

Scheduling EPIC Orientation

- Follow SNAP E&T Engagement Procedures to identify ABAWDs that are interested in EPIC.
 - Review Form Exemptions from 4538 to confirm eligibility.
 - Explain SNAP Engagement options that are JPP, Earn fare and EPIC.
 - Provide a copy of the “What is EPIC” document.
 - Provide a copy of the EPIC Comparison Chart.
- If the participant is an ABAWD, free of exemptions and interested in EPIC, log into the EPIC system to “Invite” the participant to the assigned EPIC Pod office.
- Log into the EPIC system at www.illinoisworknet.com.
- Select “My Dashboard”, “Partner Tools” and click on the “EPIC logo”.
- At the EPIC Dashboard, select “Customers” tab.
- Search to see if they are already registered in the EPIC system.
 - Enter the participants name and select “Search”.
- If the participant is not found in the system, select the “DHS Invite” tab.
 - Enter the participants name
 - Select “Invite” from the drop down menu and select “Search”.
- If the participant is in the system, invite or re-invite them to orientation.
- If they are not in the system, select “Add DHS Customer” and enter the required information.
 - Confirm that all information is correct.
 - Select the blue “Add and Invite DHS Customer” button.
 - Hover over the days on the calendar to see if slots are available.
 - Select a date and time that is available for EPIC orientation.
 - Select the “DHS Invite” tab.
- Download and use the fillable “Customer Intake Form” and copy and paste the information from EPIC into the “Customer Intake Form” and give it to the participant.
 - This should include the Day, Time, Location, Username and Password.
 - If the option to print the form is not available, have blank copies of the form available and legibly hand write the information on the form.
- If the system freezes and the customer’s name disappears, reload/refresh the page.
 - Select the “DHS Invite” tab.
 - Enter the participants name and select “Search”.
 - Select the blue “Invite” button.
- Prepare and give the participant a 1721 referral to the EPIC Pod.
 - Indicating the time and location of the EPIC orientation.
 - Noting that the orientation will take up to 3 ½ hours
 - Indicating that the participant should bring work history and education history information.
- The participant should leave with the following:
 - 1721**
 - Customer Intake Form**
 - EPIC flyer**

Identifying EPIC Orientation-Missed Orientation

- Log into the EPIC system at www.illinoisworknet.com.
- Select “My Dashboard”, “Partner Tools” and click on the “EPIC logo”.
 - At the EPIC Dashboard
 - Select “Intake”
 - Under Missed Orientation, select the “number” of participants indicated.
 - Select “Export” to obtain the Excel workbook listing (enable editing) and open the file.
 - To obtain the participants in your office only,
 - Select “DHS Case ID” and search on the DHS office number (ex 201).
 - When printing the list, exclude unnecessary information (SSN) and include the user names and passwords of each participant.
 - Start the conciliation process for participants who have missed orientation.
 - Go to the participant “Profile” and select “Intake Activities”.
 - Go to 1.1 Orientation Date
 - Select Conciliation/Sanction process started and select “Save”.
 - Issue a 2846G to return to the Pod office
 - Create an **EPIC case note** to document this step.

Re-Scheduling EPIC Orientation No-Shows

- Log into the EPIC system at www.illinoisworknet.com.
- Select “My Dashboard”, “Partner Tools” and click on the “EPIC logo”.
 - Select “Customers” and enter the participants name and “Search”.
 - Select “Profile”.
 - Go to “Intake Activities”
 - Go to 1.2 Schedule for Follow-up
 - Select “Scheduled for follow-up to complete orientation process”
 - Create an **EPIC case note** to document this step.

Day before Orientation Day

- Go to the EPIC Dashboard to download and print a list of the participants that are scheduled for orientation the following day.
- Download the Excel workbook and print a “Scheduled for Orientation” listing of participants scheduled for orientation from the feeder office or scheduled by the Pod office.
 - At the EPIC Dashboard, select the “Scheduled for Orientation” tab.
 - Select Advance Search, Click on the Orientation Start Date Calendar to select the Orientation day and search.
 - Select Export to obtain the Excel workbook listing.

- When printing the list, exclude unnecessary information (SSN) and include the user names and passwords of each participant.
- Prepare copies of the EPIC Comparison Chart, “What is EPIC” document and blank “Customer Intake Forms”
- Have ear buds on hand.

Orientation Day

Preparation

- Determine what staff member will manage the EPIC Orientation lab. (Only one person should be assigned daily to):
 - Provide the initial presentation
 - Play the orientation videos
 - Manage the flow of EPIC customers
- Prep orientation room by turning on the WIFI Hot Spot and laptops.
- Turn on the projector/monitor and the laptop attached.
- Make sure that the orientation and EPIS informed consent videos are ready to be viewed.
- Log all of the laptops into “ilepic.com” in the Chrome browser.
- Place new ear buds by each laptop.
- Place pen and paper by each laptop for the participants to write on their “Customer Intake Form” and indicate their Top 4 Career Survey choices.

When the SNAP E&T participants arrive

- Check in attendees by obtaining the 1721s and checking them off from the printed “Scheduled for Orientation” Excel listing printed the day prior.
- If the participant is a walk-in, follow the **Scheduling EPIC Orientation** procedures above.
 - Make sure that each participant has their “Customer Intake Form” that was provided by the feeder office.
 - If not, prepare a new “Customer Intake Form” using the user names and passwords on the “Scheduled for Orientation” Excel listing.
 - Make an **EPIC folder** indicating last and first name of the participant.
 - On the Outside of the EPIC folder write:
 - Orientation Date
 - Program: EPIC or SNAP E&T
 - CBO and program selected
- In the open session, welcome the participant to the orientation.
- Review the list of SNAP E&T exemptions on brochure Form 4538.
- If they are no longer eligible, send them to a caseworker to be assigned to a JPP or Earn fare.
- If they are still eligible and interested move them along in the EPIC process.
- Prepare a 1721 for a return appointment for those that want to participate at a later date.

- Start the videos; ask if there are questions between each of the two videos.
 - This will take approximately 15 minutes.
- After all three videos, ask the participant, “Do you want to participate?”
 - If NO, have the participant fill out the back page of the “Customer Intake Form” indicating their reason for not participating.
 - Direct the participant to a caseworker to be assigned to a JPP or Earn fare.
- Move the participants who want to continue to computer tables and laptops.
- With the ear buds, have the participant go to Step 2: To complete the Skills and Interests career survey.
- Have the participant go to Step 3: To complete the questions to identify Training Programs of their interest.
 - Region
 - Industry (Select industries with training options indicated.)
 - Circumstances
 - Zip Code
- Have the participant go to Step 4: To complete the EPIC Application.
- Have the participant listen to the reading of the Consent Form.
- Update profile in EPIC if needed (i.e. add RIN or DHS Case ID, etc.)
- Once the participant finishes listening to the consent form, begin Step 5, the **Follow-up Process** below.

Follow-up Process

- Log into the EPIC system at www.illinoisworknet.com.
- Select “My Dashboard”, “Partner Tools” and click on the “EPIC logo”.
- Select “Customers” and enter the participants name and search.
- While in EPIC, the DHS caseworker reviews Application and recommended training programs with the participant.
 - Allow the customer to see the computer screen to review the training programs that they are eligible for.
- DHS caseworker and participant select a training program based upon application, distance and industry.
- DHS caseworker **must** complete the “**Eligibility Review**” before Random Assignment in EPIS.
- DHS caseworker **must** check www.familywatchdog.us or Illinois State Police Sexual Offender Registry if the program does not permit sexual offenders.
- DHS caseworker **verifies** if the participant
 - Is still SNAP eligible.
 - Not eligible.
 - Wishes to decline participation because of program choices.
- DHS caseworker selects one of the 3 training models based on the education level of the participant.
 - Model 1/Adult Education/ ESL Bridge Program
 - Model 2/Accelerating Opportunity plus Illinois Career and Academic Prep System (I-CAPS)
 - Model 3/Short-term Occupational Skills Training

- DHS caseworker selects the Community Based Organization (CBO) based on the training program selected by the participant.
- DHS caseworker selects the blue "Save" button.

Random Assignment

- Ask the participant if anything has changed on their case since they last spoke with a caseworker.
- Log into EPIS at www.snapet-epis.com.
- Check to make sure this is a new participant.
- Select "Participants" and enter the participants first and last name and select "Search".
- If this is a new participant, select the "Enroll Participant" button.
- Enter the new participant information into EPIS. *(Note that the following information cannot be changed after you select "Continue"*)
 - **Ask for and verify the SSN with the participant.**
 - **Ask for and verify the birthdate with the participant.**
 - **Copy and paste "DHS Case ID" and "Other Participant ID" from EPIC into EPIS.**
- If the participant viewed the consent recording, review EPIC Informed Consent Document Review Checklist.
 - If not, read Informed Consent.
- Print and give participant copy of informed consent document.
- If NO to consent, indicate "Declined to Participate" in EPIC Profile Details, refer to JPP or Earn fare.
- Complete survey questions with participant.
- Validate form. Correct any errors.
- Select the Randomization button.
- Go back to EPIC and select the "Assignment" tab to ensure that the EPIC or SNAP E&T participant forms are available.
 - If there are no EPIC or SNAP E&T participant forms available, verify DHS CASE ID and Other Participant ID are correct in EPIS.
 - If this correction does not work, contact your EPIC site manager.
- If the participant is selected for the EPIC treatment Group,
 - Review CBO/program choices and select.
 - Schedule intake orientation appointment with CBO with available dates on the calendar.
 - If no appointments, call CBO.
 - Download and print two copies of the 2151 form.
 - Have the participant sign the form.
 - Download and print two copies of the DHS assignment letter.
 - Download and print two copies of the training program information.
- The participant should leave with the following:
 - **2151 referral**
 - **Notification letter**
 - **Training program information**
 - **Consent form**

- Place a copy of these forms in the folder.
- If the participant is selected for the SNAP E & T Control Group,
 - Download and print two copies of the DHS assignment letter.
 - Give the participant a copy of the letter.
 - Participant should be placed in JPP or Earn fare.
- Document EPIC participation in the DHS system.

Case Notes

- In EPIC, add case notes that document any DHS procedures or issues the participant may experience during the EPIC engagement process.

Quick Reference

Topic	Resource	Telephone
EPIC-Illinois WorkNet Account Issues, SSN and syncing problems	epic@IllinoisworkNet.com Olivia.Griesheim@siu.edu	217-303-5855
EPIS -Technical Problems	SNAPETPilotEvaluation@mathematica-mpr.com	844-762-7381
EPIC Process Assistance, EPIS-Account Request and resetting password, syncing problems	Deidre.Wesley@Illinois.gov	773-881-2943
EPIC Process Assistance	Areli-Varela-Coleman@Illinois.gov	773-881-6889
EPIC Process Assistance	Lisa.Sparks@Illinois.gov	773-881-6887
EPIC Process Assistance	Erica.Hubbard@illinois.gov	773-881-6888
EPIC Process Assistance	Ashley.A.Miller@illinois.gov	773-881-2943
EPIS Assistance	Keith.Olejniczak@mdrc.org	510-844-2306