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

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

There are no recent TouchPoints for this participant.
To Re-Enroll a Client

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.
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.

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

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