Targeted, Referral and Feedback (TRF)

Guide to Processing TRF Applications in CaMS

WINDSOR REGIONAL
Employment Network

Processing a TRF Application

Search for TRF app in CaMS

Contact Attempts

(Mail, Email, phone)

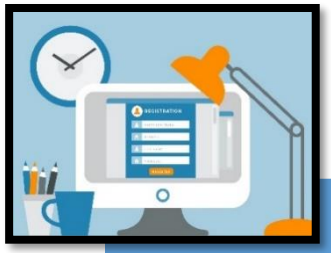
Record a Follow up

Close Application

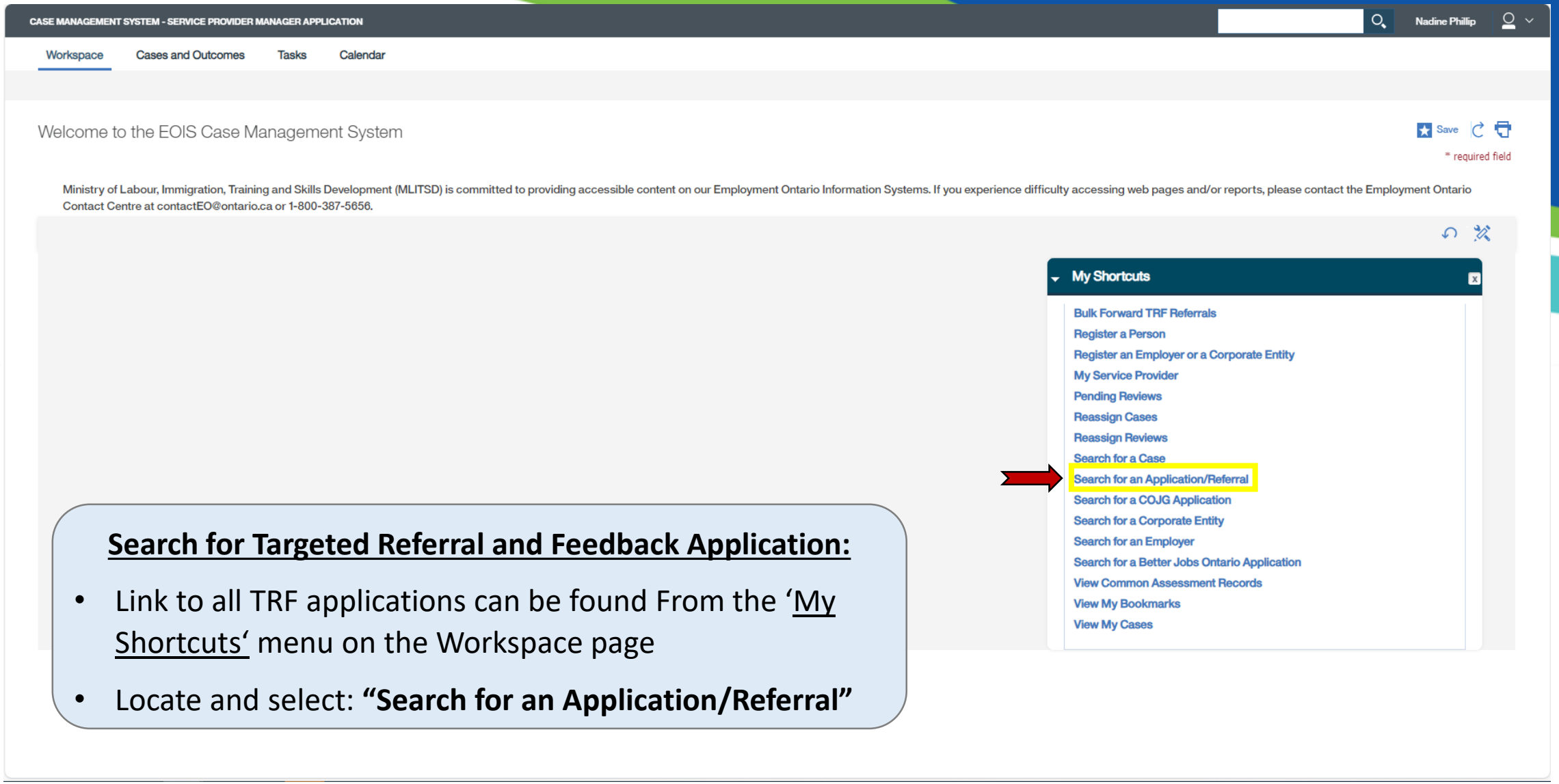
Schedule Appointment

Complete CA and EAP

Record Outcome



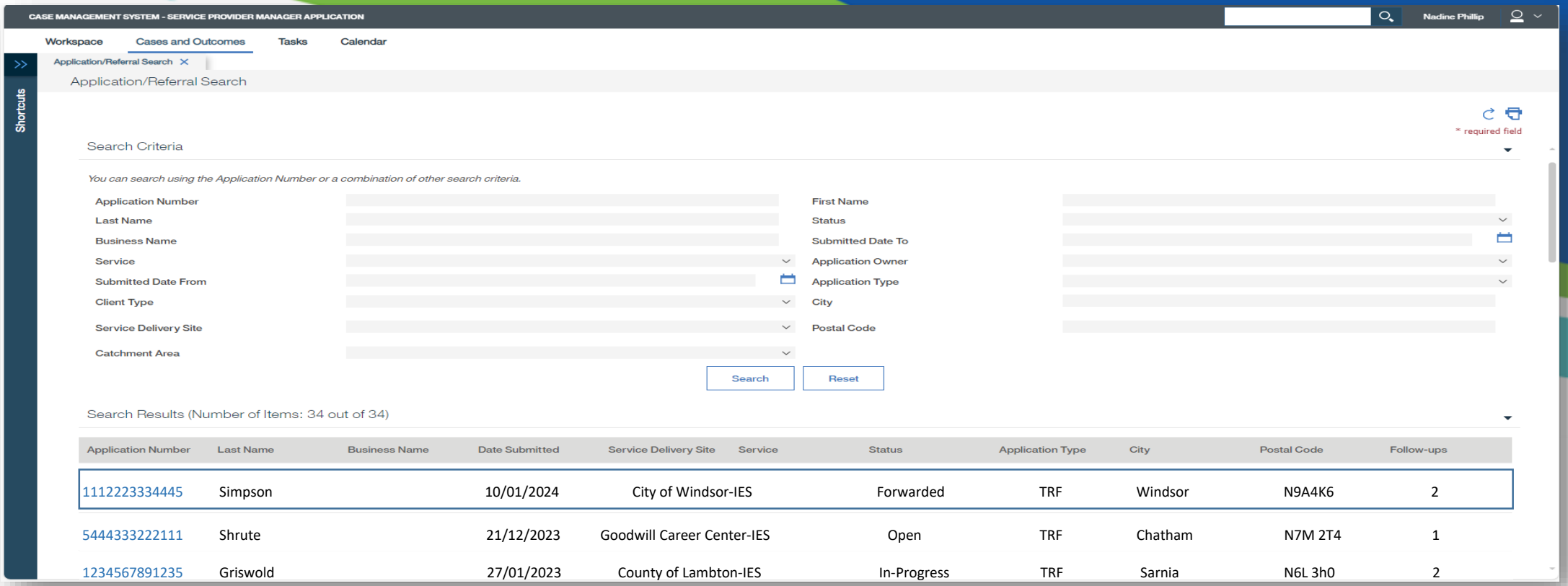
Search for TRF Application



<u>Search for Targeted Referral and Feedback Application:</u>

- Link to all TRF applications can be found From the '<u>My Shortcuts'</u> menu on the Workspace page
- Locate and select: **"Search for an Application/Referral"**

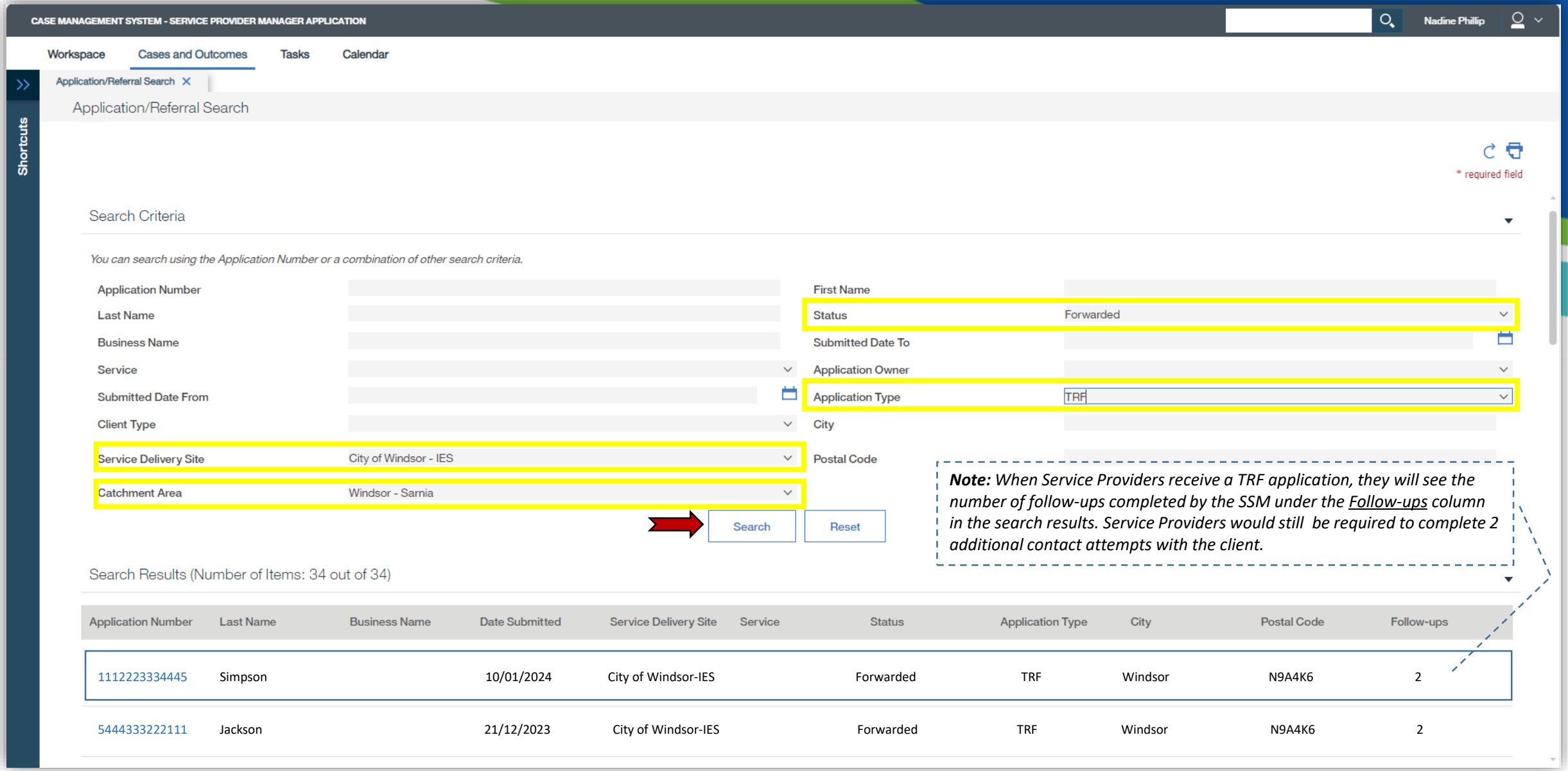
Search for TRF Application



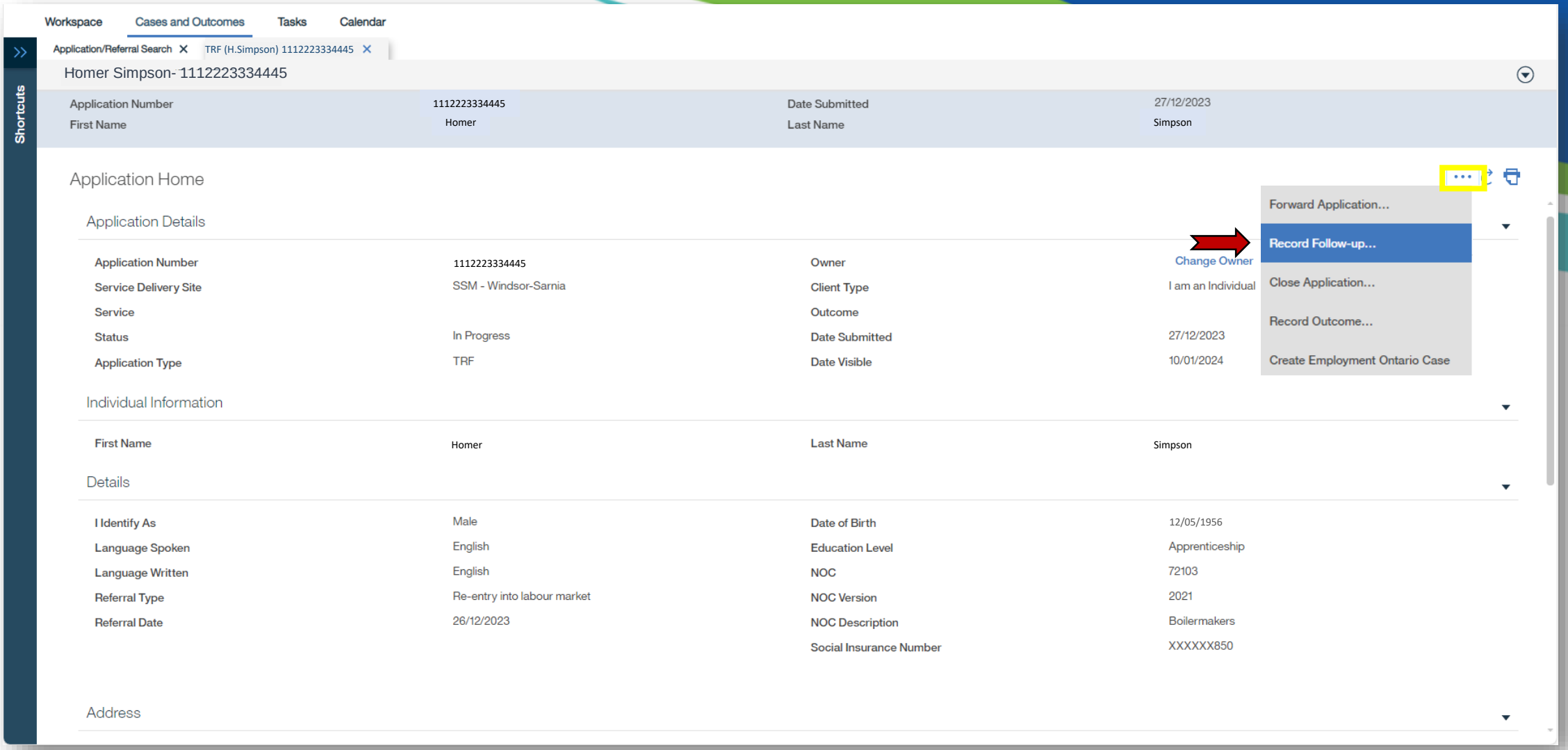
Note:

- First contact attempt must be completed within 2 business days of when application was received
- Second attempt must be made within 10 days of when application was received
- Search **Forwarded and/or OPEN** Status'
- Clicking on an Application Number will change the status of the TRF application to "OPEN" beginning the Service
- Standard time frame (eg. contact made by end of next business)
- ***Only click into TRF applications that are assigned to you/ your organization; Opening other applications outside your delivery site will change to status of the application***

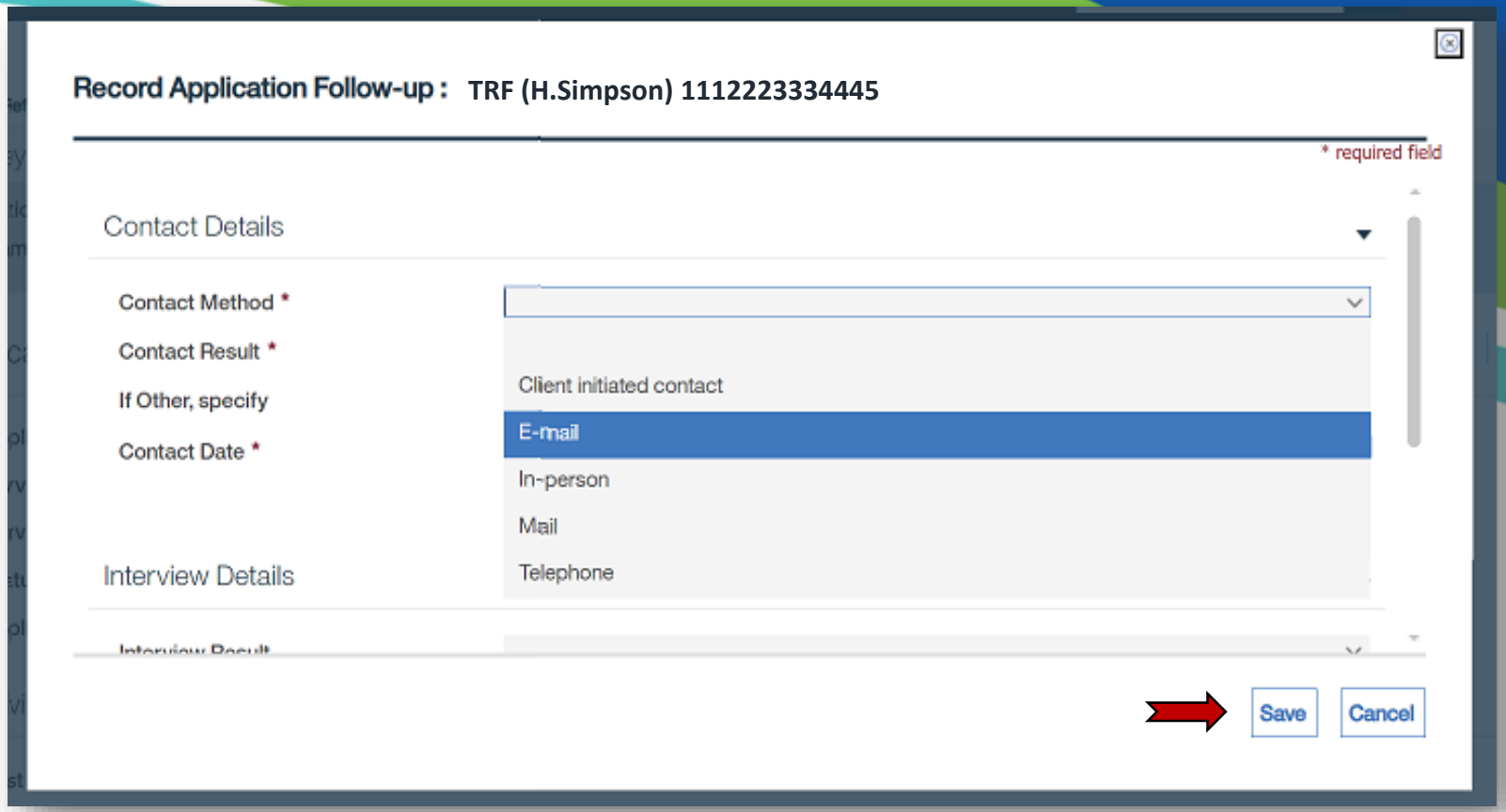
Search for TRF



Contact and Record a Follow-up



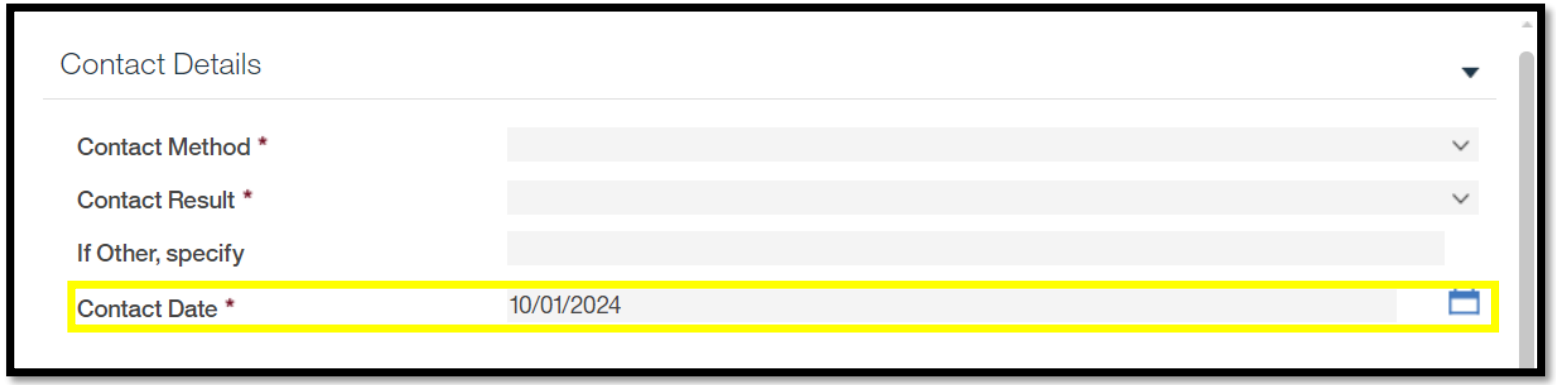
Record a Follow-up



CONTACT METHOD OPTIONS:

- Client initiated contact
- Email
- In person
- Mail
- Telephone

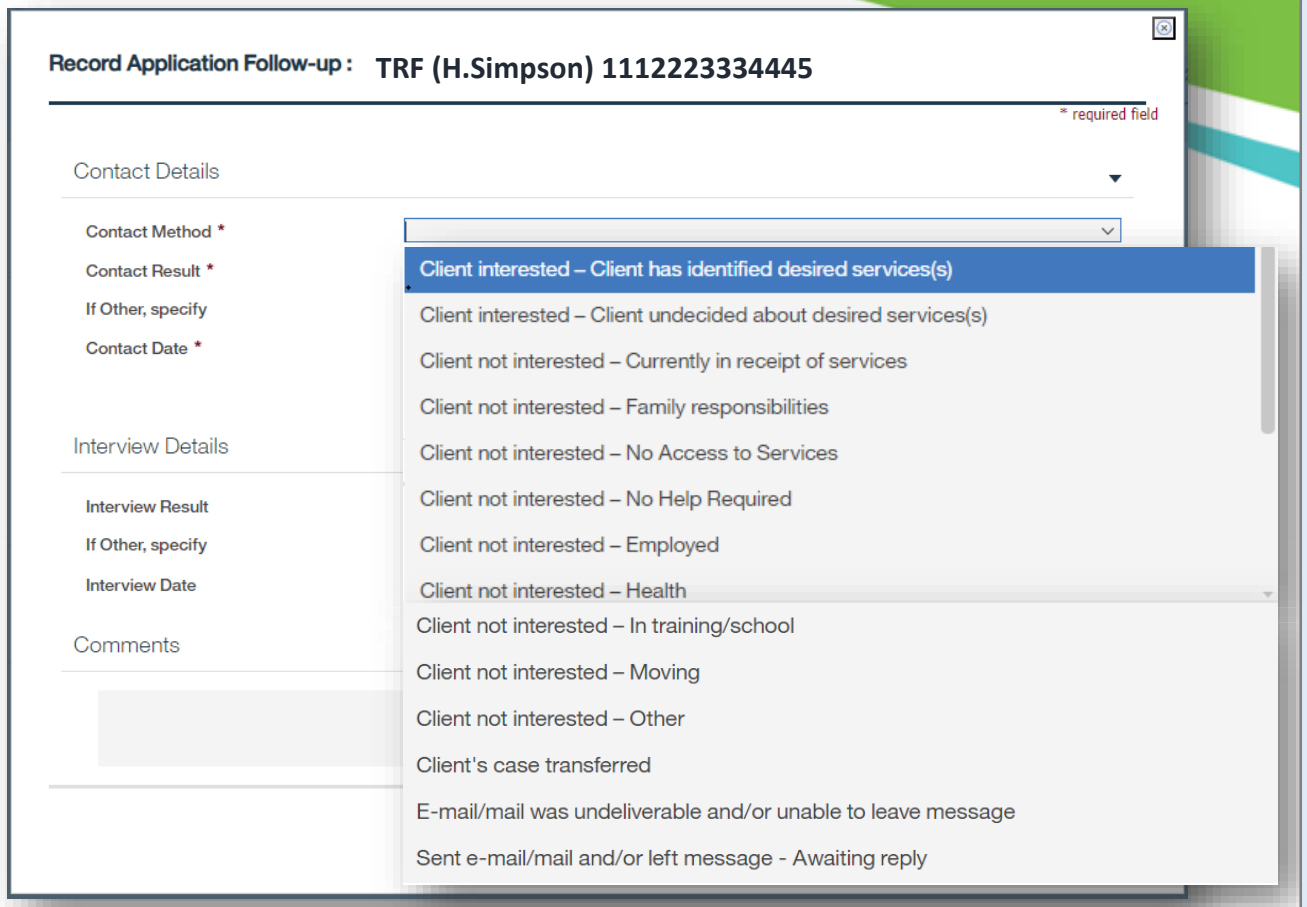
Note: Each time contact is made, record a follow-up



CONTACT DATE:

- Date will auto-populate to today's date
- Use date that contact was made with client

Record a Follow-up



NOTE: If other is selected, must complete "If Other, Specify field

CONTACT RESULT:

- Client interested – Client has identified desired services(s)
- Client interested – Client undecided about desired services(s)
- Client not interested – Currently in receipt of services
- Client not interested – Family responsibilities
- Client not interested – No Access to Services
- Client not interested – No Help Required
- Client not interested – Employed
- Client not interested – Health
- Client not interested – In training/school
- Client not interested – Moving
- Client not interested – Other
- Client's case transferred
- E-mail/mail was undeliverable and/or unable to leave message
- Sent e-mail/mail and/or left message - Awaiting reply

Record a Follow-up

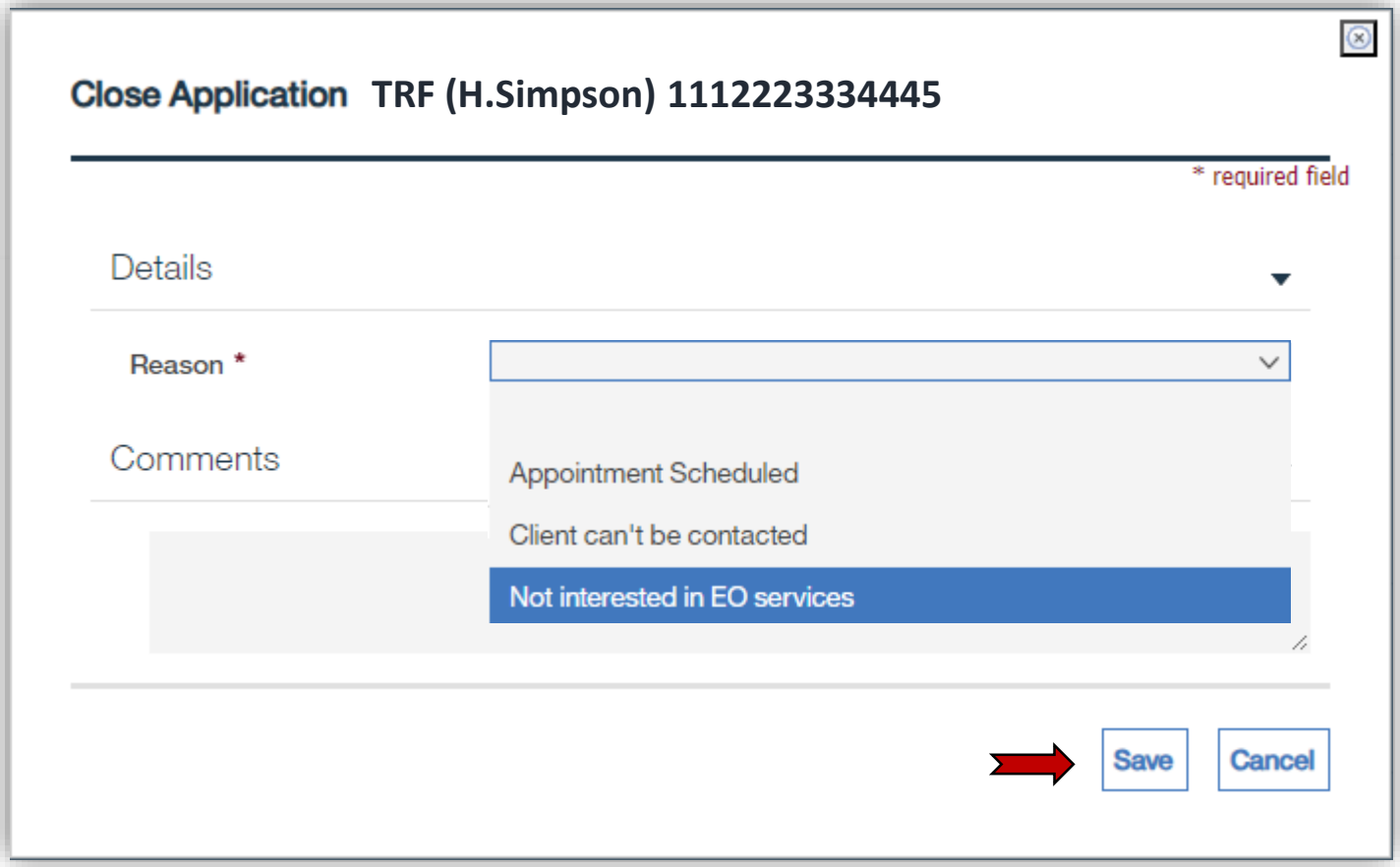
RECENT CHANGES

- Any time an action is completed in the TRF application you will be able to see the event changes with time stamps and creator under '**Recent Changes'** at the bottom of the clients TRF application home page
- No edits can be made to the event records once they have been saved.

Recent Changes

Event Type	Description	Date Time	Created By
Follow-up Added	Contact Date: 10/01/2024; Contact Method: E-mail; Contact Result: Sent e-mail/mail and/or left message - Awaiting reply; If Other, specify: ; Interview Date: ; Interview Result: ; If Other, specify: ; Comments:	10/01/2024 09:05	Nadine Phillip
Application Opened	Application was opened by Nadine Phillip	10/01/2024 09:05	Nadine Phillip

Close Application

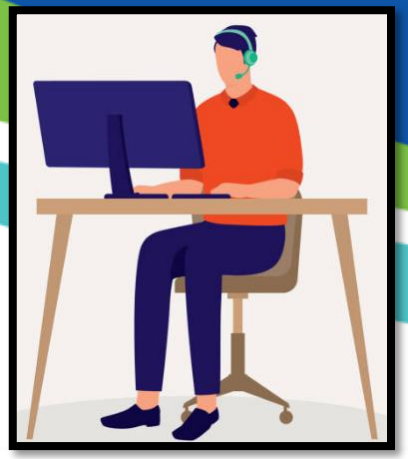


CLOSE APPLICATION OPTIONS:

- **Appointment Scheduled-** Intake appointment has been made with client
- **Client can't be Contacted-** must make **two** contact attempts before application is closed
- **Not interested in EO service-** must make **two** contact attempts before application is closed

Note: *If TRF is closed to "Client cant be contacted" or "Not interested in EO service", no further action is required.*

Intake and Assessment Phase



Appointment Scheduled

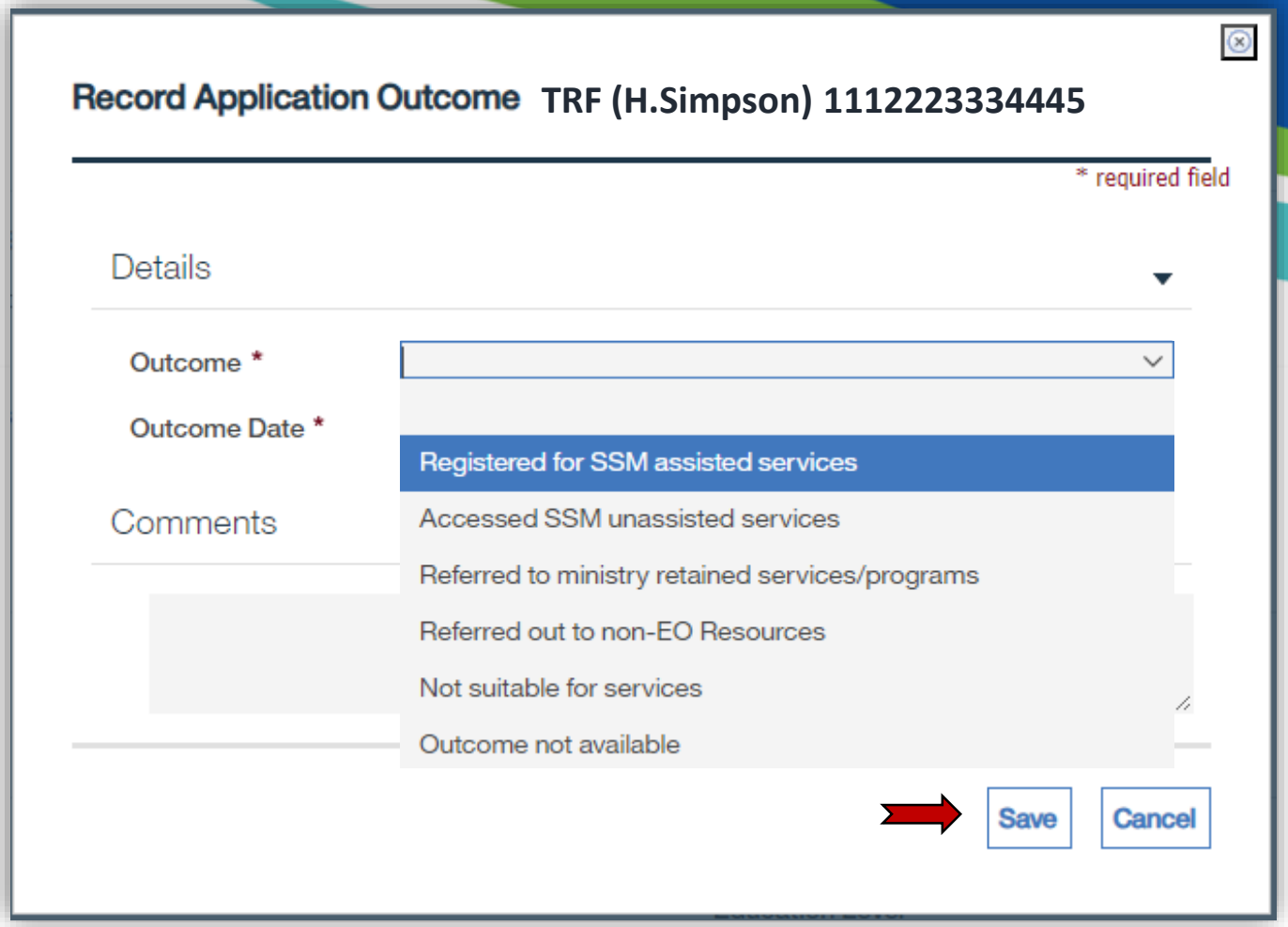
CA
Module 1
Module 2

Register In CaMs & Create EAP

Record Application Outcome

RECORD APPLICATION OUTCOME OPTIONS:

- Registered for SSM assisted services
- Accessed SSM unassisted service
- Referred to Ministry retained services/programs
- Referred out to non-EO Resources
- Not suitable for services
- Outcome not available- *this options automatically assigns when a TRF application is closed as "Client not interested"*



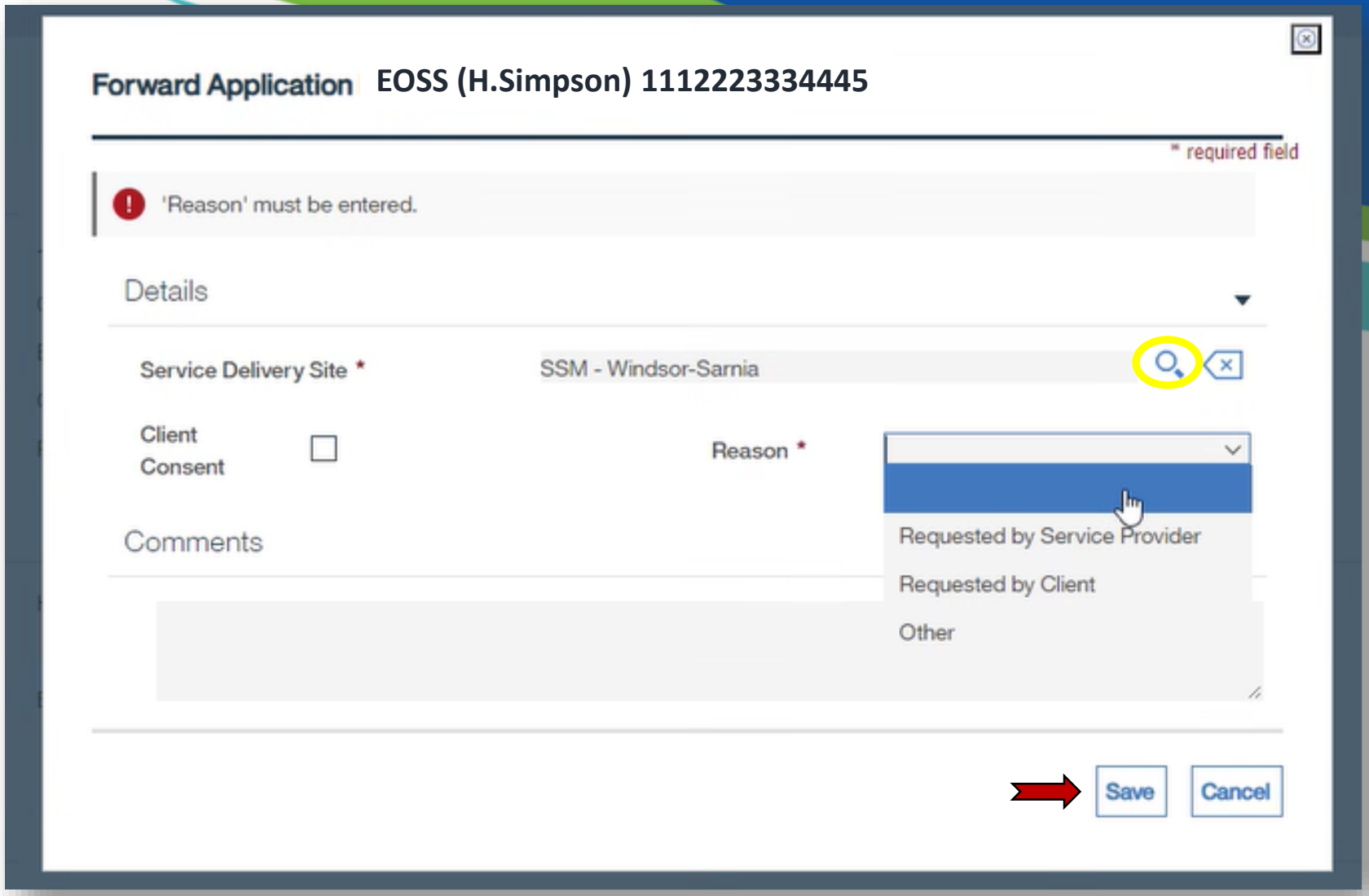
Forward Application

Forward TRF Application

- In the rare instance, it is determined that the client would better be suited at another agency or the client requested a different EO provider, the TRF would be forwarded back **ONLY** to the SSM.
- Use Magnify glass to search the **SSM**
- Select a **Reason**
- Check the box for "**Client's Consent**"

Forward Application Reasons:

- Requested by Service Provider
- Requested by Client
- Other



Q & A