SC WORKS

PEE DEE

PEE DEE LWDA INSTRUCTION NUMBER: **WIOA 21-003**

TO: Pee Dee LWDA Contractors

SUBJECT: Required Use of SCWOS for Referrals

ISSUANCE DATE: July 8, 2021

EFFECTIVE DATE: Immediately

PURPOSE: The purpose of this instruction is to provide guidance on the required use of the SC Works Online Services (SCWOS) for customer referrals.

Background: The SC Works system brings together a series of partner programs and entities responsible for workforce development, education, and other human resources programs to collaborate in the creation of a seamless customer-focused service delivery network that enhances access to the programs, services. A referral is an "electronic form" used to introduce the individual/jobseeker to another program or provider of service and to provide a description of the type of service the individual is seeking from the provider.

POLICY: This instruction will govern the required use of SCWOS referrals conducted in the Pee Dee Workforce Development Area. It is based upon the SC Department of Employment and Workforce's policy regarding required use of referrals. The Workforce Innovation and Opportunity Act (WIOA) strongly encourages the use of an integrated system of case management, using technology to achieve alignment in service delivery that meets customer's needs, including referrals. The following programs outlined in the State's Instruction 20-14 are required to conduct all customer referrals through SCWOS.

ACTION: Staff should review and become familiar with State Instruction 20-14 (attached) which outlines the State's policy governing the provision of the required use of SCWOS for referrals.

The Contractor should:

- Ensure that all appropriate staff adhere to the Use of SCWOS for Referrals policy as outlined in the State's policy.
- Ensure that all staff follow the step-by-step instructions regarding Staff Referrals to Providers in SCWOS that are located under the Staff Online Resources in SCWOS.

- In the event an individual declines to be enrolled in the partner program that he or/she is referred to, program staff receiving the referral must document the individual's refusal by entering a detailed casenote explaining the reason why and completing the attached Program Enrollment Refusal form.

INQUIRIES: Questions regarding this instruction may be directed to April Gaskins a-gaskins@peedeecog.org at (843) 669-3138

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STATE INSTRUCTION NUMBER 20-14

To: Local Workforce Area Signatory Officials
Local Workforce Area Board Chairs
Local Workforce Area Administrators
DEW Area Directors
DEW Regional Managers
RESEA Program Director

Subject: Required Use of SCWOS for Referrals

Issuance Date: June 30, 2021

Effective Date: July 1, 2021

Purpose: To provide guidance on the required use of SC Works Online Services (SCWOS) for customer referrals.

Background: The Workforce Innovation and Opportunity Act (WIOA) places a strong emphasis on planning across multiple partner programs to ensure alignment and collaboration in service delivery. The SC Works system brings together a series of partner programs and entities responsible for workforce development, education, and other human resources programs to collaborate in the creation of a seamless customer-focused service delivery network that enhances access to the programs' services. Effective referrals are essential to maximizing resources and aligning critical services for SC Works customers.

Policy: A referral is used to introduce an individual to another program or provider of service and to provide a description of the type of service the individual is seeking. A vital responsibility of each SC Works partner is the effective referral of customers to the appropriate partner for services, in a manner that reduces duplication and ensures tracking of referrals to build accountability. Additionally, WIOA strongly encourages the use of an integrated system of case management, using technology to achieve alignment in service delivery that meets customers' needs, including referrals. In order to facilitate such a system, the following programs are required to conduct all customer referrals through SCWOS:

- WIOA Title I
- Wagner-Peyser (WP)
- Trade Adjustment Assistance (TAA)
- Jobs for Veterans State Grants (JVSG)
- Reemployment Services and Eligibility Assessment Grants (RESEA)

The use of SCWOS for referrals will foster a more streamlined referral system, while further supporting a coordinated delivery of service to SC Works customers. Additionally, electronic referrals via SCWOS can be more easily tracked, including outcomes.

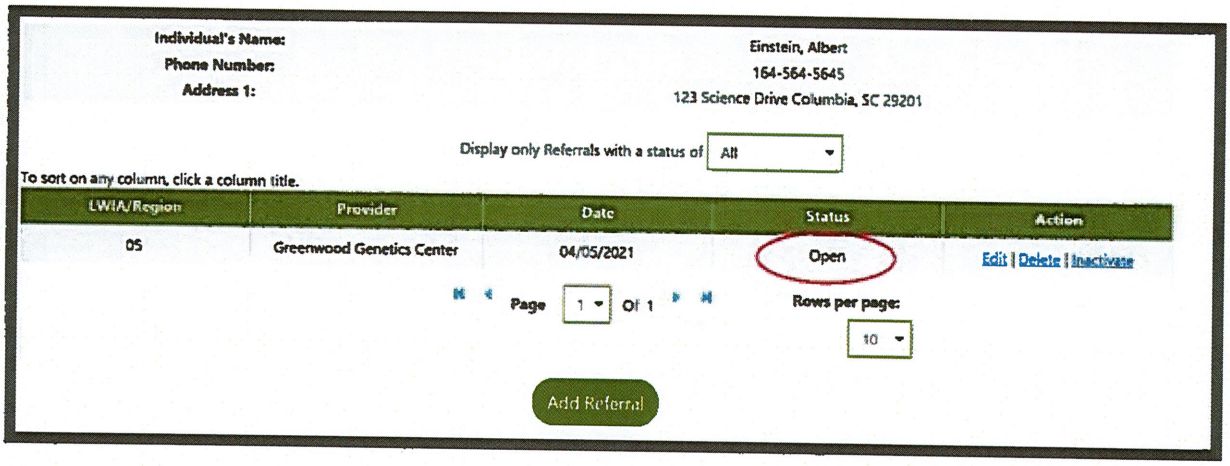
Step-by-step instructions regarding Staff Referrals to Providers in SCWOS are located under Staff Online Resources in SCWOS.

At a minimum, a referral must include:

- Name of the participant being referred;
- Date Contact Made – Date the referring partner provides referral information to referred partner;
- Referral To – partner organization receiving the referral;
- Reason for the Referral – Why the participant is being referred and/or what services are being sought; and
- An actively checked email address for the provider receiving the referral.

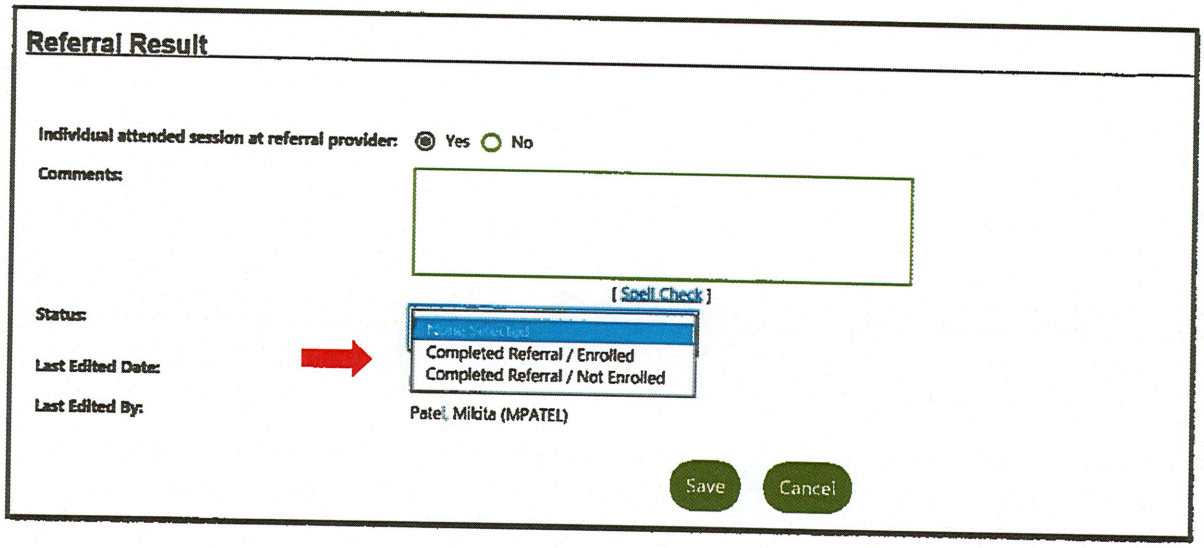
NOTE: This information must also be documented in a corresponding case note. Supporting documentation, such as a release of information form, may be attached to the case note as appropriate.

Referrals should be completed by the referring program, but the status left open at the time of referral. This indicates that a referral to a partner program has been made, but the outcome is not yet known.



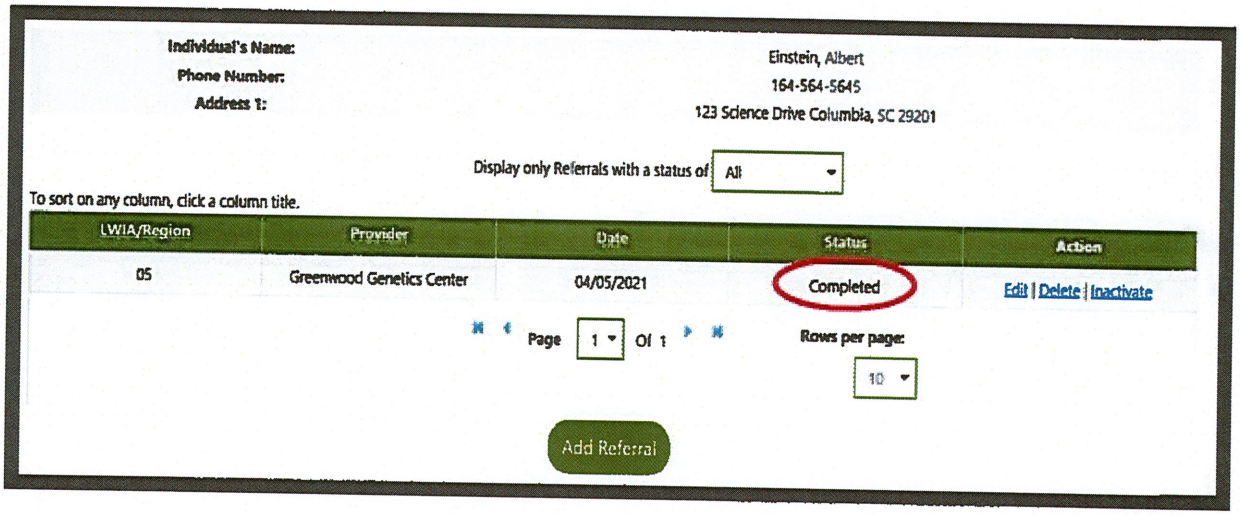
Recording Outcomes

Referral outcomes are recorded by closing a referral. Upon receipt of a referral from a partner program, the referred to program staff is responsible for closing the referral by recording the appropriate outcome as defined below.



Outcome Definitions

- A "*Completed Referral/Enrolled*" outcome is defined as a referral that was received by the referred to program and the individual referred was enrolled in the program.
- A "*Completed Referral/Not Enrolled*" outcome is defined as a referral that was received by the referred to program, but the individual referred was not enrolled in the program.



If an individual declines to enroll in the partner program referred to, program staff receiving the referral must document the individual's refusal by:

- Entering a case note in SCWOS outlining that the individual is declining to enroll in the partner program and why; and
- Complete and attach the *Program Enrollment Refusal Form* (located in SCWOS under Staff Online Resources) to the case note.

To ensure referrals are being closed and outcomes recorded, supervisory program staff should monitor the "Staff Referrals Report" in SCWOS under Detailed Reports.

Action: Ensure that all staff receive and understand this policy.

Inquiries: Questions may be directed to PolnPro@dew.sc.gov.

Kevin Cummings, Assistant Executive Director
Technical Services, Policies, and Reporting

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Program Enrollment Refusal Form

Individual's Full Name: TYPE NAME

SCWOS State ID: _____

I have discussed the benefits and services provided under the TYPE PROGRAM NAME Program with the individual referenced above.

_____
Program Staff Signature

_____
Date

_____
Program Staff Printed Name

I have been given an overview of the services and benefits provided under the Program listed above. All of my questions were answered satisfactorily. I understand that by signing this form I am refusing the right to enroll in the program, at this time.

_____
Individual Signature

_____
Date

_____
Individual Printed Name