

TUTORIAL - ENROLLMENT INFO

NEW GUARDIANS

When entering a new family, you'll assign the primary guardian a Current Status.

- Status options show here. (See Status Relationships at the end for further details)

The screenshot shows the 'Enrollment Info' form. The 'Current Status' dropdown menu is open, displaying the following options: 'Select Status', 'Active', 'Recruit', 'Mailing Only', and 'Waiting List'. The 'Create' and 'Cancel' buttons are visible at the bottom of the form.

Depending on the Status chosen, you'll be given the choice of an **Enroll Date** (Active status) or **Start Date** (all other statuses)

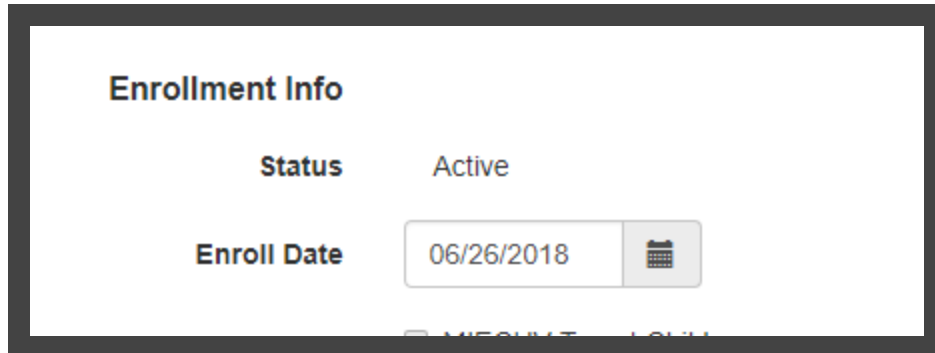
The screenshot shows the 'Enrollment Info' form with 'Active' selected in the 'Current Status' dropdown. The 'Enroll Date' field is populated with '06/26/2018'. The 'Participation' field is empty.

The screenshot shows the 'Enrollment Info' form with 'Recruit' selected in the 'Current Status' dropdown. The 'Start Date' field is populated with '06/26/2018'. The 'Participation' field is empty.

NEW CHILDREN


When entering a new child, the child will be assigned the same status as the guardian.

- In this example, the guardian's current status is Active. Therefore the child is assigned an Active status.



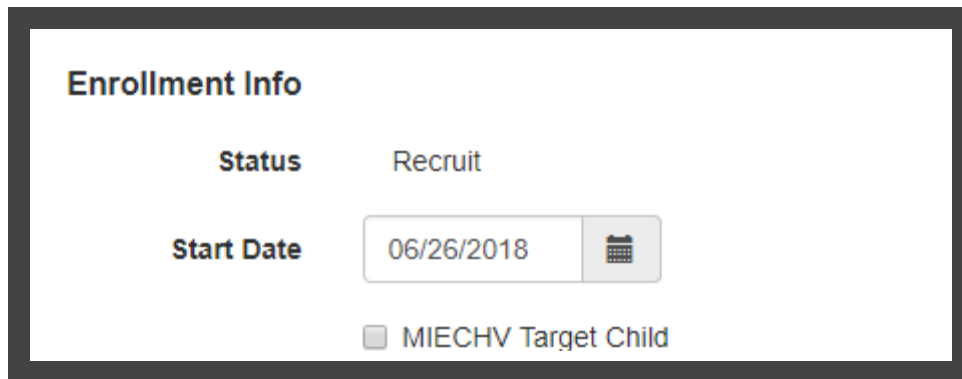
Enrollment Info

Status Active

Enroll Date 06/26/2018 


MIECHV Target Child

- In this example, the guardian's current status is Recruit. Therefore the child is assigned Recruit status.



Enrollment Info

Status Recruit

Start Date 06/26/2018 

MIECHV Target Child

UPDATING AND EDITING CURRENT STATUS

From the “Enrollment Info” section, there are 2 options “Edit Current Status” or “Create New Status”

Create New Status

The screenshot shows the 'Enrollment - Change Status' dialog box. The 'Create New Status' button is circled in red. The dialog box contains the following fields:

- Select New Status:** Inactive / On Hold (selected)
- Hold Start Date:** Exited
- Hold Reason:** Select Hold Reason
- Change Child Status

Buttons: Save, Cancel

The second dialog box shows the 'Enrollment - Change Status' dialog box with the following fields:

- Select New Status:** Exited
- Exit Date:** 06/26/2018
- Exit Status:** Completed Program
- Exit Reason:** Completed services required by model
- Change Child Status

Buttons: Save, Cancel

Edit Current Status

The image illustrates the process of editing the current status of an enrollment record through a web application interface.

Enrollment Info

Edit Current Status **Create New Status**

Current status: Active **Enroll Date:** 03/03/2017

Enrollment - Edit Current Status

Current Status: Active

Start Date: 06/11/2018

Save **Cancel**

Enrollment - Edit Current Status

Current Status: Active

Start Date: 06/11/2018

Active

Exited

Save **Cancel**

Enrollment - Edit Current Status

Current Status: Exited

Exit Date:

Exit Status: Select Exit Status

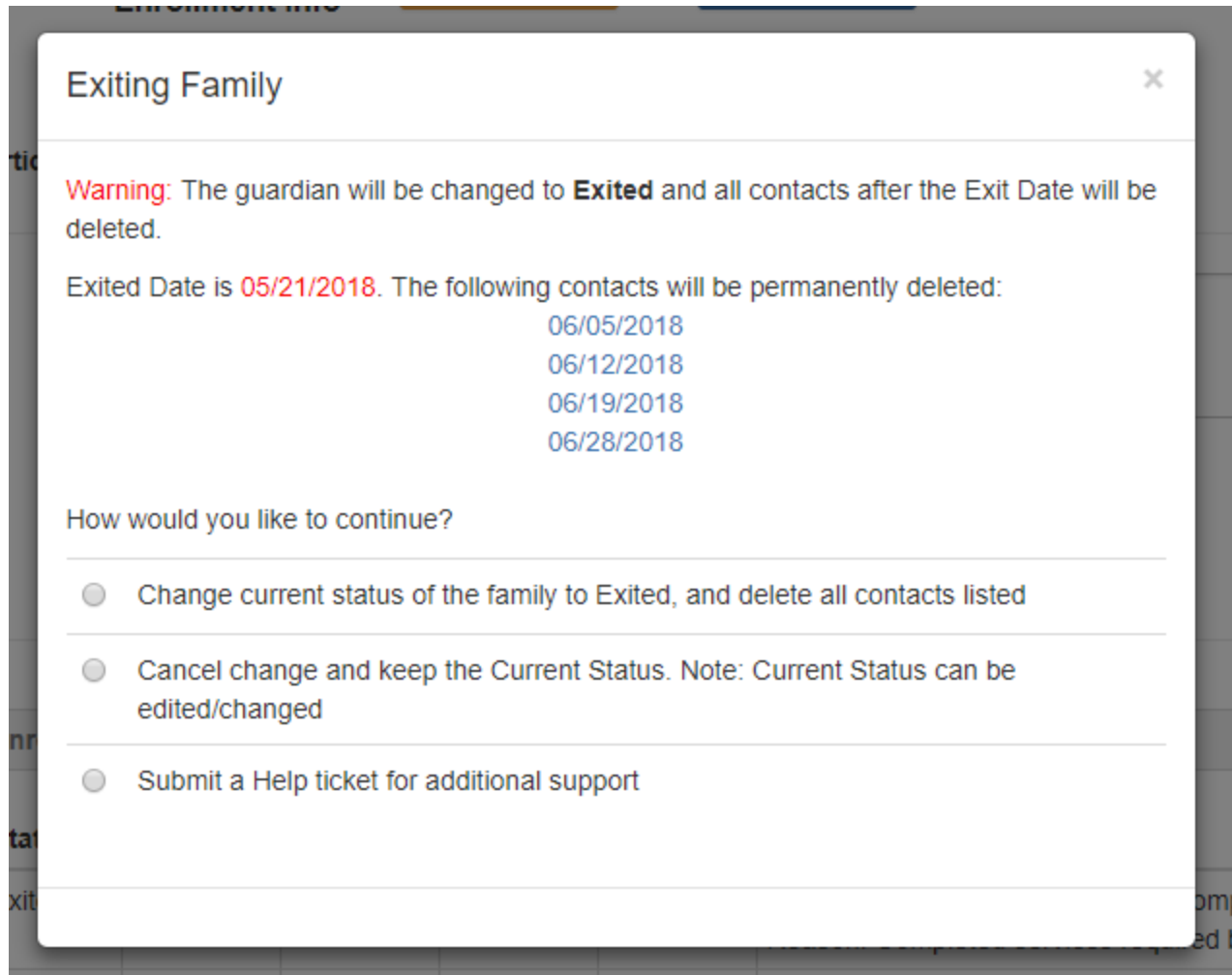
Exit Reason: Select Exit Reason

Save **Cancel**

SPECIFIC SCENARIOS

Any time you are editing and deleting resulting in an Exited status with an Exit Date that is before a private contact, this warning will appear.

This warning message explains what will happen and what options you have. If in doubt, choose 'Submit a Help ticket for additional support'.



When editing an entry, the Start Date will be limited by the Start Date of the status prior to it.

In this example, there is another status that starts on April 13, 2018.

The screenshot shows a dialog box titled "Enrollment - Edit Current Status". It contains the following fields:

- Current Status:** Inactive / On Hold
- Select Status:** Active (dropdown menu)
- Hold Start Date:** 04/13/2018 (calendar icon)
- Hold Reason:** (dropdown menu)

A calendar for April 2018 is displayed, showing dates from 1 to 30. The date 13 is highlighted in blue. A red box highlights the error message "Can't select dates before 4/13/18." with an arrow pointing to the date 13 on the calendar. The "Save" and "Cancel" buttons are visible at the bottom right of the dialog.

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5
6	7	8	9	10	11	12

STATUS RELATIONSHIPS

Here are a few things that limit which statuses can be selected

- Status to status relationship
- Guardian and child statuses - Child statuses limited by the guardian statuses
- New guardian / new child

Status - these rules apply to the current status and when editing a status in the history table

- **Active** - only **Inactive / On Hold** or **Exited** can be selected
- **Inactive / On Hold** - only **Active** or **Exited** can be selected
- **Exited** can only be selected if current status is **Active** or **Inactive / On Hold**

Guardian and child statuses

- Guardian current status is **Exited** - all children must also be Exited
- Guardian current status is **Recruit, Wait list** or **Mailing Only** - all children not already Exited must also be **Recruit, Wait list** or **Mailing Only**
- Guardian current status is **Active** - child can be **Active** or **Waiting List**

New guardian

- Status selections are **Active, Recruit, Mailing only,** and **Wait list**

New children

- Current status of the guardian is automatically assigned to the child