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4.2.5 Member Enrollment
WBRS On Line Help

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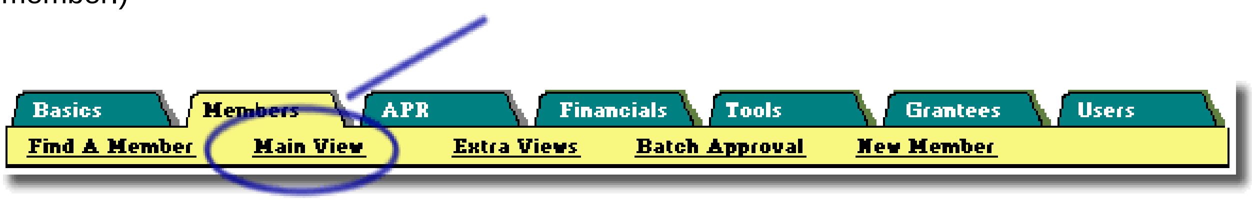
To enroll a new member with the Trust, you must fill out a Member Enrollment Form. When completed, a member's enrollment form and all their other forms and worksheets will be listed with their MIP. There isn't much information you need to type into the enrollment—most of it is inherited from the MIP. Note that if you make changes to the MIP after you've created the enrollment, those changes usually won't show on the enrollment (a few types of changes do). The reason is that the information showing on the enrollment is pulled in (**inherited**) from the MIP at the time the enrollment is created, and won't be updated if you modify the MIP.

Enrolling a Member

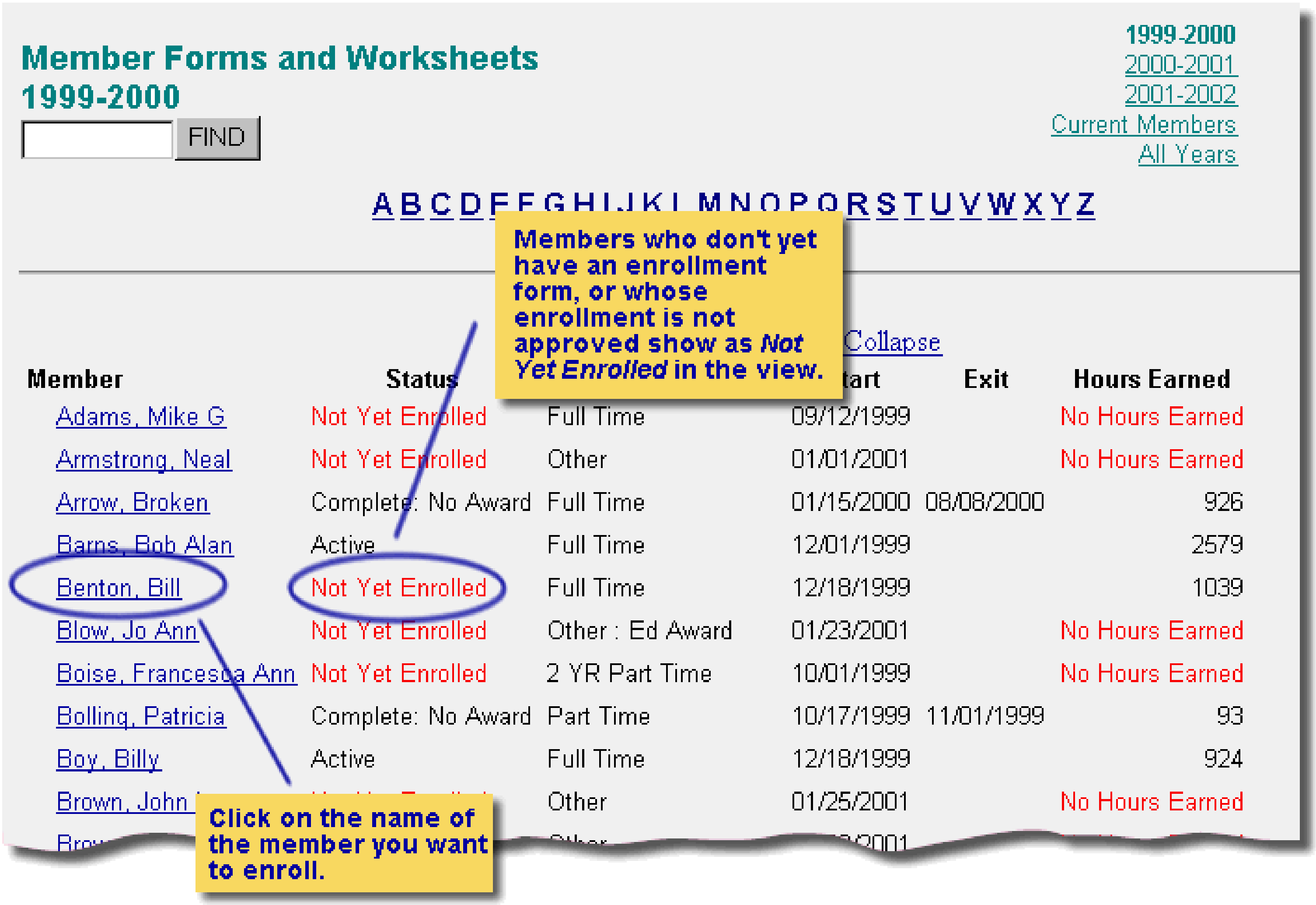
There are several places from which you can create an enrollment for a member. **Remember an MIP must be created and approved for the member before you can enroll them.**

- **From the Thank You screen:** When you save an MIP as approved for a member, you can create an enrollment for the member right away by clicking the *Create Enrollment Form* link. Skip to step 4 below.
- **From the main menu:** If you've approved a member's MIP previously, you can create an enrollment by finding the member and clicking the *Enrollment* link at the top of the member's page.

1. From the *Members* tab, click on *Main View.* (You can also use the *Find a Member* function to locate the member.)

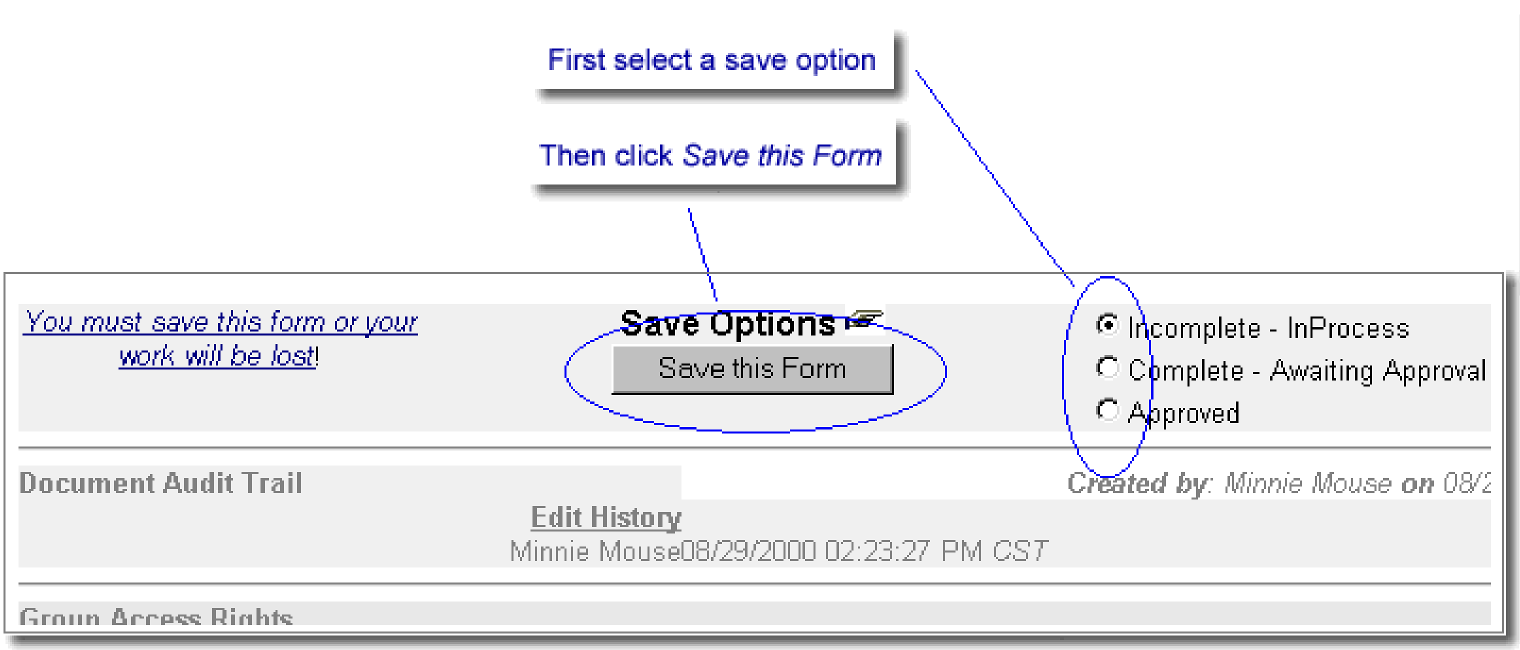


2. Click on the name of the member for whom you want to complete an enrollment form. Members who don't yet have an enrollment form, or whose enrollment is not approved show as *Not Yet Enrolled* in the view.



3. Click on the *Enrollment* link, which appears at the top left of the page.

4. Fill out the form, select a save option and click *Save this Form.* For more on saving see (what else) **saving**.



A *Thank You* screen will appear when you've saved the Enrollment Form. From the *Thank You* screen, there are several options to create other member documents. You can use these links, or navigate elsewhere using the **main menu**. **Please note that the enrollment will not be downloaded to the trust until after it is approved.** Once approved, enrollments are usually downloaded within a week.

Updating a Member's Enrollment

In most cases you won't need to update a member's enrollment, even if you modify the MIP. There is one case in which you'll need to work with the enrollment form if you update the MIP: if the enrollment form has been **created but not downloaded to the Trust:** If changes are made to the member's MIP **after** their enrollment has been created but **before** it is downloaded, you should delete the enrollment and then create a new one.

If you need to make changes to a member's MIP (start date correction, e.g.) after the enrollment has been downloaded, you don't need to have the enrollment re-opened and changed, **even though the enrollment shows incorrect information**. This is because when you make changes to an MIP **after** the enrollment has been downloaded, the Trust will receive notification of the change. They will then update the member's information in their database, so it will be current. When you create the member's exit, it will **inherit** the corrected information from the MIP, **even if the enrollment form data is incorrect.**

Just about the only time you need to have a member's enrollment re-opened is when you intend to delete the member. For instructions on how to have downloaded forms re-opened, please see **Re-opening Downloaded Documents: Exits & Enrollments**.