



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 Referral System's customer management interface. On the left, a modal window titled 'Add Customer' is open, containing fields for 'Customer Name', 'Referred To Provider' (a dropdown menu), 'Referred To Program' (a dropdown menu), and 'Referral Status' (a dropdown menu). Below these are 'Search' and 'Advanced Search' buttons. On the right, a table lists existing customers with columns for 'Last Name', 'First Name', 'Referred From', and 'Referral Count'. The table includes 10 rows of sample data. At the top right of the interface, there is a red arrow pointing to a 'Add Customer' button.

Last Name	First Name	Referred From	Referral Count
Apple	Adam	Test Org 1	16
Robins	Luc	Test Org 1	10
Test	Tom	Test Org 1	1
Drew	Nancy	Test Org 3	3
Smith	Susan	Test Org 1	4
Palmer	Sandra	Test Org 1	4
Fall	Tanner	Test Org 1	2

Referral System Link





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



Add a Referral or Multiple Referrals to a Customer

- Select the customer from the "Customer List."

- **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.”

Incoming/Outgoing	Referred To	Services	Referred From	Sent Date	Status	Response Date	Last Updated
Outgoing	UAT AIC South	2①	Tester City	12/9/25	Completed	12/18/25	12/18/25
Outgoing	UAT DRS - South	2①	Tester City	12/9/25	Completed	12/18/25	12/18/25
Outgoing	UAT Community College - North	2①	Tester City	12/9/25	Attempting Contact	12/18/25	12/18/25
Outgoing	UAT IDES South	2①	Tester City	12/9/25	Completed	12/18/25	12/18/25
Outgoing	UAT Community College - South	1①	Tester City	1/9/26	Completed	1/9/26	1/9/26

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

Select Referral Services*

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

Remove

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”

Referral 1 Referral 2

Referral Status

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

1/19/26

Referral Information

Provider: Lynette's site
Address: 123 address road suite 234 Peoria, IL 61614

Services Requested: Clothing banks and thrift stores

Consent Status: No Consent Add Or Update

Referral Notes

Primary Contact: Select

Notes

Normal Sans Serif B I U A

Referral Notes

Primary Contact: Select

Notes

Contact 1 Contact 2 Contact 3

Welcome, Amelia!

Update Referral status

Referral Status: Sent

Draft/Not Sent Sent Received Attempting Contact

Notes

Normal Sans Serif B I U A

Provider: Lynette's site

Services Requested:

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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	Status	Notes	Created On	Created By
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
<< < < 1 > >> 10 <				

- 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							
workNet ID:	56956						
Username:	SMartin2						
Phone:							
Email:	steve@fakemail.com						
Veteran Status:	No						
Account Created:	9/16/25						
Reset Password							
Send Message							
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 <							
Add Referral							

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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