

What happens at rollover?

- The old 4-H year database for member (individual) enrollments is closed, and new INACTIVE enrollments are created for each youth/adult with an individual profile in 4HOnline.
- Contacts are **not** made inactive – those stay active until they are deleted.
- Although individual member/adult enrollments become inactive and ready for the new 4-H year, group enrollments for the current year can be entered until January 31, after this date, no changes can be made to previous year group enrollments.
- Records that have been inactive throughout the current year will become archived at rollover.
- DO NOT inactivate/archive your graduated seniors before the year rolls over. This can negatively impact any statistical reporting you wish to do for the year and cannot be undone. If you wish to archive graduated seniors, be sure to do so once their enrollment becomes inactive AFTER rollover.

Clean up data before rollover

Data errors can usually be cleaned up easily in the year in which they occur, but it becomes much more difficult, if not impossible, to adjust records that have existed throughout a rollover into the next year.

1. **Remove families without members.** Reports >> Quick Reports >> Family - Without Members. Locate the family on the Families Search screen, and delete it.
2. **Clean up duplicates.** Reports >> Quick Reports >> Potential Duplicates. Some of these are not truly duplicates—2 kids with the same name, a set of twins, etc.—but if there are duplicates, they will be listed on this report and one of the two records should be deleted. If both have existed through a rollover, they may be eligible to be merged into one record (as long as they were not both active in the same year).
3. **Remove clubs without members.** If the club record existed prior to this year, or if it has had members in a previous year, you will have to archive the club. If the record is new this year and there are no members of the club, it should be able to be deleted.
4. **Review group enrollments,** making sure all have been entered (but only once). Reports >> Quick Exports >> (scroll down) Group Enrollments (by County). This is an Excel file of all the information on each group enrollment. All group enrollments will count on the ES237 except those with a non-applicable delivery mode (not related to a youth group, organizational/admin unit).
5. **Verify all member records that should count on the ES237 are Active.** Pending and incomplete members do not count on the ES237 and will need to be approved before rollover.
6. **If your county clubs use enrollment fees,** those may only be set for the upcoming program year before rollover. After rollover, only the State manager will be able to set County enrollment fees.



Reports before rollover

There are some reports that you may wish to print before rollover. You can run most reports after rollover by selecting “Previous Year” on the main reports screen – but it may be simpler and cleaner to do them now. Reports can be exported to Excel or PDF and referred to or printed as needed.

Standard Reports (counties)

1. **Club** – Club Directory
2. **ES237** – ES237 (All Reports) should NOT be printed/saved until after all group enrollments have been entered.

Shared/Custom Reports (optional)

Member Lists – including information about the following:

- a. Years in 4-H – very useful when Awards Nights are between rollover and full re-enrollment
- b. Custom statistical reports that answer “how many” questions. Although they are available after rollover (Previous Year), it’s sometimes considered easier to run them while all members are active in the current year.
- c. If you use mailing labels, you MAY wish to print or save a PDF of the most common sets of mailing labels that you use so that you can quickly print them while waiting for enrollments to come in.

Things to keep in mind

1. Remove members from a Club before closing or archiving it.
2. If projects need to be removed, simply turn them off for members rather than deleting them.
3. If Custom Fields are no longer needed, turn them off for members instead of deleting them. If they are deleted, they are no longer available for Previous Year reports.
4. Archive any Animal or Club Charter Upload Aliases rather than deleting them, if the files that have been uploaded in that alias will need to remain viewable.

