

Staffing Reports and Document Creation

EPIC customers will be staffed with DHS per the DHS Staffing Protocol.
<http://www.dhs.state.il.us/page.aspx?item=82872> (See below)

CBO Actions

To assist with the DHS required reporting, we have established a staffing packet that can be created by following these instructions. DHS and the CBO can access the Staffing Report tool.

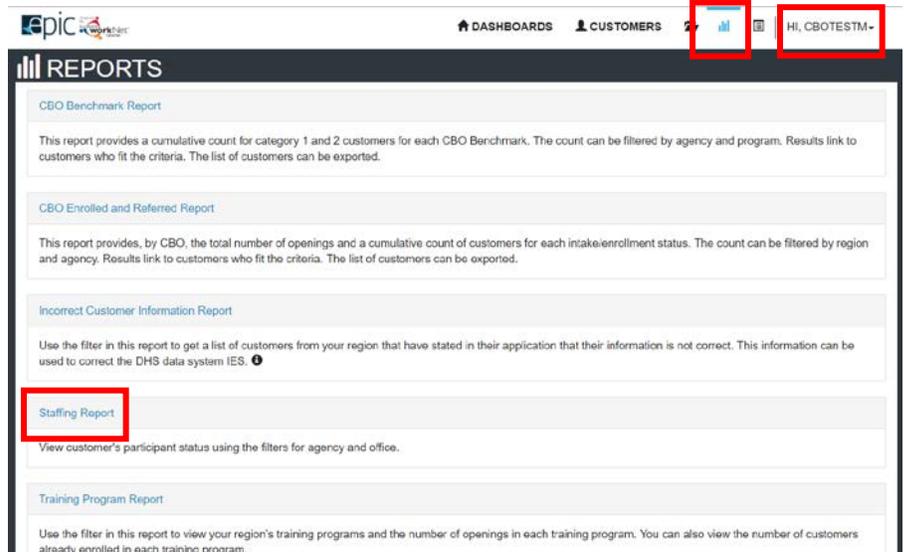
Before creating your staffing packets, for each customer for whom you will be staffing, please ensure that you have:

- Completed a monthly status update (2151A) and uploaded to customer EPIC progress page
- Uploaded any other documents reflecting activity during the staffing month – e.g. 2151, 2846g, or 3392
- Updated ISTEP activities
- Added appropriate case notes
- Prepared a progress statement for the 4334

Time Saving Tip:

Prepare a statement that summarizes the customer's activity for the previous month. Add it as a case note first, then copy and paste the statement to the Comment section of the 2151A and step 5 of the staffing packet for the customer.

1. Log into your EPIC account
2. **Select** Reports
3. Scroll down – **Select** Staffing Report



Instructions:

1. Filter list of customers by office and staffing report month (month prior to the current month).
2. Complete the staffing packet for each person by selecting the 4334 status link. Save updates and print each package for the meeting.
3. Export 4333 form for each office, each month. Send the 4333 to the office contact and print a copy for the staffing meeting. The export/send buttons will be available once staffing packets are started.

REPORTS

STAFFING REPORT

Agency *

Central States SER - Healthcare Bridge 3948

Local Office *

Select

Staffing Month

April 2017

MEETING INFORMATION

Staffing Date

Staffing Time

Staffing Contact Information

Instructions

1. Filter list of customers by office and staffing report month (month prior to the current month).
2. Complete the staffing packet for each person by selecting the 4334 status link. Save updates and print each package for the meeting.
3. Export 4333 form for each office each month. Send the 4333 to the office contact and print a copy for the staffing meeting. The export/send buttons will be available once staffing packets are started.

Filter
Export 4333 Form
Export Customers
Save Meeting Info
Print Meeting Info

Show 10 entries

Customer Name	DHS Case Id	4334 Status & Staffing Packet	Staffing Packet Needed	Provider Participant Status	2151A Status
A. Smith	0821801123456	CBO/DHS Completed	☑	AP	Acceptable Progress
J. Brown	9420322322220	Started	☑	AP	
j. bulford	0820301117739	Print 2151 Only	☑	NC	
M. Mtest	0820376459874	Print 2151 Only	☑	NC	

Local Office *

Southeast (1)

Select

Western (0)

South Loop (0)

Mid South (4)

Uptown (0)

Englewood (0)

Woodlawn (0)

Calumet Park (0)

Southeast (1)

South Suburban (0)

Lower North (0)

West Suburban (0)

Humboldt Park (0)

Roseland (0)

Northwest (0)

Northern (0)

Special Units (0)

Showing 1 to 14 of 14 entries

4. Create Staffing Report - The Staffing Report opens to reveal the entire list of the agency customers and includes the following items:
 - a. **Agency Name** – DHS can select any agency. The CBO will only see assigned customers.
 - b. **Select** the *Local Office* (Cook County) or FCRC office (rest of state) to complete the staffing paperwork. Each office has a number following the name that indicates how many customers are associated with that office. DHS will only see customers assigned to their local office.
 - c. **Select Staffing Month**. Currently, this will default to the most recently completed month. Future enhancements will allow past months to be selected.
 - d. **Select** Filter. The customers associated with the office selected will filter in the list below.
 - e. **Customer Name** can be filtered alphabetically. Click on the customer name to access the customer profile to make any adjustments.
 - f. **DHS Case ID** lists the customer DHS case ID.
 - g. **4334 Status & Staffing Packet** indicates the status of that customer’s packet. Create customer staffing packet by selecting this item. It will open to the next screen (see below).
 - i. *Print 2151 Only* – the customer has not been enrolled, only the 2151 will be included in the packet information.

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- ii. *Not Started* – indicates that nothing for that customer has been selected.
 - iii. *Started* – indicates that the CBO has at minimum clicked into the items to create the staffing packet for DHS review. This will remain in “Started” status until after a signed 4334 is uploaded in the second step.
 - iv. *CBO Completed* - indicates that the CBO signed follow-up document has been uploaded on the “Provider/DHS Completes After Staffing” screen.
 - v. *CBO/DHS Completed* – indicates that the DHS and CBO signed follow-up document has been uploaded on the “Provider/DHS Completes After Staffing” screen.
- h. **Staffing Packet Needed** allows CBO/DHS to uncheck the packets that do not need to be completed. Only checked customers will appear on the 4333 form.
- i. **Provider Participant Status** based upon codes as indicated on the most recently uploaded 2151A.

State of Illinois Department of Human Services Employment and Training Participant List					
Provider: Central States SER - Healthcare Bridge			Program: EPIC		
Local Office: Southeast (1)			Date: April 2017		
1. 2. 3. 4. 5. 6. 7. 8. 9. 10. 11. 12. 13. 14. 15. 16.	Participant Name	Case Number	*Participant Status		Check if Staffing Needed
			Provider	Local Office	
1.	A. Smith	0821801123456	AP		
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					
11.					
12.					
13.					
14.					
15.					
16.					

*Note: Both the L.O. and the Provider must complete. Use the following codes:
AP - Active Participation C - Canceled/Ineligible JS - Job Readiness
NC - Non-cooperation SA - Sanctioned SW - Suspended to Medical
R - Removed from Provider by Local Office UE - Unsubsidized Employment

- i. AP – indicates Acceptable Progress for customers who are exempt or eligible and marked as, Acceptable Progress or Substantial Progress.
 - ii. NC – indicates Non-Cooperation for customers who are exempt or eligible and marked as anything less than the status for Acceptable Progress.
 - iii. C – indicates customers who are ineligible or withdrawn.
- j. **2151A Status** is status indicated on 2151A in staffing packet.

EPIC Restricted Resources

Back to EPIC Partner Guide. Back to Full List of Resources

The resources on this page are restricted to users that have access to EPIC tools within Illinois WorkNet.

DHS Resources **CBO Resources**

CBO Contacts & Location Info. for DHS Staff

- Map of DHS-R CBO Offices
- CBO Contact List for DHS Staff (PDF)

DHS Contact & Location Info. for CBO Staff

- Map of DHS & CBO Offices
- DHS Primary Contacts for CBOs (PDF)
- DHS Region 1 pod and feeder list (PDF)

DHS EPIC Instruction Guides

5. **Export** a 4333 Form

- k. **Export** the 4333 Form. Export a separate list for each DHS office with which you need to staff customers.
 - i. **Email** the 4333 to the DHS office primary contact at least *3 days prior* to the scheduled staffing.
 - ii. **Upload** each 4333 report to your agency uploads.
 - iii. Find the current DHS Primary / Secondary contact list by clicking here:

RESOURCES

AGENCIES

CENTRAL STATES SER - HEALTHCARE BRIDGE

Address: 1841 W. 29th Street Chicago, IL 60653

Phone Number: 773-694000

Agency Details Training Programs Schedules **Uploads**

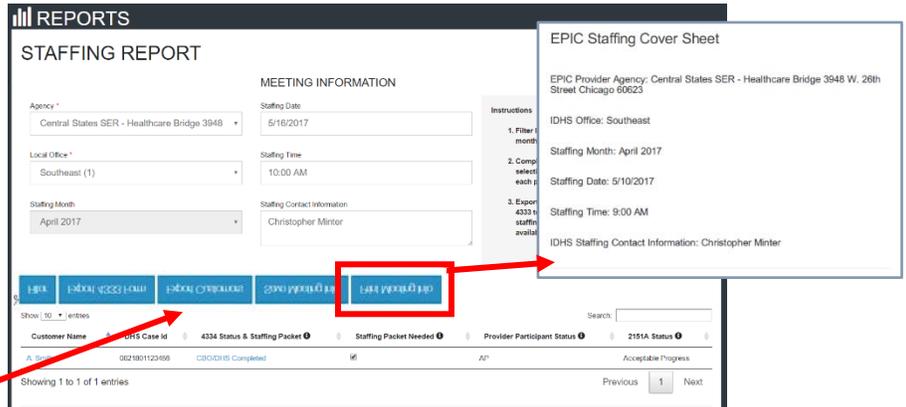
Upload File

Date	File Name	Display
3/22/2017 9:57 AM	0810 2010 quick reference.pdf	CRBOR

<https://www.illinoisworknet.com/partners/EPIC/EPICRestrictedDocuments/DHS%20Primary%20Contacts%20for%20CBOs.pdf>

- l. **Create** a cover sheet. Add in the date/time/contact at any time and **save** the information for the staffing month – this creates a record of the meeting saved in the EPIC system. **Enter** the staffing date – this will populate the cover sheet.
- m. **Enter** the staffing time – this will populate the cover sheet.
- n. **Enter** the Staffing Contact Information - this will populate the cover sheet.

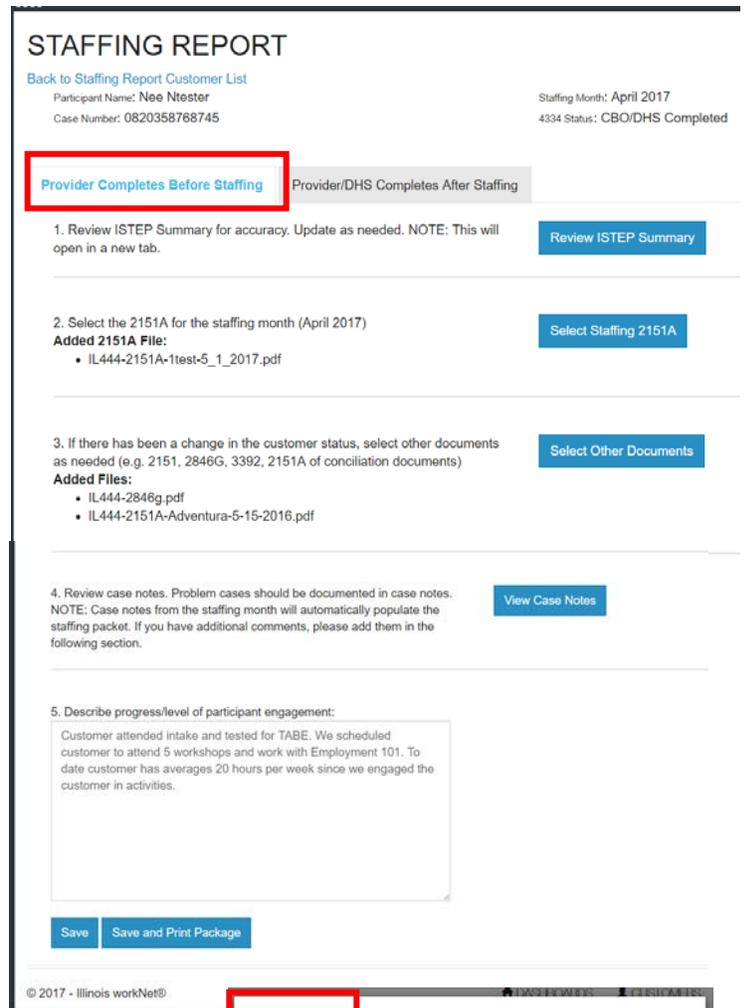
- o. **Save Meeting Info** – Saves the information entered in the above sections for future clicks.
- p. **Print Meeting Info** – creates a PDF document that can be used as a reference for the meeting, or as a cover to send staffing documents by mail or delivery to the DHS office.



Export Customers allows you to print a list of all customers or a filtered list with all of the Staffing Report items in the exported list.

The next step is to prepare the actual packet of customer documents.

1. The screen opens to the tab “Provider Completes Before Staffing”.
2. Verify the correct customer information is listed.
3. Step 1. Review ISTEP Summary – **Click** the box. A new window opens to the customer’s ISTEP, where updates can be made based upon the previous month’s activities. The items that should be included are:
 - a. Steps that were open during the staffing month.
 - b. Currently open steps.
 - c. Steps that were closed during the staffing month.
4. Step 2. Select 2151A – Documents from the 1st of the staffing month through the current day may be selected.
 - a. **Click** the blue button “**Select Staffing 2151A**”
 - b. **Select** one document for this section. If the wrong document is selected, click the blue box again, select the correct document and it will replace the wrong one that you selected.
5. Step 3. Select Other Documents.
 - a. **Click** the blue button “**Select other Documents**”.
 - b. **Select** the documents to add for this section. More than one document may be selected.



- c. Documents that may be included in this section are 2846g, 3392, and any other documents that may have been uploaded to the customer file during the month.
 6. Step 4. View Case Notes – all case notes from the 1st of the staffing month through the day the staffing packet is compiled will be included in the case notes file.
 - a. **Click** the “View Case Notes” button to open a new window on the customer’s case notes tab.
 - b. Add additional case notes at that time. *NOTE: If case notes are added from the Case Notes tab on the EPIC profile, the case note automatically is added to the PROFILE section of the EPIC file.*
 Select the appropriate section – Profile, Progress Page or ISTEP to have the case note added to the appropriate section.
- | Section | Comment | Entered By | Entered |
|----------|---|------------|----------|
| Profile | test case note to see where the note lands if added from the case notes tab. | CBO TestM | 5/3/2017 |
| Progress | A 2151A form has been uploaded with the following status: Acceptable Progress | CBO TestM | 5/2/2017 |
| Progress | test case note for report | CBO TestM | 5/3/2017 |
7. Step 5. Describe progress/level of participant engagement
 - a. **Type** in the text box any notes to describe customer progress. This may be copied from a case note.
 - b. The text typed in this box populates the “Describe Progress/Level of participant engagement” in Section A of the 4334 form part of the staffing package.
 8. **Click** the blue button “Save” to return to complete any of the sections.
 9. **Click** the blue button “Save and Print Package” to create a pdf for DHS review.
 - a. The packet will be labeled Staffing Packet-NAME-MonthYear e.g. Staffing Packet-Smith-April2017.
 - b. Review the packet to ensure all the documents selected appear in the packet.
 - c. A message will appear while the packet is being compiled.
 - d. Save packet to computer.
 10. **Upload** the Signed 4334 staffing document.



Customers who have not yet been enrolled show a different staffing report that includes only the 2151 document and any case notes.

An example of this situation is if the customer was enrolled in the last few days of a month and assessment results have not been received.

1. **Click** the blue button to *Select 2151 Documents*.
2. **Click** the button to *View Case Notes*.
3. **Click** *Save and Print the Package*.

REPORTS

STAFFING REPORT

[Back to Staffing Report Customer List](#)
 Participant Name: janice bulford
 Case Number: 082030117739

Staffing Month: April 2017
 4334 Status: Started

1. Select any uploaded 2151 documents to include in the staffing package.

Added Files:

- IL444-2151-Escobar-5_1_2017.pdf

[Select 2151 Documents](#)

4. Review case notes. Problem cases should be documented in case notes.
 NOTE: Case notes from the staffing month will automatically populate the staffing packet.

[View Case Notes](#)

[Save and Print Package](#)

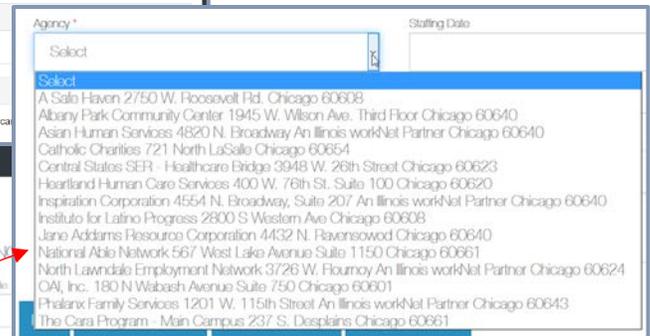
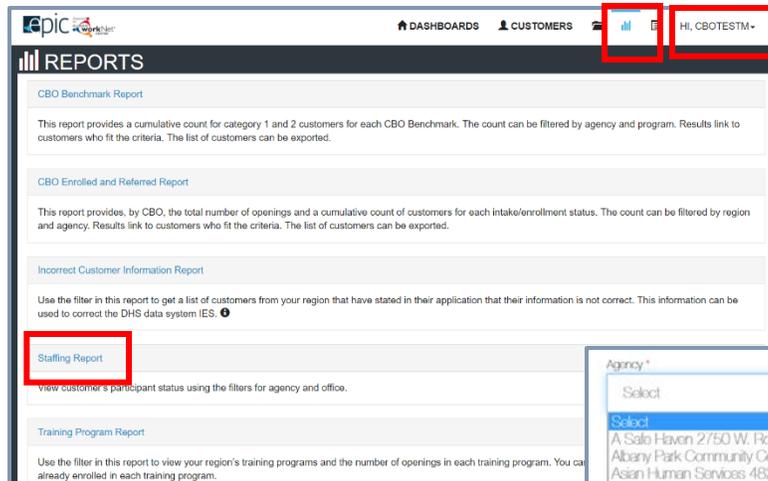
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DHS Action

DHS has the option to access the staffing packet from the staffing tool by following these steps:

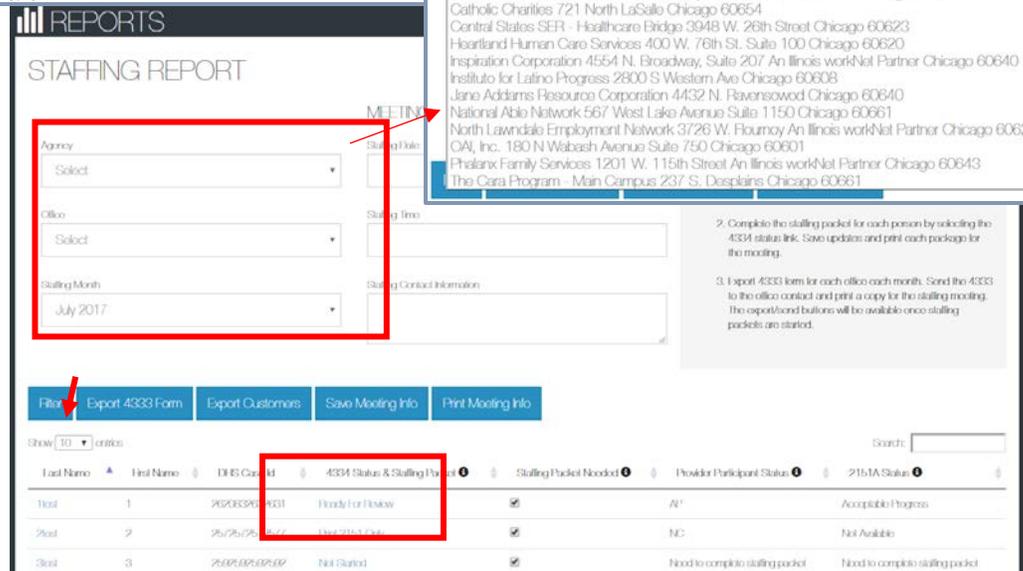
1. Log into your EPIC account.
2. **Select** Reports.
3. Scroll down – **Select** Staffing Report.

The goal of the EPIC online system is to allow paperless transfer documents between DHS and the CBO's. Using the staffing report tool allows DHS immediate access to the staffing packet without emailing forms that contain PII - Personal Identification Information. The CBO's save time and money by not having to mail or deliver packets in advance of staffing appointments.



Once the Report opens:

- **Select** the Agency being staffed.
- **Click** Filter.
- The local office or FCRC is automatically selected.
- **Select** the Staffing month.
- **Click** Filter.



To access the packet for the customer – **click** the “Ready for Review” in the 4334 Status & Staffing Packet column for each customer.

- A new screen will open with the customer staffing packet. Verify customer name.
- Scroll to the bottom of the page – *Provider Completes Before Staffing*
- **Select** Save and Print Package
- A download message will appear
- Save or print the final PDF document.

STAFFING REPORT

Back to Staffing Report Customer List

Participant Name: Nee Ntester
Case Number: 0820358768745

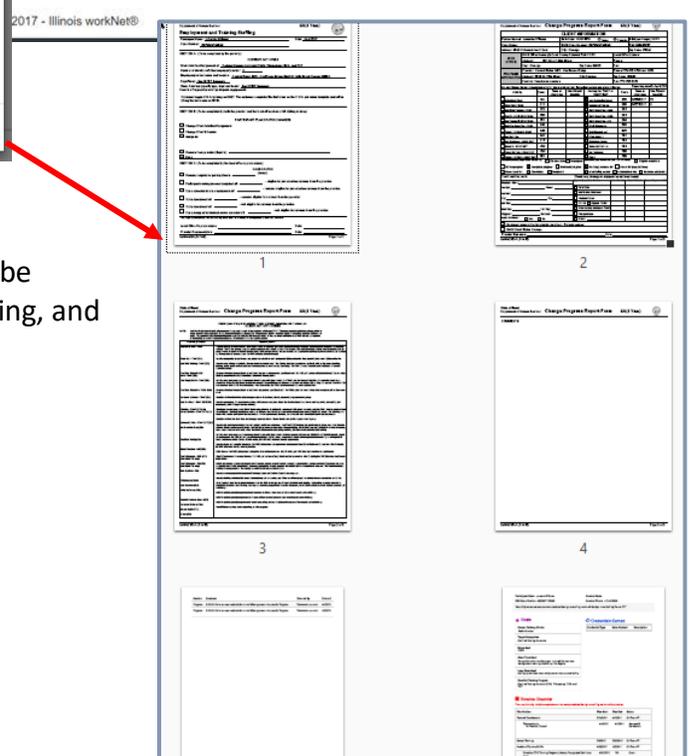
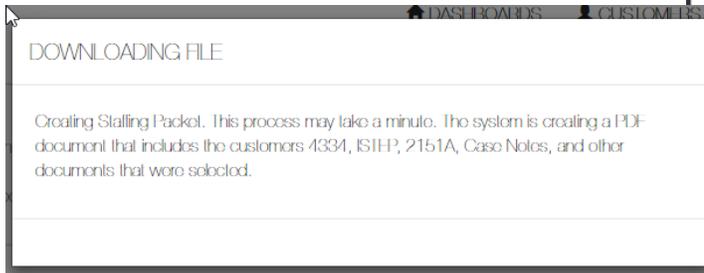
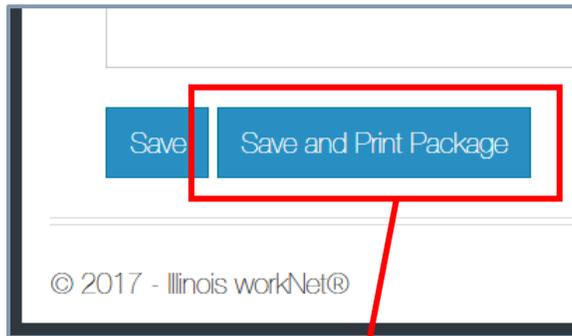
Staffing Month: April 2017
4334 Status: CBO/DHS Completed

Provider Completes Before Staffing | Provider/DHS Completes After Staffing

1. Review ISTEP Summary for accuracy. Update as needed. NOTE: This will open in a new tab. [Review ISTEP Summary](#)
2. Select the 2151A for the staffing month (April 2017)
Added 2151A File:
 - IL444-2151A-1test-5_1_2017.pdf[Select Staffing 2151A](#)
3. If there has been a change in the customer status, select other documents as needed (e.g. 2151, 2846G, 3392, 2151A of conciliation documents)
Added Files:
 - IL444-2846g.pdf
 - IL444-2151A-Adventura-5-15-2016.pdf[Select Other Documents](#)
4. Review case notes. Problem cases should be documented in case notes. NOTE: Case notes from the staffing month will automatically populate the staffing packet. If you have additional comments, please add them in the following section. [View Case Notes](#)
5. Describe progress/level of participant engagement:

Customer attended intake and tested for TABE. We scheduled customer to attend 5 workshops and work with Employment 101. To date customer has averages 20 hours per week since we engaged the customer in activities.

[Save](#) [Save and Print Package](#)



Following the staffing, provide the CBO with:

- a copy of the updated 4333 indicating who will be required to be staffed at the next staffing meeting, and
- a DHS signed 4334 for each customer.

Staffing Follow-up

Following the staffing, return to the staffing report:
Reports > Staffing Report > Select Customer > Click 4334 Status > New Window Opens >

1. **Select** "Provider/DHS Completes After Staffing" tab for the customer.
2. **Select** "Browse" to Upload the signed 4334 for the EPIC customer.
3. **Select** if it is signed by DHS and/or CBO/Provider.
4. **Click** "Save".
5. When uploaded, the file will automatically save to the customer's progress page.
6. A green box appears to indicate the file was saved.
7. If needed, the file can be downloaded from the link following the Step 1 or the Customer's progress page.

Customer Name	DHS Case Id	4334 Status & Staffing Packet	Staffing Packet
A. Smith	0821801123456	CBO/DHS Completed	<input checked="" type="checkbox"/>
J. Brown	9420322322220	Started	<input checked="" type="checkbox"/>
j. bullford	082030117739	Print 2151 Only	<input checked="" type="checkbox"/>
M. Most	0820376459874	Print 2151 Only	<input checked="" type="checkbox"/>

REPORTS

STAFFING REPORT

Back to Staffing Report Customer List
Participant Name: Robert Telgar
Case Number: 0820322QW1444

Staffing Month: May 2017
4334 Status: Started

Provider Completes Before Staffing
Provider/DHS Completes After Staffing

UPLOAD 4334 FORM AFTER STAFFING

Step 1. Upload the completed 4334 form. NOTE: Uploading a new document will replace the current uploaded document. **Browse...** No file selected

Step 2. This form was signed by: DHS CBO/Provider

Step 3. Save this form and signature status: **Save**

Provider Completes Before Staffing
Provider/DHS Completes After Staffing

UPLOAD 4334 FORM AFTER STAFFING

There is a 4334 form uploaded with the name I.444-4334_A_Johnson_2017.pdf on 6/6/2017 by Del... signed by CBO/Provider.

Step 1. Upload the completed 4334 form. NOTE: Uploading a new document will replace the current uploaded document. [Click here to download the already uploaded file.](#) Choose File No file chosen

Step 2. This form was signed by: DHS CBO/Provider

RESOURCES

AGENCIES

CENTRAL STATES SER - HEALTHCARE BRIDGE

Address: 2948 W. 98th Street Chicago, IL 60629
Phone Number: 773-649-0000

Agency Details
Training Programs
Schedule
Uploads

Upload File

Date	File Name	Display
3/2/2017 9:57 AM	office 2010 quick reference.pdf	CBO in

Following the staffing, upload the 4333 with IDHS comments to the Upload Files Section of the agency profile.

DHS Staffing Protocol

1. Upon execution of the Agreement, the FCRC and the Provider will establish a meeting schedule. The Provider will designate a representative to attend the meetings and to resolve issues. For Cook County, meetings should occur at least monthly; for Downstate, the FCRC and the Provider will schedule meetings on an "as needed" basis.
2. At least three (3) workdays prior to the meeting, the Provider will complete and send the FCRC the Employment and Training Participant List (Form 4333). The list will include the name and appropriate information for each participant being served. The Provider will indicate participant status and which individuals are to be fully staffed on the list.
3. The Provider will complete the Change progress report form (2151A) for those participants that are being fully staffed because they are not progressing, including those participants in the job retention period. For all other participants, the Provider completes the Change Progress Report Form (Form 2151A) indicating the actual activities and hours per month in which the individual is participating and their level of progress. The Provider will also report any behavioral or attitudinal changes that demonstrate progression toward securing and retaining employment and/or any changes to the participant's Employability Plan.
4. The Change Progress Report Form (Form 2151A) will be attached to the Employment and Training Participant List (Form 4333) for each participant who is listed but who will not be fully staffed. The List and its attachments will be sent to the FCRC.
5. At the meeting, the Provider will bring copies of Forms 2151A along with any revised Employability Plan forms and **case notes as requested by the FCRC**.
6. The FCRC staff will verify and indicate the case status and participants' eligibility for continued participation with the Provider on the Employment and Training Participant List (Form 4333). If possible, discrepancies in lists will be resolved before the staffing meeting.
7. A copy of staffing documents must be kept at the FCRC and a copy in the participant's case file at the Provider's site.

Full Staffing

The FCRC and the Provider will conduct a full staffing for each participant who is having problems or is not progressing.

Other selection criteria for a full staffing may include:

- poor level of participant engagement;
- length of time participating in program;
- participant's receiving third party services such as counseling/prevention services; and
- other identified problems.

The FCRC Representative, the Provider representative and other interested parties work as a team to get the participant back on track. Other interested parties may be third party counseling/prevention service providers or other professionals involved in the participant's plan. The FCRC and the Provider will bring case files and other relevant background information to the full staffing meeting.

Review the participant's situation:

- Review all resources available to the participant;
- Review the participant's family situation;
- Discuss appropriateness of current activity(ies);

- Discuss new strategies to improve participation; and
- Share information, which may be unknown to other party(ies).

The full staffing may result in a revision of the Assessment Employability Plan by either the FCRC or Provider in conjunction with the participant. Revision of the Assessment Employability Plan requires the FCRC or Provider to schedule a follow up meeting with the participant. The follow up meeting may include other parties.