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Referral System Partner Training - Send & Respond to Referrals, Reporting Microteach 2

Audience: Local Partner Staff, One Stop Operators, LWIA Leads & Frontline Referral Staff

Recording Notice

This is a Scheduled Recording

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.

What This Means for You

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.

Training Agenda

What We'll Cover Today

01 Service Finder Review and Demo

02 Adding a Customer

03 Sending a Referral

04 Receiving Incoming Referrals

05 Reports and Partner Actions — What to Do Now and Next

Virtual Meeting Guidelines

We're excited you're here today.

We want to ensure everyone can engage and participate.

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.

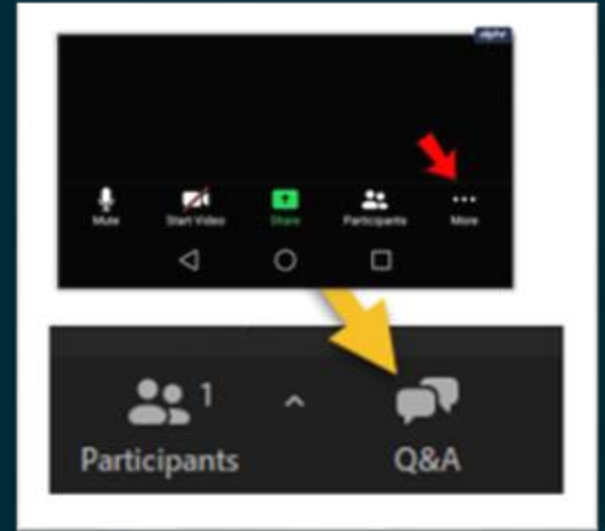
3

Stay Engaged

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

Locating the Q & A Feature

- 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.



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Introduction

Polls

Chat Storm- We Want to Hear From You

Your Name

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

What's Your Partner Agency

Let us know what Partner agency you belong to.

Where You're At

Which LWIA are you representing?

If you're not sure what LWIA your organization belongs to, share your county 😊

Why the Referral System Was Developed

Primary Goals & Key Differentiators

Key Message:

Developed to support coordinated, accountable, customer-centered service delivery across Illinois.

Primary Goals

- Create a single, statewide referral approach
- Improve coordination across programs & LWIAs
- Increase transparency and accountability
- Reduce administrative burden
- Improve the customer experience

What Makes the System Different

- Real-time referral tracking
- Shared visibility for sending & receiving referrals by partners
- Alerts for referrals requiring action
- Designed to function statewide across the Illinois workNet® network with familiar user interface
- Integrated into Career Planner Workflow

How it was Built

Integration with Multiple Entries

Key Message:

The System was built to allow for universal statewide integration for all partners.

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.

Pathway 1: 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.

Pathway 2: Integrated Referral Module

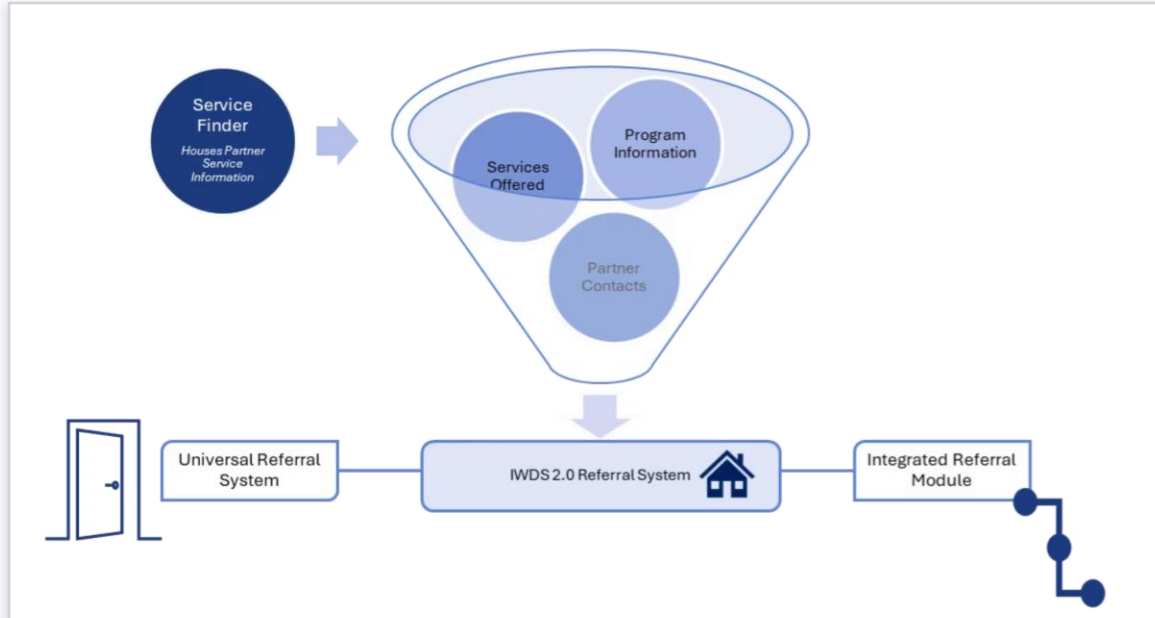
Embedded directly within IWDS 2.0, this pathway is used by career planners working with customers who have an active application. Referrals made here are automatically recorded on the customer's career plan, creating a seamless, unified service record without duplicate data entry.

How it Works

One system. Better connections. Stronger outcomes.

Key Message:

A shared, statewide tool that simplifies referrals and connects customers to the right services across partners.



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Service Finder & Universal Referral System Navigation Demo

Outgoing Referrals

Total Referrals Sent: 30

📅 Average Days to Process:

Sent to Received: 25
Sent to Progress: 0
Sent to Complete: 0
Sent to Closed: N/A

Co-Enrollment

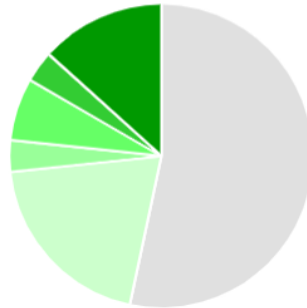
Title I: 0
Title II: 0
Title III: 0
Title IV: 0
More Than 2 Titles: 0

🚩 Response Needed

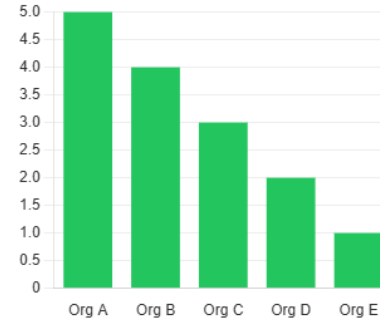
Referrals Sent Past 10 Days: 1
Attempting Contact Past 10 Days: 1
Referrals without status change in 30 days: 1
Update Requested: 0
New Referrals: 22

Referral Status Breakdown

● Not Started ● Sent ● Referral Received
● Attempting Contact ● In Progress ● Complete
● Closed



Top Referral Sources**



Statewide referral reporting dashboard or system-generated summary report showing cross-LWIA referral volume and status

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Next Steps for Training

How This Training Will Work

Local Area Preparation

Key Message:

A coordinated statewide approach to support engagement and support.

Group A

Partners within the following LWIAs:

- 1, 2, 3, 4, 5, 7, 13, 14, 20, 23, 25, 26

One Module, Two Options:

- May 8, 11AM

Optional Office Hours

- June 2, 3PM

Group B

Partners within the following LWIAs:

- 6, 10, 11, 15, 17, 18, 19, 21, 22, 24

One Module, Two Options:

- May 12, 3PM
- May 15, 11 AM

Optional Office Hours

- June 5, 11 AM

Not sure which LWIA your organization belongs to?

Please refer to the [LWIA County Reference Guide](#) or contact us for assistance.

Partner Actions: What to Do Now and Next

Immediate Steps & Upcoming Training

DO NOW

All partners (required and opt-in):

- Review & update Service Finder sites
- ✓ Contacts — verify active, correct staff
- ✓ Programs — check accepting referrals status
- ✓ Services — ensure all active services listed
- Confirm referral emails go to correct staff

DO NEXT

- Register for Referral System How-To Training Webinars
 - [Referral System Technical Assistance Webinars](#)
- Ensure staff who SEND referrals attend
- Ensure staff who RECEIVE & RESPOND attend
- Prepare internal referral follow-up processes
- Review Referral System Partner Guide

Resources: Referral System Partner Guide

Resources for Partners

Referral System Partner Guide

- Review & update Service Finder sites
 - Contacts — verify active, correct staff
 - Programs — check accepting referrals status
 - Services — ensure all active services listed
- Connect with your Local LWIA Partners
- If Needed – Attend Weekly Office Hours

REFERRAL SYSTEM GUIDE

- #### 1 Set Up Referral Site

 1. Go to the *Service Finder Administration* to update an existing site or add a new site.
 2. Search for your location. If it is not in the system, enter the site information.
 3. Enter contacts, ensuring a *Service Finder Primary Contact* and *Referral System Primary Contact* are listed.
 4. Enter Programs available at your location and indicate which programs are accepting referrals.
 5. Identify the Services offered by your location. The Referral System will use these services to connect customers to your location.
 6. Preview and submit the site.
 7. If you do not have a partner account, submit a request for a partner account.

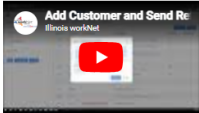
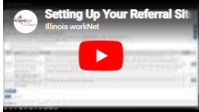
Instructions:

 - [Referral Guide - Part 1: Add Site and Contacts in Service Finder](#)
- #### 2 Add Customers and Send Referrals

 1. Log in to the *Referral System* and select *Add Customer*, then enter the required fields.
 2. The system will check whether an account exists. If no account is found, an Illinois workNet account will be created.
 3. Add the referral.
 4. Select referral services that are needed.
 5. Select the provider for each service needed. If a provider is not available, remove the referral service.
 6. Once selections are saved, a draft referral will be created for each provider. A tab will be created for each provider.
 7. Complete each referral by completing the customer consent, selecting a contact for the referring partner, entering notes as needed, and submitting the referral. Complete this information for each tab.

Instructions:

 - [Referral Guide - Part 2: Add Customers and Referrals](#)



Link: <https://www.illinoisworknet.com/referralsystempartnerguide>

Questions?

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Closing Poll

Please share your thoughts so we can continue tailoring these meetings to meet your needs.

Key Takeaway

The Referral System is only as effective as:

**Accuracy of
Service Finder Data**

**Consistency
of Partner Use**

**Shared Commitment
to Customer-Centered Service**

Maintaining Service Finder information is not an administrative task — it directly impacts customers, partners, and statewide outcomes.

Next: Referral System How-To Training — Sending, Receiving & Tracking Referrals

Resources

IWDS 2.0 Training Hub:

<https://www.illinoisworknet.com/referralmaterials>

Referral System Partner Guide:

<https://www.illinoisworknet.com/referralmaterials>

Office Hours:

Weekly Office Hours –
Tuesday's at 2pm
Email Kelly Trimble for One-on-One Support

Next: Referral System How-To Training — Sending, Receiving & Tracking Referrals