

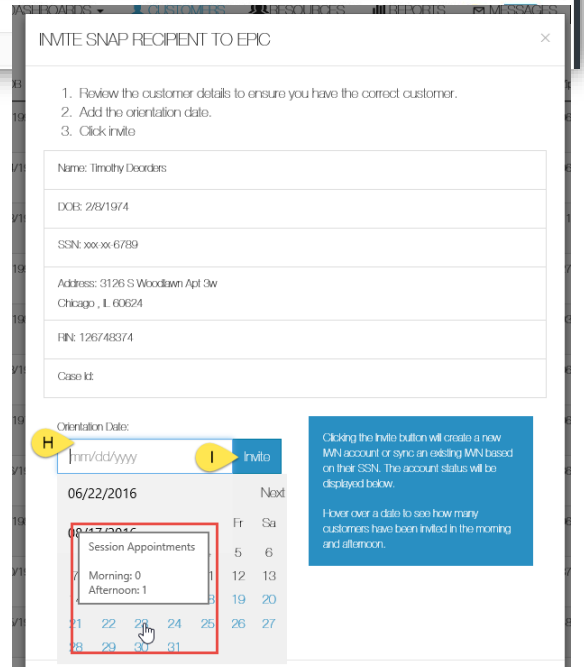
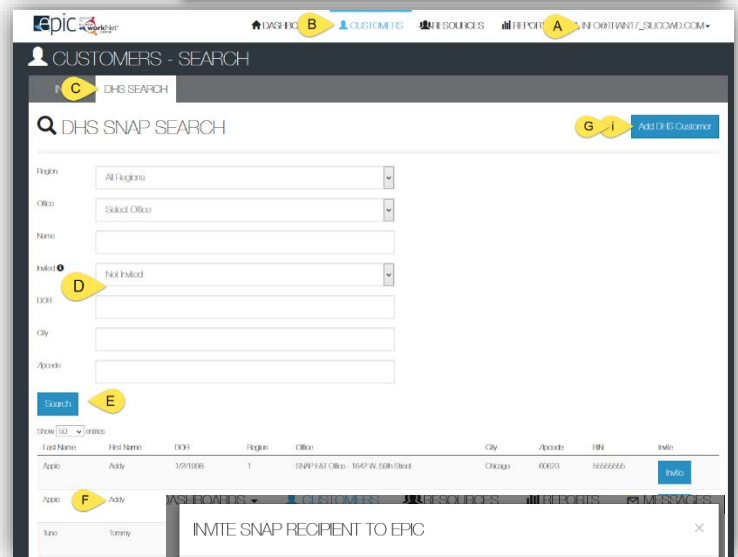
Invite customers to EPIC Orientation.

1. Sign up customers for the orientation session using the EPIC tools.

- A. **Login** to your EPIC dashboard for partners (only) <http://www.illinoisworknet.com/EpicDashboard>.*
- B. Go to **Customers** tab in dashboard menu at top of screen.
- C. **Select DHS Search Tab** to find or add DHS customers.
- D. **Use the search criteria** to narrow results.
 - i. Region
 - ii. Office (depending upon status you may only have one office.)
 - iii. Customer Name
 - iv. Invitation Status (Not Invited)
 - v. Date of Birth
 - vi. City
 - vii. Zip Code
- E. **Select search** to find the name in the search results.
- F. From the results, **find the correct person**.
- G. For training, we are going to pretend that you do not see your customer in the list.
 - i. Select **Add DHS Customer**
 - ii. Enter the required information –
 1. Name,
 2. Office
 3. SSN
 4. RIN & Case ID - If you do not have the RN and DHS Case ID, there is a box to check. You will be required you to add the information before the eligibility review.
 5. Date of Birth
 6. Address
 - iii. Add DHS customer and select the customer from the list (**select the invite button**).
- H. On the new screen that opens - **Enter** the orientation date.
 - i. Review the number of appointments already scheduled. Most locations will have a limit.
 - ii. **Select** Morning or Afternoon time slot.
- I. **Select the Invite button** to add them to your list. Then your customers will appear in the intake tab and on your dashboard.

Why Invite Customers to Orientation?

- Illinois workNet account is automatically created.
- Gives customers access to the application.

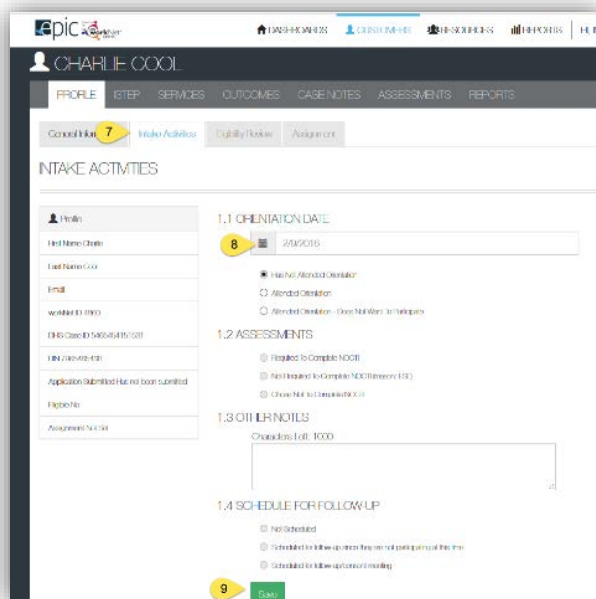
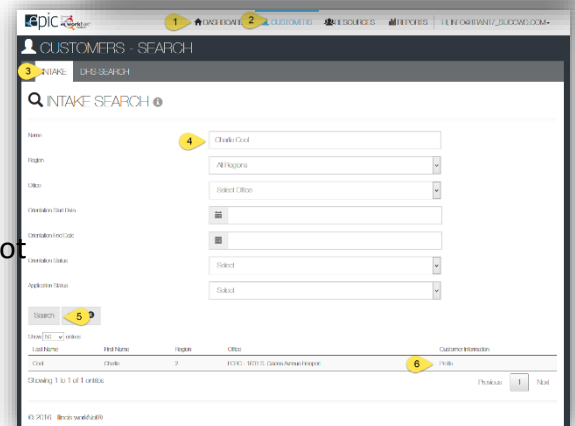
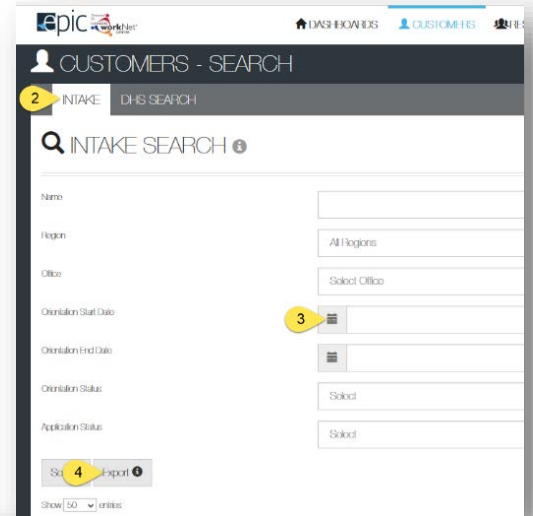


- i. If the person does not have an Illinois workNet account, an account will be created. **Write down** the customer's username and password on their EPIC Orientation handout. *Note: This information is also available when you export the list of the Intake customers.*
 - ii. If the person already has an account, the status will show the account was synced with an existing account. Password recovery information is available to update the customer's password information. Write the customer's username on their EPIC Orientation handout.
2. Go to the **Intake Tab** to check the names entered for orientation.
 3. Filter by date of orientation, then click Search.
 4. Export the list of customers for the session. This will include information to help customers log into their account. To prepare for your customer EPIC Orientation, you can print the exported list to have on hand.

Change Orientation Date:

Should one of your customers contact you to let you know that they cannot make a scheduled orientation session, follow these steps:

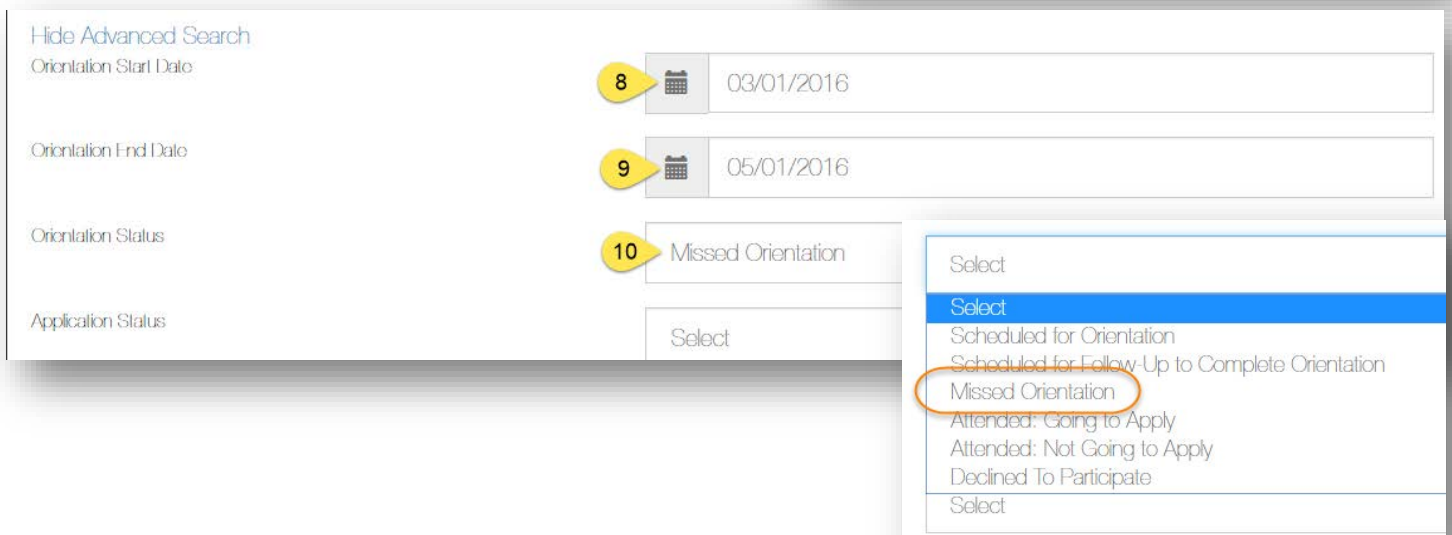
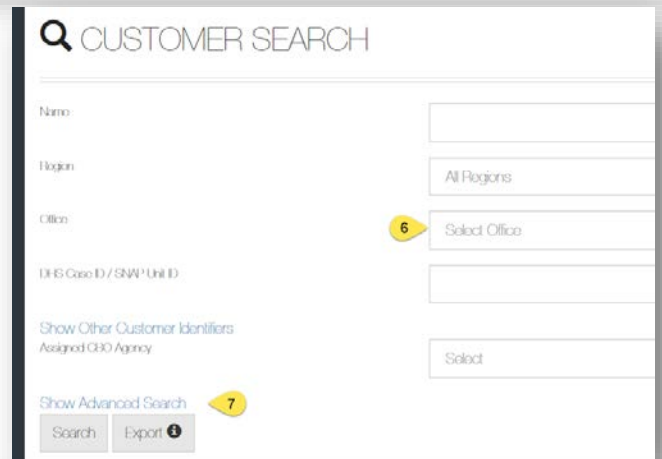
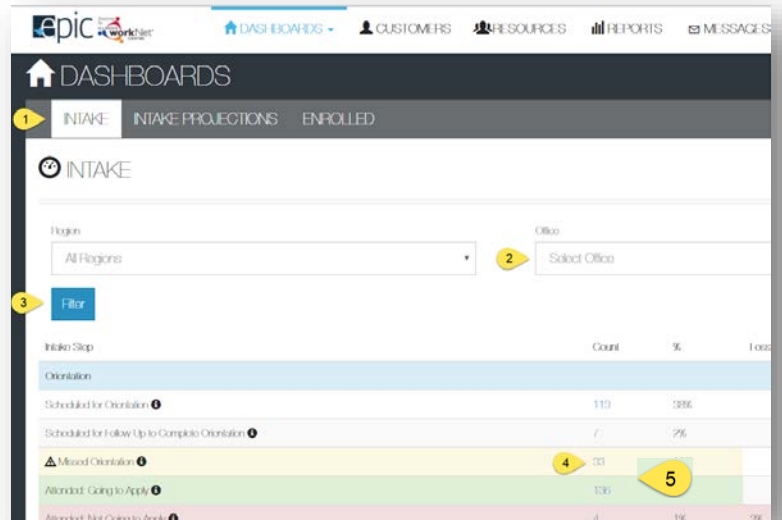
1. Go to your dashboard.
2. Click the Customers tab.
3. Click the Intake tab.
4. Enter the name for your client.
5. Click the Search Button.
6. Click Profile in the results by your customer's name.
7. Click on Intake Activities Tab.
8. Change the date of the orientation. You may also click has not attended orientation.
9. Click the Save Button.



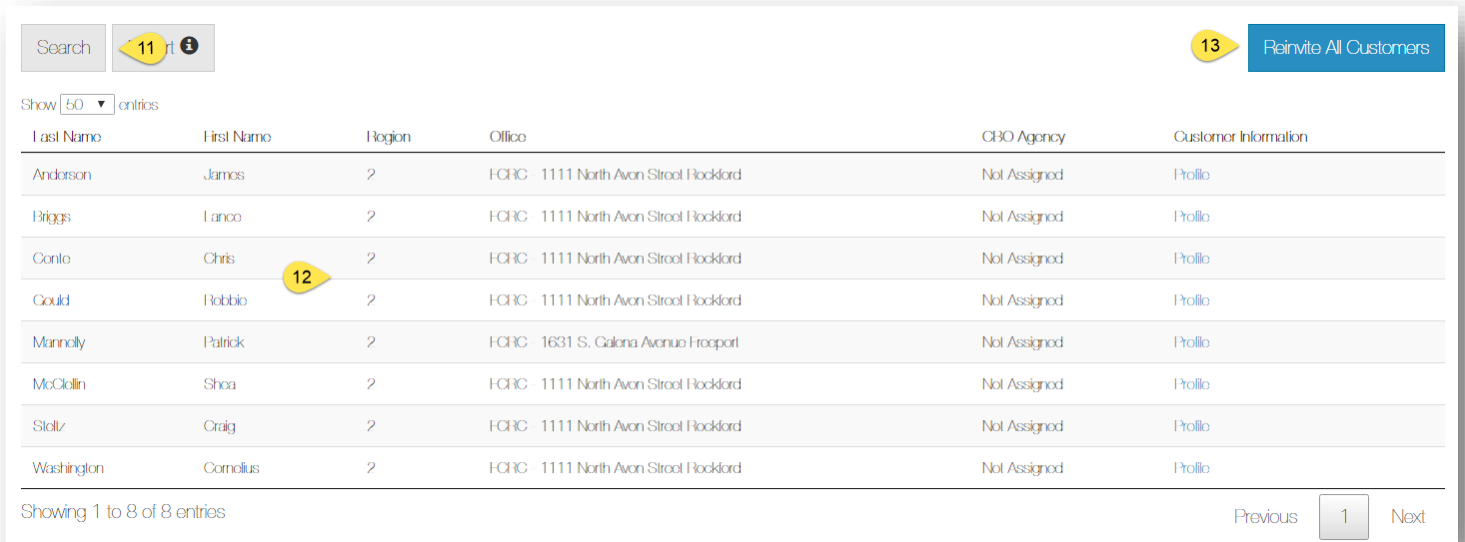
*If you are with an EPIC partner organization but cannot access the tools via your dashboard, you need to request access. Please email epi@illinoisworknet.com

Group Re-invite Customers Who Did Not Attend Original Orientation Date

1. Go to the Intake Dashboard.
2. Select Office if more than one in your region.
3. Select Filter
4. See the number in the Missed Orientation line of the dashboard. *If this number is greater than the number of spaces you have available in your orientation space, you may need to use additional filters to narrow the results.*
5. Select the number in the dashboard to see the list of people who missed orientation.
6. On the next screen, you can filter by office if you did not filter previously.
7. To narrow the search results, select Show Advanced Search.
8. After the Advanced Search filters open, select a date range of orientations for which you want to re-invite people. Select a Start Date.
9. Select an End Date for the time period you want to cover.
10. Select Missed Orientation from the drop-down choices.



11. After you have the search parameters entered, select the Search button.
12. The list of participants who missed orientation between the dates you specified will appear.
13. Select the Re-invite All Customers button to do a group invite.



Last Name	First Name	Region	Office	CBO Agency	Customer Information
Anderson	James	2	FCRC 1111 North Avon Street Rockford	Not Assigned	Profile
Biggs	Lance	2	FCRC 1111 North Avon Street Rockford	Not Assigned	Profile
Conte	Chris	2	FCRC 1111 North Avon Street Rockford	Not Assigned	Profile
Could	Robbie	2	FCRC 1111 North Avon Street Rockford	Not Assigned	Profile
Mannolly	Patrick	2	FCRC 1631 S. Calena Avenue Freeport	Not Assigned	Profile
McClain	Shoa	2	FCRC 1111 North Avon Street Rockford	Not Assigned	Profile
Stolz	Craig	2	FCRC 1111 North Avon Street Rockford	Not Assigned	Profile
Washington	Cornelius	2	FCRC 1111 North Avon Street Rockford	Not Assigned	Profile

first time?

14. A pop-up window will open. Click in the box next to the calendar icon to see a calendar or type the date in the box. Be sure to select a date at least 24 hours in the future.
15. Select Save. All of the customers on your list have been invited at one time!

