


# **NO FEAR – YEAH 201 Fundamentals**

Presented by Rick Woods at O-E Fall Meeting, September 28, 2019 in Black Mountain, NC

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Slide 1



# NO FEAR – YEAH 201

O-E Rotary Youth Exchange  
September 28, 2019  
Black Mountain, North Carolina

Rick Woods, Presenter

I sent out an email a couple of weeks ago asking you what you would like for me to cover in this session. We have such a diverse level of experience with and knowledge of YEAH and so when I start to think about what to cover in these sessions I don't readily know what will be most beneficial for you – so I asked. And your responses were awesome! Thank you very much for your input.

So just what are we going to cover? (Next Slide)

# NO FEAR – YEAH 201 Fundamentals

## Topics

- System User Detail – who has access to what?

The overwhelming comment in your responses was your desire to get a clearer picture of system user levels of access. Who has access to what? How do they get access? What can they do with their level of access? Why can some people see and edit records and others can't – so I'm going to try to lead you through that today.

# NO FEAR – YEAH 201 Fundamentals

## Topics

- System User Detail – who has access to what?
- Approval Processes – Vol, HF, Students  
NAYEN Trainer courses

Approval Processes – this includes the hows and the whats of getting an “Approved” status for Volunteers and Host Families – and we will include information on the required training courses – how to access, when they are due, how long they are good, etc. And – if we have time after dealing with those two hot topics, (I hope we do) we'll move on to

## NO FEAR – YEAH 201 Fundamentals

### Topics

- System User Detail – who has access to what?
- Approval Processes – Vol, HF, Students  
NAYEN Trainer courses
- Utilities Tab – System Reports, Exports, Club  
Groups, and more

The Utilities Tab – several of the responses and requests I got were to cover the Utilities Tab – now you didn't know that is what you were asking me to cover, but the specific information you requested is found in the Utilities Tab including system reports, exports, how to view applications in process!!!! Fun stuff like that! And then if there is any time left

Slide 5

## NO FEAR – YEAH 201 Fundamentals

### Topics

- IYWT and other Travel Issues
- Student Move-in and End Dates
- Outbound Applications
- Student Reports

I'd like to cover a few things with you that you did not specifically request, but that I have seen as issues.

# NO FEAR – YEAH 201 Fundamentals

## How to Apply

Volunteers - <https://yehub.net/OER-volapp>

Host Families – <https://yehub.net/OER-hfapp>

## Outbound Students

Long Term – <https://yehub.net/OER-obapp>

Short Term – <https://yehub.net/OER-stapp>

But, first – I had a couple of people ask for URL information. Dating back to the early days of YEAH, there are still options in the system to “ADD a Volunteer” or “Add and Host Family” and when you click on one of those options it will tell you “this is no longer necessary – go to this link”

Please remember that the way a volunteer, host family or outbound student gets into the system is by following one the links you see up here and completing an application for the role they wish to play. That is the legitimate way and while the “add a vol” or “add a hf” may still work, it has limited functionality and value and it will cause you much more work to get a complete, usable record.

The only way an Inbound record gets into the system is when a country contact creates the student record and then the student gets a link to go complete their information.

Another thing to remember – students and Host Families NEVER see the HUB or the Portal. They enter information into the system via forms and links, but they cannot see what you see in their record. The system is designed for Rotarian and other approved volunteer’s use, so only volunteers are granted access to the HUB or the Portal or both.

So, please take a photo of these.

# NO FEAR – YEAH 201 Fundamentals

How to Login to YEAH

HUB – <https://yehub.net/OER.php>

Portal – <https://yehub.net/OER-portal>

And just to be clear – if you are trying to access the HUB, here is the URL you should be using

And if you are logging in to the Portal here is the URL you should be using, and then I highly recommend you download the app – then you never have to go back and find this link again. It is on your screen available all the time with the app.



# NO FEAR – YEAH 201 Fundamentals

## Topics

- System User Detail – who has access to what?

So let's start with trying to understand which volunteers have access to what information.

Let me say that one of the great things about the O-E multi-district is that the member districts have a great deal of autonomy. So you at the district level have a say in system user access and how much access you want your volunteers to have – but of course that requires you to know the differences.

The screenshot displays a web-based form for managing volunteer information. At the top, there are five tabs: 'Volunteer Detail' (selected), 'Documents', 'Notes/Alerts', 'Approval Process', and 'System User Detail'. The main content area is titled 'Test Case' in blue. It contains various input fields for personal and contact information, a date of birth field, a photo upload section, and checkboxes for administrative status. At the bottom right, there are 'Edit', 'Save', and 'Exit' buttons.

Field	Value
Last Name	Case
First Name	Test
Middle Name	
Nickname	Test
Date of Birth	07/04/1976
Street Address	121 N. Ferguson Avenue
Address, continued	
City / St / Zip	Cookeville TN 38501
Country	USA
Home Phone	931-999-9999
Cell Phone	931-888-8888
Work Phone	931-123-4567
E-mail Address	rickwoods@charter.net
Title/Position	
District	6780
Club	Cookeville
Club YEO?	<input type="checkbox"/>
Active?	<input checked="" type="checkbox"/>
DOS Exempt?	<input checked="" type="checkbox"/>
Exempt from all Training?	<input checked="" type="checkbox"/>
Include in Directory?	<input type="checkbox"/>
Non-Rotarian?	<input type="checkbox"/>
Key No.	343
Sys User No.	179

This is the record I'm going to use in this presentation to show you some of the differences – Test Case.

This volunteer is associated with the Cookeville club in District 6780. I'm going to go through and show you what Test can see and do with different levels of access

**Test Case**  
**District 6780**

Reply E-mail Address: rickwoods@charter.net

**Filters and User Rights**

Country Group Filter:   
 District Filter: 6780  
 Club Group Filter:   
 Club Filter: Cookeville

YEAH Hub Access? ☒ YEO Portal Web Access? ☒  
 District Officer? ☐ Country Coordinator? ☐ SEVIS Designation:   
 System Admin? ☐ File Manager? ☐ View Secure Documents? ☐  
 View Only? ☐ Password Change Required? ☐ Last Changed: 06/05/2019

Last Hub Login: 09/24/19 09:10  
 Last Portal Login: 09/24/19 09:26  
 Key No: 343  
 Sys User No: 179

Edit Save Exit

Here are the levels of access set for Test Case – You will see that Test has the most restrictive access (except view only) that you can give anyone to YEAH . She has HUB access and Portal access but the access is limited to the filters above. The district filter limits the user to that specific district and the Club Filter will only allow this user to access records related to the Cookeville Club.

**Ohio-Erie Youth Exchange, Inc.**

Test's Program Alerts

Long Term Exchanges Short Term Exchanges Utilities

**Long Term Exchange Program**

Current Inbounds  
 Future Inbounds  
 Past Inbounds  
 Add New Inbound

Current Outbounds  
 Future Outbounds  
 Past Outbounds  
 Add New Outbound  
 Outbound Applicants


Host Families  
 Volunteers  
 Rotary Clubs

Countries  
 Schools



Exit

ROTARY  
**YEAH!**  
 YOUTH EXCHANGE  
 ADMINISTRATION HUB


So when Test logs in to the HUB this is what she sees. You see three tabs at the top – Long Term, Short Term, and Utilities.





## Inbound Students - Current


All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Student Name	Sex	Country	Year	Dist	Host Club	Indicators (click key above for legend)																				
1. Rial Gribaldi, Fedencia	F	Spain	2019-20	6780	Cookeville	<span style="background-color: green;">In</span> <span style="background-color: red;">Out</span> <span style="background-color: yellow;">No</span> <span style="background-color: blue;">Yes</span> <span style="background-color: purple;">On</span> <span style="background-color: brown;">No</span> <span style="background-color: pink;">De</span> <span style="background-color: lightblue;">Ja</span> <span style="background-color: lightgreen;">Fe</span> <span style="background-color: lightyellow;">Ma</span>																				




## Outbound Students - Current

All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Student Name	Sex	Year	Dist	Country	Sponsor Club	Indicators (click key above for legend)																				
1. Nabors, Caleb	M	2019-20	6780	Japan	Cookeville	<span style="background-color: red;">In</span> <span style="background-color: green;">Out</span> <span style="background-color: yellow;">No</span> <span style="background-color: blue;">Yes</span> <span style="background-color: purple;">On</span> <span style="background-color: brown;">No</span> <span style="background-color: pink;">De</span> <span style="background-color: lightblue;">Ja</span> <span style="background-color: lightgreen;">Fe</span> <span style="background-color: lightyellow;">Ma</span>																				



## Host Families

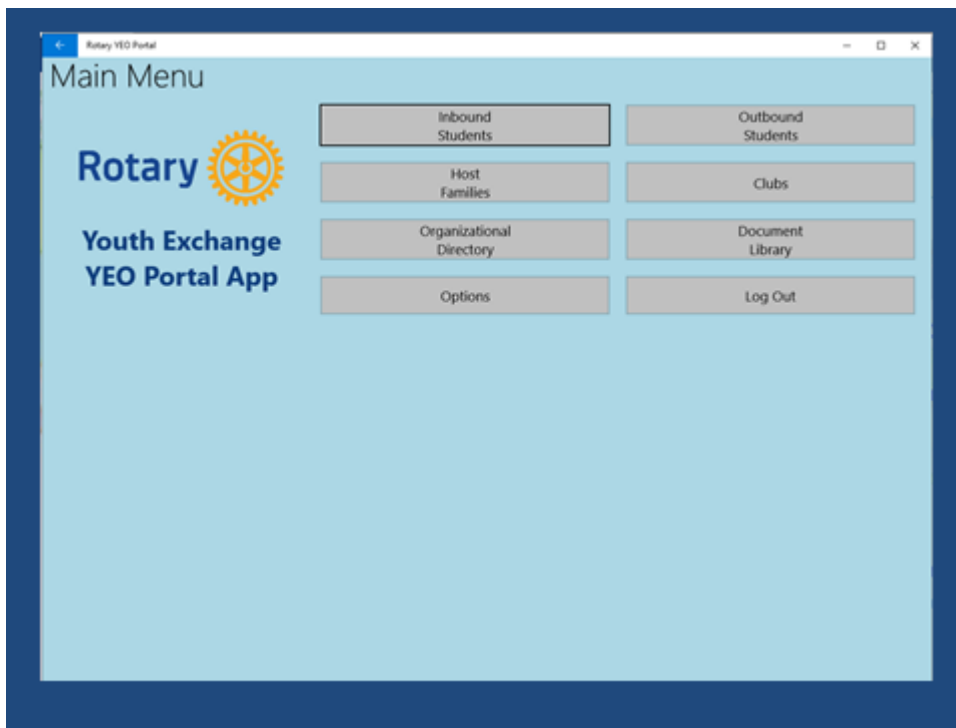


All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Host Family Name	District	City	Status	Appl Recd	Bkg Check	Interview	References	Fol																		
1. Agbunag, Nicole & Arnold	6780	Cookeville	<span style="background-color: green;">Approved</span>	2019-04-20	Current	2019-05-16	Approved																			
2. Coonce, Daniel & Janet	6780	Cookeville	<span style="background-color: green;">Approved</span>	2019-04-03	Current	2019-04-11	Approved	Cu																		
3. McDermott, Tim & Stacie	6780	Cookeville	<span style="background-color: green;">Approved</span>	2019-08-16	Current	2019-09-04	Approved																			

When I click Inbound students I only see one student there – that is the one affiliated with this club – I can double click on her name and open her record see documents, etc. When I click on Outbound Students it is only the Cookeville Club sponsored student that appears in Test’s view of the HUB. Same with Host Families – the three current ACTIVE host families affiliated with the club are the only records I see.



When I go to the Utilities Tab, Test has numerous options available and she can do anything included and available to her in this tab: Send email, generate reports, export data, access the document library, complete a group document upload (but only for the group she has access to and that is those affiliated with the Cookeville Club) – set her user preferences, access and create record subsets and export documents – we will go over some of these later. There are more options in the Utilities tab that do not appear for Test because she has the most restrictive access. You'll see those in a minute.



So what about the portal – When Test logs in to the portal those same filters set in her record apply there too. She will only see those record associated with the Cookeville Club – but this is what it looks like. Inbound students – Outbound students – Host Family (Cookeville) but the Org directory is everybody in O-E whose record is checked with “Include in Directory.” Document Library is all O-E Documents that have been shared with the portal users. The Clubs will be a listing of clubs in that user’s specific district.

You will notice that all those cool features available in the utilities tab are not options and not available in the portal. So the most limited use for any volunteer is to provide access to the portal only with district and club filters set.

So what is the next step up?

Volunteer Detail

Documents

Notes/Alerts

Approval Process

System User Detail

Test Case

District 6780

Reply E-mail Address: rickwoods@charter.net

Filters and User Rights

Country Group Filter:

District Filter: 6780

Club Group Filter:

Club Filter:

YEAH Hub Access? ☒

YEO Portal Web Access? ☒

SEVIS Designation:

District Officer? ☐

Country Coordinator? ☐

View Secure Documents? ☐


System Admin? ☐

File Manager? ☐

Last Changed: 06/05/2019

View Only? ☐

Password Change Required? ☐



Here I have removed the club filter so now Test will be able to access ALL students in district 6780, all host family records and volunteer records in the district and send emails, export data and all those other things in the Utilities tab.

# Inbound Students - Current

All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	
	Student Name		Sex	Country	Year	Dist	Host Club	Indicators (click key above for legend)																			
1	Alonso, Pierre		M	France	2019-20	6780	Oak Ridge Sunset	Se	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja
2	Amarilla Alonso, Erika		F	Brazil	2019-20	6780	Farragut	Se	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja
3	Amato, Domenico		M	Italy	2019-20	6780	Morristown	Se	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja
4	Hou, Sz-Yu (Nico)		F	Taiwan	2019-20	6780	Crossville	Se	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja
5	Kita, Shunsuke		M	Japan	2019-20	6780	Bearden	Se	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja
6	Okoye, Onyedika (Anthonia)		F	Nigeria	2019-20	6780	Oak Ridge	Se	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja
7	Onodera, Yuto		M	Japan	2019-20	6780	Cookeville Breakfast	Se	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja
8	Rial Giribaldi, Federica		F	Spain	2019-20	6780	Cookeville	Se	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja
9	Schroeder, Luisa		F	Germany	2019-20	6780	Sparta	Se	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja	Fe	Mr	Ja

Here's an example of the Inbound students that Test now can see.

I have gotten several emails or calls over the years reporting the inbound chairman or some similar position did not have any inbound students on their screen. Almost always it was because the that volunteer had a club filter on their personal user detail, limiting their access to one club and that club was not hosting a student. Once the club filter was removed – Those district records suddenly appeared.

If we have time later we can talk about Club Groups and some of the other filters – but for now we should move on.

The screenshot shows a web application interface with a blue header bar containing five tabs: 'Volunteer Detail', 'Documents', 'Notes/Alerts', 'Approval Process', and 'System User Detail'. The 'System User Detail' tab is active.

**Test Case**  
**District 6780**

Reply E-mail Address:

**Filters and User Rights**

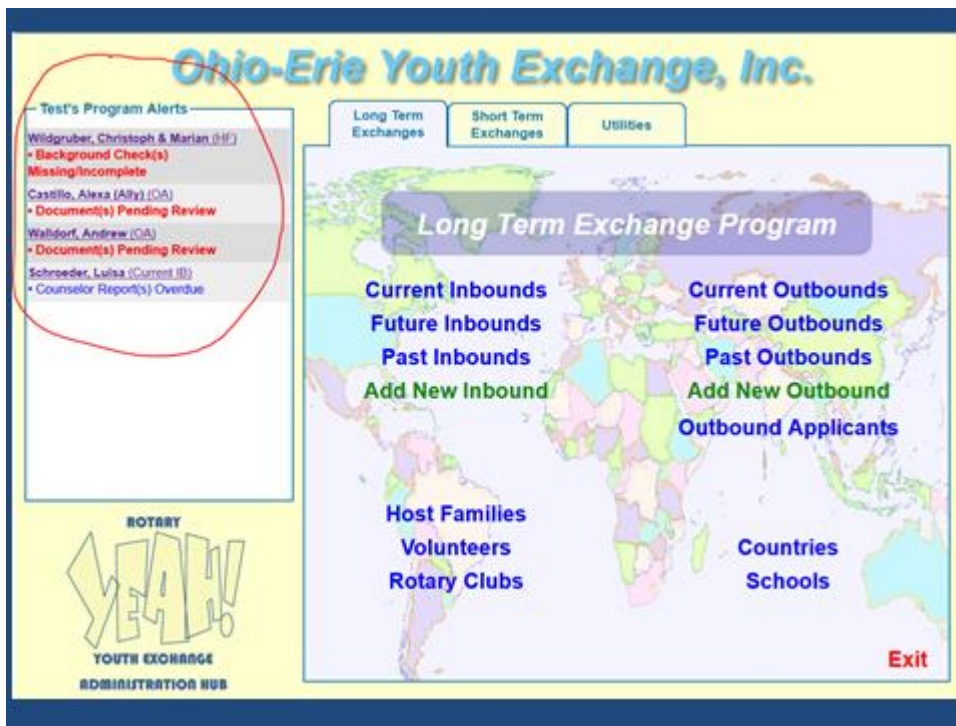
Country Group Filter:   
District Filter:   
Club Group Filter:   
Club Filter:

YEAH Hub Access? ☒ YEO Portal Web Access? ☒  
**District Officer?** ☒ Country Coordinator? ☐ SEVIS Designation:   
System Admin? ☐ File Manager? ☐ View Secure Documents? ☐  
View Only? ☐ Password Change Required? ☐ Last Changed: 06/05/2019

Last Hub Login: 09/25/19 20:43  
Last Portal Login: 09/25/19 21:28  
Key No: 343  
Sys User No: 179

Undo Save Cancel

Now Test has become a District officer and needs a little more access so the District Chair goes in to her record and checks the box that says "District Officer?" What does that get her? She has access to all district records and now begins to see some of the district related alerts.



You will see this looks pretty much like it did before – three tabs at the top – the biggest difference is the district related alerts that show up in the left column. By the way, system administrators are the only people who have access to the magic button to delete any of your Program Alerts. If you see some there that are no longer valid and/or obsolete, please email me with specifics (screenshots are preferred) and I will take care of it for you IF I see it is a legitimate request.

There are more significant difference on the utilities tab and within these records – for example let's look at Volunteers

# Volunteers

All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Volunteer Name	District	D Ofc	H/F?	Club	Status	Access	Appl Recd	Blg Check	DOS Cert	You																
1. Alexander, Cory	6780			Bearden	Approved	WEB	2019-04-04	2019-04-06	2019-04-19	2																
2. Alutais, Barges	6780			Cookeville Breakfast	Approved	WEB	2019-03-20	2019-03-25	2019-03-22	2																
3. Asher, Naomi	6780			Oak Ridge	Approved	WEB	2019-05-22	2019-05-23	2019-05-22	2																
4. Baldus, Don	6780			Morristown	Incomplete		2019-05-21	2019-06-19																		
5. Binnhall, Conrad	6780			Morristown	Approved	WEB	2019-04-11	2019-04-16	2019-04-12	2																
6. Case, Test	6780			Cookeville	Approved	HUB/WEB	2019-04-04	2019-04-04	EXEMPT																	
7. Cheney, John	6780			Mt. Juliet	Approved	HUB/WEB	2019-02-17	2019-06-25	2019-02-24	2																
8. Christian, Shelly	6780			Cookeville	Approved	WEB	2019-04-15	2019-06-13	2019-05-17	2																
9. Coronado, Sabina	6780			Crossville	Approved		2019-05-14	2019-07-03	2019-06-19	2																
10. Crowder, Jake	6780			Sparta	Approved	WEB	2019-03-29	2019-04-03	2019-04-15	2																
11. Cunningham, Adam	6780			Cookeville Breakfast	Approved	WEB	2019-03-19	2019-04-02	2019-04-02	2																
12. Downs, John	6780			Sparta	Approved	HUB/WEB	2019-06-26	2019-07-01	2019-07-15	2																
13. Fare, Donna	6780			Sparta	Approved	WEB	2019-03-24	2019-03-27	2019-03-31	2																
14. Gernish-Abouelata, Kriston	6780			Farragut	Approved	WEB	2017-07-10	2019-07-18	2019-07-25	2																
15. Gregor, Elizabeth	6780			Knoxville	Approved		2019-06-22	2019-03-07	EXEMPT	2																
16. Hughes, Frank	6780			Chattanooga	Approved	HUB/WEB	2018-08-27	2019-03-25	2018-12-01	2																
17. Ingle, Margaretanne	6780			Oak Ridge Sunset	Approved	WEB	2019-04-14	2019-04-11	2019-04-11	2																
18. Kraus, Cindy	6780			Farragut	Approved	WEB	2019-04-14	2019-04-16	2019-05-06	2																
19. Kuipers, Devin	6780			Oak Ridge Sunset	Approved	WEB	2019-04-09	2019-04-10	2019-04-09	2																
20. Melcher, Janice	6780			Oak Ridge	Approved	HUB/WEB	2017-06-01	2019-07-09	2019-03-11	2																
21. Moses, Rachel	6780			Cookeville Breakfast	Approved	HUB/WEB	2018-05-18	2019-02-14	2019-07-22	2																
22. Nichols, Bill	6780			Farragut	Approved	HUB/WEB	2018-05-18	2019-03-25	2019-07-18	2																
23. Rankin, Brent	6780			Oak Ridge	Approved	WEB	2019-03-20	2019-03-22	2019-03-25	2																

View 1 - 28 of 28

Detail

Show All Volunteers

Exit

When I click on Volunteers I see the list of active volunteers in my district (do you know how to see the inactive volunteers? – click on the filter icon top right and uncheck the box that says “Active only”). Let’s open Cory Alexander’s record.

The image displays two screenshots of a web application interface for viewing a volunteer's record. The top screenshot shows the 'Volunteer Detail' view, which includes tabs for 'Documents', 'Notes/Alerts', and 'Approval Process'. The record for Cory Alexander is shown with fields for Last Name (Alexander), First Name (Matthew), Middle Name (Cory), Nickname (Cory), and Date of Birth (09/01/1976). The bottom screenshot shows the same record but with an additional 'System User Detail' tab highlighted by a red circle, indicating that this view is only accessible after being added as a District Officer.

**Volunteer Detail** | Documents | Notes/Alerts | Approval Process

**Cory Alexander**

Last Name: Alexander Suffix:

First Name: Matthew

Middle Name: Cory

Nickname: Cory Date of Birth: 09/01/1976

Test's view of this record without being a District Officer.

**Volunteer Detail** | Documents | Notes/Alerts | Approval Process | **System User Detail**

**Cory Alexander**

Last Name: Alexander Suffix:

First Name: Matthew

Middle Name: Cory

Nickname: Cory Date of Birth: 09/01/1976

Test's view of this record after being added as a District Officer.

I've given you the top half of his detail screen as a comparison of what I, as Test Case, could see before I was a district officer (the section on top), and now what I can see as a district officer (the section on the bottom). Now I, as a district officer, can go into Cory's record and make some, not all, changes to his access level. So – only district officers can change some of those filters. Which ones?

**Volunteer Detail** | **Documents** | **Notes/Alerts** | **Approval Process** | **System User Detail**

**Cory Alexander**  
District 6780

Reply E-mail Address:

**Filters and User Rights**

Country Group Filter:   
 District Filter:   
 Club Group Filter:   
 Club Filter:

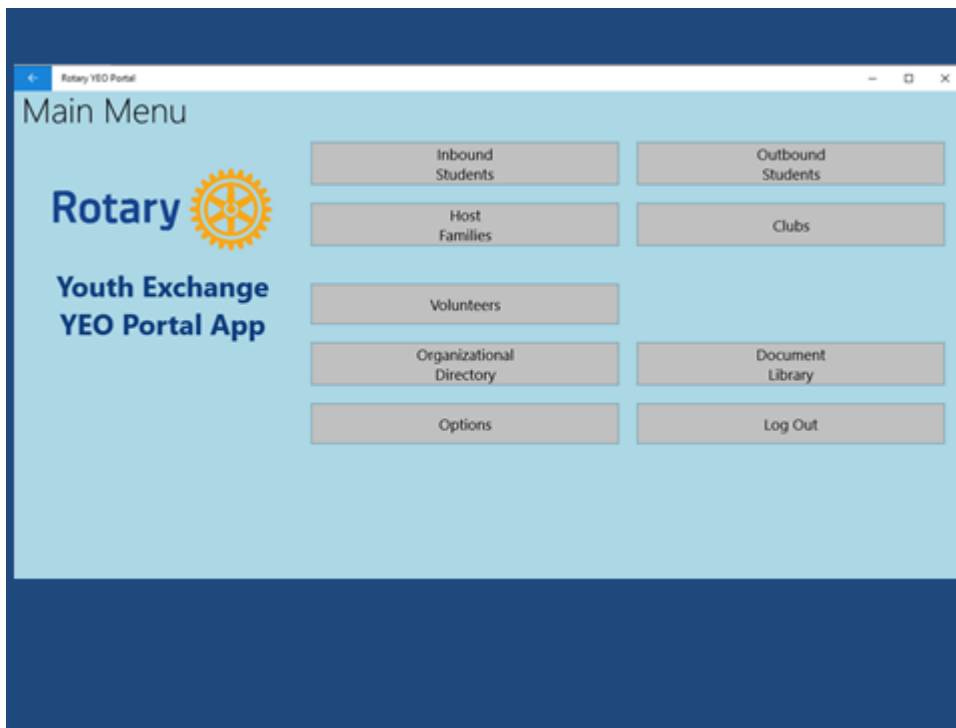
☒ YEAH Hub Access?    ☒ YEO Portal Web Access?  
☒ District Officer?    ☐ Country Coordinator?  
☐ System Admin?    ☐ File Manager?  
☒ View Only?    ☒ Password Change Required?  
 SEVIS Designation:   
 View Secure Documents? ☐  
 Last Changed: 09/03/2019

Last Hub Login: MM/DD/YY hh:mm  
 Last Portal Login: 09/03/19 14:38  
 Key No. 1070  
 Sys User No. 692

Undo Save Cancel

Those that I have highlighted here. Club Group Filter, Club Filter – notice Test Case cannot change Cory's district. As a district officer, Test Case can give Cory Hub Access, can make him a district officer, can limit him to view only, but she cannot make him a country coordinator (contact), a File Manager, or give him permission to view secure documents. It takes an even higher level of access to give a volunteer country coordinator and file manager and secure documents status – but district officers can access and manage some of the user rights.

Does anything change in the Portal for a Volunteer who is a District Officer? I'm glad you asked.



You see here in the middle of the screen a Volunteers option which was not there for the non-district officer.

If Test Case clicks on Volunteers she will see all of the Volunteers in the district – their club affiliation, their city, their YEAH status, and the dates when their background check expires.

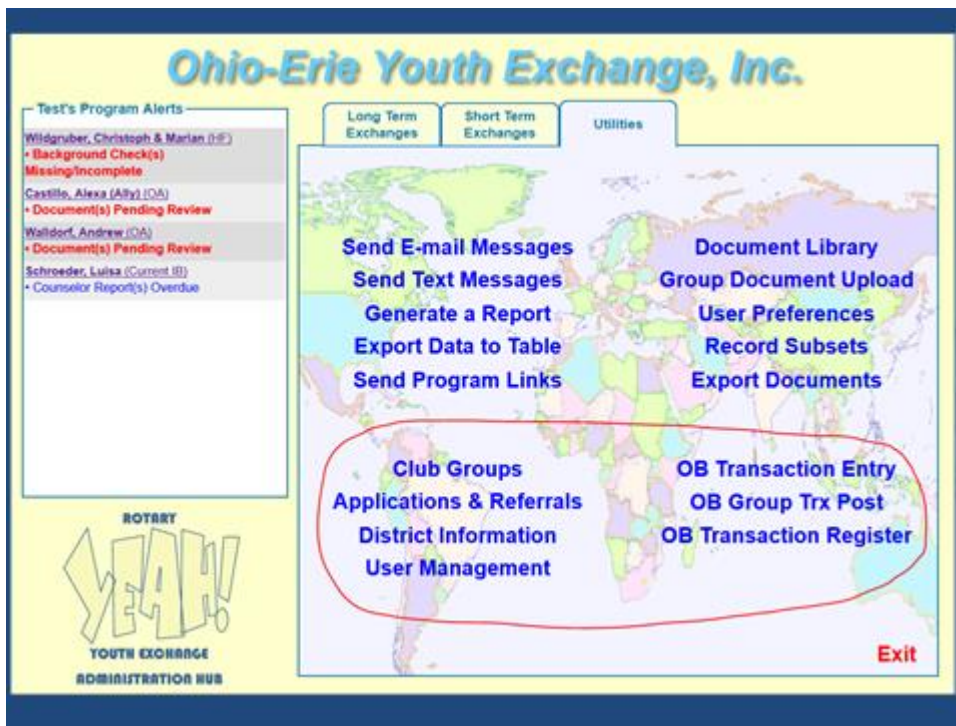
Rotary YEO Portal

## Volunteers

Filters:

Name	Club	Status	Next Renewal	Big Chk Expires	City
Cory Alexander	Bearden	Approved	07-Apr-2020	07-Apr-2020	Knoxville
Barjes Alotaibi	Cookeville Breakfast	Approved	21-Mar-2020	24-Mar-2020	Cookeville
Naomi Asher	Oak Ridge	Approved	21-May-2020	22-May-2020	Oak Ridge
Don Baldus	Morristown	Incomplete	18-Jun-2020	18-Jun-2020	Bean Station
Conrad Brimhall	Morristown	Approved	11-Apr-2020	15-Apr-2020	Morristown
Test Case	Cookeville	Approved	03-Apr-2020	03-Apr-2020	Cookeville
John Cheney	Mt. Juliet	Approved	24-Feb-2020	24-Jun-2020	Mount Juliet
Shelly Christian	Cookeville	Approved	14-Apr-2020	12-Jun-2020	Cookeville
Sabina Coronado	Crossville	Approved	18-Jun-2020	02-Jul-2020	Crossville
Jake Crowder	Sparta	Approved	02-Apr-2020	02-Apr-2020	Cookeville
Adam Cunningham	Cookeville Breakfast	Approved	25-Mar-2020	01-Apr-2020	Cookeville
John Downs	Sparta	Approved	05-May-2020	30-Jun-2020	Sparta
Donna Fane	Sparta	Approved	26-Mar-2020	26-Mar-2020	Sparta
Kristin Gerrish-Abouelata	Farragut	Approved	28-May-2020	17-Jul-2020	Knoxville
Elizabeth Gregor	Knoxville	Approved	06-Mar-2020	06-Mar-2020	Knoxville
Frank Hughes	Chattanooga	Approved	01-Dec-2019	24-Mar-2020	Lookout Mountain
Margaretanne Ingle	Oak Ridge Sunset	Approved	10-Apr-2020	10-Apr-2020	Knoxville
Cindy Kous	Farragut	Approved	15-Apr-2020	15-Apr-2020	Knoxville
Devlin Kuipers	Oak Ridge Sunset	Approved	08-Apr-2020	09-Apr-2020	Hartman
Janice Melcher	Oak Ridge	Approved	10-Mar-2020	08-Jul-2020	Oak Ridge
Rachel Moses	Cookeville Breakfast	Approved	14-Feb-2020	14-Feb-2020	Cookeville
Bill Nichols	Farragut	Approved	24-Mar-2020	24-Mar-2020	Knoxville

Of course, I could click on any one of those names and open that record, but I cannot make any changes to these volunteer records in the Portal. Remember, the portal does not have the same capabilities for interaction that the HUB has. All of the interaction in the portal comes by way of access bars at the bottom of the individual record and they typically take you to a form. You don't change any records in the Portal.



I mentioned earlier that there were significant changes in the Utilities Tab once a volunteer has District Officer credentials. Here you see the entire bottom half of the screen is filled with action options and some of those on the left - applications and referrals for example – are quite important for some district officer(s). I'll cover those more thoroughly later when we talk about Utilities Tab and Approval Processes. So we'll come back to that.

Volunteer Detail

Documents

Notes/Alerts


Approval Process

System User Detail

Test Case

District 6780

Reply E-mail Address: rickwoods@charter.net



Filters and User Rights

Country Group Filter:

District Filter: 6780

Club Group Filter:

Club Filter:

YEAH Hub Access? ☒

YEO Portal Web Access? ☒

District Officer? ☒

Country Coordinator? ☐

System Admin? ☐

View Only? ☐

File Manager? ☒

View Secure Documents? ☐

SEVIS Designation:

Last Changed: 06/05/2019

Password Change Required? ☐

Last Hub Login: 09/26/19 14:50

Last Portal Login: 09/26/19 09:17

Key No: 343

Sys User No: 179

Edit

Save

Exit

File Manager status. Only administrators can check the box for a user to become a file manager. Who needs to be a file manager? I think it needs to be only District General Chairs and Country Contacts. Here's is what you get when you have File Manager Access.



You get an additional tab on your general login screen – that tab is Reference Files. What’s the mystery behind Reference Files? Well, it’s not a mystery, but once you are in there you can – with all good intentions – change or modify some things that affect the entire multi-district, not just your district – so it should be limited. Here is what is available in the Reference Files Tab.



These are all items that are not used by the average club counselor, district committee member, even district officers and what's more, if someone goes in and changes country groups or message templates then it changes things for everyone who uses the system. Please allow me as the YEAH Administrator to work with you on any of these issues that you see here.

The biggest reason the general chair of the district should have File Manager access is to be able to assign the individual or individuals who should have Secure Document access.

**Test Case**  
**District 6780**

Reply E-mail Address:

**Filters and User Rights**

Country Group Filter:   
District Filter:   
Club Group Filter:   
Club Filter:

YEAH Hub Access? ☒ YEO Portal Web Access? ☒  
District Officer? ☒ Country Coordinator? ☐ SEVIS Designation:   
System Admin? ☐ File Manager? ☐ **View Secure Documents?** ☒  
View Only? ☐ Password Change Required? ☐ Last Changed: 06/05/2019

Last Hub Login: 09/26/19 14:50  
Last Portal Login: 09/26/19 16:01  
Key No: 343  
Sys User No: 179

District General Chairs, Outbound Chairs, country contacts and whoever in your district is doing Criminal Background Checks, needs to have access to Secure Documents. Only a district officer with File Manager status can grant permission to access Secure documents, so that is usually the general chair in the district. What are secure documents?

## Document Types

	Document Type	Description	IB	OB	HF	Vol	Ptnr	Secure
1	Additional Vetting	HF Family Checklist, Reference Check, i	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Background Check	Copy of completed Background Check	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3	Counselor Report	Monthly report by host club counselor	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Country Requirements	Detailed requirements for exchange pa	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5	Country Selection Form	Outbound applicant's Country Selectio	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	D&C Profile	District & Club Profile completed by ho	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
35	OB Club Endorsement	Sponsor Club Endorsement Form for c	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
36	OB Country Info & Exp	Country Information and Expenses for	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
37	OB Dental Report	Dental Report for Outbound Applicants	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
38	OB Guarantee Form	Completed Guarantee Form from the h	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
43	OB Insurance Waiver		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
44	OB Medical Report	Medical Report for Outbound Applicant	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
45	OB School Reference	Confidential School Reference form	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
60	School Transcript	School Transcript	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
61	Student Report	Periodic reports submitted by students	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
62	Travel Authorization	Travel Authorization Form for inbound	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Here are the four document types we currently have listed as "Secure Documents". Criminal Background Check – OB applicant Dental Report – OB applicant Medical Report – and Student monthly reports (although, I'm not confident that is working as it is designed to work).

**Test Case**  
**District 6780**

Reply E-mail Address:

**Filters and User Rights**

Country Group Filter:   
 District Filter:   
 Club Group Filter:   
 Club Filter:

YEAH Hub Access? ☒ YEO Portal Web Access? ☒  
 District Officer? ☒ **Country Coordinator?** ☒ SEVIS Designation:   
**System Admin?** ☒ File Manager? ☒ View Secure Documents? ☒  
 View Only? ☐ Password Change Required? ☐ Last Changed: 06/05/2019

Last Hub Login: 09/26/19 14:50  
 Last Portal Login: 09/26/19 16:01  
 Key No: 343  
 Sys User No: 179

So that just leaves Country Coordinator and System Administrator access and I'm not going to take the time to show you all of that. Country Coordinator (or Country Contact) access gives our country contacts the ability to do certain things with student records – such as assign districts, that the general user cannot and should not be able to do or change. Only the chief contact and the YEAH administrators should be providing that access to users. System Administrator – only a current Administrator can provide someone else with that level of access which basically gives the user control over all aspects of the O-E data base with an additional tab call Administration Tab.

There is enough confusion already about where to find things, if all users had all tabs we would have chaos. So control is good in that regard.

So in summary here is what I recommend:

**NO FEAR – YEAH 201 Fundamentals**

**Topics**

- **System User Detail – who has access to what?**
  - Club Counselors = Portal Access Only with club filter
  - Club YEOs = Portal and HUB access with club filter
  - District Committee = Portal and HUB access with only district filter
  - District Officers = Portal and HUB access with district filter and District officer access (box checked) some with File Manager
  - District General Chair = Portal and HUB access with district filter and District Officer and File Manager access (boxes checked) and Secure Documents (box checked)
  - Country Contacts = Portal and HUB access with Country Group Filter, Secure Documents, File Manager, and Country Coordinator access (boxes checked)

Club Counselors – Portal Access Only – everything they need to see and do can be done on the portal and if they have the app (which they should) they can do it from anywhere!

Club YEOs – Portal and HUB access limited to club records only. Some YEOs may be limited to Portal access only depending on what they do in your district. If they recruit and interview and process host families in your district, they should have HUB as well.

District Committee members – portal access and hub access with only district filter

District Officers – portal and hub with district filter and district officer status – some may need File Manager access – outbound chair

District General Chair – Portal and HUB with district filter and district officer and file manager and secure documents (and any one in the district that is doing criminal background checks – needs secure document access)

Country Contact = Portal and HUB access with Country Group Filter, Secure documents, File Manager and Country coordinator boxes checked.

Let's move on:

# NO FEAR – YEAH 201 Fundamentals

## Topics

- System User Detail – who has access to what?
  - Approval Processes – Vol, HF, Students
- NAYEN Trainer courses

Approval Processes – I received several requests and comments about the approval process for Volunteers, Host Families and most of those were related to the online training courses and the schedule and deadlines for those. So, in the interest of time I'm going to start with the training and try to clear that up a bit and then maybe we can talk about other aspects of approvals – especially approval of outbound applicants which will be happening in the very near future.

## NO FEAR – YEAH 201 Fundamentals

- Online Training via NAYEN Online Trainer  
NAYEN = North American Youth Exchange Network
- NAYEN trainer is integrated with YEAH
- YEAH parameters establish which courses are required, how often they must be renewed

As you know student safety is of utmost importance in our program and both RI and the U.S. Department of State have requirements of O-E as a sponsoring organization to vet and train our volunteers and host families to be eligible to run a program. Some of those are required on an annual basis. To best facilitate those requirements and for ease of record keeping, we utilize the NAYEN developed training courses. NAYEN stands for North American Youth Exchange Network, so these training courses are designed specifically for the purpose of Rotary Youth Exchange!

The NAYEN trainer is integrated with our YEAH data base, so that when a volunteer or host family successfully completes a course, their record in YEAH is updated and district and multi district personnel can see that it is complete.

We in O-E can set the parameters for which courses are required and how often they must be renewed and if an individual is automatically enrolled and how far in advance of renewal are they notified of the need to renew.

Here is our current set-up for O-E

**Courses for Volunteers**

Course Name	Avail	Reqd	Enroll	Exp	Note
Youth Protection Awareness	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	365	15
Host Family Orientation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0
Volunteer Training	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0
DOS Local Coordinator Training	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	365	15
Culture Shock & Reverse Culture Shock	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0
Outbound Parent Overview	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0
Counselor Training	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0
Student Overview - The Basics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0

**Courses for Host Families**

Course Name	Avail	Reqd	Enroll	Exp	Note
Youth Protection Awareness	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	0
US Host Family Orientation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	0
Non-US Host Family Orientation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	0
US Volunteer Training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0
Culture Shock & Reverse Culture Shock	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0
Outbound Parent Overview	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0

**Courses for Outbound Students**

Course Name	For	Avail	Reqd	Enroll
Youth Protection Awareness	Parent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Culture Shock & Reverse Culture Shock/Outbound		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Culture Shock & Reverse Culture Shock/Parent		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Outbound Parent Overview	Parent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student Overview - The Basics	Outbound	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Courses for Inbound Students**

Course Name	Avail	Reqd	Enroll
Culture Shock & Reverse Culture Shock	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student Overview - The Basics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Exit

You see here that there are a lot of courses available and designed for specific audiences: courses for Vol, Courses for HF, courses for outbound students and courses for inbound students. Let's look at what this all means – first with courses for Volunteers.

Avail – all but Student Overview are available

Required – only two are marked as required

Enroll – three have automatic enrollment – explain what that means

Exp – only the two that are required have expiration dates and those are annual requirements

Notice – the two that expire are also set to have NAYEN Trainer send you an email saying its time to renew 15 days prior to the time it expires.

Talk about Courses for Host Families – none are required but two have automatic enrollment.

This training is related to a Volunteer status that you see in the volunteer table and the host family status that you see in the Host Family section.

Volunteers											
All	A	B	C	D	E	F	G	H	I	J	K
Vol Name	District	D Ofc	HF?	Club	Status	Access	Appl Recd	Big Check	DOS Cert	Youth Prot	Vol
nder, Cory	6780			Bearden	Approved	WEB	2019-04-04	2019-04-08	2019-04-19	2019-06-27	
si, Barjes	6780			Cookeville Breakfast	Approved	WEB	2019-03-20	2019-03-25	2019-03-22	2019-03-22	
Naomi	6780			Oak Ridge	Approved	WEB	2019-05-22	2019-05-23	2019-05-22	2019-05-22	
L. Don	6780			Morristown	Incomplete		2019-05-21	2019-06-19			
all, Conrad	6780			Morristown	Approved	WEB	2019-04-11	2019-04-16	2019-04-12	2019-05-26	
Test	6780			Cookeville	Approved	HUB/WEB	2019-04-04	2019-04-04	EXEMPT		
ry, John	6780			Mt. Juliet	Approved	HUB/WEB	2019-02-17	2019-06-25	2019-02-24	2019-02-24	
ian, Shelby	6780			Cookeville	Approved	WEB	2019-04-15	2019-06-13	2019-05-17	2019-04-15	
ado, Sabina	6780			Crossville	Approved		2019-05-14	2019-07-03	2019-06-19	2019-06-19	
ter, Jake	6780			Sparta	Approved	WEB	2019-03-29	2019-04-03	2019-04-15	2019-04-15	
ingham, Adam	6780			Cookeville Breakfast	Approved	WEB	2019-03-19	2019-04-02	2019-04-02	2019-03-26	

For example, here is the volunteer table for D6780 and you see one record here that is marked Incomplete. Don't get this confused with the application. This person has completed his application and it has been reviewed and processed by the district chair, but his status is not approved because why? He has not completed the required training. So, guess what – he doesn't have access to student records yet. Do you see that his access column is blank? Once he has completed his required training, then our district chair will give him portal (web) access.

**Don Baldus** Status: Incomplete

Volunteer Application: Rec'd: 05/21/2019 Eval: Approved By: R. Moses Date: 05/21/2019  
 Background Check: Upload Rec'd: 06/19/2019 Eval: Approved By: R. Moses Date: 06/19/2019  
 Reference #1 Conrad Brimhall Rec'd: 05/26/2019 Eval: Approved By: M. Tabor Date: 05/28/2019  
 Reference #2 Gordon Smith Rec'd: 05/29/2019 Eval: Approved By: R. Moses Date: 05/31/2019

Training Summary			
Course Name	Registered	Completed	Req'd
1 Youth Protection Awareness	04/02/2019		<input checked="" type="checkbox"/>
2 Host Family Orientation			<input type="checkbox"/>
3 Volunteer Training	05/21/2019	05/31/2019	<input checked="" type="checkbox"/>
4 US DOS Local Coordinator Training	06/02/2019		<input type="checkbox"/>

View Course Registrations

DOS Training: MM/DD/CCYY  
 Youth Protection: MM/DD/CCYY  
 Volunteer Training: 05/31/2019  
 Last CBC Request: 06/09/2019

Test Results			
Test Name	Date Time	Result	Score
1 US Volunteer Training	2019-05-31 12:14:08	Pass	92.00

1097 Edit Save Exit

Where do you look to get more information about his training status? Open his record and go to the Approval Process tab. There you can see his Status is Incomplete and in the middle of the page you see a table labeled Training Summary. It shows when he was LAST registered for the courses. You also see that he complete the volunteer training course and his results are shown in the Test Results table below. You also see to the right DOS Training date and Youth Protection Training dates are empty. I can all of his Course Registrations by clicking on the appropriate bar on the right and I get this screen.

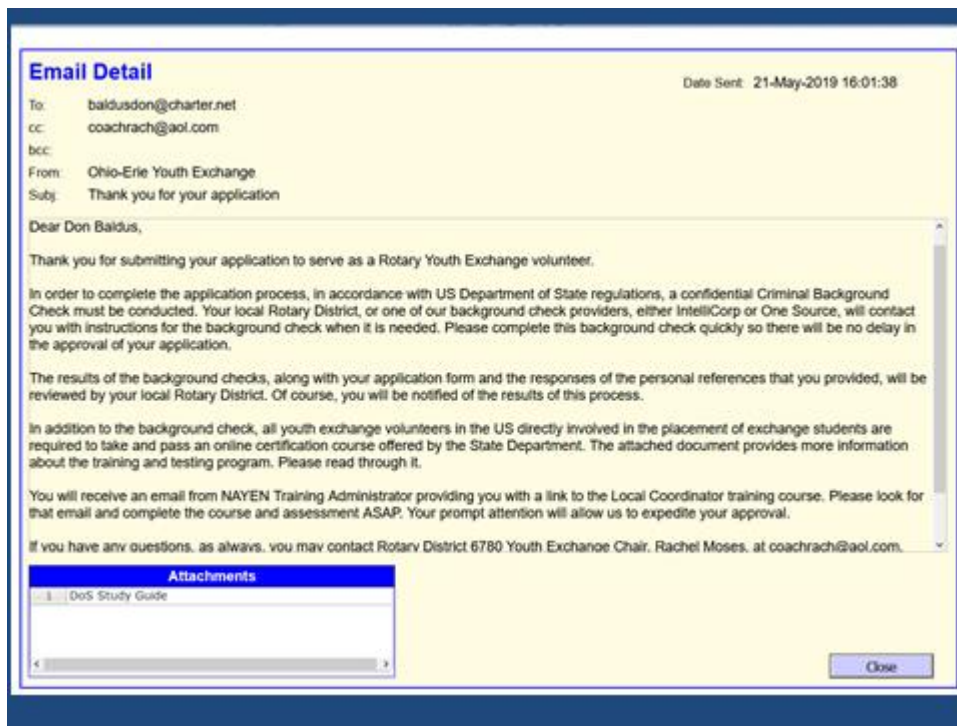
**Don B. NAYEN Course Registrations**

Registered	Name	Course Name
1 2019-05-21 16:01	Donald Baldus	Youth Protection Awareness
2 2019-05-21 16:01	Donald Baldus	US Volunteer Training
3 2019-05-21 16:01	Donald Baldus	US DOS Local Coordinator Training
4 2019-06-09 16:55	Donald Baldus	US DOS Local Coordinator Training
5 2019-06-09 16:55	Donald Baldus	US DOS Local Coordinator Training
6 2019-06-09 16:56	Donald Baldus	Youth Protection Awareness
7 2019-08-02 11:16	Donald Baldus	Youth Protection Awareness
8 2019-08-02 11:16	Donald Baldus	US DOS Local Coordinator Training

Close

This shows he has been registered multiple times for these courses, but has not yet taken two of them. Why?

What I hear a lot and I'm sure you do too, I didn't get the email with any information or any link. Depending on your email provider, some may have settings that kick out certain emails that may appear to be unsolicited and especially those that have links, so it is possible these emails are going to spam or to the junk folder. You should be able to alter your settings to allow emails from O-E and from NAYEN Trainer.



The email a volunteer gets from O-E when they submit their application tells them to look for an email from NAYEN Training Administrator providing you with a link. Here is the email that our volunteer received in May of 2019.

What do you do if you follow-up with them and they say they didn't get the email? Ask them to check their settings and maybe even check with their email service provider (or employer) to allow them to accept emails from O-E and from NAYEN Training Administrator. Then you can generate a new registration for them which will send them a new email. Here's how.

**Volunteer Options**

- Regenerate Documents
- Replace References
- Submit Intellicorp CBC Request
- Register for NAYEN Training**
- Recalculate Volunteer Status

**Approval Process**

Status: **Approved**

Volunteer Application:	Rec'd	Eval	By	Date
Background Check: <input type="button" value="Upload"/>	04/04/2019	Approved	R. Woods	04/04/2019
Reference #1 Tom Thumb	04/04/2019	Approved	R. Woods	04/04/2019
Reference #2 Chocolate Charlie	04/04/2019	Approved	R. Woods	04/04/2019

**Training Summary**

Course Name	Registered	Completed	Reqd
1 Youth Protection Awareness	04/04/2019		<input checked="" type="checkbox"/>
2 Host Family Orientation		01/09/2017	<input type="checkbox"/>
3 Volunteer Training	04/04/2019		<input type="checkbox"/>
4 US DOS Local Coordinator Training	04/04/2019		<input type="checkbox"/>

**Test Results**

Test Name	Date/Time	Result	Score
1 NAYEN US Host Family Orientation	2017-01-09 02:34:18	Pass	100.00

**View Course Registrations**

DOS Training: MM/DD/CCYY  
Youth Protection: MM/DD/CCYY  
Volunteer Training: MM/DD/CCYY

In the Volunteer record (I'm using Test Case here), go to the Approval Process tab and hover on Volunteer Options at the top left above the tabs. Then choose Register for NAYEN Training and that will take you to the next screen

Volunteer Detail Documents Notes/Alerts Approval Process System User Detail

**Test Case** Status: **Approved**

Volunteer Application: Rec'd 04/04/2019 Eval. Approved By R. woods Date 04/04/2019  
 Background Check: Date 04/04/2019  
 Reference #1 Tom Thumb Date 04/04/2019  
 Reference #2 Chocolate Charlie Date 04/04/2019

**NAYEN Course Selection**

Select the desired course, then click "Proceed" to continue.

**Training**

Course Name
1 Youth Protection Awareness
2 Host Family Orientation
3 Volunteer Training
4 US DOS Local Coordinator Training

**Course Selection**

Counselor Training  
 Culture Shock & Reverse Culture Shock  
 Outbound Parent Overview  
 US DOS Local Coordinator Training  
 US Host Family Orientation  
 US Volunteer Training  
 Youth Protection Awareness

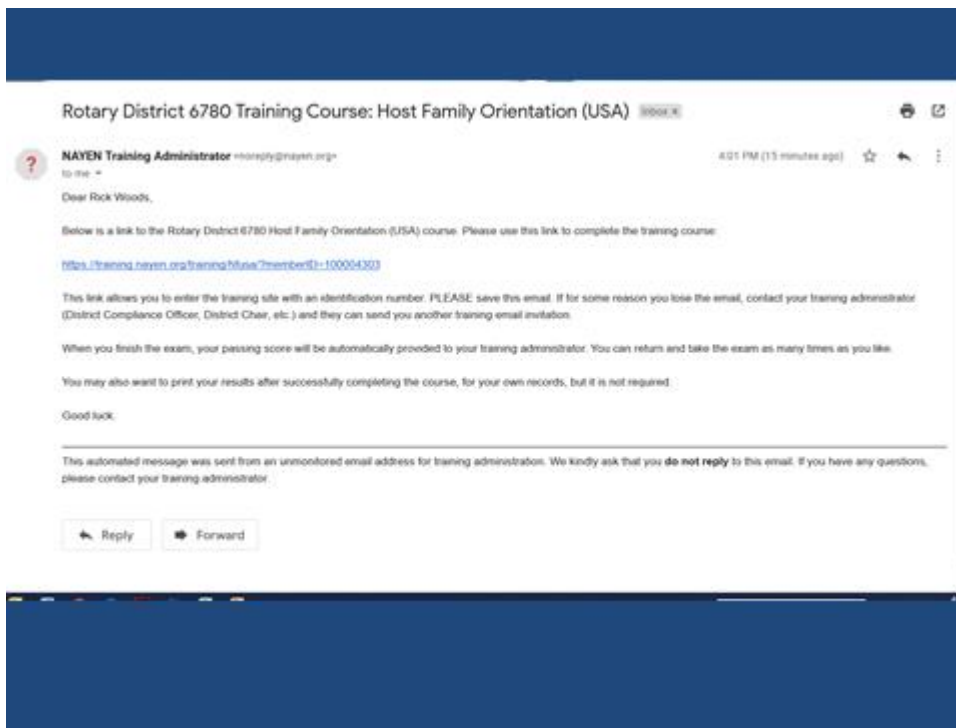
**Test Results**

Test Name	Date/Time	Result	Score
1 NAYEN US Host Family Orientation	2017-01-09 02:34:18	Pass	100.00

343

Save

Here you choose which course you wish to register the volunteer for, then click Proceed (which is covered up by the drop down menu here). Once you hit proceed, you will get a message at the top of the screen in green highlight saying the registration is complete, and the volunteer will get an email. Here is the email I got a couple of days ago when I was testing this



You see this email is from NAYEN Training Administrator but it also has the subject Rotary District 6780 Training Course. If the volunteer is looking for the email it should not be hard to find. This email provides me with the link to the training module.

This process is almost exactly the same for host families. The only significant difference is where you look for the information in the HF record.

Host Families											
AB	A	B	C	D	E	F	G	H	I	J	K
	Host Family Name	District	City	Status	Appl Recd	Bkg Check	Interview	References	Fol		
1	Agbunag, Nicole & Arnold	6780	Cookeville	Approved	2019-04-20	Current	2019-05-16	Approved			
2	Bradshaw, David & Sandra	6780	Oak Ridge	Approved	2019-06-11	Current	2019-07-24	Approved			
3	Carroll, Marie & Tim	6780	Crossville	Approved	2019-04-23	Current	2019-04-24	Approved	Di		
4	Choate, Stacye & Michael	6780	Cookeville	Approved	2019-04-19	Current	2019-05-23	Approved	Cl		
5	Coonce, Daniel & Janet	6780	Cookeville	Approved	2019-04-03	Current	2019-04-11	Approved	Cl		
6	Dedeyan, Jodi & Stephanie	6780	Mt Juliet	Incomplete	2019-02-05	Current		Approved			
7	Farr, Kimberly & George	6780	Knoxville	Incomplete	2019-09-03	Pending		Approved			
8	Gwaltney, Lisa & Ralph	6780	Cleveland	Approved	2019-02-16	Current	2019-03-18	Approved			
9	Jiang, Diantan & Meirong	6780	Knoxville	Approved	2019-04-01	Current	2019-05-25	Approved			
10	Kraus, Paul & Cynthia	6780	Knoxville	Approved	2018-10-01	Current	2018-10-09	Approved			
11	Kunz, Christian & Brigitte	6780	Knoxville	Approved	2018-05-09	Current	2018-05-15	Approved	Cl		
12	Maynard, Samuel & Hegumi	6780	Knoxville	Approved	2019-03-25	Current	2019-04-29	Approved	Di		
13	McDermott, Tim & Stacia	6780	Cookeville	Approved	2019-08-16	Current	2019-09-04	Approved			
14	Morgan, Cindy & Arthur	6780	Sparta	Approved	2019-06-10	Current	2019-07-02	Approved	Cl		

Here is host families for my district and we will look at the Coonce family so I'll show you where to find their training record.

## Slide 43

Host Family Detail

Hosted Students: 1

Documents

Photos

Notes/Alerts

Approval Process

Coonce, Daniel & Janet

HF Application:

Rec'd: 04/03/2019

Eval: Approved

By: R. Moses

Date: 04/03/2019

Reference #1 Larry & Tracy Epps

Rec'd: 04/15/2019

Eval: Approved

By: M. Tabor

Date: 04/15/2019

Reference #2 Justin & Jamie Murdock

Rec'd: 04/06/2019

Eval: Approved

By: R. Moses

Date: 04/07/2019

Home Visit/Interview Report:

Rec'd: 04/11/2019

Eval: Approved

By: R. Moses

Date: 04/11/2019

Follow-up Visit Report:

Rec'd: 08/27/2019

Eval: Approved

By: M. Tabor

Date: 09/03/2019

Host Family Members

Full Name	Birth Date	Bkg Check	At Home?	Status	HF Position
Coonce, Daniel Francis	07-Sep-1978	08-Apr-2019	<input checked="" type="checkbox"/>	Approved	Host Parent
Coonce, Janet Marie Gray	30-Mar-1980	08-Apr-2019	<input checked="" type="checkbox"/>	Approved	Host Parent
Coonce, Emily	23-Sep-2005	Under 18	<input checked="" type="checkbox"/>		Non-Parent
Coonce, Sarah	13-Aug-2007	Under 18	<input checked="" type="checkbox"/>		Non-Parent

Upload Background Check

Edit Host Family Member

Add Host Family Member

Delete Host Family Member

Training Completed: 04/06/2019

Host Family Status: Approved

View HF Course Registrations

View HF Test Results

Submit Home Interview Report

Submit Follow-up Visit Report

Edit

Save

Exit

I open their record and click on Approval Process and just under the list of Host Family Members you see the two options – one for viewing the HF course registrations and the other for View the HF Test Results. If I click there I get this screen

The screenshot shows a web application interface with a top navigation bar containing tabs: Host Family Detail, Hosted Students: 1, Documents, Photos, Notes/Alerts, and Approval Process. The main content area is titled 'Coonce, Daniel Host Family Test Results'. It features a table with test results and a list of dates on the right.

	Name	Test Name	Date Time	Result	Score
1	Janet Coonce	US Host Family Orientation	2019-04-06 02:25:22	Pass	97.0
2	Daniel Coonce Jr	US Host Family Orientation	2019-04-06 02:34:03	Pass	100.0
3	Janet Coonce	Youth Protection Awareness	2019-04-06 03:21:06	Pass	93.0
4	Daniel Coonce Jr	Youth Protection Awareness	2019-04-06 03:27:30	Pass	100.0

On the right side of the window, there is a vertical list of dates: 04/03/2019, 04/15/2019, 04/07/2019, 04/11/2019, and 09/03/2019. Below the table, there are buttons for 'ground Check', 'Family Member', 'NAY Member', and 'Family Member'. At the bottom of the window, there is a 'Close' button.

Below the window, there are buttons for 'Submit Home Interview Report' and 'Submit Follow-up Visit Report'. At the very bottom, there are buttons for 'Edit', 'Save', and 'Exit'.

Here you see the results. Although these courses are not listed as required, HF applicants upon submitting their application are automatically enrolled in these two courses and the email they receive tells them to expect the NAYEN Training Administrator emails.

Inbounds		Inbound Docs		Outbound Apps		Outbound Docs		ST Inbounds		ST OB Apps		ST OB Docs		Student Rpts			
Organization		Officers		Host Families		Volunteers		Bkg Checks		Training		Insurance		Alerts			
Volunteer Affidavit expires after how many days?								1095		Use in establishing status?		<input checked="" type="checkbox"/>					
Volunteer Background Check expires after how many days?								365		Use in establishing status?		<input checked="" type="checkbox"/>					
Volunteer DOS Certification expires after how many days?								365		Use in establishing status?		<input checked="" type="checkbox"/>					
Volunteer NAYEN Certification expires after how many days?								365		Use in establishing status?		<input type="checkbox"/>					
Volunteer Local Training expires after how many days?								365		Use in establishing status?		<input type="checkbox"/>					
Number of References required for each Volunteer application:								2									
Check here if the National Sex Offender check is separate from the CBC:								<input type="checkbox"/>									
Identify any additional document required of volunteers (optional):																	
Additional document expires after how many days?																	
Delete incomplete applications if inactive after how many days?								30		(set to zero to disable this message)							
Send Application Reminders how many days before expiration?								First: 30		Second: 15		(set to zero to disable these messages)					
Send Background Check Reminders how many days before expiration?								First: 30		Second: 15		(set to zero to disable these messages)					
Send personal reference follow-up after how many days?								5		(set to zero to disable this message)							
Send notification of unprocessed Volunteer Applications how often?								Every 5		Days		(set to zero to disable this message)					
Send notification of unevaluated documents how often?								Every 5		Days		(set to zero to disable these messages)					
Refuse web portal access to non-current volunteers?								<input type="checkbox"/>		(requires "Approved" Volunteer Status to log in)							
Require a photo as part of the Volunteer Application?								<input type="checkbox"/>									

Several of you have commented about how confusing the time frame is or time frames are as it relates to applications renewal. So let me show you the current set-up for application renewal. Before I do, you may recall there was near revolt amongst Rotarians in 2014 when we first went to this system because initially you had to renew your application annually! So, we changed that so that you only renew it every three years – but our regulations say you must be trained annually. So your DOS training expires annually (as we have already seen) and your YPA training expires annually and must be renewed, but your application is good. And, your criminal background check must be renewed annually.

Inbounds	Inbound Docs	Outbound Apps	Outbound Docs	ST Inbounds	ST OB Apps	ST OB Docs	Student Rpts		
Organization	Officers	Host Families	Volunteers	Bkg Checks	Training	Insurance	Alerts	Other	Technical
Host Family Application expires after how many days? <input type="text" value="730"/> (set to zero if Host Family Applications are not required) Number of References required for each Host Family application: <input type="text" value="2"/>									
Host Family Background Checks expire after how many days? <input type="text" value="365"/> (set to zero if Background Checks are not required) Send notices of expired Background Checks in current HF's how often? Every <input type="text" value="15"/> Days (set to zero to disable these messages) Send notices of soon-to-expire Background Checks to which families? <input type="text" value="Current Hosts Only"/> (timing identical to Volunteer spec) Check here if the National Sex Offender check is separate from the CBC: <input type="checkbox"/>									
Check here to track training individually for HF members: <input checked="" type="checkbox"/> Identify any additional document required of host families (optional): <input type="text"/> Expires after how many days? <input type="text"/>									
Send notification of unprocessed HF Application how often? Every <input type="text" value="5"/> Days (set to zero to disable these messages) Send notification of unevaluated documents how often? Every <input type="text" value="5"/> Days (set to zero to disable these messages) Delete incomplete HF applications if inactive after how many days? <input type="text" value="60"/> (set to zero to disable this function) Send personal reference follow-up after how many days? <input type="text" value="5"/> (set to zero to disable this message)									
Send Second Host Family Visit reminder how many days after move-in? First: <input type="text" value="30"/> Second: <input type="text" value="50"/> (set to zero to disable these messages) Send notification of overdue Second HF Visit how often? Every <input type="text" value="5"/> Days Second HF Visit is due after how many days? <input type="text" value="60"/>									
Apply users' club filters to host family tables? <input checked="" type="checkbox"/> Selection list for Host Family Change requires Approved status? <input type="checkbox"/>									
<input type="button" value="Edit"/> <input type="button" value="Save"/> <input type="button" value="Exit"/>									

Here is the set-up for host families. Their applications must be renewed every two years but their back ground checks expire after 365 days.

What happens sometimes is a HF renews their application before the previous application expires. Or sometimes they think it didn't go through or they go back and change something and click submit a week after hitting submit the first time. Well if they have a current application that is still good you don't have to process the new application.

But maybe you want to process the new one but something was still outstanding from the previous application submission (a reference had yet to respond to the request). Finally that reference responds to the request from the second application submission – but not from the first. The system is still going to look for that first one and send out reminders every five days that it is missing. When that happens let me know and I will remove the old alerts or tell you and show you how to do it.



When a volunteer or host family first applies, the district is sent an email from the system saying you have a new application – go look at it and determine if it is legit. So someone in your district with district officer credentials must go to the Utilities tab and look at the bottom to find Applications and Referrals. Click there and you will get this next screen

Host Family Applications Volunteer Applications Host Family Referrals Volunteer Referrals					
Open Host Family Applications					
Status	Name	Dist	Club Name	Initiated	Last Activity
1 Incomplete	McDermott, Tim & Stacia	6780	Cookeville	09/06/2019	09/06/2019
2 Incomplete	Woods, Rick & Amy	6780	Mt. Juliet	09/24/2019	09/24/2019

It has four tabs across the top – HF applications, Volunteer applications, HF referrals, Vol referrals. So if it is a host family application you need to look at to process, this is where you go to find it. Also, if the host family has a current application that is still good and you don't want to mess with all the duplicate emails, you can let it sit or you can scrap it at this point in the process. You do not have to approve it to go forward. Same is true with Volunteer applications. If you have old referrals – this is the place to find them and remove them. If you still need a reference from the individual, you can also go here to generate a new request to them. The nagging emails you get every five days do not go to them. They get one reminder (I think) and then you get bugged forever until we stop the emails or we get the reference.

Status	Name	Dist	Club Name	Initiated	Last Activity
Incomplete	McDermott, Tim & Stacia	6780	Cookeville	09/06/2019	09/06/2019
Incomplete	Woods, Rick & Amy	6780	Mt. Juliet	09/24/2019	09/24/2019

Process Application Change District Delete Application Preview Application Exit

I had someone ask where to go to see applications in process. Here in the Utilities Tab under Applications and Referrals is where you preview even incomplete applications of volunteers and host families. Previewing incomplete applications of students happens elsewhere.

## Ohio-Erie Youth Exchange, Inc.

**Test's Program Alerts**

- Wildgruber, Christoph & Marian (H)
- Background Check(s) Missing/Incomplete
- Castillo, Alexa (Aly) (OA)
- Document(s) Pending Review
- Walldorf, Andrew (OA)
- Document(s) Pending Review
- Schroeder, Luisa (Current IB)
- Counselor Report(s) Overdue

Long Term ExchangesShort Term ExchangesUtilities

### Long Term Exchange Program

**Current Inbounds**

**Future Inbounds**

**Past Inbounds**

**Add New Inbound**

**Current Outbounds**

**Future Outbounds**

**Past Outbounds**

**Add New Outbound**

**Outbound Applicants**

**Host Families**

**Volunteers**

**Rotary Clubs**

**Countries**

**Schools**

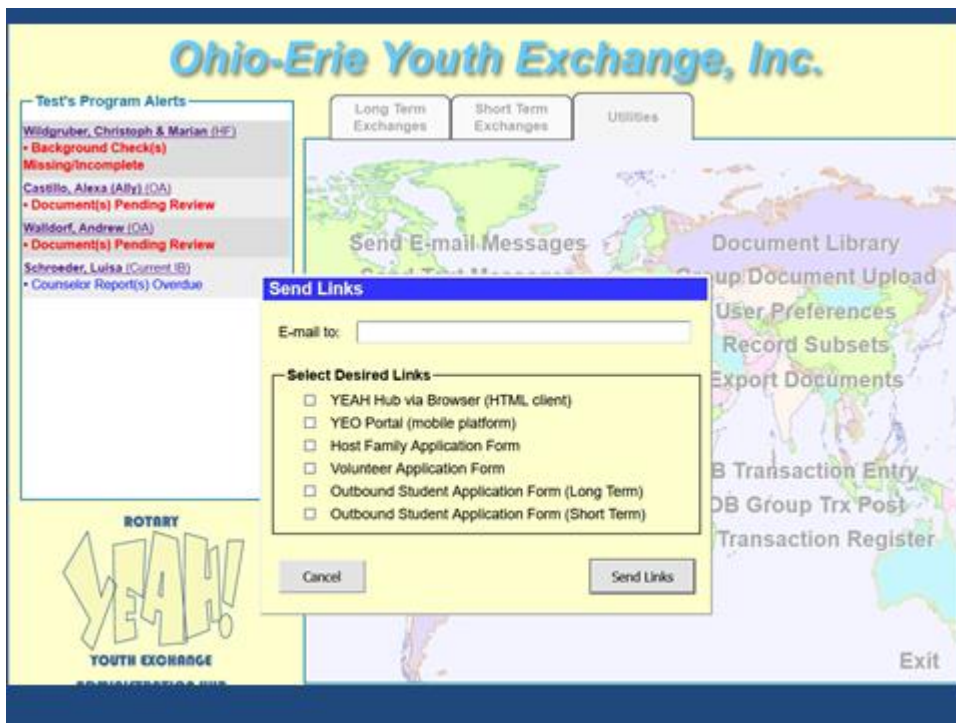
Exit

Of course to view complete and incomplete applications from students either long term or short term, go to Outbound Applicants and click there and then double click on the student's application you wish to view.



What other cool things are found in the Utilities Tab? Remember this tab is available for HUB users but not available on the Portal. All HUB users have some access to the Utilities Tab regardless of their system user detail – some have more options than others. What you see here is Test Case's view and she is currently a district officer so she has all of the extras – club groups, applications and referrals, district information, and user management – all of the items on the right are for financial accounting and I've never used them. They are available and if they work for you, then go for it. But these work best for single fee districts and multi-districts that manage the financials for all outbound students.

I'm going to try to switch to live use to walk you through this section. Especially the Generate a Report and Export data to table – well, and all the rest of it too.



Oh... but first I should show you this. SEND PROGRAM LINKS! Earlier in this presentation I showed you all of the links to apply and log on etc. If you need to send them to someone you can do it easily right here. Just check the box and enter the email address and click "send links" and the system takes it from there.

Go live and talk through and demonstrate

Generate a Report – Travel Itinerary!!!

Club Groups

Record Subsets – for emails

District Information

## NO FEAR – YEAH 201 Fundamentals

Thank you for your attention

Contact me at:

Rick Woods

[rwoods.oerye@gmail.com](mailto:rwoods.oerye@gmail.com)

931-239-5184

I thank you for your patience and your attention. Please feel free to contact me with your questions, problems. I really do enjoy helping you find and solve your issues. I will request again, please provide me with as much info as possible. Screenshots are ideal.

I will take my script and my slides and combine them into a lengthy pdf document that I will put in the document library.

If I did not cover your desired topic here today please talk to me this evening or tomorrow or give me a call and we can talk via phone and I will try to assist you. Thank you!