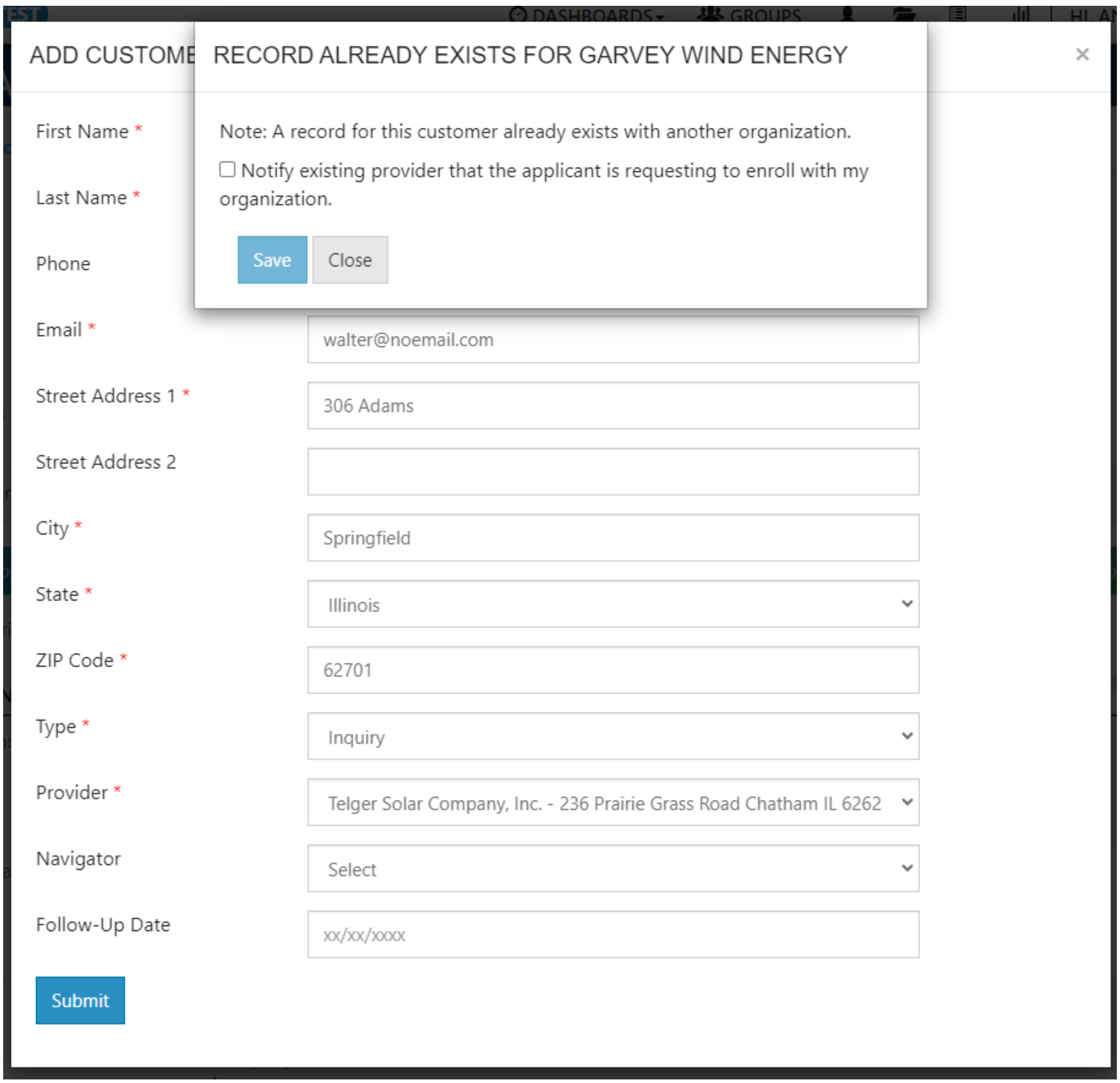
Transferring Customers

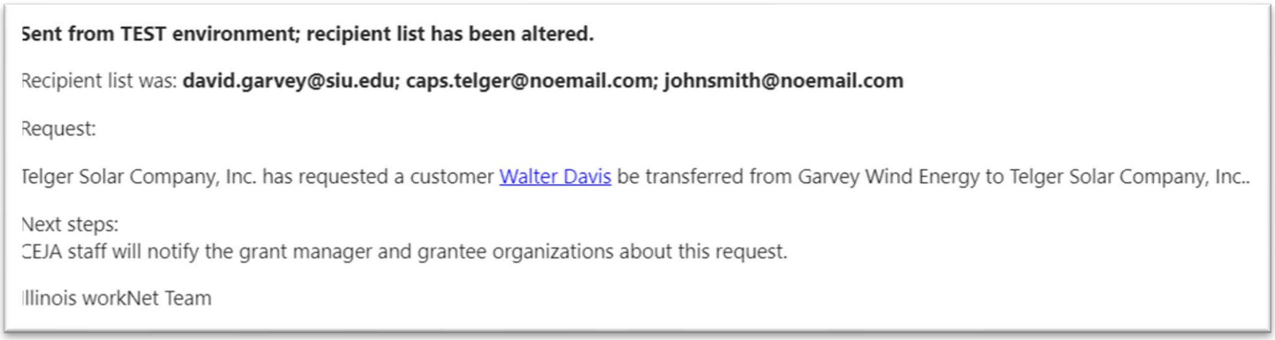
If you are adding a customer into the system and you are notified that a record already exists for that customer with another organization, you may notify the existing provider that the customer is requesting to enroll with your organization.

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

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



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**

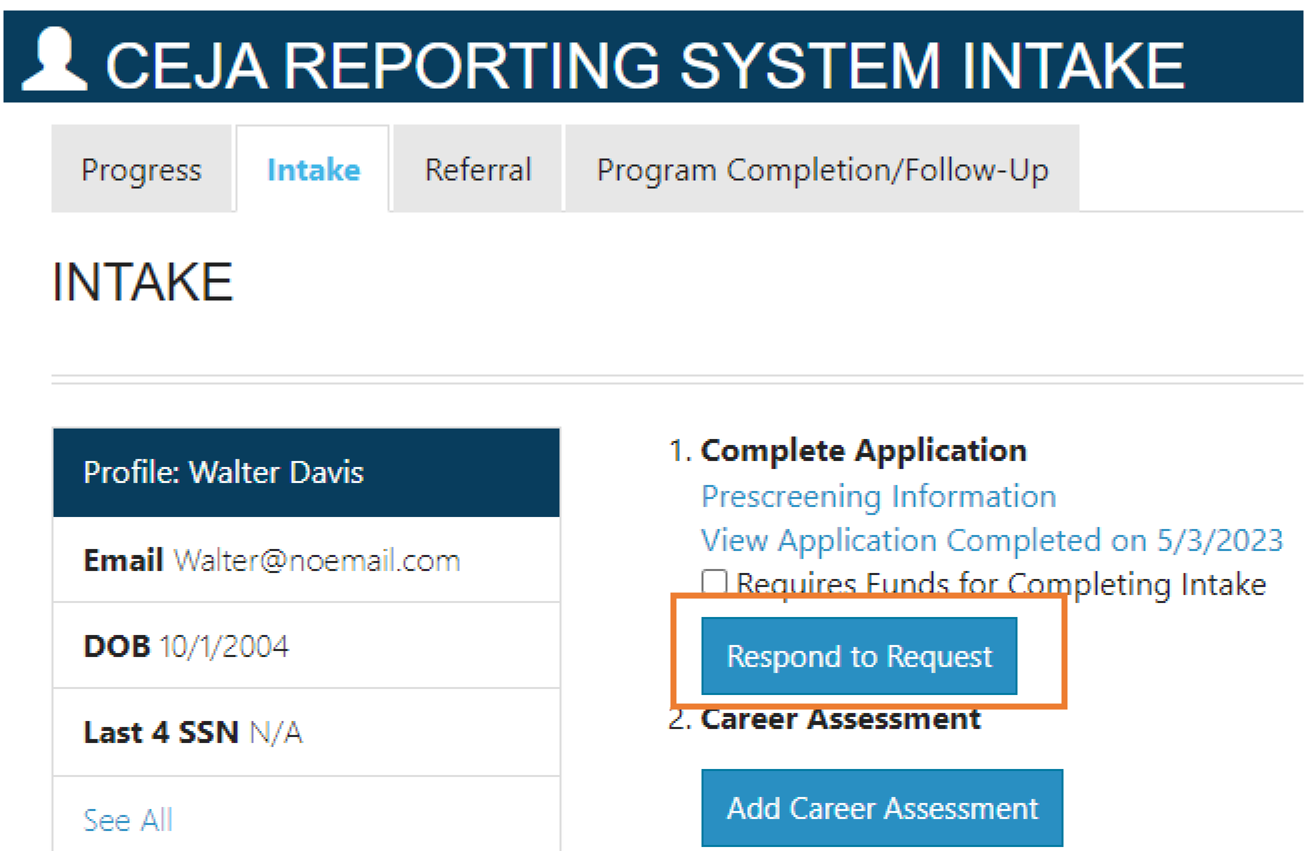
Request:

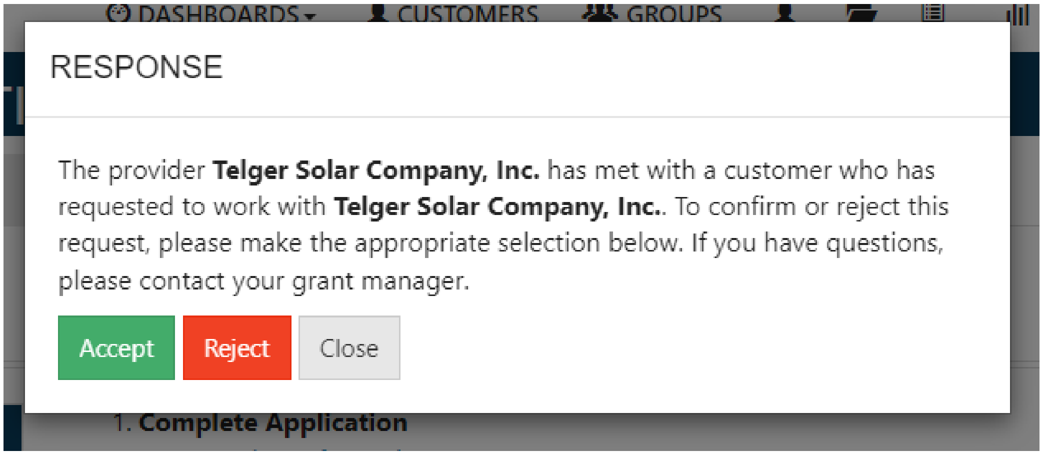
Telger Solar Company, Inc. has requested a customer Walter Davis be transferred from Garvey Wind Energy to Telger Solar Company, Inc..

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:





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 they hyperlinked number to display a list of those customers.

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