

# Fresno Regional Workforce Development Board

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Blake Konczal, Executive Director

## OPERATIONAL DIRECTIVE

FRWDB OD # 33-18, Revision D

Date Released: January 29, 2020

To: All Fresno Regional Workforce Development Board Providers of Services

From: Blake Konczal, Executive Director

Effective Date: January 29, 2020

Subject: Interagency Referrals

Applicable Program: All

Revision History: Initial Release – 12/6/18; Rev B - 12/11/18; Rev C 4/4/19

This Revision D adds guidance for updating referrals in Community Pro.

The purpose of this Operational Directive (OD) is to communicate direction concerning documentation of referrals from FRWDB providers of services.

Providers of Services are to implement this OD immediately.

All participant referrals made from the Providers of Services to any agency, including other WIOA provider of services, must be documented in Community Pro <https://ca-state-center.literacypro.com/login>.

There are two methods to facilitate referrals within Community Pro:

1. External referrals
  - a. To use this method, you must have a point of contact email for the receiving agency.
  - b. The external referral function in Community Pro is used.
2. Community Pro Partner Referral – a Community Pro partner is an agency that is actively using Community Pro and has resources available in the Community Pro Catalog to which referrals may be made.
  - a. Using Community Pro, they will ensure that a client is input into Community Pro and pertinent client information is current.
  - b. A Community Pro agreement must be signed by the client
  - c. Subsequent follow-up on the referral must be performed to ensure the client uses the referral.

Community Pro partners may refer clients to the WIOA providers of services.

- Provider staff/management must have alerts configured in their profile to be notified of incoming referrals.
- Provider staff/management must follow-up with the client to ensure the referral is used and the status must be updated in Community Pro.

## Updating Referral Status

When working with inbound referrals on Community Pro, the Referral Status must be updated to show the referring agency the result of the referral. There are many status choices but FRWDB program management has determined that only a few need to be used to document referral results to our agencies. Below are the referral status options providers of services must use with the associated local definition;

- Accepted – Use this to acknowledge that you have received the referral.
- Attended - Used if the client shows up for the referral, i.e. orientation, SRT, CASAS, WIOA Eligibility.
- Cancelled – If the referral was a mistake or if the event (referral reason) was cancelled, i.e. orientation
- No Show – if after a reasonable time or after the actual time of the event, the client doesn't show up.

Please address any questions to the FRWDB Program Manager.

Attachments: Community Pro Users' Guide