Enrolled Customer Progress Page
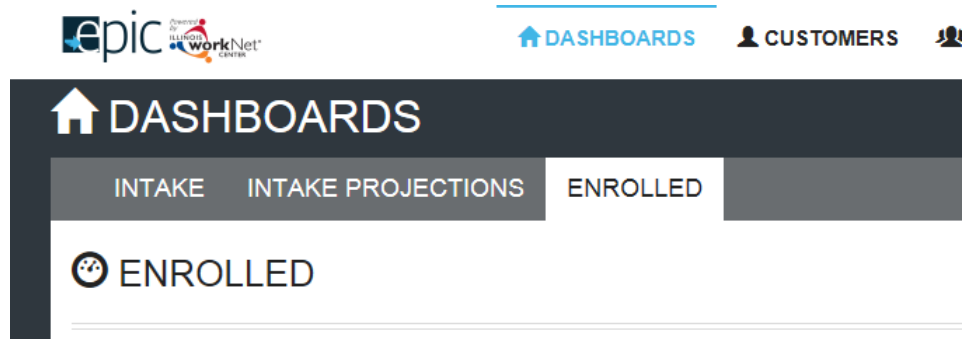
There are two ways to access an Enrolled Customer's Progress Page.

Option 1 – Dashboards

Select Dashboards at the top of the page, and then select Enrolled to view the dashboard.

Click on the number associated with that line.

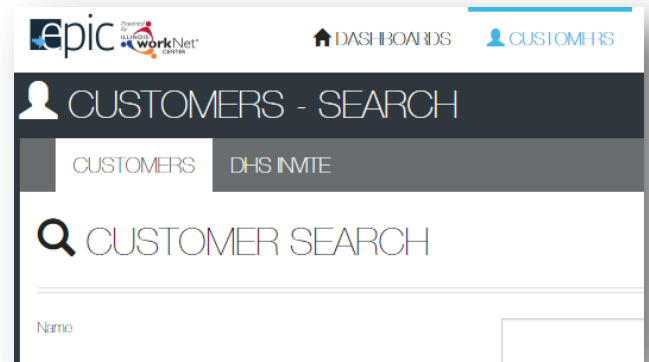A list will show the participants associated with that specific selection.

Option 2 – Search Customer

Select the Customers tab to begin a customer search. Enter the participant's name or other search parameters.

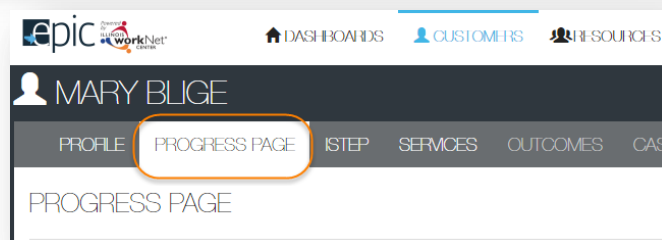Click Search. A list will appear with all matching results.

Either option you choose will present a list that looks like this. >>

Select Progress to go directly to the participant's progress page. Once you're on the participant's profile you can easily move from their profile to progress page, then to plan, services or outcomes.

Progress Page

The progress page is where the CBO tracks the progress of the participant and initiates thetransmittal of forms to the IDHS office.

1. After receiving the initial 2151 referral form, the CBO can scan and upload it after the initial visit with the participant. *Note: The orange bar will appear if the initial 2151 refferal form is not uploaded. If the customer did not bring it with them, the CBO can download a copy of the referral form from the Assignment Tab in the Profile section.*
2. Designate the Status of the appointment – either Scheduled, Customer did not show for the appointment, or Requesting IDHS follow-up, client has missed multiple appointments or could not be reached.
3. Select an initial intake appointment date.
4. Select an enrollment status – Enrolled, Not Enrolled or Exited.
5. Select the program in which you are placing the participant.
6. Download the 2151A form, it will have the participant's information already in the appropriate fields.
7. Open the document in Adobe Reader, if you need to make any changes to the form you can do so here, then save it to your computer.
8. Select Upload 2151A form button.
9. A new window will open – browse your computer for the file that you just saved.
10. Make any comments about the form.
11. Press the Upload button.
12. You will see a message that the form successfully uploaded. If you see a red box, ensure that you see the information you entered in the form is correct by reopening your document in Adobe Reader.

If you need to download Adobe Reader click here:
http://get.adobe.com/reader/