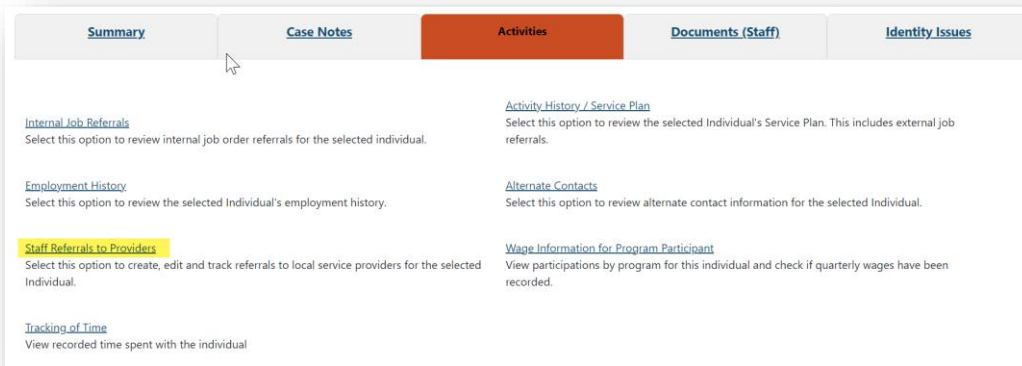


Staff Referrals to Vocational Rehabilitation Providers in WorkInTexas.com

To Create Staff Referrals, Local Workforce Solutions Office staff members must do the following:

1. Log in to a WorkInTexas.com staff account.
2. Ensure that the customer receiving the referral is a current workforce program participant and is assigned to a local Workforce Solutions Office staff member.
3. Select **Manage Individual > General Profile > Activities**.
4. Select **Staff Referrals to Providers**.



5. After selecting **Staff Referrals to Providers**, verify the individual's name, phone number, and address.
6. Select **Add Referral**.
7. Complete all the required fields (*) in the **General Information** section, including **LWDB/Region** and **Date of Referral**.
8. Select the **Program Making Referral** type from the drop-down menu. Options include Title I–Workforce Innovation and Opportunity Act (WIOA), Title III–Wagner-Peyser (W-P), Supplemental Nutrition Assistance Program (SNAP) Employment and Training (E&T), Trade Adjustment Assistance (TAA), and Choices.
9. Update a customer's general information by selecting **Edit Individual Profile**. Changes to a customer's profile **can only be made if the customer is present and available** to approve the changes.

Staff Referrals

Currently Managing

This page allows you to modify or enter information about the individual and the provider to whom they are being referred.

★ Indicates required fields.

General Information

User ID:

Referral Staff User:

★ LWDB/Region:

None Selected

★ Date of Referral:

05/20/2024

📅 Today

★ Program Making Referral:

None Selected

Partner Program Tracking Number:

[Edit Individual Profile](#)

First Name:

Middle Initial:

Last Name: (including suffix e.g. Jr, Sr, PhD, etc.)

Address 1:

Address 2:

City:

State:

Zip: (99999-9999)

Phone Number:

Alternate Phone Number:

Special Program:

None Selected

10. Enter **Type of Referral** by completing all required fields as follows:

- To complete **Referral Type**, select **Other**.
➤ Complete **Other Description**.
- Enter **Reason for Referral**.
- Enter **Additional Information Regarding Referral** in the box provided.

Type of Referral

★ Referral Type:

☒ Other

★ Other Description:

★ Reason for Referral:

★ Additional Information Regarding Referral:

11. Complete the **Special Instructions** section by answering the following questions:

- **Does the individual need an interpreter? Yes or No**
- **Individual is a veteran: Yes, No, or Did not disclose**

- **Is the individual their own legal guardian? Yes or No.** If the individual is a minor, document the approval of their parent or legal guardian.

Special Instructions

- * **Does the individual need an interpreter?** ☐ Yes ☐ No
- * **Individual is a veteran:** ☐ Yes ☐ No ☐ Did not disclose
- * **Is the individual their own legal guardian?** ☐ Yes ☐ No

12. Complete the **Provider Information** section as follows (Texas Workforce Commission will create provider accounts for each Vocational Rehabilitation management unit):
 - Select **Referral To** and search for the provider in the pop-up window. Search for “Texas Workforce Commission” and select **Provider ID 1072276**.
 - This will auto-populate the **Provider Name**.
 - Select **Location**, using the drop-down menu to select the corresponding location.
 - After selecting the location, the system will auto-populate the **Address**, **City**, **State**, and **Zip** fields.
 - Select **Contact Person** by using the drop-down menu. Once the contact person is located, the system will display the contact person name, phone number, and email if available.

Provider Information

Referral To: [Search for Provider \(Opens in a new window\)](#)

* Provider Name:

Location:

* Address 1:

Address 2:

* City:

* State:

* Zip: (99999-9999)

Contact:

* Contact Person:

* Contact Phone: - - Ext.

Contact Email:

Contract:

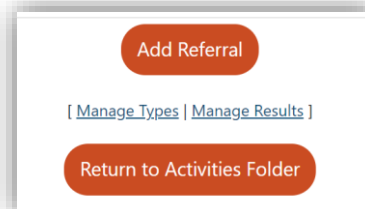
Program/Service:

13. After completing the referral, choose **Save** or **Save & Print**.

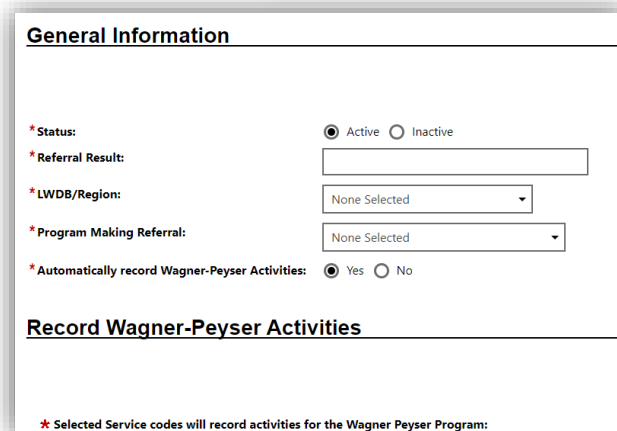
Providing Referral Results

Staff may create a referral result and update a referral with outcome information using the following steps:

1. On the **Staff Referrals to Providers** page, select **Manage Results** under **Add Referral** button to create a referral result.
2. Select **Add Referral Result** button.
3. Complete **General Information** section.
4. If **Program Making Referral** is **Title III - Wagner-Peyser (W-P)**, select **Yes** for **Automatically Record Wagner-Peyser Activities**, then select **164 - Referral to Vocational Rehabilitation (VR) services** under **Record Wagner-Peyser Activities**.
5. If **Program Making Referral** is not **Title III - Wagner-Peyser (W-P)**, select **No** for **Automatically Record Wagner-Peyser Activities**. Program services may be entered on the applicable program application ribbon, as appropriate.
6. Select **Save** button on bottom of page to save the referral result.
7. Find and select referral by clicking the **Edit** hyperlink on the **Staff Referrals List**.
8. Scroll down to the **Referral Result** section of the **Referral Entry** page.
9. Update **Individual attended session at referral provider** with appropriate answer and add **Comments**, as appropriate.
10. Select referral result entered previously using **Status** drop-down.
11. Save the referral with updated information.



A button labeled "Add Referral" in orange. Below it are two links: "[Manage Types | Manage Results]". At the bottom is another orange button labeled "Return to Activities Folder".



General Information

* Status: ☒ Active ☐ Inactive

* Referral Result:

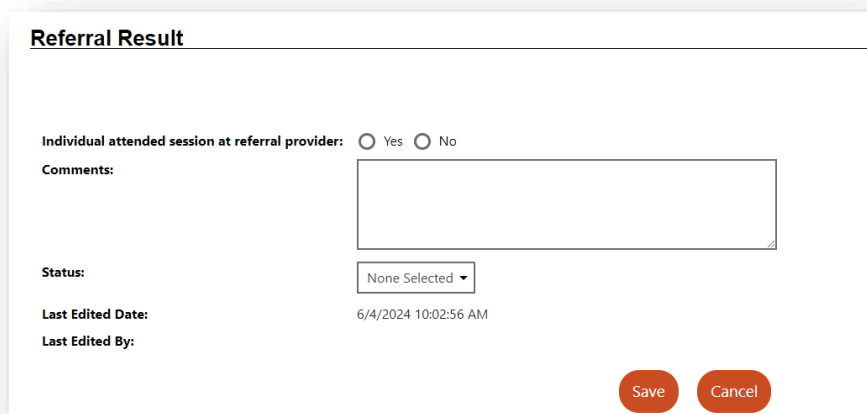
* LWDB/Region:

* Program Making Referral:

* Automatically record Wagner-Peyser Activities: ☒ Yes ☐ No

Record Wagner-Peyser Activities

* Selected Service codes will record activities for the Wagner Peyser Program:



Referral Result

Individual attended session at referral provider: ☐ Yes ☐ No

Comments:

Status:

Last Edited Date: 6/4/2024 10:02:56 AM

Last Edited By:

Perform the following steps to run Staff Referrals reports:

1. Navigate to **Reports > Detail Reports > Case Management Reports > Staff Referrals**.
 - These reports may be run by multiple options, including referral type, provider, or staff.
2. Indicate **Active** under **Region/LWDB Status**.
3. To run the report by **Referral Type**, select **Region/LWDB**.
4. Select an **Office Location** or indicate **None Selected**.
 - Select **Program** from a drop-down menu including: WIOA, W-P, SNAP E&T, TAA, and Choices.
Note: The only programs reflected on the screen will be those that provided referrals.
5. To run the report by **Special Program**, select this option.
6. To run the report by a specific **Provider**, select the provider.
7. Additionally, staff may run the report by **Referral Status** or **Program Service**.
8. Select **Active** under **Staff Status**.
9. Staff can search using a customer's last name or username under **Search By**.
10. Select a **Date Range** for the report. Multiple options exist.
11. Run the report.

Required Staff Permissions

WorkInTexas.com liaisons must assign staff the correct corresponding permissions as follows:

1. Log into the WorkInTexas.com Administration site.
2. In **Admin Services**, select **Staff Administration** to modify the staff member account with appropriate privileges.
3. Select **Administer a Staff Account** to make changes to the staff member account.
4. Navigate to the **Staff Referral to Providers** section under the **Individual Activity Tab**.
In this section, the liaison staff must update the following privileges as follows:

- **Staff Referrals to Providers** - Local Admin¹
- **Delete Staff Referrals to Providers** - Yes²
- **Staff Referrals to Providers - Manage Types** - Yes¹
- **Staff Referrals to Providers - Manage Results** - Yes¹
- **Staff Referrals to Providers Edit of Referral Results section ONLY for all LWDBs** - No

The screenshot shows the 'Individual Activities Tab' in the WorkInTexas.com administration interface. It contains a table of permissions for a staff member. The permissions are as follows:

Individual Activities Tab	
	Set all to high Set all to low
Alternate Contacts	Full
Employment History	Yes
Staff Referrals to Providers	Local Admin
Delete Staff Referrals to Provider	Yes
Staff Referrals to Providers-Manage Types	Yes
Staff Referrals to Providers-Manage Results	Yes
Staff Referrals to Providers-Allow Edit of Referral Results section ONLY for all LWDBs	Yes

¹ All staff members who will be expected to process referrals in WorkInTexas.com will require access to **Referrals** and **Managed Referrals** in their Local Workforce Development Board area.

² Liaisons may determine whether staff are allowed to delete referrals based on local policy and procedures.