What is the EPIC Intake dashboard? The intake dashboard provides real-time data showing where customers are in the intake/eligibility process from the time they are scheduled for EPIC orientation all the way up to their Random Assignment. It includes pass/loss rate data for section/components of the program. Partners can use the data in the dashboard to access filtered lists of customers for easy access to customer program information.

Who can use the dashboard? Only staff that have been given access to the program can view the dashboard. Access to customer information is restricted even further through the use of roles.

- **DHS and Commerce Admin Roles-** Statewide staff see statewide info and use a dropdown menu to see specific regional information.
- **Career Planner/Case Worker Role-** Staff can see counts for their region/office that provides easy access to customer information. They can select result links to get filtered lists of customers that meet the criteria for that section of the dashboard. From that point, they can access detailed customer information.
- **CBO Partner Roles-** They can see the dashboard for their region, but they cannot use the links to access customer information. Staff with a partner role is given access to customer information through the team's tools; from there they can access customers from their customer list.

How are the dashboards organized?
Section/Definitions Column: Includes sections/components of the program (intake, eligibility, and group assignment)**.**

The 🛈 icon provides a definition for the item in the section. Color-coding is used to identity customers who need action (or are in-process), successfully completed, or did not complete (withdrew). The definitions are listed in the sample below.

Section and Defintions	Count	%	Loss Rate	Pass Rate	Completed Service	%
1. Topic						
White Color Code = FYI only. No action is needed. These numbers are not included in the loss/pass rates. 🛈	2	20%				
Yellow Color Code = Action is needed. These numbers are not included in the loss/pass rates. 🛈	2	20%				
Green Color Code = This step is complete or meets a program requirement. 🛈	4	40%		67%		
Red Color Code = This person is either not able to participate or quit participating in the program. 🛈	2	20%	33%			
Total	**10**					

> Customers in the white & yellow lines are not included when calculating the pass/loss rate columns.

Count column: These links provide access to individual customer information; the column count links are available for Super User and Career Planner/Case Worker roles.

Intake step	Definition	Count	%	Loss rate	Pass rate
Orientation					
Scheduled for Orientation	# of individuals scheduled to attend an individual or group orientation about the EPIC Pilot Program	99	%		
Scheduled for Follow-Up to Complete Orientation	# of individuals scheduled to attend an individual or group orientation about the EPIC Pilot Program and has been set under the Intake Activities section 1.3 as 'Scheduled for follow-up to complete orientation process'	99	%		
Missed Orientation	# of individuals scheduled to attend an individual or group orientation about the EPIC Pilot Program, but they did not start the application or did not attend orientation	99	%		
Attended: Going to Apply	# of individuals who attended individual or group orientation meeting about EPIC Pilot Program and started an application	99	%		98%
Attended: Not Going to Apply	# of individuals who attended orientation and chose not to apply	99	%	1%	
Declined To Participate	# of individuals who declined to participate before completing the application	99	%	1%	
Total	Total number of customers invited to Orientation	99			
Application					
Application Not Started	# of individuals who intended to apply but have not started an online application	99	%		
Incomplete Application Within 24 Hours	# of individuals who started, but did not submit, an online application within the last 24 hours	99	%		
Incomplete Application Older than 24 Hours	# of individuals who started, but did not submit, an online application more than 24 hours ago	99	%		
Customer Profile Information Needs Finished	# of individuals who have a complete application but need to have their profile information finished before the review team can make a recommendation	99	%		
Eligible: Complete Application	# of individuals who submitted an online application	99	%		99%
Declined to Participate	# of individuals who indicated they do not want to participate within their submitted application	99	%	1%	
Total	Total Customers in Application Process	99			
NOCTI Assessment	*NOCTI is no longer required, but previous results can be viewed by clicking title – this section is "collapsed" on the dashboard.*				
NOCTI Not Started	# of individuals who are eligible after completing the application and are required to complete the NOCTI, but they have not started the assessment	99	%		
Completed NOCTI	# of individuals who completed NOCTI	99	%		
ESL - NOCTI Not Required	# of individuals who are not required to complete the NOCTI. This was indicated in the customers Intake Activities section. These individuals will be put into a Bridge program because of ESL needs.	99	%		
Total	Total Customers in NOCTI Process	99			
Eligibility Review					
Ready for Review by DHS Case Worker	Customers who are ready for DHS Case Worker Review	99	%		

Referral Recommended	# of individuals who pass the team review	99	%		98%
Referral Not Recommended	# of individuals who are not eligible	99	%	1%	
DHS Indicated Customer NOT Currently SNAP Eligible	# of individuals who were identified as not SNAP Eligible during Eligibility Review	99	%	1%	
Declined to Participate	# of individuals who declined to participate during Eligibility Review	99	%	1%	
Total	Total Customers in Eligibility Review	99			
Consent					
Scheduled for Consent	# of individuals who are scheduled for follow assignment consent, and group assignment recommended for participation in the EPIC P	99	%		
Need to be Scheduled for Consent	# of individuals who need to be scheduled for assignment consent, and group assignment the EPIC Pilot Program	99	%		
Complete Consent & Random Assignment	# of individuals who completed (i.e. sign) ran consent form to participate in the EPIC Pilot assigned to EPIC SNAP E&T Services grou services group	99	%		99%
Declined to Participate	# of individuals who started the consent proc participation in the EPIC Pilot Program and c consent form. This information is populated system.	99	%	1%	
Total	Total Customers in Consent Process	99			
Random Assignment					
EPIC SNAP E&T Service	# of individuals randomly assigned to the EPIC SNAP E&T Service group. This assignment is populated by the EPIS system.	99	%		50%
Traditional SNAP E&T Service	# of individuals randomly assigned to the Traditional SNAP E&T Service group. This assignment is populated by the EPIS system.	99	%	40%	
Community-Only Service	# of individuals randomly assigned to the Community-Only Service group. This assignment is populated by the EPIS system.	99	%	10%	
Total	Total Customers in Random Assignment	99			
CBO Assignment					
Assigned to CBO	# of individuals that have been randomly assigned to the EPIC Services group and assigned to a CBO	99	%		100%
Not Assigned to CBO	# of individuals that have been randomly assigned to the EPIC Services group and still need to be assigned to a CBO	99	%	0%	
Total	Total Customers Ready for CBO Assignment	99			

> The consent sections are no longer required. Once those customers have completed the consent process we can remove those line items.

The numbers listed under the count column provide links to access individual customer information.

- Select the blue profile button next to a customer to access individual customer information.
- Select the export button to download a list of customers to a spreadsheet that includes contact information, orientation status, application status, and more.

CUSTOMERS - SEARCH

CUSTOMERS | DHS INVITE

🔍 CUSTOMER SEARCH

Name	
Region	Region 4 ⌄
Office	Select Office ⌄
Assigned CBO Agency	Select ⌄
DHS Case ID / SNAP Unit ID	
Other Participant / Worknet Id	

Other Customer Identifiers ▲

Advance Search ▲

Search | Export ❶

Show 50 ⌄ entries

Last Name	First Name	Region	Office	CBO Agency	Customer Information
At	A	4	FCRC - 1550 4th Street Lincoln	Homework Hangout Club, Inc.	Profile - Progress - Plan