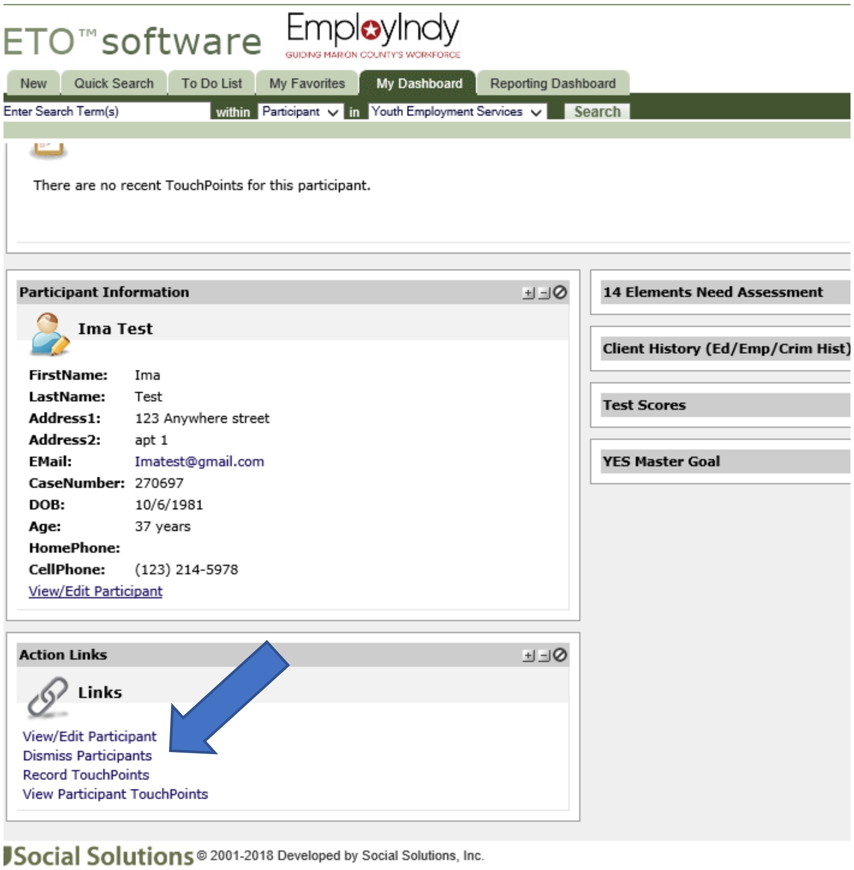
DISMISSING
& RE-ENROLLING
CLIENTS

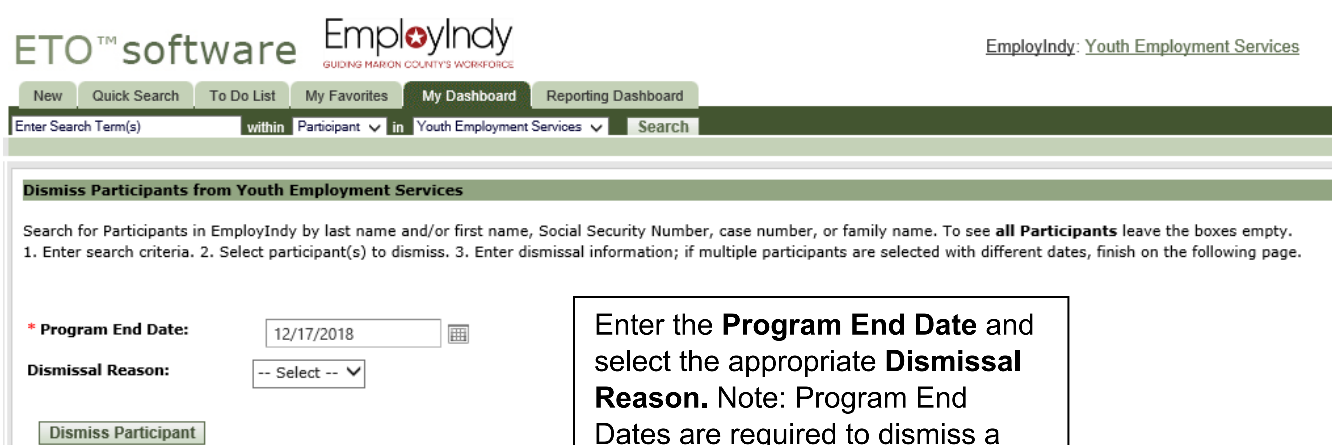
A FEW NOTES BEFORE YOU GET STARTED:

- 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 spefic 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

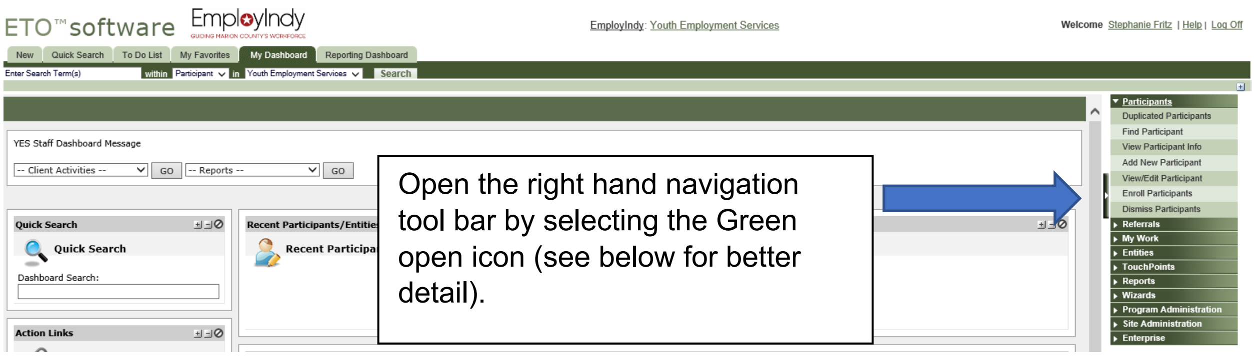


From the **Action Links** menu in the Participant Dashboard, select **Dismiss Participants.**

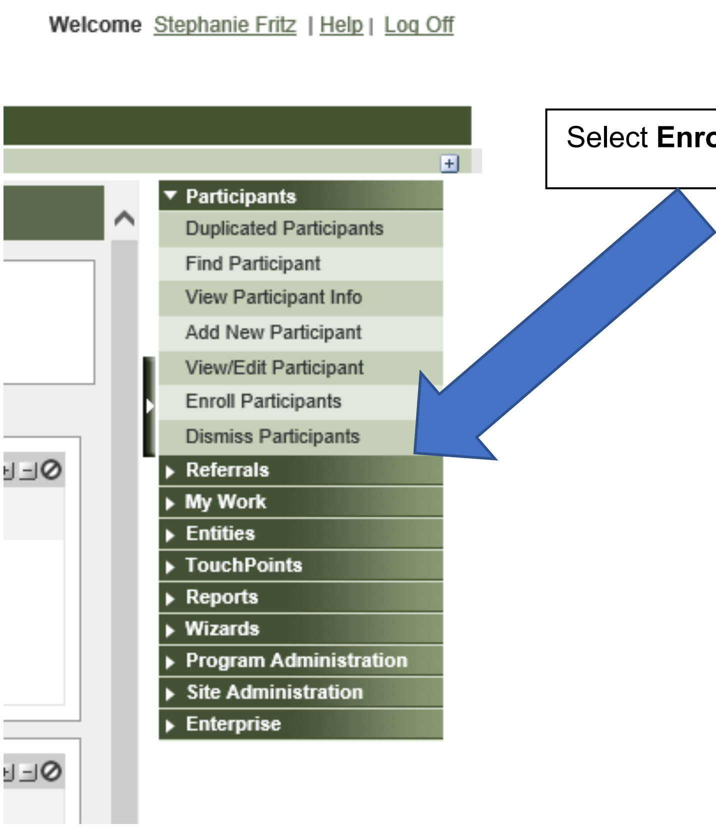


Enter the **Program End Date** and select the appropriate **Dismissal Reason.** Note: Program End Dates are required to dismiss a client, but Dismissal Reasons are not.

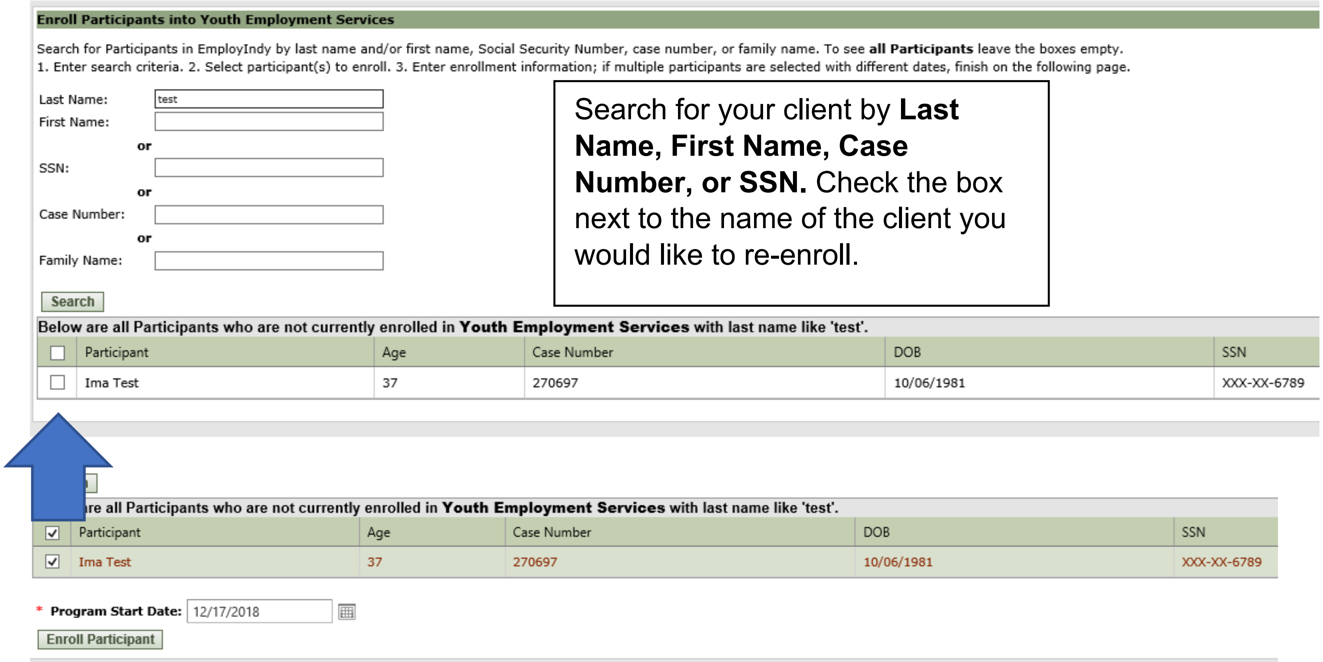
To Re-Enroll a Client



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

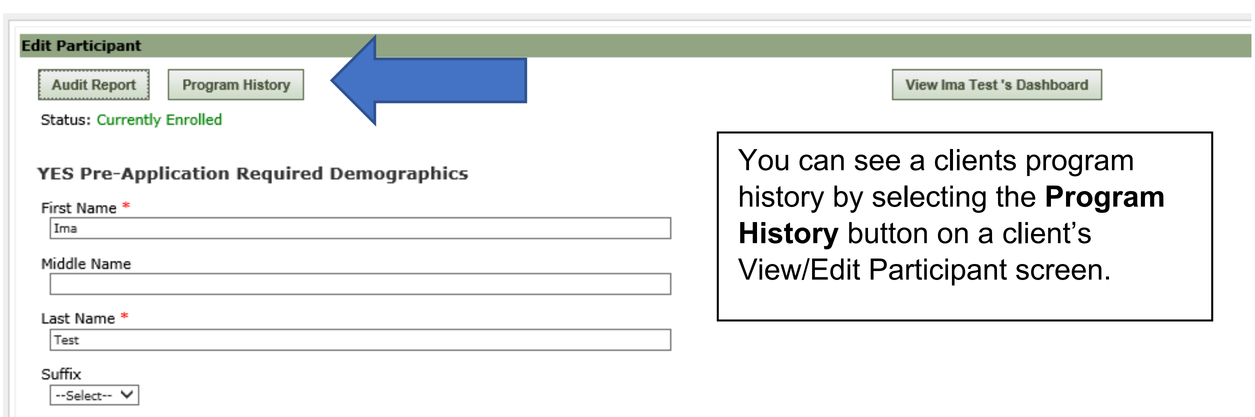


Select **Enroll Participants.**



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.