WINDSOR REGIONAL
Employment Network

Job Aid: Targeted, Referral and Feedback System

Actions	Steps

Search for a TRF	*Note: When searching for TRF, please be careful not to click on applications that are not within your organization/catchment area; clicking on application will change their status to "OPEN".*
	
	1. Log into CaMS
	2. From the " My Shortcuts" list on the Workspace page select "**Search for an Application/Referral**"
	3. The Application/Referral Search tab will open. To locate the TRFs that have been assigned to you use the following Search Fields:
	    o Service Delivery Site: Select your Service Provider
	    o Catchment Area: Windsor-Sarnia
	    o Status: Forwarded and Open
	    o Application type: TRF
	4. Click "**Search**"
	5. Select the application you wish to open

Contact Client	*Note: First contact must be made within 2 business days of when an application was received. The second contact attempt must be made within 10 days of when an application was received.* ***Two contact attempts must be made by phone, email, or letter and follow-ups recorded for each, as outlined below in next section (Record Follow-Up) before application can be closed.*** 1. Locate client's contact information phone, email address from Application Home Page 2. Proceed to call, email or mail letter to client.

Record Follow-Up	1. From the Application Home Page, click the **Action Button** at the top right (**…**) and select "**Record Follow-Up**".
	2. Fill out the **Contact Details** section.
	    o Contact method
	    o Contact Result
	    o Contact Date (will auto-populate to today's date)
	3. If you have an interview scheduled with the client today or previously, fill out the **Interview Details** section.
	    o Interview Result
	    o Other (specify)
	    o Interview Date (*you cannot enter a future date. Enter date interview was supposed to occur*)
	4. Click "**Save**".

***Forward Application* (return to SSM)**	*Note: If it is determined during initial contact that a client would benefit from services provided by another Service Provider or if referral was not appropriate, you can forward the TRF application back to the SSM.* 1. From the Application Home Page, click the **Action Button** at the top right (**…**) and select **Forward Application**. *2.* The Forward Application window will pop up. Click the '**Magnify Glass'** to search for the Service Delivery Site you will be forwarding the application to (SSM) *3.* Using the Search Field type in SSM and click search *4.* Select the **SSM** from the search results list *5.* Click box beside "Client Consent" *6.* Select a Reason from the drop down list *7.* Click "**Save"**.
Close Referrals	*Note: Referrals cannot be closed to "**Client not Interested**" until the second contact attempt has been recorded. If client is interested and an intake appointment is made with client, record a follow-up then close referral.* 1. From the Application Home Page, click the **Action Button** at the top right (**…**) and select **Close Application**. 2. Select the **Closure Reason** from the dropdown list and click "**Save"**
Complete Intake Appointment	*Note: If Client fails to attend appointment- record an outcome- Select "**Outcome Not Available**"* 1. Follow business protocols to complete an Intake with the client. 2. Complete CA (Common Assessment) and EAP (Employment Action Plan) in CaMS.
Record Outcome	*Note: An Outcome can be recorded once an application is closed. If an application was closed to 'Client not interested' you do not need to add an Outcome; 'Outcome not available' will assign to the application automatically.* 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. (Note you cannot use a future date) 3. Click "**Save".** 4. The outcome status will change from "Closed" to "Outcome Assigned