

**Departments:** Business Solutions Team, Career Planners

**1. Purpose:** To standardize the Pre-Screening Process for reverse referrals and walk-ins/first time customers.

**2. Responsibilities:**

**a. Business Solutions Representative (BSR):** For reverse referrals, the BSR is responsible for:

- i. Connecting with the designated Pre-screening CP to request a pre-screening call
- ii. Share application link with business – request that the individual return the application within 24 hours.
- iii. Notify the business that while the individual can qualify during the pre-screen, issues around eligibility may arise during enrollment which may cause the individual to not be eligible for funding.

**b. Career Planner (CP):** The CP is responsible for:

- i. The primary or secondary screener will use the Intake Screening Guide form and Pre-screen Script to pre-screen individuals for all programs.
  1. Reverse referrals: Based upon the initial screening and the application, the CP will notify the BSR if the individual does or does not qualify for our programs.
  2. Walk-Ins: Provide an overview of FCI programs and services, explain benefits of program enrollment, and provide application.
- ii. If individual appears to qualify, the screener will refer the individual to CP for program enrollment.

**3. Process:**

**a. Walk-in / First Time Client Process:**

- i. When notified by WDC reception that a new client is in the lobby, the primary or secondary screener will meet briefly with client and inquire about client needs.
- ii. Based on needs, CP will provide an overview of FCI services that could meet those needs and screen for possible FCI program enrollment using the Intake Screening Guide form.
- iii. For those who appear eligible and interested, an application for services will be provided along with clear instruction on next steps.
  1. Complete application and return it to CP
  2. Provide most appropriate CP's business card
  3. Collect client's name and phone number, provide to most appropriate CP for follow-up
- iv. For those who do not appear eligible or interested, CP will direct to other WDC or community resources to meet client needs.



**b. Reverse Referral Process:**

- i. Once a business has identified an individual and has notified the BSR, the BSR will provide the business with a link to the standard program application form. The BSR will request that the business have the individual submit the application form to the standard email within 24 hours. The BSR will also notify the CP to provide the individual's information and request a pre-screen.
  1. The BSR will also notify the business that while the individual can qualify during the pre-screen, issues around eligibility may arise during enrollment which may cause the individual to not be eligible for funding.
- ii. Once the application is received from the individual, the CP will reach out to pre-screen the individual using the *Intake Screening Guide* form and *Pre-screen Script*.
- iii. Following the pre-screen call, the CP will update the BSR on if the individual qualifies for the program or not.
  1. If the individual does not qualify, the BSR will contact the business.
  2. If the individual does qualify, the BSR will contact the business and the Screener CP will connect with the program CP to start the enrollment process.

#### **4. Additional Resources**

- a. See *Case Management Manual*
- b. *Reverse Referral Pre-screening Script*
  - i. "Hello, my name is... from Forward Careers. I am reaching out to you because ... business is interested in hiring you and is looking to use training dollars to assist with the hiring process. To see if this is an option, I am going to ask you a few questions to determine if you qualify for any of our training programs. All information that you share with me will remain confidential and will not be shared with ... business. Please disclose as much information as you feel comfortable doing as this will help to determine your eligibility."
  - ii. When asking about if an individual has a disability, please provide options such as: "Do you have a disability? A disability would include any mental limitations such as a learning disability, or a physical limitations such as hearing, visual, or mobility. All information that you share with me will remain confidential and will not be shared with ... business. Please disclose as much information as you feel comfortable doing as this will help to determine your eligibility."

#### **5. Back-up**

- a. Each BSR and CP is responsible to communicate and provide the details of his/her back-up with everyone.

