

DISMISSING & RE-ENROLLING CLIENTS



A FEW NOTES BEFORE YOU GET STARTED:

- A client document showing enrollment date, client information and demographics can be printed from the detailed report in ETO.
- The Client List report has a start date which corresponds to the enrollment date for the client. This provides a snapshot of individuals and can be filtered by specific dates to determine most current enrollments.
- Please remember that individuals data entered into the CWF can be pulled over for YES participants – this data does not have to be double entered, with the exception of placements.
- A new report is being currently developed which will provide a snapshot of the entire list of YES participants who are enrolled for your organization.

To Dismiss A Client

ETO™ software **EmployIndy**
GUIDING MARION COUNTY'S WORKFORCE

New Quick Search To Do List My Favorites My Dashboard Reporting Dashboard

Enter Search Term(s) within Participant in Youth Employment Services Search

There are no recent TouchPoints for this participant.

Participant Information

Ima Test

FirstName: Ima
LastName: Test
Address1: 123 Anywhere street
Address2: apt 1
EMail: Imatest@gmail.com
CaseNumber: 270697
DOB: 10/6/1981
Age: 37 years
HomePhone:
CellPhone: (123) 214-5978
[View/Edit Participant](#)

14 Elements Need Assessment

Client History (Ed/Emp/Crim Hist)

Test Scores

YES Master Goal

Action Links

Links

- View/Edit Participant
- Dismiss Participants
- Record TouchPoints
- View Participant TouchPoints

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From the **Action Links** menu in the Participant Dashboard, select **Dismiss Participants**.

ETO™ software **EmployIndy**
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EmployIndy: Youth Employment Services

New Quick Search To Do List My Favorites My Dashboard Reporting Dashboard

Enter Search Term(s) within Participant in Youth Employment Services Search

Dismiss Participants from Youth Employment Services

Search for Participants in EmployIndy by last name and/or first name, Social Security Number, case number, or family name. To see **all Participants** leave the boxes empty.
1. Enter search criteria. 2. Select participant(s) to dismiss. 3. Enter dismissal information; if multiple participants are selected with different dates, finish on the following page.

* Program End Date:

Dismissal Reason:

Enter the **Program End Date** and select the appropriate **Dismissal Reason**. Note: Program End Dates are required to dismiss a client, but Dismissal Reasons are not.

To Re-Enroll a Client

ETO™ software **EmployIndy**
GRAND HARRISON COUNTY'S WORKFORCE

EmployIndy: Youth Employment Services

Welcome Stephanie Fritz | Help | Log Off

New Quick Search To Do List My Favorites My Dashboard Reporting Dashboard

Enter Search Term(s) within Participant in Youth Employment Services Search

YES Staff Dashboard Message

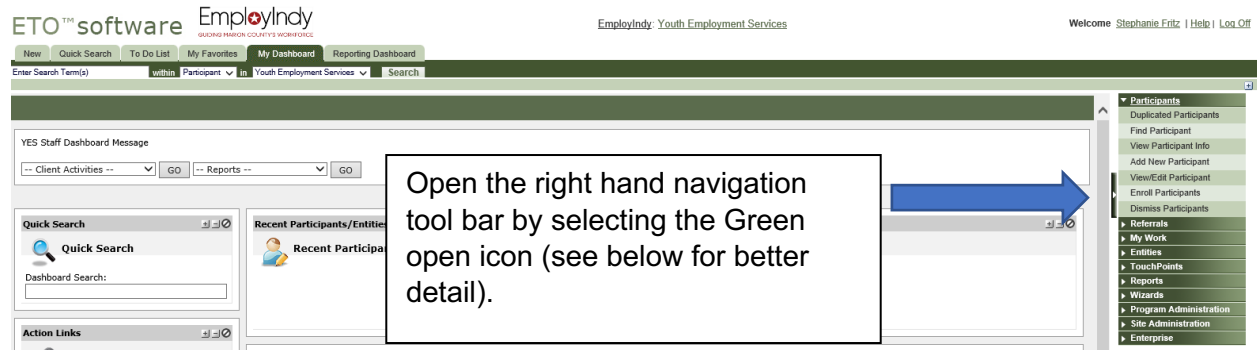
-- Client Activities -- GO -- Reports -- GO

Quick Search Quick Search Dashboard Search:

Action Links

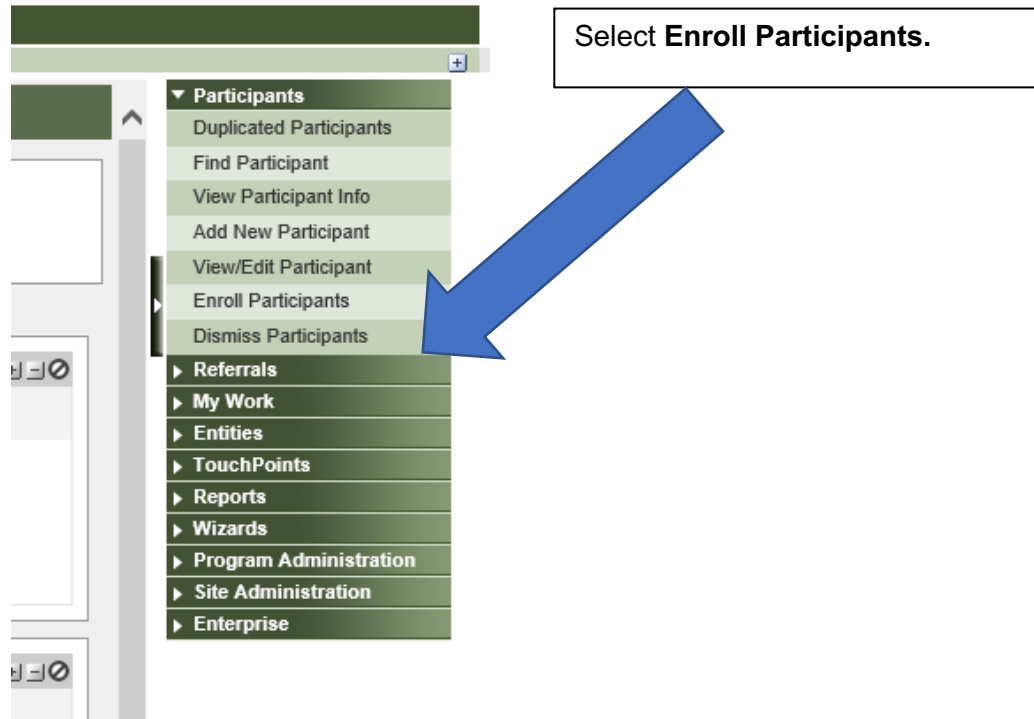
Recent Participants/Entities Recent Participa

Open the right hand navigation tool bar by selecting the Green open icon (see below for better detail).



Welcome [Stephanie Fritz](#) | [Help](#) | [Log Off](#)

Select **Enroll Participants**.



- ▼ Participants
 - Duplicated Participants
 - Find Participant
 - View Participant Info
 - Add New Participant
 - View/Edit Participant
 - Enroll Participants
 - Dismiss Participants
- ▶ Referrals
- ▶ My Work
- ▶ Entities
- ▶ TouchPoints
- ▶ Reports
- ▶ Wizards
- ▶ Program Administration
- ▶ Site Administration
- ▶ Enterprise

Enroll Participants into Youth Employment Services

Search for Participants in EmployIndy by last name and/or first name, Social Security Number, case number, or family name. To see **all Participants** leave the boxes empty.
1. Enter search criteria. 2. Select participant(s) to enroll. 3. Enter enrollment information; if multiple participants are selected with different dates, finish on the following page.

Last Name:
First Name:
or
SSN:
or
Case Number:
or
Family Name:

Search for your client by **Last Name, First Name, Case Number, or SSN**. Check the box next to the name of the client you would like to re-enroll.

Below are all Participants who are not currently enrolled in **Youth Employment Services** with last name like 'test'.

<input type="checkbox"/>	Participant	Age	Case Number	DOB	SSN
<input type="checkbox"/>	Ima Test	37	270697	10/06/1981	XXX-XX-6789



Below are all Participants who are not currently enrolled in **Youth Employment Services** with last name like 'test'.

<input checked="" type="checkbox"/>	Participant	Age	Case Number	DOB	SSN
<input checked="" type="checkbox"/>	Ima Test	37	270697	10/06/1981	XXX-XX-6789

* Program Start Date:

Once the checkbox is selected, enter the new **Program Start Date**. Note: This program start date does not replace any prior program start dates.

Edit Participant



Status: **Currently Enrolled**

YES Pre-Application Required Demographics

First Name *
Middle Name
Last Name *
Suffix

You can see a clients program history by selecting the **Program History** button on a client's View/Edit Participant screen.

Program History for Ima Test

Program							
Youth Employment Services							
Enrollment	Program Start Date	Program End Date	Projected End Date	Days in Program	Reason for Dismissal	Staff	
Currently Enrolled	12/17/2018			1		Stephanie Fritz	
Past Enrollment	10/5/2018	12/15/2018		72		Stephanie Fritz	