



EPIC Client Appointment

Client Name				Initial Appointment Date			
Other Participant ID				DHS Office			
Initial 2151		Date Uploaded					
Service Initiated							
No Contact/No Show				Rescheduled Date			
Referral Rejected				Reason			
Enrolled in EPIC				Program			
Initial Plan 2151A data to be entered							
<i>Activity</i>		<i>Date to Start</i>		<i>Planned Hours</i>		<i>Mandatory customers are required to have 80 hours per month active participation.</i>	
Job Retention							
Job Search/Readiness							
Vocational Training							
Basic Education – ABE							
Basic Education - GED							
Work Experience							
Community Work							
Other							
Progress of Activity				Recommended Action			
Acceptable Progress				No Change/SP			
Other				Other			
Client Working				Supportive Service			
Where				Transportation			
Address							
City, State, Zip							
Job Title				Other:			
Start Date							
Starting Wage		Per		Hours			
Full Time		Part time					
Special Comments:							





ISTEP Steps to Add

Personal Development	Career Planning	Academic/Technical Skills
Not Required (if no steps needed)	Not Required (if no steps needed)	Not Required (if no steps needed)
<i>Check Additional Steps to be Added</i>		
Drug Treatment Referral	Explore jobs, required skill/credentials, and wage information. <i>Career Planning</i>	Improve your English language skills. <i>English Language Proficiency</i>
Low Cost Legal Service	Identify your workplace skills. <i>Career Planning</i>	Attend adult education and literacy classes. <i>Adult Education & Literacy</i>
Utility Assistance	Identify training programs for jobs that match your skills & interests (Employment 101). <i>Career Planning</i>	<i>Bridge means that a contextualized improvement to reading math or language is used.</i>
Food Pantry	Find events in your area to help you prepare for a career. <i>Workshops***</i>	Raise your Math and Reading skills to 8.0 through a Bridge Program. <i>Remedial Training</i>
Health Care Referral	Compare pros and cons for the training programs. <i>Career Planning</i>	Improve your English language skills to 8.0 through a Bridge program. <i>English Language Proficiency</i>
Housing	How are you going to pay for training and support yourself while you are in training? <i>Career Planning</i>	
Transportation	Analyze options. <i>Initial Assessment</i>	Complete EPIC Training Program (CTE/College Credit) <i>Occupational Classroom Training</i>
Car Repairs	Make a plan. <i>Career Planning</i>	Complete EPIC Training Program (Industry-Recognized Certificate Only) <i>Occupational Classroom Training</i>
Child Care Assistance	Get organized. <i>Initial Assessment</i>	Complete EPIC Training Program (Work Experience) <i>Work-based Learning</i>
Disability/Impairment	Prepare a job search plan. <i>Self-directed Job Search</i>	
Mental Health Counseling	Prepare your resume. <i>Self-directed Job Search</i>	Other Items – (These items do not count toward training benchmark)
Community Service	Build your portfolio. <i>Self-directed Job Search</i>	Learn entrepreneurial skills.
Other Services - Clothing	Prepare for interview. <i>Self-directed Job Search</i>	Receive child care assistance.
	Network, Network, Network. <i>Self-directed Job Search</i>	Get assistance to pay for medical exams.
	Research credentials you can earn and the requirements to gain those credentials. <i>Self-directed Job Search</i>	Learn about managing your finances.
	Community Service. <i>Unpaid Work Experience***</i>	Get assistance to pay for transportation.
	NOCTI assessment. <i>Diagnostic Testing</i>	Work with a mentor.
	Job Retention Services. <i>Follow-up Services</i>	Work in a transitional job.
	TABE testing. <i>Diagnostic Testing</i>	Complete a pre-apprenticeship program.
	Other Services. <i>Other Support Services***</i>	Other services.
	Interest Profiler. <i>Self-directed Job Search</i>	Attend a pre-training program.
	Job Club. <i>Job Club***</i>	Improve Math and Reading skills.
	Work Experience Only (plus 4 staff assisted Career Planning items required). <i>Paid Work Experience</i>	Career Foundations.

