

Re-Enroll or Enrolling Members/Leaders (Volunteers)

What happens now and What happened to records at the end of the year?

- In 4hOnline, 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.***

However, your files as of October 1 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?

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




1. New member/volunteer enrolls for the first time

DO NOT RE-ENTER PEOPLE WHO HAVE PREVIOUSLY BEEN PUT INTO THE SYSTEM!

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 press  and enter all of the necessary information.
- b. **If it is an addition to a family previously in the system** find the family, click  next to the family name then select either the  or  button from the bottom of the Manager control panel on the left hand side of the screen according to who you are adding to the system. 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  next to the name. Once you are in the Family Member/Volunteer list click  next to the person you wish to re-enroll and at the bottom of their Profile information click  (the year will be stated on the button). Their record will be pulled up which will contain all of the clubs and projects that they were enrolled in the previous year. Feel free to edit as need be. They will probably NOT be a part of last year's groups. Anything changed will not only be changed for the current 4-H year. 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.

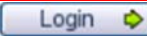



3. Existing member/volunteer decides not to re-enroll at all this year

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**

NOTE: WHEN ARCHIVING A MEMBER THAT HAS BEEN ACTIVATED FOR THE CURRENT YEAR THIS MEMBER IS STILL REQUIRED TO PAY DUES AND WILL SHOW ON THE ES237 REPORT AT THE END OF THE YEAR

- i. 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, after 2 years of a member being archived they will be hidden in the system. **DO NOT DELETE A MEMBER UNLESS THEY HAVE NEVER COUNTED ON YOUR ES237 REPORTING. DELETION IS A PERMANENT ACTION AND WILL REMOVE THEM ENTIRELY FROM THE SYSTEM CAUSING THEM NOT TO SHOW IN ANY PREVIOUS 4-H YEARS.**


- ii. To archive a member click  next to the member you wish to archive. Then click  next from the family member list next to the person you wish to archive then scroll to the bottom of the personal information and click  and select “OK” on the screen that pops up. If you wish to ReActivate an Archived Family Member login to the family profile and in the top part of the Member List section find the pull down menu and select the member you wish to reactivate then click  the member will then be reactivated for the current 4-H year.

ReActivate An Archived Family Member
select a member... 

- iii. If there are any questions on archiving or deleting member please get a hold of Joy via the connect option on 4-H. Remember to use both of these buttons carefully, especially deletion because they do affect the state and federal reports at the end of the year

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 in the search screen, you can change that person's status to “not participating” by pressing . Not participating is exactly the term for 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. It is also a bit easier to reactivate a “not

participating” member because all you have to do is once again change their status just as you did to file them as not participating. 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.