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## 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 Only control group customers who have not withdrawn from the study are included in this tool.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](mailto: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.

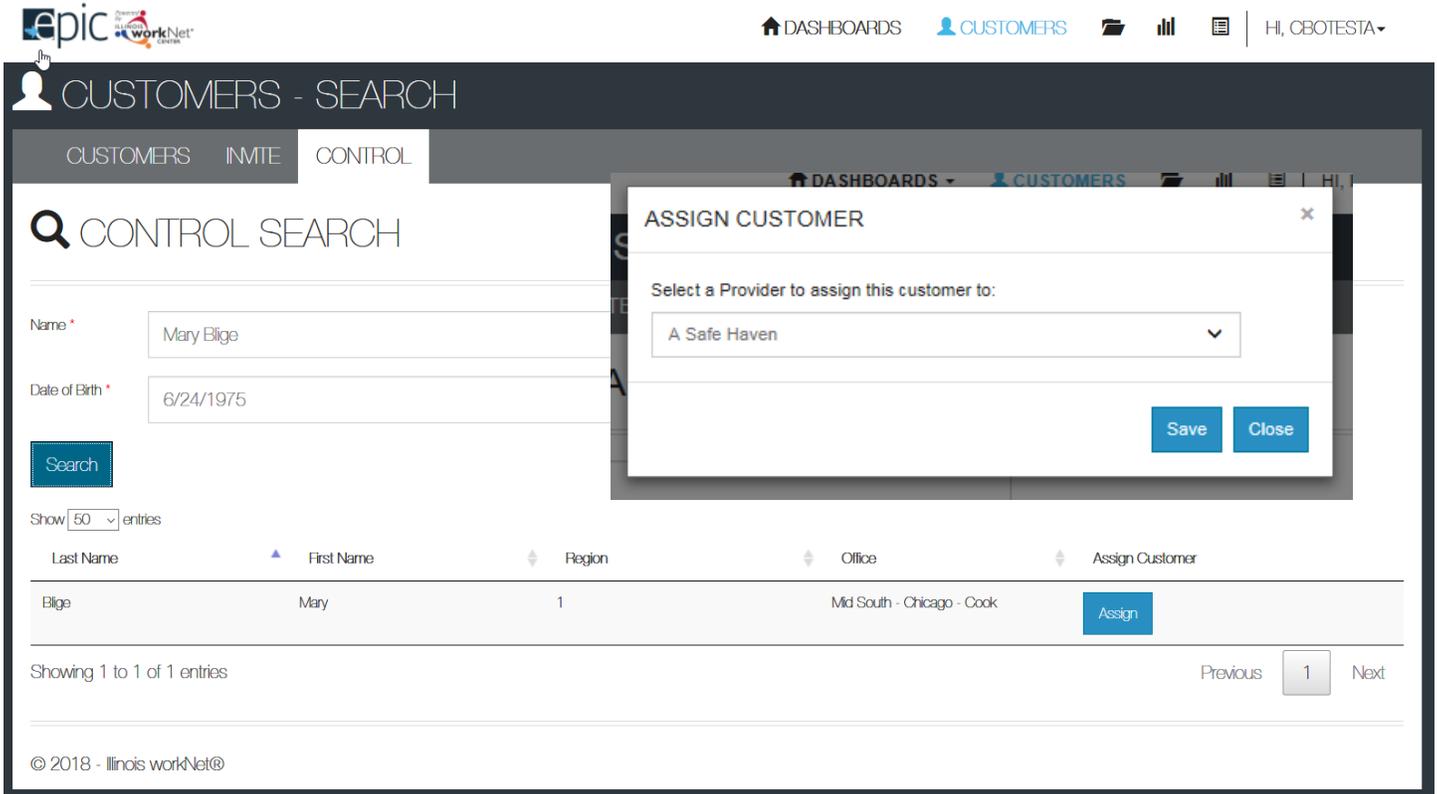
## IDHS - Search/Add Customers

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

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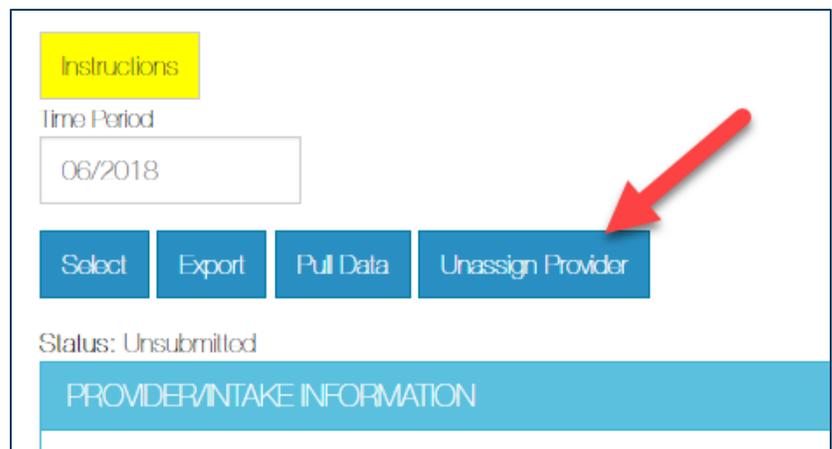
4. Search by **Name**. Start typing in the field to view a list of possible match customers who are not associated with a provider.
5. Enter **date of birth**.
6. Select **assign** and **select CBO organization** to assign the customer to the appropriate site.



## 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.

**DASHBOARDS**

INTAKE INTAKE PROJECTIONS ASSESSMENT ENROLLED ISTEP WORKSITE **CONTROL**

**CONTROL**

Agency: All Time Period: 06/2018

Filter

	Count	%
<b>Customer Association Status (Based on real-time information)</b>		
Customers Association Status	24	63
Customers Who Are Not Associated With a Provider	14	37
Total Customers	38	
<b>Customer Submission Status (Based on real-time information)</b>		
In Progress:		
Completed - Not SNAP Eligible	0	0
Completed - Hired by Employer (30 hours/week or 120 hours/month)	0	0
Completed - Hired by Employer (Less than 30 hours/week or 120 hours/month)	0	0
Exempt - not required to participate	0	0
Case Cancelled	0	0
SNAP Eligible and receiving TANF	0	0
Moved out of State	0	0
Incarcerated	0	0
Total Customers	0	
<b>Customer Reporting Status (Based on the selected program quarter and year)</b>		
Customers with Submitted Reporting Information	0	0
Customers with Unsubmitted Reporting Information	24	100
Total Customers	24	

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## 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.

The screenshot shows the EPIC system interface. At the top, there is a navigation bar with 'DASHBOARDS', 'CUSTOMERS', and a user profile 'HI, CBOTESTAC'. Below this is a header for 'ORANGE COLOR' with tabs for 'PROFILE' and 'CASE NOTES'. The main content area is titled 'EDIT PROGRESS' and has two tabs: 'Edit' and 'History'. On the left is a profile sidebar with fields for First Name (Orange), Last Name (Color), Email, User Name (OColor), Other Participant ID (15090), DHS Case ID/SNAP Unit ID (9480643040043), PIN (623039951), Application Submitted (3/23/2017), Eligibility Review Recommended, Random Assignment SNAP E&T Services, Study ID (1000), and Category 2. A 'Reset Password' button is at the bottom of the sidebar. The main content area has an 'Instructions' section with a 'Time Period' dropdown set to '04/2018' and buttons for 'Select', 'Export', and 'Pull Data'. Below this is a 'Status: Unsubmitted' section with a dropdown menu showing 'PROVIDER/INTAKE INFORMATION'. Underneath is a section for 'Type of Activity Engagement Listed Below:' with a list of categories: 'WORKSITE PLACEMENT (0)', 'VOCATIONAL TRAINING / CREDENTIALS (1)', 'EDUCATION', and 'SUPPORT SERVICES (1)'. Below that is a section for 'Current Employment and History:' with a dropdown menu showing 'EMPLOYMENT (1)'. At the bottom of the main content area are buttons for 'Reset Changes', 'Save', and 'Submit'. The footer of the page reads '© 2018 - Illinois workNet®'.

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

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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.*

The screenshot shows a web form with the following fields and options:

- Completion Date:
- Completion Reason:  (dropdown menu open)
- Type of Activity Engagement Listed Below (checkboxes):
  - WORK EXPERIENCE (0)
  - VOCATIONAL TRAINING / OTHER (0)
  - EDUCATION (0)
  - SUPPORT SERVICES (0)

The dropdown menu for 'Completion Reason' contains the following options:

- In Progress (selected)
- Completed - Not SNAP Eligible
- Completed - Hired by Employer (30 hours/week or 120 hours/month)
- Completed - Hired by Employer (Less than 30 hours/week or 120 hours/month)
- Exempt - not required to participate
- Case Cancelled
- SNAP Eligible and receiving TANF
- Moved out of State
- Incarcerated

- 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.

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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.

The screenshot shows a web application interface with a navigation bar at the top containing 'DASHBOARDS', 'CUSTOMERS', and 'HI, INFO'. A modal window titled 'ADD CASE NOTE' is open, featuring a text input field labeled 'Add your message'. Below the input field are two columns of radio button options. The first column, 'Send Case Note As:', includes three options: 'As Illinois workNet Message', 'As Illinois workNet Message and Email', and 'Save as case note without sending a message/email'. The second column, 'Send Message/Email to:', includes three checkboxes: 'Customer', 'Eligibility Review Team / DHS Case Worker', and 'Illinois workNet Team'. A blue 'Add Case Note' button is positioned at the bottom left of the modal. At the bottom of the page, a status bar indicates 'Showing 0 to 0 of 0 entries' and 'No data available in table'.