**Purpose:**

This review is to add a human holistic approach to a system generated recommendation. The DHS case worker will look at the customer application details and see if there are any red flags to eliminate a system generated recommendation. They can also look at the application and the non-match training programs to see if there really is a potential match. Based on their analysis they can discuss the options with the customer to make a good referral to a training provider.

**Eligibility Review Team Checklist:**

Review the customers system generated recommendations and application.

☐ Is distance/time to travel reasonable? Is the training offered in two locations? For example, is classroom training at one location and worksite training at a different location?

☐ Is the training accessible by public transportation? The customer might indicated that is how they would need to travel to the location.

☐ Is the length of training reasonably close to the length of training they are willing to complete?

☐ Does the training program identify any industry credentials that are a pre-requisite to get into the program? If so, does the customer meet the minimum requirement?

☐ Does the customer match the training programs target audience? Some training programs are focused on assisting customers with English as a second language.

☐ To verify that the customer does not have a sexual offense use http://www.familywatchdog.us/ to verify they are not on a sexual offender list.

☐ Record Case Notes – If the person meets the minimum baseline requirements, then give them the opportunity to participate. If you have any concerns – highlight them in the case notes.

**How It Works:**

An eligibility review is conducted by, a minimum of, one DHS EPIC case workers in combination with system generated recommendations. The system generates an initial recommendation based on comparing the customer's application and training program "EPIC Hard Stops". The customer application must meet the hard stop requirements.

| Hard Stop | How A Recommendation Is Determined |
|---|---|
| Training Program Industry | Customer can select up to 3 industries in their application. At least one needs to match up to a training program industry in their region. |
| Potential Need for a Remediation/Bridge Program | Customer will be recommended to only training programs offering Remedial/Bridge program if: |
| | The customer indicates they have less than a high school diploma (or equivalent) in their application. |
| | AND |

| | The training program indicates they require at least a 6th grade level for both reading and/or math. |
|---|---|
| Pass Required Medical Tests | Customer indicates if they can pass medical tests in their application.  If they meet the minimum requirement of the training program, the program will be recommended. |
| Drug Test | Customer indicates, in their application, they can pass or are willing to make changes to pass a drug test.  If they meet the minimum requirement of the training program, the program will be recommended. |
| Vision Requirement | Customer indicates their vision status in their application.  If they meet the minimum requirement of the training program, the program will be recommended. |
| Moving Violation Requirement | Customer indicates their moving violation status in their application.  If they meet the minimum requirement of the training program, the program will be recommended. |
| Valid Driver's License Requirement | Customer indicates their driver's license status in their application.  If they meet the minimum requirement of the training program, the program will be recommended. |
| Background Check Requirement | Customer indicates their misdemeanor/felony/probation status in their application.  If they meet the minimum requirement of the training program, the program will be recommended. |
| Open Training Program Slots | If the training program has openings and the customer meets the minimum requirement of the training program, the program will be recommended. |

**Timeframe:**  Same day as the customer's orientation date.

**Getting Started**

1. Sign in to the EPIC dashboard.
2. Go to the eligibility review section. Select the number in the "Ready to Review…" row that corresponds with your position.
3. Locate the individual – Click Profile in the far right column.
4. Go to the Eligibility tab.

**Make a Recommendation**

1. The left column is the basic customer information.
2. Review the customer baseline requirement information to see the application version.  If you need to see why other programs were not recommended select the link to view non-recommended programs.

**Eligibility Review**

| | | | |
|---|---|---|---|
| ⚠ Ready for Review by DHS Case Worker ❸ | 2 | 15% | |
| Referral Recommended and Ready for Random Assignment ❸ | 12 | 92% | 92% |
| Referral Not Recommended ❸ | 1 | 8% | 8% |
| DHS Indicated Customer NOT Currently SNAP Eligible ❸ | 0 | 0% | 0% |
| Declined to Participate ❸ | 0 | 0% | 0% |
| Total Customers in Eligibilty Review | 13 | | |

📄 View Baseline Requirements ▼

*Take a look at the key information provided in the customer's application. This will help you understand why certain programs were recommended and others were not.*

Application Version: 1

Remediation/Bridge Program is recommended since:
- Highest Grade Level Completed: H.S. Senior - Did not Attain H.S. Diploma
- NOCTI Status: NOCTI Has Not Been Completed
  - Reading: 0%
  - Math: 0%
  - Writing: 0%

View non-recommended training programs

3. Review the recommended programs and check program(s) you recommend.
   - If the customer has a version 1 application, you may see others provided training program recommendations. This is no longer required. Only the case worker is required to make a recommendation.
   - If the customer has a version 2 application, you will only see an option for the case worker is to make a recommendation.

### ☑ Recommend Training Programs

*Select one or more training programs or choose the not recommended option. If the program does not allow sexual offenders, you must check www.familywatchdog.us to make sure they are not on the list.*

| DHS Regional Program Staff | DHS Case Worker | Commerce Program Staff | Training Program | Length of Training | Accessible by Transportation | Distance |
|---|---|---|---|---|---|---|
| ☑ DHSadmin Team1 4/20/2016 | ☐ | ☐ | HHC American Apprenticeship Program (No GED/Diploma) | 38 weeks | Bus Driving | 31.42 miles |
| ☐ | ☐ | ☐ | Not recommended for any of the above programs | | | |

### CBO DETAILED INFORMATION ✕

**Agency Name:** Homework Hangout Club, Inc.

**Remediation / Bridge Program:** Yes

**Projected number of participants:** 25

**Current number of participants:** 2

**Address:** 249 S Webster Suite 100 Decatur, IL 62521

**Industry:** Architecture and Construction

**Training Program:** HHC American Apprenticeship Program (No GED/Diploma)

**Description:** Hands-on, pre-apprenticeship training with building trade union partners (Painters, Plumbers, Electricians); includes academic, life skills, financial literacy, and computer applications training, along with forklift certification, OSHA 10-hour, and Flagger's certification. Participants without a GED will initially receive instruction towards obtaining a GED prior to beginning pre-apprenticeship training. Eight weeks of work experience is included as a part of the training.

**Length of Training** *(The length o math or reading skills.):* 38 week

**Goal:**
High School Equivalency Credential
Certificate of Completion
Industry Recognized Crede

4. Select the training program link to see the program description, course information, and baseline requirements.

5. Review the options with the customer.
   - Refer to the application as needed to see their 1st, 2nd, 3rd choice in industry.
   - Review distance and travel needs.
   - Review length of training

6. Select the options that may interest them.

NOTE: If you do not see any recommended programs look at the non-recommended programs (in the previous section) and update the customer application as needed.

View non-recommended training programs

| Agency | Program Name | Industry | Remediation / Bridge Program | Medical Tests | Vision | 3 or More Tickets | Valid License | Background Check |
|---|---|---|---|---|---|---|---|---|
| Springfield Urban League | Certified Nurse Assistant Program | Yes | Yes | No | Yes | Yes | Yes | Yes |
| Springfield Urban League | Truck Driving Training | Yes | Yes | No | Yes | No | No | Yes |
| Homework Hangout Club, Inc. | HHC Food Sanitation/Management Training (No GED/Diploma) | No | Yes | Yes | Yes | Yes | Yes | Yes |

**Update a Customers Application**

1. Click on the Application Information.
2. The left column shows the basic customer information.
3. The information shown is the information that was entered on the customer's application.
4. Until the time that a person is recommended for assignment, you have the ability to change information from the initial application.
5. Go back to the Eligibility tab and review the system generated recommended programs.
6. Select the training program link to view program baseline requirements.
7. Click on the check box to recommend a program OR check the option "Not recommended for any of the above programs."  More than one program can be recommended. Your recommendation will automatically save.

8. Verify eligibility and complete the predictive questions and save the recommendation.  Only one person needs to complete the predicative questions.



Model 1:  Bridge program for reading/math and English as a second language

Model 2: Adult Basic Education and Career Technical Education for those who need to earn a high school equivalency, industry-recognized certificate, or other training credentials

Model 3: Short-term skills training for those who don't lack basic educational skills, but need skills upgraded to obtain a better paying job in a high demand career track

**Note:**  If the program does not allow sexual offenders, you must check www.familywatchdog.us to make sure they are not on the list.

9. Staff have the ability to add notes as case notes at the top of the page.  You can save a case note and choose to send it as a message/email to the other DHS staff and/or the customer.  A message/email should be sent using case notes so that record stays with the customer.

CASE NOTES(1)▲