

Quick Start Guide: Targeting, Referral, and Feedback System

Overview of TRF System

The TRF initiative is a partnership between Employment and Social Development Canada (ESDC) and the Ministry of Labour, Immigration, Training and Skills Development (MLITSD) to support Employment Insurance (EI) applicants to return to work more quickly.

Implementation of the TRF System is a condition of the amended Labour Market Development Agreements (LMDA) that provinces and territories signed in December 2016. Based on the performance measurement criteria that the province has agreed to under the LMDA, the province is required to exchange information with ESDC on EI applicants referred to EO programs and the outcomes of contact attempts.

The objective of the TRF system is to enable the province to actively target EI applicants in order to direct them to relevant programs and services or job opportunities. TRF also promotes proactive client engagement, as well as complements and supplements existing provincial programs and services by identifying and engaging clients.

Component	Description
Targeting	<ul style="list-style-type: none">• Enables the ministry to filter and target EI applicants based on criteria sets in each catchment area.• The ministry can adjust the criteria sets, through working collaboratively with the SSMs.
Referral	<ul style="list-style-type: none">• A list of EI applicants that meet the criteria established by the ministry is received and shared with the SSM through the Case Management System (CaMS).• There is a 14-day delay between when the prospect applies for EI through Service Canada and when they show up as a referral to the SSM.• The SSM is required to contact referred EI applicants within the established timeframe.
Feedback	<ul style="list-style-type: none">• SSMs record their attempts to contact the targeted EI applicants.• The ministry reports the records of contact attempts to the federal government.

General Process

Each day, the CaMS system will refer a list of TRF clients to the SSM, who will then follow this process:

1. The SSM will contact the clients, offer service, and record the result in the CaMS TRF Application.
2. If the client agrees to service, the SSM will forward the CaMS TRF Application to a Service Provider
3. The Service Provider will review these referrals daily and will proceed to the intake and assessment phase with the referred client.
4. The Service Provider will assign an outcome to the client's TRF Application in CaMS and will activation an EO Case and an Employment Action Plan.
5. All TRF Applications must be closed and assigned an outcome by the SSM/Service Provider to be considered fully processed and completed by the EO Network.

Quick Start Guide: Targeting, Referral, and Feedback System

It is the responsibility of the SSM to ensure that the referred clients have their first contact by the end of the next business day and the second contact attempt completed within two weeks.

It is the responsibility of the Service Provider to follow-up on referrals made, initiating the full intake and assessment process, within 2 business days of receiving them from the SSM.

Service Standards

Ministry Service Standards	
1.	Upon receipt of the TRF EI applicants, the first contact attempt by the SSM should be conducted by close of business the following business days. <ul style="list-style-type: none">For reporting, as tracked on CaMS, “by close of business” means by 11:59 pm on the following business day.
2.	A minimum of two (2) documented attempts (first contact + second contact) must be made by the SSM to reach the applicant within a two-week time period. <ul style="list-style-type: none">If the first contact attempt is successful (i.e., TRF referral CaMS status is indicated as “Closed” or “Outcome Assigned”), no further contact attempts are required.A two-week period is considered 10 business days.

Locating TRF Referrals

The SSM will contact all TRF Applicants to offer services through the Employment Ontario network following a prescribed script and internal protocols. The SSM will record the contact attempts in CaMS (date of contact, contact method, result of contact).

If TRF applicants indicate that they **do not want EO service**, no action is required on behalf of a Service Provider (follow up will be recorded and their application will be closed by the SSM).

If TRF applicants **agree to receiving EO services**, the SSM will:

- Ask the client if they have a preference of Service Provider
- If no choice is indicated – using their location, identify an appropriate Service Provider
- Advise the client of the selection and obtain confirmation to process the referral
- Record Follow Up in CaMS (result: “client has identified desired service” and add a comment that the referral has been forwarded for intake and assessment).
- Forward the Application to the appropriate Service Delivery Site (i.e. Service Provider) and include any relevant comments (e.g., existing EO Case, “In Progress” CA if applicable).

Service Providers are responsible for reviewing these referrals daily and will proceed to the intake and assessment phase with the referred clients following the same service standards as all other referrals.

For Service Providers to find referrals in CaMS:

- On the Workspace, select “*Search for an Application/Referral*”
- Under Service Delivery Site, select your organization from the drop down menu.
- Under Application Type, select “**TRF**”.
- Select Search to view your results.
- To view the referral, select the link in the *Application Number* column.

Quick Start Guide: Targeting, Referral, and Feedback System

Service Providers should use the following intake and assessment process:

1. Locate the client's TRF Application in CaMS, as noted above.
2. Contact the client to arrange an intake appointment (follow your organization's internal protocols).
3. Verify client's identity and EO eligibility.
4. Conduct a check of the client's name, DOB, and/or SIN in the Common Assessment Tool and CaMS to confirm there is no "In Progress" CA and no active EAP for the client.
 - a. If there is an "In Progress" CA, proceed to complete this CA and do not start a new one.
 - b. If there is an active EAP for that client, contact the SSM Intake General Line for next steps; otherwise proceed to the next step to complete the intake process.
5. In the CA Tool, create a new assessment, complete the consent process, and **complete Modules 1 and 2** with the client.
6. Assign the completed CA to the appropriate internal staff member or yourself, and click **submit**.
7. Register the client in CaMS using the TRF Application.
 - a. In their Application, click the ellipses (3 dots) in top right and select Close Application (reason: "Appointment Scheduled").
 - b. In their Application, click the ellipses in top right and select Record Outcome (reason: "Registered for SSM assisted services" or other depending on outcome of assessment).
 - c. Select "Create Employment Ontario Case"; This will automatically open any existing EO cases, which you can use to create a new EAP for the client, or will allow you to register the client if they are new to the CaMS system.
8. Complete an Employment Action Plan with the client in CaMS.
9. Invite the client to the Jobs Portal using the "Invite Client" function found on the **My Clients/People** tab on the left side menu; link the client's Jobs Portal account to their CaMS profile.

CaMS Records Management

The SSM will be responsible for recording follow-ups and closing referrals after contact attempts have been made.

For clients interested in receiving services and referred to Service Providers, the Service Providers are responsible for recording outcomes and creating an EO Case for TRF Applications after completing the intake and assessment process.

Record Outcomes	<p>Each TRF application referred to Service Providers must be assigned an outcome to be considered completed/fully processed by the EO network.</p> <ol style="list-style-type: none">1. From the Application Home Page, click the Action Button at the top right (...) and select Record Outcome.2. Select an Outcome from the dropdown list and change the date if needed.3. Click Save.
------------------------	--

Quick Start Guide: Targeting, Referral, and Feedback System

<p>Create an Employment Ontario Case</p>	<p>An outcome must be assigned to the referral before an Employment Ontario case can be created.</p> <ol style="list-style-type: none"> 1. From the Application Home Page, click the Action Button at the top right (...) and select “Create Employment Ontario Case” 2. Use the search feature to determine whether the person is already registered in EOIS-CaMS. If a matching record appears, follow the normal business process. If no match is found, select “Continue”. 3. Some information will pre-populate from the referral record. Enter the rest of the information. 4. Select “Register”. 5. Continue to the Employment Ontario homepage to proceed with the registration process <p>Note: When creating a new service plan</p> <ul style="list-style-type: none"> • The referred in field will be defaulted to “Targeting, Referral and Feedback”. • Select “No” from the drop-down menu for Self-Service Initiated. • For more information, go to myEOIS and see: EOIS-CaMS: Service Provider User Guide (gov.on.ca) (https://www.myeois.tcu.gov.on.ca/wp-content/uploads/EOIS-CaMS-Chapter-6-Employment-Ontario-Case-and-Client-Profile.pdf).
---	---

The following are TRF Application status notations, explained for reference:

<p>Submitted</p>	<p>The TRF application has been submitted by the Ministry to the SSM in CaMS and no SSM action has yet been recorded.</p>
<p>Open</p>	<p>The TRF application has been opened and viewed by the SSM in CaMS.</p>
<p>In Progress</p>	<p>The TRF application has been initiated by the SSM (contact attempts are currently in progress but no outcomes have been reached).</p>
<p>Forwarded</p>	<p>The TRF applicant was interested in service and the application has been forwarded to a Service Provider for intake and assessment.</p>
<p>Closed</p>	<p>The TRF application has been closed and no further action is required (either due to client not interested in service, client not reachable, or service has been initiated and they have an active EO case).</p>
<p>Outcome Assigned</p>	<p>Outcome assigned by the Service Provider after completing the intake and assessment process (either registered for service, referred out for other services, or not suitable for services). An outcome must be assigned to the referral before an Employment Ontario case can be created.</p>