



## 4HOnline Tip Sheet: Preparing for End of the Year Reporting & Rollover

### End of Year – Data Management

- **Enrollment Issues** - Go to “Data” Tab and click on the “Enrollment Issues” icon to take a look at any enrollment issues you may have. This will show errors that need to be cleaned up prior to rollover as these issues will affect your ES237 report. These errors have to be fixed prior to rollover because it is very difficult to fix them after the new year begins.
  - If a 4-H club is flagged – It is possibly that you deleted a club and a member had that club selected as their primary club. To fix this you would either 1): Update the youth’s club yourself, or 2) have the family select another club and mark that one as their primary.
  - There should never be any errors listed under Groups ES237 Totals Do Not Match as the program is set up to prevent you from proceeding until the totals match.
  - If all errors are cleaned up in the current year, you should never have errors listed in the previous year sections.
- **Families without Members** - Sometime you will have families who start a family profile but never add members (youth or volunteers) to the family. To see if you have any families like this, click on the “Reports” tab and then on the downward arrow in “Quick Reports” and click on “Family-Without Members” – the list will download as a PDF file. Once you have the list, you can go to search, families tab, and enter in the last names of the families you were provided and delete them. \*Note: The Quick Report Tab is under the “Reports” tab then on the horizontal line with “Quick Videos” (Under Construction), “Quick Exports” (Check out “Leaders Allowed Login” – it’s a useful report too) and then Quick Reports.
- **Duplicates** - Duplicates have to be cleaned up in the year with which they happen. If duplicates aren’t cleaned up prior to rollover, it is very difficult to fix these afterwards. The key to duplicates is prevention and duplicates are prevented by managers not approving them when you get the message that this is a possible duplicate. To get a listing of duplicates, click on “Reports,” under the “Enrollment” tab, “Quick Reports,” Member – Potential Duplicates, Run Report. It is important to note that this list may not be 100% accurate because it will bring up a set of twins as potential duplicates, etc. This report looks for similarities in names, addresses, same birthdate, gender, etc. So not everything listed on the potential duplicate list will be a true duplicate but this is an easy way for you to double check your records and weed out the true duplicates.
- **Group Enrollments** – To make sure all of your group enrollments have been entered and are counting towards your ES237, click on “Reports” tab, the click on “Quick Exports,” and select “Group Enrollments by County” \*This will download an Excel file of all the information on each

group enrollment. All group enrollments will count toward the ES237 report with the exception of those with a non-applicable delivery mode (not related to a youth group).

- **Are Members Active** – You will want to make sure that all of your member records that should count on the ES237 report are *Active*. *Pending and incomplete members do not count on the ES237 and will need to be approved prior to rollover*. On the “Search” screen, under “Role” click “Youth and Adult,” and under “Status,” click “Pending and Incomplete,” then Search - to get a list of these members and follow up with them to complete their record. Pending means that the member has completed everything and is waiting your approval. Incomplete means that the member has started their enrollment but has not yet submitted it for approval.
  - Flag all the “Incomplete” files (under the Flag Options drop-down) and then send an email to flagged members encouraging them to complete their family profile. If you want to print out the list, the easiest way to do that is to save it as an Excel file (Note the Excel file icon above the first person’s name on your list).
- **Clubs with No Members** - Year end is the time to “Archive” any clubs that were inputted into your system during our program build-out that has NO members. Archiving 4-H clubs that are no longer current will ensure that they don’t show up in next year’s list for someone to choose and join. Under the “Enrollment” tab, click on the “Reports” tab, Click on “Standard,” then Club-Totals, Run Report. ALL of your 4-H clubs should populate on the report. \*\*If you get a BLANK screen on page 2 of the report – it means that ALL of the clubs you have listed in the system currently have “zero” members.
- **ES237 Report** - Running the ES237 report multiple times when entering a significant amount of data is always good idea. Please use this feature to check for accuracy throughout the year too. To do so, click on the “Reports” tab, “Standard,” then click “ES237 (All Report),” Run Report

## What is Rollover

- 4HOnline is a zero base enrollment system – meaning that the system zero’s out at the end of a 4-H programmatic year (NC 4-H uses the calendar year). Thus, members (youth and volunteers) will need to annually re-enroll. This process is simple and allows families / volunteers to update their own profile information annually.

## What happens at Rollover

- At midnight on December 31, all of the individual records in your county database are set aside and a snap shot is taken of them and a new record, with a certain amount of old information is created in an inactive status.
- The only exception is contacts. Contacts are unique in that they do not become inactive at rollover. They stay active until you delete them.

### **Rollover from the Family Perspective: What A Family Will See After Jan 1<sup>st</sup>.**

- On family member screen, they will see all of their family members listed as inactive. They will need to click edit and then click “Enroll for 2020 - 2021.”
- The Personal Information page rolls over from the previous year however, families are shown this page in the re-enrollment so that they can make changes if necessary.
- Health form information will be empty (i.e. it will need to be completed in 2020).
- All authorization fields will be empty (i.e. Photo Release, etc.). Thus, the family member will need to review and provide consent again for the new year.
- The clubs and projects will rollover from a previous year so they will need to be deleted if they are no longer in that club/project and add their new club/project. Therefore, the only clubs/projects that should be a part of the current record are those in which they are currently enrolled and interested in for 2020. \*Previous clubs and projects will remain a part of their permanent record and can be accessed by the local 4-H office or the family by going to the family screen, under member reports and clicking on the family member’s name and Member – Enrollment History. Groups do not rollover.

### **Moving Ahead – Data Management for 2020 & Beyond ☺**

If you have 4-Hers/Volunteers who haven’t re-enrolled by March 1, two months after the new 4-H year began, you need to follow up with them. On the “Search” screen, click “Inactive” under Status for a listing. Flag all the “Inactive” files (under the Flag Options drop-down) and then send an email to flagged members encouraging them to re-enroll. If you want to print out the list, the easiest way to do that is to save it as an Excel file (Note the Excel file icon above the first person’s name on your list).