### OVERVIEW
4HOnline has a complex structure for member (youth and volunteer) statuses. Some status changes happen because staff makes changes (or clicks something) and other status changes happen because the server takes an action.

### STATUS SUMMARIES AND ACTIONS

<table>
<thead>
<tr>
<th>STATUS</th>
<th>EXPLANATION</th>
<th>HOW IT IS SET</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inactive</td>
<td>Was active last year but has not begun the re-enrollment process for this year.</td>
<td>The server sets this status at rollover. Also, a manager can “delete this year’s record” of a re-enrolling member, essentially setting them back to “Inactive”, as if they had not re-enrolled.</td>
</tr>
<tr>
<td>Incomplete</td>
<td>The enrollment or re-enrollment process was started (by the family or a manager) but the “submit enrollment” button has not been clicked yet. It may mean there are missing bits of information, or just that the button was not clicked.</td>
<td>An enrollment/re-enrollment that is “returned” by a manager will go from Pending to Incomplete.</td>
</tr>
<tr>
<td>Pending</td>
<td>The “submit enrollment” button was clicked, but a manager has not yet approved the enrollment. That may be because of missing paper forms, etc. This applies to both new enrollees and re-enrollees.</td>
<td>A family or manager moves the enrollment to this status.</td>
</tr>
<tr>
<td>Active</td>
<td>A manager has approved the enrollment. This status is necessary for young people to be able to register for events, print some of the standard forms, etc.</td>
<td>A manager sets this status.</td>
</tr>
<tr>
<td>Not Participating</td>
<td>The person was Active at one time, but later dropped out. They are still eligible to be counted on the current es237.</td>
<td>A manager sets this status.</td>
</tr>
<tr>
<td>Archived</td>
<td>This person is definitely NOT re-enrolling this year (grad. Srs.), or they did not re-enroll all year and now it’s time for next year.</td>
<td>A manager sets this status.</td>
</tr>
</tbody>
</table>
STATUS NOTES

- At rollover, all records are inactive. However, each person has a record for the previous year that shows them as active with all their projects, etc. That’s so that whenever you need to print the es237 (or other reports) for that year, the data still exists as it was on the day before the rollover. You just can’t SEE that record without printing a report. If you reactivate a member, then all of the data from last year’s record is copied into the new record—projects, clubs, grade incremented, etc..

- AFTER rollover, if you activate a member, that effectively creates a new record for the current year, in place of the “inactive” one that was there. 4HOnline says something about deleting the current year record, which puts the kid back to Inactive, just like they were before any reactivation.

- The member (Profile) table is dynamic and shared across all years—each year has its own Enrollment fields, etc.

- What “archive” does is basically remove the records from the screen and the “active” process/loop. You can still reactivate an archived member at any time, and their records for previous years still exist. They just don’t show up on your “inactive” list. You can see them if you select Archived from the search screen, but I encourage folks to leave that unchecked to avoid confusion.

- It’s difficult to find archived families (as compared to archived members).

- The only way to get those previous years’ information is to print a report. That’s where the year pull-down on the report screen becomes your friend.

- At rollover time, Pendings and Incompletes are changed to Inactive. However, they will not have a Membership number (unless they were at one time Active and then set “back” to Pending.

- Can only delete Pending or Incomplete – [Delete] removes that enrollment record. If they were never Active, they are truly deleted. If they were active, Deleting will only archive them. If never active - won't have a Member ID - then they can be deleted.

- The reports tool offers two fields for reporting on Status
  
  - [Member: Status] looks at the most recent status - what they are in the current year (much like their address is looked at).

  - [Enrollment: Status] - will vary depending on data year being reported on. (See last page for more info on reporting statuses.

  - For more info, refer to the last page of this document.
STATUS FLOW CHARTS

The diagrams on the following two pages outline the flow and process related to status.

Status Category Flows

Blue path to make Active and count on ES237,
Green path to DeActivate and stop record from being counted on ES237
(use to remove accidentally activated duplicate records)
Black paths to stop record from showing on Confirm Member screen
Changes from Active Status

Active

- Not Participating: Shows in Family Lists
- Archived (if Active this year, counts on ES237 - unless DeActivated): Only see in ReActivate Member
- DeActivate: Pending (not Counted on ES237)

Blue counts on ES237, Green doesn't

Status Categories on ES237

Count on ES237
- Active
- Archived (if Active this year & not DeActivated)
- Not Participating (all were Active this year)

Don't Count on ES237
- Incomplete
- Pending
- Archived (if not Active this year or DeActivated)
- Inactive

Blue counts on ES237, Green doesn't
**MEMBER: STATUS**

Can be thought of as the "Profile Status". It's the status that is reported on their Profile page - like their address. Member's only ever have one profile and what's on there is on there. If you change their address from Main St. to Second Ave, then the profile is changed - regardless of the dataset (year) you are looking at.

For example, if you were running a report on 2005 data (assuming that was possible - if we'd been using 4HOlive since then) - and you asked for their mailing address, you'd get "Second Ave", even though that wasn't true in 2005. The address comes from the Profile.

Similarly, if you were running a report on 2005 data and asked for Member: Status, it would be their "right now" status - even though it might be different "right now" than it was in 2005.

**ENROLLMENT: STATUS**

This is "frozen in time" data. An example of this kind of data is a member's enrollment in Foods in 2005. If you were again running that report with 2005 data, you'd see their Foods project as part of the report, even if they are not "right now" enrolled in Foods.

So, if you were running that 2005 report and included Enrollment: Status, you'd get their Status from 2005, not today.