



ISETS

Illinois SNAP Employment & Training System

User Manual

For State SNAP E&T Staff



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*All images are fictional examples only and any resemblance to actual persons is coincidental only



Access to ISETS

ISETS is powered by Illinois workNet. This means that you will go to [ISETS](#) inside www.illinoisworknet.com and log into your Illinois workNet account. We suggest using Chrome or Edge. Internet Explorer is no longer supported.

If you already have an Illinois workNet account created, you would have received an ISETS/Illinois workNet username and password in your email.

If you do not know or remember your password, click on the forgot password link below the log-in information as shown to the right.

You can recover your password via email. If you do not receive the information, look for an email in your junk folder. If you have any issues, access the Help Request link found on the bottom of any page on Illinoisworknet.com. Indicate that you are a partner and need to regain access to your account.

ISETS Security

For security reasons, when you are logged into ISETS, screens are set to TIME-OUT after 30 minutes of inactivity. There is a 5-minute notification period during which time you can click on the screen to renew your activity. After the notification period you will be logged out. A best practice is to **close tabs when you are not using them**. If you have been logged out, enter your Illinois WorkNet/ISETS password and return to ISETS.

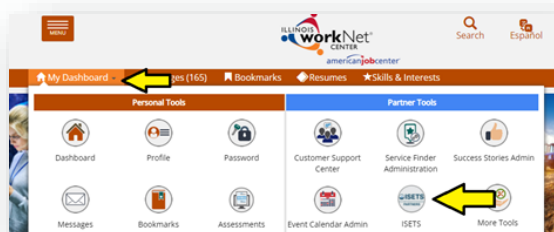
You are required to update your ISETS/ Illinois WorkNet password quarterly.

Accessing ISETS Tools

Once you are logged in, you can access the ISETS Dashboard and partner tools.

Option 1 – Use the direct link. If you use this option, you may want to bookmark the link. <https://apps.illinoisworknet.com/SiteAdministration/IDHSET/Admin/Index/>

Option 2 – Use the ISETS logo that is available in your Illinois workNet Dashboard Partner Tools.

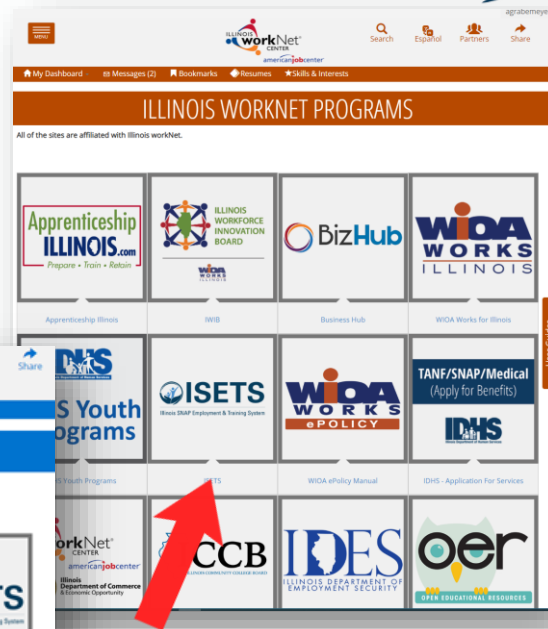
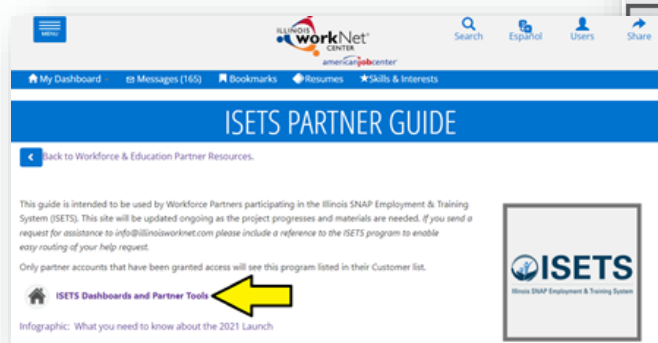




Option 3 – Use the ISETS tile located on the Illinois WorkNet Programs page.

Option 4 – Use link that is listed on the ISETS Partner Page:

(<https://www.illinoisworknet.com/isetspartners>)



The process to become an ISETS partner user:

1. In order to gain access to any IDHS data system your organization must have approval of a Security and Privacy Controls Questionnaire: please complete and submit an [SPCQ to DHS.ISETS.ACCESS](#). Providers may also need a Data Sharing Agreement depending on what access they require to different IDHS data systems. If your SPCQ has already been submitted and approved, proceed to step 2.
2. Each ISETS user must complete HIPAA and Security Awareness Training Modules and Attestations found at [IES Access and Support Center for External Partners](#). These are kept at the Partner agency.
3. Each ISETS user must complete a Confidentiality Agreement found at [IES Access and Support Center for External Partners](#). These are kept at the Partner agency also.
4. Providers must submit an initial user list saved as a Microsoft excel file with your organization's name in place of "Organization Name" in the file name. If you need to access a blank copy of this template, Provider Managers should ask their manager for a copy. If you have already submitted an initial user list, each subsequent user must be requested by submitting an IL444-2022 form (step 6)
5. IDHS staff will forward all forms to the correct department and once we have a final DHS signature, users will be uploaded into ISETS. Each user will receive a system generated notification once they have been added.
6. New users can be added after the initial user list by submitting a Help Request in ISETS. The requester must submit the IL444-2022 form and provide a birth date in their Help Request ticket. Instructions for submitting a Help Request are outlined in the "Where to get Help" section in this manual.



Access Forms:

[IDHS_SPCQ_v4.1_03.2018.pdf](#)

[IL444-2022.pdf](#)

[ISETS User List - Organization Name .pdf](#)

Please remember that if a Provider fails to notify IDHS of a user who is no longer employed with them, this could constitute a breach of their Data Sharing Agreement. Instruct your Providers to review their user list every few months to ensure it is up to date.

For IDHS Staff to gain access to the system, please have your manager submit a written request to dhs.isets.access@illinois.gov with your name, email address, phone number, zip code, birth date, and what role you need. The role you are assigned will determine what information you have access to.

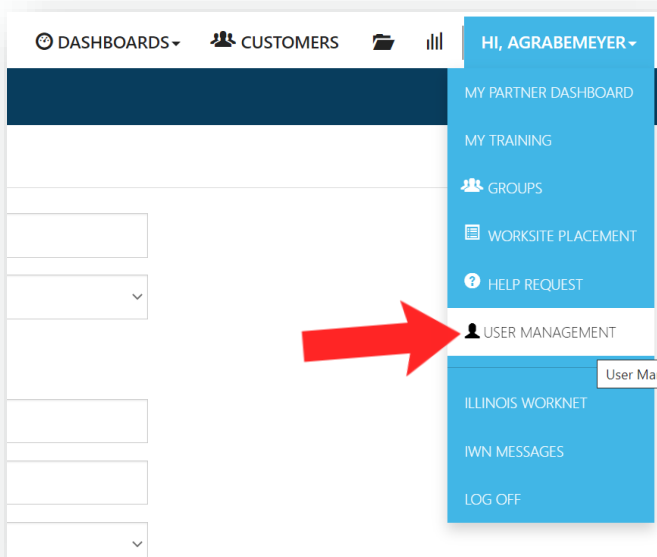
Provider Managers will also need to ensure that they have access to the Providers they are assigned to. While ISETS staff do their best to update this information periodically, it is your responsibility to ensure you have access to and are reviewing your Providers' data regularly. If you are reassigned to a different Provider, please email dhs.isets.access@illinois.gov immediately to update the list of Providers you have access to in ISETS.

Adding new Providers and New Users in ISETS (for Super Users)

IDHS staff are responsible for monitoring the DHS.ISETS.Access@illinois.gov mailbox and are responsible for adding new Providers and new users for existing providers. Providers may only be added if they have an executed contract with IDHS and have a current approved SPCQ.

Adding a new user in ISETS

1. Confirm that the organization has a current SPCQ approved.
2. Confirm that the IL444-2022 form is filled out and signed and that a DOB was provided.
3. In ISETS, click on the upper right-hand corner of the screen with your username and expand the dropdown menu. Choose "User Management".





4. Ensure that the user isn't already added to the system or listed with another organization by searching their name. Make sure to click the "Search" button; simply hitting "Enter" after typing into the system does not prompt a search.
5. If no user already exists, click on the "Add Partner to Group" button.

USER MANAGEMENT

Name: John smith

Related Instructions: User Management Instructions

Q Search Add Partner to Group

Hide Filters

Group: Select Role: Select

Show 10 entries

| Last Name | First Name | Username | Group | Email | IwN Role | LWIA | Add/Remove Partner |
|----------------------------|------------|----------|-------|-------|----------|------|--------------------|
| No data available in table | | | | | | | |

Showing 0 to 0 of 0 entries

Previous Next

6. A pop-up window with all the fields will appear.

7. Fill in all the fields and search for the organization in the last field. This organization name must begin with "ISETS" as with the highlighted option to the right.

ADD PARTNER

First Name * John

Last Name * Smith

Birth Date * 03/12/1978

Phone Number * 7732321671

Email * ISETS - Central States SER (SERCO)

ZIP Code * 60623

Search

No Account has been found with this information. Would you like to search non-active accounts?

Search Non-Active Accounts

Add Partner Close



8. If no account already exists in the Illinois Worknet system, you will receive a message like the one below. If this is the case, click on “Search Non-Active Accounts”.

Organizations or Groups to Add Partner to*

× ISETS - Central States SER (SERCO) Search

No Account has been found with this information. Would you like to search non-active accounts?

Search Non-Active Accounts

Add Partner Close

9. If an account already exists in the IWN system but not in ISETS you will see a message like the one below:

ADD PARTNER

First Name* John Last Name* Smith

Birth Date* 03/12/1978 Phone Number* 7732321671

Email* John.Smith@centralstatesser.org ZIP Code* 60623

Organizations or Groups to Add Partner to*

× ISETS - Central States SER (SERCO) Search

A match has been found based on the information provided.

| | |
|--------------------|---------------------------------|
| User Name: | JSmith2023 |
| Email: | John.Smith@centralstatesser.org |
| First Name: | John |
| Last Name: | Smith |
| Birthday: | 03/12/1978 |

Is this the correct account? Yes ☐ No ☐

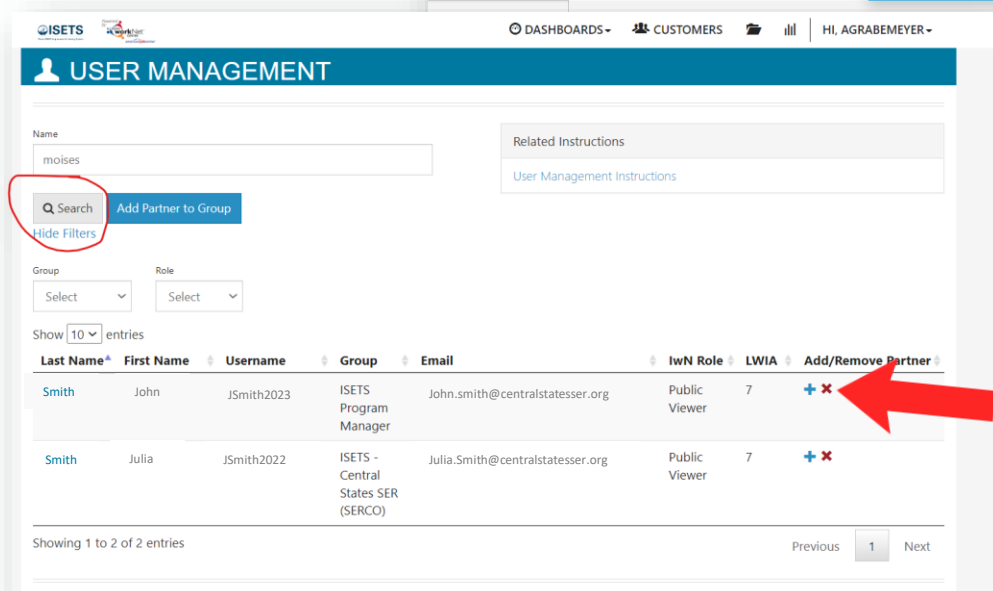
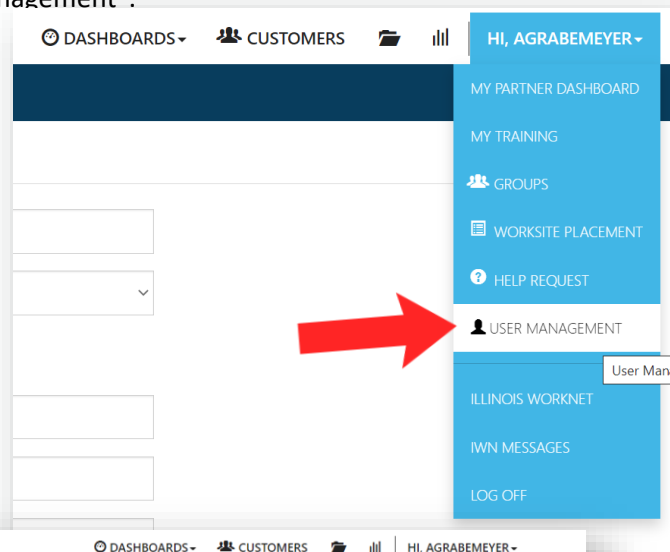
Add Partner Close



10. If this is the correct person click on the “Yes” radio button and click “Add Partner” button. If no account is found, you will see a message saying that a new account is being created then you will need to click the “Add Partner” button.

Removing existing users

1. Confirm that the request to remove the user was made from an authorized organizational representative.
2. Go to [ISETS](#) and login.
3. Click on the upper right-hand corner of the screen with your username and expand the dropdown menu. Choose “User Management”.
4. Search their name. Make sure to click the “Search” button; simply hitting “Enter” after typing into the system does not work.
5. Click on the red X to remove the user from that Provider/Role. For management staff, please make sure you have removed them from all listings.





Adding a new Provider in ISETS

When a new Provider contract is executed, an appropriate IDHS Super User must notify ISETS staff so that the Provider information can be added to ISETS including the dropdown menus.

The following steps must also be completed to ensure a new Provider has the access they need to get started in ISETS:

1. Add the new Provider by going to the Provider Info section and choosing the ISETS Provider Details tab.
2. Click the “Add New ISETS Provider” button and fill out all information for the provider.
3. Click “Save & Add Contract”.

The screenshot shows the ISETS web application interface. At the top, there's a navigation bar with 'DASHBOARDS' and 'CUSTOMERS' menus. The main section is titled 'PROVIDER INFO' and has several tabs: 'Appointments', 'File Uploads', 'ISETS Provider Details' (which is selected), 'ISETS E&T Programs', and 'Case Notes'. Below the tabs, there are two dropdown menus: 'Program' (labeled 'Select a Program') and 'Provider' (labeled 'Select a Provider'). Below these are three buttons: 'Select', 'Print', and 'Add New ISETS Provider'. A red arrow points to the 'Add New ISETS Provider' button. A modal window titled 'ADD NEW ISETS PROVIDER' is open in front of the main page. It contains the following fields: 'Provider Name *' (text input), 'Address *' (text input), 'City *' (text input), 'Zip *' (text input), 'State *' (dropdown menu with 'Illinois' selected), and 'Phone Number *' (text input). At the bottom of the modal is a checkbox labeled 'FCRC' and three buttons: 'Close', 'Save', and 'Save & Add Contract'.



5. The “Add New Contract” window will open. Fill out all information for the new contract including Contract Number, Program Offered, Start Date, End Date, and all measurable goals included in the exhibits for the Provider. Also make sure that the dollar amounts for the contract are accurate.
6. Click the “Save” button.
7. Add a Location for the provider in the Provider Details screen. If one is not available to choose, please submit a Help Request ticket to ISETS so a Location can be added to Illinois WorkNet for reference.
8. Add an E&T Program associated with the new contract and prompt the organization (through their Provider Manager) to edit/complete the program. Please see the section on “[Editing Program Information](#)” for more instructions on how to do this.

ADD NEW CONTRACT

Contract Number*

Program Offered*

☐ Earnfare

☒ SNAP 2 Success

☐ SNAP Job Placement

☐ SNAP Special Projects

☐ SNAP Supportive Services

☐ TANF JP

☐ TANF Supportive Services

☐ Work First

Start Date

End Date

Referred Participants Goal (Number of people referred to the program)

Number Serving Goal (Number of people assessed)

Number of Participants Enrolled

Employed Participants Goal (Number of people employed)

Program Goals - Based on selected Program Offered

Contract Admin Amount \$

Admin Match Amount \$

Contract Indirect Cost Amount \$

Contract Support Services Amount \$

Support Match Amount \$

Contract Wages Amount \$

Wages Match Amount \$

Contract and Indirect Amount \$

Match Amount \$

Total Program Expenditure

Close Save



5. Ensure that the Provider has all Activities and Services available to them by scrolling to the bottom of the ISETS Provider Details page and clicking the “Edit Services to Use on Career Plans” button. Make sure that all SNAP E&T Activities and Services are checked and added. And click “Save”.

SERVICES

Show 10 entries

| Category | Name | Description | Remove |
|----------|---|--|--------|
| N/A | A/BA - Associates/Bachelor degree | A/BA - Associates/Bachelor degree | Remove |
| N/A | APU - Apprenticeship Unsubsidized | Apprenticeship that is unsubsidized employment. | Remove |
| N/A | BE - Basic Education (ABE/GED/Bridge) | Adult Basic Education (ABE) programs serve students ages 16 and over who are not enrolled in school and who want to improve their basic skills in reading, writing, math, listening, and speaking. | Remove |
| N/A | Books & Training Supplies | Books & Training Supplies | Remove |
| N/A | Childcare/Medical | Childcare/Medical | Remove |
| N/A | Clothing | Clothing necessary to seek, accept and maintain employment or training program. | Remove |
| N/A | CS - Community Service | CS - Community Service | Remove |
| N/A | CW - Community Workfare | Community work includes unpaid work a person performs at a p... The p... Com... them get a job. | Remove |
| N/A | E - Employment (subsidized or unsubsidized) | Employment | Remove |
| N/A | Educational/Credential Testing | Educational/Credential Testing | Remove |

Showing 1 to 10 of 35 entries

ADD SERVICE

Service Type: All

Show 10 entries

| Add | Category | Service | Description |
|--------------------------|----------------------|---|---|
| <input type="checkbox"/> | Other E&T Activities | A/BA - Associates/Bachelor degree | A/BA - Associates/Bachelor degree... See More |
| <input type="checkbox"/> | Other E&T Activities | APU - Apprenticeship Unsubsidized | Apprenticeship that is unsubsidized employment... See More |
| <input type="checkbox"/> | SNAP Activities | BE - Basic Education (ABE/GED) | Adult Basic Education (ABE) programs serve students ages 16 ... See More |
| <input type="checkbox"/> | Support | Books & Training Supplies | Books & Training Supplies... See More |
| <input type="checkbox"/> | Support | Childcare/Medical | Childcare/Medical... See More |
| <input type="checkbox"/> | Support | Clothing | Clothing necessary to seek, accept and maintain employment o... See More |
| <input type="checkbox"/> | Other E&T Activities | CS - Community Service | CS - Community Service... See More |
| <input type="checkbox"/> | SNAP Activities | CW - Community Workfare | Community work includes unpaid work a person performs at a p... See More |
| <input type="checkbox"/> | SNAP Activities | E - Employment (subsidized or unsubsidized) | Employment... See More |
| <input type="checkbox"/> | Support | Educational/Credential Testing | Educational/Credential Testing... See More |

Showing 1 to 10 of 33 entries

Previous 1 2 3 4 Next

Save **Close**



Username Menu

In the upper right-hand corner of the screen in ISETS you will see your username displayed. If you click on your name, you will see a dropdown menu. The following are the available options you can select:

My Partner Dashboard

Connects to the user's dashboard to complete tasks like change password or view their own status on activities.

My Training

Connects to training videos associated with the program in which the partner is working.

Groups

Returns the user to the initial group menu in the event the user has access to more than one project.

Worksite Placement

Links to the Worksite Placement dashboard to add worksites and payroll associated with a project/program.

Help Request

Links to the help desk ticketing system where users may report issues happening in the system.

Illinois workNet

Returns the user to the main Illinois workNet page.

IWN Messages

Links the user to messages sent in case notes and messaging within Illinois workNet.

Illinois workNet

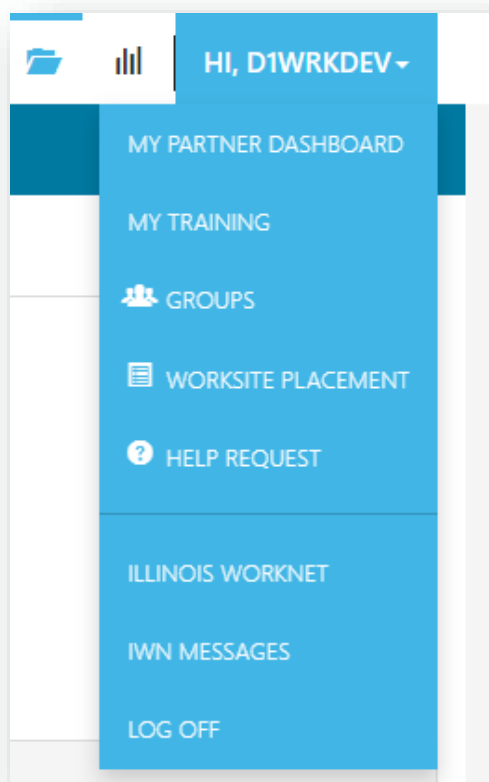
Returns the user to the main Illinois workNet page.

IWN Messages

Links the user to messages sent in case notes and messaging within Illinois workNet.

LOG OFF

Allows you to log out of ISETS or Illinois workNet.





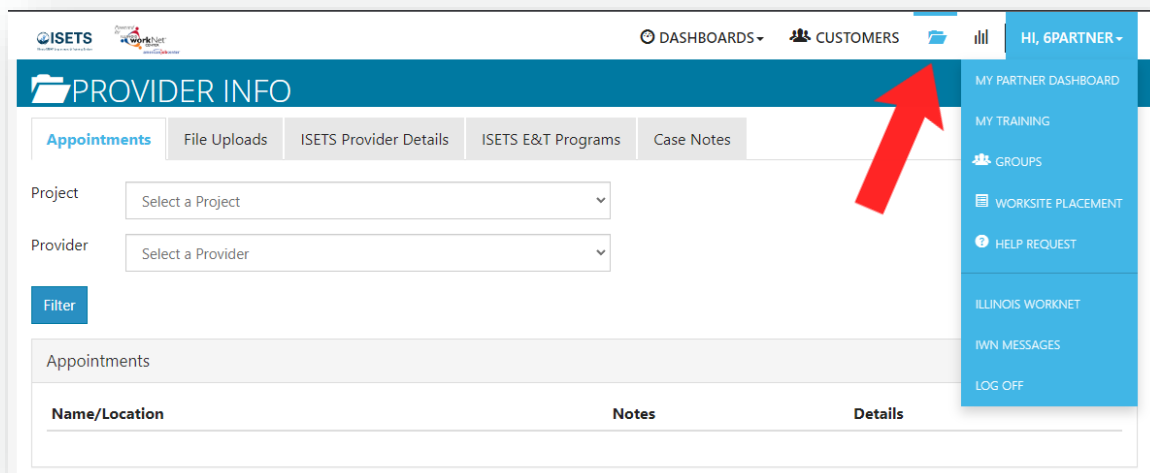
Viewing and Editing Provider Information

The Provider Information section of ISETS helps grantees add, track and follow items related to the grant and the agency. This area does not deal with specific customers. Tabs may vary based upon the grant parameters.

Below is a table of which roles have access to edit information in this section of ISETS. A more detailed list is provided in the appendix ([ISETS Permissions](#)).

| Workforce Development (IDHS) | Provider Managers (IDHS) | Program Manager (CBO) |
|------------------------------|--------------------------|--------------------------|
| View contract | View contracts | Edit Contracts |
| Edit Programs | Edit Programs | Edit Programs |
| View Worksites | View Worksites | Edit Worksites |
| View Services/Activities | Edit/Remove Services | View Services/Activities |

1. Inside ISETS, click on the “Provider Information” icon on the top right menu: the partially open folder icon.





Appointments

Agencies who want to offer intake appointments, office hours, or orientations, can add them by following these steps:

1. Select ISETS as the Project for the first dropdown field.
2. Select the appropriate Program and Provider name.
3. Click “Filter” to see locations for the project/agency.
4. Click the “Add Appointment Site” button.
5. Name the appointment site.
6. Add instructions for the appointment i.e., bring an I.D., bring referral form, etc.
7. Appointments and Appointment sites can be deleted from the list when needed.

*Providers may find it more expedient to add recurring appointments.

To edit an existing appointment site:

1. Click on the “Edit Site” button and make any changes to the Appointment Site information.
2. Click on the “Edit Schedule” button and add scheduled appointments by clicking on the “Add Appointment” button.
3. To add an appointment, click on the “Appointment Date and Start Time” field and pick a day on the calendar. You can choose a time by toggling the time listed with up or down arrows (appointments are automatically given one hour).
4. Edit the end time.
5. Select the number of openings.
6. Click the “Add Appointment” button.



File Uploads

These are typically files that are associated with a Provider agency, grant or staff – NOT individual customers. Provider managers may add files to a Provider record by performing the following steps:

1. Select ISETS as the Project for the first dropdown field.
2. Select the appropriate Program and Provider name.
3. Click “Upload File”
4. Select type of upload category
5. Select a file to upload
6. Add a description of the file so that each file doesn’t have to be opened.
7. Click the Upload button.

The screenshot shows the 'PROVIDER INFO' page with the 'File Uploads' tab selected. The 'Project' dropdown is set to 'ISETS', 'Program' is 'SNAP Job Placement', and 'Provider' is 'Select a Provider'. The 'Upload File' button is highlighted with a red arrow labeled '3'. The 'UPLOAD FILE' modal is open, showing a list of categories. The 'Upload' button at the bottom of the modal is highlighted with a red arrow labeled '7'.

ISSETS Provider Details

This tab represents grant specific information. Access is granted to Providers participating in that grant. Access to edit information is limited to IDHS staff and designated Provider Management staff. Items in the tables can be filtered by clicking the column header.

1. Select the Project and select Provider and click “Select”.
2. The “Add New Provider” button allows a new grantee to be added to the system. (Available only to IDHS Super Users)

The screenshot shows the 'PROVIDER INFO' page with the 'ISSETS Provider Details' tab selected. The 'Program' dropdown is set to 'SNAP Job Placement' and the 'Provider' dropdown is set to 'Select a Provider'. At the bottom of the page, there are buttons for 'Select', 'Print', 'Add New ISETS Provider', and 'Reset Filters'. A red arrow points to the 'ISSETS Provider Details' tab.



The **Associated Contracts** section contains IDHS contract information. This section can only be edited by IDHS Super Users and Billing Managers. IDHS staff enters the initial contract information. Billing Managers are responsible for updating the contract information. This information should be updated any time a contract is amended. If you notice that a contract is incorrect or has been amended and has not been updated, please check here and contact your Billing Manager or submit a Help Request ticket to report the change.

| ASSOCIATED CONTRACTS | | | | | | Add Contract |
|-----------------------------|----------|------------|-----------|--------------------|--------------|-----------------|
| Show 10 entries | | | | | | |
| Number | Provider | Start Date | End Date | Program Offered | Total Amount | |
| FCSAG | Chicago | 7/1/2021 | 6/30/2022 | SNAP Job Placement | \$ | Remove |
| FCSBC | Chicago | 7/1/2022 | 6/30/2023 | SNAP Job Placement | \$ | Remove |
| Showing 1 to 2 of 2 entries | | | | | | Previous 1 Next |

The **Locations** section lists program locations where a Provider serves SNAP customers. Each Provider partner should have at least one location added. Programs are assigned by location. IDHS uses distance from program to participant as one factor to match when making a referral to a partner agency.

| LOCATIONS | | Add Location |
|-----------------------------|---------|-----------------|
| Show 10 entries | | |
| Location Name | Address | |
| | | Remove |
| Showing 1 to 1 of 1 entries | | Previous 1 Next |

To add a location:

1. Click on the “Add Location” button.
2. If not available to be added, submit a Help Request ticket to have your location added to the Illinois WorkNet database of Provider locations .

The **Monitorings** section lists periodic performance and compliance audits of the program/contract performed by IDHS. These can only be entered by IDHS Administrative staff or IDHS Provider Managers.

1. Click on Add Monitoring
2. Choose the Type: No corrective action required, Recommendation, or Finding.
3. Add a written executive summary in the Description

| ADD MONITORING | |
|-----------------------------------|--------|
| Date* | |
| Type* | Select |
| Description* | |
| Due Date * | |
| Status* | Select |
| Close Upload Monitoring File Save | |



1. Add the Due Date
2. Choose the Status: Open or Closed

*If a new Monitoring is added, a copy of the Performance Improvement Plan document (linked in this section) must also be uploaded to the File Uploads section for reference.

If a Provider would like to respond in writing to a Monitoring, they may add that information to their Organization Case Notes, or they can upload it to the Uploads section.

The **E&T Programs** section contains information related to the E&T programs offered by the Provider. These are only programs which are directly related to IDHS contracts. More detailed information about E&T Programs for each Provider can also be found in the next tab: “ISETS E&T Programs”. See the next section for that information.

The **Worksites** section contains information about worksite placements. As opposed to Employment Placements, worksites are only locations/employers where E&T Work Experience Activities or Earnfare/OJT takes place.

WORKSITES

Show

10

 entries

1

Add/Edit Worksite

Search

| Employer | Worksite | Job Title | Job Type | Wages | Total Openings | Full Time Positions Filled | Part Time Positions Filled |
|----------|----------------|--|----------|---------|----------------|----------------------------|----------------------------|
| Township | Township | Office Clerks, General | N/A | \$12.00 | 8 | 0 | 0 |
| Township | City of Wamac | Grounds Maintenance Workers, All Other | N/A | \$12.00 | 4 | 0 | 0 |
| Township | Salvation Army | Stock Clerks and Order Fillers | N/A | \$12.00 | 10 | 0 | 1 |

Showing 1 to 3 of 3 entries

Previous

1

Next

To add a worksite (for reference when working with Providers):

1. Click on the “Add/Edit Worksite” button. This will load a new page titled “Worksite Placement”.
2. Select ISETS as the Project and select the appropriate Provider and Employment Type from the dropdown lists. *Note: if you do not select an Employment Type, all employment types will be listed.



ISETS WORKSITE PLACEMENT

Employers Worksite Placement Payroll

Project: ISETS

Grantee/Provider: Select

Employment Type: Select

Related Instructions: Worksite Placement Instructions

Add Employer/Worksite

WORKSITE, AND JOB POSTING INFORMATION.

Search:

Total Number of Openings Full Time Positions Filled Part Time Positions Filled

3. Click on “Add New Worksite” to add a new Worksite or click on the name of the worksite in the resulting list to edit that worksite.
4. If you are adding a new worksite, you will be taken to a page asking you to “Select Employer or Enter information for a new Employer”. Choose your Provider as the Employer by clicking the blue “Select” button next to your organization’s name.
5. In the next page, select an existing worksite or click the “Add New Worksite” button.
6. Enter all information including a Primary Contact for the worksite and click on the “Next Step” button.

ISETS WORKSITE PLACEMENT

RETURN TO WORKSITE LIST

Select Employer Select Worksite Add Worksite Placement Information

STEP 2 - SELECT WORKSITE OR ENTER INFORMATION FOR A NEW WORKSITE

Name *

☐ Is this worksite the same as the employer?

Primary Phone (Format: XXX-XXX-XXXX) *

Secondary Phone (Format: XXX-XXX-XXXX)

Address 1 *

Address 2

City *

State *

Illinois

ZIP Code *

PRIMARY CONTACT

First Name *

Last Name *

Title *



7. The next screen will prompt you to add the placement information. This is the actual job your customer will be doing at the worksite.
8. Click the “Finish” button.

ISETS E&T Programs

This tab represents program specific information. You can filter by clicking the radio buttons near the top of the page. Choose the type of program, the Provider name, Contract Number, or Fiscal Year and click “Filter”. Program information may be viewed or edited based on user access levels.

1. To remove the program click on “Remove”.
2. To edit program information, click on “Edit” next to the item you want to edit on the resulting list. A new page will load with all of the program details.



PROVIDER INFO

Appointments | File Uploads | ISETS Provider Details | **ISETS E&T Programs** | Case Notes | Grantee Details | Training Programs

Search by: ☐ Program ☒ Provider ☐ Contract Number ☐ Fiscal Year

Provider: Able Career Institute/IT Career Lab - 567 W. Lake St. Ste 1150 Chicag

Filter **Add Program**

Show 10 entries

| Program Name | Provider | Contract Number | Fiscal Year | Location Name | Program Schedule | Program Offering | Training Activities | Other Training | Options |
|----------------|-------------------------------------|-----------------|-------------|---------------|------------------|------------------|---------------------|----------------|---------------|
| SNAP 2 Success | Able Career Institute/IT Career Lab | FCSABC123 | | | | None | | | Edit - Remove |

Showing 1 to 1 of 1 entries

Previous 1 Next

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Best Practice

Provider Managers should **NEVER** remove any programs without consulting with their manager. Removing a program could result in errors in a contract or FY data reports. Programs for past years should never be removed.

IDHS staff may have added basic information from the contract, however the specifics of a program must be edited by Provider Program staff or a Provider Manager to ensure accuracy.

***Note:** this information is used to match a program to customers seeking services during the referral process, so please help Providers choose answers based on which customers would best be served by this program.

Multiple programs may be entered under the same contract if they serve different types of customers or serve customers in different locations.

1. Make sure the correct contract number is selected.
2. Choose the correct location where that program is administered.
3. Choose the correct Program type.
4. Choose the correct Fiscal Year. ***Note** Fiscal Years run from July 1 – June 30 of the following year.
5. Check all appropriate boxes for the activities a program is contracted to provide to customers through this program.

PROVIDER INFO

Appointments | File Uploads | ISETS Provider Details | **ISETS E&T Programs** | Case Notes | Grantee Details | Training Programs

Add Program Information | Add Baseline Requirements | Add Recommendation Criteria

Provider Name: Able Career Institute/IT Career Lab

Contract Number: FCSABC123

Location Name: Select

Program Name: SNAP 2 Success

Fiscal Year: Select

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

☐ E - Employment (subsidized or unsubsidized)

☐ JT - Job Skills Training

☐ PAU - Pre-Apprenticeship

What other training does this program offer?

☐ Offer Computer/Digital Literacy Training

☐ Employability Skills

How is this program offered?

☐ Full Time

☐ Part Time



1. Check boxes for Full Time and/or Part Time.
2. Enter a program description. You may enter anything here that describes your program to someone looking to possibly participate or refer a customer to you. This text will show up in the referral box when matching with customers.
3. Add a Target Occupation only if your program targets a specific job or industry.
4. Click "Save and Go to Next Page".
5. Check the appropriate boxes to add criteria that will help match participants to the program when IDHS makes a referral to the agency. If a program is appropriate for everyone, check all of the boxes to ensure a program is matched with the largest number of customers.
6. Click Finish



When a new program/fiscal year begins, each Program will need to be associated with the new FY contract by the ISETS Manager. This will allow referrals and enrollments to be associated with the new program. This is typically done the morning of July 1.

Case Notes

This tab contains case notes associated with a Provider agency, grant or staff – NOT individual customers.

To view case notes:

1. Select ISETS from the Project dropdown.
2. Select the appropriate Program type and Provider from the dropdown menus.
3. Click “Select”.

You may filter case notes by clicking on the top of any column.

| Provider | Contact Date | Subject | Comment | Delivery Method | Entered By | Entered |
|----------------------|--------------|--------------|---|---|----------------|--------------------|
| Asian Human Services | 7/23/2021 | Test message | The messages will be about the agency. Participants should not be a part of this at all. Emails should be anyone who has access to the agency or all of the agencies. | As Illinois workNet Message and Email | ISETS @Partner | 7/23/2021 2:37 PM |
| Asian Human Services | 7/26/2021 | Test | Test | Save as case note without sending a message/email | Edgar Vizcaino | 7/26/2021 11:06 AM |

To add a case note:

1. Click the “Add Case Note” button.
2. Select a task about which the case note is being written.
3. Type a subject
4. Type a message
5. Select how the case note is to be saved.
6. If being sent as a message, select to whom the message is to be sent.
7. Click the “Add Case Note” button at the bottom.

Send Case Note As:

- ☐ As Illinois workNet Message
- ☐ As Illinois workNet Message and Email
- ☐ Save as case note without sending a message/email

Send Message/Email to:

- ☐ Illinois workNet Team
- ☐ Heather Baseler
- ☐ Praneeeth Bommineni
- ☐ John Brechbuhl
- ☐ John Brechbuhl
- ☐ Erik Delcomyn
- ☐ Andrea Grabemeyer
- ☐ Jerome Grimmer
- ☐ George Hampton
- ☐ Charles Hookins



Best Practice

Any time IDHS staff meets with or attempts to contact a Provider a case note should be added . Examples of a good time to make a case note are:

- Findings during a monitoring (Corrective Action Plan)
- Findings during a Staffing meeting
- Notes from a 4334 meeting
- Findings/errors found during a data audit
- Updates to a contract
- Notes from a meeting with a Provider to document concerns or agreements
- Attempts to contact an unresponsive Provider

Best Practice

Six essential things every case note must include:

1. Date of entry (ISETS automatically records this)
2. Date the contact took place (this is not necessarily the same as 1.)
3. Type of contact (phone, office visit, third party contact, virtual meeting, employment verification, referral)
4. DAP:
 1. Data – what you are told, what you observed, what happened
 2. Analysis – your professional opinion on what the situation is, what is helping/hindering the process.
 3. Plan – your plan for moving forward, your solution, or resolution
5. The person making the note (ISETS automatically records this for you)

Other guidelines to follow:

- To correct an error, enter another case note explaining that the previous note is in error. Deleting case notes is not a best practice.
- To add something your forgot, enter another case note and write “Addendum:”
- If you write a note out of sequence, make sure you note that the case note is “out of order”.
- Refer to yourself in the 2nd person “This writer” or 3rd person as your title and initials “Case Manager RP”.
- Refer to the customer or participant by that term or by initials.
- Refer to 3rd party contacts by full name and if possible email or phone.
- Refer to others in your organization by title and initials “Manager DC”
- Never reference other customers/participants in a file that is not their own.



ISETS Dashboard

All customer data in ISETS is displayed on a dashboard. This dashboard provides a window into

- how customers are moving through the stages of a program
- how an organization is performing measured against contractual benchmarks
- what action or next steps need to be taken with customers

Because the dashboard contains a lot of data, it may take longer to load. Please be patient and allow it a few minutes before assuming it isn't working or hitting refresh.

You may filter the dashboard by Region, Provider, and/or Fiscal Year.

Notifications

The first section called "Notifications" contains a collection of data counts which require your attention. This section is at the top for your convenience and to grab your attention. Red items require immediate action, usually by the Provider. Yellow items require action soon, usually within 30 days. Best practice is to review this section at least weekly and reconcile any items that require action.

Search Criteria

Select a County ▼ Select a Program ▼ Select a Provider ▼ FY2025 ▼ Select Fiscal Month(s) ▼

Search Reset Filters

NOTIFICATIONS

Referrals

- 2 Provider has not responded to IDHS Referral within 10 Business Days ⓘ
- 3 Customers with SNAP Eligibility Status of Needs Verification Unduplicated Customer Count ⓘ
- 6 Reverse Referrals Pending IDHS Response over 48 Hours ⓘ

Redeterminations

- 67 Redetermination Date Past Due ⓘ ⓘ
- 68 30 Days or Less ⓘ ⓘ
- 1 31 to 59 Days ⚠ ⓘ

Midpoints

- 56 30 Days or Less ⓘ ⓘ

Activities

- Initial Screening**
- Service Needs Assessment**
- 42 Not Complete - Overdue ⓘ
- 2 Not Complete - Over 12 Months ⓘ
- EP - Employability Plan**
- 1 Customer has Completed All SNAP E&T Activities but has Not Exited the Program ⓘ
- Enrolled Active Customers**
- 50 No Case Note Entered in the Last 2 Weeks ⓘ
- 50 No activity on EP/Case Management in 2 Weeks
- Training/Education Progress**
- 1 Not Participating ⓘ
- 2 Activity Open Beyond Planned Due Date

Services

- 1 Staffing Changes Requested ⓘ
- 2 Services Needing Amendment ⓘ
- 1 Services Needing Overrides ⓘ

Outcomes

- 20 Number of customers without employment verifications
- 20 Employment Verifications that need approval
- 1 Need Employment Verification For SS Issued For Retention Services

Best Practice

Make it a part of your daily routine to check the dashboard to see the progress of the organizations you manage and to guide your work. Check the following frequently:

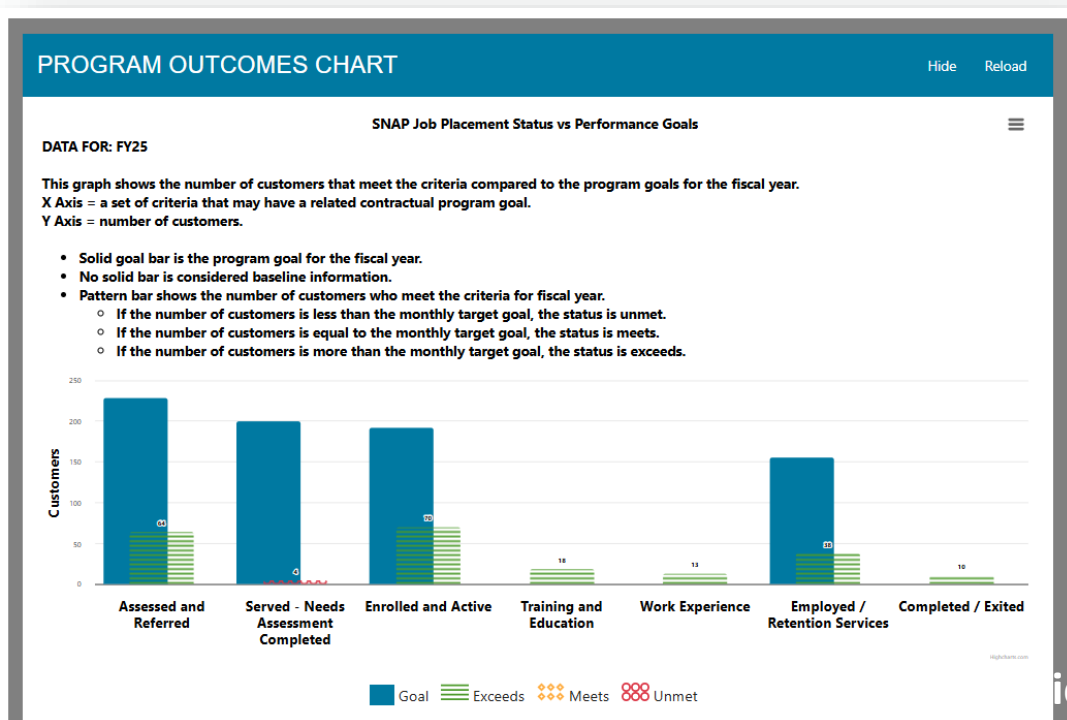
- referrals which have been sent or need to be accepted,
- assessments which need to be completed
- customers in retention or other activities who may need follow-up.



Program Outcomes Chart

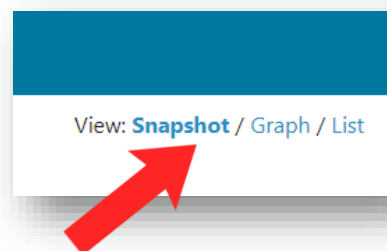
This bar graph is a year-to-date count of how many customers a Provider has in various categories. The blue bars labeled “Goal” represents the Provider’s program year goal for that category. This goal is taken directly from the contract that was entered into the system. If you believe there are any errors in the goal numbers, please review the Provider’s contract.

The chart legend shows which colors represent progress toward that goal.



Below this graph are sections with additional data. Each of these sections can be viewed as a “Snapshot”, a “Graph”, or a “List”. To change your view, click on the linked words at the upper right corner of the section. Different data may be available in different views.

Some of these will be listed as “Good” (green) indicating that no action needs to be taken. Some may be listed as “Needs Action” (yellow) which means that an action may be pending. Some may be listed as “Red Flags” (red) which means that action is overdue.





It is recommended that Provider Managers review the dashboard information for their Providers at least monthly in preparation for their monthly Staffings.

Further is an explanation of the lower sections on the dashboard that contain more detail.

Demographics

This section gives a breakdown of the selected FY customers enrolled by ethnicity, race, age, and gender.

Reports

This section gives an accounting of monthly reporting and the status of each report. To view report statuses, click on the input field and select which Providers you would like to include then click “Filter”. You will see a list load by Provider that includes color coded status on each month’s reporting. Use this as a quick visual guide to ensure monthly reports are completed timely.

REPORTS

Hide Reload

SELECT A PROVIDER TO SEE YEARLY STAFFING REPORT STATUS

✕ African American Christian Foundation

✕ Angel Of God Resource Center

✕ Aunt Martha's Youth Svc Ctr Inc.

✕ CABET Group, Inc.

✕ Asian Human Services of Chicago

✕ Benton Township

✕ CARA Program

Filter

Legend: ● Not Started ● Provider Manager Not Complete ● Billing Not Complete ● All Complete ● Future Date

No Current Program Available For African American Christian Foundation

No Current Program Available For Angel Of God Resource Center

Asian Human Services of Chicago - S2S

Jul

Aug

Sep

Oct

Nov

Dec

Jan

Feb

Mar

Apr

May

Jun

Requests Pending to Reopen Staffing: 0

Asian Human Services of Chicago - SJP

Jul

Aug

Sep

Oct

Nov

Dec

Jan

Feb

Mar

Apr

May

Jun

Requests Pending to Reopen Staffing: 0

No Current Program Available For Aunt Martha's Youth Svc Ctr Inc.

Benton Township - EF

Jul

Aug

Sep

Oct

Nov

Dec

Jan

Feb

Mar

Apr

May

Jun

Requests Pending to Reopen Staffing: 0

No Current Program Available For CABET Group, Inc.

CARA Program - S2S

Jul

Aug

Sep

Oct

Nov

Dec

Jan

Feb

Mar

Apr

May

Jun

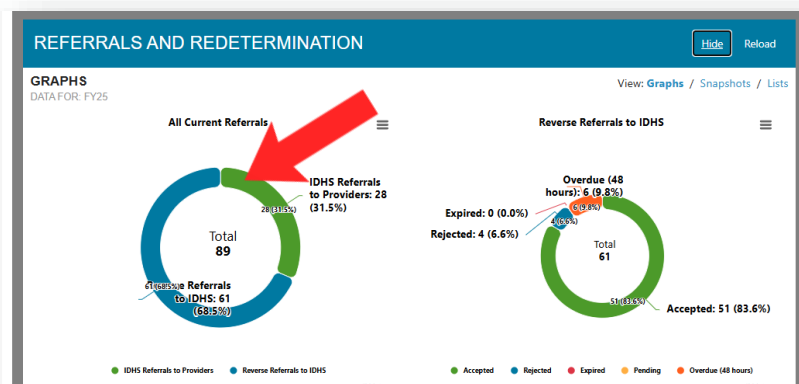
Requests Pending to Reopen Staffing: 0

Illinois SNAP Employment & Training System -
Updated July 2025

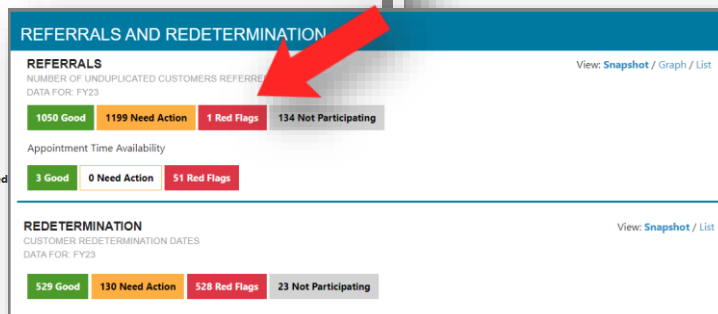
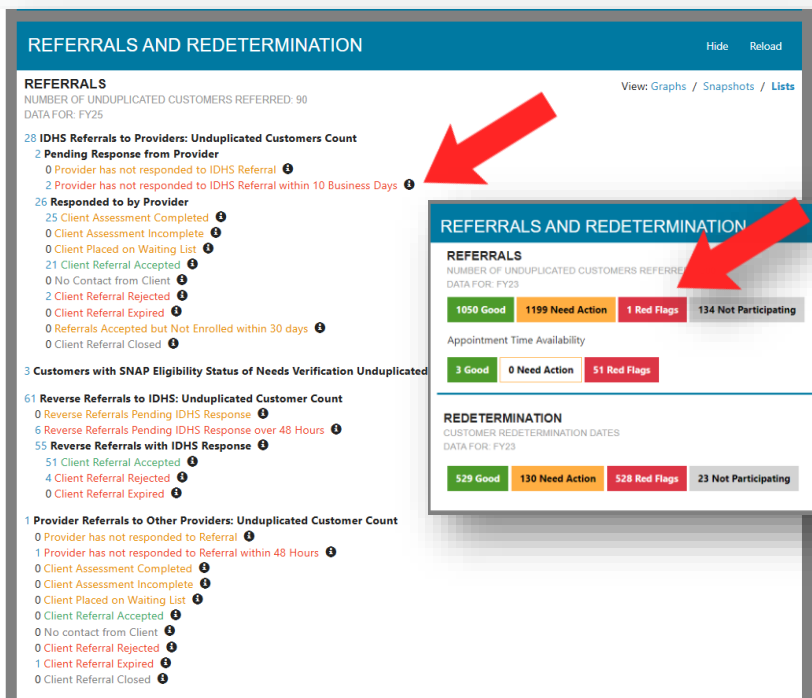


Referrals and Redetermination

This section gives an accounting of how many referrals an organization has sent, received, accepted, or rejected. The first graph shows all current referrals and how many are Referrals to Providers and how many are Reverse referrals. The second graph shows only Reverse Referrals to IDHS and their status. For any of these graphs, clicking on the graph section will open a list of the customers included in that category (a drilldown).



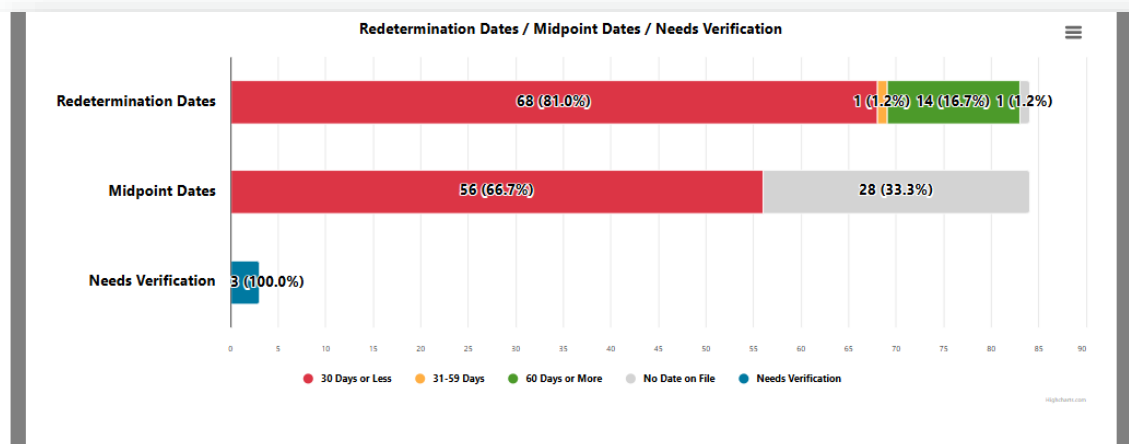
In the case of referrals, if action is overdue, these will be listed as “Overdue” in graphs or lists or “Red Flags” in the snapshot view. Please take action (or prompt Providers to take action) on these referrals immediately.





The Redetermination list tells an organization how many people have a redetermination date (to renew their SNAP benefits) within 60 days. Those with less than 30 days until their redetermination will be included in the red portion of the graph or listed in red text in the list view. Red items indicate that these customers may need to make an appointment with an FCRC to renew their benefits or they will lose them and their E&T eligibility. It is recommended that Providers remind their customers when these dates are approaching.

To view the list of customers in each section, simply click on that graph section, the colored block in the snapshots view, or the linked blue number in the list view.



REDETERMINATION

CUSTOMER REDETERMINATION DATES

DATA FOR: FY25

67 Redetermination Date Past Due ⓘ ⓘ

68 30 Days or Less ⓘ ⓘ

1 31 to 59 Days ⚠ ⓘ

14 60 Days or More ✅

1 No Redetermination Date

MIDPOINT DATES

CUSTOMER MIDPOINT DATES

DATA FOR: FY25

56 30 Days or Less ⓘ ⓘ

0 31 to 59 Days ⚠ ⓘ

0 60 Days or More ✅

28 No Midpoint Date

Best Practice

Make it a part of your routine to check the dashboard at least weekly. Providers are required to do the following:

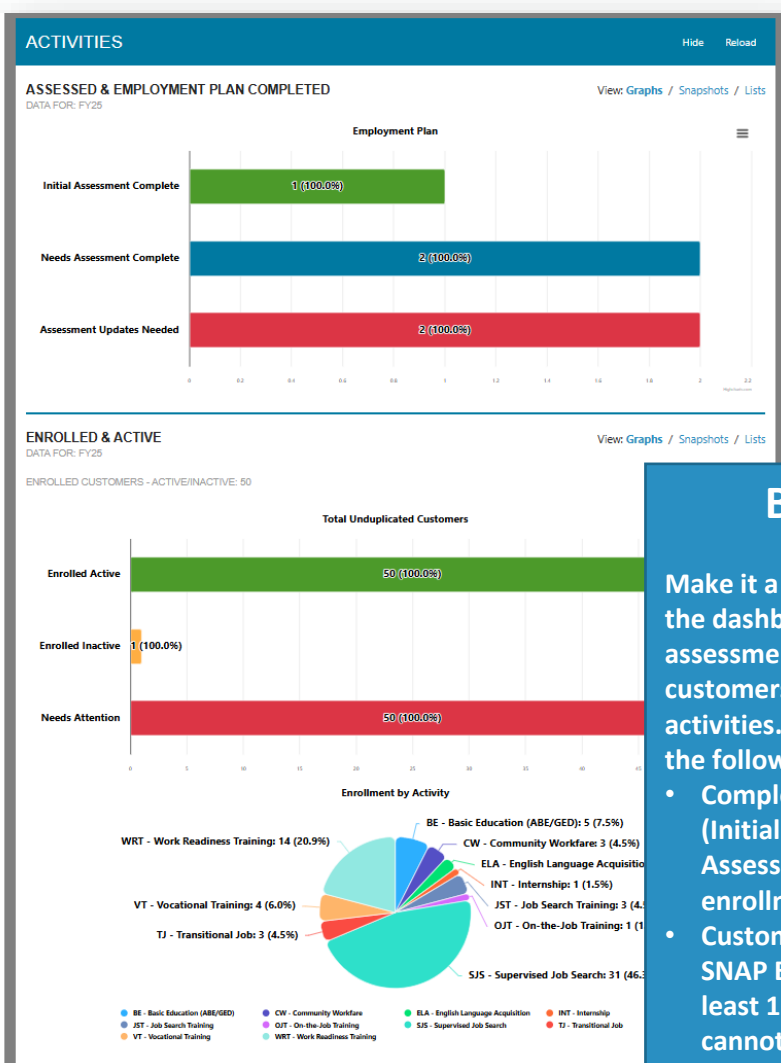
- Contact referred customers within 48 business hours
- Respond to a referral within 5 business days
- Remove customers from their caseload who are no longer eligible for SNAP E&T services



Activities

This section indicates how many customers have been assessed and have an EP completed, how many are enrolled in E&T and active, and how many are enrolled in Training/Education SNAP Activities with an agency.

Clicking on the List view for Assessments will give a more detailed list of how many customers have completed assessments and how many still have incomplete assessments. Clicking on the List view for Enrolled & Active customers will give an accounting of customers enrolled in SNAP E&T activities.



Best Practice

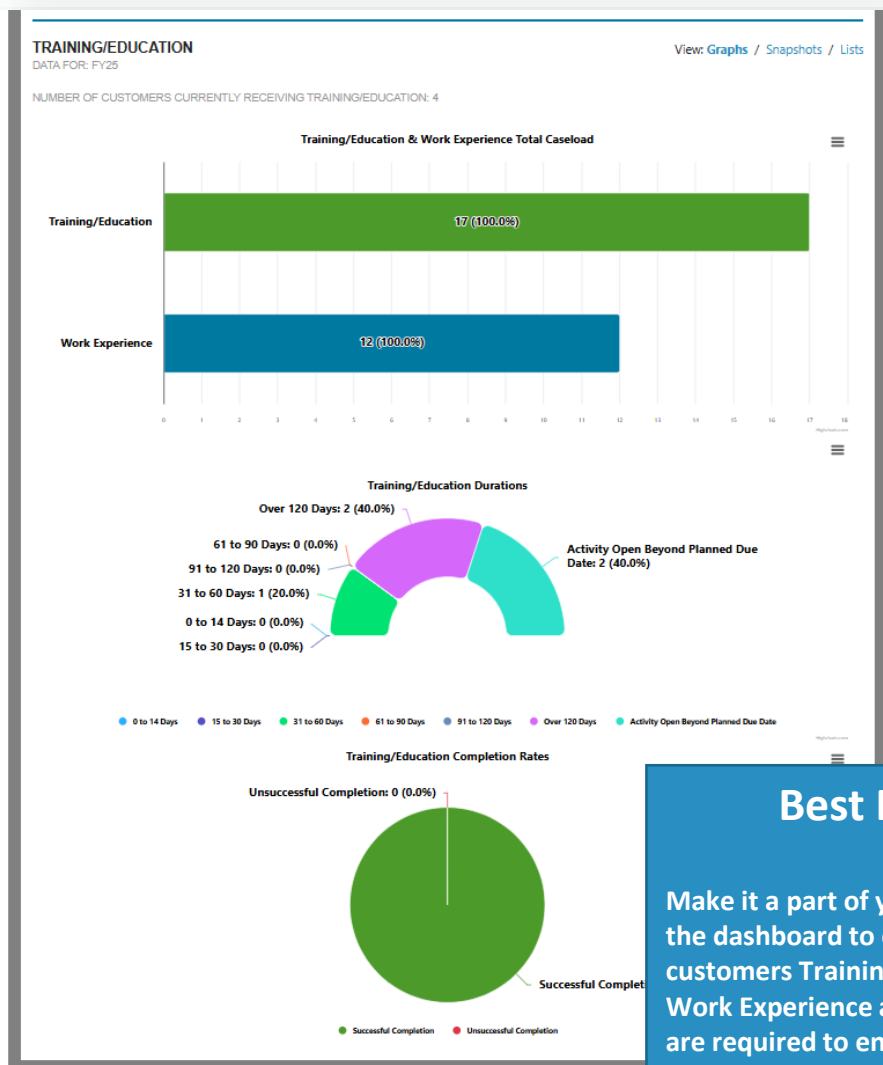
Make it a part of your routine to check the dashboard to ensure all assessments are completed and customers are engaged in appropriate activities. Providers are required to do the following:

- Complete the entire assessment (Initial Assessment + Needs Assessment) within 30 days of enrollment.
- Customers enrolled and active in SNAP E&T must be engaged in at least 1 SNAP E&T activity (SJS cannot be a standalone activity).



Training/Education

This section contains data on how many customers are enrolled in SNAP E&T Training/Education and Work Experience components. There are also graphs indicating the duration customers spend in Training/Education components as well as completions. Clicking on the List view of the Training/Education data will give a breakdown of customer progress and the duration of their Training/Education activity.



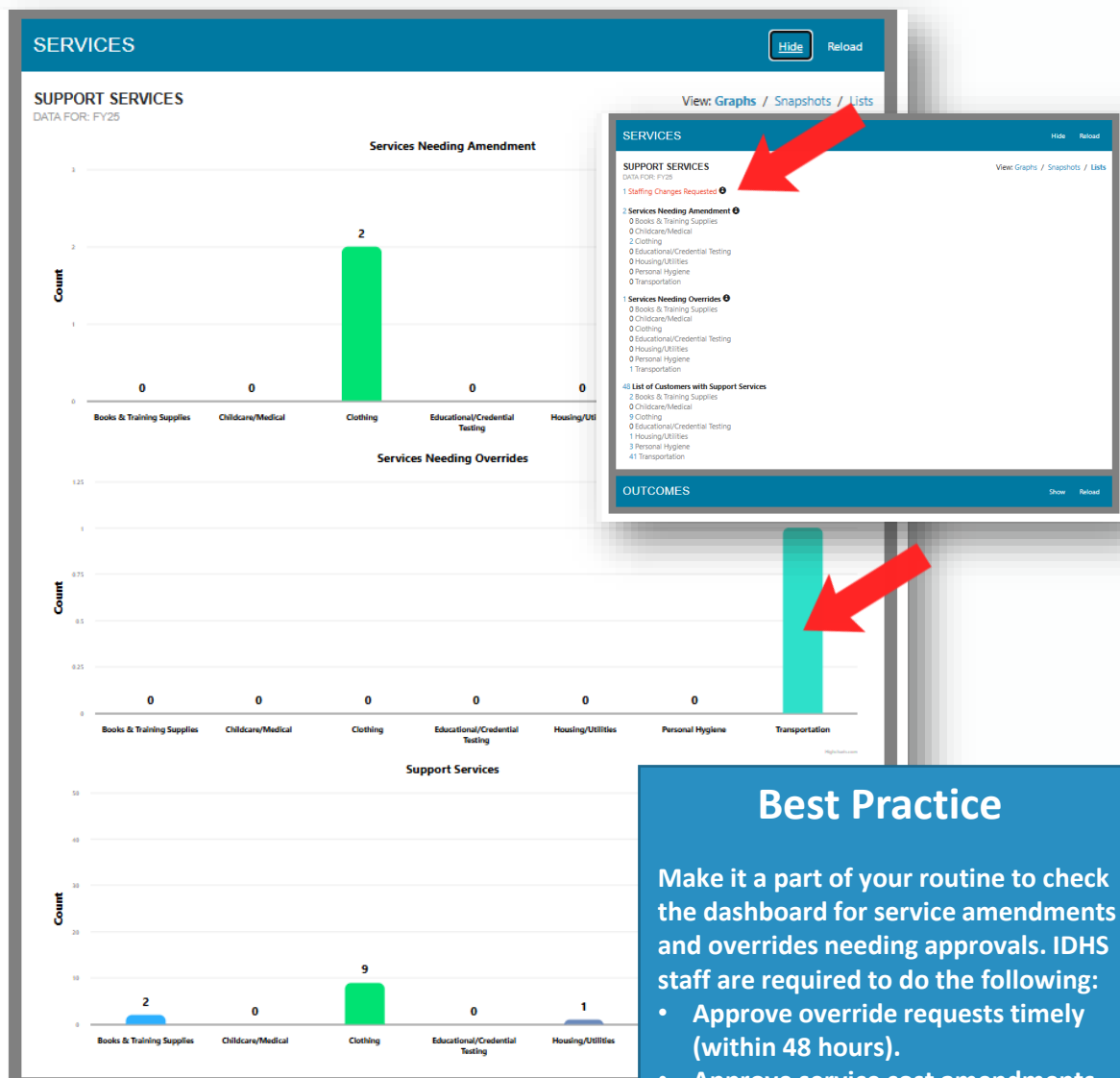
Best Practice

Make it a part of your routine to check the dashboard to check the progress of customers Training/Education and Work Experience activities. Providers are required to ensure that customers are progressing appropriately and that customers are gaining employability as a part of participation in these activities.



Services

This section contains data on Support Services given to customers throughout the program year. The first graph shows services requiring approval of amendments. The second graph shows support services requesting overrides that need to be approved. The third graph shows how many supportive services have been given in each category. Clicking on the List view for Support Services will give a count of each instance broken down by type of service.



Best Practice

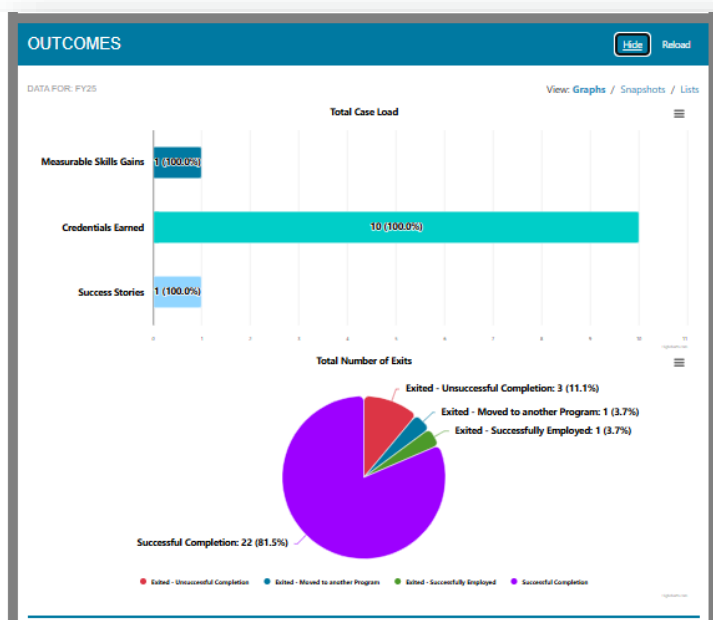
Make it a part of your routine to check the dashboard for service amendments and overrides needing approvals. IDHS staff are required to do the following:

- Approve override requests timely (within 48 hours).
- Approve service cost amendments as a part of your regular staffing routine.



Outcomes

This section contains a breakdown of customer outcomes including skills gains, credentials, success stories, exits and employment. The first graph shows how many customers have gained skills, earned credentials, or have success stories documented. The next graph shows how many customers you have exited from the program and the reason. Clicking on the List view will list a count of customers who have gained skills; credentials like Apprenticeship Certificates, Diploma/GED, Associates, or Bachelor's degrees while in the E&T program; and have completed SNAP E&T and the reason for their exit. Measurable Skills Gains, Credentials Earned, and Post Exit Employment are all required for Providers to enter in ISETS. Success Stories are optional yet helpful to IDHS.



OUTCOMES [Hide] [Reload]

DATA FOR: FY25 View: Graphs / Snapshots / Lists

| Category | Count |
|---|-------|
| Measurable Skills Gains | 1 |
| Educational Functional Level (EFL) | 0 |
| Secondary Transcript/Report Card | 0 |
| Postsecondary Transcript/Report Card | 0 |
| Training Milestone | 1 |
| Skills Progression/Diploma/Certificate/Degree | 0 |
| Credentials Earned | 10 |
| Apprenticeship Certificate | 0 |
| Associate's Degree | 0 |
| Bachelor's Degree | 0 |
| Badge | 0 |
| Certificate | 1 |
| Certification | 4 |
| Credential | 1 |
| Degree (not otherwise designated) | 0 |
| Digital Badge | 0 |
| Diploma | 0 |
| Doctoral Degree | 0 |
| General Education Development (GED) | 0 |
| Journeyman Certificate | 0 |
| License | 0 |
| Master Certificate | 0 |
| Master's Degree | 0 |
| Micro-Credential | 0 |
| Open Badge | 0 |
| Professional Doctorate | 0 |
| Quality Assurance Credential | 0 |
| Research Doctorate | 0 |
| Secondary School Diploma | 0 |
| Completed/Exited | 25 |
| 3 Exited - Unsuccessful Completion | 3 |
| 1 Exited - Moved to another Program | 1 |
| 1 Exited - Successfully Employed | 1 |
| 22 Successful Completion | 22 |
| Success Stories | 1 |

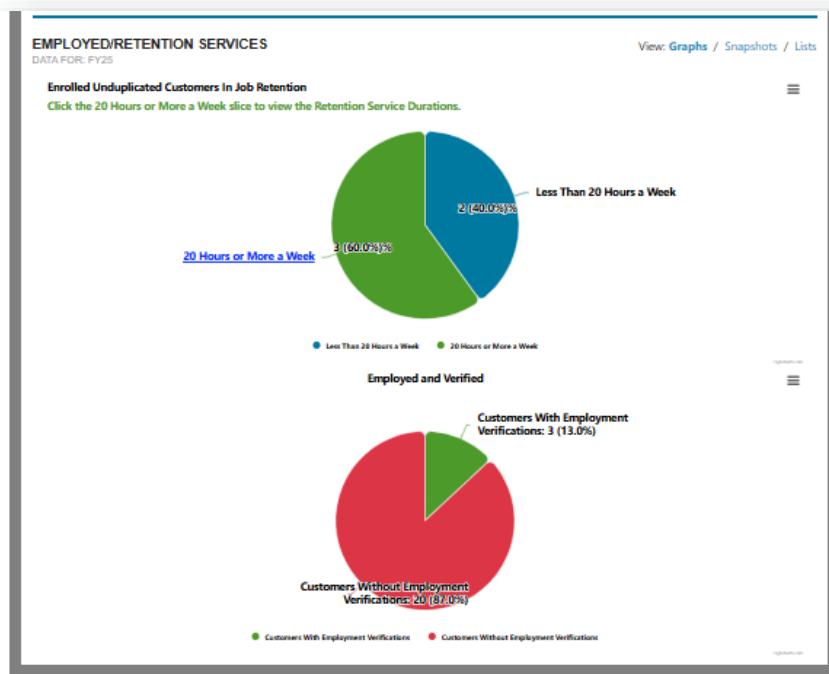
Clicking on the list view will give a list count of each type of possible skill gain, credential, and exit reason.

*Note: All data displayed in the dashboard is dependent on the data an organization enters into the system. For example, an Associates degree is not an official SNAP E&T Activity and is optional to enter in ISETS. However, credentials and skills gains for SNAP E&T activities is required.

More information on ensuring the accuracy of Provider data is outlined in another section.



The Employed/Retention graph shows unduplicated customer counts of how many customers have gained employment in the FY and what percentage are under or over 20 hours/week. The second graph shows how many employment instances entered have verifications and how many do not. Clicking on the List view for Employed/Retention Services will give a count of customers with Employment placements entered, those who are receiving Retention services, the duration, and the wage ranges.



EMPLOYED/RETENTION SERVICES

DATA FOR: FY25

23 Employed and Verified

- 3 Number of customers with employment verifications
- 20 Number of customers without employment verifications
- 20 Employment Verifications that need approval

1 Need Employment Verification For SS Issued For Retention Services

23 Wage Ranges

- 0 \$5.00 to \$11.00 Per Hour
- 3 \$11.01 to \$15.00 Per Hour
- 12 \$15.01 to \$20.00 Per Hour
- 5 \$20.01 to \$25.00 Per Hour
- 2 \$25.01 to \$30.00 Per Hour
- 0 \$30.01 to \$35.00 Per Hour
- 1 \$35.01 to \$40.00 Per Hour
- 0 \$40.01 to \$45.00 Per Hour
- 0 \$45.01 to \$50.00 Per Hour
- 0 \$50.01 to \$55.00 Per Hour
- 0 Over \$55.00 Per Hour

3 Retention Service Duration

- 0 30 to 59 Days
- 0 60 to 89 Days
- 0 90 to 100 Days
- 3 101 to 334 Days
- 0 Within 30 days of 365th day of Retention

0 Employment - Post Exit

Best Practice

Make it a part of your routine to check the dashboard and the progress of customers in Job Retention. Providers are required to do the following:

- Contact customers at least every 30 days through 90 day JR and add case notes
- Upload employment verification within 90 days of a customer gaining employment
- Upload additional employment verification within 30 days of a supportive service being given to a customer in JR365.



Best Practice

A Best Practice is to enter data as it happens (or as you receive it). Entering data in a once weekly or monthly session is not recommended. This ensures that the data in the system is up-to-date on any given day and that data entry is not an arduous task but simply part of the day-to-day use of the system.

IDHS will consider data in ISETS as Official. Any supporting documentation or reports submitted outside of ISETS will be considered as unofficial. If you make a mistake, correct it as soon as possible and if you need help to correct some data, please request help (see the Help Request section of this manual). A good rule of thumb is: **“If it isn’t reflected in the ISETS system, it officially didn’t happen”**.



Viewing and Editing Customer Information

Customer data is imported on the 5th, 13th, 20th and 27th of each month at 12pm. This data comes from IES and is considered current.

It is the policy of IDHS that any customer data which needs to be updated **MUST** be reported directly to IDHS by the customer. Customers may do this by accessing their [ABE](#) (Application for Benefits Eligibility) account and submitting an update. Alternately, customers may contact an FCRC directly to officially change their contact information with IDHS. Name changes require a [IL444-2149](#) form and must be completed by the customer. Any changes that take place will be entered into IES and then transferred to ISETS upon the next data import. We strongly recommend Providers enter a case note into ISETS when a customer changes their contact information lest that change take some time to take effect and anyone viewing the customer record can see the updated information in the meantime.

Finding a customer in ISETS

1. After you log into ISETS the default page is the “Customers” page.
2. If you want to add a customer to a Provider’s case load, first look for a customer in the IES data (imported from IES twice a month), click the “Search IES Customer” button on the right.
3. A popup box will appear like the one to the right.
4. You must type a first name and last name. Please ensure that both names are spelled correctly.
5. You must also add one or more of the other fields to get a more specific match. Individual number is the best way to ensure that you find the correct individual you are looking for. Dates of birth must be two digits for the month and day and four digits for the year.
6. Click the “Search for IES Customer” button.



7. If you receive a message like the one to the right, it means that the person you searched for was found but that the data suggests they are most likely ineligible. In order to verify this, you should look them up in IES and confirm. Providers may contact their Provider Manager to verify eligibility before performing intake in this case.
8. If you would like to add a customer to an agency's ISETS customer list even though they were not in the IES data set, you can enter their email address and click "Search for ISETS account". *Note: this searches Illinois WorkNet for an existing IWN account associated with that individual.
9. If you receive a message like the one to the right, the customer has been found in the IES data and you should continue by entering their email address and click the "Search for ISETS account" button.

Must Do

If a customer is not found in the IES data, please double check the spelling of their name, case/individual number, and birth date. This information must be an exact match to the data in IES to sync appropriately later. If you still cannot find the customer in the IES data and you have checked IES to verify their personal information, IDHS staff may submit a Help Request ticket to notify ISETS staff the data is missing.

IES MATCH FOUND - NOT ELIGIBLE FOR E&T SERVICES

Sorry, your customer is listed as not currently eligible for E&T services. Please either assist the customer in applying for benefits or check for a pending application by logging into the customers ABE account. Please complete the assessment, but you will not be able to enroll the customer in E&T benefits at this time.

Aaron Rice matched with information in IES. This information is available on the ISETS overview tab for this person. Enter remaining information to search for an ISETS account.

Case Number: 123456789

SSN Last 4: 1234

Individual Number: 123456789

Enter the following information.

First Name *: Aaron

Last Name *: East

Date of Birth *: 12/34/2000

Zip Code *: 60601

No Email Address ☐

Email *:

Confirm Email *:

[Search for ISETS account](#)

IES MATCH FOUND

This search will use the customer's IES information to look for an ISETS account.

Aaron Radcliff matched with information in IES. This information is available on the ISETS overview tab for this person. Enter remaining information to search for an ISETS account.

Case Number: 123456789

SSN Last 4: 1234

Individual Number: 123456789

Enter the following information.

First Name *: Aaron

Last Name *: East

Date of Birth *: 12/34/2000

Zip Code *: 60601

No Email Address ☐

Email *:

Confirm Email *:

The Confirm Email field is required.

[Search for ISETS account](#)



10. If you receive a message like the one to the right, the customer has not been found in the IES data. IDHS Staff may create a new customer file in ISETS by entering the information as it appears in IES. This should only be done if a customer is eligible for SNAP E&T. If the data is entered exactly as it is in IES, upon the next sync, the data will not conflict.

IES MATCH NOT FOUND

John Smith was **not found in IES**. Complete the information below to continue in order to submit a referral for SNAP E&T participation.

First Name * John

Last Name * Smith

Date of Birth * 03/10/1978

Zip Code *

No Email Address ☐

Email *

Confirm Email *

Continue

11. Then, once the customer is added to ISETS, you will see a confirmation screen where you can assign the customer to a provider. Choose the Program, Provider, and IDHS Location and click "Assign to Provider and Search Assessments".

ISETS ACCOUNT CREATED/UPDATED

John Smith will be able to access this information using the Illinois workNet account listed below. Continue with Assessment Search.

Username JSmith540

Password Smith031078

Status ISETS Profile Created

Select Program Select a Program

Add to Agency Select a Provider

Add to IDHS Location Select a IDHS Location

Assign to Provider and Search Assessments

12. Instruct the Provider staff to search for the customer you just added and proceed with an assessment and referral.



1. To search for a particular customer you know is already in ISETS, type their name, case number, or individual number in the appropriate fields and click the “Search” button.

*Note: Exact spelling is not required; if you use a first initial and last name the results will show a list of customers in ISETS which are a close match. You can select the customer that is the correct one from the list.

2. To see a list of all customers already associated with an agency, choose that agency from the “Intermediary/Provider” dropdown and click the “Search” button.
3. You will see a list of customers below.
4. To view a customer’s record, click on their last name which is blue and links to their customer record.

The screenshot shows the ISETS search interface. It includes fields for Name, Intermediary/Provider (a dropdown menu), Include FCRCs (checkbox), Case Number, Individual Number, IwN Number, and Select Program Enrollments(s). Below these fields is an 'Advanced Search' section with 'Search', 'Export', and 'Reset Filters' buttons. A red arrow points to the 'Search' button.

The screenshot shows the search results table. A red arrow points to the 'Last Name' column. The table lists customer records with various details.

| Last Name | First Name | Provider | Fiscal Year | Assessment Date | Enrollment Date | Exit Date | E&T Status / SNAP Status | Recert. Month / Mid Date | County / ABAWD |
|-----------|------------|---------------------------------|-------------|-----------------|-----------------|------------|---|--------------------------|----------------|
| East | Adam | Multiple Providers | 2025 | 11/15/2024 | 10/25/2022 | 06/30/2024 | Active Eligible | February N/A | N/A No |
| Garrett | Monzo | Multiple Providers | 2023 | 08/29/2022 | Not Enrolled | Not Exited | Referral Rejected Eligible | July N/A | Jackson Yes |
| Miller | Ar | Asian Human Services of Chicago | 2022 | 06/20/2022 | Not Enrolled | Not Exited | Not Enrolled Eligible | July N/A | Jackson No |
| Smola | Andrea | Asian Human Services of Chicago | 2025 | 08/22/2024 | 06/27/2024 | 08/15/2024 | Not Enrolled Eligible | April N/A | Jo Daviess Yes |
| Quick | Angela | N/A | 2022 | 05/25/2022 | Not Enrolled | 06/30/2023 | Pending Referral Approval Pending Application | April N/A | Cook Yes |



5. A new tab will open with the customer record. The default view is the “Overview” tab.
6. You will find Profile information on the left-hand vertical menu and quick links below that.
7. Any section with a light blue color is expandable but will be collapsed by default to save space.

Referrals Section

You will find Referrals in the Referrals section. Please refer to the [Making and Processing Referrals section](#) in this manual for more information about these.

Status Section

Status information about a customer’s E&T involvement is in the Status section. This section includes the redetermination date for their SNAP case, the status of their involvement in SNAP E&T, the completion and date of their last assessment, level of progress, employment verification, SNAP Case Number, SNAP Eligibility status, and Individual Number. You may also see the SNAP Benefit amount here for some customers (Earnfare).

Fields which should be kept up to date by the Provider regularly are the E&T Status, Level of Progress, and Employment Verification fields. If one of these fields has a yellow triangle icon next to it, as above, that indicates that this field needs to be updated.

SNAP Eligibility Status and Benefit Amount should only be updated by IDHS staff.

Best Practice

If a customer is injured, sick, or otherwise needs to take a break from SNAP E&T, Providers can use the “Inactive” status. This should be for a maximum of 30 days as a best practice. However a customer is allowed to be marked as “Inactive” for longer. It is recommended that the Provider Exit the customer if they have been marked as “Inactive” for more than 30 days. All Earnfare customers should be exited at the end of the program year/fiscal year .

If a customer leaves SNAP E&T and is Exited, then returns to SNAP E&T later (45 days or more after exit), a new referral, new enrollment, and new activities must be added.



Status Definitions

- **Inactive:** still enrolled officially in SNAP E&T but not participating (no attendance) temporarily. This field is only used for a maximum of 45 days after which this status needs to be changed. (limited to 30 days)
- **Active:** actively attending SNAP E&T Activities. Must have an “Open/Started” SNAP E&T Activity on their EP.
- **Exited:** No longer enrolled in SNAP E&T.
- **Retention:** Employed and participating in Job Retention services.
- **Pending Referral Approval:** referred but not accepted yet.
- **Wait List:** eligible but not enrolled in a program because the program is at capacity. (limited to 30 days)
- **Never active:** a customer was possibly recruited, assessed, and/or referred but never active in any SNAP E&T Activities.
- **Referral Rejected:** a referral was made but rejected.
- **Not Enrolled:** (default status) customer has not yet been enrolled in SNAP E&T.
- **IES Matched:** the customer was matched with IES (this is a temporary status used during the enrollment process only).
- **Initial Assessment Complete:** the customer has an initial assessment completed (this is a temporary status used during the enrollment process only).
- **Pending Activity Start Dates:** the customer has been enrolled but no activities have been started yet (this is a temporary status used during the enrollment process only).
- **Consent Revoked:** the customer has revoked consent for participation in the SNAP E&T program.

Integrated Resource Team Section

This section allows Provider & IDHS contacts to be added to a customer’s Integrated Resource Team (IRT). An IRT is the group of professionals working collaboratively with the customer and with each other to ensure the customer’s success in moving toward self sufficiency and meeting their goals. Anyone having contact with the customer or who might need to be notified via email of changes should be added to the IRT. Even contacts from other Providers who are working with the customer may be added to improve coordination. Anyone added to the IRT can be emailed copies of case notes.

To add a team contact to a customer record, in the Overview page:

1. Click the dropdown menu,
2. select a person from the list and
3. click “Save”.

The screenshot shows a web interface titled "Integrated Resource Team". Below the title is a section labeled "Action Item". Inside this section, there is a task labeled "1. Add Integrated Resource Team Contacts". Below this task is a dropdown menu with the word "Select" and a downward arrow. To the right of the dropdown menu is a "View" link. At the bottom left of the form is a blue "Save" button. A large red arrow points from the right side of the screen towards the dropdown menu.

Provider Managers who would like to be added to their Providers’ IRTs must go to each customer record and add themselves. If a Provider Manager is no longer working with a Provider, they must remove themselves from all IRTs for that Provider.



Attendance Section

This section allows a Provider to add an individual's attendance to their record. A Group Attendance Tool (best for entering a group learning session or orientation) is also available. To use this, click on the "Group Attendance Tool" button. Attendance may only be entered for an activity in which the customer has been enrolled and has an "Started/Open" status and a start date.

Attendance

Activities display if start and end date are both within the dates you enter.

[Group Attendance Tool](#)

Start Date End Date

Provider

Activity

[Search](#)

Attendance may be entered by any Provider staff (or instructor) in ISETS or by customers in their Illinois workNet account. All attendance **must** be verified by authorized Provider staff to ensure that attendance is correct before saved as a final record.

Paper copies may be kept by a Provider but is not required to be uploaded to ISETS. A copy of attendance may requested by IDHS in the case of an audit. Therefore IDHS recommends Providers keep a copy at their facility in case these records are requested.

Attendance for Earnfare

Attendance for Earnfare customers must be entered separately for the Community Workfare Activity and the Transitional Job Activity. Progress toward completing required hours is calculated based on attendance and participation limits are calculated based on the number of months which include Transitional Job attendance hours.

ISETS [workNet](#)

DASHBOARDS CUSTOMERS HI, AGRABEMEYER

Profile: Andre Hughes

Email

DOB

User Name

Last 4 SSN

Individual Number

Redetermination Date

Primary E&T Provider

Secondary E&T Provider N/A

DHS Office

Program Enrollment Earnfare

[See All](#)

[Reset Password](#)

Participant Summary Tools

[Assessments](#)

[Case Notes](#)

[Services](#)

Referrals

Status

⚠ Redetermination Date: 4/17/2023
[Link to: ABE - Manage My Case](#)

✅ E&T Status: Active Modified By: LaDonna Sutton
Date Modified: 11/17/2022

✅ Universal Assessment: Complete 11/17/2022

✅ Level of Progress: Acceptable Progress/Particip

✅ Employment Verification: Not able to verify employee

✅ SNAP Case Number:

✅ SNAP Eligibility Status: Yes Modified By: LaDonna Sutton
Date Modified: 11/17/2022

⚠ Individual Number:

EARNFARE PARTICIPATION

✅ Benefit Amount: 281.00 Modified By: DReinhardt
Date Modified: 2/9/2023

⚠ Monthly Benefit Hours: 21

Earnfare Work Hours

Community Workfare Hours - 0 / 21

0%

Transitional Job Hours - 0 / 35

0%

[Save](#)

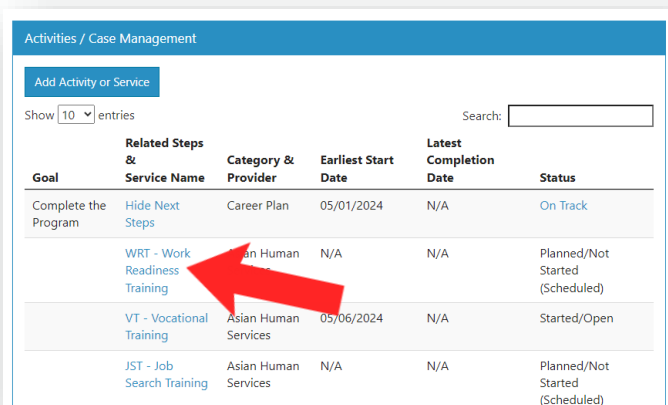


Activities/Case Management Section

This section contains the customer's Employment Plan (EP) Goals and the Activities or Services related to those goals. When first enrolled, a default goal is added to the EP to get a EP started. The goal is usually something generic like "Complete the SNAP Program" as seen here. Activities which are selected during enrollment (see Enrolling Customers later in this manual) are automatically added to this default goal with the status "Planned/Not Started" as seen below. Additional Activities and Services may be added after the initial enrollment. For instructions on how to do that, please see the sections in this manual referring to Adding and Managing Activities or Services in the Provider manual.

Activities and Services will automatically be ordered chronologically with the most recent start date at the top.

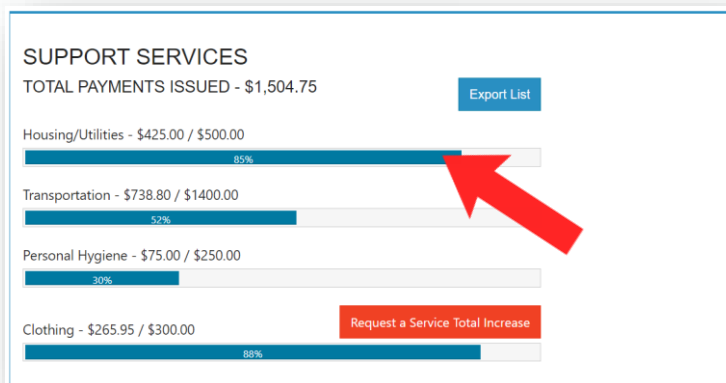
Clicking on the blue linked text will take you to that activity in the customer's EP. From here you can edit this activity. More about editing Activities in the section on Managing Activities in the Provider Manual.



| Activities / Case Management | | | | | |
|------------------------------|---|----------------------|---------------------|------------------------|---------------------------------|
| Add Activity or Service | | | | | |
| Show 10 entries | | Search: | | | |
| Goal | Related Steps & Service Name | Category & Provider | Earliest Start Date | Latest Completion Date | Status |
| Complete the Program | Hide Next Steps | Career Plan | 05/01/2024 | N/A | On Track |
| | WRT - Work Readiness Training | Asian Human Services | N/A | N/A | Planned/Not Started (Scheduled) |
| | VT - Vocational Training | Asian Human Services | 05/06/2024 | N/A | Started/Open |
| | JST - Job Search Training | Asian Human Services | N/A | N/A | Planned/Not Started (Scheduled) |

Support Services Section

This gives an overview of the Supportive Services issued and their totals. Click on the blue graph in order to view details of each instance/payment. More about editing Services in the section on Managing Support Services.





An additional detailed summary can be found in the “Summary Tools” tab at the top of the Customer Record. Providers may request an Override to exceed the recommended maximum amount on any Support Service. Those must be [approved by an IDHS Manager](#).

Outcomes Sections

Milestones

This section is a table that lists different potential milestones a SNAP E&T customer may reach during their participation in the program. All of these are not required.

Completed/Exited Section

This section is where a Provider may exit a customer from their SNAP E&T program.

1. First all activities must be completed. If any activities are “Planned/Not Started”, those must be deleted from the EP to proceed with exiting a customer. If this has not been done you will see a red message saying this.
2. The Provider should choose the Program/Provider from the Program dropdown list
3. Choose an exit status from the “Program Completion Status” dropdown list.
4. Add the “Program Completion Date”.
5. Click “Save”.

ISETS SUMMARY TOOLS

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

SUPPORT SERVICES SUMMARY

Profile: Everett Bernard

Support Services
TOTAL PAYMENTS ISSUED - \$41.00
Transportation - \$41.00 / \$1400.00
2%

Export List

SUPPORTIVE SERVICE DETAILS
Select a supportive service in the graph to view the details below.

| OUTCOMES | | |
|---|--|--------------|
| Action Item | Result | Status |
| 1. Successfully completed a SNAP E&T Activity. | An Activity was Completed Successfully | Complete |
| 2. Gained a credential. | Not Completed | Not Complete |
| 3. Gained employment. | At least 1 employment entered. | Complete |
| 4. Retained employment for 90 Days. | Not Completed (Currently: 65 Day(s)) | Not Complete |
| 5. Exited from program. (Successful/Unsuccessful) | Not Completed | Not Complete |

Completed / Exited

Credentials Earned

Employment (POST-EXIT)

Completed / Exited

This is an automatically updated checklist based on your provider. Once all provider activities have been completed, you can exit the customer.

☐ All SNAP E&T Activities (not including Supportive Services) have a completion status (successful/unsuccessful) or have been removed.

☐ At least 1 Measurable Skill Gain has been entered.¹

☐ All Industry Recognized Credentials are entered into the system.^{1, 2}

¹ These are not required to Exit the Customer but are helpful to gauge success of the program.
² Credentials must be the Industry Recognized Credential to count for Performance. Make sure you have all your supporting documentation in the file.

Program: SNAP 2 Success - Asian Human S

Program completion status: Select

Program Completion Date: Select

Save

Show 5 entries

Search:

| ISETS Program | Provider Name | Exit Status | Exit Reason | Date Exited | Exited By |
|----------------------------|---------------|-------------|-------------|-------------|-----------|
| No data available in table | | | | | |

Showing 0 to 0 of 0 entries

Previous Next

More about Exiting customers in the section on Exiting Customers in the Provider Manual.



Credentials Earned Section

This section is where a Provider may enter a credential a customer has earned while participating in SNAP E&T. Adding credentials earned during SNAP E&T participation is mandatory reporting.

1. To add a credential, click the “Add Credential” button.

Credentials Earned

[Add Credential](#)

Show entries

Search:

| Name | Credential Type | Date Attained | SOC Code | Occupation | CIP Code | Edit Credential | Remove Credential |
|----------------------------|-----------------|---------------|----------|------------|----------|-----------------|-------------------|
| No data available in table | | | | | | | |

Showing 0 to 0 of 0 entries

Previous Next

5. A new popup window will open labeled “Add/Edit Credential”.
6. Add all information about the credential and click the “Save” button.
7. SOC Codes and CIP Codes are used to determine the industry and occupation the credential pertains to.

Title *

Institution *

Date Earned *

Credential Type *

Credential Source *

[First, lookup SOC Codes and Occupations](#)

[Second, lookup CIP Codes](#)

SOC Code *

Occupation *

CIP Code *

[Save](#) [Close](#)

Measurable Skills Gained Section

This section allows a Provider to add skills gains (any increase in skills gained while participating in the SNAP E&T program). Adding skills gained during SNAP E&T participation is mandatory reporting.

Incomplete reporting of these measures during the program year will be considered when evaluating Provider performance and whether to award future contracts.

Measurable Skill Gains

Skill Type *

Program Year

Filter Start Date

Filter End Date

[Filter](#) [Add Measurable Skills Gain](#)

entries per page

Search:

| Skill Type | Date Attained | Comment | Program Year |
|----------------------------|---------------|---------|--------------|
| No data available in table | | | |

Showing 0 to 0 of 0 entries



1. To add a skills gain, click the “Add Measurable Skills Gain” button.

ADD MEASURABLE SKILL GAIN

Select Skill Type *

Skills Progression/Diploma/Certificate/Degree

Select Skill Type

Educational Functional Level(EFL)

Secondary Transcript/Report Card

Postsecondary Transcript/Report Card

Training Milestone

Skills Progression/Diploma/Certificate/Degree

Date Attained *

Comment *

Save Close

5. A new popup window will open labeled “Add Measurable Skill Gain”.
6. Add all information about the various skill gains and click the “Save” button.
7. Skills that require assessment or test results will contain links to add those assessment results. Skills gains of these types are automatically calculated when entered.

Employment Section

This section allows a Provider to add an employment placement (any employment gained while participating in the SNAP E&T program). This section also provides a quick link to the Employment Notification form. This form is used to notify IDHS/an FCRC of a customer’s employment and revised income so that we can budget the income, which may affect the customer’s benefits. For more about adding and managing employment see the section in the Provider manual on Adding and Managing Employment & Retention.

Employment

Add Employment

IDHS CONTRACT REPORT-NOTIFICATION OF EMPLOYMENT RETENTION (IL444-3085 Form)

Show 10 entries

Search:

| Employer | Industry | Job Title | Start Date | End Date | Benchmark |
|----------------------------|----------|-----------|------------|----------|-----------|
| No data available in table | | | | | |

Showing 0 to 0 of 0 entries

Previous Next



Editing Customer Information

Currently most customer information such as name, address, phone, email, case number, individual number, redetermination date are all provided to ISETS by IES. This data is imported on the 5th, 13th, 20th and 27th of each month at 12pm. To ensure the accuracy and integrity of this critical data for IDHS the only place where edits take place is in the Integrated Eligibility System (IES). To make changes to this information a customer must report changes directly to IDHS through the [ABE](#) (Application for Benefits Eligibility). Then when the next import to ISETS happens (possibly up to 2 weeks) the data will be updated in ISETS.

Information which can be edited includes any assessments, referrals, enrollments, activities, services, or case notes you enter in ISETS regarding a customer. Most information retains a historical record of past entries to ensure data integrity, but if you make changes the most recent version will show and that is the version you should review.

In the case of assessments, these should be updated every 12 months at least and reviewed at least every 6 months. Multiple providers may be working with a customer so before you take the time to do a new assessment with a customer, ensure that another provider hasn't already entered a more recent version. More on this in the next section (Assessments).

Best Practice

Whenever you receive information that a customer's contact or other information has changed, enter a case note with the new data and the date the change occurred.



Assessments

The first step in the customer intake process is for the Provider or the FCRC to complete a universal assessment (depending on where the customer enters the process). This assessment will allow you to view recommended providers/programs and make referrals to providers. An assessment must be done in order to send a referral and enroll a customer.

The Universal Assessment was developed specifically for IDHS/ISETS and is conveniently structured in two parts:

1. The Initial Screening – this part of the assessment contains all critical information to determine a customer’s basic eligibility and suitability for enrollment into SNAP E&T.
2. The Needs Assessment Survey – this part of the assessment contains additional information that may be necessary for specific program entry, employment placement, and/or persistence and successful completion of a program. It gives the Provider more context and information about how to best serve the customer including identifying supports the customer may need.

Both parts may be completed inside ISETS or using the paper version of the form (5179) which can be entered into ISETS later.

Any assessment submitted to WFD by an FCRC which does not have the first page completed cannot be entered into the Initial Screening and therefore will be returned to the FCRC.

ISETS APPLICATION

UNIVERSAL ASSESSMENT

INITIAL SCREENING

[Start Screening](#)

Complete an initial screening as part of the eligibility and referral process.

NEEDS ASSESSMENT SURVEY

Complete a more in-depth assessment to identify participant goals, needs, and next steps.

Best Practice

We strongly recommend that both parts of the Universal Assessment be completed for every customer Providers work with. The Initial Screening at least must be done in order to send a referral. The Needs Assessment Survey may be completed by the Provider later after the customer is verified as eligible and is enrolled in a program. The Assessment Form (5179) that comes from an FCRC to WFD must have the first page completed in order to complete the Initial Screening and send a referral.



If this is a new customer, follow the instructions for searching IES and adding the new account for the customer. If this is a new account, or if you are adding the customer to ISETS from IES for the first time, you will see a screen like this:

ISETS ACCOUNT CREATED/UPDATED

Shekela Wallace will be able to access this information using the Illinois workNet account listed below. Continue with Assessment Search.

| | |
|----------|------------------------------|
| Username | SWallace |
| Password | N/A - Account already exists |
| Status | ISETS Account Found |

Search Assessments

Complete the Initial Screening

1. Click on the “Search Assessments” button. This will take you to the Universal Assessment page.
2. Click on the blue “Start Screening” button.

UNIVERSAL ASSESSMENT

INITIAL SCREENING

Start Screening

Initial screening as part of the eligibility and referral process.

NEEDS ASSESSMENT SURVEY

Complete a more in-dept assessment to identify participant goals, needs, and next steps.

3. Complete each section of the Initial Screening. As sections are completed the row across the top will show the progress and the current section.



4. Review the information. To make edits, click the section (remember blue bars and text are links) and make your changes. Make sure you save the information before leaving the page.
5. On the last tab, click Submit Application.



To locate if an existing customer already has an Initial Screening completed, go to that customer's record and look at the Status section. You may also click on the Intake/Referral tab. The "Complete Universal Assessment (UA) & View UA History" section should be expanded by default as shown below.

If there is already an Initial Screening with a date within the last 12 months, no additional assessment is needed, the Provider should simply review the assessment that is there with the customer and determine if updates need to be made. If there is a yellow icon, it means that the assessment needs to be updated or completed soon. If there is a red icon, it means the assessment needs to be completed or updated and it is overdue. Please bring this to the attention of your Provider.

If the Assessment Form (5179) is sent to WFD by an FCRC the first page is the Initial Screening and may be entered as new even if an existing assessment is listed.

If there is no assessment listed, you must complete a new one for the customer before making a referral.

Status

- ☒ **Redetermination Date:** 11/30/2024
[Link to: ABE - Manage My Case](#)
- ☒ **E&T Status:** Active [Add E&T Status](#)
- ☒ **Most Recent Case Note:** 08/05/2024 (24 day(s) ago)
- ☒ **Universal Assessment:** Initial Assessment: 03/20/2024 [Add Progress Level](#)
- ☒ **Level of Progress:** Acceptable Progress/Participat [Add Progress Level](#)
- ☒ **Employment Verification Status:**
- ☒ **SNAP Case Number:**
- ☒ **SNAP Eligibility Status:**
- ☒ **Individual Number:**

[Save](#)

ISSETS INTAKE/REFERRAL

DASHBOARDS CUSTOMERS HI, AGRABEMEYER

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

INTAKE/REFERRAL CASE NOTES(4)

Profile: [REDACTED]

Email: [REDACTED]

DOB: [REDACTED]

User Name: [REDACTED]

Last 4 SSN: [REDACTED]

Individual Number: [REDACTED]

Redetermination Date: [REDACTED]

Primary E&T Provider: [REDACTED]

Secondary E&T Provider: N/A

DHS Office: [REDACTED]

Complete Universal Assessment (UA) & View UA History

[Complete Universal Assessment with Customer](#)

Status **Screening Date** **Needs Assessment Date**

| | | | |
|---------------------------|-----------|-----------|---|
| Needs Assessment Complete | 9/13/2022 | 9/13/2022 | View Completed Assessment |
|---------------------------|-----------|-----------|---|

Showing 1 to 1 of 1 entries Previous 1 Next

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](#)



Needs Assessment

If a customer does not have the Needs Assessment completed, you will also see a red notice on the customer's Overview page in their record and also in the dashboard. The goal for Providers is to complete both the Initial Screening and the Needs Assessment within 30 days of enrolling a customer. If you see a screen like any of the ones below it means that the initial screening was completed, and the Needs Assessment was not. The number of Needs Assessments incomplete during the program year will be considered when evaluating Provider performance and whether to award future contracts.

1. Recommend that the Provider complete the Needs Assessment.

LEGEND

Customers in this color are current/active. Customers in this color require action. Customers in this color are beyond due date. Customers in this color are not enrolled.

ACTIVITIES Hide Reload

ASSESSED & EMPLOYMENT PLAN COMPLETED View: Snapshot / List

DATA FOR: FY25

4 Initial Screening

- 0 Not Complete ⓘ
- 0 Not Complete - Overdue ⓘ
- 0 Complete Not Enrolled in Program ⓘ
- 2 Complete ⓘ
- 1 Complete and the Customer has Exited/Completed Program ⓘ
- 1 Customer is not Eligible for this Program ⓘ

21 Service Needs Assessment

- 3 Not Complete ⓘ
- 1 Not Complete - Overdue ⓘ
- 17 Complete ⓘ
- 0 Complete and the Customer has Exited/Completed Program ⓘ
- 0 Not Complete and the Customer has Exited/Completed Program ⓘ
- 0 Customer with completed Needs Assessment Never En

18 Assessment Updates Needed

- 0 Not Complete - 9 to 12 Months Have Elapsed ⓘ
- 0 Not Complete - Over 12 Months ⓘ
- 18 Complete ⓘ

Status

✓ **Redetermination Date:** 4/30/2025
[Link to: ABE - Manage My Case](#)

✓ **E&T Status:** Active Add E&T Status

✓ **Most Recent Case Note:** 09/09/2024 (0 day(s) ago)

✓ **Universal Assessment:** Initial Assessment: 08/30/2024 Needs Assessment: N/A Add Progress Level

⚠ **Level of Progress:** Select Add Progress Level

⚠ **Employment Verification Status:** Select

✓ **SNAP Case Number:** 120136004

INITIAL SCREENING

✓ Screening Complete - 3/16/2021

Complete an initial screening as part of the eligibility and referral process.

NEEDS ASSESSMENT SURVEY

Start Assessment

Complete a more in-dept assessment to identify participant goals, needs, and next steps.



Making and Receiving Referrals

Referrals determine whether a Provider Partner has access to a customer's record.

Customers may be referred to SNAP E&T in two ways:

1. referral from IDHS to a Provider (Referral) or
2. referral from a Provider to IDHS (Reverse Referral).

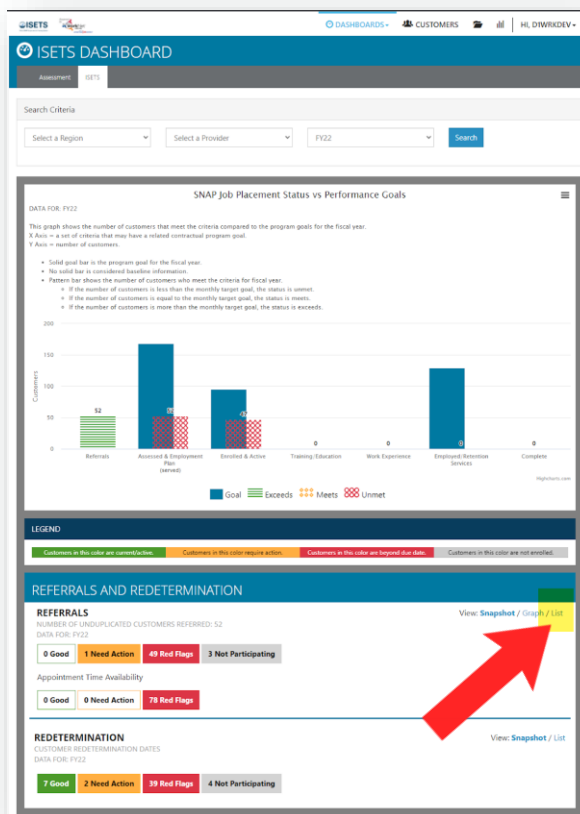
Before enrolling a customer in a SNAP E&T program, a Provider must either receive a referral from IDHS or send a Reverse Referral to IDHS. This ensures that the customer is confirmed as eligible and prevents ineligible customers from being enrolled and served.

If a customer has a referral within the last 45 days but was never enrolled, a new referral is not required. If a customer has participated in the past but has not participated in the past 45 days a new referral is also not required. However, in both these scenarios, verifying eligibility and updating the assessment is required.

Referrals will auto-expire within 60 days. The number of referrals allowed to expire may be considered in monitoring and decision making regarding future contracts.

Processing Reverse Referrals

1. Customers who have been referred to IDHS may be found in the dashboard list. Providers also receive a daily summary email of all pending referrals. Provider Managers receive a weekly email summary of all pending referrals per Provider.
2. To find reverse referrals in the ISETS Dashboard, click on the dashboard menu option at the top right of your screen and choose ISETS from the dropdown list.
3. Scroll down to the "Referrals and Redetermination" section.
4. In the upper right corner of this section, select "List" to see detailed items.





- Click the number by the row of customers you want to review. i.e. "34 Reverse Referrals Pending IDHS Response over 48 hours". This means that no one has responded to these reverse referrals for the past 48 hours (the goal timeframe is 48 hours for IDHS to accept or reject these referrals).

- A new tab will open with the list of customers.

- Click on a customer's name to go to the customer profile.

- From the Overview tab on the customer profile, check the E&T Status, the SNAP Status, the Redetermination date that were all synced from IES.

The screenshot displays the ISETS REFERRALS AND REDETERMINATION dashboard. The top section shows the number of unduplicated customers referred (90) and the data for FY25. Below this, there are several categories of referrals with counts and status indicators. A red arrow points to the '34 Reverse Referrals Pending IDHS Response over 48 hours' category. Another red arrow points to a customer's name in the list, which is highlighted in blue. The customer's name is 'Dog Two'.

The second screenshot shows the ISETS OVERVIEW page for a customer named Alesandra Anejo. The page includes a profile section with personal information, a summary of the customer's status, and a list of services. The status section shows the E&T Status as 'Active', the Universal Assessment as 'Initial Assessment: 09/08/2023', and the SNAP Case Number as '722722726'. The SNAP Eligibility Status is 'Yes'. The Individual Number is '722722726'. The page also shows the Integrated Resource Team, Attendance, Activities / Case Management, and Support Services.



9. Expand the Referrals section.
10. Click on the green “+” button to expand the referral versions. You will see all historical versions of the referral listed.
11. Click on blue number link to open the referral.

ISSETS OVERVIEW

Overview Management Customer Form Summary Tools

OVERVIEW

Profile: [Redacted]
Email: [Redacted]
DOB: [Redacted]
User Name: [Redacted]
Last 4 SSN: [Redacted]
Individual Number: [Redacted]
Redetermination Date: [Redacted]

Referrals

Add Referral

Search: [Text Box]

| # | Referred To | Referred From | Date Submitted | Referral Form | Response | Responded By | Response Date | SNAP/E&T Eligible |
|---|--------------------------------------|-------------------|----------------|-----------------------|----------|----------------|----------------|-------------------|
| 1 | Southern Illinois Collegiate (SICCM) | Williamson County | 1/31/2023 | Print | | Not Yet Marked | Not Yet Marked | Yes |

Showing 1 to 2 of 2 entries

Referrals

Add Referral

Search: [Text Box]

| # | Referred To | Referred From | Date Submitted | Referral Form | Response | Responded By | Response Date | SNAP/E&T Eligible |
|---|--|---------------------------------|----------------|-----------------------|----------|----------------|----------------|---------------------|
| 1 | Humboldt Park - Cook Counry of Chicago | Asian Human Services of Chicago | 03/20/2025 | Print | Pending | Not Yet Marked | Not Yet Marked | Pending Application |



12. You have the option to review the assessment by clicking on the “Review Assessment” button.
13. Review the reverse referral information.
14. Verify SNAP eligibility in IES.
15. If they currently receive SNAP benefits, click the “Yes” radio button for “Receives SNAP”. If not, click “No”.
16. If they are eligible for E&T services, click the “Yes” radio button for “Eligible for E&T Services”. If not, click “No”.
17. Click the appropriate Referral Status radio button.
18. Click Respond.

REFERRAL RESPONSE

[Close Referral](#) [Revoke Consent](#) [Exit Customer Referral](#) [Edit Referral](#) [Remove Referral](#)

Refer To: ☒ IDHS ☐ Provider
Humboldt Park - Cook
County - 3.6 miles at 2753
West North Avenue
Chicago IL 60647

Participant Name: Bobby Brown

Participant Username: BBrown587

Participant Birthday: 7/10/1997

[Review Assessment](#)

Refer From: ☐ Provider ☒ IDHS
Asian Human Services of Chicago -
129.8 miles at 1 College Dr. East
Peoria IL 61635

Refer From Marked By: TPrograms

Refer From Date Marked: 3/20/2025

Services Needed: ☐ Earnfare ☐ Snap 2 Success ☒ Snap Job Placement

Referral Acceptance Status: ☒ Client Assessment Completed ☐ Client Placed on Waiting List

09/08/2023 03/21/2025
Assessment Completed Date Expected Start Date

Notes:

IDHS RESPONSE

ReceivesSnap ☐ Yes ☐ No

Receives SNAP Marked By: Not Yet Marked

Date Marked: Not Yet Marked

ETServicesEligible ☐ Yes ☐ No

Eligible for E&T Services Marked By: Not Yet Marked

Date Marked: Not Yet Marked

REFERRAL STATUS

ReferralStatus ☒ Pending ☐ Accepted ☐ Rejected - Not Eligible for E&T Services

Marked By DHS: Not Yet Marked

Date Marked By DHS: Not Yet Marked

Active Customer Consent for the provider selected and current customer has been obtained

[Respond](#) [Print -970 Referral Form for Customer](#)



Making Referrals to Providers

1. Customers who have been referred to WFD by an FCRC will have a Referral Form (5179) sent via email to the Regional Mailbox. Your manager will determine how processing these referral emails will be distributed.
2. Open and review the Referral Form ([5179](#))
3. If the form is complete, go to IES and ensure the customer is eligible.
4. Then Log into ISETS and search the IES data for the customer (instructions on how to do this are in the Viewing and Editing Customer Information section).
5. Click on the blue linked last name of the correct person and open their customer record.
6. Click on the “Referrals” section to expand that section.
7. Click on the link “Please complete the Universal Assessment before adding Referrals.”
8. The Universal Assessment page will open. Click on the blue “Start Screening” button.

The screenshot shows the ISETS OVERVIEW page with the Referrals section expanded. A red arrow labeled '6' points to the 'Referrals' tab. Another red arrow labeled '7' points to the link 'Please complete the Universal Assessment before adding Referrals.' Below this, the Universal Assessment page is shown with two options: 'INITIAL SCREENING' and 'NEEDS ASSESSMENT SURVEY'. A red arrow labeled '8' points to the 'Start Screening' button under 'INITIAL SCREENING'.

9. Complete the initial screening using the data in the Referral Form from the FCRC.
10. When finished, select the “View recommended providers and send Referrals” button

The screenshot shows a dialog box titled 'SELECT YOUR NEXT STEP' with five buttons: 'View recommended providers and send Referrals', 'Complete/Edit Needs Assessment', 'Send/Reply Referrals', 'Add Activities & Services for your location', and 'Mark the customer as not eligible or not participating'. A red arrow labeled '10' points to the 'View recommended providers and send Referrals' button.



11. A pop-up screen will appear with a list of available Providers that match with the customer's assessment. Choose one and click on the blue bar to expand the program information.

12. To view more information, click the blue "View Program" button on the right side.

13. To make a referral, click the blue "Send Referral" button. A new tab will open with a new referral open. Ensure that the correct Provider is selected and click the blue "Submit for Customer Consent" button.

14. A window will open with the Customer Consent form. Click the box next to the statement: "I attest that the uploaded form contains a customer signature".

15. A window will open for you to upload the signed Referral Form, add a description such as "5179 from South FCRC". And click "Upload".

RECOMMENDED PROGRAMS, ACTIVITIES, AND SERVICES

The following providers are recommended based on information provided by the Universal Assessment/Screening and Needs Assessment. 0

1. Review the program information.
2. Once the program is decided upon, select the Add Activities/Services button to start building an RP.
3. Use the Referral button to send a referral to the provider.
4. This modal may open new tabs to access added activities and services. You may need to allow pop-ups for this site.

Show 0% matches

25% Match - Benton Township (1 Program(s) Found)

25% Match - Harrisburg Township (1 Program(s) Found)

25% Match - Asian Human Services (1 Program(s) Found)

Asian Human Services - 2838 W. Peterson Chicago IL 60659

Match: 25%

Match Reason: Interest in Professional/Technical Plan Activities: JR - Job Readiness, SI - Supervised Job Search, VT - Vocational Training, BE - Basic Education (ABE/GED), JRS - Job Retention Services, E - Employment (subsidized or unsubsidized), Self Employment, CS - Community Service, IT - Job Search Training, ES - English Language Acquisition

Program Name: SNAP Job Placement

Fiscal Year: 2023

What are the goals of this program? Classroom instruction, V

How is this training offered? Classroom instruction, V

What are the minimum requirements to enter the program? English

Address: 2838 W. Peterson Chicago, IL 60659

Distance: 30 Miles

Send Referral View Program

REFERRAL FORM - (A NEW REFERRAL IS BEING CREATED)

Refer To: ☒ Provider ☐ IDHS (Reverse Referral)

Asian Human Services - 117.2 i

Participant: Thomas, Adrian

Being Referred: AThomas35

Participant Username: AThomas35

Participant Birthday: 9/25/1982

Review Assessment

No Active Customer Consent. Provider selected has been found.

Submit for Customer Consent Submit

CUSTOMER CONSENT: (ADRIAN THOMAS)

If you do not understand something or have questions, be sure to ask.

I hereby authorize (Asian Human Services - 117.2 miles at 2838 W. Peterson Chicago IL 60659) to view Employer Training Program information for the purpose of providing me with service coordination. Information entered into this system will be disclosed to Department of Human Services only as necessary in order to administer the service coordination or for audit and evaluation purposes.

I understand that I may revoke this consent at any time in writing, but that revoking it will not cancel what was already done before I revoked it. I understand that I have the right to inspect and copy the information that is disclosed. If previously revoked, this consent will terminate upon the completion of the service coordination, but in no event of exceed one year from today.

It has been explained to me that if I refuse to consent to this service coordination or if I revoke my consent during the case coordination I may not receive case coordination services. Public assistance may be affected. I understand and may, however, receive mental health services and substance abuse treatment services without agreeing to this consent.

OPTION 1 - UPLOAD A SIGNED REFERRAL FORM (SIGNED 2151, IDHS INFORMATION RELEASE FORM, PROVIDER INFORMATION RELEASE FORM)

☐ I attest that the uploaded form contains a customer signature

OPTION 2 - ENTER CUSTOMER USERNAME AND PASSWORD

Customer Username:

Password:

☐ I have read and agree to the terms

Submit Consent

UPLOAD FILE

Please upload only files that are doc, docx, xlsx, and xls files. Do not upload any files that contain a customer's full social security number.

File: Choose File No file chosen

Category: Customer Consent

Description:

Upload



16. Ensure all information on the referral is correct, and add any other notes in the Notes field.
17. Select an appointment for intake if one is available.
18. Select the FCRC from which the referral came.
19. Select the appropriate radio buttons to indicate the person is receiving SNAP benefits and in Eligible for SNAP E&T.
20. Click the blue "Submit" button.
21. The Provider has 2 business days to contact a customer and 5 business days to respond and either accept or reject the referral. The Provider is then tasked with contacting the customer, confirming or rescheduling the intake appointment, and performing intake with the customer. Referrals will expire in 90 days; expired referrals may be considered when deciding whether to continue sending referrals in the future.

MAKE A NEW REFERRAL

[Revoke Consent](#)

Refer To: ☐ IDHS ☒ Provider
Asian Human Services - 2.1 miles

Participant Name: Angela Quick

Participant Username: AQuick

Participant Birthday: 8/13/1986

[Review Assessment](#)

Refer From: ☐ Provider ☒ IDHS
Humboldt Park - Cook County - .

Refer From Marked By: Not Yet Marked

Refer From Date Marked: Not Yet Marked

Services Needed: ☐ Earnfare ☒ Snap 2 Success ☐ Snap Job Placement

Notes:

ReceivesSnap ☒ Yes ☐ No

Receives SNAP Marked By: Not Yet Marked

Date Marked: Not Yet Marked

ETServicesEligible ☒ Yes ☐ No

Eligible for E&T Services Marked By: Not Yet Marked

Date Marked: Not Yet Marked

Active Customer Consent for the provider selected and current customer has been found.

[Submit](#)

Marked By Provider: Not Yet Marked

Date Marked By Provider: Not Yet Marked

Referral Acceptance Status: ☒ If accepting this referral: ☐ Client Assessment Completed ☐ Client Placed on Waiting List

☒ If rejecting this referral: ☐ No Contact From Client ☐ Referral Rejected

Notes:

Active Customer Consent for the provider selected and current customer has been found.

[Respond](#) [Print 4970 Referral Form for Customer](#)



Provider to Provider Referrals

If a Provider meets a customer who wants to participate in SNAP E&T but they do not offer services that meet their needs or interests, they may make a referral to another SNAP E&T Provider.

While Provider to Provider referrals may be rare, they are certainly allowed. Dual enrollment is also allowed as explained earlier in this manual. Customers may be enrolled with multiple providers as long as the customer is enrolled in unique SNAP E&T activities with each provider. For example, a customer cannot be enrolled in Supervised Job Search (SJS) with two different Providers.

Referral Statuses

Referrals can have several statuses. Each status grants specific access to a Provider organization that the referral is for. These are explained below:

- **Pending IDHS Response:** this is a referral to IDHS that has not yet been processed.
- **Pending Provider Response:** this is a referral to a Provider Partner that has not yet been processed.
- **Accepted:** this customer is eligible and will be enrolled in SNAP E&T.
- **Rejected:** this customer's referral has been rejected because they are either ineligible or inappropriate for the SNAP E&T program.
- **Exited:** this customer was accepted, served, and exited.
- **Closed:** this customer is no longer able to be seen on the Provider's case load for whatever reason.

Referrals may be deleted, but only in the case that the referral is a duplicate or an error. Any referrals sent remain a record of activity on the customer record and should not be deleted, but maintained as a historical record.



Enrolling Customers

After assessment is completed and a referral accepted, Providers may officially enroll the customer in the program. In order to be included on monthly reporting for your agency, the Provider must perform the enrollment for a customer. Customers may be enrolled with more than one Provider. However, each Provider must offer exclusive activities to the same customer. For example, a customer cannot be enrolled in the Supervised Job Search activity with two different Providers.

In the Intake/Referral Tab on the Customer's record, you should see the completed assessment listed with dates. Below that you will see your options for next steps. IDHS staff should not be enrolling customer on behalf of a Provider unless there is a unique need and a Help Request has been submitted for intervention. If an IDHS Super User (Admin) does need to enroll or edit the enrollment date for a customer follow these steps:

1. Click on the "Enroll and Add Activities for your Location" button.

The screenshot shows the ISETS Intake/Referral interface. At the top, there's a navigation bar with 'ISETS INTAKE/REFERRAL' and tabs for 'Overview', 'Intake/Referral', 'IEP/Case Management', 'Customer Forms', and 'Summary Tools'. The 'Intake/Referral' tab is active. Below the tabs, there's a 'PROFILE' section on the left with fields for Email, DOB, User Name, Last 4 SSN, Individual Number, Redetermination Date, Primary E&T Provider, Secondary E&T Provider, and DHS Office. The main area is titled 'INTAKE/REFERRAL' and 'CASE NOTES(4)'. It contains a 'Complete Universal Assessment (UA) & View UA History' section with a 'Complete Universal Assessment with Customer' button and a 'Printable Initial Assessment' button. Below this is a table with columns 'Status', 'Screening Date', and 'Needs Assessment Date / Update'. The table shows one entry: 'Screening Complete' on '5/9/2024'. Below the table is a 'SELECT YOUR NEXT STEP' section with four buttons: 'View recommended providers and send Referrals', 'Complete/Edit Needs Assessment', 'Send Referrals', and 'Enroll and Add Activities for your Location'. A red arrow points to the 'Enroll and Add Activities for your Location' button.

2. A box will pop open with "Recommended Programs, Activities, and Services". Find the desired agency in the list. If you don't see that agency, click on the "Show 0% matches" link in the upper right corner.

Best Practice

If you don't see the desired agency listed in the matches, it likely means either;

1. That agency isn't a good fit for this customer based on their assessment answers or
 2. That agency doesn't have enough information in the Provider Information section to match with customers.
- To remedy this, edit your Provider Information and add more details.



RECOMMENDED PROGRAMS, ACTIVITIES, AND SERVICES

The following providers are recommended based on information provided by the Universal Assessment **Screening** and **Needs Assessment**.

1. Review the program information.
2. Once the program is decided upon, select the Add Activities/Services button to start building an IEP.
3. Use the Referral button to send a referral to the provider.
4. This modal may open new tabs to access added activities and services. You may need to allow pop-ups for this site.

Show 0% matches

- 50% Match - Benton Township (1 Program(s) Found)
- 50% Match - Employment Connection (1 Program(s) Found)
- 50% Match - Harrisburg Township (1 Program(s) Found)
- 50% Match - Asian Human Services (1 Program(s) Found)
- 50% Match - CARA Program (2 Program(s) Found)
- 50% Match - Jane Adams Resource Corp (1 Program(s) Found)
- 50% Match - Springfield Urban League, Inc. (1 Program(s) Found)
- 50% Match - Two Rivers Regional Council (1 Program(s) Found)
- 50% Match - Rebuilding Exchange (1 Program(s) Found)

3. Click on the blue bar with your agency to expand the program details. If there are multiple programs, make sure you choose the correct one.
4. Click on "Add Enrollment Date".

25% Match - Asian Human Services, dba Trellus (1 Program(s) Found)

Asian Human Services, dba Trellus - 2838 W Peterson Ave Chicago IL 60659 ISETS

Match: **25%**
Match Reason: Interest in: Professional/Technical
Plan Activities: ELA - English Language Acquisition, WRT - Work Readiness Training, SJS - Supervised Job Search, CS - Community Service, JST - Job Search Training, SE - Self Employment, JR - Job Retention, E - Employment (subsidized or unsubsidized), VT - Vocational Training

| | | |
|--|--|---|
| Program Name: SNAP 2 Success | Description: At Asian Human Services (AHS), the Adult Employment Department assists individuals aged 18 and older with and economic barriers to securing a career. You start here! | Address: 2838 W Peterson Ave Chicago IL 60659 Distance: 26.4 Miles |
|--|--|---|

Fiscal Year:
2025

What are the goals of this program?
How is this training offered? Classroom Instruction, Work Experience
What are the minimum requirements to enter the program? Fluent English

Add Enrollment Date

Send Referral

View Program



5. A pop-up will appear and you can add the correct enrollment date for that customer to be enrolled with that Provider.

ADD PROGRAM ENROLLMENT

Adding a Program Enrollment for: **SNAP 2 Success**

Program Provider: **Asian Human Services, dba Trellus**

Program Enrollment Date

[Add Enrollment](#)

6. You will see the program enrollment on the customer record and the correct enrollment date.

ISETS OVERVIEW

[Overview](#) [Intake/Referral](#) [IEP/Case Management](#) [Customer Forms](#) [Summary Tools](#)

OVERVIEW

Profile: Aareon Rice

Email

DOB

User Name

Last 4 SSN

Individual Number

Redetermination Date
11/30/2024

Midpoint Date N/A

Enrollment Date 04/22/2024

E&T Provider(s) Asian Human Services, dba Trellus

Provider(s) Pending Referral
N/A

DHS Office Northside - Cook County

Program Enrollment SNAP 2 Success

[See All](#)

Referrals

Status

Redetermination Date: 2/13/2023
[Link to: ABE - Manage My Case](#)

E&T Status: Inactive

Universal Assessment: Complete 9/13/2022

Level of Progress: Not Participating

Employment Verification Status: Select

SNAP Case Number:

Individual Number:

[Save](#)

Integrated Resource Team



Enrolling a customer also adds a default goal to the customer's EP. You can see in the example the goal is "Complete SNAP JP Program". You'll notice that the goal's status is listed as "Not Started". The next steps are to open the goal and start the activities. A customer is not considered "Active" until they have a "Started/Open" SNAP E&T activity.

To edit the goal status

1. Click on the "Not Started" blue text and a window will pop up.
2. Click on the status drop down and select "On Track".
3. Click the "Save Changes" button.

In the next section you will find more information about adding and editing activities.

Note: In order for a customer to be considered "Active", they must have an activity with an "Open/Started" status on a SNAP E&T EP and a start date.

The screenshot shows the 'EDIT GOAL' interface. The 'Goal Statement' field contains 'Complete SNAP JP Program'. The 'Category' dropdown is set to 'Career Plan'. The 'Short/Long Term' dropdown is set to 'Short Term Goal'. The 'Status' dropdown is open, showing a list of options: 'Select One', 'Not Started', 'On Track', 'Off Track', and 'Complete'. The 'On Track' option is currently selected and highlighted. A 'Save Changes' button is located at the bottom right of the form.

Best Practice

If a customer is exited at any time during the program year/fiscal year, then returns after 45 days for additional services and is eligible, the Provider must perform a new intake, referral and enrollment. Previously completed Activities are locked and may not be reopened after a customer is exited. So new Activities should also be added and Started/Opened with a new start date and Planned End date.

The only exception to this rule is if the exited customer finds employment with 60 days of exit which entitles them to Job Retention services (20+ hours/week). If this is the case, the customer may be un-exited and enrolled in the Job Retention activity. Customers enrolled in the Job Retention activity are also entitled to Support Services to help them maintain employment.



Employment Plans (EPs)

It is a requirement of SNAP E&T that each customer have an EP developed in collaboration with Provider staff. In performing the assessment and enrolling your customer, parts of the EP in ISETS will be auto-populated with some information. Adding additional long-term goals and adding activities (steps) toward their goals is part of developing the EP.

1. To view the EP, in the customer record, click on the “EP/Case Management Tab”.
2. The default view is the “Add Activities/Services” tab because this is the most commonly used tab. To view an Overview, click on the “plan Overview” tab.

As previously stated in the [Enrolling Customers](#) section, when a customer is enrolled into a program a default short-term goal to “Complete the Program” is automatically added to the EP to get you started. Any activities the Provider chooses to add to the EP upon enrollment is included under that default goal.

EP CASE MANAGEMENT | ADD ACTIVITY/SERVICES - ISETS

Overview | Intake/Referral | **EP/Case Management** | Customer Forms | Summary Tools | Outcomes

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

ADD ACTIVITY/SERVICES CASE NOTES (1) ▲

Profile: Synthia Reed75

Email: SynthiaReed75@isetstest.com
Update Contact Info

DOB: 08/01/1997

User Name: SReed75524

Last 4 SSN: 2805

Individual Number: 1722722805

Redetermination Date: 11/04/2024

Enrollment Date: 06/03/2024

E&T Provider(s): Asian Human Services of Chicago

Provider(s) Pending Referral: N/A

DHS Office: Calumet Park - Cook County

Program Enrollment: SNAP Job Placement

See All

Reset Password

Most Recent Update to a Service: 06/13/2024 (85 day(s) ago)

STEP 1: Add Services / Activities

Add Activities | Add Support Services | Add Referral To Services

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

Search:

| Activity/Service | Note | Status | Last Updated | 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 PROGRAM (1)

Search:

| Activity/Service | Note | Status | Last Updated | Other Items |
|-------------------------------|------|--|--------------|-------------|
| WRT - Work Readiness Training | | Started/Open Start Date: 6/10/2024 | 06/13/2024 | |

Showing 1 to 1 of 1 entries

Previous 1 Next

© 2024 - Illinois workNet® - V: 2024.9.5.4 - ENV: TEST



To print a copy of the customer Employment Plan, click on the Plan Overview tab and click on the “View/print EP Form” button. The current EP will generate a printable version in a new tab. Click the “Print” button at the top and have the customer sign it if you need a signed copy. You can then upload it to the customer’s record if desired.

EP CASE MANAGEMENT PLAN OVERVIEW - ISETS

[Overview](#)[Intake/Referral](#)[EP/Case Management](#)[Customer Forms](#)[Summary Tools](#)[Outcomes](#)

[Plan Overview](#)[1. Review Assessment](#)[2. Set Goals](#)[3. Add Activities/Services](#)[Update Log](#)

PLAN OVERVIEW

CASE NOTES (1) ▲

Profile: Synthia Reed75

Email
SynthiaReed75@isetstest.com
[Update Contact Info](#)

DOB 08/01/1997

User Name SReed75524

Last 4 SSN 2805

Individual Number 172

Redetermination Date
11/04/2024

Enrollment Date 06/03

E&T Provider(s) Asian
Services of Chicago

[View/Print EP Form](#)

Latest Customer Plan Agreement: [No Plan Uploads Found](#)

ASSESSMENTS

DESIRED CAREER PATH

ACCOMPLISHMENTS

Overview

1. Review Assessment

2. Set Goals

3. Add Activities/Services

Update Log

[Print](#)

SNAP EMPLOYMENT AND TRAINING - INDIVIDUAL EMPLOYMENT PLAN

Client: _____ Case ID: _____
Provide...: _____ FCRC: _____
Date: 2/17/2023 IDHS Staff: _____

Employment Goals/Interests

| Section | Selected Responses |
|------------------------|---|
| Job Interest | Human Services |
| Achievable Job Goals | Gain clerical/tech skills in current position |
| Immediate Job Goals | Human Service Assistants |
| Wage Expectation | 17.00 |
| Target Employment Date | 8/1/2022 |
| Long Term Job Interest | Human Services |
| Long Term Job Goals | Human Service Assistants |
| Wage Expectation | 17.00 |
| Target Employment Date | 8/1/2022 |

Skills and Qualifications

EDUCATION

| Section | Selected Responses |
|-----------------------------------|--------------------|
| High School Diploma or Equivalent | |



5. The Provider should upload a signed EP to the customer record to indicate that the EP was developed in collaboration with the customer and that they agree to this plan. They can do this by clicking on “Uploads” the “Participant Summary Tools” menu and then click on the “Upload File” button.

Profile: Mursal Ahmadzai

Email

Update Contact Info

DOB

Last 4 SSN

Individual Number

Recert Date

E&T Provider

Program Enrollment SNAP Job Placement

See All

Reset Password

View/Print IEP/ISS Form

Latest Customer Goals/Plan Agreement (Status: Customer Agreement Uploaded/On File)

Select plan status

Save Status (Send Request)

ASSESSMENTS

Career Cluster Inventory

Not Complete

Employment 101 - Pre

Not Complete

Employment 101 - Post

Not Complete

DESIRED CAREER PATH

Career Pathway Choice

Human Services

Occupation 1

Human Service Assistants

Occupation 2

Human Service Assistants

Wage Goal (Per Hour)

17.00

See More

ACCOMPLISHMENTS

Earned Credentials: 0

Completed Goals: 1

Completed Services: 1

CAREER PLAN

| Goal | Related Steps | Category | Earliest Start Date | Latest Planned Due Date | Status |
|------------------------------|-----------------|-------------|---------------------|-------------------------|------------|
| Complete Program | Hide Next Steps | Career Plan | 7/1/2022 | 10/30/2022 | Complete |
| JRS - Job Retention Services | | | 7/1/2022 | 10/30/2022 | Successful |

4. A popup page will load.
5. Click the dropdown menu and choose “Plan”.
6. Click the “Choose File” button and upload the correct file.
7. Click the “Upload” button.
8. Return to the tab with the EP page.
9. Click on the “Latest Customer Goals/Plan Agreement Status” dropdown and update if necessary.

ISSETS - UPLOADS

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

UPLOADED DOCUMENTS

Profile: Mursal Ahmadzai

Email

Upload File

Show 10 entries

Search:

UPLOAD FILE

Please upload only .pdf, .docx, .doc, .jpeg, .png and .xlsx files under 10 MB. Do not upload any files that contain the customer's full social security number.

Category Plan

File

Choose File No file chosen

Description *

Close Upload

You will notice on the EP Overview page that all assessments are listed in the “Assessments” box. The “Desired Career Path” information is populated from the answers entered in the Universal Assessment. The “Accomplishments” box shows earned credentials, goals, activities and services which have been completed.



1. To view all assessments, click on the “Review Assessments” tab. The ISETS Universal Assessment as well as any other assessments available in ISETS are listed there. Some of these assessments are provided by Illinois WorkNet and are helpful but not required.

The screenshot shows the 'EP CASE MANAGEMENT COMPLETE ASSESSMENTS - ISETS' interface. At the top, there are tabs for 'Overview', 'Intake/Referral', 'EP/Case Management' (selected), 'Customer Forms', 'Summary Tools', and 'Outcomes'. Below these are sub-tabs: 'Plan Overview', '1. Review Assessment' (highlighted with a red arrow), '2. Set Goals', '3. Add Activities/Services', and 'Update Log'. The main content area is titled 'COMPLETE ASSESSMENTS' and includes a 'CASE NOTES (1)' link. On the left, a profile for 'Synthia Reed75' is shown with fields for Email, DOB, User Name, Last 4 SSN, Individual Number, Redetermination Date, Enrollment Date, E&T Provider(s), Provider(s) Pending Referral, DHS Office, and Program Enrollment. On the right, there are buttons for 'Add/View Assessments' and 'Summary'. Below these, a table titled 'ISETS UNIVERSAL ASSESSMENT' shows a single entry for 'Screening Complete' with a date of '5/22/2024'. At the bottom, a section titled 'ILLINOIS WORKNET ASSESSMENTS' lists various assessment categories: 'SKILLS AND INTERESTS', 'DISABILITY BENEFITS ESTIMATOR', 'EMPLOYMENT 101', 'SELF-EVALUATION', 'OBSERVATIONAL EVALUATION', and 'WORKSITE EVALUATION'.

2. To view and/or edit goals, click on the “Set Goals” tab.
3. To add a goal, click on the blue “Add Goal Statement” button.
4. Select a “Category”, choose whether it is a Short Term or Long Term goal, and select the “Status” (usually “On Track” if starting new).
5. Click the “Add Goal” button.
6. To remove a goal, click on the blue “Remove” link on the right side of that goal listed.
7. To edit a goal, click on the blue “Edit” link on the right side of that goal listed. Note: This is what you will do to change a goal from “Not Started” status to “On Track” status.
8. Click the blue “Save Changes” button.



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

Overview 1. Review Assessment **2. Set Goals** Update Log

SET GOALS

[CASE NOTES \(2\) ▲](#)

Profile: Jeffrey Whithers

Email:
[Update Contact Info](#)

DOB:

Last 4 SSN:

Individual Number:

Recert Date: N/A

E&T Provider:

Program Enrollment: SNAP Job Placement

[See All](#)

[Reset Password](#)

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. They should be realistic, measurable and attainable.

Use completed assessment information to develop goals with your customer. The customer will need to agree to the overall initial plan. If additional changes are made to the customer's goal, the customer will need to agree to the update.

[Add Goal Statement](#)

| Goal Statement | Category | Short/Long Term | Plan Services | Status |
|---------------------------|-------------|-----------------|----------------------|---|
| Complete the SNAP program | Career Plan | Short Term Goal | View | Not Started Edit Remove |

ADD NEW GOAL

Goal Statement *

Category *

Short/Long Term *

Status *

[Add Goal](#)

EDIT GOAL

Goal Statement

Category

Short/Long Term

Status

[Save Changes](#)

Adding and managing Goals, Activities, and Services on a customer's EP is the responsibility of the Provider. However, IDHS staff working with a Provider may review EPs to understand what activities and services a customer is engaged in. If any discrepancies or inaccuracies are noticed, a Provider Manager should notify their Provider that a correction is needed.

More about [Ensuring Partner Data Accuracy](#) in that section.



Adding and Managing Activities

After a Provider has enrolled a customer, they can add and edit activities. Activities are added underneath EP goals, therefore a goal must be added to the EP first before adding activities.

There are two types of activities in the system:

1. **SNAP E&T Activities:** These are SNAP E&T Activities which are included in the Illinois SNAP State Plan and have been approved by FNS (Department of Agriculture Food and Nutrition Service).
2. **Other Activities:** These are allowable activities for customers enrolled in SNAP E&T but are not officially part of Illinois SNAP E&T. Note: customers cannot be enrolled in “Other E&T Activities” exclusively; customers enrolled in SNAP E&T **MUST** be enrolled in at least one SNAP E&T Activity (Job Retention cannot be the only SNAP E&T Activity).

Each customer enrolled in SNAP E&T must be enrolled in at least one SNAP E&T Activity. In addition, a new SNAP E&T customer must be enrolled in a SNAP E&T Activity prior to starting Job Retention.

Providers can only add activity start dates which begin on the first of the month in which they were determined eligible and enrolled in the program.

To view customer activities:

1. In the Overview of a customer's record.
2. Click on the blue text with the title of the goal. That goal's activities and services will unfurl and you can then see all activities and services associated with that goal.
3. To edit that activity, click on the blue text with the title of the activity.

Best Practice

Providers should keep activities updated and make sure that estimated end dates are edited and extended if an activity goes longer than originally expected. Make sure when a customer completes an activity and moves on to a new one, Providers close out the old activity and add the new one to their EP.

| Goal | Related Steps | Category | Earliest Start Date | Latest Planned Due Date | Status |
|--------------------------|---|-------------|---------------------|-------------------------|---------------------------------|
| Complete SNAP IP Program | Hide Next Steps | Career Plan | | | Not Started |
| | JR - Job Readiness | | | | Planned/Not Started (Scheduled) |
| | SJ - Supervised Job Search | | | | Planned/Not Started (Scheduled) |
| | JRS - Job Retention Services | | | | Planned/Not Started (Scheduled) |
| | E - Employment (subsidized or unsubsidized) | | | | Planned/Not Started (Scheduled) |
| | JT - Job Search Training | | | | Planned/Not Started (Scheduled) |

Showing 1 to 6 of 6 entries

Previous 1 Next



4. You can also view and edit activities by clicking on the “EP/Case Management” tab in the customer record. Providers should add an activity by clicking on the “Add Activities/Services” tab and expanding the purple bar listing “Services/Activities” for the goal.
5. Click on the blue pencil icon next to the activity or service to see more or edit that service or activity.

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

CASE NOTES (0)

Profile: Aareon Rice

Email
[Update Contact Info](#)

DOB

Last 4 SSN

Individual Number

Recert Date

E&T Provider

Program Enrollment SNAP Job Placement
[See All](#)

[Reset Password](#)

STEP 1: Add Services / Activities

[Add Activities](#) [Add Support Services](#) [Add Referral To Services](#)

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

Search:

| Activity/Service | Note | Status | Other Items |
|--|------|---------|-------------|
| Transportation ✎ ✖ | | Not Set | |

Showing 1 to 1 of 1 entries

Previous 1 Next

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

SERVICES/ACTIVITIES FOR: COMPLETE SNAP JP PROGRAM (5)

Search:

| Activity/Service | Note | Status | Other Items |
|---|------|---------------------------------|-------------|
| E - Employment (subsidized or unsubsidized) ✎ ✖ | | Planned/Not Started (Scheduled) | |
| JR - Job Readiness ✎ ✖ | | Planned/Not Started (Scheduled) | |
| JRS - Job Retention Services ✎ ✖ | | Planned/Not Started (Scheduled) | |
| JT - Job Search Training ✎ ✖ | | Planned/Not Started (Scheduled) | |
| SJ - Supervised Job Search ✎ ✖ | | Planned/Not Started (Scheduled) | |

Showing 1 to 5 of 5 entries

Previous 1 Next

Note: To show up in a 4333 (Staffing) report, a customer must have a SNAP E&T activity with the Started/Open status and with dates that include the month the report is for. Any Supportive Service listed here which has a “\$” icon in the “Other Items” column has a cost associated with it. There are also icons for Credentials earned and Attendance that may appear in this column as well.



6. A screen will load where you can edit the activity.
7. Click on the “Status” drop-down menu and choose the correct status (usually “Started/Open” to begin with).
8. Click on the “Planned Start Date” field and choose a start date.
9. Click on “Planned Completion Date” and choose an expected end date (estimate this or choose the end of the program year: June 30).
10. Enter how many hours you are planning on engaging this customer in this activity. *Note: for time limited work requirements, this is the number of hours that will be assumed for the purposes of meeting or not meeting those requirements.
11. Add any Other Notes describing the activity.
12. Click on the “Service Provider” tab and make sure your agency is selected as the Service Provider.
13. Click on the “Update Customer Service” button.

Providers are limited to start dates beginning the first of the month in which the customer was deemed eligible and enrolled.

Note: To show up in a 4333 (Staffing) report, a customer must have a SNAP E&T activity with the Started/Open status and with dates that include the month the report is for.

The screenshot shows the 'EDIT CUSTOMER SERVICE' form for a customer named Aaron Rice. The 'Status' dropdown menu is open, and a red arrow labeled '7' points to it. The form includes fields for 'Planned Start Date', 'Planned Completion Date', and 'How many hours a week are you planning on working on this?'. There is also a section for 'Other Notes' and a 'Update Customer Service' button at the bottom right.

The screenshot shows the 'EDIT CUSTOMER SERVICE' form for a customer named Aaron Rice. The 'Service Provider' tab is selected, and a red arrow labeled '12' points to it. The form shows the 'Service Provider' section with a list of providers and a form to add a new one. A red arrow labeled '13' points to the 'Update Customer Service' button at the bottom right.



In the “Service Provider” tab the Provider should ensure they are selected as the Service Provider. Otherwise, the customer may not show in reports for their agency. If a customer is attending the Activity at a different agency/location (for example attending GED classes taught at a local Community College instead of at your agency) the Provider may search for that location in the WIOA Provider section or you may type in the information in the “Other Provider” fields.

Note: To show up in a 4333 (Staffing) report, a customer must have a SNAP E&T activity with the Started/Open status and with dates that include the month the report is for.

Note: Costs can only be added for supportive services; costs are not added under activities.

Closing Activities

When a customer completes an activity that activity is closed. A Provider must enter the actual Completion date when closing an Activity. Prior to exiting a customer from SNAP E&T altogether, all open activities must be closed.

When adding, changing, or closing activities, this constitutes a change in the EP, which requires a case note. A case note pop-up screen will automatically appear when changes require a case note.

Best Practice

If A Provider is closing activities for a customer, please ensure that if they are still participating, they still have at least 1 SNAP E&T Activity open, otherwise they will not be considered “Active” in the program. If they are not continuing to participate, the Provider **MUST** proceed with exiting the customer. Providers should never complete activities and leave a customer’s EP open without either continuing service or exiting the customer.

Best Practice

Once a customer starts an activity, **DO NOT** delete an existing activity or change the start date of the activity. This is because data related to the dates of the activity will be lost (this activity will no longer show up in the 4333 for the months they were originally in the activity).



Adding and Managing Supportive Services

After a Provider has enrolled a customer, they can add and edit services. Services are added underneath EP goals (like activities), therefore a goal must be added to the EP in order to add services. As previously mentioned in the Enrolling Customers section, when the customer is enrolled, a default goal is automatically added.

Costs can also be added underneath supportive services where costs are not added under activities. Costs should be added and dated within the month the service is issued/happens. Customers are only eligible to receive Support Services while they are enrolled and active in a SNAP E&T Activity, therefore costs may only be added for dates that coincide with an active SNAP E&T Activity.

1. A Provider can add new services by clicking on the EP/Case Management Tab in the customer record.
2. Click the “Add Activities/Services” tab.
3. Click on the “Add Support Services” button.
4. A pop-up screen will load with a list of all services.
5. To find a specific service, you can type keywords in the search bar at the top right.
6. Click on the “Add” blue link on the right side to add the service to the EP.
7. The service will now show on the list at the top of the Activity/Service page.

The screenshot displays the IEP CASE MANAGEMENT interface. The top navigation bar includes 'DASHBOARDS', 'CUSTOMERS', and a user profile 'HI, AGRABEMEYER'. The main header is 'IEP CASE MANAGEMENT' with a sub-header 'ACTIVITY/SERVICES - ISETS'. The left sidebar shows tabs: 'Overview', 'Intake/Referral', 'IEP/Case Management', 'Customer Forms', and 'Summary Tools'. The 'IEP/Case Management' tab is active, showing a sub-tab '3. Add Activities/Services'. The main content area is titled 'ADD ACTIVITY/SERVICES' and includes a 'CASE NOTES (0)' link. A profile card for 'Aareon Rice' is visible on the left. The main area shows 'STEP 1: Add Services / Activities' with buttons for 'Add Activities', 'Add Support Services', and 'Add Referral To Services'. Below this is 'STEP 2: Assign Activity/Service(s) to a Goal' with a search bar and a table of services. The table has columns for 'Activity/Service', 'Note', 'Status', and 'Other Items'. The first row is 'Transportation' with a status of 'Not Set'. A pop-up window titled 'ADD SERVICES / ACTIVITIES' is overlaid, showing a list of services with columns for 'Category', 'Service', and 'Description'. The services listed include 'Books & Training Supplies', 'Childcare/Medical', 'Clothing', 'Educational/Credential Testing', 'Housing/Utilities', 'Personal Hygiene', and 'Transportation'. Each row has an 'Add' link on the right. A search bar is at the top of the pop-up. Red arrows and numbers 1-6 indicate the steps: 1. Click 'Add Activities/Services' tab; 2. Click 'Add Support Services' button; 3. Click 'Add Support Services' button; 4. Pop-up screen with list of services; 5. Search bar; 6. Click 'Add' link.

The official published policy on supportive services can be found here:
[IDHS: WAG 21-06-11: Supportive Service Payments \(state.il.us\)](#)



7. Click the blue pencil icon.
8. A page will open where you can edit the new service.
9. You'll notice that a new service not associated with a goal will display the message "Dollar value cannot be added to a service until they are assigned to a Goal and marked as Started/Open".
10. Click on the "Goal" dropdown and choose a goal to associate this service with.
11. Click on the "Status" drop down and choose a status (usually "Started/Open").
12. Click on the "Planned Start Date" field and choose a start date.
13. Click on "Planned Completion Date" and choose an expected end date (estimate this or choose the end of the program year: June 30).

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 CASE NOTES (0)

Profile: Aaron Rice

STEP 1: Add Services / Activities

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

Activity/Service Note Status Other Items

Transportation Not Set

Showing 1 to 1 of 1 entries Previous 1 Next

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

SERVICES/ACTIVITIES FOR: COMPLETE SNAP JP PROGRAM (5)

CAREER PLAN - EDIT 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: Aaron Rice

Transportation

Dollar value cannot be added to a service until they are assigned to a Goal and marked as Started/Open

Total Subsidized days for all items: 0

Goal* Select a goal

Status* Planned/Not Started (Schedule)

Planned Start Date* Complete SNAP JP Program

Planned Completion Date*

Other Notes

Service addresses the following situations

Show More Situations

This Customer Service was updated by Andrea Grabemeyer on 12/6/2022 at 2:19 PM

Update Customer Service



10. Enter how many hours you are planning on engaging this customer in this service (if the service doesn't necessarily have an hour component, just enter 1).
11. Add any Other Notes describing details of the service.
12. Click on the "Update Customer Service" button.
13. Click on the "Service Provider" tab and make sure the appropriate agency is selected as the Service Provider.

Managing Supportive Services is the responsibility of the Provider, however IDHS staff may assist when needed.

To view costs which have been added to services, click on the "Dollar Value of Service" tab. All cost instances will be listed there as well as Override requests or Amendment requests.

Transportation

Total Subsidized days for all items: 0

Goal* Complete Program Status* Successful Completion

Planned Start Date* Select a goal
Complete Program

Planned Completion Date* 12/7/2022 Completion Date* Pick one
Planned/Not Started (Scheduled)
Started/Open
Successful Completion
Unsuccessful Completion
Evaluated/Not Required

Other Notes

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

This Customer Service was updated by Tyrese Granger on 12/7/2022 at 10:15 AM [Update Customer Service](#)

EDIT CUSTOMER SERVICE

Profile: Amanda Beasley

Email [update_contacts.php](#)

DOB

Last 4 SSN

Individual Number

Recent Date

E&T Provider Employment Connection

Program Enrollment SNAP Job Placement

[See All](#)

[Reset Password](#)

Transportation

Pick the initial service provider OR add a new one.

☐ No Provider

☒ Employment Connection - 225 N. 9th St. East St. Louis IL 62201

☐ St. Clair County/East St. Louis - 225 N 9th Street East St. Louis IL 62201

☐ Search WIOA Provider

☐ Other Provider

Name*

Address*

City*

State* Missouri

ZipCode*

Instructor Select

This Customer Service was updated by Tyrese Granger on 12/7/2022 at 10:15 AM [Update Customer Service](#)



Ensuring Partner Data is Accurate

Data in ISETS should match all other data reported on external forms such as the Periodic Performance Tracking spreadsheet (PPTT) or the Expenditure Documentation Form (EDF). Periodic checks to make sure this data is complete and accurate is done by IDHS staff and findings may be reported to Providers to edit/fix.

Roles

Provider staff are responsible for entering data on a day-to-day basis which populates monthly, quarterly, or year-end reports. Providers are responsible for ensuring the accuracy of this data. It is recommended that Providers review and ensure that data in an external report matches data in ISETS to prevent findings.

Provider Managers are responsible for reviewing their Providers' current data in ISETS monthly in preparation for a Staffing and comparing it to data reported in external forms. Provider Managers also act as the primary point of contact for Providers and therefore are responsible for notifying Providers when they need to take action and providing support.

IDHS Workforce Development (WFD) staff may assist periodically with reviewing past data reported in external forms and comparing that with ISETS and reporting inaccurate data. WFD staff also verifies eligibility for customers.

To perform a data accuracy audit using a PPTT and ISETS:

1. Open the PPTT on your computer and start with the month you would like to review.
2. Open a browser window and log into ISETS.
3. It is recommended to place these two windows side by side on your monitor for easy comparison.
4. In the PPTT view the first customer listed for that month, search in ISETS for that customer and ensure that the case number, start date, activities, referrals and all other columns are reflected accurately in ISETS. If anything does not match, make a note of the finding.
5. All customers should have a referral, be enrolled in a SNAP E&T program, have a SNAP E&T status that indicates they are active in the program, have a SNAP E&T Eligibility status indicating they are still eligible, have a redetermination date that has not past, have an assessment that is less than 12 months old, have at least one SNAP E&T Activity (other than Job Retention) with an "Open/Started" status and a start date. If they have completed Activities and Employment entered for >20 hours/week, they must also be enrolled in the Job Retention Activity.
6. After all customers are reviewed from the PPTT, go to ISETS and view the total list of customers by choosing that Provider from the dropdown menu on the Customer page or by running a 4333 report. You may want to sort columns to make it easier.



- Go down the list and locate anyone listed in ISETS who is NOT listed on the PPTT. View that customer's record and determine if they should be listed in the PPTT. If they are in ISETS but not listed on the Provider's PPTT, note that finding.

ISETS: ALL PARTICIPANTS WHO RECEIVED BENEFITS SUMMARY (4333)

[Back to Reports](#)

Provider *

Asian Human Services

Program *

SNAP Job Placement

Customers

All Participants who received benefits

Staffing Month

September

Fiscal Year

2024

IDHS Office

Select

Filter

Show

10

entries

| F. Name | L. Name | Case Number SNAP Cert Date | Provider Activity | # Hours 2610 | Support Services | Last update to IEP | Last Referral Date Current E&T Status Progress Level Employment Verification | Add 4334 If Required | IDHS Verification | Staffing Completed |
|-----------|-----------|-------------------------------|-------------------|-----------------|------------------|--------------------|---|--|--|--|
| Avi | Apple | 400177177 10/11/2021 | JST, VT | 0 | 0 | 5/11/2021 | 5/17/2021 Active N/A N/A | <input type="radio"/> Not Required <input type="radio"/> Required | <input type="radio"/> SNAP E&T Eligible <input type="radio"/> Not SNAP E&T Eligible | <input type="checkbox"/> Staffing Complete |
| Sherese | Brown | 0 | SJS, JR | 0 | 0 | | 12/19/2022 Active N/A N/A | <input type="radio"/> Not Required <input type="radio"/> Required | <input type="radio"/> SNAP E&T Eligible <input type="radio"/> Not SNAP E&T Eligible | <input type="checkbox"/> Staffing Complete |
| Azella | Collins | 0 10/11/2022 | JR, CW | 0 | 0 | 10/13/2021 | N/A Active N/A N/A | <input type="radio"/> Not Required <input type="radio"/> Required | <input type="radio"/> SNAP E&T Eligible <input type="radio"/> Not SNAP E&T Eligible | <input type="checkbox"/> Staffing Complete |
| Shikita | Curtis | 733733607 5/1/2023 | WRT, JR, E | 0 | 0 | 12/1/2022 | 12/6/2022 Active N/A N/A | <input type="radio"/> Not Required <input type="radio"/> Required | <input type="radio"/> SNAP E&T Eligible <input type="radio"/> Not SNAP E&T Eligible | <input type="checkbox"/> Staffing Complete |
| Angie | Dickenson | 733733606 3/27/2023 | SJS | 0 | 0 | 10/27/2022 | 11/8/2022 Active N/A N/A | <input type="radio"/> Not Required <input type="radio"/> Required | <input type="radio"/> SNAP E&T Eligible <input type="radio"/> Not SNAP E&T Eligible | <input type="checkbox"/> Staffing Complete |
| 10testdog | dogTwo | 791791918 | BE, WRT | 0 | 50 | | 9/5/2023 | <input type="radio"/> Not | <input type="radio"/> SNAP E&T | <input type="checkbox"/> Staffing |

- After compiling your list of findings for the month you are reviewing, email that list to the Provider and cc the Provider Manager for that Provider if you are not the Provider Manager. It is a best practice to give the Provider a due date for making edits/fixes and to allow at least two weeks for them to correct errors.



Providers should be given a written list of findings, if any, and given a reasonable timeframe to correct errors. If they have any questions about a finding or need help fixing data issues, they should contact their Provider Manager for clarification or help. If a Provider sees a data error they cannot fix or something they believe is an error after consulting with their Provider Manager in the ISETS system preventing them from fixing incorrect data, you should submit a Help Request ticket. However, ISETS staff will not be held responsible for changing/fixing data which a Provider's staff have the ability to fix themselves.

Data Integrity Reports

This set of reports is available to ISETS Super Users. Much of this data is available in the dashboard for individual Providers. However, if IDHS desires a more comprehensive list that includes multiple providers, this set of reports is available.

These reports are as follows:

1. Participants marked as Active with completed activities, not Exited
2. Participants marked as Active with no activity in 2 weeks
3. Participants marked as Inactive for more than 30 days
4. Participants with an accepted referral but no enrollment

These reports have no filters but return an all-time list of customers who meet this criteria in the system. These lists are intended for use in remediating common "errors" and ensuring accurate reporting to FNS. These reports can all be exported as well.

ISETS: DATA INTEGRITY REPORT

[Back to Reports](#)

Query Type *

Select

- 1 - Participants marked as Active with completed activities, not Exited
- 2 - Participants marked as Active with no activity for 2 weeks
- 3 - Participants marked as Inactive for more than 30 days
- 4 - Participants with an Accepted Referral, no Enrollment



Approving Supportive Service Cost Overrides

When a Provider enters a supportive service cost that will exceed the maximum allowable payment for that category, ISETS will automatically prompt them to request a cost override. This means that an IDHS Program Manager must approve the overage, verifying that it is reasonable and necessary for the customer to reach their self-sufficiency and employment goals.

1. To find override requests, view the Supportive Service section of your dashboard.
2. Click on the box with the number of requests.
3. Click on the name of the first customer with an override request in the list and navigate to the supportive service section in the Overview.
4. Click on the green “Respond to Service Override” button. The service will open in a new tab.
5. Click on the “Dollar Value of Service” tab. There you will see the override request below the other costs entered.
6. Click on the pencil icon.
7. Review the explanation and the amount.

SERVICES

SUPPORT SERVICES
DATA FOR: FY23

View: Snapshot / Graph / List

Number of unduplicated customers requesting Overrides: 1

1 Users

Number of unduplicated customers with Support Services: 551

551 Users

Support Services

SUPPORT SERVICES
TOTAL PAYMENTS ISSUED - \$385.00

Export List

Transportation - \$110.00 / \$1400.00
7%

Personal Hygiene - \$275.00 / \$250.00
100%

Respond to Service Override

SUPPORTIVE SERVICE DETAILS
Select a supportive service in the graph to view the details below.

Personal Hygiene

Add Service Cost

Maximum Payment Amount: \$250

Current Total: \$275 / 250

Search:

| Payment Method | Service Description | Dollar Amount/Unit | Quantity | Total Cost | Payment Date | Updated By | Date Updated | Edit | Delete |
|----------------|-------------------------------------|--------------------|----------|------------|--------------|-------------------|--------------|------|--------|
| Gift Card | Personal Hygiene - Personal Hygiene | 25.00 | 1 | 25.00 | 1/5/2023 | Moises Bernal | 1/9/2023 | | |
| Direct Payment | Personal Hygiene - Personal Hygiene | 250.00 | 1 | 250.00 | 2/28/2023 | Andrea Grabemeyer | 2/28/2023 | | |

Showing 1 to 2 of 2 entries

Previous 1 Next

Service Override Requests

Search:

| Request Status | Request Amount | Requestor | Date Requested | Updated By | Last Updated | Reviewed By | Edit | Delete |
|----------------|----------------|-------------------|----------------|-------------------|--------------|-------------|------|--------|
| Pending | 25.00 | Andrea Grabemeyer | 2/28/2023 | Andrea Grabemeyer | 2/28/2023 | N/A | | |

Showing 1 to 1 of 1 entries

Previous 1 Next



8. Click on the Status dropdown and select “Accept” or “Reject”.
9. If you choose “Reject” a field will open asking for an explanation. Add your reason for the rejection here.
10. Click the blue “Respond to Request” button.
11. A popup will appear confirming your acceptance or rejection. Click “OK”.

ADD/EDIT SERVICE OVERRIDE REQUEST

Status: Pending

Requested By: Pending

Requested On: 2/28/2023

How much do you wish to request?: 25

Why are you requesting this increase?: This is only a test.

Cancel Respond to Request

apps.illinoisworknet.com says

Service override request has been Rejected.

OK



Exiting Customers from E&T in ISETS

A customer may exit SNAP E&T for several reasons:

- a customer voluntarily exits the SNAP E&T program either before completing activities or after completing activities.
- a customer becomes ineligible because either their SNAP benefits have ended or they have started to receive TANF benefits.
- a customer has become employed and completed their 365-day retention maximum.

When a customer is exiting SNAP E&T there are several actions Providers must take to ensure that they are Exited in ISETS.

1. In the customer record, the Provider must locate the customer's activities and edit those activities to reflect the appropriate completed status and the date they have completed those activities (or the exit date if they never technically completed them). Please see the "Adding and Managing Activities" section in this manual on how to edit these.
2. After all activities have been closed with an actual end date, the Provider may go to the Completed/Exited section in the Overview tab on the customer record. You can also find this section in the Outcomes tab at the top of the customer record.
3. The Provider clicks on the Program dropdown and selects their program.
4. Then they click on the dropdown menu and choose the appropriate Program Completion status.

Completed / Exited

This is an automatically updated checklist based on your provider.
Once all provider activities have been completed, you can exit the customer.

- ☒ All SNAP E&T Activities (not including Supportive Services) have a completion status (successful/unsuccessful) or have been removed.
- ☐ At least 1 Measurable Skill Gain has been entered.¹
- ☐ All Industry Recognized Credentials are entered into the system.^(1, 2)

¹ These are not required to Exit the Customer but are helpful to gauge success of the program.
² Credentials must be the Industry Recognized Credential to count for Performance.
Make sure you have all your supporting documentation in the file.

Program: SNAP Job Placement - Asian Hl

Program completion status: Select

Program Completion Date: Select

Save

Show 5 entries

Search:

| ISETS Program | Provider Name | Exit Status | Exit Reason | Date Exited | Exited By |
|----------------------------|---------------|-------------|-------------|-------------|-----------|
| No data available in table | | | | | |

Showing 0 to 0 of 0 entries

Previous Next

Note: activities which were never started must be deleted prior to exiting the customer.



- a. **Unsuccessful Completion:** customer did not complete the program and had no positive outcomes (skills gained, credentials, or employment)
 - b. **Moved to another program:** customer moved to TANF E&T, WIOA, or to another state.
 - c. **Successful Completion:** the customer successfully completed training or program requirements and is ready to end their participation.
 - d. **Successfully Employed:** the customer was successfully employed for over 90 days with a job over 20 hours/week.
4. Another drop down will appear with more details. Select the most appropriate “Outcomes/Reason”
 5. The Provider enters the Program Completion date.
 6. The Provider clicks the “Save” button.

Make sure you have all your supporting documentation in the file.

Program: SNAP Job Placement - Asian Hl

Program completion status: Exited - Successful Completion

Outcome / Reason: Select

Program Completion Date: Select

Save

Show 5 entries

| ISETS Program | Provider Name | Exit Status | Exit Reason | Date Exited | Exited By |
|----------------------------|---------------|-------------|-------------|-------------|-----------|
| No data available in table | | | | | |

Showing 0 to 0 of 0 entries

Previous Next

You will be prompted to add case notes describing the circumstances of the customer’s exit. It is a good idea to note in this case note whether they are eligible to return to your agency later or not.

Once exited, a customer’s referral status and SNAP E&T status will be changed to “Exited”. Activities and Services will be saved and locked. Post-exit employment or follow up case notes can be added for up to 60 days but no further edits on activities or services are allowed.

Best Practice

If a customer is exited and re-enrolls in SNAP E&T later, Providers must conduct a new assessment, referral, and enrollment. Activities and Services will need to be added for the new SNAP E&T session.

Providers should NEVER edit Activities for a previous enrollment period after a customer is exited.



Reporting

Reporting is an important part of fulfilling your role at IDHS and is done through generating and reviewing generated reports which pull data from ISETS. IDHS staff review the reports Providers submit monthly at least. IDHS staff may also generate and review reports at any time during the month to ensure data is accurate or may generate quarterly, half-year, or year end reports as well.

Reports are an indication of the services Providers are providing to customers, an agency's performance toward goals, and they contribute to IDHS making data-driven policy and contract decisions. Future contract awards and appropriations may be determined by reviewing these reports.

Roles

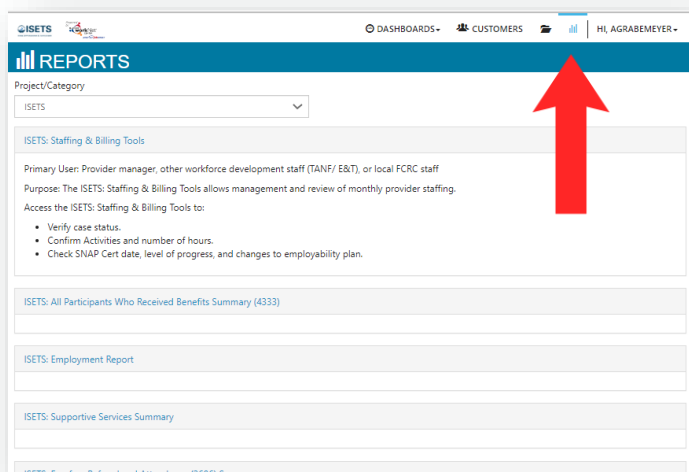
Provider staff are responsible for entering data on a day-to-day basis which populates monthly, quarterly, or year-end reports. Providers are responsible for ensuring the accuracy of this data.

Provider Managers are responsible for reviewing their Providers' data including customer records and progress toward overall contract goals. They are responsible for scheduling and holding a monthly staffing meeting with each Provider to review the contents of reports. Provider Managers are also responsible for answering any questions, clarifying policies, and discussing any unusual situations with Providers to reach resolution.

IDHS Workforce Development (WFD) staff are responsible for representing IDHS and verifying customers are eligible. WFD staff are also responsible for reviewing referrals from FCRCs and distributing those to appropriate Providers through ISETS. WFD staff may also play a role in verifying Provider data is complete and accurate and reporting inaccuracies to Provider Managers to address with Providers.

1. Select the "Reports" icon on the top menu bar.

All available reports are listed individually depending on your role and access. Some reports described here may not be available to you individually, but you should know that they exist.





Administrative Reports

Case Note Deletion Request Report

IDHS Managers are responsible for reviewing and processing requests for case notes to be deleted from ISETS. Providers are not able to delete their own case notes. This is to prevent data from being deleted which may be valuable in an audit. Only Super Users have access to this report and only IDHS Management staff have the authority to approve or deny cast note deletion requests.

The screenshot shows the 'CASE NOTE DELETION REQUEST REPORT' interface. On the left, there are filters for Project (ISETS), Agency (Select), and Status (Select). The Status dropdown is open, showing options: Select, Approved, Not Reviewed, and Rejected. A red arrow points to the 'Related Instructions' section on the right side of the report header.

To review requests, navigate to this report and

1. select the “Not Reviewed” status. A list of notes will be available to review.
2. Click on the blue “Manage” text in the far right column.
3. The note will appear in a pop-up box and the name of the requestor, the date, and the deletion reason will all be listed for your review. For requests that indicate the note is a duplicate, the best practice is to navigate to the case notes for that customer and verify that there are 2 identical notes.
4. Change the status to “Approved” or “Rejected” and hit the “Save” button.

Super Admin Report

IDHS Super Users have access to a suite of reports that allow larger reports to be run including multiple Providers, multiple Programs, and flexible timeframes. These reports are intended for IDHS Administrative reporting use.

The screenshot shows the 'ISETS: SUPER ADMIN REPORT' interface. It includes filters for Providers, Start Date (07/01/2024), End Date (06/30/2025), Fiscal Year (2025), and Report Type (Select). The Report Type dropdown is open, showing a list of report types including 4333/Benefit Summary, Supportive Services Summary, Employment Summary, Earmfare Referral/Attendance Summary, FNS SNAP 583 Monthly Federal Report, FNS SNAP 583 Annual Federal Report, FNS Outcomes Participation Federal Report, FNS Outcomes Completed Federal Report, Job Retention Support Services Expenditures Report, and FNS Exited Participants Report.



Data Integrity Report

This report was discussed in the [Ensuring Partner Data is Accurate](#) section. Please refer to that section for more about this report.

Amended Report History List

This report shows IDHS Administrative staff a history of all amendments requested and approved for Providers. The purpose is to be able to review statistics on how frequently Providers are submitting amendments to inform training and program improvement decision making.

Monthly Performance Reporting

Staffing & Billing Tools

1. Select the blue “ISETS Staffing & Billing Tools” link and a page will open with filters at the top.
2. Select the Provider, Program, and the Month for which you need to complete your Staffing. Note: Staffing reports from Providers are due on the 15th of the month following the close of a month. For example, July’s Staffing report is due August 15th. Provider Managers’ portion is due by the 20th of the month.
3. To display all Staffing reports for all months, leave the “Staffing Month” dropdown blank (Select).
4. Click the “Filter” button
5. You will see a list of your Staffing/Billing Packets, when they were submitted and when they were approved.
6. To view the details of a specific Staffing report, click the blue linked date on the left-hand side of the list. To edit or submit a report that has not yet been submitted, you must also click the blue linked date in the Staffing/Billing Packet column.

Staffing & Billing Costs Color Differences

Red font – override approved

Gold Triangle – pending override

Red Triangle – change to staffing

| Provider | Staffing/Billing Packet | Staffing Status | Billing Submittal Status | Billing Approval Status |
|--|---------------------------|----------------------|--------------------------|-------------------------|
| Asian Human Services of Chicago - Snap Job Placement | 7/1/2024 | Submitted 3/28/2025 | Submitted 3/28/2025 | Approved 3/28/2025 |
| Asian Human Services of Chicago - Snap Job Placement | 8/1/2024 | Submitted 12/19/2024 | Submitted 12/19/2024 | Approved 1/21/2025 |
| Asian Human Services of Chicago - Snap Job Placement | 9/1/2024 | Submitted 12/19/2024 | Submitted 7/15/2025 | Approved 7/15/2025 |
| Asian Human Services of Chicago - Snap Job Placement | 10/1/2024 | Submitted 10/16/2025 | Submitted 6/9/2025 | Approved 6/9/2025 |
| Asian Human Services of Chicago - Snap Job Placement | 11/1/2024 | Submitted 5/6/2025 | Not Submitted | Not Approved |



ISSETS: STAFFING & BILLING TOOLS

Back to Reports

Provider *
Asian Human Services of Chicago

Staffing Month
Select

Include FCRCs ☐

Fiscal Year
2025

Program *
SNAP Job Placement

IDHS Office
Select

Download Performance Improvement Plan Form (Word)

Back to List

GRANT EXPENDITURE YEAR TO DATE

| | YTD % | Jul-8.33% | Aug- | Sep- | Oct-8.33% | Nov- | Dec- | Jan-8.33% | Feb-8.33% | Mar- | Apr-8.33% | May- | Jun-8.33% |
|---------------------|---------|-----------|------|------|-----------|------|------|-----------|-----------|------|-----------|------|-----------|
| Administration | 100.00% | | | | | | | | | | | | |
| Supportive Services | 20.46% | | | | | | | | | | | | |

Approved Budget
\$50,000.00

\$10,000.00

1. Complete Staffing Packet

Provider will check when sections have been reviewed and are ready to be submitted

- ☐ Employment Report
- ☐ Supportive Services Summary
- ☐ All Participants Who Received Benefits Summary (4333)

Upload Supporting Documents
Required submission by the 15th of the month following service.

Submit Staffing Report

2. Approve Staffing Packet

Provider Manager will check when sections have been reviewed and are ready to be submitted

- ☐ Employment Report
- ☐ Supportive Services Summary
- ☐ Benefits Summary (4333)

View Supporting Documents
Required submission by the 20th of the month following service.

Approve Staffing Report

3. Approve Billing Packet

Billing staff will check when sections have been reviewed and are ready to be approved

- ☐ Consolidated Supportive Services Summary
- ☐ Consolidated Benefits Summary (4333)
- ☐ Total Monthly Charges

View Supporting Documents
Approval required by the last day of the month following submission.

Reviewed and Approved

Provider Tasks

Provider Manager/ WFD Tasks

Billing Manager Tasks

7. The first section titled “Complete Staffing Packet” is where Providers should begin.
8. Providers should have generated, reviewed, and checked each of these boxes in preparation for your staffing. To review each of these reports, click on the blue linked text.
9. Click on the first blue linked report: “Employment Report”. Verify that this report is correct including all employment verifications (they should all say “Yes – Document Uploaded”). If there are any employment placements that say “No” under the verification column, click into that customer and view the employment. If there is a document, review it and verify it. If there is no employment verification address this with your Provider.
10. Then click on the next blue linked report: “Supportive Services Summary”. Verify that all data in this report is correct and complete and no further changes are needed for billing.
11. 4333: Review this list and ensure that all active customers are included. If a customer is missing, note that to discuss with the Provider during the staffing. To be included in the 4333 a customer must:
 - Have an accepted referral
 - Are currently enrolled in a program. (This can be found on the left side of a customer record “Program Enrollment”)
 - Has an E&T Status of “Active” or “Retention”
 - Have an open SNAP Activity with dates that indicate that activity is active within the month of the report run
 - The SNAP Activity has your program listed as the Provider in the “Provider” tab.



12. Ensure all customer activities are appropriate and no customers need data corrections.
13. For each customer, the Provider should have made sure that their Progress Level is correct and clicked the radio button indicating if a Full Staffing/4334 is required. Clicking this radio button means that they Provider needs to have a discussion with a Provider Manager (potentially including the customer) to discuss their progress and participation in the program.
14. WFD staff should verify eligibility for SNAP E&T and click the appropriate radio button for "IDHS Verification"
15. Provider Managers should check the "Staffing Complete" box when the staffing has been completed.
16. When the staffing is completed, Provider Managers should ensure all boxes are checked in the list then click the "Staffing Complete" button at the bottom of the page.
17. Return to the "Staffing & Billing Tools".
18. Review any monthly financial reports and ensure that these numbers match what the Provider has submitted in the Expenditure Documentation Form (EDF).
19. Make sure all boxes are checked next to each report in the second box labeled "2. Submit Billing Packet" then click the blue "Approve Staffing Report" button.
20. This completes the WFD/Provider Manager portion of the Staffing.
21. IDHS billing staff will review the reports and approve them. Billing staff submit for payment through another process.

| Add 4334 If Required | IDHS Verification | Staffing Completed |
|---------------------------------------|--|---|
| <input type="radio"/> Not Required | <input type="radio"/> SNAP E&T Eligible | <input type="checkbox"/> Staffing Complete |
| <input type="radio"/> Required | <input type="radio"/> Not SNAP E&T Eligible | |

| | | |
|---|---|--|
| <input checked="" type="radio"/> Not Required | <input type="radio"/> SNAP E&T Eligible | <input checked="" type="checkbox"/> Staffing Complete |
| <input type="radio"/> Required 2/10/2023 - ojjohnso | <input checked="" type="radio"/> Not SNAP E&T Eligible 2/10/2023 - karen.blanton | 2/10/2023 - karen.blanton |

Previous 1 2 Next

Staffing Complete

2. Approve Staffing Packet

Provider Manager will check when sections have been reviewed and are ready to be submitted

- ☐ Employment Report
- ☐ Supportive Services Summary
- ☐ Benefits Summary (4333)

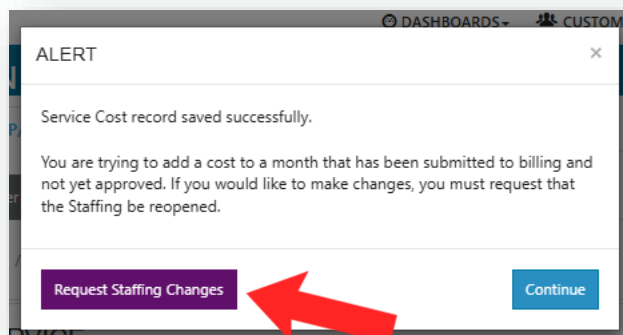
Required submission by the 20th of the month following service.

Approve Staffing Report

Note: Customers enrolled in some activities for 6, 9, or 12 months consecutively may have a 4333 required. In these cases, the "Not Required" radio button will be greyed out and they MUST be discussed during the staffing.



Note: Once the Staffing is held and the Provider Manager clicks their button to “Approve Staffing Report”, this button will lock all data for the month. Any subsequent changes by a Provider will require the Provider Manager to unlock the staffing report and re-approve it before billing can approve the Billing packet.



Reopening a Staffing

Prior to a Billing Manager approving the Staffing & Billing report, a Provider may request to reopen the monthly reporting module. If they add costs or make changes in the time period after the Staffing is completed and approved by the Provider Manager but before the Billing Manager has approved and locked the report, the Provider will see a pop up like the one above. The Provider can also go to the staffing in question and click the purple button to request that the Provider Manager reopen the Staffing to make changes. The Provider Manager can click on the purple button “Un-Approve Staffing Report” to back out their approval and reopen the staffing.

| 1. Complete Staffing Packet | 2. Approve Staffing Packet | 3. Approve Billing Packet |
|--|---|---|
| <p>Provider will check when sections have been reviewed and are ready to be submitted</p> <ul style="list-style-type: none"><input checked="" type="checkbox"/> Earnfare Referral and Attendance (2606) Summary<input checked="" type="checkbox"/> Supportive Services Summary<input checked="" type="checkbox"/> All Participants Who Received Benefits Summary (4333) <p>Upload Supporting Documents</p> <p>Required submission by the 15th of the month following service.</p> <p>Submit Staffing Report</p> <p>Request Staffing Changes</p> <p>Submitted: 11/22/2024 - By: Amelia Telger Partner Reviewed 4333: 11/22/2024 - By: Amelia Telger Partner Reviewed SSS: 2/22/2025 - By: Amelia Telger</p> | <p>Provider Manager will check when sections have been reviewed and are ready to be submitted</p> <ul style="list-style-type: none"><input checked="" type="checkbox"/> Earnfare Referral and Attendance (2606) Summary<input checked="" type="checkbox"/> Supportive Services Summary<input checked="" type="checkbox"/> Benefits Summary (4333) <p>View Supporting Documents</p> <p>Required submission by the 20th of the month following service.</p> <p>Approve Staffing Report</p> <p>Un-Approve Staffing Report</p> <p>Submitted: 11/22/2024 - By: Amelia Telger Staffing Complete: 11/22/2024 - By: Amelia Telger</p> | <p>Billing staff will check when sections have been reviewed and are ready to be approved</p> <ul style="list-style-type: none"><input type="checkbox"/> Earnfare Referral and Attendance (2606) Summary<input type="checkbox"/> Consolidated Supportive Services Summary<input type="checkbox"/> Consolidated Benefits Summary (4333)<input type="checkbox"/> Total Monthly Charges <p>View Supporting Documents</p> <p>Approval required by the last day of the month following submission.</p> <p>Reviewed and Approved</p> |



The Provider Manager may need to hold another meeting with the Provider to review and approve changes before approving the staffing again. Then Billing can review and approve their part.

After the Billing Manager has accepted the Staffing & Billing report for the month, the Staffing & Billing is locked; no further changes are allowed, even with Provider Manager approval. In that case, an official billing amendment is required. That process outlined below.

Billing

The third part of the Staffing & Billing Tools module is the box labeled “3. Approve Billing Packet”. This box is only for IDHS SNAP E&T Billing staff.

| 1. Complete Staffing Packet | 2. Submit Billing Packet | 3. Approve Billing Packet |
|--|---|---|
| <p>Provider will check when sections have been reviewed and are ready to be submitted</p> <ul style="list-style-type: none"><input checked="" type="checkbox"/> All Participants Who Received Benefits Summary (4333)<input checked="" type="checkbox"/> Supportive Services Summary<input checked="" type="checkbox"/> Employment Report <p>Required submission by the 10th of the month following service.</p> <p>Submit Staffing Report</p> <p>Submitted: Tami Yarbrough 2/9/2023</p> | <p>Provider Manager will check when sections have been reviewed and are ready to be submitted</p> <ul style="list-style-type: none"><input checked="" type="checkbox"/> All Participants Who Received Benefits Summary (4333)<input checked="" type="checkbox"/> Supportive Services Summary <p>Required submission by the 10th of the month following service.</p> <p>Submit Billing Report</p> <p>Submitted: Tami Yarbrough 2/9/2023</p> | <p>Billing staff will check when sections have been reviewed and are ready to be approved</p> <ul style="list-style-type: none"><input type="checkbox"/> All Participants Who Received Benefits Summary (4333)<input type="checkbox"/> Supportive Services Summary <p>Approval required by the last day of the month following submission.</p> <p>Request Changes or More Information</p> <p>Reviewed and Approved</p> |

This section is where billing staff can review, download reports, and request changes or more information from Providers prior to approving the Billing Packet and submitting for vouchering.

Each report listed should be reviewed for billing accuracy and the box checked by a billing staff member if accepted. If not accepted, click the blue “Request Changes or More Information” button. This button should be used if the billing staff person requires an uploaded receipt or other documentation or if the expense is otherwise not authorized.

Once the “Reviewed and Approved” button is clicked by a billing staff person, it is assumed that the documentation for that month is complete and authorized for vouchering. The billing staff person can download any data required and/or submit for vouchering through the appropriate financial system (not ISETS).



If a Provider adds a Supportive Service cost that applies to a past month for which the reporting is already closed, they will see a pop-up alert like this:

The screenshot shows a web application interface. At the top, there's a navigation bar with 'DASHBOARDS' and 'CUSTOM'. Below it, a large 'ALERT' dialog box is displayed. The alert text reads: 'Service Cost record saved successfully. This has affected a submitted billing packet and will be submitted for amendment review for the next open Staffing.' Below the text, there's a 'Notes' section with a text input field labeled 'Enter a reason for the Amended Cost'. A red arrow points to this input field. At the bottom right of the alert box is a 'Continue' button. In the foreground, overlapping the bottom of the alert box, is a smaller white confirmation message box. It says 'testapps.illinoisworknet.com says' in bold, followed by 'Service cost note updated successfully.' and an 'OK' button.

Once the amended cost reason is entered and submitted the Provider will see a confirmation message like the one above.

Staffing & Billing Tools

1. Select the blue "ISETS Staffing & Billing Tools" link and a page will open with filters at the top.
2. Select the Provider, Program, and the Month for which you need to complete your Staffing. Note: Staffing reports from Providers are due on the 15th of the month following the close of a month. For example, July's Staffing report is due August 15th. Provider Managers' portion is due by the 20th of the month.
3. To display all Staffing reports for all months, leave the "Staffing Month" dropdown blank (Select).
4. Click the "Filter" button
5. You will see a list of your Staffing/Billing Packets, when they were submitted and when they were approved.
6. To view the details of a specific Staffing report, click the blue linked date on the left-hand side of the list. To edit or submit a report that has not yet been submitted, you must also click the blue linked date in the Staffing/Billing Packet column.



When reviewing and approving the next Staffing & Billing report, all data for the month (in this example November) will be reviewed and submitted as usual. You'll notice that there is appears a report to review called "Post-Staffing Amendment Change List". This report only appears if amendments have been made. The Provider Manager should click on this report to review it.

ISETS

DASHBOARDS CUSTOMERS HI, ATESTING

ISETS: STAFFING & BILLING TOOLS

[Back to Reports](#)

Provider *
Asian Human Services of Chicago

Staffing Month
November

Include FCRCs ☐

Fiscal Year
2025

Program *
SNAP Job Placement

IDHS Office
Select

[Download Performance Improvement Plan Form \(Word\)](#)

[Back to List](#)

GRANT EXPENDITURE YEAR TO DATE

| | YTD % | Jul-8.33% | Aug- | Sep- | Oct-8.33% | Nov- | Dec- | Jan-8.33% | Feb-8.33% | Mar- | Apr-8.33% | May- | Jun-8.33% | Approved Budget |
|---------------------|---------|-----------|------|------|-----------|------|------|-----------|-----------|------|-----------|------|-----------|-----------------|
| Administration | 100.00% | | | | | | | | | | | | | \$50,000.00 |
| Supportive Services | 20.46% | | | | | | | | | | | | | \$10,000.00 |

1. Complete Staffing Packet

Provider will check when sections have been reviewed and are ready to be submitted

- ☒ Employment Report
- ☒ Supportive Services Summary
- ☒ All Participants Who Received Benefits Summary (4333)

[Upload Supporting Documents](#)

Required submission by the 15th of the month following service.

[Submit Staffing Report](#)

Submitted: 5/6/2025 - By: Amelia Telger
Partner Reviewed 4333: 12/4/2024 - By: Markee Waldron
Partner Reviewed SSS: 12/4/2024 - By: Markee Waldron

2. Approve Staffing Packet

Provider Manager will check when sections have been reviewed and are ready to be submitted

- ☒ Employment Report
- ☒ Supportive Services Summary
- ☒ Benefits Summary (4333)
- ☐ Post-Staffing Amendment Change List

[View Supporting Documents](#)

Required submission by the 20th of the month following service.

[Approve Staffing Report](#)

Staffing Complete: 6/10/2025 - By: ISETS Smanager

3. Approve Billing Packet

Billing staff will check when sections have been reviewed and are ready to be approved

- ☐ Consolidated Supportive Services Summary
- ☐ Consolidated Benefits Summary (4333)
- ☐ Total Monthly Charges

[View Supporting Documents](#)

Approval required by the last day of the month following submission.

[Reviewed and Approved](#)



This report contains all amendments that have been entered since the last Staffing & Billing was completed. All blue text is a link to that Customer/Service/cost for your reference. Click the purple “Changes Reviewed” button to certify that all changes have been reviewed by IDHS staff. You will also be prompted to enter a case note (a boilerplate draft will be provided for you).

ISSETS: POST STAFFING SERVICE AMENDMENT LIST

Back to Reports

25 entries per page

| Name | Changed Activities/Services | Adjusted Summary Month(s) | Original Hours | New Hours | Original Support Total | New Support Total | IDHS Verification | Action |
|---------------------------------|--------------------------------|---------------------------|----------------|-----------|------------------------|-------------------|---|--------|
| Synthia Reed111 | Transportation | Jul | 0 | 0 | \$0.00 | \$25.00 | <input checked="" type="radio"/> SNAP E&T Eligible <input type="radio"/> Not SNAP E&T Eligible | |
| Synthia Reed75 | Transportation | Oct | 0 | 0 | \$0.00 | \$50.00 | <input checked="" type="radio"/> SNAP E&T Eligible <input type="radio"/> Not SNAP E&T Eligible | |

Showing 1 to 2 of 2 entries

Print Excel Download

Changes Reviewed

ADD CASE NOTE

Performance Improvement

Contact Date: 7/29/2025

Asian Human Services of Chicago Changes Reviewed

All post-staffing changes were approved for Asian Human Services of Chicago on the November 2025 Staffing & Billing.

Send Case Note As:
☐ As Illinois workNet Message
☐ As Illinois workNet Message and Email
☐ Save as case note without sending a message/email

Send Message/Email to:

Add Case Note



During the Billing Manager review, the Billing Manager will review all current month data as usual. Then when viewing the “Total Monthly Charges” report, if amended costs have been added, they will see blue linked text, “Retrieve Amendment Changes”, in the Amended Expenses column. To review and include those expenses in this month’s billing, click the link.

ISETS: SNAP MONTHLY TOTAL EXPENSE REPORT

Back to Reports

Provider *
Asian Human Services of Chicago

Staffing Month *
November

Program *
SNAP Job Placement

Fiscal Year *
2025

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Filter

10 entries per page

| Approved By Billing | Current Month's Expenses | Amended Expenses | Total Expenses Billed |
|--------------------------|--------------------------|--|-----------------------|
| <input type="checkbox"/> | \$77.00 | Retrieve Amendment Changes | \$77.00 |

Showing 1 to 1 of 1 entry

A pop-up notice will appear. If you only want to review these and NOT include them in the billing, click “Cancel”. If you want to pull those costs into the current monthly bill, click “OK”. Another pop-up will appear with a notice that the changes were approved by the PM during their review. Click “OK” to close the modal and simply view the total amended charges. Click “Cancel” to review all amended charges line by line. You can see the name of the customer, the month the cost was given, and the total cost. Remember that blue text are links for your reference. Click “Close” to close the pop-up.

testapps.illinoisworknet.com says

Retrieving amendment changes will add all amended costs to the November 2025 staffing for Asian Human Services of Chicago.

Do you wish to continue?

OK Cancel

testapps.illinoisworknet.com says

Changes approved on 7/29/2025 10:29 AM by user ATesting

Press 'OK' to close the modal.
Press 'Cancel' to view changes that were applied.

OK Cancel



You should now see the total of all Amended Expenses in that column. If approved, check the “Approved by Billing” box and complete the staffing as usual.

ISETS: SNAP MONTHLY TOTAL EXPENSE REPORT

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Provider *
Asian Human Services of Chicago

Staffing Month *
November

Program *
SNAP Job Placement

Fiscal Year *
2025

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Filter

10 entries per page

| Approved By Billing | Current Month's Expenses | Amended Expenses | Total Expenses Billed |
|--------------------------|--------------------------|------------------|-----------------------|
| <input type="checkbox"/> | \$77.00 | \$75 | \$152 |

Showing 1 to 1 of 1 entry

Expenses Documentation Form (EDF)

The EDF is a spreadsheet document usually completed by Provider financial staff and submitted by the 15th of the month as a part of the Staffing & Billing process. These are typically uploaded in the ISETS Staffing & Billing module and/or sent to the Provider Manager to review as a part of the Staffing. Expenses listed in the EDF for billing should match the results of ISETS reports. If this document does not match what is in ISETS, like the PPTT, that discrepancy must be resolved during the Staffing & Billing process before Billing will be approved.

Best Practice

Ensure that amendments and costs are reconciled every month rather than waiting several months. This ensures that end-of-year billing and reconciliations are easier.



PPTT

At the time of last review, the PPTT (Periodic Performance Tracking spreadsheet) is not required in addition to the Staffing report in ISETS. In FY26 this separate spreadsheet may have already been discontinued for some Providers. However, if your Provider is still using the PPTT, both are due on the 15th of the month following the close of a month. Please ensure that the data in a Provider's PPTT matches what is in all of the ISETS reports. Provider Managers should review both and note findings or discrepancies during the monthly staffing.

More about comparing the PPTT to ISETS data is outlined in the ["Ensuring Partner Data is Accurate"](#) section.

Best Practice

Provider Managers should also review the Provider's overall progress toward contract goals. This can be done through reviewing the contract in the Provider Info tab or reviewing the dashboard.

Monthly Performance Reporting Cont.

Reports included in the Staffing & Billing module can also be run ad hoc. They are as follows:

Overall Staffing Report

Similar to the Reports section in the dashboard, this report shows Provider monthly reports and their statuses, submission/approval dates. An user with access to this report can select multiple Providers, multiple programs, months (or select no month to show all months). This allows users to see all monthly reports in one ledger to manage timely submission and approval of these reports.

All Participants Who Received Benefits Summary (4333)

This report allows users to create and review monthly 4333 reports. It includes all customers who have received services within the month. In order to be included on the 4333 a customer must meet certain criteria. That criteria is outlined in the [Staffing & Billing](#) section.\

Supportive Services Summary

This report shows customers who have received supportive services and the amounts and categories of those services. Any amount in red indicates an override request within that month.

Earnfare Referral and Attendance Summary (2606)

This report is for Earnfare Providers only and includes each customer served, the hours they are required to work, the actual hours they worked during the month and their progress toward the maximum Earnfare time.



Employment Report

This report shows which customers have gained employment while participating in SNAP E&T for a specific Provider. Each of these employed customers should be enrolled in Job Retention if the placement is over 20 hours/week. Each customer in retention should receive at least monthly contact for the first 90 days in retention. They may receive case management and supportive services and participate in the Job Retention Activity for up to 365 days. Additional employment verification is required within 30 days of a supportive service if a customer is beyond the first 90 day retention benchmark.

Best Practice

Intermediary Partners are responsible for reviewing all reports for all subcontractors underneath them prior to submitting consolidated reports to IDHS for review and approval.

Intermediary Reports

Consolidated reports are intended for Intermediaries who have subcontractors underneath them. This report

Consolidated Benefits Summary (4333)

This report shows a report of all subcontractor Providers and their total activity service numbers for a given month.

Consolidated Supportive Services Summary

This report shows a report of all subcontractor Providers and their total supportive service numbers for a given month.

Consolidated Snap To Success Financial Report

This report allows an Intermediary to create, submit and edit monthly financial reports.

Financial Repots

SNAP 2 Success Financial Report

This financial report is only for SNAP 2 Success Providers and is due each month as a part of the Staffing and Billing. For S2S providers, this will show automatically in Section 1 of the Staffing & Billing module.

SNAP Job Placement Financial Report

This financial report is only for SNAP 2 Success Providers and is due each month as a part of the Staffing and Billing. For S2S providers, this will show automatically in Section 1 of the Staffing & Billing module.



Quarterly Interest Report

This report will appear quarterly in the Staffing reports required. It is a reporting of any interest accrued by funds paid to you by IDHS. This report will automatically show in Section 1 of the Staffing & Billing module when due.

SNAP Monthly Total Expense Report

This report shows monthly total expenses for a specific Provider for a specific month.

Ledger Report

This report shows all monthly expenses by category. Users may use this report to review financial reports submitted and approved over multiple months and compare spending against contract budgets.

Other Performance Reports

SNAP Activity Attendance Report

This report gives a comprehensive report of all customers who have been served within a date range and the activities and total attendance hours. This report includes ABAWD status.

Provider Employment Report

This report allows an administrative level report to show employment outcomes by Provider for a program year.

FNS Report

This set of reports is used by IDHS Administrative staff to generate data to report State SNAP E&T performance to FNS.

Year End Reports

This report is only available to Super Users. IDHS Administrative staff may generate, review, and download reports across multiple providers, across multiple programs, for a specific time period. The purpose of these reports is to glean insights intended to contribute to program improvements and policy changes

Periodic Performance Report

This report is due quarterly and will also automatically appear in the Staffing reports required. This report has nothing for the Provider to fill out but is based on data entered in ISETS. Quarterly totals are unduplicated counts as is the annual total. For example a customer served in all 4 quarters would show up as 1 count in each quarter and 1 count in the Yearly Total. (see image on next page)



DASHBOARDS
CUSTOMERS
HI, ATESTING

ISSETS: PERIODIC PERFORMANCE REPORT

[Back to Reports](#)

Provider
Asian Human Services of Chicago

Fiscal Year
2025

Program
SNAP Job Placement

[Click Here for the Fillable PPR Form](#)
[Click Here to Upload the Completed PPR Form](#)

Search

| Name | Q1 | Q2 | Q3 | Q4 | Total |
|---|-----|-----|------|-----|-------|
| Number of Referrals Received | 0 | 2 | 6 | 3 | 11 |
| Number of Referrals Accepted | 0 | 1 | 5 | 2 | 8 |
| Number of Reverse Referrals Sent | 0 | 2 | 21 | 5 | 26 |
| Number of Customers Referred to other Providers | 0 | 0 | 0 | 0 | 0 |
| Number of Customers Assessed/EP | 1 | 1 | 0 | 0 | 1 |
| Number of Customers Engaged in SNAP E&T | 3 | 3 | 5 | 7 | 7 |
| Number of Customers Referred to Mental Health/Substance Abuse/Counseling and/or Vocational Rehabilitation | 0 | 0 | 0 | 0 | 0 |
| Number of Customers Enrolled in Training | 1 | 0 | 1 | 2 | 4 |
| Number of Customers Completing Training or Earning Certificates | 9 | 1 | 4 | 3 | 14 |
| Number of Earned Credentials | 0 | 0 | 0 | 0 | 0 |
| Number of Skills Gained | 0 | 0 | 0 | 0 | 0 |
| Number of Customers Enrolled in Supervised Job Search, Job Readiness, or Work Experience | 2 | 0 | 2 | 2 | 6 |
| Number of Customers Enrolled in ABE, GED, or ESL Classes | 0 | 0 | 1 | 0 | 1 |
| Number of Customers Hired | 3 | 0 | 0 | 0 | 3 |
| Number of Hires in Growth Sectors | 3 | 0 | 0 | 0 | 3 |
| Number of Customers in Retention Services | 3 | 0 | 1 | 0 | 4 |
| Number of Customers that met 30 day benchmark | 1 | 0 | 0 | 0 | 1 |
| Number of Customers that met 60 day benchmark | 0 | 0 | 0 | 0 | 0 |
| Number of Customers that met 90 day benchmark | 0 | 0 | 0 | 0 | 0 |
| Number of Successful Completions | 0 | 0 | 0 | 0 | 0 |
| Total Expenditure Amount | 492 | 454 | 1125 | 125 | 2196 |

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Customer Service Report

The Customer Services Report provides a list of services provided to customers by project or Customer Support Center group. The list identifies the IWDS service if applicable, the status of the service, and the customer who have/do not have the listed service.

Credentials Report

This report provides a list of all credentials earned in total by industry, Provider, type and timeframe.

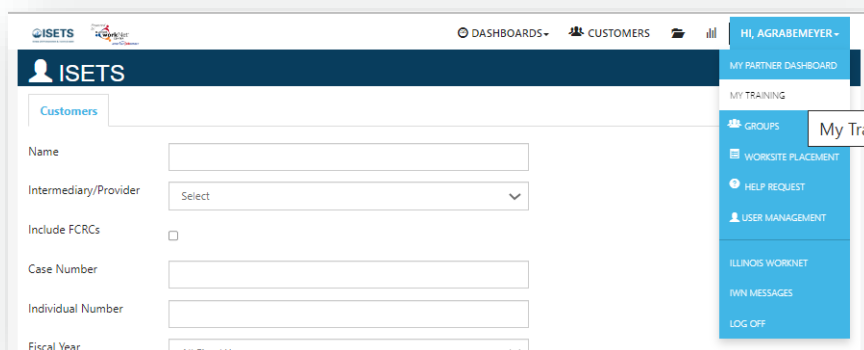


Where to Get Help

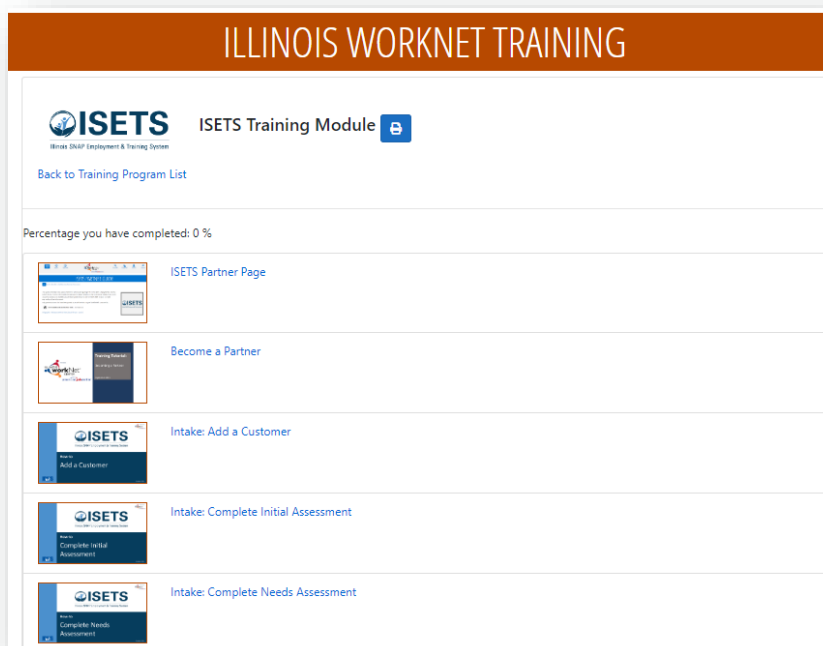
In ISETS there are several places to get help learning the new system or to get help with system issues. We have [live virtual trainings](#) hosted by the Chicago Jobs Council for Providers which are recorded and live virtual Technical Assistance calls every week. Resources, training recordings, and TA Calls can be found by accessing the ISETS Partner webpage: [Workforce and Education Partners isets Partner Guide \(illinoisworknet.com\)](#)

Accessing Training in ISETS

1. In the Username menu, click on the dropdown and choose “My Training” from the menu.



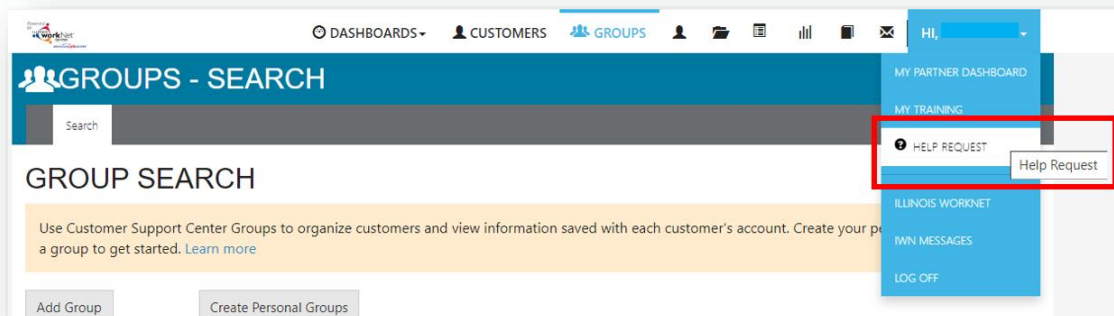
2. A new browser window will load called “Illinois Worknet Training”.
3. Click on the blue “Start the ISETS Training Module” link. Each module is listed there with a video walkthrough by subject matter.





Submitting a new Help Request

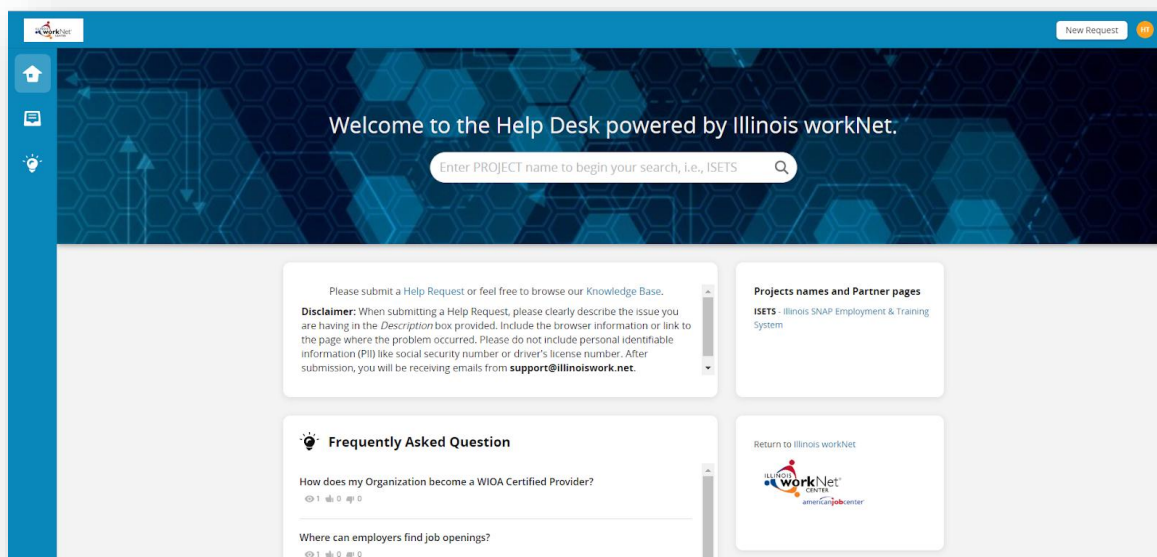
1. Click “Help Request” in the dropdown menu when in the Username Menu in ISETS.



2. A new browser window will load called “Help Desk powered by Illinois workNet”.

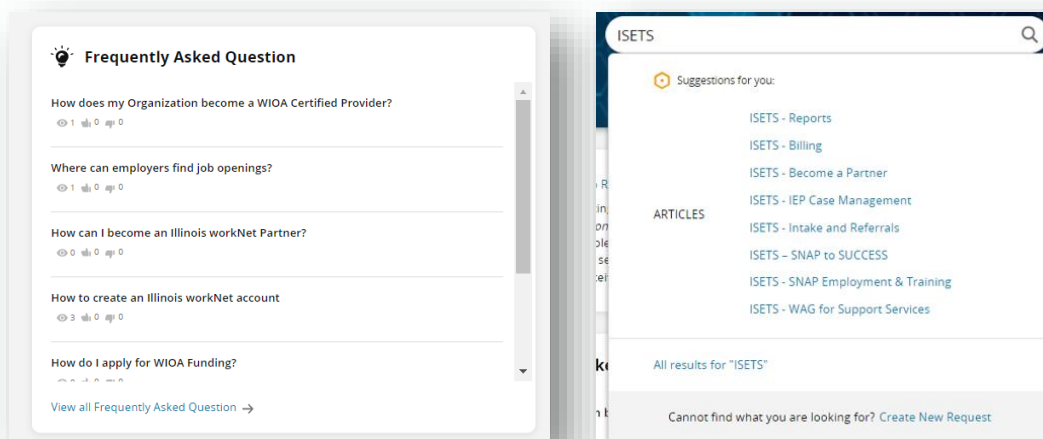
Options include:

- Submit a new Help Request.
- Browse Knowledge Base for answers to questions.
- Browse Frequently Asked Questions.
- Visit program partner pages.
- Return to Illinois workNet.
- View a video tutorial and/or written instructions.

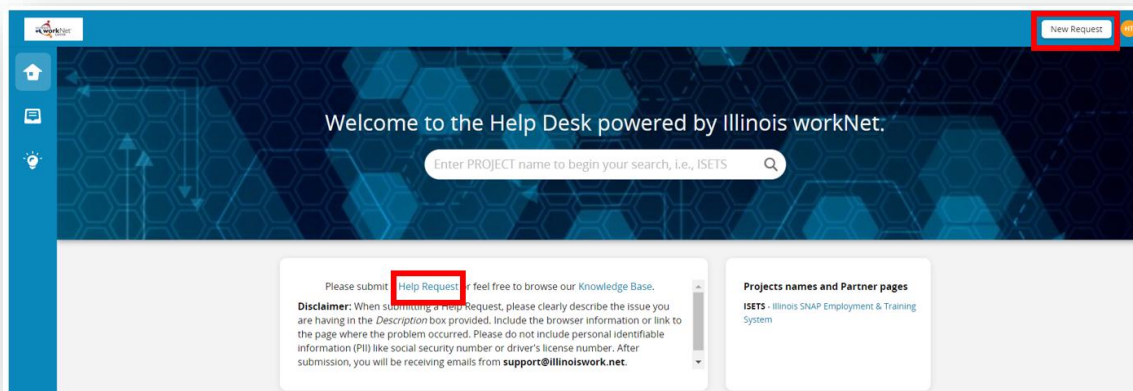




- Before submitting a Help Request, utilize the Knowledge Base by browsing the **Frequently Asked Questions** and specific program articles. Articles can be searched by typing the program name in the search box.



- On the Home screen, submit a new Help Request by clicking Help Request in the middle of the page or by clicking New Request on the top right.





5. Begin filling out the new request. Complete the “Help Request” and “Description” fields.

The “Help Request” field is a summary of the issue.

For example: *I cannot enter information into the search field on the Outcomes page.*

This field is required.

The “Description” field is for clearly describing the issue.

The Description box allows you to:

- Attach documents using the paperclip feature under the box.
 - Insert pictures.
 - Insert videos.
 - Insert links.
5. Click the “Category” drop down and select ISETS from the dropdown. This field is required.

6. Click the “Subcategory” drop down. This field is required.

Best Practice

When describing an issue include the browser information or link to the page where the problem occurred. **DO NOT** include personal identifiable information (PII) like a social security number.



- The “CC” field is not a required field, however, ISETS users should. You may want to include co-worker or managers in this field to notify them of the Help Request. Additional emails that may be used also include:

ISETS Access - DHS.ISETS.Access@illinois.gov – to add additional users

ISETS Policy - DHS.ISETS.Policy@illinois.gov – for questions about policy

CC

Best Practice

ALWAYS include your manager in the CC field in a Help Request.

- Add your name in the “Requester First Name” and “Requester Last Name” fields. Also add your email address in the “Requester Email Address” field. These are required fields.

Requester First Name *

Requester Last Name *

Requester Email address should prefill the box. If it does not, enter the email address associated with the requester’s Illinois workNet account.

Requester Email Address *

- “Are you a Partner/Provider” is a required field. Select Yes or No.
- The “Organization” field is not required for individual users but is required for Partner/Providers.
- The “Phone Number” field is required for Partner/Providers. Add an Extension Number if applicable.

Are you a Partner/Provider? *

Not Set

Not Set

No

Yes



Are you a Partner/Provider? *

Yes

Organization *

Phone Number *

Extension Number

12. If this issue is related to a specific customer record, please select yes and add the customer email address, first and last name so ISETS staff can locate the correct customer record.

Is this an issue related to a specific customer?

Yes

Customer Email Address *

Customer First Name *

Customer Last Name *

13. If this issue is preventing you from moving forward, please click the check box to indicate that so we can prioritize your request.
14. After reviewing the information entered, click Create at the bottom of the page to submit the new Help Request.

☐ Is the issue keeping you from moving forward?



A notification email is sent (within minutes) following submission of the Help Request. Check your spam folder for emails from the Help Desk powered by Illinois workNet. Additional email notifications will arrive with follow-up comments and questions.

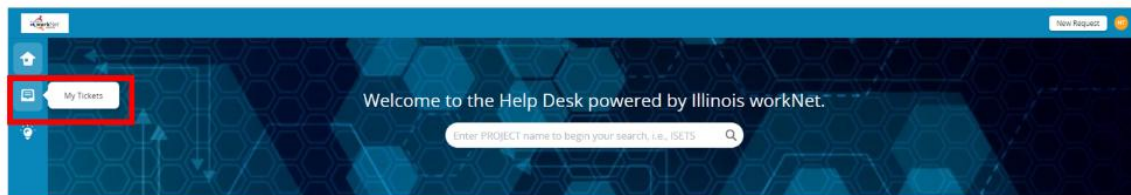
Reply to email messages within 14 business days or your Help Requests will be closed. Once the request is closed, a new help request will need to be created.

A final email notification is sent when requests are Resolved. Prior to marking an issue as resolved, the project manager for Illinois workNet, may send an update with actions taken to resolve the issue.



Viewing Your Help Request Tickets

1. On the Help Desk main page, click the “My Tickets” icon on the left hand side of the screen.
2. Click on the Help Request to view more details or comments.



The following should always be sent through the ticketing system:

- New user requests provided you give a birth date and upload the IL444-2022 form.
- Remove user requests provided the request comes from management staff authorized in ISETS.
- Errors or bugs in the system.
- Questions about where to find something or how to do something in ISETS.

SNAP Policy and program procedure questions will be directed to DHS.ISETS.Policy@illinois.gov and will cc your Provider Manager.

- Policy or procedure questions should be directed to your Provider Manager first.

All questions will be directed to the appropriate department and responded to within 48 business hours.

Any questions, concerns or update requests should be sent to DHS.ISETS.Policy@illinois.gov



Additional Training

Additional training can be arranged to assist you and your Providers. Because staff ability to perform individualized training webinars or virtual sessions is very limited, these are scheduled after all other training options have been consumed including:

- Online ISETS Training modules
- Recordings of past trainings
- Live TA sessions for Q&A
- This manual

Your manager will arrange specialized training sessions so that everyone in your role/team has the opportunity to attend. To request additional training, contact your manager.

To arrange additional training sessions for your Providers, please consult with your Providers to clarify what information/processes they need instruction on and when they are available. It is best to schedule several Providers to attend together if they all have the same need. Once you're sure what training you need and for how many providers, submit a Help Request with the details.



Definitions

These definitions help clarify the language used in this manual and in the E&T Program.

- **Active:** A customer is considered in “Active” status in SNAP E&T if they are enrolled with a Provider and have at least one SNAP E&T Activity with the “open/started” status.
- **Employment:** A customer is considered employed when they are offered and accept a job offer and begin work. Customers employed for more than 20 hour/week must be enrolled in Job Retention and offered Job Retention supports for at least 90 days. Customers employed for less than 20 hours/week may participate in SNAP E&T as if they are not employed if they remain eligible.
- **Exited:** A customer is exited from the SNAP E&T program if they become ineligible, successfully complete the program, or when they Unsuccessfully Complete the program. Once a customer is exited, the intake, assessment, referral, and enrollment process must be completed again if they want to return to the program.
- **Inactive:** A customer is considered in “Inactive” status in SNAP E&T if they are enrolled but not currently participating in the program temporarily.
- **Job Retention:** Job Retention is a SNAP E&T Activity where customers are offered support to help them retain their job throughout the standard 90-day probationary period.
- **Other Activity:** Other allowable activities which are able to be tracked in the ISETS system but are not SNAP E&T Activities. A customer must be enrolled in a SNAP E&T Activity prior to being enrolled in any Other Activities.
- **Referral** – made from an agency or FCRC to an agency.
- **Reverse Referral** – made from an agency to an FCRC for approval for customer participation.
- **SNAP E&T Activity:** SNAP E&T Activities outlined in the SNAP State Plan. A customer must be enrolled in a SNAP E&T Activity prior to being enrolled in any Other Activities. A customer must also be enrolled in a SNAP E&T Activity prior to enrolling a customer in the Job Retention Activity.
- **Staffing:** A staffing is a monthly requirement for all Providers and their Provider Managers. This is a meeting to review all monthly reporting and to discuss individual customers who have become employed, are being exited from the program, or who require additional supports or a change in services/activities. This is an opportunity for Providers to get questions answered and get additional support from their Provider Managers.
- **Successful Completion:** When a customer completes a training class/activity earning a certificate of completion or an industry certification. This may also refer to a customer who obtains employment while participating in a SNAP E&T Activity.
- **Support Services** – SNAP E&T Support Services allowable under the [Support Service WAG 21-06-11](#)
- **Unsuccessful Completion:** When a customer stops participating in an activity without completing the activity/training. A more common term would be “dropping out” of the activity/training.



ISETS Permissions Rubric

| Action | Partner | Inter. | Prov Mgr | Work Dev | Super Admin | Billing/ IES Data Sync/ Prog Mgr |
|--|---------|--------|----------|----------|-------------|--|
| IES data sync occurs monthly on the 5 th , 13 th , 20 th and 27 th . | | | | | | IES |
| Invite and Enroll | | | | | | |
| Search IES | X | X | X | X | X | |
| Add customer not in sync | | | X | X | X | |
| Initial Assessment | X | X | X | X | X | |
| Needs Assessment | X | X | X | X | X | |
| Update Assessment | X | X | X | X | X | |
| Approve reverse referral | | X | | X | X | |
| Accept referral from IDHS | X | X | X | | X | |
| Follow-up response to a referral from IDHS | X | X | X | | X | |
| Revoke referral consent | X | X | X | X | X | |
| Close referral | | | | X | X | |
| Exit referral | | | | | X | |
| Edit a referral | | | | | X | |
| Remove Referral | | | | | X | |
| Enroll participant | X | X | X | X | X | |
| Edit Enrollment date | | | | | X | |
| Update name, address, email, phone, county, DOB, SSN, and ABAWD – through ABE so that IES gets updated | | | | | X | IES |
| Status Section | | | | | | |
| Update Redetermination Date | X | X | X | X | X | IES |
| Update Midpoint Date | | | | | | IES |
| Update E&T Status | X | X | X | X | X | IES |
| Custom E&T Status – history except during Retention | X | X | X | X | X | |
| Update Universal Assessment – Individual and Needs | X | X | X | X | X | |
| Update Level of Progress – ((auto update from 2606/2610)) manual except from Exit | X | X | X | X | X | |
| Custom level of progress date | X | X | X | X | X | |



ISETS Permissions Rubric

| Action | Partner | Inter. | Prov Mgr | Work Dev | Super Admin | Billing/ IES Data Sync/ Prog Mgr |
|--|---------|--------|----------|----------|-------------|---|
| Status Section | | | | | | |
| Update Employment Verification – auto update from employment | x | x | x | x | x | |
| Update SNAP Case Number | x | x | x | x | x | IES |
| Update SNAP Eligibility Status | | | x | x | x | IES |
| Custom Eligibility status | | | x | x | x | |
| Update Individual Number | x | x | x | x | x | IES |
| Update Earnfare Benefit Amount History | | | x | x | x | |
| Remove Earnfare Benefit amount | | | x | x | x | |
| | | | | | | |
| | | | | | | |
| Summary Tools – Customer Profiles | | | | | | |
| Uploads | x | x | x | x | x | |
| Delete Uploads | X | X | X | x | x | |
| Casenotes – Add | X | X | X | X | x | |
| Case Notes – Delete (partner requests) | | | | | x | |
| Assessments – Add | X | X | X | X | X | |
| Worksites – Add | X | X | X | X | x | |
| Uploads – Add | X | X | X | X | X | |
| Uploads – Remove | x | X | x | x | x | |
| | | | | | | |
| EP/Case Management | | | | | | |
| Add Activities – if not open | X | X | X | X | X | |
| Edit Activity – start/end date | x | | X | X | x | |
| Edit Activity after completed | | | X | X | x | |
| Edit Activity after exit | | | X | X | x | |
| Activity – Delete – not staffed | X | X | X | X | x | |
| Activity – Delete - staffing complete | | | | | x | |
| Attendance – Add/verify | X | X | X | X | x | |
| Attendance – edit verified | | | | | x | |
| Attendance – un-verify | | x | x | x | x | |
| | | | | | | |
| Support Services | | | | | | |
| Add support services | X | x | X | X | x | |
| Update support services after exit | | | X | | x | |
| Add Override request | X | X | X | X | x | |
| Delete Override request | X | X | X | X | x | |
| Approve Override | | | | | x | |
| Delete approved Override request | | | | | X | |



ISETS Permissions Rubric

| Action | Partner | Inter. | Prov Mgr | Work Dev | Super Admin | Billing/ IES Data Sync/ Prog Mgr |
|--|---------|--------|-------------|-------------|----------------|--|
| Support Services | | | | | | |
| Add after staffing submitted | X | X | X | X | x | |
| Approve change request | | | x | x | x | |
| Add cost after staffing approved by billing – Amendment – row is a red color in table | x | x | x | x | x | |
| Approve amendments | | | x | x | x | |
| | | | | | | |
| Complete/Exit | | | | | | |
| Complete/Exit a customer record – meet req. | X | X | X | X | x | |
| Edit a customer completion | | | | | X | |
| | | | | | | |
| After Exit | | | | | | |
| Access to profile until referral is closed | X | X | X | X | x | |
| | | | | | | |
| Employment | | | | | | |
| Add employment | X | X | X | X | x | |
| Edit employment | X | X | X | X | x | |
| Verify employment uploads | | X | X | x | x | |
| Verify post- 90-day retention uploads | | X | X | X | x | |
| Delete Employment record – on open emp. | | | | | X | |
| | | | | | | |
| Staffing – customer record | | | | | | |
| Customer record 4334 – sign as DHS | | | X | X | X | |
| Customer record 4334 – sign as partner | X | x | | | | |
| 2606 | X | X | X | X | X | |
| 2610 | X | X | X | X | X | |
| Amend 2610 | | | X | | x | |
| Amend 2606 | X | X | X | X | X | |
| | | | | | | |
| Provider Information | | | | | | |
| Appointments | | | | | x | |
| Edit Site, Edit Schedule, Remove Site | X | X | X | X | x | |
| File Upload | X | X | X | X | x | |
| File Upload – Delete - none related to staffing | | | | | x | |
| ISETS Provider Details | | | | | | |
| Entering contracts | | | | | x | |
| View contract | X | X | x | | | |
| Edit contract | | | | | x | |



ISETS Permissions Rubric

| Action | Partner | Inter. | Prov Mgr | Work Dev | Super Admin | Billing/ IES Data Sync/ Prog Mgr |
|---|---------|--------|----------|----------|-------------|---|
| Provider Information | | | | | | |
| Add sub-grantee | | | | | x | |
| View sub-grantee information | | x | | | | |
| Add/remove location to partner record | | | | | x | |
| Add/remove Audit | | | X | | x | |
| Add/Edit worksite | X | X | X | | x | |
| Add/remove Services to use on the career plan | | x | x | | x | |
| ISETS E&T Programs | | | | | | |
| Add Program | | | | | x | Prog Mgr |
| Edit Program | | | x | x | x | Prog Mgr |
| Add Agency related Case Notes | x | x | x | x | x | |
| Adding new partners | | | | | x | |
| | | | | | | |
| Reports | | | | | | |
| | | | | | | Billing |
| | | | | | | |
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ISETS Data Integrity Checklist for Providers

Use this checklist to review your caseload and ensure participant records are complete, timely, and accurately reflect program engagement. This should be reviewed **monthly** or **quarterly** in alignment with your organization's workflow.

Participant Status Updates

- ☐ Participants who should have been exited
 - ☐ Participant has completed all activities, shows no engagement, but is still marked as “Active.”
 - ☐ ✓ Action: Enter current case notes/attendance or exit with date and reason.
- ☐ “Active” participants with no recent activity
 - ☐ No attendance and/or case notes in over 2 weeks.
 - ☐ ✓ Action: Add current engagement documentation or exit.
- ☐ Participants inactive for over 30 days (flagged on dashboard)
 - ☐ ✓ Action: Move to “Active” if re-engaged or exit appropriately.
- ☐ Referred but never enrolled
 - ☐ Approved referral exists but no enrollment history.
 - ☐ ✓ Action: Notify IDHS if past referral window; IDHS to close after defined timeframe (e.g., 10 business days).

Ongoing Case Management

- ☐ Attendance records are updated weekly
- ☐ All participants in active components have logged attendance if required.
- ☐ Supportive service entries are complete and timely
- ☐ Amount, date, and service type documented.
- ☐ Case notes are current and reflect meaningful engagement
- ☐ Last note should be within past 2 weeks for “Active” participants.

Exit Documentation

- ☐ Exit date and reason are recorded for all exited participants
- ☐ Post-exit employment (within 60 days) is entered, if applicable
- ☐ Credentials, skills gained, and outcomes are documented
- ☐ At least one success story submitted per quarter (if applicable)



ISETS Data Integrity Checklist for Providers Cont.



Reporting & Billing Monthly and Quarterly

- ☐ Staffing & Billing reports are submitted on time
- ☐ All required fields are complete—no system-rejected reports
- ☐ Eligibility verified before submitting reimbursement



Data Review & Quality Assurance

- ☐ Review dashboard flags weekly
- ☐ Inactive, overdue exits, referral gaps
- ☐ Participate in data integrity reviews
- ☐ Respond to Provider Manager audits or escalation reports.
- ☐ Correct any recurring data errors identified by TA or audits
- ☐ Engage in TA calls or micro-trainings to stay current on data standards



Provider End-of-Year (EOY) Checklist

This checklist supports Providers in finalizing program and fiscal responsibilities by the end of each fiscal year. Completing these items ensures accurate reporting, successful reconciliation, and timely payments.

Program and Participant Data

- ☐ **Exit all customers who will not be carrying over to the next year (this includes all Earnfare customers at the end of every program year)**
 - Ensure all services have ended and appropriate exit reasons are selected.
- ☐ **Finalize post-exit outcomes**
 - Enter all known employment outcomes, credentials, and success stories.
- ☐ **Clear inactive participant flags**
 - Review participants marked inactive for over 45 days and update status.
- ☐ **Close out referrals**
 - For any pending or unused referrals, confirm resolution or notify IDHS.
- ☐ **Complete all open case notes and attendance**
 - Ensure recent activities are fully documented for active participants.

Staffing & Billing Reports

- ☐ **Reconcile any missing or rejected entries**
 - Review reports that failed submission or were returned for revision.
- ☐ **Verify supportive services and expenses**
 - Confirm accuracy of all entries; reconcile totals with your internal logs.
- ☐ **Submit all monthly Staffing & Billing reports**
 - Ensure every month of the fiscal year is completed and approved.
- ☐ **Submit year-end financial data (if required)**
 - Includes final Ledger reconciliation and billing summaries.

Performance and Documentation

- ☐ **Review Periodic Performance Report**
 - Verify outcomes toward contract goals are correctly reported.
- ☐ **Submit any remaining credentials or employment verifications**
 - Ensure all achievements are logged and reflected in the year-end report.
- ☐ **Complete Success Story submissions**
 - At least one per quarter, or a cumulative summary for the year.

Provider Manager/IDHS Coordination

- ☐ **Respond to any Provider Manager audit flags**
 - Resolve pending issues noted in Inactive Participant or Integrity Reports.
- ☐ **Confirm year-end checklist completion with IDHS contact**
 - Submit confirmation email and address any final clarifications.