

How to Update EPIC Customer Completion Status

- 1. Go to the customer's EPIC Progress Page.
- 2. Select the Completion Information drop down.
- 3. Select a Completion Status.
 - In Progress
 - Completed
 - Did Not Complete
- 4. If the customer's Completion Status is Completed or Did Not Complete, select the Completion Reason:
 - a. Successful Completion

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In Progress		Select	*		
In Progress					
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- If the Completion Reason is Enlisted in Military or Enrolled in Training:
 - 1. Enter the date they enlisted/enrolled in advanced training in the Completion Date and click Update.
 - 2. Use the Upload Completion Documentation button to upload the required documentation (see table below for examples).
 - 3. Upload the 2151A form (in the monthly progress section) indicating the customer has completed the program.

Upload a 2151A and related required documentation to close

Completion Information

Completion Status *

Employer Name

Successful Completion

- If the Completion Reason is Hired by an Employer:
 - Enter the date they began the job in the Completion Date and Click Update.

added, the business name will appear in the Employer Name column below.

- Industry selection indicates if the customer was hired in an industry related to the training pathway in which a credential was earned. If it does not match, the comments box at the bottom of the employment input area will become a mandatory field.
- b. Hire source indicates how the customer found the position:
 - i. *Customer found employment on their own.* Customer found and gained employment, i.e. Customer came into the CBO and either already had a job or had an interview before working with the CBO.
 - ii. Customer found employment on their own and obtained the position with CBO assistance. Customer's job placement was self-secured utilizing the training and tools

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Employor Nome *	Disney World					
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Completion Information Status on Progress Page

October 2017 v10

provided by the CBO. i.e. resume assistance, clothes closet, interviewing skills, etc.

- iii. *CBO facilitated employment for customer.* Customer received a job through direct placement by the CBO through employer relationships or a job developer finding positions for which the customers interviewed and were placed.
- 3. Obtain an employment verification form signed by the customer upon enrollment in program. The ways to obtain verification include:
 - a. Use an internal verification form.
 - b. Use DHS form 3085 available on the EPIC Restricted Resources page.
 - c. Customer submits pay stubs.
 - d. Use www.theworknumber.com.

If employment verification cannot be obtained from the customer, CBOs will need to add a case note to the customer progress page documenting their outreach attempts to the customer in obtaining this information and asking for DHS assistance in obtaining employment verification. The case note should be sent as an Illinois workNet message and email to the DHS primary contacts.

- 4. 90-day follow-up is required. During this time, a 2151A monthly progress report is required. Upload the form in the monthly progress section.
 - A. Mark Job Retention and how many days of employment. On all subsequent uploads. This is the only field that retains the date of the initial activity (hire date). This form and marking the customer "Completed" in

Community Service-TANF				Self-Employment		· .	
X Job Retention	541	10-17-17	15 days	Child Under 1	78	1	
	215			Substance Abuse	78	3	
Job Readiness - SNAP Ea I	150			Substance Abuse			_
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Community Work - SNAP E&T	531			Other	78	9	
Check the client's progress on the ac	tivity:	Situation worse	No progress	Recommended course of	action for the c	lient: Prog	gram completed
Minimal progress X Accept	stable pro	gress 📃 Subst	tanial progress	X No change/continue	SP 🗌 Amer	nd SP (copy attac	hed)
Non-cooperation Cond	liation	Completed		Joint staffing needed	Addition	al referrals	Recommend sanction
Client went to work Check any change in supportive service needs							
			Type of S	upportive Service	Funds Provided	Made Referrals	Request Payment - DH
Employer Name: Disneyworld							,
Contact: Human Resources	P	hone: 888-555-	-5555 🚺 Chile	i Care			
Address: 1Disney Way			Job	Search allowance			
city: Orlando, FL		Zip: 12345	Med	ical Exams			
Job Title: Princess			Den	tai 📃 Optical TANF			
Start Date Oct 17, 2017	First P	ay: 10/28/17	Wor	k activity allowance TANF			
Wages/hr: 25.00	Hours	wk: 40	Tran	sportation			
Health Insurance: mm							

the completion information section moves the customer to the "In Follow-up" section of the Enrolled dashboard.

- B. Mark Acceptable Progress in Activity for any report that does not include the 90-day mark. i.e. 37 days or 60 days
- C. Mark No Change/Continue SP in Action for any report that does not include the 90-day mark. i.e.
 45 days or 72 days
- D. Include (at minimum) the name of the employer in Client Went to Work Section. Preferably, include all employer information on all status updates after employment is attained.
- 5. At the 90-day follow-up status update, upload the 2151A form (in the monthly progress section) indicating the customer has completed the program by marking Job Retention with 90 days.
 - A. Mark Completed in Activity.
 - B. Mark Program Completed in Action.
 - C. Include all the Employer information in the Client Went to Work section which will move the client out of the white "In Follow-Up Period" (holding) section on the dashboard into the green line Hired by Employer.
- b. Unsuccessful Completion













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October 2017 v10

- If the Completion Reason is Incarcerated, Not SNAP Eligible, Moved Out of State or Region, Dropped Out of the Program, or Withdrew From Study.
 - 1. Enter the date closest to the date known in the Completion Date and Click Update.
 - 2. Upload the 2151A form (in the monthly progress section) indicating the customer has completed the program.
- 5. Select the Completion Date and click Update.
- 6. After you click Update, red text will appear in the Completion Information box to let you know what documentation is required for the customer.

Completion Status Types and Required Documentation

An EPIC customer should be exited from the EPIC Program when:

Scenario	Type of Exit	2151A Requirements	Examples of required Documentation
Hired by Employer	Successful Completion	90-day follow-up is required. During this time, a 2151A monthly progress report is required.	Fill out Employer Information.
Enrolled in Training	Successful Completion	Upload the 2151A form indicating the customer has completed the program.	Proof of Enrollment – Class Schedule or acceptance letter.
Enlisted in Military	Successful Completion	Upload the 2151A form indicating the customer has completed the program.	Proof of Enlistment – Military ID Card
Not SNAP Eligible	Unsuccessful Completion	Upload the 2151A form indicating the customer has completed the program.	N/A
Incarcerated	Unsuccessful Completion	Upload the 2151A form indicating the customer has completed the program.	N/A
Moved Out of State or Region	Unsuccessful Completion	Upload the 2151A form indicating the customer has completed the program.	N/A
Dropped Out of Program	Unsuccessful Completion	Upload the 2151A form indicating the customer has completed the program.	N/A
Withdrew from Study	Unsuccessful Completion	Upload the 2151A form indicating the customer has completed the program.	N/A

FAQ related to Exiting a customer

Q: If a customer is not SNAP eligible, do I need to mark them as complete from the program right away?

A: It depends on the situation. If a customer is not currently SNAP Eligible and training money was obligated prior to ineligibility, the customer can continue in the training program. The CBO will then get credit for that completion.

















Completion Information Status on Progress Page

However, NO additional funds can be spent on the customer while ineligible. It is up to the CBO to determine if the customer should remain enrolled or be exited from the program.

- If it seems like the customer will be ineligible for a limited amount of time, you may want to keep them enrolled. As soon as they are SNAP eligible again, they can continue with training and services.
- If it seems like the customer may be sanctioned for an extended period of time, you may want to mark them as complete, and then exit him or her from the EPIC program. If there are still openings in the program, the customer can be enrolled back into a program.

Q: If a customer gets a job halfway through the training program, would it still be considered a successful completion?

A: If a client is placed in a job during the training program, it would be considered a positive placement for employment. The intent would be to try and work with them to complete the training and obtain certifications/credentials and to move up in a career pathway. We will have to determine on a case by case basis if the "completion of training" benchmark is considered a successful outcome. You can contact <u>epic@illinoisworknet.com</u> with cases like this.















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