

EPIC CBO Webinar Notes 9-21-2016

New EPIC Updates

Reports for CBO – Training Program report and CBO Enrolled and Referred Report.

Progress Page – Exempt status and retention only services option have been included see updates page for more details. Intake Activates – You now have the ability to select morning and afternoon session when reinventing customers.

Payroll – Payroll tab has been updated and a Payroll Management tab has been included.

Learn more about the updates and find instruction guides and webinars that go into more detail on the updates page <https://www.illinoisworknet.com/partners/EPIC/Pages/Updates.aspx>.

Enrolled Dashboard

Make sure to keep an eye on the following areas, we need all the customers to display in the green or red they should not be sitting in yellow areas for long periods of times.

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

Site visits have started and ISTEP is something that must be completed for all customer before the site visit. Customers should have steps in Career Planning and Academic/Technical Skills, they may also need personal development steps as well.

Target Pathway and Target Occupation needs completed for all customers.

Customer's initial 2151A with the plan outline should also be reflected in the ISTEP dashboard by adding the steps you would like for the customer to accomplish throughout their training.

Conciliation – Sanction

Customers who go through conciliation and either do not show up to their appointment or don't agree to the terms need to have their 2151A uploaded with **Non – Cooperation** and **Recommend Sanction** in order to move out of the conciliation section of the dashboard and into **DHS Review – Recommend for Sanction** section of the dashboard.

Scheduling Intake Appointments

All CBOs need to have intake appointments scheduled through the end of December.

Orientation Process Overview

Overview of the process the customers go through to get to the CBOs.

CBOs should update their training program information to include as much information about the training program as possible so the customer will have a good understanding of what they are getting into.

The training program description is very important, customers look at these when decided which programs they want to enroll in.

Include information such as, what are the outcomes of completing the program, what training components have to be completed, etc.

Upcoming CBO Webinars

Wednesday, September 28th the topic we will cover will be working with people with criminal records.