

What happens at rollover?

- Rollover happens at the very **first** minute of the morning on the date you have set as Program Year Start Date in Admin Options. If you have that date set for Sept. 1, midnight on August 31 is when the database changes years.
- 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.
 - The fields that are incremented with rollover are grade, years in 4-H, and years in project.
 - There is no longer any way to edit the data associated with individual member records for the year that just ended.
- Contacts and FFA are not made inactive—they 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 the deadline that is set in your state’s Admin Options.
- If the option has been turned on in your state’s Admin Options, 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 your data

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. Use the Data tab, Enrollment Issues to troubleshoot data errors that can be corrected before rollover. All of the issues listed for “Current Year” will impact your ES237 in some way.
 - Members – the primary error here is missing primary club designation, and that needs to be fixed.
 - Groups – unbalanced. It would be rare to find issues here, but they must be corrected.
 - Groups – delivery mode. These may be correct, but it’s worth checking to make sure that a group enrollment was not entered using a non-counting delivery mode.
2. Remove families without members. Reports >> Quick Reports >> Family - Without Members. Locate the family on the Families Search screen, and delete it.
3. Clean up duplicates. If managers have been diligent about NOT approving duplicate member records, this should not be an issue, but if there are some, they need to be cleaned up in the year in which the duplication occurs. 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).
4. 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.
5. Club delivery mode can only be corrected in the year in which the club was created, not after the club has existed with that delivery mode through a rollover.



6. 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).
7. Be sure 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. This is especially important if you are using Volunteer Screening. Volunteers who completed a Volunteer Screening form but are still pending at rollover will be required to re-enter their screening information.
8. If you are using Livestock ID and have animal types that are set to persist across years, be sure all animals that should have profiles available for the next year are Active (pending animals will not persist).
9. Counties may only set their own fees for the upcoming program year. If they need to set up enrollment fees for the upcoming year, they should do so 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. Remember that PRINTING may not always be the best option. You can export to Excel or PDF and have an electronic file that you can refer to or print whenever you want.

Standard Reports (counties)

1. Club—Club Directory. You may wish to save this file as PDF for your records.
2. ES237—ES237 (All Reports) should NOT be printed/saved until after all of your group enrollments have been entered.
3. Health and/or authorization forms. Definitely save as PDF rather than printing. You may prefer to do it on an as-needed basis, using the “Previous 4-H Year” option at the top of the Reports main screen.

Shared/Custom Reports (optional and dependent on each state’s settings & reports)

1. Volunteer Screening information is only available for custom reports for the current year. If you need a report of the information on Volunteer Screening forms, run and save those reports before rollover. Volunteer Screening forms are still accessible in individual records after rollover, but the fields are no longer available for custom reports.
2. Livestock ID Exports (if your state is using Livestock ID). All the animals (except Active animals that are set to persist across years, such as dairy, dog & horse) will disappear from the screen when at rollover. If you export all of those, you’ll have the information in Excel if you need to refer to it for some reason.
3. 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 print them while all members are active in the current year.



Making Program Changes for the Upcoming Enrollment Year

The optimal time to make changes in 4HOnline is often after rollover, but before enrollment begins. If you need to change the verbiage on Authorizations, add custom fields, change information on the Health or Volunteer Screening forms, add enrollment fees (can be done prior to rollover) or add or change projects and/or Clubs, it is often best to make these changes before you begin accepting enrollments. You may want to consider turning off the following options prior to the evening of rollover to prevent Club Leaders, County, District and Regional Managers and Families from adding re-enrolling members until you have made all the changes:

- Enable Club Leader Management of Members
- Enable County Management of Members
- Enable District Management of Members and Managers
- Enable Regional Management of Members and Managers
- Allow Existing Families to Edit their Records
- Allow New Families to Create their Records

If you have State managers that may enter enrollments, you will need to inform them that you are making changes to the system and that members should not be re-enrolled until the changes are complete.

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.

