



For Staff: 4-H Online Rollover Timeline and Checklist

4-H Online Rollover will occur on August 31st, 2022

There will be a brief **SHUTDOWN** to the 4-H Online enrollment system from September 1st – September 12th for system updates.

4-H Online will be turned back on September 12th for members to begin re-enrollment.

The anticipated timeline for rollover and a checklist of tasks necessary to prepare the system for family and volunteer enrollment for the 2022-23 program year are provided in this document.

As we continue utilizing new features in 4-H Online and make adjustments to state settings, we will be closing 4-H Online for a short period during rollover from September 1st – September 12th.

Families and volunteers will no longer be able to log in to the 4-H Online system at noon on August 31st, 2022. Families should be encouraged to complete their enrollments before August 31st, 2022.

4-H Online will be offline for staff from September 1 – 6 for state-level preparations for the new program year. On September 7th, staff will regain access to 4-H Online to pull reports, send broadcasts, create events, etc. **DO NOT start any enrollments for the next program year until 4-H Online re-opens on September 12th.**

**** 4-H Online will re-open for families to enroll in the 2022-23 program year on September 12th.****

IMPORTANT: Staff may want to communicate to families and members in their 4-H community that re-enrollment will not open until September 12th for the new program year.

EVENTS: If you are creating any events for the new program year before rollover, the event MUST BE tied to the 2022-2023 program year when it is created, or members will not be able to register for the event after rollover.

Below is the anticipated timeline for rollover. Any changes to these dates will be communicated to 4-H staff.

What happens on August 31st, 2022 for members?

- At noon on August 31st, the 4-H Online enrollment system will shut down for families and volunteers.
- Families will not have access to the system from September 1st – September 12th, 2022.
- Families are NOT to re-enroll for the 2022-23 program year until the system is open and they can complete the online self-enrollment process on September 12th.

What happens on August 31st, 2022 for staff?

- At noon on August 31st, 2022 the 4-H Online will roll over to the new 2022-23 program year.
- Data in the system is effectively locked for the prior year.
- All records that were Approved, Not Participating, Incomplete or Pending status in 2021-22 will become Inactive status at rollover.
- 4-H Online will be offline for staff from September 1 – 6 for state-level preparations for new program year.
- On September 7th, staff will have access to 4-H Online to run reports, send broadcast emails, create events, etc., but cannot start enrollments for the new program year until September 12th, 2022.

What happens on September 12th, 2022?

- On September 12th 4-H Online will open for members to begin enrolling in the 2022-23 program year.
- Returning members will choose the *Enroll Now* link from the Family Member List.
- New members will need to create a Family Profile before enrolling. See the [Family Guide](#) on [MSU OD site](#).

IMPORTANT NOTE: Staff will need to perform the attached pre-rollover clean-up tasks list before August 31st and the post-rollover tasks list after August 31st.



4-H Online Clean-up Tasks to do PRIOR to August 31st, 2022

Task	Task Details
<p>Clean up all Submitted/Awaiting Review and Incomplete enrollments</p>	<p>From the Navigation Pane > click on the <i>Enrollments</i> tab.</p> <ol style="list-style-type: none"> 1. View any “awaiting review” enrollments and approve if appropriate. <p>From the Navigation Pane > click on the <i>Members</i> tab.</p> <ol style="list-style-type: none"> 1. Search for any members in the “incomplete” status 2. Reach out to members to submit enrollments. <p>Note: <i>Submitted/Awaiting Review and Incomplete members do not count on the ES237 and will need to be approved before rollover to count.</i></p> <p><i>Members in Submitted/Awaiting Review/Incomplete will roll back to not active after enrollment. It is unnecessary to do anything with these status enrollments if they do not need to be counted in ES237.</i></p> <p>If you want to delete these types of enrollments (not required) see Deleting an Enrollment in 4-H Online on the MSU OD site.</p>
<p>Approve Any Club Requests</p>	<p>From the Navigation Pane > click on the <i>Enrollments</i> tab.</p> <ol style="list-style-type: none"> 1. Click on the <i>Club Request</i> tab. 2. Review “club requests” and approve if appropriate. 3. See How to View and Approve Club Requests on MSU OD site.
<p>Review List of Clubs</p>	<p>From the Navigation pane > click on the <i>Clubs</i> tab.</p> <ol style="list-style-type: none"> 1. Review the list of your county clubs. 2. Send Shelly Krueger a list of clubs you would like archived after the rollover to kruege61@msu.edu.
<p>Print Club Rosters</p>	<p>From the Navigation pane > click on the <i>Clubs</i> tab.</p> <ol style="list-style-type: none"> 1. Select a club by clicking on a club title. 2. Click on the <i>Download Roster</i> tab. <p>Note: <i>Printing a club roster for each club is not required. However, many counties may want to save a club roster for recruitment, leader meetings, etc. Club rosters will not be available for the prior year after rollover on August 31st</i></p>
<p>Update all SPIN Clubs with the Correct Title and Delivery Mode</p>	<p>From the Navigation pane > click on the <i>Clubs</i> tab.</p> <ol style="list-style-type: none"> 1. Review your county SPIN Clubs. Make sure they are titled correctly. Must use this format: SPIN Club (club name). Example: SPIN Club Fantastic Foods. 2. Check the delivery mode for your SPIN Clubs. SPIN Clubs are to be set up with the “Organized 4-H Community Club” delivery mode. Edit if necessary. <p>See Staff Guide for Creating SPIN Clubs posted on the MSU OD site.</p> <p>Note: <i>Spin Clubs require the correct title format to be included in statewide reports requested by leadership. Spin Clubs not titled correctly may not get included in reports.</i></p>



4-H Online Tasks to do after rollover

Task	Task Details
Review County Managers	<ol style="list-style-type: none"> 1. Click <i>Managers</i> from the Navigation Pane to view the list of managers at the county level of the hierarchy. 2. If a manager is missing or a manager should be removed, email Shelly Krueger at kruege61@msu.edu.
Review/Edit County Level Settings to allow Members to Add Clubs and Projects	<p>IMPORTANT: Do NOT make changes to <i>Discounts, Payment Instructions, or Payment Options!</i></p> <p>Counties are NOT allowed to receive payments through 4-H Online unless they are a pilot county for events.</p> <p>From the Navigation pane > click on the <i>Settings</i> tab.</p> <ul style="list-style-type: none"> • <i>Scroll down to the Member section –</i> <ol style="list-style-type: none"> 1. Confirm the <i>Member Edit Projects</i> and <i>Member Edit Units</i> settings are set to “Yes.” 2. Confirm <i>Project Edit & Unit Edit</i> settings are set to 08/31/2023.
Verify Clubs	<ol style="list-style-type: none"> 1. Click on <i>Clubs</i> in the Navigation Pane to pull up the screen of clubs for your county. 2. Ensure the list is inclusive of all the clubs you will need for enrollment for the 2022-2023 program year. 3. If a club you believe should appear is not, or you need a club removed, please email kruege61@msu.edu with the details of the missing club. 4. For information requesting/dissolving chartered units, please refer to the 4-H Staff Financial Manual on Sharepoint.
Review each Club’s Settings and Projects	<p>Once on the Clubs page, click on each club and review:</p> <ul style="list-style-type: none"> • <i>Maximum Enrollments</i> information for the club in the <i>Settings</i> section. • Club information in the <i>Contact, Contact Address & Meeting Address</i> sections. Click the <i>Edit</i> button at the top right of each section to make changes. • State Projects are associated with the club. • Click the <i>Add</i> button to associate a project with a Club. Click on the project and choose <i>Delete</i> to remove a project from a club.
Add Activities (if using)	<p>Use of this feature is optional. Some counties choose to use these features to add additional information to member enrollment records.</p> <p>Click on <i>Activities</i> from the Navigation Pane and add Activities for the 2022-2023 program year.</p> <p>See 4-H Online County Manager guide on the MSU OD site.</p>
Add Awards (if using)	<p>Use of this feature is optional. Some counties choose to use these features to add additional information to member enrollment records.</p> <p>Click on <i>Awards</i> from the Navigation Pane and add Awards for the 2022-2023 program year.</p> <p>See 4-H Online County Manager guide on the MSU OD site.</p>

For further assistance, contact 4-H Online Data Coordinator Shelly Krueger at kruege61@msu.edu. 4-H Online supporting documents are posted on the [MSU OD site](#) under Planning, Evaluation, and Reporting.