Contents

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.

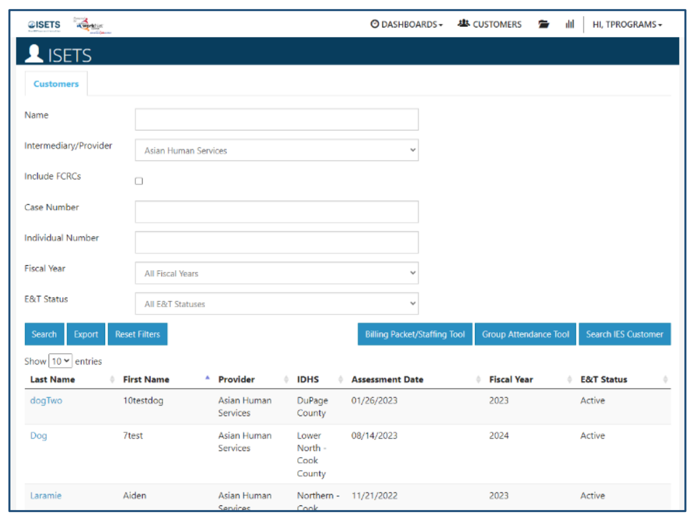
- **CBO/Other E&T Providers** - Will have access to all Provider tools and customers that are associated with their organization.
- **CBO Program Managers –** Will have access to all Provider tools and customers that are associated with their organization.
- **Intermediaries -** Will have access to all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

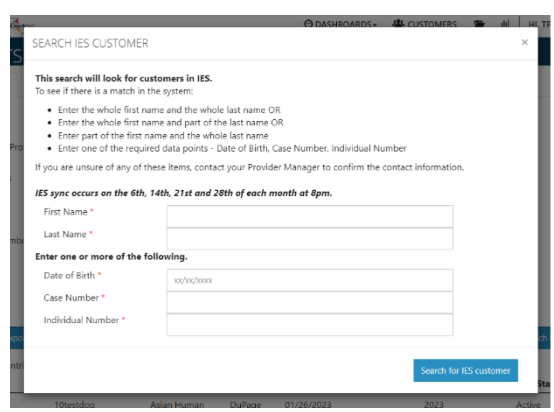
- **Referral** – made from IDHS to an agency.
- **Reverse Referral** – made from an agency to IDHS for approval for customer participation.
- **Add Activities / Services** – for any activities/services to be reimbursed, a referral must be approved and accepted.

Adding a New Customer – Provider Staff

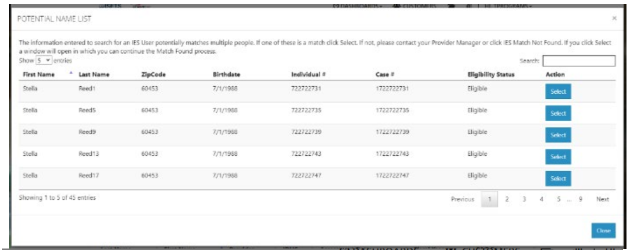
1. Log into https://apps.illinoisworknet.com/SiteAdministration/IDHSET/Admin and
2. Click on ISETS in the group list.
3. A list will be opened of existing customers. Click the Search IES Customer button to search for an existing customer from the IES database or add a new customer.

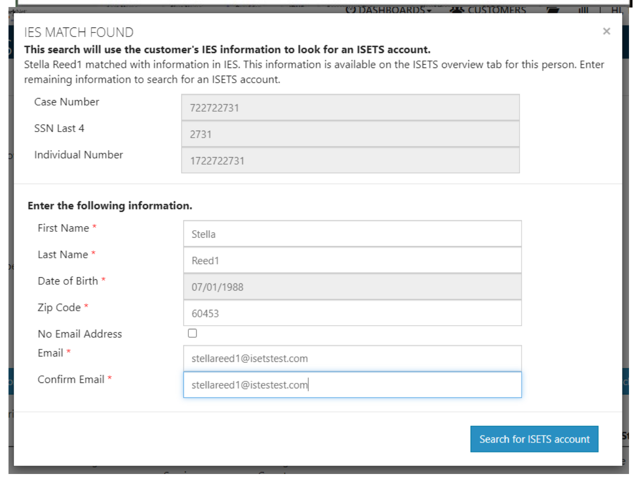


4. Fill in the required information.
    a. Enter the name.
        i. Whole first name and whole last name
        ii. Partial first name and whole last name
        iii. Whole first name and partial last name
        iv. When using a partial name select the match from the list. **If there is not a match, contact the provider manager to find out the proper spelling or associated data points.**
    b. Include at least one of the numbers:
        i. Social Security number
        ii. Case Number
        iii. Individual Number
    c. Click Search for existing customer.

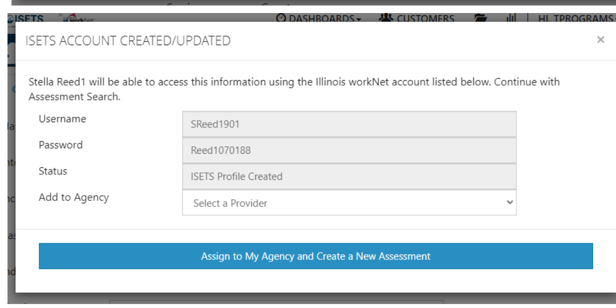


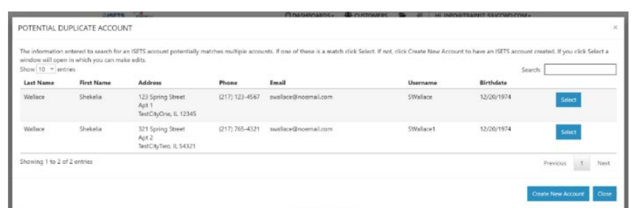
5. ISETS will search for an existing customer against the IES database.
    a. If an IES match IS found, enter the other required fields to search for an ISETS account.



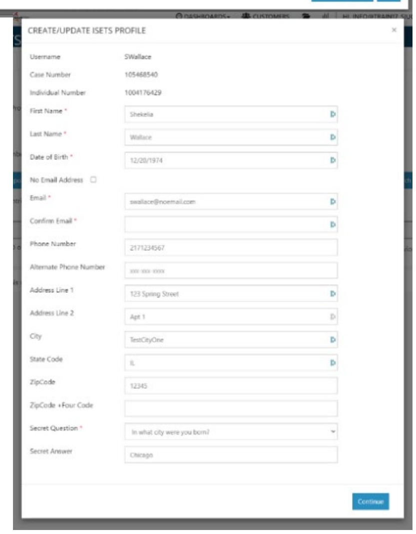


b. If the ISETS account is created, assign the customer to an agency and complete the initial assessment.

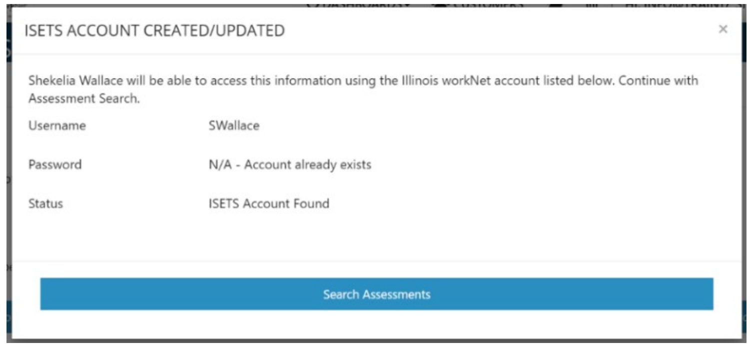




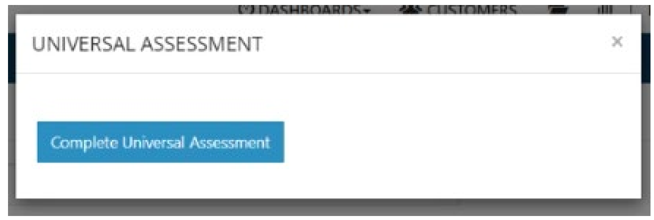
c. If ISETS match is found but there are potential duplicate accounts, determine if any of the potential accounts are a match, click the Select button. Make any updates in the fields, click Continue button. If ISETS match is found and there are potential duplicate accounts but none of the potential matches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



d. 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. At minimum, this must be done before sending a Reverse Referral.
   b. The provider should 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.

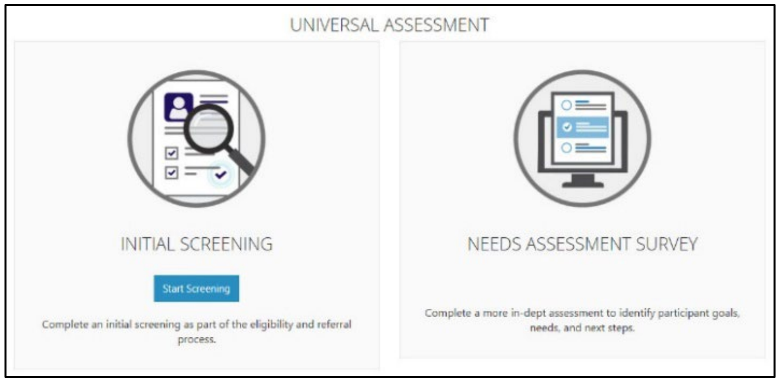


IES Match Not Found

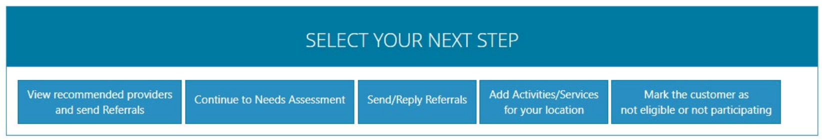
Contact the provider manager for your agency. The provider manager can check IES to ascertain whether a potential customer has an active SNAP case and can enter the customer into the system and assign the customer to an agency. The partner can then complete the Initial Screening.

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.

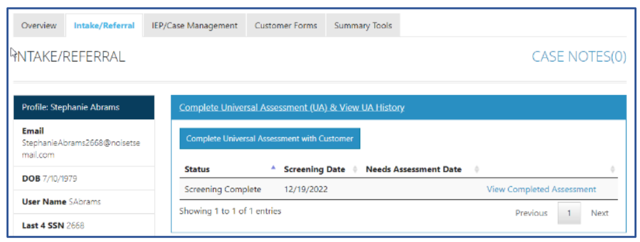


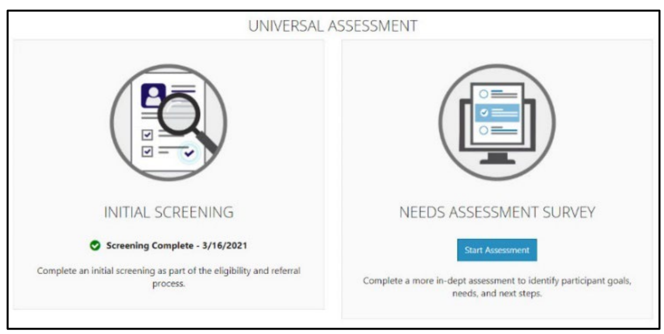
4. On the last tab, click Save and Go To Next Page.
5. Review the information in the Pre-Screening Summary for the customer. Click the section to make edits to that section's information. Save the information before leaving the page.
6. Click Save and Return to Summary when done.



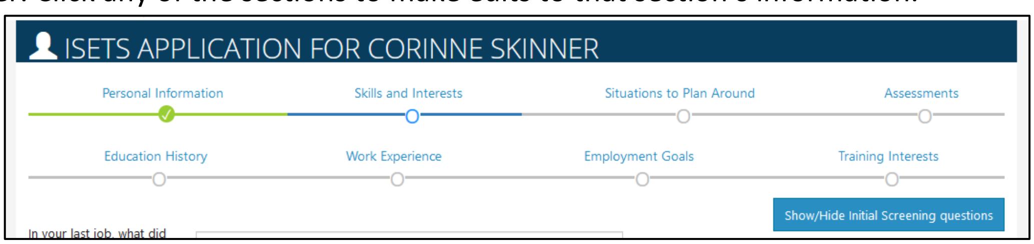
Complete the UA Needs Assessment

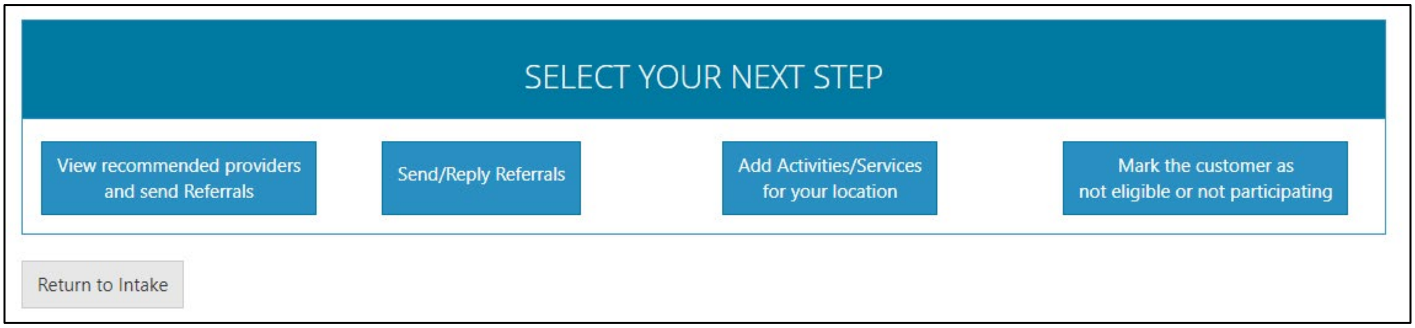
7. Select Complete the Universal Assessment – Needs Assessment Survey.
   a. Select *Continue to Needs Assessment* from the Next Steps.
   b. On the Intake/Referral tab, select Complete Universal Assessment with Customer.
8. Select Start Assessment.
9. If the "Show/Hide Initial Screening questions" is 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.

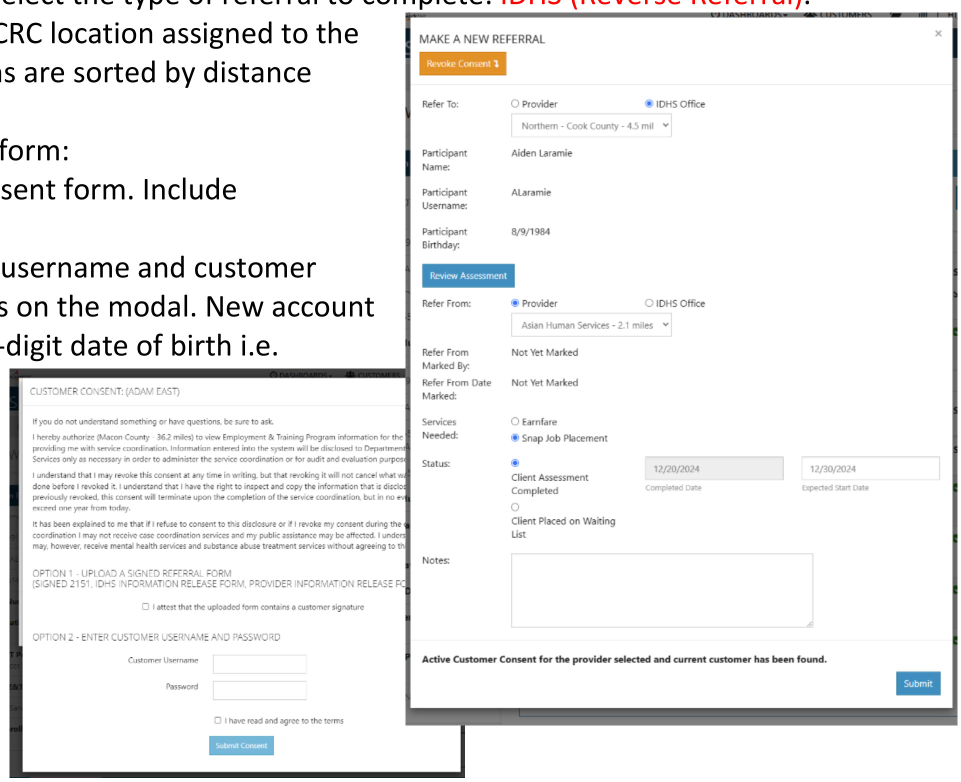




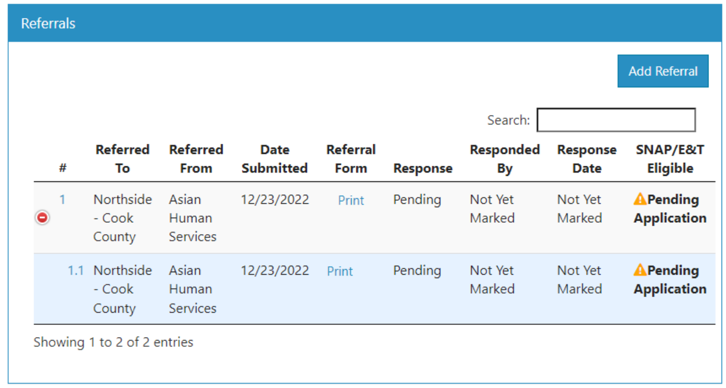
Note: for an agency to provide any services a reverse referral must be approved by an E&T representative and the customer enrolled with an active SNAP E&T activity or costs associated with services provided prior to approval may be disallowed.

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: 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. 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.



The Revoke Consent button is for any customer who already has consent with an office or agency already in the system. When marking this button, the action is immediate and cannot be undone. New consent forms would need to be completed.



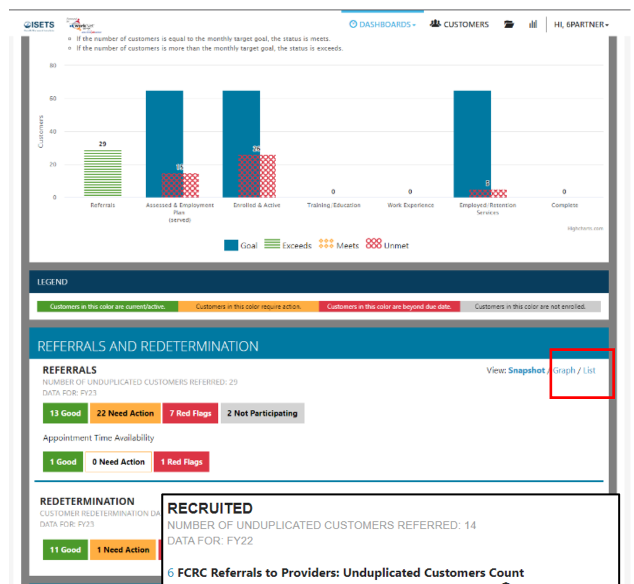
Referral will show pending in the list until DHS approves the referral.

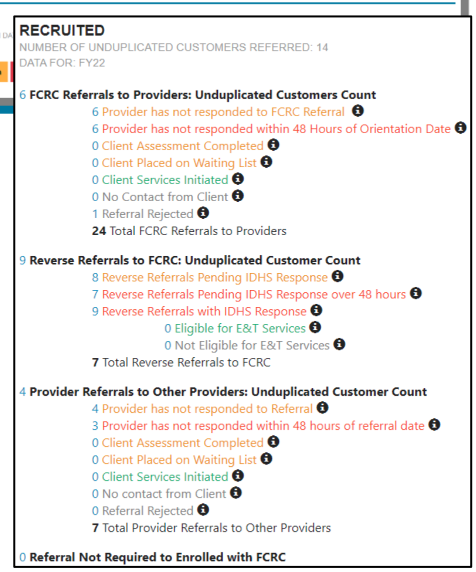
To see the history of the referral, click the Green "+" sign next to the referral. To close, click the Red "-".

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.

Approve / Reject Referrals

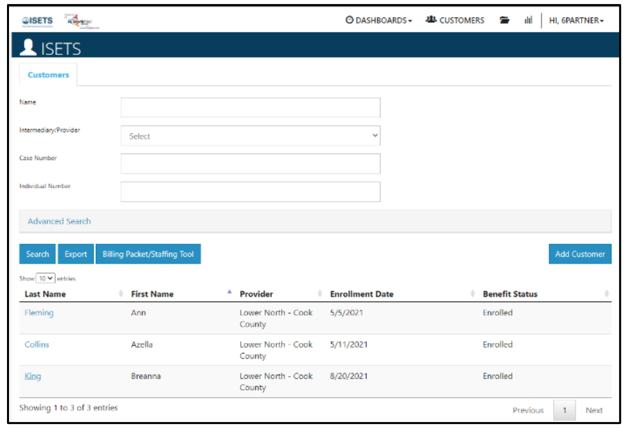
1. View the referrals to your location. From the ISETS Dashboard, click on the Referrals and Redetermination section of the dashboard.
2. Click the list view. Find the section: *DHS Referrals to Providers: Unduplicated Customers Count*



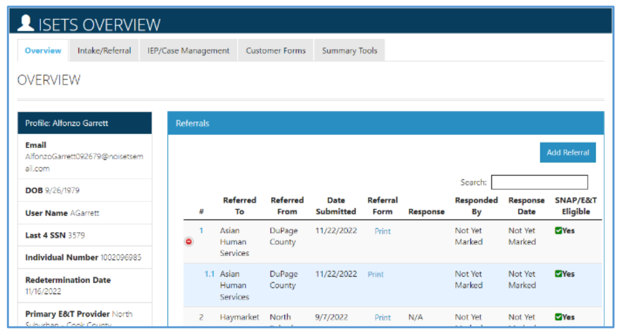


3. Click the number next to *Provider has not responded to IDHS Referral* OR *Provider has not responded to IDHS Referral within 10 Business Days*. This will yield a list of customer names.

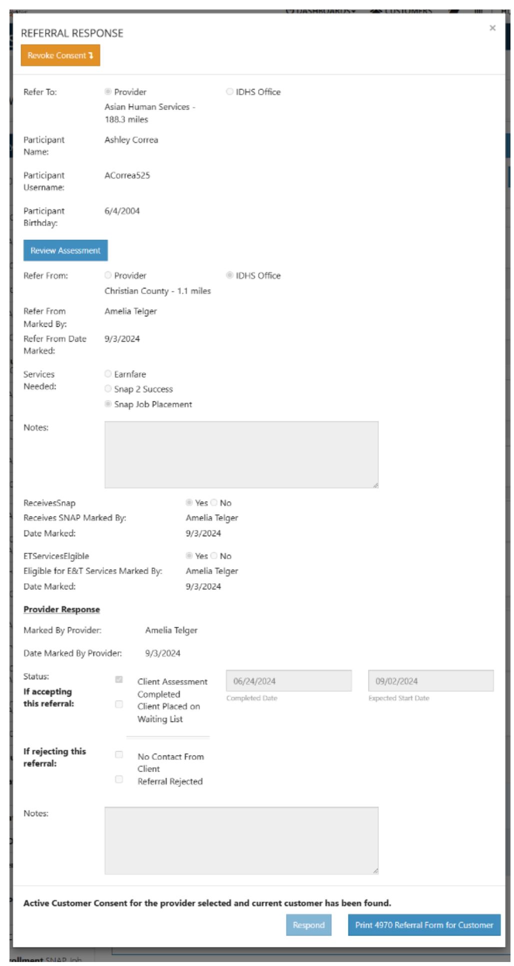
4. Click the customer last name to open the customer profile.



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



8. Scroll to the Provider Response section to update the Status.
   a. Client Assessment completed – auto filled with the date the initial assessment was finished.
   b. Client Placed on Waiting List – do not enter an expected start date if customer is to be placed on a waiting list.
   c. No Contact from Client – partner reached out and can document lack of contact – this rejects the feralal
   d. Referral Rejected – this is for a reason other than no contact and a note should be added on the referral.
   e. No Contact and Referral Rejected return to Workforce Development for follow-up with another agency if one is close.
9. Enter the appropriate dates of when an action was taken.
10. Click Respond

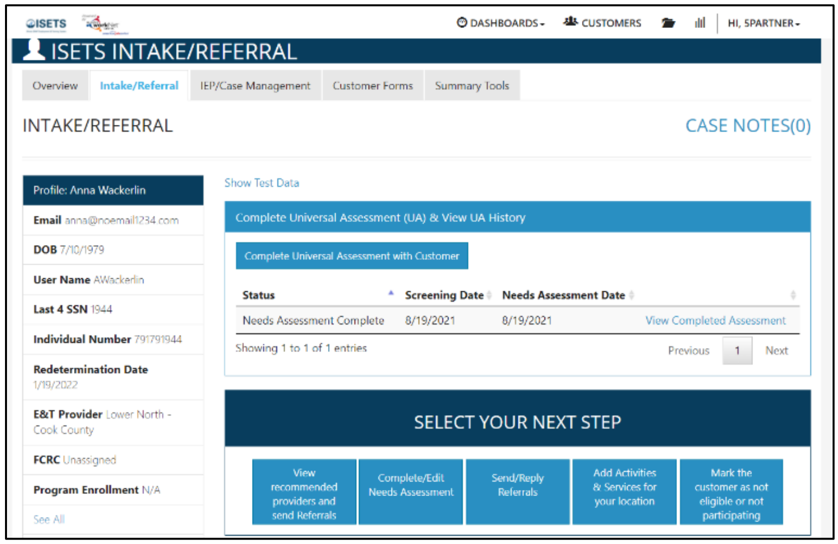


Clients Placed on Waiting List

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.

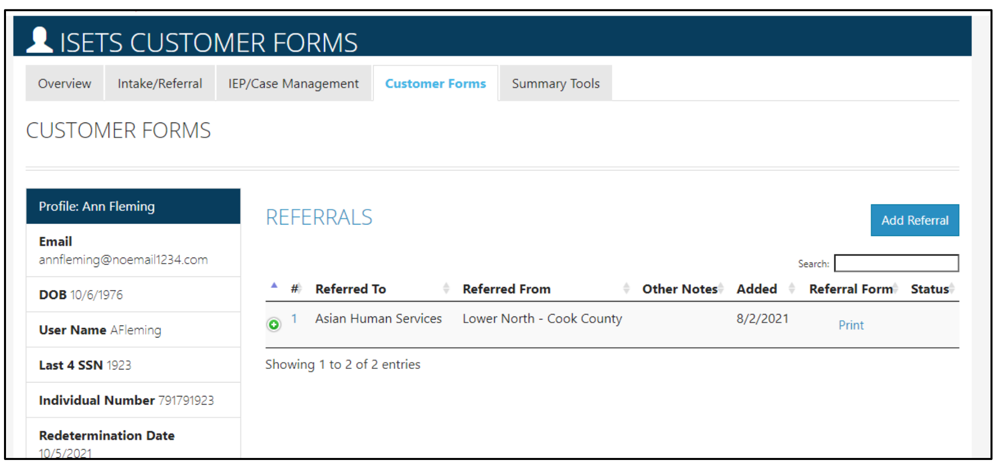
Send Referral to an Other Provider



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.

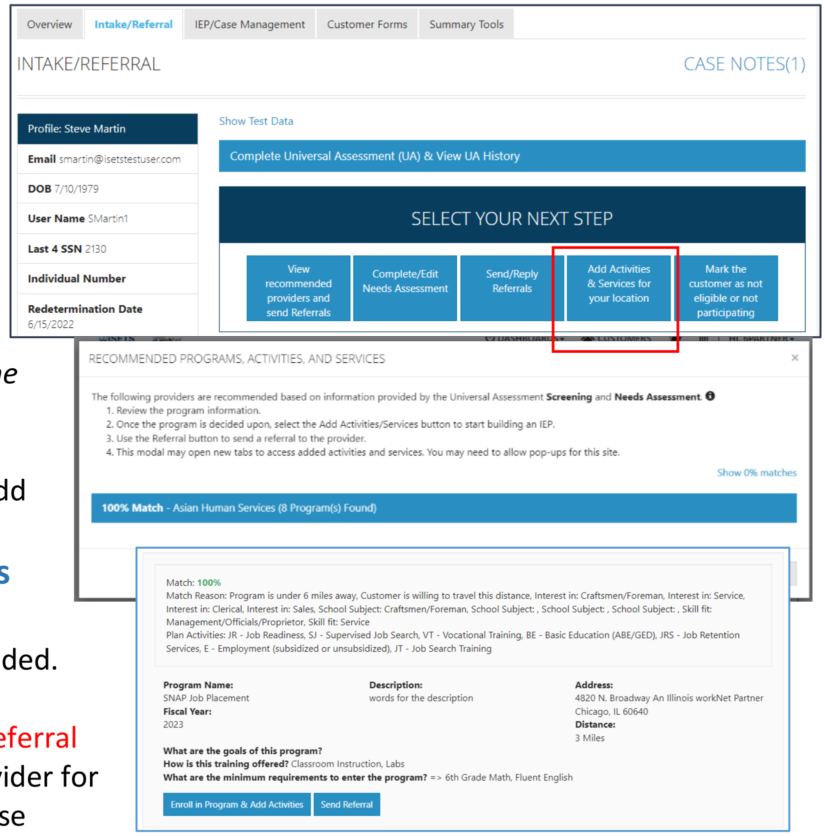


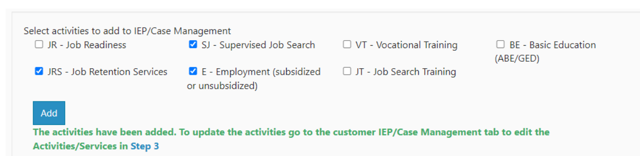
Add Activities/Services

After sending or accepting referrals for participants, the referral is approved, enroll the customer by following these steps. ***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.

Add Activities & Services for your location

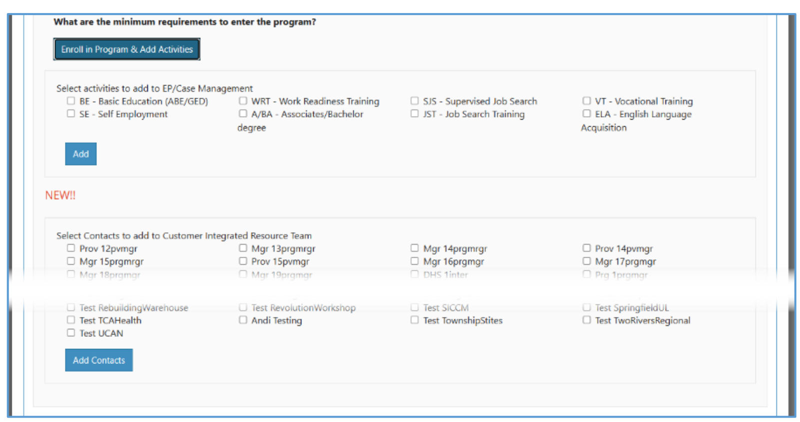
1. Upon referral approval - Select Add Activities & Services for your location from the Intake/Referral tab.
2. Suggested program matches will open in a list with the percentage of match noted. 100% matches will be at the top of the list for any organization that matches with the participant. Click the 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.





Add Integrated Resource Team Partners

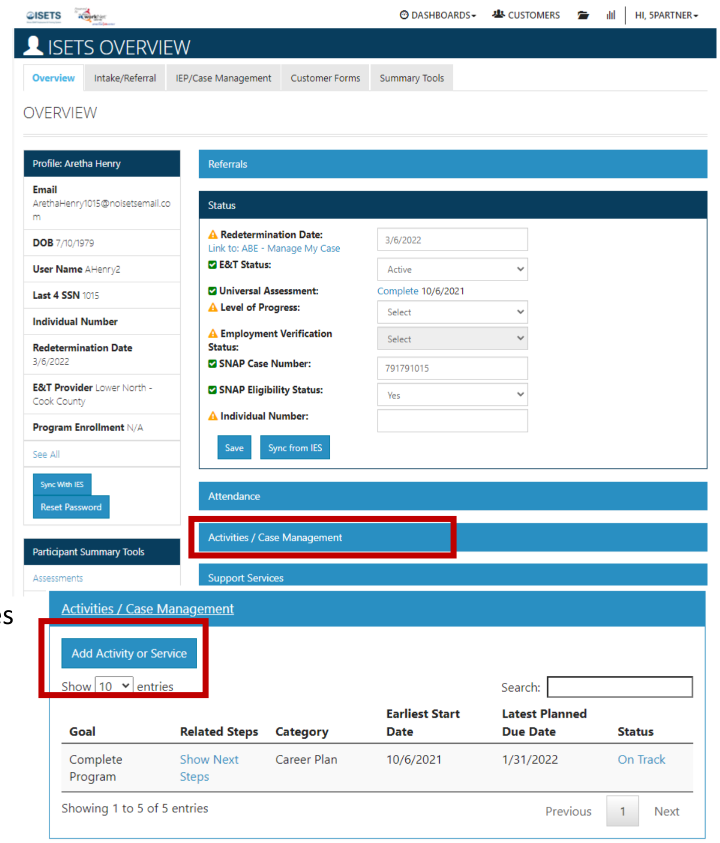
Immediately following the program enrollment is a section to add Contacts to the Customer's Integrated Resource Team Members. Add any partner that may need to be included on communications about the participant.



After Enrollment

After the customer is enrolled, activities and 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 EP/Case Management tab (see the IEP Case Management document)

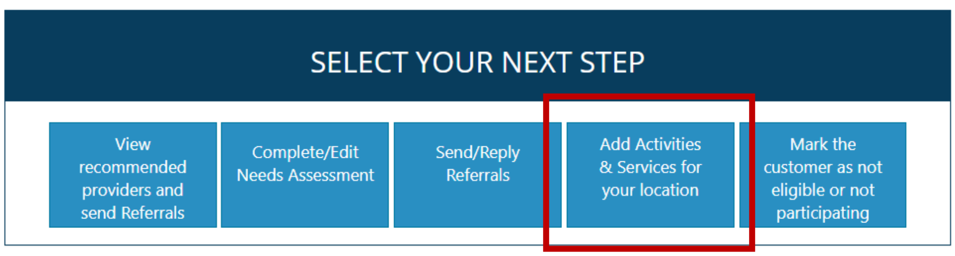


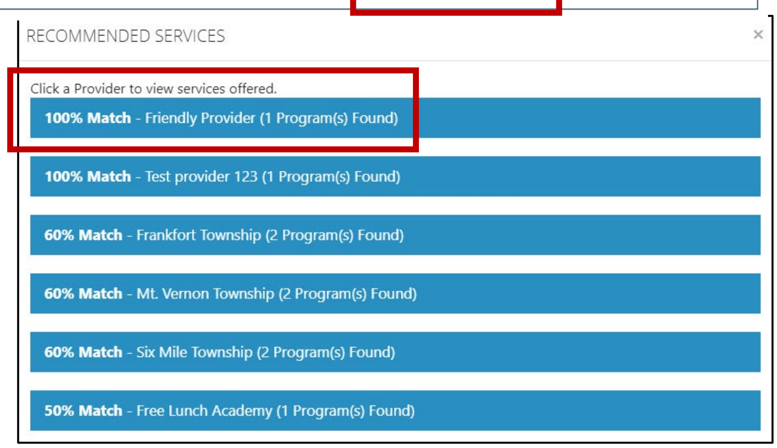
Overview tab > IEP / Case Management

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.

Add Activities & Services for your location

1. On the Intake Referral Page > Click to add a service or activity to the customer's EP/Case Management.
2. Click the name of the provider for which you want to add services.
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 EP/Case Management and can be managed from that location. Move immediately to the EP or click Close to add more referrals.





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

https://www.illinoisworknet.com/DownloadPrint/EP-Career%20Plan%20Instructions.pdf

Alternate Options to Access ISETS

Go to https://illinoisworknet.com

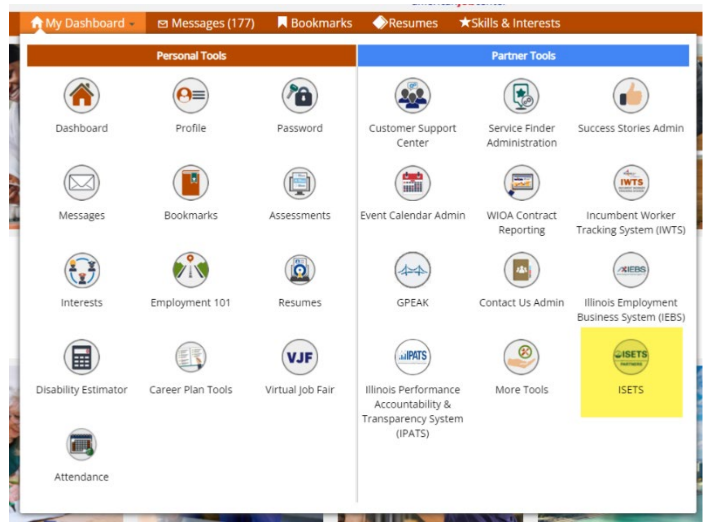
Log-in with username and password

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.