Contents

Overview 1
Purpose: 1
Who Enters/Maintains Data 2
Access Customer Profile Page 2
How is the IEP/Case Management organized? 2
IEP/Case Management Sections 3
Overview 3
Review Assessments 4
Set Goals 5
Add Activities/Services in ISETS E&T Programs 6
Build a Plan 7
Service/Activity Level Information (Not Worksite Placements) 8
Status 8
Service Provider 8
Dollar Value 9
Overrides 10
IDHS Override Response 11
Attendance 13
Earned Credentials 13
Service/Activity Level Information (Worksite Placements) 14
Status 14
Attendance 15
Customer Services Report 16

Overview

Purpose:

The IEP/Case Management is a case management tool service providers can use with their customers to:

- Review assessment results
- Create goals based on assessment results
- Identify steps/services needed to achieve those goals and,
- Document status and flags when intervention is needed.

Highlights:

- Customer information submitted during the application process is used to populate the IEP/Case Management/Career Plan.
- The provider reviews the information and identifies recommended next steps that include start/end dates, status, notes, associate cost and earned credentials (when applicable upon successful completion of the credential).
- The service provider adds recommended steps/services by selecting from a list of steps/services.

Who Enters/Maintains Data

Only staff and customers that have been given access to the program can view the IEP/Case Management.

- Statewide User Roles- Statewide staff view/edit IEP/Case Management for all customers.
- Program Manager, Intermediary, and Provider Partners - Staff can view/edit IEP/Case Management for customers in their assigned partner locations.
- Customers- Customers can access their information from their program tools located in My Dashboard.

Access Customer Profile Page

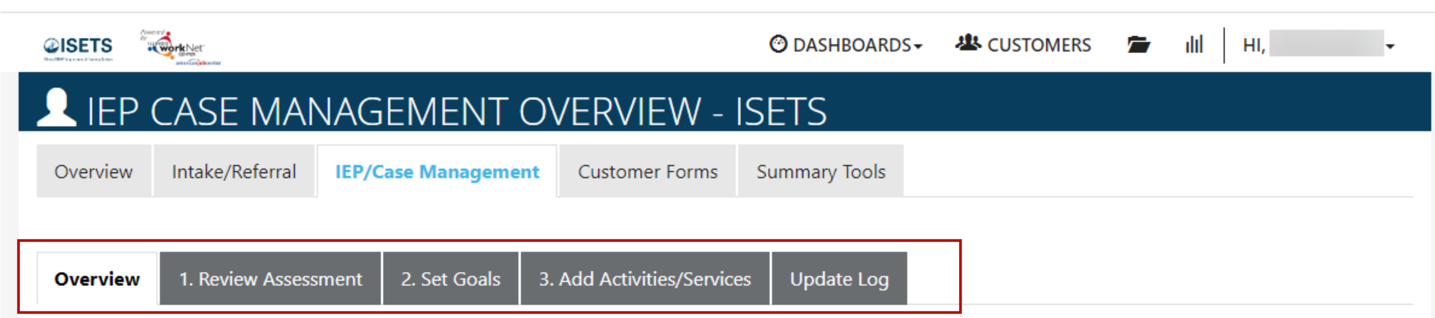
1. Log into www.illinoisworknet.com.
2. Select My Dashboard.
3. Select Partner Tools.
4. Select the icon for ISETS. Partner lands on the customer list.
5. Select the customer's name to access their information.
6. Select the IEP/Case Management tab.

Shortcut Tip:

Go to www.illinoisworknet.com/ISETSPartners. Select the link for ISETS Partner Tools.

How is the IEP/Case Management organized?

The Main IEP/Case Management Navigation



Overview provides a summary view of assessments, career goals, accomplishments, and the steps to achieve their goals.

1. Review Assessments provides assessment results that are saved in Illinois workNet and an area to write a summary of the assessment results.

2. Set Goals provides an area to identify goals and categorize them as short/long term, type, and status. Prepopulated goals and steps can be added.
3. Add Activity/Services provides system generated recommended services/steps and can be added to the plan after the initial services have been added in the Enrollment process.
4. Update Log - provides a log of IEP/Case Management updates and upload for customer IEP/Case Management agreements.

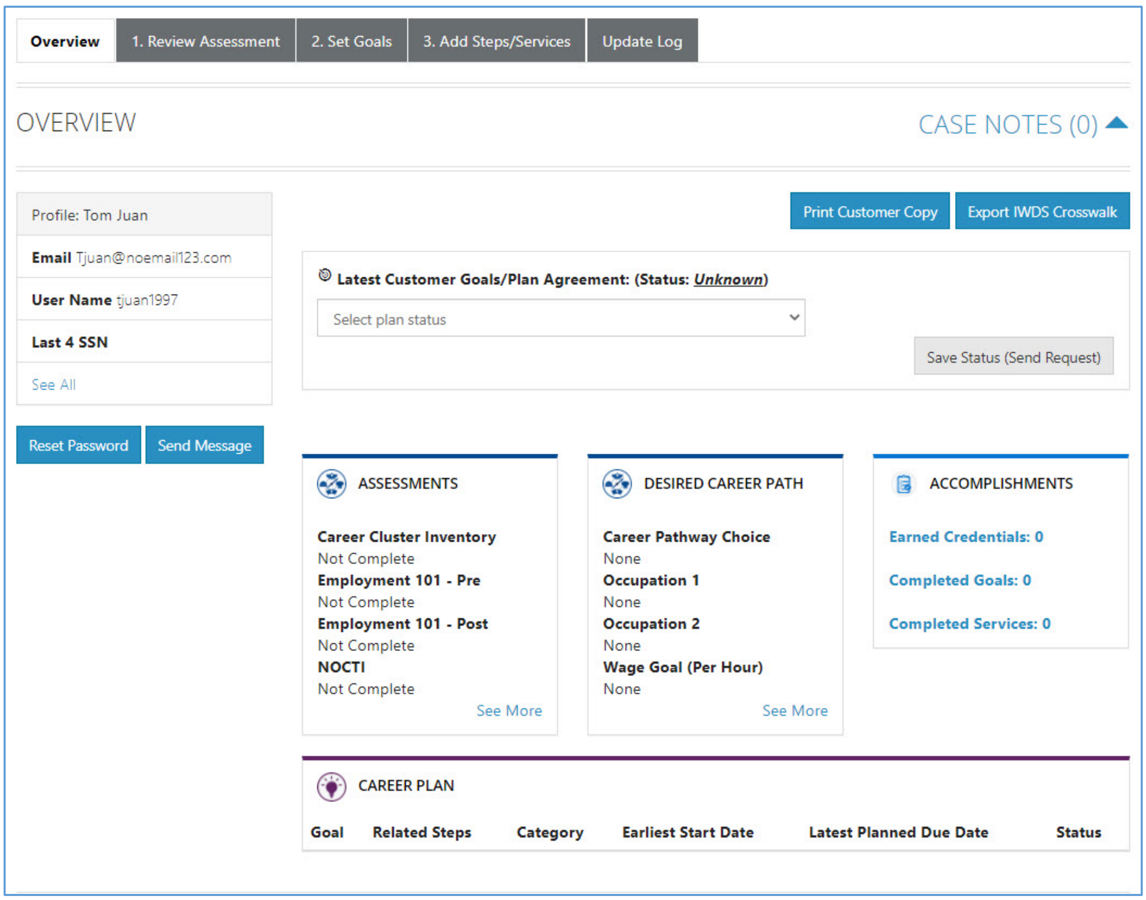
IEP/Case Management Sections

Overview

Case Notes allows career planners/partner to enter case notes to document changes, updates, and other notes.

Overview provides a:

- Summary of customer information



Customer Goal/Plan Agreement – This section provides the evidence that the customer participated in the development of their IEP/Case Management. Use the print customer copy button and have the customer sign the bottom of the document. Then upload the agreement to the IEP/Case Management.

The customer will be required to agree to the plan changes when a goal is added or marked as off track. The customer will have a customer view where they can login and click agree. The provider partner may also upload a signed copy. If the provider partner cannot reach the customer, they will be able to select that option.

Assessments view a high level of completed assessments. Click the See More to review additional assessment information.

Desired Career Path is part of the Employment Goal assessment. Click the See More to edit the career goal information. This information can be updated at any time.

Accomplishments provides a quick count of earned credentials, completed goals, and completed services that link to a list of those items.

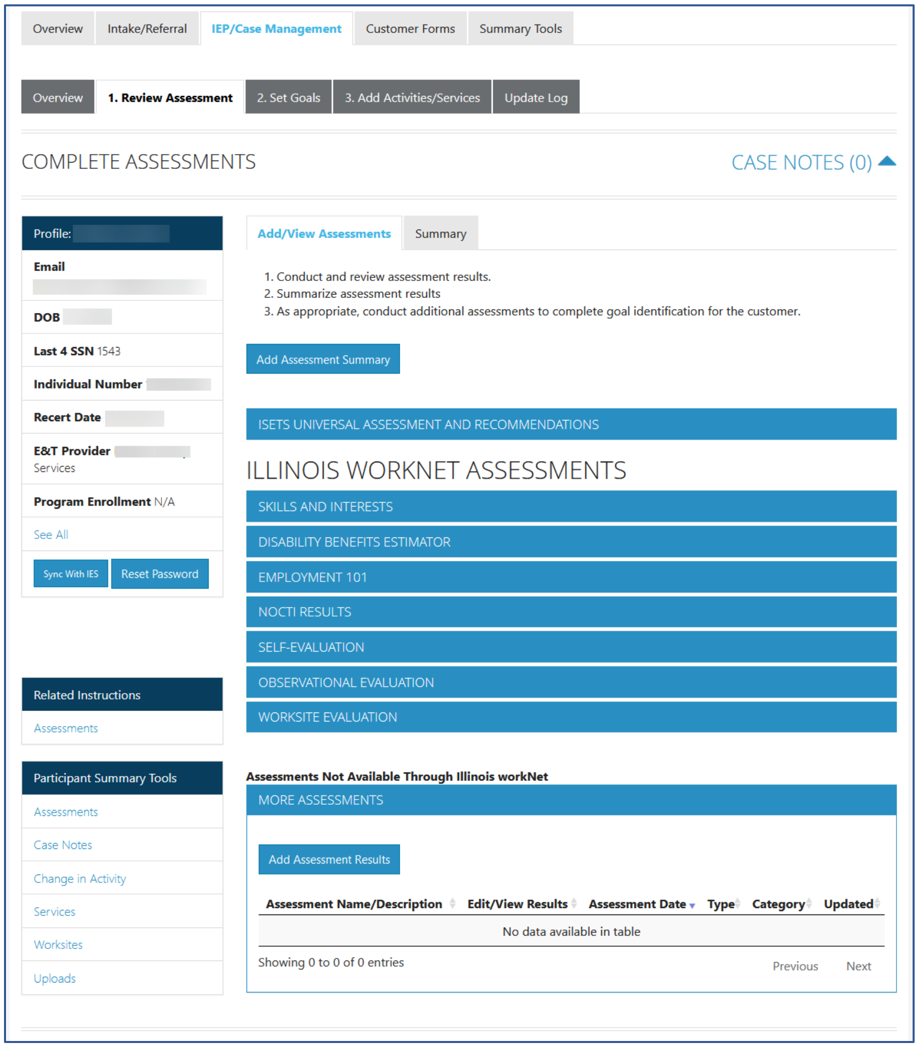
Career Plan (Pre-populated Goals/Steps) are associated with performance measures and are automatically added to a customer file. These can be updated with the current status or marked as Evaluated/Not required. See more information in Customer Services Report.

The IEP/Case Management section is organized by goals. It includes a list of the steps/services associated with each goal. The start and end dates for the goals are automatically generated by the steps/service for that goal. Goal status is set by the provider partner and is used to identify not started, on track, off track, or complete.

Review Assessments

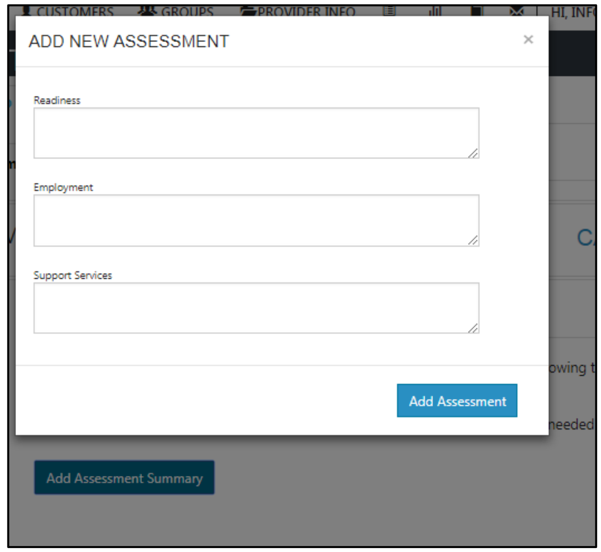
It is important to complete assessments to identify customer skills, interests, goals, and barriers. Some of this information is collected when the customer completes the initial assessment. This information is saved in the ISETS Universal Assessment and Recommendations section.

1. Go through each of the assessment sections.
2. Add an Assessment Summary. Saved assessment summaries are available in the Assessment History link.



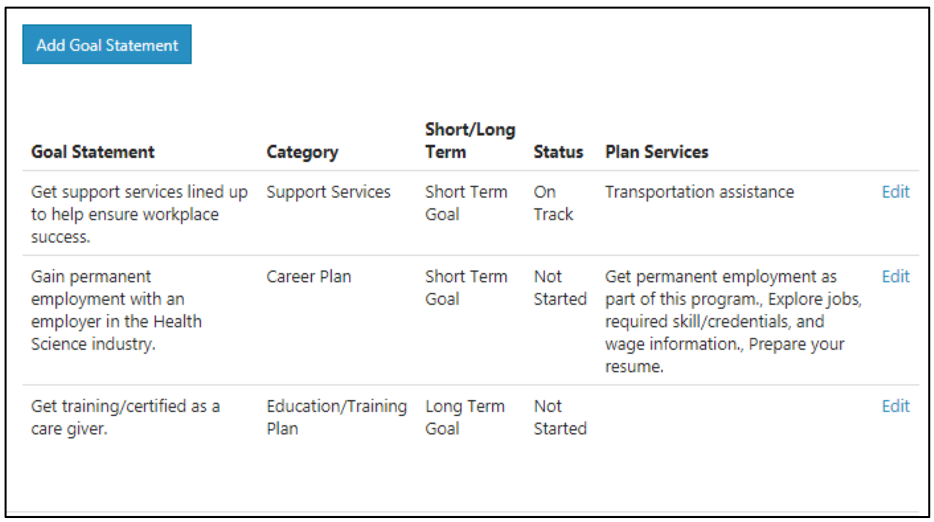
Set Goals

Goals should be written so they address barriers, employment goals, education/training, and related stackable credentials that can be earned to advance the customer through their career pathway. Goals should be realistic, measurable, and attainable.



Use completed assessments as a resource to discuss and develop goals with the customer. The customer will need to agree to the overall initial plan. If customer goals are added or marked as off track, the customer will need to agree to the update.

1. Select Set Goals tab and add a goal statement.
2. Enter a goal statement that is 144 characters or less.
3. Select a category (Support Services, Career Plan, Education/Training Plan).
4. Identify if the goal is a short term or long-term goal.
5. Set goal status.
   - Not Started = This status is the default setting. The career planner should update when the customer has started working towards this goal
   - On Track = The customer is continuing to progress through the steps in this section of the plan at an acceptable rate.
   - Off Track = The customer is not progressing through the steps in this section of the plan at an acceptable rate. *(Coming soon enhancement - A notification is sent to the customer to let them know the plan has been as off track and the career planner would like to work with them to help them get back on track.)*
   - Complete = The career planner has verified the customer has completed this section of the plan.

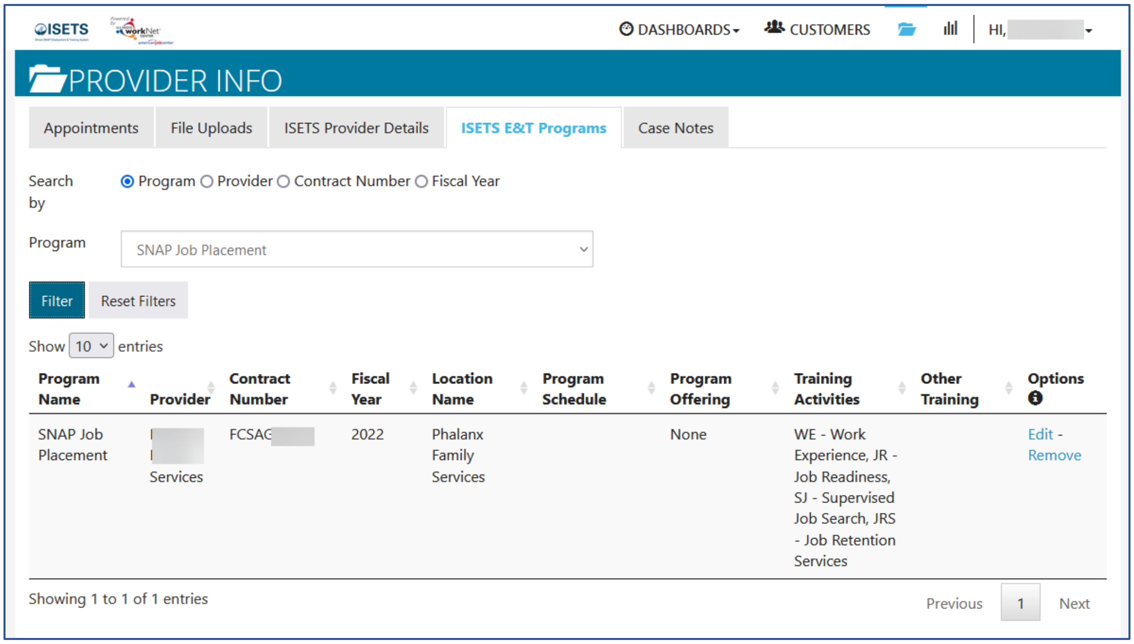


Add Goal Statement

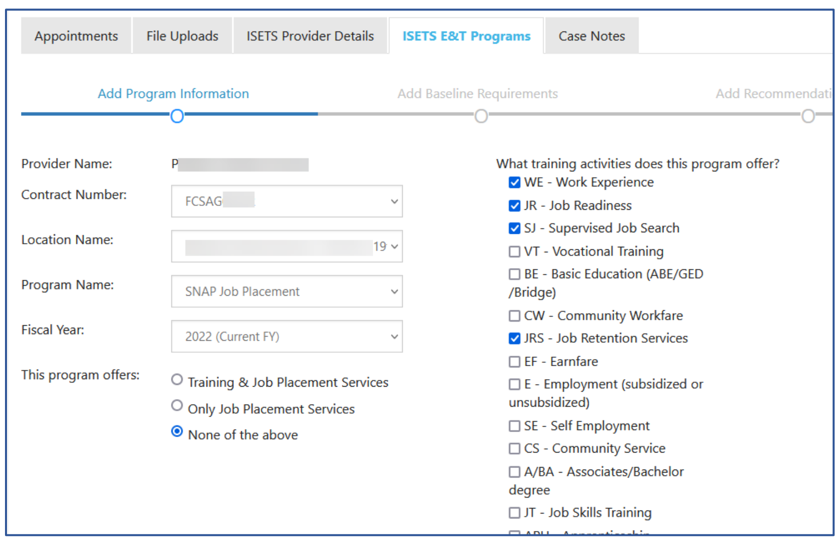
Goal Statement	Category	Short/Long Term	Status	Plan Services	
Get support services lined up to help ensure workplace success.	Support Services	Short Term Goal	On Track	Transportation assistance	Edit
Gain permanent employment with an employer in the Health Science industry.	Career Plan	Short Term Goal	Not Started	Get permanent employment as part of this program., Explore jobs, required skill/credentials, and wage information., Prepare your resume.	Edit
Get training/certified as a care giver.	Education/Training Plan	Long Term Goal	Not Started		Edit

Add Activities/Services in ISETS E&T Programs

Services are added by contract agreement. The agency's program manager would make these updates.

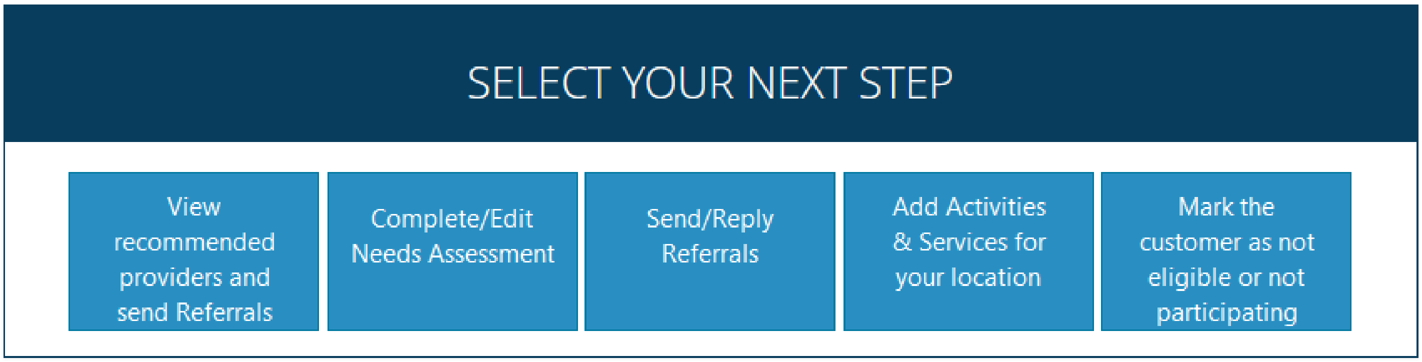


1. In the ISETS system select Provider Information tab. (Icon is a folder.)
2. Select the ISETS Provider Details. To update the program details, select the ISETS E&T Programs.
3. Select the EDIT button at the far-right side. The program will be added by a program administrator. Check all applicable boxes for the Services/Activities provided in the grant to which your agency is assigned. These are the services that are available to add to customer IEP/Case Management along with Support Services and Referrals to Support Services.
4. Complete all aspects of the program information including skills and interests. This is what will match participants with the provider programs.
5. Click Save at the end.

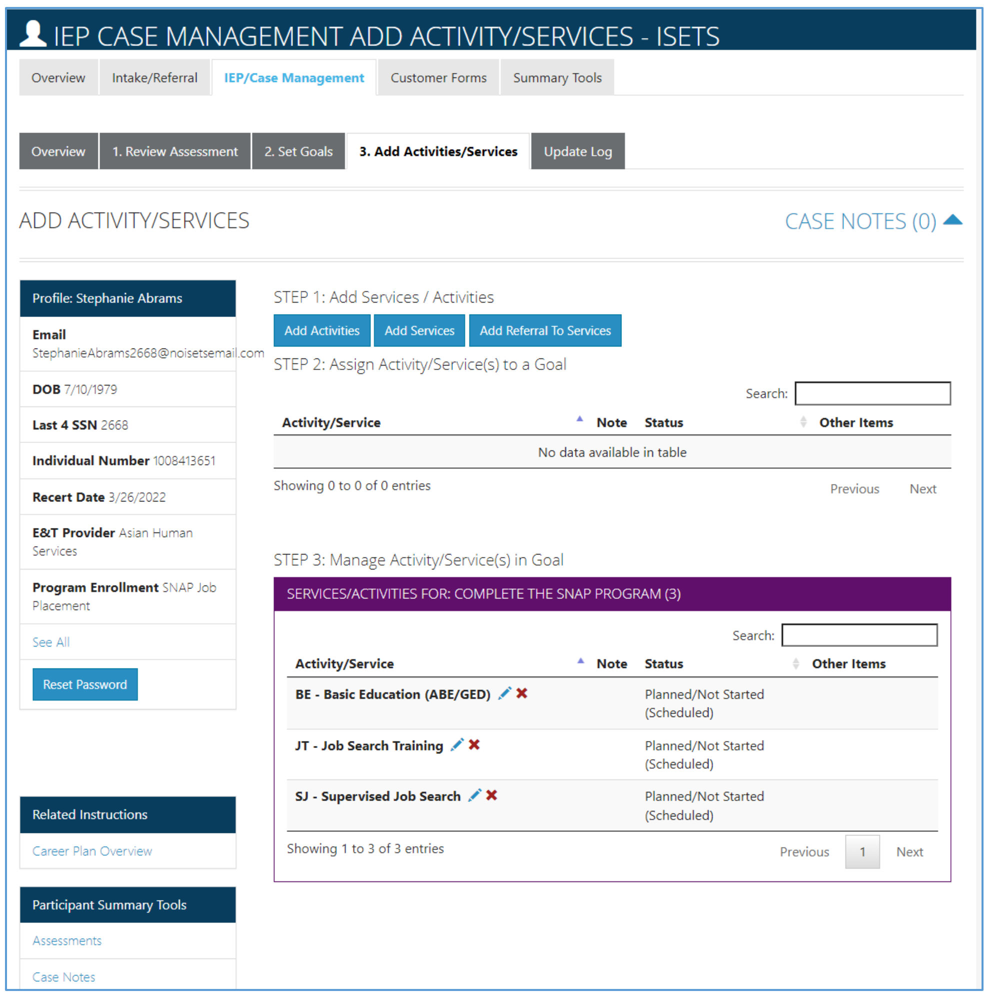


Build a Plan

Activities and Services are added on the Intake/Referral tab of the customer profile by selecting Add Activities & Services for your location buttons. After at least one service is added and the customer is enrolled (See Intake and Enrollment instructions), the partner is redirected to Step 3 of the IEP/Case Management.



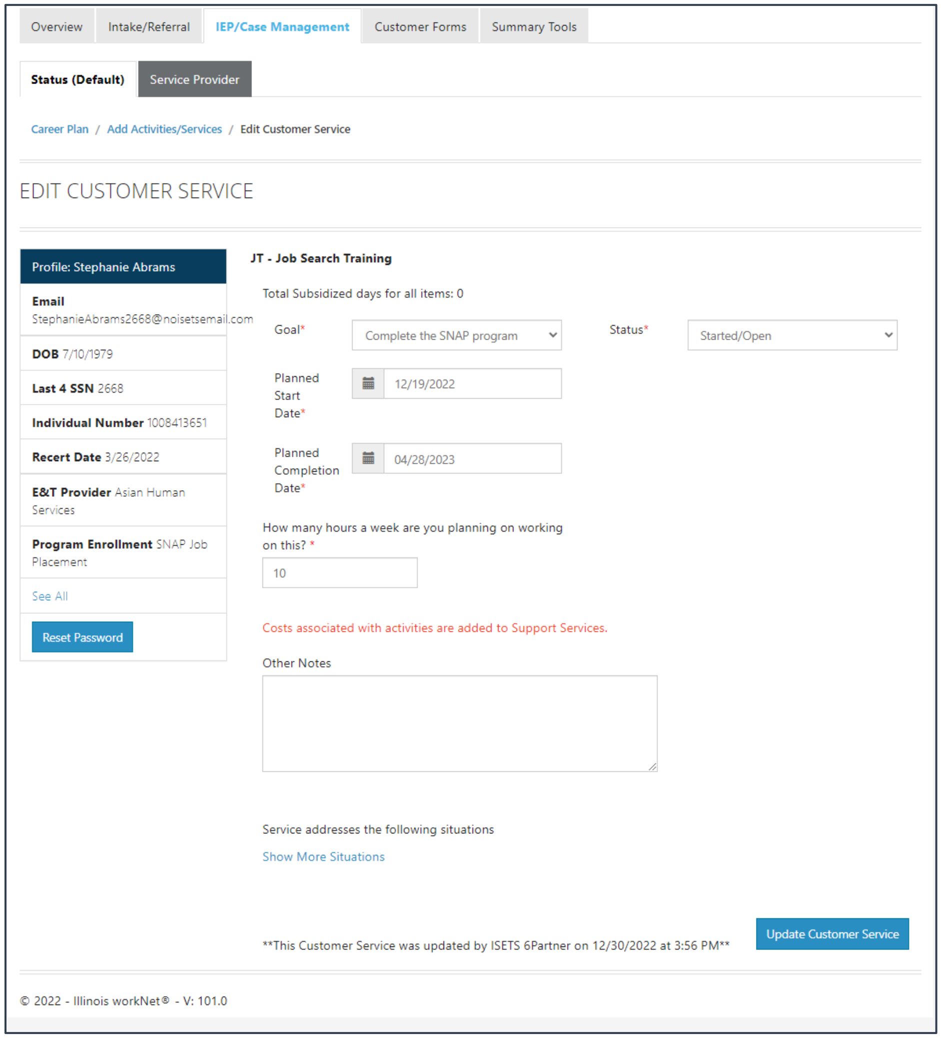
1. Select the purple box Steps for: Complete Program to see the activities or services added for the participant.
2. Select the appropriate blue button to add an Activity, Support service or Referral services to the IEP/Case Management.
3. Click the pencil to update the activity/service as instructed below.



Service/Activity Level Information (Not Worksite Placements)

Status

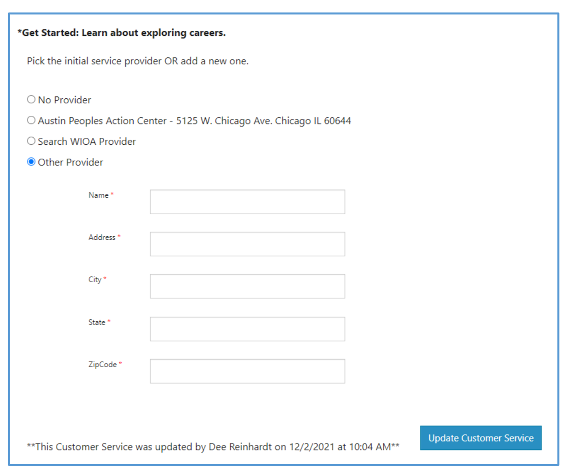
All services include the related goal, status, start date, weekly hours, WIOA funded (answer no for this project), notes, and related barriers. A completion date is required if the status is complete.



Service Provider (location of service)

Identify who is providing the service. The grantee will be the default provider. If the grantee is not providing the service, enter the provider information. A service provider must be selected for group attendance to be entered or for an individual to enter their own attendance.

- The provider will be the default provider. If a different provider is providing the services for the step/activity, select from a list of WIOA providers, or add another provider.
- A provider is required for the participant to enter their own attendance or for group attendance to be entered.
- Update Customer Service.



Dollar Value

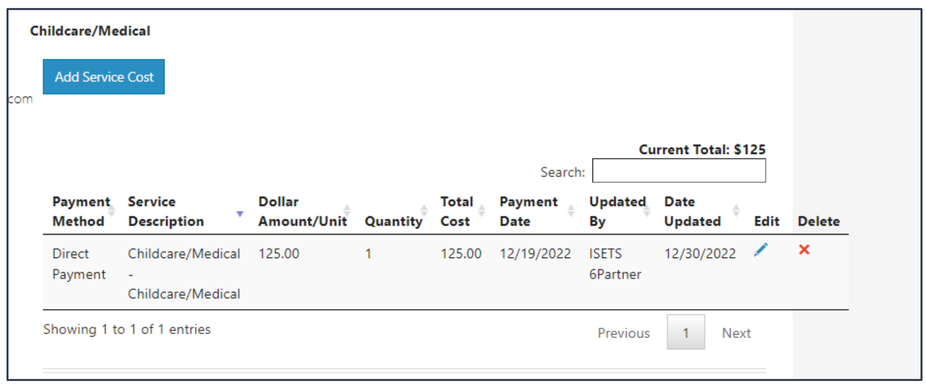
Can only be entered on Support Services in ISETS. Enter the dollar amount related to the service. Do not use this as payroll upload. Those costs should be added via payroll upload. Service must have a goal and be "Started/Open" before dollar value may be added. All items are prescribed by the current WAG.

Track in this section:

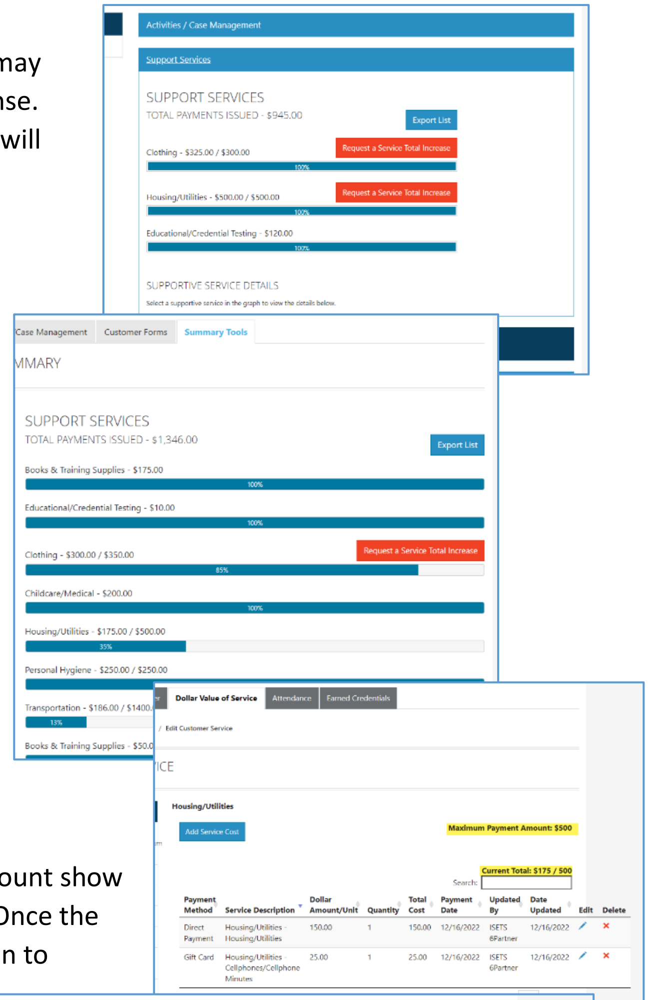
- Select service type
- Select subtype
- Select method of payment,
- Enter start date of payment,
- Enter cost of that payment,
- Enter number of times you provided the payment on that date,
- Select from where the funds are coming.
- Save.

To add additional items, select Edit pencil from the table. Add an additional occurrence with a new date and save.

Only one support service can be open and active at a time.



Overrides



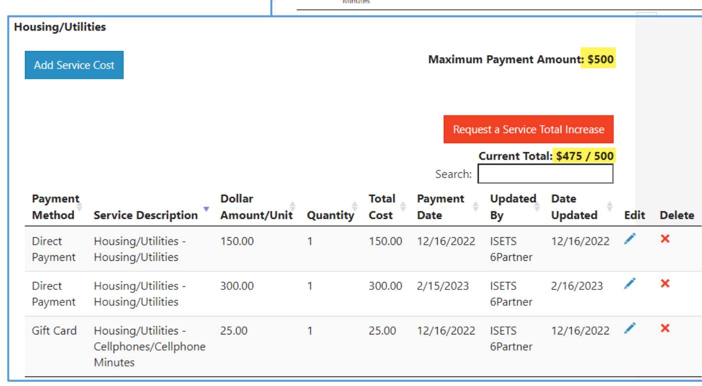
All items are prescribed by the current WAG. Sometimes a participant may require additional monies for an item with a maximum allowable expense. Partners may submit an override request. The override request button will automatically be available once the service amount is within $50 of the maximum.

Access the override request:

- On the Overview tab – Support Services Section
- On the Summary Tools tab
- On the service Dollar Value of Summary tab.

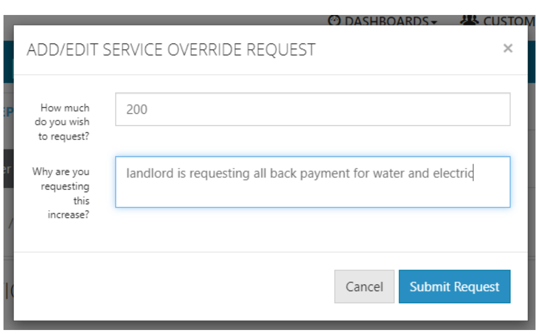
All avenues return to the actual service in the IEP/Case Management section.

Add service costs as directed above. Service items with a maximum amount show that amount, along with the current total compared to the maximum. Once the dollar value reaches within $50 of the maximum amount, the red button to Request a Service Total Increase displays.



Follow these steps:

- Click the Request a Service Total Increase button.
- Enter the dollar amount requested for the increase.
- Enter the reason for the dollar amount increase.
- Click submit request.



Service Override Requests display on a separate table.

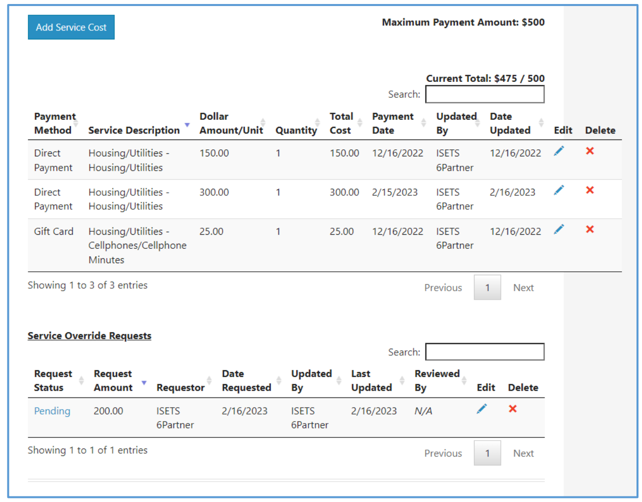
While the request is pending, another request for this service may not be initiated.

Before IDHS staff approve the override request:

Select Pending to view the details of the request.

Select the pencil to edit the request.

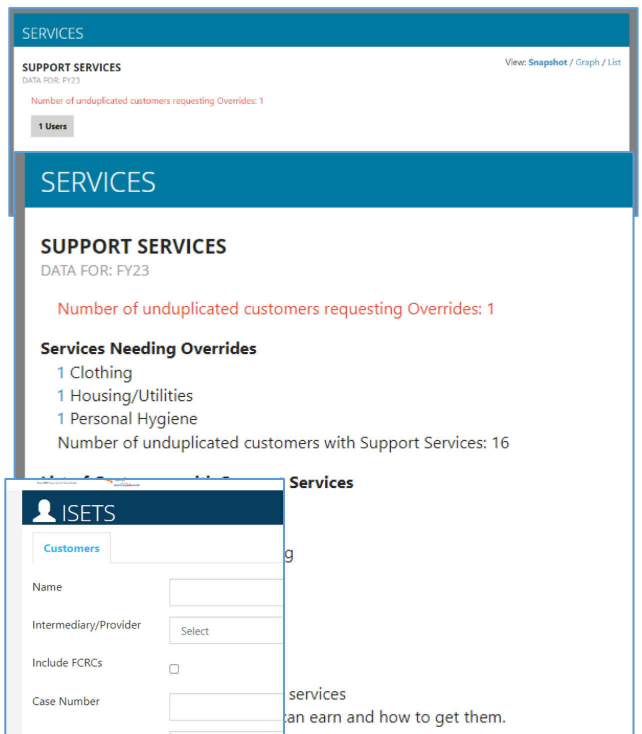
Once a request is approved, the button will display again for additional override requests when the total reaches $50 from the maximum.



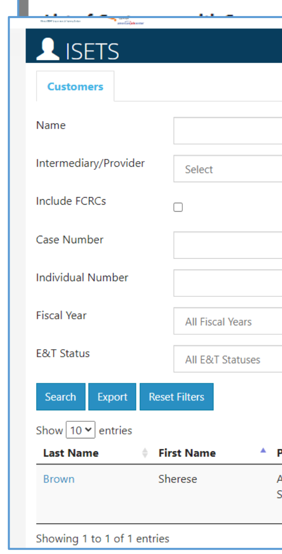
IDHS Override Response

From the ISETS dashboard:

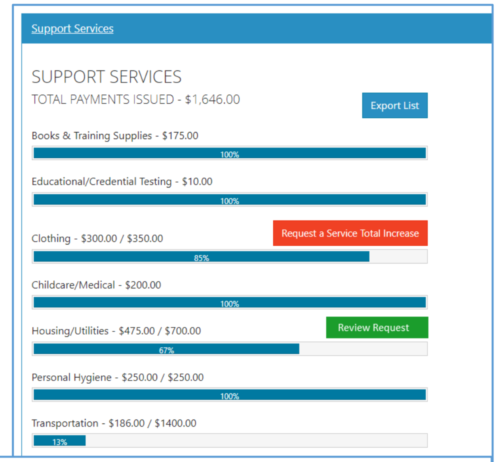
- Scroll to the Services section.
- Select List view in the upper right corner.
- Click the number next to the service item that requires an override.



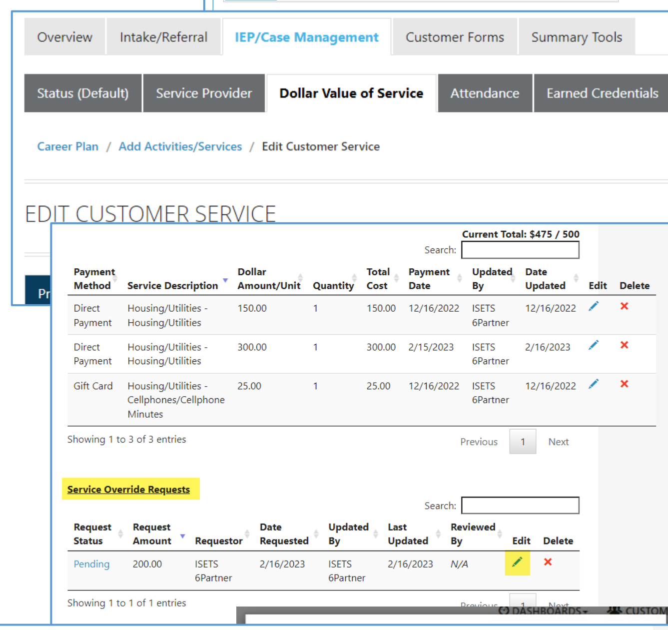
- Click the last name on the customer list that displays to access the customer profile.
- From the Support Service on the Overview or Summary Tools tab click the Review Override button



- Click the Dollar Value of Service tab on the activity.



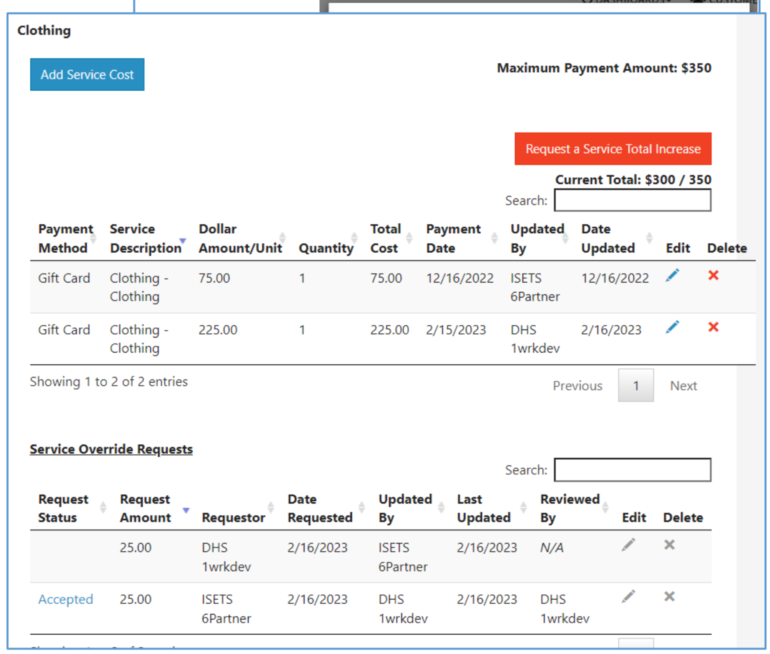
- Click the pencil on the pending request.



- Select Approved or Rejected in the Status.
- Click Respond to Request

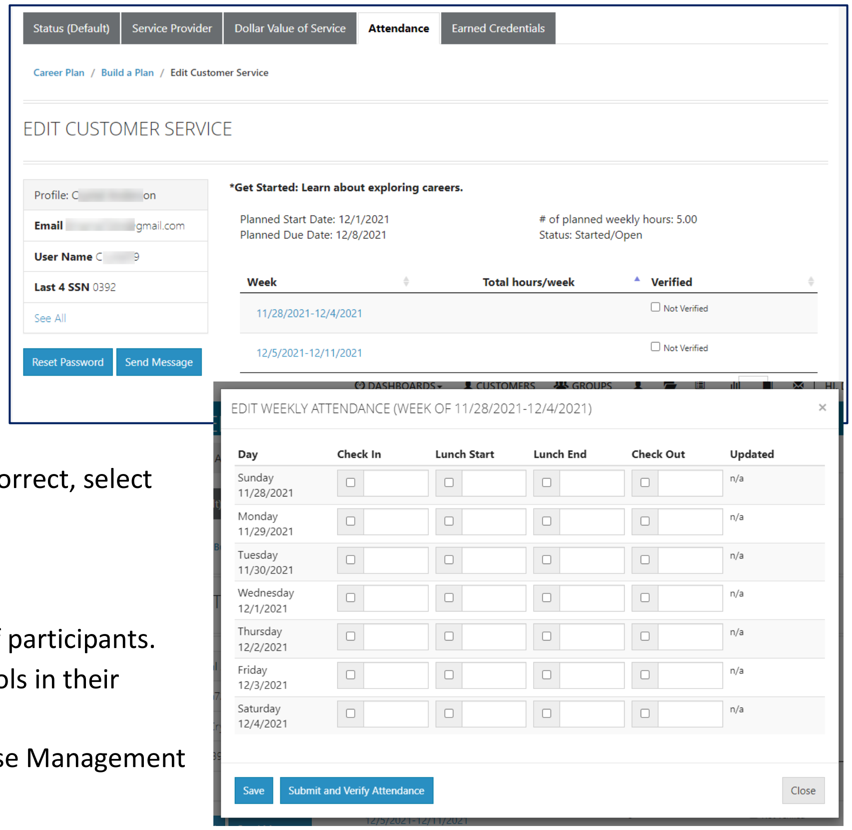
Upon completion of the request review,

- The Maximum payment amount will show an increased amount,
- The Current Total will show the new maximum amount,
- The request button will display if current total is within $50 of maximum,
- The override requests will show in the table but will not be editable,
- Previous requests may be viewed by clicking the request status.



Attendance

This feature allows you to track the attendance of the participant for this activity.

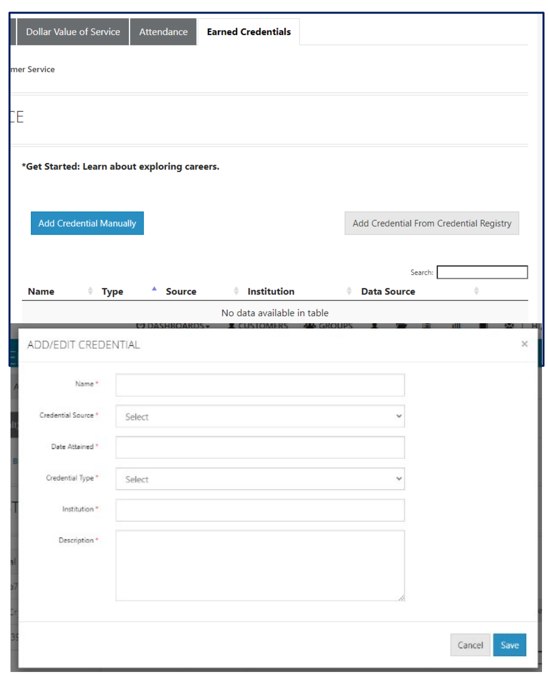


- Service must be Started/Open with a start date and planned end date.
- Select the attendance tab.
- Select the week for which attendance is to be tracked.
- Enter the time for check-in, lunch, and check-out for each day.
- Save, or if the person entering the information can verify the attendance is correct, select Submit and Verify Attendance.

- Attendance may also be entered for groups of participants.
- Individuals may enter attendance from the tools in their personal account.
- Attendance may be accessed from the IEP/Case Management or the Overview page.

Earned Credentials

This feature allows you to add credentials earned by the participant for this activity.



- Select Add the credential manually, OR Add Credential from Credential Registry.
- Complete all the fields when adding a credential manually. Credential Source and Type provide drop-down lists from which to select. Credential date requires an 8 digit date i.e. 03/03/2023
- Save. This will also add credentials to any outcome tabs associated with a participant file.

Service/Activity Level Information (Worksite Placements)

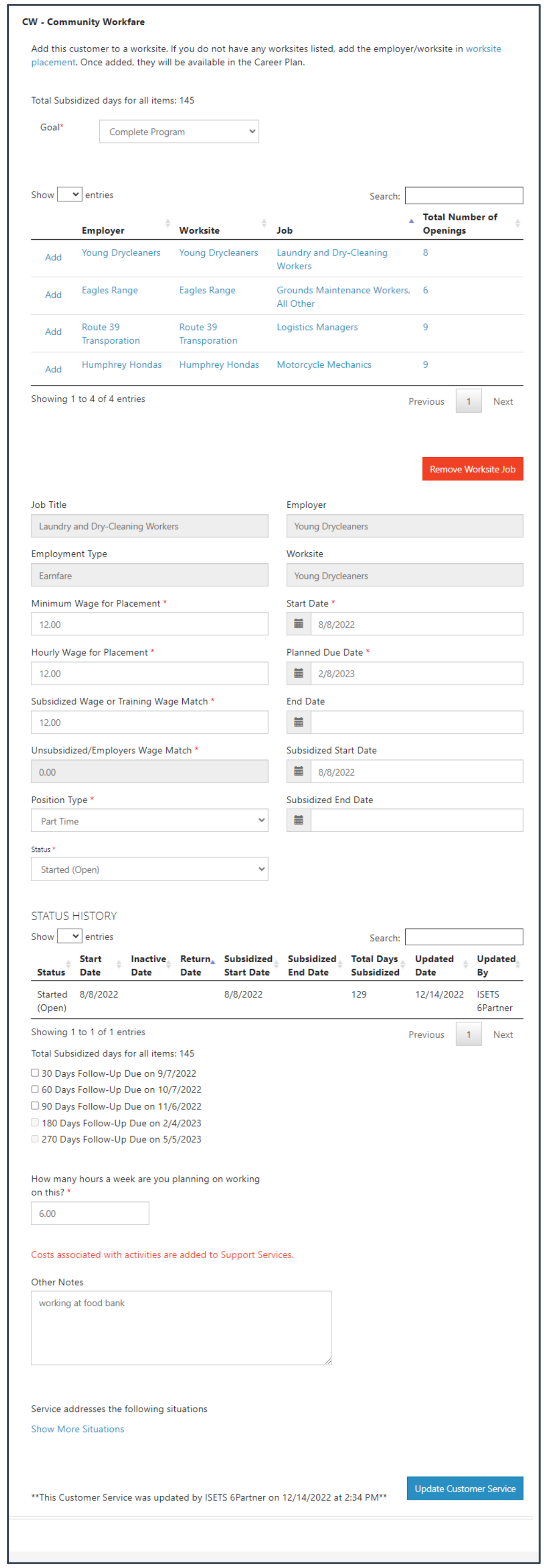
Notes:

- Before entering worksite placements into the IEP/Case Management, make sure that all employers and worksites have been identified in the worksite placement tool.
- Adding the customer to a worksite using the IEP/Case Management will populate the worksite placement tool tracking of positions taken.
- If needed, payroll can be uploaded in worksite placement.

Status

This type of activity includes worksite placement fields:

- Select Add to add the customer and enter the following information:
  - Minimum wage for placement based on state minimum wage.
  - Hourly wage will be prepopulated with the information that was entered with the job. Hourly wage must be equal to or greater than minimum wage.
    - Enter the subsidized wage.
      - The subsidized wage should be no more than the minimum wage.
      - On Earnfare, customer only receives 6 months of subsidized wages per calendar year.
  - Days in subsidized employment is listed with each placement.
  - Select the type of position.
    - Full-time.
    - Part-time.
  - Select a Status.
    - Planned/Not Started – No subsidized days tracking happens with this status.
    - Started (Open) – The start date begins the time limit for the subsidized wage.
    - Successful completion – ends subsidized wage counting.
    - Unsuccessful completion – ends subsidized wage counting.
  - Enter in the Start Date.
- Follow-up can be tracked at 30, 60, and 90 days. The follow-up section will be available/activated once each of the



timeframes have been met. When the customer reaches each of these milestones, review the information for accuracy, update the subsidized wage as needed, and select that you have verified employment.

- Days in subsidized employment – tracks from all positions entered in the IEP/Case Management, i.e. if one job has 35 days and another has 13 days, the Days in Subsidized will show 48 days. The job with recent dates will have the most current count.

Attendance

Use the attendance tool to track work hours. See the instructions above.

ISETS Activities and Services

In order to be active in SNAP E&T a customer MUST have a SNAP E&T activity in Started/Open status. A customer can only be enrolled in Support Services or Other E&T Activities if they are also enrolled in a SNAP E&T Activity.

SNAP E&T Activities

BE - Basic Education (ABE/GED)
CW - Community Workfare
ELA - English Language Acquisition
INT - Internship
JR - Job Retention
JST - Job Search Training
OJT - On-the-Job Training
SJS - Supervised Job Search
TJ - Transitional Job
VT - Vocational Training
WRT - Work Readiness Training

Support Services

Books & Training Supplies
Childcare/Medical
Clothing
Educational/Credential Testing
Housing/Utilities
Personal Hygiene
Transportation

Other E&T Activities

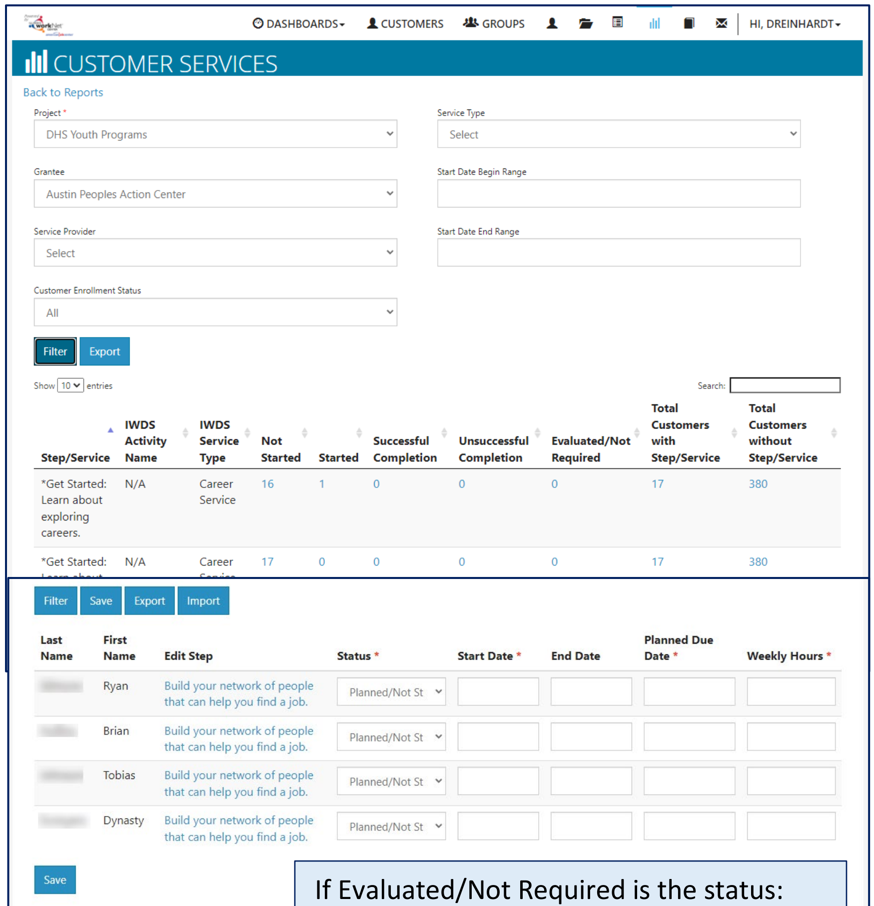
A/BA - Associates/Bachelor degree
CS - Community Service
E - Employment (subsidized or unsubsidized)
SE - Self Employment
SET - Self-Employment Training

Referrals to other Services

Referral to Childcare/Medical services
Referral to clothing provider
Referral to Domestic Abuse Counseling
Referral to Drug/Alcohol Rehabilitation Counseling
Referral to homelessness counseling provider
Referral to Housing and Utilities support
Referral to personal hygiene services
Referral to transportation services

Customer Services Report

The Customer Services Report is a way to update multiple participants services/activities at one time. This is especially useful if a cohort of individuals are working through a series of services as a group and the participants all have the same dates associated with a step or service.



- Select Reports (bar graph icon in the Customer Support Center menu.)
- Select the appropriate filters
- Select Filter
- All services associated with any participant will show in the list of services.
- Select a number in one of the status columns to see a list of the participants who are included.
- Move through the list of participants by selecting the status; entering a start date, planned due date, and weekly hours.
- Statuses may be different for each participant when saving.
- Save. When the list is refreshed, the participants should then show in the appropriate column based upon the status saved in the step/service/activity.

If Evaluated/Not Required is the status:

- Use the same date for Start Date and Planned Due Date.
- Enter 0 weekly hours