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

Managing Staff; Adding, Editing, and Reporting

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

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

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

Managing Staff

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

> ### *Classifications of Staff:*
> *Examples of Professional staff are:*
> - Nutrition supervisors
> - Supervising Community Educators
>
> *Examples of Paraprofessional staff are:*
> - Community Educators
> - Nutrition Educators
> - Peer Educators
> - Nutrition Education Assistants delivering content to participants
>
> *Examples of Volunteer staff are:*
> - Persons from the community who assist in programming, who are not paid by EFNEP or Extension funds for their efforts.

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

Staff IDs

Staff IDs can be set in one of two ways:

Automatic ID Creation

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

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

Custom ID Creation

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

Editing a Custom ID

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

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

Screenshot of the Custom ID field is found below.

Custom ID Screenshot

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**.

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

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

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

Professional and Paraprofessional demographics screenshot

PCM: Martinez, Carmen - Paraprofessional

DEMOGRAPHICS   HOURS

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

Last Name

Custom ID (?)

CM

Address

City   **State**   **Zip**

Savannah   GA

Phone   **Ext**

Email

Gender

Female

Ethnicity

Hispanic or Latino

Race

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

Cancel   Save

Volunteer demographics screenshot

V: New Staff   Attention Needed

DEMOGRAPHICS   HOURS

First Name   **Last Name**

Helpful   Hannah

Staff

Staffer, Sally | P

Address

City   **State**   **Zip**

SC

Phone   **Ext**

Email

Sex

Female

Custom ID (?)

Ethnicity

--Select One--

Race

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

Age Code

Adult (18 or older)

Is Current/Former EFNEP Participant (?)

No

Role

--Select One--

Categories

Cancel   Save

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

Volunteer Roles and Duties

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

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

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

- *Non-Agency Volunteers* – Individuals who may or may not have volunteer experience and who want to assist with EFNEP without financial compensation. Non-Agency Volunteer duties may include one or more of the following.
    All of duties listed for Formal Volunteers except Independent teaching
    1. Support service (provide food, space, transportation, and other logistical and infrastructure support)
    2. Recruitment/follow-up (identifies and engages potential participants

and/or continues learning experience beyond program participation)

3. <u>Educational support</u> (assist with in-class and online learning experience – instruction and food demonstrations)
4. <u>Data collection</u> (assist participants with completing data, and then with gathering data, but not data inputting or evaluation)
5. <u>Language and cultural context</u> (facilitate language and cultural understanding)
6. <u>Content development</u> (contribute to content and other resource development and dissemination)
7. <u>Programmatic support</u> (assist in operationalizing program direction in accordance with university/agency priorities).

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

- *Student/Interns* – Individuals who are not paid to support EFNEP, but who want to assist with EFNEP as part of their formal learning experience.
  1. <u>Educational support</u> (assist with in-class and online learning experience – instruction and food demonstrations)
  2. <u>Data collection</u> (assist participants with completing data, and then with gathering data, but not data inputting or evaluation)
  3. <u>Language and cultural context</u> (facilitate language and cultural understanding)
  4. <u>Content development</u> (contribute to content and other resource development and dissemination)
  5. <u>Programmatic support</u> (assist in operationalizing program direction in accordance with university/agency priorities).

Option 1 - Not Entering Hours When Adding Staff

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

Option 2- Entering Hours When Adding Staff

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

P05703: New Staff - Paraprofessional

DEMOGRAPHICS	HOURS	

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

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

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

Viewing or Editing Information for Existing Staff

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

4. View and/or edit the information on the selected staff person.

**Note:**   *All required information is outlined in red.*

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

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

Updating Staff Hours in WebNEERS

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

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

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

Deleting Staff

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

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

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

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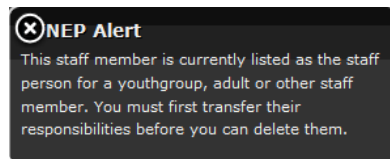
3. Select the **Delete icon (** **).**

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

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

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

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

Reports and Reporting

Staff Mailing Labels

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

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

Note: *If printing Volunteer Labels, select the appropriate Staff Filter.*

3. Select the **Label Type** the user would like to print. (Avery 5160 and 5164 are listed)
4. Select the **Print Direction.**
   a. <u>Horizontal</u> - Staff are placed on labels first left to right and next top to bottom.
   b. <u>Vertical</u> - By selecting this option, staff will print first top to bottom and then left to right. This is useful when the labels being used are perforated in columns and the user would like to take advantage of them while still maintaining the labels in the correct order.
5. Select the **Sort.**
   a. **Zip Code** - sorts by the zip code of the staff member in ascending numeric order.
   b. **Name** - sorts by the last name of the staff member in ascending alphabetic order.
6. Select the output of the report.
   a. For PDF: Select **Print PDF.**

Staff Types
☐ Professional
☐ Paraprofessional
☐ Volunteer
All

Label Types

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

Print Direction
Horizontal ▾

Sort
Zip Code ▾

[Print PDF] [Save as Spreadsheet]

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

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

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

Email List (CSV)

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

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

Status

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

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

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

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

Staff List

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

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

Volunteer List

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

1. Select **Volunteer List** from the *WebNEERS Home page*, under *Reports* in the staff section

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

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

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

> **Tip:** *If **a Staff Member** (step 2 above) is selected - after selecting **Submit**, the user will need to select the Magnifying Glass (Preview) icon ( ) under the **Options** column to view the report.*

Profile Summary Report – Region Level

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

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

Staff Summary Report – Institute Level

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

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

Transfer Responsibilities

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

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

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

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

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

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

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

Browse Staff Data

Browse Staff Summary – Institute Level

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

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

Formal Vounteer Plan – Institute Level

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

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

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

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