

IWDS 2.0

**IWDS 2.0 CAREER PLANNER LEARNING
SERIES**

Session 5: The Referral System

Recording Notice

The Illinois Department of Commerce and Economic Opportunity (DCEO) allows for the recording of audio, visuals, participants, and other information sent, verbalized, or utilized during business-related meetings. This meeting is scheduled to be recorded by DCEO.

- ☐ Your participation in this meeting without expressing an objection to recording will be treated as consent. Any participant who prefers to participate via audio only should disable their video camera so only their audio will be captured.

Virtual Meeting Guidelines

1

Minimize Background Sounds

Mute your phone or computer microphone when you are not speaking to keep the session clear and focused for all participants.

2

Be Present

Use the "Raise Hand" reaction to indicate you'd like to speak aloud. Wait until you're called on. Stay engaged and minimize distractions during the session.

3

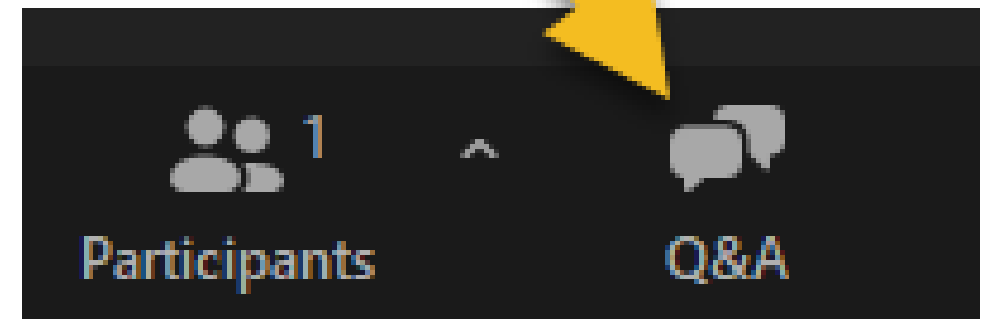
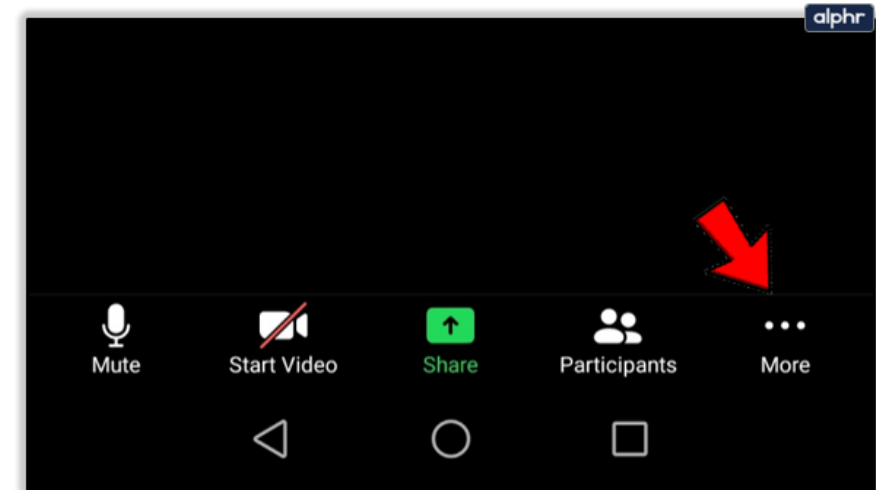
Engage Everyone

Turn on your camera if you feel comfortable doing so. Put any questions or comments in the chat so everyone can benefit from the discussion.



Please use the Q&A feature for questions!

- To locate the Q&A feature, click on the "More" icon on the toolbar the bottom of your screen
- Then select "Q&A" - this will place the Q&A feature on the toolbar for easy access.



Career Planner Learning Series

VIRTUAL

APRIL-MAY 2026

Six focused virtual sessions will walk career planners through the complete workflow — from first contact with a customer to account access in IWDS 2.0. Each session builds on the last to give you a full picture before in-person training begins.



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Reflections on Microteach 4

•Were you able to attend or watch the recording of Microteach 4?

Yes

No

What opportunity do you think IWDS 2.0 Career Plans will create for staff?

- More meaningful customer conversations
- Better coordination of services
- Stronger goal tracking
- Improved case management
- Greater consistency across teams

Learning Objectives

By the end of this microteach, participants will be able to:

1

Understand the Why

Understand why the IWDS 2.0 Referral System was created and the challenges it was designed to solve.

2

Understand How It Works

Describe how the referral process works within IWDS 2.0.

3

Differentiate Referral Types

Distinguish between the Universal and Integrated Referral Systems and know when each applies.

4

Connect to Customer Service

See how the system supports customer-centered, coordinated service delivery statewide.

Click to edit Master title style

We want to hear from you! In the chat, please share:

Your Name

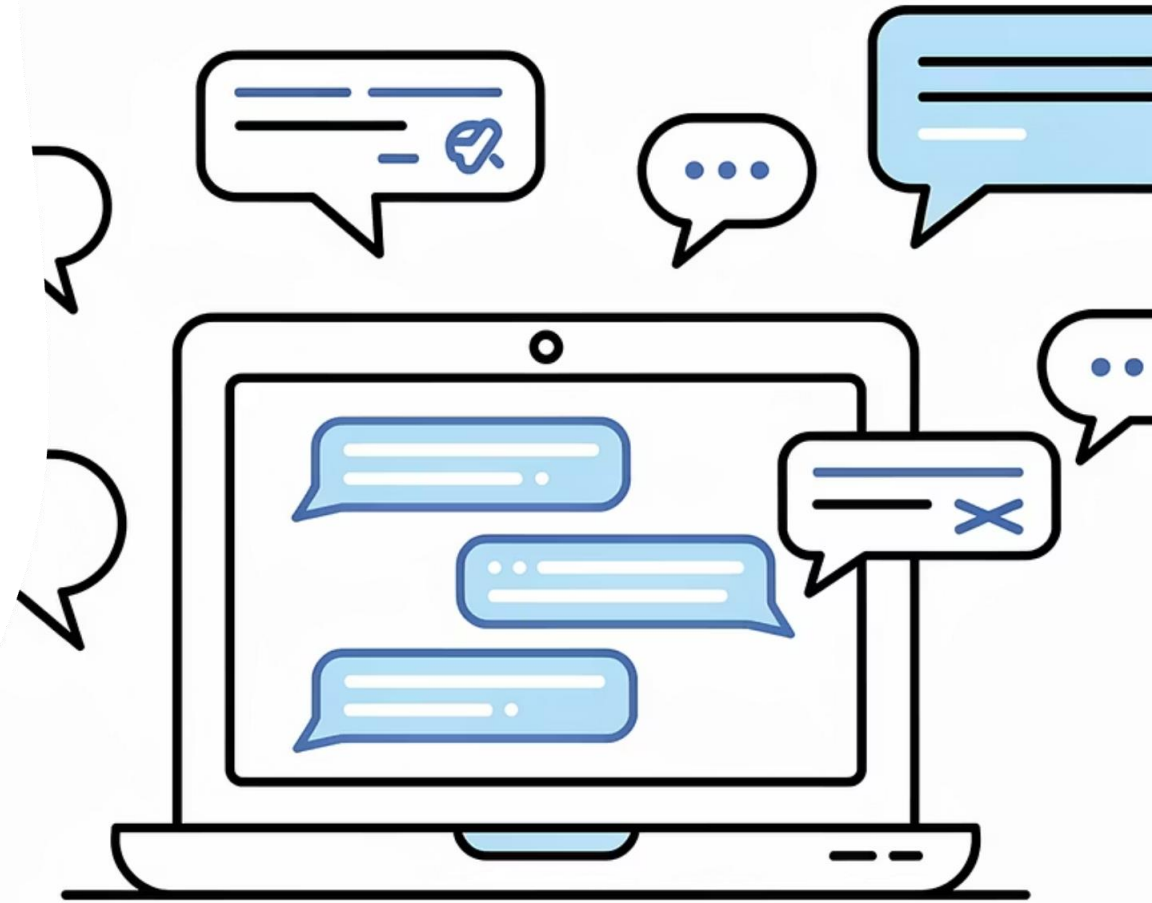
Introduce yourself so the group knows who's in the room today.

Your LWIA

Let us know which Local Workforce Innovation Area you're representing.



What is your most frequent type of referral?



The Referral System

Initial skills and needs assessment to connect customers with the right services and pathways.

BACKGROUND

Why the Referral System Was Developed

Illinois customers regularly need more than one service. They interact with workforce programs, education providers, human services, and community-based organizations. Historically, these services have been siloed — funded differently, managed by different entities, and tracked in separate systems — making coordinated support difficult to achieve.

- i The Referral System was developed to support coordinated, accountable, customer-centered service delivery across Illinois — designed to function statewide across the Illinois workNet network.



Historical Challenges

Currently partners rely on informal methods that created gaps in accountability and follow-through.

How Referrals are Tracked

- Email exchanges between staff
- Phone calls with no documentation
- Local spreadsheets that weren't shared
- Local systems

Difficult to Track

- Whether a referral was received by the partner
- Whether the customer was ever contacted
- Whether services were actually provided
- Co-enrollment status and outcomes across partners
- Statewide data

Impact on Customers

While some LWIAs developed local solutions, there was no statewide answer — and that gap directly impacted the people Illinois workforce and human services systems are designed to serve.



Repeating Information

Customers had to re-explain their situation to every new program or provider, creating frustration and eroding trust.



Missed Connections

Referrals sent through informal channels were sometimes never followed up on, leaving customers without support.



Delays in Service Access

Without clear handoffs, customers waited longer to receive the services they needed most.



Falling Through Gaps

Without a shared system, customers could disappear between programs — no one knew where they were in their service journey.

SYSTEM

Our Solution: The IWDS 2.0 Referral System

In response to the historical challenges and the critical need for seamless customer journeys, we developed the IWDS 2.0 Referral System.



Real-time Referral Tracking

Monitor the status of every referral as it progresses through the system, ensuring timely follow-up.



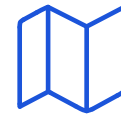
Action-Oriented Alerts

Automated notifications ensure partners are prompted when action is required, reducing delays and missed connections.



Shared Visibility

Both sending and receiving partners have a clear, unified view of the referral's journey and customer status.



Statewide Integration

Designed to function uniformly across the entire Illinois WorkNet network, fostering consistent and coordinated service delivery.

The IWDS 2.0 Referral System uses Service Finder to identify referring partners and the services they offer.

Think of Service Finder as the engine beneath the referral system. It pulls directly and continuously from Service Finder data. This means the accuracy, completeness, and currency of Service Finder records have a direct and immediate effect on how referrals function — who appears in searches, what services can be selected, and who receives notifications.



One System; Two Pathways

The IWDS 2.0 Referral System can be accessed in two distinct ways, depending on where a customer is in their service journey and who is accessing the system,.

Universal Referral System

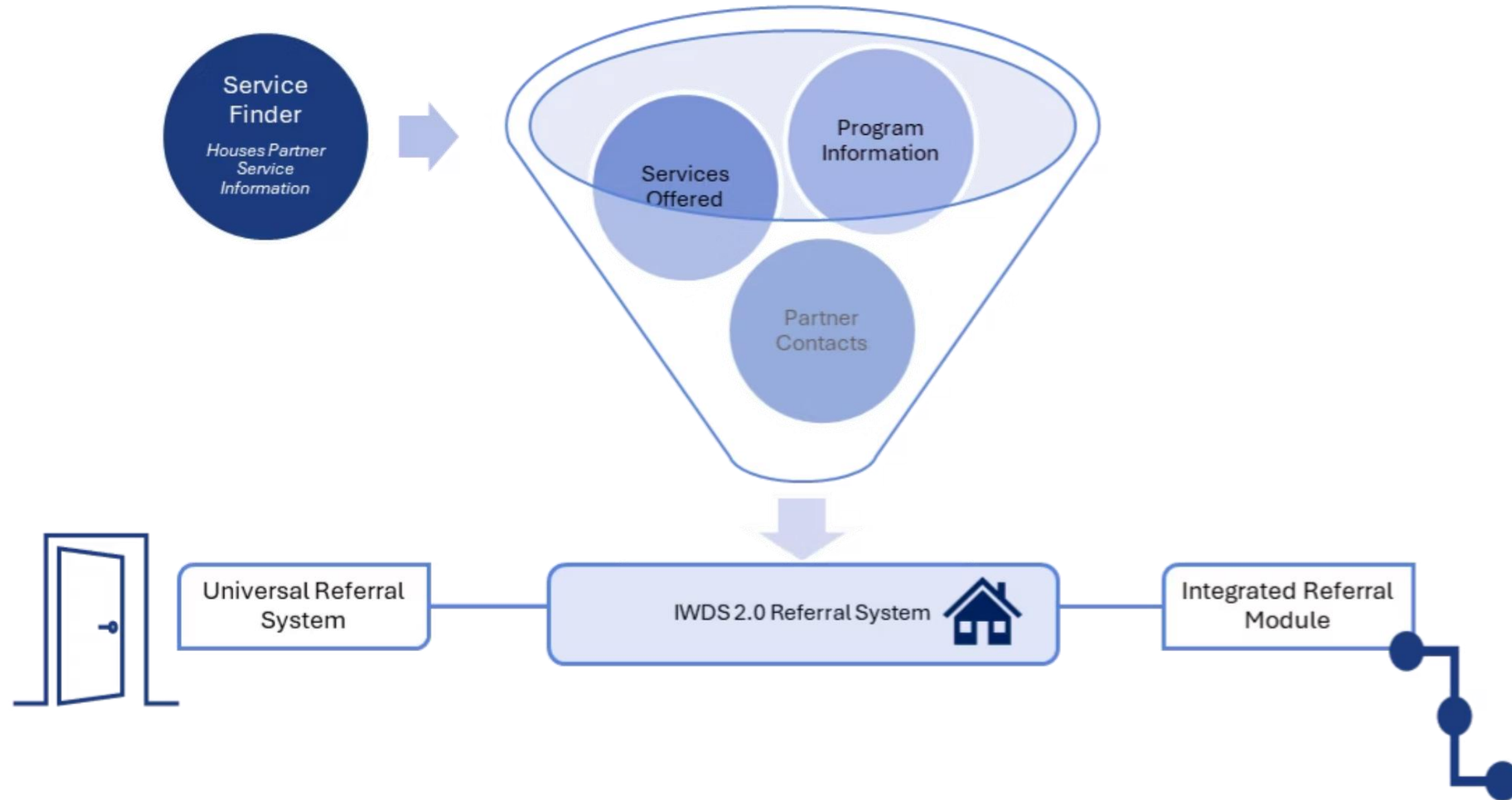
A standalone application accessible to any Illinois workNet partner. Used to make referrals for customers who have not yet started an application in IWDS 2.0 or who are served by partners outside the Title I system. No IWDS 2.0 account is required to send or receive a referral through this pathway.

Integrated Referral Module

Embedded directly within IWDS 2.0, this pathway is used by career planners working with customers who have an active application. If a customer is enrolled, referrals made here are automatically recorded on the customer's career plan, creating a seamless, unified service record without duplicate data entry.

IWDS 2.0 Referral System: How it Works

Service Finder supplies partner information, services offered, program details, and contact data – all of which feed directly the IWDS 2.0 Referral System. This system can be accessed either through the Universal Referral System or the Integrated Referral Module.



Where Referrals Fit in the IWDS 2.0 Workflow

The IWDS 2.0 Referral System offers two distinct pathways, each with specific training and access points designed to serve different user needs.

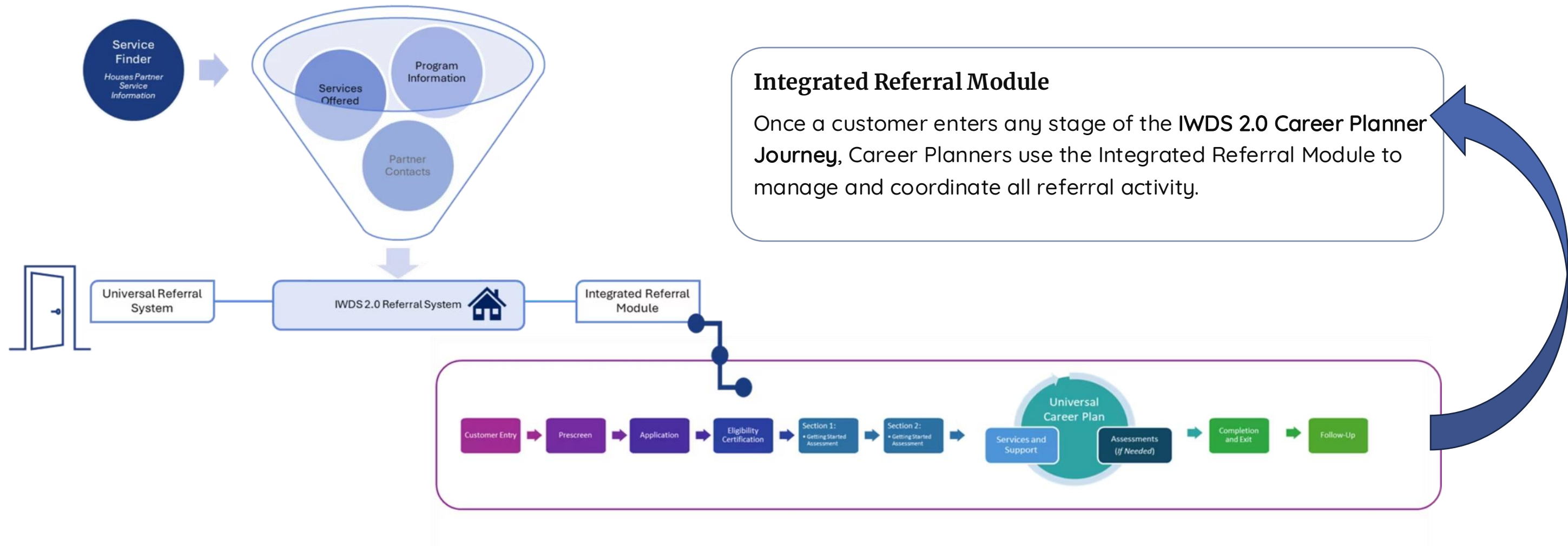
Universal Referral System

- Target Audience: All Local Partners
- Access: Standalone application
- Training: Covered in dedicated Virtual System Training
- Focus: Making referrals for non-IWDS 2.0 customers and external partners

Integrated Referral Module (★ This Training)

- Target Audience: Career Planners
- Access: Embedded within IWDS 2.0
- Training: Covered in this Microteach and in-person sessions
- Focus: Seamless integration within 2.0

IWDS 2.0 Referral System- Integrated Module



When Customers are Not Enrolled



Assess Fit

Based on the customer's goals, needs, and expectations, determine whether WIOA is the right program for them.



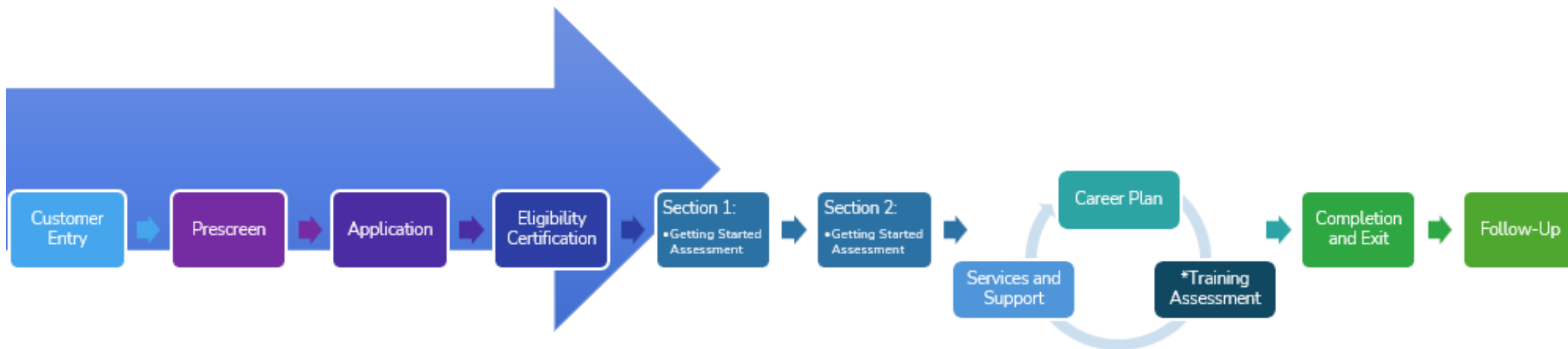
Not Enrolled?

If the customer is not enrolled, recommendations will not appear on the career plan.



Use the Integrated Referral Module

Career planners can review the customer's data on the **Customer Record** and connect them to more appropriate services using the Integrated Referral Module.



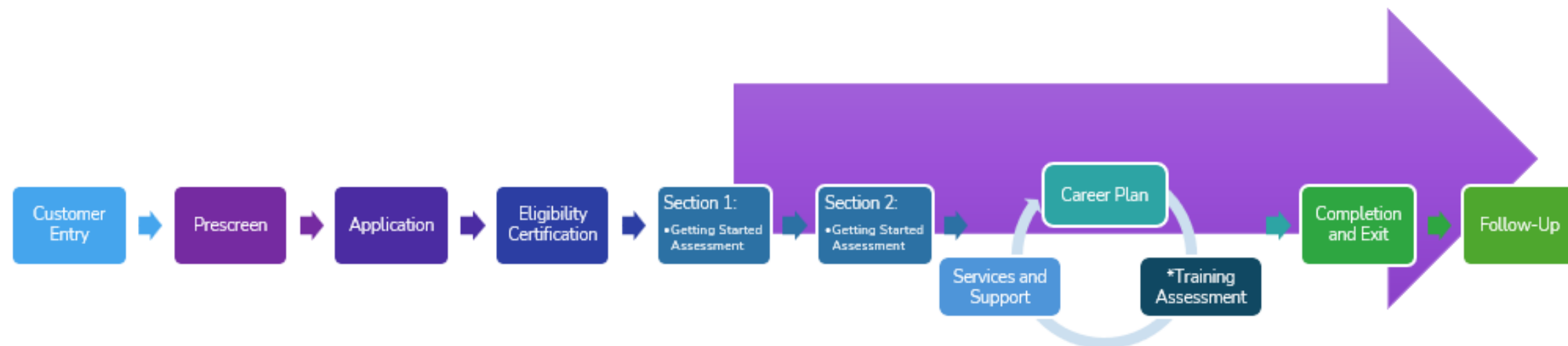
When Customers are Enrolled

System-Generated Flags

Based on the customer's responses, the system automatically identifies appropriate services and referrals, displaying them on the Recommendations tab in the Career Plan.

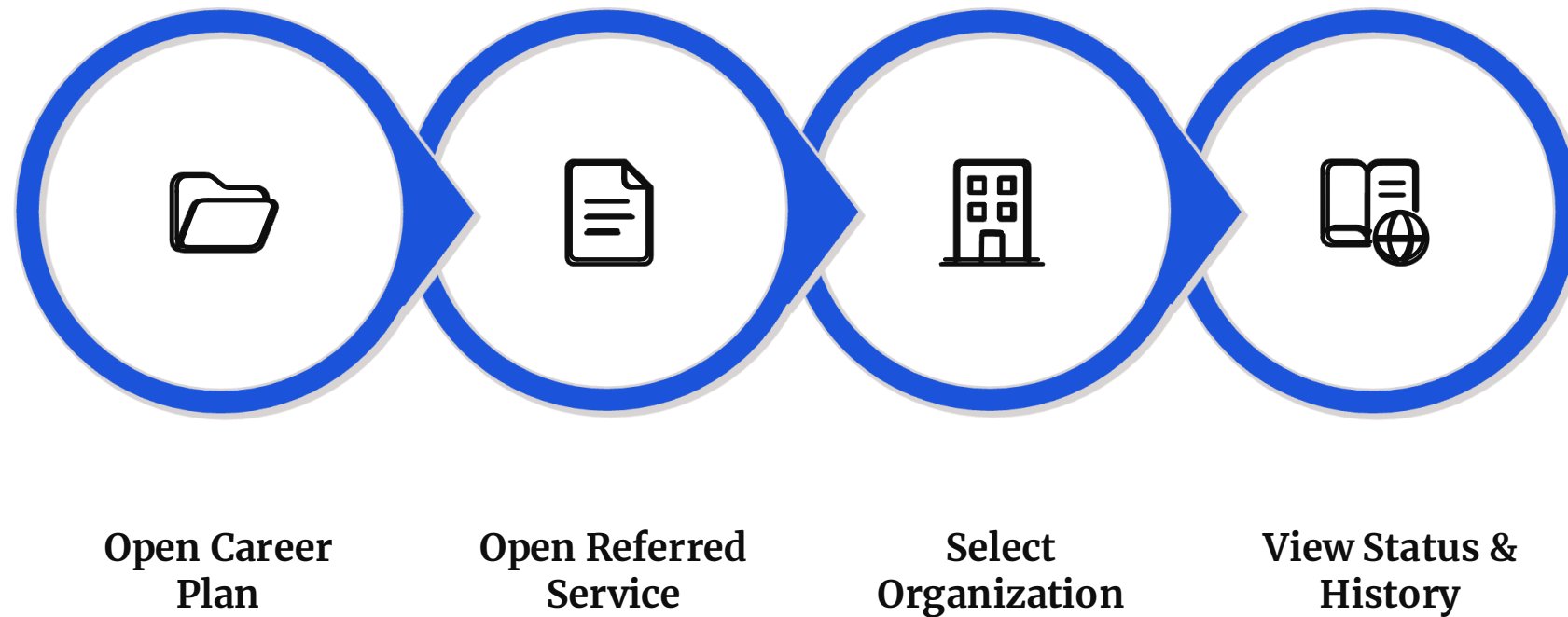
Referral Services Included

Services identified as Referral Services are included in these recommendations – mapped using the WIOA Title IB Service Matrix.



How to View Referral Status on the Customer Profile

Career planners can access live referral status directly from the customer's profile— no need to navigate to a separate module or contact the receiving partner directly.



The activity history displays every status change — giving career planners a complete, timestamped record of the referral's progress from submission through closure.

Tracking Referral Status in Real Time

IWDS 2.0 provides a clear, shared view of where every referral stands. Staff no longer need to make follow-up calls or send emails to know what happened after a referral was submitted. Each status reflects the current state of the referral in the workflow.

Draft / Not Sent

Referral is saved in IWDS 2.0 but has not yet been transmitted to the receiving partner.

Sent

Referral has been submitted and is awaiting acknowledgment from the receiving partner.

Attempting Contact

The referral has been sent, but no representative has yet marked it as received.

Received

The receiving partner has viewed the referral in the system.

Accepted

Partner has confirmed they will serve the customer and the referral is moving forward.

Declined

Partner has declined the referral; a reason is documented in the record for follow-up.

In Progress

The customer is actively receiving services from the referred organization.

Completed

Services have been fully delivered or the case has been resolved and closed.



PROCESS

Syncing Prior Referrals in Career Plans

- ❏ Referrals entered before a customer starts applying for Title I services are recorded in the standalone Referral System app — and automatically synced to the customer's IWDS 2.0 account when it is created.

This means career planners gain immediate visibility into services that were identified earlier in the customer's journey — such as referrals made during a community event or initial outreach contact. **No duplicate entry is needed.** The system connects the dots automatically, preserving continuity and saving staff time while ensuring no service history is lost.

Throughout the Journey — Not Just at One Point

- ✓ Referrals can and should happen throughout the customer journey — not just at one point. However, all referrals are recorded on the career plan in IWDS 2.0.

When to Make a Referral

- At initial intake, when an immediate need is identified
- During the Getting Started Assessment
- During career plan development
- Anytime a new barrier or service need emerges

Where It's Recorded

Regardless of when a referral is made, it is always captured on the customer's career plan in IWDS 2.0. This creates a single, unified record of all services identified and coordinated — visible to both sending and receiving partners.

What Stays Consistent — Regardless of Timing

All Referrals Are Recorded on the Career Plan

Every referral made through IWDS 2.0 Referral System — whether submitted before or after an IWDS 2.0 account is created — is captured on the customer's career plan. This ensures a complete, accessible service history for every customer.

Don't Wait to Refer

Career planners should not delay a referral until the formal plan-development phase if a need is identified earlier. The system supports real-time referral creation throughout the customer journey — act on needs when they arise, not when paperwork allows.

Policy- Federal Guidance

i The purpose of community linkage and referrals under WIOA is to:

- **Connect customers to needed resources beyond employment services:** This can include education, job training, supportive services, housing help, childcare, transportation, healthcare, or mental health services.
- **Reduce challenges to employment:** Referrals help address barriers so people can enter or stay in the workforce.
- **Coordinate services across agencies and community partners:** WIOA encourages partners to work together so services are not repeated or split up.
- **Provide holistic, customer-centered support:** Support is tailored to each customer's needs and goals instead of using one standard approach.
- **Improve outcomes for job seekers and employers:** When people get full support, they are more likely to complete training, get jobs, and keep them, which helps workers and businesses.

In short, community linkage and referrals help turn workforce services into a full support system, not just a job search or training program.

POLICY

IWDS 2.0

CAREER PLANNERS

Policy for IWDS 2.0 Career Planners

Title IB Career Planners must utilize the Integrated Referral Module, when working with a customer, to gain and maintain access to organizations in the community to make effective referrals.

The career plan serves as the primary instrument for Career Planners to document the appropriateness of service decisions, **including referrals to partner programs**, and ensures that all needs identified through required assessments are fully addressed.

Performance and Reporting Reminders

 For customers who are enrolled, Referral Services are tracked on the Career Plan and function the same as all other services.

90

Enrollment Window

Days

Enroll customers in services after certification or the application will be auto-closed.

10

Service Entry

Days

Enter all services into IWDS after delivery, with documentation and case notes.

10

Completion Update

Days

Update service status (successful or unsuccessful) after becoming aware of completion.

Co-Enrollment

- ✔ State Goal: Increase co-enrollment and reflect it accurately in the system.



Co-Enrollment Visibility

Within the IWDS 2.0 Integrated Referral Module Career Planners can see when a customer is enrolled in a partner program or another WIOA or non-WIOA program during participation.

If a Career Planners learns a customer is co-enrolled they must record it on the Co-Enrollment Across Partner Programs screen.

Key Takeaways

- **The Referral System exists to solve real problems**
Fragmented, informal referral practices left customers repeating themselves and falling through gaps. IWDS 2.0 replaces that with a coordinated, accountable system.
- **Service Finder accuracy is foundational**
Every referral depends on what is in Service Finder. Keeping partner and service records current is a shared responsibility with direct impact on customers.
- **Referrals happen throughout the journey**
Don't wait for the formal plan phase. Refer early, refer often — the system captures it all on the career plan automatically.
- **Consistent statewide use makes the system work**
The Referral System only delivers on its promise when every partner uses it — accurately and consistently — every time.



What's Next **Career Planner Learning Series**

This section provides a roadmap for the full suite of training resources being developed to support career planners through the IWDS 2.0 transition—so you know what to expect and how to prepare.

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DON'T FORGET TO REGISTER FOR MICROTEACH 6!



WHY REGISTER?

Participants who register will:

- Be added into the system
- Have access to **explore** and practice in IWDS 2.0 after the webinar
- Be able to **explore** the system and become more familiar with navigation and functionality




REMINDER

Registration is required to receive system access.
Please complete registration prior to the **webinar**.

Stay In Touch

Additional resources, updates, and announcements about IWDS 2.0 and the Career Planner Learning Series are available through the Illinois workNet page. Bookmark it to stay current as launch approaches.

-  [IWdSTransition](#) Visit Illinois workNet for the latest training schedules, policy updates, desk aides, and technical support resources related to IWDS 2.0. (more content coming soon!)



Thanks!