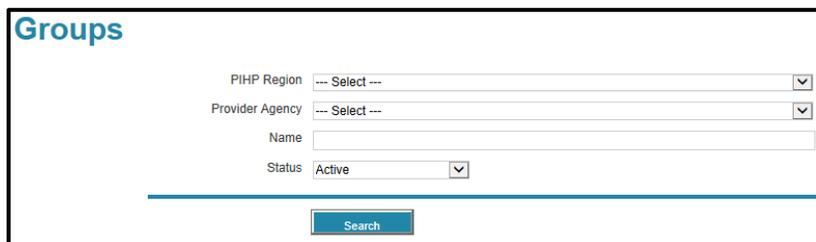# Group "Close Out" Protocol

1. Entry and Group Closure - All fiscal year (FY) activity (October 1 - September 30) is to be entered and groups closed or made "inactive" at the end of every FY. This applies to all group types - "One-Time", "Ongoing-Sequential" and Ongoing-Other". *Helpful Hint:* Your PIHP Region will provide you with dates for completion.
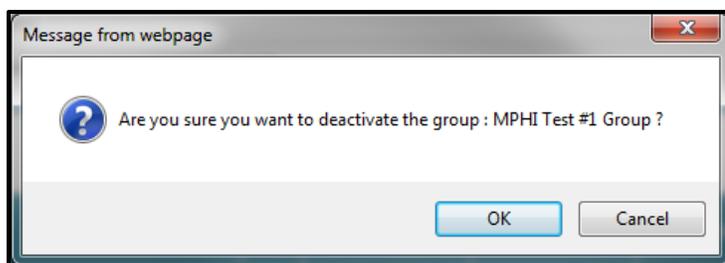
   - *Example:* School-based ongoing-sequential group that starts in September will need to be closed out September 30th. Recreate the group for the new FY by renaming the group and entering activity data October 1 and forward for the remaining year. Enter a note that the group started in September but was closed for the end of the FY in notes section.

   - Changing groups from "active" to "inactive" can be accomplished by clicking on the Group tab and selecting the Status: "Active" and Search.

   - On the far right of the each group line item there is a "Status" Column indicating if the group is "Active" or "Inactive". In the column to the left of the Name there is a "Thumbs Down" Icon. *Helpful Hint:* Do not click on the red **X** unless your intention is to permanently delete that group (entered in error, a duplicate etc.).

   - Clicking on the "Thumbs Down" Icon will prompt the message "Are you sure you want to deactivate this group?"

   - Once deactivated, you can locate the group by clicking on the Group tab and selecting the Status: "Inactive" or "All" (follow the steps above). The group will appear on both the "Inactive" and "All" Status lists. If needed you can reactivate an inactive group on the inactive list by clicking on the" Thumbs Up" Icon for that group.

2. **Record Review/Data Integrity** - FY records must be reviewed for accuracy and any errors must be corrected. *Helpful Hint:* If you have questions or concerns, contact your PIHP Region contact.

3. **Inactive Groups** – Completed FY groups in the "Inactive" group list should be checked to make sure that the "Attendees completing" field has been filled in, applicable to the last activity date of each completed – end of series or each one-time event.