

Targeted, Referral and Feedback (TRF)

Guide to Processing TRF Applications in CaMS

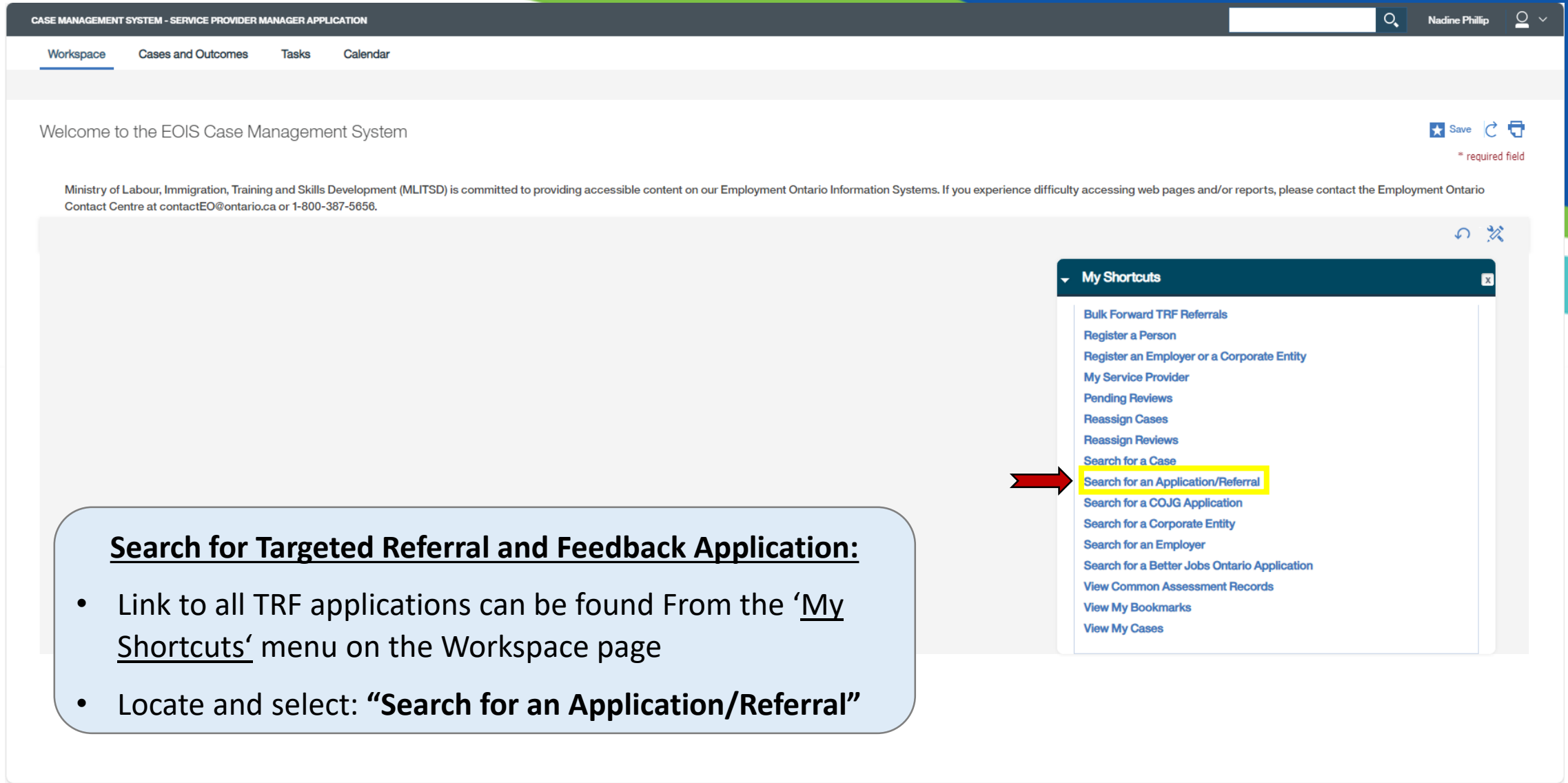


WINDSOR REGIONAL
Employment Network

Processing a TRF Application



Search for TRF Application



CASE MANAGEMENT SYSTEM - SERVICE PROVIDER MANAGER APPLICATION

Workspace Cases and Outcomes Tasks Calendar

Welcome to the EOIS Case Management System

Ministry of Labour, Immigration, Training and Skills Development (MLITSD) is committed to providing accessible content on our Employment Ontario Information Systems. If you experience difficulty accessing web pages and/or reports, please contact the Employment Ontario Contact Centre at contactEO@ontario.ca or 1-800-387-5656.

My Shortcuts

- Bulk Forward TRF Referrals
- Register a Person
- Register an Employer or a Corporate Entity
- My Service Provider
- Pending Reviews
- Reassign Cases
- Reassign Reviews
- Search for a Case
- Search for an Application/Referral**
- Search for a COJG Application
- Search for a Corporate Entity
- Search for an Employer
- Search for a Better Jobs Ontario Application
- View Common Assessment Records
- View My Bookmarks
- View My Cases

Search for Targeted Referral and Feedback Application:

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

Search for TRF Application

CASE MANAGEMENT SYSTEM - SERVICE PROVIDER MANAGER APPLICATION

Workspace Cases and Outcomes Tasks Calendar

Application/Referral Search

Application/Referral Search

Search Criteria

You can search using the Application Number or a combination of other search criteria.

Application Number	<input type="text"/>	First Name	<input type="text"/>
Last Name	<input type="text"/>	Status	<input type="text"/>
Business Name	<input type="text"/>	Submitted Date To	<input type="text"/>
Service	<input type="text"/>	Application Owner	<input type="text"/>
Submitted Date From	<input type="text"/>	Application Type	<input type="text"/>
Client Type	<input type="text"/>	City	<input type="text"/>
Service Delivery Site	<input type="text"/>	Postal Code	<input type="text"/>
Catchment Area	<input type="text"/>		

Search Results (Number of Items: 34 out of 34)

Application Number	Last Name	Business Name	Date Submitted	Service Delivery Site	Service	Status	Application Type	City	Postal Code	Follow-ups
1112223334445	Simpson		10/01/2024	City of Windsor-IES		Forwarded	TRF	Windsor	N9A4K6	2
5444333222111	Shrute		21/12/2023	Goodwill Career Center-IES		Open	TRF	Chatham	N7M 2T4	1
1234567891235	Griswold		27/01/2023	County of Lambton-IES		In-Progress	TRF	Sarnia	N6L 3h0	2

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

CASE MANAGEMENT SYSTEM - SERVICE PROVIDER MANAGER APPLICATION

Workspace **Cases and Outcomes** Tasks Calendar

Application/Referral Search X

Application/Referral Search

Search Criteria

You can search using the Application Number or a combination of other search criteria.

Application Number

Last Name

Business Name

Service

Submitted Date From

Client Type

Service Delivery Site

Catchment Area

First Name

Status

Submitted Date To

Application Owner

Application Type

City

Postal Code

Note: When Service Providers receive a TRF application, they will see the number of follow-ups completed by the SSM under the Follow-ups column in the search results. Service Providers would still be required to complete 2 additional contact attempts with the client.

Search Results (Number of Items: 34 out of 34)

Application Number	Last Name	Business Name	Date Submitted	Service Delivery Site	Service	Status	Application Type	City	Postal Code	Follow-ups
1112223334445	Simpson		10/01/2024	City of Windsor-IES		Forwarded	TRF	Windsor	N9A4K6	2
5444333222111	Jackson		21/12/2023	City of Windsor-IES		Forwarded	TRF	Windsor	N9A4K6	2

Contact and Record a Follow-up

Workspace **Cases and Outcomes** Tasks Calendar

Application/Referral Search X TRF (H.Simpson) 1112223334445 X

Homer Simpson-1112223334445

Application Number	1112223334445	Date Submitted	27/12/2023
First Name	Homer	Last Name	Simpson

Application Home

Application Details

Application Number	1112223334445	Owner	Change Owner
Service Delivery Site	SSM - Windsor-Sarnia	Client Type	I am an Individual
Service		Outcome	
Status	In Progress	Date Submitted	27/12/2023
Application Type	TRF	Date Visible	10/01/2024

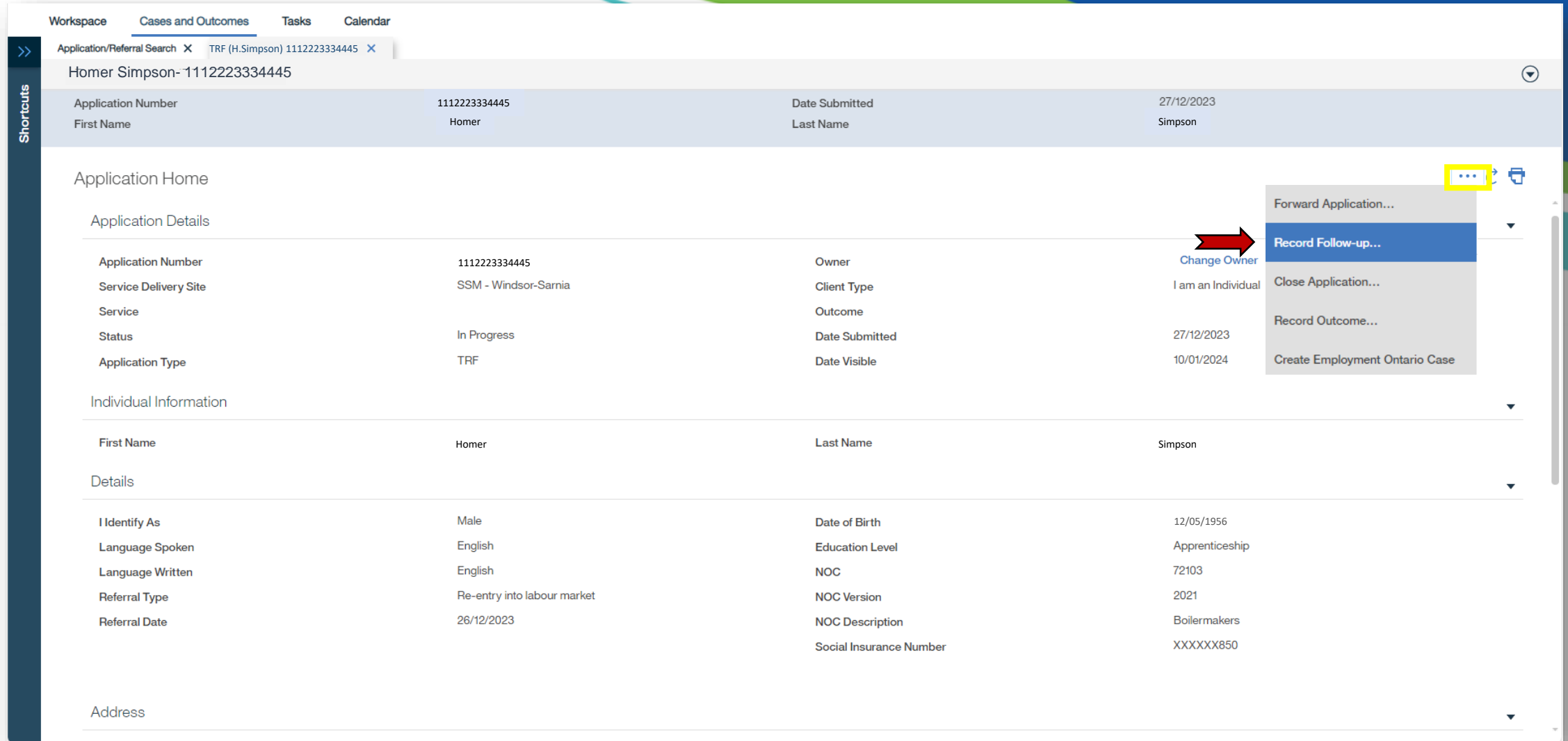
Individual Information

First Name	Homer	Last Name	Simpson
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Details

I Identify As	Male	Date of Birth	12/05/1956
Language Spoken	English	Education Level	Apprenticeship
Language Written	English	NOC	72103
Referral Type	Re-entry into labour market	NOC Version	2021
Referral Date	26/12/2023	NOC Description	Boilermakers
		Social Insurance Number	XXXXXX850

Address



Record a Follow-up

Record Application Follow-up : TRF (H.Simpson) 1112223334445

* required field

Contact Details

Contact Method *


Contact Result *

If Other, specify

Contact Date *

Interview Details

Interview Result



CONTACT METHOD OPTIONS:

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

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

Contact Details

Contact Method *

Contact Result *

If Other, specify

Contact Date * 10/01/2024

CONTACT DATE:

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

Record a Follow-up

Record Application Follow-up: TRF (H.Simpson) 1112223334445

Contact Details

Contact Method *

Contact Result *

If Other, specify

Contact Date *

Interview Details

Interview Result

If Other, specify

Interview Date

Comments

- 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

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

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

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 TRF (H.Simpson) 1112223334445


* required field

Details ▼

Reason *

Comments

- Appointment Scheduled
- Client can't be contacted
- Not interested in EO services**

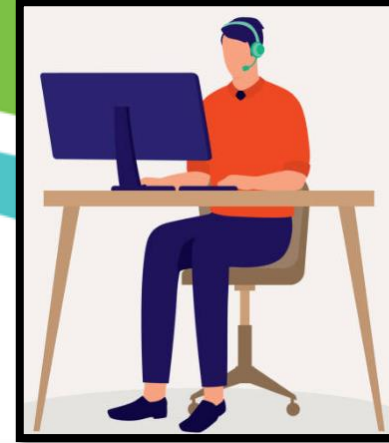


CLOSE APPLICATION OPTIONS:

- **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

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

Forward Application EOSS (H.Simpson) 1112223334445

* required field

! 'Reason' must be entered.

Details

Service Delivery Site * SSM - Windsor-Sarnia

Client Consent Reason *

Comments

Requested by Service Provider
Requested by Client
Other

Save Cancel



Q & A