

4-H Unit Annual Financial Reporting

System Updates

Financial Reporting Process for 4-H Units

Please note: These screens will present the new format of the online reporting pages.

1. County staff will share the custom password with 4-H unit leaders for their unit.
2. 4-H Clubs will click on “Club Sign-in” button to enter their financial reporting for the completed program year.

The screenshot displays the website for the University of California 4-H Youth Development Program. The header includes the 4-H logo, the program name, and navigation links like 'ENABLE EDITING', 'SKIP TO CONTENT', 'SITE MAP', and a search bar. A banner image shows silhouettes of children with their arms raised. Below the banner is a navigation menu with links: About, Join, Support, Programs, Project Areas, Research, News & Calendar, Resources, and Administration. The left sidebar contains a 'Home' section with links to Administration, State 4-H Office, California 4-H Policies, Advisory Committees, and Financial Reporting (with sub-links for Enter Report, County Office Tools, and State Reports). It also features a 'Find 4-H Clubs Near You!' section with a zip code search and a 'Donate Now' button. The main content area is titled '4-H Unit Annual Financial Reporting' and includes a 'SHARE' button, an 'EMAIL' button, and a 'PRINT' button. It states 'Currently accepting reports for program year: July 1, 2011 - June 30, 2012' and 'Today is August 1, 2012'. There are three sign-in buttons: 'Unit Sign-in' (red), 'County Sign-in' (green), and 'State Sign-in' (blue). An 'Important Dates' table is also present. The table lists key dates and events for the 2011-2012 program year. Below the table, it states 'Reports consist of:' and lists three forms: Form 6.3 Annual Financial Report, Form 6.2 Annual Inventory Report (Mail to County 4-H Office), and Form 8.5 Year-End 4-H Unit Peer Review Report (Mail to County 4-H Office). At the bottom, it provides links for '4-H Annual Financial Reporting Instructions' and 'Chapter 9: Financial Management', and a 'Contact the California State 4-H Office' link. A footer section includes a 'Sign-Up For Email Updates' form with fields for Name and E-mail, and a 'Subscribe' button.

Important Dates	
July 1, 2012	Report Entry by Units for 2011-2012 program year OPENS
September 1, 2012	Unit access to the system for 2011-2012 program year CLOSES
July 1, 2012	County staff collect and review all budgets, inventory reports and audits from all 4-H units and councils
November 1, 2012	County access to the system for 2011-2012 program year CLOSES

Financial Reporting Process for 4-H Units

3. 4-H Unit will choose their County name from the drop down menu.

4. 4-H Unit will click “Choose County”.

The screenshot displays the University of California 4-H Youth Development Program website. The header includes the 4-H logo, the text "University of California 4-H Youth Development Program", and navigation links: "ENABLE EDITING", "SKIP TO CONTENT", "SITE MAP", and a search bar labeled "Enter Search Terms". Below the header is a banner image of silhouettes of people with their arms raised. A navigation menu contains links: "About", "Join", "Support", "Programs", "Project Areas", "Research", "News & Calendar", "Resources", and "Administration".

The main content area is titled "4-H Unit Annual Financial Reporting" and includes links for "SHARE", "EMAIL", and "PRINT". A "Back" link is also present. The "Unit Sign-in" section prompts the user to "First, choose a county." and features a form with a "County" label, a dropdown menu currently showing "Alameda", and a "Choose County" button.

The left sidebar contains a "Home" section with links to "Administration", "State 4-H Office", "California 4-H Policies", "Advisory Committees", "Financial Reporting", "Enter Report", "County Office Tools", and "State Reports". Below this is a "Find 4-H Clubs Near You!" section with a "Zip Code Search" field and a "Search" button. At the bottom of the sidebar is a "Donate Now" button with the text "Secure donations through Network for Good".

The footer includes a "Contact the California State 4-H Office" link, a "Sign-Up For Email Updates" section with "Name:" and "E-mail:" fields and a "Subscribe" button, and a copyright notice: "© 2012 Regents of the University of California | Division of Agriculture and Natural Resources | Nondiscrimination Statement". It also provides links for "Accessibility", "Get PDF Reader", "Get Flash Player", and "Contact Webmaster".

Financial Reporting Process for 4-H Units

5. 4-H Unit will then find their unit name from the drop-down list and select.

6. 4-H Unit will enter their custom password.

7. 4-H Unit then clicks “Sign in”.

The screenshot shows the University of California 4-H Youth Development Program website. The header includes the 4-H logo, the text "University of California 4-H Youth Development Program", and navigation links: "ENABLE EDITING", "SKIP TO CONTENT", "SITE MAP", and a search bar. Below the header is a banner image of silhouettes of people with their arms raised. A navigation menu contains links: "About", "Join", "Support", "Programs", "Project Areas", "Research", "News & Calendar", "Resources", and "Administration".

The main content area is titled "4-H Unit Annual Financial Reporting". It includes a "Back" link and a "Unit Sign-in" section. The sign-in section prompts the user to "Second, choose your unit and enter your password." It contains a form with the following fields:

County	Kern Change County
Unit	Bear Valley 4-H Club
Password	<input type="password"/>
<input type="button" value="Sign in"/>	

Below the sign-in form is a "Donate Now" button with the text "Secure donations through Network for Good". At the bottom, there is a "Contact the California State 4-H Office" link, a "Sign-Up For Email Updates" form with "Name:" and "E-mail:" fields, and a "Subscribe" button. The footer contains the text: "The 4-H name and emblem service marks are protected under 18 U.S.C. 707. Agriculture and Natural Resources, University of California. © 2012 Regents of the University of California | Division of Agriculture and Natural Resources | Nondiscrimination Statement Accessibility | Get PDF Reader | Get Flash Player | Contact Webmaster".

Financial Reporting Process for 4-H Units

8. The information entered on the “Contact Information” tab will be the same content entered on Form 6.3 for Treasurer’s Name, Phone, and email.

9. Click “Save Contact Information”.

10. New contact information will then populate in the box “Current Year Contact Information”.

The screenshot displays the '4-H Unit Annual Financial Reporting' web application. The top navigation bar includes links for About, Join, Support, Programs, Project Areas, Research, News & Calendar, Resources, and Administration. A sidebar on the left contains a 'Home' link and an 'Administration' menu with sub-items: State 4-H Office, California 4-H Policies, Advisory Committees, Financial Reporting (selected), Enter Report, County Office Tools, and State Reports. Below the sidebar is a 'Find 4-H Clubs Near You!' section with a 'Zip Code Search' input and a 'Search' button, followed by a 'Donate Now' button with the text 'Secure donations through Network for Good'. The main content area is titled '4-H Unit Annual Financial Reporting' and shows 'UNIT ACCESS: BEAR VALLEY 4-H CLUB' with a 'Sign out' button. Below this, it indicates 'Kern County' and 'Bear Valley 4-H Club' for the period 'July 1, 2011 - June 30, 2012'. The 'Report Entry' section has tabs for 'Contact Information' (selected), 'Bank Accounts', 'Monthly Activity', 'Inventory', and 'Review/Submit'. The 'Contact Information' tab is divided into two panels: 'Unit Information' and 'Current Year Contact Information'. The 'Unit Information' panel shows 'County: Kern', 'Unit: Bear Valley 4-H Club', and 'EIN: 00-0000000' with a link 'Information inaccurate?'. The 'Current Year Contact Information' panel shows 'None exists for current year.' and 'You may add one below.' Below these panels is a 'Contact Information' section with the instruction 'Enter some contact information for this year:'. It contains three input fields: 'Contact Name' (Required, Minimum Length: 2), 'Contact Phone' (Required, Format: 555-555-5555), and 'Contact Email' (Required, Format: joe@mail.com). A 'Save Contact Information' button is located at the bottom right of this section. The footer includes a link to 'Contact the California State 4-H Office', a 'Sign-Up For Email Updates' section with 'Name:' and 'E-mail:' input fields, and a 'Subscribe' button.

Financial Reporting Process for 4-H Units

11. 4-H Unit will click on the next red tab in the sequence: “Bank Accounts”.

12. 4-H Units that had no open bank accounts at any time during the program year (in this case, 2011-2012) – will click “Report No Open Accounts”.

13. 4-H Units that had any open accounts during the year at any point, will enter the account information under New Bank Account. This information will be taken from Form 6.3.

14. You will enter account information for EACH account you have. Then click “Create New Account”.

The screenshot displays the 'Report Entry' page for 'Kern County' and 'Bear Valley 4-H Club' for the period 'July 1, 2011 - June 30, 2012'. The left sidebar contains a navigation menu with 'Financial Reporting' selected, showing sub-options: 'Enter Report', 'County Office Tools', and 'State Reports'. Below the menu is a 'Find 4-H Clubs Near You!' section with a 'Zip Code Search' input and a 'Search' button. A 'Donate Now' button is also present. The main content area has a red header with tabs: 'Contact Information', 'Bank Accounts' (active), 'Monthly Activity', 'Inventory', and 'Review/Submit'. Under the 'Bank Accounts' tab, there is a section 'Bank Accounts for this Unit' with a message: 'This unit has no recorded open accounts for this time period. You may add one below. If this unit officially has no open accounts for the 2011-2012 program year click this button:'. A button 'Report No Open Accounts' is provided. Below this is the 'New Bank Account' section with a form containing the following fields: 'Bank' (Required, Minimum Length: 2), 'Last 4 Digits of Account Number' (Required, Length: 4), 'Account Type' (Required, dropdown menu with 'Select Account Type'), 'Beginning of Year Balance' (Required, Format: 123456.78), and 'Short Description' (Maximum Length: 20). A 'Create New Account' button is at the bottom right of the form. The footer includes a 'Contact the California State 4-H Office' link and a 'Sign-Up For Email Updates' section with 'Name' and 'E-mail' input fields and a 'Subscribe' button.

Financial Reporting Process for 4-H Units

11. As each account is entered you will see them appear at the top of the screen for bank accounts. 4-H units can edit these accounts if needed. If changes are made to the account, a new entry will appear and you will need to delete the incorrect entry in the bank accounts list.

12. When finished entering all account types, click on the “Monthly Activity” tab from the row at the top.

The screenshot displays the 4-H Financial Reporting interface. On the left is a sidebar with navigation links: California 4-H Policies, Advisory Committees, Financial Reporting (selected), Enter Report, County Office Tools, and State Reports. Below these is a section 'Find 4-H Clubs Near You!' with a Zip Code Search field and a Search button. A 'Donate Now' button is also present. The main content area is titled 'Kern County > Bear Valley 4-H Club > July 1, 2011 - June 30, 2012'. Below this is the 'Report Entry' section with tabs: Contact Information, Bank Accounts (selected), Monthly Activity, Inventory, and Review/Submit. A green success message states 'Success: The account was removed'. Below this is a table titled 'Bank Accounts for this Unit' with columns: Bank, Account Number, Account Type, and Description. The table contains two rows: 'test 2' with account number 1234 and type Savings, and 'test' with account number 5678 and type Checking. Each row has an 'Edit' button. Below the table is a 'New Bank Account' form with fields for Bank (Required, Minimum Length: 2), Last 4 Digits of Account Number (Required, Length: 4), Account Type (Required, dropdown menu), Beginning of Year Balance (Required, Format: 123456.78), and Short Description (Maximum Length: 20). A 'Create New Account' button is at the bottom right of the form. At the very bottom of the page are search options: 'Highlight all' and 'Match case'.

California 4-H Policies
Advisory Committees
Financial Reporting
Enter Report
County Office Tools
State Reports

Find 4-H Clubs Near You!
Zip Code Search
Search

Donate Now
Secure donations through
Network for Good

Kern County > Bear Valley 4-H Club > July 1, 2011 - June 30, 2012

Report Entry

Contact Information Bank Accounts Monthly Activity Inventory Review/Submit

✓ Success: The account was removed

Bank Accounts for this Unit

Bank	Account Number	Account Type	Description
test 2	1234	Savings	Edit
test	5678	Checking	Edit

New Bank Account

Bank
Required
Minimum Length: 2

Last 4 Digits of Account Number
Required
Length: 4

Account Type
Required
Select Account Type

Beginning of Year Balance
Required
Format: 123456.78

Short Description
Maximum Length: 20

Create New Account

Highlight all Match case

Financial Reporting Process for 4-H Units

13. 4-H Units will enter data from Form 6.3 in the Income and Expense fields.
14. PLEASE NOTE: 4-H Units do NOT have to consolidate the account totals as the previous financial reporting required. Each account's Income and Expenses will be entered separately.
15. After the first account's data has been entered, click "Save Data for this Account".
16. Then click the green "Edit" button at the top to enter the financial data for the next account and click Save when done.
17. When account information is successfully saved, a green bar appears at the top of the screen confirming the entry has been saved.
18. Next, click the "Inventory" tab at from the top bar.

Report Entry

Contact Information Bank Accounts Monthly Activity Inventory

Review/Submit

Account	Income	Expenses	Net Income	
test 2 - Savings - 1234	\$0.00	\$0.00	\$0.00	Edit
test - Checking - 5678	\$0.00	\$0.00	\$0.00	Edit

test 2 - Savings - 1234

Account Balance at Start of Program Year: \$1.00

Month	Income <small>Required Format: 123456.78</small>	Expenses <small>Required Format: 123456.78</small>	Net Income <small>(Computed)</small>	Balance <small>(Computed)</small>
July 2011	20	3	17.00	18.00
August 2011	40	5	35.00	53.00
September 2011	15	3	12.00	65.00
October 2011	40	2	38.00	103.00
November 2011	50	5	45.00	148.00
December 2011	45	10	35.00	183.00
January 2012	25	5	20.00	203.00
February 2012	50	2	48.00	251.00
March 2012	0	5	-5.00	246.00
April 2012	30	2	28.00	274.00
May 2012	30	5	25.00	299.00
June 2012	0	2	-2.00	297.00
Yearly Totals <small>(Computed)</small>	345.00	49.00	296.00	297.00

Save Data for this Account

Financial Reporting Process for 4-H Units

19. Information entered on this screen will correspond to the information completed on Form 6.2.

20. 4-H Units may click “Report \$0.00 Inventory Value” or may enter each inventory item, it’s value and quantity. Click Save New Item after each entry.

21. PLEASE NOTE: Inventory Items listed here are only for those with values at or above \$1,500.00. (4-H Units may include on their Form 6.2 items valued at \$100 or more, but only those worth \$1,500 or more are to be reported online.)

22. If Total Value of your inventory item equates to \$1,500, please include. (Example: 3 computers worth \$500 each would meet the \$1,500 value and would be reported.)

23. Click on the red “Review/Submit” tab at the top.

SHARE | EMAIL | PRINT

4-H Unit Annual Financial Reporting

UNIT ACCESS: BEAR VALLEY 4-H CLUB

Sign out

Kern County » Bear Valley 4-H Club » July 1, 2011 - June 30, 2012

Report Entry

Contact Information

Bank Accounts

Monthly Activity

Inventory

Review/Submit

Inventory Items

This unit has not reported any inventory for the 2011-2012 program year.

If this unit officially has an inventory value of \$0.00 for the 2011-2012 program year, click the button below. Otherwise, you may enter any qualifying inventory in the form.

Report \$0.00 Inventory Value

New Inventory Item

Please only enter items or collections of items of value greater or equal to \$1,500.

Item Description <small>Required Format: Description</small>	<input type="text" value="Description"/>
Item Value <small>Required Format: 123456.78 Minimum Value: 1500</small>	<input type="text" value="123456.78"/>
Quantity <small>Required Format: 123456</small>	<input type="text" value="123456"/>
Total Value <small>(Computed)</small>	0.00
<div>Save New Inventory Item</div>	

Contact the California State 4-H Office

For Email Updates: Name: E-mail:

Subscribe

Financial Reporting Process for 4-H Units

24. 4-H Units will then verify on the Review/Submit screen all the information entered for unit financials is correct. Units may edit any information at this time by clicking the green Edit button for the section needed.

25. When all information is correct, click the “Submit Financial Report” button at the bottom of the page.

26. When reports are submitted, 4-H Units may no longer access them.

27. Along with the online financial reporting, 4-H Units must also provide completed Forms 6.3, 6.2, and 8.5 to their County 4-H office staff NO LATER than Sept. 15th. (See Treasurer’s Manual for form templates.)

The screenshot shows the 'UNIT ACCESS: BEAR VALLEY 4-H CLUB' page. The top navigation bar includes links for 'Programs', 'Project Ideas', 'Resources', 'Tools & Calendar', 'Resources', and 'Administrative'. The main content area is titled 'UNIT ACCESS: BEAR VALLEY 4-H CLUB' and shows the reporting period from July 1, 2011, to June 30, 2012. The page is divided into several sections: 'Unit Information', 'Current Year Financial Information', 'Bank Accounts', 'Monthly Activity', and 'Inventory Items'.

Unit Information:

County	Unit	Unit ID	Name	Unit	Phone	Updated
San Diego	Bear Valley 4-H Club	88-0384347	Bear Valley 4-H Club	602-000-0000	02/11/2011, 01:14 PM	

Current Year Financial Information:

Bank	Account Number	Account Type	Description
Bank 1	1234	Savings	
Bank 2	5678	Checking	

Monthly Activity:

Month	Income	Expenses	Net Income
July	400.00	40.00	360.00
August	400.00	40.00	360.00
September	400.00	40.00	360.00
October	400.00	40.00	360.00
November	400.00	40.00	360.00
December	400.00	40.00	360.00
January	400.00	40.00	360.00
February	400.00	40.00	360.00
March	400.00	40.00	360.00
April	400.00	40.00	360.00
May	400.00	40.00	360.00
June	400.00	40.00	360.00
Total	2400.00	240.00	2160.00

Inventory Items:

Month	Income	Expenses	Net Income
July	40.00	40.00	0.00
August	40.00	40.00	0.00
September	40.00	40.00	0.00
October	40.00	40.00	0.00
November	40.00	40.00	0.00
December	40.00	40.00	0.00
January	40.00	40.00	0.00
February	40.00	40.00	0.00
March	40.00	40.00	0.00
April	40.00	40.00	0.00
May	40.00	40.00	0.00
June	40.00	40.00	0.00
Total	240.00	240.00	0.00

Inventory Items:

This unit has reported 'Zero Inventory' for the 2011-2012 program year. If you are not sure if you have inventory, click the 'Inventory' button.

Submit Financial Report