

## EPIC DHS Webinar 1/06/16

### Agenda

- Intake Projection numbers –
  - Everyone still seems to be adding numbers.
- Intake Dashboard –
  - The following areas in the Intake Dashboard need to be cleaned up and monitored by DHS:
    - Customer Profile Info Needs Finished
    - Ready for Review by DHS Case Worker
    - Needs to be Scheduled for Consent
    - Missed Consent Meeting
    - Not Assigned to a CBO
- Enrolled Dashboard -
  - Covered No Contact, Referral Rejected, and Recommend Sanction Customers. Enrolled - follow-up.
- Primary Contact Messages -
  - Updates have been made to the system to allow for Primary and a backup(s) contact for each office to receive emails for case notes regarding EPIC customers.
- Change Customer Address -
  - Update includes a section for CBO or DHS staff to update address and phone number. An automatic case note will go to the primary DHS contact.
- New Search Filters -
  - In the advanced search results, you can now filter by various sections of the dashboard.
- Last Case Note -
  - When you export customer list, the export now includes the last case note from each of the customers pages, the date it was uploaded, and who uploaded it.
- Declined to Participate -
  - There are 18 customers who need a reason selected. Please complete this by end of day!