IDHS
ILLINOIS DEPARTMENT OF HUMAN SERVICES

ISETS

Illinois SNAP Employment & Training System

User Manual

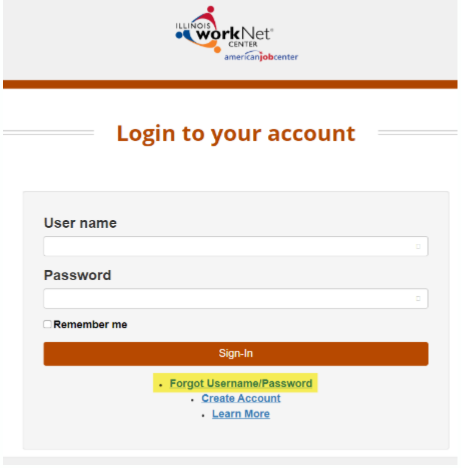
For State SNAP E&T Providers

Table of Contents

*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. If you have been logged out, enter your Illinois WorkNet/ISETS password and return to ISETS.

> **Best Practice**
>
> **Close tabs when you are not using them so you don't time out and have to log back in.**

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

Accessing ISETS Tools

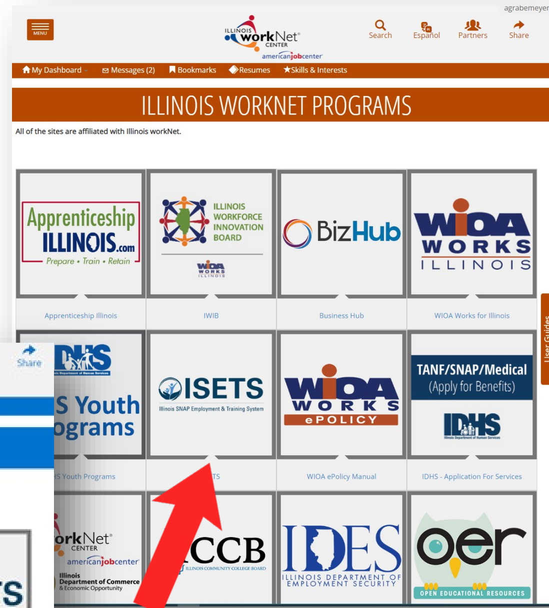
Once you are logged in, you can access the ISETS Dashboard and partner tools.

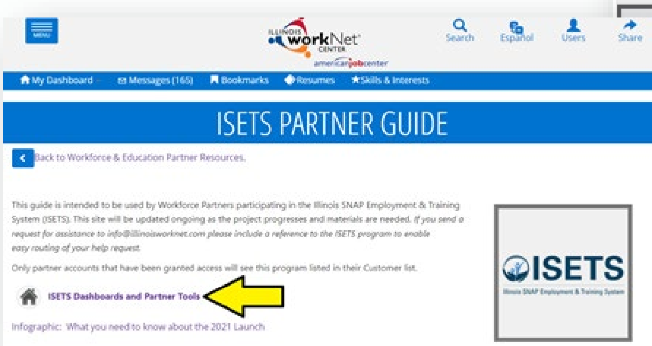
Option 1 – Use the direct link. If you use this option, you may want to bookmark the link. https://apps.illinoisworknet.com/SiteAdministration/IDHSET/Admin/Index/

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 the link that is listed on the ISETS Partner Page: (https://www.illinoisworknet.com/isetspartners)





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 annually. 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. Keep Attestations at your agency; there is no need to send copies to IDHS.
3. Each ISETS user must complete a Confidentiality Agreement found at IES Access and Support Center for External Partners. Keep these at your agency also; there is no need to send copies to IDHS.
4. Submit an initial user list to DHS.ISETS.Access@illinois.gov saved as a Microsoft excel file with your organization's name in place of "Organization Name" in the file name. If your organization has 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 to ISETS. You will receive a system generated notification once you 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]

7. If you don't access ISETS for 30 days, your account will require a password reset.

Please remember that if you fail to notify IDHS of a user who is no longer employed with your organization, this could constitute a breach of your Data Sharing Agreement. If a user needs to be removed from ISETS please send a direct email to DHS.ISETS.Access@Illinois.gov

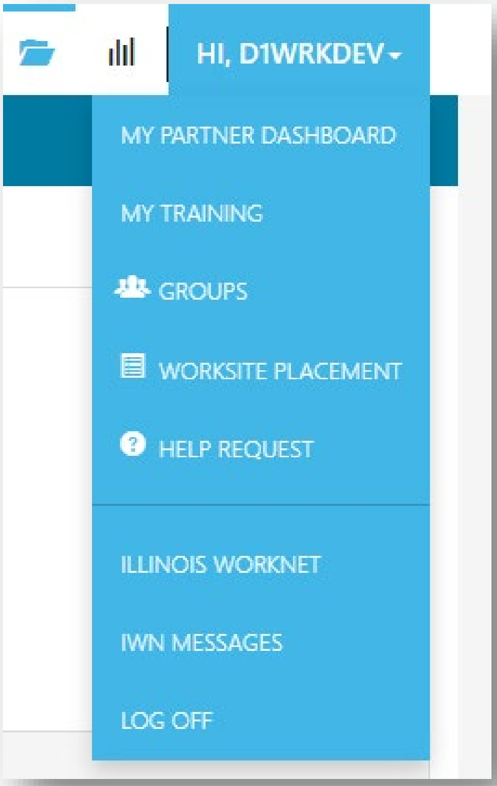
Best Practice

Make it a part of your offboarding process to notify IDHS IMMEDIATELY if a staff person with ISETS access has left your organization and needs to be removed from ISETS. Also review your user list every few months to ensure it is up to date.

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.

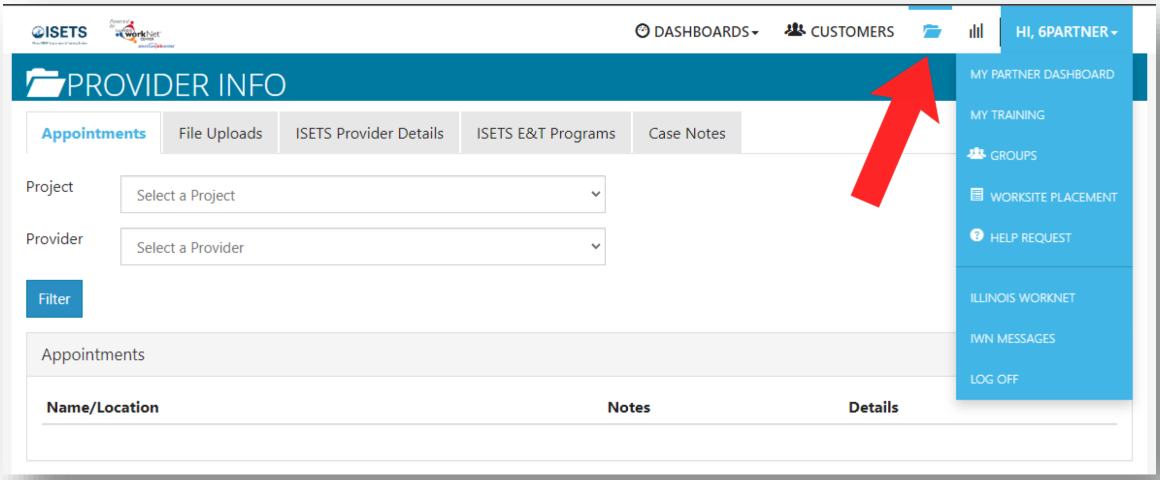
Viewing and Editing Provider Information

The Provider Information section of the 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.

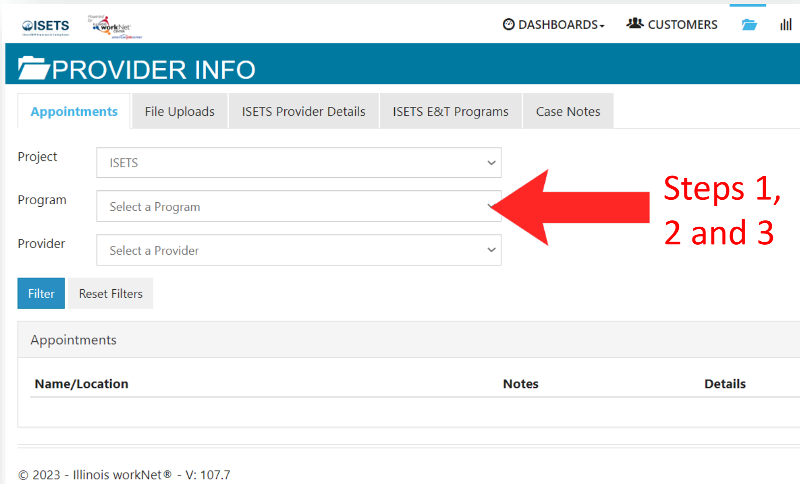
Workforce Development (IDHS)	Provider Managers (IDHS)	Program Manager (CBO)
View contract	View contracts	View Contracts
Edit Programs	Edit Programs	Edit Programs
View Worksites	View Worksites	Edit Worksites
View Services/Activities	Edit Services/Activities	Edit Services/Activities

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



Appointments

For agencies who want to offer intake appointments, office hours, or orientations, follow these instructions:



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 if a new appointment site is required.
5. Name the appointment site.
6. Add instructions for the location i.e., Bring an I.D., bring referral form
7. Appointments and Appointment sites can be deleted from the list when needed.

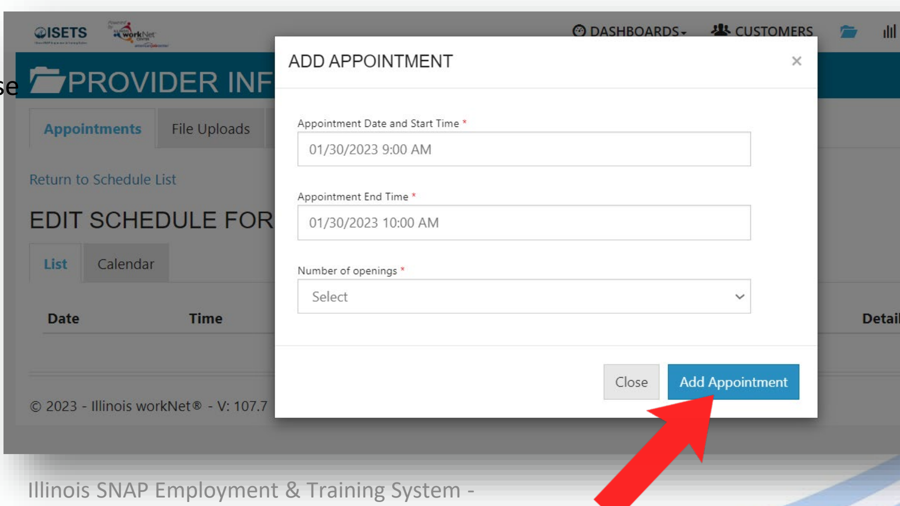
*You may find it more expedient to add recurring appointments.

To edit an existing 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.

Best Practice

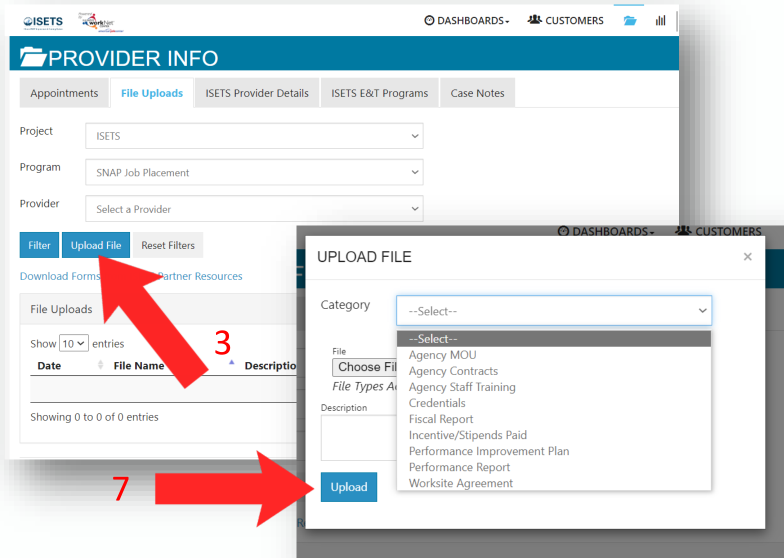
Adding appointment times helps IDHS staff when making referrals to your agency. When making referrals, IDHS staff will be able to provide the customer with specific date/times and this reduces the lag time between when a referral is made and when a customer appears for intake/orientation.



File Uploads

These are typically files that are associated with your agency, grant or staff – NOT individual customers.

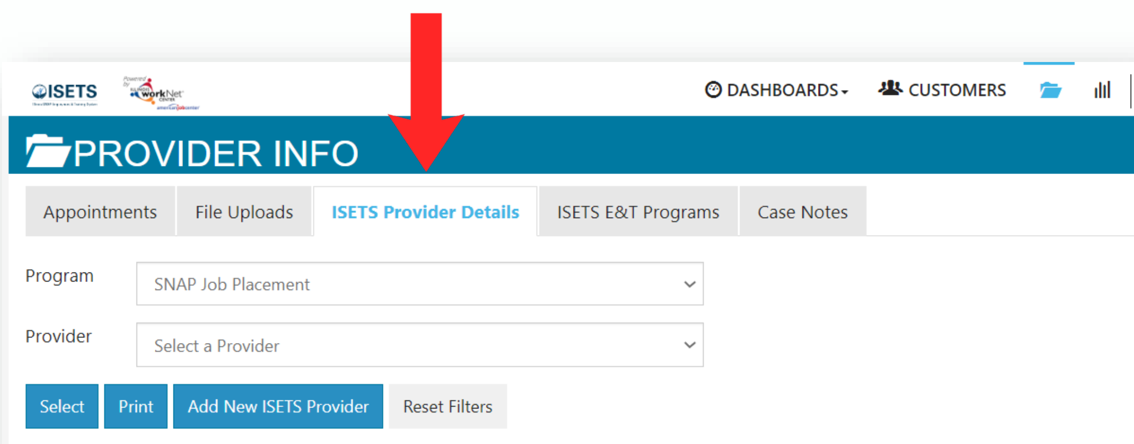
1. Select ISETS as the Project for the first dropdown field.
2. Select the appropriate Program and Provider name.
3. Click “Upload File”
4. Select type of upload category
5. Select a file to upload
6. Add a description of the file so that each file doesn’t have to be opened.
7. Click the Upload button.



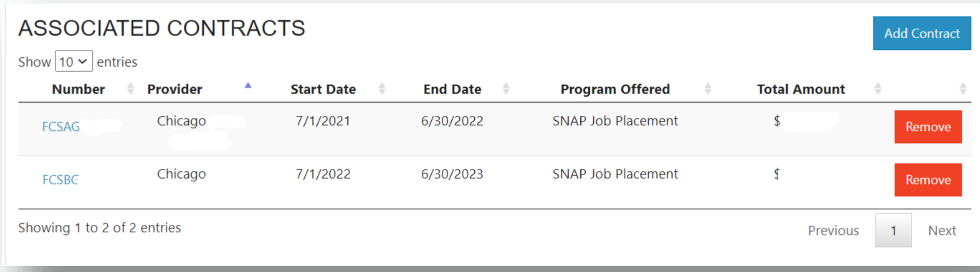
ISETS Provider Details

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 **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

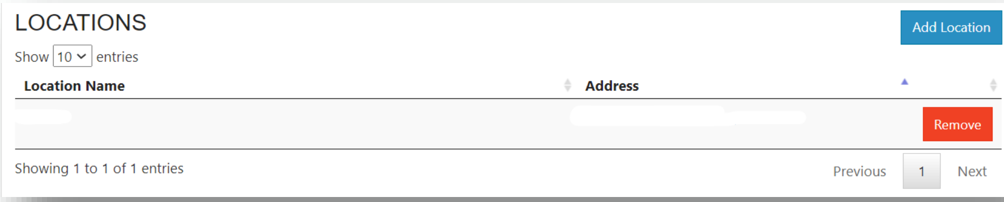
Show 10 entries

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 your program serves SNAP E&T 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

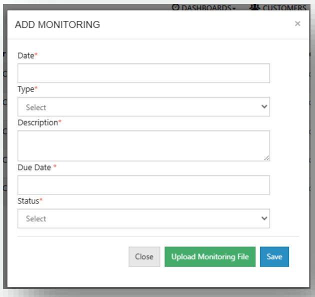
Previous 1 Next

To add a location:

1. Click on the “Add Location” button.
2. If no locations are available to add, 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.

*If a new monitoring is added, a copy of the Performance Improvement Plan document (linked in this section) must also be uploaded 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. A contract must exist for the current Fiscal Year for a Provider to receive referrals from IDHS. 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

1 Add/Edit Worksite

Show 10 entries

Search:

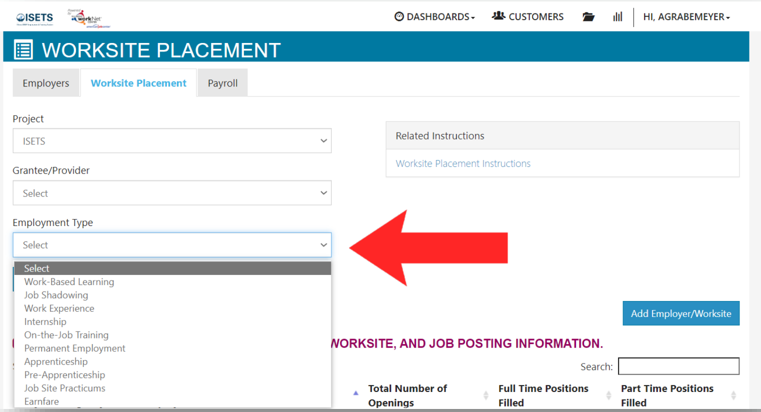
Employer	Worksite	Job Title	Job Type	Wages	Total Openings	Full Time Positions Filled	Part Time Positions Filled
Township	Township	Office Clerks, General	N/A	$12.00	8	0	0
Township	City of Wamac	Grounds Maintenance Workers, All Other	N/A	$12.00	4	0	0
Township	Salvation Army	Stock Clerks and Order Fillers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

Showing 1 to 3 of 3 entries

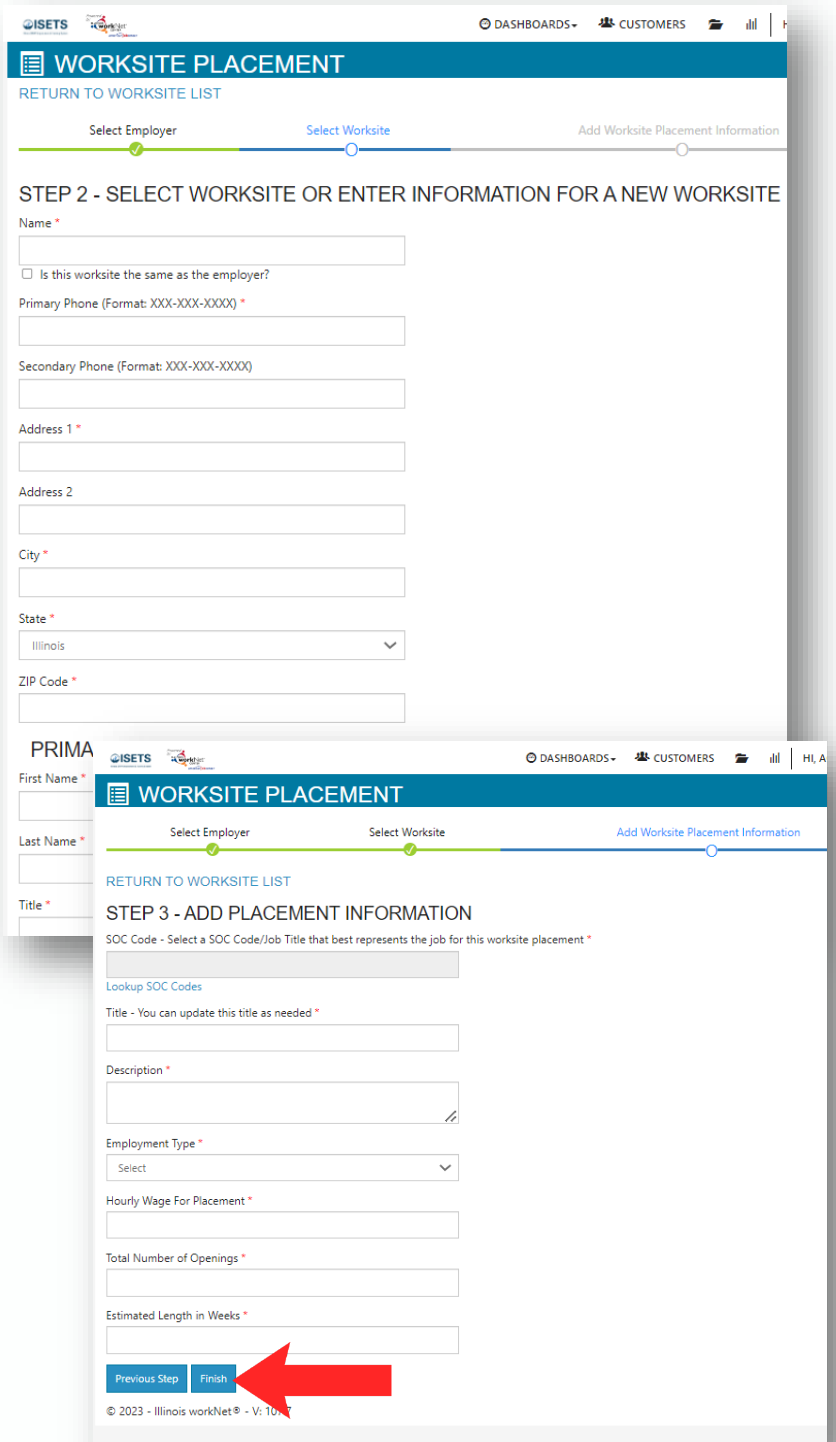
Previous 1 Next

To add a worksite:

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.

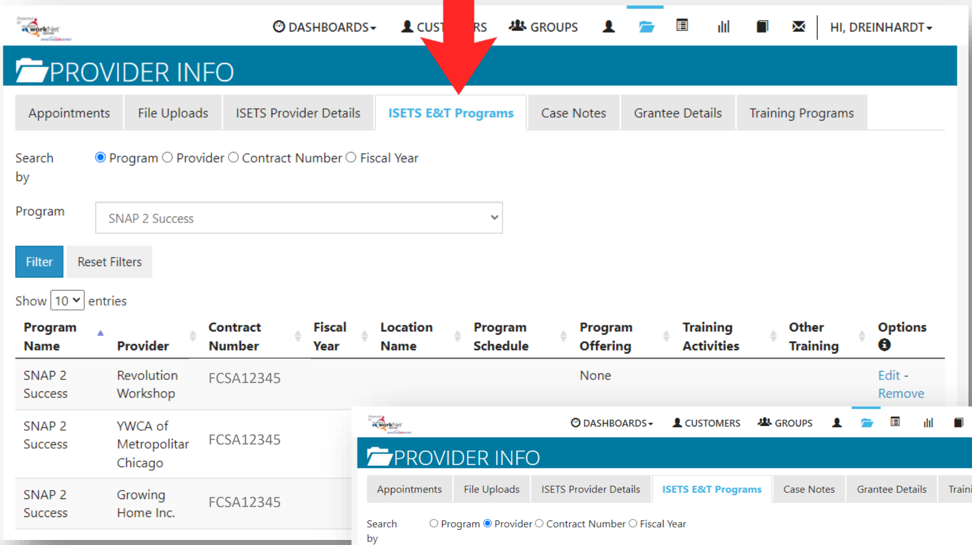


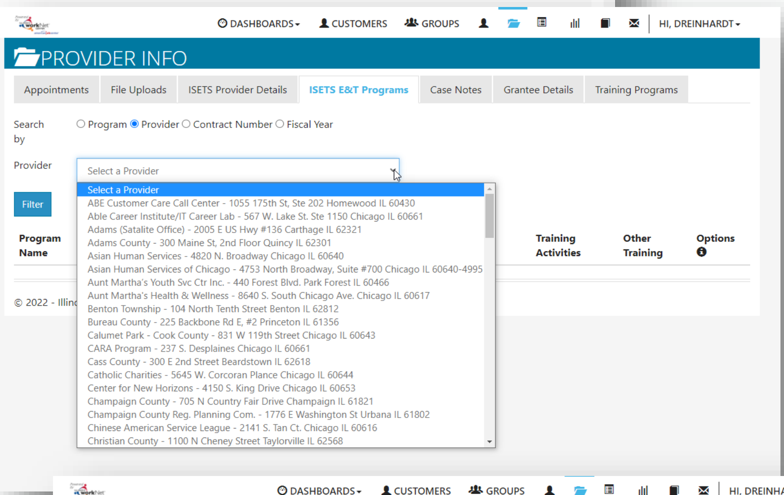
3. Click on "Add New Worksite" to add a new Worksite or click on the name of the worksite in the resulting list to edit that worksite.
4. If you are adding a new worksite, you will be taken to a page asking you to "Select Employer or Enter information for a new Employer". Choose your Provider as the 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.
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

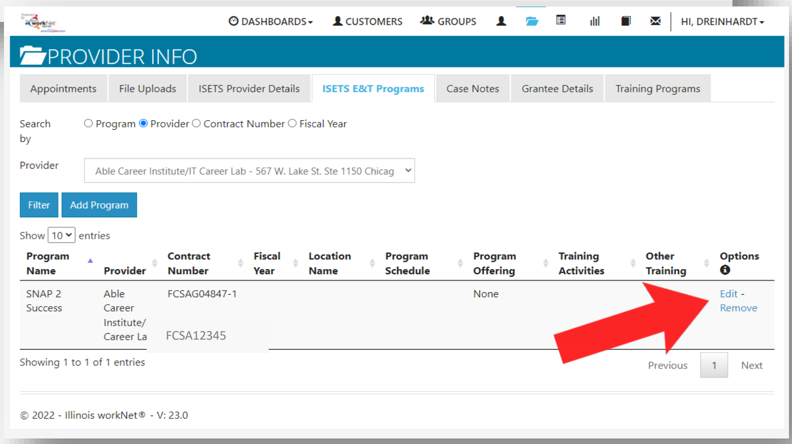
This tab represents program specific information. You can filter by clicking the radio buttons near the top of the page. Choose the type of program, the Provider name, Contract Number, or Fiscal Year and click “Filter”. Program information may be viewed or edited based on user access levels.





1. To 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.

*Note: IDHS staff should never remove a program. Programs for past years should never be removed.

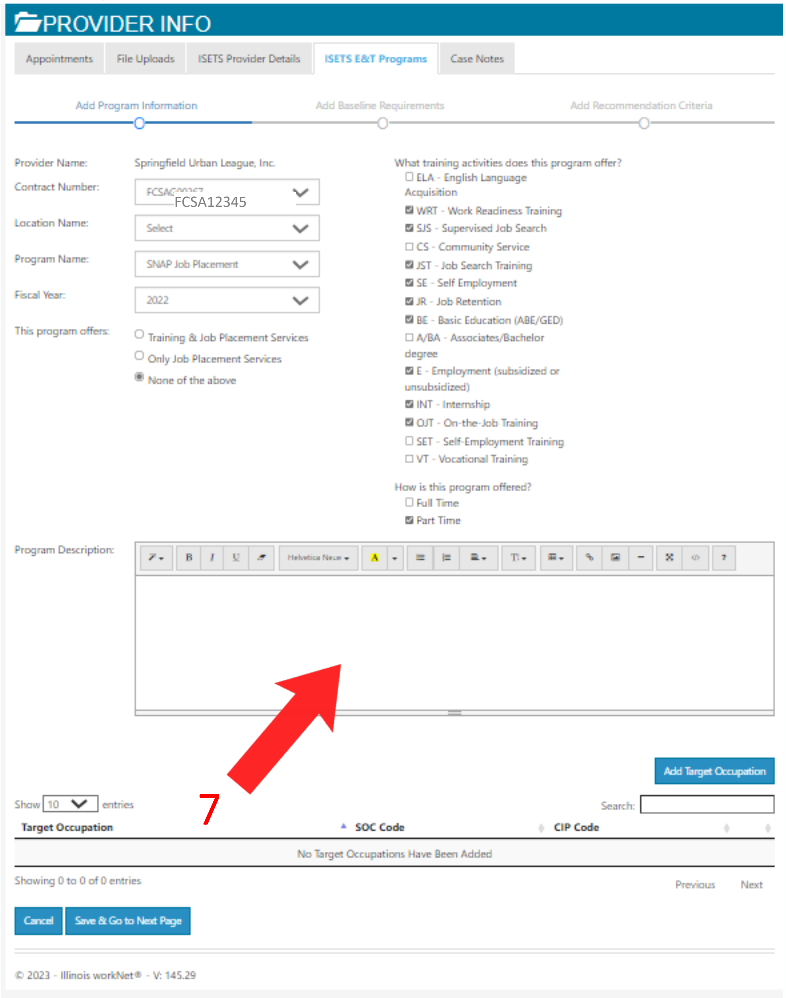


IDHS staff may have added basic information from the contract, however the specifics of your program must be edited by Program staff to ensure accuracy.

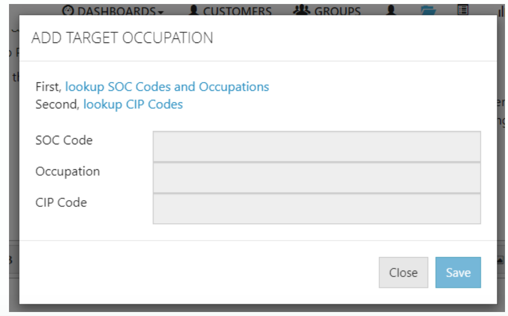
*Note: this information is used to match your program to customers seeking services, so please choose your answers to all of these questions based on which customers would best be served by this program.

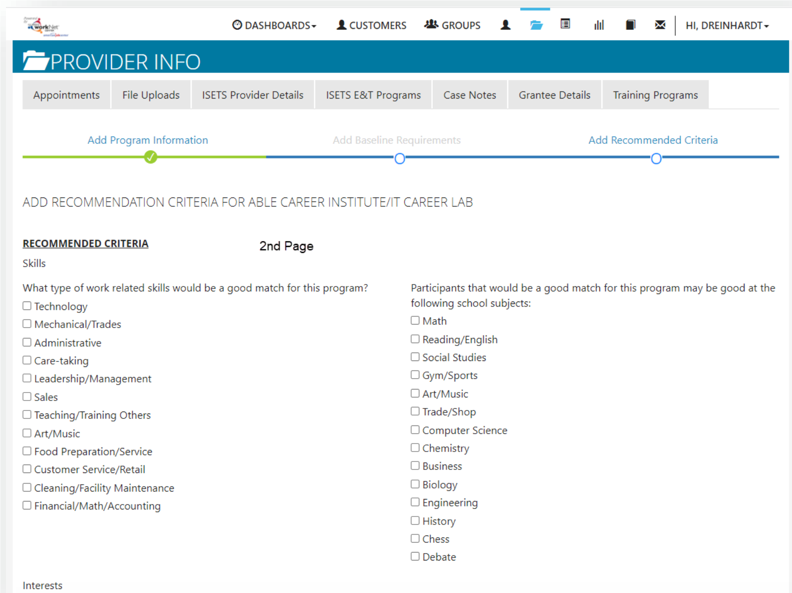
Multiple programs may be entered under the same contract if they serve different types of customers or serve customers in different locations.

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 and are named by the year of the last month.
5. Check all appropriate boxes for the activities your program is contracted to provide to customers through this program. *As a default JRS will be selected for every Program.
6. Check boxes for Full Time and/or Part Time.
7. 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 your program is appropriate for everyone, check all of the boxes to ensure your program is matched with the largest number of customers.
6. Click Finish



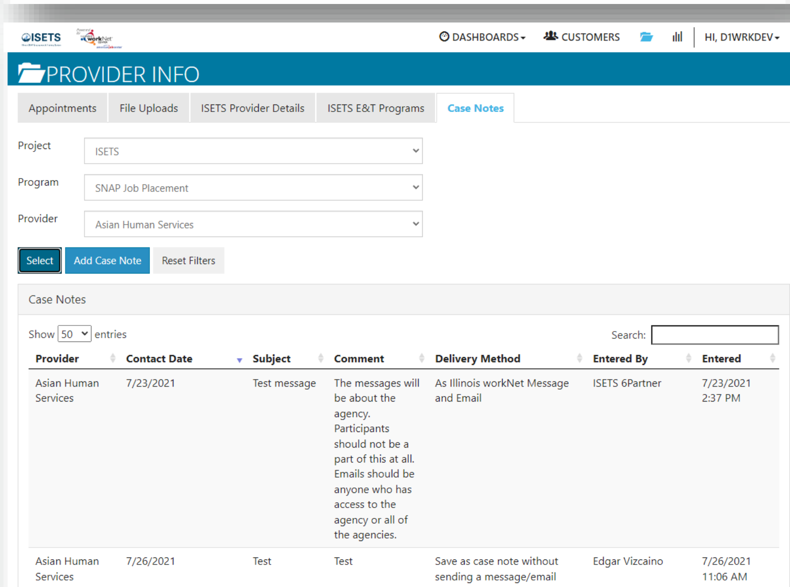


Case Notes

This tab contains case notes associated with your agency, grant or staff – NOT individual customers. To view case notes:

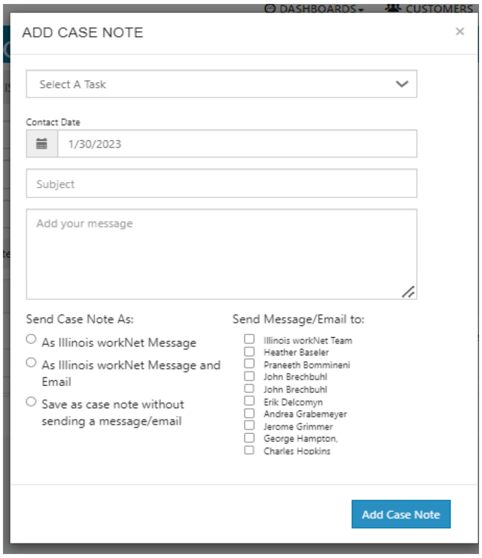
1. Select ISETS from the Project dropdown.
2. Select the appropriate Program type and Provider from the drop-down menus.
3. Click “Select”.

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



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.



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

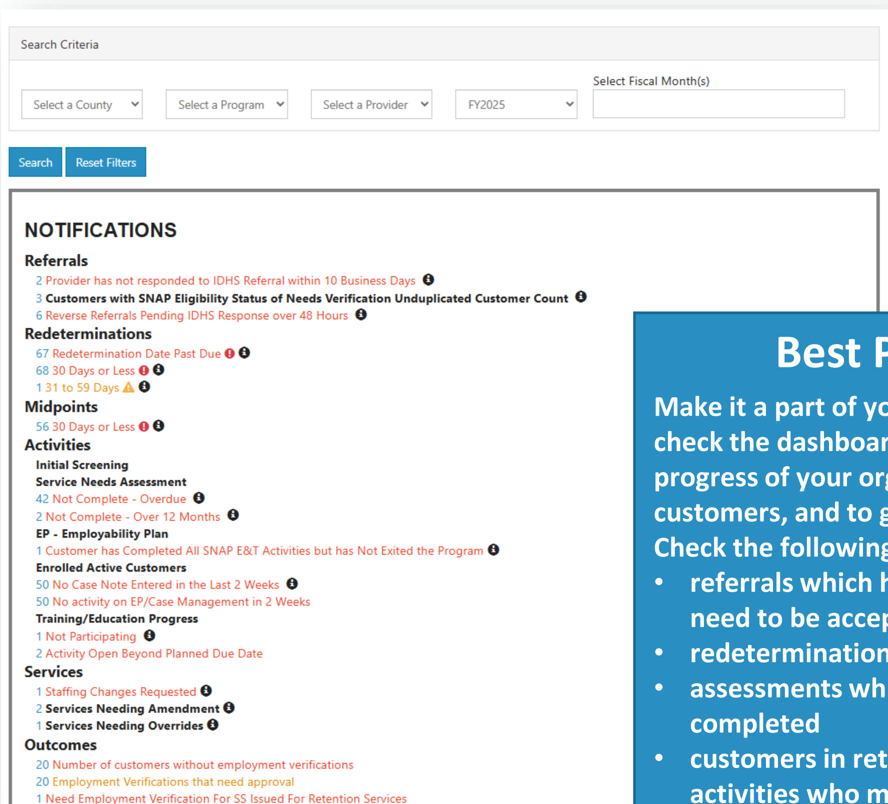
- how customers are moving through the stages of your program
- how your organization is performing measured against contractual benchmarks
- what action or next steps need to be taken with customers

Because the dashboard contains a lot of data, it may take longer to load. Please be patient and allow it a minute 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. 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.



Best Practice

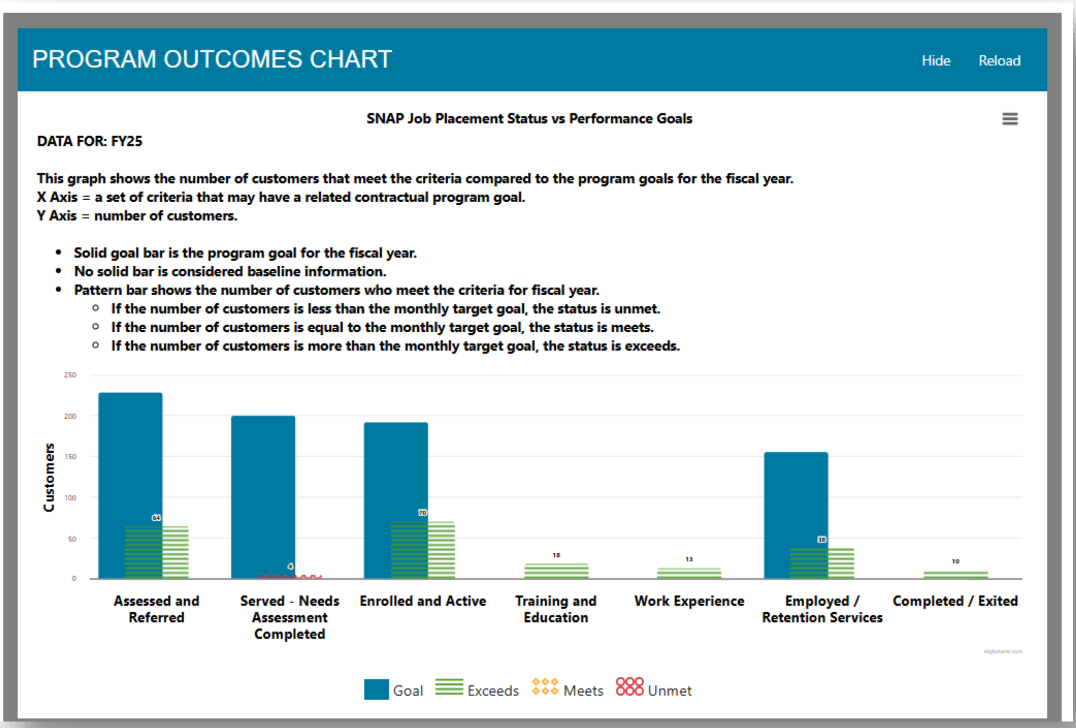
Make it a part of your daily routine to check the dashboard to see the progress of your organization, your customers, and to guide your work. Check the following frequently:

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

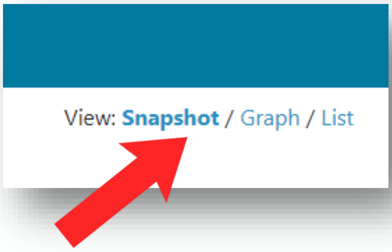
Program Outcomes Chart

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 your 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.

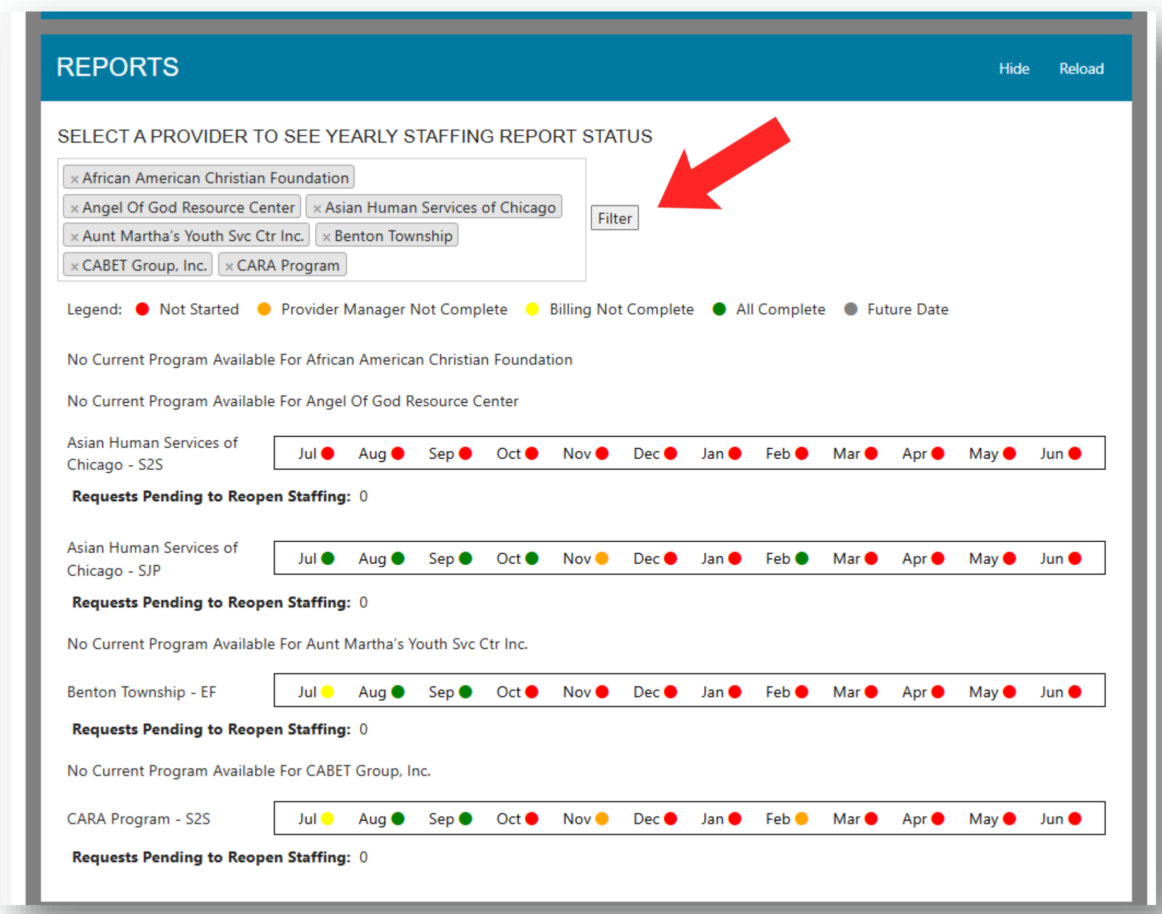


Some of these will be listed as "Good" (green) indicating that no action needs to be taken. Some may be listed as "Needs Action" (yellow) which means that an action may be pending. Some may be listed as "Red Flags" (red) which means that action is overdue.

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

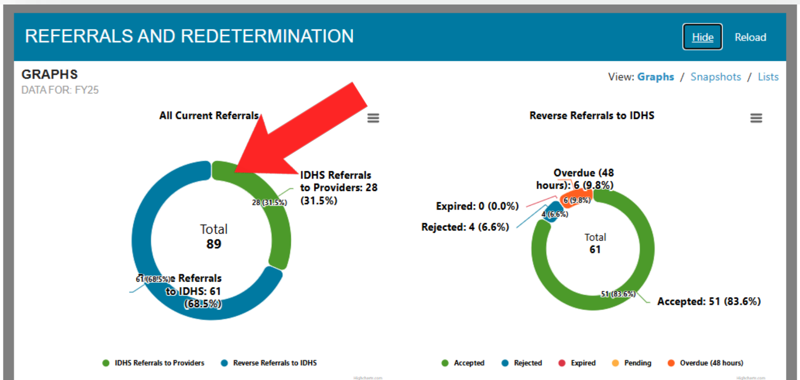
Demographics
This section gives a breakdown of the selected FY customers enrolled by ethnicity, race, age, and gender.

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.

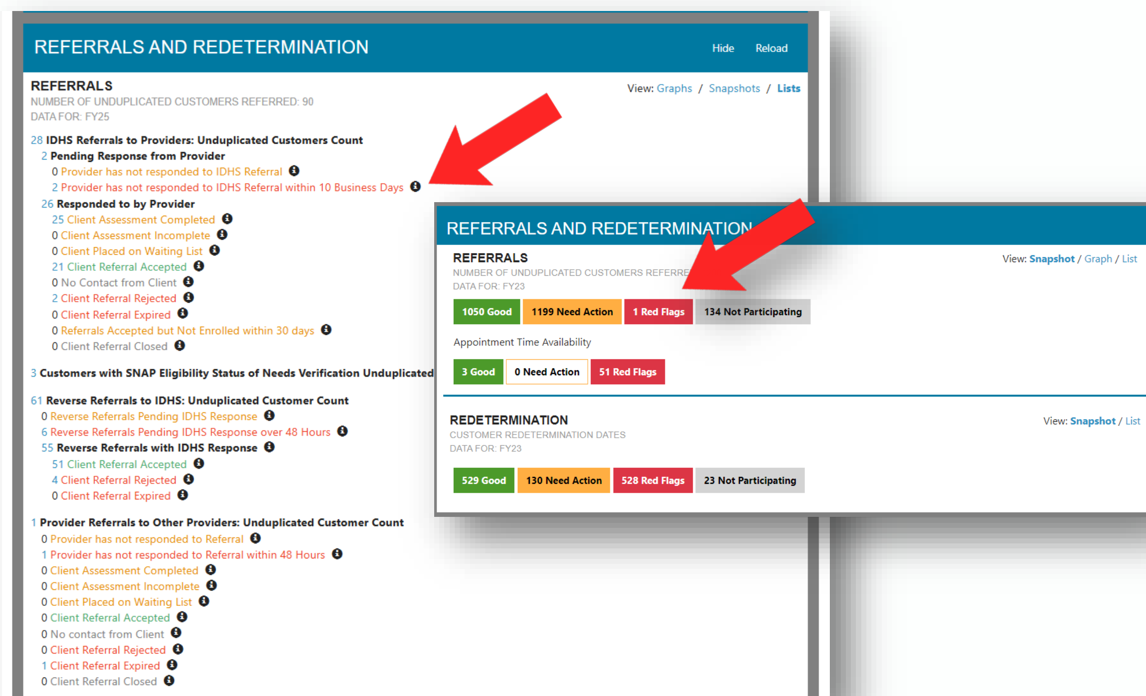


Referrals and Redetermination

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).

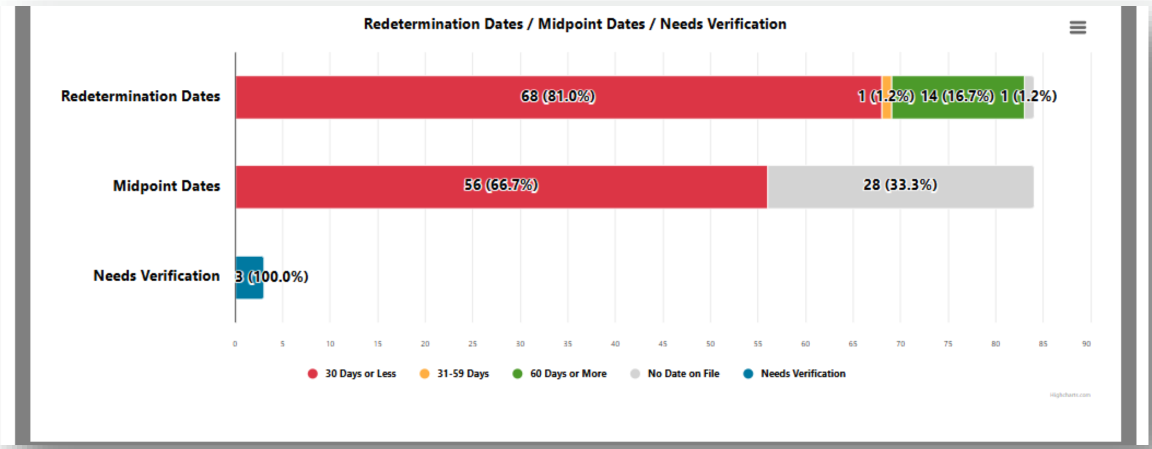


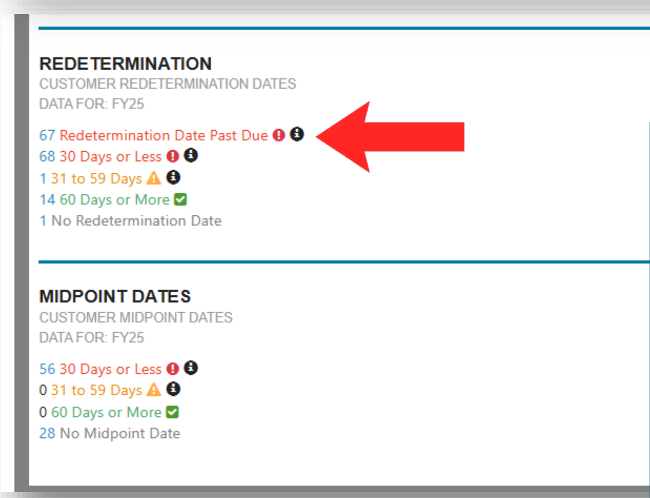
In the case of referrals, if action is overdue, these will be listed as “Overdue” in graphs or lists or “Red Flags” in the snapshot view. Please take action on these referrals immediately.



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.





Best Practice

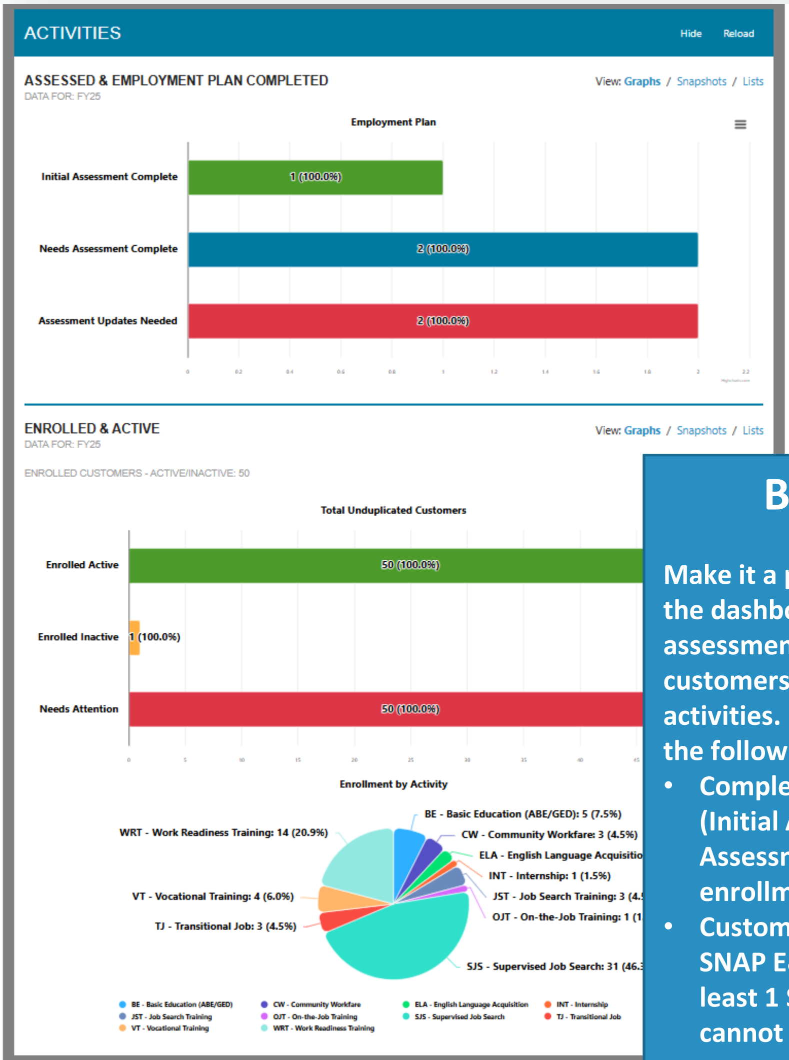
Make it a part of your routine to check the dashboard at least weekly. Providers are required to do the following:

- **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 Employment Plan (EP) completed, how many are enrolled in E&T Activities and are active or inactive. This section also shows how many are enrolled in Training/Education SNAP Activities with your 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.



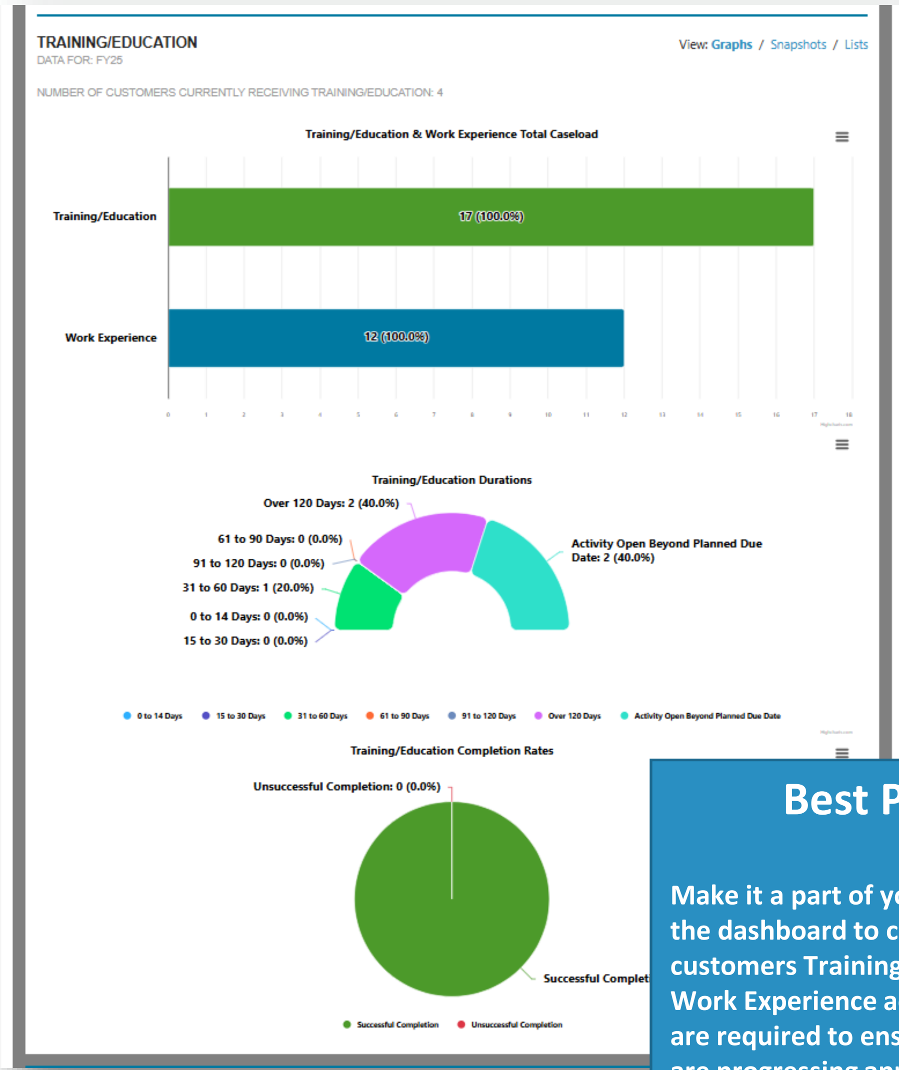
Best Practice

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.

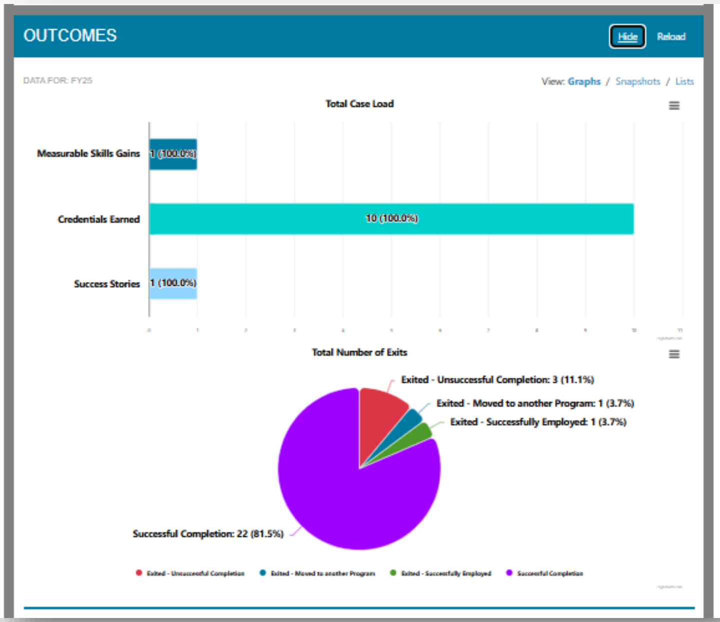
Best Practice

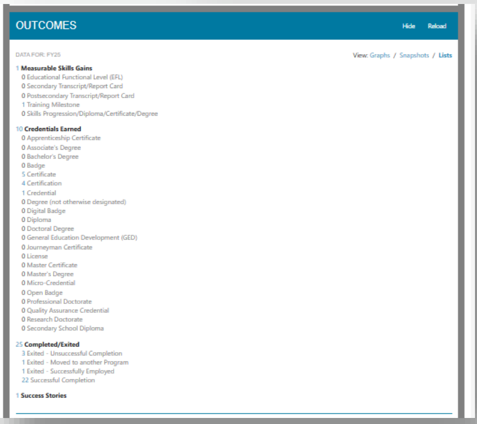
Make it a part of your routine to check the dashboard for service amendments and overrides needing approvals. IDHS staff are required to do the following:

- **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.



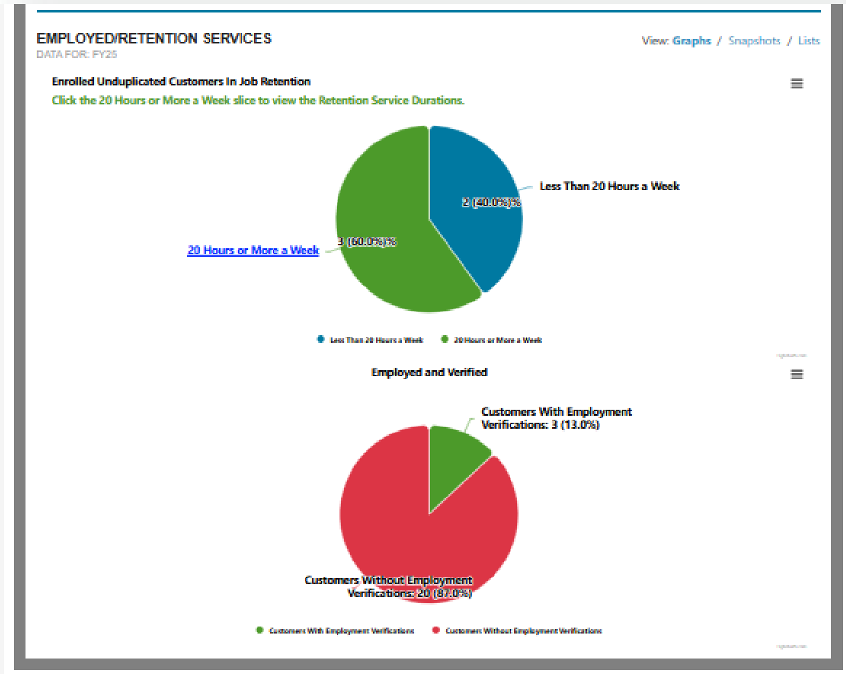


Clicking on the list view will give a list count of each type of possible skill gain, credential, and exit reason.

*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 the Appendix: Data Integrity Checklists.

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/wee. 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**”.

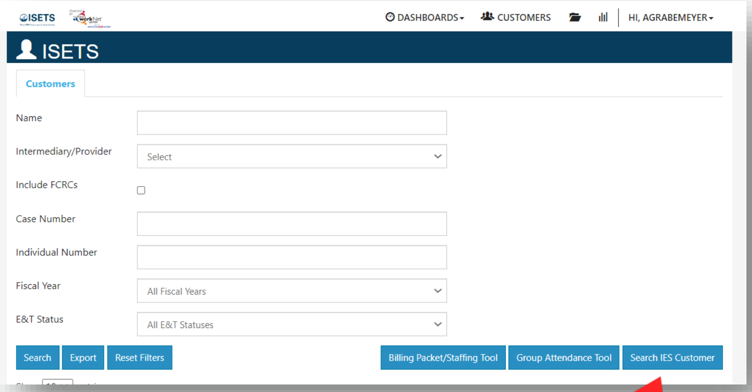
Viewing and Editing Customer Information

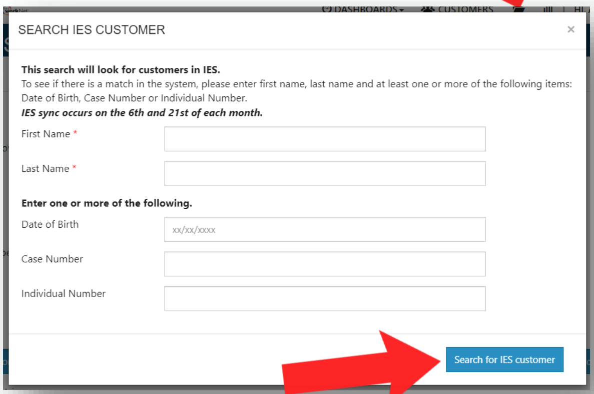
Customer data is imported on the 5th, 13th, 20th and 27th of each month at 12pm. This data comes from IES and is considered current.

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 will be able see the updated information in the meantime.

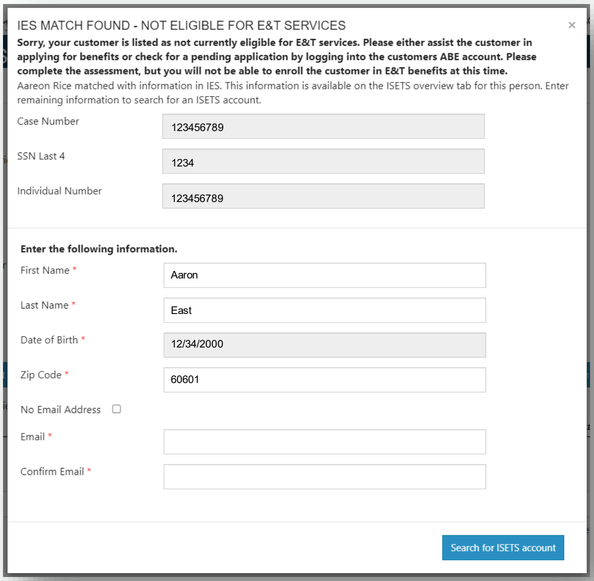
Finding a customer in ISETS

1. After you log into ISETS the default page is the "Customers" page.
2. If you are performing intake for a new customer and you want to look for their IES data and potentially associate them with your agency, 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.

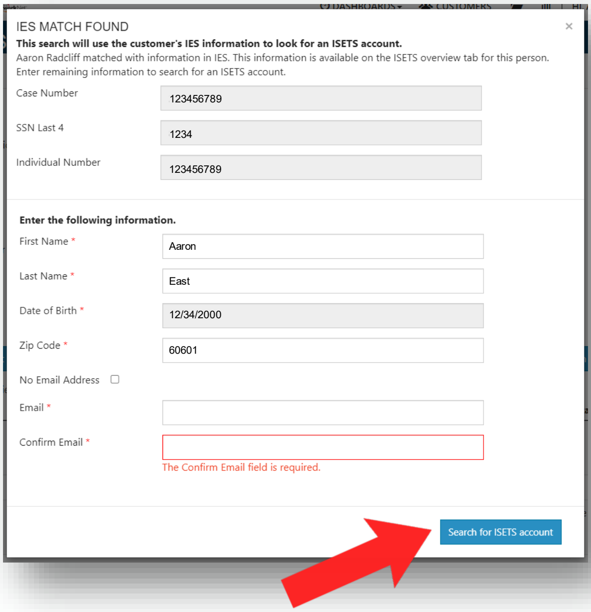




7. If you receive a message like the one to the right, it means that the person you searched for was found but that the data suggests they are most likely ineligible. In order to verify this, you should contact your Provider Manager who can look them up in IES and confirm.
8. If you would like to add them to your ISETS customer list anyway and send a referral to verify eligibility, 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.



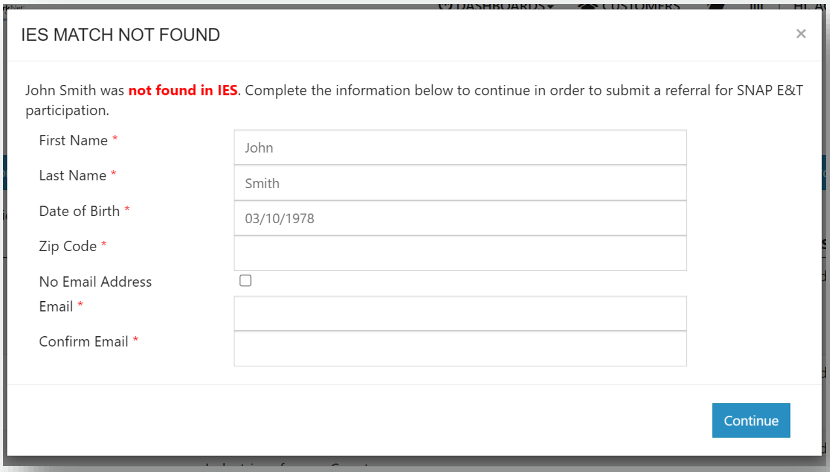
9. If you receive a message like the one to the right, the customer has been found in the IES data and you should continue by entering their email address and click the “Search for ISETS account” button.



Must Do

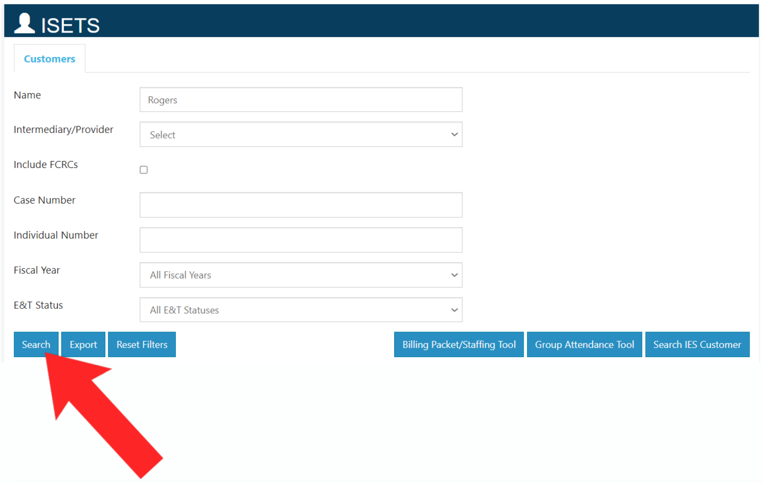
If a customer is not found in the IES data, please double check the spelling of their name, case/individual number, and birth date. This information must be an exact match to the customer data in IES. If you still cannot find the customer in the IES data and you are sure they are receiving SNAP benefits, contact your Provider Manager to verify their personal information prior to requesting that they add a new record into ISETS.

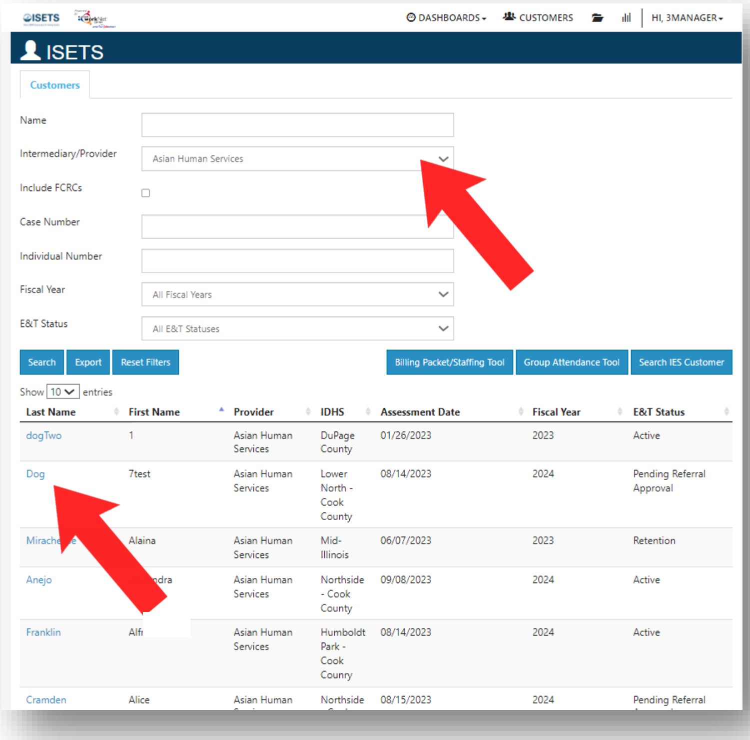
10. If you receive a message like the one to the right, the customer has not been found in the IES data. IDHS Staff may create a new customer file in ISETS by entering the information as it appears in IES. Contact your Provider Manager to request assistance with this.



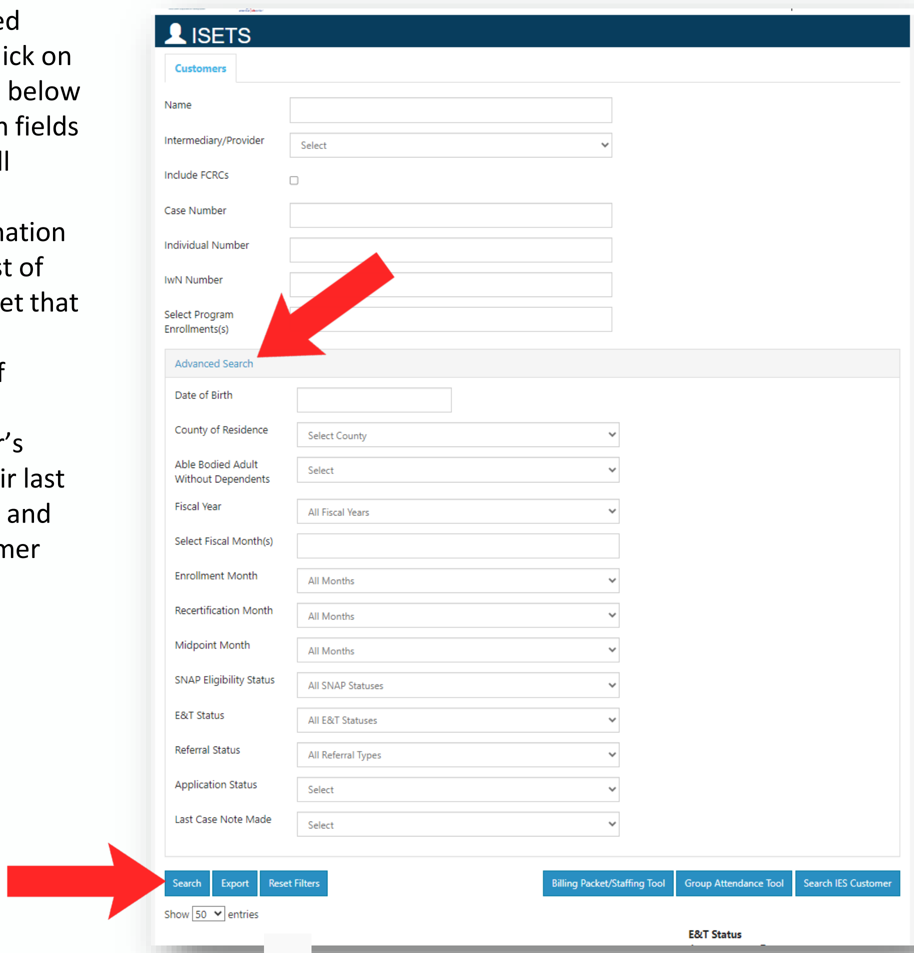
11. Then, once the customer is added to ISETS and assigned to your agency you can search for the customer you just added and proceed with an assessment and referral.

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 your agency, choose your 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.





1. To use the Advanced Search functions, click on "Advanced Search" below the standard search fields and more filters will appear.
2. Choose any combination of filters to see a list of customers who meet that criteria.
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.

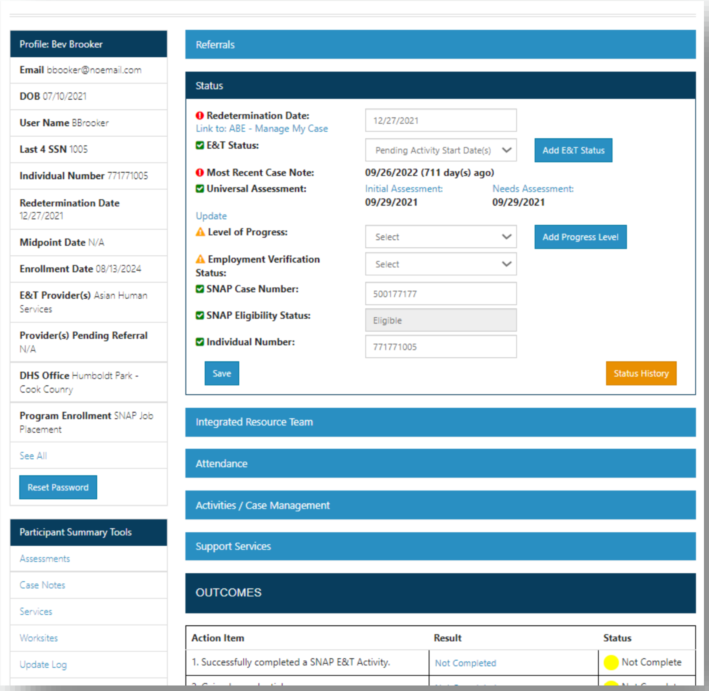


Best Practice

Use the Advance Search filters to find the following lists of customers quickly:

- **Customers with pending referrals**
- **Customers with Inactive or Wait List status**
- **Customers who need eligibility verification**
- **Customers who haven't had a case note within the past 2 weeks**
- **Customers who might have recertification or midpoint dates approaching**

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 at the top. 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 date of the last case note, 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 can 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, you 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 to Exit the customer at the end of the program year/fiscal year if they have been marked as "Inactive" for more than 30 days.

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

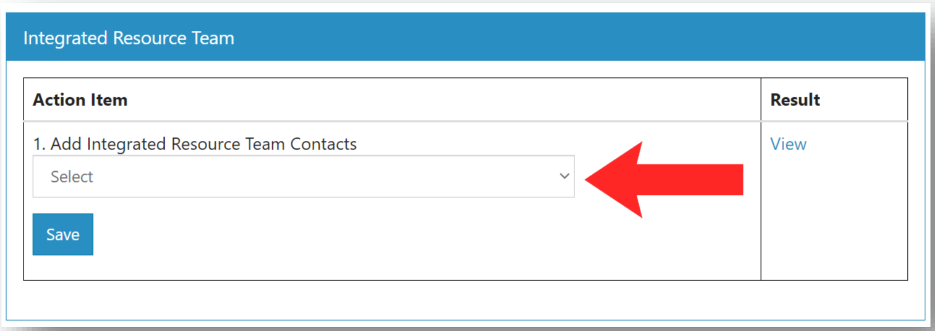
- **Inactive**: still enrolled officially in SNAP E&T but not participating (no attendance) temporarily. (limited to 30 days)
- **Active**: actively attending SNAP E&T Activities. Must have an “Open/Started” SNAP E&T Activity on their EP.
- **Exited**: No longer enrolled in SNAP E&T.
- **Retention**: 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.
- **Referral Expired**: a referral was made but expired (this is a temporary status used in between when a referral expires and when it is reworked by IDHS Workforce Development)
- **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.

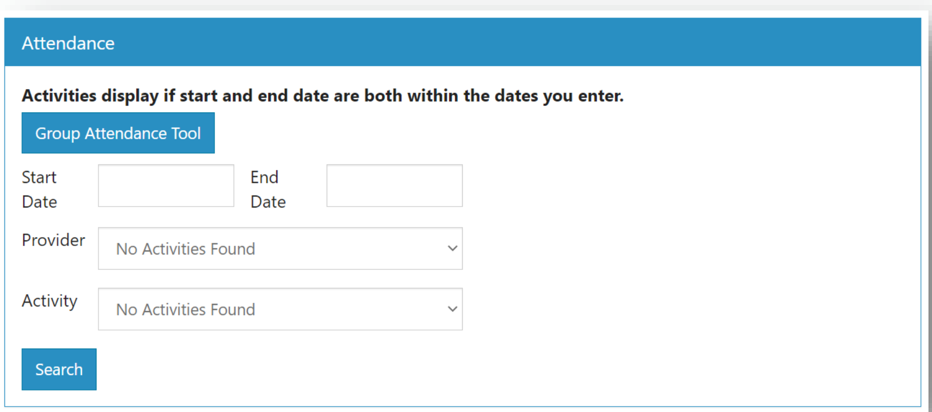
During enrollment you may choose individuals to add to the customer’s IRT. This is the most convenient time to do so. However, other individuals can be added from the customer’s record

To add a team contact to a customer record, in the Overview page, click the dropdown menu, select a person from the list and click “Save”.



Attendance Section

This section allows a Provider to add an individual’s attendance to their record. If you prefer to use the Group Attendance Tool (best for entering a group learning session or orientation), 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.

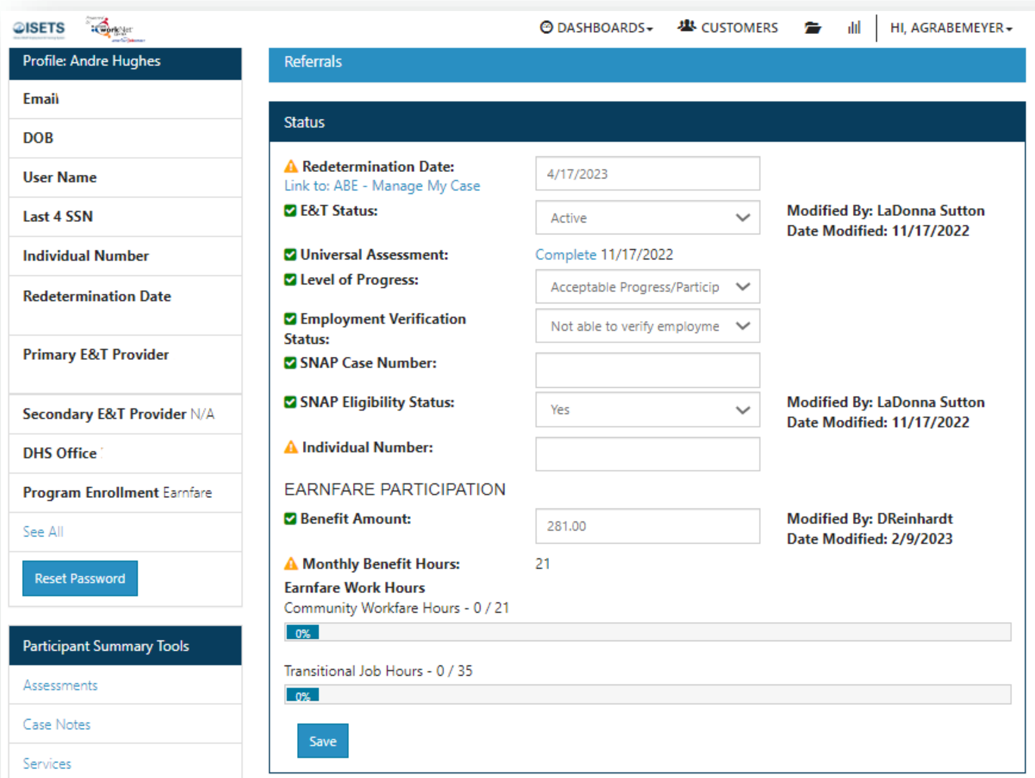


Attendance may be entered by any Provider staff (or instructor) in ISETS or by customers in their Illinois workNet account. All attendance **must** be verified by authorized Provider staff to ensure that attendance is correct before saved as a final record.

Paper copies may be kept by a Provider but is not required to be uploaded to ISETS. A copy of attendance may be 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 attendance hours.

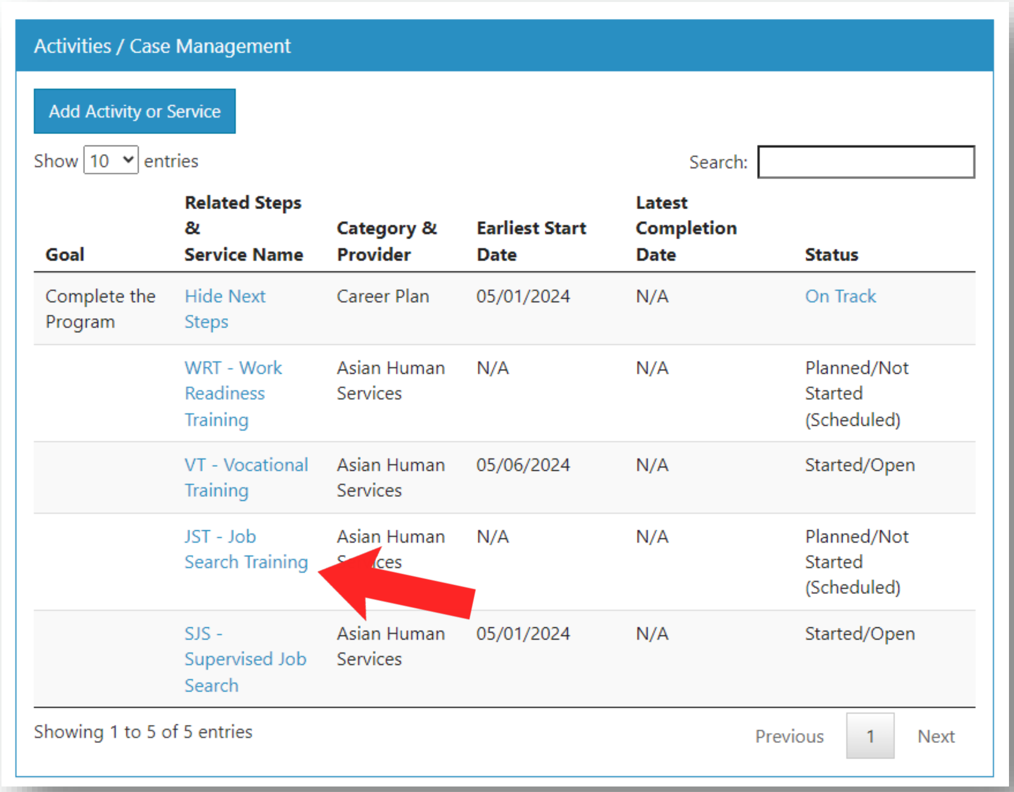


Activities/Case Management Section

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 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.

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.


Activities / Case Management

Add Activity or Service

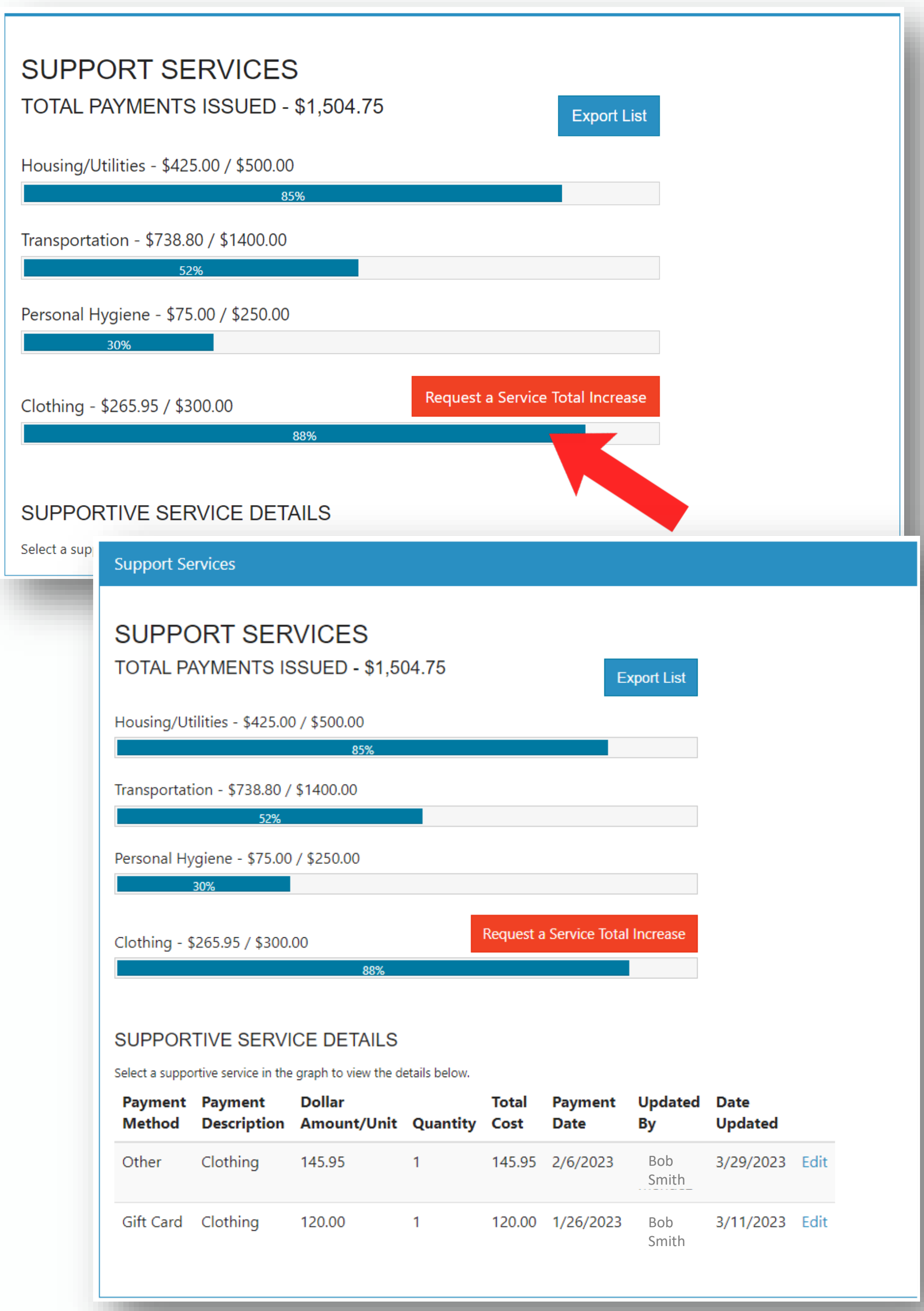
Show 10 entries Search:

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)
	SJS - Supervised Job Search	Asian Human Services	05/01/2024	N/A	Started/Open

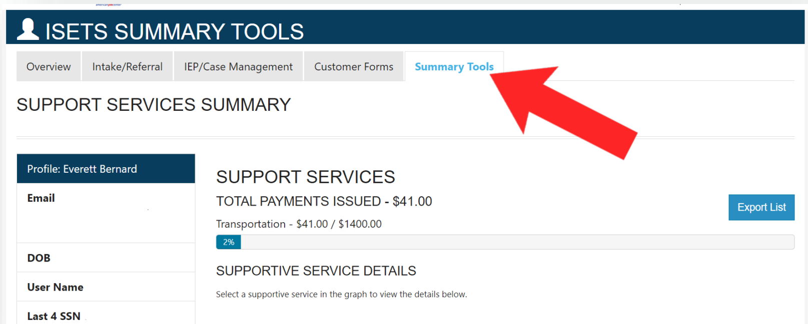
Showing 1 to 5 of 5 entries Previous 1 Next

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. Click on the blue linked title of the Support Service Category to add costs or edit that service.

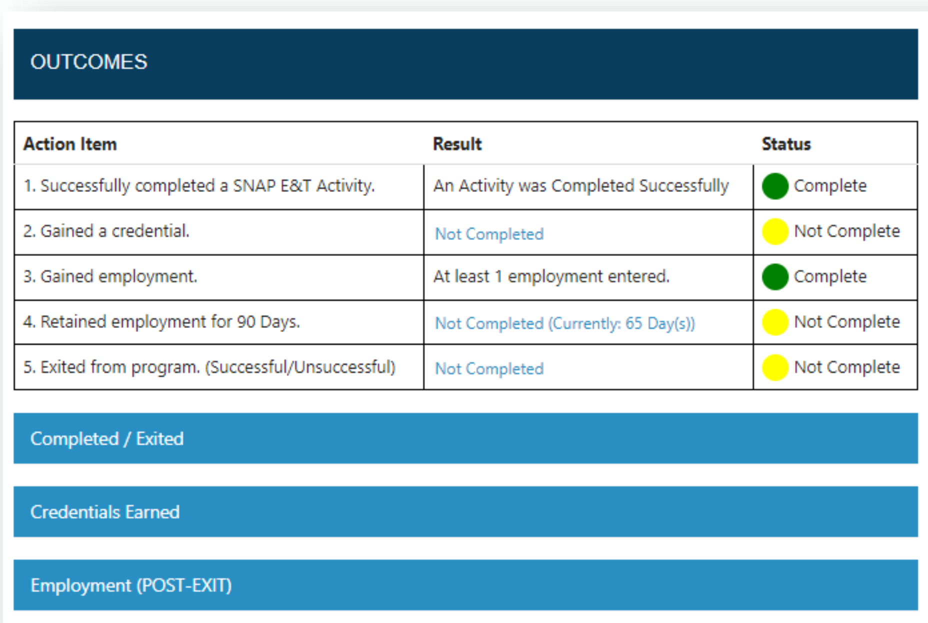


An additional detailed summary can be found in the “Summary Tools” tab at the top of the Customer Record. More about adding and [managing Support Services]in that section of this manual.



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.



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

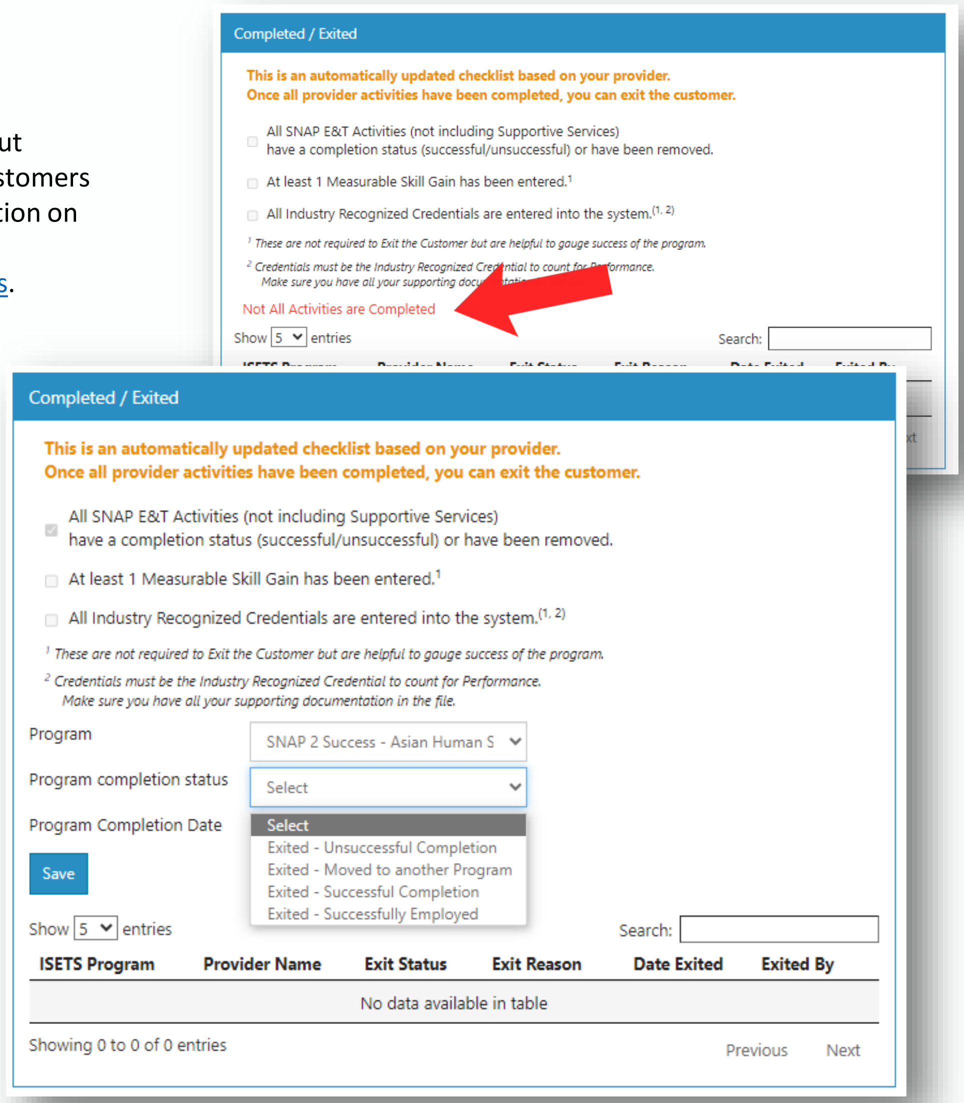
Employment (POST-EXIT)

Completed/Exited Section

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

1. First all open 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 like the one below.
2. Choose your 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".

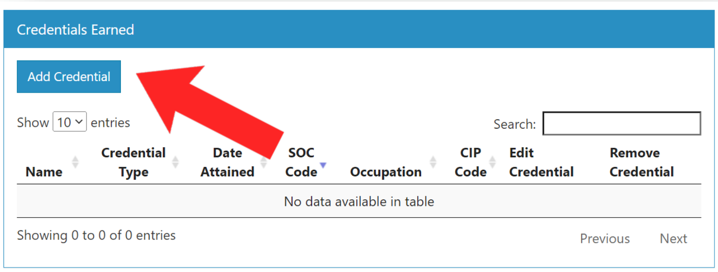
More about Exiting customers in the section on [Exiting Customers](#).

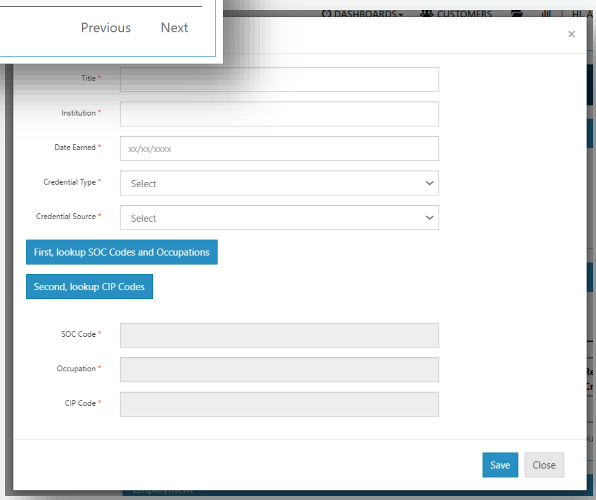


Credentials Earned Section

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.



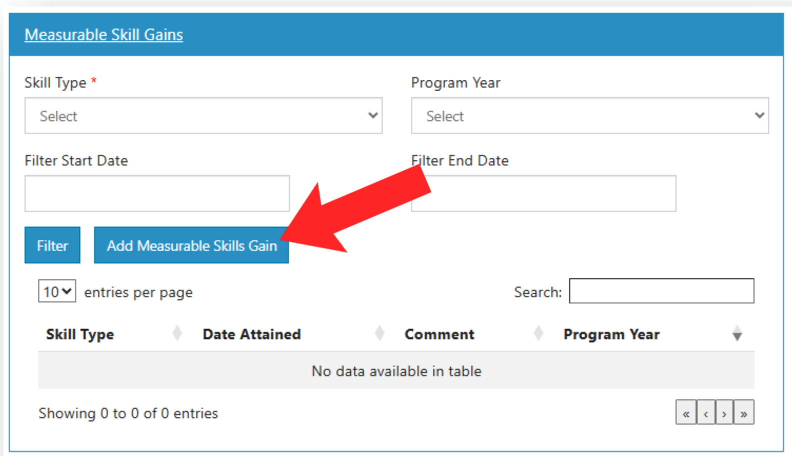


5. A new popup window will open labeled “Add/Edit Credential”.
6. Add all information about the credential and click the “Save” button.
7. SOC Codes and CIP Codes are used to determine the industry and occupation the credential pertains to.

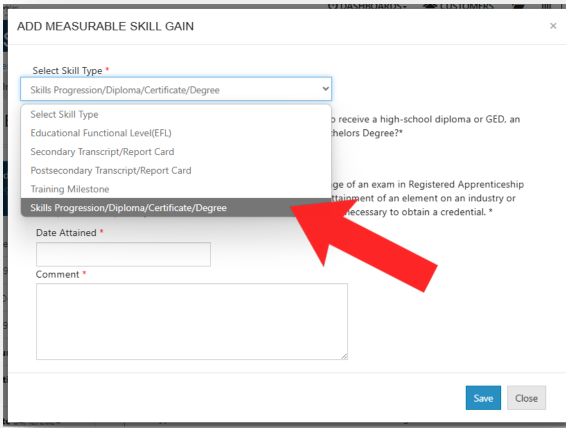
Measurable Skills Gained Section

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.



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



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.

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 approximately once every 8 days. 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 into 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 redone 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.

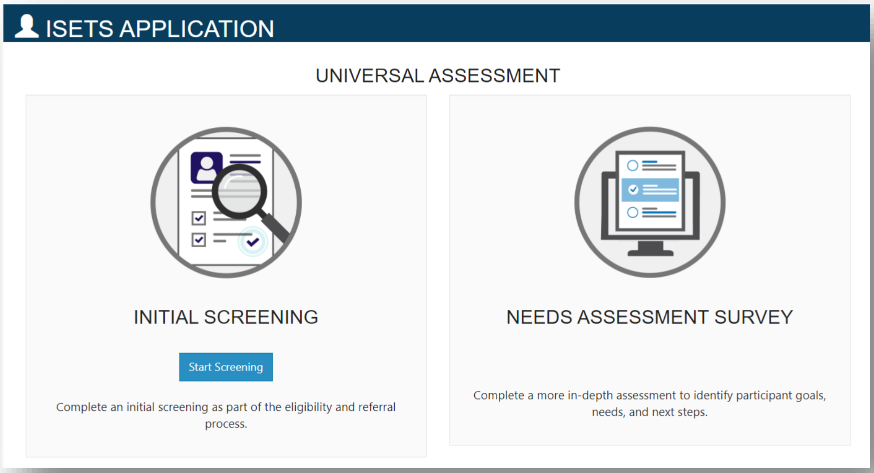
Assessments

The first step in the customer intake process is to complete a universal assessment. This assessment will allow you to view recommended Providers/programs, send reverse referrals, and make referrals to other providers.

The Universal Assessment developed specifically for IDHS/ISETS 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. This section should be completed within 30 days of enrolling a customer.

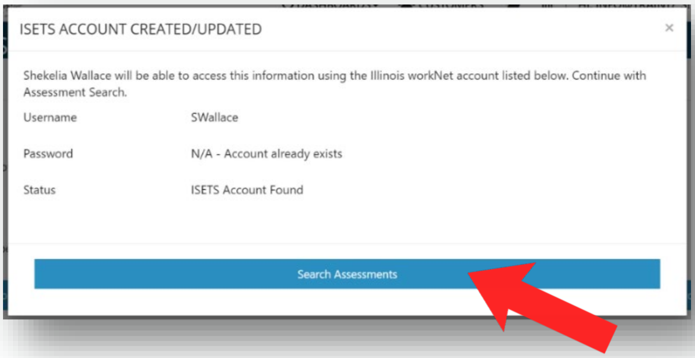
Both parts may be completed inside ISETS or using the paper version of the form which can be entered into ISETS within the first 30 days of enrollment.



Best Practice

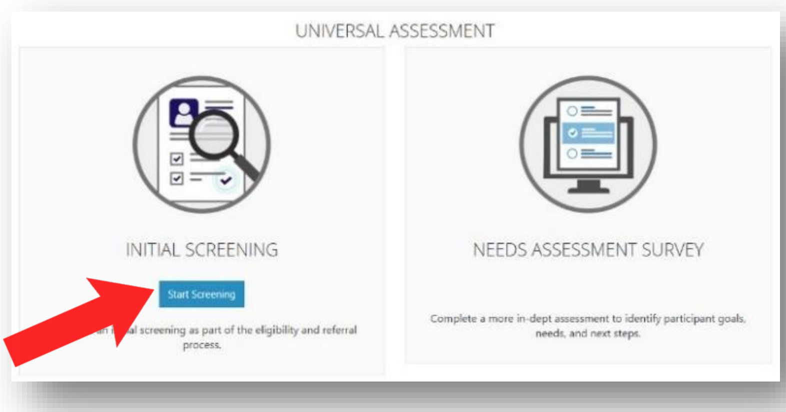
Both parts of the Universal Assessment must be completed for every customer you work with. The Initial Screening at least must be done in order to send a referral and enroll a customer. The Needs Assessment Survey may be completed at a later date after the customer is enrolled in a program. Your agency's process for when and how you complete these assessments should be determined by your agency's leadership. Needs assessments should be completed within 30 days of enrolling a customer.

If this is a new customer, follow the instructions for searching IES the customer. If this is a new account, you will see a screen like this:



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.

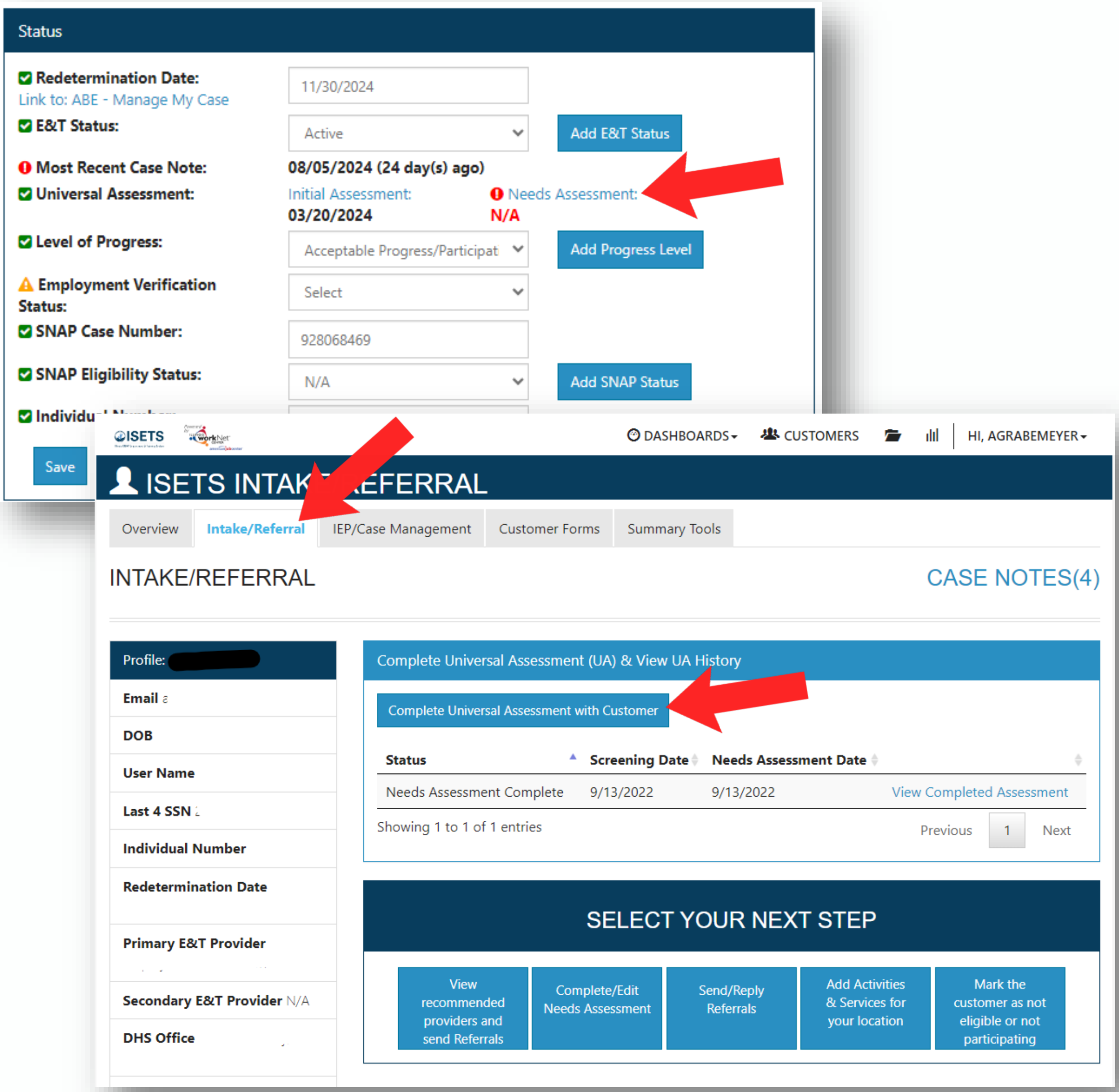


3. Complete each section of the Assessment. As sections are completed the row across the top will show the progress and the current section.

4. 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 assessment completed, view that customer's Status in the Overview screen. You may also go to that customer's record and click on the Intake/Referral tab. If there is already an assessment with a date within the last 12 months, no additional assessment is needed, simply review the assessment that is there with the customer and determine if updates need to be made.

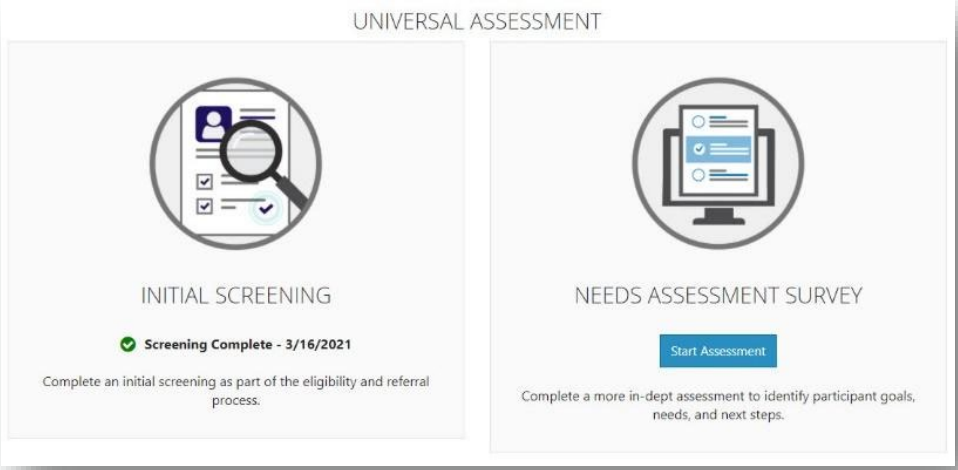
If there is no assessment listed, please complete a new one for the customer.



Complete the Needs Assessment

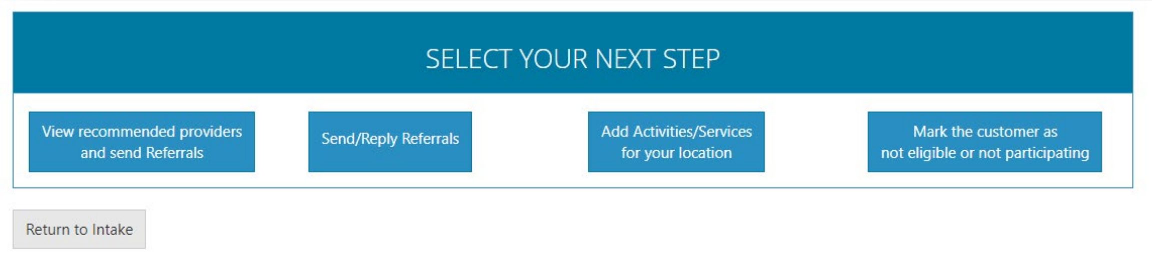
The goal for Providers is to complete both the Initial Screening and the Needs Assessment within 30 days of enrolling a customer. If you see a screen like the one below it means that the initial screening was completed, and the Needs Assessment was not.

1. Click on the “Start Assessment” button.

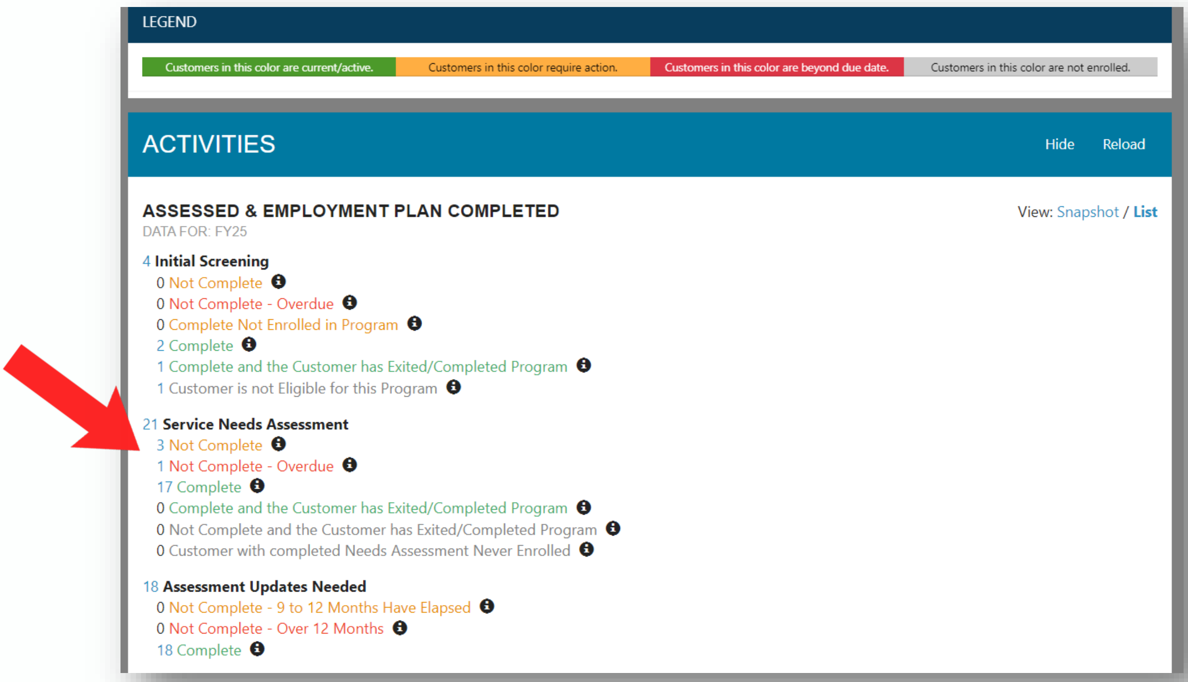


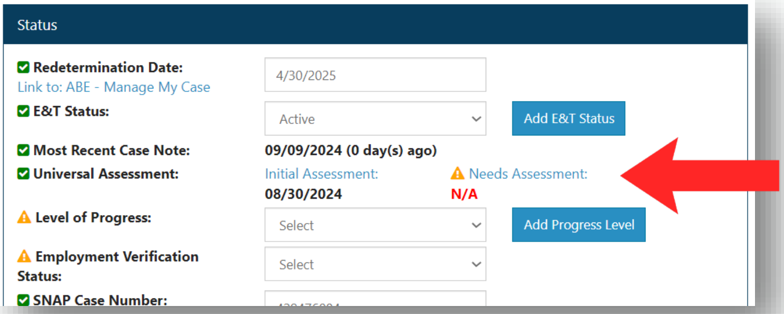
2. Complete the details for each section of the assessment. As sections are completed the row across the top will show the progress and the current section (as with the Initial Screening).
3. You may also make edits to these sections. if you click on the blue title of that section, it will take you back to that section.

4. On the last tab click the “Submit Application” button.
5. Click Save and Return to Summary when done. You may also choose to print the assessment if you need a paper copy.
6. At the bottom of the summary select your next step.



If a customer does not have the Needs Assessment completed, you will also see a red notice on the in the dashboard. 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.
Needs assessments must be completed within 30 days of enrollment. If Needs Assessments are overdue, complete the Needs Assessment with the customer as soon as possible. The number of Needs Assessments incomplete during the program year will be considered when evaluating Provider performance and whether to award future contracts.





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).

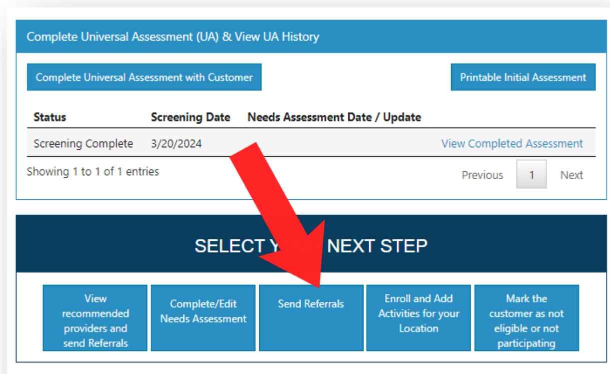
Before enrolling a customer in a SNAP E&T program, a Provider must either receive a referral from IDHS or send a reverse referral to IDHS. This ensures that the customer is confirmed as eligible and prevents ineligible customers from being enrolled and served.

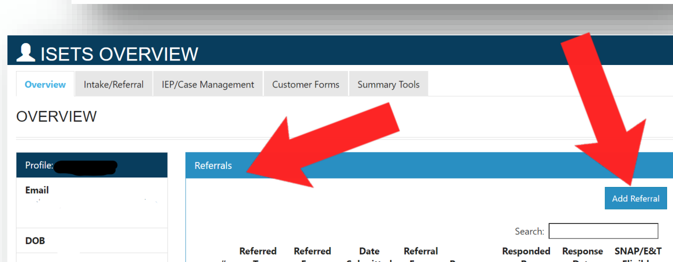
If a customer has a referral within the last 45 days but was never enrolled, a new referral is not required. If a customer has participated in the past but has not participated in the past 45 days a new referral is also not required. However, in both these scenarios, verifying eligibility and updating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

Making Reverse Referrals to IDHS (Reverse Referrals)

1. After you have completed the Initial Screening, you may make a reverse referral to IDHS to verify eligibility.
2. You can click the “Send Referrals” button to create a new reverse referral, or you can go back to the Overview tab on the customer record and expand the Referrals box.
3. Click on the “Add Referral” button.
4. If you see the “Please complete the Universal Assessment before adding Referrals.” message in the Referrals box, that means this customer does not have an assessment yet and it must be completed before creating a referral.
5. Click on the message and it will take you to the Initial Assessment to complete.





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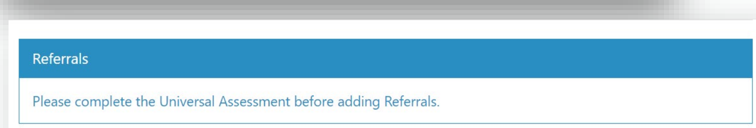
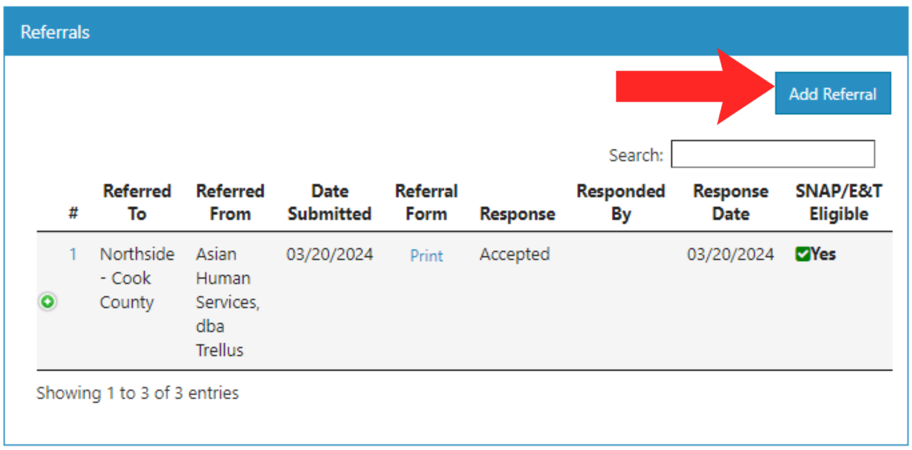
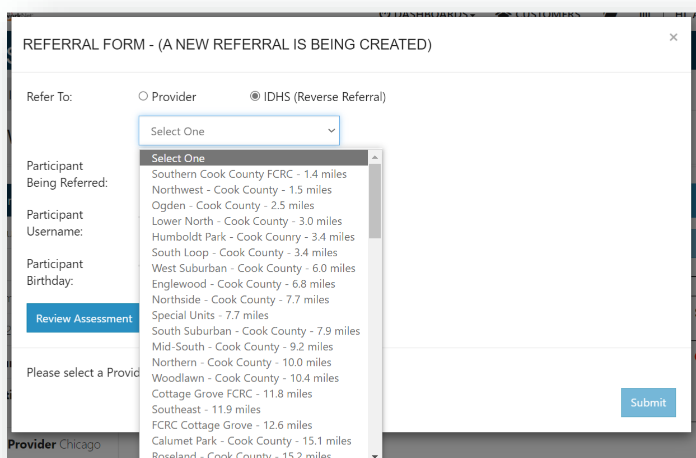


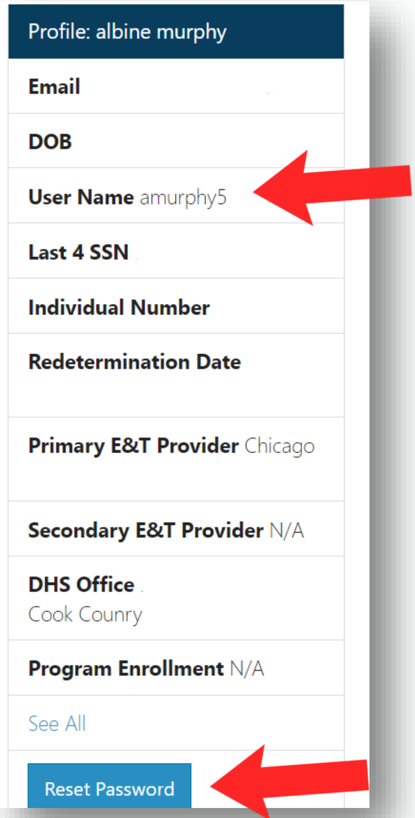
Note: If you previously completed an Initial Assessment, you can also go to a customer's Overview page and click on the Referrals section. There you will also find an "Add Referrals" button. The Initial Assessment must be completed before sending a referral.



6. After clicking the "Add Referral" button, a window will pop-up with the Referral Form.
7. Click the radio button next to "IDHS (Reverse Referral)".
8. Choose an FCRC from the dropdown list. This can be the closest one to the customer or the one the customer says they have been working with. The choice can always be changed later as IDHS has a "No Wrong Door" policy for customers seeking help from FCRCs.



16. A button will appear saying “Submit for Customer Consent”. This button will give you two options for gaining the customer’s consent to send a referral to IDHS.
    a) If you are with the customer and can read the statement to them or allow them to read it, enter their Illinois WorkNet username and password and click the box indicating they have read and agree to the terms, and the “Submit Consent” button.
        1. *Note: if the customer does not know their username and login, you can look for their username in the customer record on the left hand side. If they do not know their password, you can click the “Reset Password” button and reset their IWN password for them. You will need to exit out of the Referral Form to do this and then you will need to click the “Add Referral” button again to begin again.

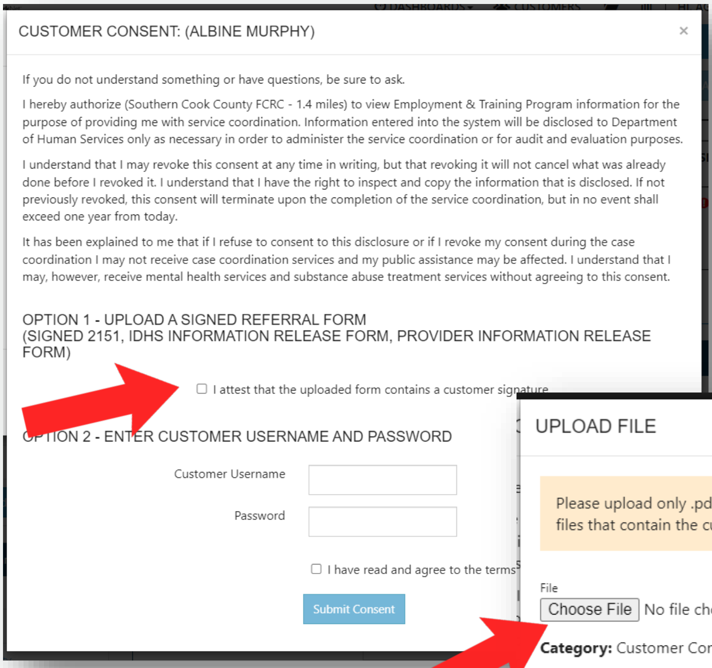


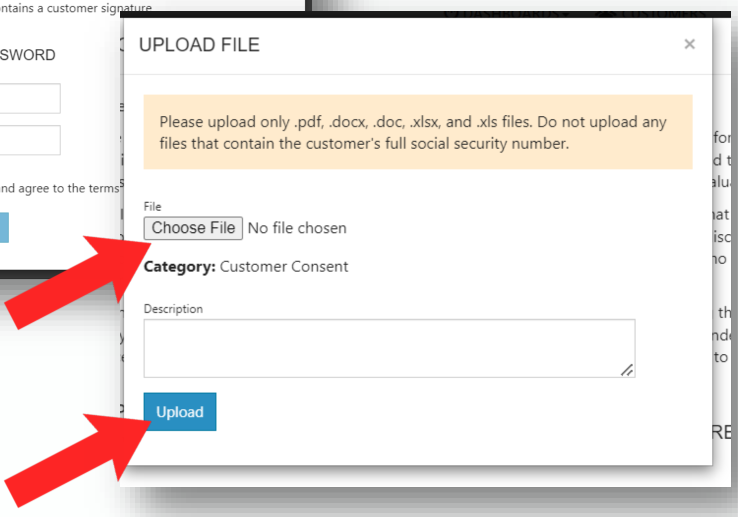
b) If you have a signed form to upload and do not have a customer present to consent, you can click the attestation box and click the “Submit Consent” button.

1. *Note: this form must be either a 2151 form from 2022 or a 4790 form from 2023. Any form must be signed by the customer indicating that they give consent to share their information with IDHS for the purposes of enrolling in the SNAP E&T program.

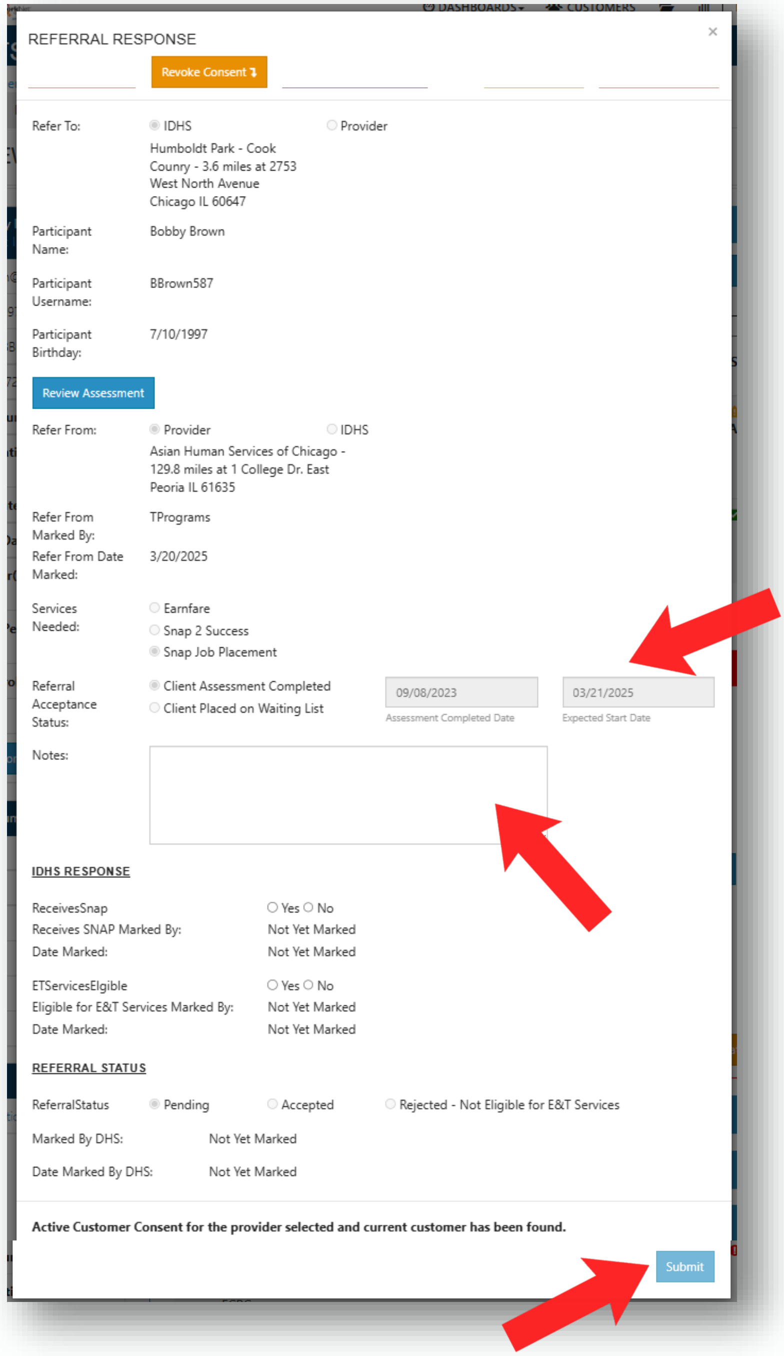
c) A box will open allowing you to upload the file.

d) Click “Choose File”, find the file on your computer, and add a description indicating what form you are uploading, and click “Upload”.





17. Click the “Client Assessment Completed” radio button and add the date the assessment was completed.
18. Add an expected start date.
19. Select the “Service Needed”. This is an indication of what program you are proposing to enroll the customer in.
20. Add any notes you deem appropriate.
21. Skip the “DHS Response” section and click the “Submit” button.



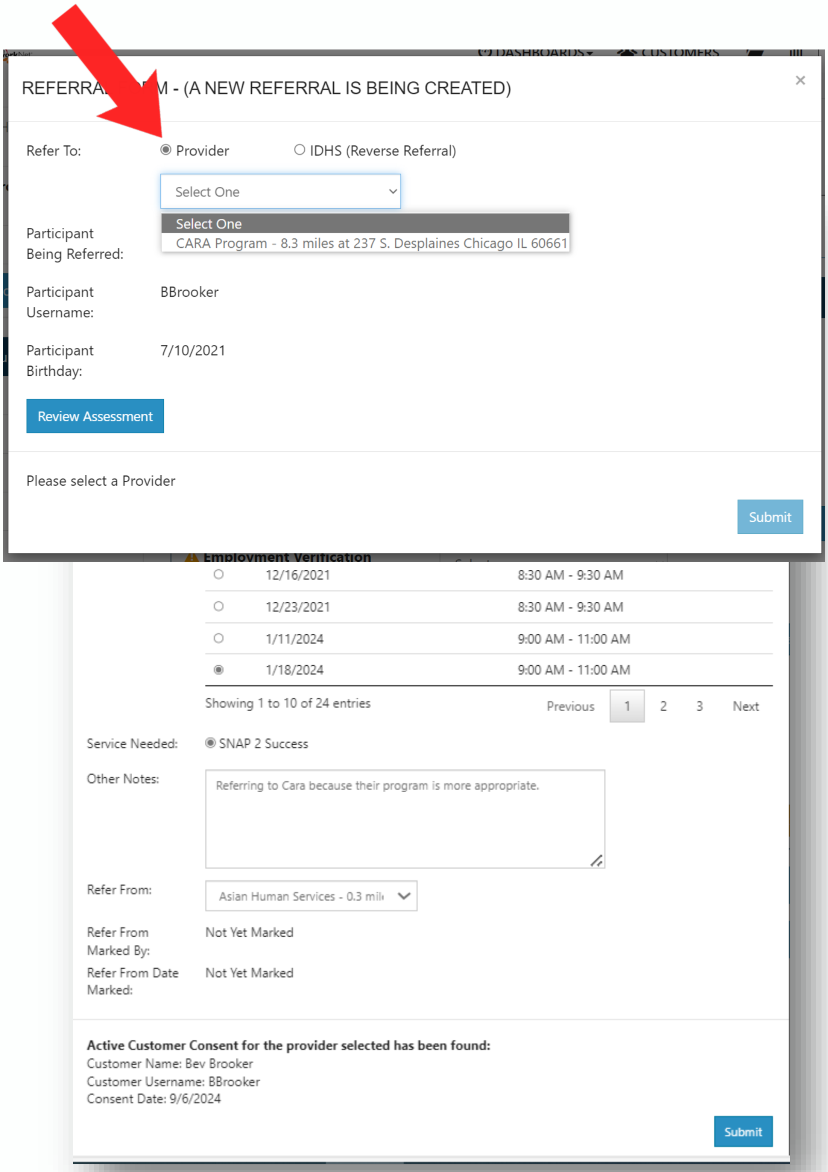
IDHS Workforce Development department is responsible for reviewing and responding to reverse referrals within 48 business hours. If your referral has not been processed or you have questions, please email your Provider Manager for assistance.

Earnfare Providers should send a new referral if a customer has completed their yearly participation and needs to start the program again.

Making Provider to Provider Referrals

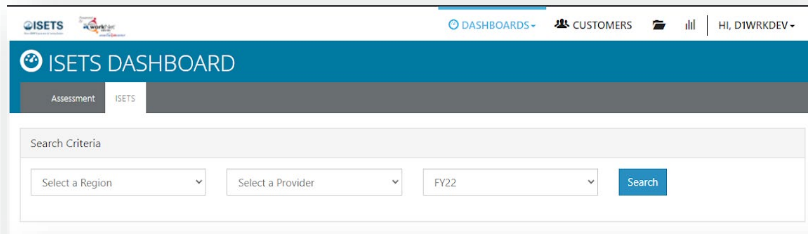
If you meet a customer who wants to participate in SNAP E&T but you do not offer services that meet their needs or interests, you may make a referral to another SNAP E&T Provider.

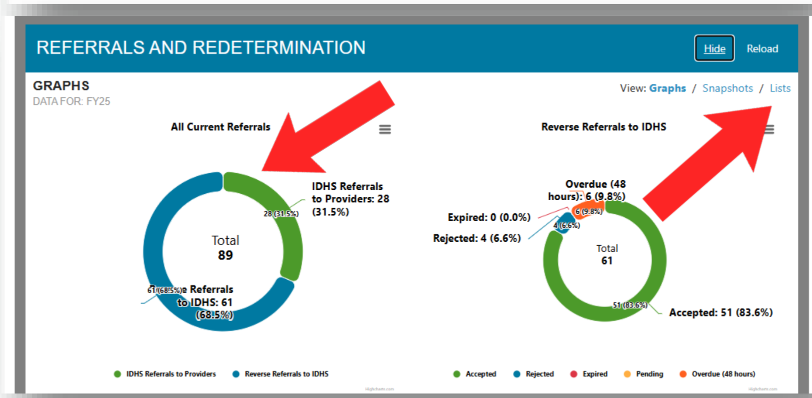
1. Click on the “Add Referral” button.
2. After clicking the “Add Referral” button, a window will pop-up with the Referral Form.
3. Click the radio button next to “Provider“ and choose the provider you’d like to make a referral to from the dropdown menu.
4. Submit the customer’s consent, as in other kinds of referrals.
5. Choose an intake appointment if one is available.
6. Choose the Service Needed.
7. Write some notes about why you are making the referral.
8. Select your own agency from the “Refer from” drop down menu.
9. Click Submit.

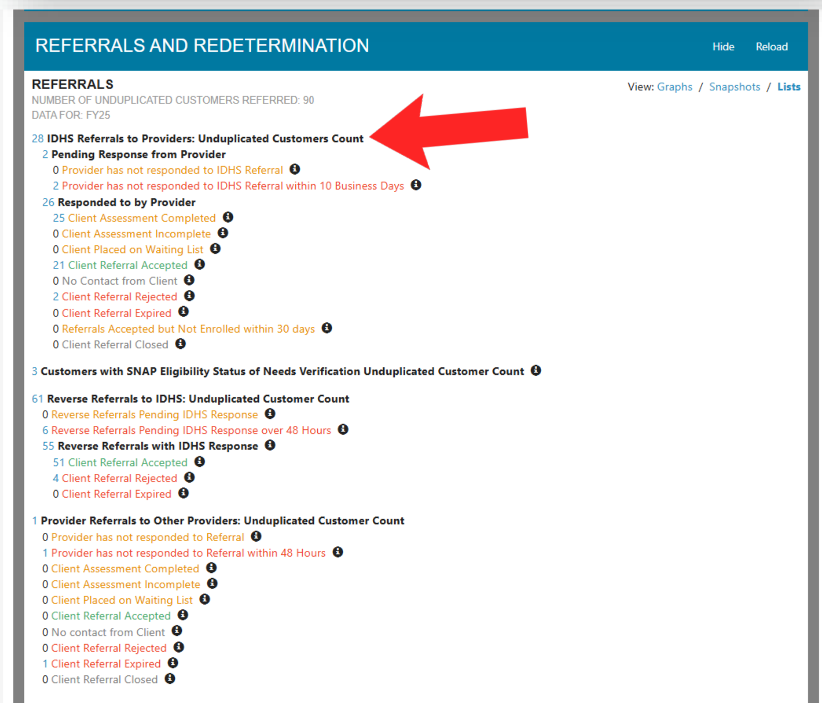


Processing Referrals from IDHS

Referrals should be reviewed and the customer contacted within 48 hours. Providers have 5 business days to process IDHS referrals. Referrals expire after 60 days and may count against you in program performance reviews.



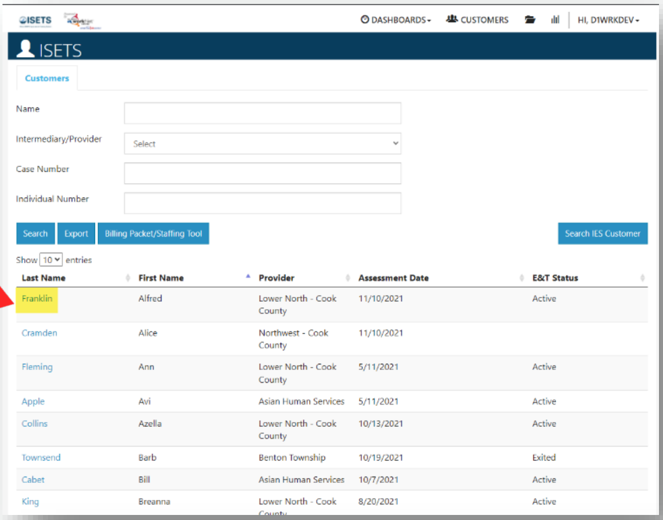




1. Customers who have been referred from IDHS may be found from the dashboard list. Providers also receive a daily summary email of all pending referrals. Provider Managers receive a weekly email summary of all pending referrals per Provider.
2. To access customers from ISETS Dashboard, click on the 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” or click the “IDHS Referrals to Providers” graph to see detailed items.
5. Click the number by the row of customers you want to review. i.e. referrals pending a Provider response. These are customers who have been referred to you that require a response.

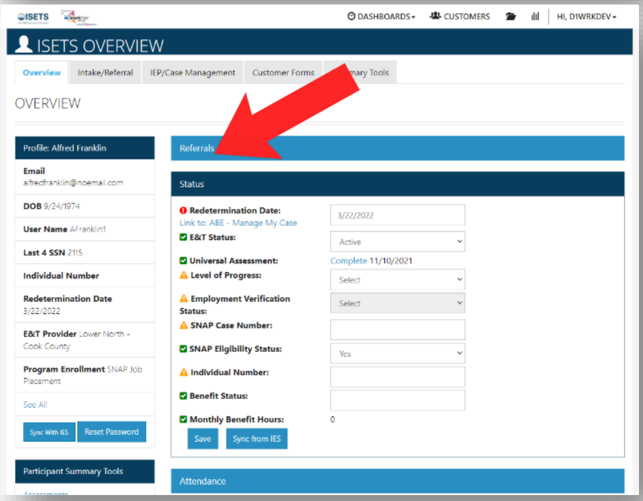
5. A new tab will open with the list of customers.

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

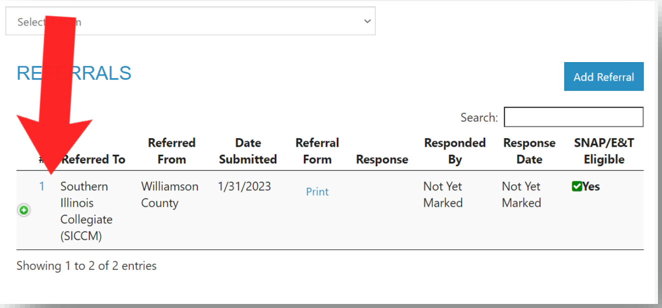


8. From the Overview tab on the customer profile, check the E&T Status, the SNAP Status, the Redetermination date that were all synced from IES.

9. Select the Referrals section (the first section in the Overview) and a list of referrals will unfurl.

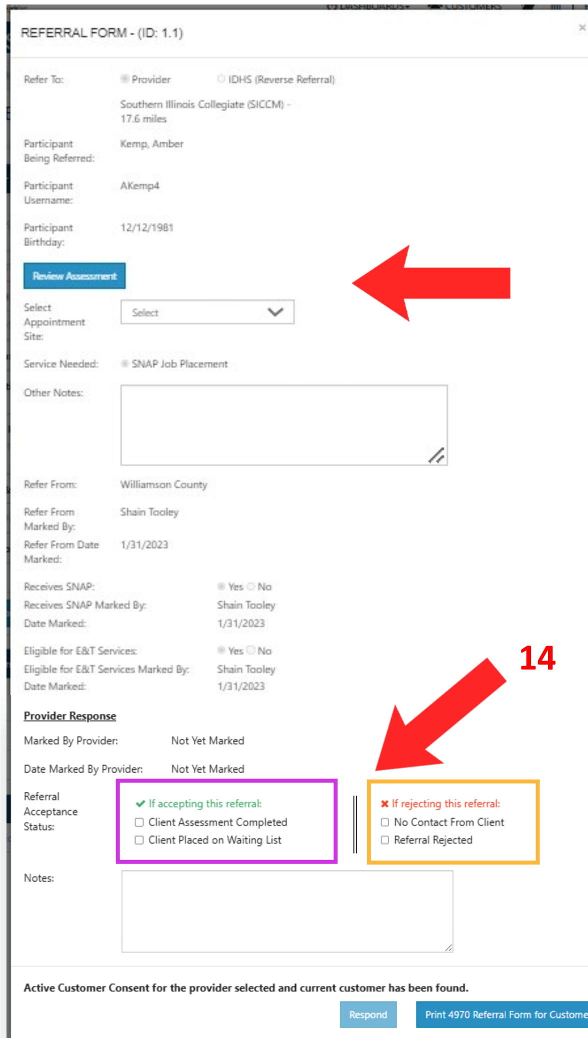


10. Click on the blue number to open the referral versions. *click on the + to see all historical versions of the referral listed.



11. Review the information in the referral.
12. You also have the option to review the assessment by clicking on the "Review Assessment" button.
13. Select the Appointment site where you will perform intake for this customer from the dropdown list.
14. Select an option for either Accepting or Rejecting the referral.

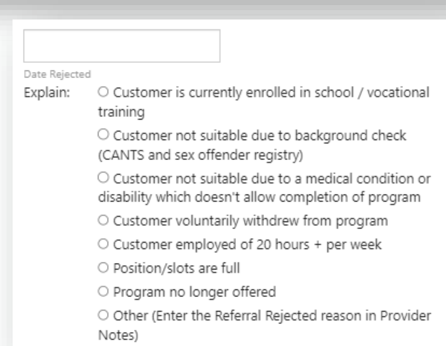
The section highlighted in purple lists all options which constitute accepting the referral. The section highlighted in yellow list all options which constitute rejecting the referral.



Best Practice

Review a customer's assessment for a clearer picture of who they are and whether they are a good fit for your program before attempting to contact them.

15. If accepting, two fields will appear: Assessment Completion date and Expected start date. Make sure those dates are correct. *Note: this date is what constitutes an acceptance for the customer. It means that you need to contact the customer to determine what their orientation/start date will be before filling in this date.
16. If rejecting, choose either "No Contact" and/or "Referral Rejected" and select the reason and enter the rejection date.
17. Click Respond.



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.
- **Expired**: this customer's referral was not responded to within the allotted timeframe and needs to be either reworked or closed by IDHS.
- **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.

All referrals with these various statuses can be seen in the dashboard. If you

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.

Referrals which are rejected by a Provider may be sent back to the FCRC or referred to another provider. Rejected or Expired referrals will be removed from Provider view to protect the confidentiality of customer information.

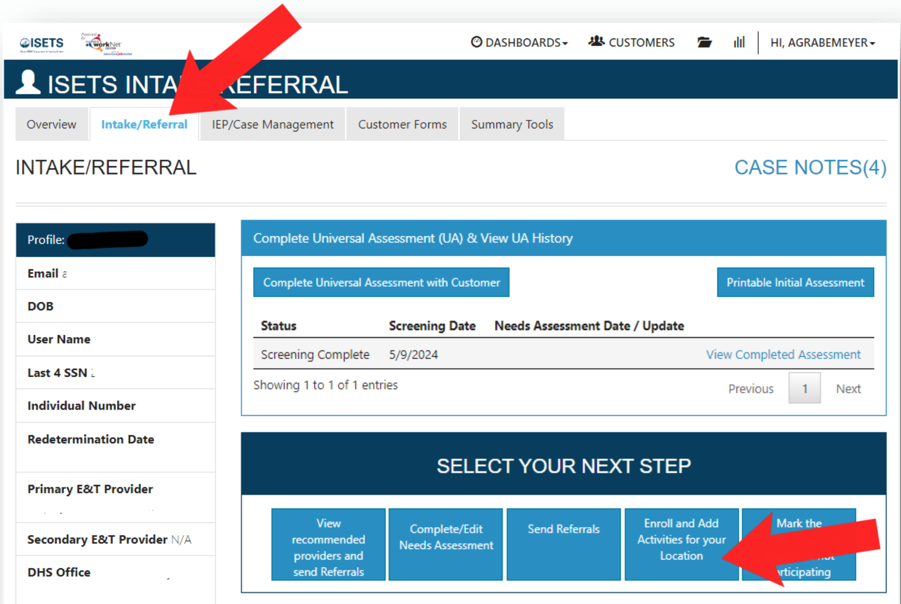
Customer referrals which have not been closed will automatically be closed regardless of the status (except for active customers) after 2 program years to protect the confidentiality of customer information.

Enrolling Customers

After assessment is completed and a referral accepted, you may officially enroll your customer in the program. In order to be included on monthly reporting for your agency, you 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.

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



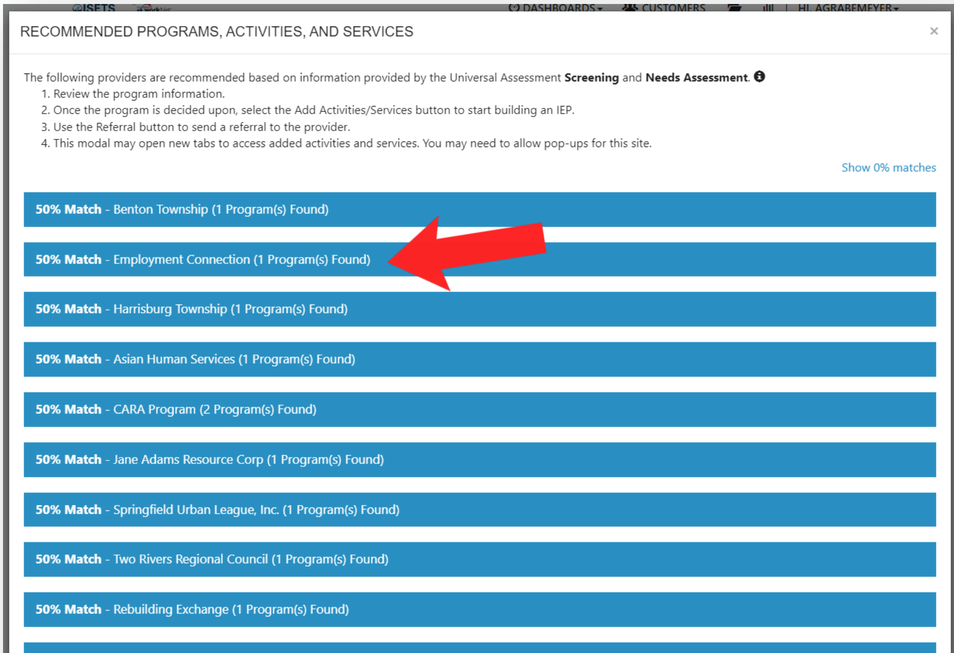
2. A box will pop open with "Recommended Programs, Activities, and Services". Find your agency in the list. If you don't see your agency, click on the "Show 0% matches" link in the upper right corner.

Best Practice

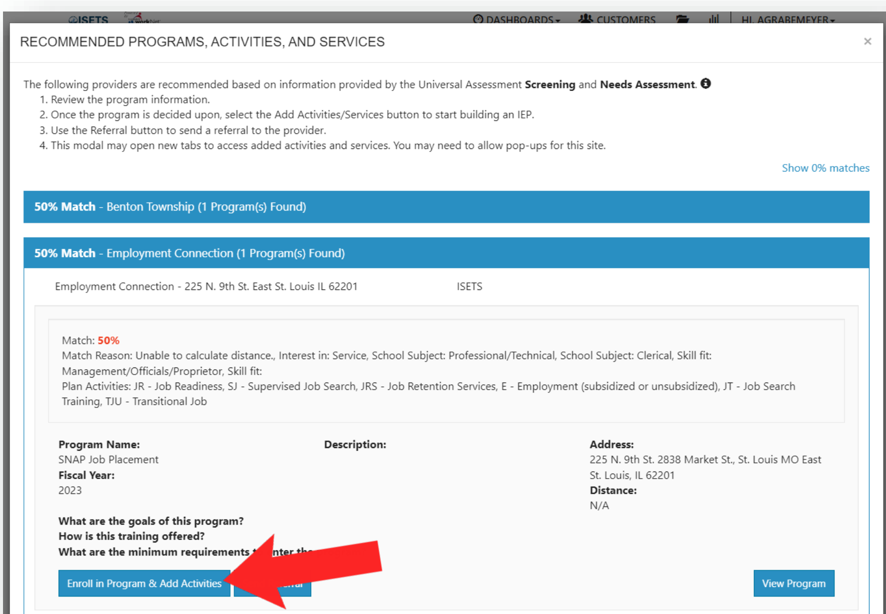
If you don't see your agency listed in the matches, it likely means either;

1. **Your agency isn't a good fit for this customer based on their assessment answers or**
2. **Your agency doesn't have enough information in the Provider Information section to match with customers.**

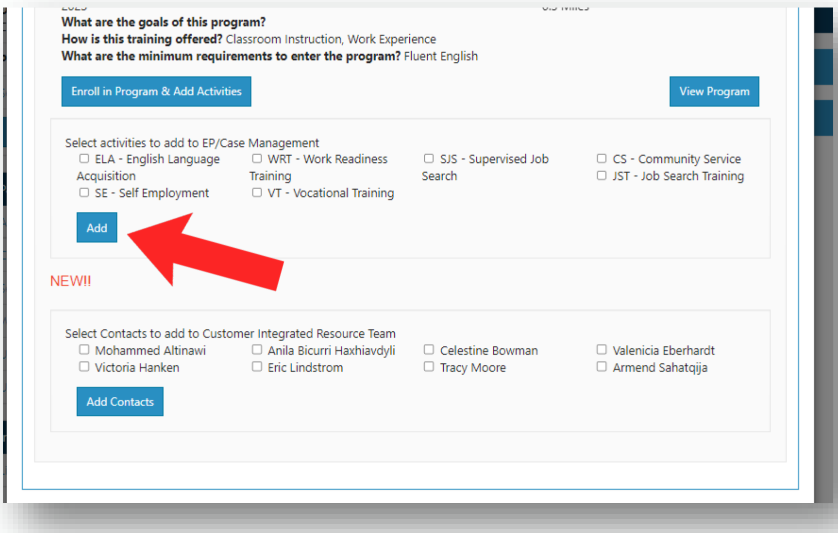
To remedy this, edit your Provider Information and add more details.



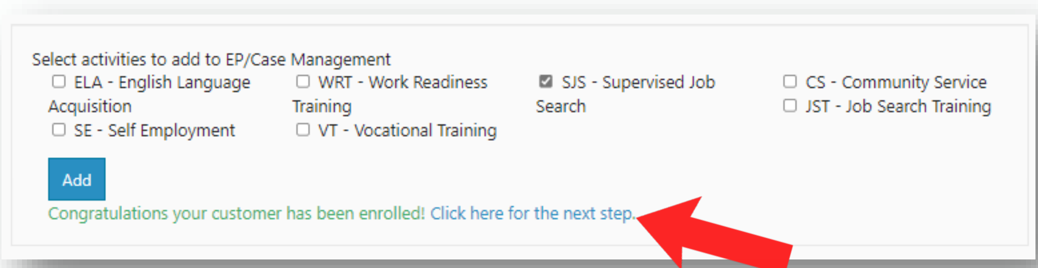
3. Click on the blue bar with your agency to expand the program details. If there are multiple programs, make sure you choose the correct one.
4. Click on "Enroll in Program & Add Activities".

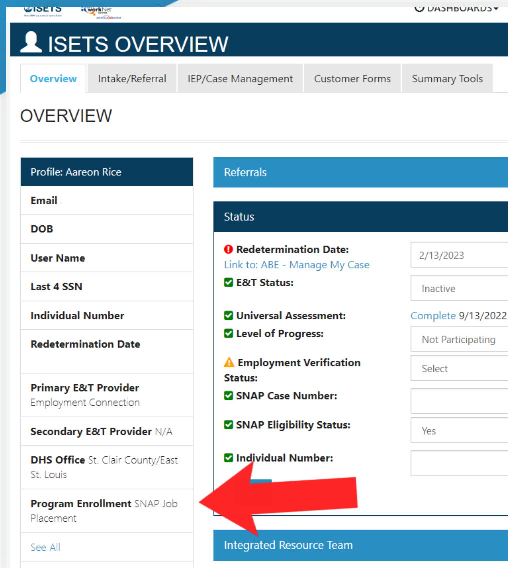


5. Choose the activities you will be engaging the customer in by checking the boxes and click “Add”. Note: customers must be enrolled with at least one SNAP Activity prior to Job Retention. You may also add contacts to the customer’s Integrated Resourse Team at this time.



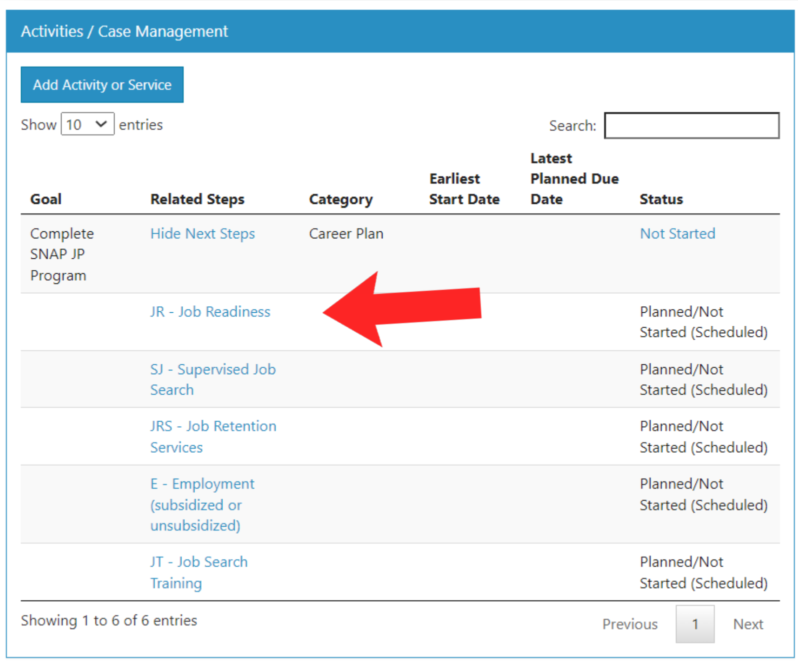
6. You will see a success message like the one below. Click on the blue text to link to the next step. This will take you to the customer’s EP (Employment Plan).





7. Your customer should now have the program listed in their profile.

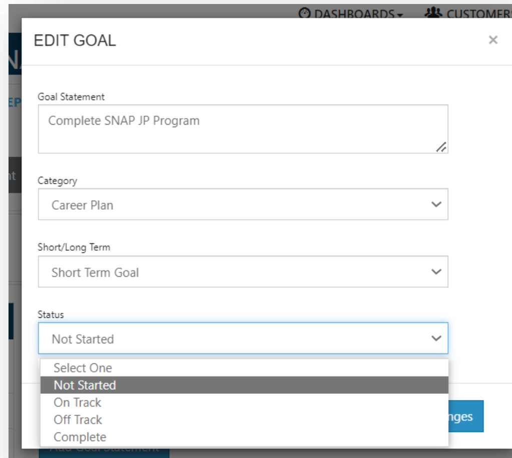
7. The activities you selected in the last step should now be added under the Activities/Case Management section of the Customer Overview.



Enrolling a customer also adds a default goal to the customer's EP. You can see in the above example the goal is "Complete SNAP JP Program". You'll notice that the goal's status is listed as "Planned/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 to be considered “Active”, an activity must have an “Open/Started” status on a SNAP E&T Activitiy and a start date.

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.

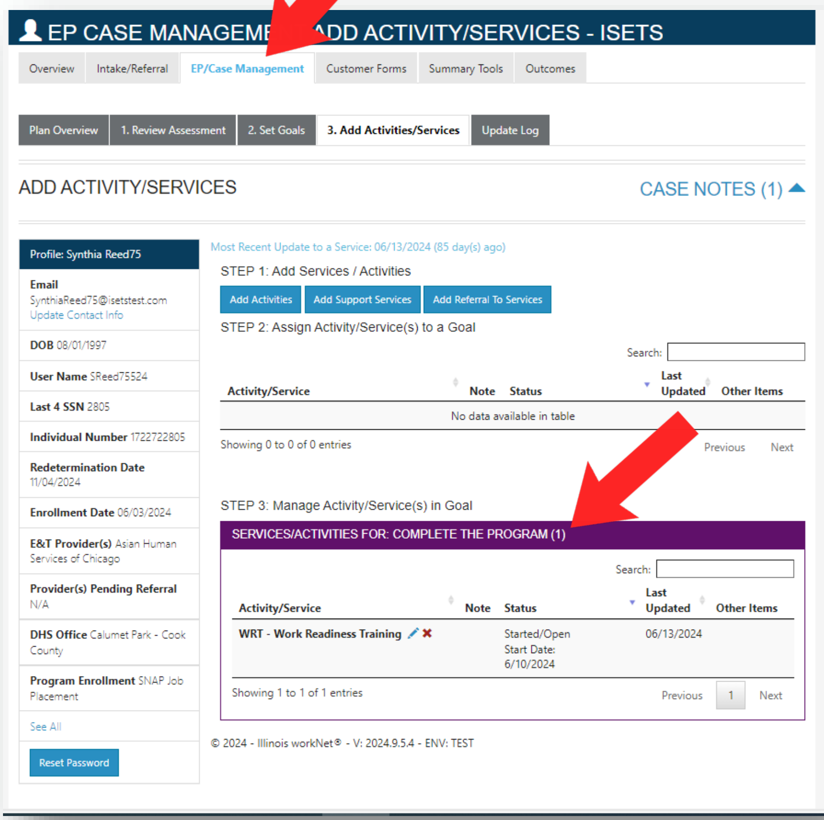
The only exception to this rule is if the exited customer finds employment with 60 days of exit which entitles them to Job Retention services (20+ hours/week). If this is the case, the customer may be un-exited and enrolled in the Job Retention activity. Customers enrolled in the Job Retention activity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

Employment Plans (EPs)

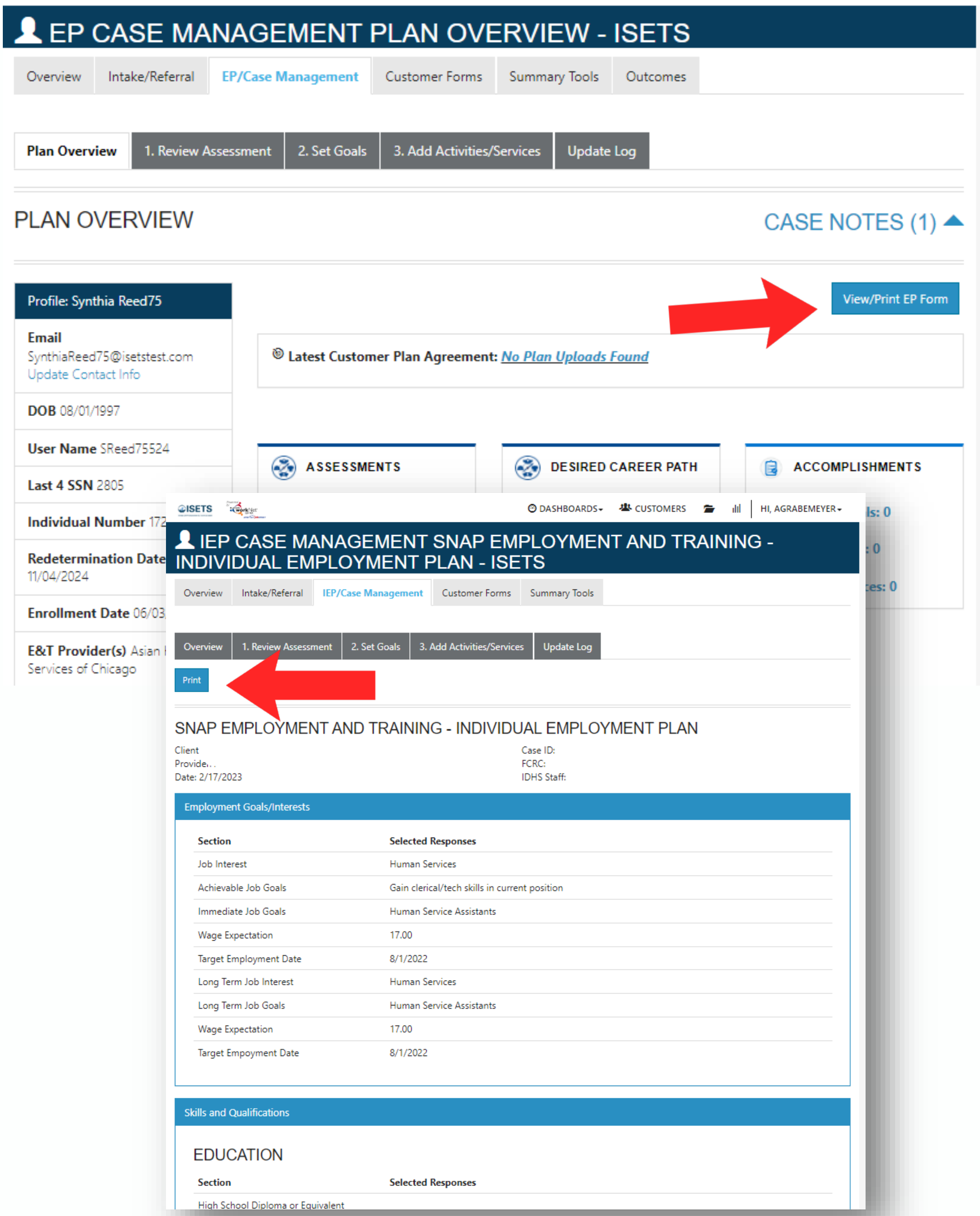
It is a requirement of SNAP E&T that each customer have an EP developed in collaboration with Provider staff. In performing the assessment and enrolling your customer, parts of the EP in ISETS will be auto-populated with some information. Adding additional long-term goals and adding activities (steps)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

1. 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.

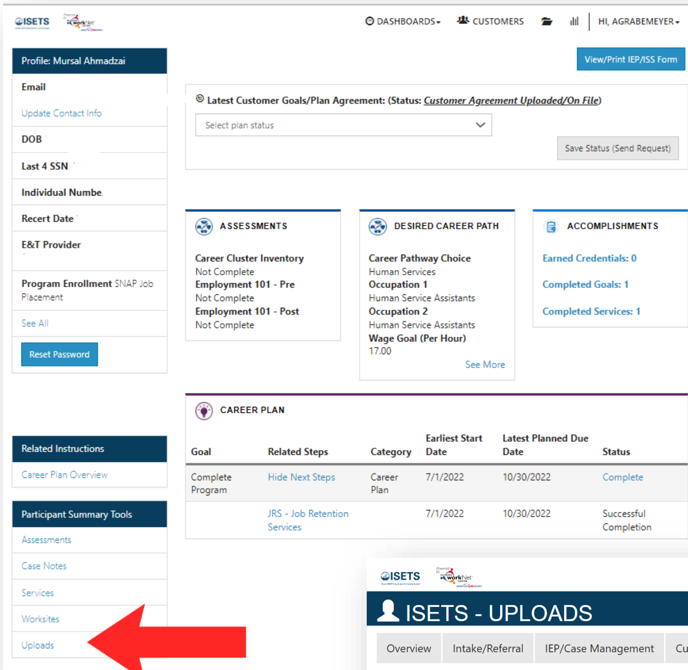
As previously stated in the [Enrolling Customers]() section, when a customer is enrolled into a program a default short-term goal to “Complete the (appropriate) Program” is automatically added to the EP to get you started. Any activities you chose to add to the EP upon enrollment is included under that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



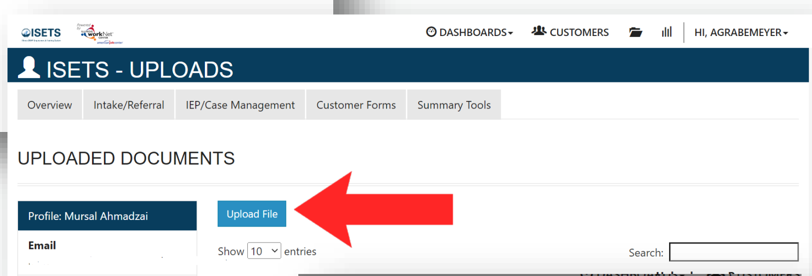
To print a copy of the customer Employment Plan, click on the Plan Overview tab and click on the “View/print EP Form” button. The current EP will generate a printable version in a new tab. Click the “Print” button at the top and have the customer sign it if you need a signed copy. You can then upload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

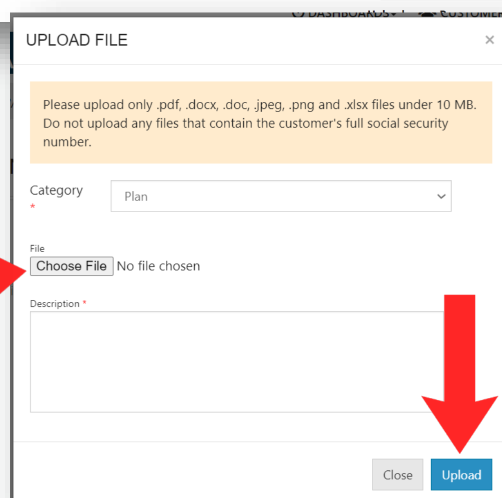


5. Once you have a digital copy of the signed EP you can upload it to the customer record. Do this by clicking on “Uploads” the “Participant Summary Tools” menu and then click on the “Upload File” button.



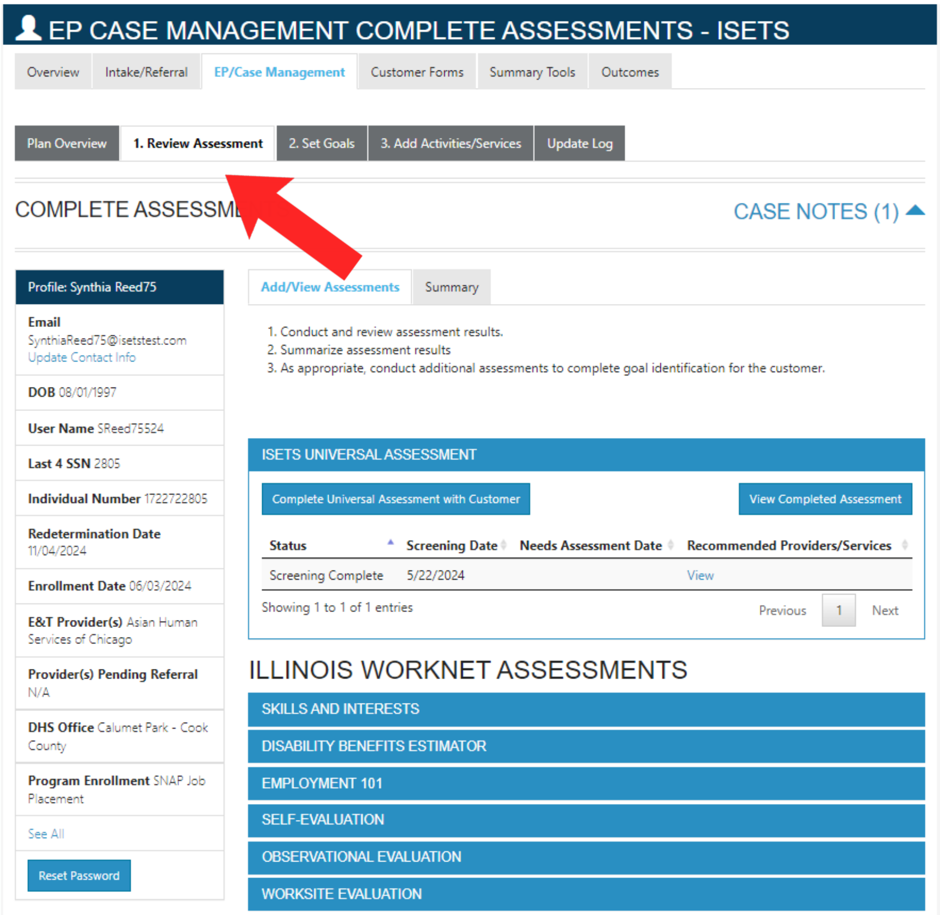
4. A popup page will load.
5. Click the dropdown menu and choose “Plan”.
6. Click the “Choose File” button and upload the correct file.
7. Click the “Upload” button.
8. Return to the tab with the EP page.
9. Click on the “Latest Customer Goals/Plan Agreement Status” dropdown and update if necessary.



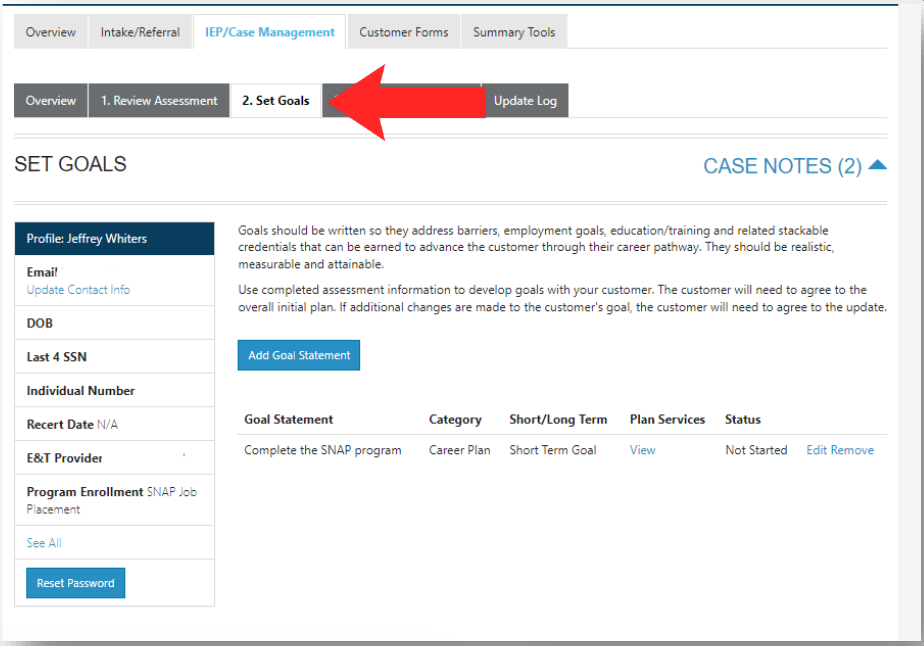


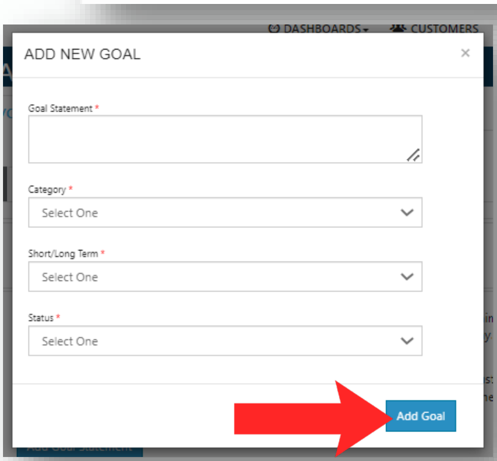
You will notice on the EP Overview page that all assessments are listed in the “Assessments” box. The “Desired Career Path” information is populated from the answers entered in the Universal Assessment. The “Accomplishments” box shows earned credentials, goals, activities and services which have been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

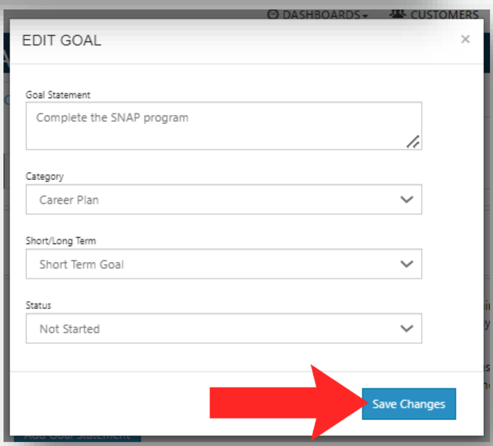
1. To view all assessments, click on the “Review Assessments” tab. The ISETS Universal Assessment as well as any other assessments available in ISETS are listed there. Some of these assessments are provided by Illinois WorkNet and are helpful but not required.



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.

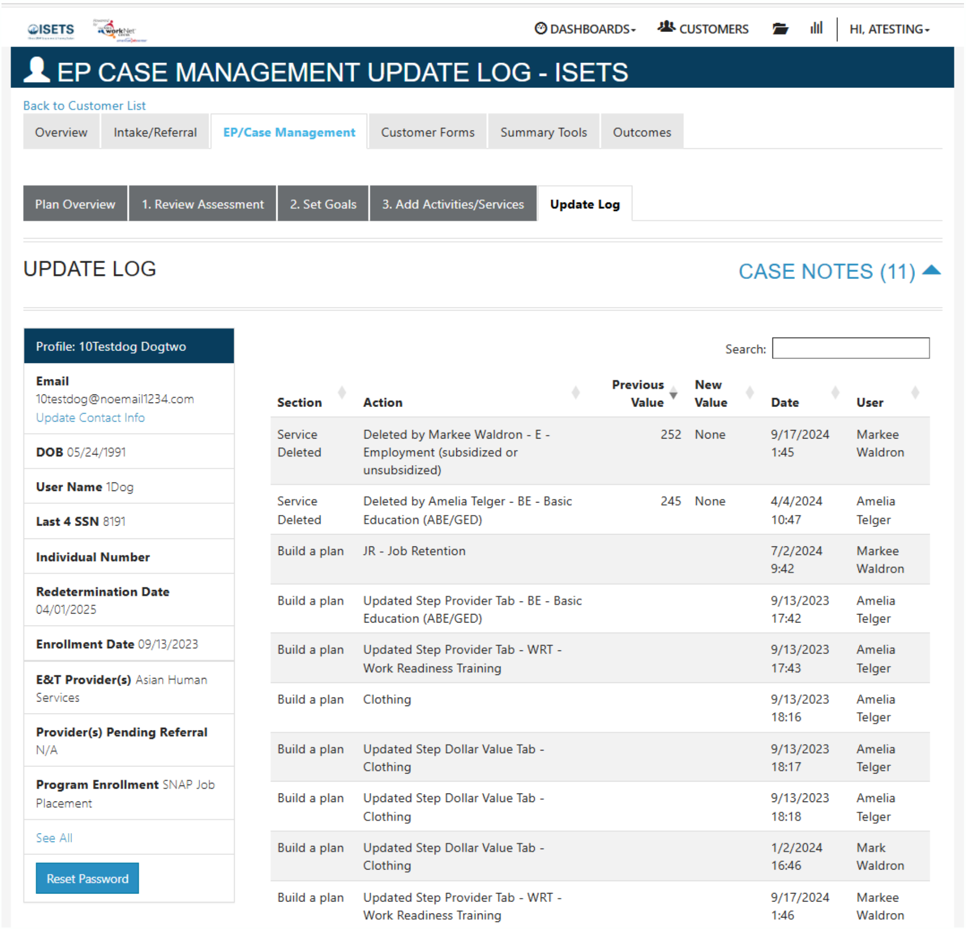

Overview
Intake/Referral
IEP/Case Management
Customer Forms
Summary Tools
Overview
1. Review Assessment
2. Set Goals
Update Log
SET GOALS
CASE NOTES (2)
Profile: Jeffrey Whiters
Email
Update Contact Info
DOB
Last 4 SSN
Individual Number
Recert Date N/A
E&T Provider
Program Enrollment SNAP Job Placement
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 *
Select One
Short/Long Term *
Select One
Status *
Select One
Add Goal


EDIT GOAL
Goal Statement
Complete the SNAP program
Category
Career Plan
Short/Long Term
Short Term Goal
Status
Not Started
Save Changes

Update Log

The Update Log is a record of changes made to the Employment Plan. If anyone adds, deletes, or makes changes to the Employment Plan most changes will be logged with the user and date. Use this record to help troubleshoot and understand changes to the EP.



ISETS DASHBOARDS CUSTOMERS HI, ATESTING

EP CASE MANAGEMENT UPDATE LOG - ISETS

Back to Customer List

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

UPDATE LOG

CASE NOTES (11)

Profile: 10Testdog Dogtwo

Email 10testdog@noemail1234.com
Update Contact Info

DOB 05/24/1991

User Name 1Dog

Last 4 SSN 8191

Individual Number

Redetermination Date 04/01/2025

Enrollment Date 09/13/2023

E&T Provider(s) Asian Human Services

Provider(s) Pending Referral N/A

Program Enrollment SNAP Job Placement

See All

Reset Password

Search:

Section	Action	Previous Value	New Value	Date	User
Service Deleted	Deleted by Markee Waldron - E - Employment (subsidized or unsubsidized)	252	None	9/17/2024 1:45	Markee Waldron
Service Deleted	Deleted by Amelia Telger - BE - Basic Education (ABE/GED)	245	None	4/4/2024 10:47	Amelia Telger
Build a plan	JR - Job Retention			7/2/2024 9:42	Markee Waldron
Build a plan	Updated Step Provider Tab - BE - Basic Education (ABE/GED)			9/13/2023 17:42	Amelia Telger
Build a plan	Updated Step Provider Tab - WRT - Work Readiness Training			9/13/2023 17:43	Amelia Telger
Build a plan	Clothing			9/13/2023 18:16	Amelia Telger
Build a plan	Updated Step Dollar Value Tab - Clothing			9/13/2023 18:17	Amelia Telger
Build a plan	Updated Step Dollar Value Tab - Clothing			9/13/2023 18:18	Amelia Telger
Build a plan	Updated Step Dollar Value Tab - Clothing			1/2/2024 16:46	Mark Waldron
Build a plan	Updated Step Provider Tab - WRT - Work Readiness Training			9/17/2024 1:46	Markee Waldron

Adding and Managing Activities

After you've enrolled a customer, you can add and edit activities. Activities are added underneath EP goals, therefore a goal must be added to the EP in order to add 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).

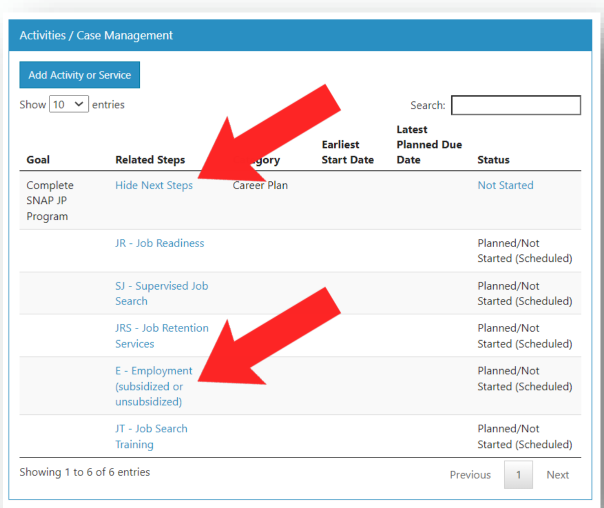
Best Practice

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 your customer completes an activity and moves on to a new one, you close out the old activity and add the new one to their EP.

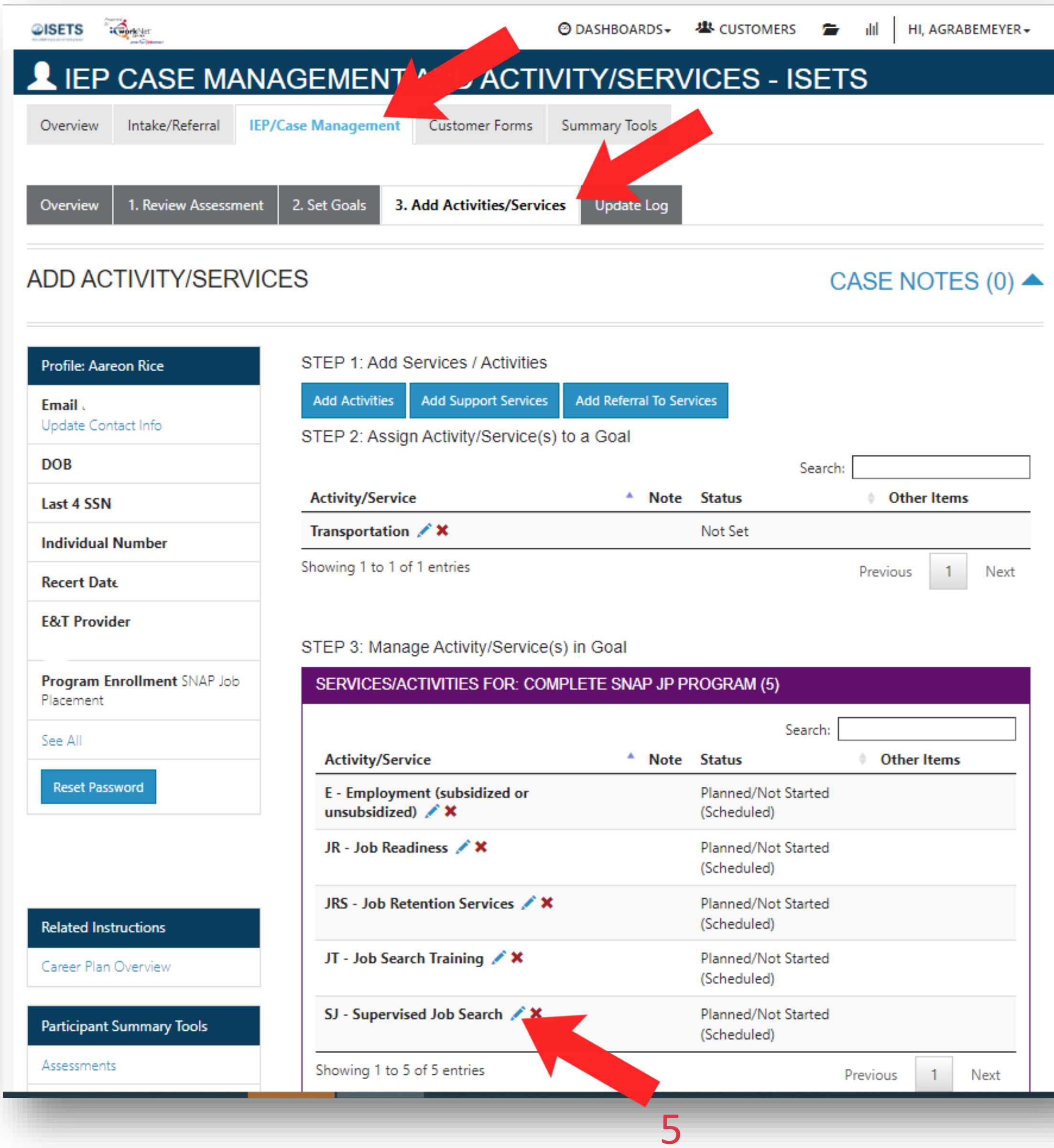
Each customer enrolled in SNAP E&T must be enrolled in at least one SNAP E&T Activity. In addition, a new SNAP E&T customer must be enrolled in a SNAP E&T Activity prior to starting Job Retention.

To edit this first set of activities:

1. View the existing Activities in the Activities section 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.



4. You can also edit activities by clicking on the "EP/Case Management" tab in the customer record, clicking on the "Add Activities/SupServices" 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.

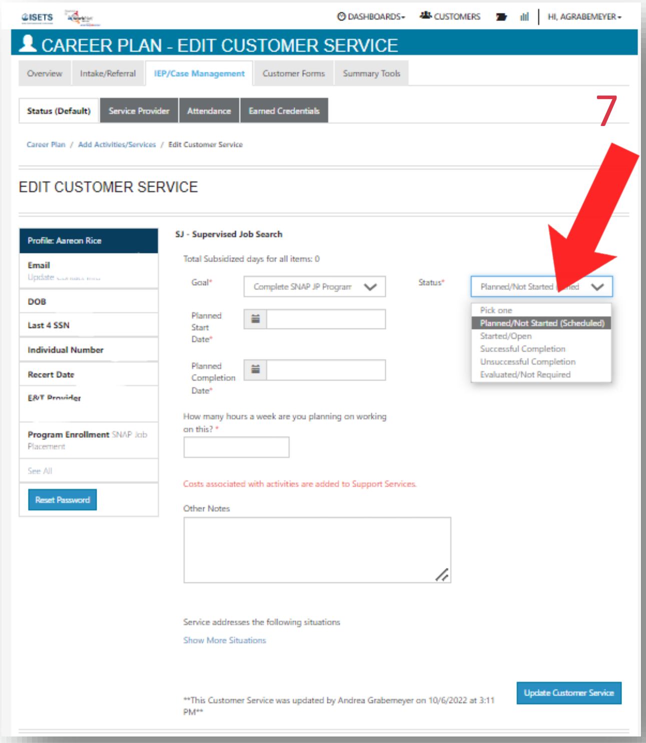


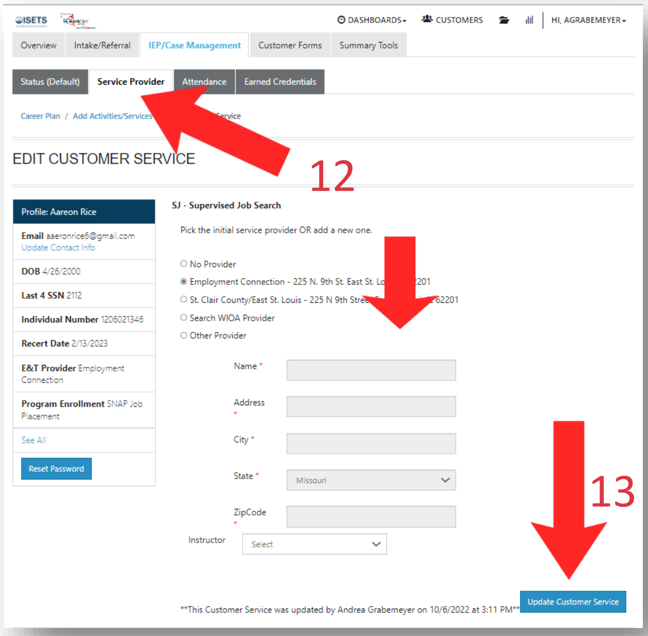
Any Supportive Service listed here which has a "$" icon in the "Other Items" column has a cost associated with it. There are also icons for Credentials earned and Attendance that my appear in this column as well.

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.

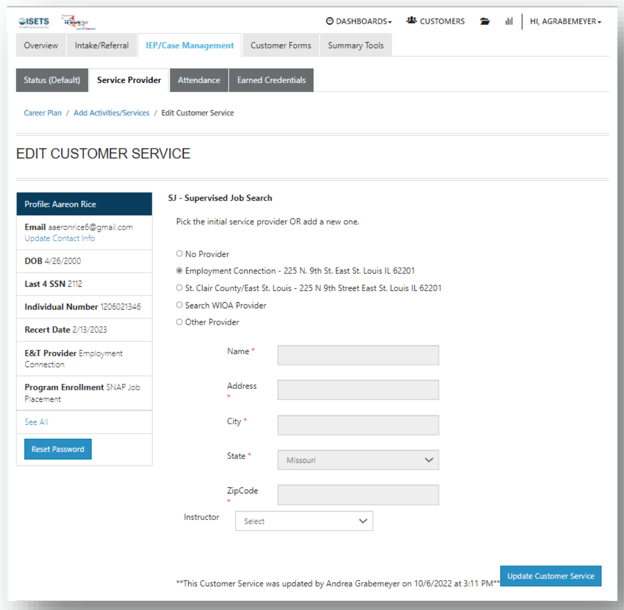
Providers are limited to start dates beginning the first of the month in which the customer was deemed eligible and enrolled.

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.





11. If the 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) you may search for that location in the WIOA Provider section or you may type in the information in the “Other Provider” fields.
12. Click “Update Customer Service”



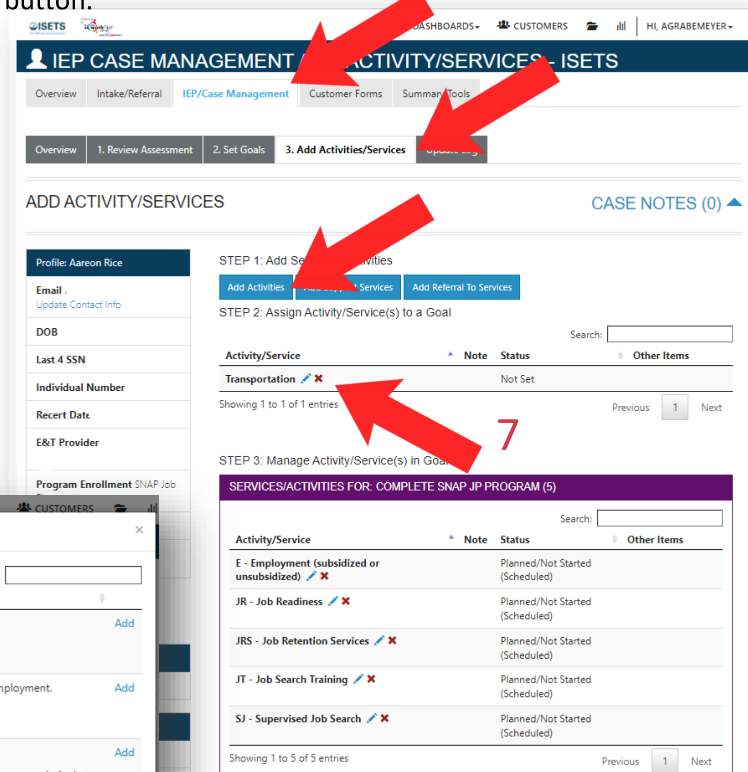
When adding, changing, or closing activities, this constitutes a change in the EP, which requires a case note. A case note pop-up screen will automatically appear when changes require a case note.

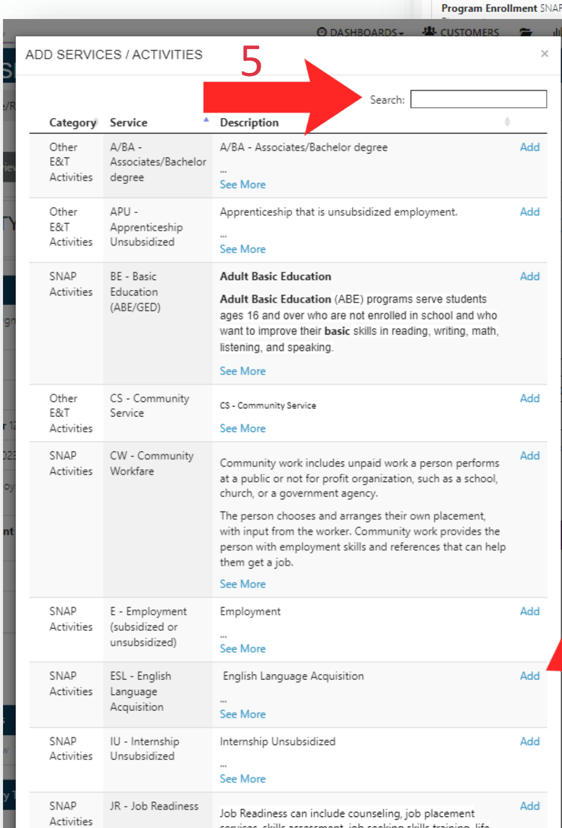
Best Practice

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 New Activities

1. You can add new activities by clicking on the EP/Case Management Tab in the customer record.
2. Click the “Add Activities/Services tab.
3. Click on the “Add Activities” button.
4. A pop up screen will load with a list of all activities.
5. To find a specific activity, 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 activity to the EP.

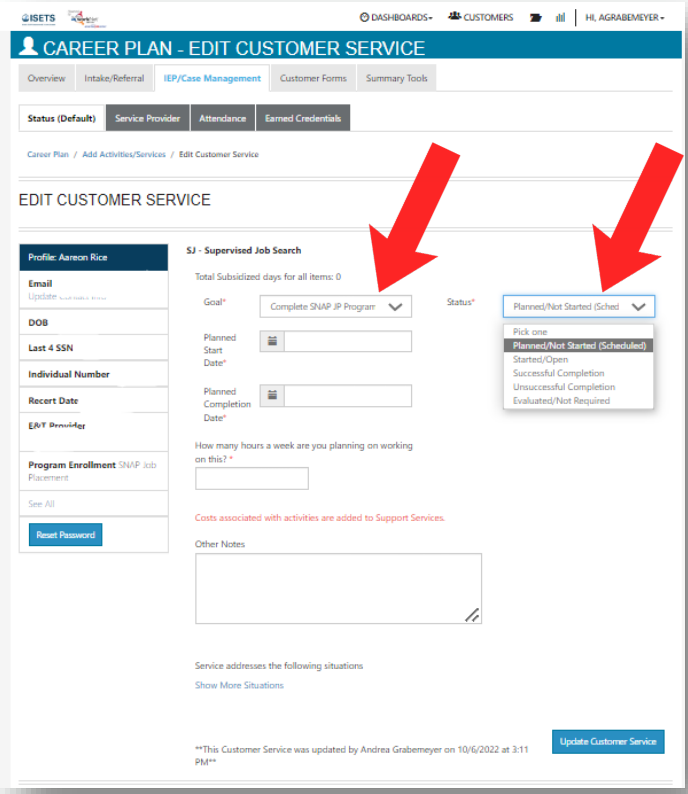


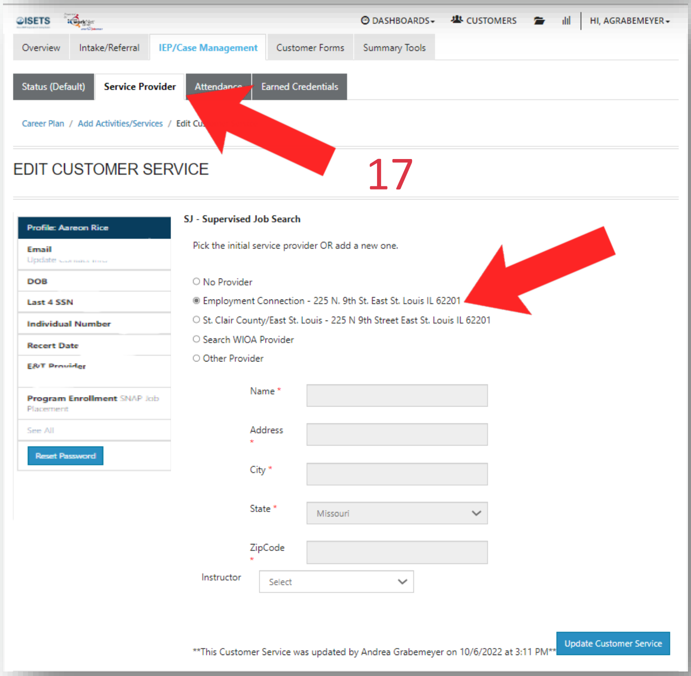


7. The activity will now show on the list at the top of the Activity/Service page.
8. Click the blue pencil icon.
9. A page will open where you can edit the new activity.

10. Click on the "Goal" dropdown and choose a goal to associate this activity with. To open an activity, it must be associated with a goal.
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).
14. Enter how many hours you are planning on engaging this customer in this activity.
15. Add any Other Notes describing the activity.
16. Click on the "Service Provider" tab and make sure your agency is selected as the Service Provider. If this customer is attending this activity at another location, you may choose that location or enter one here.
17. Click on the "Update Customer Service" button.

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

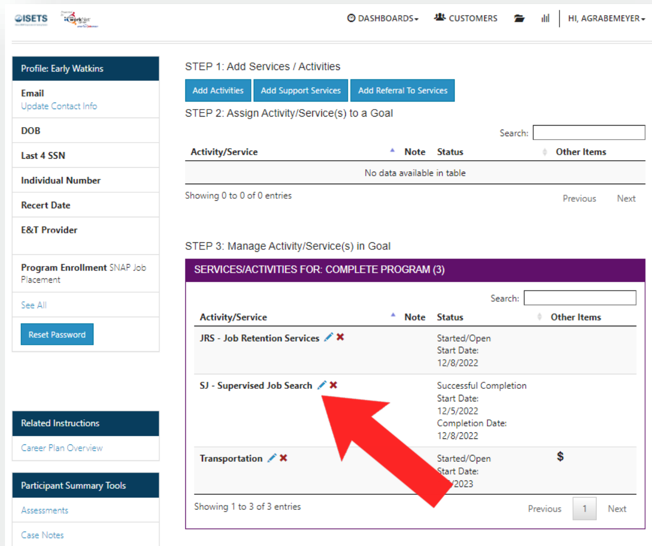


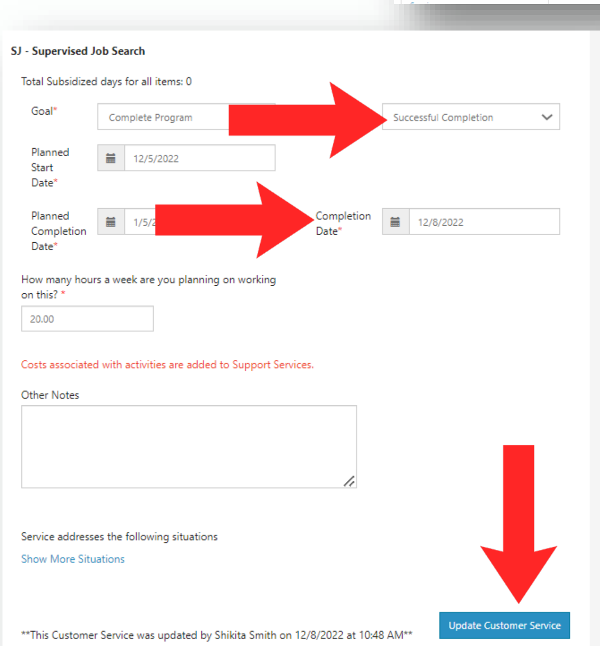


Closing Activities

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.

1. Click the "Add Activities/Services tab.
2. Click on the blue pencil icon next to the activity to edit the activity.
3. Change the Status to "Successful Completion" or "Unsuccessful Completion", whichever is appropriate.
4. Add the actual "Completion Date" (this can be the exit date if the customer is exiting the program).
5. Click the "Update Customer Service" button.





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.

Worksite Placements

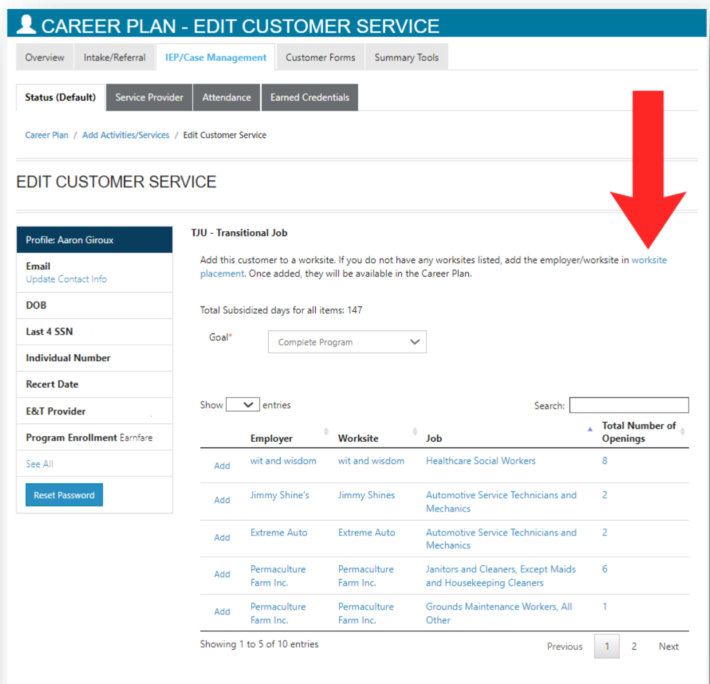
When a customer is enrolled in a work experience activity such as:

- Community Workfare (SNAP E&T Activity)
- Transitional Job (SNAP E&T Activity)
- On the Job Training (SNAP E&T Activity)
- Internship (SNAP E&T Activity)
- Apprenticeship (Other Activity) or
- Pre-Apprenticeship (Other Activity)

The activity will prompt you to add a worksite placement. Worksites are added separate from Employers. Work Experience is different from employment placements as these are not traditional/permanent employment (an outcome) but are a part of the SNAP E&T program.

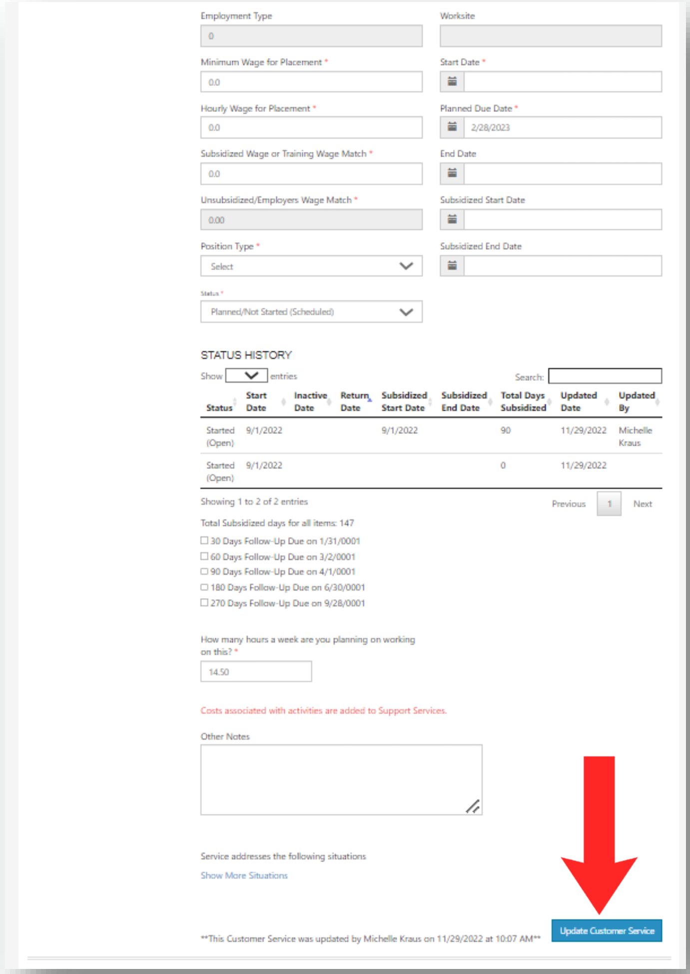
After adding the Activity as described above, you will see a screen like the one to the right.

1. Click on the "Goal" dropdown to associate the activity with a goal.
2. Click the blue "Add" text next to the available worksites for your organization to add the worksite to this activity.
3. Click on the blue linked text for the Employer or Worksite to edit the Worksite.
4. Add the "Planned Due Date".
5. Click the "Update Customer Service" button.



Worksites are added to your organization or edited either by clicking on the blue "worksite placement" text at the top of the activity or by going to your agency's Provider Information, selecting the "ISETS Provider Details" tab and scrolling down to the "Worksites" section (described in [Viewing and Editing Provider Information](#) in this manual).

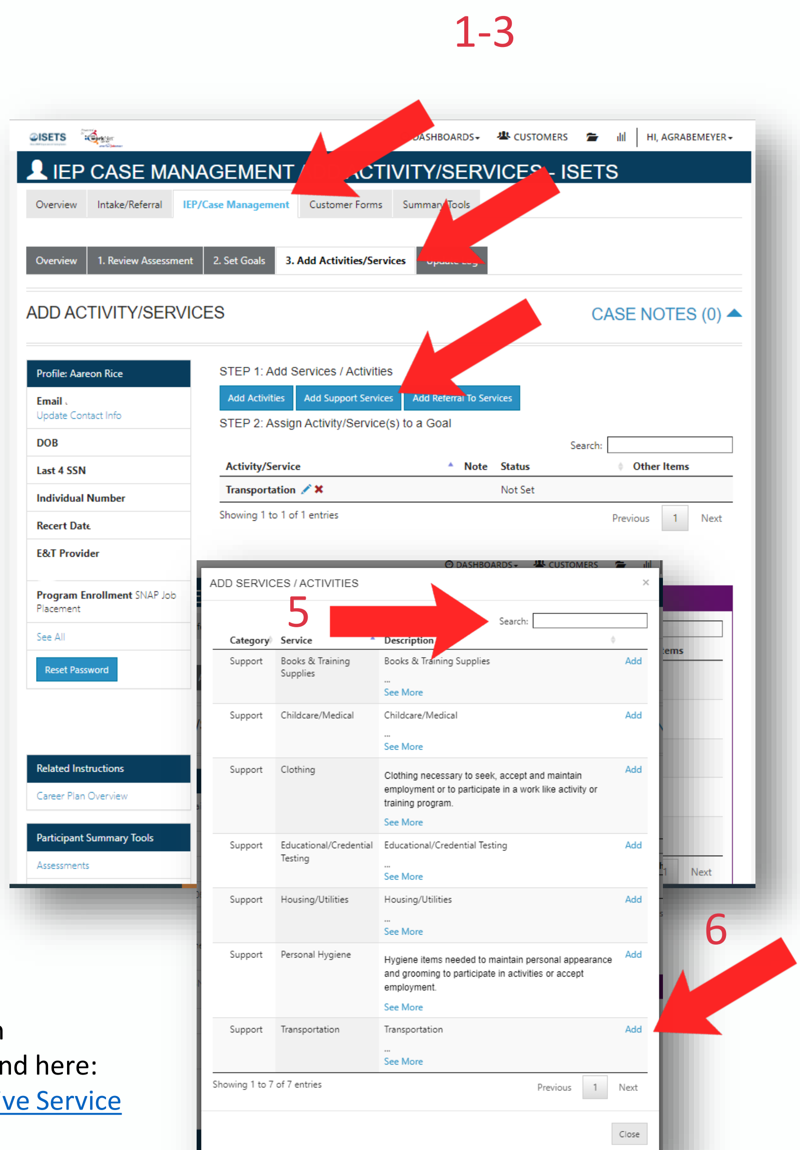
7. Fill in all details of the worksite placement including start date, wage, planned due date (end date), and position type.
8. Update the “Status” dropdown to “Started/Open”.
9. Add the number of hours the customer is planning to participate in the worksite in whole numbers (no dashes or ranges).
10. As the follow-up dates occur, contact the customer and worksite and check those boxes.
11. Add any Other Notes relevant to this worksite placement.
12. Click the “Update Customer Service” button.



Adding and Managing Supportive Services

After you've enrolled a customer, you 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.

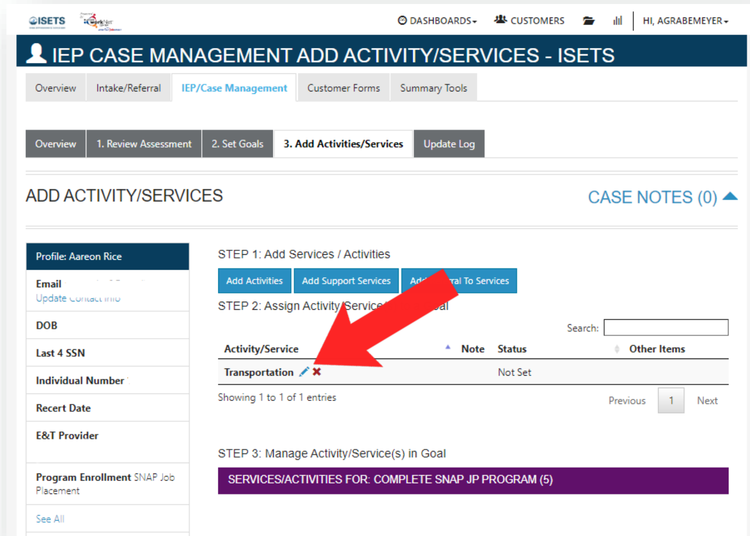
Costs can also be added underneath supportive services where costs are not added under activities. Costs should be added and dated within the month the service is issued/happens. Customers are only eligible to receive Support Services while they are enrolled and active in a SNAP E&T Activity, therefore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

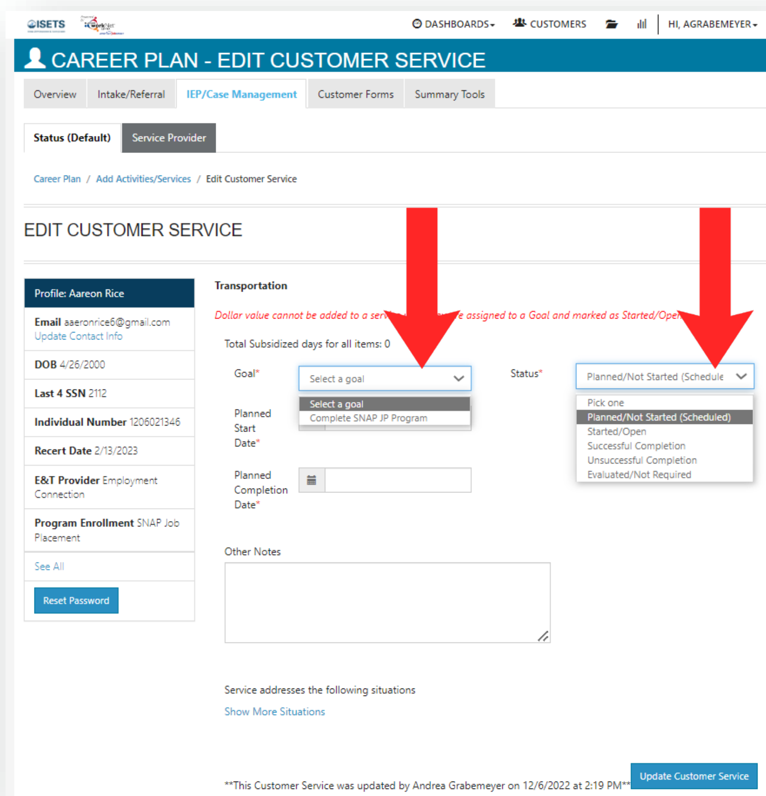


1. You can add new services by clicking on the EP/Case Management Tab in the customer record.
2. Click the "Add Activities/Services tab.
3. Click on the "Add Support Services" button.
4. A pop-up screen will load with a list of all services.
5. To find a specific service, you can type keywords in the 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.

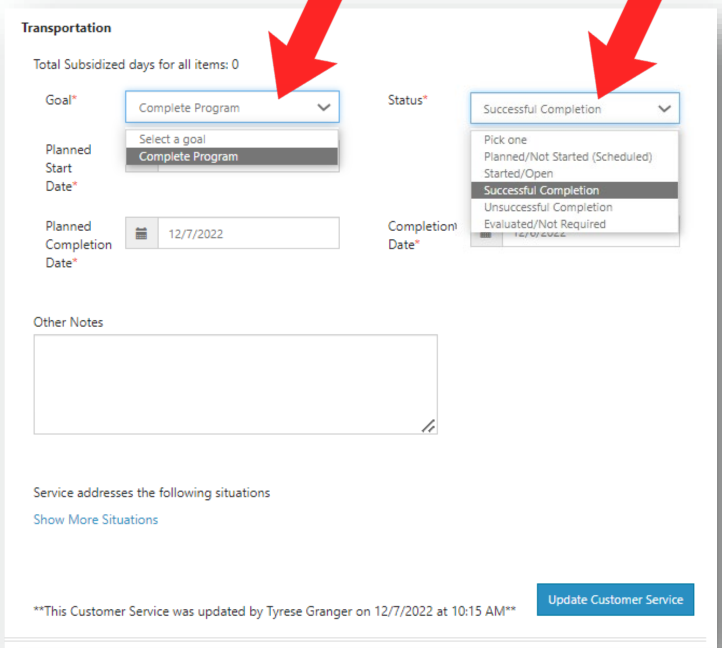
The official published policy on supportive services can be found here: [IDHS: WAG 21-06-11: Supportive Service Payments (state.il.us)]

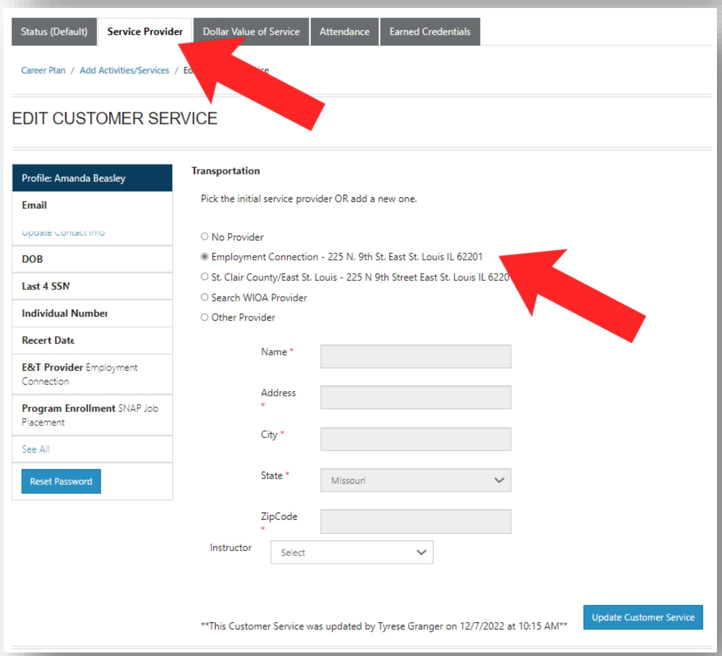
7. Click the blue pencil icon.
8. A page will open where you can edit the new service.
9. You'll notice that a new service not associated with a goal will display the message "Dollar value cannot be added to a service until they are assigned to a Goal and marked as Started/Open".
10. Click on the "Goal" 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).





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 your agency is selected as the Service Provider.

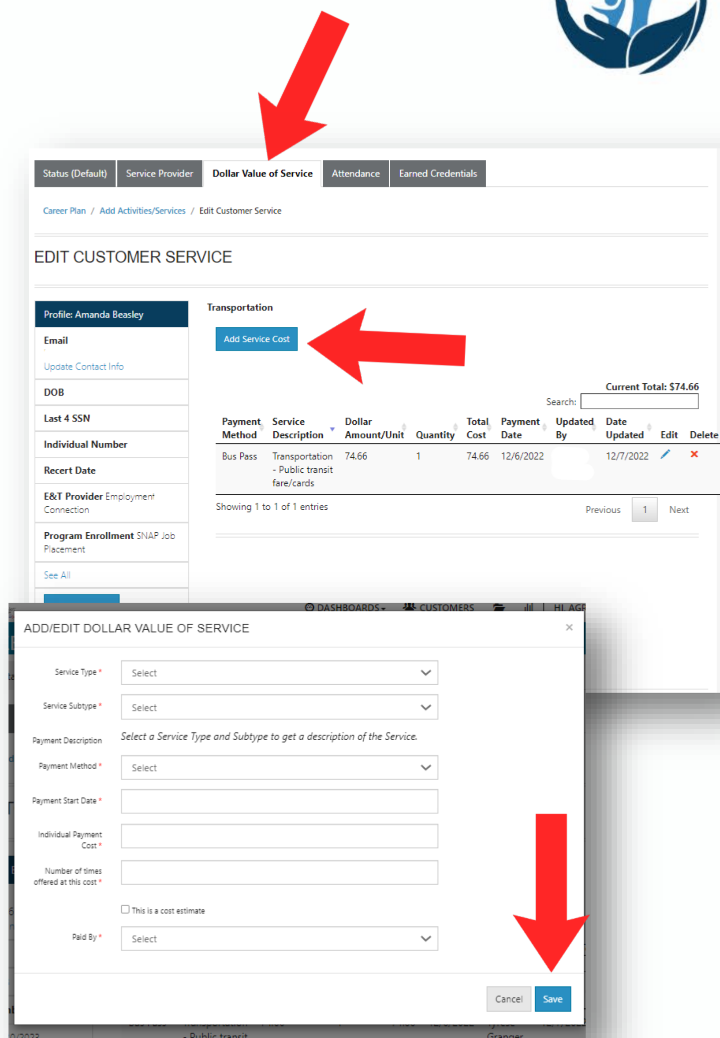




Adding Costs to Services

1. Click on the "Dollar Value of Service" tab
2. Click the "Add Service Cost" button.
3. A pop-up window will load.
4. Add the "Service Type" and "Service Subtype" from the dropdown menus.
5. Enter the "Payment Method" (bus pass for example).
6. Enter the "Payment Start Date" (usually the date you gave the supportive service on). If the service is a monthly bus pass, for example, add the date the bus pass was given to the customer.
7. Enter the "Individual Payment Cost" (for example: a single monthly bus pass might cost $75)
8. Enter the number of times you gave them the pass (usually 1).
9. Enter what source the service was paid by. Usually "Grant".
10. Click the "Save" button.

If a customer exits SNAP E&T, all Services remain open.

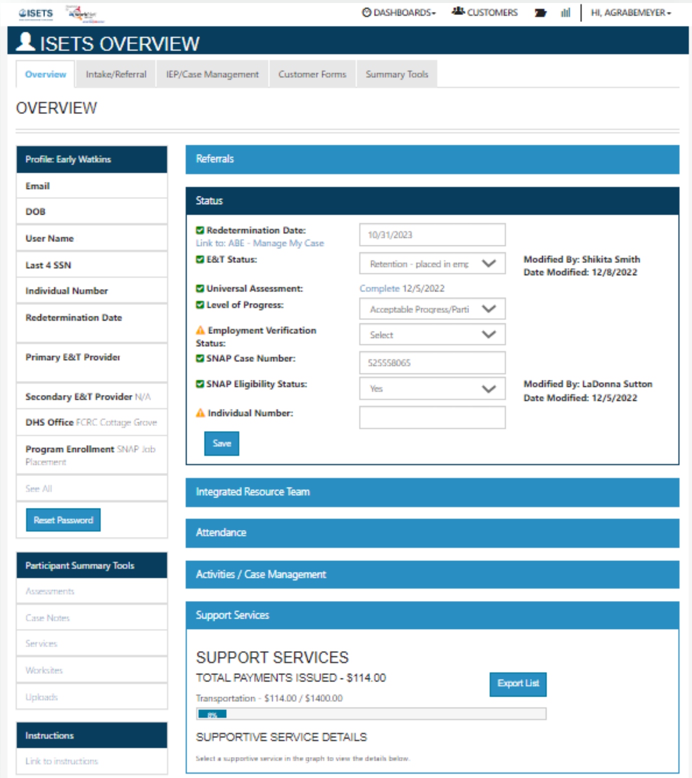


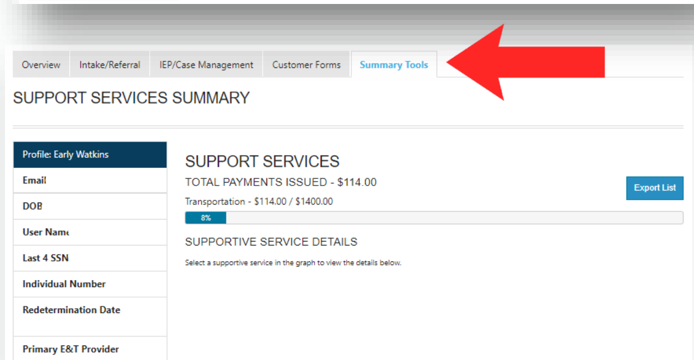
Best Practice

The Supportive Service is only added once for the entire period of time the customer is participating in SNAP E&T. Even when a customer exits the program their Services remain open in case they come back – we want annual cost limits to be applied correctly in this case. When supportive service payments (bus passes, gift cards, direct payment, etc.) are made each one is entered as a new service cost.

Viewing Supportive Services
Supportive Services can either be viewed in the "Support Services" section in the Overview of the customer record or by clicking on the "Summary Tools" tab in the customer record.

In both cases the service category (ie. transportation, clothing, etc.) will be listed and the total amount the customer has received (per FY) will be shown. The percentage of the total allowable (yearly) will also be shown so you can determine how close the customer is to reaching the maximum allowable amount for this service.





In both cases, if you click on the graph, all support services under that category will expand and be listed below so you can see the details.

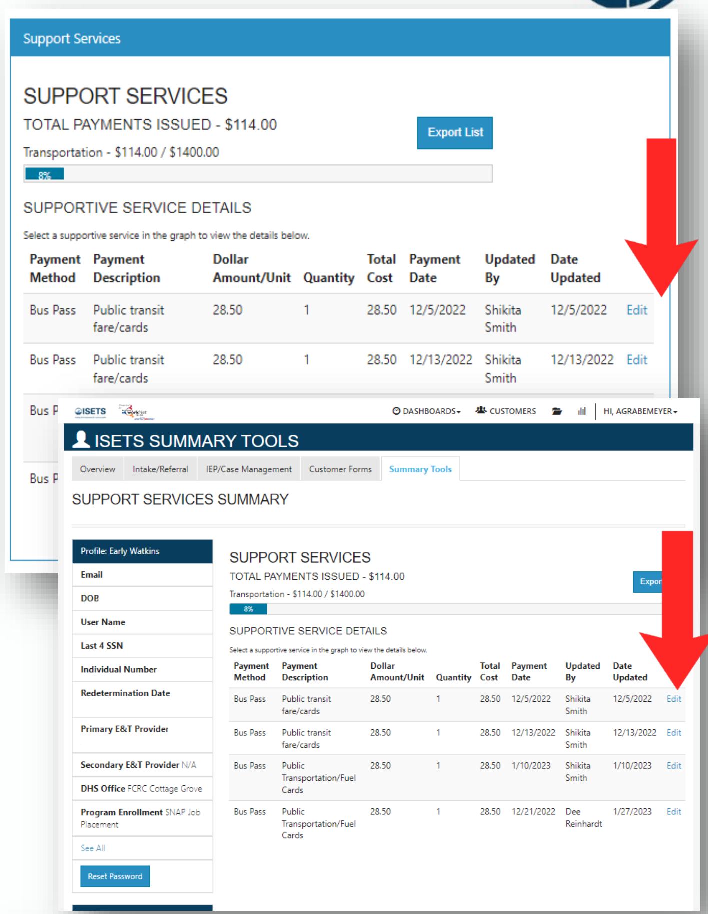
Best Practice

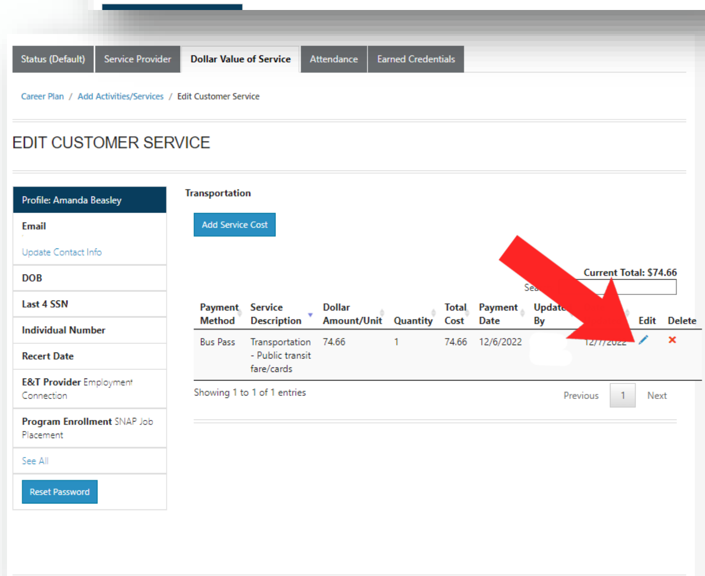
If a customer gets close to the maximum allowable amount for a supportive service, it is a good idea to notify the customer and make plans for how you will either discontinue the service or request approval to exceed the maximum.

Exceeding the maximum is not automatically disallowed, however you must request a Service Cost Override and make the case that the service is reasonable and necessary for the customer to succeed in their goals.

Editing Costs to Services

1. To edit a cost to a service you must first open the service. You can do that from the “EP/Case Management” tab on the customer record and click on the “Add Activities/Services” tab.
2. Alternately, from the customer record Overview tab, you can click the Support Service graph and display all of the details for that service.
3. There will be a blue “Edit” text on the right which will allow you to edit that cost.
4. This is also true from the Summary Tools tab.
5. Any of these methods will open the service where you can edit the dates of service, the Service Provider, or the Dollar Value of Service (to edit a cost or to add a new cost).
6. In the “Dollar Value of Service” tab, view the list of previously added service costs.
7. Click on the blue pencil icon to edit that cost.
8. Add additional distributions by clicking the “Add Service Cost” button and repeating steps mentioned for the initial addition of a cost.



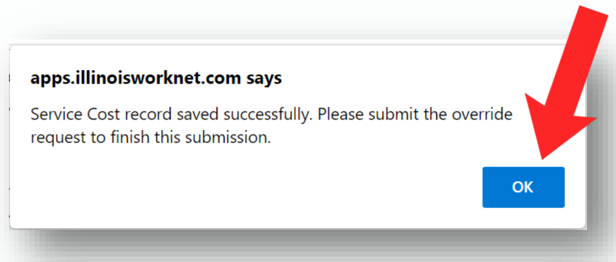


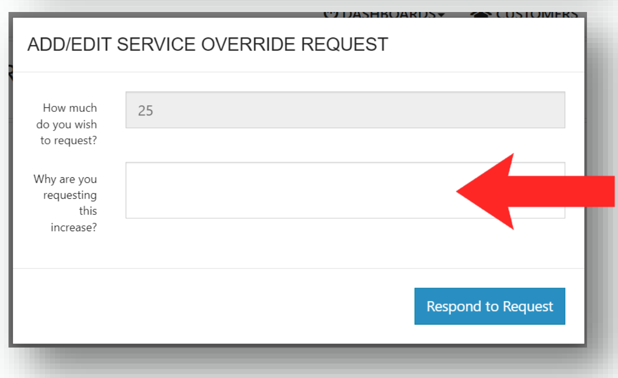
Requesting Cost Overrides

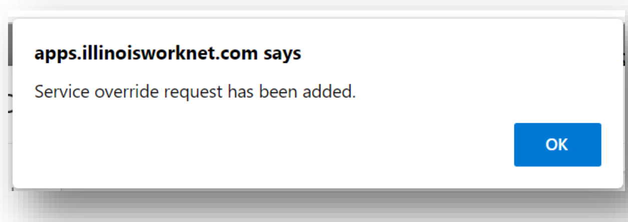
When entering supportive services that will exceed the maximum allowable payment for that category, ISETS will automatically prompt you to request a cost override. This means that an IDHS Program Manager must approve the overage, verifying that it is reasonable and necessary for the customer to reach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

When an override request is made, no additional requests or costs will be able to be added to that category of Support Service until the override request is approved or denied.

1. Edit a cost to a service as in the previous instructions.
2. In the "Dollar Value of Service" tab, click the "Add Service Cost" button.
3. Add the total cost even if it will exceed the maximum allowed for that category.
4. You will see a pop-up window prompting you to submit an override request. Click "OK".
5. The amount of the overage will automatically be entered in the first field.
6. Add an explanation of why you are requesting an overage in the next field.
7. Click the blue "Respond to Request" button.
8. You will see a popup confirming your override request has been added.
9. Click "OK".





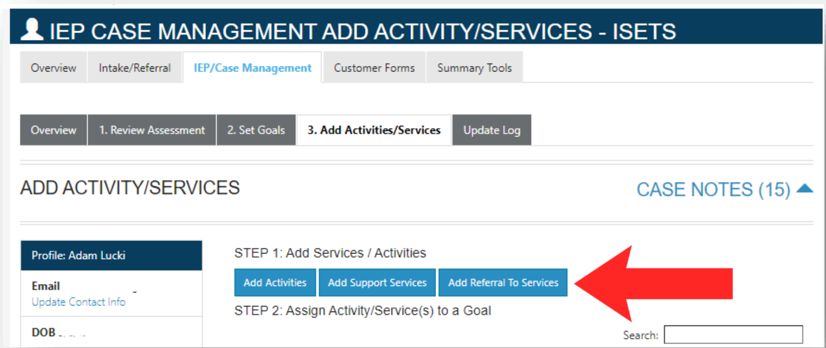


Adding and Managing Referrals to Outside Services

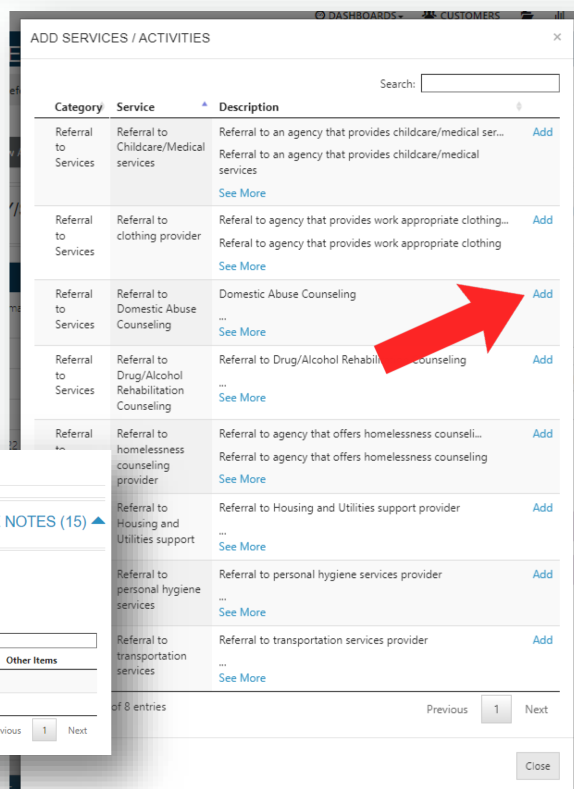
After you've enrolled a customer, you can document when you make referrals to other services (not SNAP E&T providers). Some of these may be referrals to substance abuse or other counseling, homelessness prevention services, or others that may be listed.

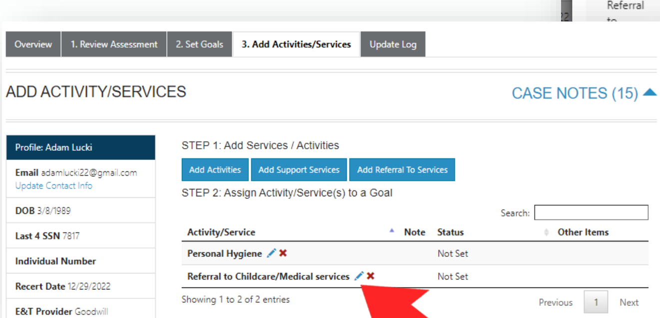
Costs can also be added underneath referrals to services but are not associated with your SNAP E&T contract. Documenting these referrals is only to keep an accurate and thorough record of the service to the customer.

1. From the customer record, click on the EP/Case Management tab.
2. Click on the Add Activities/Services tab.
3. Click on the "Add Referral to Services" button.



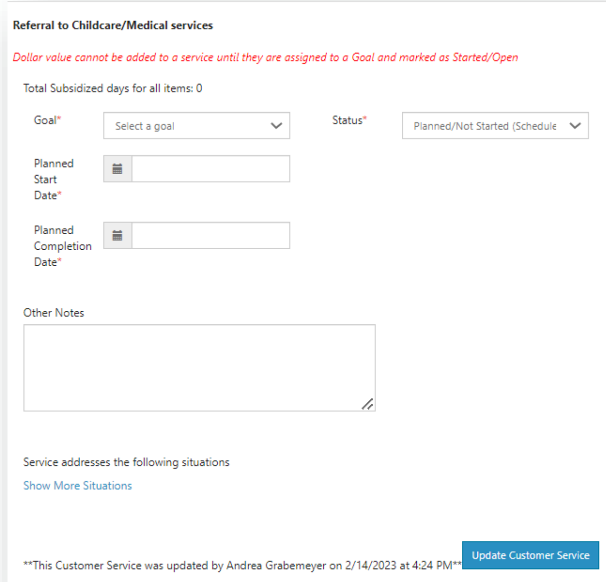
4. A popup window will open listing all of the Referral to Services options.
5. Click the blue "Add" link next to the referral you would like to add for this customer.
6. The referral will be added to the planned services section of their EP.
7. Click on the blue pencil icon next to the referral to edit the details.

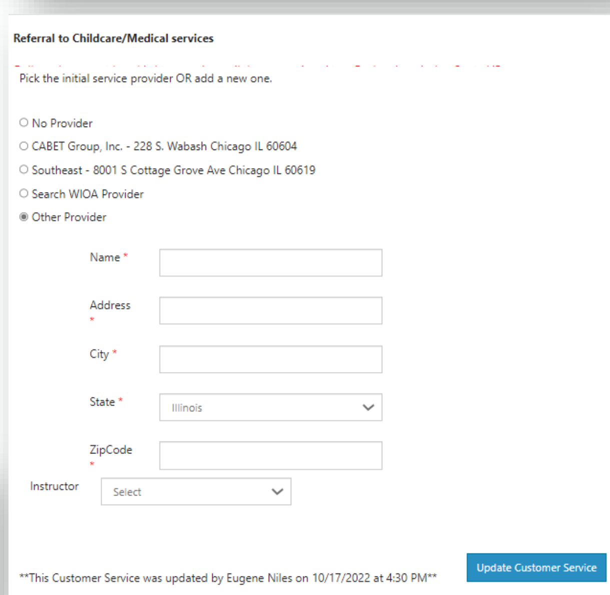


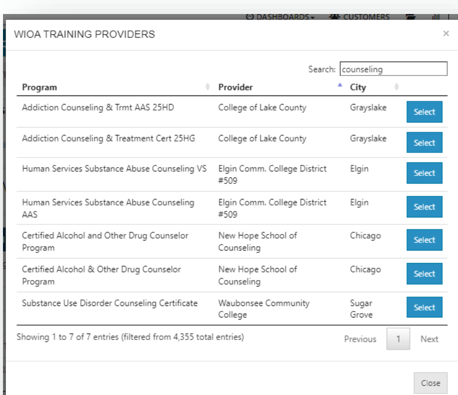


8. In the next screen, you can associate the referral with a relevant goal and change the status to Started/Open to begin.
9. Add the Planned Start date and Planned Completion Date and any Other notes.
10. Click the “Update Customer Service” button.
11. A popup will appear prompting you to enter a case note.
12. After officially opening the referral service, click on the “Service Provider” tab and enter the place you referred the customer to. They may be a WIOA provider, in which case they will be already in the system. If it is another provider (as in this example) you may need to enter the name and address of the service provider.
13. Click the “Update Customer Service” button to save the details.

Note: you may document costs here but you must make sure that the cost source is not listed as the SNAP E&T grant as these outside services are not paid for by SNAP E&T.





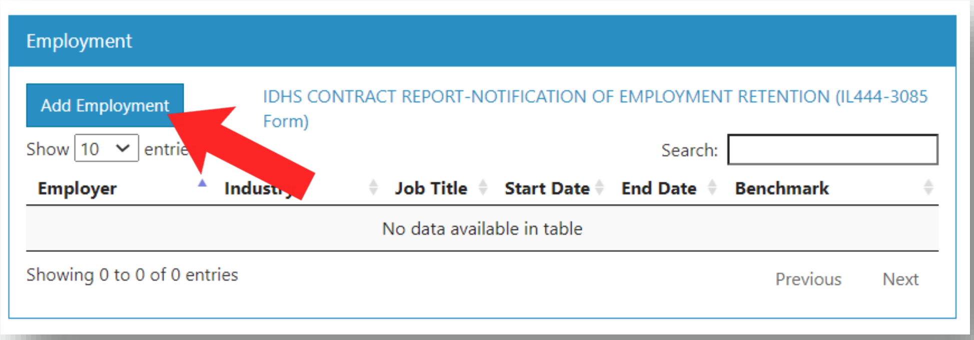


Adding and Managing Employment & Retention

When a customer gains employment, that information should be added to their record. In addition, 100% of employed customers working 20 hours per week or more must be offered Job Retention services. So, the customer will also be auto-enrolled in the Job Retention activity. That process is described here.

Note: customers who have been exited may be un-exited in the case that you enter employment (20+ hours/week) for that customer within 60 days of their exit date. They will then be automatically enrolled in Job Retention and services can continue.

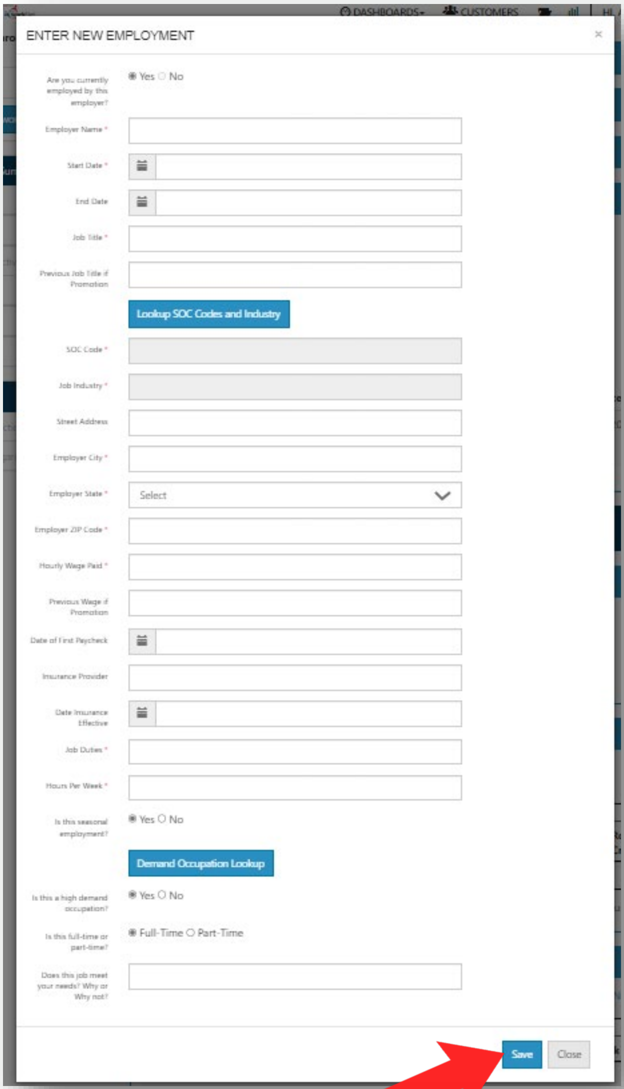
1. To add new employment, go to a customer's record. In the Overview tab scroll down to the the Employment Section and click the "Add Employment" button.
2. A new popup box will appear.

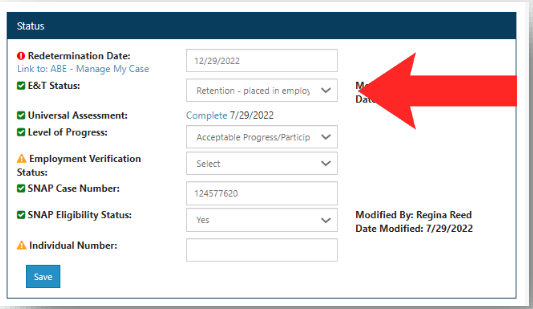


Click on the blue linked text at the top of this box to access the IL444-3085 form. This is the Employment verification form and will be needed to verify employment for outcomes reporting.

Note: Customers may gain employment that does not change their SNAP benefits or require them to exit the program after Job Retention (part-time, seasonal, or low wage employment may all qualify a customer to continue in SNAP E&T even after employment and retention).

3. Enter the Employer Name, Start date, Job Title, SOC Codes and Industry (click the button to look these up), the address of the employer (the location of the work site), Hourly Wage, Job Duties, Hours Per Week (in whole numbers with no symbols).
4. Indicate whether this is seasonal employment.
5. Lookup whether this is a high demand occupation by clicking the "Demand Occupation Lookup" button.
6. Choose Full-time or Part-time
7. Enter some notes about whether the job meets the customer's needs or not. If the job does not meet the customer's needs (it may be temporary or part-time), indicate so here.
8. Click the "Save" button.
9. If the hours are under 20/week, the Employment activity will be added to the customer's EP. In that case, services may continue as usual.
10. If the hours are 20+/week, the Job Retention Activity will automatically be added to the customer's EP and their SNAP E&T Status will be updated to "Retention".

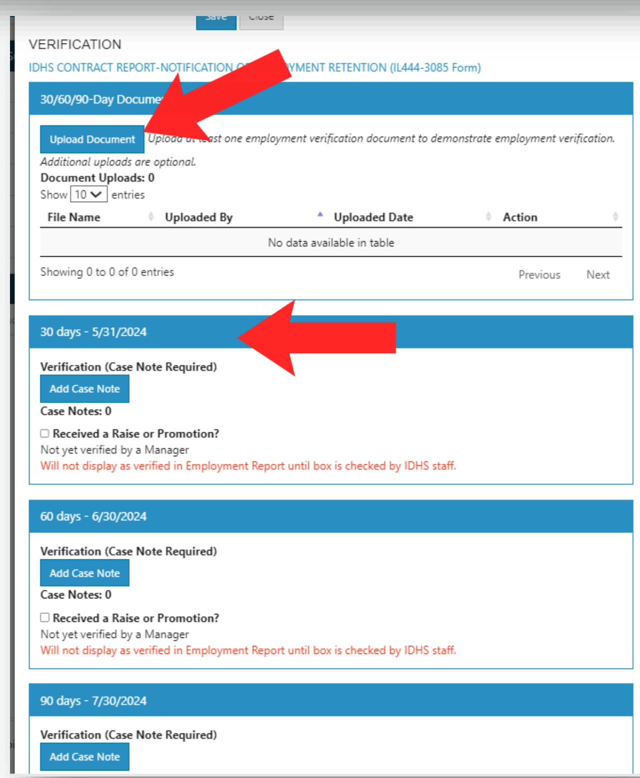




When adding employment of 20 hours or more per week, the Job Retention activity will automatically start on the employment start date and the planned end date will automatically calculate 365 days from the start date.

Within 30 days of employment, a verification document must be updated and verified by IDHS staff. At each 30-day increment during the first 90 days of Job Retention, a case note is required to verify that case management is happening. Simply go to the customer record, scroll down to the Employment Section and click on the blue linked job placement listed there. Employment verification only needs to be uploaded once in the first 90 days. After 90 days, Job Retention may continue for up to 365 days. When a Support Service is given, a customer must have employment verification within 30 days of that service to verify that they are still working and eligible for services.

1. The job placement will open in a popup window and you can scroll down to the Verification section.
2. Here you can add employment verification and case notes.



Best Practice

Pay attention to your customers in retention and follow up with them to offer supportive services. When they reach their 90 day benchmark it will be time to successfully exit them from the SNAP E&T program.

Customers in only the JR activity which expires at day 366 will be automatically exited from the program as successful completion. You should expect your Provider Manager to review all JR customers during Staffings.

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.

Providers will be given a written list of findings, if any, and given a reasonable timeframe to correct errors. If you have any questions about a finding or need help fixing data issues, you should contact your 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 your 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 are intended for use in remediating common "errors" and ensuring accurate reporting to FNS. If you receive notice from your Provider Manager that you have data to remediate, please do so immediately to avoid a finding being added to your Provider record.

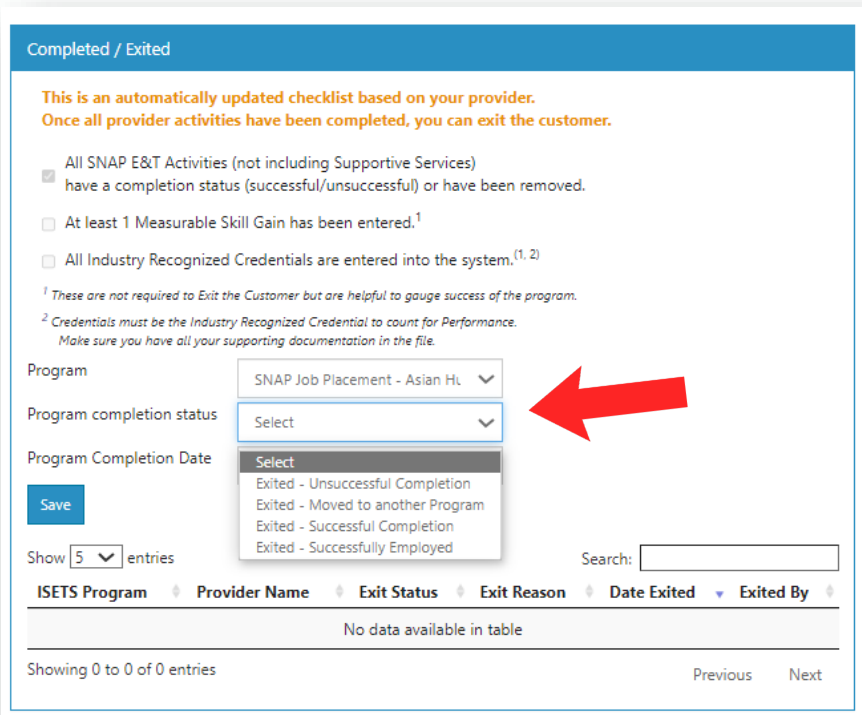
Exiting Customers from E&T in ISETS

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 that must be taken to ensure that they are Exited in ISETS.

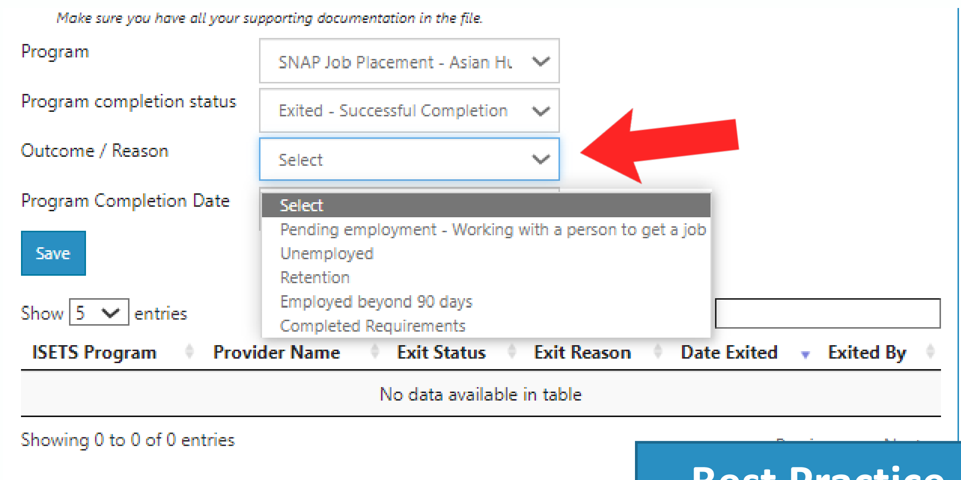
1. In the customer record, locate the customer's activities and edit those activities to reflect the appropriate completed status and the date they have completed those activities (or the exit date if they never technically completed them). Please see the "Adding and Managing Activities" section in this manual on how to edit these.
2. After all activities have been closed with an actual end date, you 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. Click on the Program dropdown and select your program.
4. Click on the dropdown menu and choose the appropriate Program Completion status.



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 oe 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. Enter the Program Completion date.
6. Click the "Save" button.



Best Practice

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

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

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.

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

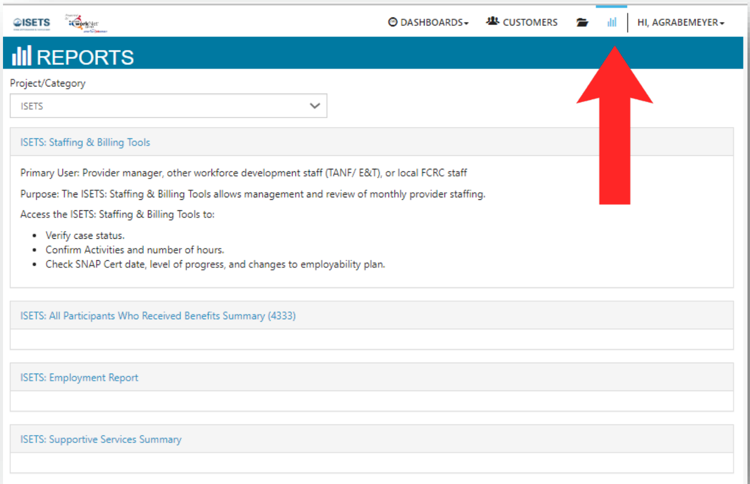
Provider staff are responsible for entering data on a day-to-day basis which populates monthly, quarterly, or year-end reports. Providers are responsible for ensuring the accuracy of this data.

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 customers 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.

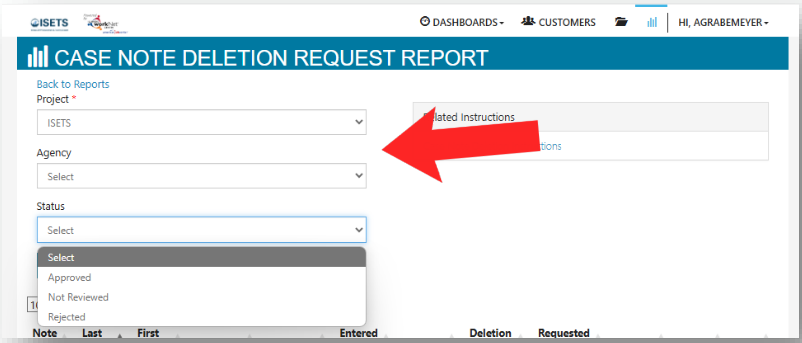
All available reports are listed individually depending on your role and access. Some reports described here may not be available to you individually, but you should know that they exist.



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.

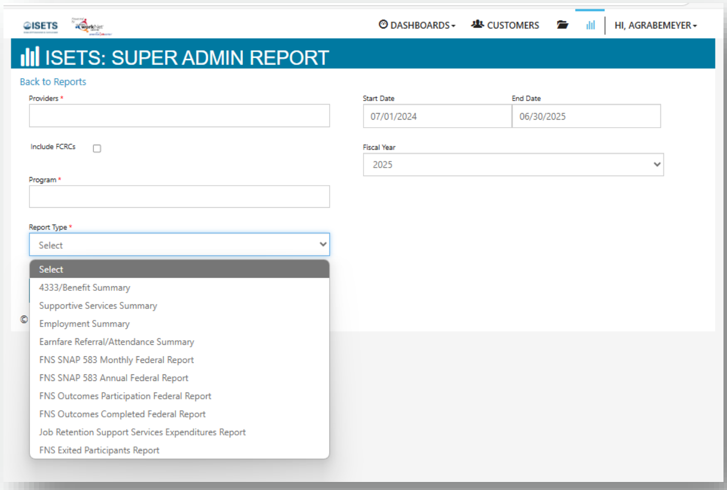


To review requests, navigate to this report and

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.



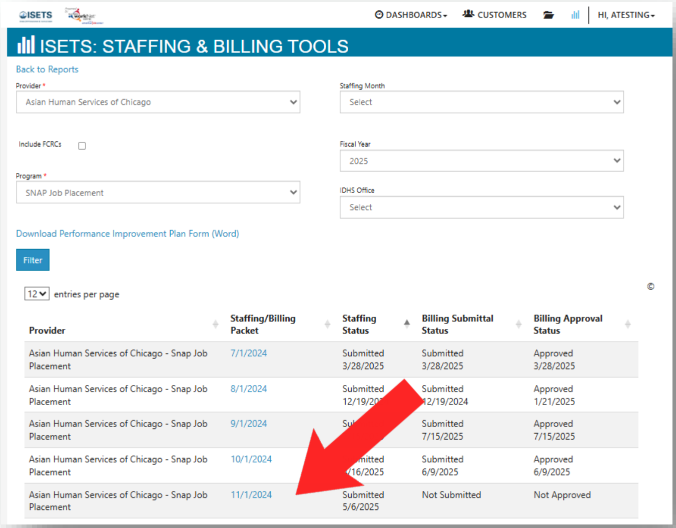
Data Integrity Report
This report was discussed in the [Ensuring Partner Data is Accurate]section. Please refer to that section for more about this report.

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.



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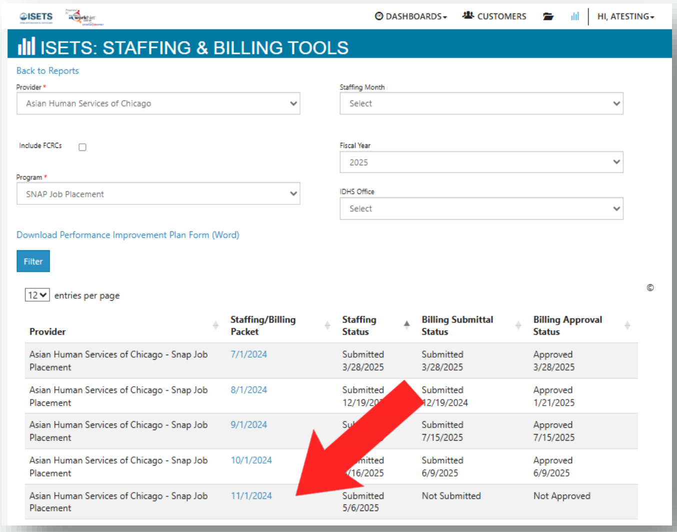
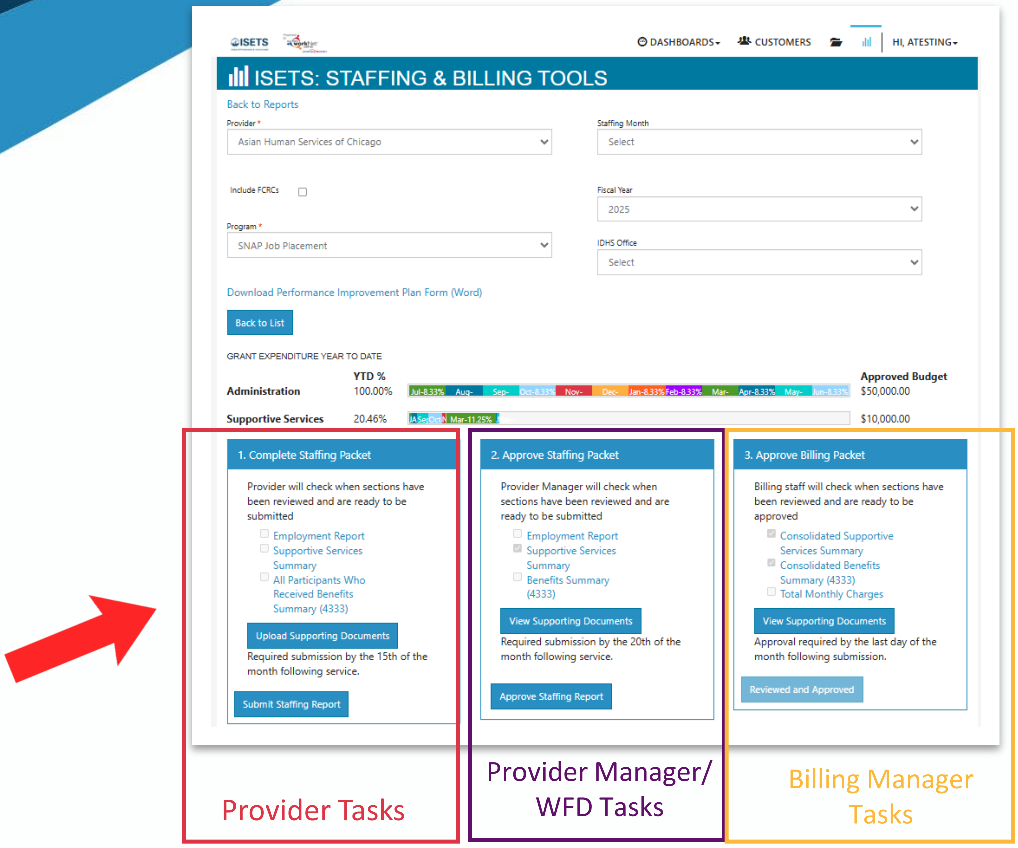
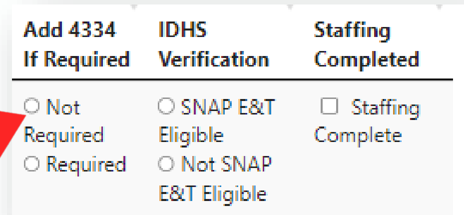
Staffing & Billing Costs Color Differences
Red font – override approved
Gold Triangle – pending override
Red Triangle – change to staffing





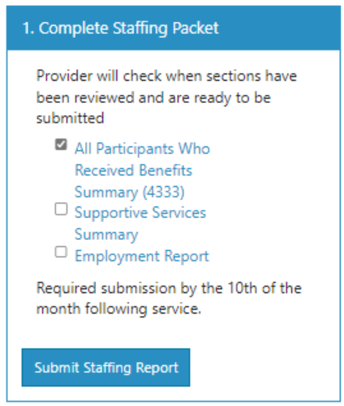
7. The first section titled “Complete Staffing Packet” is where Providers should begin.
8. Click on the first blue linked report: “Employment Report”. Verify that this report is correct including all employment verifications (they should all say “yes”).
9. If everything is correct and no changes are needed, click the “Approved by Provider” green button.
10. Back on the main S&B page the box next to the report verifying that it is correct and complete should be checked for you.
11. Then click on the next blue linked report: “Supportive Services Summary”. Verify that all data in this report is correct and complete ticking the “Approved by Partner” boxes to ensure each cost is included in the billing for reimbursement.
12. Last, click the blue linked report “All Participants Who Received Benefits Summary (4333)”. The 4333 report page will load.
13. Ensure all filters are correct and click the “Filter” button. This report lists all customers enrolled in your program who have an open activity during the month of the report.
14. Review this list and ensure that all active customers are included. If a customer is missing, go to that customer’s record and ensure that the following are true:
    - 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
14. Ensure all customer activities are correct, Progress Level is correct, and no customers need data corrections.

If you are concerned about a customer who DOES meet all of these criteria and is still not showing up on the 4333 report, submit a Help Request and our staff will review all of the specific information you have provided (customer identification and screenshots) in your ticket and will look into the reason for this error. You will receive a response within 48 business hours.



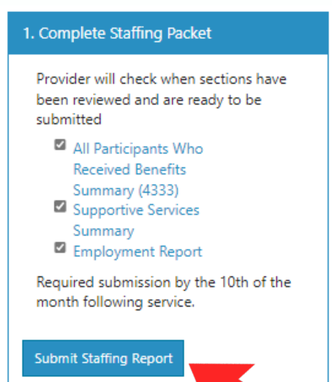
11. For each customer, click the radio button indicating if a Full Staffing/4334 is required. Clicking the “Required” radio button means that you need to have a discussion with a Provider Manager (potentially including the customer) to discuss their progress and participation in the program.
12. The other two columns (“IDHS Verification” and “Staffing Completed”) are not editable by Providers. These fields are for IDHS staff to complete.
13. Click the “Approved by Provider” green button.
14. Return to the “Staffing & Billing Tools” page. The box indicating that the 4333 report is complete and correct should be checked.
15. Return to the “Staffing & Billing Tools” page and select the blue linked text for the Monthly Financial Report. Add a report for the month that matched your EDF.
16. When finished Return to the “Staffing & Billing Tools”. All boxes should be checked. Click the “Submit Staffing Report” button.
17. IDHS staff will review the reports and schedule a Staffing meeting with your organization to review the reports and your progress toward performance goals.

SNAP



Earnfare

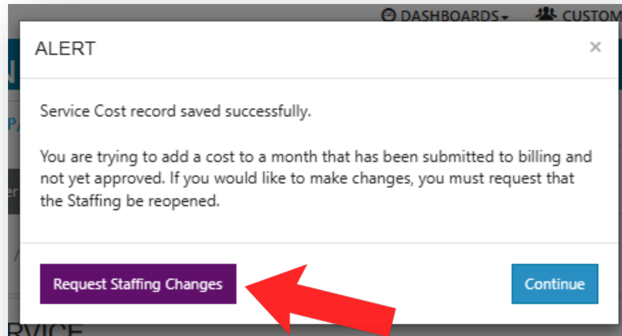
SNAP



Earnfare

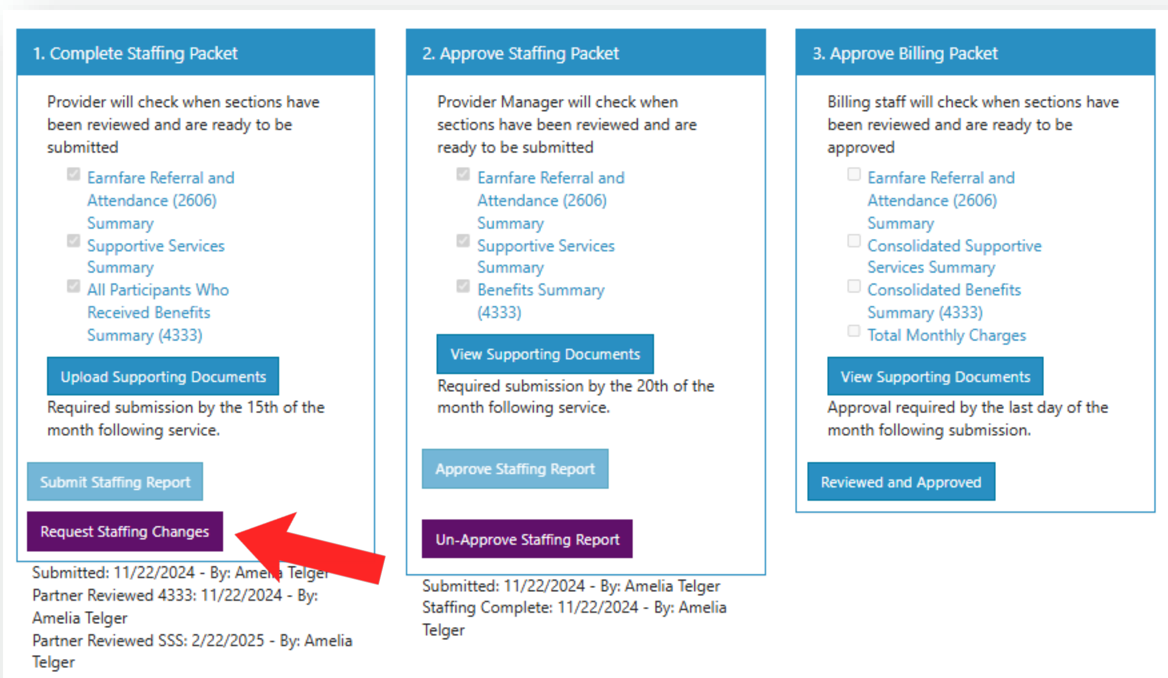
Note: Customers enrolled in some activities for 6, 9, or 12 months consecutively may have a 4333 required. In these cases, the “Not Required” radio button will be greyed out and they MUST be discussed during the staffing.

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 you 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, you will see a pop up like the one above. You 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.



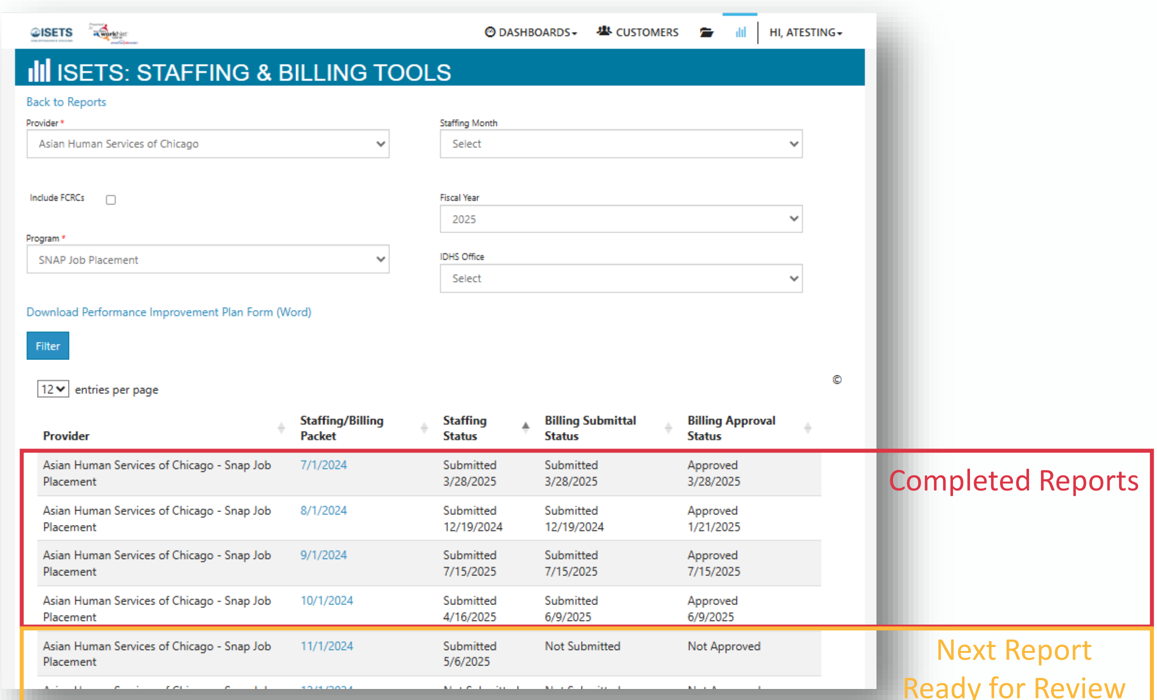
The Provider Manger may need to hold another meeting with the Provider to review and approve changes before approving the staffing again. Then Billing can review and approve their part.

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.

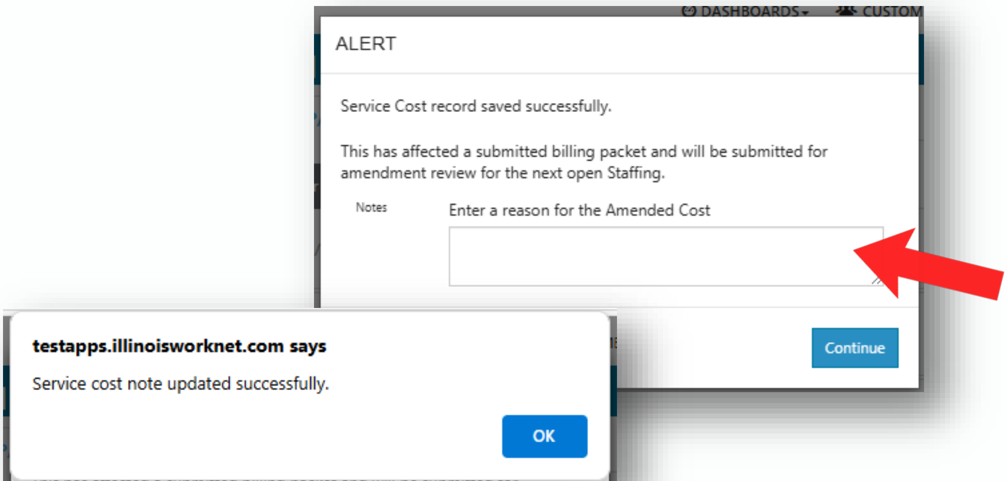
Staffing & Billing Amendments

Amendments are changes that impact past reports that have already been submitted, approved, and locked. These changes may include costs or not. Changes that do not include costs are made and automatically accepted on a provisional bases until IDHS staff review them in the next available staffing. Provider Managers review these changes and approve them to be saved in the system and reflected in final reporting. Changes that include costs must be reviewed and approved by a Billing Manager.

If a monthly Staffing & Billing report is already approved and locked as in the example of July, August, September, or October in the screenshot here, any changes the Provider makes will be saved in ISETS and will be available to review in the next available staffing, in this case November.

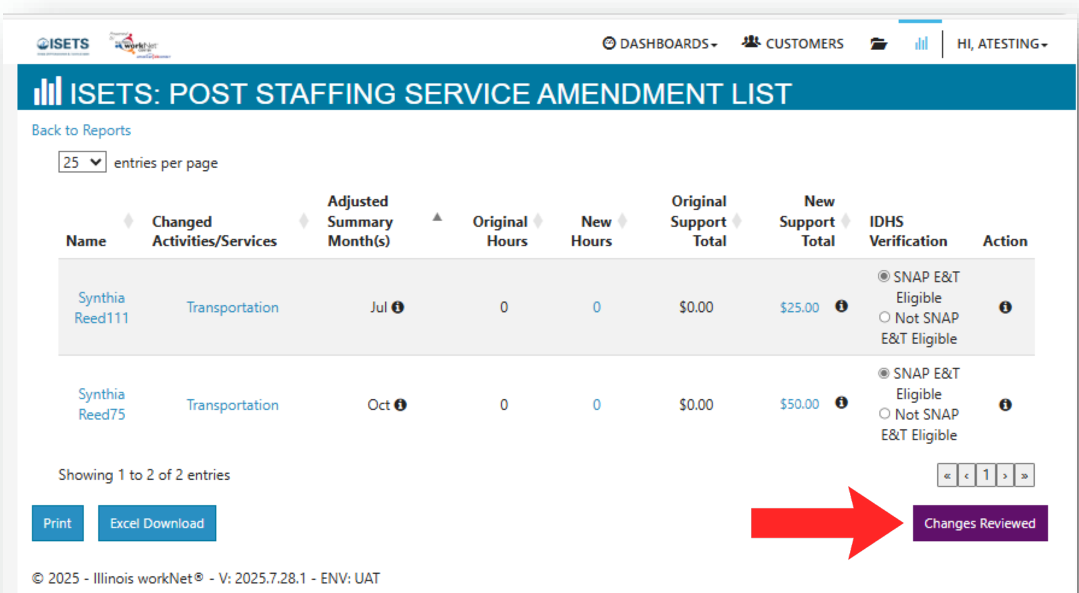


If a Provider adds a Supportive Service cost that applies to a past month for which the reporting is already closed, you will see a pop-up alert like this:



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

Your Provider Manager will review all amended changes during the next Staffing. Using the "Post Staffing Service Amendment List" report shown below.



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

Providers should also review and discuss your overall progress toward contract goals during staffings. 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.

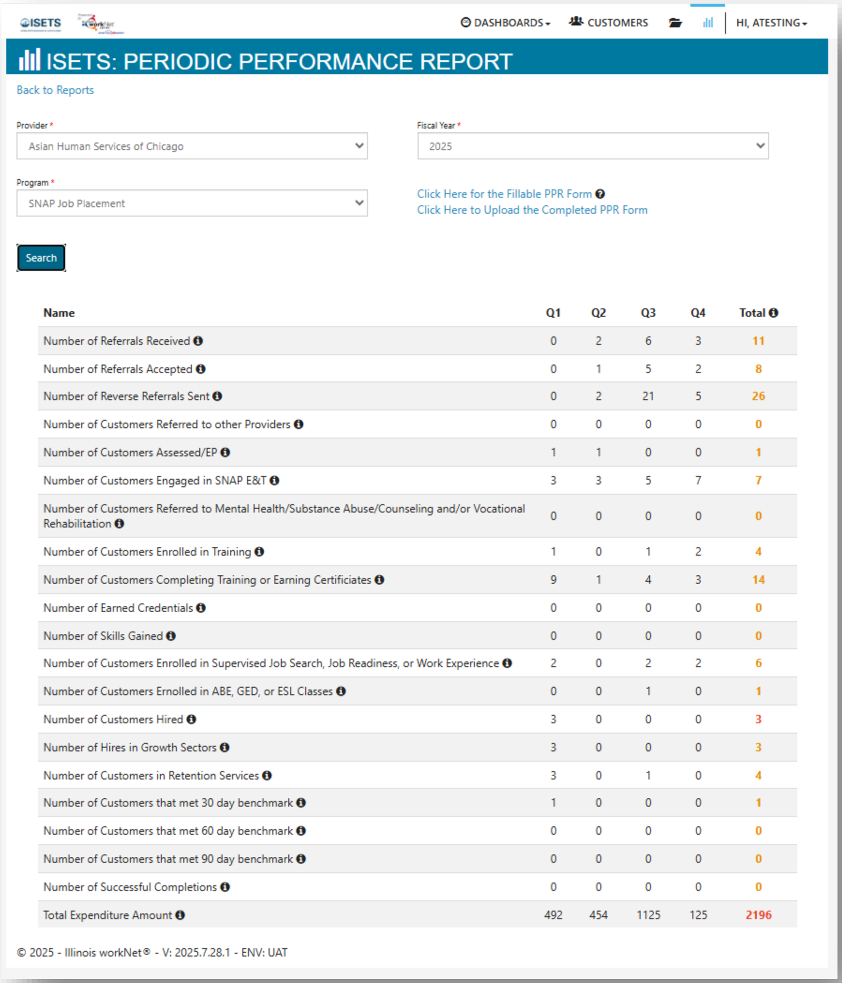
FNS Report
This set of reports is used by IDHS Administrative staff to generate data to report State SNAP E&T performance to FNS.

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)



ISETS | DASHBOARDS | CUSTOMERS | HI, ATESTING

ISETS: 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 Certificiates	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 Ernolled 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.

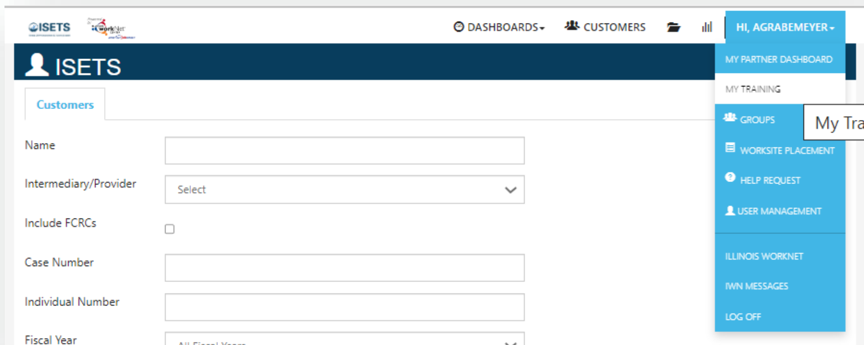
Credentials Report
This report provides a list of all credentials earned in total by industry, Provider, type and timeframe.

Where to Get Help

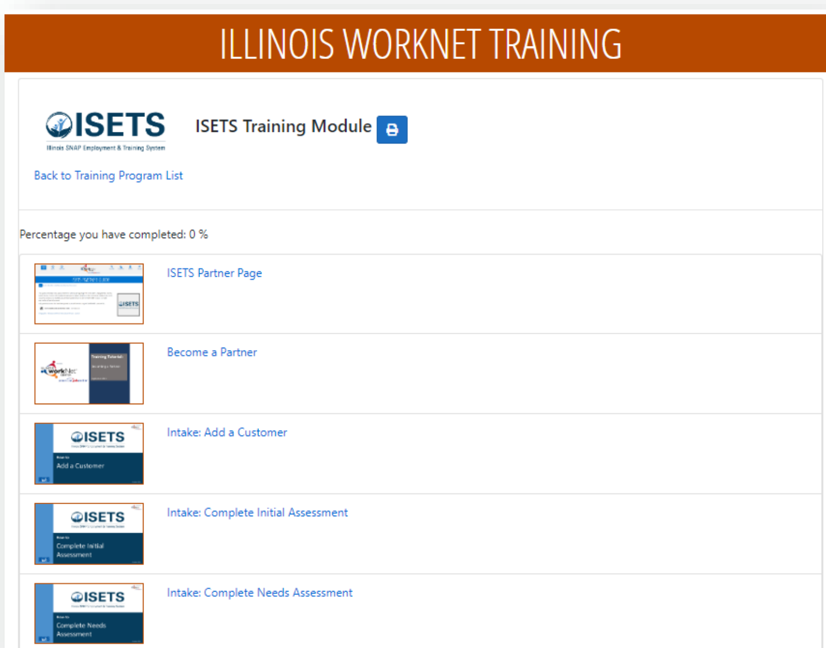
In ISETS there are several places to get help learning the new system or to get help with system issues. We also have [live virtual trainings]hosted by the Chicago Jobs Council and live virtual Technical Assistance calls twice a month. Resources, training recordings, and TA Calls can be found by accessing 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.

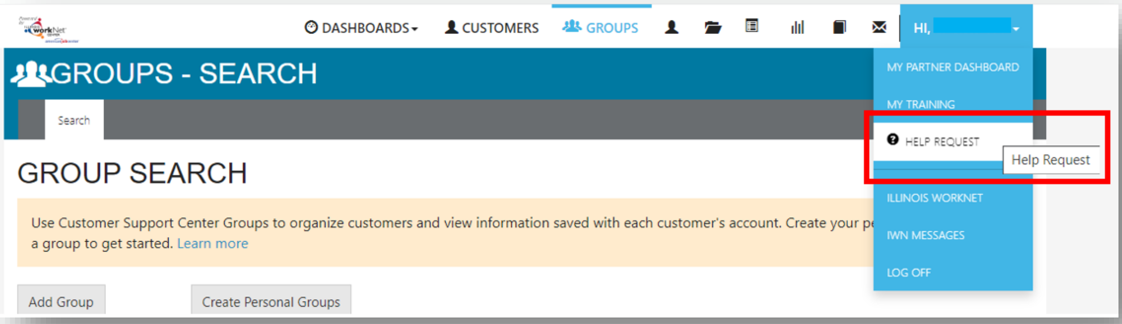


2. A new browser window will load called "Illinois WorkNet Training".
3. Click on the blue "Start the ISETS Training Module" link. Each module is listed there with a video walkthrough by subject matter.

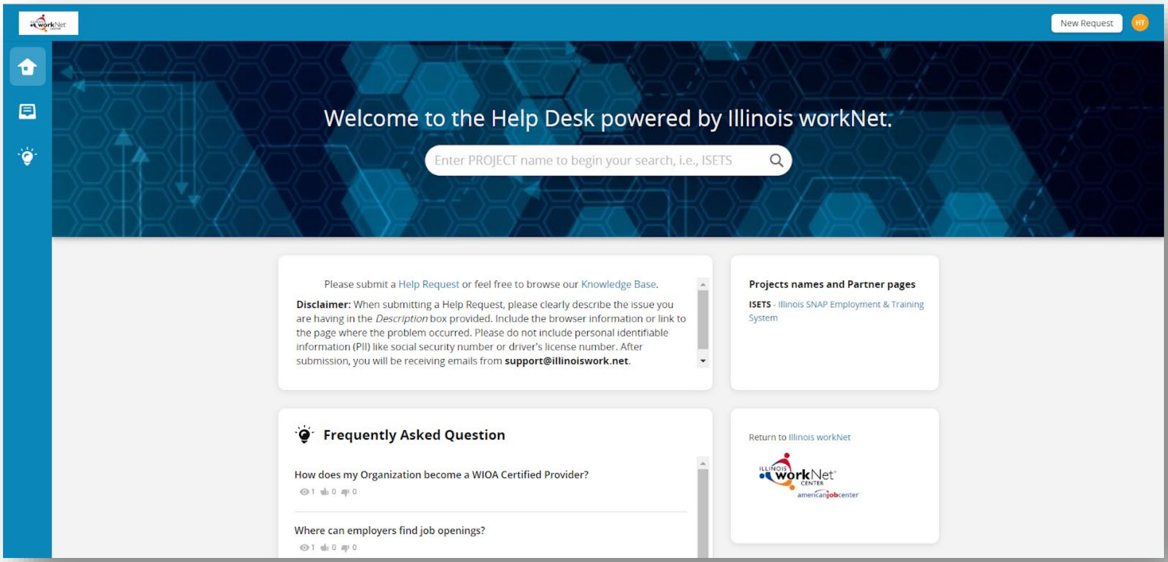


Submitting a new Help Request

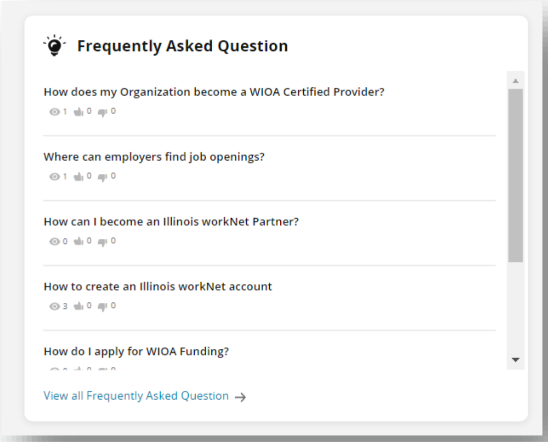
1. Click “Help Request” in the dropdown menu when in the Username Menu in ISETS.

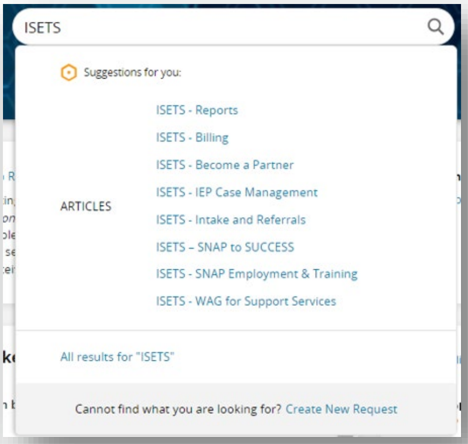


2. A new browser window will load called “Help Desk powered by Illinois workNet”.
   Options include:
   •Submit a new Help Request.
   •Browse Knowledge Base for answers to questions.
   •Browse Frequently Asked Questions.
   •Visit program partner pages.
   •Return to Illinois workNet.
   •View a video tutorial and/or written instructions.

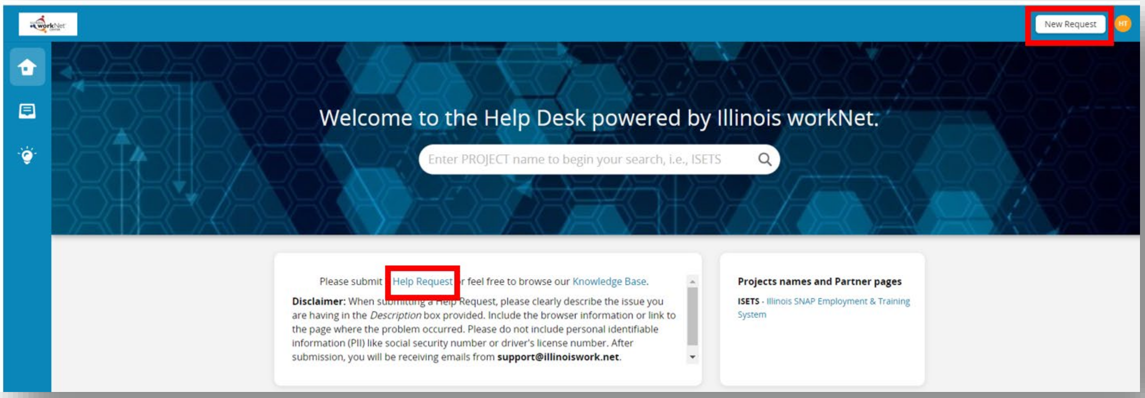


3. Before submitting a Help Request, utilize the Knowledge Base by browsing the **Frequently Asked Questions** and specific program articles. Articles can be searched by typing the program name in the search box.





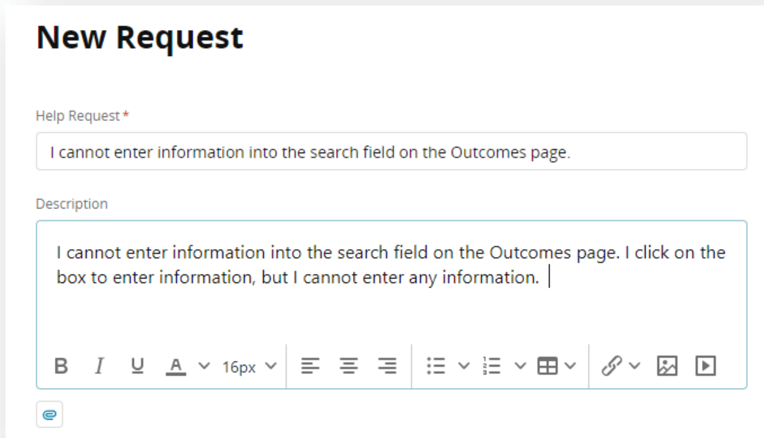
4. On the Home screen, submit a new Help Request by clicking Help Request in the middle of the page or by clicking New Request on the top right.



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:

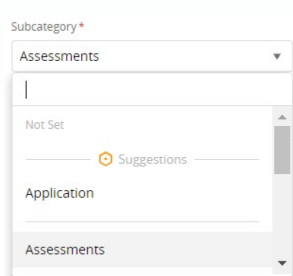
- Attach documents using the paperclip feature under the box.
- Insert pictures.
- Insert videos.
- Insert links.

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.

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.



7. 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

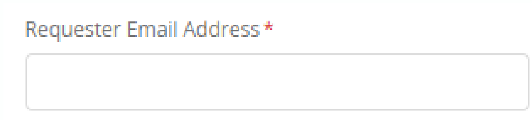
Best Practice

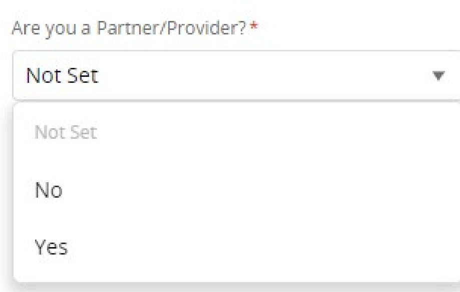
ALWAYS include the provider manager assigned to the agency in the CC field in a Help Request.

7. 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.

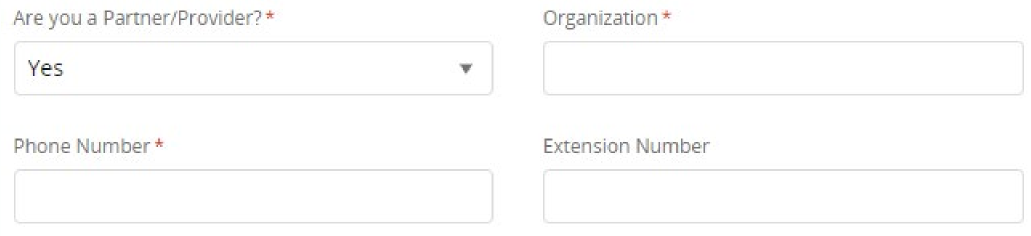

Requester First Name *
Requester Last Name *

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

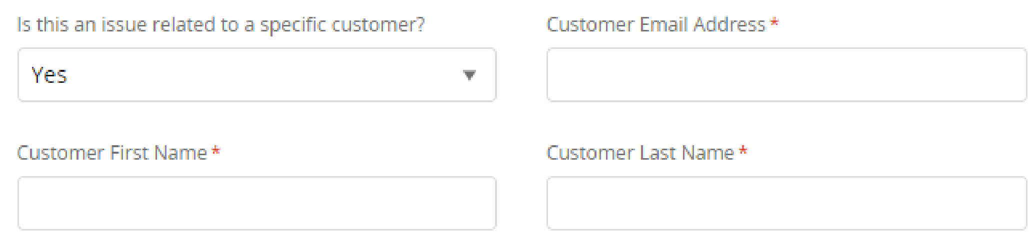

Requester Email Address *


Are you a Partner/Provider? *
Not Set
Not Set
No
Yes

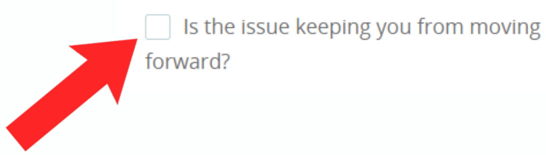
8. “Are you a Partner/Provider” is a required field. Select Yes or No.
9. The “Organization” field is not required for individual users but is required for Partner/Providers.
10. The “Phone Number” field is required for Partner/Providers. Add an Extension Number if applicable.


Are you a Partner/Provider? *
Yes
Organization *
Phone Number *
Extension Number

11. 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 *

12. If this issue is preventing you from moving forward, please click the check box to indicate that so we can prioritize your request.



13. After reviewing the information entered, click Create at the bottom of the page to submit the new Help Request.

A notification email is sent (within minutes) following submission of the Help Request. Check 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 via your Provider Manager to assist you. 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
- Live virtual trainings hosted by CJC
- This manual

To request additional training, contact your Provider Manager. When making a request, please clarify what information/processes you need instruction on and when you are available. We find it 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 people, your Provider Manager will 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 5th, 13th, 20th and 27th.						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

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**
  - 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.