#71 - CYMS Training Guide – Youth Preparing for Next Season
Sports / Classes
(10.3 – Updated June 2011)

Preparing Your Activities for the Next Season

Before your new season starts, you need to prepare your activities.

- First you will need to clear the roster.
- Next you will need to change the dates to reflect the correct dates for the new season. This is an important step that affects the Annual Reports.

> **Note:** This applies mostly to your sports and camp programs. Boys & Girls Club and 4H Club activities will only be transferred after running your reports at the end of the **calendar** year.

Clearing the Roster

1 Prior to transferring rosters to history, it is highly recommended that you run an Activity Trial Balance **(Reports → Activity → Financial Reports)** to determine if there are patrons that owe money for those programs. Any balance found should be researched to determine if it is valid.

If you determine a balance is invalid you should fix using Global Cancel/Change and Update Charges.

If you determine a balance is valid you may proceed with the Transfer History All steps below. The balance will become a previous year balance that must be paid using the **Previous Year Payment** program.

2 Go to **Period End → Activity → Activity Roster Maintenance → Roster Transfer to History (All).**

3 Select the range of activities.

> **Note:**
>
> \- If you are transferring a **singe activity** to history, select the same activity for both **Beg Activity/Section** and **End Activity/Section**.
>
> \- If you are transferring **multiple activities** that are **not** in consecutive order on the list, you will need to run this program several times.

4 If you wish to move **everyone** on the roster to history, enter today's date in the **Enrollment Cutoff Date.** If there are current year children who were enrolled on Last Year's roster by accident, you can use the enrollment date as a way to move only Last Year's children to history while leaving this year's children alone.

5 In the **Transfer Posting Date** field: Typically if the children that are being moved to history are from an August 2010 roster, you should use a Transfer Date from August 2010. If the children being moved to history are from a June 2010 roster, you should use a Transfer Date from June 2010. This is an important piece of information on the annual report.

6 Enable the *Purge Answers to Questions Linked to Rosters* toggle if you have question groups linked to any of the sections being transferred. Those are for last year's enrollments.

7 Select to *Include Rosters That Still Have a Balance Due*. This will transfer children to history even if they owe money on the enrollment. As long as you have researched balances as described in Step 1 above this should be fine as it is okay to transfer a 'valid' balance to history.

If, however, you choose to ***not*** include rosters with a balance due (toggle is de-selected), the system will skip any child that owes money, leaving them on the current roster and print a list of those children. Realize that you should still work this list prior to performing 'current' enrollments. This might involve more research on why they owe money and individual roster transfers to history.

8 **Select other toggles as needed.**

9 Click **Transfer**. Click **Yes** to the challenge message.

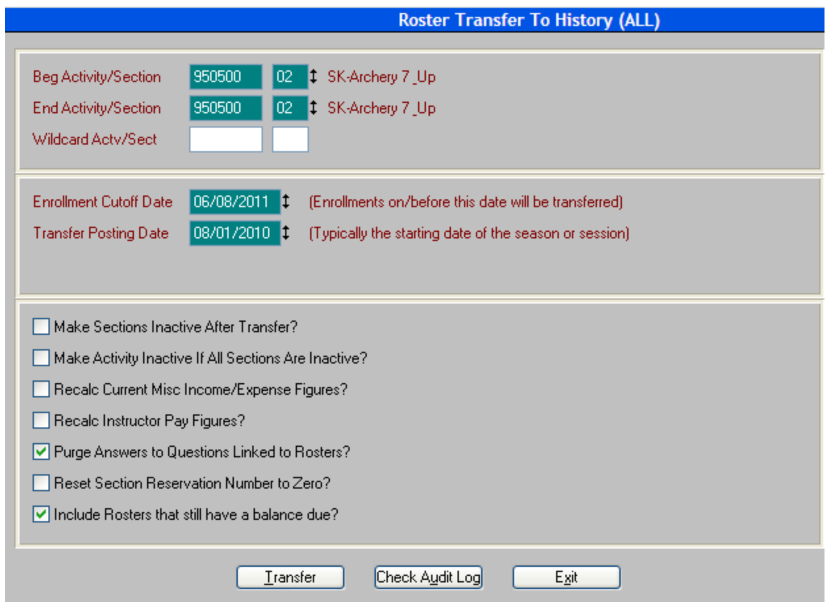

Figure 1: The Roster Transfer to History (All) selection screen

10 Click **OK**. Repeat the process for other programs or click **Exit** to return to the Main Menu.

Updating Activity Dates

1 Go to **Files → Activity → Activity Maintenance**.

2 Highlight the activity you want to update. Click **Sections**.

3 Highlight the section you want to update and click **Core Info**

4 VSI recommends that you review all screens/fields for accuracy including but not limited to: Begin/End Date, Begin/End Time, Max Count, Age Range, Aging Date, Fees, Comments and Webtrac information, etc.

5 Click **Done**.

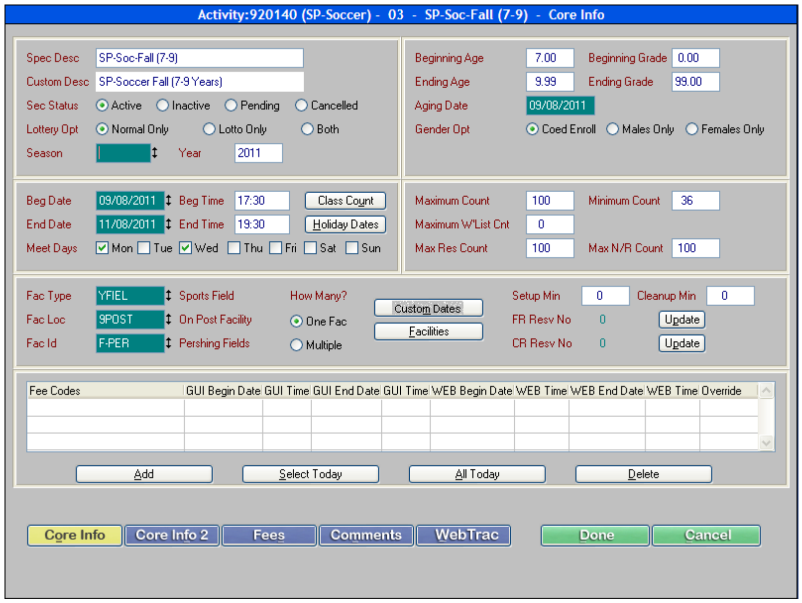

Figure 2: The Activity Section Core Info screen

6 Repeat steps 3 through 5 for all *sections* you want to update.

7 Click **<<Class List**.

8 Repeat steps 2 through 7 for all *activities* you want to update.

9 Click **Exit** to return to the Main Menu.