February, 2017

Creating a Volunteer Screening Invoice



- 1. After you have enrolled a batch of new volunteers, select the "Payments" option on the top toolbar.
- 2. To add a new payment, select "Add Payment".

ontana 4-H Youth	Development Demo	- Cody Stone (County)						Home 4 Stat	e 🕩 Logou
Enrollme	nt Events	Connect	Finances	Data						
Search My A Das	ccount Options	Confirm Members Sch	nools Clubs	s Uiterature Orders	Project Aliases Enrollment	tivities Award	Groups	Group Enrollment	Payments Screening	Reports Reporting
			V	OLUNTEER SCREE	NING PAYMENT L	IST				
id		Transaction Date	Bill Number	Amount	Balance	Method	Check Number	Payment Recei	ved E	dit
256		October 12, 2016	256	150.00	150.00	4H Check	1234	No	Ec	lit 🧷
257		October 12, 2016	257	30.00	0.00	4H Check	987	Yes	Ec	lit 🧷

3. You will see a list of all of the volunteer screening forms that you have submitted and the status of the submissions. A payment fee of \$30/applicant is required for all NEW volunteer applicants.

4. Enter the check number that you will be using. If check number is unknown, enter TBD,

۱	5.	Check all o	f the volu	unteers w	ho will be	e include	ed in thi	is invo	oice.					
	6.	Click "Save	Paymen	t"										
I		Enrollment	Events	Connect	Finances	Data								
		Search My Accou	ont Options	Confirm Members	Schools	Clubs Clubs O	erature F rders J	Project Aliases	W Activities	Awards	Groups	Group Enrollment	Payments	Reports
		Dashbuah	u					roinnenc			Quick Re	eports	Screening	
		Payment Date 10/17/ Payment Total 0.00	2016	dhe Amour	ck Number It Per Form 30.00	I				C	heck All	Uncheck All	Save Pay	ment
						SUBMITTED V	OLUNTEER S	SCREENIN	G FORMS					N
		Nam	ie 🔺	Year	Scr	reening Status		Membe	ership ID		Address		Phone Numb	er
	1	4HOnline, Adu	lts	2016-2017	Pending	$\mathbf{\mathbf{N}}$				36 Richn	nond Ave	555	555-5555	
							Save Payn	nent)					

8. After all of your payments are saved, you need to print an invoice to send with your payment. To do this, in your payment list, click "Edit" next to the payment that you wish to print an invoice for.

ontana 4-H	Youth Develop	ment Demo-	Cody Stone (County	0						🕷 Home 🕴 St	ate 🕞 Logou
Enr	ollment	Events	Connect	Finances	Data						
Search	My Account	O ptions	Confirm Members Sch	nools Clubs	Literature Orders	Project A Aliases	V Awar	rds Groups	Group Enroliment	Payments	Reports
	Dashboard					Enrollment				Screening	Reporting
Add Payr	ment										
				V			IST				(R)
				V	DEUNTEER SCREEN		131				맨
	id	*	Transaction Date	Bill Number	Amount	Balance	Method	Check Number	Payment Read	vived	Edit
256			October 12, 2016	256	150.00	60.00	4H Check	1234	No		Edit 🧷
257			October 12, 2016	257	30.00	0.00	4H Check	987	Yes		Edit 🧷
258			October 12, 2016	258	30.00	12.00	4H Check	RE-ENROLL	No		Edit 🧷

9. Under Quick Reports, select "County-Volunteer Screening Invoice".

Search My Aco Dashbu	ount C	Options	Confirm Members	Schools	Clubs	Literature Orders	Project Aliases Enrollment	Activities	Avards	Groups	Group Enrollment	Payments Screening	Reports Reporting
										Quick R	eports Count	y - Volunteer S	creening Inv
Payment Date 10/	17/2016		Check	Number 1234						Sa	ve Payment	Delete P	ayment
Payment Total 150	.00												
Payment otal 150	.00				SELECTE	D VOLUNTEE	R SCREENING	G FORMS					
Payment otal 150	.00	Form N	lumber	Year	SELECTE	D VOLUNTEER	R SCREENING	G FORMS Membership	ID	Addre	38	Phone N	umber
Name Brown, Red	.00	Form N	lumber	Year 2016-2017	SELECTE Scree Pending	D VOLUNTEER	R SCREENING	G FORMS Membership	ID 12	Addre: 34 Cow Pie Lar	38	Phone N 406-000-0000	umber
Name Brown, Red Bunn, Boy	.00	Form N 4	lumber	Year 2016-2017 2016-2017	SELECTE Scree Pending Pending	D VOLUNTEEF	R SCREENING	G FORMS Membership	ID 12 21	Addre: 34 Cow Pie Lar 0 Taylor Hall	35 Ie	Phone N 406-000-0000 406-994-3501	umber
Name Brown, Red Bunn, Boy Doe, Tom	.00	Form N 4 5	lumber	Year 2016-2017 2016-2017 2016-2017	SELECTE Scree Pending Pending Pending	D VOLUNTEE!	R SCREENING	G FORMS Membership	ID 12 12 21 Po	Addre: 34 Cow Pie Lar 0 Taylor Hall Box 173580	35 IC	Phone N 406-000-0000 406-994-3501 406-994-3099	<u>확</u>] umber
Name Brown, Red Bunn, Boy Doe, Tom Haraldson, Torie	.00	Form N 4 5 3	lumber	Year 2016-2017 2016-2017 2016-2017 2016-2017	SELECTE Scree Pending Pending Pending Pending	D VOLUNTEER	R SCREENING	G FORMS Membership	ID 12 12 21 Po 11	Addre: 34 Cow Pie Lar 0 Taylor Hall Box 173580 1 1st Street	ss ie	Phone N 406-000-0000 406-994-3099 406-999-9999	umber

10. Print a copy of the invoice to send with your payment to:

Montana 4-H Center for Youth Development PO Box 173580 Bozeman, MT 59717

Payment is due within 30 days of enter a volunteer into Verified Volunteers. Outstanding payments may result in a restriction being placed on certifying volunteers in your county (until paid in full), or a late fee.