

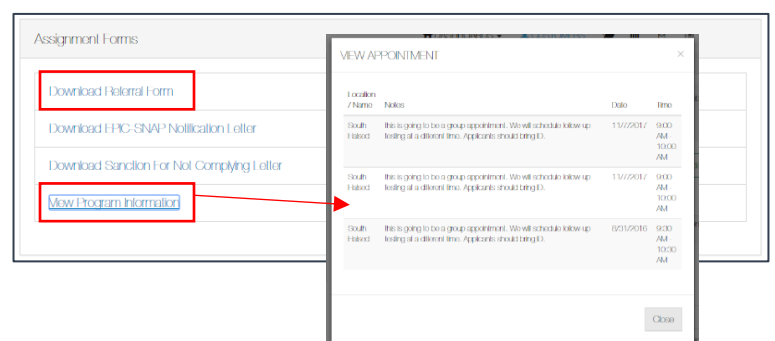
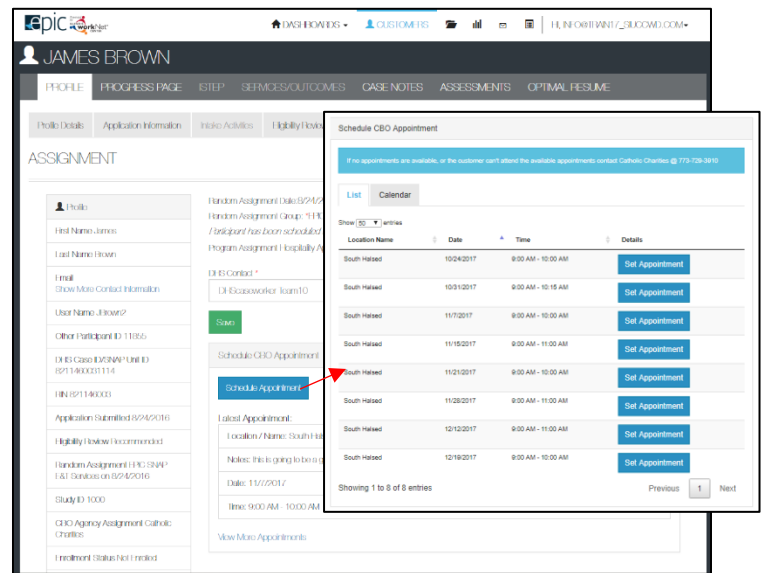
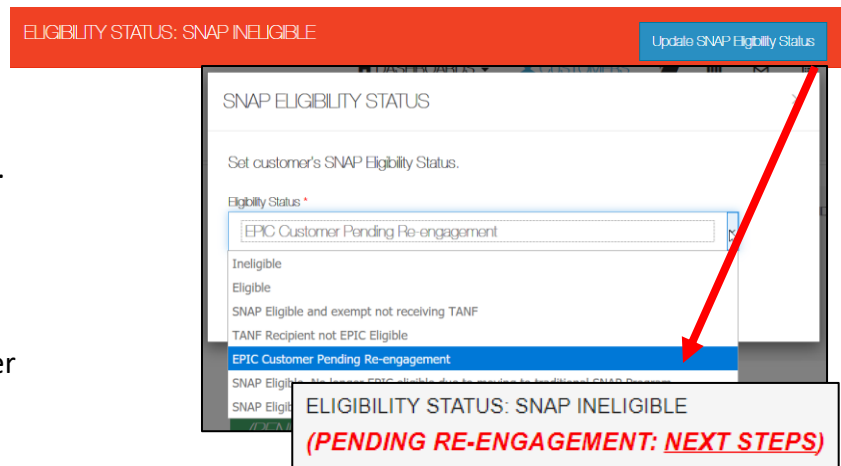
## Rescheduling Customers for Re-engagement with CBO

Mandatory EPIC customers, who are not being engaged by a CBO, will need to be rescheduled for re-engagement. There are three different situations where a customer may need to be realigned, depending on the customer's prior engagement level.

### Situation 1 – Rescheduling Customers Who Have Not Been Engaged By A CBO

Customers, not previously engaged by a CBO, will have a 2151 uploaded marked with “No Contact.” These customers will display on the Enrolled Dashboard under the “Referral Pending - No Contact from Customer / Recommend Conciliation” row. To reschedule a customer, whom was not previously engaged with a CBO, follow these steps:

1. At the top of the page, **click Dashboard**, then **select the Enrolled** tab.
2. **Click the number** associated with the “Referral Pending - No Contact from Customer / Recommend Conciliation” row.
3. A list will show the participants associated with that specific selection. **Select the Progress** option of the customer you wish to reschedule.
4. **Mark** (DHS EPIC Admin Team) the customer as “EPIC Customer Pending Re-engagement” on the customer’s Progress page, using the drop-down that pops up when clicking “Update SNAP Eligibility Status”.
5. DHS will call the customer for an appointment to determine if they are still SNAP eligible.
6. After meeting/speaking with the customer, update the SNAP Eligibility Status by marking the appropriate status.
7. Next you will schedule their re-engagement appoint by **selecting the Schedule Appointment** blue box.
8. From the populated list of appointments, **choose** an appointment date.
9. Under the Assignment Forms, **click the Download Referral Form** link. Print a copy to give to the customer.
10. **Select the View More Appointments** to see if the customer has been scheduled any other CBO Initial Intake Appointments.



## Situation 2 – Re-engaging Customers Following A Sanction

To reschedule a customer, whom previously was engaged with a CBO, the DHS Admin Team will mark the customer as “EPIC Customer Pending Re-engagement”. A tag will appear on the customer’s current eligibility status – “**Pending Re-engagement**”.

1. **Mark** (DHS EPIC Admin Team) the customer as “EPIC Customer Pending Re-engagement” on the customer’s Progress page, using the drop-down that pops up when clicking “Update SNAP Eligibility Status”.
2. All items will remain on the Progress page.
3. DHS will call the customer for an appointment to determine if they are still SNAP eligible.
4. After meeting/speaking with the customer, mark the appropriate status. The CBO will complete the other steps on the Progress page.
5. DHS may reschedule the customer from the Progress page > Initial CBO Appointment – 2151 Upload.
  - a. **Select** the **Schedule Appointment** blue box.
  - b. From the list of populated appointments, **select** an appointment date.
  - c. Under the Assignment Forms, **select** the **Download Referral Form** link. Print a copy to give to the customer. A copy will automatically upload to the customer’s Progress page for historical record.

**Select** the **View More Appointments** to see if the customer has any other CBO Initial Intake Appointments scheduled.

## Situation 3 – Aligning Customers With A New CBO And Scheduling Re-Engagement Appointment

Customers, who request a different CBO during the re-engagement appointment with DHS, will need to be realigned with a new CBO before an appointment can be scheduled. To realign and schedule a customer with a new CBO:

1. Use the customer’s **Eligibility Review** page to determine the CBO and training program for the customer’s realignment.
2. Send [EPIC@illinoisworknet.com](mailto:EPIC@illinoisworknet.com) an email to have the customer changed to a new CBO and training program. Include the customer’s **other participant ID number**, the **new CBO**, and **training program** for which the customer wishes to be realigned.
3. Once a customer has been realigned, DHS may reschedule the customer from either the Profile > Assignment tab **OR** from the customer’s Progress page > Initial CBO Appointment – 2151 Upload Section.
  - a. **Select** the **Progress page** tab.
  - b. **Select** the **Schedule Appointment** blue box.
  - c. From the list of populated appointments, **select** an appointment date.
  - d. Under the Assignment Forms, **select** the **Download Referral Form** link. Print a copy to give to the customer. A copy will automatically upload to the customer’s Progress page for historical record.

**Select** the **View More Appointments** to see if the customer has been scheduled any other CBO Initial Intake Appointments.

## Per Policy

- How many times does an agency have to re-engage a customer who has shown they do not want to take part in the program?
  - DHS policy does not stipulate a number of times for reengagement.
  - The customer should continue to be reengaged and the DHS Conciliation Process should be followed per policy.
    - PM 21-06-09
- How many times does the agency have to re-engage a customer who has successfully completed the program and retention period?
  - Customers, who complete the program and are successful, should not be re-engaged.
  - Customers, who complete the program and lose their employment, should be re-engaged.
  - Customers, who complete the program and quit their employment, should not be re-engaged. These customers would be ineligible for benefits if they refuse suitable employment.
    - PM 21-06-10b, Sanction Reason-Discontinuing suitable employment, including quitting a job after placement and before cancellation without good cause.
- If an Epic customer is receiving unemployment benefits and exempt, are they still eligible to participate in EPIC?
  - Yes, as long as they are still eligible and receiving SNAP benefits.