# NEWDB Memo 03-2022: On Line Referral Process

**Date:** March 1, 2022

**Revised:** July 1, 2022

**To:** NEWDB Staff and Service Provider

**From:** NEWDB/Michelle Bish, Executive Director

**Subject:** On Line Referral Process

# Purpose

Memo 03-2022 clarifies the process and defines responsibilities for on line referrals received in response to request for services through the web application.

# On-line Referral Process

On-line applicant emails will be forwarded and delegated to the NEWDB staff.

Upon receipt of the email, the NEWDB staff will:

* Contact the customer and determine if there is an OKJM account.
	+ If there is an OKJM account, the Team Member will update contact information and eligibility date in the demographics.
	+ During the call the Team Member will ask general eligibility questions, helping screen for WIOA Title 1 eligibility, inform applicant of documents that will be required for “next steps”, as well as services requested by the applicant.
	+ Once the call is completed, the Team Member will open a Job Service enrollment in OKJM, enter the appropriate service(s), and a program note outlining the call with the applicant.
	+ If no account is located in OKJM, the Team Member will instruct the applicant of the necessity of the OKJM account creation and continue with general eligibility conversation. Applicant will be requested to contact NEWDB staff once OKJM account is established. (NEWDB staff may open up Job Service enrollment once notified that account has been created.)
* Once the applicant has an OKJM account updated, or established, an email will be sent to Enrollment Team designated staff with name of applicant, PID, and an overview of what the applicant is requesting.
	+ NEWDB staff will utilize Business Service Team Tracker to list information on referrals received and sent to Title 1 Operations Manager. (Name/PID/date referral received/date referred to Title 1 and outcomes)
	+ If applicant does not respond to attempted contact for services, this information should be noted on the Business Service Team Tracker.