

DHS Staffing Procedure with CBO

This is a mandatory process in Cook County and may be adopted as necessary for other areas of the state. Policy on Provider FCRC Meetings can be found on the IDHS intranet at [WAG 21-06-08](#) or <http://www.dhs.state.il.us/page.aspx?item=18490>.

DHS requirement	Process in EPIC
<ul style="list-style-type: none"> Every (30) days on a set date. 	<ul style="list-style-type: none"> Post on EPIC partner resources page calendar and schedule every 30 days.
<ul style="list-style-type: none"> Face to face for initial appointment. Following appointments may be held via webinar or phone. 	<ul style="list-style-type: none"> Include meeting location with the calendar information.
<ul style="list-style-type: none"> Upload form 4333 prior to scheduled staffing. 	<ul style="list-style-type: none"> Upload the document via the Upload tab on the CBO profile in EPIC. Visible to CBO & DHS.
<ul style="list-style-type: none"> Have Form 4334 prepared for each customer. 	<ul style="list-style-type: none"> Upload to customer EPIC Progress Page.
<ul style="list-style-type: none"> 2151 and 2151a current. 	<ul style="list-style-type: none"> May review documents on EPIC Progress Page for most current.
<ul style="list-style-type: none"> All notes associated with the case should be present in EPIC at the time of staffing. 	<ul style="list-style-type: none"> Use EPIC case notes, sort by Profile, Progress and Plan and export if necessary.
<ul style="list-style-type: none"> CBO Enrollment Status should be up to date. 	<ul style="list-style-type: none"> Update manually during meeting if necessary.
<ul style="list-style-type: none"> Program Assignment should be current. 	<ul style="list-style-type: none"> Update manually during meeting if necessary.
<ul style="list-style-type: none"> ISTEP plan should be current. 	<ul style="list-style-type: none"> Update manually during meeting if necessary.
<ul style="list-style-type: none"> Follow-up comments by DHS uploaded to CBO. 	<ul style="list-style-type: none"> DHS will complete a summary and upload to the CBO upload tab.
<ul style="list-style-type: none"> CBO follow-up on staffing comments from DHS. 	<ul style="list-style-type: none"> Note any actions taken by CBO on the Progress Page, ISTEP plan or in case notes on EPIC.

Cases requesting removal/change of CBO/sanction should have all supporting documents and documentation in the EPIC system at time review for staffing. If CBO has requested the customer to be switched to another location you must show evidence of communication with Department of Commerce prior to staffing.