Re-Enrollment Guide

What happens to records at the end of the year?

- In 4-H Online, after we've been using it for a few years, we will (at any time) be able to go back and print an ES237 report for any of those years. It wouldn't be a "static" report (PDF created during that year), but instead, is a newly-created report each time it's run, using the data that is coded as being from that 4-H year.
- In addition to the set of records that you are working with at this time, there is a file that is called the "archive". All records of any youth/volunteers/families that were ever active in the program will be in that archive, and they need to remain there because of the historic ES237 capability.

Those two things are important to know when you think about what your files will look like at the beginning of the new enrollment year.

Presently, everyone in your file is "active". At the beginning of the new year (October 1), all adults and youth will become "inactive" because we don't know yet whether they're going to re-join. *Contacts are a special case, and their parameters are listed at the bottom of the document.*

Your files as they are on September 30 of the current year are preserved in the archive. No changes/edits are possible, but the records are still there, available for lists, labels, reports, etc. Not only are they there, but they need to REMAIN there, so that all historic reports use the complete set of data.

What happens to records when we start the new year?

Do Not re-enter people who have previously been entered into the system!

We'll take a case-by-case look at these:

1. **New member/volunteer enrolls for the first time**
   This is the easiest, so we'll get it out of the way first. You will add a new record for that member (and family, if they don't have other kids in 4-H) just as you created all the records for the first time.
   a. **If it is a new family** on the search screen click 'Add Family' and enter all necessary information
   b. **If it is an addition to a family previously entered in the system** find the family, click 'Login' next to the family name then select either 'Add Adult' or 'Add Youth' button from the Manager control panel then fill out the appropriate member information.
2. **Existing member/volunteer re-enrolls for the new year**
   Actually faster—you'll find the record, click 'Login' next to the name. Once you are in the Family Member/Volunteer list click 'Edit' next to the person you wish to re-enroll and at the bottom of the profile information click 'Enroll for Upcoming 4-H Year'. The year will be stated on the button.   Their record will contain all the clubs and projects that they enrolled in the previous year, and you can edit those if necessary. They will probably NOT be a part of last year's groups. Activities will stay attached to their record, along with the appropriate year. If they are repeating an activity from last year, you'll need to add it to the record with the new year.

3. **Existing member/volunteer decides not to re-enroll at all this year**
   At some point, you want to stop seeing those records mixed in with all your current enrollments.
   If they NEVER re-enrolled this year, you will:
   a. **Archive Member** – the member's status changes from Inactive to Archived (for this year only—remember that in the archive file, they have an "active" record for last year). You can only view that person's record by choosing the Archived option, and the only thing you can DO with the record is "Reactivate member". If this person will possibly re-enroll, that's your safest option, BUT eventually you won't want all those non-current members archived (for this year) either.
      i. **To archive** a member click 'Login' next to the member you wish to archive then click 'Edit' next from the family member list to the person you wish to archive. Scroll to the bottom of the personal information screen and click 'Archive Member and select 'OK' on the screen that pops up.
      ii. If you wish to re-activate an archived member login into the family profile and in the top part of the member list section find the pull down member and select the member you wish to reactivate. Click 'ReActivate Member' the member will then be reactivated for the current 4-H year.
      iii. If there are questions on archiving please contact Erika via the connect option on 4-H Online, send an email or call. Note: Do not delete a member unless they have never counted on your ES237 reporting. Deletion is a PERMANENT action and will remove them entirely form the system causing them not to show in any previous 4-H years.

4. **Existing (or new) member/volunteer decides to drop out after re-enrolling this year**
   It's important to remember that if a member/volunteer enrolls for even PART of the year, they should be included in the ES237 report (for that year only). So, they should be handled a bit differently from the ones that never re-enroll at all.
   a. **Archive Member** – the member's status changes from Active to Archived (for this year only—remember that in the archive file, they have an "active" record for last year). You can only view that person's record by choosing the Archived option, and the only thing you can DO with the record is "Reactivate member". If the person changes their mind, you can reactivate them at any time, and since they were entered into this year's archive as an "active" record, they will count on this year's ES237.
   b. **Change Status** – by clicking on the "active" link on the member search screen, you can change that person's status to "not participating", which is the term for exactly these kinds of records—they USED to be active, but now they're not participating any more. They will still count on this year's ES237.
   c. **So, what's the difference**? In this case, the only difference is whether you want to see that record on the main search screen. If you choose Archive, you won't. If you change the record to "not participating", you will. All other things remain equal. Next year, you'll have to remove them from the new year files, while their record for this year will remain in this year's archive.
   d. **Given all that**… if we decided on a protocol state-wide for this, it'd be easier to get lists of those members/volunteers who had dropped out during the year, and there may be some value to that. Or there may not. We can get lists from either the archive or the "not participating" status, but it's easiest through "not participating" probably. Although

lists CAN be generated for both scenarios, it's a pain to combine them. So, I'd prefer "not participating", but I'm not adamant.

"Contacts" Addendum:

Contacts have only the "active" status option because they don't ever count on the ES237. If they belong in your dataset, they have a record. If they no longer belong there, you delete them. Their record would still be in the last year archive in case you need to reactivate them at some point. In terms of new year enrollment time, although they'll be "active" (don't change to "inactive" like members/volunteers), it's not entirely clear whether they will retain their group memberships from the previous year. We have asked for that to happen, and assume that it will before September.