

Background

There are times when a youth member or adult volunteer will decide during an enrollment year to drop out. Sometimes they will have an incomplete or pending enrollment and never complete the steps necessary to be fully approved. This tip sheet explains how to clean up these members so that they will not appear on your Awaiting Review list, broadcast emails, or project/club rosters while still allowing the family to enroll again in the future.

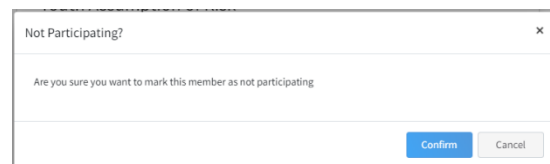
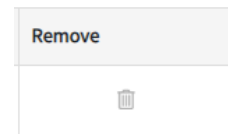
Archiving prevents the family from enrolling the member in the future, prevents the preservation and counting of the enrollment data for this year, does not remove the member from club rosters, and should not be used.

Steps to take differ depending on the member's role (youth/adult) and current status.

Approved Youth and Adults

These are the easiest to manage. Since they were approved and active at some point in the year, we want to maintain the record of their involvement during the year.

1. Go to Enrollments -> Approved and click on the member's name.
2. In the Clubs section, click on the Edit button.
3. Click on the trash can icon for each club and then click the Save button when done.
4. In the Projects section, click on the Edit button.
5. Click on the trash can icon for each project and then click on the Save button when done.
6. Scroll all the way to the bottom of the screen and click on the Not Participating button.
7. You will get a message box asking if you are sure, click the Confirm button.



At this point the member's status will be "Not Participating" and they will not be listed with any clubs or projects. They will be able to log in and click on Enroll Now in the future if they wish to re-enroll.

You can re-instate the member by clicking on the member in the Members search screen and clicking the "Mark As Participating" button. They will be Approved again, but if you deleted the club and projects, these would need to be re-added.

Cleo Cat #198779

Enrollment Status: Not Participating Mark As Participating

Awaiting Review Youth

If you have a youth that decides to withdraw after submitting and enrollment, but before you approve the enrollment, do one of the steps below:

- Send Back the enrollment and then follow the Resubmit Youth instructions below.
- Approve the enrollment and then follow the Approved Youth and Adults instructions above.

Awaiting Review Adults

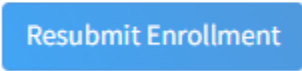
Adults who are awaiting review but cannot be approved due to missing trainings or background checks can be Sent Back to remove them from the county's Awaiting Review list. This gives the volunteer a chance to re-submit the enrollment in the future if they decide to complete the missing enrollment pieces later in the year. They also can enroll in a future year if they choose.

The volunteer will still appear on club and project rosters. *Note: You might want to keep them on the Club roster so that the club leader(s) can help to encourage them to complete the missing enrollment pieces.*

To remove them from the club/project rosters:

1. Click on the member in the Participation search screen.
2. Click on the Resubmit Enrollment button.
 - a. *Note: There is a delete button on this screen, but please do not click on this if there are any completed trainings or pending or completed background checks for this year. Trainings and background checks are tied to enrollment years and deleting the enrollment will "orphan" the training and/or background check.*
3. Click on the Next button to advance to the Clubs section.
4. Click on the Trashcan icon to delete each club listed.
5. Click on the Next button to advance to the Projects section.
6. Click on the Trash can icon to delete each project listed.
7. Click on the Next button to advance to the Questions section.

Enrollment Status: Resubmit

A blue rectangular button with the text "Resubmit Enrollment" in white.

Resubmit Adults

DO NOT DELETE THESE ENROLLMENTS. Trainings and background checks are tied to enrollment years. Deleting the year will orphan any trainings and/or background checks associated with the year.

There is no need to do anything with these other than possibly remove the club and projects. *Note: You might want to keep them on the Club roster so that the club leader(s) can help to encourage them to complete the missing enrollment pieces.*

To remove them from the club/project rosters:

1. Click on the member in the Participation search screen.

2. Click on the Resubmit Enrollment button.
 - a. *Note: There is a delete button on this screen, but please do not click on this if there are any completed trainings or pending or completed background checks for this year. Trainings and background checks are tied to enrollment years and deleting the enrollment will “orphan” the training and/or background check.*
3. Click on the Next button to advance to the Clubs section.
4. Click on the Trashcan icon to delete each club listed.
5. Click on the Next button to advance to the Projects section.
6. Click on the Trash can icon to delete each project listed.
7. Click on the Next button to advance to the Questions section.

Enrollment Status: Resubmit

Resubmit Enrollment

Resubmit Youth

A youth in this status has not been approved yet and there is nothing tied to the enrollment year, so the enrollment can be deleted.

1. Click on the member from the Member or Participant search screen.
2. You will be on the member’s Enrollment information screen. Click on the Resubmit Enrollment button.
3. You will be on the first screen of the enrollment process and there will be a Red Delete in the lower right corner.
4. Click on the Delete.
5. A box will appear asking if you are sure. Click on the Confirm button.

Enrollment Status: Resubmit

Resubmit Enrollment

 Delete

Delete enrollment? x

Are you sure you want to delete this enrollment?

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