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### Purpose:

The purpose of these transfer tools within the CEJA reporting system is to manage and track transfer program inquiries by directing them to either non-CEJA programs or CEJA programs or placing them on a waitlist for a CEJA program. Additionally, it facilitates the transfer of inquiries/applicants from a waitlist to alternative CEJA grantees or navigators, ensuring a streamlined and organized process.

### Who Enters/Maintains Data

- Grantees and Navigators will have the ability to initiate and respond to transfer requests.

### Access CEJA Reporting System

1. Log into [www.illinoisworknet.com](http://www.illinoisworknet.com)
2. Select **My Dashboard**
3. Select **Customer Support Center** under Partner Tools.
4. Select **Groups** in the top menu
5. Select the group **CEJA/FEJA Programs**.

### Initiate a Transfer Request When Adding a Customer

If the customer is already in the CEJA Reporting System with another grantee/provider, when you submit the information from the Add Customer window, you will see the following screen:

RECORD ALREADY EXISTS FOR COMMUNITY PARTNERSHIP

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Note: A record for this customer already exists with another organization.

Notify existing provider that the customer is requesting to enroll with my organization.

To initiate the transfer request:

1. Check the box next to “Notify existing provider that the customer is requesting to enroll with my

- organization.
2. Select your organization from the Navigator or Provider dropdown (**Note:** Only one may be selected if you have access to both Navigator and Provider roles).
  3. Enter a Reason for Request.
  4. Then click the Save button.

RECORD ALREADY EXISTS FOR COMMUNITY PARTNERSHIP

Note: A record for this customer already exists with another organization.

Notify existing provider that the customer is requesting to enroll with my organization.

Navigator  ▼

Provider  ▼

Reason for Request

You will then see a prompt that the request has been sent:

testapps.illinoisworknet.com says

Transfer request sent.

Notify existing provider that the customer is requesting to enroll with my organization.

Navigator  ▼

Provider  ▼

Reason for Request

### Notification to Respond to Transfer Requests

Once the request has been submitted, the customer will appear in the other navigator or grantee's row for "Respond to Transfer Requests". The navigator/grantee should check the dashboard daily.

Section	#	%
<b>Outreach</b>		
Customers with Inquiry Status <b>3</b>	12	13%
Prescreening Complete and results indicate Eligible and Interested in participating <b>5</b>	56	65%
Follow-up is past due <b>3</b>	3	3%
Prescreening has not been completed within 30 days <b>3</b> <a href="#">Next Steps</a>	5	5%
Respond to Transfer Requests <b>3</b>	2	2%

When they select the hyperlinked number in that row, a new tab will open with a list of the customer(s) who have been requested for transfer.

### Respond to Transfers of Customers with Inquiry Status

If they have an Inquiry status, a navigator/grantee may respond:

1. Select the customer's name from the list.
2. In the prescreen window that opens, select the button to respond to the inquiry request.
3. Select Accept to transfer the customer to the new navigator/grantee or Reject to keep the customer in your customer list.

10 entries per page

IdN	Last Name	First Name	Navigator	Provider	Customer Status	Training Program	Program Completion Status	Employment/Post secondary Status	Last Updated
35963	Bird	Rhea		Community Partnership	Application	CEJA - Climate Works	Not Exited	Not Placed	03/04/2025
0	<b>Crockett</b>	Davis		Community Partnership	Inquiry		Not Exited	Not Placed	04/04/2025

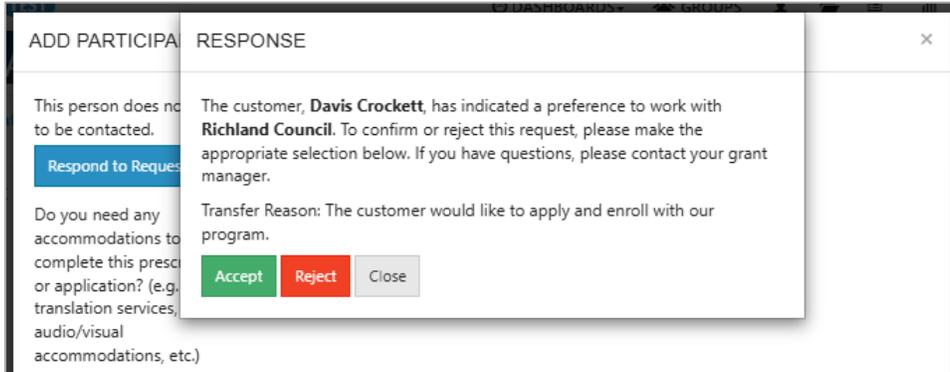
Showing 1 to 2 of 2 entries

**ADD PARTICIPANT PRE SCREENING** ×

This person does not wish to be contacted

**Respond to Request**

Do you need any accommodations to  Yes  No



### Respond to Transfers of Customers with Prescreening or Applicant Status

If they have a Prescreening or Applicant status, a navigator/grantee may respond:

1. Select the customer's name from the list.
2. Select the Intake tab.
3. Select the button Respond to Request.
4. Select the button accept to transfer the customer to the new or reject to keep that customer in your customer list

10 entries per page

IwN ID	Last Name	First Name	Navigator	Provider	Customer Status	Training Program	Program Completion Status	Employment/Post secondary Status	Last Updated
36110	Crockett	Davis		Richland Council	Application	CEJA - Workforce Hubs	Not Exited	Not Placed	04/04/2025

Showing 1 to 1 of 1 entry

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

### INTAKE

**Profile: Davis Crockett**

**Email**  
davisrockett@noemail.com

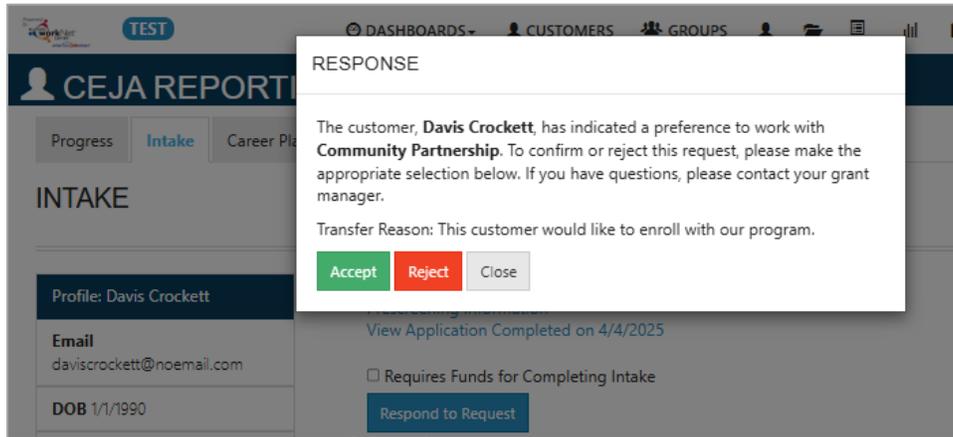
**DOB** 1/1/1990

**1. Complete Application**

[Prescreening Information](#)  
[View Application Completed on 4/4/2025](#)

Requires Funds for Completing Intake

**Respond to Request**



### Initiate a Transfer for a Customer with a status of Prescreening or Applicant

If you would like to refer a customer to a Navigator, a different provider, or a sub-grantee, select their name from the customer list and then select the Intake tab.

1. Scroll to the Customer Status section.
2. Check the box for "Transfer Customer to a different navigator/grantee."
  - a. Note: This will also display sub-navigators and sub-grantees
3. Select from the program and grantee dropdowns.
4. Enter text into the Reason for Request field.
5. Select the button Submit Transfer.
6. The system will then display a confirmation message that the transfer has been requested.

#### 4. Customer Status: Application

Transfer customer to a different navigator/grantee

**NOTE:** Submitting a new transfer request modifies the existing request.

Select a Program \*

Select a Grantee \*

Reason for Request \*

The screenshot shows a web application interface. At the top, a dark notification box says "testapps.illinoisworknet.com says Transfer requested" with an "OK" button. Below this is a section titled "Assessment" with a "Last Updated" header. A table below this header contains the text "No data available in table". There are navigation arrows and a link "View a Program Assessment Summary for steps 1, 2, and 3." Below this is a section titled "4. Customer Status: Application" with a checked checkbox "Transfer customer to a different navigator/grantee" and a "NOTE: Submitting a new transfer request modifies the existing request." There are two dropdown menus: "Select a Program" (CEJA - Climate Works) and "Select a Grantee" (Community Partnership). A text area for "Reason for Request" contains the text "This customer would like to enroll with our program." At the bottom is a "Submit Transfer" button.

Pending customer transfers populate your dashboard. If the grantee/navigator organization has not responded to the request, contact your Regional Administrator for assistance.

### Accept a Transfer for a Customer with a status of Prescreening or Applicant

When another organization initiates a transfer request for a customer with a Prescreening or Applicant status, staff who have access to the CEJA Reporting System will receive an email. The email will include the name of the organization and customer. The customer's name will be linked. Select the link and be taken to the customer's Intake tab.

Recipient list was: **scenariotester1@noemail.com; scenariotester6@noemail.com**

Richland Council has requested a customer [Davis Crockett](#) be transferred from Richland Council to Community Partnership.

Transfer Reason: This customer would like to enroll with our program.

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

Illinois workNet Team

Select the button Respond to Request:

- If you select Accept, then the customer will appear in your customer list.
- If you select Reject, then the customer will remain in the customer list of the organization that initiated the transfer request.
- If you select Close, then the transfer request will remain pending for the initiating organization.

If you have any questions about customer requests while working with other organizations, contact your Regional Administrator.