



What is the EPIC Enrolled Customer dashboard? The intake dashboard provides real-time data showing EPIC customer’s enrollment and progress status. This included:

- Initial Appointment Status
- Enrollment/Progress Required Status
- Change in Activity/Monthly Update Status

It includes pass/loss rate data for section/components of the program. Partners can use the data in the dashboard to access filtered lists of customers for easy access to customer program information.

Who can use the dashboard? Only staff that has been given access to the program can view the dashboard. Access to customer information is restricted even further through the use of roles.

- **DHS and Commerce Admin Roles-** Statewide staff sees statewide info and use a dropdown menu to see specific regional information.
- **Career Planner/Case Worker Role-** Staff can see counts for their region/office which provides easy access to customer information. They can select result links to get filtered lists of customers that meet the criteria for that section of the dashboard. From that point, they can access detailed customer information.
- **CBO Partner Roles-** Staff can see counts for their organization which provides easy access to customer information. They can select result links to get filtered lists of customers that meet the criteria for that section of the dashboard. From that point, they can access detailed customer information.

How are the dashboards organized?

Section/Definitions Column: Includes sections/components of the program (intake, eligibility, and group assignment).

The **i** icon provides a definition for the item in that section. Color-coding is used to identify customers who need action (or are in-process), successfully completed, or did not complete (withdrew). The definitions are listed in the sample below.

Section and Defintions	Count	%	Loss Rate	Pass Rate	Completed Service	%
1. Topic						
<u>White Color Code</u> = FYI only. No action is needed. These numbers are not included in the loss/pass rates. i	<u>2</u>	20%				
<u>Yellow Color Code</u> = Action is needed. These numbers are not included in the loss/pass rates. i	<u>2</u>	20%				
<u>Green Color Code</u> = This step is complete or meets a program requirement. i These customers feed the subsequent dashboard sections.	<u>4</u>	40%				
<u>Red Color Code</u> = This person is either not able to participate or quit participating in the program. i	<u>2</u>	20%	33%			
Total	10					

Customers in the white & yellow lines are not included when calculating the pass/loss rate columns.

Count column: These links provide access to individual customer information.



Dashboard Definitions

CBO Enrollment Verification Status		Updates Since Previous Release
Referral Pending - Appointment has Not Been Scheduled	These customers have been assigned to your organization but they do not have an initial appointment date in the system.	Update - CBO message to let them know they need to schedule an appointment.
Referral Pending - Scheduled Appointment	These customers have been assigned to your organization and their initial appointment date is in the system.	Update - Add Note – Their appointment date is not past due. - Document appointment date and rescheduled dates as a case note.
Referral Pending - Need 2151	These customers need to have an uploaded 2151 form within 48 hours of the initial appointment.	NEW – timeframe is based on current appointment date.
Referral Pending - 2151 Past Due	These customers do not have an uploaded 2151 form and their initial appointment date occurred more than 48 hours ago.	Update - Change title, info bubble, and how it functions. - Need to send a message to CBO as a reminder.
Referral Pending - No Contact From Customer/ Recommend Conciliation	These customers did not show up for their initial appointment date. Their 2151 form was uploaded into the system to indicate “No contact from client”. DHS will follow up with customer to reschedule for the second appointment or proceed with sanction.	New – edit check 2151 during upload for “no contact from client”. System generates case note, message to DHS and customer, and moves them to this section of the dashboard.
Referral Rejected	These customers were assessed by the CBO and determined they were not able to serve them with a training program or employment services. Their 2151 form was uploaded into the system to indicate “Referral Rejected”. Admin staff has been contacted to determine next steps.	New – edit check 2151 during upload for “referral rejected”. System generates case note, message to DHS, Commerce, and super user roles and moves them to this section of the dashboard.
Referral Accepted & Enrollment Started - Enrollment Required	These customers have an uploaded 2151 form, but the CBO has not formally enrolled them into a program. Update the progress page with training program enrollment information.	Update – updated title • Added edit check 2151 during upload for one or more of the following: ○ Client assessment completed ○ Client service initiated
Referral Accepted & Enrollment Verified	These customers have an uploaded 2151 form and the CBO has formally enrolled them into a training program (or employment only services) using the progress page.	Update – updated title • Added edit check 2151 during upload for one or more of the following: ○ Client assessment completed ○ Client service initiated • System generates a case note



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DHS Indicated Customer NOT Currently SNAP Eligible	DHS has indicated this person is no longer eligible to receive SNAP benefits.	Update • Indicated by setting on the progress page for SNAP eligibility
Withdrew From Study	These customers have chosen to withdraw from the study by calling the 800 number. This information comes from EPIS.	Update • Info bubble text
Total	Unduplicated count of EPIC customers who have been assigned to a CBO.	
Recommended Course of Action (Based on most recent 2151A form) – Upload monthly progress between the 1st and 5th of each month		
CBO Needs to Upload - Past Due	These customers do not have an updated 2151A form. These forms should be uploaded between the 1 st and 5 th of each month. They are uploaded using the progress page.	No Change
2151A Forms Up-to-Date	These customers have an updated 2151A form.	No Change
Total	Unduplicated count of EPIC customers who have been enrolled with a CBO.	
2151A Client's Progress: (Based on 2151A Up-to-date uploaded forms)		
Situation Worse	These customers have a 2151A form that was uploaded on or after the first of the month and has Situation Worse selected for the client's activity progress.	Update - Generate a case note
No Progress	These customers have a 2151A form that was uploaded on or after the first of the month and has No Progress selected for the client's activity progress.	Update - Generate a case note
Minimal Progress	These customers have a 2151A form that was uploaded on or after the first of the month and has Minimal Progress selected for the client's activity progress.	Update - Generate a case note
Acceptable Progress	These customers have a 2151A form that was uploaded on or after the first of the month and has Acceptable Progress selected for the client's activity progress.	Update - Generate a case note
Substantial Progress	These customers have a 2151A form that was uploaded on or after the first of the month and has Substantial Progress selected for the client's activity progress.	Update - Generate a case note
Completed	These customers have a 2151A form that was uploaded on or after the first of the month and has Completed selected for the client's activity progress.	Update - Generate a case note
Non-Cooperation	These customers have a 2151A form that was	Update



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	uploaded on or after the first of the month and has Non-Cooperation selected for the client's activity progress.	- System generates case note, message to DHS and customer
Conciliation	These customers have a 2151A form that was uploaded on or after the first of the month and has Conciliation selected for the client's activity progress.	Update - System generates case note, message to DHS and customer
DHS Review - Recommend Sanction	These customers have a 2151A form that was uploaded on or after the first of the month and has Recommend Sanction selected for the client's recommended course of action.	Update - Generate a case note (system already generates message to DHS and customer)
Total	Unduplicated count of EPIC customers who have a 2151A form that was uploaded on or after the first of the month.	
Completion Status		
Hired By Employer - In Follow-Up Period	These customers have exited the program because they were hired by an employer and are in the follow-up period, during this time, a 2151A monthly progress report is required. Employer information has to be filled out.	
Exited Status - Completion Documentation Needs Uploaded	These customers have exited the program but need their completion documentation uploaded.	
Hired by Employer - Uploaded Completed 2151A & Documentation	These customers have exited the program because they were hired by an employer and completed their follow up period	
Enrolled in Training - Uploaded Completed 2151A & Documentation	These customers have exited the program because they enrolled in training.	
Enlisted in Military - Uploaded Completed 2151A & Documentation	These customers have exited the program because they enlisted in the military.	



Dropped Out of Program - Uploaded Completed 2151A	These customers have exited by dropping out of the program.	
No Longer SNAP Eligible - Uploaded Completed 2151A	These customers have exited the program because they were not SNAP eligible.	
Moved Out of State or Region - Uploaded Completed 2151A	These customers have exited the program because they moved out of the state.	
Incarcerated - Uploaded Completed 2151A	These customers have exited the program because they were incarcerated.	
Withdrew From Study - Uploaded Completed 2151A	These customers have exited by withdrawing from the study.	
Total	Unduplicated count of EPIC customers who have exited EPIC.	

System Generated Case Notes and Emails (*Organized by Enrolled Dashboard Line Items*)

Status	System Generated Case Note/Message	Destination for case note/message
Referral Pending - Appointment has Not Been Scheduled	<p>Message – An EPIC customer has been assigned to your organization without an appointment.</p> <p>NEXT STEPS:</p> <ol style="list-style-type: none"> 1. Use the EPIC Enrolled Customer Dashboard to view a list of customers who have a referral pending and need to have their initial appointment scheduled. 2. Contact the customer to schedule an appointment. Refer to the Progress Page instructions for details related to scheduling the initial appointment. 	<ul style="list-style-type: none"> • Message is sent to CBO staff. • Case Note is added to the customer's Progress Page Case Notes.



	<p>Case Note – Assigned to _____ without an appointment by (DHS Caseworker) on (date).</p>	
<p>Referral Pending - Scheduled Appointment</p>	<p>Message - Scheduled Appointment Subject: EPIC Training & Services – Initial Appointment</p> <p>Dear (customer name), (organization name) will work with you to identify steps to reach your goals and your service needs while participating in the EPIC training.</p> <p>Your first initial visit is scheduled for: Day/Time: Organization Name: Organization Phone: Primary Contact: Meeting Details/Notes:</p> <p>Please bring your 2151 Form to the initial meeting. If you are unable to attend the initial meeting, please call and reschedule as soon as possible. Thank you for participating in the study and best wishes!</p> <p>Message - Cancelled Appointment Subject: EPIC Training & Services – Appointment Cancelled</p> <p>Dear (customer name), Your appointment with (organization name) has been cancelled. Day/Time: Organization Name: Organization Phone: Primary Contact: Meeting Details/Notes:</p> <p>Possible reasons for cancelling an appointment include:</p> <ul style="list-style-type: none"> • An error in the original appointment, or • A need to reschedule the appointment. <p>Once the appointment is reset, you will receive a notice with the appointment details.</p>	<ul style="list-style-type: none"> • Message is sent to CBO staff and customer. • Case Note is added to the customer’s Progress Page Case Notes.



	<p>Case Note – Scheduled Appointment Appointment was scheduled with (organization name) (appointment Name/Location) (appointment details/notes)</p> <p>Case Note – Scheduled Appointment Appointment was cancelled with (organization name) (appointment Name/Location) (appointment details/notes)</p>	
Referral Pending – Need 2151	No message/case notes	n/a
Referral Pending - 2151 Past Due	<p>Message – Subject: PAST DUE 2151 EPIC NOTICE One or more customers had a scheduled initial appointment more than 48 hours ago and do not have an uploaded 2151 form.</p> <p>NEXT STEPS:</p> <ol style="list-style-type: none"> 1. Use the EPIC Enrolled Customer Dashboard to view a list of customers who have a 2151 that is past due. 2. Update and upload the 2151 form. Refer to the Progress Page instructions for details related to scheduling the initial appointment. 	<ul style="list-style-type: none"> • Daily message is sent to CBO staff until the customer’s information is up to date.
Referral Pending - No Contact From Customer/ Recommend Conciliation	<p>Message/Case Note – Subject: Recommend Conciliation Our record indicate (customer name) did not attend the initial appointment. Day/Time: Organization Name: Organization Phone: Primary Contact: Meeting Details/Notes:</p> <p>Their 2151 form was uploaded into the system to indicate “No contact from client”.</p>	<ul style="list-style-type: none"> • Message is sent to DHS office staff and customer. • Case Note is added to the customer’s Progress Page Case Notes.
Referral Rejected	<p>Message - Subject: Request EPIC Customer Reassignment A customer was assessed by the (CBO agency) and determined they were not able to serve them with a training program or employment services. Their 2151 form was uploaded into the system to indicate “Referral Rejected”.</p> <p>NEXT STEP: Please meet to determine if it is appropriate to reassign this customer.</p>	<ul style="list-style-type: none"> • Message is sent to DHS admin, Commerce, and super user roles. • Case Note is added to the customer’s Progress Page



	<p>Case Note – (CBO agency) was assessed by the (CBO agency) and determined they were not able to serve them with a training program or employment services. EPIC Admin staff will review to determine next steps.</p>	<p>Case Notes.</p>
<p>Referral Accepted & Enrollment Started - Enrollment Required</p>	<p>Case Note – 2151 form was uploaded with a status of (Client assessment completed/Client service initiated).</p>	<ul style="list-style-type: none"> • Case Note is added to the customer's Progress Page Case Notes.
<p>Referral Accepted & Enrollment Verified</p>	<p>Case Note – Enrolled in (training program name).</p>	<ul style="list-style-type: none"> • Case Note is added to the customer's Progress Page Case Notes.
<p>DHS Indicated Customer NOT Currently Snap Eligible</p>	<p>Message – Subject: Customer Not SNAP Eligible</p> <p>IMPORTANT: DHS has indicated this person is no longer eligible to receive SNAP benefits.</p> <p>NOTE: You have received this message because you have an EPIC partner account associated with the same office as the customer.</p> <p>NEXT STEPS: If training money was obligated prior to ineligibility, the customer can continue in the training program. The CBO will then get credit for that completion. However, NO additional funds can be spent on the customer while ineligible.</p> <p>If they are SNAP eligible in the future and there are still openings in the program, the customer can be enrolled back into a program.</p> <p>It is up to the CBO to determine if the customer should remain enrolled or be exited from the program.</p> <p>Case Note – This customer is not currently SNAP Eligible. If training money was obligated prior to ineligibility, the customer can continue in the training program. The CBO will then get credit for that completion. However, NO additional funds</p>	<ul style="list-style-type: none"> • Message is sent to CBO office staff. • Case Note is added to the customer's Progress Page Case Notes..



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	<p>can be spent on the customer while ineligible.</p> <p>If they are SNAP eligible in the future and there are still openings in the program, the customer can be enrolled back into a program.</p> <p>It is up to the CBO to determine if the customer should remain enrolled or be exited from the program.</p>	
<p>Withdrew From Study</p>	<p>Message Subject: Customer Withdrew From Study</p> <p>IMPORTANT: Our records indicate (customer name) chose to withdraw from the study by calling the 800 number.</p> <p>Next Steps: If training money was obligated prior to being removed from the study, the customer can continue in the training program. The CBO will then get credit for that completion. However, NO additional funds can be spent on the customer and they cannot return to the EPIC program.</p> <p>Case Note- Customer chose to withdraw from the study by calling the 800 number. If training money was obligated prior to being removed from the study, the customer can continue in the training program. The CBO will then get credit for that completion. However, NO additional funds can be spent on the customer and they cannot return to the EPIC program.</p>	<ul style="list-style-type: none"> • Message is sent to DHS office staff, CBO office staff, and customer. • Case Note is added to the customer's Progress Page Case Notes.
<p>2151A form uploaded with Situation Worse</p>	<p>Case Note – 2151A form was uploaded with a status of Situation Worse.</p>	<ul style="list-style-type: none"> • Case Note is added to the customer's Progress Page Case Notes.
<p>2151A form uploaded with No Progress</p>	<p>Case Note – 2151A form was uploaded with a status of No Progress.</p>	<ul style="list-style-type: none"> • Case Note is added to the customer's Progress Page Case Notes.
<p>2151A form uploaded with Minimal Progress</p>	<p>Case Note – 2151A form was uploaded with a status of Minimal Progress.</p>	<ul style="list-style-type: none"> • Case Note is added to the customer's Progress Page Case Notes.



2151A form uploaded with Acceptable Progress	<p>Case Note – 2151A form was uploaded with a status of Acceptable Progress.</p>	<ul style="list-style-type: none"> • Case Note is added to the customer’s Progress Page Case Notes.
2151A form uploaded with Substantial Progress	<p>Case Note – 2151A form was uploaded with a status of Substantial Progress.</p>	<ul style="list-style-type: none"> • Case Note is added to the customer’s Progress Page Case Notes.
2151A form uploaded with Completed	<p>Case Note – 2151A form was uploaded with a status of Completed.</p>	<ul style="list-style-type: none"> • Case Note is added to the customer’s Progress Page Case Notes.
DHS Review - Non-Cooperation - Upload 2151A Form	<p>Message – Subject: 2151A - Non-Cooperation Notice – (customer name)</p> <p>IMPORTANT: A 2151A form has been uploaded for (customer name) with a status marked as Non-Cooperation.</p> <p>NOTE: You have received this message because you have an EPIC partner account associated with the same office as the customer.</p> <p>NEXT STEPS:</p> <ol style="list-style-type: none"> 1. Log into your Illinois workNet account and EPIC Tools using the following link: (Customer Progress Page). 2. Scroll down to the Change in Activity/Monthly Update section and select the file with a progress status of Non-Cooperation. 3. Review the information. Use the case note section to communicate with the appropriate team members for the customer. <p>Case Note – A 2151A form has been uploaded with recommended course of action marked as Non-Cooperation.</p>	<ul style="list-style-type: none"> • Message is sent to DHS office staff. • Case Note is added to the customer’s Progress Page Case Notes.
DHS Review - Recommending Conciliation - Upload 2151A Form	<p>Message – Subject: 2151A - Recommended Conciliation Notice – (customer name)</p> <p>IMPORTANT: A 2151A form has been uploaded for (customer name) with a status marked as Conciliation.</p>	<ul style="list-style-type: none"> • Message is sent to DHS office staff. • Case Note is added to the customer’s Progress Page Case Notes.



	<p>NOTE: You have received this message because you have an EPIC partner account associated with the same office as the customer.</p> <p>NEXT STEPS:</p> <ol style="list-style-type: none"> 1. Log into your Illinois workNet account and EPIC Tools using the following link: (Customer Progress Page). 2. Scroll down to the Change in Activity/Monthly Update section and select the file with a progress status of Conciliation. 3. Review the information. Use the case note section to communicate with the appropriate team members for the customer. <p>Case Note – A 2151A form has been uploaded with recommended course of action marked as Conciliation.</p>	
<p>DHS Review - Recommending Sanction - Upload 2151A Form</p>	<p>Message – Subject: 2151A - Recommended Sanction Notice – (customer name)</p> <p>IMPORTANT: A 2151A form has been uploaded for (customer name) with recommended course of action marked as Recommended Sanction.</p> <p>NOTE: You have received this message because you have an EPIC partner account associated with the same office as the customer.</p> <p>NEXT STEPS:</p> <ol style="list-style-type: none"> 1. Log into your Illinois workNet account and EPIC Tools using the following link: (Customer Progress Page). 2. Scroll down to the Change in Activity/Monthly Update section and select the file with a progress status of Recommended Sanction. 3. Review the information. Use the case note section to communicate with the appropriate team members for the custom. <p>Case Note – A 2151A form has been uploaded with recommended course of action marked as Recommended Sanctions.</p>	<ul style="list-style-type: none"> • Message is sent to DHS office staff. • Case Note is added to the customer’s Progress Page Case Notes.
<p>Exit Status – Successful Completion Hired By Employer</p>	<p>Case Note – This customer's exit status has been updated with the following status: Hired by Employer.</p>	<ul style="list-style-type: none"> • Case Note is added to the customer’s Progress Page Case Notes.



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Exit Status – Successful Completion Enrolled in Training	Case Note – This customer's exit status has been updated with the following status: Enrolled in Training.	<ul style="list-style-type: none"> • Case Note is added to the customer's Progress Page Case Notes.
Exit Status – Successful Completion Enlisted in Military	Case Note – This customer's exit status has been updated with the following status: Enlisted in Military.	<ul style="list-style-type: none"> • Case Note is added to the customer's Progress Page Case Notes.
Exit Status - Unsuccessful Completion Dropped Out of Program	Case Note – This customer's exit status has been updated with the following status: Dropped Out of Program.	<ul style="list-style-type: none"> • Case Note is added to the customer's Progress Page Case Notes.
Exit Status - Unsuccessful Completion No Longer SNAP Eligible	Case Note – This customer's exit status has been updated with the following status: Not SNAP Eligible.	<ul style="list-style-type: none"> • Case Note is added to the customer's Progress Page Case Notes.
Exit Status - Unsuccessful Completion Moved Out of State or Region	Case Note – This customer's exit status has been updated with the following status: Moved Out of State or Region.	<ul style="list-style-type: none"> • Case Note is added to the customer's Progress Page Case Notes.
Exit Status - Unsuccessful Completion Incarcerated	Case Note – This customer's exit status has been updated with the following status: Incarcerated.	<ul style="list-style-type: none"> • Case Note is added to the customer's Progress Page Case Notes.
Exit Status - Unsuccessful Completion Withdrew From Study	Case Note – This customer's exit status has been updated with the following status: Withdrew From Study.	<ul style="list-style-type: none"> • Case Note is added to the customer's Progress Page Case Notes.



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