

Rejected Referral Process

EPIC customers may be rejected for reasons that include:

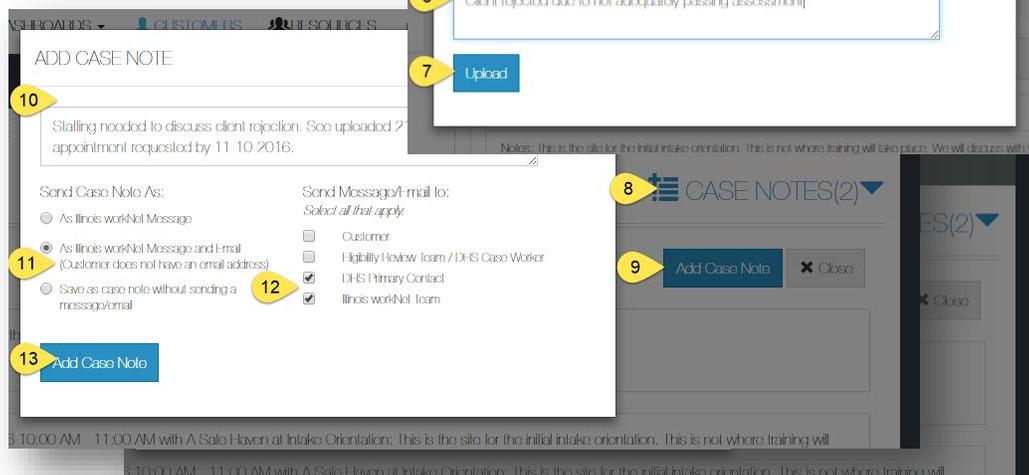
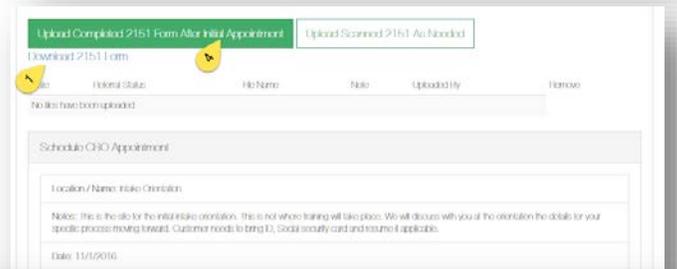
- Customer attends CBO intake orientation already employed.
- Customer misunderstood EPIC participation during DHS orientation.
- Customer wanted a different career pathway not offered by current CBO.
- Customer does not meet the minimum qualifications of the training program.
- Customer creates an incident that disrupts the CBO ability to provide services to the customer.

Search then select Customer from Customer list > **Select** Progress Page for customer in list of results from Customers list > **Select** Progress Page tab of customer.



On the Progress Page

1. **Download 2151.**
2. **Mark Referral Rejected** in Adobe Reader or Acrobat.
3. **Mark** reason why they are rejected.
4. **Select** box to upload 2151.
5. **Choose File** to upload.
6. **Add note in Description** box with reason for rejection.
7. **Click** Upload button.
8. Scroll to top of page and **select** Case Notes.
9. **Add** Case Note.
10. **Add** message in case note box (i.e. *Staffing needed to discuss client rejection. See uploaded 2151. Staffing appointment requested by 11-10-2016*).
11. For **Send Case Note As**, **select** As Illinois worknet Message and Email.
12. **Select** and include the Illinois workNet Team.
13. **Select** Add Case Note.
14. If the customer has been engaged and causes an incident, **access** the Incident Reporting form from the EPIC



Partners Restricted Resources Page.

- Fill in Customer information.
- Fill out current activity.
- Fill out reason for staffing.

15. Scroll to bottom of Progress Page to **Change in Activity / Monthly Update**.

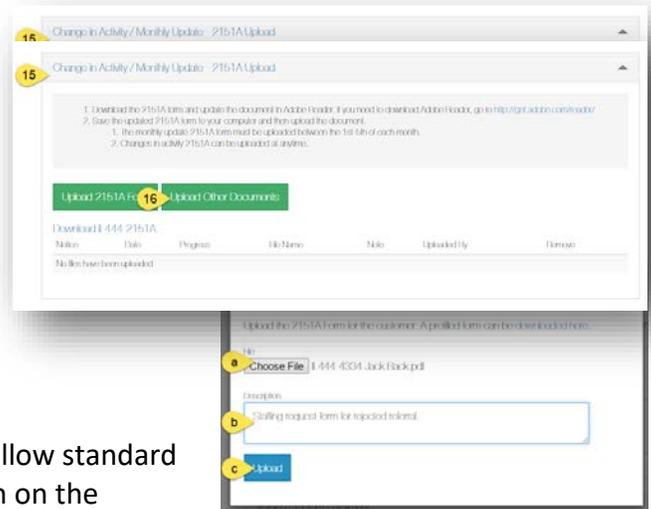
16. **Select** Upload Other Documents.

- Select the Incident Reporting form.
- Enter a description.
- Select Upload.

17. DHS will schedule an appointment in which the DHS primary contact, customer, and CBO will meet by phone to determine why the referral was rejected.

18. Following the phone appointment, DHS primary contact will work with Illinois workNet staff in the event the referral needs to be transferred to another CBO.

19. If customer is reassigned, DHS Primary contact will follow standard scheduling procedures by using the schedule function on the customer's Progress Page > Initial CBO Appointment section.



Change in Activity / Monthly Update - 2151A Upload

16 Change in Activity / Monthly Update - 2151A Upload

15 Change in Activity / Monthly Update - 2151A Upload

1. Download the 2151A form and update the document in Adobe Reader. If you need to download Adobe Reader, go to <http://get.adobe.com/reader/>
2. Save the updated 2151A form to your computer and then upload the document.
1. The monthly update 2151A form must be uploaded between the 1st and 5th of each month.
2. Changes to a 2151A can be uploaded at any time.

Upload 2151A Form Upload Other Documents

Download 444 2151A

Name	Date	Program	File Name	Size	Uploaded By	Download
No files have been uploaded.						

Upload the 2151A form for the customer. A pre-filled form can be downloaded from:

File: Choose File 1-444-4004 Jack Back.pdf

Description: Staffing request form for rejected referral.

Upload

If you need to download Adobe Reader click here: <http://get.adobe.com/reader/>