

Online Enrollment – Spring 2018

Quick Instructions

1. Select **Herdbook Online Services**
2. **Log In** by entering
 - 6-digit member number (zero filled example: 000317)
 - Password
3. Under **Data Entry** select **Online**
4. On the inventory tab make sure the year selected is **2018** and the season is **Spring**
5. Choose **Update 2018 – Spring THE Cow Inventory** button
 - This will load your preliminary inventory into the spreadsheet with a row for each female
6. At the top right hand corner, select **Options, Auto Fill**
7. Under Column 1 select **THE-A/B/C/N** and in the blank box to the right fill in the Option you are enrolling in, for example **A**
8. Under Column 2 select **THE-Bill Code** and in the blank box to the right fill in either an **H** for half of the fees or an **F** to pay the full amount now
9. Select **Auto Fill**
10. Now go down your inventory and for the dams being removed place a **removal code** in the **primary code** column and change the **A/B/C/N** column to an **N**
11. For dams being **enrolled**, enter in an enrollment code in the **primary code** column or leave blank if no special code is needed
12. Add any additional females at the bottom of the job on a blank row by their ASA registration numbers. If a blank row is not available, click the cursor in to the last row and hit your enter key a few times to create blank rows
13. Please see numbers 15-16 below for instructions on how to submit your job through completion

Detailed Instructions (use 1-5 listed above)

14. Update Inventory
 - If the dam is remaining in your herd, enter appropriate **Enrollment** code in **Primary Code** column or leave blank if no special code is needed
 - If the dam has been removed from your herd, enter a **Removal Code** in the **Primary Code** column. To designate a second reason for removal (optional), you may enter a **Removal Code** in the **Addtl Code** column as well.
 - **A/B/C/N** Enrollment Type – If you are enrolling in **Option A** - place an **A** in this column. For **Option B** - place a **B** in the column. For **Option C** place a **C** in this column. For **Option D** place a **D** in this column. If the cow is being **removed** from the herd place an **N** in the column.
 - **Remarks** - You may use this column if you wish to have additional remarks on a dam. This column is for member use only, ***ASA will not adjust enrollment*** based on this column.
 - **Bill Code** - This column is to be used by members to indicate how you would like to be billed for your enrollment. A “**H**” in this column indicates you wish to pay half the enrollment fee at time of submission. The other half of the fees will be billed in the second half of the same year. An “**F**” indicates to pay the full THE fee at the time of submission. If nothing is entered or column is left blank, a “**F**” is assumed.

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- To add cows: (Scroll down to a blank row. If you do not have a blank row, click on your last dam and hit your enter key. This will create a blank row.)
 - Cows on file with ASA*, enter ASA number in **AnmRegNbr** column
 - Cows not on file with ASA*, enter tattoo in the **AnmTatt** column, enter birthdate in **BirthDt** and breed(s) in **Brdcds** column.
 - ***Please note:** If your dam has had a calf reported to her or has been enrolled in THE previously, she will have a number in ASA's system. Please enter that number into the **AnmRegNbr** column so that a new dam record does not get created.
15. If there are **Errors** and/or **Warnings**
- **Errors** (indicated in red at beginning of row) or **Warnings** (indicated in purple at beginning of row)
 - Move cursor to the top of spreadsheet and select tab labeled **Errors** or **Warnings**
 - Screen will display each error or warning
 - Errors must be corrected before submitting data to ASA
 - Warnings may need to be corrected before submitting to ASA
 - *Jobs may be submitted to ASA with warnings, but not errors*
16. Once all cows have been given an enrollment or at least one removal code and there are not any errors, select **Submit Data**
- A new page will display; if there are no errors, a **Proceed to Billing** link will be available
 - Select the **Proceed to Billing** link to display a billing summary. THE is billed at the time of submission, so you will have an invoice amount due if you are enrolling in **Option A or C** (after the first deadline all options (A, B or C) will have a balance due).
 - Choose one of the following to complete your job:
 - If you wish to complete payment with a credit card select **Add Payment**. Enter in your credit card information and select confirm. You will then need to select the button **Final Submit** (Only click once). A screen will then show an invoice that you can print and store in your records. It should also say **Invoice Status : Complete**.
 - If you would rather mail a check to ASA, select **Hold Until Payment Received**. A screen will then show an invoice with the current amount due that you can print and store in your records. Note: enrollments will not be completed until payment is received, however, by submitting pending payment you are securing the current enrollment rate.
17. To save job and return later, select **Save and Exit**. The job will remain in an incomplete status under your account. **Please be aware that billing will work off the submission date, not the date the job was initiated.**

*****Please double check** to make sure your inventory job is complete. If you go to **Data Entry**, select **Online** and on the left hand side choose **Incomplete Jobs**. If your **Inventory Dam 2018 S** job is listed with a button that says **Resume**, it is at an incomplete status. Select **Resume** and submit your job through completion.

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18. Submit your inventory by **December 15, 2017** to ensure the lowest possible THE enrollment fees. All rates are listed below.

	<u>Option A (TR)</u>	<u>Option B (SR)</u>	<u>Option C</u>
On/Before December 15	\$15.00	FREE	\$7.50
After December 15	\$16.00	\$1.00	\$8.50

*If you miss the **December 15, 2017** deadline and were enrolled for Spring 2017:

- All of your dams on the preliminary inventory generated by ASA will be enrolled in **Option A** at \$16.00 each.
- Members will have until February 1, 2018 to make adjustments to their inventory (the same way as enrolling) including a choice to change from **Option A** to **Option B** or **C**. (THE fees will be adjusted if you change to **Option B** or **C** within the 30 days).

Note: If adjustments are not made by February 1, 2018, your preliminary inventory will be accepted as is (including enrolled in Option A, regardless of previous year's option). There is a \$1.00 late-enrollment fee that will not be refunded.

If you need assistance please call (406) 587-4531 and enter in the number 5 to be connected to THE department or email THE@simmgene.com