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DEPARTMENT OF WORKFORCE INVESTMENT

Operational Procedure For

Interagency Referral

Policy: The Worknet Leadership Team, to include the Department of Workforce Investment, has adopted a procedure for Interagency Referrals as required by the Workforce Investment Act and subsequent Memorandums of Understanding with each partner and the Workforce Investment Board. The process will be used to refer customers to Worknet Partner Agencies. The purpose for the interagency referral form is to utilize a consistent system for making referrals for case managed customers and to get feedback on the results of the referral.

On-Line Referral Form

Instructions for tracking referrals:

1. Referrals would be made for potential or case managed customers, to determine how to best serve the customer.
2. Maintain separate files for outgoing referrals and incoming referrals.
3. Match the reply to a referral with the corresponding copy in the outgoing referral file.

Instructions for the individual making the referral:

1. Contact the person to whom the customer is being referred. *(If unknown, call the agency and ask for the name and telephone number of the most appropriate person to whom the customer could be referred.)*
2. If unable to talk to the person, leave a message so that he/she knows the referral was made.

Instructions for using the on-line referral form:

1. Complete the on-line form.
2. Please be specific when stating the purpose of the referral. Examples:
   - Interested in Adult School Computers & Technology I/II or Office technology upgrade module.
   - Would like to attend Worknet Orientation
   - Please schedule for Career Exploration, PESCO Assessments, Job Skills Clerical/Industrial or Resume Prep Class.
3. Make a copy of the completed form and place it in the outgoing referral file.
4. Tell the customer to give the original copy of the form to the person at the agency to which he/she is referred.
5. When the reply comes back, match it with the corresponding copy in the outgoing referral file.

Instructions for the receiving agency:

1. Reply, on the referral form, within five working days, to the agency/person who made the referral.
2. Indicate when the referral was received and what action was taken on behalf of the customer.
3. Make a copy of the referral with the response, for the agency's incoming referral file.
4. The reply may be faxed, mailed or hand-delivered.

Responsible Official: Assistant Director

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