Verifying Managers

Click in Managers and verify who has manager access in your county. If there are any changes needed, email Mike at mike.farrey@wisc.edu.

Settings

Click on Settings and scroll to the bottom of the screen. Check the Member Project Edit End Date and adjust as needed. This date is when the project selections for approved members is locked for the family. The family is not able to change project selections on and after this date, but staff can still make changes. If your deadline to select projects is January 15, you should set this date to January 16. The projects lock at 12:01 am on the date selected.

Clean Up Awaiting Enrollments

We cannot make any changes to this year's enrollment data after the year end roll over happens.

If there are any enrollments awaiting review, please review those before midnight Aug 31. Check the date the enrollments were submitted before approving an enrollment. If it is a new member, it might be best to wait to approve the enrollment until after Sept 1. The system counts any enrollment approved during August as a full year of enrollment during 2023-2024 and then 2024-2025 is Year 2 for a new member. Enrollment corrections can be made until Aug 31. After Aug 31, the 2023-2024 enrollments are locked and cannot be changed.

All members (youth and adult) will need to start an enrollment Sept 1 or after regardless of when they last submitted an enrollment. If an adult has incomplete trainings or background checks, they will be flagged for the same next year. Any completed trainings will carry over.

Projects

Any changes to project aliases take effect immediately. Click on Projects to see the list of Project Aliases that you have. If you do not have a need to use a Project Alias, it is recommended that you delete these. If you have any aliases listed, these will show up in the Projects selection box on your Participation search screen. Removing unused project aliases helps with using the Participation search screen. If an alias exists for a project, only the alias will appear to the family, not the original project.

To add a Project Alias, click on the Add Project Alias to County button and add the alias. Remember that a project alias will prevent the state project it is linked from showing up. For instance, if you add Duct Tape to the state Art project, Art will no longer show in the list of projects a family can select. Only Duct Tape will show. To see Art in addition to Duct Tape, you need to add another alias for Art and link it to the state Art project.

To remove a Project Alias, click on the alias in the list and then click on Delete. You cannot delete a Project Alias if anyone is enrolled in the project alias. It is best to delete project aliases in the first days of the new enrollment year before families have had a chance to enroll.

Changing Program Years

Since the new program year has been created, changes made to clubs and projects in this program year will revert in the next program year. You must make changes in the next program year for the changes to remain after year end roll over. Click on the Change Year button in the bar at the top and select the next program year.

2023-2024 Program Year	Change Year
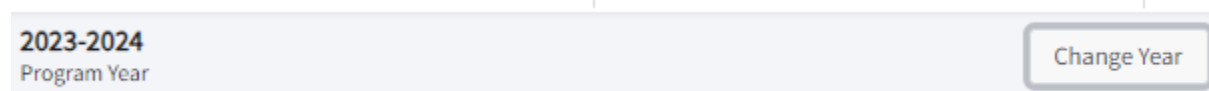
The bar will turn a bright color to let you know you are not looking at the current enrollment year.

2024-2025 Program Year	Change Year

Repeat these steps to change back to the current enrollment year.

Clubs

Year end is a good time to close a club. **Be sure to change to the new year before making club changes**. To close a club, click on Clubs and then click on the club's name. In the second section click on the Edit button. Uncheck the box for Allow Members To Register and then click on Save. To reopen a club, do the same and check the box. If the box is unchecked, the club will not appear on the list of available clubs when families enroll. You can still use the club in reports, but a family cannot choose the club.

To completely remove a club from the new year, send Mike an email with the club name and he will delete it from the new year's options.

Verify the Club Delivery Mode is correct. If the delivery mode needs to be changed, send Mike an email at mike.farrey@wisc.edu with the club name and the correct delivery mode.

Reports To Run

With the ability to run shared reports on prior years, it is easier to run reports after the enrollment year ends, but it is still advisable to download any reports you might need between Sept 1 and whenever most enrollments are in for the new year.

One report you might want to download by Aug 31 is the club roster lists. Go to Clubs and click on a club name. Click on the Download Roster button. Repeat for each club. The rosters will be in your Downloads folder and are named for each club. Your club leaders can download the same report, but after Sept 1 they will need to wait until they are enrolled and approved before downloading the current roster. They have no access to prior year rosters.