

Illinois workNet®

Universal Referral System & It's Service Finder Foundation

Microteach 1

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

Training Purpose

- Why the Referral System exists
- Partners are encouraged to opt-in
- How it supports customer-centered service delivery
- Why accurate Service Finder data is critical

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 Background, Purpose & Use Expectations

02 How Service Finder Powers the Referral System

03 Statewide Consistency, Transparency & Shared Responsibility

04 Critical Service Finder Components Partners Must Maintain

05 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.

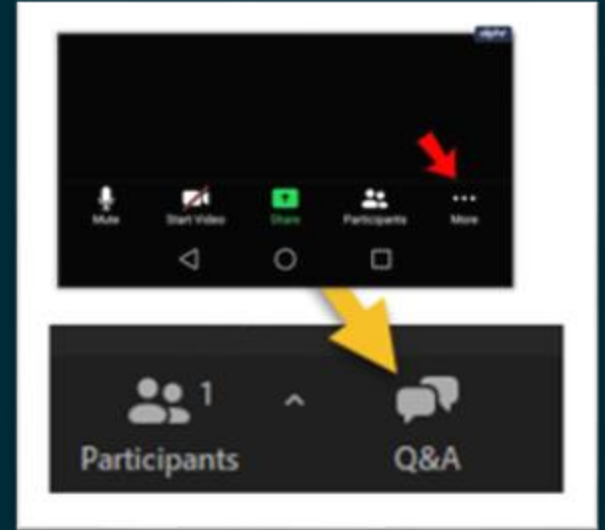
3

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.



Chat Storm- We Want to Hear From You

Your Name

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

What Do You Do?

What's your organization? What types of services or programs do you provide?

Where You're At

- Let us know which LWIA you're representing

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

Why the Referral System was Developed

Background, Goals, and Purpose

The Referral System was intentionally designed to serve a purpose.

Purpose

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

The Challenge the System Was Designed to Address

Background & Purpose

Key Message:

Illinois customers often require services from multiple programs, but referrals to services have historically been fragmented.

Customers Interact With:

- Workforce programs
- Education & training providers
- Human service agencies
- Community-based organizations

Historical Challenges:

- Referrals via email, phone, spreadsheets
- No way to confirm receipt
- No tracking of follow-through
- Limited co-enrollment visibility
- Generating impactful reports

Impact on Customers:

- Repeating info multiple times
- Delays in accessing services
- Missed or dropped referrals
- Falling through gaps between programs

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 the Referral System Was Developed

Stakeholder Engagement and Pilot Process

Key Message:

The Referral System was developed with feedback from Stakeholders from across the State and Partner Programs.

Pilot Process

- User Acceptance Testing – September 2025
- Piloted Participation in System on a small scale with partners in their Local Areas – January 2026
- Ongoing Feedback Has Directly Impacted System Enhancements

Stakeholders

- LWIA Stakeholders across Titles
- One Stop Operators
- Community Based Organizations

What Powers It

Service Finder is the Engine

Key Message:

Whatever appears in Service Finder, will be reflected in the Referral System.

The Engine

The Referral System does not operate independently.

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

What does that mean?

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.

How Service Finder Powers the Referral System

System of Record & Critical Data Connection

Service Finder Is the System of Record For:

- Organizations
- Locations
- Contacts
- Programs
- Services



Referral System Relies on Service Finder To:

- Show which organizations appear in searches
- Determine which services can be selected
- Identify programs accepting referrals
- Route referral email notifications
- Track co-enrollment & reporting

Consequences of Inaccurate Service Finder Data:

- Referrals sent to wrong staff
- Emails to inactive employees
- Organizations missing from search results
- Programs without capacity receive referrals
- Incomplete co-enrollment reporting

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

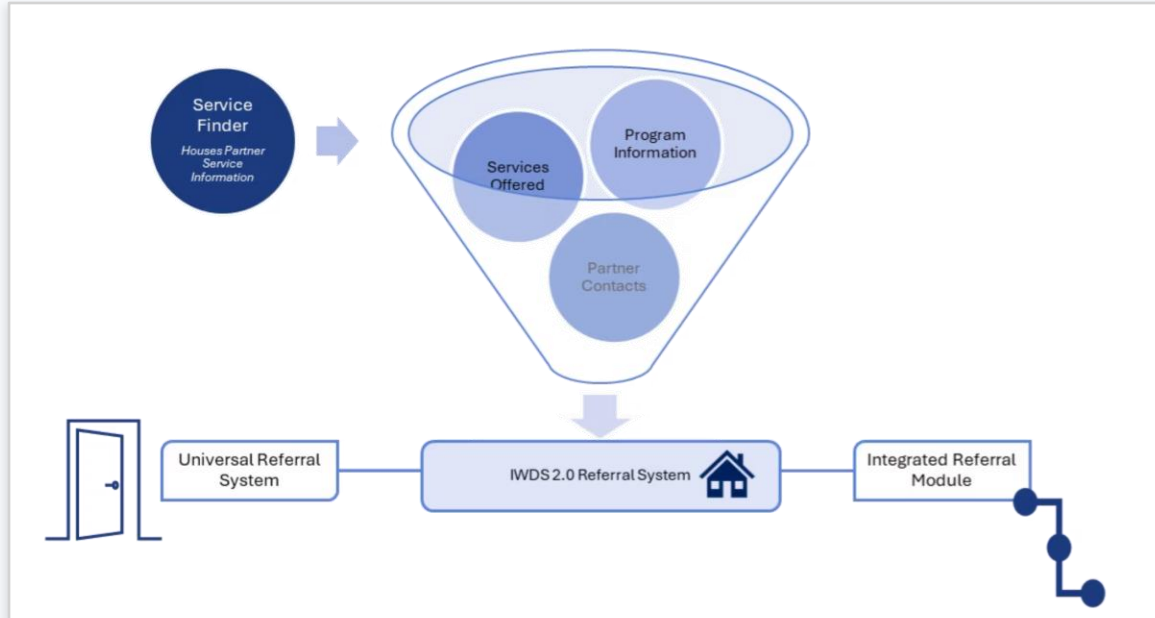
Embedded directly within IWDS 2.0, this pathway is used by career planners working with customers who have an active application. Referrals made here are automatically recorded on the customer's career plan, creating a seamless, unified service record without duplicate data entry.

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.



What it Does

One system. Better connections. Stronger outcomes.

Key Message:

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

What Does It Do?

- Tracks referral activity
- Sends referrals (individual and bulk) and coordinates with other programs in seconds
- Reduces intake and paperwork
- Improved coordination between partners

How to Access?

- Secure access with customer consent
- Available as a standalone partner tool or integrated [Referral System](#)
- Integrated into IWDS 2.0 for Title I adult, dislocated worker, and youth programs

Partner Access

Participation Requirements

Not all partners are required to use the Referral System, but broad participation strengthens outcomes statewide.

REQUIRED

Title I programs are required to use the Illinois workNet® Referral System.

Partners may Opt-In to the Universal Referral System, with support from Title I. This helps local areas expand referrals, improve coordination, and increase visibility of services across the state.

Voluntary OPT-IN

- Title II
- Title III
- Title IV
- WIOA Partners
- Community-Based Organizations
- Service Finder Partners (CEJA/JTED, etc.)

Why opt-in matters: Expands referral options • Strengthens cross-program coordination • Improves statewide visibility of services

What 'Opt-In' Means in Practice

Access & Shared Responsibility

Opting in provides real system access and shared responsibility.

1. System Access

Organization has access to the Referral System with Illinois workNet account and can view, manage, and update referral statuses.

2. Referral Notifications

Designated contacts receive email notifications when a referral is sent to their program. These statuses can be updated without logging in

3. Referrals Appear in System

All incoming referrals are visible and tracked — not lost in personal email or spreadsheets.

4. Action Expected

Staff are expected to act on and update referral statuses in a timely manner.

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Universal Referral System Preview



Search Referrals

Customer Name

Referred To Provider

Select

Referred To Program

Select

Referral Status

Select

Search

Advanced Search

Reset Filters

Notifications

Incoming

Outgoing

All Referrals

Incoming Notifications

Response Needed

Referrals Received Past 10 Days: 0

Attempting Contact Past 10 Days: 0

Referrals without status change in 30 days: 0

Update Requested:

New Referrals:

Outgoing Notifications

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: 23

Referral System Notification Dashboard – Linking to Customers Needing Action

Subject: Referral Notice

Hello Natasha Miller,

Community Center has referred Kelly Connor to your organization. The following services have been requested:

- Daycare centers

Illinois workNet partners use this tool to safely send customer referrals to local providers. The above customer could possibly benefit from your services. Please submit your referral response within 5 business days. Your response will be saved directly into the case management system with the customer's program information.

Use the link below to respond to the referral:

<https://testapps.illinoisworknet.com/ReferralSystem/referrals/respond?token=97c26cf0ac5746dc8347a7f7fccc1913>

Referral notification email received by an opt-in partner showing a newly assigned referral with partner name and service type

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

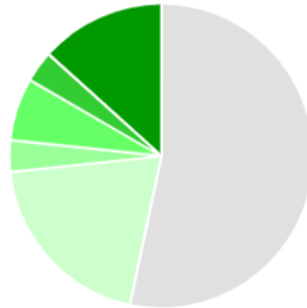
Title I: 0
Title II: 0
Title III: 0
Title IV: 0
More Than 2 Titles: 0

🚩 Response Needed

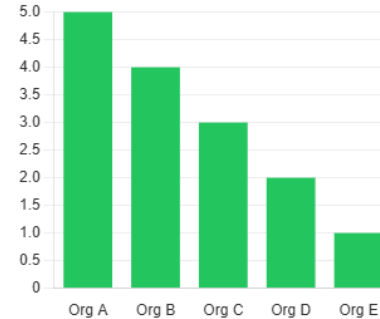
Referrals Sent Past 10 Days: 1
Attempting Contact Past 10 Days: 1
Referrals without status change in 30 days: 1
Update Requested: 0
New Referrals: 22

Referral Status Breakdown

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

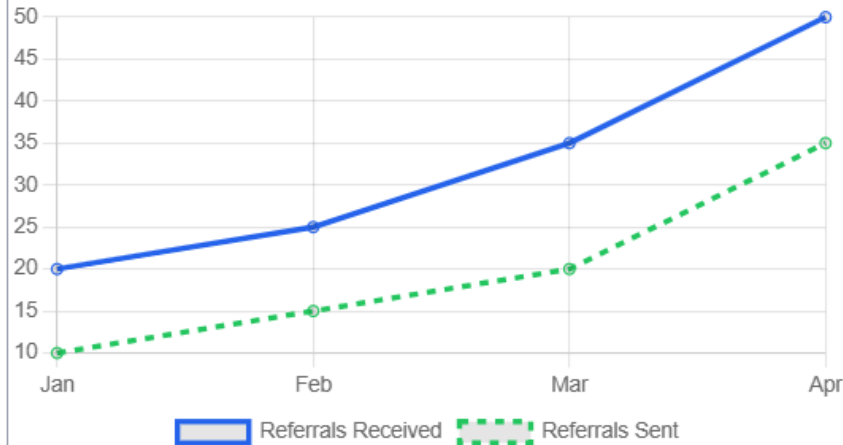


Top Referral Sources**

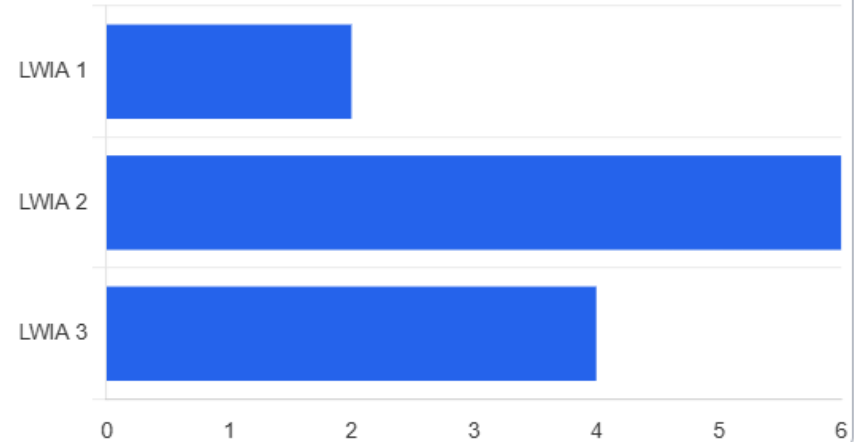


Statewide referral reporting dashboard or system-generated summary report showing cross-LWIA referral volume and status

Referral Volume Over Time **



Referral Destinations **



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

What Referring Programs Can See

Transparency & Follow-Through

After making a referral, referring partners can view status updates and confirm action has been taken.

1

View Referral Status Updates

Live status updates are visible as the receiving program acts on the referral.

2

Confirm Receipt

See whether the referral was received and acknowledged by the receiving organization.

3

Confirm Action Taken

Verify action has been taken so staff can follow up with the customer appropriately.

Important Clarification

The system provides status visibility, not full case records.

Transparency supports accountability without replacing program-specific systems.

My Sites Customers Workshop Leads Reports Welcome, Amelia!

Referral 1 Referral 2 Referral 3 Referral 4

Referral Status

Request Update Respond For Provider

Draft/Not Sent 9/23/25 Sent 4/29/26 Received Attempting Contact 4/29/26 In Progress Completed Closed

Referral Information

Resend Referral Edit

Consent Status: Active ✓
Add Or Update

Provider: Carter Foundation
Address: 81 Public Square
Springfield, IL 61462

Services Requested:

- Financial and credit counseling
- English as a Second Language (ESL) programs

Sent Date: 4/29/26

Referral Notes

Primary Contact* Kelly Trimble

Notes

Normal Sans Serif B I U A [Icons]

Referral detail view showing the status progression (Sent → Received → In Progress → Closed)

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Service Finder Updates Preview

Critical Service Finder Components Partners Must Maintain

★ *Priority Fields That Directly Impact Referral Success*

★ **Contacts (Most Critical)**

- At least 1 Referral System Primary Contact per location
- Email addresses must be current & monitored
- Staff must be active & responsible for referrals
- Common issue: retired staff still listed; wrong staff receiving referrals

★ **Programs (Critical)**

- Program marked active
- Accepting referrals status accurate
- Correct counties selected
- Correct program type identified

★ **Services**

- All active services selected
- Outdated services removed
- Key Reminder: If a service is not selected, the org will NOT appear in referral searches — even if the service is provided

Return to My Sites

Referral Information | WIOA Information | Physical Location Information | **Contacts** | Social Media | **Programs** | Organization Type & Funding | **Audience and Services** | Preview | Timeline

LWIA: 20
ID: 5726
A Test Site
2450 Foundation Drive
Suite 100
Springfield IL 62703-5464

Created: 06/06/2019 14:51:51
Last Updated: 03/19/2026 15:31:35

Physical Location Information

LWIA*:
Unlock LWIA

Tell us why you're making these updates*:

Are you updating an address? Changing contact or service information? Are you making the site inactive?

Is this site active?* Yes No

Service Finder site editor — Contacts tab, Programs tab, and Services

Why Statewide and Consistent Use Matters

Statewide Consistency, Transparency & Shared Responsibility

A referral system only works when partners use it consistently and accurately.

✓ Benefits of Consistent Statewide Use

- Customers receive a consistent experience regardless of location
- Referrals are not dependent on personal relationships
- Partners collaborate across LWIA boundaries
- Statewide reporting is accurate and meaningful

✗ Without Consistent Use

- Data becomes incomplete
- Referrals appear unresponsive
- Reporting is unreliable
- Trust in the system erodes

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Next Steps for Training

What Work Has Already Started

Local Area Preparation

WIOA Title I- Director Preparation

LWIA Directors began their work in March, understanding their responsibility to:

1. Maintain Service Finder accuracy within their LWIA
2. LWIB responsible for Service Finder information remaining up to date

Their Homework

Local Areas began work to ensure the following data was up-top-date and accurate within their LWIA:

- Contacts
 - Confirming Contacts current for each Referral Partner Organization
 - Flag appropriate people as “Referral Contacts”
- Program Information
 - Ensure program details are complete and accurate
- Services Offered
 - Review & update for accuracy

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 5, . 3PM
- 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

Referrals in IWDS 2.0

Where Referrals Fit in the Workflow

Key Message:

Referrals are embedded in the career planning process for Adult/Dislocated Workers and Youth — they do not happen in isolation.

The Customer Journey in IWDS 2.0

- Customer entered in IWDS 2.0; application started
- Classification decision made: Adult/Dislocated Worker or Youth
- Getting Started Assessment completed
- Career plan developed collaboratively between customer and career planner

Transition Note

Referrals entered **before** a customer starts applying for Title I services are recorded in the standalone Referral System app and sync automatically to the IWDS 2.0 account when created — no duplicate entry needed.

Referrals in IWDS 2.0

When Referrals Happen — Throughout the Journey, Recorded on the Career Plan

Key Message:

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

Referrals Can Happen at Any Stage

- At intake (e.g., housing support identified)
- Mid-enrollment (e.g., transportation assistance)
- At exit (e.g., follow-up services)
- *Do not wait for the formal plan-development phase if a need is identified earlier*

What Is Always Consistent

- All referrals made through the Illinois workNet® Referral System are recorded on the customer's career plan in IWDS 2.0
- Career planners should not wait until the formal plan-development phase to make a referral if a need is identified earlier

[← Back to Customer Profile](#)Referrals: Lynette Tritz ▶

Participant Summary Tools

[Case Notes](#)[Self Services & Information
Only Services](#)[Referrals](#)[Assessments](#)[In Program Updates](#)[Uploads](#)[Resumes & Work History](#)[Logs](#)

Referrals

Search Referrals

Incoming/Outgoing

 ▼

Referred To

 ▼

Services

 ▼

Referral Status

 ▼

	Incoming/Outgoing	Referred To	Services	Referred From	Sent Date	Referral Status	Response Date	Last Updated
>	Outgoing	Lynette's site	1	N/A	N/A	Closed	4/29/26	4/29/26
>	Outgoing	Lynette's site	1	N/A	4/29/26	Sent	N/A	4/29/26
>	Outgoing	Lynette's site	1	N/A	N/A	Draft/Not Sent	N/A	4/30/26

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IWDS 2.0 referral entry screen showing a customer career plan with an active referral and sync confirmation message

Questions?

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