

NEMO WDB Referral Process

Under the WIOA law, we must provide seamless, customer focused, and integrated service delivery across all programs and enhance access to our programs as well as the programs of our partners. In order to do that, we must all familiarize ourselves with the services our partners offer. We need to ensure that businesses and jobseekers have access to information and services that lead to positive employment outcomes.

REFERRAL PROCESS POLICY

The choice of referral process depends on the customer's needs and what arrangements, if any, have been agreed to with the service to which the customer is to be referred. In addition, the capacity of both the referring organization and the service to which the customer is being referred must be considered at any particular point in time. For example, a Zoom meeting cannot be arranged if all parties do not have the technology available.

Referral processes can take many forms. Referral processes can occur in a telephone environment, in face to face settings or in the form of written communication (including e-mail) or a combination of these channels. A referral process selected may combine aspects of each of these processes. There are advantages and disadvantages to all of the processes. **The NEMO WDB does not accept a cold referral, meaning telling the participant to call or visit the agency and not doing any follow-up. The case manager will utilize one of the three methods below to complete a referral.**

- (1) **Facilitated Referral:** The customer is helped to access the other service, for example, the referring organization makes an appointment with the other service on the customer's behalf, asks the other service to make contact with the customer/s or a caller is transferred to the other service. The other service is made aware of the customer, and the customer is helped to access that other service.
- (2) **Active Referral:** The referring organization, with the customer's consent, provides the organization to which it is referring the customer with information that it has collected about the customer or with its professional assessment of the customer's needs. The advantage is the customer does not need to repeat all of their story and the agency, to which the customer is referred, has relevant information about the customer. However, there is a risk that the information is communicated out of context and therefore misinterpreted by the service, which is receiving the referral, especially if not done as a 'warm' referral (see below).
- (3) **Warm Referral:** A three-way conversation with the customer (whether face to face or by telephone), the referring organization introduces the customer, and the organization being referred to explaining what has already been done to assist the customer and why the customer is being referred. This provides an open and transparent process in which information can be exchanged between all service provided involved. Issues can be clarified immediately. The customer does not need to repeat their entire story.
(This process is the best method but sometimes difficult because it relies on everyone being available at the same time.)

Before you decide on the method of referral consider the following:

- The case manager should talk to the client about the options available to see what they are most comfortable with and assist in determining the agency(s) to place a referral with.
- The case manager should decide what method of referral should be made based on:
 - Participant's ability to negotiate complex social situations
 - Participant's ability to provide and receive information
 - Participant's level of uncertainty about seeking help
 - Participant's interpersonal style (i.e. engaged, passive or argumentative)
- The case manager should ensure the customer is willing and ready to be referred.
- The case manager should talk to the client about the importance of follow-up with both agencies.
- The case manager should discuss any barriers the client might have in following up with the referral (i.e. childcare, transportation, etc.)

FEEDBACK AND FOLLOW UP

A follow up call should be made to each to ensure the referral was effective. Discussion of next steps should be discussed during this time as well.

TRACKING OF REFERRALS

Case notes must be entered in MoJobs regarding contacts and follow up made on referrals. Referrals will be monitored by the NEMO WDB and the OWD Compliance Team, so ensure you provide the correct level of detail in your case note but be careful not to include any confidential information in MoJobs. Confidential information must be placed in the participant confidential file and noted in the case note.