Purpose:

The referral tool allows grantees to refer their designated organizations' customers to partners for barrier reduction/support services through the reporting system so they can track referrals needed and the status of those referrals.

Who Enters/Maintains Data

- Grantees submit customer referrals through the reporting system.
- Partners submit their responses online. These partners are not required to be in the system to respond.

Access Customer Details

1. Log into www.illinoisworknet.com.
2. Select My Dashboard.
3. Select Customer Support Center under Partner Tools.
4. Select Groups in the top menu.
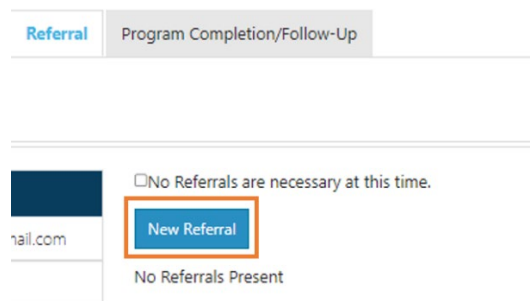5. Select the group CEJA/FEJA Programs.

Start Referral Process

1. Use the following search fields to narrow results to a specific subset of customers.
2. Select the Last Name of the customer to access customer-level details.
3. Click on the Referral tab located at the top of the menu.

Add Referral

1. Click the button New Referral

2. In the window that opens enter the information for the following steps:

a. Step 1 – Select Organization
   i. Click Search Organization to see if the organization has already been added. If it has, click the Select button. If it has not, click the New Organization button and enter the information in the required fields.

b. Step 2 – Select Organization Contact
   i. Click Search Contact to see if the contact has already been added. If it has, click the Select button. If it has not, click the New Contact button and enter the information in the required fields.

c. Step 3 – Identify Service(s) Needed
   i. Check the appropriate boxes for the service(s) requested.
   ii. You may also enter a note.
   iii. Click the button to Submit a Referral.

3. An email with a link to respond to the referral request will be sent to the contact.

4. The Referral page will refresh and you will see the referral that was created in the table below the New Referral button.

5. The Referral will be sent via email to the contact. It will include the customer's name, the referring organization, and a prompt to please respond within 5 business days. The contact will be provided a link with further information about the referral and the ability to respond add a note. Once they have responded, the referral status will then be updated on the Referral page for that customer.

View/Edit Referrals

- To view referrals, you can select the hyperlinked "View" text and see the information that was submitted in the referral for that customer.

- You may also cancel the referral by selecting the Cancel Sent Referral button. Below the button is a text box where you can provide a reason for the canceled referral.

- Once the request has been cancelled, the referral status in the table will be updated to "Canceled". Additionally, you may Resend the Referral by selecting the Resend Referral button. The referral will then be emailed to the contact provided.

Referral Status Populate the Progress Page

If referrals are identified on the Service Needs Assessment, those will be listed on the customer's progress page under <u>Service Needs Assessment Items</u>. The most recent assessment will determine what is needed barrier reduction services/referrals are populated on the progress page. As those referrals are sent/responded to, the system will indicate they are "good" or have been addressed.

If a referral is sent and is not aligned to a referral identified on the Service Needs Assessment, it is listed under <u>Other Referrals</u>. As those referrals are sent/responded to, the system will indicate they are "good" or have been addressed.

Referral System Alignment to the Service Needs Assessment (SNA) Referrals

SNA Section	SNA Referral Options	Aligned to Referral System Category
ACCOMMODATIONS & STUDENT SERVICES	Referral to a disability services organization or office for an assessment	Disability Accommodation
TECHNOLOGY ASSISTANCE	Referral for technology assistance	Other: Internet Other: Services – Broadband Fees Other: Services – Technology Rental Other: Technology Rental Other: Technology Assistance Training
TECHNOLOGY ASSISTANCE	Referral for other: Phone	Other: Phone Other: Cell Phone Acquisition
TRANSPORTATION	Referral for Transportation Assistance	Other: Transportation
CHILDCARE/FAMILY MEMBER	Referral for Childcare Referral for Dependent Care	Dependent Care: Childcare Dependent Care: Dependent Care Assistance
HOUSING	Referral for housing assistance	Housing Assistance
FOOD	Referral to local food pantry or SNAP benefits	Other: Services – Food Assistance

HEALTHCARE	Referral for Child Safety Services/Counseling Referral for Domestic Violence Services/Counseling Referral for Health Care Services/Counseling Referral for Mental Health Services/Counseling Referral for Substance Abuse Services/Counseling	Referral for Child Safety Services/Counseling Referral for Domestic Violence Services/Counseling Referral for Health Care Services/Counseling Referral for Mental Health Services/Counseling Referral for Substance Abuse Services/Counseling
LEGAL	Referral for Legal Aid	Legal Assistance
FINANCIAL LITERACY	Referral for financial literacy assistance	Add Financial Literacy Assistance to the referral tool
MENTORSHIP	Referral for mentorship through a community-based organization	Add mentorship to the referral tool

Referral Status Populate the Dashboard

Use the reporting system dashboard to access a list of customers who still need a referral based on their Service Needs Assessment or have referrals that still require a response.

Referrals		
Customers that do not require a referral ℹ	5	6%
Customers Current Referral Status		
Referral(s) was sent and has not received a response, or has a pending response ℹ	0	0%
A referral is required based on the Service Needs Assessment, but one has not been sent ℹ	18	24%
Open Referral(s) was sent; no response from service provider after 10 days ℹ	13	17%
Referral(s) was sent, service provider responded, but customer has not responded to the service provider ℹ	0	0%
Referral(s) was sent and received a response as accepted, rejected, or closed ℹ	6	8%
Total Referrals Made (Hide)	44	
# of customers with at least one referral for **Housing Assistance**	6	
# of customers with at least one referral for **Transportation**	8	
# of customers with at least one referral for **Dependent Care**	4	
# of customers with at least one referral for **Legal Aid**	8	
# of customers with at least one referral for **Health Care**	7	
# of customers with at least one referral for **Uniforms**	4	
# of customers with at least one referral for **Other Support Services**	12	