 single serving box (.75 oz)	
30	Quantity not specified	

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

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



### Editing a Recall

1. Select **Manage Recalls** from the **WebNEERS Home page**, under the **Adults** section
2. Select the **Wrench icon** (  ) under the **Manage** column to the left of the adult whose recalls is to be managed
3. Edit **Diet Recall Data** or select the **FOODS** tab to add or edit foods. Use 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**
4. Select **Save** at the bottom of the screen to save the edits made to the individual food item(s)
5. Select **Save** at the bottom of the screen to save and exit the recall

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

## Deleting a Recall

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

1. Select **Manage Recalls** from the **WebNEERS Home page**, under the **Adults** section
2. Select the **Wrench icon** (  ) under the **Manage** column to the left of the adult whose recall is to be managed
3. Select the **Delete icon** (  ) to delete the recall
4. Select **Ok**, when prompted “Are you sure you want to delete this recall?” to delete the recall – or – select **Cancel**, when prompted “Are you sure you want to delete this recall?” to discontinue the delete operation

## Search Function – Food items

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

### Levenshtein Distance

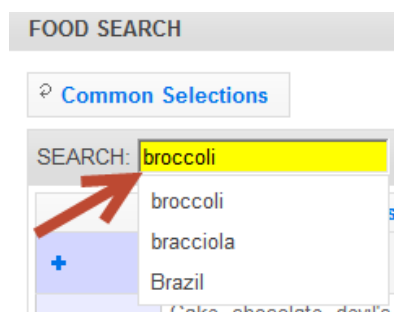
The Levenshtein Distance is a search algorithm that incorporates a more robust approximate string matching algorithm than existed in the previous NEERS system. (for more information: [http://en.wikipedia.org/wiki/Levenshtein\\_distance](http://en.wikipedia.org/wiki/Levenshtein_distance))

#### Overview of the function:

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

Example:

1. The user enters the word “Broccoli”; three (3) suggestions “broccoli, bracciola, and Brazil” will appear
2. The user can then use the arrow keys to select the word that best describes/represents the intended item the user is looking for,
3. Then, after the item is in the search box, the user can hit Enter on his/her keyboard to search for results from the selected/corrected word.



### Automatic fuzzy match

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

## ***Common Selections***

**WebNEERS** automatically provides a list of the foods that are most commonly selected in the user's region and will return the list of the top 50 food, ranked from most to least commonly selected foods.

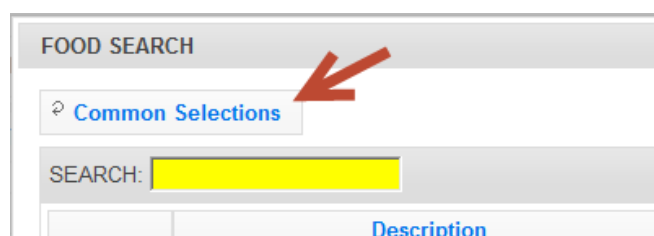
This list will change over time, based on the selections that are being made.

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

**Note:** *If there are multiple users within a particular region, the commonly selected foods will be populated with the results from all users.*

### **Loading the Common Selections**

At anytime, the user may load the common selections by clicking the **Common Selections** tab button the top of the **Food Search** popup.



## **Food Sorting**

The system will automatically return 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.


## **Recall Reports (for use with clients)**

### **Diagnostic Reports Available:**



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

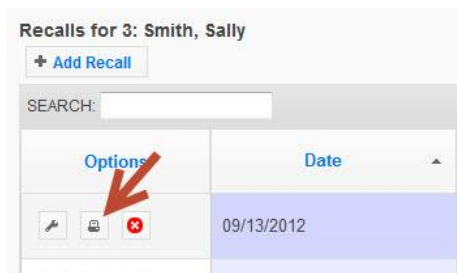
## Accessing Diagnostic Reports

Recall diagnostic reports can be accessed in two ways:

1. From within an **Adult record**, by clicking on the **Recalls** tab and selecting the **Print icon** (  ) in the **Manage** column to the left of the recall for which the recall report is to be generated



2. From the **Manage Recalls** screen, by selecting the **Wrench icon** (  ) to the left of the adult whose recall(s) the user wants to generate the diagnostic report(s) and then selecting the **Print icon** (  ) to the left of the recall for which the report is to be generated



## Managing Checklists

The manage checklist function enables the user to add or review/edit behavior checklist surveys contained within **WebNEERS** without having to access all data entered on the adult participant.


### Adding a Checklist

1. Select **Manage Checklist** from the **WebNEERS Home page**, under the **Adults** section

***Note:** The adult participant record must be added before this function will work.*

2. Select the **Wrench icon** (  ) under the **Manage** column to the left of the adult whose checklist is to be managed

3. Select **Additional Question Set**, if appropriate

4. Select **Add Checklist**
5. Enter the **Checklist Date**
  - a. Type manually - MM/DD/YYYY or
  - b. Select the Calendar Icon () and choose the correct date

6. Indicate **Exit Checklist**, if the checklist being entered reflects the exit.

7. Enter the value of the responses to the **Ten-Core Questions**

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


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

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



***Note:** Additional checklists, if selected, will appear directly below the 10 core questions.*

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

***Note:** To not save the entry, select Cancel*

10. If desired, select the **Report icon** () under the **Manage** column, to generate the diagnostic reports.



### **Editing a Checklist**

1. Select **Manage Checklists** from the **WebNEERS Home page**, under the **Adults** section
2. Select the **Wrench icon** () under the **Manage** column to the left of the adult whose checklists is to be managed
3. Select the **Wrench icon** () to the left of the checklist to be edited
4. Select **Save** at the bottom of the screen to save the edits made to the checklist

***Note:** The user will be returned to the checklists screen for the adult whose record was just being edited.*


## ***Deleting a Checklist***

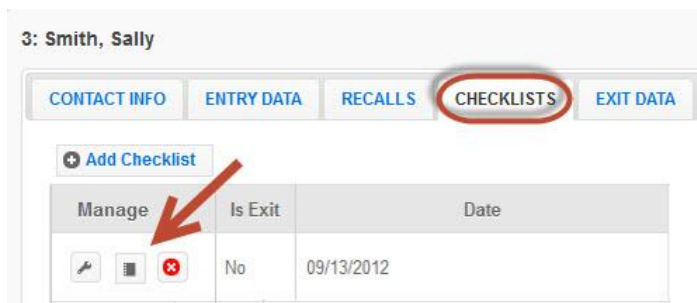
***Note:** Deleting a checklist should only be done if the checklist was entered accidentally. After a checklist has been deleted it cannot be restored.*



1. Select **Manage Checklists** from the **WebNEERS Home page**, under the **Adults** section
2. Select the **Wrench icon** (  ) under the **Manage** column to the left of the adult whose checklists is to be managed
3. Select the **Delete icon** (  ) to delete the checklist
4. Select **Ok**, when prompted “Are you sure you want to delete this checklist?” to delete the checklist – or – select **Cancel**, when prompted “Are you sure you want to delete this checklist?” to discontinue the delete operation

## ***Accessing Diagnostic Report***

The Checklist diagnostic report can be accessed in two ways:

1. From within an **Adult record**, by clicking on the **Checklists** tab and selecting the **Report icon** (  ) in the **Manage** column to the left of the checklist for which the checklist report is to be generated



2. From the **Manage Checklists** screen, by selecting the **Wrench icon** (  ) to the left of the adult whose checklist(s) the user wants to generate the diagnostic report(s) and then selecting the **Report icon** (  ) to the left of the checklist for which the report is to be generated



## Address Verification (EFNEP Only)

The address verification option provides information on program by 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 will be used to create filtered reports at the Institution 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 addresses, 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.

### The Process

The process for verifying 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 has been saved.

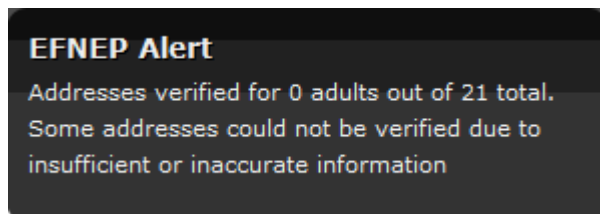
#### Batch Verification

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

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

***Note:** If at any time during the process the user closes the “**Address Verification in Process**” window or selects a new tab or link the process will stop. However, the process can be resumed later by completing the step above.*

#### Screenshot of Batch Verification Alert



## Adult Reports

The adult reports available through **WebNEERS** range from individual diagnostic reports, see **Recall Reports** above, to Region level aggregated data, representing the demographics and output data and through Regional/Institution level outcome data from summary reports. The reports, printed, examined electronically, or when available, exported, are a valuable resource to program managers/nutrition supervisors, as well as frontline staff for use with participants.

#### Hint:


**Reporting Period** dates do not have to be entered to run a report. If dates are not selected, WebNEERS will pull all available data for the current reporting period. It is only necessary to enter dates to view the data for a specific period of time within the reporting period.



## Adult Mailing Labels

Adult Mailing Labels are available at the Regional 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.

#### The Process

1. Select **Adult Mailing Labels** from the **WebNEERS Home page**, under the **Reports** section
2. Select the **Filter** on which the mailing labels should be generated
3. Select the **Label Type** the user would like to print (Avery 5160 and 5164 are listed)
4. Select the **Print Direction**
  - a. Horizontal - This is how labels have printed in previous versions of the NEERS software. 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 alphabetic order
- 6. Enter the **Reporting Period** on which the **Mailing Labels** should be generated - Enter a **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
  - b. **By Staff Member**

***Note:** This option prints labels only for the selected staff member. If this option is selected the user will need to select the **Print icon** () - or - the **Download icon** () to the right of the staff member on which the labels are being requested to get the labels from the next screen to appear.*

- c. **Zip Code** - only generates a list of adults who report a zip code that matches the zip code entered
- 8. Select **Submit** located at the bottom of the screen
- 9. Select the output of the report
  - a. For PDF: Select **Print PDF**

***Note:** The \*.pdf is useful if the user wishes to print the labels directly from a 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 Regional 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 participants. Email addresses should never be shared or distributed to outside sources without prior written consent.


### The Process

1. Select **Adult Email List (CSV)** from the **WebNEERS Home page**, under the **Reports** section
2. Select the **Filter** on which the list should be generated
3. Enter the **Reporting Period** on which the **Email List** should be generated - Enter a **Begin Date** and **End Date**
  - a. Type manually as MM/DD/YYYY or

- b. Select the Calendar Icon () and choose the correct date

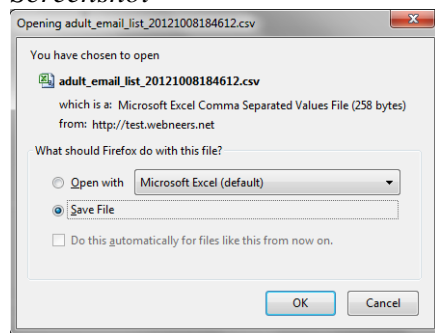
***Note:** If no dates are selected, WebNEERS will pull all available data for the current reporting period. It is only necessary to enter dates if a specific subset of the data is needed.*

4. Select a **Program Status**
  - a. **All** - returns emails for all adults
  - b. **Grads Only** - returns emails for adults whose program status are not “Active”
  - c. **Active Only** - returns emails for adults whose program status is “Active”
5. Enter the **Data Selection**
  - a. **Entire Unit** - print labels for all adults
  - b. **By Staff Member**

***Note:** This option generates an \*.CSV file for the selected staff member. If this option is selected the user will need to select the **Wrench icon** ()*

- c. **Zip Code** - only generates a list of adults who report a zip code that matches the zip code entered
6. Select **Submit** located at the bottom of the screen
7. Select **Ok**, after indicating **Open with** <insert file type> or **Save File** in the popup message.

### Screenshot



8. **Open with** will result in the list of emails being opened with the default spreadsheet software package on the computer. The user will need to choose to save the \*.csv for later use or copy the emails and paste into another software package. – **or** -
9. **Save File** will result in the user being prompted to indicate where the file should be saved for later access. The user will need to note the location the file was saved.

## ***List of Families by Staff Member***

The List of Families by Staff Member Reports are available at the Regional Level. This report can be run as a short version (List of Families) or a detailed version (Detail List of Families). The short version allows a user to see basic information about adult participants per each staff person. The detailed version allows a user to see all pertinent information about adult participant per each staff person.


### ***Hint:***

*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.*

### ***Hint:***

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

## ***The Process***

1. Select **List of Families by Staff Member** from the **WebNEERS Home page**, under the **Reports** section
2. Select the **Filter** on which the list should be generated
3. Enter the **Reporting Period** on which the **List of Families** should be generated - Enter a **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 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 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 adult 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)** - Same as detail list but with personally identifiable information removed
8. Select **Submit** located at the bottom of the screen
9. Select the **Magnifying Glass (Preview) icon** to the right of the staff member on whom the report is to be viewed or printed. 10. To print the report, select the **Print** button at the top of the screen.

### ***Recall List Report***

The Recall List Report is available at the Regional 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.

#### ***The Process***

1. Select **Recall List Report** from the **WebNEERS Home page**, under the **Report** section
2. Select the **Filter** on which the list should be generated
3. Enter the **Reporting Period** on which the **Recall List Report** should be generated - Enter a **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 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 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 exit 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. 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
9. Select the **Magnifying Glass (Preview) icon** to the left of the staff member on whom the report is to be viewed. 10. To download the report, select the **Download PDF** button at the top of the screen.

***Note:** If the report is downloaded, the user will be prompted to select a location into which the file will be saved. The user should note the location for later access.*

### ***Adult Checklist Review***

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

#### **The Process**

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

***Note:** If this option is selected, the user will need to select the **Magnifying Glass (Preview) icon** to the left of the staff member on whom the report is to be viewed.*

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


- 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 exit the program without graduation
7. Select **Submit** located at the bottom of the screen
8. Select the **Magnifying Glass (Preview) icon** to the left of the staff member on whom the report is to be viewed. To print the report, select the **Print** button at the top of the screen.

## **Adult Summary**

The Adult Summary **Report** is available at the Regional and the Institution Level. It provides the aggregated demographic data on all adult participants.

### The Process

#### Regional Level

1. Select **Adult Summary** from the **WebNEERS Home page**, under the **Reports** section
2. Select the **Filter** on which the report should be generated
3. Enter the **Reporting Period** on which the **Adult Summary Report** should be generated - Enter a **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 on whom the report is to be viewed when reaching 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
7. Select the **Magnifying Glass (Preview) icon** to the right of the report to view8. To print the report, select the **Print** button at the top of the screen.


### Institution Level

1. Select **Adult 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 **Regions** to be included in the report

***Note:** A selection is required. To view all reports together, select “Select All”*

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 regional users.*

5. Enter the **Reporting Period** on which the *Adult Summary Report* should be generated - Enter a **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
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 Regional and the Institution Level. It provides the aggregated data and graphics from the adult diet recalls.

### The Process

#### Regional Level

1. Select **Adult Diet Summary** from the *WebNEERS Home page*, under the *Reports* section
2. Select the **Filter** on which the report should be generated

3. Enter the **Reporting Period** on which the *Diet Summary Report* should be generated - Enter a **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 on whom the report is to be viewed when reaching 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
6. Select the **Magnifying Glass (Preview)** icon to the right of the report to view, if step 4, above, was Entire Unit or Zip Code – else, select the **Magnifying Glass (Preview)** icon to the right of the staff person on whom the report is to be viewed
7. Select **Reports & Graphs** to be reviewed/printed
  - a. **Preview Adult Diet Summary Report** – the aggregate of all data reflective of pre and post –education, including those who may have exited with an exit code other than “*Educational Objectives Met*” but from whom a pre and post-recall data are available
  - b. **Graph – Food Group Improvement** – pre and post-education reported food group improvements
  - 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 (whole grain, vegetables, fruit, etc.)
8. To print the report or graphs, select the **Print** button at the top of the screen.


### Institution Level

1. Select **Adult Diet 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 **Regions** to be included in the report

***Note:** A selection is required. To view all reports together, select “Select All”*

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 regional users.*

5. Enter the **Reporting Period** on which the **Adult Summary Report** should be generated - Enter a **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.*


7. Select **Submit** located at the bottom of the screen
8. 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 regional instructions for descriptions of the report and graphics)
9. To print the report or graph, select the **Print** button at the top of the screen.

### **Adult Checklist Summary**

The Adult Checklist Summary Report is available at the Regional and the Institution Level. It provides the aggregated data and graphics from the adult behavior checklists.

### The Process

#### Regional Level

1. Select **Adult Checklist Summary** from the *WebNEERS Home page*, under the **Reports** section
2. Select the **Filter** on which the list should be generated
3. Enter the **Reporting Period** on which the **Adult Checklist Summary Report** should be generated - Enter a **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 on whom the report is to be viewed when reaching 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
6. Select the **Magnifying Glass (Preview) icon** to the right of the report to view, if step 4, above, was Entire Unit or Zip Code – else, select the **Magnifying Glass (Preview) icon** to the right of the staff person on whom the report is to be viewed
7. Select **Reports & Graphs** to be reviewed/printed
  - a. **Preview Adult Checklist Summary Report** – the aggregate of all data reflective of pre and post –education, including those who may have exited with an exit code other than “*Educational Objectives Met*” but from whom a pre and post-checklist data are available
  - b. **Graph –Improved Practices** – pre and post-education reported improved practices on food resource management, nutrition practices, and food safety
  - c. **Graph – Desirable Practices** – reports acceptable practices on pre and post-education on the practices of food resource management, nutrition practices, food safety, and those who reported acceptable practices in all three constructs
8. To print the report or graphs, select the **Print** button at the top of the screen.

**Institution Level**

1. Select **Adult 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 **Regions** to be included in the report

***Note:** A selection is required. To view all reports together, select “Select All”*

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 regional users.*

5. Enter the **Reporting Period** on which the **Adult Summary Report** should be generated - Enter a **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
7. Select the **Magnifying Glass (Preview) icon** to the right of the report to view
8. Select the **Preview Adult Checklist Summary Report button** to view the report or Select the **Graph buttons** to view graphs for Improved Practices or Desirable Practices
9. To print the report, select the **Print** button at the top of the screen.

### ***Subgroups List***

The Subgroup List is available at the Regional and Institutional Level. It can be used to view the list of Federal, Institution and Regional Adult subgroups available to that user.

***Note:** Regional Subgroups can only be viewed by Region Level users*

#### *The Process*

##### *Regional 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

##### *Institution Level*

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

### ***Filter List***

The Filter List is available at the Regional and Institutional Level. It can be used to view the list of Federal, Institution and Regional Adult filters available to that user.

***Note:** Regional Filters can only be viewed by Region Level users*

#### *The Process*

##### *Regional 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 **Print** button at the top of the screen

### *Institution Level*

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

### ***Public Assistance List***

The Public Assistance List is available at the Regional and Institutional Level. It can be used to view the list of Federal, Institution and Regional Adult Public Assistance Programs available to that user.

**Note:** *Regional Public Assistance Programs can only be viewed by Region Level users*

### *The Process*

#### *Regional 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 **Print** button at the top of the screen

#### *Institution Level*

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

## ***Section 6 – Managing Youth; Adding, Editing, and Reporting***

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## Youth Group Section

The Youth Section is used to access, edit and view Youth Group related information. Managing youth groups is only possible as a Regional User.

## 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. The implementation of collecting individual pre-post-education data on youth is being phased in.

## Adding New Youth Groups

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

***Note:** Remember EFNEP and SNAP-Ed data are entered at different https:// pages.*

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

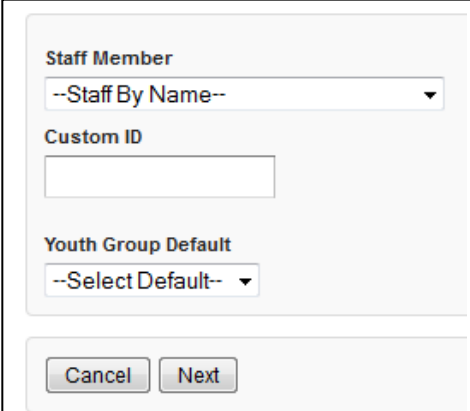
***Note:** If the staff is not listed, select Cancel and see Section 4: Manage Staff for instructions on adding Staff*

### Hint:

*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.*



Staff Member

--Staff By Name--

Custom ID

Youth Group Default

--Select Default--

Cancel Next

6. Select **Youth Group Default** from the list of available defaults or skip to step 6  
*Note: If defaults are not established, but the user would like to establish one/many, see Section 3 – Customizing WebNEERS to meet Region level needs.*
7. Select **Next** to continue creating this youth group, select **Cancel** to exit without saving
8. On the **CONTACT INFORMATION** tab - enter the information from the Youth Group
  - a. 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.*

- b. 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.*

- c. Enter the **Phone Number, Extension** and **Email** address associated with this youth group

*Note: See screenshot below.*

#### Helpful Hints – Contact Information tab:

1. Fields outlined in red are required fields and must be filled in before the record can be saved.
2. Do not **Save** at this point. The record will not save until the **ENTRY DATA** has been added. Clicking save will save all data entered on all tabs on the form so it does not have to be clicked every time a tab is completed.

## Screenshot

New Youth Group

CONTACT INFORMATION LEADERS ENTRY & EXIT DATA DEMOGRAPHICS YOUTH CHECKLIST

Name

Mailing Name

Address

City State Zip Plus 4

Phone Number Phone Ext

Email

Address Verification

County FIPS

Congressional ID CBSA

Longitude Latitude

Data can only be validated after this youth group has been saved

Remarks

**Note:** 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.

### 9. Select **LEADERS** tab

- The primary leader should be preset based upon the user's earlier selection, but it may be changed by selecting a different name from the drop down
- Additional Leaders** may be selected by checking the box to the left of their name

### 10. Select **ENTRY & EXIT DATA** tab

- Enter the **Start Date**
  - Type manually - MM/DD/YYYY format or
  - Select the Calendar Icon (📅) and choose the correct date
- Indicate the appropriate **Program** for this youth group
  - EFNEP
  - SNAP-Ed
  - Other
- Indicate the appropriate **Delivery Mode** for the program (see chart for definitions).

**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.*

<b>Youth Delivery Mode</b>	<b>Definition</b>
<b>E - 4-H Club Membership</b>	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.
<b>F – 4-H Special Interest/Short Term Programs</b>	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.
<b>I – 4-H Camping programs</b>	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).
<b>J – School Enrichment Programs</b>	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.
<b>L – After School Programs</b>	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.
<b>M – Instructional TV/Video/Web Program</b>	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.

d. Select **Subgroups**

***Note:** The user may select as many subgroups as appropriate for the group. There are three potential categories Federal (F), Institution (I), and Region (R). See Section 3: Setup: Customizing WebNEERS to Meet Local Needs for more information on this topic.*

*Helpful Hint:*

If tabbing through the data entry field, the space bar can be used to select/deselect checkboxes

e. Enter the **End Date**

- i. Type manually - MM/DD/YYYY format or
  - ii. Select the Calendar Icon (📅) and choose the correct date
- f. Enter the **Number of Lessons** the youth group completed
- g. Enter the **Number of Sessions** the youth group completed
- h. Enter the total **Number of Hours** spent with the youth group

*Screenshot*

The screenshot shows the 'New Youth Group' form with the 'CONTACT INFORMATION' tab selected. The form includes the following fields and sections:

- Start Date:** A text field with the value '00/00/0000' and a calendar icon.
- End Date:** A text field with the value '00/00/0000' and a calendar icon.
- Program:** A dropdown menu with the value 'A | EFNEP'.
- Delivery:** A dropdown menu with the value '--Select Delivery'.
- Subgroups:** A section with checkboxes for the following categories:
  - ☐ I:August Startup
  - ☐ I:Summer Program
  - ☐ R:Boys and Girls Club
  - ☐ R:Elementary School
- Number of Lessons:** A text field.
- Number of Sessions:** A text field.
- Number of Hours:** A text field.

11. Select the **DEMOGRAPHICS** tab

The screenshot shows the 'New Youth Group' form with the 'DEMOGRAPHICS' tab selected. The tab is highlighted with a red oval. The other tabs are 'CONTACT INFORMATION', 'LEADERS', 'ENTRY & EXIT DATA', and 'YOUTH CHECKLIST'.

*Helpful Hint for the Demographics tab:*

The totals for each category (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.

- a. Enter the **Number of Youth also in 4-H**
- b. Enter the number of **Youth By Gender**
- c. Enter the number of **Youth By Residence**
- d. 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.*

- e. 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

- f. Click on the **Race Subcategories** button and enter the number of participants for each race subcategory, if necessary \*

***\*Note:** Race/Ethnic Subcategories are not required at the Federal level, nor is this information transmitted to the Federal level. This information is optional and in addition to what you have already reported in the boxes above this section.*

## Screenshot

New Youth Group

Remarks

CONTACT INFORMATION

LEADERS

ENTRY & EXIT DATA

DEMOGRAPHICS

YOUTH CHECKLIST

Number of Youth in 4-H

Youth By Gender

Female	0
Male	0
Total	0

Youth By Residence

Farm	0
< 10,000 & Rural	0
10,000-50,000	0
Suburbs > 50,000	0
City > 50,000	0
Total By Residence	0

Youth By Grade

Pre-K	0
K	0
1st Grade	0
2nd Grade	0
3rd Grade	0
4th Grade	0
5th Grade	0
6th Grade	0
7th Grade	0
8th Grade	0
9th Grade	0
10th Grade	0
11th Grade	0
12th Grade	0
Special	0
Total by Grade	0

Total Youth By Race / Ethnicity

		Not Hispanic / Latino	Hispanic or Latino	Not Provided	Total By Race
Only One Race	AI or AN	0	0	0	0
	Asian	0	0	0	0
	Black	0	0	0	0
	NH or OPI	0	0	0	0
	White	0	0	0	0
	Not given	0	0	0	0
Multiple Races	AI or AN and White	0	0	0	0
	Asian and White	0	0	0	0
	Black and White	0	0	0	0
	AI or AN and Black	0	0	0	0
	All Others	0	0	0	0
	Total by Ethnicity	0	0	0	0

Race Subcategories

Total Youth with Subraces

0

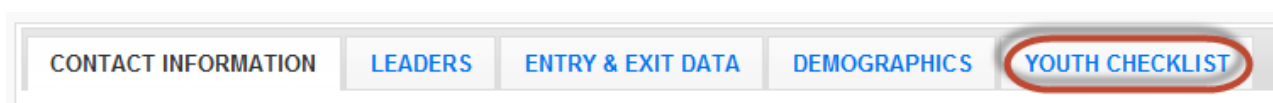
12. Select **Save** at the bottom of the screen

***Note:** If the record has not saved, to this point, do so now. The entry of the individual youth pre- and post-education survey information cannot occur until the record is saved.*

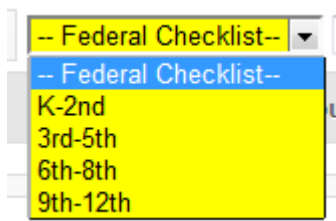
***Note:** If the user selects Save a second time, the youth group will close and the user will be redirected to the Manage Youth Groups screen.*

*If pre- and post-education data are available and to be entered, at the time the youth group is added to WebNEERS, Select Save only once and continue to follow the steps below. Otherwise, select Save twice to exit the youth group for later edit/addition of checklist data.*

13. Select **YOUTH CHECKLIST** tab



14. 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.*

15. Select the appropriate **Institution Checklist**, from the --**Institute Checklist** – dropdown, if required

16. Select **Add Checklist**

a. Enter **Youth Identifier**

***Note:** This must be unique inside of this youth group, and can be either numeric or text based*

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

- 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”*

***Note:** The K-2<sup>nd</sup> Survey must be scored before it is entered. For help, see the Scoring and Data Entry Instructions:*

*<https://www2.ag.purdue.edu/programs/hhs/efnep/Pages/Resource-Evaluation.aspx>*

- e. Enter the value of the responses to the **Additional Questions** for entry and for exit, if appropriate.

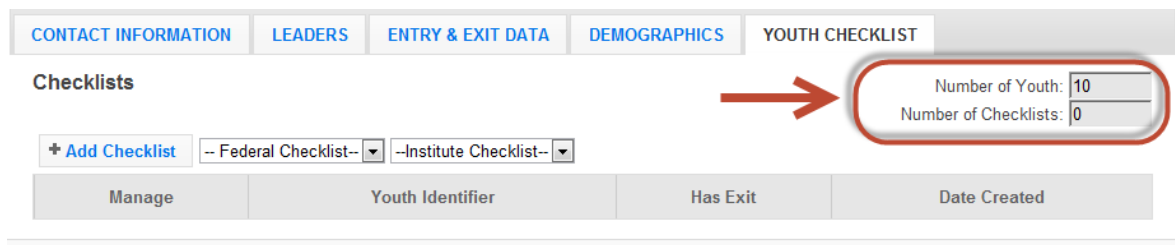
***Note:** Additional checklists, if selected, will appear directly below the federal questions for entry and below the federal questions for exit.*

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

***Note:** To not save the entry, select Cancel*

17. Repeat the steps of 15 for each additional youth survey.

***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 and how many checklists have been added.*

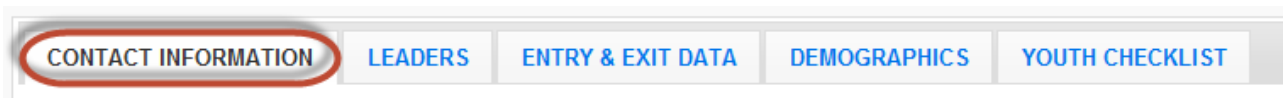


### Helpful Hint

See IRB toolkit for tips on collecting and entering youth data -

<https://www2.ag.purdue.edu/programs/hhs/efnep/Resources/EFNEP%20IRB%20Coordinator%20Toolkit.pdf>

17. Select the **CONTACT INFORMATION** tab



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

***Note:** If the user receives an error message, the user must correct the address, as appropriate. See Verify Address for additional information on this topic.*

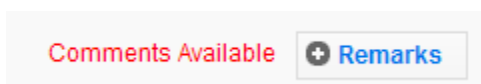
19. Select **Save** at the bottom of the screen

***Note:** At this point, the complete youth group information has been entered into the system and the user 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:** If remarks are going to be used at the Region level, the user should note that the 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 tab.*



### **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.

#### **The Process:**

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 information on the youth group (contact information, demographic characteristics, entry & exit data, checklists)
4. Select **Save** to save the changes to the youth group and return to the manage youth groups page or select **Cancel** to cancel the changes

***Note:** If required fields are not appropriately completed, the form will not save and the focus will be put on 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. The user will receive a notification, after saving, as a popup message 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 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.

#### ***The Process:***

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 return to the list of youth groups

### **Manage Checklists**


The ability to add a checklist 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.

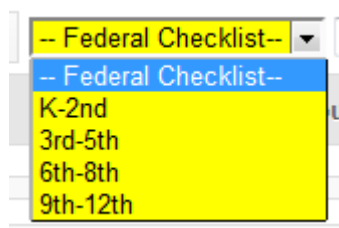
The manage checklist function enables the user to add or review/edit behavior checklist surveys contained within **WebNEERS** without having to access all data entered on the youth group.

### ***Adding a 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**.

#### ***The Process***

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** -- dropdown



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

4. Select the appropriate **Institution** 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**  
***Note:** This must be unique inside of this youth group, and can be either numeric or text based*
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
9. Enter the value of the responses to the **Federal Question Set** for entry and exit.

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

***Note:** The K-2<sup>nd</sup> Survey must be scored before it is entered. For help, see the Scoring and Data Entry Instructions:*



*<https://www2.ag.purdue.edu/programs/hhs/efnep/Pages/Resource-Evaluation.aspx>*

10. 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.*



11. Select **Save** to save the checklist and return to the manage youth checklist page or select **Cancel** to 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, as appropriate
5. Select **Save** to save the checklist and return to the manage youth checklist page or select **Cancel** to 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 to be deleted
4. Select **Ok**, when prompted “Are you sure you want to delete?” to deleting the checklist or select **Cancel** to return to the list of checklists

## Address Verification (EFNEP Only)

The address verification option provides information on program by 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 will be used to create filtered reports at the Institution 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 addresses, it will not prevent the record from saving and moving on with the data.

**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.

### The Process

The process for verifying 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.

#### 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**”.

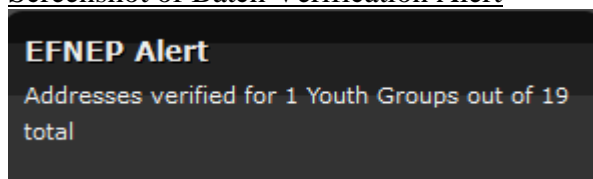


The screenshot shows a web form titled "Address Verification". It contains six input fields arranged in a 3x2 grid: "County", "FIPS", "Congressional District", "CBSA", "Latitude", and "Longitude". Each field is represented by a light gray rectangular box. At the bottom left of the form is a button labeled "Verify Address". A red arrow points from the right side of the form towards this button.

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

***Note:** If at any time during the process the user closes the “**Address Verification in Process**” window or selects a new tab or link the process will stop. However, the process can be resumed later by completing the step above.*

#### Screenshot of Batch Verification Alert



## Youth Group Reports

The reports available through **WebNEERS** range from Region level aggregated data, representing the demographics and output data and through Regional/Institution level outcome data from summary reports are generated. The reports, printed, examined electronically, or when available, exported, are a valuable resource to program managers/nutrition supervisors, as well as frontline staff for use with participants.

#### Hint:

**Reporting Period** dates do not have to be entered to run a report. If dates are not selected, WebNEERS will pull all available data for the current reporting period. 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 Regional 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.

#### The Process

1. Select **Youth Mailing Labels** from the **WebNEERS Home page**, under the **Reports** section
2. Select the **Youth Group Filter** on which the mailing labels should be generated
3. Select the **Label Type** the user would like to print (Avery 5160 and 5164 are listed)
4. Select the **Print Direction**
  - a. Horizontal - This is how labels have printed in previous versions of the NEERS software. 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
7. Select the output of the report
  - a. For PDF: Select **Print PDF**

***Note:** The \*.pdf is useful if the user wishes to print the labels directly from a 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 Regional 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.

### ***The Process***

1. Select **Youth Group Email List (CSV)** from the **WebNEERS Home page**, under the **Reports** section
2. Select the **Youth Group Filter** on which the list should be generated
3. Enter the **Reporting Period** on which the **Email List** should be generated - Enter a **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 **View Report**

***Note:** This option begins the process of downloading a \*.CSV file of the email addresses for the youth groups that are returned for the Filter selected.*

## ***Group Detail Report***

The Group Detail Report is available at the Regional Level. It provides the youth group data for a specific youth group. It is essentially a screenshot of what was entered.


### ***The Process***

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 to be viewed.

## ***Group Names by Leader***

The Group Names by Leader Report is available at the Regional Level. It provides the names and IDs of the groups led by each staff person.

### ***The Process***

1. Select **Group Names by Leader** from the *WebNEERS Home page*, under the **Report** section
2. Enter the **Reporting Period** on which the **Email List** should be generated - Enter a **Begin Date** and **End Date**
  - a. Type manually as MM/DD/YYYY or
  - b. Select the Calendar Icon () and choose the correct date

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

3. Select **Staff Selection**
  - a. For a single staff person: choose the name of the staff from the list
  - b. For all staff: leave the selection —All Staff—

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

4. Select **View Report** to view the report available for the selected staff member(s)
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 Regional Level. It provides a list of the Youth Groups, the group addresses/phone numbers, and the leaders of the groups for a given region.


#### ***The Process***

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 **Preview** to review the list
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 Regional 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.

#### ***The Process***

1. Select **Group Leader Summary** from the *WebNEERS Home page*, under the **Reports** section
2. Enter the **Reporting Period** on which the **Report** should be generated - Enter a **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 the **Staff** on which the report should be generated
5. Select **View Report**
6. 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 Regional 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.

#### ***The Process***

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. **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 on whom the report is to be viewed when reaching step 6.*

3. Enter the **Question Selection**
  - a. **Core Questions** - This will report only on the federal checklists selected for each youth group
  - b. **Additional Questions** - This will report only on the additional checklists selected for each youth group
4. **Privacy** - Check this box to leave out the youth identifiers in this report
5. Select **Submit**

*Note: If Youth Selection was **Entire Unit**, the user will be directed to the checklist review report.*

*Note: If Staff was selected the user will need to select the **Magnifying Glass (Preview) icon** to the left of the staff member on whom the report is generated.*


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

## **Youth Summary**

The Youth Summary Report is available at the Regional and the Institution Level. It provides the aggregated demographic data on all youth groups.

### The Process

#### Regional Level

1. Select **Group Summary** from the **WebNEERS Home page**, under the **Reports** section
2. Select the **Youth Group Filter** on which the report should be generated
3. Enter the **Reporting Period** on which the **Summary Report** should be generated - Enter a **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 the **Continue** to view the report
5. To print the report, select the **Print** button, at the top of the screen.


### Institution 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 **Regions** to be included in the report

***Note:** A selection is required. To view all reports together, select “Select All”*

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 regional users.*

5. Enter the **Reporting Period** on which the **Adult Summary Report** should be generated - Enter a **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 **Continue** located at the bottom of the screen
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 Regional and the Institution Level. It provides the aggregated data from the youth checklists.

### The Process

#### Regional Level

1. Select **Youth Checklist Summary** from the **WebNEERS Home page**, under the **Reports** section
2. Select the **Youth Filter** on which the list should be generated
3. Enter the **Reporting Period** on which the **Email List** should be generated - Enter a **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 **Continue** to view the report
5. To print the report, select the **Print** button, at the top of the screen.


### *Institution 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 **Regions** to be included in the report

*Note: A selection is required. To view all reports together, select “Select All”*

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 regional users.*

5. Enter the **Reporting Period** on which the **Adult Summary Report** should be generated -  
Enter a **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 **Continue** located at the bottom of the screen
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.

### ***Subgroups List***

The Subgroup List is available at the Regional and Institutional Level. It can be used to view the list of Federal, Institution and Regional Youth subgroups available to that user.

*Note: Regional Subgroups can only be viewed by Region Level users*

### *The Process*

1. Regional Level 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

### *Institution Level*

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

### ***Filter List***

The Filter List is available at the Regional and Institutional Level. It can be used to view the list of Federal, Institution and Regional Youth filters available to that user.

**Note:** *Regional Filters can only be viewed by Region Level users*

### *The Process*

#### *Regional 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 **Print** button at the top of the screen

#### *Institution Level*

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

*Section 7 – Annual Report and 5-Year Plan*

**Annual Updates/5-Year Plan .....115**  
    *REGION LEVEL ACCESS TO THE ANNUAL UPDATE/ 5-YEAR PLAN..... 115*  
    *Manage Program Impacts .....115*  
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## ***Annual Updates/5-Year Plan***

This section of the manual is devoted to the successful completion of the Annual Updates/5-Year Plan. This section, at the Federal level, is only required by EFNEP. However, SNAP-Ed can integrate the collection of these data at the Region level to better answer questions which are present on the EARS report.


### **Region Level Access to the Annual Update/5-Year Plan**

Addressed below are the two tabs, **Manage Program Impacts** and **Edit Program Sites and Partnerships**, listed under the heading **Annual Update/5-Year Plan**.

#### ***Manage Program Impacts***

The Manage Program Impacts section of this manual collects the qualitative information (success stories) of the program.

##### *The Process*

1. Select **Manage Program Impacts** from the *WebNEERS Home page*
2. Select **Add Program Impact**, see below
3. Enter a **Title** for the program impact (be specific)
4. 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 not submit the program impact for Institution use
6. Indicate the **Core Area(s)** of the impact

*Note: more than one **Core Area** can be selected.*

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

*Note: more than one **Secondary Area** can be selected*

*Note: Additional Areas can be added by clicking “Add Focus” if the list does not provide an adequate description of the area on which the program impact reflects.*

8. Indicate the **Key Word(s)** that describe the program impact

*Note: Additional Key Words can be added by clicking “Add Keyword” if the list does not provide adequate options.*

9. Indicate the **People** who were involved in facilitating the program impact

*Note: more than one category of “**People**” can be selected*

*Note: Additional People can be added by clicking “Add People” if the list does not provide adequate options.*

10. Type the **Background** of the program impact.

*The background is to: Provide a brief narrative description of the circumstances prior to program involvement and the actions, activities or project milestones that took place during the program that led to the outcomes/impacts. Be clear who is telling the story and include quotation marks where appropriate. **Do not use names or personally identifiable information**. Include any external factors or assumptions that may have influenced the story. (2000 characters or less)*

11. Type the **Outcomes/Impacts**

*The Outcomes/Impacts section is to: Provide a brief narrative description of the direct benefits or indirect/unintended consequences which occurred as a result of participation in the program. As above, be clear who is telling the story and include quotation marks where appropriate. **Do not use names or personally identifiable information**. The description should demonstrate the need for the program and should describe how participation affected those involved. It may reference benefits at the individual, community, or social level. (2000 characters or less)*


12. Select **Save** when the Program Impact has been added.

***Note:** WebNEERS does not “spell check” or “grammar check” – it is recommended that the user type the Background and Outcomes/Impacts into a word processor (such as Microsoft Word) prior to adding to WebNEERS to ensure the submission of a program impact that is complete, accurate, and reflects well upon the Region.*


**Hint:**

Selecting accurate and appropriate Focus Areas, Key Words and People will allow Regional and Institutional 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, 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 have provided the short and medium term outcomes expected in programming.
4. Select **Save** when the review and any necessary edits have been completed

## Screenshot

**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)

## ***Edit Program Delivery Sites and Partnerships***

The Edit Program Sites and Partnerships reports the locations at which programming occurs and the partnerships which are formed in the communities.

### ***The Process***

1. Select **Edit Delivery Sites and Partnerships** from the **WebNEERS Home page**
2. In the first column, enter the total **# of Different Program Delivery Sites/Locations** for the region.

**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 actives 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” will be not be visible at the Institution Level, but they will be aggregated with any other “Other” items added by other regions.*

### ***Hint:***

There is only one Delivery Sites and Partnerships screen per region. This means the data for all regional 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.

## Screenshot

### 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"/>
<a href="#">+ Add Other</a>		

## Section 8 – WebNEERS Troubleshooting

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## ***WebNEERS Troubleshooting and Frequently Asked Questions***

Outlined in this section of the manual are troubleshooting tips and frequently asked questions .

### **Double Entries/A participant entered more than once**

A participant can only be entered into **WebNEERS** once in any given program year.

#### ***Locating and Correcting the error***

1. Select **Manage Adults** at **WebNEERS Home page**
2. Select the double arrows (insert icon) icon in the **Name** column
3. Review the list of names

Identify any names which are repeated

- a. Verify the individuals are unique – or –
- b. Delete one of the duplicate records

See Manage Adults section of this manual for information on deleting an adult.

#### ***Cannot access the data or the database is acting strange***

As **WebNEERS** is a web-based application, access to the Internet is required; **WebNEERS** does not function “off-line.” If the user is unable to access the Internet, the user must contact the SBN (Small Business Network) or local IT staff for assistance.

If Web-NEERS is not functioning correctly and/or error messages appear, type into the provided space, what the user was doing when receiving the error. The **WebNEERS** administrators will address the submitted issues.

#### ***Previous Staff or Volunteers will not delete***

If a previous staff member or volunteer will not delete, it is due to adult participants, youth groups and/or volunteers still being assigned to the staff being deleted. See Manage Staff section of this manual to review the process to **Transfer Responsibilities** of adults or youth groups between staff. If it is volunteers still assigned to the staff, see Manage Staff section of this manual to review the process for generating the Volunteer List report. Once the volunteers have been identified, transfer those volunteers to another staff member.

#### ***Address verification***

*What can I do if the address won't verify?*

1. Remove the street name and house number; then verify with General Delivery
2. Ensure spelling is correct in town name and/or zip code is correct; then verify with General Delivery

*I don't see an Address Verification button, what do I do?*

1. Save the Adult record being worked on
2. Return to the **WebNEERS Home page**
3. Select Manage Adults

4. Select the edit icon next to the adult to be edited
5. Review the Contact Info tab to determine if the address has verified and/or the tab appears.

*How do I know which Addresses have not been verified for my adults?*

1. Select the **List of Families by Staff Member** under the **Report** heading in the Adults section
2. Select **Address Not Verified** Filter
3. Select **Submit** at the bottom of the screen
4. Select the **Preview** icon to the right of the staff's name
5. Review/print the adults listed
6. Repeat step 4 and 5 for each staff member

### ***Client data***

*Data are entered into the wrong program, i.e. EFNEP client in the SNAP-Ed database, what do I need to do?*

You will need to delete the participant from the incorrect database and reenter all the information into the correct database.

### ***Amount of money spent on food***

*What amount should I put in the "amount spent on food"? What all does that include?*

Does the participant receive SNAP Benefits (formerly food stamps)? WIC? Help the participants consider what they spend using these programs, as well as the cash they spend out of their budget. Staff need to work with participants to determine the money that participants spend (or is being spent) for food each month.