

Transferring Customers

If you are adding a customer into the system and you are notified that a record already exists for that customer with another organization, you may notify the existing provider that the customer is requesting to enroll with your organization.

Check the box and click the Save button to notify the provider.

The system will then indicate that the transfer request was sent.

The screenshot shows a web application interface for adding a customer. A modal dialog box is open, titled "RECORD ALREADY EXISTS FOR GARVEY WIND ENERGY". The dialog contains the following text: "Note: A record for this customer already exists with another organization." Below this is a checkbox labeled "Notify existing provider that the applicant is requesting to enroll with my organization." At the bottom of the dialog are two buttons: "Save" (highlighted in blue) and "Close".

The background form, titled "ADD CUSTOMER", includes the following fields:

- First Name *
- Last Name *
- Phone
- Email * (walter@noemail.com)
- Street Address 1 * (306 Adams)
- Street Address 2
- City * (Springfield)
- State * (Illinois)
- ZIP Code * (62701)
- Type * (Inquiry)
- Provider * (Telger Solar Company, Inc. - 236 Prairie Grass Road Chatham IL 6262)
- Navigator (Select)
- Follow-Up Date (xx/xx/xxxx)

A "Submit" button is located at the bottom left of the form.

Once the transfer request has been initiated, an email will be sent to the organization

Sent from TEST environment; recipient list has been altered.

Recipient list was: **david.garvey@siu.edu; caps.telger@noemail.com; johnsmith@noemail.com**

Request:

Telger Solar Company, Inc. has requested a customer [Walter Davis](#) be transferred from Garvey Wind Energy to Telger Solar Company, Inc..

Next steps:
CEJA staff will notify the grant manager and grantee organizations about this request.

Illinois workNet Team

The responding organization will then see a button to Respond to Request on that customer’s Intake page:

CEJA REPORTING SYSTEM INTAKE

Progress

Intake

Referral

Program Completion/Follow-Up

INTAKE

Profile: Walter Davis

Email Walter@noemail.com

DOB 10/1/2004

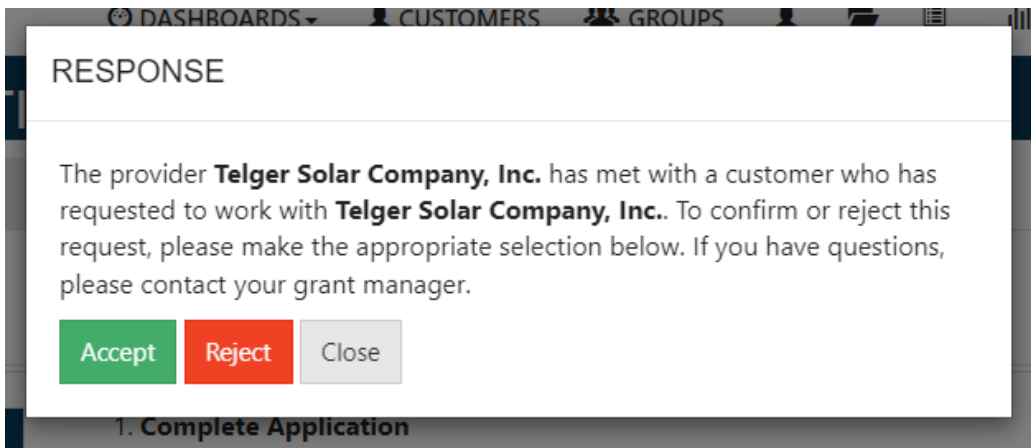
Last 4 SSN N/A

[See All](#)

1. **Complete Application**
 - [Prescreening Information](#)
 - [View Application Completed on 5/3/2023](#)
 - Requires Funds for Completing Intake
2. **Career Assessment**

Respond to Request

Add Career Assessment



Once accepted, the customer will appear in your customer list.

If Rejected, the request will disappear. If you have questions about the transfer, please contact your grant manager.

Dashboard

You can see if you have any customer requests by going to the Dashboard.

The row titled “Respond to Transfer Requests” indicates the number of customers who have been requested for transfer by other organizations.

Select the hyperlinked number to display a list of those customers.

Select their name and intake tab to respond to the request.

Section	#	%
Outreach		
Customers with Inquiry Status ¹	38	14%
Prescreening Complete and results indicate Eligible and Interested in participating ²	169	63%
Follow-up is past due ³	1	0%
Prescreening has not been completed within 30 days ⁴ Next Steps	38	14%
Respond to Transfer Requests ⁵	3	1%
Do Not Contact ⁶	17	6%
Prescreening Results indicate Not Eligible or Not Interested ⁷	7	2%