

Enrolled Dashboard

Make sure we are keeping an eye on the following areas, we need all the customers to display in the green.

- Referral Pending – Appointment has not been Scheduled
- Referral Pending – 2151 Past Due
- Referral Accepted & Enrollment Started – Enrollment Required
- CBO needs to upload – Past Due

ISTEP Dashboard

The ISTEP Plan needs to be utilized and filled out for each customers.

By next week make sure all of your customers have a Target Pathway and Target Occupation Selected. This can be updated in the Career Planning section of their Plan.

If a customer gets an unsuccessful completion on any of their steps include a case note stating the step and the reason the customer was unsuccessful.

Progress Page –Exit Information

When you exit a customer Red text will appear after you update it with the **Next Steps** required for that customer in order for them to be completely exited. The customer will not display as exited until the steps are complete. Make sure you are doing all of the next steps required.

2151 & 2151A Forms

When you upload the 2151 Form with **Client Services Indicated** you will also need to upload the 2151A with an outline of your plan for the customer. After that you will upload the 2151A between the 1-5 of the month with the previous months activates documented.

Reverse Referrals – Region 1

For Region 1 Only – Do not send Reverse Referral until after 9/5/2016, after that you will be sending the reverse referral customer to their local DHS offices. The Pod offices will not be accepting reverse referrals and are not always manned.

Decentralization

We are still providing training to the new locations. We are looking at having a CBO training on the 28th of September

We will be doing training for CBOs in the other Regions as well

Cost Data Studies

Reports need to be sent to Tammy

Outreach plan

We are going to start looking into efforts we can make to increase the referral process to get our numbers up.

Training Details Page

We are going to have the CBOs update their training program description to include when work experience begin. Example: A week after the customer finishes the training they are placed in work experience.