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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 assigned agencies.
- **IDHS Case Managers** - Will have access to all Provider tools and customers that are associated with their assigned customers.
- **CBO/Other E&T Providers** - Will have access to all Provider tools and customers that are associated with their organization.
- **CBO Program Managers** – Will have access to all Provider tools and customers that are associated with their organization.

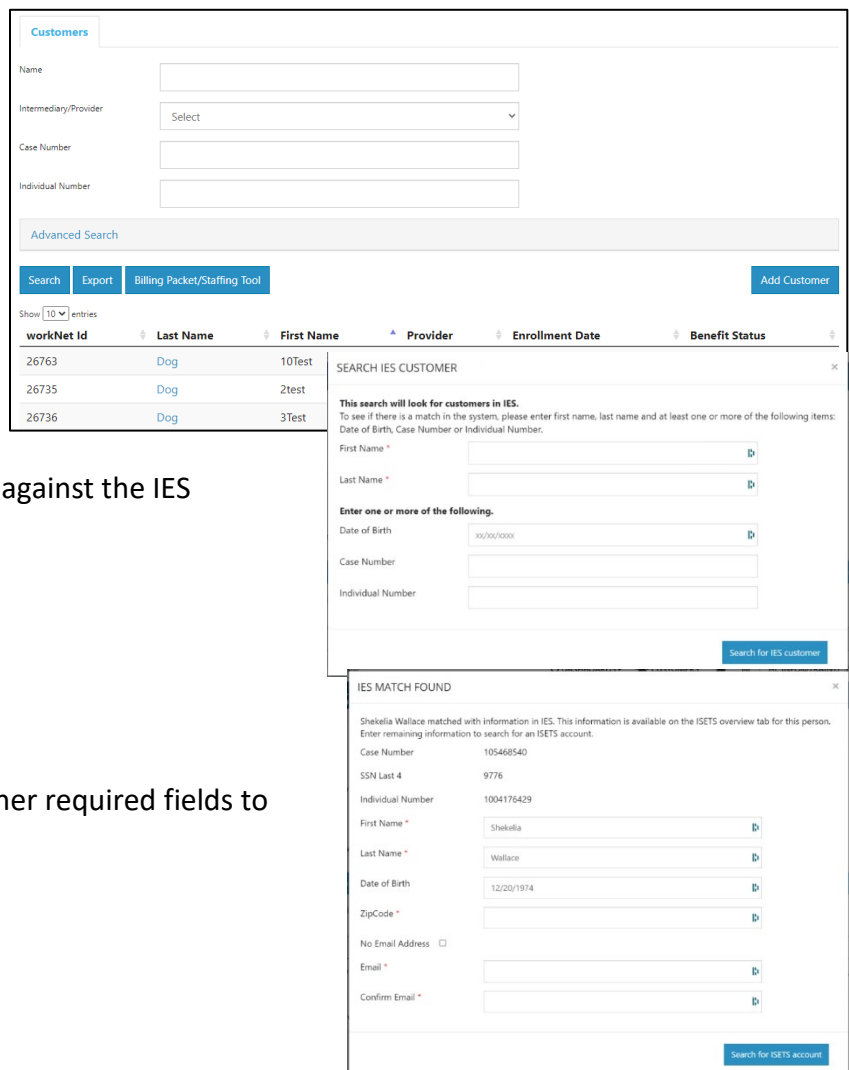
- **Intermediaries** - Will have access to all Provider tools and customers that are associated with their assigned agencies.
- **IDHS Billing Managers** - Will have access to the billing module. They cannot access the customer level profile/data collection tools.

Definitions

- **Referral** – made from IDHS to an agency.
- **Reverse Referral** – made from an agency to IDHS for approval for customer participation.
- **Add Activities / Services** – for any activities/services to be reimbursed, a referral must be approved and accepted.

Adding a New Customer – Provider Staff

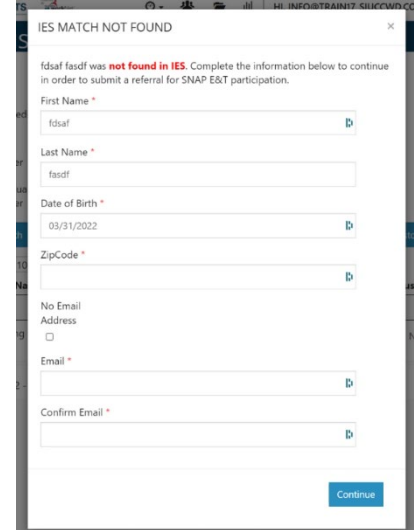
1. Log into <https://apps.illinoisworknet.com/SiteAdministration/IDHSET/Admin> and
2. Click on **ISETS** in the group list.
3. A list will open of existing customers. Click the **Add Customer** button to add a new customer or search for an existing customer from the IES database.
4. Fill in the required 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.



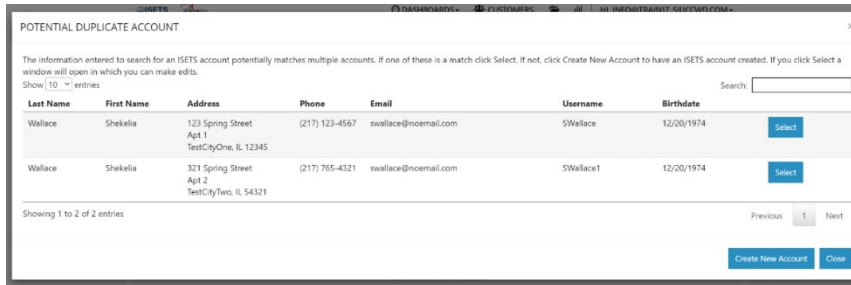
The screenshot shows the 'Customers' management interface. At the top, there are input fields for Name, Intermediary/Provider (a dropdown menu), Case Number, and Individual Number. Below these is an 'Advanced Search' section with buttons for 'Search', 'Export', and 'Billing Packet/Staffing Tool', and an 'Add Customer' button. A table lists existing customers with columns for workNet Id, Last Name, First Name, Provider, Enrollment Date, and Benefit Status. The table contains three entries: (26763, Dog, 10Test), (26735, Dog, 2test), and (26736, Dog, 3Test). A search dialog is open, titled 'SEARCH IES CUSTOMER', with fields for First Name, Last Name, Date of Birth, Case Number, and Individual Number. A 'Search for IES customer' button is at the bottom. A second dialog, 'IES MATCH FOUND', is shown below, displaying details for a match: 'Shekella 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.' The match details include Case Number (105468540), SSN Last 4 (9776), Individual Number (1004178429), First Name (Shekella), Last Name (Wallace), Date of Birth (12/20/1974), and ZipCode. There are also fields for Email and Confirm Email, and a 'Search for ISETS account' button.

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

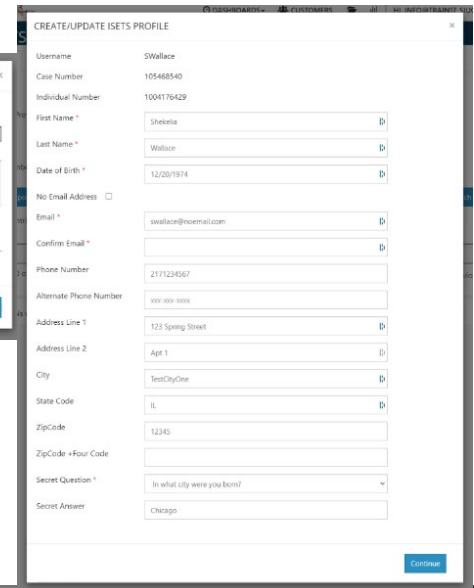
- b. If an IES match **is not found**, make sure the data points entered are correct. To make a correction, “X” out of the window, correct the data, click the button “Search for IES customer”.
- c. If an IES match **is not found** and the data is correct, proceed with entering the other required fields 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 and there are potential duplicate accounts but none of the potential matches are correct, click **Create New Account**. Complete the required information and click **Continue**.



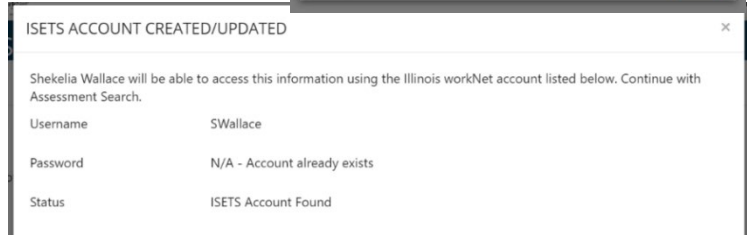
Last Name	First Name	Address	Phone	Email	Username	Birthdate
Wallace	Shekela	123 Spring Street Apt 1 TestCityOne, IL 12345	(217) 123-4567	swallace@noemail.com	SWallace	12/20/1974
Wallace	Shekela	321 Spring Street Apt 2 TestCityTwo, IL 54321	(217) 765-4321	swallace@noemail.com	SWallace1	12/20/1974



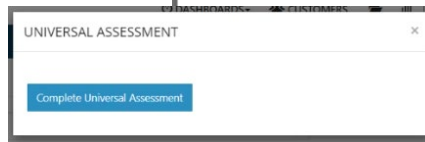
- f. Upon addition of the customer, the next window that shows contains the customer username and password (if it is a new account). *Note: It is a good idea to write down the Username and temporary Password for the customer.*

6. Click the button to **Search for assessment**.

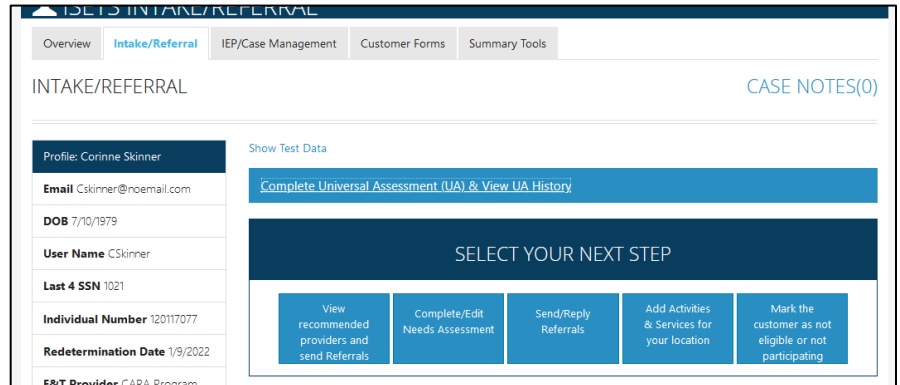
- a. If a SNAP customer is found, **Complete the Universal Assessment – Initial Screening**.
- b. The provider must also complete the universal assessment before clicking **Send a Reverse Referral**.
- c. NOTE: The Universal Assessment and Referrals can also be completed from the Intake page on the customer profile.



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

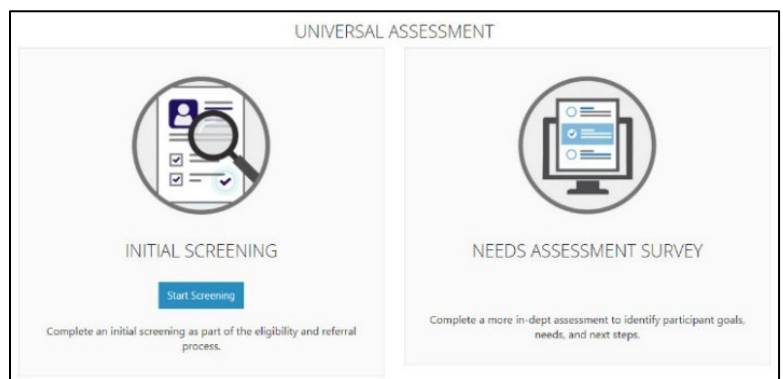



- If a SNAP customer is not eligible in IES, the assessment may be completed. The ineligibility may be temporary. Services cannot be provided until the reverse referral is approved.

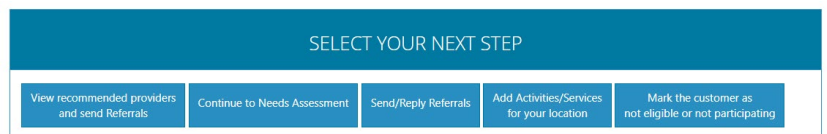


Complete the Universal Assessment (UA) Initial Screening

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

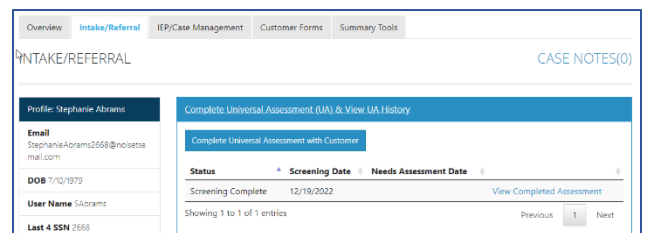


- On the last tab, click **Save and Go To Next Page**.
- Review the information in the Pre-Screening Summary for the customer. Click the section to make edits to that section's information. Save the information before leaving the page.
- Click **Save and Return to Summary** when done.

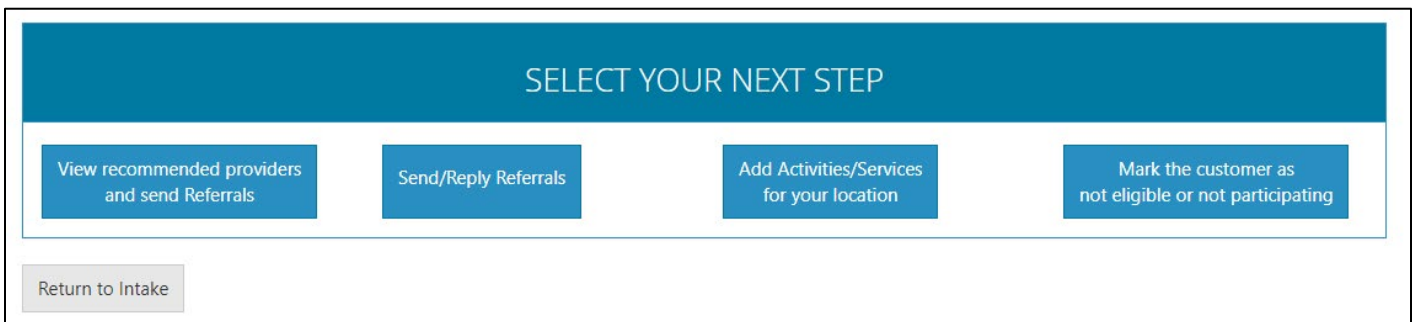
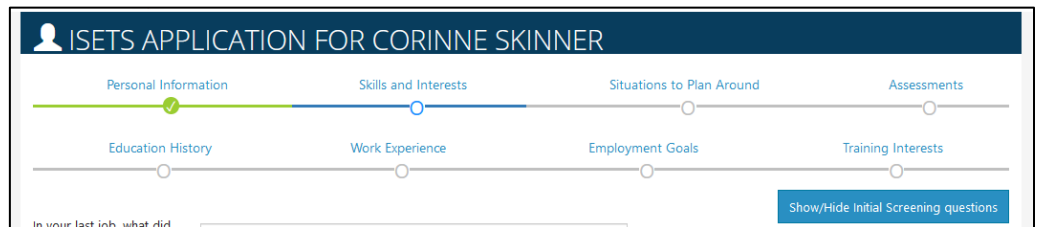
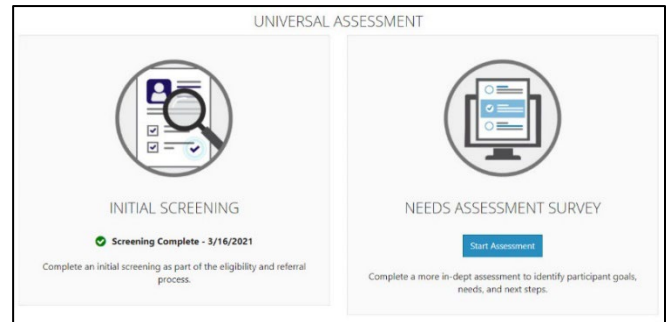


Complete the UA Needs Assessment

- Select **Complete the Universal Assessment – Needs Assessment Survey**.
 - Select **Continue to Needs Assessment** from the Next Steps.



- b. On the **Intake/Referral** tab, select **Complete Universal Assessment** with Customer.
- 8. Select **Start Assessment**.
- 9. If the “Show/Hide Initial Screening questions” is visible, then the section was completed on the initial part of the assessment. 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 **Save and Go to Next Page**.
- 11. Review the information in the Pre-Screening Summary with the customer. Click any of the sections to make edits to that section’s information.
- 12. Click **Save and Return to Summary** when done.
- 13. At the bottom of the summary select your next step.



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

Send Reverse Referral to FCRC

1. From Select Your Next Step, click on **Send/Reply Referrals**
2. Click **Add Referral**.
3. The Referral form modal opens. Select the type of referral to complete: Provider or **IDHS (Reverse Referral)**.
4. From the dropdown, select the FCRC location assigned to the customer (if known.) The locations are sorted by distance from the customer’s address.
5. Complete the **Customer Consent** form:
 - a. **Option 1:** upload a signed consent form. Include description of document.
 - b. **Option 2:** enter the customer username and customer password. (Username appears on the modal. New account password is Lastname and six-digit date of birth i.e. Smith123456.) *If the customer had an existing account, the password may be reset from the left-hand menu on the customer profile.* Check the box after the customer reads and agrees to the terms.
 - c. Then click **Submit Consent**.
6. Select a **Customer Status**, enter the appropriate dates.
7. Select **Refer From** agency. Some partners may have access to more than one agency.
8. Select **Service Needed**. Based upon the agency’s contract with IDHS.
9. Add any additional notes.
10. Click **Submit**.
11. If the customer would like a printed copy of the referral: Open the Referrals header on the Overview tab. Select **Print** in the referral form column. A pdf document should open on the agency computer to print the referral form for the customer.

Referral will show pending in the list until DHS approves the referral.

To see the history of the referral, click the Green “+” sign next to the referral. To close, click the Red “-”.

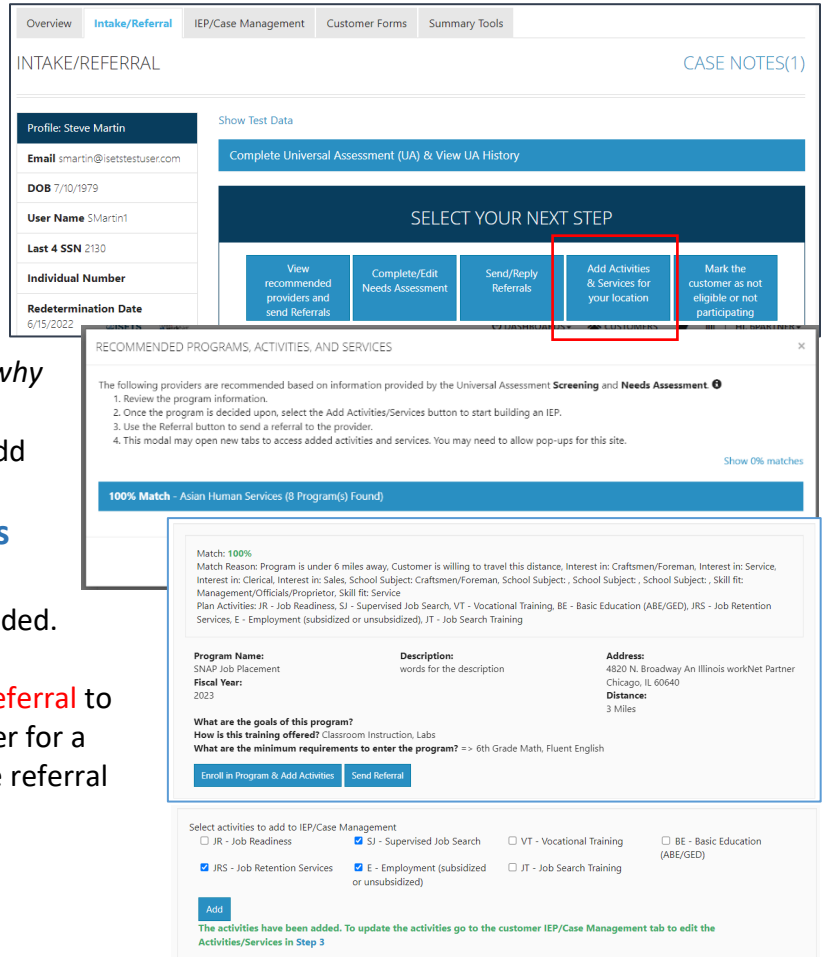
Note: for an agency to provide any services a reverse referral must be approved by DHS or costs associated with services you provide prior to approval may be disallowed.

Referrals								
#	Referred To	Referred From	Date Submitted	Referral Form	Response	Responded By	Response Date	SNAP/E&T Eligible
1	Northside - Cook County	Asian Human Services	12/23/2022	Print	Pending	Not Yet Marked	Not Yet Marked	⚠ Pending Application
1.1	Northside - Cook County	Asian Human Services	12/23/2022	Print	Pending	Not Yet Marked	Not Yet Marked	⚠ Pending Application

Showing 1 to 2 of 2 entries

Add Activities & Services for your location

1. Select **Add Activities & Services for your location** from the Intake/Referral tab.
2. Suggested program matches 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. *Click the 0% matches to see other possibilities and why they were not a match.*
3. Click **Enroll in Program and Add Activities** to add an activity to the customer's IEP/Case Management. **This is how the customer is enrolled.**
4. Click activity boxes for the services to be provided.
5. Select **Add** to add to the customer's IEP.
6. If a referral was not already sent, click **Send Referral** to open the screen to send a referral to a provider for a service you do not provide. Follow the reverse referral steps above.



The screenshot displays the 'Intake/Referral' interface. At the top, there are navigation tabs: Overview, Intake/Referral (selected), IEP/Case Management, Customer Forms, and Summary Tools. Below the tabs, the page title is 'INTAKE/REFERRAL' with a 'CASE NOTES(1)' link on the right. A profile card for 'Steve Martin' is shown on the left, including fields for Email, DOB, User Name, Last 4 SSN, Individual Number, and Redetermination Date. To the right of the profile is a 'Show Test Data' link and a 'Complete Universal Assessment (UA) & View UA History' button. Below this is a 'SELECT YOUR NEXT STEP' section with five buttons: 'View recommended providers and send Referrals', 'Complete/Edit Needs Assessment', 'Send/Reply Referrals', 'Add Activities & Services for your location' (highlighted with a red box), and 'Mark the customer as not eligible or not participating'. Below the navigation buttons is a 'RECOMMENDED PROGRAMS, ACTIVITIES, AND SERVICES' section. It contains instructions for providers and a 'Show 0% matches' link. A blue bar indicates a '100% Match - Asian Human Services (8 Program(s) Found)'. A detailed view of a match is shown below, including 'Match: 100%', 'Match Reason', 'Program Name', 'Fiscal Year', 'Description', 'Address', and 'Distance'. At the bottom, there are checkboxes for selecting activities to add to the IEP/Case Management, with 'Add' and 'Send Referral' buttons.

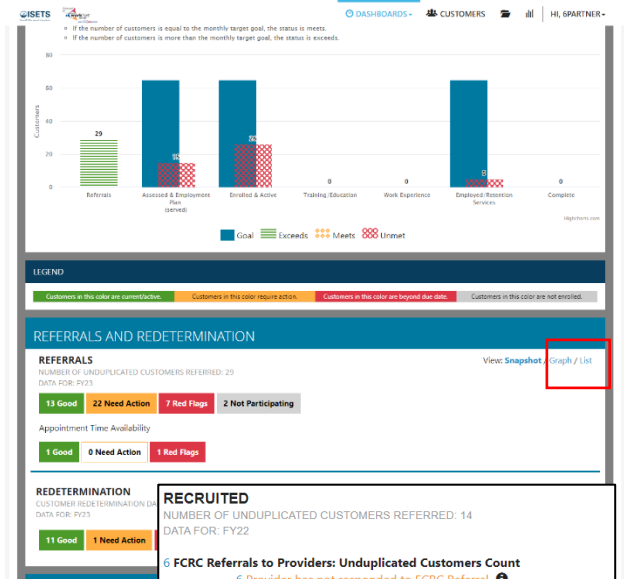
Approve / Reject Referrals

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: *DHS Referrals to Providers: Unduplicated Customers Count*

3. Click the **number** next to *Provider has not responded to DHS Referral* OR *Provider has not responded within 48 hours of Orientation Date*. This will yield a list of customer names.

4. Click the **customer last name** to open the customer profile.

5. Click the **Referrals** header on the overview page.
6. Click the **Plus** icon by the referral from IDHS.
7. Click the **1.1** to respond to the referral



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

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

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

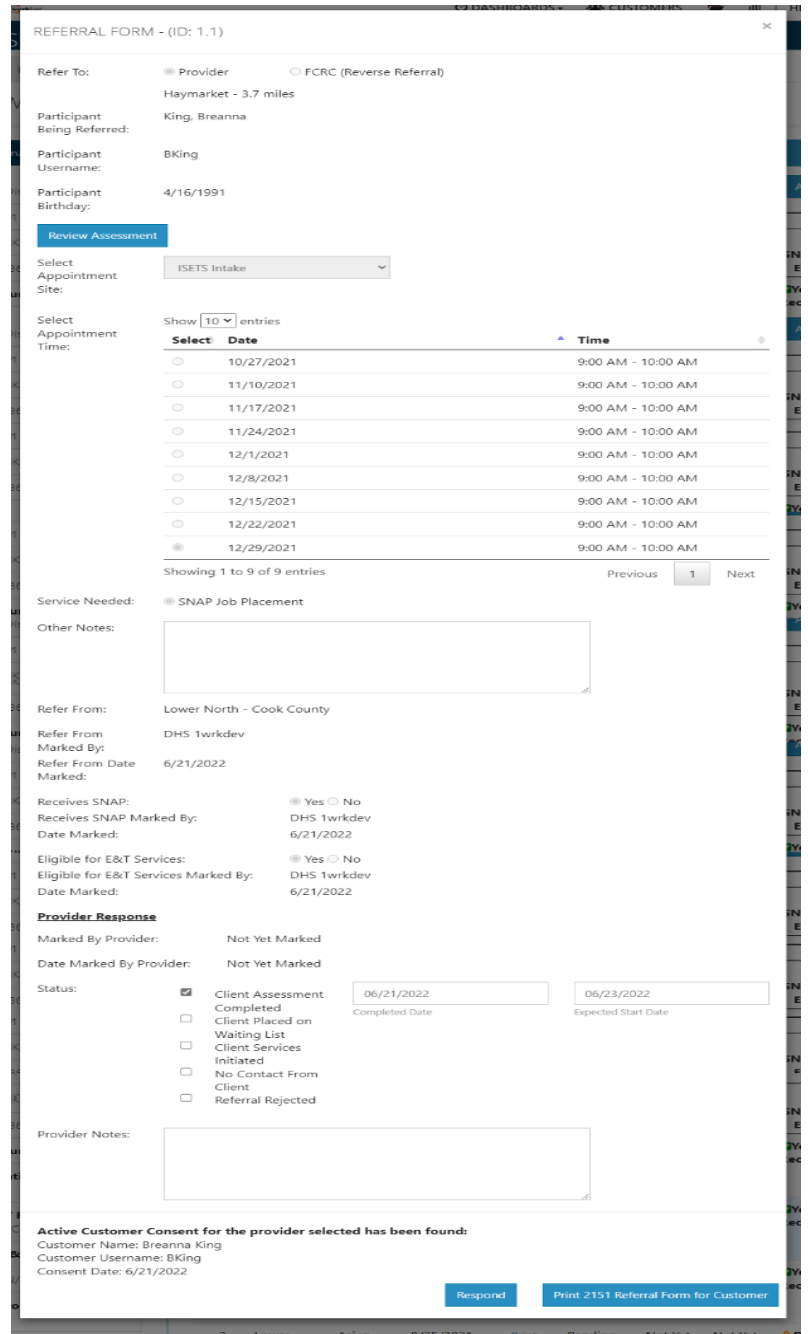
#	Referred To	Referred From	Date Submitted	Referral Form	Response	Responded By	Response Date	SNAP/E&T Eligible
1	Asian Human Services	DuPage County	11/22/2022	Print		Not Yet Marked	Not Yet Marked	Yes
1.1	Asian Human Services	DuPage County	11/22/2022	Print		Not Yet Marked	Not Yet Marked	Yes
2	Haymarket	North	9/7/2022	Print	N/A	Not Yet	Not Yet	Yes

8. Scroll to the Provider Response section to update the Status.
9. Enter the appropriate dates of when an action was taken.
10. Click **Respond**

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.



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 Assessment

Select Appointment Site: ISETS Intake

Select Appointment Time: Show 10 entries

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 1 Next

Service Needed: SNAP Job Placement

Other Notes:

Refer From: Lower North - Cook County

Refer From Marked By: DHS 1wrkdev

Refer From Date Marked: 6/21/2022

Receives SNAP: Yes No
Receives SNAP Marked By: DHS 1wrkdev
Date Marked: 6/21/2022

Eligible for E&T Services: Yes No
Eligible for E&T Services Marked By: DHS 1wrkdev
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

Completed Date: 06/21/2022 Expected Start Date: 06/23/2022

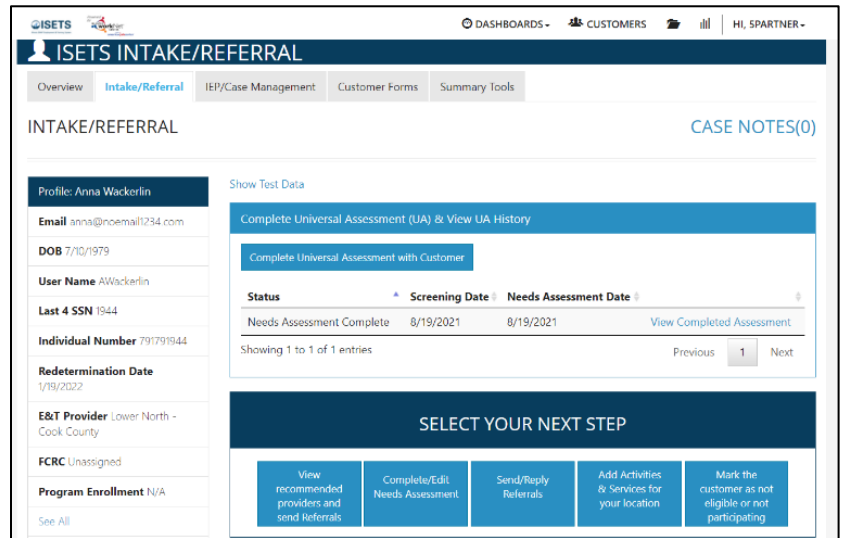
Provider Notes:

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

Respond **Print 2151 Referral Form for Customer**

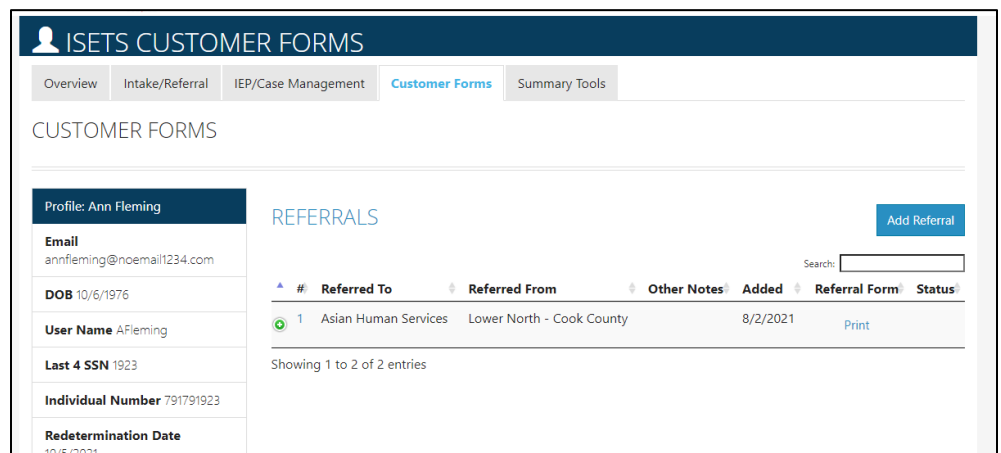
Send Referral to an Other Provider

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 **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. OR by uploading a signed consent document. Check the box after the customer reads and agrees to the terms. Then click **Submit Consent**.
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**.
10. **Print** the referral form for the customer.



Customer Forms - Referral

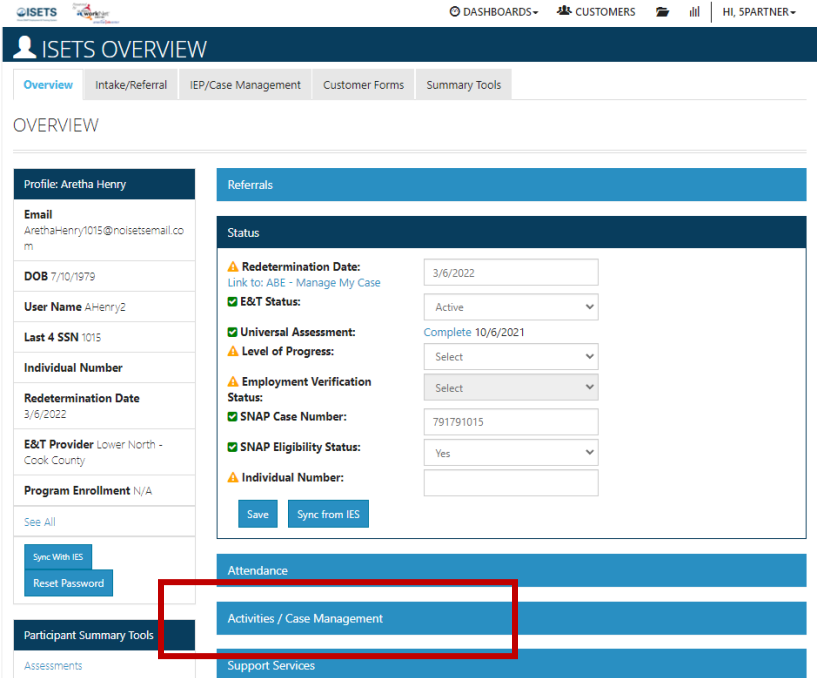
Another location for the referral forms to be found is in the Customer Forms section of the customer profile. The process is the exact same. This is just another option to create/access.



Add Activity/Service

After sending or accepting referrals for participants, services will need to be added to the IEP/Case Management. **Enrollment is completed by adding a minimum of one service from the Intake/Referral section.** Services are associated with the contract in place for the Service Provider. After the customer is enrolled, services may be added from:

- the Overview tab > Activities / Case Management (see below)
- the Intake/Referral tab > Add Activities & Services for your location (see below) **This is how the customer may be enrolled in your program.**
- the IEP/Case Management tab (see the IEP Case Management document)



ISETS OVERVIEW

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

OVERVIEW

Profile: Aretha Henry

Email: Aretha-Henry1015@inohsetsemail.com

DOB: 7/10/1979

User Name: AHenry2

Last 4 SSN: 1015

Individual Number:

Redetermination Date: 3/6/2022

E&T Provider: Lower North - Cook County

Program Enrollment: N/A

Referrals

Status

Redetermination Date: 3/6/2022
Link to: ABE - Manage My Case

E&T Status: Active

Universal Assessment: Complete 10/6/2021

Level of Progress: Select

Employment Verification Status: Select

SNAP Case Number: 791791015

SNAP Eligibility Status: Yes

Individual Number:

Save | Sync from IES

Sync With IES | Reset Password

Participant Summary Tools

Assessments

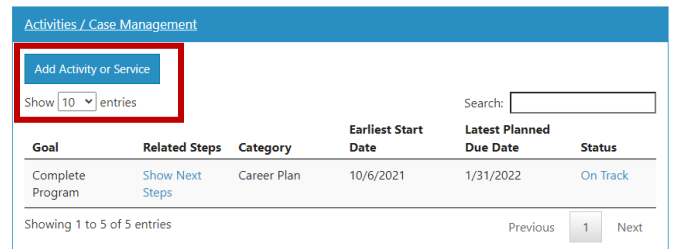
Attendance

Activities / Case Management

Support Services

Overview tab > IEP / Case Management

When selecting this option, the user is taken to the Intake/Referral tab to Select a next step. Select Add Activities & Services for your location. Follow the directions below.



Activities / Case Management

Add Activity or Service

Show 10 entries

Search:

Goal	Related Steps	Category	Earliest Start Date	Latest Planned Due Date	Status
Complete Program	Show Next Steps	Career Plan	10/6/2021	1/31/2022	On Track

Showing 1 to 5 of 5 entries

Previous 1 Next

Add Activities & Services for your location

1. On the Intake Referral Page > Click to add a service or activity to the customer's IEP/Case Management.
2. Click the name of the provider for which you want to add services.



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

Click a Provider to view services offered.

100% Match - Friendly Provider (1 Program(s) Found)

100% Match - Test provider 123 (1 Program(s) Found)

60% Match - Frankfort Township (2 Program(s) Found)

60% Match - Mt. Vernon Township (2 Program(s) Found)

60% Match - Six Mile Township (2 Program(s) Found)

50% Match - Free Lunch Academy (1 Program(s) Found)

3. Click **Enroll in Program & Add Activities**. If you are making a referral to another provider, complete the referral process above.
4. Check the boxes of the services to add to the client profile and click **Add**. **This is how the customer is enrolled in your program.**
5. The services will be added to the customer’s IEP/Case Management and can be managed from that location. Move immediately to the IEP or click **Close** to add more referrals.

Other directions are available for managing the IEP/Case Management.

100% Match - Asian Human Services (1 Program(s) Found)

Asian Human Services - 4820 N. Broadway ISETS
Chicago IL 60640

Match: 100%
 Match Reason: Program is under 6 miles away, Customer is willing to travel this distance,
 Interest in: Craftsmen/Foreman, School Subject: Clerical, Skill fit:
 Management/Officials/Proprietor, Skill fit: Farm/Other Labor
 Plan Activities: WE - Work Experience, JR - Job Readiness, SJ - Supervised Job Search, VT -
 Vocational Training, BE - Basic Education (ABE/GED/Bridge)

Program Name: SNAP Job Placement - Test Program Name 7	Description: adding a program with SOC code to be able to test it. 	Address: 4820 N. Broadway An Illinois workNet Partner Chicago, IL 60640 Distance: 3 Miles
---	---	--

What are the goals of this program?
How is this training offered?
What are the minimum requirements to enter the program? => 6th Grade Math, => 6th
 Grade Reading

Enroll in Program & Add Activities
Send Referral

Enroll in Program & Add Activities
Send Referral

Select activities to add to IEP/Case Management

<input checked="" type="checkbox"/> WE - Work Experience	<input checked="" type="checkbox"/> JR - Job Readiness	<input checked="" type="checkbox"/> SJ - Supervised Job Search	<input checked="" type="checkbox"/> VT - Vocational Training
<input type="checkbox"/> BE - Basic Education (ABE/GED/Bridge)			

The activities have been added. To update the activities go to the customer IEP/Case Management tab to edit the Activities/Services in Step 3

Alternate Options to Access ISETS

Go to <https://illinoisworknet.com>

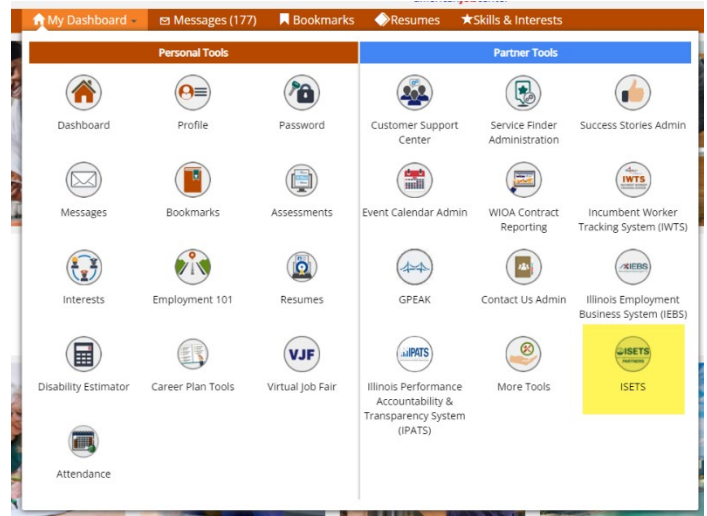
Log-in with username and password

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.

