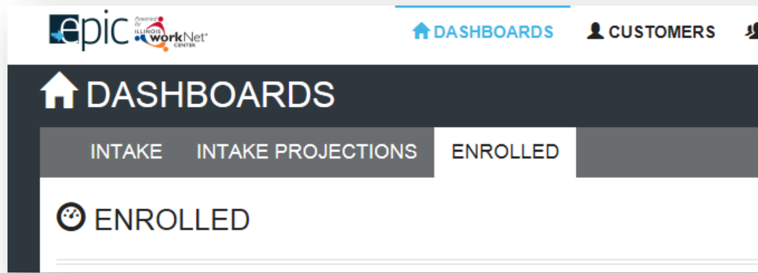
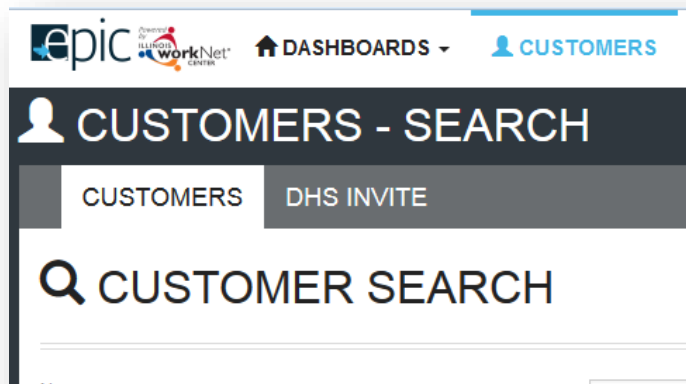
Access the Enrolled Customer Progress Page

There are two ways to access an Enrolled Customer's **Progress Page**.



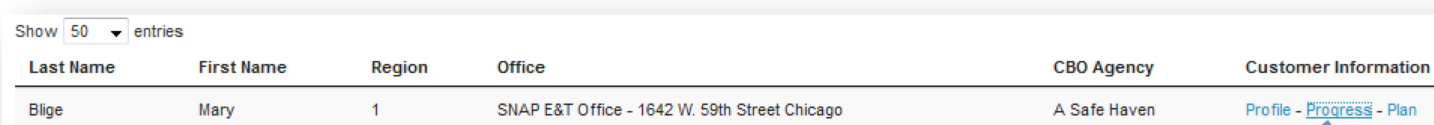
Option 1 – Dashboards

1. **Select** Dashboards at the top of the page, and then **select** the Enrolled tab to view that dashboard.
2. **Click** the number associated with that line.
3. A list will show the participants associated with that specific selection. **Select** the Progress option.

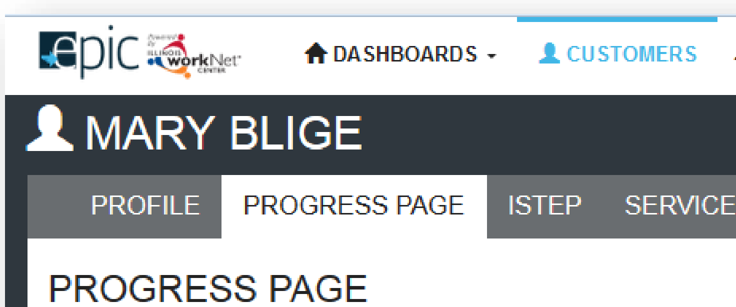


Option 2 – Search Customer

1. **Select** the Customers tab to begin a customer search. **Enter** participant's name or other search parameters.
2. **Click** Search. A List appears with matching results.
3. **Select** Progress to go directly to the participant's **Progress Page**. Once you're on the participant's profile, you can easily move from their profile to **Progress Page**, then to plan, services or outcomes.


Show 50 entries

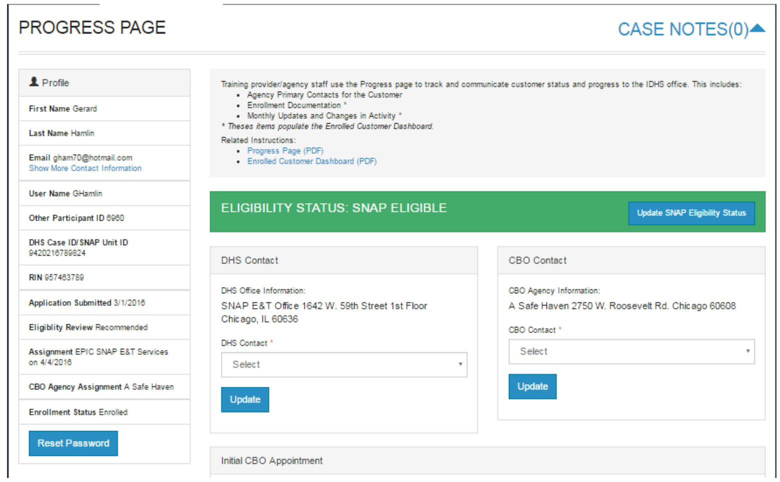
Last Name	First Name	Region	Office	CBO Agency	Customer Information
Blige	Mary	1	SNAP E&T Office - 1642 W. 59th Street Chicago	A Safe Haven	Profile - Progress - Plan



Update the Progress Page

The **Progress Page** is where the CBO tracks the progress of the participant and initiates the transmittal of forms to the IDHS office.

Identify Customer's Eligibility

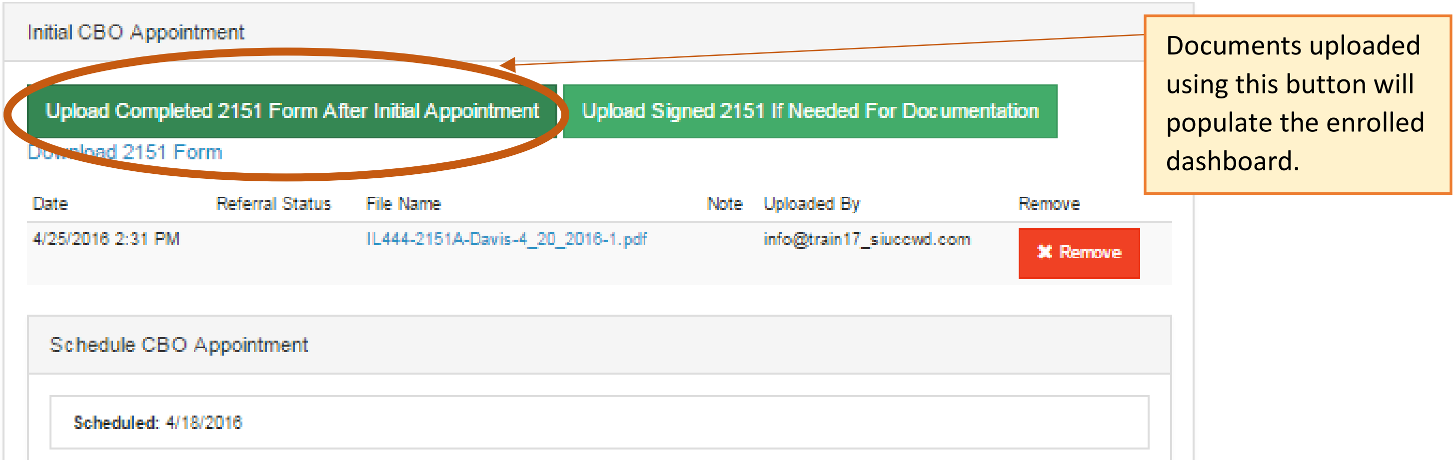


- IDHS staff **update** the customer's Eligiblity Status throughout their enrollment in EPIC to ensure that the customer is eligible for participation.
- CBO staff can quickly **view** the status of the customer on their **Progress Page**. Customers can only be engaged if they are SNAP Eligible or Exempt.
- Possible Eligiblity Statuses include:
  - SNAP Eligible and Not Receiving TANF Benefits
  - SNAP Eligible and Exempt Not Receiving TANF Benefits
  - SNAP Ineligible - *Reason for Completion is Did Not Complete – Not SNAP Eligible.*
  - TANF Recipient Not EPIC Eligible
  - SNAP Eligible & Being Re-engaged
  - SNAP Eligible, No longer EPIC eligible due to moving to traditional SNAP Program – *this option requires a case note from IDHS explaining why. Reason for Completion is Did Not Complete – Dropped from Program.*
  - SNAP Eligible, Exempt, and No Longer Wants to Participate - *this option requires a case note from IDHS explaining why. Reason for Completion is Did Not Complete – Dropped from Program.*

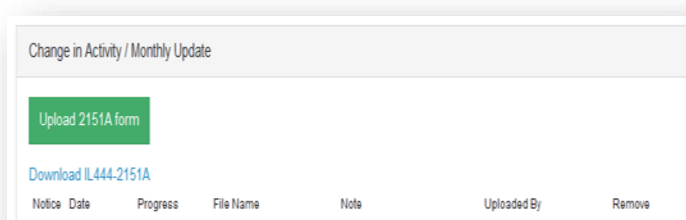
Identify Primary Contacts

- IDHS staff can identify the primary IDHS Contact for the customer.
- CBO staff can identify the primary CBO Contact for the customer. CBO primary contacts are established by program. If a primary contact needs to be changed for a particular customer, it can be done on this page.

Initial CBO Appointment



1. IDHS will set an appointment with the EPIC customer when they assign them to a CBO. The CBO staff (primary contact for program) will receive a notice.
    a. If no appointments are available, IDHS will call CBO to arrange an appointment.
    b. If they cannot reach the CBO while the customer is in the office, they can assign the customer to the CBO without the appointment date/time. The Enrolled dashboard section CBO Enrollment Verification Status will have these customers in **Referral Pending – Appointment has not been Scheduled**.
        i. The CBO will reach out to the customer to schedule the appointment. If they cannot reach the customer, the CBO will use the **Progress Page** to schedule an appointment ten days in advance and print the 2151 form.
        ii. The CBO will mail the 2151 form to the customer and document their attempt(s) in the Case Notes. IDHS primary contact should be copied on the case note as a message/email.
2. Customer attends scheduled appointment. Complete 2151 form, upload to **Progress Page** within 48 hours of appointment.
    a. If the customer is only completing assessments to determine if they will be enrolled during their initial appointment, upload a 2151 with "Assessments Completed."
    b. Once it is determined the customer will be enrolled, upload a 2151 with "Services Initiated". *(This can be done during their initial appointment or follow-up appointment)* Once a CBO has uploaded a 2151 with "Services Initiated" the CBO will:
        i. Enroll the customer and select the customer's training program on the **Progress Page**.
        ii. Complete and upload a 2151A form with the customer's initial plan.
        iii. Add steps to the customer's ISTEP.
        iv. Go to the customer's ISTEP > Career Planning Tab > Review Information and add in the customer's Target Occupation and Goals.



3. Between the 1st and 5th of each following month, upload a 2151A with activities from the month that just ended.

   a. During the month, if there are any changes in engagement, activity or hours, complete and upload an **amended** 2151A.
   b. If required (or as needed), submit a 4333 and 4334 form for monthly staffng on customers.

Customer DOES NOT Attend Initially Scheduled Appointment

For voluntary areas, this step will repeat until customer elects to leave the study or attends an initial appointment.

1. Upload the 2151 within 48 hours of missed appointment. Mark No Contact from Client. This will trigger a case note to the IDHS primary contact to initiate a concilation appointment.
2. Document in Case Notes any communication that may have taken place with the customer.
3. Contact the customer to reschedule the appointment.
4. If successful in rescheduling, remove the original appointment from the **Progress Page** Schedule CBO Appointment section.
5. Enter the rescheduled date on the **Progress Page** Scheduled CBO Appointment section. This will modify the 2151.
6. Download and print revised 2151.
7. Mail revised 2151 with new appointment allowing five days for mail and five days for mail return.

Customer Attends Rescheduled Appointment

1. Complete 2151 form, upload to **Progress Page** within 48 hours of appointment.
2. After CBO has uploaded a 2151 with “Services Initiated”:
   a. Enroll the customer and select the customer’s training program on the **Progress Page**.
   b. Complete and upload a 2151A form with the customer’s initial plan.
   c. Add steps to the customer’s ISTEP.
   d. Go to the customer’s ISTEP > Career Planning Tab > Review Information and add in the customer Target Occupation and Goals.
3. Between the 1^{st} and 5^{th} of <u>each</u> following month, upload a 2151A with activities from the month that just ended.
   a. During the month, if there are any changes in activity or hours, complete and upload an amended 2151A.
   b. If required (or as needed), submit a 4333 and 4334 form for monthly staffing on customers.

Customer DOES NOT Attend Rescheduled Appointment
For voluntary areas, this step will repeat until customer elects to leave the study or attends an initial appointment.

1. Upload the 2151 within 48 hours of missed appointment. Mark No Contact from Client. This will recommend a conciliation.
2. Document in Case Notes any communication with customer.
3. Remove the original appointment from the **Progress Page** Schedule CBO Appointment section.
4. Enter the rescheduled date on **Progress Page** for Scheduled CBO Appointment Date. This will modify the 2151.
5. Download and print revised 2151.
6. Mail revised 2151 with new appointment allowing five days for mail.

Customer Attends An Unscheduled Time

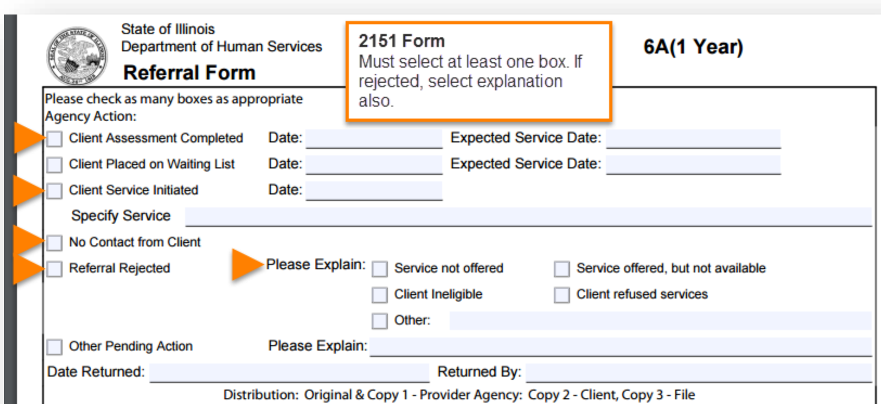
1. Option 1 –
    a. Reschedule appointment to next available intake appointment.
    b. Give customer revised 2151.
    c. Document with case note. Send copy to primary IDHS contact.
2. Option 2 –
    a. Complete intake orientation.
    b. After CBO has uploaded a 2151 with “Services Initiated”:
        i. Enroll the customer and select the customer’s training program on the **Progress Page**.
        ii. Complete and upload a 2151A form with the customer’s initial plan.
        iii. Add steps to the customer’s ISTEP.
        iv. Go to the customer’s ISTEP > Career Planning Tab > Review Information and add in the customer Target Occupation and Goals.
    c. Between the 1st and 5th of each following month, upload a 2151A with activities from the month that just ended.
        v. During the month, if there are any changes in activity or hours, complete and upload an amended 2151A.
        vi. If required (or as needed), submit a 4333 and 4334 form for monthly staffing on customers.

Intake Appointment

NOTE: The 2151 form must be uploaded before a customer can be enrolled into a program.

When the customer comes in for the first appointment, they should bring in their 2151 form.

1. If the customer does not bring in the 2151 form to the appointment, you can download the form from the **Progress Page**.
2. Complete your organization’s initial assessments as needed.
3. Complete the 2151 form and upload in the **Progress Page** in the Initial CBO Appointment section. If you need to make an update to the 2151 form, you can remove the form and re-upload it. The system will allow for multiple 2151 forms to be uploaded.
    a. If the customer is only completing assessments to determine if they will be enrolled during their initial appointment, upload a 2151 with “Assessments Completed.”
    d. Once the CBO has determined that the customer will be enrolled, upload a 2151 with “Services Initiated.” Once a CBO has uploaded a 2151 with “Services Initiated,” the CBO will:


State of Illinois
Department of Human Services
Referral Form
6A(1 Year)
Please check as many boxes as appropriate
Agency Action:
Client Assessment Completed Date: Expected Service Date:
Client Placed on Waiting List Date: Expected Service Date:
Client Service Initiated Date:
Specify Service
No Contact from Client
Referral Rejected Please Explain: Service not offered Service offered, but not available
Client Ineligible Client refused services
Other:
Other Pending Action Please Explain:
Date Returned: Returned By:
Distribution: Original & Copy 1 - Provider Agency: Copy 2 - Client, Copy 3 - File

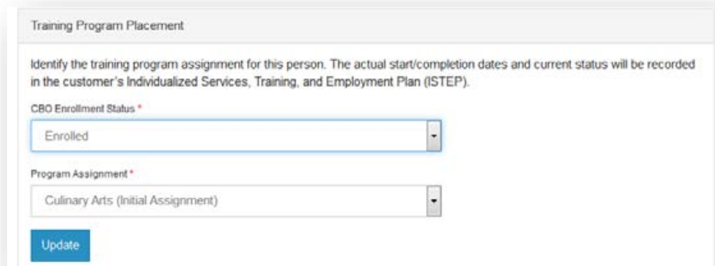
4. Select an Enrollment Status – of Enrolled.
5. Select the program in which you are placing the participant.
    a. If the CBO determines the customer is not suited for the program that was initially assigned, the CBO can:

i. Enroll them in a different program that is offered by the CBO. Select a different program from the Program Assignment dropdown menu on the **Progress Page**.

ii. Enroll them in Pre-Employment Only Services by selecting Pre-Employment Services Only Services from the Program Assignment dropdown menu on the **Progress Page**. The person can be enrolled in the training program at a later date if the program has openings.

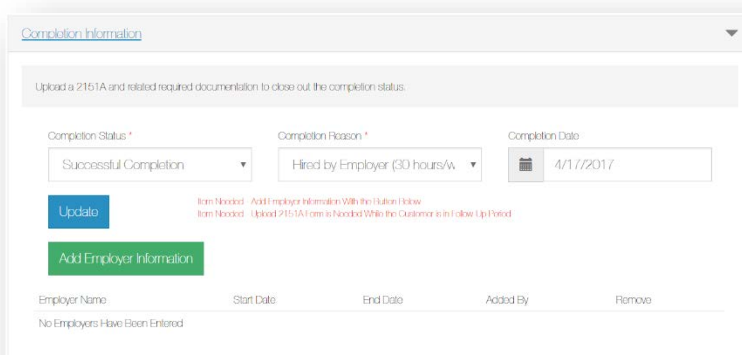
iii. This is a *last resort* option. Request for the customer to be transferred to a different CBO by uploading a 2151 with "Referral Rejected" and leave a case note. This will also populate the "Referral Rejected" section under CBO Enrollment Verification Status on the Enrolled dashboard.

b. If the CBO determines the customer is not ready for the program that was initially assigned, the CBO should still enroll them into the program from the Program Assignment dropdown menu on the **Progress Page**. The CBO will then refer the customer to the appropriate program/services to help them meet the minimum requirements of the training program – i.e., beginning levels of English as a Second Language, Remedial Math, or Reading. These additional services will be documented in the customer's Individualized, Services, Training and Employment Plan (ISTEP). These programs/services may include a referral to a substance abuse program or a Bridge program.



6. Complete a 2151A with the customer's initial plan.
7. Add planned steps to the customer's ISTEP. Provide a copy of the ISTEP plan to the customer using the Print Customer Copy button on the ISTEP timeline. *This will populate a case note and send the customer a message with a url for them to access a customer view of their ISTEP online. Failing to provide the customer a copy of their ISTEP will result in the customer's ability to successfully appeal a sanction due to policy not being followed.*
8. Go to the customer's ISTEP > Career Planning Tab > Review Information and add in the customer's Target Occupation and Goals.

How to Update EPIC Customer Completion Status



1. Go to the customer's EPIC **Progress Page**.
2. Select the Completion Information drop down.
3. Select a Completion Status.
   - In Progress
   - Completed
   - Did Not Complete
4. If the customer's Completion Status is Completed or Did Not Complete select the Completion Reason:

   a. Successful Completion

i. If the Completion Reason is Enlisted in Military or Enrolled in Training:
   1. Enter in the Completion Date and click **Update**.
   2. Use the Upload Completion Documentation button to upload the required documentation (see table below for examples).
   3. Upload the 2151A form (in the monthly progress section) indicating the customer has completed the program.

ii. If the Completion Reason is Hired by an Employer:
   1. Enter in the Completion Date and click **Update**.
   2. Enter in the Employer Information in the correct fields using the Add Employer Information button.
   3. 90-day follow-up is required. During this time, a 2151A monthly progress report is required. *Please refer to* https://www.illinoisworknet.com/partners/EPIC/documents/Exit%20Information%20document.pdf
   4. After the 90-day follow-up, upload the 2151A form (in the monthly progress section) indicating the customer has completed the program.

b. Unsuccessful Completion

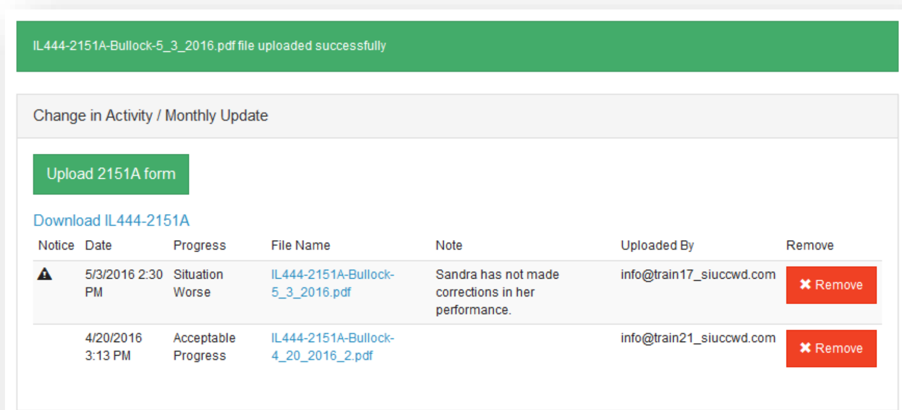
i. If the Completion Reason is Incarcerated, Not SNAP Eligible, Moved Out of State or Region, Dropped Out of the Program, or Withdrew From Study:
   1. Enter in the Completion Date and click **Update**.
   2. Upload the 2151A form (in the monthly progress section) indicating the customer has completed the program.

5. Select the Completion Date and click **Update**.
6. After you click **Update**, red text will appear in the Completion Information box to let you know what documentation is required for the customer.

Change In Activity/Monthly Update

The 2151A form is used to document customer monthly progress and any changes in their activity or hours.

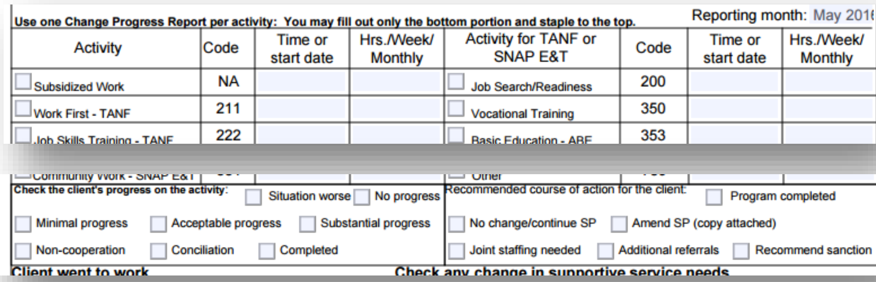
- The monthly updated 2151A form must be uploaded between the 1st and 5th of each month noting the previous month's actual activity.
- Changes in activity or hours can be uploaded at anytime.



1. Download the participant's 2151A form -- it will have their information prefilled in appropriate fields.
2. Open the document in Adobe Reader. If you need to download Adobe Reader, go to http://get.adobe.com/reader/.

NOTE: Changes made in a browser window will not save on the document.

3. Complete the document and save it to your computer.
    a. Fill in actual hours by activity area.
    b. Check the appropriate box for *Customer Progress* and *Recommended Course of Action*.



Use one Change Progress Report per activity: You may fill out only the bottom portion and staple to the top. Reporting month: May 2018

Activity	Code	Time or start date	Hrs./Week/ Monthly	Activity for TANF or SNAP E&T	Code	Time or start date	Hrs./Week/ Monthly
Subsidized Work	NA			Job Search/Readiness	200		
Work First - TANF	211			Vocational Training	350		
Job Skills Training - TANF	222			Basic Education - ABE	353		
Community Work - SNAP E&T				Other			

Check the client's progress on the activity: Situation worse; No progress; Minimal progress; Acceptable progress; Substantial progress; Non-cooperation; Conciliation; Completed

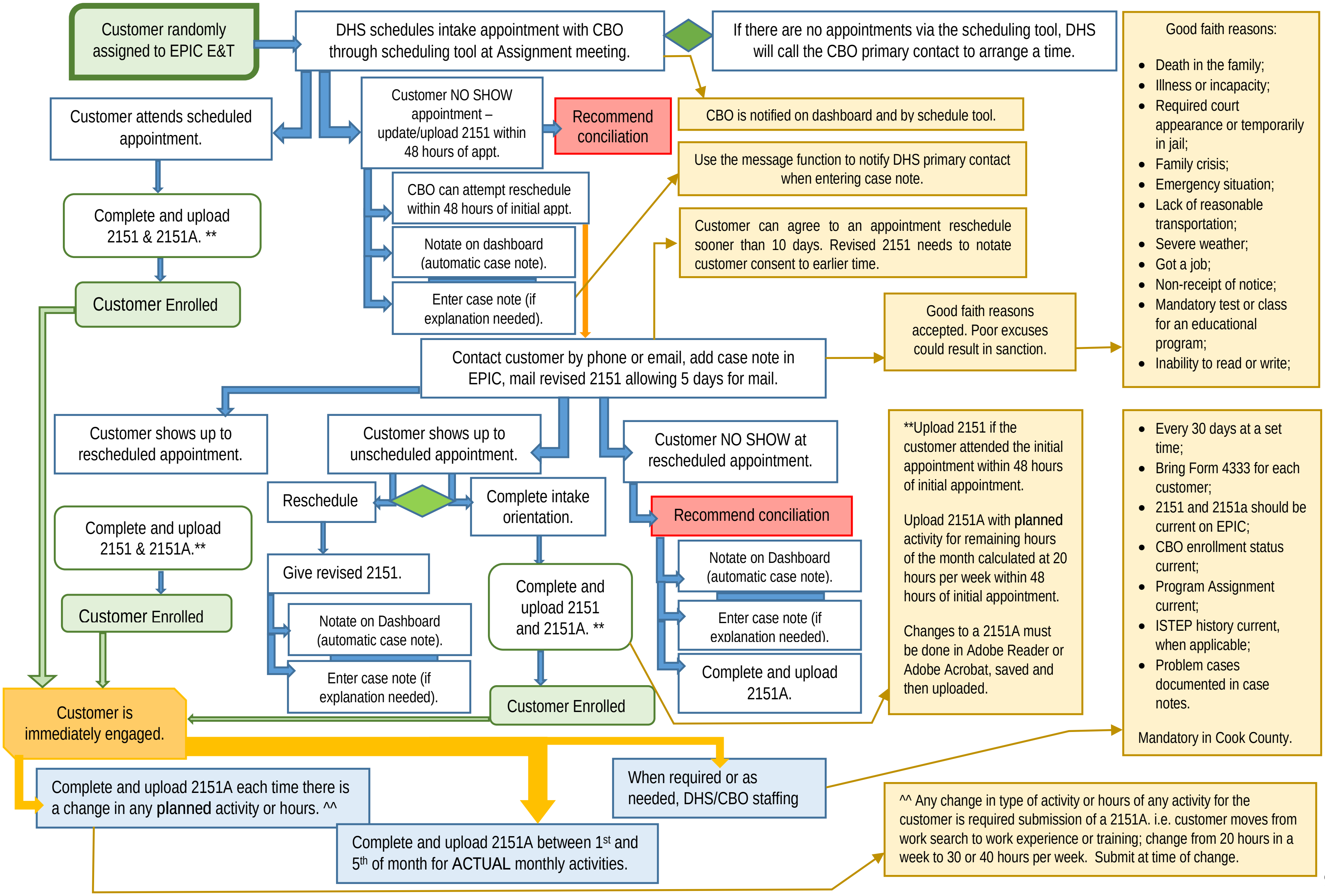
Recommended course of action for the client: Program completed; No change/continue SP; Amend SP (copy attached); Joint staffing needed; Additional referrals; Recommend sanction

Client went to work   Check any change in supportive service needs

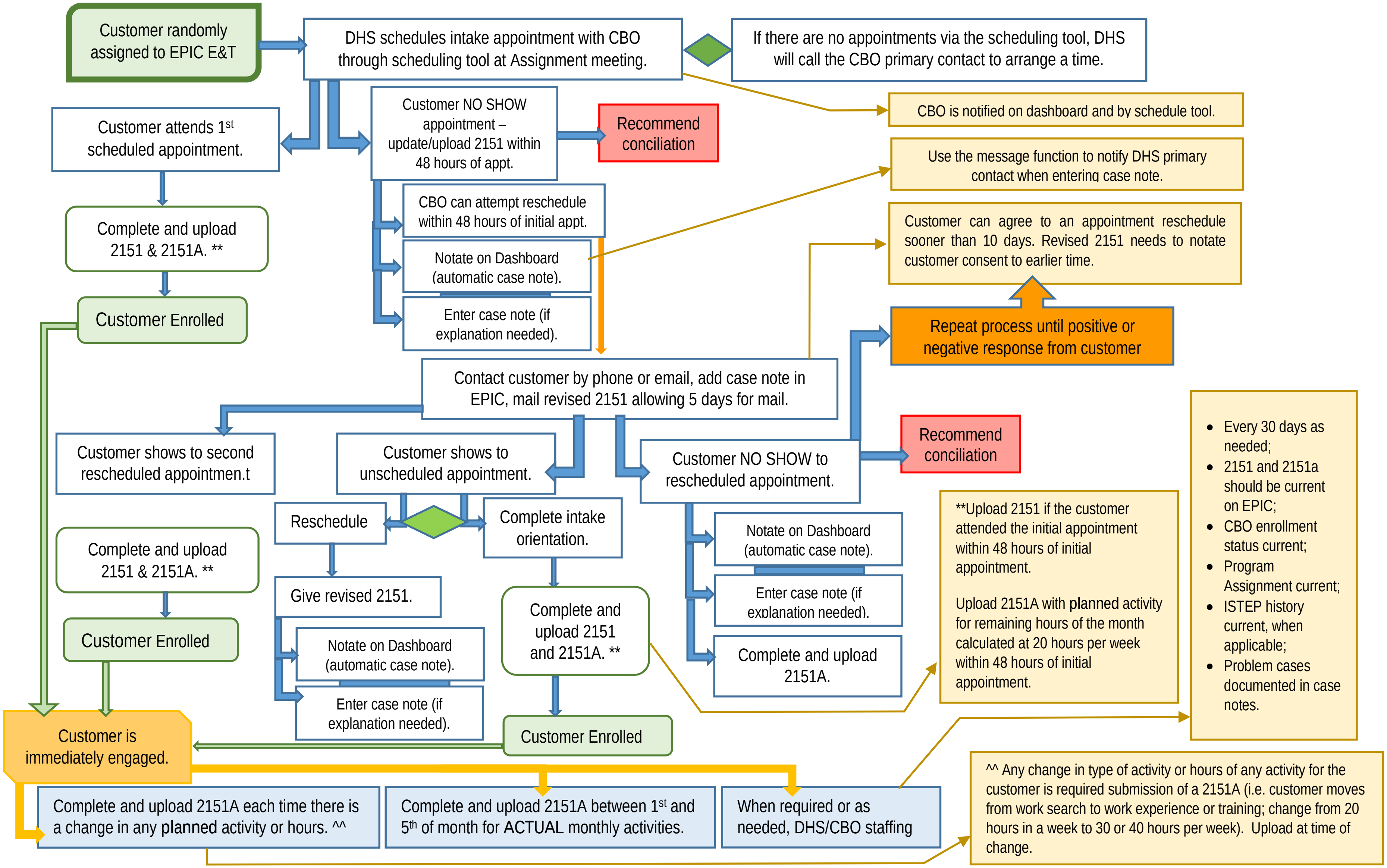
4. Select Upload 2151A form button and upload the saved document.
5. Make any notes or comments about the form. The comments will display in the summary listed on the **Progress Page**.
6. Press the Upload button.
7. You will see a message that the form has successfully uploaded. If you see a red box, verify you see the information you entered in the form is correct by re-opening your document in Adobe Reader. The system will check to see hours are entered and a box is selected in both areas on the 2151A form. If there is more than one box (or no boxes) selected in one section, the document cannot be uploaded**. This information is used to populate the Enrolled Customer dashboard**.
8. Complete the information required for the Staffing Packet Tool as required in your region.

NOTE: If Recommend Sanction is selected on the form as a recommended course of action for the customer, the customer will appear in the IDHS Review - Recommend Sanction section of the **Enrolled Customer dashboard**.

EPIC Program - Process after Customer has been Randomly Assigned to EPIC Program and Initial Intake into CBO – MANDATORY Participant



EPIC Program – Process after Customer has been Randomly Assigned to EPIC Program and Initial Intake into CBO – VOLUNTARY Participants



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