Document EPIC Control Group Customer Progress

June 2018 v5

Contents

Purpose

To allow providers to enter data for EPIC control group customers into the EPIC tools to **report** completed services, accomplishments, and current status. EPIC control groups include customers who were identified as Traditional SNAP E&T customers and Community- Only Services customers when they went through initial EPIC random assignment. Only control group customers who have not withdrawn from the study are included in this tool.

How to Get Access to Control Group Tools

1. Providers must be identified by IDHS state staff. IDHS state staff will notify Illinois workNet of the partner site locations that should have access.
2. Providers must set their site up as a partner site and staff should create an Illinois workNet account.
3. Providers should send an email to info@illinoisworknet.com requesting access to the EPIC control group. Once the information is verified, Illinois workNet staff will grant access to the EPIC control group tools. Staff will receive a notice once they are granted access.

Who Enters/Maintains Data

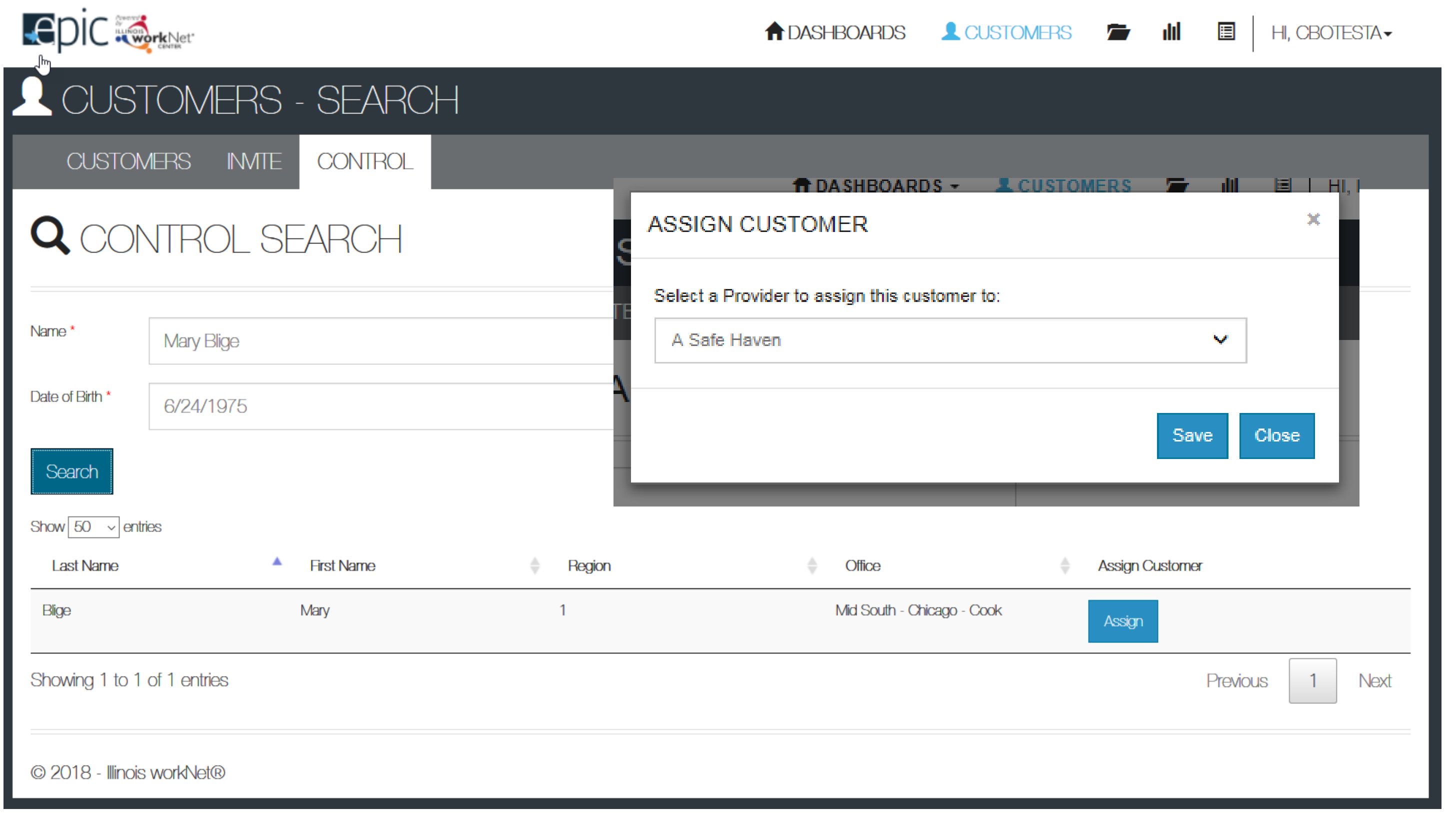
There are two components:

- Grantee/Provider staff enter customer completed services, accomplishments, and current status.
- IDHS statewide staff can enter and view submitted data.

IDHS - Search/Add Customers

1. Log into http://www.illinoisworknet.com/epicpartners.
2. Click link to access EPIC dashboard.
3. Select Control.

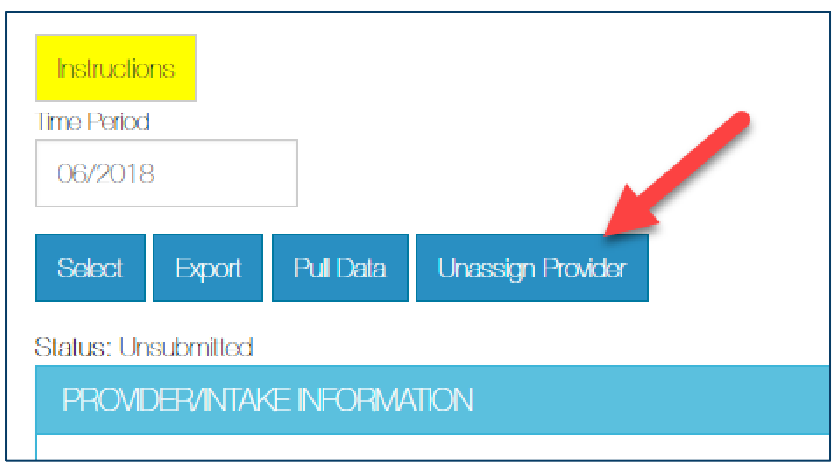
4. Search by Name. Start typing in the field to view a list of possible match customers who are not associated with a provider.
5. Enter date of birth.
6. Select assign and select CBO organization to assign the customer to the appropriate site.



IDHS - Reassign a customer to a different agency

To move a customer to a new agency, access the customer profile. Unassign the customer. The data previously entered will remain viewable.

Search for the customer as in the previous section and assign the customer to the new agency.



IDHS – Update Eligibility

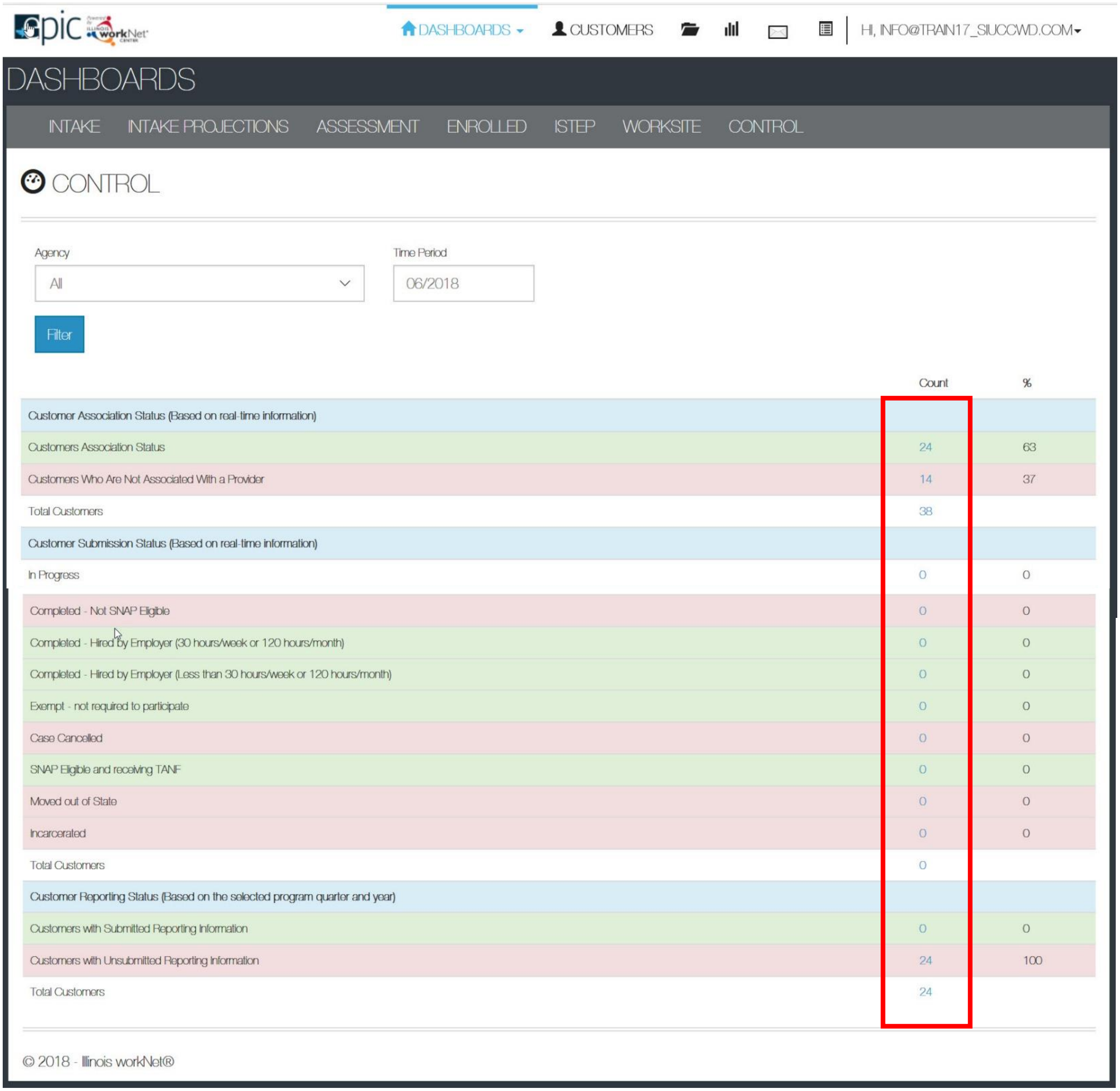
IDHS staff may need to enter information for customers whose case has been cancelled, sanctioned, or re-engaged if a customer is still *In Progress*. All other information should be obtained from staffing results. If a CBO does not have appropriate date information regarding eligibility to complete a customer reporting month, contact the local IDHS representative.

Access Control Group Dashboard

1. Select Dashboards.
2. Select Control.
3. Select the number associated with a dashboard line item to access a filtered list of customers.

IDHS staff will be able to see the customers who have not been assigned to an agency.

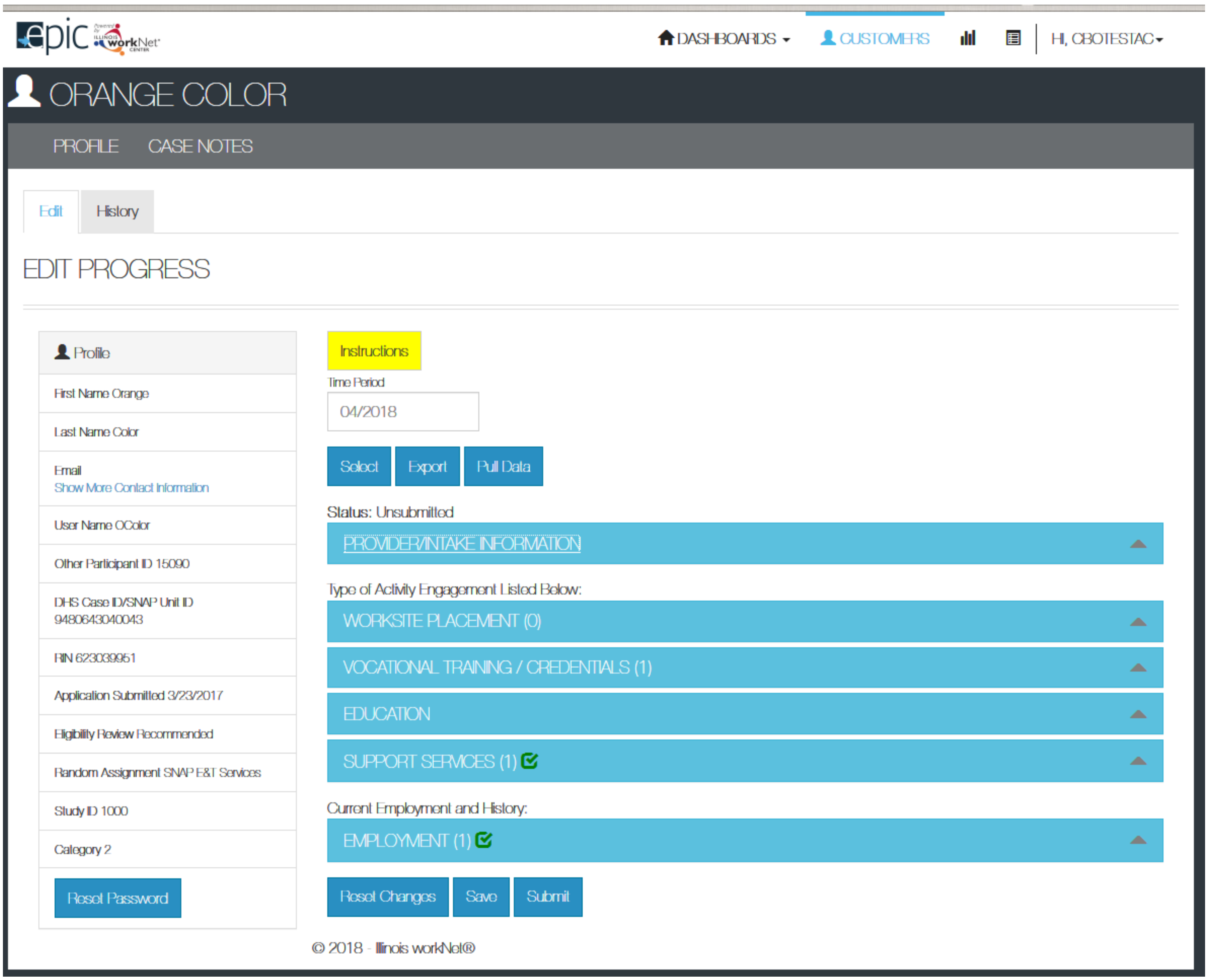
Rows designate customers who are In Progress, Exempt, Completed with Employment, or Completed -Not SNAP eligible.



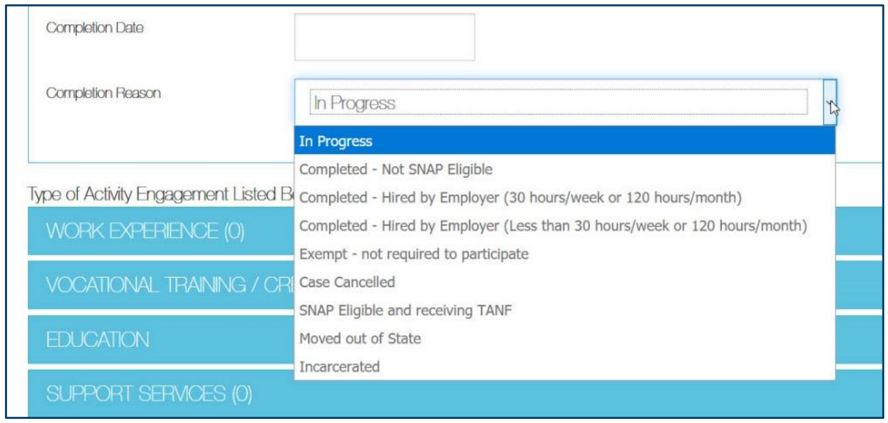
Update Customer Progress

Customer progress can be entered/updated at any time during the reporting period until it is submitted for approval. Once you have submitted the report or the new reporting period starts, the reports cannot be updated. Reporting periods are monthly. At the top of the page, select the appropriate month/year for which you are reporting for these items: Provider/Intake Information, Education and Vocational tabs. Work Experience, Support Services, and Employment will automatically report to the proper period when start and end dates are entered.

1. Go to the list of customers and select the customer's Progress link.



2. On the Edit tab:
    a. Provider/Intake Information, Education, and Vocational Training all require the user to select the month and year for the record to be properly saved.
    b. Enter the related Provider/Intake information for the month, such as: Orientation Date/Status, Conciliation Date, Conciliation Agreement / Recommend Sanction, Re-engage date, Sanction date, Case Cancelled, Assessment information, and Completion reason. When entering an item that includes a completion, like Case Cancelled, enter the information in that section as well as the



Completion information section. If the date or reason is not included in the monthly staffing report documentation, contact the local IDHS representative so they may enter the information before submitting that monthly report. *Ensure the box "Not Applicable" is not checked if trying to add conciliation, re-engage, re-assessment, sanction, case cancelled, or re-assessment dates.*

c. Pull Data Button –replaces the information with the *previous* month's information. For example, if data for the month of July is entered that includes vocational training that ends in December, select August for the Time Period, click the Select button, then click the Pull Data button. All the information from July will now appear in the associated fields for August. To return to any other period, select the Month/Year desired, hit the "Select" button.
d. Reset changes – will remove the most recent data added to an entry or edit to the originally entered information, unless it has been submitted.
e. When entering information that spans several months, entering a start date and end date will produce the data in the correct period. If no end date is entered, the item will continue to show in succeeding months for edit/review.

3. Enter activity information for the following areas when applicable to the reporting period:
   a. Work Experience
      i. Wage information is required for Earnfare.
      ii. Job Readiness and Job Search activities are not stand-alone activities. They must be coupled with either training, education, work experience, or community work.
      iii. If the person withdraws, a reason must be entered.
   b. Vocational Training – select from an existing provider, or manually enter a provider that does not appear when clicking the "Lookup Providers" link. *Enter the smallest keyword to yield the largest number of search results. For example, enter weld or nurse instead of Certified TIG Welding or Basic Nurse Assistant to find more programs.*
      i. Add credentials that were earned. They will appear in the proper period. Look for it in the appropriate period before entering an item a second time.
   c. Education - select from an existing provider, or manually enter a new one. Include all required fields.
   d. Support Services – when selecting Other support services for an item not listed, a text box will open requiring a reason.
4. Enter employment for the reporting period.
5. During the month that is being reported, enter changes and Save the information.

6. To add additional information during the month, visit the customer Progress Page, select History tab, select View by the month's information requiring change, enter the data. Monthly reports can only be edited if the report has not been submitted.
7. **At the end of the month** click Submit to enter the data for the entire month.

View Customer Past Reports

1. Go to the list of customers and select the customer's Progress link.
2. Select the History tab to view past reports for the individual customer.

Enter Customer Case Notes

Case Note tool can be used to document customer case notes. Since this is only a reporting tool, it is advised that when entering a case note the option to "Save as a case note without sending a message/email" is selected.

1. Go to the list of customers and select the customer's Progress link.
2. Select the Case Note tab to enter case notes.