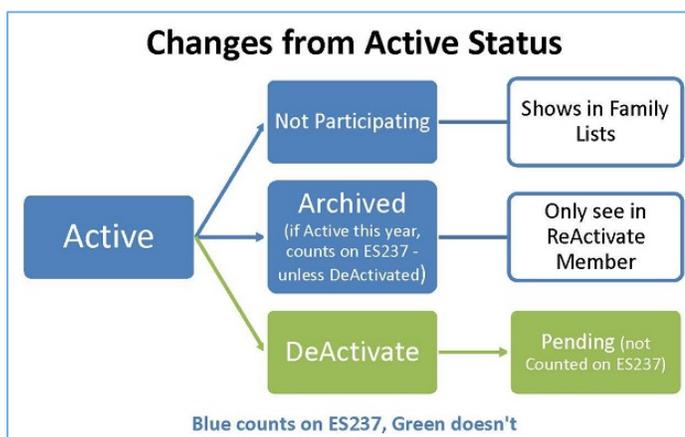
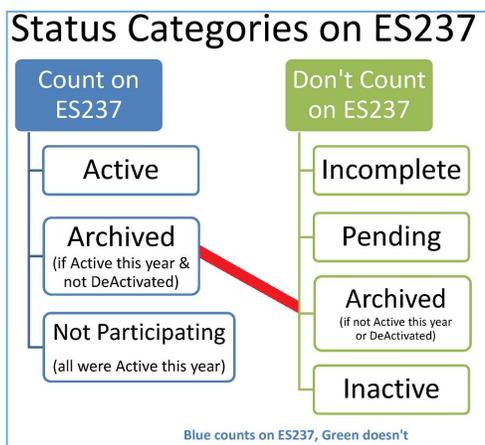


# Member Enrollment Status, ES237 and Rollover

## Before You Start

Sometimes, member enrollment status isn't as simple as "active" and "inactive". Members drop out of 4-H or move partway through the year; high school seniors graduate; and sometimes re-enrollments may be entered before the beginning of a new year. When you're thinking about what to do with member records, there are two things to keep in mind: should that record "count" on this year's ES237, and what will/should happen to the record at rollover.



## Active Status

*Enrollment record entered and approved by the county:*

- 1) Counts on the ES237 for current year
- 2) Becomes Inactive at rollover
- 3) Visible on family account to reactivate
- 4) Reports after rollover, using Previous Year, will show member info on the active record if Active status is selected on standard filters

## Not Participating Status

*Enrollment record entered and approved by the county (active), then the youth dropped out or moved and the status was changed to 'Not Participating':*

- 1) Counts on the ES237 for current year
- 2) Becomes Inactive at rollover
- 3) Visible on family account to reactivate
- 4) Reports after rollover, using Previous Year, will show member info on the active record if Not Participating status is selected on standard filters
- 5) *Is the ONLY way to "deactivate" an Active member if enrollment is tied to online fee payment (UMaine Extension not currently using this feature)*



## Pending Status

*Enrollment record entered and it was NOT approved by the county:*

- 1) Does not count on the ES237 for current year
- 2) Becomes Inactive at rollover – all data entered previously is gone
- 3) Visible on family account to reactivate after rollover
- 4) Years in 4-H field does not count the year when the record was Pending
- 5) If left Pending during the first year of membership, no Membership ID is assigned until/unless the record is Active at some point
- 6) Reports after rollover, using Previous Year, will show member info on the record if Pending status is selected on standard filters

## Active >> Archived Status

*Enrollment record was approved/active, then archived by the county:*

- 1) Counts on the ES237 for current year
- 2) Remains archived at rollover
- 3) Not visible on family account to reactivate after rollover, but are listed in the pull-down “reactivate” list rather than the family list
- 4) Reports created before rollover, using Active status on standard filters, will not show these records, although they will be counted on the ES237—may be confusing because numbers will not “balance”
- 5) Reports after rollover, using Previous Year, may be difficult to use and understand, as the member will be counted as being Active but will not necessarily be listed/counted when only the Active status is selected on standard filters
- 6) When “Archived” status is selected on standard filters for reports (for any year), ALL archived records will be included, regardless of the status of the record when it was archived

## Active >> (Deactivated) >> Archived Status

*Enrollment record was approved/active, then returned to pending or inactive, finally archived by the county:*

- 1) Does not count on the ES237 for current year
- 2) Remains archived at rollover
- 3) Not visible on family account to reactivate after rollover, but are listed in the pull-down “reactivate” list rather than the family list
- 4) When “Archived” status is selected on standard filters for reports (for any year), ALL archived records will be included, regardless of the status of the record when it was archived
- 5) *It is not possible to deactivate a member (other than changing to Not Participating) in states where enrollment status is tied to online fee payment*



## *Tips*

The best way to handle “special circumstances” is to keep the data clean, and to establish a consistent method to handle those circumstances. Scenarios include the following:

- If a record is entered into the database before rollover, when in fact the member enrollment should be for the next year, it should not be approved. A best practice might be to delete the member record (while maintaining the family record), and re-enter the information after the rollover (the important data on the incomplete or pending member record will not remain through rollover anyway).
- If a member drops out or moves, the simplest and most reliable solution is to use the “Not Participating” option. That maintains the option to reactivate if appropriate, will work in all states (with or without online payment), and is reliable in terms of searches and reports.
- “Archived” records can be any status when the archive operation happens, which can lead to confusion when some of them (Active before Archived) count on the ES237, but others don’t. A best practice would be to only archive inactive records.

