

## EPIC CBO Weekly Webinar 11/2/16

- Performance Achievement and Expenditure Reconciliation Tool
  - Tammy Stone did an overview on how to fill out the document.
- Time Use Survey - Emily Snoek, Program Analyst, Mathematica Policy Research
  - Everyone should have received an email from Emily dealing with the Time Use Survey.
- Dashboard
  - Overview of the Eligibility Review and ISTEP Dashboards and the areas that have customers who need follow-up.
- Reports
  - New CBO Benchmark Report that shows the # of customers enrolled in training, in employment only, employed, and in retention only.
- Poll Question about Optimal Resume
  - Overview of Optimal Resume and the components available.
- Review Payroll and Worksite Placement
  - Overview of how to fill out and use Worksite Placement & Payroll.
- Template
  - Basic EPIC template available for use  
<https://www.illinoisworknet.com/partners/EPIC/Documents/EPIC%20Template.docx>
- CBO Intake options
  - Overview of the document  
<https://www.illinoisworknet.com/partners/EPIC/Documents/EPIC%20CBO%20intake%20process.pdf>
- Rejected Referral
  - Overview of the document  
<https://www.illinoisworknet.com/partners/EPIC/Documents/Rejected%20Referral.pdf>
- Completing 2151A
  - Overview of the document  
[https://www.illinoisworknet.com/partners/EPIC/Documents/Completing%20a%202151A Final.pdf](https://www.illinoisworknet.com/partners/EPIC/Documents/Completing%20a%202151A%20Final.pdf)
- Employed before CBO
  - Overview of the document  
<https://www.illinoisworknet.com/partners/EPIC/Documents/Employed%20before%20CBO%20Engagement.pdf>

- Answers to questions asked during webinar that required follow-up – we will demonstrate on the next webinar, if necessary.
  - If a customer is employment only, go to > customer ISTEP > academic/training section > open timeline & status section > mark section status as complete.
  - Community Service will be added to the Personal Development step and the Career Planning steps as an option. Should be available by close of business on 11-3-2016.
  - Update customer address and phone information in EPIC. We have put in a request to the programmer to allow the CBO the ability to make these changes in EPIC. We will keep you updated. In the interim, you can add a case note and send it as a message, and then email to the DHS primary contact so that the DHS file can be updated as well.