

# Fresno Regional Workforce Development Board

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Blake Konczal, Executive Director

## OPERATIONAL DIRECTIVE

FRWDB OD # 03-22

Date Released: June 9, 2022

**To: All Fresno Regional Workforce Development Board Providers of Services**

**From: Blake Konczal, Executive Director**

**Effective Date: June 9, 2022**

**Subject: Unite Us Referrals Process**

**Applicable Program: All**

**Revision History: Initial Release**

The purpose of this Operational Directive (OD) is to communicate direction to process and document referrals from/to Fresno Regional Workforce Connection (WFC) Programs.

Providers of Services are to implement this OD immediately.

**All referrals made from the AJCC to any outside agency or across WFC programs must be documented in or through the Unite Us network.**

- All clients must sign the Unite Us Consent form.
  - The consent form is obtained through the Unite Us platform and must be completed in the platform before sending the first referral or creating the first case utilizing one of the following options:
    - Digital consent is signed in the platform when an applicant/participant is physically in the office meeting with staff.
    - Email or text message, with this option, the applicant/participant receives a link from where they provide an electronic signature confirming their given consent when they are not physically meeting with staff.
    - User attestation, if the applicant/participant does not have access to the internet or does not have an email account, and cannot visit the office in person, staff can use consent by attestation.
      - Staff must follow the script that appears after clicking "Go To Form" on the Unite Us platform to obtain consent.
      - Staff must attest within Unite Us that they have read the script, allowed the applicant/participant to ask questions, and verbally received their consent.

## **Outbound Referrals**

Outbound referrals occur when staff refer an applicant/participant to another agency for services beyond the scope of WIOA programs.

The referring staff will have the responsibility of following up on the referral and updating the status of the referral in the Unite Us platform until the referral is closed.

### **1. Out-of-Network**

- a. An out-of-network referral occurs when the agency to which a referral is to be made is not in the Unite Us network.
- b. The Out of Network Organization must be created prior to attempting a referral.
- c. The referral is made by staff by selecting an Out of Network organization in the Create Referral screen.
- d. An out-of-network agency must be created at each WFC location and is not accessible across WFC locations.

### **2. In-Network**

- a. In-Network partner agencies have resources available on “My Network resources” to which referrals may be made.

## **Inbound Referrals**

Inbound referrals occur when network partners refer applicants to WIOA services.

- Each provider must identify a Single Point of Contact (SPOC) to receive notifications of inbound referrals.
  - a. The SPOC will receive and manage the inbound referrals accordingly until the referral can be closed. See attached flow.

## **Applicants Not Referred in Unite Us**

Use the “Non-Referral” starting point in the flow to begin the Unite Us process for all other applicants who are not referred to Workforce Connection in Unite Us. These applicants only need to be added to Unite Us if a decision has been made to refer them to the Self Reliance Team/Young Adult Services Entrance Interview (SRT/YASEI).

## **Notifications and Status Updates**

Notifications in Unite Us are assigned within each staff’s profile. Staff must configure the notifications to ensure appropriate reminders are sent to ensure timely responses to inbound or outbound referrals.

See Page 3 for the Unite Us Process flow.

See Page 4 for the Unite Us Outbound Referral Flow

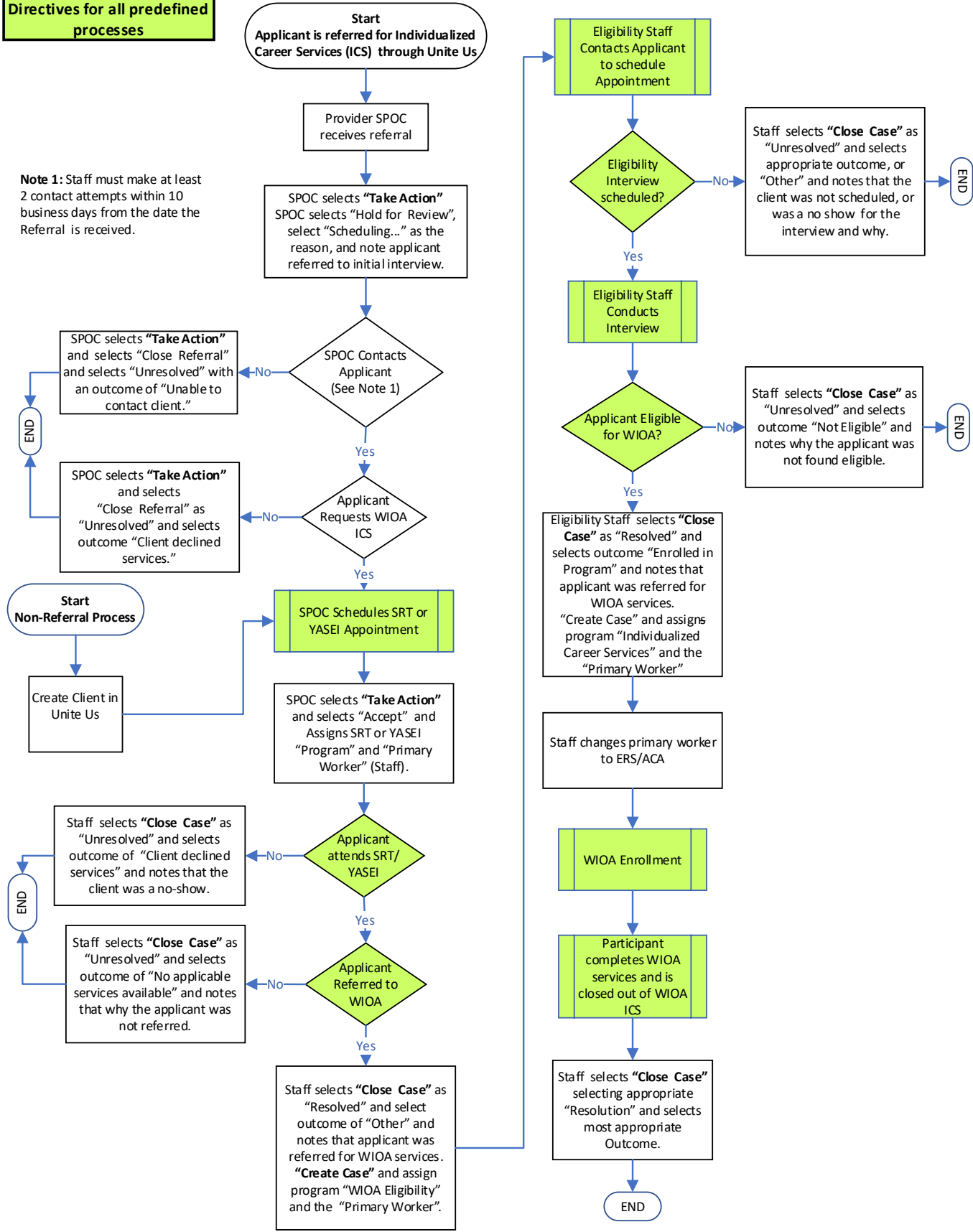
## **Attachments –**

- Unite Us Core Actions – Sending Referrals Only
- Unite Us Create New Referral – Sending and Receiving
- User Roles and Permissions Overview

Please address any questions to the appropriate FRWDB Program Coordinator.

**Provider will follow current FRWDB Operational Directives for all predefined processes**

## Unite Us Process Flow



**Note 1:** Staff must make at least 2 contact attempts within 10 business days from the date the Referral is received.

This WIOA, Title I-financially assisted program/service is an equal opportunity employer/program. Auxiliary aids and services are available upon request to people with disabilities and/or limited English proficiency.

# Unite Us Outbound Referral Process Flow

