

Section 3: Setup: Customizing WebNEERS to Meet Local Needs

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Customizing the System to Meet Local Needs

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

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

Defaults for Adults

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

Example:

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

Defaults for New Adults – Region Level Only

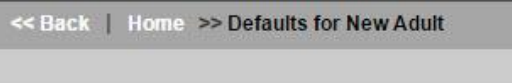
Creating Defaults for New Adults

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

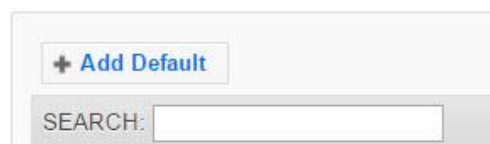


Note:

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



2. Select **Add Default**



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



Note:

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

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

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

Name of Adult Default

Staff

City

State


Zip


Residence Type

Lesson Type

Viewing

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

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

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











<< Back | Home >> Defaults for New Adult

University of Georgia | Fulton | 2013


+ Add Default

SEARCH:


SHOW: All ENTRIES

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

Editing Defaults for New Adults

1. Select **Defaults for New Adults** from the **WebNEERS Home page**, under the **Adults** section
2. Select **Wrench icon** () , under the **Manage** column, located to the left of the default to be edited.
3. Make appropriate changes to the default fields.
4. Select **Save** to save modifications to the default and return to the list or select **Cancel** to return to the list of defaults and return the default to its previous state.

Deleting

1. Select **Defaults for New Adults** from the **WebNEERS Home page**, under the **Adults** section
2. Select **Delete icon** () , under the **Manage** column, located to the left of the default to be deleted.

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

Defaults for New Youth Groups – Region Level Only

Creating Defaults for New Youth Groups

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



Note:

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

2. Select **Add Default**

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

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

- d. **Delivery Mode** – if the delivery mode (e.g., club, camp, etc.) is likely to be known
- e. **Staff Member** – if the staff member is likely to be known
- f. Select Institute and Region **subgroups** likely to apply to the youth group



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

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

Viewing

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




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




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

<< Back Home >> Defaults for Youth Groups			
			University of Georgia DeKalb/Bibb ▾ 2015 ▾
+ Add Default			
SEARCH: <input type="text"/>		SHOW All ▾ ENTRIES	
Manage	Name	City	Zip
 	Upward bound	Macon	31206

Editing Defaults for New Youth Groups

1. Select **Defaults for Youth Groups** from the **WebNEERS Home page**, under the **Youth Groups** section
2. Select **Wrench icon** () , under the **Manage** column, located to the left of the default to be edited.
3. Make appropriate changes to the default fields.
4. Select **Save** to modifications to the default and return to the list or select **Cancel** to return to the list of defaults and return the default to its previous state.

Deleting

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

Subgroups, Filters, and Public Assistance

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

Subgroups

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

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

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



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

Region Level

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



Note:

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

Institute Level

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



Note:

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



Note:

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

Creating Subgroups

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

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

2. Enter a **Name** for the Subgroup (this is the only required field for a subgroup)
3. Enter a **Description** for the subgroup
4. Select **Automatically Create Filter** if you wish to create a corresponding filter for this Subgroup.

Name
Test 1

Description
Description

Filter Generation
 Automatically Create Filter?

Cancel Save

Institute User – Assigning Subgroups to Regions

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

Viewing Subgroups



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

To view only Region Level Subgroups

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

To view only Institute Level Subgroups


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

Subgroup List Report

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

<< Back | Home >> Adult Subgroup List

University of Georgia Chatham 2015

PDF 


Subgroup List Report

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

SEARCH: SHOW All ENTRIES

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

Editing Subgroups

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




Note:

Federal level subgroups cannot be edited. Institute level subgroups can only be edited by Institute level users; Region level subgroups can only be edited by Region level users.

Institute User – Assigning Subgroups to Regions

3. Check or uncheck any regions that need to be added or removed.
4. Select **Save** at the bottom of the screen or select **Cancel** to leave the Subgroup unchanged.

Deleting Subgroups

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



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

Filters

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

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

Note:

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

Region Level

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

Note:

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

Institute Level

1. Select **Adult Filters** or **Youth Filters** under the **Setup** section to display all of the Federal & Institute filters currently available to the user.

Note:

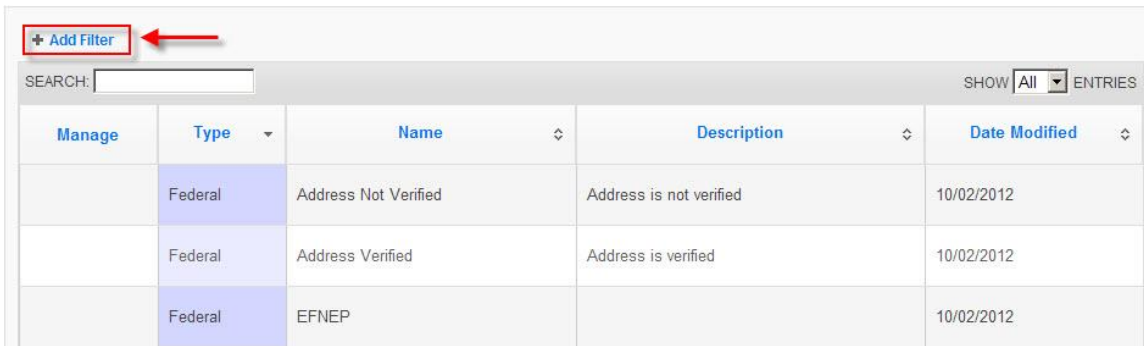
If there are multiple users in an Institute, all filters created, regardless of who created the filter, will be available and listed on this screen.

Note:

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

Creating Filters

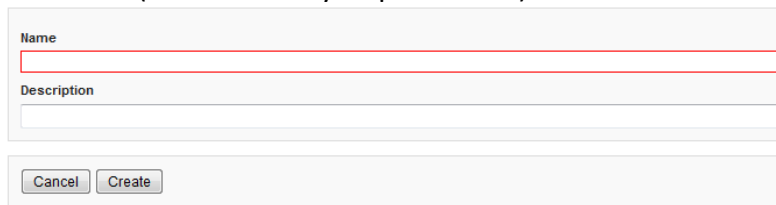
2. Select **Add Filter** on the left of the screen above the table of filters.



The screenshot shows a web interface for managing filters. At the top left, there is a button labeled '+ Add Filter' with a red arrow pointing to it. Below this is a search bar and a 'SHOW All ENTRIES' dropdown. A table lists three filters:

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

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



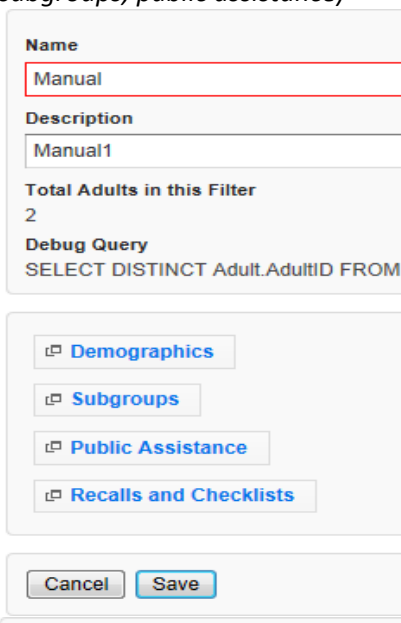
The screenshot shows a form for creating a filter. It has two text input fields: 'Name' and 'Description'. Below the fields are 'Cancel' and 'Create' buttons.

4. Select **Create**



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

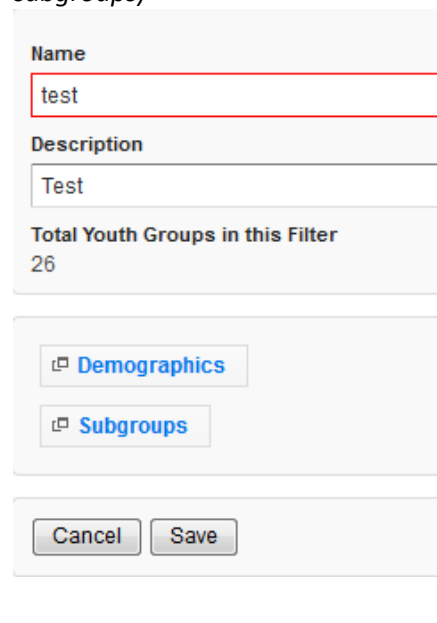
Setup Adults: Example screenshot on which filters can be generated (demographics, subgroups, public assistance)



The screenshot shows the 'Setup Adults' filter configuration form. It includes:

- Name:** Manual
- Description:** Manual1
- Total Adults in this Filter:** 2
- Debug Query:** SELECT DISTINCT Adult.AdultID FROM
- Characteristics:** Demographics, Subgroups, Public Assistance, Recalls and Checklists (all selected)
- Buttons:** Cancel, Save

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



The screenshot shows the 'Setup Youth Groups' filter configuration form. It includes:

- Name:** test
- Description:** Test
- Total Youth Groups in this Filter:** 26
- Characteristics:** Demographics, Subgroups (both selected)
- Buttons:** Cancel, Save

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

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

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

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



Remember that Filters can be created when Subgroups are created. [See Creating Subgroups.](#)

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

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



Note:

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

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

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

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

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

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

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



Note:

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

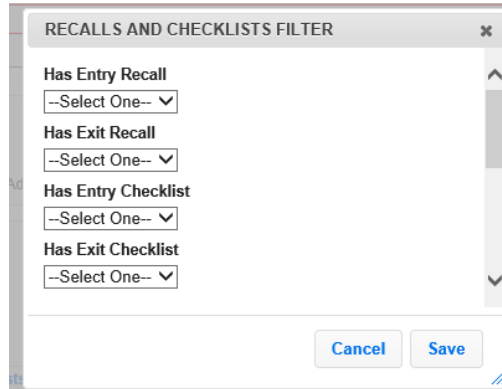


Note:

A public assistance selected in one column cannot be selected in another, but multiple public assistance choices can be selected in the same column.

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

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



Note: *This filter option is not available for Youth Groups.*

Institute User - Assigning Filters to Regions

5. If you are an Institute level user, **check the regions** where you want to release the Filter.
6. Select **Save**, when all characteristics/subgroups/public assistance (for adults)/recall and checklist (for adults) items have been selected.

Viewing Filters



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

To view only Region Level Filters

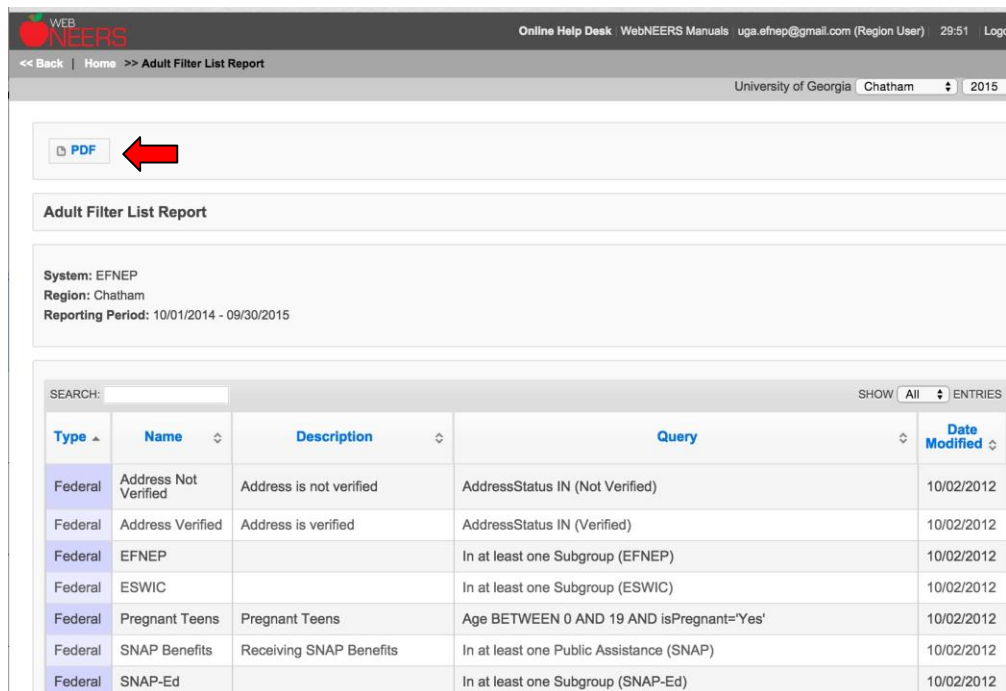
Type the word "Region" into the live search option at the top left of the table. This will filter the results. You can also do this for Institute and Federal level filters.

To view only Institute Level Subgroups

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

Filter List Report


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



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

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

Editing Filters

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

Institute User – Assigning Filters to Regions


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

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

Note:

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

Deleting Filters

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

Note:

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

Public Assistance

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

Region Level

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

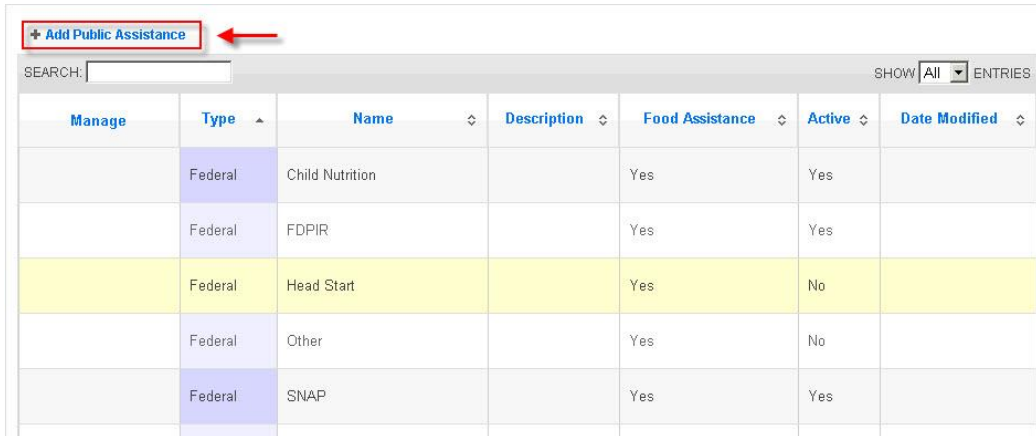
Institute Level

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

Creating Public Assistance:

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

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



The screenshot shows a user interface for adding public assistance. At the top left, there is a button labeled '+ Add Public Assistance' with a red arrow pointing to it. Below the button is a search bar and a 'SHOW' dropdown menu set to 'All'. Below these is a table with the following columns: Manage, Type, Name, Description, Food Assistance, Active, and Date Modified. The table contains five rows of data:

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

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



The screenshot shows the form for adding a new public assistance program. It includes the following fields and options:

- Name:** A text input field with a red asterisk and the text '* This field is required' next to it.
- Description:** A text input field.
- Food Assistance:** A checkbox that is currently unchecked.
- Active:** A checkbox that is currently checked.
- Buttons:** 'Cancel' and 'Save' buttons at the bottom.

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

Institute User – Assigning Public Assistance to Regions

5. If you are an Institute level user, **check the regions** you want the Public Assistance to be available to
6. Select **Save** to save the public assistance and return to the list of public assistance or **Cancel** to return to the list of public assistance.

Viewing Public Assistance



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

To view only Region Level Public Assistance

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

To view only Institute Level Public Assistance

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

Adult Public Assistance List

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

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

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PDF


Public Assistance List Report

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

SEARCH: SHOW All ENTRIES

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

Editing Public Assistance

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




Note:

Federal level public assistance cannot be edited. Institute level public assistance can only be edited by Institute level users; Region level public assistance can only be edited by Region level users.

Institute User – Assigning Public Assistance to Regions

3. Check or uncheck any regions that need to be added or removed.
4. Select **Save** at the bottom of the screen or select **Cancel** to leave the public assistance unchanged.

Deleting Public Assistance

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



Note:

Federal level public assistance cannot be deleted. Institute level public assistance can only be deleted by Institute level users; Region level public assistance can only be deleted by Region level users.

Manage Reporting Dates (optional feature)

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



Tip:



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



Tip:

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

Define Reporting Dates

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



Note:

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

Remove Reporting Dates

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



Note:

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