



Adding Customers and Referrals

REFERRAL SYSTEM TECHNICAL TRAINING DOCUMENTS



Purpose

The purpose of this guide is to validate the new functionality that allows users to add customers to the Referral System, create single or multiple referrals for those customers, and send referrals to the appropriate referral organization.



Audience

This guide is intended for partners, program staff and organizations to add customers and add referrals for customers in the Referral System.



Add a Customer to the Referral System

- Log into the referral system: [[LINK](#)]
- Select "Add Customer."
- The system will open a modal to add a new customer.
- Enter the required information:
 - First Name
 - Last Name
 - Date of Birth
 - Email
 - Veteran Status
 - Zip Code
 - Organization

The screenshot shows the 'Add Customer' modal on the left and a table of existing customers on the right. The modal includes fields for Customer Name, Referred To Provider, Referred To Program, and Referral Status, along with Search and Advanced Search buttons. The table lists customers with columns for Last Name, First Name, Referred From, and Referral Count.

Last Name	First Name	Referred From	Referral Count
Apple	Adams	Test Org 1	16
Rubies	Luc	Test Org 1	10
Test	Test	Test Org 1	1
Drew	Kancy	Test Org 3	3
Smith	Susan	Test Org 1	4
Palmet	Sandra	Test Org 1	4
Fall	Tanner	Test Org 1	2

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- Select “Add Customer.”
- **Note:** After Adding a customer, an option to go directly to adding a referral will appear.

Add Customer

First Name* Last Name*

First Name is required

Date of Birth* Email*

Veteran Status* ZIP Code*

Optional Information

Phone Address 1

Address 2 City

Referring Organization & Program Information

Organization* Customer is enrolled in the following program(s)



Add a Referral or Multiple Referrals to a Customer

- Select the customer from the “Customer List.”

Customers Reports Welcome!

Last Name	First Name	Referred From	Referral Count
Apple	Adam	Test Org 1	16
Drew	Nancy	Test Org 3	3
Smith	Susan	Test Org 1	4
Palmet	Sandra	Test Org 1	4
Fall	Tanner	Test Org 1	2
Martin	Steve	Test Org 1	0

- **Note** – After selecting the customer, there is a view of customer details on the left panel.

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- Select "Add Referral."
- A page will display with a drop-down menu to "Select Referral Services."
- Select the referrals needed.
 - **Note:** Number of Available providers are shown for each Referral Service
- Select the appropriate organization from each drop-down option.
 - **Note:** Providers are listed in order of distance from the customer's address
- To remove a service, select the "Remove" button.
- Click "Save."

Referrals

Search Referrals

Incoming/Outgoing: Select

Referred To: Select

Services: Select

Referral Status: Select

Add Referral

Incoming/Outgoing	Referred To	Services	Referred From	Sent Date	Status	Response Date	Last Updated
Outgoing	UAT AIC South	2	Tester City	12/9/25	Completed	12/18/25	12/18/25
Outgoing	UAT DRS - South	2	Tester City	12/9/25	Completed	12/18/25	12/18/25
Outgoing	UAT Community College - North	2	Tester City	12/9/25	Attempting Contact	12/18/25	12/18/25
Outgoing	UAT IDES South	2	Tester City	12/9/25	Completed	12/18/25	12/18/25
Outgoing	UAT Community College - South	1	Tester City	1/9/26	Completed	1/9/26	1/9/26

Add Referral

Referral Information

Provider: Tester City
Program(s): N/A
Address: 123 Chicago, IL 60612

Select Referral Services*

Select

☐ Basic Needs Assistance

☐ Clothing banks and thrift stores (4 providers)

☐ Food pantries and meal programs (1 providers)

☐ Household goods and furniture assistance (1 providers)

☐ Hygiene product distribution (4 providers)

☐ WIC and SNAP enrollment assistance (1 providers)

☐ Childcare & Family Services

☐ After-school programs (3 providers)

Select Referral Services*

Clothing banks and thrift stores (4 providers)

Select the referral provider for the services.

Clothing banks and thrift stores*

Select

Save **Cancel**

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Updating and Sending Referral to Contact

- After adding referral services and organizations, the user will be directed to the Referral Information Page. A referral Status Progress bar is shown at the top of the page.
- Select "Add or Update" under "Consent Status."
- Indicate Referral Consent.
 - **Note** – If updating consent, the user can "Renew Consent or Revoke Consent."
- Select "Save."
- Select "Primary Contact" from the drop-down menu.
- Select "Save."
- **Note** – If there are multiple referral tabs for the customer, follow the steps for "Referral Consent and Primary Contact" for each tab.
- After adding Referral Consent and Primary Contact, the "Send & Save" button will turn blue. Once blue, select "Send & Save." (This will generate an email to the primary contact at the referral organization)
- After a referral has been Sent, the user can use the "Respond for Provider" Button to update it on the providers behalf. Update Status, provide Notes and "Save"

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Viewing Customer Referral History

- At the bottom of the “Customer Referral Information” page, a customer’s referral history can be viewed.

Referral Consent History

Referred To	Start Date	Status	Expiration Date
Test Org 2	9/16/25	Active	9/16/26

<< < 1 > >> 10 ▾

Referral History

Action T1	Status T1	Notes T1	Created On T1	Created By T1
Created	Not Started	Referral Created	9/16/25	System
Updated	Not Started	Referral Consent Added	9/16/25	System
Updated	Not Started	Primary Contact updated to Contact 1	9/16/25	System
Sent	Referral Received	Referral sent to Contact 1	9/16/25	System

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- Note – At any point in time, additional referrals can be added to an existing customer by clicking on the customer’s name from the “Customer’s List.” From there, the status of all referrals can be seen, as well as adding any additional referrals with the “Add Referral” button.

Steve Martin							
Referrals							
Referred To	Services	Referred From	Sent Date	Status	Response Date	Last Updated	
Test Org 1	1	Test Org 1	9/16/25	Referral Received	N/A	9/16/25	
Test Org 2	1	Test Org 1	9/16/25	Referral Received	N/A	9/16/25	
<< < 1 > >> 10							

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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