

Eastern Area Workforce Development Board  
Workforce Innovation and Opportunity Act  
Policy 7-18 Referral Processes

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## REFERENCES:

Workforce Innovation and Opportunity Act (WIOA), July 22, 2014: TEGL 4-15, TEGL 16-16, §108, §122, §134, §181 and §194; 2 CFR §200, et al, 20 CFR §80.760, §680.830 and §680.840.

### 1. PURPOSE:

To provide clarification for the Eastern Area Workforce Development Board (EAWDB) WIOA subrecipients regarding partner referral processes as implemented through the workforce delivery system and its partners.

### 2. BACKGROUND:

The vision of the WIOA Partnerships in American Job Centers (TEGL 4-15) is to:

- Connect all customers to a wide range of services available in their respective communities;
- Provide a seamless, customer-focused, integrated service delivery across all programs; and
- Enhance access to partner programs and the services they provide.

It further requires that a process for issuing and tracking of referrals. The EAWDB wants to ensure that businesses and job-seekers have access to information and services that lead to positive employment outcomes.

### 3. ACTION

Sound skills and practices are necessary for an effective referral. It is the vision of the EAWDB that individuals receiving services, particularly those with significant barriers to employment, would receive the broadest array of services possible to help them succeed and to increase positive performance outcomes for partners providing services. Staff making referrals must possess knowledge of partner services and basic eligibility requirements in order to issue effective referrals. WCC staff are required to cross train in the basic services and eligibility requirements of partner programs.

#### A. Technical Assistance Guide

Specific referral processes will be developed, maintained, issued and modified as necessary in EAWDB Technical Assistance Guide (TAG) 7-18. Specific referral processes with each partner program are developed and established individually with separate implementation timelines. The TAG is to be a living document and will be updated as new referral processes are developed. The TAG will also include the compilation of services available and the basic eligibility requirements for each partner program.

The referral processes for each partner program included in the TAG are intended to be a basic framework for each office to build on. Each office has the flexibility to modify the processes for referrals to a specific partner to fit the needs in each community. Those processes are to be developed in conjunction and collaboration with the partners affected and attached to the TAG for succession planning within the structure of the system for the job centers and our partners.

#### B. Partners

The partners that will be included in the issuing and tracking of referrals by Workforce Connection Center (WCC) offices include but are not limited to:

- WIOA Title I adult, dislocated workers and youth programs
- Title II Adult Education and Family Literacy (AEL)
- Title III Wagner-Peyser programs
- Title IV Vocational Rehabilitation (DVR)
- Title V Job Corps
- Unemployment Insurance

- Veterans programs
- Temporary Assistance to Needy Families (TANF)
- Aging and Long Term Care Programs
- Migrant Seasonal Farmworker Programs

### **C. When To Refer**

When individuals access the WCC offices for services an initial assessment of their needs and abilities is required to be performed. Upon the completion of the initial assessment staff must make a determination if there are services being provided by a partner program that might benefit the customer. When it is determined that a participant might benefit from additional services that might be provided by a partner program then the choice of referral depends on the customer's needs, what arrangements, if any, have been agreed to with the service to which the customer is to be referred. With the participants' agreement, the referrals are to be provided through direct connection to the partner the referral is being issued to. Whenever possible the office will work to schedule a participant appointment with the partner and provide copies of whatever transferrable paperwork is available (e.g. assessment information, eligibility documents etc.). The referral process should eliminate as much duplication on the part of the customer as possible.

### **D. Feedback and Follow Up**

Referrals made by core partners should be made and case notes entered in the New Mexico Workforce Connection Online System (NMWCOS) reflecting the referrals made. When a referral is made, it is always useful to obtain customer feedback about the referral as well as feedback from the partner(s) to which referrals are made. A follow up call should be made to each to ensure the referral was effective and if not why. This information should also be case-noted in the NMWCOS.