

Section 7: End of Year Processes & Starting New Reporting Period

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Verify Accuracy and Completeness of Data (EFNEP & SNAP-Ed)

At the end of the year, it is important to review your data prior to submission (EFNEP only) or prior to setting up your regions in the new year (EFNEP & SNAP-Ed). This will ensure that data is accurate and complete and that errors do not carry forward into the new year. Steps for Region and Institute Level users are outlined below.

Steps for Region Level Users


1. Log in as a Region Level user
2. Confirm that all data is entered, accurate, and complete
3. If a Staff member left mid-year – prior to exiting some of his/her adults and youth groups, make sure to terminate them.




If the adults or youth groups of the staff person who left mid-year were transferred to another staff member, you can skip this step!

4. Delete any outdated volunteers from the system.
5. Correct Adult, Youth Group, and Staff Errors.


View Adult Errors

- a. If there are adults listed, complete steps 'b' through 'e'. [If not, skip View Youth Errors.](#)
- b. Review the error type
- c. Click the “” icon to open the adult record
- d. Fix the issue(s)
- e. Click “**Save**” to save the changes you made or “**Cancel**” to exit the record without saving
- f. Repeat steps 'b' through 'e' for all adults on the Adult Errors page

View Youth Errors

- a. If there are youth groups listed, complete steps 'b' through 'e'. If not, [skip to View Staff Errors.](#)
- b. Review the error type
- c. Click the “” icon to open the youth group record
- d. Fix the issue(s)
- e. Click “**Save**” to save the changes you made or “**Cancel**” to exit the record without saving
- f. Repeat steps 'b' through 'e' for all youth groups on the Youth Errors page

View Staff Errors

- a. If there are staff listed, complete steps 'b' through 'e'. If not, skip to step #4.
- b. Review the error type
- c. Click the “” icon to open the adult record
- d. Fix the issue(s)
- e. Click “**Save**” to save the changes you made or “**Cancel**” to exit the record without saving
- f. Repeat steps 'b' through 'e' for all staff on the Staff Errors page



Note:

All relevant Adult, Youth, and Staff errors should be fixed; any listed that are not actually errors can be skipped. Having errors listed on the View Adult/Youth/Staff Errors pages will not prevent you from submitting your data (EFNEP only) or prevent you from setting up your regions in the new reporting year (EFNEP & SNAP-Ed).



SNAP-Ed:

For example, a SNAP-Ed user may get an error that a person is marked as graduated without an entry and exit recall, but that may not be a requirement for SNAP-Ed.

6. Complete any additional steps as required by your Institute

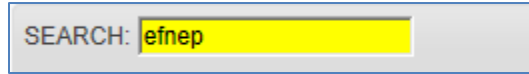
Steps for Institute Level Users

1. Work with Region Level users to make sure the [Steps for Region Level Users](#) are complete
2. Log in as an Institute Level user
 - a. Click on “**Browse Adult Summary**”



The screenshot shows a web interface with a 'Browse' section. Under the 'Adult' category, there are three buttons: 'Browse Adult Summary', 'Browse Adult Diet Summary', and 'Browse Adult Checklist Summary'. A red arrow points to the 'Browse Adult Summary' button. Below the 'Adult' section is the 'Youth' section with two buttons: 'Browse Youth Summary' and 'Browse Youth Checklist Summary'. At the bottom is the 'Staff' section with one button: 'Browse Staff Summary'.

- b. Type EFNEP (or SNAP-Ed) in the search box to filter the results by program

A screenshot of a search interface. It features a light gray rectangular box with a thin blue border. Inside the box, the word "SEARCH:" is in a small, dark font, followed by a yellow rectangular input field containing the text "efnep" in a dark font.

- c. Confirm that the “**# of Adults**” for each region look accurate
d. Return to the **Home Screen**

3. Click on “**Browse Adult Diet Summary**”
- Repeat steps ‘a’ through ‘d’ (above)
 - For step ‘c’, confirm “**# of Adults with Entry & Exit Recalls**” look accurate
4. Click on “**Browse Adult Checklist Summary**”
- Repeat steps ‘a’ through ‘d’ (above)
 - For step ‘c’, confirm “**# of Adults with Entry & Exit Checklists**” look accurate
5. Click on “**Browse Youth Summary**”
- Repeat steps ‘a’ through ‘d’ (above)
 - For step ‘c’, confirm “**# of Youth**” look accurate
6. Click on “**Browse Youth Checklist Summary**”
- Repeat steps ‘a’ through ‘d’ (above)
 - For step ‘c’, confirm “**# of Youth with Entry & Exit Checklists**” look accurate
7. Click on “**Browse Staff Summary**”
- Repeat steps ‘a’ through ‘d’ (above)
 - For step ‘c’, confirm “**# of Professionals**”, “**# of Paraprofessionals**”, “**# of Volunteers**” look accurate

Data Submission (EFNEP Only)

This section is for EFNEP users only. SNAP-Ed data is submitted to the Food and Nutrition Service (FNS), not NIFA and thus SNAP-Ed users can skip this section. They should follow FNS’ protocol for end of year data submission.

Deadline

Each year, EFNEP data must be submitted to the National Institute of Food and Agriculture (NIFA) via WebNEERS on or before **November 1st**. This is done by Institute Level users.

Submit Data

The steps below explain how to submit your institution's EFNEP data to the Federal Office. The Federal Office cannot access your data until you complete these steps. Please make sure [Region](#) and [Institute Level](#) users verify the accuracy and completeness of data prior to submission.

Data submission sends forward adult, youth group, and staff data (minus personally identifiable information), not the Annual Update or the Budget/Budget Justification. The submission process for those items is completely separate. **See Section 8 - Annual Update and 5-Year Plan** and **Section 9 – Budget and Budget Justification**.



Note:

In the Nutrition Education Evaluation and Reporting System version 5 (NEERS5), our previous system, there was a complicated import/export process for data submission. This process is no longer necessary. In WebNEERS, regional data is always visible at the [Institute Level](#) and even though the Institution still has to submit its data to the [Federal Level](#) the process is much easier!

1. Log in as an [Institute Level](#) user
2. Click on “**Manage Reporting Years**”
3. At the top, under **Active Reporting Year**, confirm that the year you wish to submit is listed in the “**Year**” column

Options	Year	Start Date	End Date	Status
	2013	10/1/2012	9/30/2013	Not Submitted

- If not, use the year dropdown next to the name of your university (on the top right of your screen) to select the appropriate year and click “**OK**” to confirm that you want to switch to a different year

Online Help Desk WebNEERS Manuals @gmail.com (Institute User) 26:19 Logout

2013



Note:

The screenshots above show “2013” as an example. However, you should select the year you are required to submit. If you are unsure which year to submit, contact the [help desk](#)

4. Click the “ ” icon to open the Active Reporting Year

5. Click on the “**DATA SUBMISSION**” tab



6. Click the “**Submit for Federal Review**” button

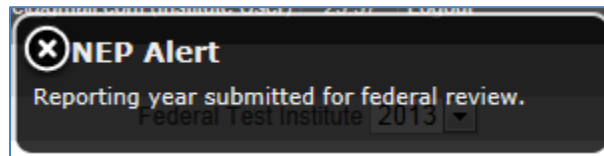


*If you see a message on the “**DATA SUBMISSION**” that that says, ‘You must make this reporting year active in order to submit it’, click the “**Cancel**” button to return to the **Manage Reporting Years** screen and follow the steps above to make the year you want to submit active*

7. Click “**OK**” to submit the data or “**Cancel**” to cancel the submission

Successful Submission

- If your submission was successful, you will get an EFNEP Alert indicating that your reporting year was submitted, you will be returned to the Manage Reporting Years screen and the “**Status**” column will say “**Pending Review**”.

A screenshot of the 'Active Reporting Year' table. The table has columns: Options, Year, Start Date, End Date, and Status. The 'Status' column for the year 2013 is highlighted with a red oval and shows 'Pending Review'.

Options	Year	Start Date	End Date	Status
	2013	10/1/2012	9/30/2013	Pending Review

At this point, regional data for the year you submitted is locked. Region Level users can still run reports and add/edit subgroups, filters, public assistance programs, and defaults, but they cannot add/edit adults, youth groups, or staff.

Adults, youth groups, and staff in the reporting year you submitted will only be unlocked if:

- [the data submission is cancelled](#)
- [the data is marked as “Needs Revision” by the Federal Level user](#)


Adults, youth groups, and staff in the new reporting year (new ones or those that are carried forward) cannot be added or edited until the region has been setup for the new reporting year.



Note:

*Region Level users may still be able to add/edit the **Delivery Sites/Partnerships** chart and **Program Impacts** because those are part of the Annual Update section which is completely separate from the adult, youth group, and staff data in terms of submission/migration.*

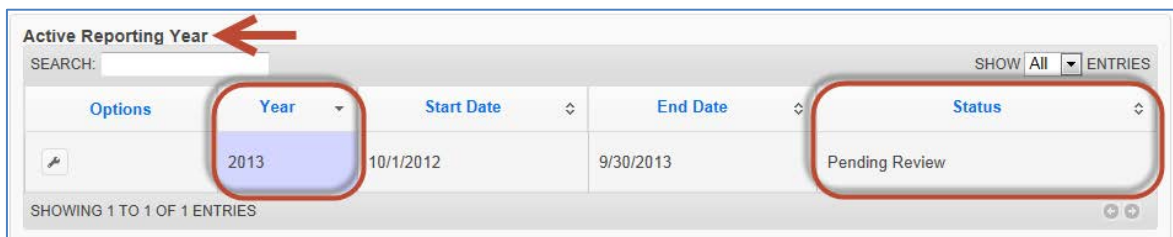
Failed Submission


- If your submission failed, you will get a red alert message on the top right of your screen. If this happens, click on the “” icon and try again. If you continue to receive errors, contact the [help desk](#).

Cancel Data Submission

If your data submission has a status of “**Pending Review**”, you can cancel the submission. This may be useful if you submit and then find an error that needs to be corrected.

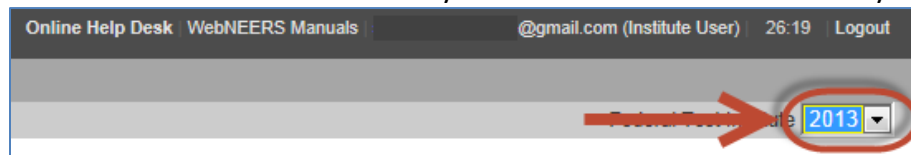
1. Log in as an Institute Level user
2. Click on “**Manage Reporting Years**”
3. Under **Active Reporting Year**, confirm that the year you wish to cancel your data submission for is listed in the “**Year**” column and that your status is “**Pending Review**”



Active Reporting Year				
SEARCH: <input type="text"/>				
Options	Year	Start Date	End Date	Status
	2013	10/1/2012	9/30/2013	Pending Review


SHOWING 1 TO 1 OF 1 ENTRIES

- If the wrong year is active, use the year dropdown next to the name of your university (on the very top right of your screen) to select the appropriate year and click “**OK**” to confirm that you want to switch to a different year



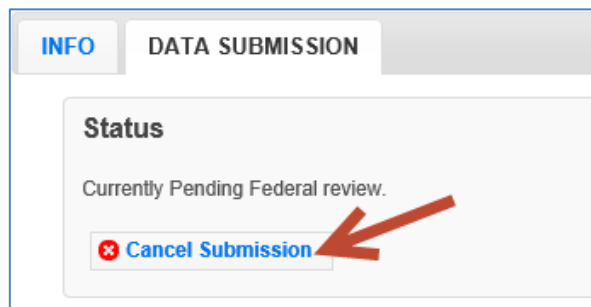
Note:

*The screenshots above show “**2013**” as an example. However, you should select the year you want to cancel the submission for.*

4. Click the “” icon to open the Active Reporting Year
5. Click on the “**DATA SUBMISSION**” tab



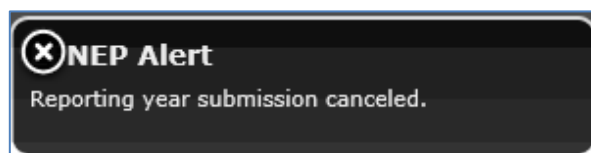
6. Click the “**Cancel Submission**” button to cancel the submission



Note:

The **Cancel Submission** button will only be visible if the plan is still “**Pending**”; you cannot cancel a submission if the status is “**Under Review**”, “**Needs Revision**” or “**Approved**”.

7. Click “**OK**” to confirm that you want to cancel the submission
8. Watch for an alert message at the top right confirming that it was successful



At this point, regional adult, youth group, and staff data is unlocked and Region Level users can make edits, as needed

9. When all updates are complete, follow the steps in the [Submit Data](#) section to resubmit your data.

Submission Status

After you submit your data to the Federal Office, the status will be marked as one of the following:

- **Pending Review:** This status indicates that you have submitted your data, but the Federal Office has not reviewed it. Data submission can still be cancelled at this point.

- **Under Review:** This status indicates that the Federal Office has done an initial review of your data and has given you permission to Start the New Reporting Period. They will or are in the process of a more thorough review
- **Needs Revision:** This status indicates that the Federal Office has reviewed your data and discovered one or more issues. Your data needs to be revised and resubmitted.
- **Approved:** This status indicates that the Federal Office has reviewed your data and has approved it. No further action is needed.


Revise/Resubmit Data

If your data submission is marked as “Needs Revision”, you need to determine the issue(s), have your Region Level users make revisions, and resubmit the revised data. Instructions are below.



*As soon as the Federal Level user marks your data as “**Needs Revision**”, the Region Level data entry screens for that year are unlocked. This allows the Region Level users to add/edit adults, youth groups, and staff, as needed.*

Determine the Issue(s)

1. Log in as an Institute Level user
2. Click on “**Manage Reporting Years**”
3. Click the “” icon to open the Reporting Year that is marked as “Needs Revision”



*The reporting year that “Needs Revision” may be in the **Active Reporting Year** or the **Non-Active Reporting Years** section*

4. Click on the “**COMMENTS**” tab to determine why your data was marked as “Needs Revision”

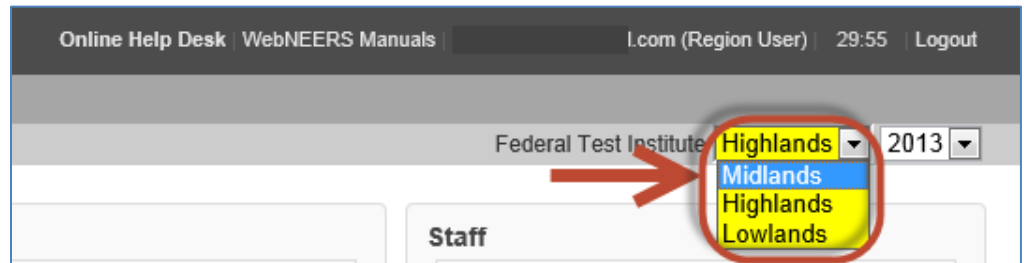


If any of the revision requests are unclear, contact the [help desk](#).

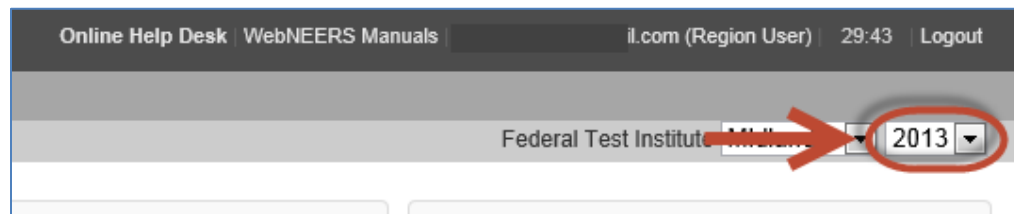
Make Revisions at Region Level

After you determine the issues, you need to work with your Region Level users to make revisions. These are the steps they need to complete.

1. Log in as a Region Level user
2. At the top, confirm that the correct region is selected
 - If not, use the region dropdown to select the appropriate region



3. At the top, confirm that the previous reporting year is selected
 - If not, use the year dropdown to select the appropriate year and click "OK" to confirm that you want to switch to a different year



Note:

This screenshots show "2013" as an example. However, you should select the year you are required to revise.

4. Make revisions to adults, youth groups, and/or staff, as needed
5. When you are done making revisions, notify the Institute Level user
6. If you changed the year to make revisions, make sure you use the year dropdown to return to the appropriate year before entering additional data

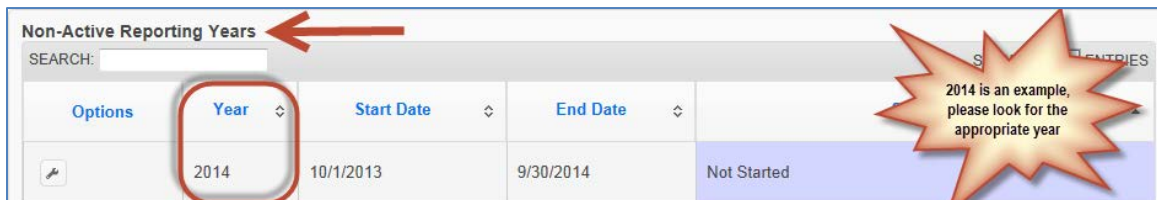
Resubmit the Revised Data


1. Log in as an Institute Level user
2. Follow the steps listed in the [Submit Data](#) section above to resubmit the revised data.

Start a New Reporting Period (EFNEP & SNAP-Ed)

The Start a New Reporting Period process allows the Institute Level users to create a new year and to give their regions the ability to move into the new year/migrate their data forward. This is a multi-step process and it is important to note that completing the steps at the Institute Level does not setup the regions for the new year. The Region Level users must complete the steps outlined in the [Setup Regions in New Reporting Year](#) section to setup their new year and to migrate their data forward.

1. Log in as an Institute Level user
2. Click on “**Manage Reporting Years**”
3. At the bottom, under **Non-Active Reporting Years**, confirm that the year you wish to start is listed in the “**Year**” column



Non-Active Reporting Years				
SEARCH: <input type="text"/>				
Options	Year	Start Date	End Date	
	2014	10/1/2013	9/30/2014	Not Started

EFNEP users:

- The new reporting year will not be visible until the Federal Level user has done an initial review of your data for accuracy and completeness. This will typically occur within 2 weeks of submission. If the new reporting year is not visible by November 20th, contact the [help desk](#) for assistance.

SNAP-Ed users:

- The new reporting year will be granted around the start of the new fiscal year. If the new reporting year is not visible by October 10th, contact the [help desk](#) for assistance.

4. Click the “” icon to open the Non-Active Reporting Year you wish to start
5. Click on the “**CREATE NEW REPORTING YEAR**” tab



6. The **CREATE NEW REPORTING YEAR** tab will show a list of your Institute's current regions. For the new reporting year, if you want to include:
- All existing regions, click **"Select All"**, to automatically check the box for every region
 - Some existing regions, check the boxes next to the regions you want to move forward; leave those you don't want to move forward unchecked
 - None of the existing regions, i.e., you want to start from scratch, leave all boxes unchecked



Tip:

The 'some' and the 'none' option can be used to prevent regions from moving forward until you are ready for them to do so.

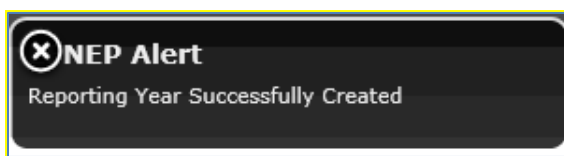
7. Confirm that selections are correct and click **"Begin Reporting Year"**



Note:

If you omit a region that needs to move forward, you can add it later, but if you include a region by mistake, you will not be able to remove it using this process

8. You will get an alert message that the reporting period was successfully started and the **"DATA SUBMISSION"** tab will appear



9. If you need to add additional regions complete the following. If not, skip to step #10.
- Click on the “**CREATE NEW REPORTING YEAR**” tab
 - Check the box for the region(s) you want to add
 - Click the “**Add Selected Regions**” button

Note:

*You can only add additional regions if the Reporting Year is in the “**Non-Active**” section of the **Manage Reporting Years** screen. If you click on the “**CREATE NEW REPORTING YEAR**” tab and see a message that says ‘In order to migrate regions into this reporting year, you will need attach your user to the XXXX reporting year and return to this screen’, use the year dropdown on the top right of the screen to select the year listed in the message. This will allow you to complete step #9 by making the year you need to make changes to “**Non-Active**”.*

10. Click the “**Make Active Reporting Year**” button to move the Institute Level user into the new reporting year
11. Click “**OK**” to confirm that you want to switch to a different year
12. Confirm that the new reporting year is listed as the “**Active Reporting Year**” on the **Manage Reporting Year** screen

Options	Year	Start Date	End Date	
	2014	10/1/2013	9/30/2014	Not Submitted

SHOWING 1 TO 1 OF 1 ENTRIES

Note:

Institute Level and Region Level users do not have to be attached to the same year at the same time. The system is set up to accommodate users being attached to different years. Users can also move back and forth between years at any time

13. If needed, **Add New Regions**

Note:

*If you need to edit a region, click “**Manage Regions**” and then click the wrench icon next to the region you need to edit. Any edits you make will be saved in real time. There is no save option in the Manage Regions section.*

Add New Region(s)

- Click **Add Region**
- Enter **Region Name**
- Click “**Add**”

- iv. Click "**Manage Counties**" to select counties from your state/territory to include in the new Region

Region - Montgomery County

ID
7

Title

Update Region Title

Counties

[Manage Counties](#)

- v. Check the box in the **Selection** column to select the appropriate county or counties
- vi. Click **OK** to save the selections or **Cancel** to exit without saving
- vii. Use the other tabs to customize the region as needed. See **Section 3: Setup – Customizing WebNEERS to Meet Local Needs** for details.

14. If needed, customize options for the upcoming year

Update Subgroups, Filters or Public Assistance Programs

See **Section 3: Setup - Customizing WebNEERS to Meet Local Needs**

Update Additional Checklist Question Sets

See **Section 5: Manage Adults** for adult question sets

See **Section 6: Manage Youth** for youth question sets


Give Region Level Users Permission to Migrate Data

Once your new reporting year is setup, you need to give Region Level users permission to migrate data. Only Region Level users with permission #150, "Migrate Region Data", have the ability to migrate data from one year to the next. This allows you to control who can complete this process. Please follow the steps below to give permission #150 to the Region Level users you want to be able to migrate data.



Note:

DATA MIGRATION is the process WebNEERS completes when it reviews your existing database, removes those records that are only part of the previous year, and moves those records that are part of the new year into the new reporting year's database.

1. Log in as an Institute Level user
2. Click on **View Users**
3. Click the “” icon for the Region Level user to whom you want to give the “**Migrate Regional Data**” permission
 - a. Search for permission #150 and check the box to grant the user that permission
 - b. Scroll to the bottom and click save
4. Repeat step #3 for all Region Level users you want to give permission to migrate regional data

Setup Region(s) in the New Reporting Year (EFNEP & SNAP-Ed)

After the Institute Level successfully starts the new reporting year, he/she should work with Region Level users to setup their regions. This is multi-step process only needs to be completed once per year per region. This means only one user per region needs to complete the steps below each year.

Part I: Migrate Data

Data Migration is the process WebNEERS completes when it reviews your existing database, removes those records that are only part of the previous year, and moves those records that are part of the new year into the new reporting year’s database. *So, for example, if you created the FY2014 database, the migration process would remove those adults and youth groups that exited the program on or before 09/30/2013 and it would carry forward those who entered the program or who exited the program 10/01/2013 or later.*

The following data migrate forward:

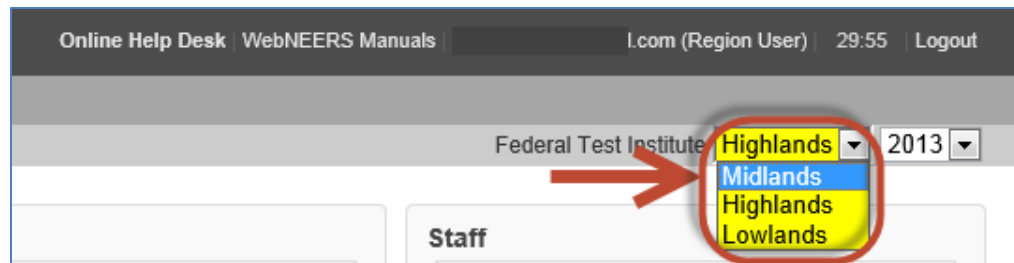
- Adults who are part of the new year, including their recall and checklist data
- Youth groups which are part of the new year, including their checklist data
- Region Level subgroups, filters, public assistance programs, and defaults

Existing staff and volunteers as well as Institute Level subgroups, filters, public assistance programs, and additional checklist question sets are available to the region as soon as the Institute Level user completes the steps to include the region as part of the new reporting year. This means Region Level users can access certain items whether they complete the steps for migration or not.

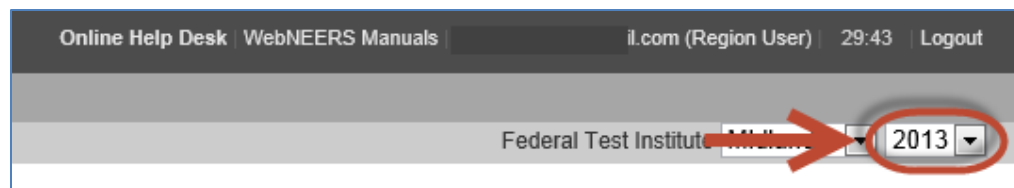


*You can skip **Part I** if you do not wish to bring any regional data (adults, youth groups, subgroups, filters, public assistance programs, defaults) forward from the previous year or if an Institute Level user has asked you to wait to migrate your data until the previous year’s data has been approved by the Federal Office (EFNEP only).*

1. Log in as a Region Level user
2. At the top, confirm that the correct region is selected
 - If not, use the region dropdown to select the appropriate region



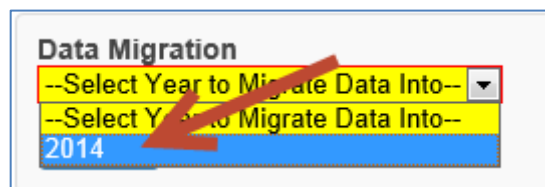
3. At the top, confirm that the previous reporting year is selected
 - If not, use the year dropdown to select the appropriate year and click “OK” to confirm that you want to switch to a different year



Note:

This screenshot shows “2013” as an example. However, you should select the year you just completed

4. On the home screen, under “**Data Management**” click the “**Migrate Data**” button. If the “**Migrate Data**” button is grayed out, you do not have permission to migrate data. Notify your Institute Level contact and ask him/her to give you permission to migrate
5. In the dropdown under “**Data Migration**” select the year you want to migrate your previous year’s data into



Note:

This screenshot shows “2014” as an example. However, you should select the new reporting year. If you are unsure what it is, ask your Institute Level contact.

- If the screen says “There are no reporting years that you can migrate this region data into at this time” or if the year isn’t listed in the dropdown, notify

your Institute Level contact and ask him/her to give you permission to move into the new year.

- If the year is listed, but it says “**Already Migrated**” the migration for this region has already been completed, skip to [Part II](#)



Note:

***Note:** data migration can only be completed once per region*

6. Click on the “**Migrate**” button



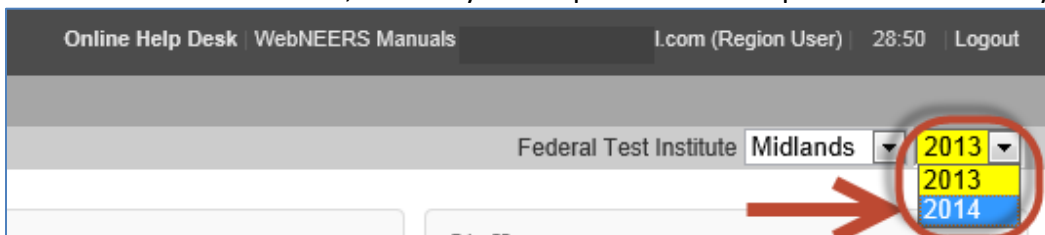
Note:

*The migration process can only be completed once. Therefore, **it is important to make sure your previous year’s data is accurate and complete before confirming the migration.***

7. Click “**OK**” to start the migration or “**Cancel**” to cancel it
8. After the Migration is complete, you will see a **Migration Report**.
9. If any items were unsuccessful, notify the [help-desk](#). In your message, be specific about which region had migration errors and what the migration errors were.
10. At the bottom of the screen, click the “**Return to Home Screen**” button
11. To migrate additional regions, repeat steps #2 through #9. Make sure you do this before moving on to **Part II**

Part II: Move into the New Reporting Year

1. From the home screen, use the year dropdown at the top to select the new year



Note:

*This screenshot shows “**2014**” as an example. However, you should select the year you want to move into.*

1. Click “**OK**” to confirm that you want to switch to a different year



Note:

*If you get a message that the region you selected is not part of the new year, click “**OK**” or “**Cancel**” to continue and then notify your Institute Level contact and request permission to move into the new year*

2. If you migrated your data in **Part I**:
 - a. Click on “**Manage Adults**” and confirm that your adult data transferred properly. *If not, make a note of what is wrong with your data and notify your Institute Level contact. He or she can contact the [help-desk](#), if needed.*
 - b. Click on “**Manage Youth Groups**” and confirm that your youth group data transferred properly. *If not, make a note of what is wrong with your data and notify your Institute Level contact. He or she can contact the [help-desk](#), if needed.*
 - c. Click on “**Manage Staff**” and delete any staff and volunteers who are no longer part of the program.



*A staff person cannot be deleted if he/she has any adults, youth groups or volunteers associated with him/her. Use the transfer responsibilities option to quickly transfer adults, youth group and volunteers of a staff person who left to an active staff member (see **Section 4: Managing Staff** for details.)*



If you did not migrate your data, you can do so later by following the process above in [Part I](#) to combine any newly entered data with data that migrates forward.

New Reporting Period Information

At this point, the region setup for the new reporting year is complete.

1. Region Level users can add:
 - new adults
 - new youth groups
 - new staff
2. Region Level users can edit:
 - migrated adults
 - migrated youth groups
 - migrated staff.



*Instructions on the regional system, are available in **Section 4: Managing Staff**, **Section 5: Managing Adults**, and **Section 6: Managing Youth**.*

3. Region Level subgroups, filters, public assistance programs, and defaults from the previous year should be available for use as well as any Institute Level subgroups, filters, public assistance programs, and additional checklist question sets.
4. The **Delivery Sites/Partnerships** chart will be zeroed out
5. The **Program Impacts** from the previous year will be removed.

Access Previous Year Data and Reports

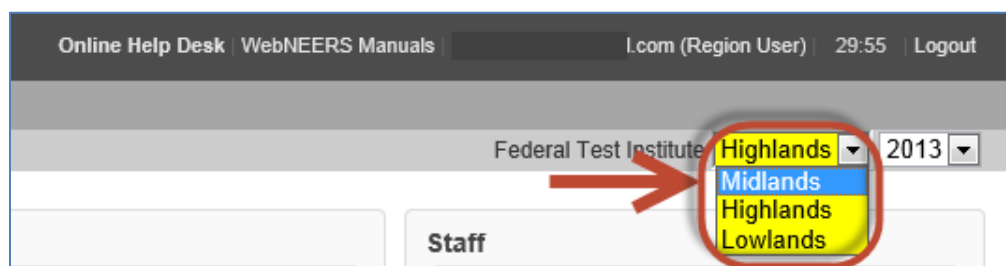
At any point, Institute Level and Region Level users can return to a previous year to download their data export files or to view/print reports. Instructions are below.

Note:

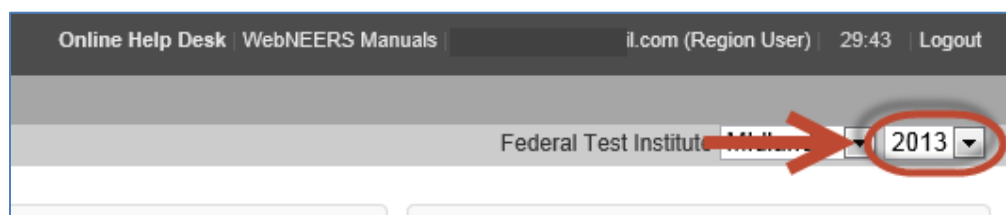
Institute Level and Region Level users do not have to be attached to the same year at the same time. The system is set up to accommodate users being attached to different years. Users can also move back and forth between years at any time.

Steps for Region Level Users

1. Log in as a Region Level user
2. If needed, use the region dropdown to select the appropriate region



3. Use the year dropdown next to the name of your university (on the top right of your screen) to select the appropriate year and click “OK” to confirm that you want to switch to that year



Note:

The screenshots above show “2013” as an example. However, you can select any year you wish to return to.

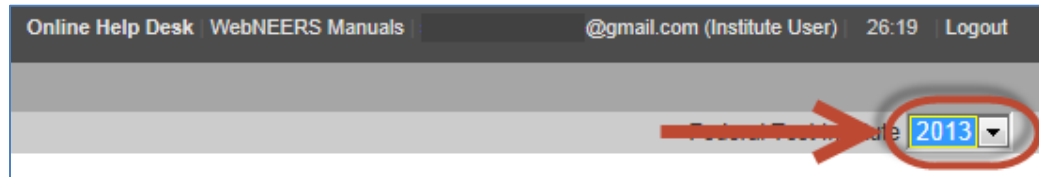
4. Download data export files or view/print reports, as needed
5. Use the year dropdown next to the name of your university (on the top right of your screen) to return to the current year to ensure that new data is entered into the correct database

SNAP-Ed:

SNAP-Ed data is not submitted so previous year data is not locked. Therefore it is really important to make sure step #5 is completed, otherwise Region Level users run the risk of entering data into the incorrect database.

Steps for Institute Level Users

1. Log in as an Institute Level user
2. Use the year dropdown next to the name of your university (on the top right of your screen) to select the appropriate year and click “OK” to confirm that you want to switch to that year



Note:

The screenshots above show “2013” as an example. However, you can select any year you wish to return to.

3. Download data export files or view/print reports, as needed
4. Use the year dropdown next to the name of your university (on the top right of your screen) to return to the current year to ensure that you are attached to the correct database

Note:

It is important to make sure step #4 is completed, otherwise Institute Level users will not be able to preview and manage the current year’s data, users and other reporting.