

4HOnline Rollover Check Sheet

	Complete Group Enrollments
	Click on the Data Tab>Enrollment Issues
	Clean this information before rollover. Some members are missing a primary club designation. <i>If this is true in your county, ensure members have a primary club selected.</i>
	Run quick reports
	Report 1: Families-without members
	Report 2: Member-Potential Duplicates (These have to be fixed in the year it happened)
	Run Year End Standard Reports-Save as PDF's
	Report 1: Club Directory
	Report 2: ES237
	Report 3: Health and Authorizations (right-click, start PDF job in queue)
	Report 4: History cards for aging out members
	Run Search Reports
	Report 1: Search for incomplete and pending. Export to Excel
	Run Custom Reports-Save a PDF
	Report 1: Volunteer Screening
	Delete or Archive empty clubs
	If applicable, create enrollment annual registration assessments
	Things to Remember: Senior members need to remain active. Remember not to archive them before year-end.

Things to think about	
	Fix member duplicates the year they happen or they stay a mess.
	Will you have fees for next year? If so, they need to be entered in the system before rollover.
	Will you allow credit card payments? If so, enable this under options.

Things to know	
	All members will become inactive during rollover.
	Senior members need to remain active. Remember not to archive them before year-end.