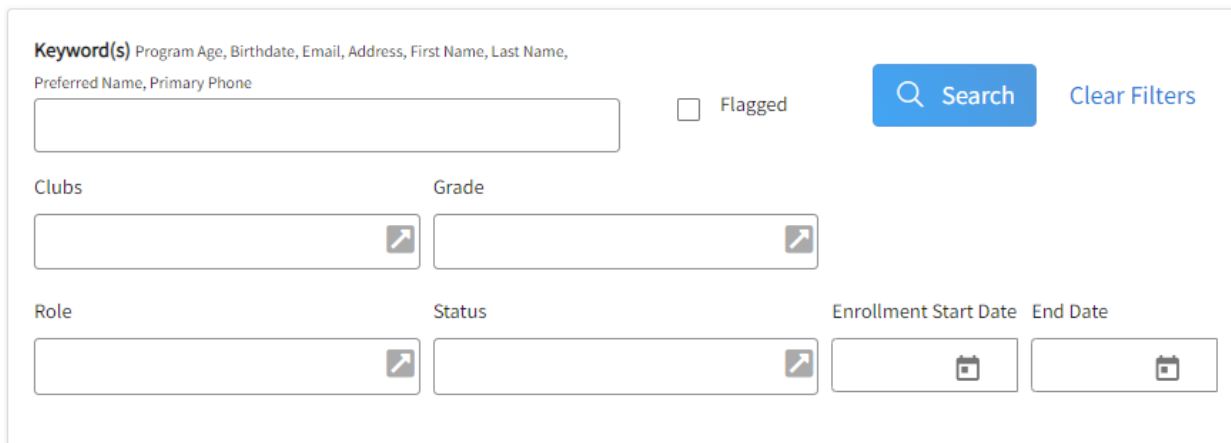## Background

Searching for members is commonly done in Members or Participation. Both search areas are similar, but Members searches across all years while Participation only searches one year. In Members, you can search based on who the member is and their club. Participation allows searching by the member and club, as well as Projects, Groups, Activities, and Awards. You can search for members, view the member status, check on requirements that are not yet met, view the enrollment information and access family and member profiles.

Filters

At the top of the screen are the boxes for the filters available for searching the membership. The Members and Participant filters are similar – everything in the Members Search filters is also in the Participation Search filters.

For the fields with the arrow boxes, you can click on the box and get a drop down to select one option at a time, or you can click on the arrow box and get a pop-up that will let you select multiple options at once. If you do not select any option, then that is the same as all options selected.

They both allow searching by:

- Keywords – Program Age, Birthdate, Email, Address, First Name, Last Name, Preferred Name, Primary Phone
- Flagged – a checkbox that works with the flag to the left of the member in the results list
- Clubs – this will be the list of clubs in the county.
- Grade
- Role – Cloverbud, Club Member, Volunteer
- Status – See the tip sheet titled "Status Definitions" for the full list of options and what they mean.
- Enrollment Start Date and End Date

Additionally, Participation Search allows filtering by:

- Program Year – switch to prior years
- Projects
- Groups
- Activities
- Awards

After setting the filters how you like, click the Search button to apply and see your results. There is the Clear Filters to remove the current filters and start over.

Viewing Results

Once you set your filters and click on the Search button, your results will appear in a list below. Between the filters box and the results are five buttons.

- Broadcast – Allows you to start a Broadcast email to the members in the search results.
- Download Excel – download the search results to an Excel file.
- Health Forms – download health forms for the members in the search results. In both the Member and Participation searches. you have the option to download as Excel or PDF. Additionally in the Member Search, you can download as a Zip file where each health form is a separate PDF or you can download an Audit report (health forms as of a specific date in PDF, XLS, or ZIP format).

- Flag Options (Only on Members Search)
  - Flag All Results – will set the flag on all members in the results.
  - Clear All Flagged Results – will clear the flag on all members in the results but leave the flag of members not in results unchanged.
  - Add Flagged to Activity/Award/Group – add all flagged members (including those not currently shown in the results) to a specified Activity, Award, or Group. See the "Activities and Awards" or "Groups" tipsheets for instructions on using this feature.
- Download Files (Only on Participation Search) – downloads any custom enrollment files for the search results as a Zip file with each member's enrollment files a separate PDF inside that Zip.
- Customize – allows you to pick which fields/columns to display in the results. This does not change what is in the excel download.

There will also be a "Displaying results 1 - # of ##" and navigation buttons. The search results will only show up to 50 at a time. Use the arrow navigation buttons to move.

Member Records

Click on any member name line to enter the member record.

Click on the orange circle with the up arrow in the upper right corner to return to the search menu.

Once in the member record, the left side menu will change to the member menu. These menus are similar between adults and youth, but Hours, Screening, and Volunteering only appears on the Adult menu and Animals only appears on the Youth menu. Clubs and Projects will only appear if a club/project has been added to the enrollment.

Member List – Takes you to the family home screen where you see the list of family members.

Profile – This has member personal information like contact info and emergency contact. The parent/guardian information for youth if here also. You can edit the member's birthdate and the member Subscribe to Emails setting.

Profile notes are at the top of this screen. See the Member and Family Profile Notes tipsheet on how to use profile notes.

At the bottom of this page is where you can move the member to another family. See Moving Members to Another Family tipsheet on how to do this.

Events – any events registered for and a link to sign up for new events.

Enrollment – quick view of the current year's enrollment and a drop down to select previous years.

You can also adjust the number of years in 4-H here by adding years that are not in 4-H Online. See the Adjusting Years In Program tipsheet on how to do this.

About You – demographic data about the member. Information cannot be changed here.

4-H Online 2.0 Member Search

Clubs – Shows what club(s) the member is enrolled in. You can also change the club, but it is best to change these from Enrollments->Approved or Enrollments->Awaiting Review. If you are Swapping one club for another after the enrollment has been submitted, see the Change (Swap) Club Without Losing Projects tipsheet on how to safely do this.

Hours – adults can record volunteer hours throughout the year.

Projects - Shows what project(s) the member is enrolled in. You can also change the projects, but it is best to change these from Enrollments->Approved or Enrollments->Awaiting Review.

Questions – Shows the enrollment questions. The answers cannot be changed here. To change these answers, go to Enrollments->Approved or Enrollments->Awaiting Review.

Screening – Current screening status.

Trainings – Current status of trainings.

Volunteering – volunteer roles selected during enrollment.