



EPIC Program - CBO intake process options for EPIC customers

1. Customer is randomly assigned to EPIC E&T
2. Appointment is scheduled with CBO – if there are no appointments via the scheduling tool, DHS will call the CBO primary contact to arrange a time.

CBO is notified on dashboard and by schedule tool.

Option 1 – Customer does everything as planned.

- Customer attends scheduled appointment.
- Complete intake orientation and enroll customer on EPIC dashboard.
- Within 48 hours of scheduled appointment:
 - CBO submits 2151 indicating customer attended.
 - Mark as “Client Assessment Complete” if customer is completing assessments during initial appointment and determining if customer can be enrolled at a follow-up appointment.
 - Mark as “Client Service Initiated” if customer completes assessments and is determined they can be enrolled during initial appointment.
 - Mark enrolled on progress page
 - CBO submits 2151A with an outline of the planned activities the CBO would like to engage the customer in during their time with the CBO. Include a note in the description box specifying it is the plan.
 - Add planned steps to customer ISTEP.
 - Select Target Pathway, Occupation, and add Goals in Career Planning
- Between 1st and 5th of each month, CBO must submit a 2151A for the previous month’s accomplished activities.
- A 2151A can be uploaded at any time if there is a change in status.
 - Monthly staffing held in Region 1, or as needed in other regions.
- Customer completes all components of ISTEP and is exited on Progress Page.

**Upload 2151 if the customer attended the initial appointment within 48 hours of initial appointment.

Upload 2151A with **planned** activity for remaining hours of the month calculated at 20 hours per week within 48 hours of initial appointment.

Changes to a 2151A must be done in Adobe Reader or Adobe Acrobat, saved and then uploaded.



Option 2 - Customer stops attending after being engaged.

- Customer completes all steps in “Option 1” above.
- After engagement, if customer is non-cooperative / does not attend:
 - Add case note on customer progress page, select option to send as a message, and email to DHS primary contact.
 - Send customer 2846G for conciliation appointment, upload copy to customer progress page.
 - Customer **does not** attend conciliation appointment – 2151A request for sanction and upload to customer progress page.
 - Customer attends appointment – complete DHS form 3392 and upload to customer progress page.
- Customer continues in program and completes all aspects of ISTEP, and is exited on Progress Page.

In the EPIC Partner Resources refer to:

- CBO Intake Flow Chart
- https://www.illinoisworknet.com/partners/EPIC/Documents/EPIC%20CBO-DHS%20intake%20process_Final.pdf
- Conciliation Process for No Contact from Customers
- <https://www.illinoisworknet.com/partners/EPIC/Documents/The%20Conciliation%20Process%20-%20DHS%20responsibilities.pdf>
- Conciliation Process
- <https://www.illinoisworknet.com/partners/EPIC/EPICRestrictedDocuments/Conciliation%20instructions.pdf>

Good faith reasons for missing scheduled appointments are accepted. Poor excuses could result in sanction in mandatory areas.

Good faith reasons:

- Death in the family;
- Illness or incapacity;
- Required court appearance or temporarily in jail;
- Family crisis;
- Emergency situation;
- Lack of reasonable transportation;
- Severe weather;
- Got a job;
- Non-receipt of notice;
- Mandatory test or class for an educational program;
- Inability to read or write.

Option 3 – Customer does not attend initial appointment.

- Customer **does not** attend scheduled appointment.
- CBO submits 2151 within 48 hours of initial appointment indicating “No Contact from Client”.
 - Add case note on customer progress page.
 - DHS begins conciliation process.
- CBO can reschedule customer appointment by phone or email. Mail by US Postal service the updated 2151, allowing 5 days for mail.
 - Case note the updated appointment.
 - Delete original appointment.
 - Enter rescheduled appointment.
- Customer attends rescheduled appointment – follow steps in Option 1.

Customer can agree to an appointment reschedule sooner than 10 days. Revised 2151 needs to notate customer consent to earlier time.



Option 4 – Customer arrives for an unscheduled appointment.

- Customer **does not** attend scheduled appointment
- Customer appears at a later time in the day:
 - Customer has until 5PM on the date of appointment to “show”
 - Reschedule with customer OR Complete the intake orientation.
 - If rescheduling, give revised 2151.
 - Enter case note on dashboard.
 - If completing intake orientation, follow steps in Option 1.

Option 5 – Customer does not attend rescheduled appointment.

- Customer **does not** attend re-scheduled appointment.
- CBO submits 2151 within 48 hours of re-scheduled appointment indicating “No Contact from Client”.
 - Add case note on customer progress page.
 - DHS enforces sanction in mandatory areas.
- In voluntary areas, the reschedule process continues until a customer is in contact with DHS or CBO.

Mandatory Cook County Staffings occur:

- Every 30 days at a set time;
- Bring Form 4333 for each customer;
- 2151 and 2151a should be current on EPIC;
- CBO enrollment status current;
- Program Assignment current;
- ISTEP history current, when applicable; and
- Problem cases documented in case notes.

Optional as needed in other counties.

Any change in type of activity or hours of any activity for the customer is required submission of a 2151A. i.e. customer moves from work search to work experience or training; change from 20 hours in a week to 30 or 40 hours per week. Submit at time of change.

