

LOCAL INSTRUCTION NUMBER 23-02

To: Local Workforce Development Area
Subject: **SCWOS for referrals**
Issuance Date: 04/06/2023
Purpose: To provide guidance on closing SCWOS generated referrals

References:

State instruction number 20-14 <https://scworks.org/sites/scworks/files/content/policies-and-procedures/State-Instruction-20-14-Required-Use-of-SCWOS-for-Referrals.pdf>

Background: 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 customer to the appropriate partner for services in a manner that reduces duplication and ensures tracking of referrals to build accountability.

Policy: At a minimum, a referral must include:

- Name of the participant being referred
- Date Contact Made
- Referral to-partner organization receiving the referral
- Reason for referral
- An actively checked email address for the provider receiving the referral.


Note: This information must also be documented in a corresponding case note.

Recording Outcomes: Staff initiating referral must close referral, upon receipt of a referral from a partner program or once verification has been received participant has/hasn't completed the referral.

If for any reason the staff is unable to record an outcome, the staff must notify the Grantee by submitting the participant's name and state ID so appropriate action can be taken to close the referral in a timely manner.

Action: Please ensure that all appropriate staff receive and understand this policy. Staff should refer to State instruction 20-14 for further instructions on opening and closing referrals.

Inquiries: Questions may be directed to abaker@catawbacog.org



Amanda Baker, WIOA Administrator