

What to do When Meeting with a Customer for Random Assignment

Meet with the customer after they complete their application.

This meeting establishes Random Assignment.

1. **Log In** to your Illinois workNet Account – <https://illinoisworknet.com>.
2. Go to the **EPIC dashboard**.
3. Main Menu > Select **Customers** tab (default tab).
4. Select **Intake** tab (default tab).
5. Search for participant **Name**.
6. Click **Profile** on right side of person in search results.
7. Leave this window open to be able to copy and paste information.

EPIS Survey

1. Log in to EPIS <https://www.snapet-epis.com>.
2. Enter your EPIS username and password.
3. Click **Participants** tab from the Menu.
4. Click **Enroll new participant** button in the upper right corner.
5. Enter the participants name, social security number, date of birth, and intake location (associated with the local workforce area).
6. **SNAP Unit Id** is the DHS case ID. Enter the entire number. Copy and paste from the EPIC profile for accuracy.
7. **Other Participant Identifier** is the Other Participant ID above the DHS case ID in the box on the left side of the person's profile. Copy and paste from the EPIC profile for accuracy.
8. **Select County** and identify whether the participant is a mandatory SNAP E&T participant.
9. **Continue**. Review the list to see if there is an existing participant in the system. If not, **continue**.
10. Proceed with the **Informed Consent** (or checklist if mandatory participants heard the recorded informed consent). **Print Consent** form for participant, **Save and Continue**.
 - a. If participant does not give consent, you are finished. Return to EPIC and check appropriate items.
11. **Complete** the survey questions if the participant consents.
12. **Validate Form** to see any errors in the survey and make any corrections.
13. **Complete and Randomly Assign**.
14. Based upon the assignment. **Read the appropriate letter** to the participant. Found in EPIS binder on pages 133-137. If participant has questions about why they were assigned a certain way, visit the FAQ in the EPIS binder on page 47.
15. **Return to EPIC**.

EPIC Profile Assignment Tab

1. Back in the participant's profile in EPIC, go to the **Assignment** tab.
2. You should see the assignment from EPIS. If you don't click into another tab then return to the **Assignment** tab.
 - a. If assigned to SNAP E+T you are done with the participant. Download and Print the SNAP or Community Only Services Notification Letter.
 - b. If assigned to EPIC, continue with the remaining steps.
3. EPIC assignment, requires a few more steps.
4. Select a **program**.
5. Designate the DHS **primary contact**.
6. **Save**.
7. **Schedule** appointment with CBO.
8. **Download Referral Form**, and then **print** a copy to give participant.
9. **Download EPIC- Snap Notification Letter**, and then **print** a copy to give to the participant.
10. Select **View Program Information**, and then **Print Page** and give a copy to the participant.

Choose Not to Participate

There are a number of reasons why a participant may choose not to participate after the eligibility process has been completed:

- They do not like the choices of training opportunities;
- They didn't realize there was training before they got a job;
- Their situation changed between the application appointment and follow-up appointment.

Follow the **EPIS survey** section steps (above) to capture the data for the individual.

1. Enter the participant information.
2. On the informed consent page, check the box that indicates the person is not giving consent.
3. Return to EPIC, go to **Profile Details** tab, mark person as **Decline to Participate** under **Update Customer Status** section.
4. If they are mandatory, refer them through the local job placement program procedures.

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