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## Purpose and Users

### Purpose

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

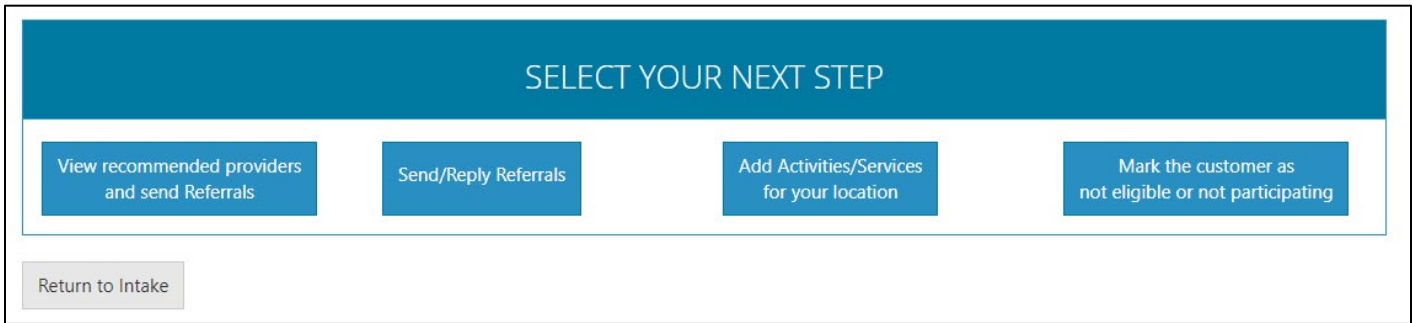
### Users

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

## Definitions

### Adding Activities / Services – Provider Staff

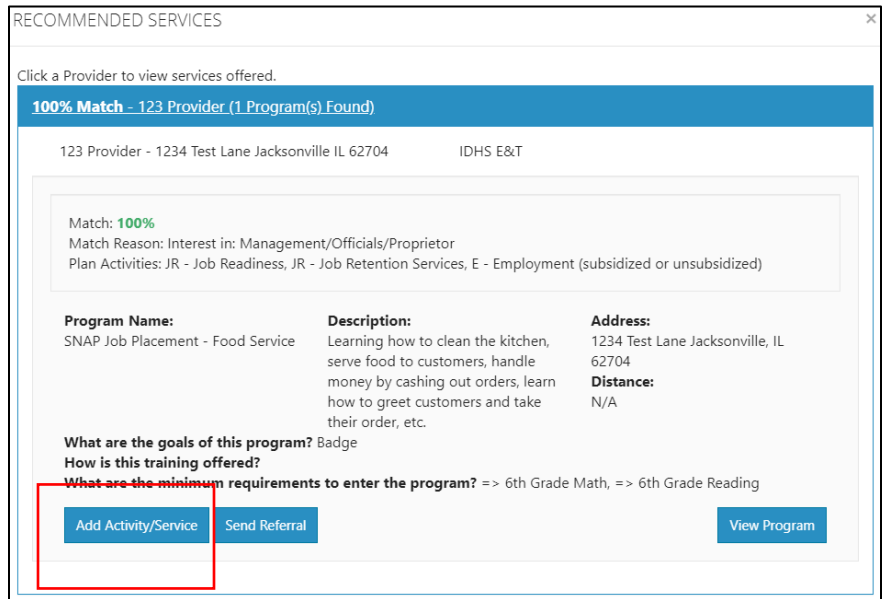
1. Add customer and complete assessments.
2. Send appropriate referrals
3. Add activities



The screenshot shows a user interface titled "SELECT YOUR NEXT STEP" with a teal header. Below the header are four blue buttons: "View recommended providers and send Referrals", "Send/Reply Referrals", "Add Activities/Services for your location", and "Mark the customer as not eligible or not participating". At the bottom left, there is a grey button labeled "Return to Intake".

### View Recommended Providers and Send Referrals

#### Add activities



The screenshot shows a window titled "RECOMMENDED SERVICES" with a close button (X) in the top right corner. The window contains the following information:

- Click a Provider to view services offered.
- 100% Match - 123 Provider (1 Program(s) Found)**
- 123 Provider - 1234 Test Lane Jacksonville IL 62704 IDHS E&T
- Match: **100%**
- Match Reason: Interest in: Management/Officials/Proprietor
- Plan Activities: JR - Job Readiness, JR - Job Retention Services, E - Employment (subsidized or unsubsidized)
- Program Name:** SNAP Job Placement - Food Service
- Description:** Learning how to clean the kitchen, serve food to customers, handle money by cashing out orders, learn how to greet customers and take their order, etc.
- Address:** 1234 Test Lane Jacksonville, IL 62704
- Distance:** N/A
- What are the goals of this program?** Badge
- How is this training offered?**
- What are the minimum requirements to enter the program?** => 6th Grade Math, => 6th Grade Reading
- Buttons: "Add Activity/Service", "Send Referral", and "View Program".



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### Add Activities/Service

If your organization will be providing services click the button **Add Activity/Service**. This includes support services and program services. We will cover adding services in a later section.

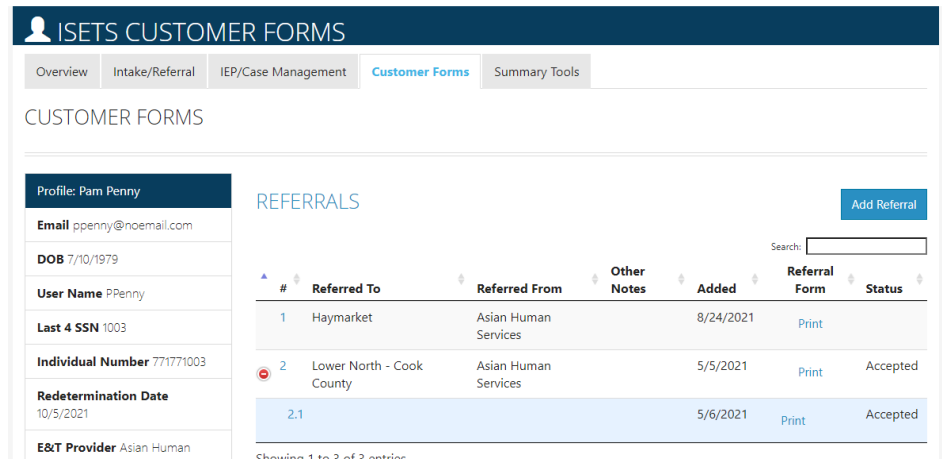
## Next Step - Send/Reply Referrals

Send a referral for a customer at any time.

1. Select **Intake / Referral** tab
2. Select **Send/Reply Referrals**
3. Click **Add Referral**
4. Follow the steps listed above for a Referral to another agency or for a Reverse Referral to an FCRC.

## Approve / Reject Referrals

1. As an FCRC – view the referrals to your location. From the ISETS Dashboard, access the list of referrals submitted to your organization that require action.



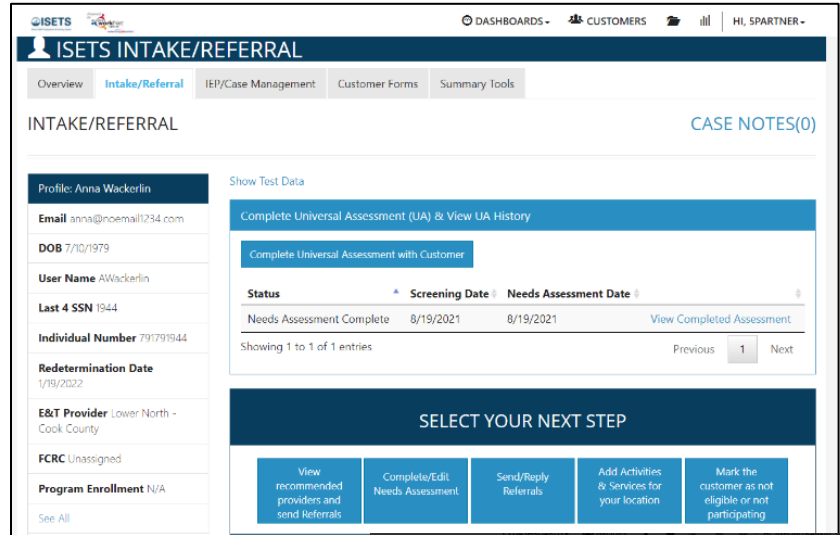
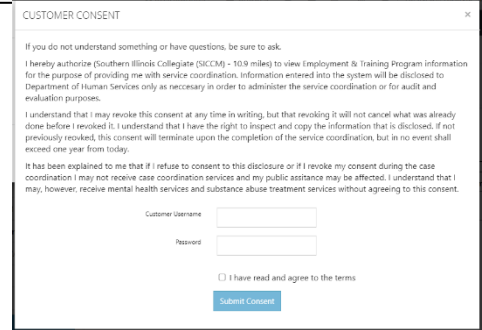
The screenshot shows the 'ISETS CUSTOMER FORMS' interface. The user is logged in as Pam Penny. The 'Customer Forms' tab is selected. The main area displays a 'REFERRALS' table with the following data:

#	Referred To	Referred From	Other Notes	Added	Referral Form	Status
1	Haymarket	Asian Human Services		8/24/2021	<a href="#">Print</a>	
2	Lower North - Cook County	Asian Human Services		5/5/2021	<a href="#">Print</a>	Accepted
2.1				5/6/2021	<a href="#">Print</a>	Accepted

Showing 1 to 3 of 3 entries

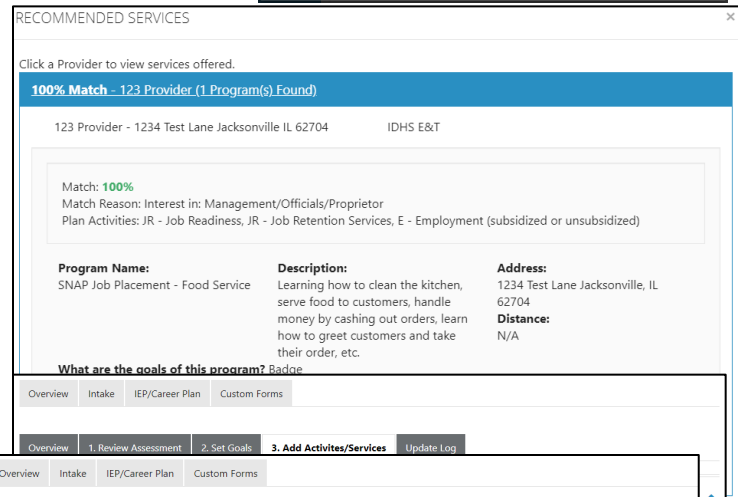
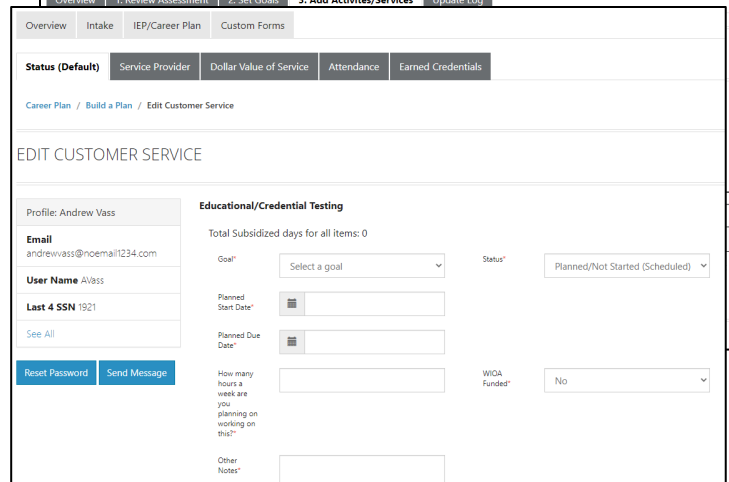
### Send Referral

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

### Add Activity/Service

1. Click **Add Activity/Service** to add a service or activity to the customer's IEP/Case Management. You will be redirected to the IEP.
- 2.

**Educational/Credential Testing**

Total Subsidized days for all items: 0

Goal\*  Sta

Planned Start Date\*

Planned Due Date\*

How many hours a week are

### Assessments

Add any assessment results to the customer's assessments summary. A number of assessments are available in Illinois workNet. Ones that are not maintained by IwN can be added, i.e., Casey Life Skills, TABE and others.

**SELECT YOUR NEXT STEP**

View recommended providers and send Referrals

Complete/Edit Needs Assessment

Send/Reply Referrals

Add Activities & Services for your location

Mark the customer as not eligible or not participating

**NEXT STEPS IF ENROLLING THE CUSTOMER IN YOUR PROGRAM**

Inform customer of program requirements and complete additional assessments as needed

**NEXT STEPS IF ENROLLING THE CUSTOMER IN YOUR PROGRAM**

Inform customer of program requirements and complete additional assessments as needed

- Inform customer of program requirements and complete additional assessments as needed.
- [Enter assessment results into the system.](#)

**Assessments Not Available Through Illinois workNet** [Add Assessment Results](#)

Assessment Name/Description	Edit/View Results	Assessment Date	Type	Category	Updated
No data available in table					

Showing 0 to 0 of 0 entries Previous Next

Provide Customer with information on how to access their IEP/Career Plan.

**ENTER ASSESSMENT**

Assessment Type\*

Assessment Category

Functional Area\*

Assessment Name\*

Assessment Description\*

Assessment Date\*

Grade Level Equivalent\*

Educational Functional Level

Scale Score\*

Results\*

Did completing this assessment result in a credential?\*

What did you use this assessment for?

Career Coaching  Identify Talent  Referrals  
 Career Guidance  Improve Performance  Other  
 Eligibility  Job Alignment



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RECOMMENDED SERVICES

Click a Provider to view services offered.

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

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

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

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

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

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

RECOMMENDED SERVICES

Click a Provider to view services offered.

100% Match - 123 Provider (1 Program(s) Found)

123 Provider - 1234 Test Lane Jacksonville IL 62704 IDHS E&T

Match: 100%  
Match Reason: Interest in: Management/Officials/Proprietor  
Plan Activities: JR - Job Readiness, JR - Job Retention Services, E - Employment (subsidized or unsubsidized)

<b>Program Name:</b>	<b>Description:</b>	<b>Address:</b>
SNAP Job Placement - Food Service	Learning how to clean the kitchen, serve food to customers, handle money by cashing out orders, learn how to greet customers and take their order, etc.	1234 Test Lane Jacksonville, IL 62704
		<b>Distance:</b> N/A

**What are the goals of this program?** Badge

**How is this training offered?**

**What are the minimum requirements to enter the program?** => 6th Grade Math, => 6th Grade Reading

Add Activity/Service

Send Referral

View Program

## IEP/Career Plan

To complete the Intake process, go to **Step 4. Provide Customer with information on how to access their IEP/Career Plan**. Review the information with the customer, check the box at the bottom of the screen indicating you have completed the review. Click the blue box **Go to the Customer's IEP/Case Management Section** to begin the plan.

### NEXT STEPS IF ENROLLING THE CUSTOMER IN YOUR PROGRAM

Inform customer of program requirements and complete additional assessments as needed

Provide Customer with information on how to access their IEP/Career Plan.

#### Use Customer's IEP/Career Plan to:

**1. Discuss Universal Assessment responses.**

- Discuss goals based on the customer's current situation and where they want to be. Add the goals to the IEP/career plan.
- Discuss steps/services that can help them reach their goals. Add the steps/services and related information into the plan.
- Make sure the customer agrees to the plan. If not, make adjustments so they are on board with the plan.

**2. Have the customer sign the plan either electronically (paper copy is not needed) or physically (paper copy is needed).**

- Make sure the customer knows how to view their plan online through their Illinois workNet account.
- They should know the plan is a communication tool they should review and let you know if they need to make any adjustments to the plan.
- Let them know they may be asked to electronically sign the career plan if changes are made.
- Let them know they can see a history of updates to their plan.
- Let them know there are other resources in the plan that can help them update their resume and find a job.

**3. Update the plan as needed.**

- Add case notes.
- Update steps/services as they are started, completed, updated.
- Have the customer electronically sign their career plan as needed.

I have provided the customer with features and how to access their career plan.

[Go to the Customer's IEP/Case Management Section](#)





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## Status updates

After a client begins activities with the provider, the provider needs to submit a 2151 status update.

Monthly a status update is required. Follow these directions.