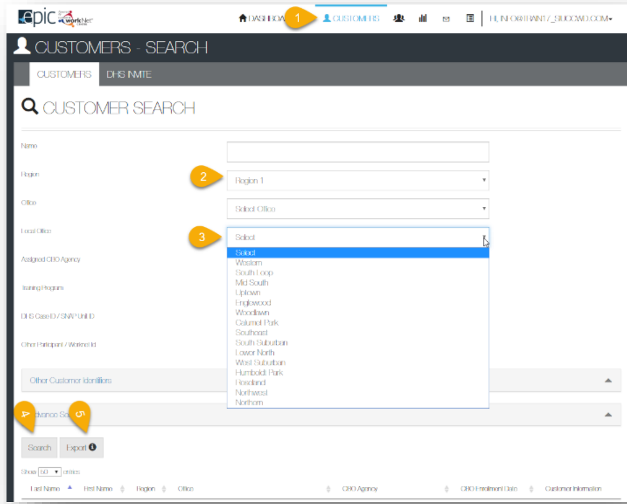
Customer Search



1. Log into your EPIC dashboard and **Select** the Customers tab.
2. **Select** the region, if you have access to more than one region.
3. If you have access to more than one office, **Select** the FCRC or local office (if in Region 1 - *an additional box will open that allows you to select a local office for filtering.)*
4. **Search**.
5. **Export** your customer list. All exported lists of data include all information that has been entered to date in a customer file.

Additional search parameters to filter your list by include:

- Customer Name
- Assigned CBO Agency
- Training Program
- DHS Case ID / SNAP Unit ID
- Other Participant / workNet ID

Other Customer Identifiers

- RIN number
- EPIS Study ID

Advanced Search – with date range and additional options from which to select

- Orientation Information
- Declines to Participate
- Application Status
- Category
- NOCTI Status
- Eligibility Status
- Consent Status
- Follow-up Dates
- Random Assignment Group
- CBO Assignment
- Training Program Enrollment
- Language Spoken
- CBO Enrollment Verification Status
- 2151A Form and Progress Information
- CBO Status
- Worksite Placement
- Education Model
- Work-based Learning
- Post Employment Services
- Completion Status and Reason
- Personal Development Status and Steps
- Career Planning Status and Steps
- Target Occupation Status
- Academic/Technical Status and Steps

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