



During your Year End Rollover, CRS will also purge fields within your SubFinder system that are no longer active. Prior to having CRS complete your Year End Rollover please refer to this checklist to ensure the fields will purge properly.

Employees:

- Inactivate any employee that is no longer active.

Substitutes:

- Inactivate any substitute that is no longer active.

Sites:

- Inactivate any site that is no longer active.
- Remove the site from any SubCast profile.
- Remove the site from any site group.
- Remove the site from any employee's home site.
- Remove the site from any substitute's home site.

Job Positions:

- Inactivate any job position that is no longer active.
- Remove the job position from any position group.
- Remove the job position from any employee's primary position.
- Remove the job position from any employee's secondary position.

Calendar Tracks:

- Inactivate previous years in the calendar track that are no longer active.
- Remove the calendar track from any active employee.
- Remove the calendar track from any SubCast profile.
- Remove the calendar track from any Data Exchange Pro import or export profile.

Site Groups:

- Inactivate any site group that is no longer active.
- Remove the site group from any SubCast profile.
- Remove the site group from any substitute's home site.
- Remove all current sites from the inactive site group.

Job Position Groups:

- Inactivate any job position group that is no longer active.
- Remove the site group from any substitute's home site.

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