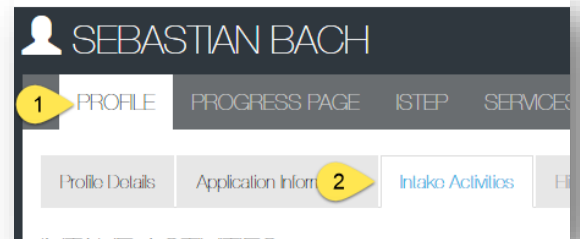


EPIC Customer Intake Activities Tab

- Access the customer profile in EPIC.
 - Log in to your EPIC dashboard for partners (only) <http://www.illinoisworknet.com/EpicDashboard>.*
 - Go to the **Customers** tab in the dashboard menu at top of screen.
 - Use the **search criteria** to narrow results.
 - Select **Search** to find the name in the search results.
 - From the results, **find the correct person**.
 - Select **Profile**.
- Select the Intake Activities Tab.
- In Section 1.1 Orientation Date, **select** one of the following options:



A. Customer HAS NOT Attended Orientation

- Customer can be re-invited to orientation – *for mandatory customers who fall under “good faith” reasons.* Reports to Missed Orientation.
- Customer is no longer SNAP eligible. (Text will turn red if selected.) Reports to No Longer SNAP Eligible.
- Conciliation/Sanction process has started – *for mandatory customers who do not have a “good faith” reason for not attending. Begin the Conciliation process.* Reports to Conciliation/Sanction Process has Started.
- Voluntary Area, cannot reach customer. Reports to Declined EPIC Services.
- Customer moved out of EPIC service area. Reports to Declined EPIC Services.
- Customer reported employment and does not want to participate. Reports to Declined EPIC Services.

B. Attended Orientation – Application submitted will automatically show once an application is submitted by the customer.

C. Attended Orientation Does Not Want to Participate

- I am interested in the training program, but I can't participate in training now. I would like to participate in the training program at a later date. *You will be prompted to schedule a follow-up date.* Reports to Scheduled for Follow-Up to Complete Orientation.
- I am interested in the training program and can participate now, but I need to reschedule another date/time to complete the application process. *You will be*



prompted to schedule a follow-up date. Reports to Scheduled for Follow-Up to Complete Orientation.

- Customer started the orientation process but needed to leave. *You will be prompted to schedule a follow-up date.* Reports to Scheduled for Follow-Up to Complete Orientation.
- I am not interested in the particular types of training offered. Reports to Declined EPIC Services At This Time.
- I am not interested in any kind of training. Reports to Declined EPIC Services At This Time.
- Customer is Exempt in mandatory area and elected not to participate. Reports to Declined EPIC Services At This Time.
- Customer is in a Voluntary area and elected not to participate and/or cannot be reached for follow-up. Reports to Declined EPIC Services At This Time.
- Customer selected traditional SNAP E&T engagement. Reports to Declined EPIC Services At This Time.
- Customer is a TANF recipient. Reports to Declined EPIC Services At This Time.
- Customer refused to participate in EPIC or regular SNAP. Reports to Conciliation/Sanction Process has Started.
- Customer reported income – exempt and can volunteer. *May require follow-up date.* Reports to Declined EPIC Services At This Time.
- Customer reported income – no longer eligible. *May require follow-up date.* Reports to Declined EPIC Services At This Time.
- Customer is no longer SNAP Eligible. (Text will turn red if selected.) Reports to No Longer SNAP Eligible.
- Customer moved out of EPIC service area. Reports to Declined EPIC Services At This Time.

4. Section 1.2 Schedule for Follow-up

- A selection from Section 1.1 may prompt an automatic scheduling of a follow-up appointment. Complete that process. Provide a 1721C referral form to the customer with the follow-up date.
- Schedule a customer for a follow-up appointment if they have indicated a possible exemption.
- Schedule a customer for a follow-up appointment to complete the orientation process if not prompted by one of the selections.

