

# **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.

Last Name	First Name	Region	Office	CBO Agency	Customer Information
Blge	Mary	1	SNVP E&T Office - 1642 W. 59th Street Chicago	A Sale Haven	Profile - Progress - Han
Bullock	Sandra	1	SNVP E&T Office - 1642 W. 59th Street Chicago	A Sale Haven	Ptolie - Progress - Han
Dawis	Justine	1	SNVP E&T Office - 1642 W. 59th Street Chicago	A Sale Haven	Ptolie - Progress - Han
Duck	Daisy	1	SNVP E&T Office - 1642 W. 59th Street Chicago	Calholic Charilies	Piolie - Progress - Han
Gimore	Loroli	1	SNVP E&T Office - 1642 W. 59th Street Chicago	Calholic Charilies	Picilie - Progress - Lian
Hamin	Gerard	1	SNVP E&T Office - 1642 W. 59th Street Chicago	A Sale Haven	Profie - Progress - Flan





### Enrolled Customer Progress Page April 2016 v2\_FINAL

## **Progress Page**

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

- After receiving the initial 2151 referal 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.
- 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: <a href="http://get.adobe.com/reader/">http://get.adobe.com/reader/</a>

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