How to Export a List from your EPIC Dashboard
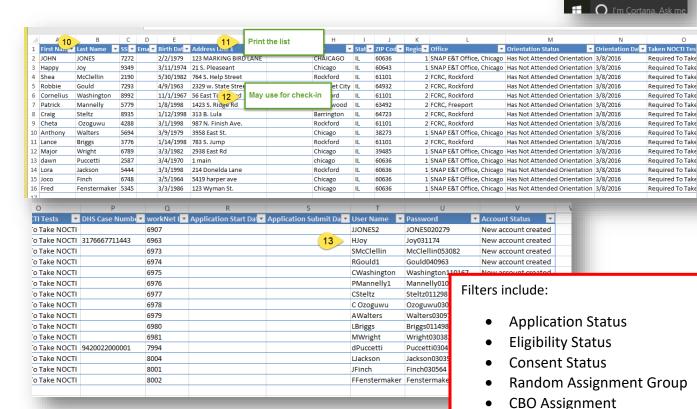
1. Log in to your EPIC Dashboard.
2. Click Customers from top menu. (*Default*)
3. Click Intake tab. (*Default*)
4. Select your Region/Office (if you have access to more than one office).
5. Enter the filter parameter you wish to search.
6. Click Search.
7. Wait for the list to filter.
8. Click Export.
9. File will download to your computer.
10. Open Excel spreadsheet.
11. Print.
12. It may be used for check-in at Orientation.
13. The report provides user name and password, follow-up date, participant identifying numbers, and assignments depending upon the report you export.

Print the list

May use for check-in

	First Name	Last Name	SS#	Email	Birth Date	Address Line 1		State	ZIP Code	Region	Office	Orientation Status	Orientation Date	Taken NOCTI Test
2	JOHN	JONES	7272		2/2/1979	123 MARKING BIRD LANE	CHAICAGO	IL	60636	1	SNAP E&T Office, Chicago	Has Not Attended Orientation	3/8/2016	Required To Take
3	Happy	Joy	9349		3/11/1974	21 S. Pleaseant	Chicago	IL	60643	1	SNAP E&T Office, Chicago	Has Not Attended Orientation	3/8/2016	Required To Take
4	Shea	McClellin	2190		5/30/1982	764 S. Help Street	Rockford	IL	61101	2	FCRC, Rockford	Has Not Attended Orientation	3/8/2016	Required To Take
5	Robbie	Gould	7293		4/9/1963	2329 w. State Street	et City	IL	64932	2	FCRC, Rockford	Has Not Attended Orientation	3/8/2016	Required To Take
6	Cornelius	Washington	8992		11/1/1967	56 East Ti...d	ord	IL	61101	2	FCRC, Rockford	Has Not Attended Orientation	3/8/2016	Required To Take
7	Patrick	Mannelly	5779		1/8/1998	1423 S. Ridge Rd	wood	IL	63492	2	FCRC, Freeport	Has Not Attended Orientation	3/8/2016	Required To Take
8	Craig	Steltz	8935		1/12/1998	313 B. Lula	Barrington	IL	64723	2	FCRC, Rockford	Has Not Attended Orientation	3/8/2016	Required To Take
9	Cheta	Ozoguwu	4288		3/1/1998	987 N. Finish Ave.	Rockford	IL	61101	2	FCRC, Rockford	Has Not Attended Orientation	3/8/2016	Required To Take
10	Anthony	Walters	5694		3/9/1979	3958 East St.	Chicago	IL	38273	1	SNAP E&T Office, Chicago	Has Not Attended Orientation	3/8/2016	Required To Take
11	Lance	Briggs	3776		1/14/1998	783 S. Jump	Rockford	IL	61101	2	FCRC, Rockford	Has Not Attended Orientation	3/8/2016	Required To Take
12	Major	Wright	6789		3/3/1982	2938 East Rd	Chicago	IL	39485	1	SNAP E&T Office, Chicago	Has Not Attended Orientation	3/8/2016	Required To Take
13	dawn	Puccetti	2587		3/4/1970	1 main	chicago	IL	60636	1	SNAP E&T Office, Chicago	Has Not Attended Orientation	3/8/2016	Required To Take
14	Lora	Jackson	5444		3/3/1998	214 Donelda Lane	Rockford	IL	60636	1	SNAP E&T Office, Chicago	Has Not Attended Orientation	3/8/2016	Required To Take
15	Joco	Finch	6748		3/5/1964	5419 harper ave	Chicago	IL	60636	1	SNAP E&T Office, Chicago	Has Not Attended Orientation	3/8/2016	Required To Take
16	Fred	Fenstermaker	5345		3/3/1986	123 Wyman St.	Chicago	IL	60636	1	SNAP E&T Office, Chicago	Has Not Attended Orientation	3/8/2016	Required To Take

NOCTI Tests	DHS Case Number	workNet ID	Application Start Date	Application Submit Date	User Name	Password	Account Status
o Take NOCTI		6907			JJONES2	JONES020279	New account created
o Take NOCTI	3176667711443	6963			HJoy	Joy031174	New account created
o Take NOCTI		6973			SMcClellin	McClellin053082	New account created
o Take NOCTI		6974			RGould1	Gould040963	New account created
o Take NOCTI		6975			CWashington	Washington110167	New account created
o Take NOCTI		6976			PMannelly1	Mannelly010...	
o Take NOCTI		6977			CSteltz	Steltz011298	
o Take NOCTI		6978			C Ozoguwu	Ozoguwu030...	
o Take NOCTI		6979			AWalters	Walters03091	
o Take NOCTI		6980			LBriggs	Briggs011498	
o Take NOCTI		6981			MWright	Wright03038...	
o Take NOCTI	9420022000001	7994			dPuccetti	Puccetti0304	
o Take NOCTI		8004			LJackson	Jackson03039	
o Take NOCTI		8001			JFinch	Finch030564	
o Take NOCTI		8002			FFenstermaker	Fenstermake...	

Filters include:

- Application Status
- Eligibility Status
- Consent Status
- Random Assignment Group
- CBO Assignment
- Language Spoken