



Adding a Referral In IWDS 2.0 – Enrolled

IWDS 2.0 TECHNICAL TRAINING DOCUMENTS



Purpose

This document is intended to explain how to add referrals for Enrolled Customers in the IWDS 2.0 System.

Audience

This document is designed to guide both trainers and end users through the process of add referrals for Enrolled Customers in the IWDS 2.0 system.



Enrolled Customers

- Log into IWDS 2.0. ([Link](#))
- When a customer is enrolled, adding a referral is done on the Career Plan.
- Navigate to the customer’s Career Plan by selecting the Customer > Access Case Management Tools > Career Plan.
- On the Career plan, add a referral by adding a service. At the Goals Screen, Select **Add Service**.
- After adding the service, Select the **Eye Icon** next to the service.

Customer Profile: Sibia S Ab3213731

Preferred Name	Preferred Communication Method	Primary Phone Number	Email
	N/A	(555) 555-8831	sibabr09@fakemail.com

Program(s)	Application Status	Application Date	Est. Exit Date
WIOA - Dislocated Worker	ActiveParticipant	05/28/2025	N/A

What Area Do you Want to Work In?

Recommendations **Plan** Signatures

Manage Goals, Steps & Services

Key: Goals Steps Services [Legacy Services](#)

View: Select a Goal or Step:

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Refer the Service

- After selecting the **Eye Icon**, next to the service you need to Refer, Select **Edit**.
- The Edit Episode Window will open.
- Select **Refer Service**

Manage Goals, Steps & Services

Key: Goals Steps Services [Legacy Services](#)

View: All

Type	Name	Actions
Education	Get Ready for or complete an Associate Degree in A Entertainment, Sports, and Media for career stability growth.	
	Take away obstacles to participating in an education training program	
	Housing Assistance (1 episodes)	

Housing Assistance
Same Day Service

[← Back to Career Plan](#)

Program: WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D), WIOA - Youth (WIOA 1Y), WIOA - Rapid Response (WIOA 1E) Service Level: Supportive Services Grant Number: N/A

Select a Service Episode to View: Service Episode 1 of 1

Goal
Get Ready for or complete an Associate Degree in Arts, Design, Entertainment, Sports, and Media for career stability and growth.

Step

Edit Episode - Housing Assistance [1 of 1]
Same Day Service

Program: WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D), WIOA - Youth (WIOA 1Y), WIOA - Rapid Response (WIOA 1E) Service Level: Supportive Services Grant Number: N/A

Goal *
Get Ready for or complete an Associate Degree in Arts, Design, Entertainment, Sports, and Media for career stability and growth.

Step *
Take away obstacles to participating in an education or training program

This Supportive Service Is Removing Obstacles for What Other Service?
Select an answer

Providing Entity *
Select an answer

Supplier

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Refer Service – Details

- After selecting Refer Service, the Refer Service Modal will open.
- Use the Search bar to narrow the search to a service and check the box for appropriate service.
- After Selecting a Service and Additional drop down appears which lists Providers and their distance from the customer.
- After selecting the provider, Select **Save**. Utilize the red X to remove a selected service.
- After clicking Save, the referral gets sent and you go back to the service, where the name is populated in Providing Entity. There will be a link to view the referral provider.
- Clicking on the link to view the referral will show the status.
- Review the consent status with the customer and select Add or Update. The referral will not send until the verbal consent is granted.

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Helpdesk.illinoisworknet.com



www.illinoisworknet.com



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Adding a Referral from the Referral System to the Career Plan

- If a customer has a referral previously entered that needs to be on the career plan, go to Referrals from the customer profile.
- Click on the chevron below the referral you would like to add to the career plan and click **Add to Career Plan**
- Select the Goal and Step to add it to. Click the box to select and Utilize the **Edit** pen to edit service. Complete Entering the Service as needed, then click **Save**.

Referrals: Olivia Miller >

Referrals

Search Referrals

Incoming/Outgoing: Select, Referred To: Select, Services: Select, Referral Status: Select

Incoming/Outgoing	Referred To	Services	Referred From	Sent Date	Referral Status	Response Date	Last Updated
▼	Outgoing	ESTL Transportation	1	N/A	N/A	Draft/Not Sent	5/19/26

Services: Public transportation passes and vouchers. Add to Career Plan

← Back to Career Plan

Keyword Search: Enter Keyword... [Reset]

Goal: Get a full-time job like the one you had before in Production, with similar or better pay and benefits. Step: Take away obstacles to getting a job or joining a work program

Advanced Search

Filtered Services

Service Level	Service Name	Program-SubProgram	Selected	Actions
Supportive Services	Accommodations Support	WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D), WIOA - Youth (WIOA 1Y), WIOA - Rapid Response (WIOA 1E)	<input checked="" type="checkbox"/>	[Edit] [Info]
Supportive Services	Books, Fees, or Supplies for Postsecondary Education	WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D), WIOA - Youth (WIOA 1Y), WIOA - Rapid Response (WIOA 1E)	<input type="checkbox"/>	[Info]

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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.

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