

## EPIC CBO TA Webinar 1/18/2017

- **Dashboard – Enrolled**
  - Covers the following areas in the dashboard. If you have customers in this section, work to move them out into either a red or green section.
    - Referral Pending – Need 2151
    - Referral Pending – 2151 Past Due
    - Referral Accepted & Enrollment Started – Enrollment Required
    - CBO Needs to Upload – Past Due or No Progress
    - Exited Status – Completion Documentation Needs Uploaded
- **Dashboard – ISTEP**
  - If customers do not need steps in the **Personal Development Section**, mark them as **Completed**.
  - Customers who are in the following areas need to be addressed by completing that section
    - **Career Planning**
      - Target Occupation Not Selected
      - Target Occupation Selected
      - No Steps Identified
    - **Academic/Technical Training**
      - No Steps Identified
- **Update CBO Contacts**
  - If you have any changes to your EPIC staff, please email [epic@illinoisworknet.com](mailto:epic@illinoisworknet.com) with the new staff members contact info.
- **Filling out the 2151 and 2151A**
  - The 2151 **must** be uploaded within 48 hours of the customer's appointment time.  
[https://www.illinoisworknet.com/partners/EPIC/Documents/EPIC%20CBO-DHS%20intake%20process\\_Final.pdf](https://www.illinoisworknet.com/partners/EPIC/Documents/EPIC%20CBO-DHS%20intake%20process_Final.pdf)
  - The first 2151A should outline the plan of the customer within the first 48 hours of the customer's appointment time.
  - The customer will need a 2151A filled out every month to reflect the previous months engagement.
  - If the customer needs to be recommended for conciliation or sanction you will also use the 2151A
  - Filling out the 2151A  
[https://www.illinoisworknet.com/partners/EPIC/Documents/Completing%20a%202151A\\_Final.pdf](https://www.illinoisworknet.com/partners/EPIC/Documents/Completing%20a%202151A_Final.pdf)
  - Conciliation  
<https://www.illinoisworknet.com/partners/EPIC/EPICRestrictedDocuments/Conciliation%20instructions.pdf>
- **New Updates Now Available**
  - New Filter options available on the customer search.
  - The ISTEP now opens after a customer has been enrolled by the CBO on the progress page.

- You can now click on the customer's employer information that was input to the EPIC system upon the customer exiting EPIC after being hired by employer.
- CBOs can now update the customer's contact info on the customer's profile page.
- **Upcoming updates**
  - We will be removing **Withdraw from Study** as one of the unsuccessful completion options.
    - We will be pulling this information in from EPIS, instead of having the CBO's try to figure out if the customer called the EPIS number to withdraw.
  - We will be removing the **Completed EPIC Training** step in ISTEP in the Academic/Technical Skills section. **If you have this step selected for any of your customers please update it to one of the following:**
    - Completed EPIC Training Program (CTE/College Credit)
    - Completed EPIC Training Program (Industry Recognized Certificate Only)
    - Completed EPIC Training Program (Work Experience)
  - This step was added at the beginning of the program and we now have more specific steps to help track customers.
- **Fiscal –**
  - The DGR Reports, Trail Balances, & Performance Evaluations are due to Tammy by January 30<sup>th</sup>.
  - Tammy will be sending out an email reminder with the report and instructions on filling it out.
  - For the DGR report you only have to fill out the agency section and have it signed by an approved staff member. Check out this archived webinar (about 30 minutes in) that discussed the DGR for more info on filling out DGR reports.
    - <https://www.youtube.com/embed/kEzgjvix6Y>
- **Success Stories**
  - Please upload all of your EPIC success stories here: <http://www.illinoisworknet.com/WIOA/success/Pages/Success-Story-Guide.aspx>