JOB TRAINING & Economic Development

Add Referrals

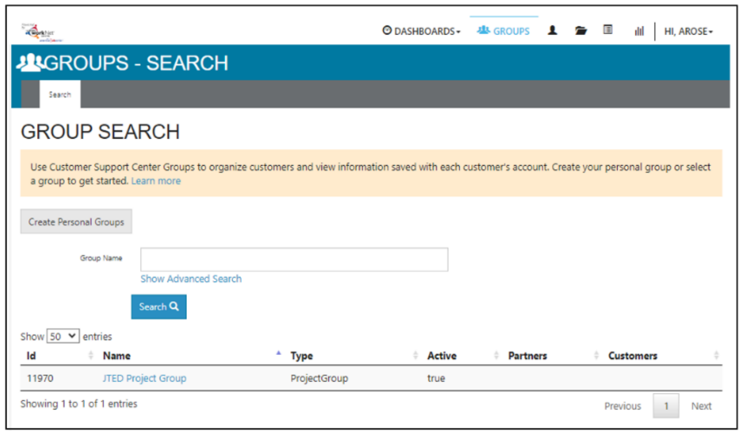
September 2024 v3

Overview

To add or edit a referral for a customer, they must be added to the JTED reporting system. After the intake process is completed, referrals may be created for a customer.

Access Participant Details

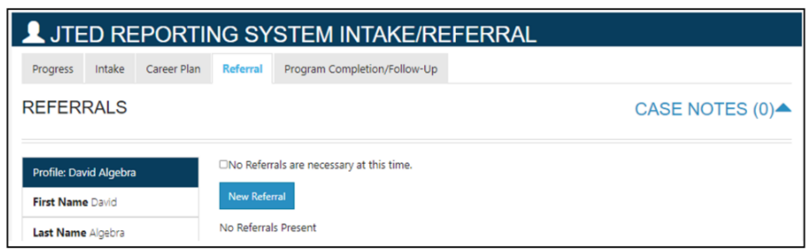
1. Log into www.illinoisworknet.com
2. Select My Dashboard
3. Select Customer Support Center/IWIS in the partner tools section
4. Select Groups from the top menu
5. Select JTED Project Group
6. Select the customer's name.



Create a New Referral

To add a new referral, click the Referral tab on the customer profile.

- Click New Referral
- There are 3 steps to create a new referral.

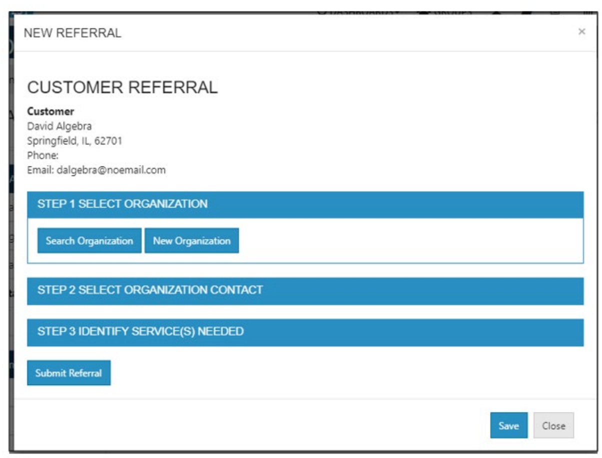


Step 1 - Select the Organization

Existing Organization

To add an existing organization, click Search Organization.

- Click Select next to the existing organization to be added.
- **Note**: If you search for an organization, the organizations that were previously entered will display. Additionally, you can create a new organization to display in this list.

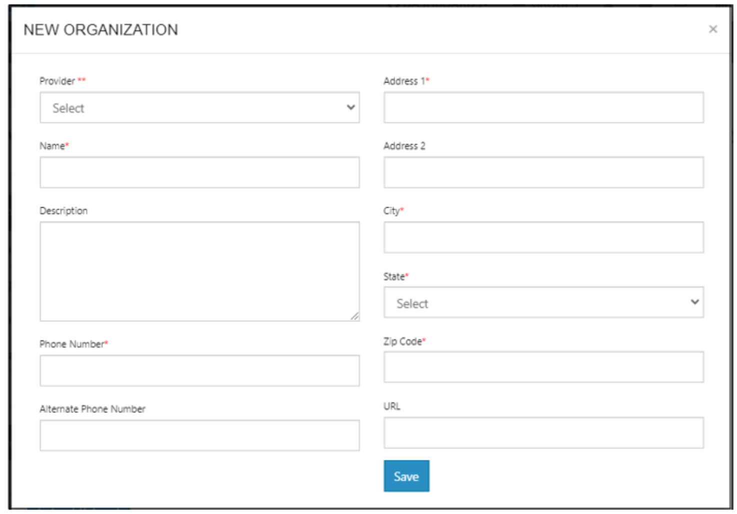


Create New Organization

To add a new organization, click New Organization.

The following information is needed to be completed:

- Provider
- Name
- Description
- Phone Number
- Address
- City
- State
- Zip Code
- URL
- Click Save

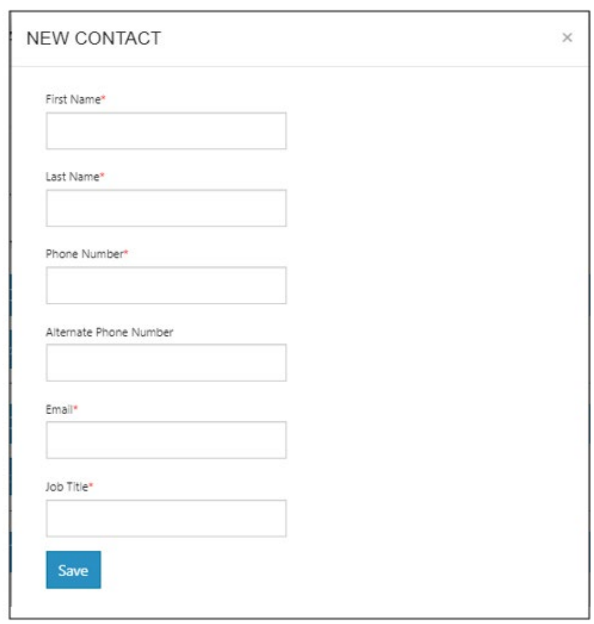


Note: Once a "New Organization" has been added, it will then show up in the organization search.

Step 2 – Select Organization Contact

To add an existing contact, click Search Contact.

- Click Select next to the existing contact to be added.
- **Note**: If you search for a contact, the contacts that were previously entered will display. Additionally, you can create a new contact to display in this list.



Create New Contact

To add a new contact, click New Contact.

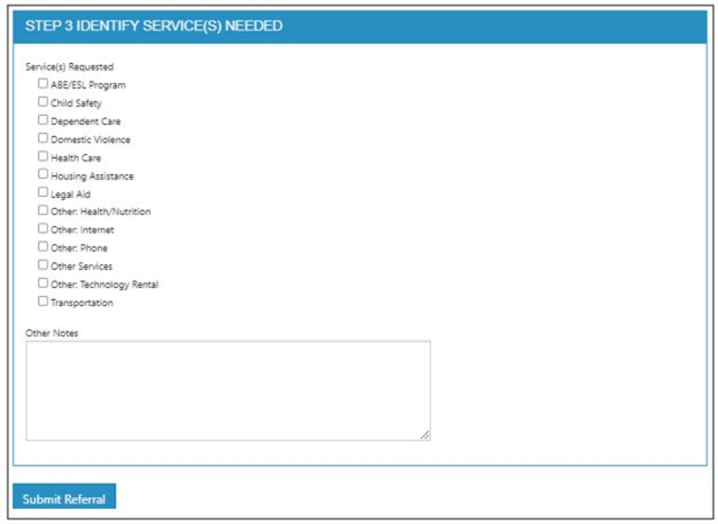
The following information is needed to be completed:

- First Name
- Last Name
- Phone Number
- Email
- Job Title
- Click Save

Note: The contact will now appear in the search where you can select them.

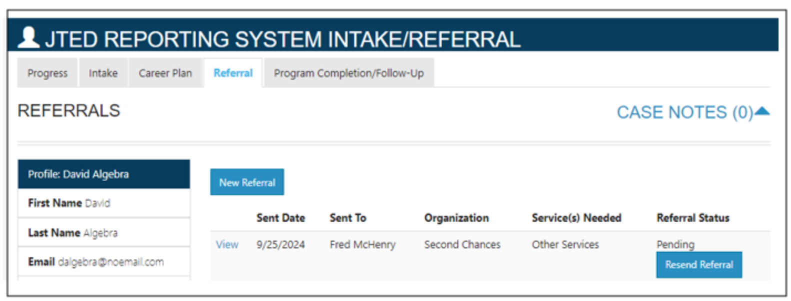
Step 3 – Identify Service(s) Needed

Click the title to open the services section.
Select the service(s) requested for the customer by clicking the box.



- ABE/ESL Program
- Child Safety
- Dependent Care
- Domestic Violence
- Health Care
- Housing Assistance
- Legal Aid
- Other: Health/Nutrition
- Other: Internet
- Other: Phone
- Other Services
- Other: Technology Rental
- Transportation
- Other Notes
- Click Submit Referral

The Referral page will refresh, and the referral that was created will display in the table below the New Referral button. The Referral will be sent via email to the contact. It will include the customer's name, referring organization, and a prompt to respond within 5 business days.
The contact will be provided a link with further information about the referral and the ability to respond and add a note.



Once they have responded, the referral status will update on the Referral page.

View/Edit Referrals

- To view a referral, click the View button.
- To cancel a sent referral, click Cancel Sent Referral. Below the button is a text box to provide a reason for the cancellation. Once the request has been cancelled, the referral status in the table will be updated to "Cancelled".
- To resend a referral, click Resend Referral. The referral will then be emailed to the contact provided.