

## **Eligibility review must be done before moving on to EPIS**

You must take the time to do the last step of Eligibility Review before you move on to entering their information in EPIS.

## **Entering SSN for customers**

When inviting a customer triple check the SSN you enter before moving on. If it does not match the one you enter in EPIS it will not sync with the system and you cannot move forward until it is resolved.

## **Exempt Customer Status Update**

Do not mark customers as exempt until they have officially been processed as exempt by DHS.

## **Case Notes**

Send case notes via email to the CBO if you need information from them or need them to do something with the customer

## **Dashboard**

Covered the areas in the Intake and Enrolled Dashboard that need to be cleaned up and monitored by DHS.

Intake –

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 –

Referral Pending – Appointment has not been Scheduled

Referral Pending – No contact from customer / recommend conciliation

DHS Review – Recommend Sanction

## **CBO introductions**

Marybeth Lanier from the Cara Foundation & Kreshina Ingram from OAI