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Purpose and Users

Purpose

ISETS Intake tools to check the customer’s SNAP eligibility status, complete a universal assessment, view recommended providers/programs, send reverse referrals, and make referrals to other providers.

Users

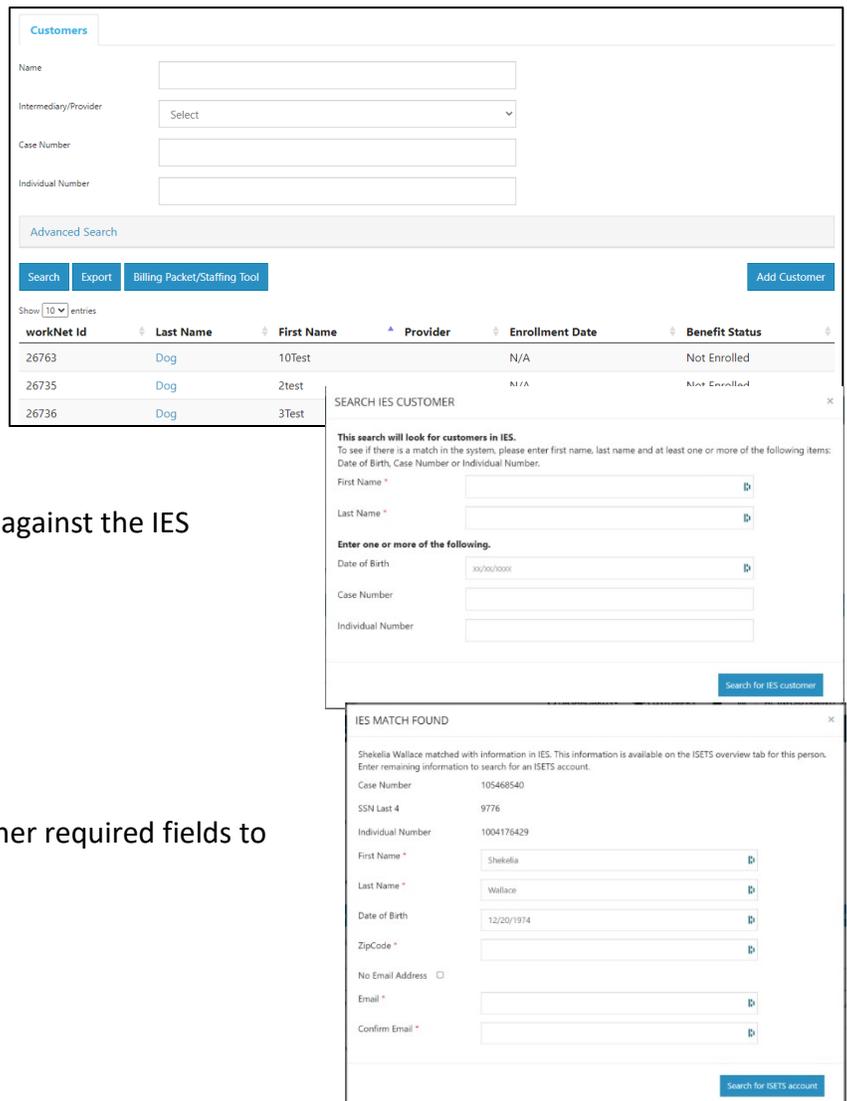
- **IDHS State Level Admin** - Will have access to all tools and provider/customer information. They will set up provider, contract information, and partner accounts.
- **IDHS Provider Managers** - Will have access to all tools and provider/customer information in their region.
- **IDHS Program Managers** – Will have access to all provider tools and customers associated with their organization. They will also have access to specific administrative tools related to contracts.
- **IDHS Case Managers** - Will have access to all Provider tools and customers that are associated with their organization.
- **CBO/Other E&T Providers** - Will have access to all Provider tools and customers that are associated with their organization.
- **IDHS Billing Managers** - Will have access to the billing module. They cannot access the customer level profile/data collection tools.

Definitions

- **Referral** – made from an agency or FCRC to an agency.
- **Reverse Referral** – made from an agency to an FCRC for approval for customer participation.
- **Add Activities / Services** – provider adds services that they will be offering without the need of a referral.

Adding/Checking for Customer – DHS Staff

1. Log into <https://apps.illinoisworknet.com/SiteAdministration/IDHSET/Admin> ((See an alternate log-in option below))and
2. Click on **ISETS** in the group list.
3. A list will open of your existing customers. Click the **Add Customer** button to add a new customer or search for an existing customer from the IES database.
4. Fill in the required information. Include at least one of the numbers:
 - a. Social Security number
 - b. Case Number
 - c. Individual Number
 - d. Click **Search for existing customer**.
5. ISETS will search for an existing customer against the IES database.

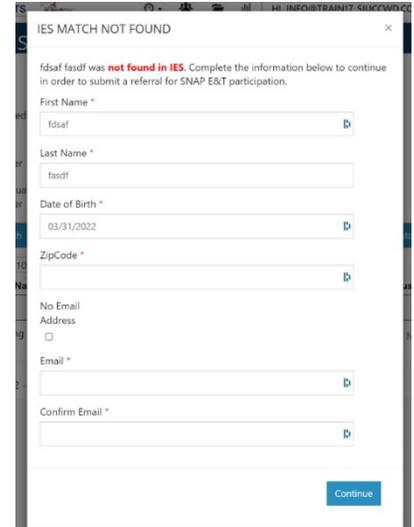


The screenshot shows the 'Customers' management interface. At the top, there are input fields for Name, Intermediary/Provider (a dropdown menu), Case Number, and Individual Number. Below these is an 'Advanced Search' section with buttons for 'Search', 'Export', and 'Billing Packet/Staffing Tool', and an 'Add Customer' button. A table displays a list of customers with columns for workNet Id, Last Name, First Name, Provider, Enrollment Date, and Benefit Status. The table contains three rows of data. Below the table is a 'SEARCH IES CUSTOMER' modal window. This modal has a title 'SEARCH IES CUSTOMER' and a close button. It contains a message: 'This search will look for customers in IES. To see if there is a match in the system, please enter first name, last name and at least one of the following items: Date of Birth, Case Number or Individual Number.' Below this message are input fields for First Name, Last Name, Date of Birth (with a date format 'xx/xx/xxxx'), Case Number, and Individual Number. There is a 'Search for IES customer' button at the bottom right of the modal. A second modal window titled 'IES MATCH FOUND' is overlaid on the bottom right. It contains the message: 'Shakella Wallace 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.' Below this message are input fields for Case Number (105468540), SSN Last 4 (9776), Individual Number (1004176429), First Name (Shakella), Last Name (Wallace), Date of Birth (12/20/1974), ZipCode, No Email Address (checkbox), Email, and Confirm Email. There is a 'Search for ISETS account' button at the bottom right of this modal.

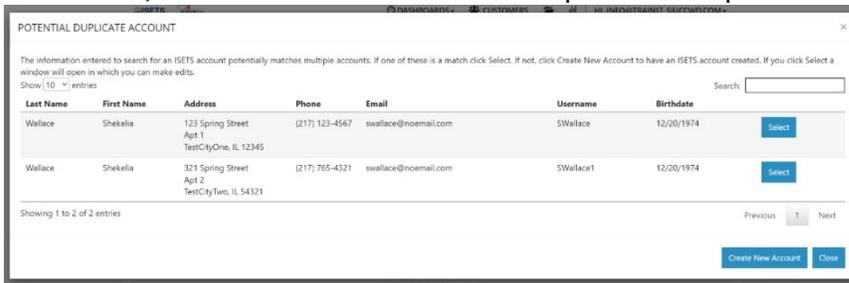
workNet Id	Last Name	First Name	Provider	Enrollment Date	Benefit Status
26763	Dog	10Test		N/A	Not Enrolled
26735	Dog	2test		N/A	Not Enrolled
26736	Dog	3Test			

- a. If IES match IS found, enter the other required fields to search for an ISETS account.

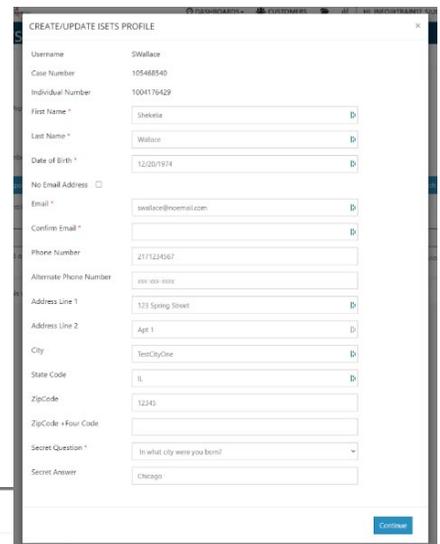
- b. If an IES match is **not found**, make sure the data points entered are correct. To make a correction, “X” out of the window, correct the data, click the button “Search for IES customer”.
- c. If an IES match is **not found** and the data is correct, proceed with entering the other required fields to search for an ISETS account.



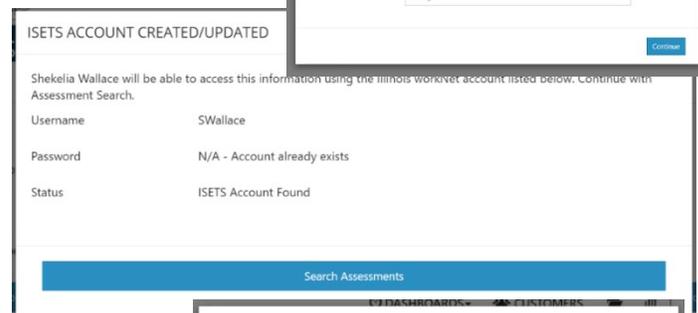
- d. If ISETS match is found but there are potential duplicate accounts, determine if any of the potential accounts are a match, click the **Select** button. Make any updates in the fields, click **Continue** button.
- e. If ISETS match is found but there are potential duplicate accounts, if none of the potential matches are correct, click **Create New Account**. Complete the required information and click **Continue**.



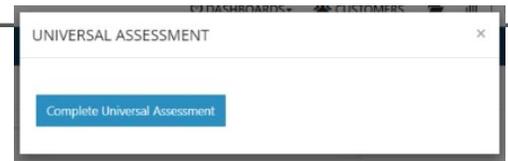
Last Name	First Name	Address	Phone	Email	Username	Birthdate
Wallace	Shekela	123 Spring Street, Apt 1, TestCityOne, IL 12345	(217) 123-4567	swallace@noemail.com	SWallace	12/20/1974
Wallace	Shekela	321 Spring Street, Apt 2, TestCityTwo, IL 54321	(217) 765-4321	swallace@noemail.com	SWallace1	12/20/1974



- f. Upon addition of the customer, the next window that shows contains the customer username and password (if it is a new account). *Note: It is a good idea to write down the Username and temporary Password for the customer.*

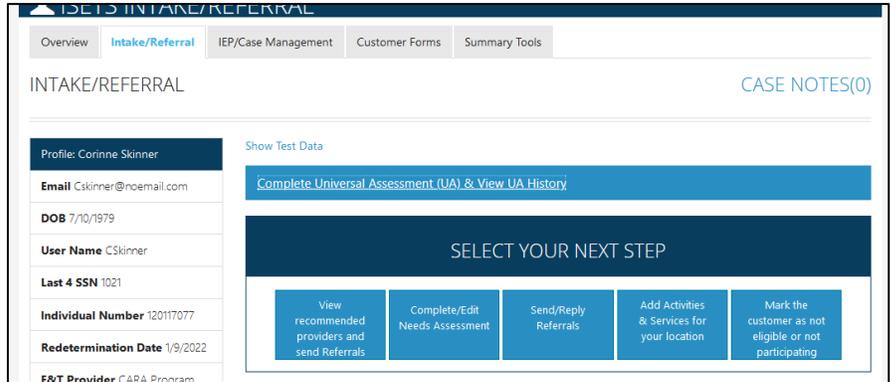


- 6. Click the button to **Search for assessment**.
 - a. If a SNAP customer is found, **Complete the Universal Assessment – Initial Screening**.
 - b. The provider must also complete the universal assessment before clicking **Send a Reverse Referral**.
 - c. NOTE: DHS Workforce Development Staff and Super Admin staff will be able to assign a customer directly to a provider without completing an assessment.



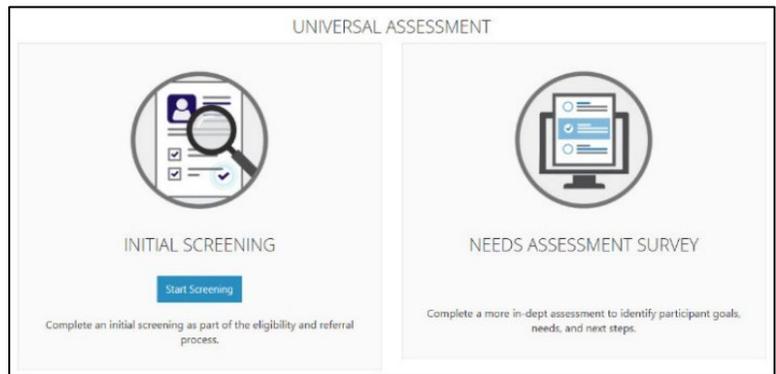
- 7. Click the button to **Search for assessments**.
 - a. If a SNAP/TANF customer is found, **Complete the Universal Assessment – Initial Screening**.

- b. DHS staff are only required to complete the initial assessment before sending a referral to a service provider. The service provider must complete the universal assessment before clicking Send a Reverse Referral.
- c. The Universal Assessment and Referrals can also be completed from the Intake page on the customer profile.
- d. If a SNAP customer is not currently eligible in IES, complete the initial screening assessment. The customer may become eligible.



Complete the Universal Assessment (UA) Initial Screening

1. Select **Complete the Universal Assessment**.
2. Select **Start Screening**.
3. Complete each section of the Assessment. As sections are completed the row across the top will show the progress and the current section.

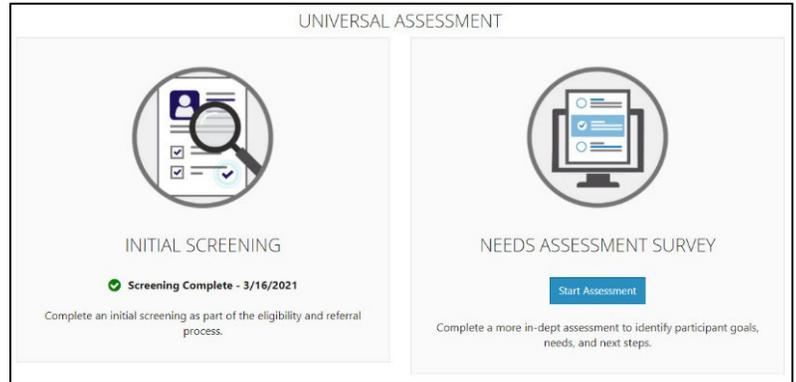


4. On the last tab, click **Submit Application**.
5. Review the information in the Pre-Screening Summary for the customer. Click the section to make edits to that section's information. Save the information before leaving the page.
6. Click **Save and Return to Summary** when done.

Complete the UA Needs Assessment

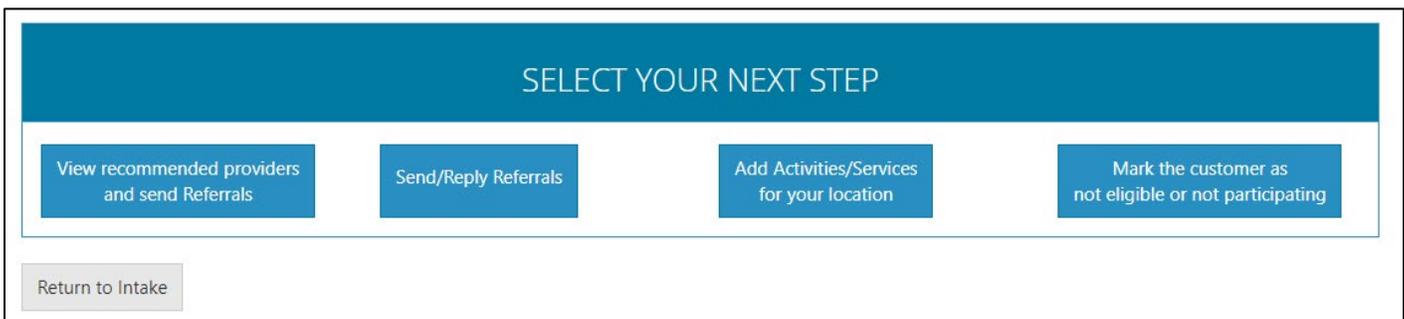
If the DHS office completing the assessment is also the service provider, the needs assessment must also be completed.

7. Select Complete the Universal Assessment – Needs Assessment Survey.
8. Select **Start Assessment**.
9. Complete more details for each section of the Universal Assessment. As sections are completed the row across the top will show the progress and the current section.
10. On the last tab, click **Submit Application**.



11. Review the information in the Pre-Screening Summary for the customer. Click the section to make edits to that section’s information. Save the information before leaving the page.
12. Click **Save and Return to Summary** when done.
13. At the bottom of the summary select your next step.

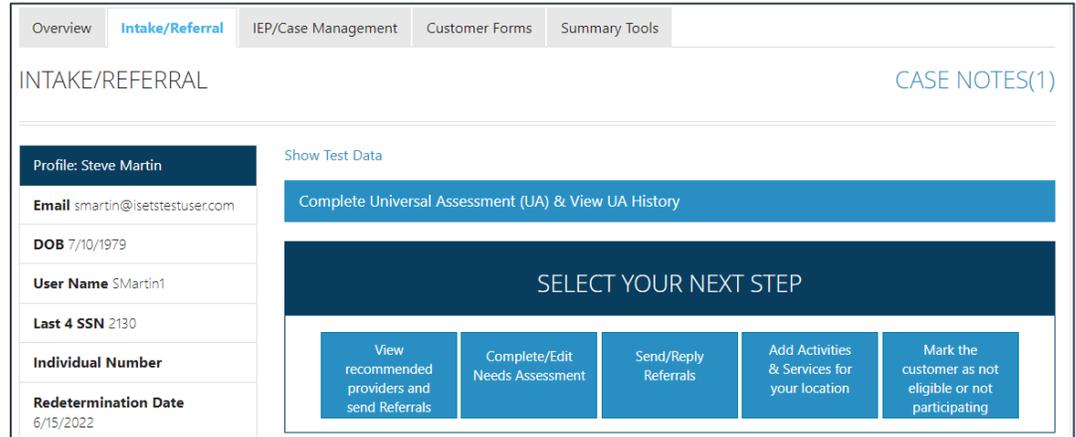
View Recommended providers and Send Referrals



Note: for an agency to provide any services, a reverse referral must be approved by a DHS E&T representative or costs associated with services provided prior to approval may be disallowed.

DHS Making a Referral to a Provider:

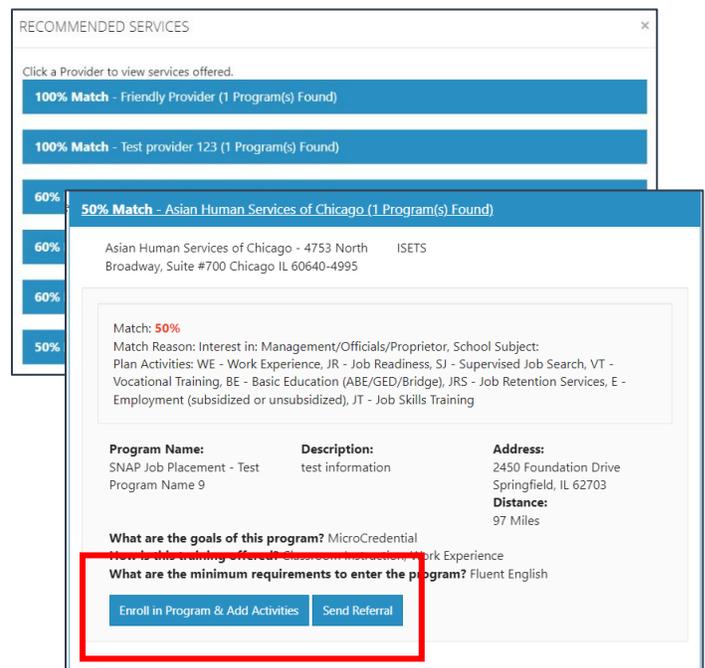
At the bottom of the assessment summary, click the button **View Recommended providers and send Referrals**. This same selection option may be found on the Intake/Referral tab on the customer profile.



The screenshot shows the 'Intake/Referral' page for a customer named Steve Martin. On the left is a profile card with details like email, DOB, and SSN. On the right, there's a 'SELECT YOUR NEXT STEP' menu with five options: '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'.

View Recommended Providers

1. Select **View recommended providers and send referrals** from the Intake/Referral page.
2. Suggested providers will open in a list with the percentage of match noted. 100% matches will be at the top of the list for any organization that matches with the participant. Click the **blue bar** with the match to open the match information for that provider/service. *Click the 0% matches to see other possibilities and why they were not a match.*
3. Click **Enroll in Program & Add Activities** to add an activity or service to the customer's IEP/Case Management.
4. Click **Send Referral** to open the screen to send a referral to a service provider.



The screenshot shows a 'RECOMMENDED SERVICES' window. It lists providers with their match percentages: 100% Match - Friendly Provider, 100% Match - Test provider 123, and 50% Match - Asian Human Services of Chicago. The 50% match is selected, showing details for 'Asian Human Services of Chicago' including address, program name, and description. At the bottom, two buttons are highlighted with a red box: 'Enroll in Program & Add Activities' and 'Send Referral'.

Send referral from Matched Items.

1. Click **Send Referral** to open the screen to send a referral to that agency.
2. Click **Add Referral**.
3. Select the **Refer To** option of Provider.
4. Select the organization from the dropdown list sorted by distance.

5. Complete the **Customer Consent** form by entering the customer username and customer password. *Customer username is listed in the modal, the password is the customer Lastname and six digit birthdate i.e. Smith010197* Check the box after the customer reads and agrees to the terms. Then click **Submit Consent**. *Note: If you are not automatically redirected back to the referral form, Click Add Referral again to select the agency and you will be able to continue.*
6. Select an **appointment location**.
7. Select an **appointment date**.
8. Select **Services Needed**. Services are available based upon the contract with that provider. They include: Earnfare, Snap2Success, SNAP Job Placement, SNAP Special Projects, SNAP Supportive Services, TANF JP, TANF Supportive Services, Work First.
9. Select the **Refer From** agency if you have access to more than one.
10. Add any additional notes.
11. Mark whether if the customer is receiving **SNAP** and if they are **Eligible for E&T services**.
12. Click **Submit**.
13. **Print** the referral form for the customer.

ISETS CUSTOMER FORMS

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

CUSTOMER FORMS

Profile: Pam Penny
 Email: ppenny@noemail.com
 DOB: 7/10/1979
 User Name: PPenny
 Last 4 SSN: 1003
 Individual Number: 771771003
 Redetermination Date: 10/5/2021

REFERRALS [Add Referral]

#	Referred To	Referred From	Other Notes	Added	Referral Form	Status
1	Haymarket	Asian Human Services		8/24/2021	Print	
2	Lower North - Cook County	Asian Human Services		5/5/2021	Print	Accepted

Showing 1 to 3 of 3 entries

REFERRAL FORM - (ID: 1.1)

Refer To: Provider FCRC (Reverse Referral)
 Haymarket - 3.7 miles

Participant Being Referred: King, Breanna
 Participant Username: BKING
 Participant Birthday: 4/16/1991

Review Appointment

Select Appointment Site: ISETS Intake

Select Appointment Time:

Select	Date	Time
<input type="radio"/>	10/27/2021	9:00 AM - 10:00 AM
<input type="radio"/>	11/10/2021	9:00 AM - 10:00 AM
<input type="radio"/>	11/17/2021	9:00 AM - 10:00 AM
<input type="radio"/>	11/24/2021	9:00 AM - 10:00 AM
<input type="radio"/>	12/1/2021	9:00 AM - 10:00 AM
<input type="radio"/>	12/8/2021	9:00 AM - 10:00 AM
<input type="radio"/>	12/15/2021	9:00 AM - 10:00 AM
<input type="radio"/>	12/22/2021	9:00 AM - 10:00 AM
<input checked="" type="radio"/>	12/29/2021	9:00 AM - 10:00 AM

Showing 1 to 9 of 9 entries Previous Next

Service Needed: SNAP Job Placement

Other Notes:

Refer From: Lower North - Cook County
 Refer From Marked By: DHS Tvrkdev
 Refer From Date Marked: 6/21/2022

Receives SNAP: Yes No
 Receives SNAP Marked By: DHS Tvrkdev
 Date Marked: 6/21/2022

Eligible for E&T Services: Yes No
 Eligible for E&T Services Marked By: DHS Tvrkdev
 Date Marked: 6/21/2022

Provider Response

Marked By Provider: Not Yet Marked
 Date Marked By Provider: Not Yet Marked

Status:

Client Assessment Completed
 Client Placed on Waiting List
 Client Services Initiated
 No Contact From Client
 Referral Rejected

Provider Notes:

Active Customer Consent for the provider selected has been found:
 Customer Name: Breanna King
 Customer Username: BKING
 Consent Date: 6/21/2022

[Response] [Print 2151 Referral Form for Customer]

Approve / Reject Referrals

1. View the referrals to your location. From the ISETS Dashboard, click on the **Referrals and Redetermination** section of the dashboard.
2. Click the **list view**. Find the section: *Reverse Referrals to FCRC: Unduplicated Customer Count*
3. Click the **number** next to *Reverse Referrals Pending IDHS Response or Reverse Referrals Pending IDHS Response over 48 hours*. This will yield a list of customer names.

RECRUITED

NUMBER OF UNDUPLICATED CUSTOMERS REFERRED: 14
DATA FOR: FY22

6 FCRC Referrals to Providers: Unduplicated Customers Count

- 6 Provider has not responded to FCRC Referral ⓘ
- 6 Provider has not responded within 48 Hours of Orientation Date ⓘ
- 0 Client Assessment Completed ⓘ
- 0 Client Placed on Waiting List ⓘ
- 0 Client Services Initiated ⓘ
- 0 No Contact from Client ⓘ
- 1 Referral Rejected ⓘ
- 24 Total FCRC Referrals to Providers

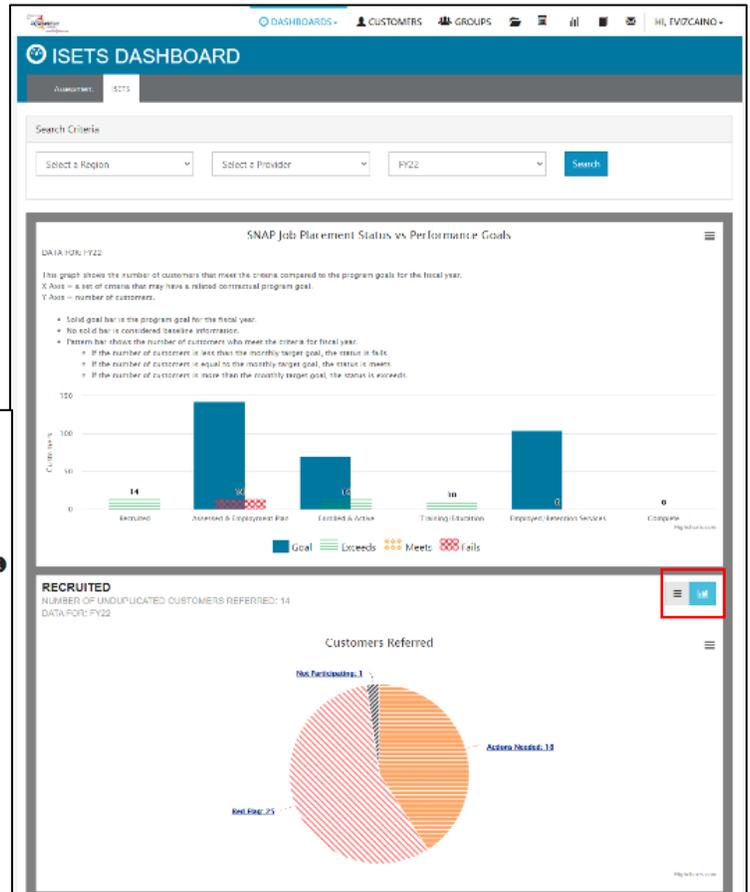
9 Reverse Referrals to FCRC: Unduplicated Customer Count

- 8 Reverse Referrals Pending IDHS Response ⓘ
- 7 Reverse Referrals Pending IDHS Response over 48 hours ⓘ
- 9 Reverse Referrals with IDHS Response ⓘ
- 0 Eligible for E&T Services ⓘ
- 0 Not Eligible for E&T Services ⓘ
- 7 Total Reverse Referrals to FCRC

4 Provider Referrals to Other Providers: Unduplicated Customer Count

- 4 Provider has not responded to Referral ⓘ
- 3 Provider has not responded within 48 hours of referral date ⓘ
- 0 Client Assessment Completed ⓘ
- 0 Client Placed on Waiting List ⓘ
- 0 Client Services Initiated ⓘ
- 0 No contact from Client ⓘ
- 0 Referral Rejected ⓘ
- 7 Total Provider Referrals to Other Providers

0 Referral Not Required to Enrolled with FCRC



ISETS

Customers

Name:

Intermediary/Provider:

Case Number:

Individual Number:

Advanced Search

Search Export Billing Pocket/Staffing Tool Add Customer

Show 10 entries

Last Name	First Name	Provider	Enrollment Date	Benefit Status
Fleming	Ann	Lower North - Cook County	5/5/2021	Enrolled
Colless	Azella	Lower North - Cook County	5/11/2021	Enrolled
King	Breanna	Lower North - Cook County	8/20/2021	Enrolled

Showing 1 to 3 of 3 entries Previous 1 Next

4. Click the **customer last name** to open the customer profile.
5. Click the **Referrals** header on the overview page.
6. Click the **number** by the referral to the FCRC.
7. Check dates for when clients status updates were completed.
8. Mark if customer is receiving SNAP and if they are eligible for E&T services.
9. If the customer is Earnfare include in the Other Notes the amount of money to be worked off. That will be entered on the customer's Overview tab.
10. Click **Respond**

ISETS OVERVIEW

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

OVERVIEW

Profile: Breanna King

Email
breannaking@isetstestuser.com

DOB 4/16/1991

User Name SKing

Last 4 SSN 9364

Individual Number 1008579537

Redetermination Date
1/20/2022

E&T Provider Lower North - Cook County

FCRC Pending

Program Enrollment N/A

[See All](#)

Referrals

[Add Referral](#)

#	Referred To	Referred From	Other Notes	Added	Referral Form	Status
1	Lower North - Cook County	Asian Human Services		8/25/2021	Print	Pending
2	Asian Human Services			8/20/2021	Print	

Showing 1 to 2 of 2 entries

Status

Redetermination Date: 1/20/2022

E&T Status: Active

Provider Response

Status:

Client Assessment Completed

Client Placed on Waiting List

Client Services Initiated

No Contact From Client

Referral Rejected

Provider Notes:

Refer To: Provider FCRC (Reverse Referral)

North Suburban - Cook County - 15.1 miles

Participant Being Referred: Wayne, John

Participant Username: JWayne1

Participant Birthday: 7/10/1979

[Review Assessment](#)

Status: Client Assessment Completed Client Placed on Waiting List

Completed Date: 6/15/2022 Expected Start Date: 6/17/2022

Refer From: Asian Human Services

Refer From Marked By: ISETS 6Partner

Refer From Date Marked: 6/21/2022

Service Needed: Earnfare SNAP 2 Success SNAP Job Placement SNAP Special Projects

Other Notes:

DHS RESPONSE

Receives SNAP: Yes No

Receives SNAP Marked By: Not Yet Marked

Date Marked: Not Yet Marked

Eligible for E&T Services: Yes No

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

Date Marked: Not Yet Marked

Active Customer Consent for the provider selected has been found:

Customer Name: John Wayne
Customer Username: JWayne1
Consent Date: 6/21/2022

[Respond](#) [Print 2151 Referral Form for Customer](#)

Showing 1 to 6 of 6 entries

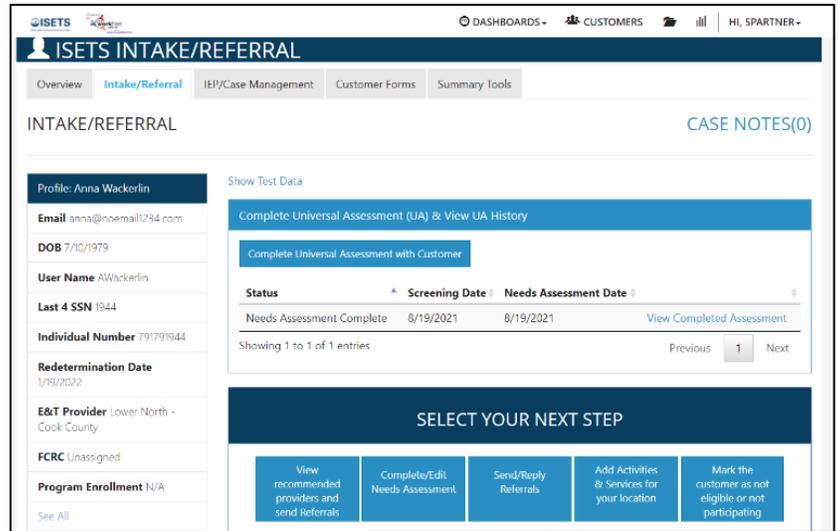
Clients Placed on Waiting List

On the referral form, the service/activity provider marks whether the client is placed on a waiting list.

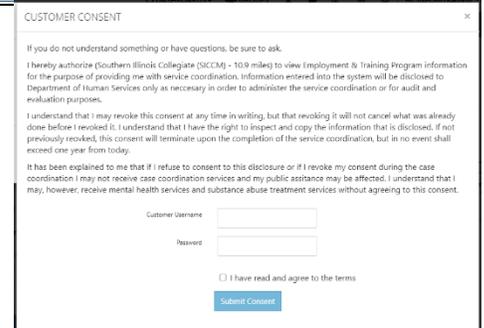
Clients should remain on the waiting list for no more than 14 days before a follow-up action is taken.

Send Referral to an Other Provider

1. Select Your Next Step click on **Send/Reply Referrals**
 2. Click on **Add Referral**.
 3. The Referral form modal opens. Select which type you want to **Other Provider**.
 4. Select an **approved provider**. Select the organization from the dropdown list sorted by closest to furthest away.
 5. Complete the **Customer Consent** form by entering the customer username and customer password. Check the box after the customer reads and agrees to the terms. Then click **Submit Consent**. *Note: If you are not automatically redirected back to the referral form, Click Add Referral again to select the agency and you will be able to continue.*
 6. Select the **Refer From** agency if you have access to more than one.
 7. Add the status of your progress with the customer.
 8. Add any additional notes.
 9. Click **Submit**.
- Print** the referral form for the customer.



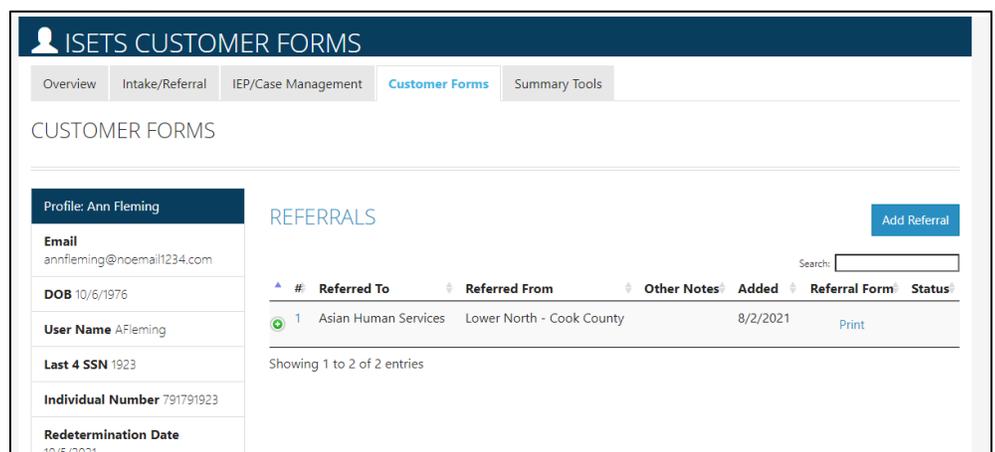
The screenshot shows the 'ISETS INTAKE/REFERRAL' dashboard for a customer named Anna Wackerlin. The profile information includes email (anna@noemail1234.com), DOB (7/10/1979), User Name (AWackerlin), Last 4 SSN (1944), Individual Number (791791944), Redetermination Date (1/19/2022), E&T Provider (Lower North - Cook County), FCRC (Unassigned), and Program Enrollment (N/A). The dashboard features a 'Complete Universal Assessment (UA) & View UA History' section with a table showing 'Needs Assessment Complete' on 8/19/2021 and 'Needs Assessment Date' on 8/19/2021. Below this is a 'SELECT YOUR NEXT STEP' section with buttons for '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'.



The screenshot shows a 'CUSTOMER CONSENT' form. It contains a paragraph of legal text regarding the use of personal information for service coordination. Below the text are input fields for 'Customer Username' and 'Password'. At the bottom, there is a checkbox labeled 'I have read and agree to the terms' and a 'Submit Consent' button.

Customer Forms - Referral

Another location for the referral forms to be found is in the Customer Forms section of the customer profile. The process is the exact same. This is just another option to create/access.



The screenshot shows the 'ISETS CUSTOMER FORMS' dashboard for a customer named Ann Fleming. The profile information includes email (annfleming@noemail1234.com), DOB (10/6/1976), User Name (AFleming), Last 4 SSN (1923), Individual Number (791791923), and Redetermination Date (10/5/2021). The dashboard features a 'REFERRALS' section with a table showing one entry: '# 1', 'Referred To: Asian Human Services', 'Referred From: Lower North - Cook County', 'Added: 8/2/2021', and 'Referral Form: Print'. There is an 'Add Referral' button and a search bar above the table.

Alternate Log-in options

Go to <https://illinoisworknet.com>

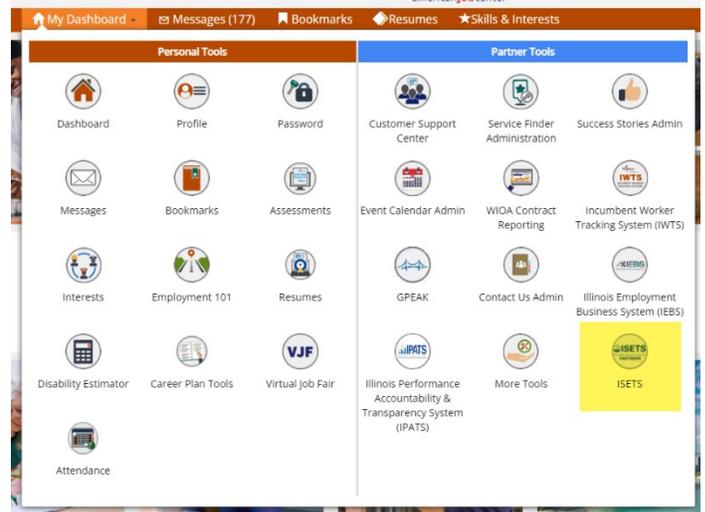
Log-in with username and password

Click dropdown by “My Dashboard”

Click the ISETS Icon on the Partner Tools side of the screen.

Select ISETS group

Follow the instructions on page 2.



Go to <https://www.illinoisworknet.com/isetspartners>

Click ISETS Dashboard and Partner Tools

Log-in with your username and password

Follow the instructions on page 2.

