

CBO TA Webinar 3.15.17

Agenda

- Dashboard
 - The following areas in the Enrolled Dashboard need to be cleaned up and monitored by CBO staff:
 - Referral Pending – 2151 Past Due: 13
 - Region 1 – 7
 - Referral Accepted & Enrollment Started - Enrollment Required – 20
 - Region 1 – 20
 - CBO Needs to Upload – Past Due – 66
 - Region 1 – 32
 - Region 2 – 1
 - Region 3 – 32
 - Region 4 – 1
 - Exited Status - Completion Documentation Needs Uploaded – 20
 - Region 1 – 14
 - Region 2 – 6
- Upcoming Update
 - We will be removing customers who are not marked as enrolled from the ISTEP dashboard. You will only do an ISTEP with customers enrolled to your location.
 - 3085 Employment Verification form can be used to get proof of employment from employer if you do not have your own internal form. You can find this form on the restricted resources page.
<http://www.dhs.state.il.us/onenetlibrary/12/documents/Forms/IL444-3085.pdf>
- Exiting Customer
 - Step by step demonstration of using the EPIC system to exit the customer & uploading the required documentation.
- Poll Questions & Correct Answers
 - What do you do if you have a customer who has to leave town for a few weeks to care for a family member?
 - Determine how long the customer will be gone and the reason why.
 - Schedule a follow up meeting when they come back.

- Notify DHS of the situation by leaving a case note in the customer's profile.
 - How far in advance should you schedule intake appointments?
 - 2 Months or more
 - How do you contact DHS with any questions you have about customers?
 - Leave a case note and send it via workNet message and email.
 - Use the Primary DHS contact sheet found on the restricted resources page.
 - What do you do if a customer is a No Show for their first appointment with you?
 - Attempt to contact them to reschedule and document my efforts in the case notes.
 - Upload the 2151 with "No Contact".
- Staffing
 - When completing the staffing forms you will be completing them with the customers progress/engagement for the previous month
 - The staffing schedule for the April, May, & June staffings are available on the partner page and below:
 - April:
[https://www.illinoisworknet.com/partners/EPIC/Documents/APRIL%20STAFFING S.pdf](https://www.illinoisworknet.com/partners/EPIC/Documents/APRIL%20STAFFING%20S.pdf)
 - May:
[https://www.illinoisworknet.com/partners/EPIC/Documents/MAY%20STAFFINGS .pdf](https://www.illinoisworknet.com/partners/EPIC/Documents/MAY%20STAFFINGS.pdf)
 - June:
[https://www.illinoisworknet.com/partners/EPIC/Documents/JUNE%20STAFFING S.pdf](https://www.illinoisworknet.com/partners/EPIC/Documents/JUNE%20STAFFING%20S.pdf)