

**Before you start doing year-end stuff, you need to think about repercussions and order...**

- ◆ Re-enrollment forms for current members will only print for New and Return members.
- ◆ Any member who did not enroll last year at all is still Inactive at this point.
- ◆ Members who dropped out during the year should be Terminated at this point.
- ◆ When you do year-end processing, all members and leaders will be Inactive. All projects (if retained from year to year) are also set to Inactive.

**What are the tasks that you should be doing?**

- ◆ Deleting Inactive and Terminated members, and their unlinked parents, to clean up your database.
- ◆ Printing re-enrollment forms for current members.
- ◆ Printing any reports that are maintained in the county office files, reflecting this year's members, projects, etc.
- ◆ Starting a new year, with a new start date, and all members ready to be re-enrolled.

**So, in order, here's what you should do:**

- ◆ **Wait to hear from Becky that your ES237 has been received and your Data folder copied.** Once that folder has been copied, you can do anything to the original.
- ◆ **Print any reports that you maintain in your office.** If you are new, check the files or ask someone who's been there for awhile.
  - You will no doubt need at least:**
    - ✓ An office copy of your ES-237 (make a copy of the one you send in)
    - ✓ An extra set (can be on white paper to copy onto labels) of mailing labels you will need before re-enrollment is complete.
    - ✓ A list of all community club members & projects (Reports|Member/Leader, Complete Report format)
    - ✓ A report of group enrollments and volunteers (ES-237|Print ES237 Group Files, once for Youth Group and once for Volunteer)
    - ✓ A report of leadership & parenting training (ES237|Print Training Log)
- ◆ **Delete Inactive, Terminated, and Unlinked Parents.** These options are all found under the Utility|File Utilities menu.
- ◆ **Print re-enrollment forms.** You may want to set your options so that you don't print for members who are identified as being in grade 12 already, since they won't be back—save paper!
- ◆ **Make your own copy of your Data folder, if you choose to do that.** (see Duplicate Data Folder help sheet).
- ◆ **Do year-end processing. (NOT until AFTER your ES237 is done & mailed, and you are notified that it has arrived)** There are some nice options that you can choose here, so that the information that is left is what you want in your county.
- ◆ **Go to File|County Info** and change the "4-H Age Calculation Date" to 09-15-YYYY. You must use all four digits in the year.
- ◆ **Begin entering enrollments as they come in.** If you have to re-print a re-enrollment form for a previous member, you will have to make them Return first—no forms for Inactives, remember? Before you enter enrollments, you should go to Utility|Preferences, and set some preferences for **at least** the "default project entry".

## Year-End Checklist

Do these things **IN THIS ORDER** to prepare for the new 4-H year:

**DO NOT do any year-end tasks (except re-enrollment forms & reports) until you have completed and mailed your ES237 report AND been notified that it's been received!!**

Done	Task
------	------

_____	Print Re-enrollment forms for existing members. This <b>MUST</b> be done before year-end processing.
-------	--

_____	Print reports and mailing labels for the office.
-------	--

_____	<b>Wait for an acknowledgement of the receipt of your ES237 at the state office before going any further.</b>
-------	---

_____	Delete Inactive Members. (Utility File Utilities, Utilities Delete Inactive...Members)
-------	--

_____	Delete Terminated Members. (Utility File Utilities, Utilities Delete Terminated)
-------	--

_____	Delete Unlinked Parents. (Utility File Utilities, Utilities Delete Unlinked Parents)
-------	--

_____	*Make an archive copy of your Data folder. (See Duplicate Data Folder help sheet)
-------	---

_____	**Delete Projects. (Utility File Utilities, highlight Youth2d, File Empty table)
-------	--

_____	Do year-end processing. (Utility Process Year-End Files)
-------	--

_____	***Choose whether you want retained projects to start out "Active" or "Inactive".
-------	---

_____	Change 4-H Age Calculation Date. (File County Info) Use <b>FOUR</b> digits in the year.
-------	---

_____	Set defaults on the Utility Preferences Default Project Entry. (at least check "Active")
-------	--

_____	Set defaults on Utility Preferences Default Member Entry. (at least Act/Award Year = the END of this 4-H year)
-------	--

_____	Begin entering your re-enrollments as they come in to the office.
-------	---

*\*Optional, but sure seems like a good idea...*

**\*\*If you retain project records from year to year (historical record), SKIP THIS STEP.**

**\*\*\*If you deleted projects (above), you will not have this option. If you keep a historical record, then you should decide whether you want the youth to start out with all of his/her projects listed as "Active" (you would un-check the ones not enrolled in for the current year) or "Inactive" (you would check the ones he/she does enroll in).**