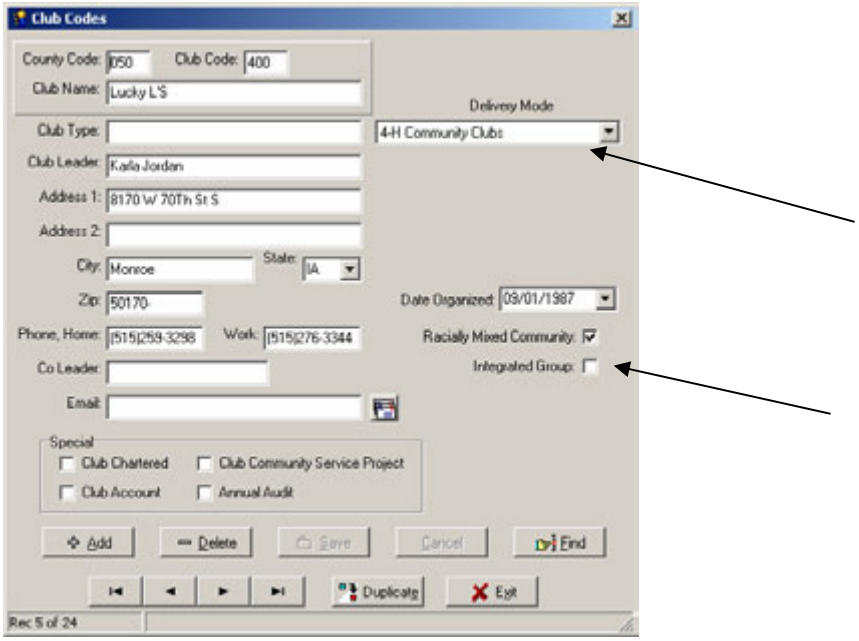
Balancing the County ES-237 Report

1. Check Master Files:

Master Club Code File-
Check the master club code file. The ***Integration Status*** of the club and the community must be marked. This establishes the integration status of each club member. Check carefully. Print the master club report **(Reports|Print Data Files|Club Code File)** to verify the data.



Check the ***Delivery Mode***. If the club/unit is used for the Primary Club or only club membership for a member, that member will not count on the ES-237 report. Each member must have a *Primary Club* designation that has a legitimate *Delivery Mode*. That Primary Club Code must also display in the Club/Unit tab as a club membership for that member.

Note: The Member Screen on the next page. The member has a valid Primary Club Code in the upper right corner of the screen. He also has one or more club memberships, one of which is his primary club, in the club membership screen.

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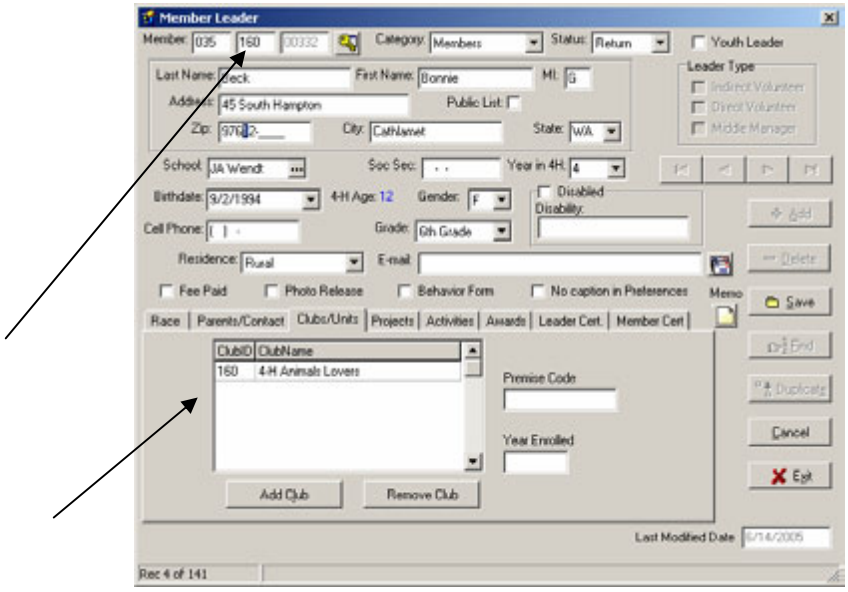
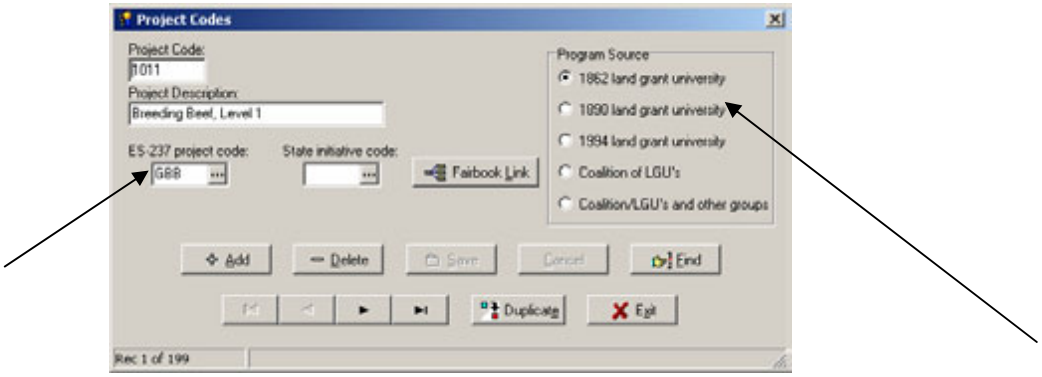


Master Project Code File –



Check the master project code file. All project codes must have an ES-237 code for that project to count toward participation in a Federal Curriculum area. The complete list of Federal Curriculum Codes and their definitions can be found in the *Appendix* of the User's Manual. Print the master project code list for verification**. (Reports|Print Data Files|Project Code List)**

Each master project code record must also have a Program Source indicated.

Note: A project code record without a Program source designation will cause the following error, 'is not a valid integer value', as the report displays or prints.

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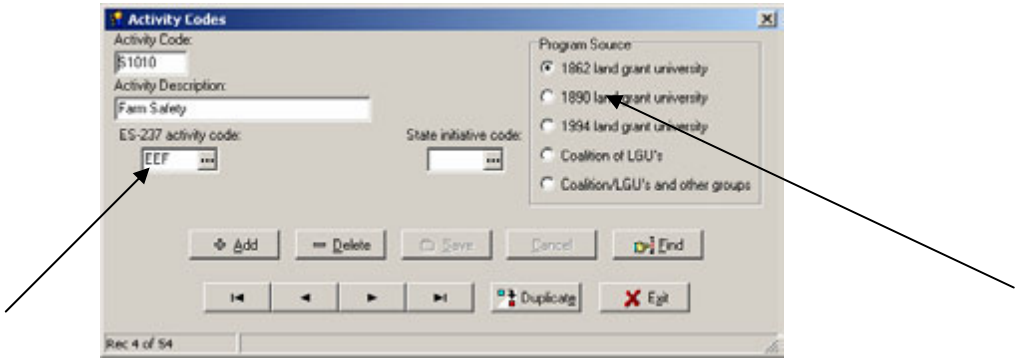
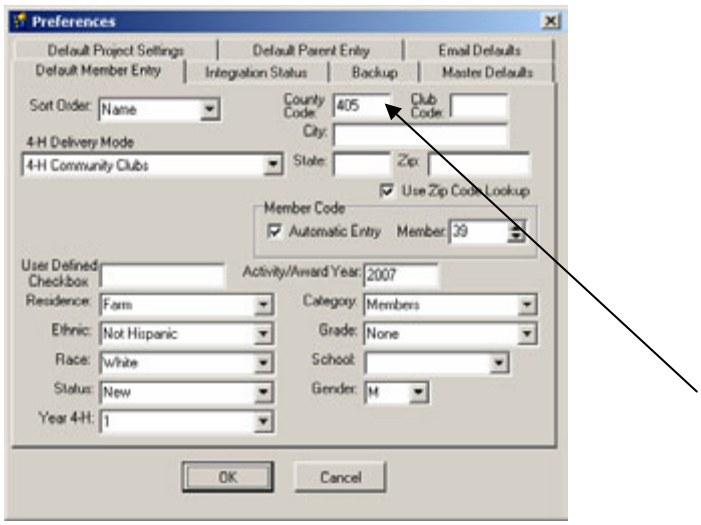
Master Activity Code File –



Check the master activity code file. Any activity that is to be counted in the Federal Curriculum area must have both an ES-237 code and a Program Source. Print the master activity code list for verification. **(Reports|Print Data Files|Activity Code File).**

Preference Screen/Default Member Entry –



Go **Utilities|Preferences|Default Member Entry**. Your correct *County Code* must be entered on this screen. This code is written to the ES-237 files that are sent to the state office. This code identifies your county.

2. Input Final Data:

Members/Leaders –
All members and leaders associated with organized club/units are maintained in the member/leader file as individual records.

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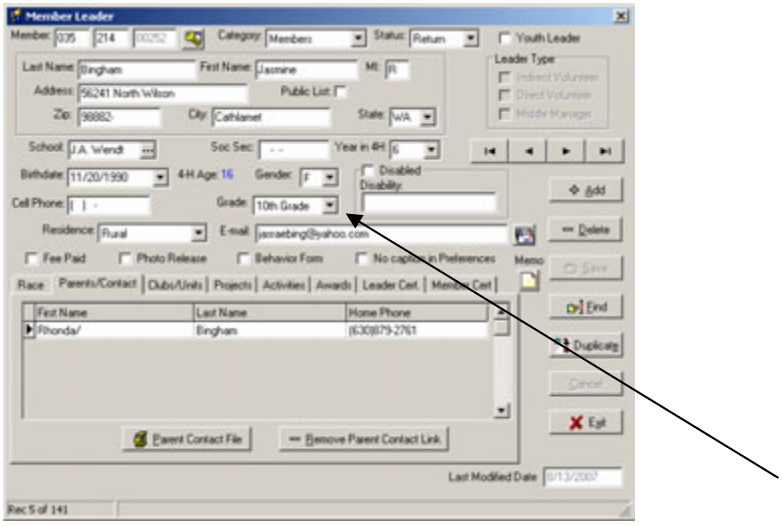
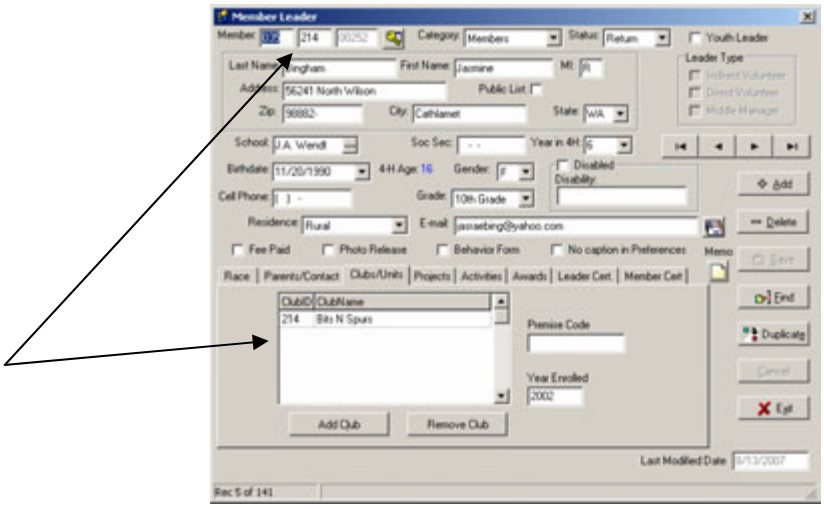
Each member record must contain the following:

a. **A valid grade designation.** Pre-kindergarten members are listed as kindergarten for federal reporting.



b. **A valid club membership**. Individual Study members are grouped into an individual study unit for reporting purposes.



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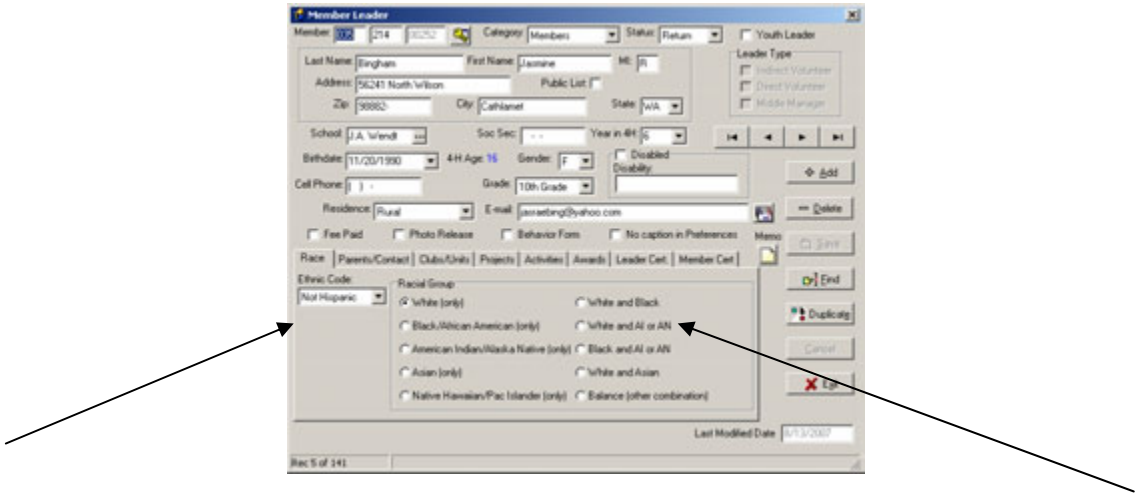
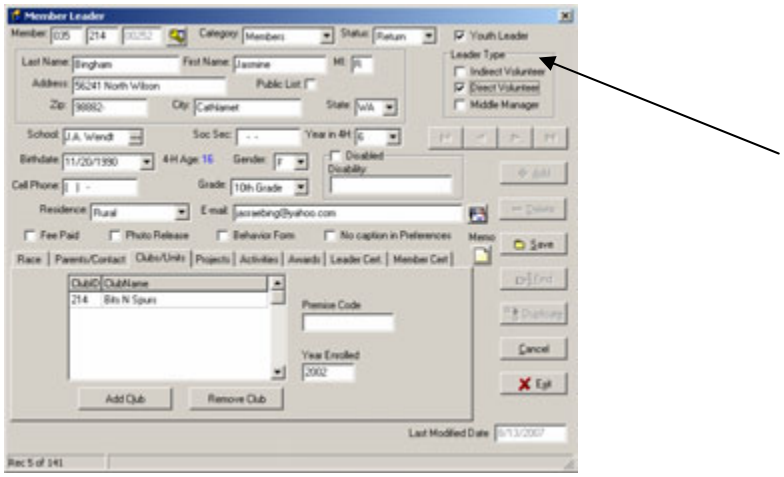
c. **Valid gender and ethnic/racial information.**



d. **If a member is a Youth Leader, they must have a Leader Type indicated**. Records with the *Category Type* of general leader, project leader, activity leader, or resource leader must also have a *Leader Type* indicated. This is required to have this record count on the volunteer portion of the ES-237 report.



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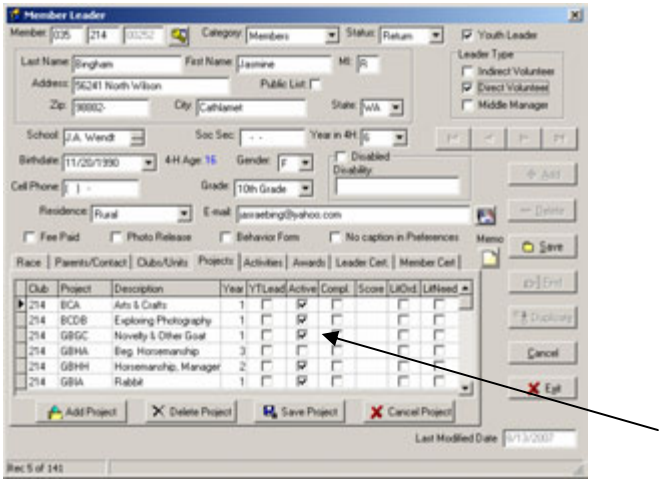
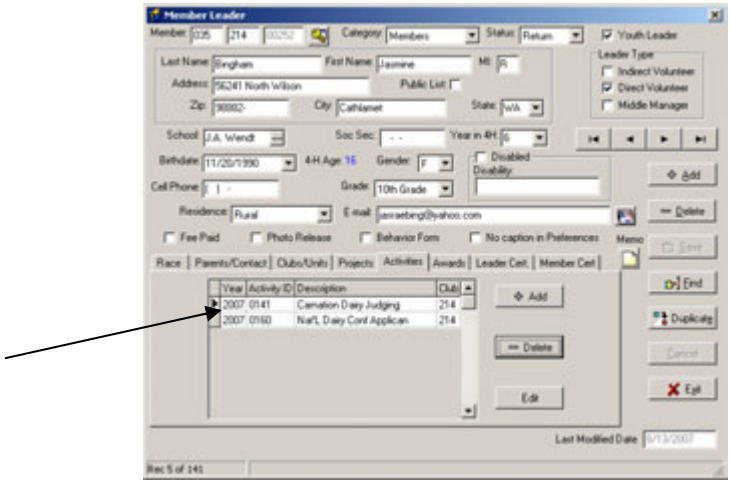
e. **Projects must be marked 'Active'**. Only active projects are counted on the Federal Curriculum portion of the ES-237 report.



f. **Activities must be listed for the current year**. If activities are set to be counted on the Federal Curriculum portion of the ES-237 report, they must be listed with the current year of participation.



Group Youth Enrollment –

Add all remaining 'Group Youth Enrollment' records. Go ES-237|Group Youth Enrollment. Group records are added for any activities that involve youth, but the names and addresses of the participants are not needed in the member file for office management purposes. Group records usually include school enrichment programs, special interest activities, camps, etc. If the group activity involves a specific project or activity code, enter a valid code on the record. This shows participation under the Federal Curriculum section of the ES-237 report. The Club Code and Contact Hours are entirely optional.

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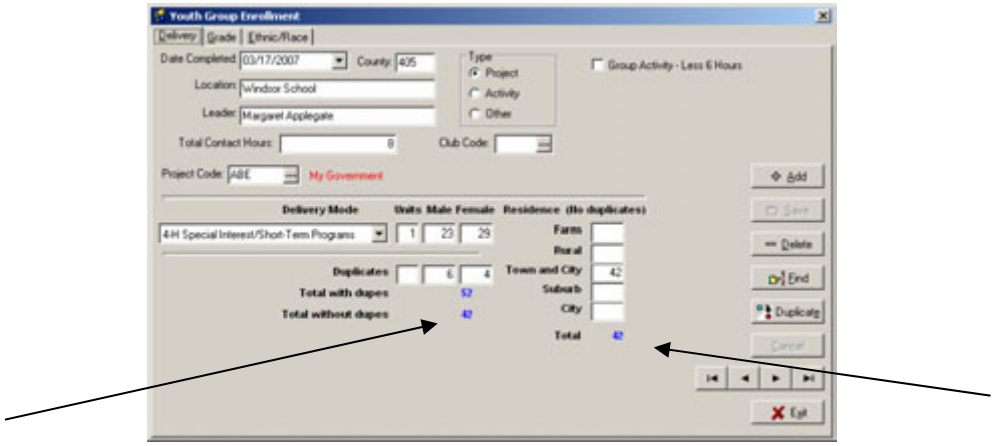
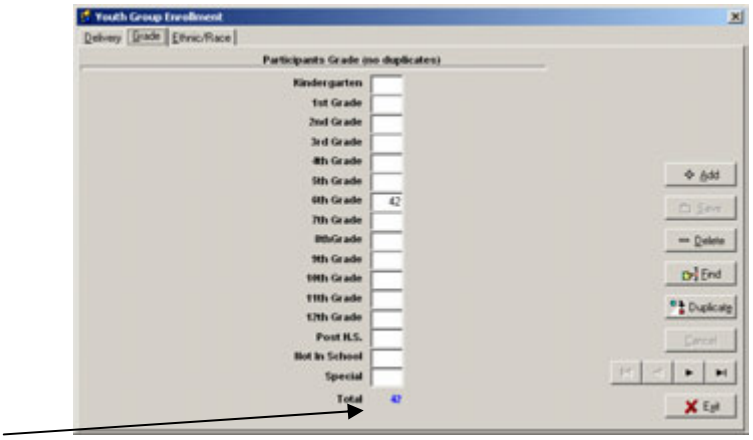
a. Page 1:



The **'Total without Dupes'** under ***Delivery Mode*** must equal the 'Total' under ***Residence***.

Note: 'Total Contact Hours' and 'Club Code' are not required for ES-237 reporting. If a group record is marked as 'Group Activity-Less 6 Hours', it will not report on the ES-237 report. Activities under 6 hours in length are reported for state purposes only.

b. Page 2:



The '**Total**' under ***Participants Grade*** must equal the totals on the first page.

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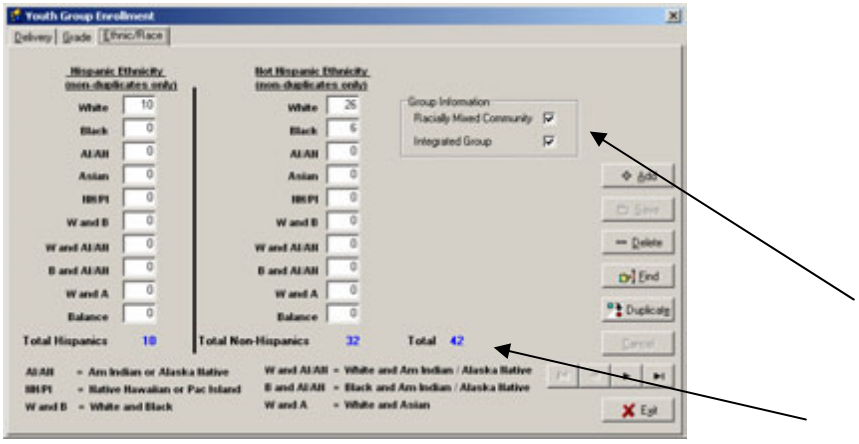
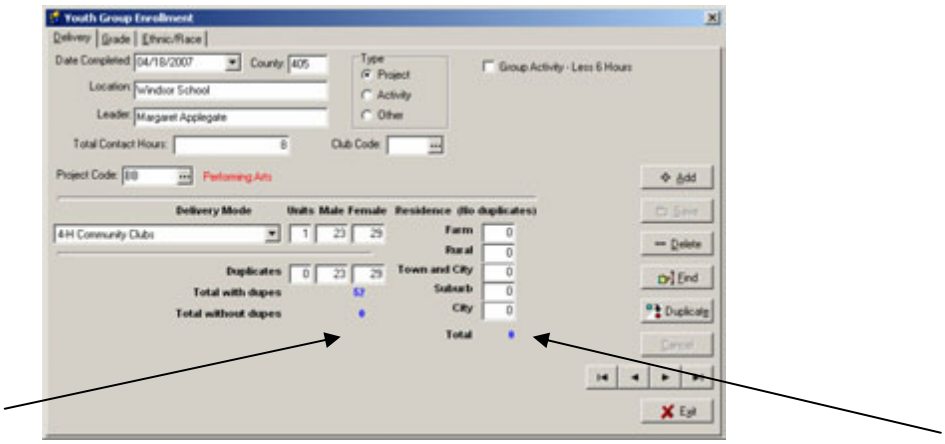
c. Page 3:



The **'Total'** by ***Ethnic/Race*** must equal pages 1 and 2. The ***Group Integration*** information should also be set correctly.

EXAMPLE - A Group Youth Enrollment record that shows all duplicates.

Page 1:



The entire group is duplicated. This record will only count on the Federal Curriculum portion of the ES-237 report. The totals are zero.

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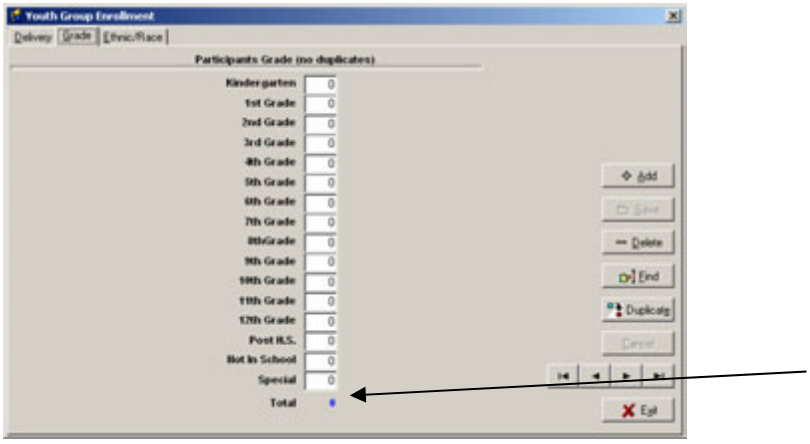
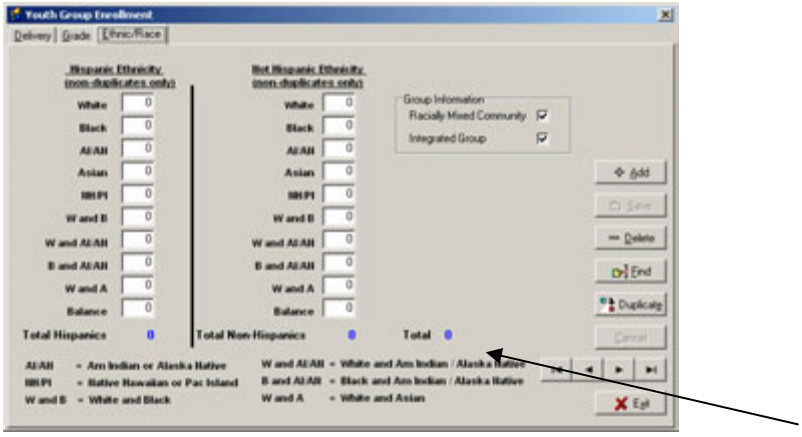
Page 2:



Page 3:



Group Volunteers –
Records can be added to this file to account for additional volunteer participation. Go **ES-237|Group Volunteers**. Group volunteer records can be used to count volunteers who have not previously been entered into the database, but have participated in such activities as fund raising, county fairs, trips, etc. The ***Club Code*** and ***Project Code*** fields are optional.

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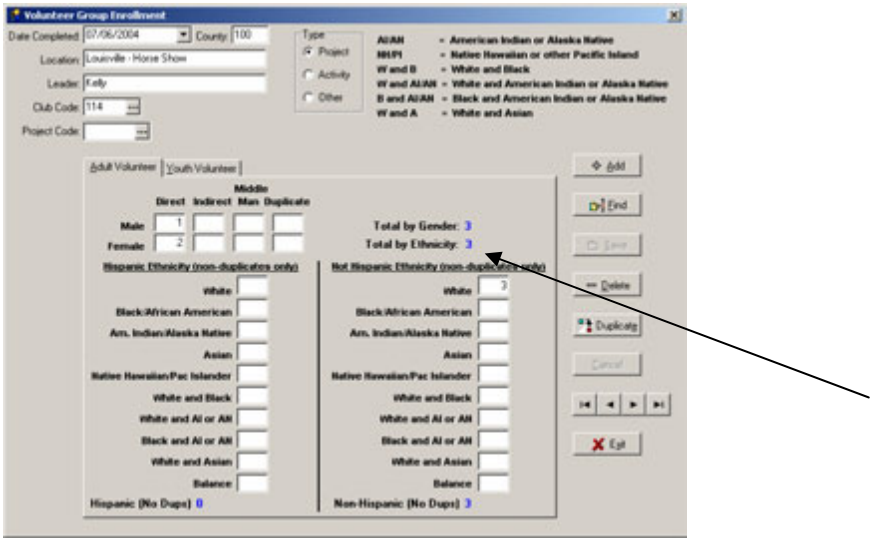
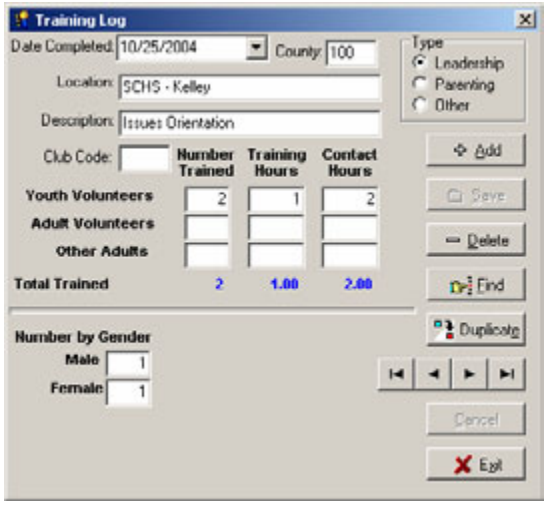


The participation numbers in the Group Volunteer records must balance by race and ethnicity.

Training Log –



All volunteer training activities are entered into the training log.
Go **ES-237|Training Log**. All training, which ultimately affects youth and has been conducted or facilitated by county extension staff, can be counted. The *Gender* information on the training record is optional.

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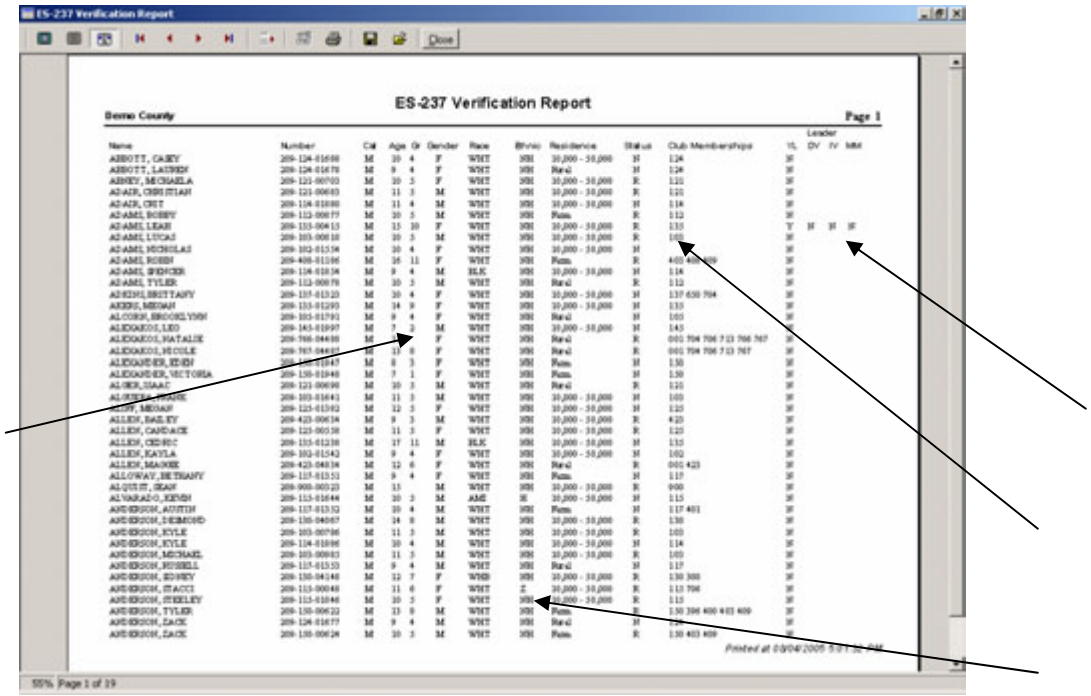
3. Verify Data:

Verification Report –
Print the Verification Report **(ES237|ES237 Verification)** to validate all member/leader records. Following is a list of items to check:

- The *Categories* of Members, Cloverbuds/Mini 4-H, and Special count in the membership totals on pages 1, 2, and 3 of the ES-237 report.
- All Members, Cloverbuds/Mini 4-H, and Special must have a valid grade, residence, ethnic designation, race, gender, and a valid club membership. A valid club membership means that they are enrolled in at least one club that has a valid *Delivery Mode. Not a Youth Group* does not count as a valid club membership.
- Members and leaders of *Status* New, Returned, and Terminated are counted on the ES-237 report.
- Project, General/Organizational, Activity, and Resource leaders count on the volunteer charts on pages 4, 5, and 6.
- All leaders must have a valid race and ethnicity.
- Ethnic designations can only be *H* or *NH* for Hispanic or Not Hispanic. Anything else in that column must be corrected on the member/leader record.
- If a member has a *Y* in the *YL* (Youth Leader) column, they must have at least one *Y* under *DV*, *IV*, or *MM* columns. This designates the *Leadership Type*.
- All adult leaders must also have at least one *Y* under *DV*, *IV*, or *MM* columns to designate *Leadership Type*.



Note the above errors:

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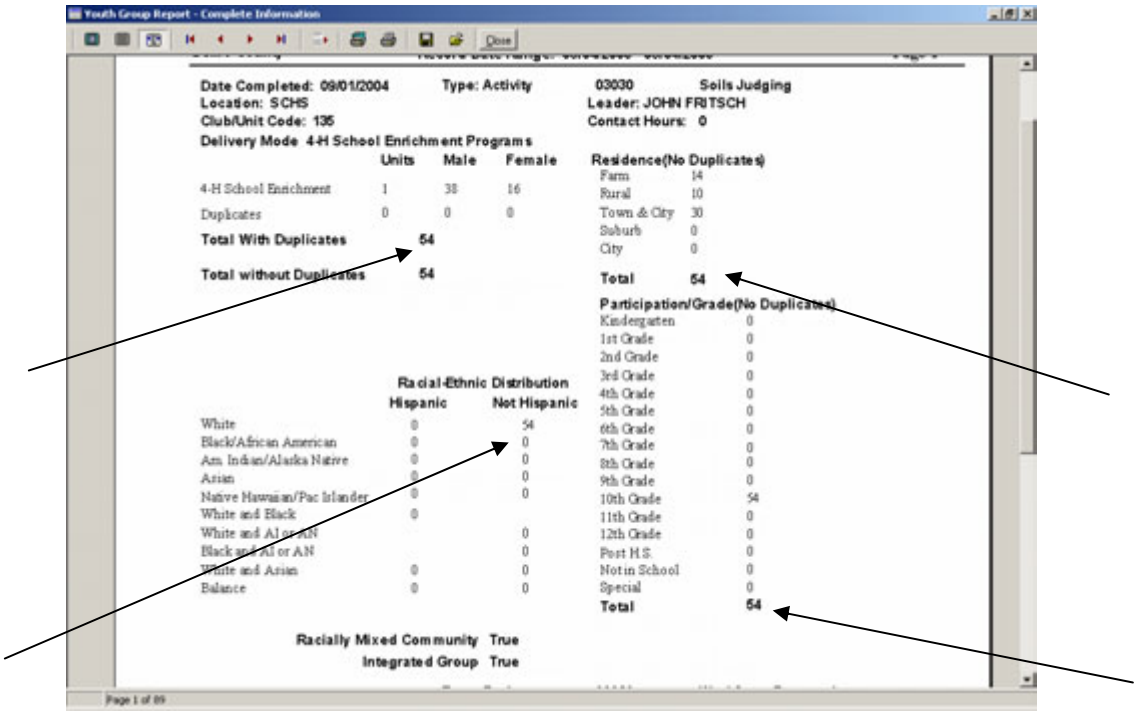
Group Youth Report –
Print the Group Youth Report **(ES237|Print ES237 Group Files|Youth Group Records)**. This report will assist you in checking each record for balanced numbers, correct integration designation, and project/activity assignment. Totals are printed at the end of the report.



Group Volunteer Report –
Print the Group Volunteer Report (**ES-237|Pint ES237 Group Files|Volunteer Group Records**). Verfiy the records that have been entered for additional youth and adult volunteers.

Training Log Report –
Print the Training Log Report **(ES-237|Print Training Log File**) to verify the training records.

4. Print the ES-237 Statistical Report:

Note: When previewing the report, it will open in a compressed mode. Select the 'maximize box' in the upper-right corner of the preview screen to display the report on the full screen.

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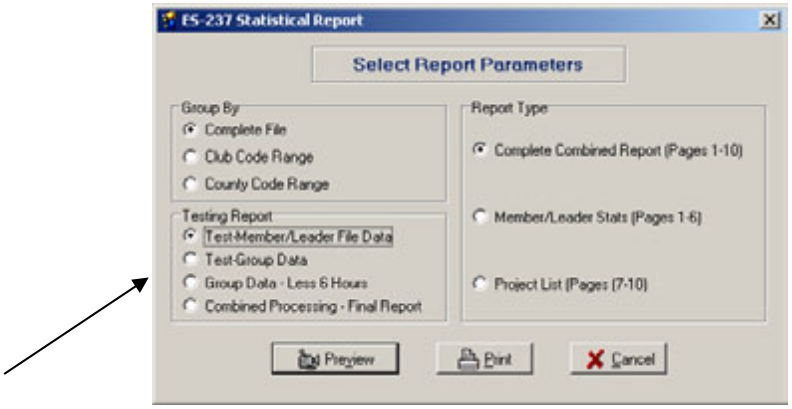
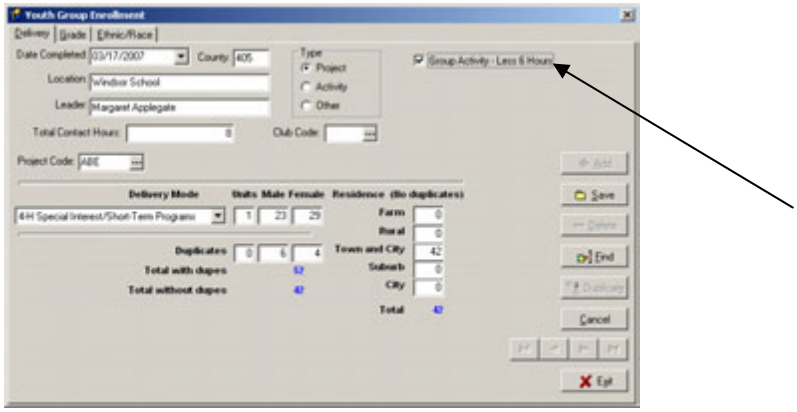


Test-Member/Leader Data –
This report style will accumulate all data from members and leaders that have been entered into the database as individual records. This report does not include any group records. Check for balanced numbers. Go to Step 5 for information on numbers that must balance. If numbers do not balance, go back to the master code reports and verification report to check for incomplete data. Balance the data on the Test Member/Leader Report before proceeding. If the report shows as unbalanced on the test version, it will not automatically balance on the final report. Balance each part and then print the final report.

Test-Group Data –
This report style will accumulate all data from the group records and training log. If the report numbers do not balance, check the group records for errors. If curriculum information does not seem to be correct on either Test Member/Leader or Test Group reports, check the associated project and activity codes in the master code files for valid ES-237 curriculum numbers. The Training Log information appears on Chart 16 of the ES-237 report.

Group Data – Less 6 Hours –



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This report will accumulate all data from group records that have been marked as '***Group Activity - Less 6 Hours'***. These activities do not qualify for ES-237 reporting, but are reported on this separate report for special state purposes.

Combined Processing - Final Report –
When both of the first two reports are balanced, print the final report **(ES237|ES237 Statistical Report|Combined Processing-Final Report).** This report should be balanced and the ES-237 reporting process is complete.

Note: The Combined-Final Report must be the last report printed before the ES-237 data files are sent to the state office. This report writes the final numbers to those data files. If you print one of the test reports and then copy the files to send to the state, you will only have partial data in the data files.

TO BE SAFE – Print the Final Report one last time, just before copying the files to send to the state.

5. Balanced Numbers:

Following are checkpoints for proofing your ES-237 report:
(Note: The member records that count on the ES-237 report are the Categories of Member, Cloverbuds/Mini 4H, and Special – M, C, S; with a Status of New, Return, and Terminated – N, R, T)

A. Total youth on **Lines 8 and 9** (page 1) must equal total youth on **I and K – Chart 13.1** (page 2).

1. **Chart 13.1 is lower – Possible cause** (check the following)
   a. Invalid Primary Club code. All members in the Categories of Member, Cloverbud/Mini 4H, or Special and with a Status of New, Returned, or Terminated must have the club listed as the Primary Club in the Club Membership list. (Refer back to page 4).

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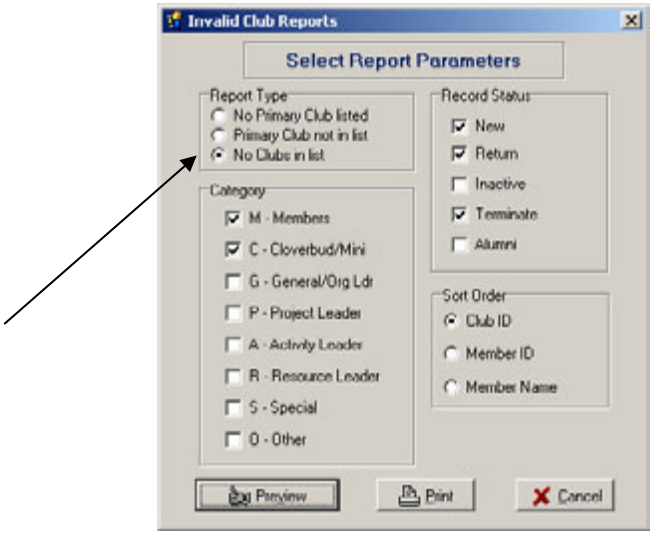
First Option:
Go **Reports|Special Reports|Invalid Club Reports**.



Print the various reports to determine member records that do contain errors. Correct these records.

Second Option:
Print the *ES-237 Verification Report*. Check the *Club Code* (middle section of the Member Code) under the *Number* column. This code must be a valid club code and must also be listed with that member in the Club Membership column.

b. Check that each Master Club Code record (**File|Club Codes**) has a ***VALID*** *Integration Status*. Member integration is determined by the integration status listed with his/her club memberships.

c. If the Group Records are not balanced, check the *Integration Status* on the ethnic/racial screen of each Group Youth Record.

2. Line 9 lower than Chart 13.1 – Possible Cause

a. If the number of Units or Total Youth is lower on Line 8 and 9 than on Chart 13.1 (I, J, K, and L), the *Delivery Mode* on a Master Club record is missing. (**Check Files|Club/Unit Codes**).

b. A *Gender Code* may be missing on a Member record. (Check by filtering the Member Query or checking the ES-237 Verification Report).

c. Group records may not have a *Delivery Mode* indicated. Check **ES-237|Group Youth Enrollments** to make sure a *Delivery Mode* displays with each record.

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B. Totals on **Line 9** (page 1) must equal the totals on **Chart 10 and Chart 11**.

1. If **Line 9** is less than **Chart 10** and/or **Chart 11**, each member must have a valid club membership. Those club memberships must have a valid *Delivery Mode*. The *Participation (Delivery Mode)* for each member is determined by the *Delivery Mode* designated in the Master Club Record of his/hers club memberships.

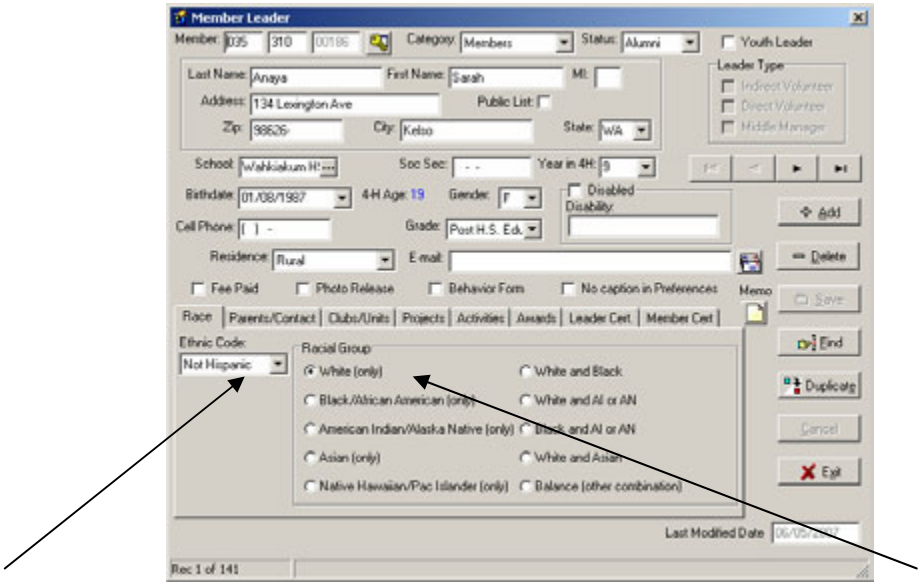
   Note: Lines 1 through 9 count members by Delivery Mode and Gender. If there is an error on this chart, those two factors are causing the error.

2. If the number of members on **Chart 10** is low, a member record is missing a valid grade. Check the ES-237 Verification Report or the Member Query.

3. If the number of members on **Chart 11** is low, a member is missing a valid residence designation. Check the ES-237 Verification Report or Member Query.

C. The totals **Line 9, Chart 10, Chart 11, and Chart 13.1** must match **Chart 13.2-Line 13.**

1. If the number on **Line 13 – Chart 13.2** is lower than **Line 9, Chart 10, Chart 11,** and **Chart 13.1**, check that each member has a valid ethnic and race designation. Check the ES-237 Verification Report or the Member Query.



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2. If Line **13 – Chart 13.2** is higher than **Line 9** on the first page, it is due to an invalid club membership. An invalid club membership will affect the numbers on **Line 9, Chart 10, Chart 11, and Chart 13.1**.

D. The total *Youth by Program Source* on **Chart 12** (page 2) must equal the grand total on **Page 10**.

1. If **Chart 12** is lower, check to make sure each project code has a valid *Program Source* indicated. (Refer back to Page 3).

2. If **Chart 12** is lower there could also be unlinked records in the project or activity files. To delete the unlinked records go **Utilities|File Utilities|Utilities – Delete Unlinked Project, Activity, Award, and Club Codes.** The indexes of these files could also be out of line with the databases. Go **Utilities|File Utilities**. Highlight *Youth2a.db, Youth2b.db, Youth2bl.db, Youth2c.db, and Youth2d.db*. Go **File|Recreate Indexes**.

3. If **Page 10** is lower, check to make sure each project code has a valid ES-237 curriculum code. (Refer back to Page 3). You may need to run the Unlink Utility or Recreate Indexes as in number 2 above.

4. If **Page 10** is double or triple the number in **Chart 12,** the *Youth2C3.db* and *Youth2C3.px* format file containing the Federal ES-237 codes is corrupted. Get a new copy of those files from your install CD or from the state support office.

E. If the adult volunteer count on **Chart 14.1** is too low.
Do all adult volunteers in the member/leader file have a valid leader type indicated? Volunteers are counted by *Leader Type*. If leaders have no *Leader Type* indicated, they will not count on the report. (Check this information by printing the *ES-237 Verification Report* or filtering the *Member Query* by Leaders and checking the Leadership Type of each leader.)

F. If the youth volunteer count (Youth Leaders) on **Chart 14.2** is too low.
Do all members marked as youth leaders in the member/leader file have a valid leader type indicated. Ninety-nine percent of the time they are *Direct Volunteers*. If they have no *Leader Type* indicated, they will not count on the report. (Filter the *Member Query by Youth Leader* and check the *Leader Type* information.)

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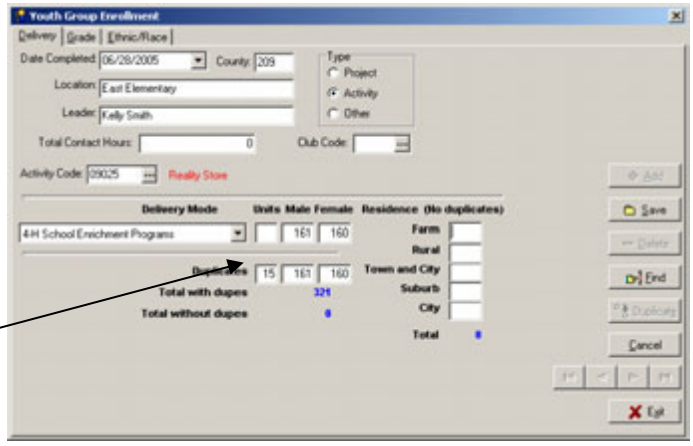
G. The number of *Units* on **Page 1** or Chart 13.1 (No Duplicates) is a negative number.



(**This screen is incorrect.)**

Duplicate units have been added to group youth records without entering a balancing number of units on the first line on the **ES-237|Youth Group Enrollments** record. (The number of duplicates will be larger than the total count of units, resulting in a negative number.)

H. Negative numbers in either the member or volunteer totals on **Line 9, Chart 13.1, Chart 14.1, or Chart 14.2.**
The number of duplicates is higher than the actual member or leader counts on *Youth* or *Volunteer Group* records. (Example: 10 participants entered with 46 duplicates. This results in a negative number of 36. The correct entry should be 56 participants with 46 of those counted as duplicates.)

I. Other Checks:

1. Training Log records do not print on the **Test-Member/Leader Report**. The *Training Log* is part of the group records and prints on the **Test-Group Report** and the **Final-Combined Report. (ES-237|ES-**237 Statistical Report). The *Group Volunteer, Youth Group Enrollments, and Training Log* are all group records and print on the **Test-Group Report**.

2. Invalid integer error on **Page 2** indicates a problem with the project or activity file. This error occurs when reading the project file for the *Program Source* information. Check for valid *Program Source* information in the *Master Project and Master Activity files.*

3. Error creating cursor handle when trying to preview or print the report. This can be caused by various problems such as missing data, missing tables, invalid indexes, not enough space on your PC drive, printer not communicating with the PC, etc.

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a. Close out of the program. Turn off the computer and printer. Restart the computer and then restart the printer. Try the report again.
b. Make sure you *Do Not* have any other programs, such as virus scans or screen savers, running in the background.
c. Check your data by using the information in **part 3** or these instructions – **Verify Data**.
d. Check with your network administrator (IS Department) to verify the you have sufficient hard drive space available to create the temp file for the report and that you have sufficient processor speed to process the report.

6. Submitting ES-237 information to the State 4-H Office:

Complete details for submitting data to the state office will be specifically outlined by each state. Follow the individual instructions that will be sent you by your state office.

a. Most states require you to zip up your entire Youth Enrollment database and submit it to the state office. This allows the state office to check your data carefully if there are errors.

Included in the above database are the following files:

b. Following are the ES-237 files that are submitted to the state to be merged for the ES-237 report.

ES237P1.db
ES237P2.db
ES237P3.db
ES237P4.db

c. Following are the data files that are merged to create a complete state database.

Youth2a.db	Member/Leader File
Youth2b.db	Parent/Contact File
Youth2bl.db	Parent/Contact Link File
Youth2d.db	Member Project File
Youth2h.db	Member Activity File
Youth2m.db	Group Volunteer File
Youth2n.db	Group Youth File
Youth2l.db	Group Training Log

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