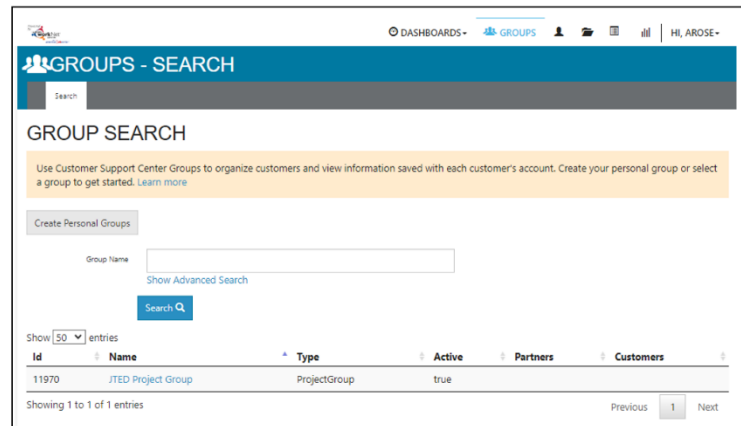


Overview

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

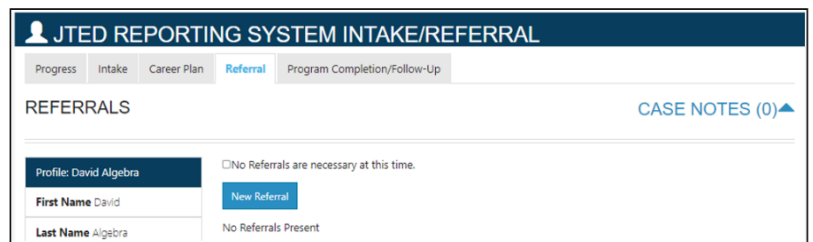
1. Log into www.illinoisworknet.com
2. Select **My Dashboard**
3. Select **Customer Support Center/IWIS** in the partner tools section
4. Select **Groups** from the top menu
5. Select **JTED Project Group**
6. Select the **customer's name**.



Create a New Referral

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

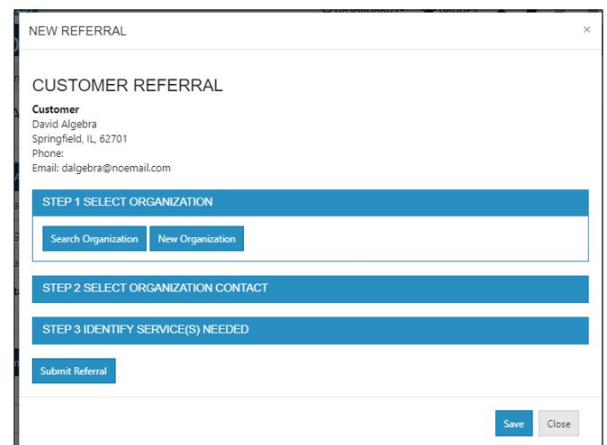
- Click **New Referral**
- There are 3 steps to create a new referral.



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.



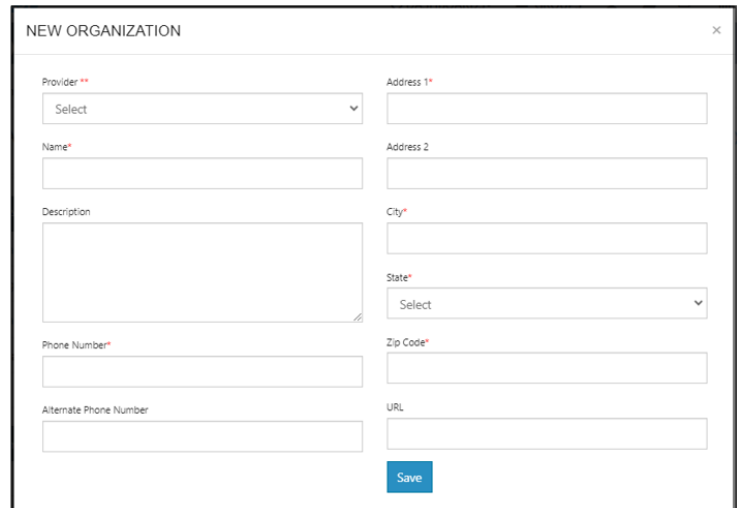
Create New Organization

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.



The screenshot shows a web form titled "NEW ORGANIZATION" with a close button (X) in the top right corner. The form contains the following fields:

- Provider****: A dropdown menu with "Select" as the current option.
- Address 1***: A text input field.
- Name***: A text input field.
- Address 2**: A text input field.
- Description**: A large text area for a detailed description.
- City***: A text input field.
- State***: A dropdown menu with "Select" as the current option.
- Phone Number***: A text input field.
- Zip Code***: A text input field.
- Alternate Phone Number**: A text input field.
- URL**: A text input field.

A blue "Save" button is located at the bottom right of the form.

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.

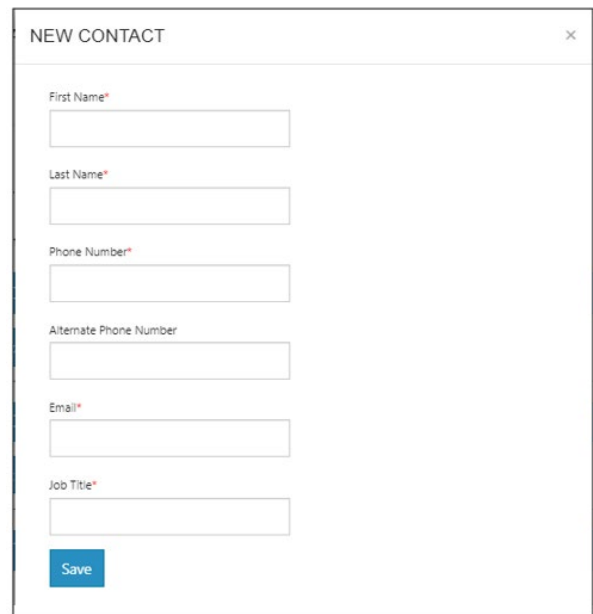
Create New Contact

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.



The screenshot shows a web form titled "NEW CONTACT" with a close button (X) in the top right corner. The form contains the following fields:

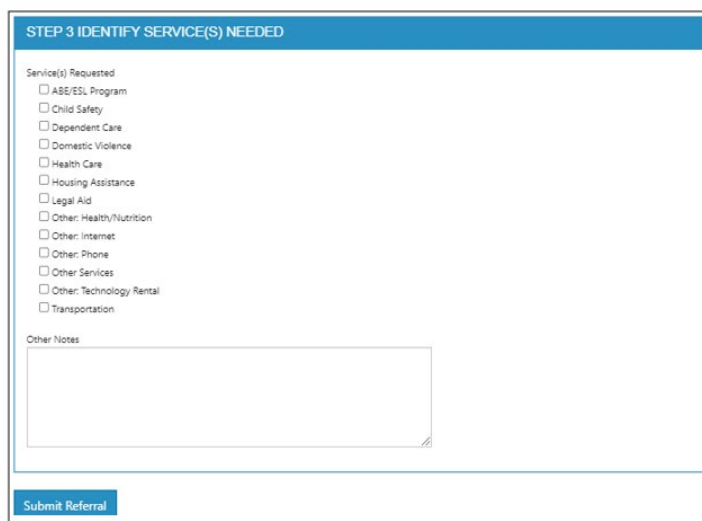
- First Name***: A text input field.
- Last Name***: A text input field.
- Phone Number***: A text input field.
- Alternate Phone Number**: A text input field.
- Email***: A text input field.
- Job Title***: A text input field.

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

Step 3 – Identify Service(s) Needed

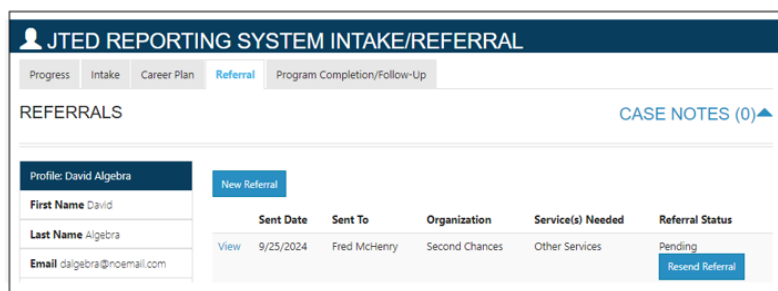
Click the title to open the services section. Select the service(s) requested for the customer by **clicking the box**.

- 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.



Profile	Sent Date	Sent To	Organization	Service(s) Needed	Referral Status
David Algebra	9/25/2024	Fred McHenry	Second Chances	Other Services	Pending

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.

The Illinois workNet Center System, an American Job Center, is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment by calling TTY (800) 526-0844 or 711. This workforce product was funded by a grant awarded by the U.S. Department of Labor’s Employment and Training Administration. For more information, please refer to the footer at the bottom of any webpage at illinoisworknet.com.