

# D5080 YEO YEAH Training

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# YEAH Overview

YEAH is the software application we use to manage our district's Rotary Exchange Program. It consists of:

1. a database for storing information about students, host families, volunteers, and Program parameters.
2. a repository for storing documents supporting applications, active exchanges, and government regulations
3. a scheduler that generates notifications relating to training, student security, and reporting requirements
4. the Portal, a web interface for convenient club level reference and document submission
5. the Hub, an administrative interface for managing YE Program parameters and settings, and for managing the student, host family and volunteer application process.

# First Steps

Over the last two years we have used YEAH to manage applications by students, host families and volunteers, but actual exchanges were not occurring. This is our first year using the YEAH application to manage the entire YE Exchange Program.

Access to the Portal is sufficient for many who interact with the YEAH application, but others require the Hub for certain administrative tasks.

The terms “YEAH” and “Hub” are often used interchangeably by that latter group—the “H” in “YEAH” actually stands for “Hub”.

# YEAH Accounts

An account, or profile, is created for each student, host family, and volunteer, from the moment they submit their application.

The presentation of each account type is optimized for its specific use, but each has a Documents tab and a Detail tab which display the relevant documents and the basic personal data relating to the account.

YEAH stores documents in accounts as categorized images (.pdf), so it can't actually comprehend a document's contents.

## External Integration

An external application we call NAYEN manages the training courses. NAYEN is integrated with YEAH to the extent that YEAH prompts NAYEN to email a course link to the trainee, and later NAYEN uploads the graded/marked course result into YEAH.

The Youth Volunteer Management system (YVM) is an external application that is not a part of YEAH. YEAH can send some data and documents (e.g. a CRC report) to YVM but YVM cannot send information to YEAH.

## ...more Integration

The external application VeriFYI handles Criminal Background Checks (CBCs) for USA volunteers and host family members. Its integration consists of receiving a prompt from YEAH to privately solicit consent from the volunteer or host family member, and also uploading the completed CBC report into the appropriate person's account in YEAH for the District Compliance Officer to review and approve.

However:

Criminal Record Checks (CRCs) for Canadian volunteers and host family members are done manually through a Canadian government website or by submitting a CRR026 form.

# YEO Responsibility

Volunteers, Students and Host Families are the YEO's responsibility.

The YEAH system, District Compliance Officer (DCO) and YEAH Administrator are here to assist you by compiling and reporting the required information.

YEO's need to monitor their students and volunteers in YEAH to ensure the approval process is proceeding at a reasonable pace and act accordingly.

DCO will also monitor all accounts and contact the YEO if the process has stalled or a problem occurs.

The Chair and SCRYE will be looking at our records in YEAH for compliance. If it gets to this level you are in trouble!

# YEAH Navigation

The YEAH homepage defaults to the Long Term Exchanges tab, presenting quick navigation to Long Term Students', Host Families', and Volunteers' accounts.

Clicking the Short Term Exchanges tab presents navigation to Short Term Students' and Short Term Host Families' accounts, as well as the same link to Volunteers' accounts.

The tabs above display additional links, and the homepage has Utilities and Reference Files tabs that you may find useful.



# D5080 Youth Exchange Website

YEAH Administration Page link where you will find:

Link to the **YEAH Introduction and Overview** document.

Links to the **Portal**, the **Hub**, the **Volunteer Application**, and the **Host Family Guide** document.

Parents and Host Families Page link where you will find:

Information for parents and host families

Links to the **Host Family Application** and the **Host Family Guide** document.

Students pulldown link which presents:

Links to YE application forms and instructions

Note: We only accept applications through the D5080 Youth Exchange Website

# Portal Access

YE Portal Overview document was sent with your initial welcome email

YE Portal Mobile App can be download from your App store

## Login

1. Inbound Students
2. Outbound Students
3. Host Families
4. Directory & Library

## Log out

# Volunteer

- A new volunteer applies through the D5080 Youth Exchange website
- District Compliance Officer (DCO) accepts the initial application so it can proceed
- Welcome email is sent to the applicant with further instructions
- YEAH prompts VeriFYI to seek consent for CBC (US), or Volunteer to order CRC (CAN).
- Referrals are requested from personal references listed on the application
- YEAH prompts NAYEN to email the required course links to the volunteer
- YEO evaluates the completed application and approves (or rejects)
- YEO interviews volunteer (questions in Portal) and uploads results into the Hub
- DCO reviews/approves CBCs/CRCs, referrals and interviews; monitors training
- When all criteria is met, the Administrator assigns YEAH access (Portal and/or Hub) and YEAH sends an email with access instructions

# Long Term Inbounds

1. Inbound Candidates
2. Add New Inbound
3. Future Inbounds
4. Current Inbounds
5. Past Inbounds

# Host Families

- Host family applies through our District 5080 Youth Exchange website
- District Compliance Officer (DCO) accepts the application so it can proceed
- Welcome email is sent to the family members with further instructions (next slide)
- YEAH requests referrals from references listed on application
- YEAH notifies NAYEN to send 18+ family members the required course links
- YEAH prompts VeriFYI to seek consent for CBCs (US), or order CRCs (CAN) for 18+ family members
- YEO evaluates application and approves (or rejects)
- YEO does first home interview/visit and submits report through Portal
- DCO reviews/approves CBCs/CRCs, referrals, interviews/visits, orientations; monitors training
- YEO does host family orientation (HF-4) and uploads into host family's account Documents (Hub)
- YEO assigns student to host family
- The student cannot move in with the host family until all requirements above have been met
- Alternate person does second home visit 30-50 days after move-in, submitted through Portal

# Long Term Outbounds

1. Preliminary Applications
2. Outbound Applications
3. Future Outbounds
4. Current Outbounds
5. Past Outbounds

# Preliminary Application

Student enters personal data:

1. Applicant Information
2. Parent/Legal Guardian Information
3. Personal Background
4. Siblings
5. Secondary School Information
6. Languages
7. Alternative Emergency Contact in home country
8. Sponsor District and Rotary Club
9. Student's Letter to be used for the club and district interview only
10. Photos

# Promotion

Student makes initial country selections and exits to complete application.

YEAH emails Club Youth Exchange Officer (if student has identified proper Rotary club) and Outbound Coordinator to say that the preliminary application is complete and ready for review.

YEO reviews Preliminary Application in the YEAH Hub and either Rejects or Promotes to the Outbound Application level.



# Outbound Application

YEAH sends an email to the student with a link to provide personal data, a set of 4 photos, and letters from the student and parents that will become part of the full application.

Once the student has completed the first section YEAH sends a second email with 3 links

1. Supplemental Forms (includes instructions for completing the forms)
2. School Reference
3. Country Selection

## Supplemental Forms

Required Supplemental Forms must be completed, scanned and uploaded into student's account Documents. **Scanning must be with a proper scanner not a cell phone photo.** Most documents go to the Host Country and must be high quality.

### Scanned and Uploaded

Immunization Record

School Transcript

Passport

### Blank Form Downloaded, Printed out, Complete, Scanned and Uploaded

Medical Report

Dental Report

Rotary Sponsor Endorsement

Outbound Rules, Conditions & Release

Outbound Student Travel Permission

Outbound Financial Agreement

Host Family Referral

Student Responsibility

## School Reference

- Student enters their chosen reference (teacher, counselor) with email address
- YEAH sends email with link to school reference
- Reference responds via the link--OB coordinator and YEO are notified

## Country Selection

- Student can make changes to the country choices previously made on the preliminary application
- YEAH will only present to the student countries specified by the OB Coordinator and within the age range allowed by our partner (host country)

## YEO Access to Outbound Students' data and documents

- YEOs can use the Portal for quick access to their students' data
- Access to view certain information and approve documents requires the YEO to have HUB access (granted by a YEAH Admin). Access is limited to your club.
- A YEO is granted elevated access to students' accounts to enter and edit data and documents. NOTE: This access level also allows deletion of data and documents, so be cautious! Changed or deleted content will not be recoverable.
- The Guarantee Form can be generated (and regenerated as needed) at any time into the student's Document repository.
- Any additional information important to the student can be entered as a Notes/Alerts or as a Document
- Once the student's required documents are accepted, the Outbound Coordinator will Accept the application, promoting the applicant to Future Outbound Student.

# Future Outbounds

- Outbound Coordinator matches students with countries and assigns country in YEAH
- If the Host District also uses YEAH, they access our student application directly, if not the application is sent by secure email.
- The Host Country accepts or rejects a student application
- Insurance is purchased by us for each student as required by the Host Country. Information is entered in YEAH for each student.
- Tzell assists with Visas, arranges travel and schedules. YEO enters information into YEAH for their student
- Language courses purchased by us from NAYEN are sent to students. Treasurer will bill the student (not part of YEAH)
- Students remain as Future Outbounds until the YEAH system moves to the next year (YE Administrator updates the Current Exchange Year in YEAH)

## Current Outbounds

- Students remain Current Outbounds until Current Exchange Year is advanced
- Using a web link, students submit monthly reports into YEAH for review by YEO and Outbound Coordinator
- Monthly report questions are determined by the Outbound Coordinator and can be updated if needed
- YEAH is capable of sending reminders but we have disabled that function

## Past Outbounds

- Current Outbounds become Past Outbounds after the Current Exchange Year is updated, and remain so thereafter
- Records will be retained as per Rotary International requirements

## Outbound Application Package

- This package contains only the data and documents sent to our partner (hosting country)
- It is important the documents are complete and properly scanned (not just a photo taken with a cellphone)
- YEO's should review each document and reject if it does not meet our standards.