

## 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 the **Customers** tab in the dashboard menu at top of screen.

C. Select **DHS Invite** tab to find or add DHS customers.

D. **Use the search criteria** to narrow results.

- Region
- Office (depending upon status you may only have one office)
- Customer Name
- Invitation Status (Not Invited)
- Date of Birth
- City
- Zip Code

E. Select **Search** to find the name in the search results.

F. From the results, **find the correct person**. Click the **Invite** tab to the right.

G. If you do not see your customer in the list:

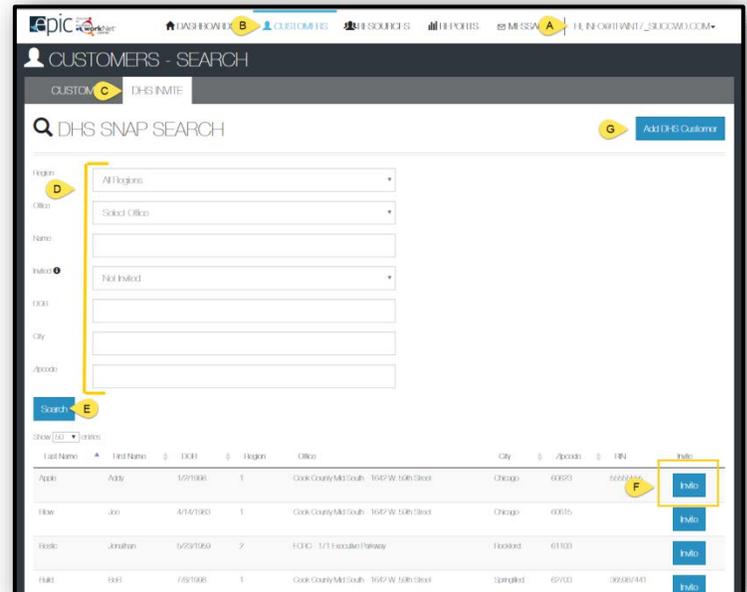
- Select **Add DHS Customer**.
- Enter the required information:
  - First & Last Name
  - Social Security Number & confirm
  - Office – if a feeder, select the appropriate pod.
  - RIN & Case ID - If you do not have the RIN and DHS Case ID, check the box. Numbers must be entered before eligibility review.
  - Date of Birth
  - Address
- Add DHS Customer** and select the customer from the list (OR, select **Add and Invite DHS Customer**).

H. On the new screen that opens - Enter the **Orientation Date**.

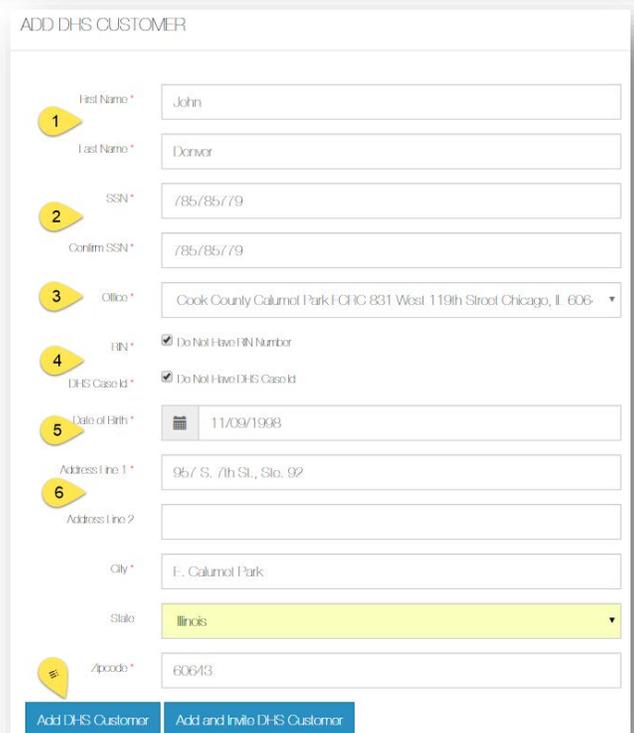
i. Review the number of appointments already scheduled. Most locations will have a limit.

### Why Invite Customers to Orientation?

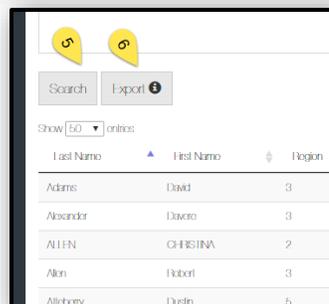
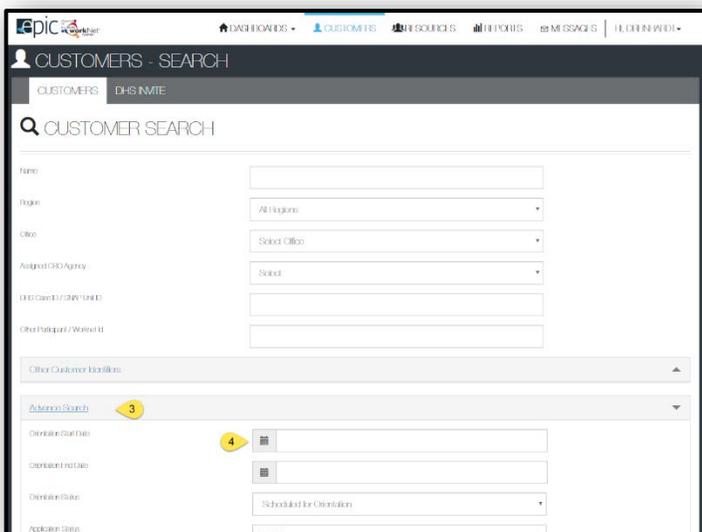
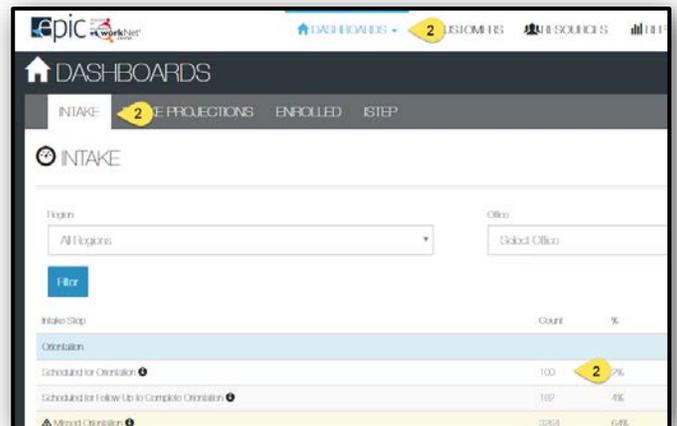
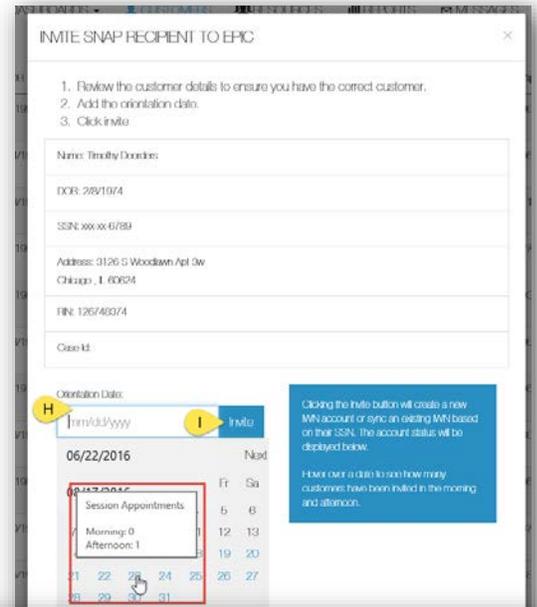
- Illinois workNet account is automatically created.
- Gives customers access to the application.



Last Name	First Name	DOB	Region	Office	City	Zipcode	RIN	Invite
Andy		1/27/1986	1	Cook County/Mt South - 1642 W. 56th Street	Chicago	60623	5622/000	Invite
John	John	4/14/1983	1	Cook County/Mt South - 1642 W. 56th Street	Chicago	60615		Invite
Jonathan	Jonathan	5/25/1969	2	FDIC - 1711 Franklin Parkway	Rockford	61103		Invite
Rafael	Rafael	7/27/1986	1	Cook County/Mt South - 1642 W. 56th Street	Springfield	62703	392687441	Invite



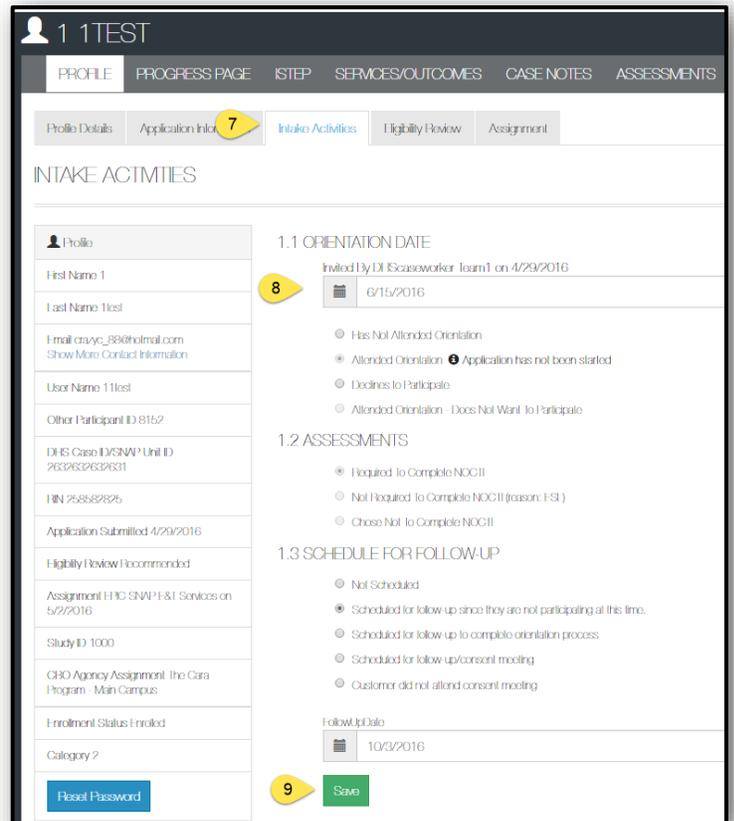
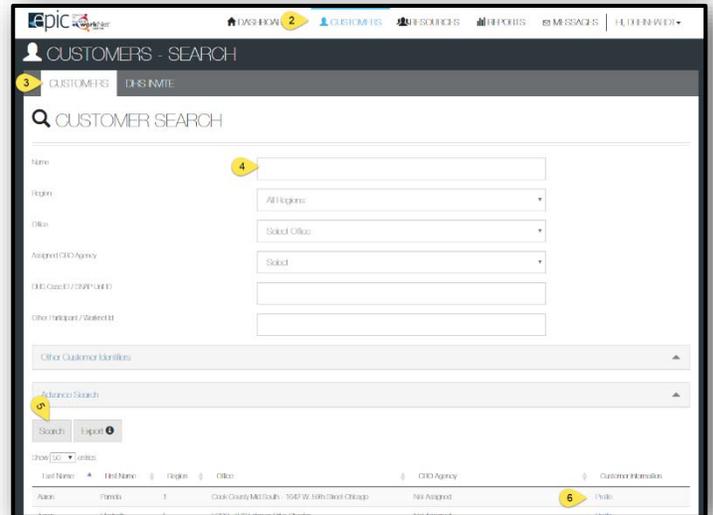
- ii. Select **Orientation Session** - Morning or Afternoon time slot.
- I. Select the **Invite** button to add them to your list. Then your customers will appear in the **Intake** tab and on your dashboard.
  - i. If the person does not have an Illinois workNet account, an account will be created. **Write 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 down** the customer's username and password on their EPIC Orientation handout.
2. Go to the **Intake** dashboard. **Click** the number to the right of Scheduled for Orientation. A new window will open.
3. Click **Advance Search**.
4. **Filter** by date of orientation.
5. Click **Search**, found at the bottom of the screen.
6. **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 notify you that they are unable to attend a scheduled orientation session, follow these steps:

1. Go to your dashboard.
2. Select the **Customers** menu item.
3. Click the **Customers** tab (it should default here).
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 **Intake Activities** tab.
8. Change the date of the orientation. You may also click "has not attended orientation."
9. Click **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 [epic@illinoisworknet.com](mailto:epic@illinoisworknet.com).

**Group Reinvite 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 row of the dashboard and select that number. *If this number is greater than the available number of spaces (in your orientation space), you may need to use additional filters to narrow the results.*
5. On the next screen, you can filter by office (if not filtered previously).
6. To narrow the search results, select **Advance Search**.
7. After the Advance Search filters open, select a date range of orientations for which you want to reinvite people. Select an **Orientation Start Date**.
8. Select an **Orientation End Date** for the time period you want to cover.
9. Select **Missed Orientation** from the drop-down choices.

Intake Step	Count	%	Loss
Scheduled for Orientation	11	3%	
Scheduled for Follow-Up to Complete Orientation	8	2%	
<b>Missed Orientation</b>	<b>156</b>	45%	
Attended: Going to Apply	164	47%	
Attended: Not Going to Apply At This Time	4	1%	2%

**CUSTOMER SEARCH**

Name:

Region:

Office:

Assigned CBO Agency:

DHS Case ID / SNAP Unit ID:

Other Participant / Worknet Id:

**Other Customer Identifiers**

Advance Search

Search Export

**Advance Search**

Orientation Start Date:

Orientation End Date:

Orientation Status:

Application Status:

- Select
- Select
- Scheduled for Orientation
- Scheduled for Follow-Up to Complete Orientation
- Missed Orientation**
- Attended: Going to Apply
- Attended: Not Going to Apply
- Declined To Participate
- No Longer SNAP Eligible
- Conciliation/Sanction Process Has Started



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

Search    Export ⓘ

Show 50 entries

Last Name	First Name	Region	Office	CBO Agency	Customer Information
Addams	Morticia	5	FCRC - 800 South Locust Street Centralia	Not Assigned	<a href="#">Profile</a>
Aldrich	Celeste	1	Cook County Mid South - 1642 W. 59th Street Chicago	Not Assigned	<a href="#">Profile</a>
Anderson	James	2	FCRC - 171 Executive Parkway Rockford	Not Assigned	<a href="#">Profile</a>
Bass	David	1	Cook County Mid South - 1642 W. 59th Street Chicago	Not Assigned	<a href="#">Profile</a>
BGTEST1	SW-BG1	1	Cook County Mid South - 1642 W. 59th Street Chicago		
BGTEST4	NS-BG2	1	Cook County Mid South - 1642 W. 59th Street Chicago		

[Reinvite All Customers](#)

If all of these people show up, will each one have a seat in your orientation room?

Are you inviting these customers to a special orientation time, or to an orientation where people are invited for the first time?

- 13. 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.
- 14. Select **Save**. All of the customers on your list have been invited at one time!

REINVITE CUSTOMERS

Choose a new orientation date for these 158 customer(s).

New Orientation Date

Prev Aug 2016 Next

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Save

