

Contents

General Information	1
Purpose:	1
Who Enters/Maintains Data:	1
Getting Started:.....	2
How to Get to the Invite Tool:	3
CBO Reverse Referral to IDHS.....	3
Reverse Referral Process Flow	3
Reverse Referral Instructions.....	5
IDHS Referral to EPIC CBO Provider	7
IDHS Referral Process Flow	7
IDHS Referral Instructions.....	8
Rejected Referral	9
Customer Application Completion.....	9
New Cohort Rows in Enrolled Dashboard.....	10

General Information

Purpose:

The EPIC online system intake process uses the invite tool to enter new EPIC cohort customers into the system. Customers are entered by either Illinois Department of Human Services (IDHS) or EPIC grantee Community Based Organizations (CBO). The invite tool:

- Provides EPIC CBOs a way to send reverse referrals to IDHS.
- Provides a way for IDHS case managers to refer customers to EPIC CBOs.
- Creates a new Illinois workNet customer account or sync to an existing customer account.
- Checks to see if the customer is already a current EPIC participant and eligible to participate in the program.
- Allows IDHS to communicate SNAP eligibility status to CBOs.
- Assigns customers to a CBO and schedules them for their initial orientation.
- Populates the 2151 for referral to the EPIC CBO.
- Provides access to the EPIC online application (Initial Assessment) which is completed at the CBO.

Who Enters/Maintains Data:

- **CBO agency staff** enters the customer’s information to request an eligibility review and approval by IDHS local office staff, then schedules the customer for an initial orientation at the CBO.

- **IDHS local office staff** enters the customer’s information to refer the customer to a CBO agency.
- **IDHS local office staff** reviews customers, who are reverse referred by CBO agencies, eligibility.

Getting Started:

CBOs need to have their initial appointment entered into the EPIC system. See Add Appointment to Scheduling Calendar ([PDF](#)) for detailed instructions.

It is important to provide a meaningful title so IDHS staff can easily identify the appropriate meeting slots. Adjust the following examples scenarios in a way that works with your daily activities/workflow.

Scenario	Title	Description
Provide group orientations for both new cohort customers and re-engagement customers together.	EPIC Group Orientation	This is a group orientation for both new and re-engagement customers. First, staff will provide an overview of the (<i>CBO</i>) program requirements. Staff will then work with customers to complete the enrollment process. <ul style="list-style-type: none"> • New customers will complete the online application and then work with staff to complete the enrollment process. • Existing EPIC customers will work with staff to complete the re-engagement/re-enrollment process.
Provide group sessions for new cohort and re-engagement separately.	New Cohort Group Orientation Session	This is a group orientation; new customers will receive an overview of the (<i>CBO</i>) program requirements and complete the online application. Staff will review the application and complete the enrollment process. Include the word New Cohort in the orientation name.
	EPIC Re-engagement Customer Group Orientation Session	This is a group orientation where re-engaged customers will receive an overview of the (<i>CBO</i>) program requirements. Staff will complete the re-engagement/re-enrollment process.
Provide one-on-one sessions for new cohort and re-engagement.	EPIC Individual Orientation Session	This one-on-one orientation is for either new or re-engaged customers. Staff will first cover an overview of the (<i>CBO</i>) program requirements. Then, staff will work with customers to complete the enrollment process. <ul style="list-style-type: none"> • After new customers complete the online application, they will work with staff to complete the enrollment process. • Existing EPIC customers will work with staff to complete the re-engagement/re-enrollment process.

How to Get to the Invite Tool:

1. Log into www.illinoisworknet.com.
2. Select **My Dashboard**.
3. Select **Partner Tools**.
4. Select **EPIC Partner Tools**.
5. Select **Customer** and select **Invite**.

Shortcut Tip:

Go to www.illinoisworknet.com/EPICpartners.
Select the link for **EPIC Partner Dashboard**.

CBO Reverse Referral to IDHS

Reverse Referral Process Flow

Steps & Notes	Completed By	System Used	IDHS Forms & Policy
<p>CBOs use their outreach plan to recruit potential participants from a known pool of existing SNAP recipients. While the focus of the program is the ABAWD customer, volunteer participants are encouraged to participate as well.</p> <ul style="list-style-type: none"> • Provide an EPIC program overview individually or as a group. • Ask these three questions to get a general idea if the person is an eligible SNAP recipient: <ul style="list-style-type: none"> ○ Are you receiving SNAP benefits? Must currently be receiving SNAP benefits. ○ Are you receiving TANF? TANF participants are not able to participate. ○ Provide 4538 – Discuss and provide a copy to the customer. • In addition to this process, CBOs are encouraged to contact the local office E&T Primary Contacts to setup a time to present their programs to the customers at their local office. 	EPIC CBO	In-person	4538
<p>Request IDHS verify eligibility of a customer who self-identified as an eligible SNAP recipient not receiving TANF.</p> <ul style="list-style-type: none"> • Must include first name, last name, social security number (SSN), date of birth (DOB), address, phone number, and IDHS office. • System checks to see if they are already in a control/treatment group. If they are in EPIC, refer them to IDHS. 	EPIC CBO	EPIC Tools -Invite Tool- Add SNAP customer	2151

Steps & Notes	Completed By	System Used	IDHS Forms & Policy
<ul style="list-style-type: none"> • System checks to see if they already have an Illinois workNet account. If not, it will create an account for the customer. • CBO schedules the person for an initial assessment orientation with their organization at least 12 business days out. <ul style="list-style-type: none"> ○ CBO encourages the customer to visit the local office to complete the eligibility process and complete the Family Assessment. The Initial Assessment must be completed by the case worker. 			
<p>IDHS receives the reverse referral eligibility verification request.</p> <ul style="list-style-type: none"> • Request is sent to the local office Primary Contacts. 	System generated when request is made.	<p>EPIC Tools</p> <ul style="list-style-type: none"> • Populates new line item on the Enrolled Dashboard. 	
<p>IDHS verifies eligibility:</p> <ul style="list-style-type: none"> • Accepts the eligibility request within two business days. • Contacts the customer within the 10-day policy. • Calls the customer and sends a 267 (Appointment Notice). • Verifies eligibility and completes the Family Assessment (4001 form). <ul style="list-style-type: none"> ○ If eligible, they enter the name, SSN, DOB, and mandatory/voluntary status. Once entered, they will submit eligibility and print 2151 form for their records. This creates Case Notes and sends a message to the customer and CBO with a link to complete their EPIC online application. ○ If not eligible, they submit eligibility response. This creates Case Notes and sends a message to the customer and CBO. Customer cannot complete the online application. 	IDHS	<p>EPIC Tools</p> <ul style="list-style-type: none"> • Access from the Enrolled Dashboard or notification summary. • Directs IDHS to the invite customer list to complete the eligibility verification. 	<p>2151</p> <p>PM 21-06-04</p>
<p>Customer goes to the CBO Initial Assessment Orientation:</p> <ul style="list-style-type: none"> • Completes the EPIC online application. • CBO completes the existing enrollment process. 	EPIC CBO	<p>EPIC Tools</p> <ul style="list-style-type: none"> • Online application • Progress Page Tools 	Existing EPIC Enrollment Process

Reverse Referral Instructions

- If a customer was invited to the original cohort but was never assigned, they can participate in the new cohort.
- During the invitation process, if the customer has an Illinois workNet identification number, an alert message will pop-up to verify if this is the same customer.
- If a customer was randomly assigned during the original cohort, an error message will appear indicating this customer cannot be invited.
- Customers, who have already been invited, appear in the list under the Customer's Invite tab. Click View to see the information entered and print the 2151 referral form.
- To view the customer's profile information from the Customers tab, click on Profile located in the Customer Information column.

1. Add new customer.

- Select **Add SNAP Customer**.
- Enter the information required to confirm eligibility. *All fields on the form are required.*
 - Phone – It is important that the customer provides a current number that can be used to quickly answer questions that may arise during IDHS review for eligibility verification.
 - IDHS Office – Select the office the customer typically visits from the dropdown list.
 - Customer Eligibility Request Status – **Request SNAP eligibility**.
- Save customer information:
 - Click **Save Customer** to save the customer's information without submitting to IDHS for verification.
 - Click **Save and Invite Customer to Orientation** to save the customer's information and complete the invitation process.
 - In the window that opens, review the customer's information and select an **appointment** by clicking the **Invite** button.
- Click **Submit Eligibility Verification** button.
- *In addition to the dashboard, you will be able to tell the status of a customer on the Customers > Invite tab > far right column "Eligibility". For customers whose eligibility has been determined, click **View** to see the reason that a customer is not eligible.*

2. IDHS will verify eligibility.

- Select **Enrolled Dashboard**.
- Review the top section entitled **Customer Eligibility Verification**.
- Click on the **number next to a Red or Yellow row** to complete the verification process.
 - Yellow rows indicate action is required by IDHS.
 - Red rows indicate action is past due by IDHS.
 - Green rows indicate customers submitted by the CBO have been verified by IDHS to participate, and whether they are Voluntary (Exempt) or Mandatory (Non-Exempt).
 - White rows indicate the number of Mandatory or Voluntary customers.
 - The bottom red row indicates those customers who are not eligible or have not been able to be verified.

- In the window that opens, select “**View**” next to the customer whose eligibility needs to be verified.
 - Confirm the **Social Security Number**. This is the only identification number that will be used for the client. If an SSN cannot be verified, mark the customer as *Not Able to Verify Eligibility* and Save.
 - IDHS will re-invite customer using the correct SSN to the nearest intake orientation date if the customer is present. Otherwise, select a date that falls within IDHS notification parameters.
 - IDHS will indicate that *SSN cannot be verified, and CBO needs to re-invited* in remark when marking “Not able to Verify Eligibility”.
 - If the incorrect SSN is found to belong to another customer, contact the EPIC Admin team from IDHS or Illinois workNet.
 - If IDHS cannot determine the identity of the customer, the CBO will need to recall the customer and obtain the correct SSN to re-invite.
 - Mark if the customer is **Mandatory** or **Voluntary**.
 - Mark the **Eligibility** of the customer.
 - Certain eligibility statuses require a reason. For example, “Not able to Verify Eligibility”, would require a remark like – SSN cannot be verified.
 - Ensure the Family Assessment 4001 is complete.
 - Save customer information:
 - **Save** simply saves the information that was updated.
 - **Save and Invite Customer to Orientation** –Completes the Verification and allows the customer to continue at the CBO.
 - If IDHS exceeds the allotted 12 business days to approve the invitation, a new appointment must be selected. *If a variety of appointment options are available, select an appointment with “New Cohort” in the name.*
 - Click **Print 2151 Referral Form** and give a copy to the customer if customer is present and mail copy of 2151 to customers who are not present. Save 2151 as a PDF to the IDHS file system.

Upon verification, the CBO will be able to engage the customer. If the customer is verified earlier than the scheduled appointment, the CBO can contact the customer to return sooner than the original appointment date. Proper documentation will be provided by the CBO on the customer progress page.

IDHS Referral to EPIC CBO Provider

IDHS Referral Process Flow

Step & Notes	Completed By	System Used	IDHS Forms & Policy
<p>Recruit potential participants from a known pool of SNAP recipients not receiving TANF. While the focus of the program is the ABAWD customer, volunteer participants are encouraged to participate as well.</p> <ul style="list-style-type: none"> • Provide an EPIC program overview individually. 	IDHS	In-person	Existing IDHS Process
<p>Refer eligible customer to the CBO.</p> <ul style="list-style-type: none"> • Review CBO training programs. If not interested, close invite. • If interested: <ul style="list-style-type: none"> ○ Enter first name, last name, SSN, DOB, address, phone, mandatory/voluntary status, and CBO. ○ System checks to see if they are already in a control/treatment group. If in EPIC, follow current IDHS EPIC re-engagement process. ○ System checks to see if they already have an Illinois workNet account. If not, it will create an account for the customer. ○ Schedule the person for the Initial Assessment orientation with the CBO organization. ○ Print 2151 form for the customer to have in hand. Notification is sent to CBO and customer. 	IDHS	<p>EPIC Tools</p> <p>- Invite Tool –</p> <p>Add SNAP customer</p>	Existing IDHS EPIC Process
<p>Customer goes to the CBO Initial Assessment Orientation:</p> <ul style="list-style-type: none"> • Customer completes the EPIC online application. • CBO completes the existing enrollment process. 	EPIC CBO	<p>EPIC Tools</p> <ul style="list-style-type: none"> • Online application • Progress Page Tools 	Existing EPIC Enrollment Process

IDHS Referral Instructions

Inviting existing unassigned customers.

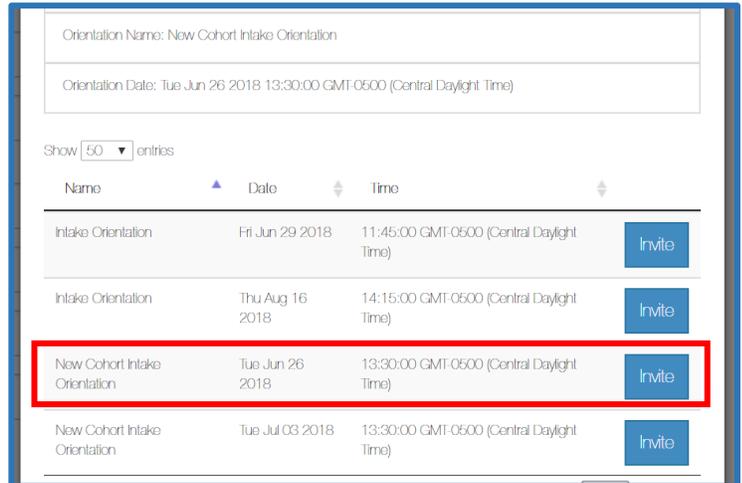
- If a customer was invited to the original cohort but was never assigned, they can participate in the new cohort.
- During the invitation process, if the customer has an Illinois workNet identification number, an alert message will pop-up to verify if this is the same customer.
- Complete the invitation process.
- If a customer was already randomly assigned, an error message will pop-up indicating that this customer cannot be invited.
- Customers, who have already been invited, appear in the list under the Customer's Invite tab. Click View to see the information entered and print the 2151 referral form.
- To view the customer's profile information from the Customers tab, click on Profile located in the Customer Information column.

For customers who were not previously entered:

1. Add new customer.

- Select **Add SNAP Customer**.
- Enter the information required to confirm eligibility. *All fields on the form are required.*
 - Ensure the Family Assessment 4001 is complete.
 - Mark whether the customer is Mandatory or Voluntary.
 - Select a CBO to refer the customer to.
 - Select a CBO contact from the drop-down.
 - Select an Eligibility Status from the drop-down.
 - IDHS should only invite customers who are able to be referred to a CBO.
- Save customer information.
 - Click **Save Customer** to save the customer's information without submitting verification status.
 - Click **Save and Invite Customer to Orientation** to save the customer's information and complete the invitation process.

- In the window that opens, review the customer’s information and select an **appointment** by clicking the **Invite** button.
- Click the **Invite Customer to CBO Orientation** button.
- Schedule customer for an initial CBO appointment and provide referral form.
 - Verify information entered is correct.
 - Select an **appointment date**. *If a variety of appointment options are available, select an appointment with “New Cohort” in the name.*
 - Click the **Invite** button. Verify the time is correctly filled in, the Orientation name, and date at the top of the window.
 - Click **Submit Verification and Send Invite**.
 - Print the 2151 Referral Form by clicking the **Print 2151 Referral Form**.
 - Provide a copy of the 2151 form to the customer.



2. Eligible customer goes to the CBO initial orientation and completes the EPIC application.
3. CBO staff use the existing process for officially enrolling the customers into their program.

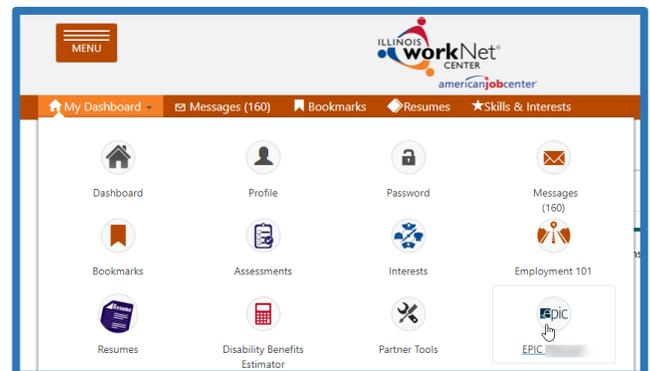
Rejected Referral

If a CBO rejects a referral from an IDHS invitation, the CBO will be asked to write a Case Note about the rejection reason.

IDHS will need to go to the customer Progress Page and **update** the Customer eligibility to “SNAP eligible and no longer EPIC eligible due to moving to traditional SNAP Program” unless the customer can be referred to another CBO.

Customer Application Completion

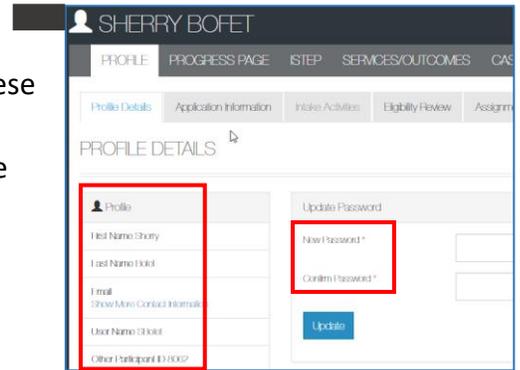
The customer will complete the application at the CBO. The application is available on the customer’s Illinois workNet Dashboard.



<https://www.illinoisworknet.com>

Customer logs in with their username and password. You can find these items in the export list for customers from the Enrolled Dashboard in the “Application Not Started” list. Typically, the initial password is the customer’s last name and 6-digit date of birth.

The password can be reset in the customer’s EPIC Profile under the Profile Details tab. Directions for customers to reset their own password can be found on any EPIC page in the Profile details box by clicking the blue “Reset Password” button.



New Cohort Rows in Enrolled Dashboard

The new cohort intake information was added to the top of the existing Enrolled Dashboard.

- Only new cohort customers are in the top rows.
- The CBO Enrollment Verification Status (and below) have BOTH new cohort customers and original EPIC customers.

Just like other Dashboards, new cohort customers will show in multiple rows on the Dashboard. The Dashboard provides a count of customers who meet certain criteria. The number of customers provides access to a filtered list of customers that meet the criteria for that line item.

For example: After IDHS verifies eligibility, customers could fall in the following lines:

- **Verified Eligible with Appointment**, either Not Exempt or Exempt.
- Mandatory or Voluntary.
- Application not started – Once a customer completes the application, they will move to either Application Complete or the Decline EPIC Services.
- Referral Pending - Scheduled Appointment – Use this row to determine the number of customers who are attending an orientation who are either being re-engaged or are part of the new cohort.

Color Coded Rows:

- Yellow rows indicate action is required by IDHS.
- Red rows indicate action is past due by IDHS.
- Green rows indicate customers submitted by the CBO have been verified by IDHS that can participate, and whether they are Voluntary (Exempt) or Mandatory (Non-Exempt).
- White rows indicate the number of Mandatory or Voluntary customers.
- The bottom red row indicates customers who are not eligible or have not been able to be verified.

See Dashboard Below:

	Count	%	Loss Rate	Success Rate
Customer Eligibility Verification (Note: This section only applies to the new cohort)				
IDHS – Accept Eligibility Verification Request within 2-days of CBO Verification Request				
IDHS – Eligibility Verification Request Not Accepted within 2-days				
IDHS – Verify Eligibility within 12-days of CBO Verification Request				
IDHS – Eligibility not verified within 12-days				
Verified Eligible – Not Exempt				
Verified Eligible – Exempt				
Mandatory				
Voluntary				
Verified Not Eligible OR Not Able to Verify Eligibility				
Total				
New Cohort Application status (Note: This is only verified eligible new cohort customers)				
Application not started				
Application complete				
Application complete: Decline EPIC Services				
Total				
CBO Enrollment Verification Status (Note: This section includes both original EPIC and <u>verified eligible new cohort customers</u>)				
Referral Pending - Appointment has not been Scheduled				
Referral Pending - Scheduled Appointment				
Referral Pending - Need 2151				
Referral Pending - 2151 Past Due				
Referral Pending - No Contact From Customer / Recommend Conciliation				
Referral Rejected				
Referral Accepted & Enrollment Started - Enrollment Required				
Referral Accepted & Enrollment Verified				
IDHS Indicated Customer is Exempt and Elects to Participate				
IDHS Indicated Customer is Exempt and Customer Did Not Attend Initial CBO Appointment				
IDHS Indicated Customer NOT Currently EPIC Eligible				
Withdrew From Study				
Total = Verified Eligible New Cohort + Original EPIC Assigned to 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				
Enrolled Customers - 2151A Forms Up-to-date				
Exited Customers - Follow-Up Required & 2151A Forms Up-to-date				
Exited Customers - Follow-Up Not Required				
Total				
2151A Client's Progress: (Based on 2151A Up-to-date uploaded forms)				

New

	Count	%	Loss Rate	Success Rate
Situation Worse				
No Progress				
Minimal Progress				
Acceptable Progress				
Substantial Progress				
Non-Cooperation				
Conciliation				
Total				
CBO Recommending Course of Action				
No Longer Appropriate for Provider Services				
IDHS Review - Recommend Sanction				
Total				
Completion Status				
In Follow-Up Period				
Completion Status - Completion Documentation Needs Uploaded				
IDHS Indicated SNAP Ineligible - CBO Action Required				
Hired by Employer (30 hours/week or 120 hours/month) - Uploaded Completed 2151A & Documentation				
Hired by Employer (Less than 30 hours/week or 120 hours/month) - Uploaded Completed 2151A & Documentation				
Continuing Higher Education Outside of EPIC - Uploaded Completed 2151A & Documentation				
Enlisted in Military - Uploaded Completed 2151A & Documentation				
Dropped Out of Program - Uploaded Completed 2151A				
No Longer SNAP Eligible - Uploaded Completed 2151A				
Moved Out of State or Region - Uploaded Completed 2151A				
Incarcerated - Uploaded Completed 2151A				
Completion - Withdrew From Study				
Total				