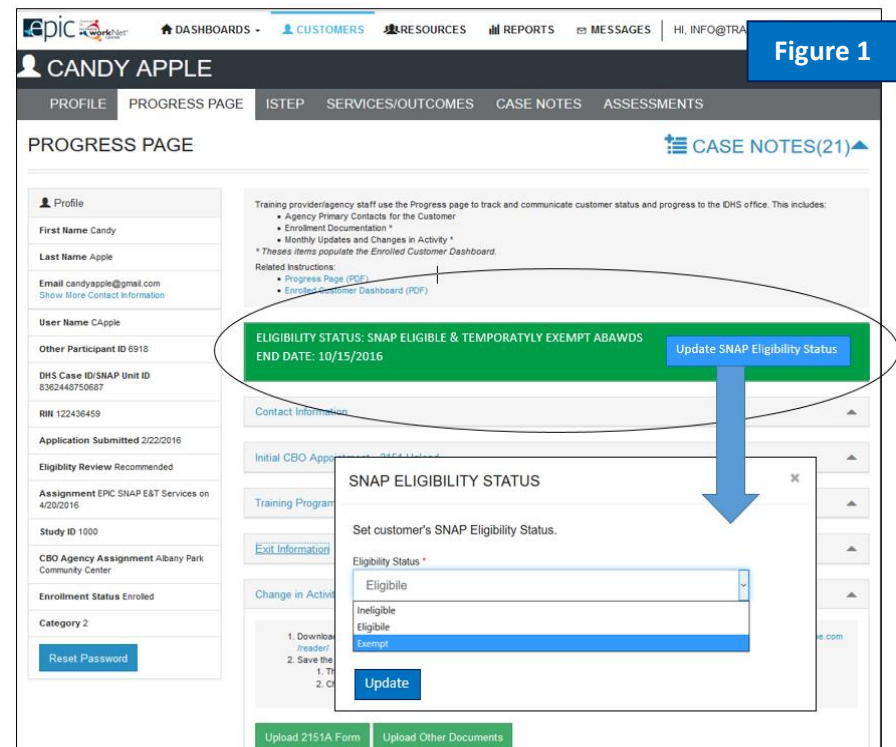


Exempt Customers

- **CBO Procedures - If a customer expresses they have a health issue that prevents them from completing training prior to enrollment.**
 - Upload the 2151 form with **No Contact from Client** checked within 48 hours of the initial appointment. * (Even though contact has been made, by checking this box DHS will be notified to follow up with that customer.)
 - Upload the 2151A with **No Longer Appropriate for Provider Services** checked (Pg. 2) and leave a detailed reason in the comment section (Pg. 3)
 - Enter a Case Note on the customer's Progress Page. Send it via Illinois workNet message and email to the DHS Primary Contact and Eligibility Review Team.

- **DHS Procedures – If a customer expresses they have a health issue that is preventing them from completing training prior to enrollment with the CBO.**
 - A system generated message will notify DHS that the customer was not enrolled with the CBO they were assigned to.
 - Check the customer's Case Notes on the Progress Page to determine the reason why the customer was not enrolled.
 - Meet with the customer and determine if they qualify for an exemption.
 - If they qualify for an exemption, update the Eligibility Status to 'Exempt' on the Progress Page.
 - Enter a Case Note on the customer's Progress Page. Send it via Illinois workNet message and email to the CBO Primary Contact notifying them you met with the customer



and the outcome (exempt or not exempt). If it is a temporary exemption, include the end date in the Case Note.

- **CBO Procedures - The customer has already enrolled with the CBO when they express their health issues.**
 - Upload the 2151A with **No Longer Appropriate for Provider Services** checked (Pg. 2) and leave a detailed reason in the comment section (Pg. 3).
 - Enter a Case Note on the customer's Progress Page. Send it via Illinois workNet message and email to the DHS Primary Contact and Eligibility Review Team.

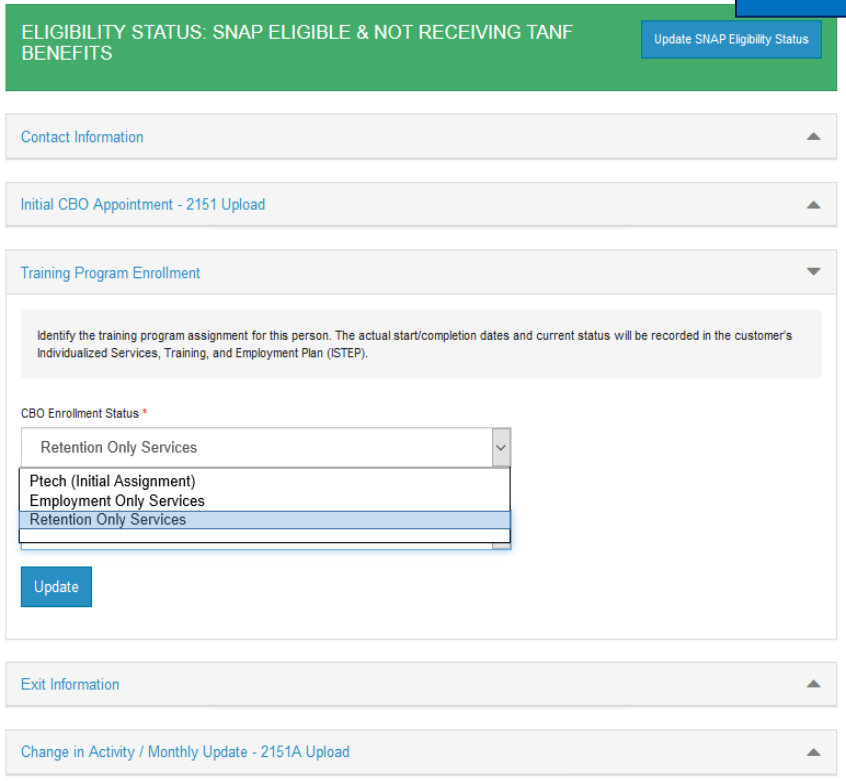
- **DHS Procedures - The customer has already enrolled with the CBO when they express their health issues.**
 - A system generated Illinois workNet message will notify DHS that the customer was not enrolled with the assigned CBO.
 - Check the customer's Case Notes on the Progress Page to determine the reason why the customer was not enrolled.
 - Meet with the customer and determine if they qualify for an exemption.
 - If they qualify for an exemption, update the Eligibility Status to 'Exempt' on the Progress Page. *(see Figure 1)*
 - Enter a Case Note on the customer's Progress Page. Send it via Illinois workNet message and email to the CBO Primary Contact notifying them you met with the customer and the outcome (exempt or not exempt). If it is a temporary exemption, include the end date in the Case Note.

Retention Only Services

- **CBO Procedures – If customer gets a job, but has not started or completed training program.**

- On the Progress Page, in the Training Program Enrollment section under Program Assignment, mark the customer as **Retention Only Services**.
 - On the 2151A with **Acceptable Progress** checked, fill out the **Client went to work** box. On page 3 of the 2151A enter the Customers Work ID #, if available (this number could be located on the customers pay stub, or the customer may know it).
 - Upload a copy of all of the customer pay stubs received during the 90 day retention period.
 - Make a Case Note including the Name of the Employers, the start date for the customer, how far along customer was in the training program. Send it via Illinois workNet message and email to the DHS Primary Contact and Eligibility Review Team.
 - Follow up with the customer for the 90 day retention period. Do not 'Exit' the customer until after the retention period.
- * CBOs will still need to show services provided in the ISTEP.*

Figure 2



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

Contact Information ▲

Initial CBO Appointment - 2151 Upload ▲

Training Program Enrollment ▼

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 *

Retention Only Services ▼

Ptech (Initial Assignment)

Employment Only Services

Retention Only Services

[Update](#)

Exit Information ▲

Change in Activity / Monthly Update - 2151A Upload ▲

- **DHS Procedures - If customer gets job, but has not started or completed training program.**

- An email and Illinois workNet message will be sent via Case Note to notify DHS that a customer has found employment. DHS will need to reach out to the customer to set up an appointment to determine if the customer is exempt or no longer SNAP eligible based on their employment.

- Once DHS determines the customer's Eligibility Status, it should be updated on that section of customer's Progress Page. (See figure 1)
- Make a Case Note notifying the CBO that you met with the customer and provide the current Eligibility Status.
- Upload documentation – Pay Stub & Work ID #, if not already in the system.

- **CBO – If customer is still SNAP Eligible**
 - If during the 90 day follow up period, the customer loses their job, they can be placed back in the EPIC program to finish where they left off. If training program is already over, they can be enrolled in another training program (or the same one, if it will be offered again).
 - If the customer is still employed after 90 day follow up period, 'Exit' the customer.

- **CBO – If customer is No Longer SNAP Eligible**
 - If during the 90 day follow up period, the customer loses their job, they can be placed back in the EPIC program to finish where they left off if the program was paid for before they lost their SNAP benefits.
 - If it was not paid for, and the customer wishes to participate in EPIC, they will have to go back to DHS (to determine if losing their job made them SNAP eligible again).
 - If the customer is still employed after the 90 day follow up period, 'Exit' the customer.

Scenario	CBO Communicates to DHS	DHS	DHS Communicates to CBO	Notes*/**
<p><u>Health Issues</u> - Customer expresses they have health issues that prevent them from completing training program prior to enrollment, (during initial appointment).</p>	<ul style="list-style-type: none"> • Upload the 2151 form with No Contact from Client checked within 48 hours of the initial appointment. • Upload the 2151A with No Longer Appropriate for Provider Services checked (Pg. 2) and leave a detailed reason in comment section. (Pg. 3) • Add a case note, then send it via Illinois workNet message and email to DHS contact and eligibility review team. • Customer will display in No Longer Appropriate for Provider Services section on dashboard. 	<ul style="list-style-type: none"> • The customer will go back to DHS (and they will determine if customer is exempt, or needs to go through conciliation). • When eligibility Status is updated to exempt, a system Generated Message will be sent. 	<ul style="list-style-type: none"> • Update Progress Page if exempt. This will populate the dashboard. • Add a case note, then send via Illinois workNet message and email to Primary CBO Contact notifying them that you have meet with the customer (and they are or are not exempt). • If temporarily exempt, include the end date in case note. • If marked as exempt, customer will display in DHS Indicated Customer is Exempt section of dashboard. 	<p>* Work with customer to help them complete training. Try to engage them in training as much as possible. The customer may need to be realigned with more appropriate program (based on their health issue). The customer can still complete training program if they are exempt, if they want to. They would be a voluntary customer.</p> <p>*If customer is not determined to be exempt by DHS, they can face consequences for not participating.</p>
<p><u>Health Issues</u> - The customer has already enrolled with CBO when they express their health issues.</p> <p><i>Examples: If customer is training to be truck driver, and they break their leg, it would be temporary health issue. Customer would not be able to participate in training with their injury. Customer would continue their training after their exemption period is up.</i></p> <p><i>If customer has chronic health issue, they may need to be realigned with more appropriate program, based</i></p>	<ul style="list-style-type: none"> • Upload the 2151A with No Longer Appropriate for Provider Services checked (Pg. 2) and then leave detailed reason in comment section (Pg. 3). • Add case note, then send it via Illinois workNet message and email to DHS contact and eligibility review team. • Customer will display in No Longer Appropriate for Provider Services section on dashboard. 	<ul style="list-style-type: none"> • The customer will go back to DHS (to determine if the customer is exempt, or needs to go through conciliation). • When eligibility Status is updated to exempt, a system Generated Message will be sent. 	<ul style="list-style-type: none"> • Update the Progress Page if exempt. This will populate the dashboard. • Add a case note, then send via Illinois workNet message and email to Primary CBO Contact notifying them that you have meet with the customer (and they are or are not exempt). • If temporarily exempt, include end date in case note. 	<p>* Work with customer to help them complete training. Try to engage them in training as much as possible. The customer may need to be realigned with more appropriate program (based on their health issue). The customer can still complete training program on a voluntary basis. If customer is exempt for a temporary period, they can continue training after exemption is over.</p> <p>*If customer is not determined to be exempt by DHS, they can face</p>

<p>on the issue.</p>				<p>consequences for not participating.</p>
<p><u>Employment</u> – The customer gets a job, but has not started or completed the training program – still snap eligible.</p>	<ul style="list-style-type: none"> • Make a case note, include Names of Employers, start date for customer, and how far along customer was in training program. • On the Progress Page, in Training Program Enrollment section under Program Assignment, mark customer as Retention Only Services. • On the 2151A with Acceptable Progress checked, fill out the Client went to work box. On page 3 of the 2151A, enter Customer’s Work ID # (this number could be located on the customer’s pay stub, or the customer may know it). • Upload copy of all the customer pay stubs received during 90 day retention period. • The 90 day follow up period will begin, do not ‘Exit’ the customer yet. You can offer the customer job retention services to help them keep their job. • If during the 90 day follow up period, if customer loses their job, and they are -- <ul style="list-style-type: none"> ○ Still SNAP Eligible: they can be placed back in EPIC program and finish off where they started. If training program is already over, they can be enrolled in another 	<ul style="list-style-type: none"> • The customer needs to go back to DHS (to determine if the customer is exempt, or no longer SNAP eligible based on their employment). 	<ul style="list-style-type: none"> • Once DHS determines the status of the customer, it needs to be updated on the customer’s progress page. • Upload documentation – Pay Stub & Work ID # (if not already in the system). 	<p>*If the training program has already been paid for, customer can continue training. Is job in the same career pathway customer was working towards? Work with customer to see if they will still be able to finish their training while working. If so, they can continue on as a voluntary participant. If it is in the same career pathway, they might be eligible for a raise in pay (with the added training they receive). If it is not in the same career pathway, then explain to customer that if they complete the training, they might be able to get a job in career pathway they are interested in (after training is complete).</p> <p>* If the client’s employment was NOT directly related to the CBO’s efforts, the CBO will be paid for enrollment (if client has begun training program), completion (if client stays in and completes EPIC training plan) and retention (if CBO provides and documents retention services).</p>

	<p>training program (or same one, if it will be offered again).</p> <ul style="list-style-type: none"> ○ No Longer SNAP Eligible: they can be placed back in the EPIC program and finish off where they started, if the program was paid for before they lost their SNAP benefits. If the training program has not been paid for, and they would like to get back into EPIC, to continue participation they will have to go back to DHS. Customers have to be SNAP eligible again before they can continue participation. ● Customer will display in Hired By Employer – In Follow-Up Period section of dashboard for retention process. ● After 90 day retention process, customer can be exited. This will display in Hired By Employer – Uploaded Completed 2151A & Documentation section of dashboard. 			
<p>Customer moves out of a region into another region.</p>	<ul style="list-style-type: none"> ● Update the Exit Information to reflect they moved out of state or region. ● Upload the 2151A Form with Completed. 	<ul style="list-style-type: none"> ● When a new client comes in, make sure to ask if customer has ever hear of EPIC program. 	<ul style="list-style-type: none"> ● If the customer had previously participated in EPIC in a different area/region, contact epic@illinoisworknet.com. 	

	<ul style="list-style-type: none"> • Inform the customer that if they are staying in state and moving to a different area that when/if they visit their local DHS office after the move, they should inform them they were an EPIC participant (the customer may be able to get back in, in their new area, if EPIC is available). 		<p>Inform them that you have a customer who has moved to new area and needs their information updated in EPIC.</p> <ul style="list-style-type: none"> • A Customer Service Representative will call you to get the required information needed to move customer. Customer's information cannot be transmitted via email. 	
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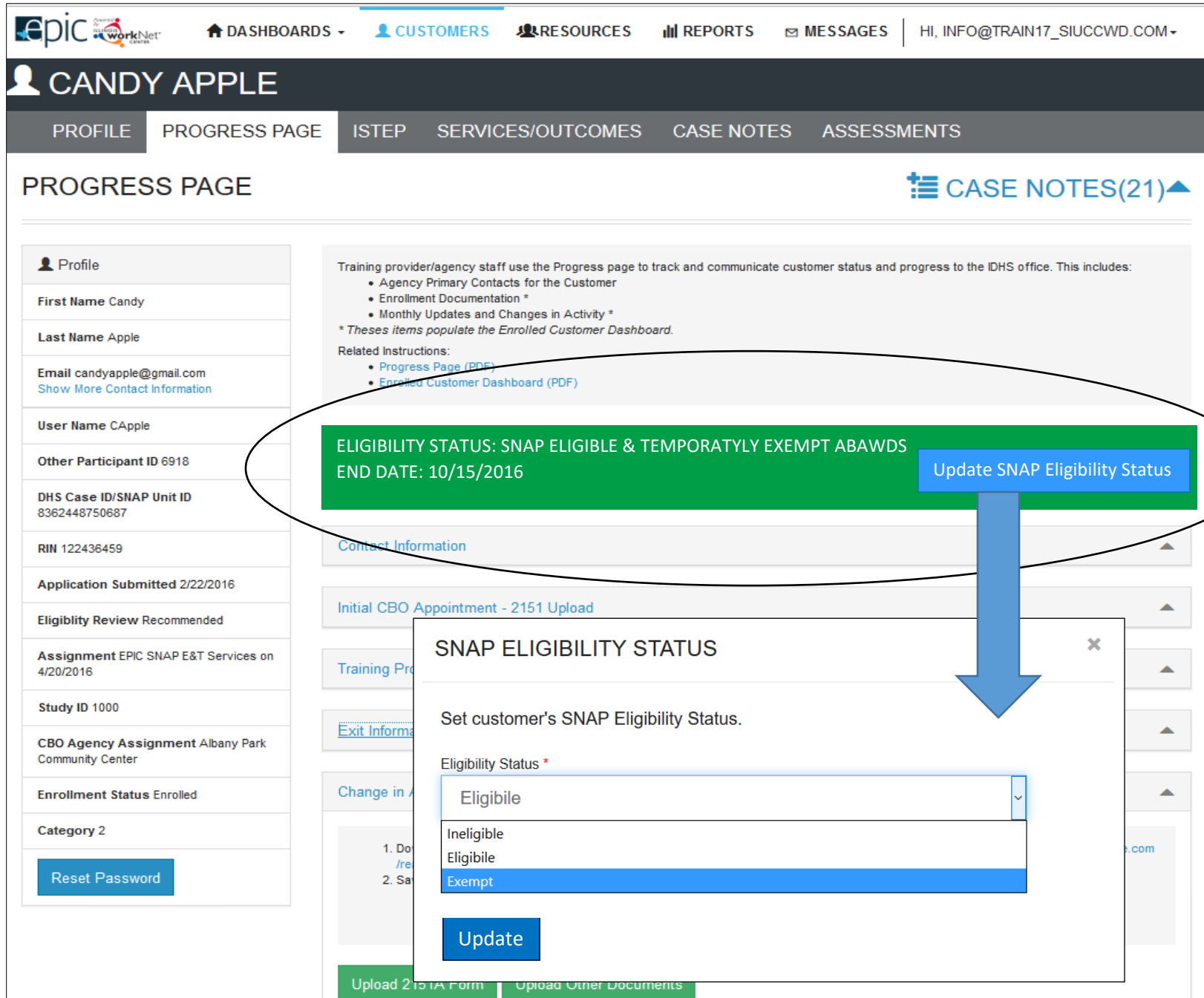
Mock Up of Dashboard – Bright=New


CBO Enrollment Verification Status				
Referral Pending - Appointment has not been Scheduled	<u>25</u>	23%		
Referral Pending - Scheduled Appointment	<u>15</u>	14%		
Referral Pending - Need 2151	<u>3</u>	3%		
Referral Pending - 2151 Past Due	<u>21</u>	19%		
Referral Pending - No Contact From Customer / Recommend Conciliation	<u>1</u>	1%		
Referral Rejected	<u>0</u>	0%		
Referral Accepted & Enrollment Started - Enrollment Required	<u>0</u>	0%		
Referral Accepted & Enrollment Verified	<u>41</u>	37%		91%
DHS Indicated Customer is Exempt	<u>2</u>	2%		4%
DHS Indicated Customer NOT Currently SNAP Eligible	<u>1</u>	1%	2%	
Withdrew From Study	<u>3</u>	3%	7%	
Total	110			
Recommended Course of Action (Based on most recent 2151A form) - Upload monthly progress between the 1st and 5th of each month				
CBO needs to upload - Past Due	<u>35</u>	85%		
Enrolled Customers - 2151A Forms Up-to-date	<u>1</u>	2%		17%
Exited Customers - Follow-Up Required & 2151A Forms Up-to-date	<u>0</u>	0%		0%
Exited Customers - Follow-Up Not Required	<u>5</u>	12%		83%

Total	41			
2151A Client's Progress: (Based on 2151A Up-to-date uploaded forms)				
Situation Worse	0	0%		
No Progress	0	0%		
Minimal Progress	0	0%		
Acceptable Progress	0	0%		0%
Substantial Progress	0	0%		0%
No Longer Appropriate for Provider Services	0	0%		0%
Non-Cooperation	0	0%	0%	
Conciliation	1	100%	100%	
DHS Review - Recommend Sanction	0	0%	0%	
Total	1			
Completion Status				
Hired By Employer - In Follow-Up Period	4	44%		
Exited Status - Completion Documentation Needs Uploaded	3	33%		
Hired by Employer - Uploaded Completed 2151A & Documentation	0	0%		0%
Enrolled in Training - Uploaded Completed 2151A & Documentation	0	0%		0%
Enlisted in Military - Uploaded Completed 2151A & Documentation	1	11%		100%
Dropped Out of Program - Uploaded Completed 2151A	0	0%	0%	

No Longer SNAP Eligible - Uploaded Completed 2151A	<u>0</u>	0%	0%	
Moved Out of State or Region - Uploaded Completed 2151A	<u>1</u>	11%	100%	
Incarcerated - Uploaded Completed 2151A	<u>0</u>	0%	0%	
Withdrew From Study - Uploaded Completed 2151A	<u>0</u>	0%	0%	
Total	9			

Progress Page Mock Up



epic  DASHBOARDS CUSTOMERS RESOURCES REPORTS MESSAGES | HI, INFO@TRAIN17_SIUCCWD.COM

CANDY APPLE

PROFILE **PROGRESS PAGE** ISTEP SERVICES/OUTCOMES CASE NOTES ASSESSMENTS

PROGRESS PAGE CASE NOTES(21)

Profile

First Name Candy

Last Name Apple

Email candyapple@gmail.com
[Show More Contact Information](#)

User Name CApple

Other Participant ID 6918

DHS Case ID/SNAP Unit ID 8362448750687

RIN 122436459

Application Submitted 2/22/2016

Eligibility Review Recommended

Assignment EPIC SNAP E&T Services on 4/20/2016

Study ID 1000

CBO Agency Assignment Albany Park Community Center

Enrollment Status Enrolled

Category 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 & TEMPORATYLY EXEMPT ABAWDS
END DATE: 10/15/2016 [Update SNAP Eligibility Status](#)

SNAP ELIGIBILITY STATUS

Set customer's SNAP Eligibility Status.

Eligibility Status *

- Eligibile
- Ineligible
- Eligibile
- Exempt

[Update](#)

[Upload 215 IA Form](#) [Upload Other Documents](#)

Progress Page Overview

Health Issues - Exemptions

When you select **Update SNAP Eligibility Status** you should get the following three options

- Eligible
- Ineligible
- *Exempt*

If you select **Exempt** the Eligibility Status (located on the progress page in the green box) should read **ELIGIBILITY STATUS: SNAP ELIGIBLE & EXEMPT ABAWD** and the customer will display in the **CBO Enrollment Verification Status - DHS Indicated Customer is Exempt** area of the dashboard. If the customer is exempt only for a temporary period of time the end date for their exemption will be noted in the Case Notes by the DHS case worker.

Work with the customer to help them complete training, try and engage them in the training as much as possible. The customer may need to be realigned with a more appropriate program based on their health issue. The customer can still complete the training program if they are exempt if they want to. They would be a voluntary customer.

If the customer is not determined to be exempt by DHS they can face consequences for not participating. Until the customer's SNAP Status has been changed to exempt the customer should continue to be engaged in activities and training.

System Generated Message

Message –

Subject: Customer Exempt

IMPORTANT: DHS has indicated this person is Exempt.

NOTE: You have received this message because you have an EPIC partner account associated with the same office as the customer.

NEXT STEPS:

The customer may need to be realigned with a more appropriate program based on their health issue. The customer can still complete the training program as a voluntary customer if they want to. If it is a temporary exemption you can find the end date in the case notes, if/when the exemption period is over the customer will need to be regularly engaged and continue full participation in the EPIC program.

Case Note –

This customer is currently Exempt.

**The primary focus of EPIC is to engage customers in training programs offered in their areas. We understand that some of the customer that enroll in EPIC may have situations that arise that prevent them from completing training. However, it is important to the program that you work with your customer as best you can to get them in a training program that will work for them based on their situation and help them to complete that program. Exempt customers can still complete training on a voluntary basis; however, they may need to be realigned to a more appropriate training program based on their situation.

Progress Page Mock Up

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

Contact Information ▲

Initial CBO Appointment - 2151 Upload ▲

Training Program Enrollment ▼

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 *

Retention Only Services ▼

- Ptech (Initial Assignment)
- Employment Only Services
- Retention Only Services

Exit Information ▲

Change in Activity / Monthly Update - 2151A Upload ▲

Progress Page Overview

Found Employment Before Completing Training Program

On the Progress Page in the **Training Program Enrollment** Section under **Program Assignment** the dropdown box should allow the CBO's to choose from

- Training Programs
- Employment Only Services
- *Retention Only Services*

When **Retention Only Services** is selected the customer should display in the **Retention Only Services & Hired By Employer - In Follow-Up Period** areas on the dashboard. **Retention Only Services should only be selected if the customer finds employment and is no longer participating in the training and retention only services are all that is being provided. If the customer finds employment and continue with the training their Program Assignment will be marked with the Training Program.

Is the job in the same career pathway the customer was working towards? Work with the customer and see if they will still be able to finish their training while working, they can continue on as a **voluntary participant**. If it is in the same career pathway they might be eligible for a raise in pay with the added training they receive. If it is not in the same career pathway then explain to the customer that if they complete the training they might be able to get a job in the career pathway they are interested in after training is complete.

The CBO will need to follow up with the customer for the 90 day retention period following their hire. Job retention services can be provided to the customer to help them retain their job. If the customer loses their job within the 90 day period they can be placed back in the EPIC program and finish off where they started. If the training program is already over they can be enrolled in another training program or the same one if it will be offered again. If the customer lost their SNAP eligibility due to their employment they will have to go back to DHS before they continue with EPIC, they have to be SNAP eligible before they can participate again.

** The primary focus of EPIC is to engage customers in training programs offered in their areas. We understand that some of the customer that enroll in EPIC may have situations that arise that prevent them from completing training. However, it is important to the program that you work with your customer as best you can to get them in a training program that will work for them based on their situation and to help them to complete that program. Customers may find employment before completing training; however, they can continue on as a voluntary participant. If the customer got a job in the same career pathway they were training in make sure the customer understands the benefits completing training could provide even though they already have a job; pay raise, job security, professional growth, ect. If the customer is employed in a different career pathway than the one they were training in ensure the customer knows that they can continue training during their employment and once they complete training they can either use that to grow in their company or get a job new jobs in the career pathway they are most interested in.



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