

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”.

Montana 4-H Youth Development Demo - Cody Stone (County) Home | State | Logout

Enrollment Events Connect Finances Data

Search My Account Options Confirm Members Schools Clubs Literature Orders Project Aliases Activities Awards Groups Group Enrollment Payments Reports

Dashboard Enrollment Screening Reporting

Add Payment

VOLUNTEER SCREENING PAYMENT LIST									
id	Transaction Date	Bill Number	Amount	Balance	Method	Check Number	Payment Received	Edit	
256	October 12, 2016	256	150.00	150.00	4H Check	1234	No	Edit	
257	October 12, 2016	257	30.00	0.00	4H Check	987	Yes	Edit	

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.

5. Check all of the volunteers who will be included in this invoice.

6. Click “Save Payment”

Enrollment Events Connect Finances Data

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Dashboard Enrollment Screening Reporting

Quick Reports

Payment Date: 10/17/2016 Check Number: Check All Uncheck All Save Payment

Payment Total: 0.00 Amount Per Form: 30.00

SUBMITTED VOLUNTEER SCREENING FORMS						
Name	Year	Screening Status	Membership ID	Address	Phone Number	
<input type="checkbox"/> 4HOnline, Adults	2016-2017	Pending		36 Richmond Ave	555-555-5555	

Save Payment

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.

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Enrollment Events Connect Finances Data

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Dashboard Reporting

Add Payment

VOLUNTEER SCREENING PAYMENT LIST									
id	Transaction Date	Bill Number	Amount	Balance	Method	Check Number	Payment Received	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 Account Options Confirm Members Schools Clubs Literature Orders Project Aliases Activities Awards Groups Group Enrollment Payments Reports

Dashboard Reporting

Quick Reports County - Volunteer Screening Invoice

Payment Date: 10/17/2016 Check Number: 1234 Save Payment Delete Payment

Payment Total: 150.00

SELECTED VOLUNTEER SCREENING FORMS							
Name	Form Number	Year	Screening Status	Membership ID	Address	Phone Number	
Brown, Red	4	2016-2017	Pending		1234 Cow Pie Lane	406-000-0000	
Bunn, Boy	5	2016-2017	Pending		210 Taylor Hall	406-994-3501	
Doe, Tom	6	2016-2017	Pending		Po Box 173580	406-994-3099	
Haraldson, Torie	3	2016-2017	Pending		111 1st Street	406-999-9999	
Kosto, Brandi	8	2016-2017	Approved		201 Taylor Hall	406-994-3099	

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.