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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

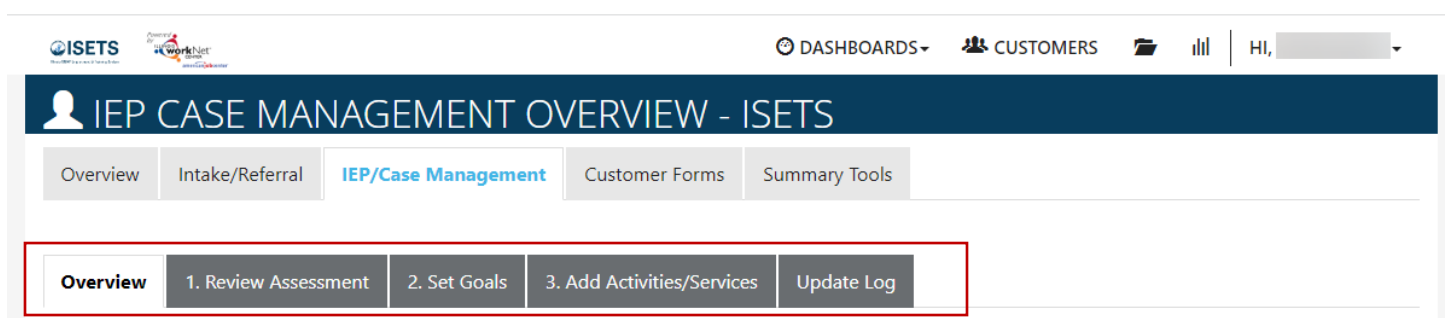
1. Log into www.illinoisworknet.com.
2. Select **My Dashboard**.
3. Select **Partner Tools**.
4. Select the icon for **ISETS**. Partner lands on the customer list.
5. Select the **customer's name** to access their information.
6. Select the **IEP/Case Management** tab.

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

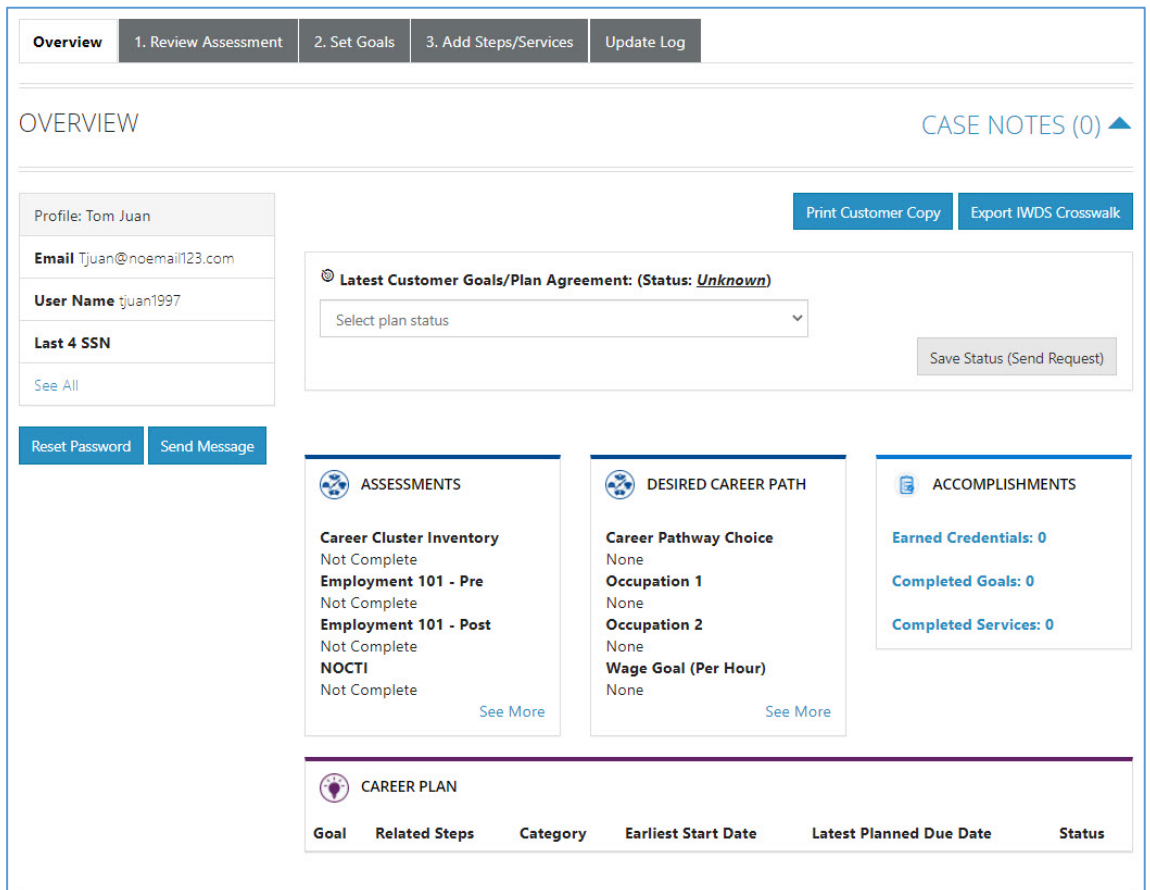
Customer Goal/Plan Agreement – This section provides the evidence that the customer participated in the development of their IEP/Case Management. Use the **print customer copy button** and have the customer sign the bottom of the document. Then upload the agreement to the IEP/Case Management.

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.



The screenshot shows the 'Overview' section of the IEP/Case Management system. At the top, there are navigation tabs: 'Overview', '1. Review Assessment', '2. Set Goals', '3. Add Steps/Services', and 'Update Log'. The main heading is 'OVERVIEW' with a 'CASE NOTES (0)' link on the right. Below this, there is a profile card for 'Tom Juan' with fields for Email (tjuan@noemail123.com), User Name (tjuan1997), and Last 4 SSN. There are buttons for 'Reset Password' and 'Send Message'. To the right of the profile card are buttons for 'Print Customer Copy' and 'Export IWDS Crosswalk'. Below the profile card is a section for 'Latest Customer Goals/Plan Agreement' with a status of 'Unknown', a dropdown menu for 'Select plan status', and a 'Save Status (Send Request)' button. The main content area is divided into three columns: 'ASSESSMENTS' (listing Career Cluster Inventory, Employment 101 - Pre, Employment 101 - Post, and NOCTI, all marked as 'Not Complete'), 'DESIRED CAREER PATH' (listing Career Pathway Choice, Occupation 1, Occupation 2, and Wage Goal (Per Hour), all marked as 'None'), and 'ACCOMPLISHMENTS' (listing Earned Credentials: 0, Completed Goals: 0, and Completed Services: 0). At the bottom, there is a 'CAREER PLAN' section with a table header: Goal, Related Steps, Category, Earliest Start Date, Latest Planned Due Date, and Status.

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

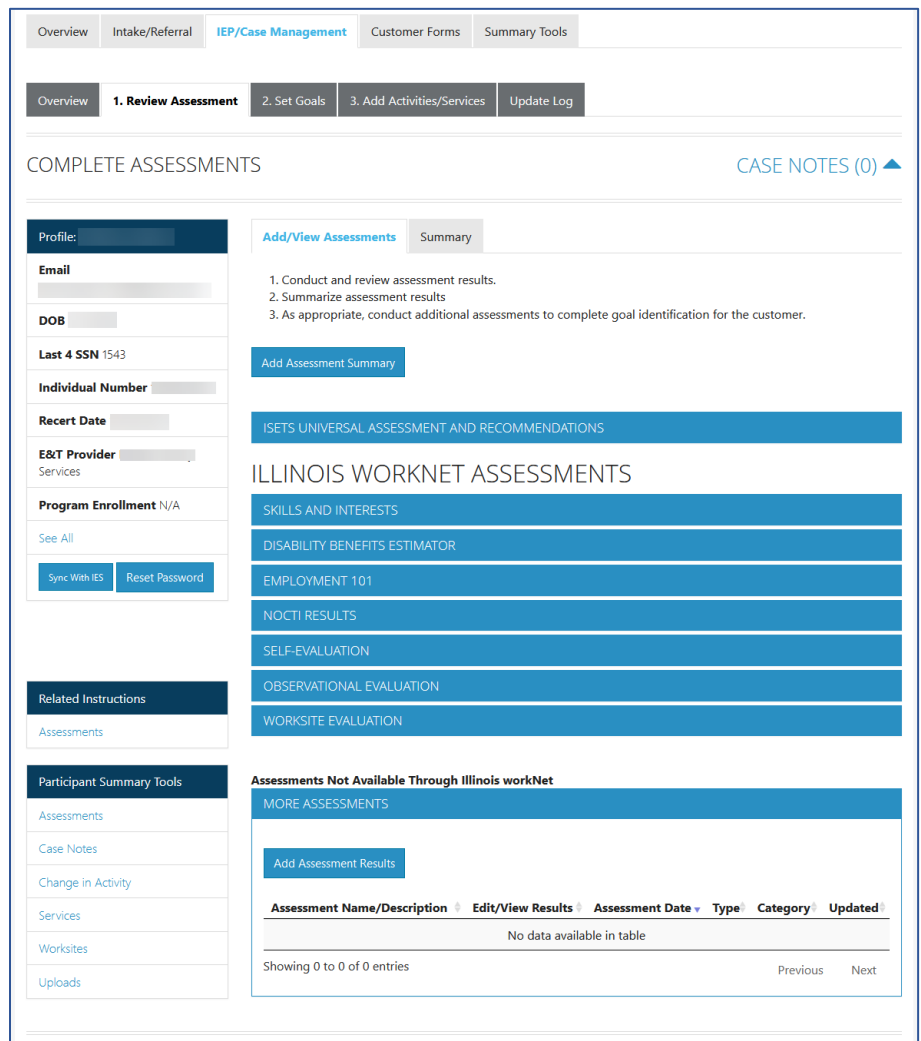
Career Plan (Pre-populated Goals/Steps) are associated with performance measures and are automatically added to a customer file. These can be updated with the current status or marked as Evaluated/Not required. See more information in Customer Services Report.

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.



The screenshot shows the 'IEP/Case Management' section of the software. At the top, there are navigation tabs: Overview, Intake/Referral, **IEP/Case Management**, Customer Forms, and Summary Tools. Below these are sub-tabs: Overview, **1. Review Assessment**, 2. Set Goals, 3. Add Activities/Services, and Update Log.

The main content area is titled 'COMPLETE ASSESSMENTS' with a 'CASE NOTES (0)' link on the right. On the left, there is a 'Profile' section with fields for Email, DOB, Last 4 SSN (1543), Individual Number, Recert Date, E&T Provider (Services), and Program Enrollment (N/A). There are also 'Sync With IES' and 'Reset Password' buttons.

Below the profile is a 'Related Instructions' section with a link to 'Assessments'. Underneath is a 'Participant Summary Tools' section with links for Assessments, Case Notes, Change in Activity, Services, Worksites, and Uploads.

The main content area has two sub-sections: 'Add/View Assessments' and 'Summary'. The 'Add/View Assessments' section contains a list of steps: 1. Conduct and review assessment results, 2. Summarize assessment results, and 3. As appropriate, conduct additional assessments to complete goal identification for the customer. There is an 'Add Assessment Summary' button.

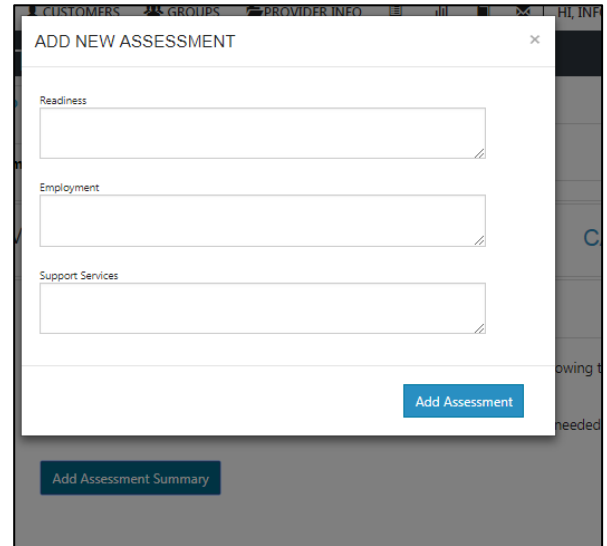
The 'Summary' section is titled 'ILLINOIS WORKNET ASSESSMENTS' and lists several assessment categories: SKILLS AND INTERESTS, DISABILITY BENEFITS ESTIMATOR, EMPLOYMENT 101, NOCTI RESULTS, SELF-EVALUATION, OBSERVATIONAL EVALUATION, and WORKSITE EVALUATION.

Below this is a section titled 'Assessments Not Available Through Illinois workNet' with a 'MORE ASSESSMENTS' link and an 'Add Assessment Results' button. At the bottom, there is a table with columns: Assessment Name/Description, Edit/View Results, Assessment Date, Type, Category, and Updated. The table currently shows 'No data available in table' and 'Showing 0 to 0 of 0 entries'.

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 set to 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.

Program Name	Provider	Contract Number	Fiscal Year	Location Name	Program Schedule	Program Offering	Training Activities	Other Training	Options
SNAP Job Placement	[Redacted]	FCSAG	2022	Phalanx Family Services		None	WE - Work Experience, JR - Job Readiness, SJ - Supervised Job Search, JRS - Job Retention Services		Edit - Remove

Add Program Information

Provider Name: P [Redacted]

Contract Number: FCSAG

Location Name: [Redacted] 19

Program Name: SNAP Job Placement

Fiscal Year: 2022 (Current FY)

This program offers:

- Training & Job Placement Services
- Only Job Placement Services
- None of the above

What training activities does this program offer?

- WE - Work Experience
- JR - Job Readiness
- SJ - Supervised Job Search
- VT - Vocational Training
- BE - Basic Education (ABE/GED/Bridge)
- CW - Community Workfare
- JRS - Job Retention Services
- EF - Earnfare
- E - Employment (subsidized or unsubsidized)
- SE - Self Employment
- CS - Community Service
- A/BA - Associates/Bachelor degree
- JT - Job Skills Training
- ABU - Associate's

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.

SELECT YOUR NEXT STEP

View recommended providers and send Referrals

Complete/Edit Needs Assessment

Send/Reply Referrals

Add Activities & Services for your location

Mark the customer as not eligible or not participating

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.

IEP CASE MANAGEMENT ADD ACTIVITY/SERVICES - ISETS

Overview
Intake/Referral
IEP/Case Management
Customer Forms
Summary Tools

Overview
1. Review Assessment
2. Set Goals
3. Add Activities/Services
Update Log

ADD ACTIVITY/SERVICES

Profile: Stephanie Abrams

Email
StephanieAbrams2668@noisetsemail.com

DOB 7/10/1979

Last 4 SSN 2668

Individual Number 1008413651

Recert Date 3/26/2022

E&T Provider Asian Human Services

Program Enrollment SNAP Job Placement

See All

Reset Password

STEP 1: Add Services / Activities

Add Activities
Add Services
Add Referral To Services

STEP 2: Assign Activity/Service(s) to a Goal

Activity/Service	Note	Status	Other Items
No data available in table			

Showing 0 to 0 of 0 entries Previous Next

STEP 3: Manage Activity/Service(s) in Goal

SERVICES/ACTIVITIES FOR: COMPLETE THE SNAP PROGRAM (3)

Activity/Service	Note	Status	Other Items
BE - Basic Education (ABE/GED)		Planned/Not Started (Scheduled)	
JT - Job Search Training		Planned/Not Started (Scheduled)	
SJ - Supervised Job Search		Planned/Not Started (Scheduled)	

Showing 1 to 3 of 3 entries Previous 1 Next

Related Instructions

Career Plan Overview

Participant Summary Tools

Assessments

Case Notes

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

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.

Overview
Intake/Referral
IEP/Case Management
Customer Forms
Summary Tools

Status (Default)
Service Provider

[Career Plan](#) / [Add Activities/Services](#) / [Edit Customer Service](#)

EDIT CUSTOMER SERVICE

Profile: Stephanie Abrams

Email
StephanieAbrams2668@noisetsemail.com

DOB 7/10/1979

Last 4 SSN 2668

Individual Number 1008413651

Recert Date 3/26/2022

E&T Provider Asian Human Services

Program Enrollment SNAP Job Placement

[See All](#)

Reset Password

JT - Job Search Training

Total Subsidized days for all items: 0

Goal* Complete the SNAP program **Status*** Started/Open

Planned Start Date* 12/19/2022

Planned Completion Date* 04/28/2023

How many hours a week are you planning on working on this? * 10

Costs associated with activities are added to Support Services.

Other Notes

Service addresses the following situations
[Show More Situations](#)

This Customer Service was updated by ISETS 6Partner on 12/30/2022 at 3:56 PM

Update Customer Service

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Pick the initial service provider OR add a new one.

No Provider
 Austin Peoples Action Center - 5125 W. Chicago Ave. Chicago IL 60644
 Search WIOA Provider
 Other Provider

Name *
Address *
City *
State *
ZipCode *

This Customer Service was updated by Dee Reinhardt on 12/2/2021 at 10:04 AM

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.

Childcare/Medical

[Add Service Cost](#)

Current Total: \$125

Search:

Payment Method	Service Description	Dollar Amount/Unit	Quantity	Total Cost	Payment Date	Updated By	Date Updated	Edit	Delete
Direct Payment	Childcare/Medical	125.00	1	125.00	12/19/2022	ISETS	12/30/2022		
	Childcare/Medical					6Partner			

Showing 1 to 1 of 1 entries

Previous **1** Next

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.

Status (Default) | Service Provider | Dollar Value of Service | **Attendance** | Earned Credentials

Career Plan / Build a Plan / Edit Customer Service

EDIT CUSTOMER SERVICE

Profile: C...on

Email: ...@gmail.com

User Name: C...@...

Last 4 SSN: 0392

[See All](#)

[Reset Password](#) [Send Message](#)

***Get Started: Learn about exploring careers.**

Planned Start Date: 12/1/2021
Planned Due Date: 12/8/2021

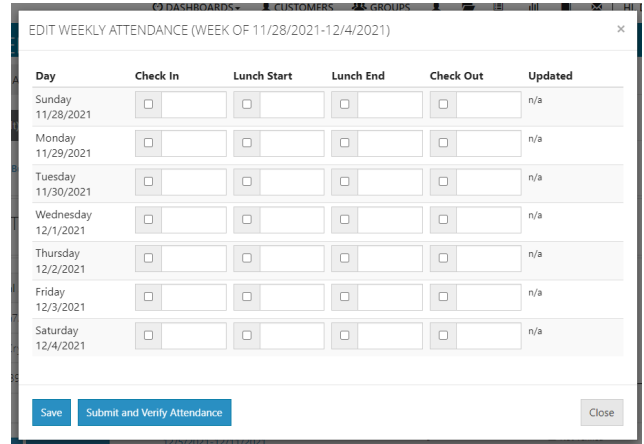
of planned weekly hours: 5.00
Status: Started/Open

Week	Total hours/week	Verified
11/28/2021-12/4/2021		<input type="checkbox"/> Not Verified
12/5/2021-12/11/2021		<input type="checkbox"/> Not Verified

Showing 1 to 2 of 2 entries

Previous **1** Next

- **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.

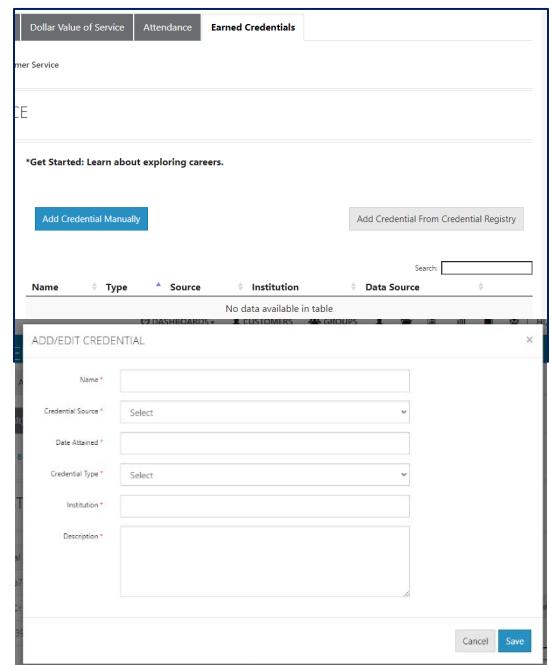


Day	Check In	Lunch Start	Lunch End	Check Out	Updated
Sunday 11/28/2021	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	n/a
Monday 11/29/2021	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	n/a
Tuesday 11/30/2021	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	n/a
Wednesday 12/1/2021	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	n/a
Thursday 12/2/2021	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	n/a
Friday 12/3/2021	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	n/a
Saturday 12/4/2021	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	n/a

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.



Dollar Value of Service | Attendance | **Earned Credentials**

*Get Started: Learn about exploring careers.

Add Credential Manually | Add Credential From Credential Registry

Name	Type	Source	Institution	Data Source
No data available in table				

Search:

ADD/EDIT CREDENTIAL

Name *
 Credential Source *
 Date Attained *
 Credential Type *
 Institution *
 Description *

Cancel Save

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.
 - 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 – The subsidized wage 90-day time period will not begin with this status.
 - Started (Open) – The start date begins the time limit for the subsidized wage.
 - Successful completion.
 - Unsuccessful completion.
- Enter in the Start.
- **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

CW - Community Workfare

Add this customer to a worksite. If you do not have any worksites listed, add the employer/worksite in worksite placement. Once added, they will be available in the Career Plan.

Total Subsidized days for all items: 145

Goal*

Show entries Search:

	Employer	Worksite	Job	Total Number of Openings
Add	Young Drycleaners	Young Drycleaners	Laundry and Dry-Cleaning Workers	8
Add	Eagles Range	Eagles Range	Grounds Maintenance Workers, All Other	6
Add	Route 39 Transportation	Route 39 Transportation	Logistics Managers	9
Add	Humphrey Hondas	Humphrey Hondas	Motorcycle Mechanics	9

Showing 1 to 4 of 4 entries Previous Next

[Remove Worksite Job](#)

Job Title Employer

Employment Type Worksite

Minimum Wage for Placement * Start Date *

Hourly Wage for Placement * Planned Due Date *

Subsidized Wage or Training Wage Match * End Date

Unsubsidized/Employers Wage Match * Subsidized Start Date

Position Type * Subsidized End Date

Status *

STATUS HISTORY

Show entries Search:

Status	Start Date	Inactive Date	Return Date	Subsidized Start Date	Subsidized End Date	Total Days Subsidized	Updated Date	Updated By
Started (Open)	8/8/2022			8/8/2022		129	12/14/2022	ISETS 6Partner

Showing 1 to 1 of 1 entries Previous Next

Total Subsidized days for all items: 145

30 Days Follow-Up Due on 9/7/2022

60 Days Follow-Up Due on 10/7/2022

90 Days Follow-Up Due on 11/6/2022

180 Days Follow-Up Due on 2/4/2023

270 Days Follow-Up Due on 5/5/2023

How many hours a week are you planning on working on this? *

Costs associated with activities are added to Support Services.

Other Notes

Service addresses the following situations [Show More Situations](#)

This Customer Service was updated by ISETS 6Partner on 12/14/2022 at 2:34 PM [Update Customer Service](#)

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.

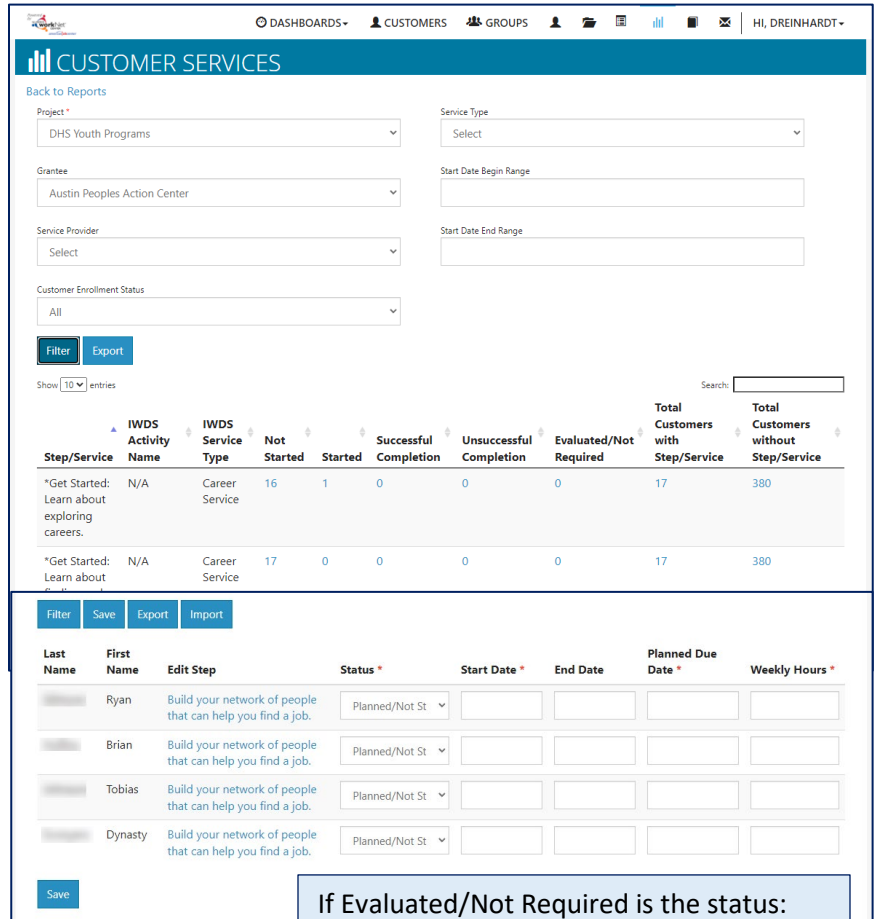
Attendance

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

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.



CUSTOMER SERVICES

Back to Reports

Project *
DHS Youth Programs

Service Type
Select

Grantee
Austin Peoples Action Center

Start Date Begin Range

Service Provider
Select

Start Date End Range

Customer Enrollment Status
All

Filter Export

Show 10 entries

Step/Service	IWDS Activity Name	IWDS Service Type	Not Started	Started	Successful Completion	Unsuccessful Completion	Evaluated/Not Required	Total Customers with Step/Service	Total Customers without Step/Service
*Get Started: Learn about exploring careers.	N/A	Career Service	16	1	0	0	0	17	380
*Get Started: Learn about	N/A	Career Service	17	0	0	0	0	17	380

Filter Save Export Import

Last Name	First Name	Edit Step	Status *	Start Date *	End Date	Planned Due Date *	Weekly Hours *
	Ryan	Build your network of people that can help you find a job.	Planned/Not St				
	Brian	Build your network of people that can help you find a job.	Planned/Not St				
	Tobias	Build your network of people that can help you find a job.	Planned/Not St				
	Dynasty	Build your network of people that can help you find a job.	Planned/Not St				

Save

If Evaluated/Not Required is the status:

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