



Referring a Non-Enrolled Customer

IWDS 2.0 TECHNICAL TRAINING DOCUMENTS



Purpose

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



Non-Enrolled Customers

- Log into IWDS 2.0. ([Link](#))
- For customers who are not enrolled in WIOA services, but are in IWDS 2.0, referrals can be added as well.
- In the Customer Profile, Click on **Referrals** under Participant Summary Tools

- **Note** - When a customer is enrolled, adding a referral is done on the Career Plan or from this tab there is ability to add past referred services to the Career Plan ([Guide for Enrolled Customers](#)).

- On the Referrals Tab, Select **Add Referral**

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Refer the Service

- After selecting Add Referral, use the drop-down to select the Service(s) to refer.
- After selecting the service(s), additional drop-down menus will appear for Select Provider. Select the provider from the list and click **Save**.

- **Note** – Providers are broken down into categories based on proximity to the customers zip code. Use the search bar to find a specific provider. (Some providers may not appear in the drop down if they have not opted into the Universal Referral System)

Referrals

Search Referrals

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

Search Clear

Add Referral

Incoming/Outgoing	Referred To	Services	Referred From	Sent Date	Referral Status	Response Date	Last Updated
> Outgoing	Lynette's Site	1	N/A	N/A	Draft/Not Sent	N/A	6/10/26

- After selecting Save, the referral will appear in the Referrals list on the customer profile. It will show a Referral Status of Draft/Not Sent until consent to send is recorded. Select the hyperlinked Provider Name and the Referral Details Screen will open

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Referral Details

- The Referral Details page contains referral information, referral status bar, services requested and ability to update customer consent for the referral.
- Review the consent status with the customer and select **Add or Update**. The referral will not send until the verbal consent is granted.
- After updating the consent, the referral can be sent by selecting **Edit**.
- After selecting **Edit**, choose a primary contact and add any relevant notes for the provider. Once completed, select **Save & Send**.
- **Note** – Selecting Save will save notes and information in the draft form. Selecting Delete Draft Referral will delete the referral.
- Referral Status will be updated to Sent in the referral table.

Referral Status

Draft/Not Sent Sent Received Attempting Contact In Progress Completed Closed

6/10/26

Referral Information

Provider: Lynette's Site
Address: 1900 Knoxville Ave
Peoria, IL 61603

Services Requested: Daycare centers

Consent Status: No Consent
[Add Or Update](#)

Sent Date: N/A

[Resend Referral](#) [Edit](#)

Add/Update Consent

Customer Consent

If you do not understand something or have questions, please ask.

I hereby authorize **Lynette's Site** to view Employment & Training Program information for the purpose of providing me with service coordination. Information entered into the system will be disclosed to **Lynette's Site** only as necessary in to administer the service coordination or for audit evaluation purposes.

I understand that I may revoke this consent at any time in writing, but that revoking it will not cancel what was already done before I revoked it. I understand that I have the right to inspect and copy the information that is disclosed. If not previously revoked, this consent will terminate upon the completion of the service coordination, but in no event shall exceed one year from today.

It has been explained to me that if I refuse to consent to this disclosure or I revoke my consent during the case coordination I may not receive case coordination services and my public assistance may be affected. I understand that I may, however, receive mental health services and substance abuse treatment services without agreeing to this consent.

Did the customer provide verbal consent?
Select

[Save](#) [Cancel](#)

Referral Details: Kelly Trimble

Referral Information

Provider: Lynette's Site
Address: 1900 Knoxville Ave
Peoria, IL 61603

Services Requested: Daycare centers

Consent Status: Active
[Add Or Update](#)

Sent Date: N/A

[Resend Referral](#) [Edit](#)

Referral Notes

Primary Contact: Select

Notes

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[Save & Send](#) [Save](#) [Delete Draft Referral](#)

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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. [X] [v]

Step: Take away obstacles to getting a job or joining a work program [X] [v]

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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[Helpdesk.illinoisworknet.com](https://helpdesk.illinoisworknet.com)



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