

## **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

Search then select Customer from Cu Select Progress Page for customer in Customers list > Select Progress Page

## **On the Progress Page**

- 1. Download 2151.
- 2. Mark Referral Rejected in Add Acrobat.
- 3. Mark reason why they are rej
- 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 Staffing appointment requeste
- 11. For Send Case Note As, select Message and Email.

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- 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

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Partners Restricted Resources Page.

- a. Fill in Customer information.
- b. Fill out current activity.
- c. Fill out reason for staffing.
- 15. Scroll to bottom of Progress Page to Change in Activity / Monthly Update.
- 16. Select Upload Other Documents.
  - a. Select the Incident Reporting form.
  - b. Enter a description.
  - c. 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.
- 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.
- 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.

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

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