**QRG – Add Case Notes to An Exited Enrollment**

**WHO IS THIS GUIDE FOR** - If you have a client who has already been exited from an enrollment, but you want to add Case Notes.

**OVERVIEW** – You will temporarily be re-opening the enrollment, adding the Case Notes and then re-exiting the enrollment.

**STEP 1** – Go to the Enrollment Member Summary and **make note of the original Exit Date**

**STEP 2** – Click on the *Status* for the exited program you need to re-open, Select [Re-open enrollment]

**STEP 3** – Go to the Case Notes for the client and click [Add New] and add the case note as usual.
Step 4 – Go to the Enrollment Member Summary again and click on **Exit Enrollment w/ Reservation**.

![Image of the Enrollment Member Summary page](image)

Step 5 – Complete the Exit Assessments and enrollment as usual; with 2 cautions.

**First:** After selecting Yes to copying Assessments, you should choose the original Exit Assessment available to select. (the date should match from what you noted from Step 1)

![Image of Assessments](image)

**Second:** Be sure to use the original Exit date for End Date (by default it shows current date)

![Image of End Date](image)