

ISETS Permissions Rubric

This document identifies the partner position title and the actions that they can take.

Action	Partner	Inter.	Prov Mgr	Work Dev	Billing	Super Admin	IETS Data Sync/ Prog Mgr IES
IETS data sync occurs monthly on the 5 th , 13 th , 20 th and 27 th . <i>If a customer is eligible in IES, it may take up to 2 syncs before the customer appears on the list.</i>							
Invite and Enroll							
Search IES	X	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	
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		X	
Remove Referral				X		X	
Enroll participant	X	X	X	X		X	
Edit Enrollment date						X	
Update name, address, email, phone, county, DOB, SSN, and ABAWD – <i>through ABE so that IES gets updated</i>						X	IETS
Status Section							
Update Redetermination Date		X	X	X		X	IETS
Update Midpoint Date							IETS
Update E&T Status	X	X	X	X	X	X	IETS
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 – <i>((auto update from 2606/2610))</i> manual except from Exit	X	X	X	X		X	
Custom level of progress date	X	X	X	X		X	
Update Employment Verification – auto update from employment	X	X	X	X		X	

Action	Partner	Inter.	Prov Mgr	Work Dev	Billing	Super Admin	IES Data Sync/ Prog Mgr
Update SNAP Case Number			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	IES
Update Earnfare Benefit Amount History			X	X	X	X	
Remove Earnfare Benefit amount			X	X	X	X	
Summary Tools – Customer Profiles							
Uploads	X	X	X	X	X	X	
Delete Uploads	X	X	X	X		X	
Casenotes – Add	X	X	X	X	X	X	
Case Notes – Delete (partner requests)						X	Prog Mgr
Assessments – Add	X	X	X	X		X	
Worksites – Add	X	X	X	X		X	
Uploads – Add	X	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		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 - <i>staffing complete</i>						X	
Attendance – Add/verify	X	X	X	X		X	
Attendance – edit verified						X	
Attendance – un-verify	X	X	X	X		X	
Support Services							
Add support services	X	X	X	X		X	
Update support services after exit		X				X	Prog Mgr
Add Override request	X	X	X	X		X	
Delete Override request	X	X	X	X		X	
Approve Override						X	Prog Mgr
Delete approved Override request						X	
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	X	Prog Mgr
Complete/Exit							
Complete/Exit a customer record – meet req.	X	X	X	X		X	
Edit a customer completion				X		X	

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After Exit							
Access to profile until referral is closed	X	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				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		X	
Amend 2606	X	X	X	X		X	
Provider Information							
Appointments	X	X				X	
Edit Site, Edit Schedule, Remove Site	X	X	X	X		X	
File Upload	X	X	X	X	X	X	Prog Mgr
File Upload – Delete - none related to staffing						X	
ISETS Provider Details							
Enter new contracts						X	
View contract	X	X	X	X	X	X	Prog Mgr
Edit contract					X	X	Prog Mgr
Add sub-grantee						X	Prog Mgr
View sub-grantee information		X	X	X	X	X	Prog Mgr
Add/remove location to partner record		X	X			X	
Add/remove Audit			X			X	Prog Mgr
Add/Edit worksite	X	X	X			X	
Add/remove Services to use on the career plan		X	X			X	Prog Mgr
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	X	
Adding new partners						X	Prog Mgr
Reports							



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Action	Partner	Inter.	Prov Mgr	Work Dev	Billing	Super Admin	IES Data Sync/ Prog Mgr
Case Note Deletion Request Report						X	Prog Mgr
Super Admin Report						X	Prog Mgr
Staffing & Billing Tools	X	X	X	X	X	X	
Overall Staffing Report		X	X	X	X	X	
All Participants Who Received Benefits Summary (4333)	X	X	X	X	X	X	
Supportive Services Summary	X	X	X	X	X	X	
Earnfare Referral and Attendance (2606) Summary	X	X	X	X	X	X	
Consolidated Benefits Summary (4333)	X	X	X	X	X	X	
Consolidated Supportive Services Summary	X	X	X	X	X	X	
Consolidated Snap To Success Financial Report	X	X	X	X	X	X	
Employment Report	X	X	X	X	X	X	
Snap To Success Financial Report	X	X	X	X	X	X	
Quarterly Interest Report Summary	X	X	X	X	X	X	
SNAP Monthly Total Expense Report	X	X	X	X	X	X	
FNS Report				X		X	Prog Mgr
Year End Reports	X	X	X	X	X	X	
Periodic Performance Report	X	X	X	X	X	X	
Amended Report History List			X	X	X	X	Prog Mgr
Customer Services Report	X	X	X	X		X	
Credentials Report	X	X	X	X	X	X	
Costs Color Differences							
<i>Yellow highlight – amendment approved</i>							
<i>Red font – override approved</i>							
<i>Gold Triangle – pending override</i>							
<i>Red Triangle – change to staffing</i>							