



Operations Manual

Governed By: Operations	Effective Date: 6/13/2014
Procedure: #9 CAP 60 Roll-Over	Updated Last: July 2015
Purpose: To provide instruction for required roll-over at the conclusion of each program operating year for the Administrative team.	

Summary:

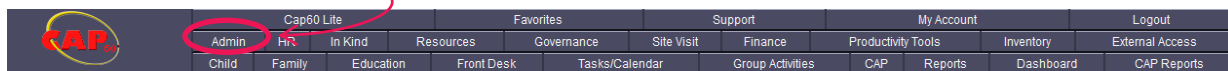
Each Program at CEO will need to complete the roll-over process in the CAP60 database to enroll current, continued customers in the new program year for services.

The following steps should be completed in preparation of roll-over:

- Prior to the end of the current program year the program must outline which customers in the database will continue to be enrolled in the program in the upcoming program year, and which customers will not be re-enrolled unless re-engaged with the program in the future. If a customer is not chosen to roll-over when the roll-over is completed, a program can still re-enroll on an individual basis throughout the new program year.
- Program Manager should work submit a comprehensive case list to the Program Operations Program Specialist 1 week prior to roll-over. This report will clearly outline all customer and all customers who will *not* be roll-over.

To Complete Roll-Over:

- Log-in
- Choose "Admin" tab



- Select "Roll-Over"



- Choose Current Year, Program, Status "All", County "All", Center "All" and Caseworker "All".



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Admin | HR | In Kind | Resources | Governance | Site Visit | Finance | Productivity Tool

Child | Family | Education | Front Desk | Tasks/Calendar | Group Activities | CAP | Re

RollOver

Save Add Contacts

Agency	Commission on Economic Opportunity
Center Name	All
Caseworker	All
Year	Select One
Program	Select One
Status	All
County	All

RollOver TO:
Year Select One

[NOTE: If you would like to do any additional roll overs, please click here to bring the Save button back.](#)

RollOver << < 1 of 1 > >> Export To Select One Total = 0

- Under “RollOver TO: select the upcoming program year.
- Use report submitted by each Program Manager to “unselect” any customers that have been identified as not rolling over at this time.