WINDSOR REGIONAL Employment Network Windsor-Essex · Chatham-Kent · Sarnia-Lambton

Job Aid: Targeted, Referral and Feedback System (TRF) in CaMS

Actions	Steps
1. Search for a TRF	*Note: When searching for a TRF, please be careful not to click on applications that are not within your organization/catchment area; clicking on an 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.
2. Contact Client	***Contact Attempts:*** *Note: First contact attempt must be made within 2 business days of receiving an application. Second contact attempt must be made within 10 days of receiving an application.* ***Two contact attempts must be made either by phone, email, or letter and follow-ups recorded for each, as outlined below in next section (Record Follow-Up) before a TRF application can be closed.*** 1. Locate client's contact information (phone, email address etc.) from Application Home Page. 2. Proceed to call, email or mail letter to client.
3. 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"**.

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<td>*Forward Application*

(Return to WREN if applicable)</td>
<td>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 WREN.

1. From the <u>Application Home Page</u>, click the Action Button at the top right (…) and select Forward Application.
2. The <u>Forward Application</u> 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. Check off box beside “<u>Client Consent</u>”.
6. Select a Reason from the drop down list.
7. Click “Save”.</td>
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<td>4. Close Referrals</td>
<td>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 <u>Application Home Page</u>, click the Action Button at the top right (…) and select “Close Application”.
2. Select the Closure Reason from the dropdown list and click “Save”.</td>
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<td colspan="2">Note: Before proceeding to complete a Common Assessment and creating an EAP, caseworkers must conduct a search in CaMS to determine if client is known or unknown to CaMS. This step is critical as it will dictate the correct process to register the client; i.e. whether or not the client needs to be manually registered in CaMS (as outlined below).</td>
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<td>5. Complete Intake Appointment</td>
<td>Note: If client fails to attend appointment, Record Application Outcome as “Outcome Not Available”.

• <u>Client Known to CaMS:</u>

1. Follow business protocols to complete an Intake with the client.
2. Complete Common Assessment (Module 1 and Module 2).
3. Submit Common Assessment.

• <u>Client NOT known to CaMS</u>

1. Follow business protocols to complete an Intake with the client.
2. Complete Common Assessment (Module 1 and Module 2) and click “Save and resume later” (DO NOT SUBMIT AT THIS TIME).

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6. Record Outcome (TRF Application)	• Same for clients known or **NOT** known to CaMS *Note: An Outcome can be recorded once a TRF 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".
7. Create an Employment Ontario Case	• Client **NOT** known to CaMS *Note: An outcome must be assigned to the TRF referral before an Employment Ontario case can be created.* 1. After recording an outcome, return to the Application Home Page, click the **Action Button** at the top right (**…**) and select "**Create Employment Ontario Case**". 2. Use the search feature to see if the client is already in EOIS-CaMS. If a match appears, follow the normal process; if no match, select "**Continue"**. 3. Some information will pre-populate from the TRF referral record. Enter the remaining of the information. 4. Select "**Register**". 5. Continue to the Employment Ontario homepage to proceed with the registration process.
8. Submit Common Assessment	• Client **NOT** known to CaMS 1. Log into the Common Assessment (CA) Tool and submit the client's CA that was previously saved.
9. Create an Employment Action Plan (EAP)	• Client **NOT** known to CaMS 1. Log into CaMS, follow steps to create an Employment Action Plan. 2. When creating an EAP, the referred in field will be defaulted to "**Targeted Referral and Feedback".** 3. Select "**No**" from the drop-down menu for Self-Service Initiated. • Client Known to CaMS: 1. Log into CaMS, follow steps to create an Employment Action Plan. 2. When creating an EAP, the Service provider will need to manually select "**Targeted Referral and Feedback**" in the Referred In field. 3. Select "**No**" in the Self-Service Initiated field.