

# Referral System

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# BACKGROUND

The Illinois workNet system has developed referral solutions for special programs such as EPIC, JTED, and ISETS. These tools allow staff to refer customers to partners in a real-time secure environment that can control the information shared using roles and access levels. The information is stored in the system with the customer account so there is one central place to view referrals, consent forms, and referral responses. This information has been used to populate dashboards, reports, and required forms and trigger when action is needed.

The proposed enhancements will be available for special program reporting tools as well as set up to be a standalone module that will connect partners using the Illinois workNet platform.



## **INTEGRATED MODULE IN REPORTING SYSTEM TOOLS**

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Access referral tools that have been integrated into program reporting tools.



## **STANDALONE REFERRAL SYSTEM**

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Access referral tools through a standalone module that connects partners using the Illinois workNet platform.

# ACCESS THROUGH REPORTING SYSTEM TOOLS

- Create a Referral
- Referral History with Show/Hide Thread
- Add/View Referral Consent Status
- Aligned to Service Needs Assessment

CEJA Program Tools

Garvey, David

Progress Intake Career Plan **Referral** Program Completion/Follow-up

**Profile: David Garvey**  
 workNet ID:  
 Last 4 SSN:  
 UserName:  
 Email:  
 Account Created:

[Reset Password](#)

[Send Message](#)

**Summary Tools**  
[Program History](#)  
[Resumes](#)  
[Worksites](#)  
[Case Notes](#)  
[Career Plan Tools](#)

**Required Referrals**  
 The following referrals are required based on the customers Service Needs Assessment.

- Referral for Transportation Assistance - **Red Flag**
- Referral For Child Care - **Needs Attention**
- Provide cost coverage for application fee in-house - **Good**

[Search Provider/Programs & Create a Referral](#)

**Referral History**  
[Export Referral History](#) Search

#	Referred To	Program	Referred From	Sent Date	Status	Response Date	Last Updated
1	HIRE360	Climate Works	National Able	6/1/2023	Attempting Contact	7/15/2023	7/15/2023
2	OAI	CSBG	National Able	8/1/2023	Sent	8/1/2023	8/1/2023
3	IDES	Employment Services	National Able	8/1/2023	Referral Received	8/4/2023	8/4/2023
3.1	IDES	Employment Services	National Able	8/1/2023	Sent	8/1/2023	
3.2	IDES	Employment Services	National Able	8/1/2023	Resent	8/4/2023	
3.3	IDES	Employment Services	National Able	8/1/2023	Referral Received	8/4/2023	

Expands to show conversation thread

**Referral Consent Agreements**  
[Add Referral Consent](#)

Update	Referred To	Referred From	Start Date	Status	Expiration Date
<a href="#">Edit</a>	OAI	National Able	8/1/2023	Current	8/1/2023
<a href="#">Edit</a>	IDES	National Able	8/1/2023	Revoked	8/15/2023

# ACCESS THROUGH A STANDALONE MODULE

- Available to Illinois workNet partners through partner tools and custom direct URL.
- Partners & Programs are set up in the system.
- Includes a full list of providers & programs that can be searched and filtered by services offered.
- View details and create a referral from this point.

A Web Page

http://

## Referral System

Dashboard Provider/Program List Referral Search Reports

**Search By**

Provider Name

Program

Services Offered

Accepting Referrals

Location

[Search](#) [Export](#) [Add/Edit Provider/Program](#)

Provider	Address	Program	Accepting Referrals	Last Updated	Details
Garvey Wind	123 Street, Springfield, IL	Apprenticeship IL	Yes	mm/dd/yyyy	<a href="#">View</a>
Garvey Wind	123 Street, Springfield, IL	CEJA	Yes	mm/dd/yyyy	<a href="#">View</a>
Garvey Wind	123 Street, Springfield, IL	FEJA	Yes	mm/dd/yyyy	<a href="#">View</a>
CBO3	45 North Street, Springfield, IL	Illinois Works	Yes	mm/dd/yyyy	<a href="#">View</a>
LLCC	45 North Street, Springfield, IL	ABE (Title II)	Yes	mm/dd/yyyy	<a href="#">View</a>
CBO5	910 South Street, Springfield, IL	Other	Yes	mm/dd/yyyy	<a href="#">View</a>

### Provider/Program

#### Provider Information

Provider Name: CBO3  
Provider Address: 45 North Street  
Springfield, IL 62704  
[Get Directions](#)  
[See more details](#)

#### Program Information

Program: Illinois Works  
Program Description: (About the program) Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim  
Eligibility Criteria: Illinois Resident  
Age: 18+  
High School Diploma/GED  
Services Provided: Childcare  
Transportation

#### Contact Information

Primary Contact: Person Name, Title  
Email  
Phone  
Secondary Contact: Person Name, Title  
Email  
Phone


[Create Referral](#) [Print Information](#)

# PARTNER SENDS A REFERRAL

- Select a customer or add a customer in real time without requiring an email verification process.
- Select “Refer To” partner.
- Select “Program” offered by the partner.
- Select “Services Need” offered with the program.
- Enter “Other Notes” as needed.
- Select “Appointment Time” if available in the system.
- Complete “Customer Consent” if one is not on record in the system.
- Option to print the referral for the customer.
- Send the referral.

CEJA Program Referral (opens in a new window/tab)

http://



**Partner Referral** *Title or Subheadline goes here*

**David Garvey**  
Username: dgarvey23 Phone: 217-895-8989  
DOB: 01/02/2000 Email: dgarvey@noemail.com  
Veteran

Refer To

Program

Services Requested  
 Child Care  
 Housing  
 Transportation  
Coverage of Transportation Cost  
Accessible Transportation

Notes:

Select Appointment Time  
 9/18/2023 9:00-10:00  
 9/19/2023 11:00-12:00  
 9/21/2023 1:00-2:00  
 9/22/2023 9:00-10:00  
 9/30/2023 9:00-10:00  
 Request a different time

Customer Consent:  
Active Date for this provider: 8/15/2023

[Send Referral](#) [Print Referral](#)

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# WHAT HAPPENS NEXT





- The submitted customer referral populates partner dashboards.
- An email with a link to the customer referral is sent to the program's primary contact. (Login not required.)
- The customer can view their referrals in their account.



# PARTNER RESPONDS TO A REFERRAL

- Display minimal customer PII.
- Review “Refer From” partner.
- Review “Services Requested”.
- Contact the customer and determine the next steps.
- Select “Referral Status” and enter notes as needed. Options are shown since we are trying to determine referral status types.
- Option to print the referral for the customer.
- Send the referral response.



## Partner Referral

*Title or Subheadline goes here*

**David Garvey**  
Phone: 217-895-8989  
Email: dgarvey@noemail.com  
Veteran

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**Referral From:**

Sent mm/dd/yyyy  
Provider:  
Program:  
Program Staff Name  
Program Staff Email  
Program Staff Phone

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**Referral To:**

Provider: CBO3  
Program: Illinois Works

Primary Contact Name: Natasha Telger  
Primary Contact Email: ntelger@noemail.com  
Primary Contact Phone: 217-451-8956

Customer Consent: Active Date for this provider: 8/15/2023

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**Appointment Time**

9/19/2023 11:00-12:00

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**Services Requested**

Transportation

Notes: Text from the initial referral goes here.

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**Referral Status**

Select a Referral Response:

- Referral Received** (Confirmation-receiving partner has reviewed the record.)
- Attempting Contact** (Connection-receiving partner is trying to make with customer three attempts required.)
- Referral in Progress** (Engagement-the customer is engaged and awaits next steps, i.e., registered for orientation, testing, paperwork, etc.)
- Referral Completed** (Successful Completion-receiving partner indicates that a customer has attended an orientation, was enrolled, or received services.)
- Referral Closed** (Customer did not show up to orientation or did not receive services/receiving partner attempted to contact three times without success.)

Notes:

[Submit Response](#) [Request Provider Update](#) [Print Referral](#)

If the referral from staff is submitting/updating a response on behalf of the referred to provider, require a comment to be added in the notes.

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# WHAT HAPPENS NEXT



- The submitted referral response is saved in the system.
- Partner dashboards are updated based on the referral status.
- The customer can view their updated referrals in their account.





# DASHBOARDS & REPORTS

- Dashboard provides a high-level overview of referral status.
- Partners can search for customers referred from or to their organization.
- Filter by program, provider status, sent, and last updated.
- View referral details and create a referral from this point.
- Access reports for partner network, incoming or outgoing referrals.

A Web Page

http://

## Referral System

Dashboard Customer Referrals Provider/Program List Reports

**Search By**

Customer Name

Referred From Provider

Referred From Program

Referred To Provider

Referred To Program

Referral Status

Referral Initial

Sent Date   
Past 7 days  
Past 30 days  
Past 60 days  
Past 90 days  
Past 180 days  
Past year

Last Updated   
Today  
Past 7 days  
Past 30 days

Advanced Search

Search Export Add Referral

Show 10 entries

Last Name	First Name	Referred From	Referred To	Program	Referral Status	Referral Sent Date	Last Updated	View Referral
<a href="#">Garvey</a>	David	Man-Tra-Con	IDES	Employment Services	Cancelled	6/1/2023	7/15/2023	<a href="#">View History</a>
<a href="#">Monroe</a>	Esther	National Able	OAI	CSBG	Sent	8/1/2023	8/1/2023	<a href="#">View History</a>
<a href="#">Monroe</a>	Esther	National Able	IDES	Employment Services	In process	8/1/2023	8/15/2023	<a href="#">View History</a>

**Examining Data Visuals**

- Incoming
- Outgoing
- Referrals this week
- 5 referrals accepted
- avg response time

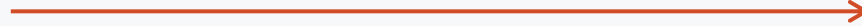
**Example Reports**

- **Partner Network Referrals Report** - Use this report to explore the status and outcome of referrals sent from your organization as well as the number of referrals partners have sent and received.
- **Incoming Referrals Report** - Use this report to explore referrals received by your organization as well as the status and outcome of those referrals
- **Outgoing Referrals Report** - Use this report to explore referrals sent by your organization as well as the status and outcome of those referrals.

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# REFERRAL FOLLOW-UP

- Partner reviews the dashboard and reports to identify referrals that require follow-up.
- Send a Referral follow-up email through the system.
- The follow-up is recorded in the referral history.

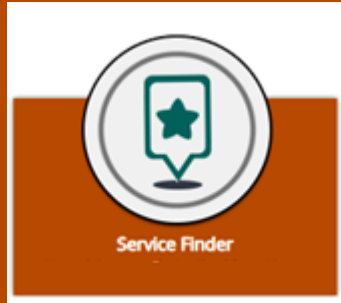


- Partner updates the referral and submits the referral response.
- Referral information is saved in the system and the dashboard is updated based on the referral status.
- The customer can view their updated referrals in their account.

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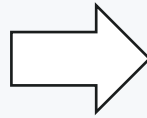
# MANAGEMENT TOOLS

## PARTNERS & PROGRAMS



Approved partners can maintain their organization, special program, and referral information in the Service Finder.

This information will populate the Service Finder search results and the referral system.



## REFERRAL SYSTEM



**INTEGRATED MODULE**



**STANDALONE SYSTEM**

# SERVICE FINDER ADMINISTRATION

[Return to My Sites](#)

[Referral Information](#)
[WIOA Information](#)
[Physical Location Information](#)
[Contacts](#)
[Social Media](#)
[Organization Type & Funding](#)
[Audience and Services](#)
[Special Programs](#)
[Preview](#)
[Timeline](#)

LWIA: 14  
ID: 5990

**123 Test Service Location**

1234 Main Street  
Suite 300  
Springfield IL 62703-1234

Created: 01/07/2020 12:36:59  
Last Updated: 01/15/2020 10:25:35

Move this offer audience and services

## Referral Information

Please identify the type of location you are entering:

- Work Support Referrals** help people in need of specialized assistance and support. Referrals are an essential component of assistance and complement the Illinois workNet System Network, without being an Illinois workNet partner. With the Illinois workNet portal, these are identified within the following categories:
  - Child Care
  - Assistance for Persons with Disabilities
  - Financial Assistance
  - Food/Nutrition
  - Health Care
  - Housing/Shelter
  - Immigrant Assistance
  - Re-Entry (of formerly incarcerated individuals into the workforce)
  - Transportation
  - Veterans
- Illinois workNet Partners** - These are locations that offer in-person assistance to help individuals and employers achieve their training and employment goals. Illinois workNet Partners may also provide and/or receive work support referrals, but are not required to do so.

Identify the type of site\*:  Work Support Referral  Illinois workNet Partner

[Save and Continue](#)

When they are setting up their site for the first time the bottom table is not populated with programs. Include a message to let the user know their programs will populate the referral section and provide some information about how referrals work in Illinois workNet.

Their organization will be the first to populate the referral table. As programs are added, they will populate the referral table.

## Active Program Referral List

Program Name	Accepting Referrals	Appointment Times	Last Update
123 Test Service Location	Yes	<a href="#">View/Add</a>	mm/dd/yyyy <a href="#">Edit</a>
Apprenticeship Illinois	Yes	<a href="#">View/Add</a>	mm/dd/yyyy <a href="#">Edit</a>
Climate Works	Yes	Appointment Times <a href="#">View/Add</a> opens the appointment tool in a new window	mm/dd/yyyy <a href="#">Edit</a>
Illinois Works	Yes		mm/dd/yyyy <a href="#">Edit</a>
JTED	Yes		mm/dd/yyyy <a href="#">Edit</a>
ISETS	Yes	<a href="#">View/Add</a>	mm/dd/yyyy <a href="#">Edit</a>
DHS Youth	Yes	<a href="#">View/Add</a>	mm/dd/yyyy <a href="#">Edit</a>

# SERVICE FINDER: SOURCE FOR PROVIDER & PROGRAM INFORMATION

The bottom table is not populated with programs when initially setting up the partner in the Service Finder.

A message is displayed to let the user know their programs will populate the referral section and include Illinois workNet Referral System learning resources.

The partner organization will be the first to populate the referral table. As special programs are added, they will populate the referral table.

# PROGRAMS: BUILD OUT SPECIAL PROGRAMS AREA

- Add program description (new)
- Add more eligibility criteria
- Must be Authorized to work in the United States (new)
- Must meet Selective Service requirements (new)
- Income: (new)
  - Low Income
  - Moderate Income
- Must be an Illinois Resident (new)
- High School Diploma/GED (new)
- Other (new): Include a text box where they can enter specifics such as education level, employment status, drug test, background checks, etc.
- Identify services for special programs.
- Add program primary/ secondary contact information of those identified to receive the referral email notifications (new).

**SERVICE FINDER ADMINISTRATION**

Return to My Sites

Referral Information | WIOA Information | Physical Location | Contacts | Social Media | Organization Type & Funding | Audience and Services | Special Programs | Preview | Timeline

WIOA: 14  
 ID: 1990  
**123 Test Service Location**  
 1234 Main Street  
 Suite 100  
 Springfield IL, 62703-1234  
 Created: 01/07/2020 12:36:59  
 Last Updated: 01/15/2020 18:25:35

**Special Programs**

If you are participating in a special state-funded program, for example EPC or Apprenticeship PLUS, click the "Add Program" button below. You can add as many special programs as you need to; if you are not participating in a state-funded special program, you can click "Next" to continue.

Program Name	Program is Active	Accepting Referrals	Funding Type	Last Update	Remove	Edit
Apprenticeship Illinois	True	Yes	DCED Funded	mm/ll/yyyy	Remove	Edit
Climate Works	True	Yes	CEIA	mm/ll/yyyy	Remove	Edit
Illinois Works	True	Yes	DCED State Funded	mm/ll/yyyy	Remove	Edit
ITED	True	Yes	DCED State Funded	mm/ll/yyyy	Remove	Edit
IBETS	True	Yes	INS SNAP	mm/ll/yyyy	Remove	Edit
IBYS Youth	True	Yes	IDHS State Funded	mm/ll/yyyy	Remove	Edit

Program Name\*:

Program Description\*:

Is the program active?  Yes  No

Accepting Referrals?  Yes  No

Funding Sources (Check all that apply):

- Community Service Block Grant
- Digital Divide
- Perkins K-12
- Perkins Postsecondary
- WIOA
- WIOA Youth
- Workforce Innovation
- Other

Select special populations served by this program. (Check all that apply):

- Select / Deselect All
- Domestic Violence Victim
- English Language Learner
- Homeless
- Individuals Experiencing Homelessness
- Individual with a Disability
- Last Off Worker
- LGBTIQ+
- Mature Worker
- Re-Entry Person
- Seasonal Farmworker
- Sexual Assault Victim
- Veteran

Eligibility\*

- Adult
  - Min. Age:  Max. Age:
- Youth
  - Min. Age:  Max. Age:
- Must be Authorized to Work in United States
- Must meet Selective Service Requirements
- Income: Low Income
- Income: Moderate Income
- High School Diploma/GSE
- Other

Select all the counties served by this program\*

Available Counties:  Selected Counties:

Services\*: Click "Add Services" to add additional services, or choose a service to edit or delete.

[Add Services](#)

Program Contact\*: A minimum of one contact is required.

Last Name	First Name	Phone	Extension	Email	Contact Type	Primary	Remove	Edit
Williams	Sam	217-888-9789		email@server.com	Secondary	<input type="checkbox"/>	Remove	Edit
Salve	Pat	217-888-9190		Femail@gmail.com	Primary	<input checked="" type="checkbox"/>	Remove	Edit

[Add Contact](#)

[Save and Add Another Program](#) [Save](#) [Cancel](#)

## Add Services

Select the services you would like to add, then click the "Add Services" button. Note that some services that are offered in different counties, into services.

### Services for Individuals

- Child Care
- Disability Services
- Education and Training
- Emergency Needs/Crisis
- Financial Literacy
- Food/Nutrition
- Housing
- Job & Career Readiness Services
- Legal Assistance
- Medical Care
- Mentoring
- Recreation
- Referrals & Assistance
- Technology Available
- Translation Services
- Transportation
- Unemployment Services
- Workshops and Seminars