

Purpose:

To provide a tool case workers/career navigators can use to schedule the initial training provider appointment while the customer is in the office.

Highlights:

- Training providers have the opportunity to communicate available initial appointment times.
- Customer has the opportunity to select a day and time that can work with their schedule while they are with the DHS case worker.
- Calendar tool populates the schedule date, time, and location in the 2151 form. This provides the appointment in writing so the customer can be scheduled immediately rather than waiting 7-10 days.
- The customer and training provider primary contact receive an email notice with appointment information.

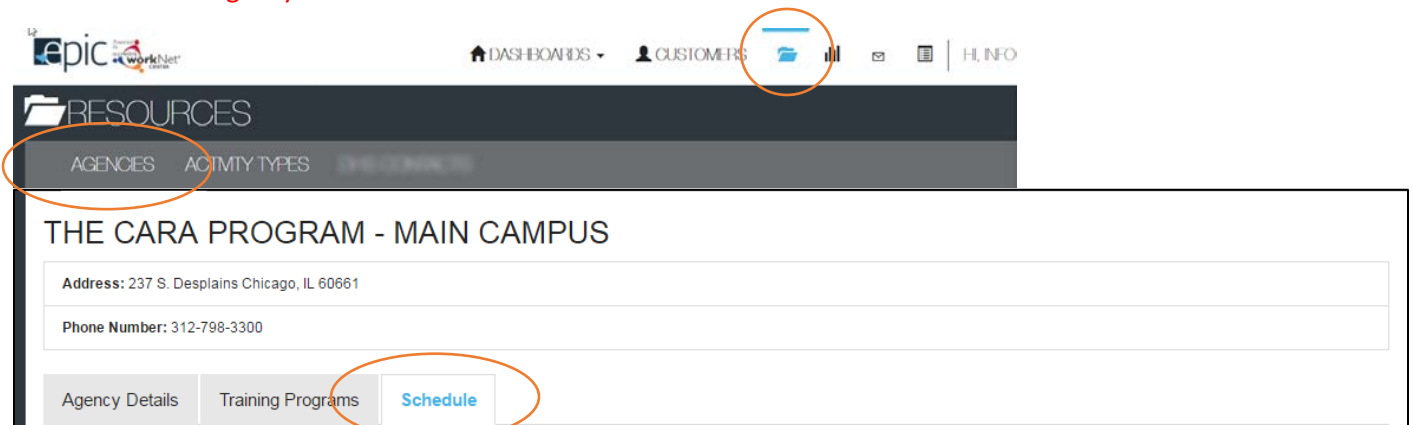
Who can use the calendar? Only DHS and CBO staff that have been given access to the EPIC program use the calendar for the initial provider appointment.

- **Statewide User Roles** - Statewide staff can access the calendars for all customer and training providers.
- **Career Planner/Case Worker Role** - Staff can access the calendars for all customer and training providers in their region/office who have submitted an EPIC application.
- **CBO Role** - Staff can view/edit the calendar for their agency.
- **Partner Roles** - Not applicable at this time. This tool can be reused in the future enhancements with employers/other partners for scheduling events or appointments (not related to the initial provider appointment).
- **Customers** - Not applicable at this time. This tool can be reused with future enhancements to sign up for employers/other partners' scheduled events or appointments (not related to the initial provider appointment).

CBO Training Providers Enter Appointment Openings

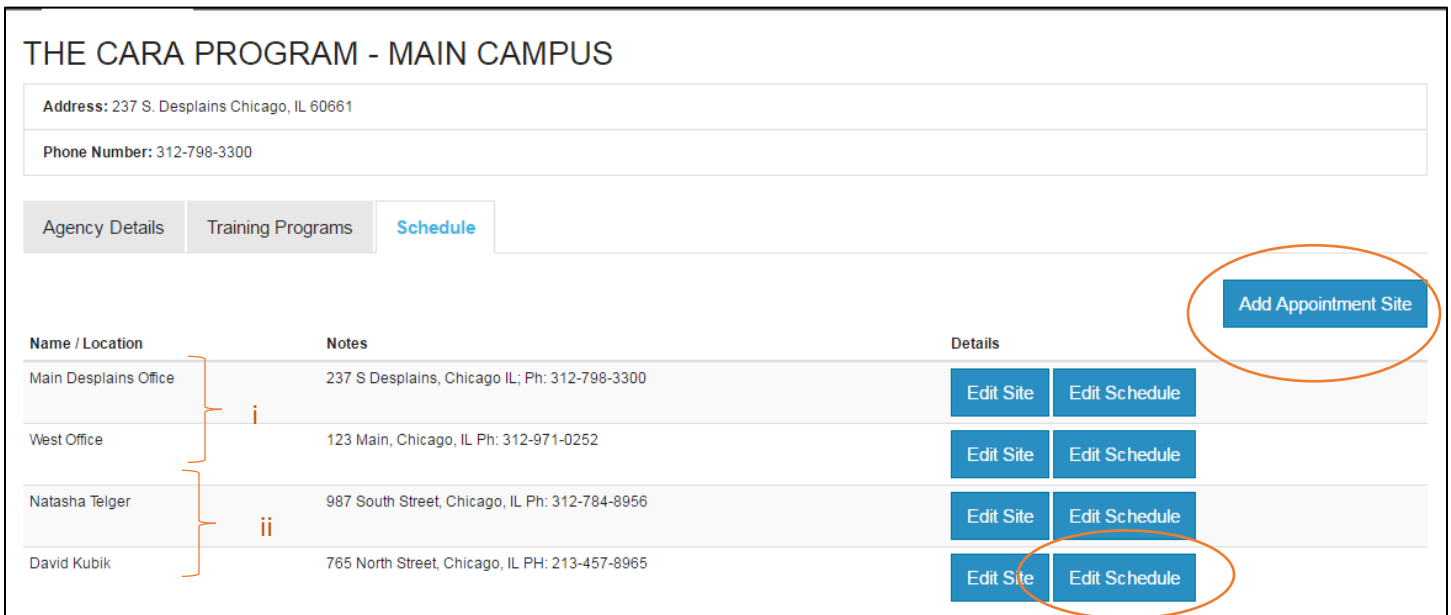
How do you access the calendar schedule tool?

1. Go to www.illinoisworknet.com and **log in** to your account.
2. Go to **My Dashboard** and select **Partner Tools**.
3. Select **EPIC Partner Tools**.
4. Select **Resources** and select **Agencies**.
5. Select the **agency name** and select **Schedule** tab.



6. Set/Edit Appointment Site

- a. Set appointment site. Each location can have one or multiple appointment sites. If there are multiple appointment sites, they can be set up by:
 - i. Location or
 - ii. Staff member
- b. Select **Add Appointment Site**
 - i. Enter the Name/Location
 - ii. Enter Description. Include address of the appointment and any other notes that would be helpful (parking instructions, etc.)



THE CARA PROGRAM - MAIN CAMPUS

Address: 237 S. Desplains Chicago, IL 60661
 Phone Number: 312-798-3300

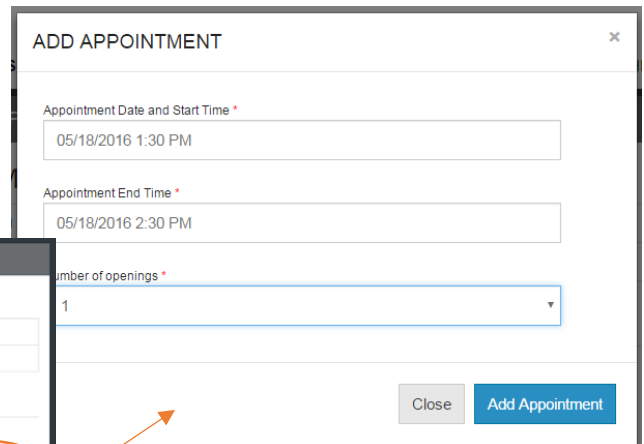
Agency Details | Training Programs | **Schedule**

Name / Location	Notes	Details
Main Desplains Office	i 237 S Desplains, Chicago IL; Ph: 312-798-3300	Edit Site Edit Schedule
West Office		Edit Site Edit Schedule
Natasha Telger	ii 987 South Street, Chicago, IL Ph: 312-784-8956	Edit Site Edit Schedule
David Kubik		Edit Site Edit Schedule

Add Appointment Site

7. Set Appointment Dates/Times

- a. Select **Edit Schedule**.
- b. Select **Add Appointment**.
- c. Enter **Start/End Date and Time**.
- d. Select the **number of people** that can sign up for that time slot and **Add Appointment**.



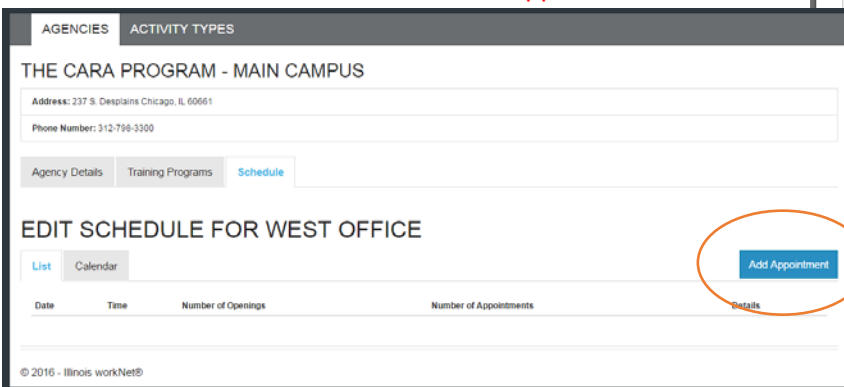
ADD APPOINTMENT

Appointment Date and Start Time *
 05/18/2016 1:30 PM

Appointment End Time *
 05/18/2016 2:30 PM

Number of openings *
 1

[Close](#) [Add Appointment](#)



EDIT SCHEDULE FOR WEST OFFICE

List | **Calendar**

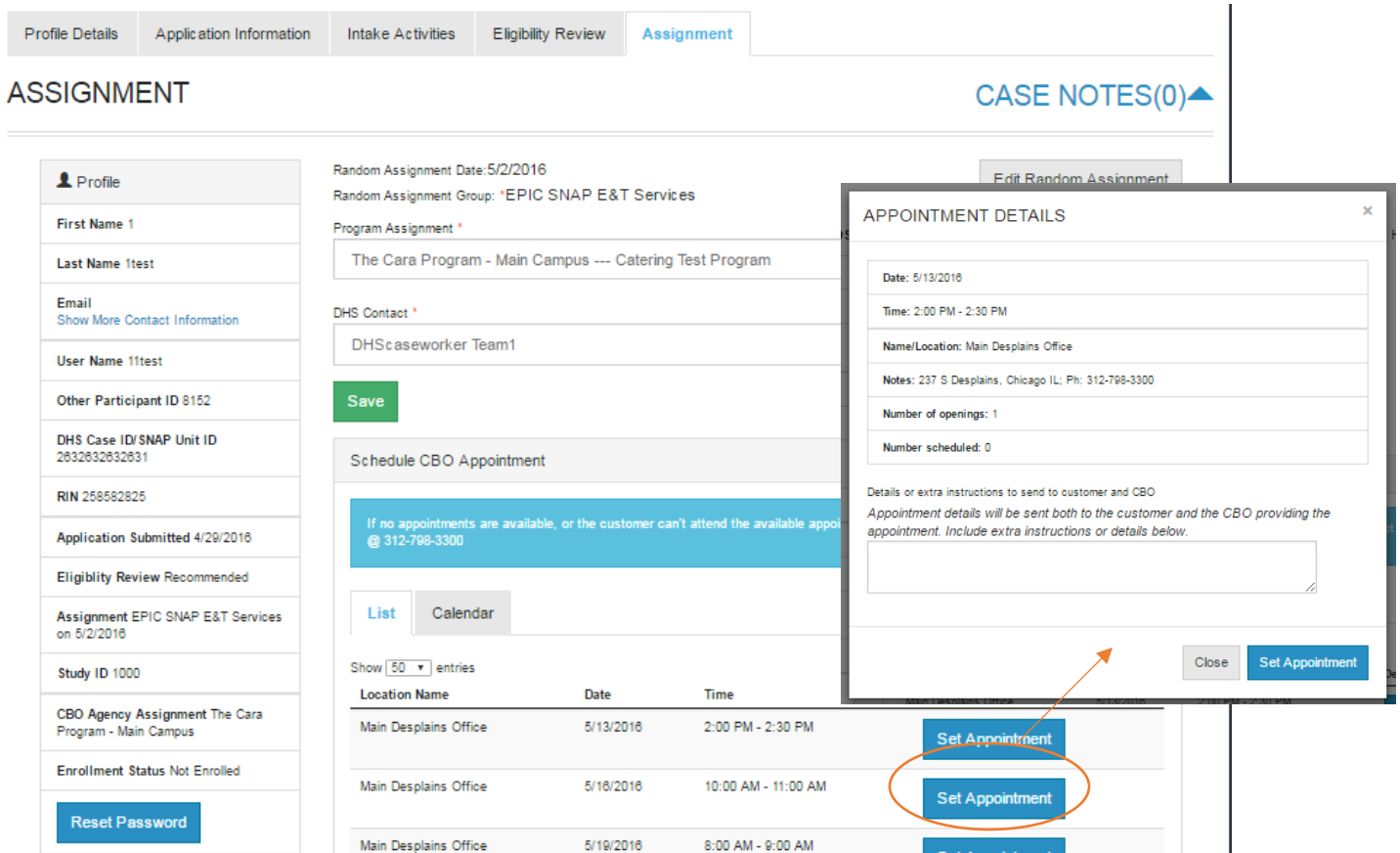
Date	Time	Number of Openings	Number of Appointments	Details
				Add Appointment

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Appointments slots are available in both a list view and calendar view.

DHS Staff Use the Schedule to Schedule Initial Training Provider Appointment

1. When DHS staff is assigning the customer to a training program, they select the program and the schedule appears on the page.
2. They work with the customer to identify a time slot that will work with their schedule and **Set Appointment**. They can enter additional notes when setting the appointment if needed.
3. Once the appointment is set an email/message is sent to the CBO staff and customer with the appointment details. A case note is also placed in the customer's case notes.



The screenshot shows the 'Assignment' tab in the EPIC system. On the left is a 'Profile' section with fields for First Name, Last Name, Email, User Name, Other Participant ID, DHS Case ID/SNAP Unit ID, RIN, Application Submitted, Eligibility Review, Assignment, Study ID, CBO Agency Assignment, and Enrollment Status. The main area shows assignment details: Random Assignment Date (5/2/2016), Random Assignment Group (EPIC SNAP E&T Services), Program Assignment (The Cara Program - Main Campus --- Catering Test Program), and DHS Contact (DHSscaseworker Team1). Below this is a 'Schedule CBO Appointment' section with a message: 'If no appointments are available, or the customer can't attend the available appointment @ 312-788-3300'. There are 'List' and 'Calendar' tabs, with 'Calendar' selected. A table shows appointments with columns for Location Name, Date, and Time. Three appointments are listed for 'Main Desplains Office' on 5/13/2016, 5/18/2016, and 5/19/2016. Each row has a 'Set Appointment' button. An 'APPOINTMENT DETAILS' modal is open, showing fields for Date (5/13/2016), Time (2:00 PM - 2:30 PM), Name/Location (Main Desplains Office), Notes (237 S Desplains, Chicago IL; Ph: 312-798-3300), Number of openings (1), and Number scheduled (0). There is a text area for 'Details or extra instructions to send to customer and CBO' and a 'Set Appointment' button at the bottom right of the modal. A red circle highlights the 'Set Appointment' button in the calendar, and an arrow points to the 'Set Appointment' button in the modal.

If staff need to change the appointment date they will remove the appointment and select a different appointment. Each of these actions (removing and setting an appointment) will generate an email message and case note.

If there are no appointments listed to select from, the agency phone number is listed for them to contact you to set up an appointment.

The appointment date and time will populate the 2151 form that can be downloaded from the **Assignment** tab and the **Progress Page**.

CBO – Update Appointment Date Using Progress Page

If a person does not show up for their appointment, you can reschedule their appointment on the Progress Page.

1. Remove the existing appointment date and set a new appointment date. Each of these actions will send an email and create a case note.
 - a. If you talk to the person, you can discuss available appointment times and select **Set Appointment**. Select an appointment date that is 7-10 days out. Although you are talking to the person, they must receive the appointment notice in writing. Otherwise DHS will not be able to start the reconciliation process (if needed).
 - b. If you are unable to reach the person, select an appointment time that is 10 days out.
2. **Download 2151** form and mail it to the customer. You do not need to send a copy to DHS. They have complete access to the customer’s information and case notes.

If you do not have any appointment times in the system, add them. Then go to the **Progress Page** and proceed with setting the appointment time.

Training Program Placement

Identify the training program assignment for this person. The actual start/completion dates and current status will be recorded in the customer's Individualized Services, Training, and Employment Plan (ISTEP).

CBO Enrollment Status *

Enrolled

Program Assignment *

Catering Test Program (Initial Assignment)

Update

NOTE: Once a person is enrolled in a program, you will not be able to update the initial appointment status.