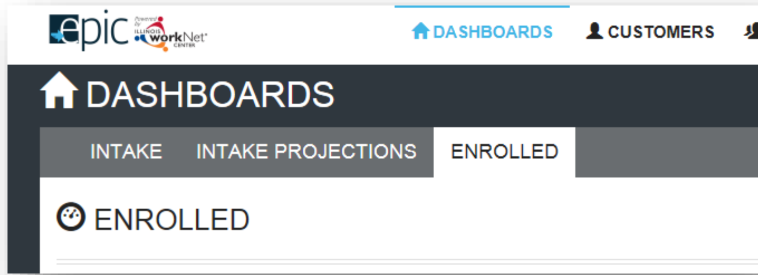
Access the Enrolled Customer Progress Page

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

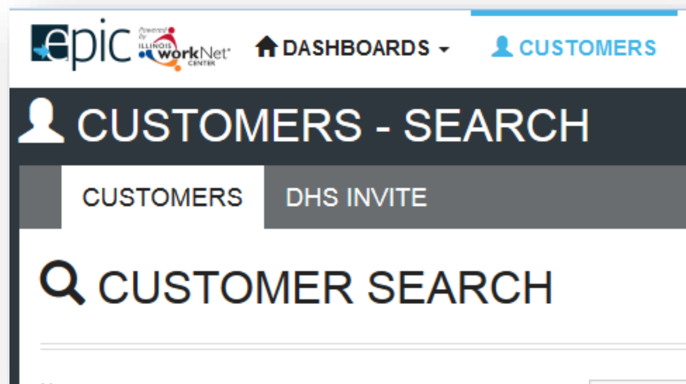
Option 1 – Dashboards

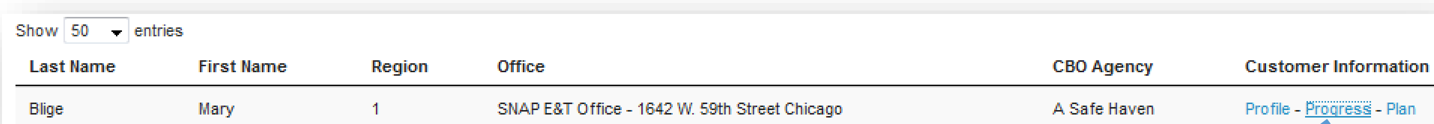
1. **Select** Dashboards at the top of the page, and then **select** Enrolled tab to view that dashboard.
2. **Click** the number associated with that line.
3. A list will show the participants associated with that specific selection. **Select** Progress option.



Option 2 – Search Customer

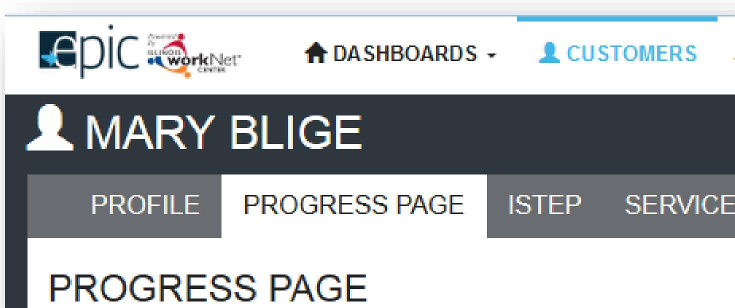
1. **Select** the Customers tab to begin a customer search. **Enter** participant's name or other search parameters.
2. **Click** Search. List appears with matching results.
3. **Select** Progress to go directly to the participant's **Progress Page**. Once you're on the participant's profile, you can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





Show 50 entries

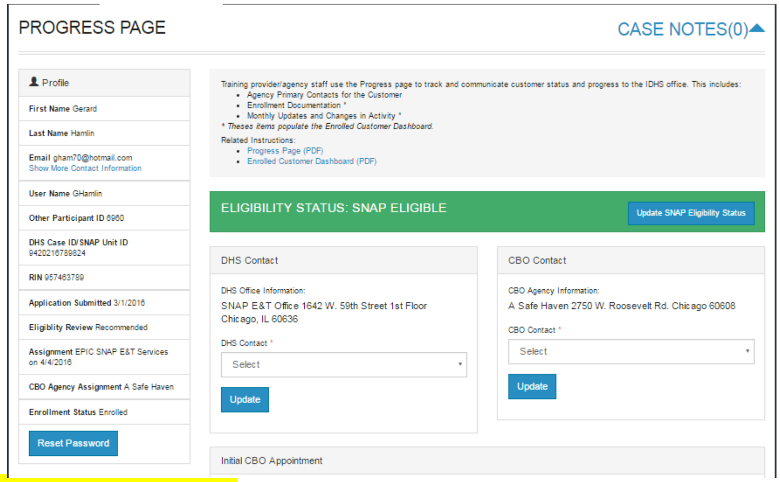
Last Name	First Name	Region	Office	CBO Agency	Customer Information
Blige	Mary	1	SNAP E&T Office - 1642 W. 59th Street Chicago	A Safe Haven	Profile - Progress - Plan



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

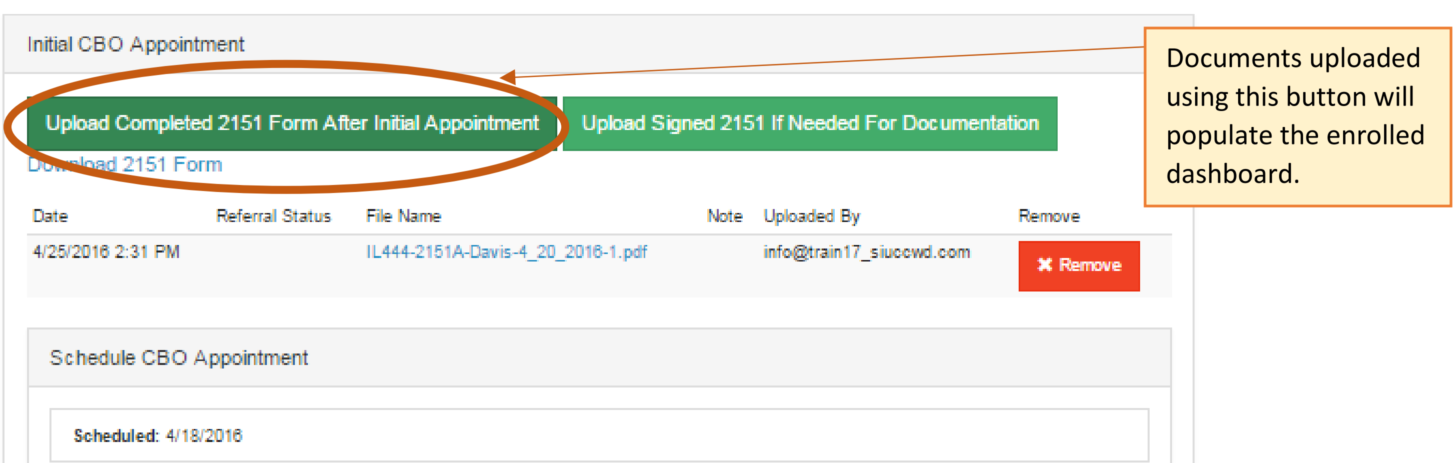


- DHS staff **update** the customer's Eligiblity Status throughout their enrollment in EPIC, to ensure that the customer is eligible for participation.
- CBO staff can quickly **view** the status of the customer on their **Progress Page**. Customers can only be engaged if they are SNAP Eligible or Exempt.
- Possible Eligiblity Statuses include:
    - SNAP Eligible and Not Receiving TANF Benefits
    - SNAP Eligible and Exempt Not Receiving TANF Benefits
    - SNAP Ineligible
    - TANF Recipient not EPIC Eligible

Identify Primary Contacts

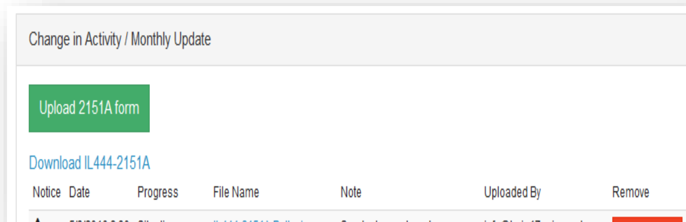
- DHS staff can identfy the primary DHS Contact for the customer.
- CBO staff can identify the primary CBO Contact for the customer. CBO primary contacts are established by program. If a primary contact needs to be changed for a particular customer, it can be done on this page.

Initial CBO Appointment



1. DHS 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, DHS 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 five 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. DHS 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.
3. Complete and upload 2151A for planned activities for remaining hours in month at 20 hours per week. Upload required form within 48 hours of appointment.



4. Mark customer **Enrolled** on **Progress Page**.
5. Select actual Program Assignment found under Training Program Placement.
6. Go to Customer ISTEP > Career Planning Tab > Review Information – Goals.
7. Edit **Target Pathway** and **Target Occupation**.
8. 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 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 DHS 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.

Customer Attends Rescheduled Appointment

1. Complete 2151 form, upload to **Progress Page** within 48 hours of appointment.
2. Complete and upload 2151A for planned activities for remaining hours in month, at 20 hours per week. Upload required within 48 hours of appointment.

3. Mark customer **Enrolled** on **Progress Page**.
4. Select actual Program Assignment.
5. Go to Customer ISTEP > Career Planning Tab > Review Information – Goals, Edit Target Pathway and Target Occupation.
6. 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 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 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

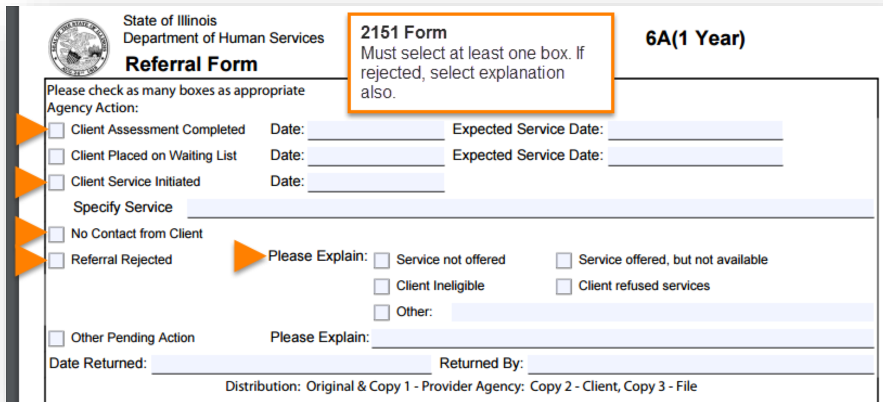
1. Option 1 –
   a. Reschedule appointment to next available intake appointment.
   b. Give customer revised 2151.
   c. Document with case note. Send copy to Primary DHS contact.
2. Option 2 –
   a. Complete intake orientation.
   b. Complete 2151 form, upload to **Progress Page** within 48 hours of appointment.
   c. Complete and upload 2151A for planned activities for remaining hours in month, at 20 hours per week. Upload required within 48 hours of appointment.
   d. Mark customer **Enrolled** on **Progress Page**.
   e. Select actual Program Assignment.
   c. Between the 1st and 5th of each following month, upload a 2151A with activities from the month that just ended.
      i. During the month, if there are any changes in activity or hours, complete and upload an amended 2151A.
      ii. If required (or as needed), submit a 4333 and 4334 form for monthly staffng on customers.

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

Intake Appointment

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.



State of Illinois
Department of Human Services
Referral Form

2151 Form
Must select at least one box. If rejected, select explanation also.

6A(1 Year)

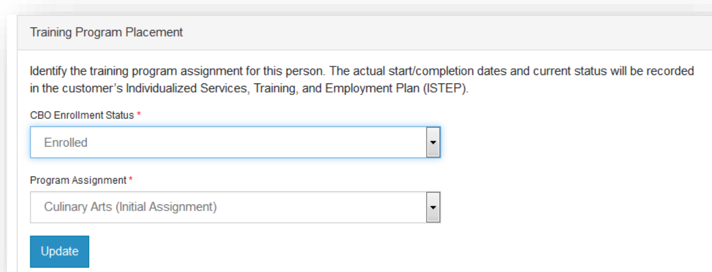
Please check as many boxes as appropriate
Agency Action:

- ☐ 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 – Not Enrolled, Enrolled, or Exited.
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. Request for the customer to be transferred to a different CBO. This is a *last resort* option. The request will need to be submitted to the DHS and Commerce Admin staff via email. 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.



Training Program Placement

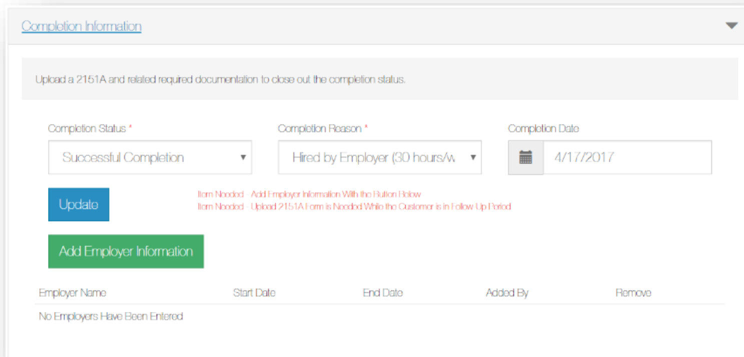
Identify the training program assignment for this person. The actual start/completion dates and current status will be recorded in the customer's Individualized Services, Training, and Employment Plan (ISTEP).

CBO Enrollment Status *
Enrolled

Program Assignment *
Culinary Arts (Initial Assignment)

Update

How to Update EPIC Customer Exit Status



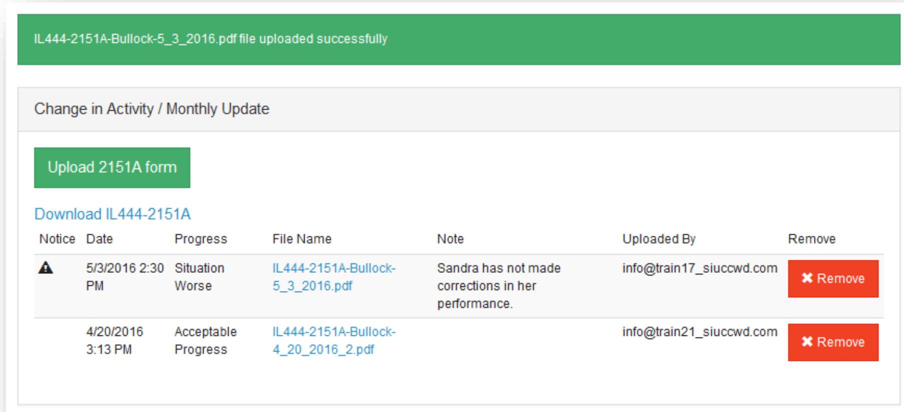
1. Go to the customer's EPIC **Progress Page**.
2. Select the Completion Information drop down.
3. Select an Exit Status.
   - Not Completed
   - Successful Completion
   - Unsuccessful Completion
4. If the customer's Exit Status is Successful Completion or Unsuccessful Completion select the Completion 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.
         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

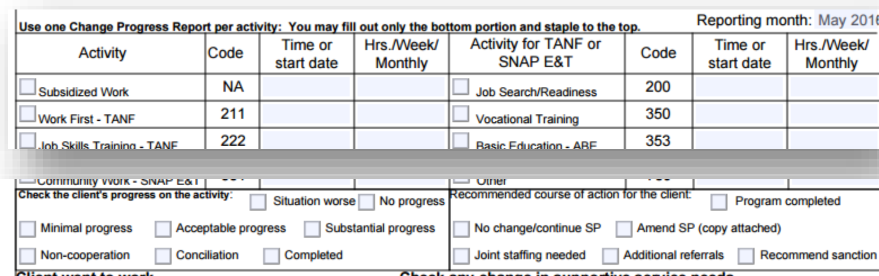
The 2151A form is used to document customer monthly progress and any changes in their activity or hours.

- The monthly update 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.



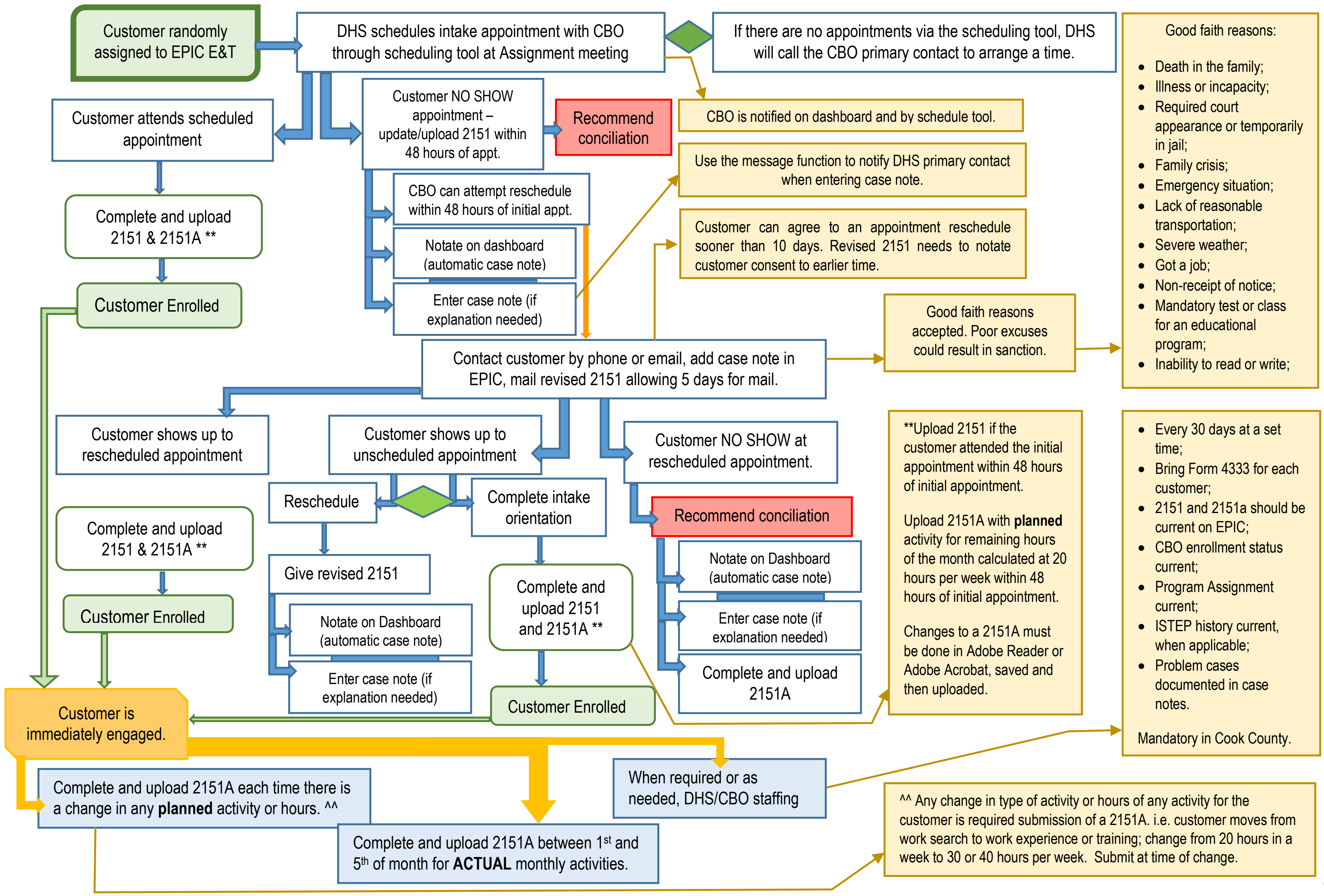
1. Download the participant's 2151A form -- it will have their information prefilled in appropriate fields.
2. Open the document in Adobe Reader. If you need to download Adobe Reader, go to http://get.adobe.com/reader/.
3. Complete the document and save it to your computer.
   a. Fill in actual hours by activity area.
   b. Check the appropriate box for *Customer Progress* and *Recommended Course of Action*.
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**.

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

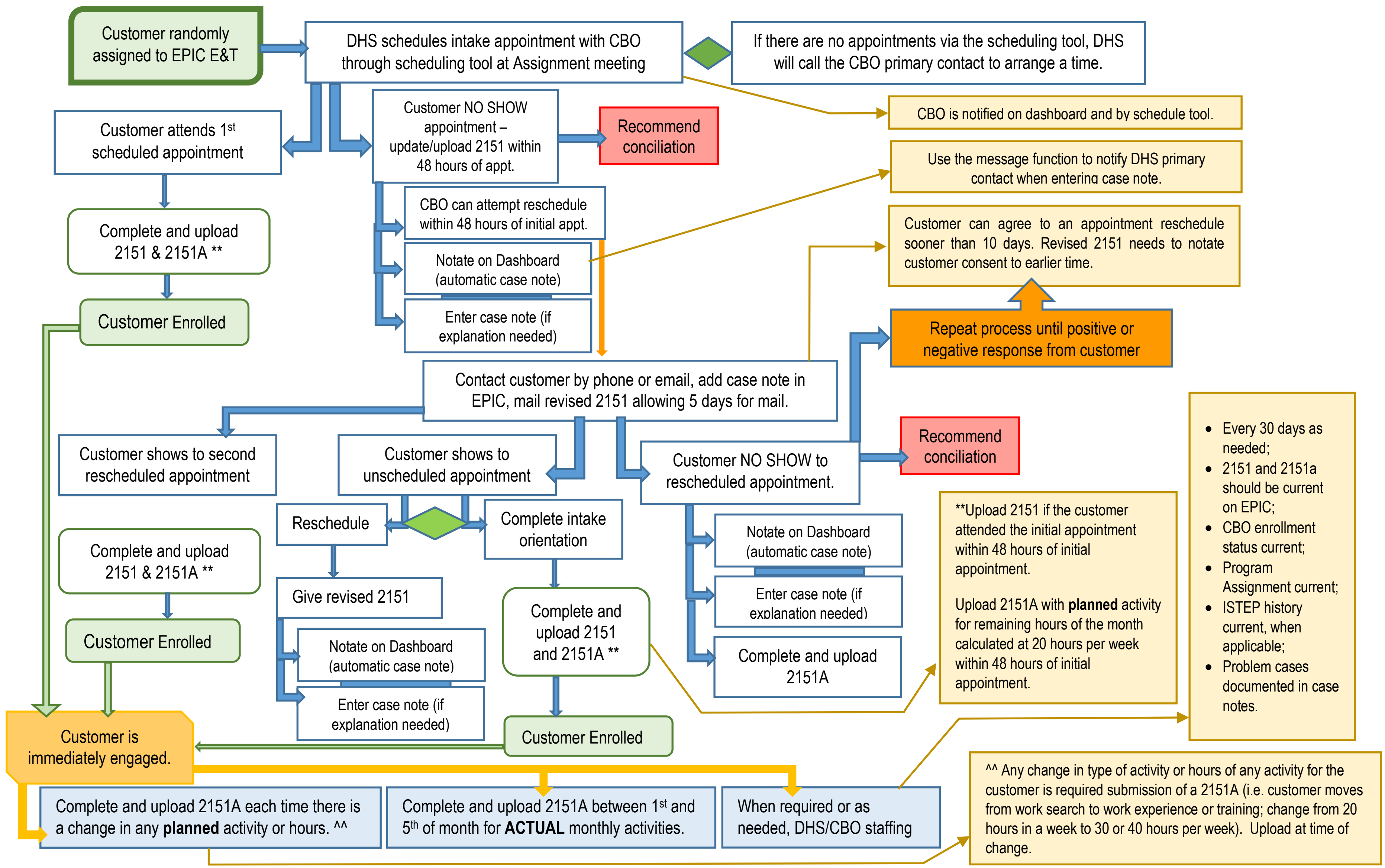


NOTE: If Recommend sanction is selected on the form as a recommended course of action for the customer, the customer will appear in the DHS Review - Recommend Sanction section of the **Enrolled Customer dashboard**.

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



Funding for research provided by United State Department of Agriculture (USDA). USDA is an equal opportunity employer and provider.