

epic | DASHBOARDS | CUSTOMERS | HI, INFO@TRAIN17\_SIUCCWD.COM

**BLUE BLACK**

PROFILE | PROGRESS PAGE | ISTEP | SERVICES/OUTCOMES | CASE NOTES | ASSESSMENTS | OPTIMAL RESUME

### PROGRESS PAGE

**CASE NOTES(5)**

Training provider/agency staff use the Progress page to track and communicate customer status and progress to the IDHS office. This includes:

- Agency Primary Contacts for the Customer
- Enrollment Documentation \*
- Monthly Updates and Changes in Activity \*

\* These items populate the Enrolled Customer Dashboard.

Related Instructions:

- Progress Page (PDF)
- Enrolled Customer Dashboard (PDF)

**ELIGIBILITY STATUS: SNAP ELIGIBLE & NOT RECEIVING TANF BENEFITS** [Update SNAP Eligibility Status](#)

**Contact Information**

**DHS Contact**

DHS Office Information:  
Cook County Mid South 1642 W. 59th Street 1st Floor Chicago, IL 60636  
**Local Office: Roseland**

DHS Contact \*  
DHSscaseworker Team1

[Update](#)

**CBO Contact**

CBO Agency Information:  
A Safe Haven 2750 W. Roosevelt Rd. Chicago 60608

CBO Contact \*  
Tammy Tester

[Update](#)

**Initial CBO Appointment - 2151 Upload**

1. Download the 2151 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 2151 form to your computer and then upload the document.

[Upload Completed 2151 Form After Initial Appointment](#) [Upload 2151 Form](#)

Date	Referral Status	File Name	Note	Uploaded
No files have been uploaded				

**Schedule CBO Appointment**

**Location / Name:** Intake Orientation

**Notes:** This is the site for the initial intake orientation. This is not where training will take place. We will discuss details for your specific process moving forward. Customer needs to bring ID, Social security card and resume.

**Date:** 7/31/2017

**Time:** 1:30 PM - 2:30 PM

[Remove Appointment](#)

**Training Program Enrollment**

Identify the training program assignment for this person. The actual start/completion dates and current status will be displayed in the Individualized Services, Training, and Employment Plan (ISTEP).

**Requirement Prior to Enrollment:** Upload a 2151 form with either Client Assessment or Client Service Initiated.

**Completion Information**

Upload a 2151A and related required documentation to close out the completion status.

Completion Status \*  
In Progress

Completion Reason \*  
Select

Completion Date  
[Calendar Icon]

[Update](#)

Item Needed - Update Customer's Exit Information Above  
Item Needed - Upload a 2151A Form (Marked as Completed) in the Change in Activity/Monthly Update section below

**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-5th of each month.  
2. Changes in activity 2151A can be uploaded at anytime.

[Upload 2151A Form](#) [Upload Other Documents](#)

**Download IL444-2151A**

Notice	Date	Progress	File Name
No files have been uploaded			

Resources on [www.illinoisworknet.com/epicpartners](http://www.illinoisworknet.com/epicpartners) that accompany this document include:

- Completing a 2151A
- Completing a 3085
- Conciliation Process
- Customer Completion Status Instructions
- Enrolled Customer Progress Page
- Initial Customer Intake Worksheet
- Intake Process
- Rejected Referral

Add the primary contact as soon as the customer is assigned to your office.

Within 48 hours of the initial appointment, download a 2151 to mark with one of four answers.

- Client Service Initiated
- Client Assessment Complete
- Referral Rejected
- No Contact from Client

If assessment process is the same day, upload 2151 indicating "Client Service Initiated" with anticipated service date.

If customer is a "No Show," only remove the appointment if you reschedule before the end of the 48 hours. A 2151 is not necessary if customer is rescheduled until after the rescheduled appointment.

Customer cannot be enrolled unless 2151 is uploaded with a status of:

- Customer Assessment Completed (and/or)
- Customer Service Initiated

Customer should be enrolled or rejected within 5 business days of initial appointment.

Used if customer is complete. Use "Did Not Complete" and "Dropped from Program" for Exempt customers who elect not to participate.

Download 2151A to create initial plan when you enroll the customer. Upload and mark as Customer Plan in description. The plan includes all anticipated activity.

Monthly between the 1<sup>st</sup> and 5<sup>th</sup> of each month upload a progress update on a 2151A for the previous month.

PROFILE | **PROGRESS PAGE** | ISTEP | SERVICES/OUTCOMES | CASE NOTES | ASSESSMENTS | OPTIMAL RESUME

## PROGRESS PAGE

**CASE NOTES(18)**

**Profile**

First Name Blue

Last Name Black

Email [Show More Contact Information](#)

User Name BBlack

Other Participant ID 9276

DHS Case ID/SNAP Unit ID 6523698710111

RIN 652369787

Application Submitted 12/12/2016

Eligibility Review Recommended

Assignment EPIC SNAP E&T Services on 12/12/2016

Study ID 1000

CBO Agency Assignment A Safe Haven

Enrollment Status Enrolled

Customer Type Mandatory

Category 2

ISTEP Model 2

[Reset Password](#)

Training provider/agency staff use the Progress page to track and communicate customer status and progress to the IDHS office. This includes:

- Agency Primary Contacts for the Customer
- Enrollment Documentation \*
- Monthly Updates and Changes in Activity \*

\* These items populate the Enrolled Customer Dashboard.

Related Instructions:

- Progress Page (PDF)
- Enrolled Customer Dashboard (PDF)

**ELIGIBILITY STATUS: SNAP ELIGIBLE & NOT RECEIVING TANF BENEFITS** [Update SNAP Eligibility Status](#)

Contact Information

IL444-2151-Black-8-4-2017.pdf file uploaded successfully

**Initial CBO Appointment - 2151 Upload**

- Download the 2151 form and update the document in Adobe Reader. If you need to download Adobe Reader, go to <http://get.adobe.com/reader/>
- Save the updated 2151 form to your computer and then upload the document.

[Upload Completed 2151 Form After Initial Appointment](#) [Upload Scanned 2151 As Needed](#)

[Download 2151 Form](#)

Date	Referral Status	File Name	Note	Uploaded By	Remove
8/4/2017 8:41 AM	Services Initiated	IL444-2151-Black-8-4-2017.pdf	Finished assessment and will enroll	WPP Train17	<a href="#">Remove</a>
8/3/2017 4:31 PM	Assessment Completed	IL444-2151-Black-8-3-2017.pdf	Customer attended initial appointment	WPP Train17	<a href="#">Remove</a>

**Schedule CBO Appointment**

Location / Name: Intake Orientation

Notes: This is the site for the initial intake orientation. This is not where training will take place. We will discuss with you at the orientation details for your specific process moving forward. Customer needs to bring ID, Social security card and resume if applicable.

Date: 8/3/2017

Time: 5:00 PM - 6:00 PM

**Training Program Enrollment**

Identify the training program assignment for this person. The actual start/completion dates and current status will be determined by the Individualized Services, Training, and Employment Plan (ISTEP).

Enrollment Date: 8/3/2017

CBO Enrollment Status \*  
Enrolled

Program Assignment \*  
Welding (Initial Assignment)

[Update](#)

**Completion Information**

**Change in Activity / Monthly Update - 2151A Upload**

- 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/>
- Save the updated 2151A form to your computer and then upload the document.
  - The monthly update 2151A form must be uploaded between the 1st-5th of each month.
  - Changes in activity 2151A can be uploaded at anytime.

[Upload 2151A Form](#) [Upload Other Documents](#)

[Download IL444-2151A](#)

Notice	Date	Progress	File Name	Note	Uploaded By	Remove
	8/4/2017 9:39 AM		IL444-3085 Blue Black.pdf	signed employment verification release form	WPP Train17	<a href="#">Remove</a>
	8/4/2017 9:35 AM	Acceptable Progress	IL444-2151A-Black-8-4-2017.pdf	Initial plan	WPP Train17	<a href="#">Remove</a>

Assessments completed at a later time but within 5 business days of Intake Orientation should be marked as **"Services Initiated."**

**Referral Rejected** should be uploaded within 5 business days of initial orientation.

Initial document uploaded within 48-hours of Intake Orientation. Marked as **"Services Initiated"** OR **"Assessment Completed."**

Upload document reflecting **"No Contact"** customers within 48-hours of initial orientation.

The clock starts based on the Intake Orientation Appointment date.

The enrollment date must be within 5 business days of Intake Orientation Appointment date. Case notes reflect actual enrollment date.

After the assessment is complete, enroll the customer into the appropriate program within 5 business days of the initial appointment.

The enrollment opens the customer ISTEP.

Upload a signed 3085 Employment Verification form or similar document. You may also upload any assessment documents you gathered about the customer.

Upload a 2151A with the customer's initial plan after the customer has been enrolled.

Use the information in the 2151A plan to create steps in the ISTEP.



At least one ISTEP step should be marked as "Open" within 5 business days of customer enrollment to demonstrate customer activity engagement.

Monthly status updates are required between the 1<sup>st</sup> and the 5<sup>th</sup> of each month for all customers who require staffing. Those marked during the month as ineligible by DHS still require a status update. (These customers require a staffing.)

During the 90-day employment retention period, status updates are required. These documents are part of the staffing packet.

**Examples of real uploads:**

If a customer has had several activities occur it would look like this:

Upload 2151A Form		Upload Other Documents				
Download IL 444-2151A						
Notice	Date	Progress	File Name	Note	Uploaded By	Remove
	8/2/2017 11:31 AM	Completed	IL 444-2151A-8_2_2017.pdf	July 2017 Progress Report - Unsuccessful completion	Nancy Brown	<a href="#">✕ Remove</a>
	7/14/2017 3:34 PM	Completed	IL 444-2151A-7_14_2017.pdf	Client Sanctioned 07/11/17	Nancy Brown	<a href="#">✕ Remove</a>
	7/14/2017 3:31 PM		IL 444-2846g-7_14_2017.pdf	Request for Conciliation for June 8, 2017	Nancy Brown	<a href="#">✕ Remove</a>
	7/14/2017 2:28 PM		4334 June17_2017.pdf		Nancy Brown	
	7/5/2017 6:17 PM	Conciliation, Recommend Sanctions	IL 444-2151A-7_5_2017.pdf	June 2017 Progress Report - waiting for sanctions	Nancy Brown	<a href="#">✕ Remove</a>
	6/15/2017 1:47 PM		2017-06-15.pdf		Nancy Brown	
	6/12/2017 5:55 PM	Non-Cooperation, Recommend Sanctions	IL 444-2151A-6_12_2017.pdf	Missed conciliation appointment	Nancy Brown	<a href="#">✕ Remove</a>
	6/6/2017 4:36 PM	Minimal Progress	IL 444-2151A-6_6_2017.pdf	May Progress Report - Minimal Progress	Nancy Brown	<a href="#">✕ Remove</a>
	5/30/2017 4:24 PM	Conciliation	IL 444-2151A-5_30_2017.pdf	Conciliation requested	Nancy Brown	<a href="#">✕ Remove</a>
	5/30/2017 4:23 PM		IL 444-2846g-5_30_2017.pdf	Conciliation meeting for June 8, 2017	Nancy Brown	<a href="#">✕ Remove</a>
	5/26/2017 4:12 PM	Minimal Progress	IL 444-2151A-5_26_2017.pdf	Client has minimal progress	Nancy Brown	<a href="#">✕ Remove</a>

- Customer completed as SNAP Ineligible status update.
- Customer sanctioned status update.
- Customer rescheduled for conciliation appointment.
- Staffing follow-up automatic upload.
- Customer status update, while waiting for DHS action.
- Customer automatic upload from staffing packet.
- Customer missed conciliation appointment.
- Customer monthly status update.
- Conciliation status update.
- Conciliation appointment scheduled.
- Minimal Progress Status Update.

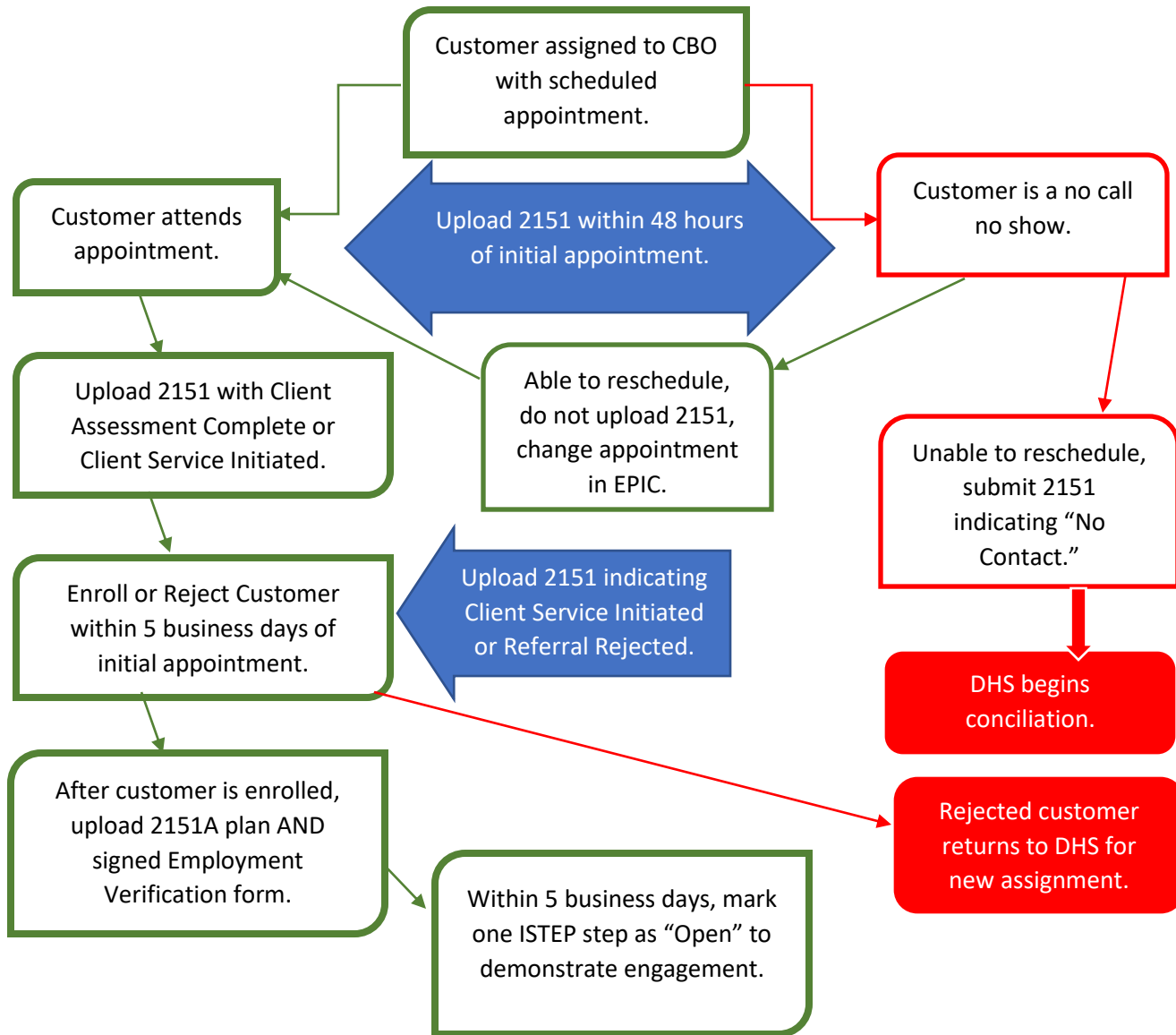
Upload 2151A Form		Upload Other Documents				
Download IL 444-2151A						
Notice	Date	Progress	File Name	Note	Uploaded By	Remove
	8/3/2017 1:42 PM	Acceptable Progress	IL 444-2151A-8-3-2017.pdf	Customer attending AB3/Bridge since 7/24/2017	Frank Wallace	<a href="#">✕ Remove</a>
	7/17/2017 11:43 AM		3392 Conciliation agreement.pdf	Conciliation agreement	Frank Wallace	<a href="#">✕ Remove</a>
	7/5/2017 11:30 AM	Conciliation	IL 444-2151A-7-5-2017.pdf	Conciliation appointment has been sent to customer for 7/17/2017	Frank Wallace	<a href="#">✕ Remove</a>
	7/5/2017 11:28 AM		2846-G.pdf	Conciliation appointment has been sent to customer for 7/17/2017	Frank Wallace	<a href="#">✕ Remove</a>
	6/15/2017 3:21 PM	Acceptable Progress	IL 444-2151A-6-15-2017.pdf	Acceptable Progress	Frank Wallace	<a href="#">✕ Remove</a>
	6/7/2017 10:29 AM	Non-Cooperation	IL 444-2151A-6-7-2017.pdf	Customer failed to complete Job Readiness Class and is currently in non-compliance with program. Case Manager will set conciliation appointment.	Frank Wallace	<a href="#">✕ Remove</a>

- Customer positive status update.
- Customer 3392 conciliation agreement.
- Customer status update to Conciliation.
- Customer scheduled for conciliation appointment.
- Customer contacted CBO mid-month status update.
- Customer status update of Non-Cooperation.



**The Flow**

Refer also to the CBO – Intake Flow Chart (Mandatory Participant PDF) on the EPIC Partner Resources page.



The purpose is to identify how specific IDHS required forms are being utilized in the EPIC program, as well as identify if any other documentation is being used in place of a specific IDHS form. These documents are used to track customer progress as well as facilitate communication between DHS and the CBOs. Each form listed contains a description of the action IDHS and CBO staff must take to sufficiently utilize and complete the form or its supplement.

Form Number & Title	IDHS Action in EPIC	CBO Action in EPIC	Policy Requirement
2151 - Referral Form	IDHS assigns the customer to a CBO which auto populates the 2151. This form is available on the customer's Profile - Assignment page. IDHS provides the customer with a printed completed 2151 at the end of the orientation/intake.	The CBO downloads the 2151 form from the customer's EPIC Progress page. The form is completed and uploaded back into the customer's Progress page within 48-hours of the customer's initial appointment. This notifies IDHS of the customer's status (assessments complete, services initiated, no contact, referral rejected). The system reads the form and populates the dashboard based on which option is checked. It is accessible by both IDHS and CBO staff.	Required by IDHS policy.
2151A - Change Progress Report Form	IDHS reviews uploaded 2151A to review both planned activities and actual activities. This form is available on the customer's EPIC Progress page.	<p>The CBO downloads the 2151A form from the customer's EPIC Progress page. When the form is completed, it is uploaded back into the customer's Progress page. After the system reads the form, it populates the dashboard based on which option is checked. It is accessible by both IDHS and CBO staff.</p> <p>There are two ways to use the 2151A form to document activities:</p> <p><b>Planned Activity Use</b> Within 48-hours of initiating services, CBOs complete an initial plan with the customer.</p> <p><b>Actual Activity Use</b></p> <ul style="list-style-type: none"> <li>• CBO completes at least one 2151A between the first and fifth of each month reflecting the customer's engagement. This notifies IDHS of any changes to the customer's plan/Progress, when the customer has completed the training program or to recommend sanction.</li> <li>• CBO will use the completed 2151A for the monthly Progress for staffings.</li> </ul>	Required by IDHS policy.
2839 – Employability plan	IDHS action not required.	The ISTEP acts as the employability plan for EPIC. Once enrolled the customer will receive a printed copy of their ISTEP upon the receipt of service and any time a change is made. Included with this printer friendly (button) view are instructions on how the customer can access their ISTEP in the online EPIC system. Any time an ISTEP is printed using the button, a case note is added to the customer's profile along with sending a notification with a link for accessing a customer view of their ISTEP online.	Agreed upon process between IDHS and Commerce.  EPIC Procedures

Form Number & Title	IDHS Action in EPIC	CBO Action in EPIC	Policy Requirement
2846g - Conciliation Appointment Notice	IDHS action not required.	CBOs complete the Conciliation Appointment Notice to schedule customers to meet if they become non-compliant. CBOs upload this document into the Progress page, along with mailing the customer a copy.	IDHS Policy.
3085 – IDHS Contract Report – Notification of Employment Retention	IDHS action not required.	Upon enrollment, CBOs will go over Employment Verification form with the customer. The customer is provided the option to sign the form. If the customer chooses not to sign it, there will be no repercussions. The signed/unsigned form is uploaded to the customer’s Progress page and will include a case note if not signed.	IDHS policy.  Signed forms allow CBO to contact employer for employment information.
3392 – Conciliation Agreement	IDHS action not required.	If the customer comes in for their compliance meeting, CBOs complete the Conciliation Agreement form stating the requirements they must meet in order to continue participation. Both parties must sign this agreement. CBOs upload the signed document into the Progress page.	IDHS Policy.
4001a – Family Assessment	The Family Assessment form needs to be completed prior to the customers being referred to the EPIC program to determine if they are a good fit to participate.	CBO action not required.	Agreed upon process between IDHS and Commerce.
4333 - Employment and Training Participants List	Complete participant status for local office and identify if staffing is needed.	After completing the staffing packet for each customer, the online EPIC system will auto-populate the 4333. The form will include customers identified to be staffed for each local IDHS office. This form is saved in the online EPIC system with the staffing packets and is accessible to IDHS and CBO staff. CBOs make the 4333 available to the appropriate IDHS contact three days prior to staffing.	IDHS Policy.
4334 - Employment and Training Staffing	Complete section B: PARTICIPANT PLAN STATUS CHANGES, C: CASE STATUS, and sign as needed.	Each month, the CBO completes a staffing packet which includes this form for each customer in the online EPIC system. Staffing packet is available in the reports area and saved in the online EPIC system. It contains the 4334 form and is auto-populated based on the customer’s ISTEP and 2151A. Both IDHS and CBO staff can access the packet.	IDHS Policy.
4538 - SNAP Employment and Training Program Pamphlet	At Orientation, IDHS provides the 4538 pamphlet. IDHS assigns the customer to the EPIC Services group. Additionally, a letter, going over the Sanction for Not Complying section, is available on the assignment tab. IDHS staff prints off and provides a copy to the customer.	CBO enrolls the customer and a link to the 4538 pamphlet is sent as an email and Illinois workNet message to the customer.	Agreed upon process between IDHS and Commerce.
4728 – Learning Needs Assessment	The Learning Needs Assessment form is completed as part of the Family Assessment prior to the customers being referred to the EPIC program to determine if they are a good fit to participate.	CBO action not required.	Agreed upon process between IDHS and Commerce.