



4HOnline Tip Sheet:

Preparing for Rollover

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What happens at Rollover

- At midnight on September 30, all of the individual records in your 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.
- Do not archive graduating seniors prior to rollover if they did indeed participate in 4-H this year. Doing so would create issues on your ES237 report. If you wish to archive graduating seniors, do so once their enrollment record becomes inactive, after rollover.

Prior to Rollover – Clean up your Data

- 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 primary club is flagged – It is possibly that you deleted a club and the member had that club as their primary club. To fix this, they would need to select another club and mark that one as their primary. This issue can also occur after rollover, if the member belonged to two clubs and the one they chose not to rejoin was their primary club. The primary club button doesn't automatically transfer over to the remaining club. Thus, the solution is to log into the member's record and mark the remaining club as their primary. If they have more than one club, contact the member to see which club is 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 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. 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.

- 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. 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. 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.
- Clubs with No Members - Year end is the time to delete in 2015 and archive in 2016 a club that has no members to ensure it doesn't show up in next year's list for someone to choose and join. Under the enrollment tab, click on the reports tab, standard, Club-Totals, Run Report. If there is a club that has zeroes straight across, that club can be deleted in 2015 and archived in 2016. Please email Tonya Price a list of the clubs that need to be deleted and she can do that for you.
- Group Enrollments – To make sure all of your group enrollments have been entered and are counting towards your ES237, click on Reports, Quick Exports, Group Enrollments by County. This is an Excel file of all the information on each group enrollment. All group enrollments will count of the ES237 with the exception of those with a non-applicable delivery mode (not related to a youth group, organizational/admin unit, or is left blank).
- 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 status, click youth/adult and pending and incomplete 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 for unit approval. Incomplete means that the member has started their enrollment but has not yet submitted it for approval.

Suggested Reports to Run Prior to Rollover

- Club Directory - The Club Directory is useful if you like to have a paper copy of who belongs to each club and what projects they have. Also, this report is useful if your year-end recognition happens after rollover but before everyone re-enrolls. Having this information from the previous year makes it a little easier to double check your records. To run this report, click on the reports tab, shared, Club-Directory All Members, Run Report.
- ES237 Report - Running the ES237 report is a good idea to double check your records and share with the 4-H agent for verification and to check accuracy. To do so, click on the reports icon, standard, ES237 (All Report), Run Report.

Rollover from the Family Perspective

- 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 2015-2016”. When they re-enroll the grade will be automatically incremented by 1.
- All authorization fields will be empty. Thus, the family member will need to review and provide consent again for the new year.
- Health form information will roll over from the previous year however, please encourage your families to review this information carefully and update as needed.
- 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. Previous projects and clubs will remain a part of their permanent record and can be accessed by the unit 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 so any groups you will have in the new year will need to be entered by the unit office.
- If you have 4-Hers/Volunteers who haven’t re-enrolled let’s say by December 1, two months after the new 4-H year began, you will want to follow up with them. On the search screen, click inactive under status for a listing. Flag all and then send 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. If you have someone at the end of the year that is still inactive at rollover, they will be automatically archived.