Alberta Government

Targeting, Referral, and Feedback (TRF)

Quick Reference Guide

- Portal User Guide
- Generic script for calling referrals
- Outreach letter/email templates
- Email best practices
- LMTA Promo Guidelines
- Feedback Guide

Jobs, Economy and Trade

TRF Portal User Guide

Portfolio: Employer and Program Services

Program: Labour Market Agreements and Analytics

Project: Targeting, Referral & Feedback (TRF)

Revision History

Version	Date	Author	Description of change
1.0	2017-12-08	Chad Weitzel	Initial Draft
1.1	2019-02-15	Jennifer Barnetson	Updated to reflect changes in Release 1.3
1.2	2019-08-28	Jennifer Barnetson	Updated for MADI-B-B migration
1.3	2024-04-24	Miranda Watson	Update MADI-B Migration to Alberta.ca Account for Organizations, Changes to letter and email templates

Table of Contents

Section 1: Introduction

This document will outline all of the tasks that TRF users will perform within the external portal. Each task described in this document will identify an objective with a desired outcome, and identify which role (or roles) are involved, and the high-level steps that need to occur in order to achieve the objective.

Environments & Login

The TRF Portal is one of two components: an external-facing portal for use by contracted service providers and an internal CRM (Customer Relationship Management) based solution used by GOA staff.

Portal

Task: Access the TRF portal component.

Role(s) Performing Task: TRF Administrator, Service Provider Supervisor, Service Provider Staff

Steps

Important! Before you can access the portal, you first must have both created an Alberta.ca Account for Organizations-and have been added as a portal user by an Administrator in the CRM component.

For TRF Administrators, they will also need a Alberta.ca Account For Organizations account tied to a portal user. You **will not** be able to log in to the portal using your CRM (GOA) credentials.

1. Navigate your browser to https://trf.labour.alberta.ca
2. You should be automatically redirected to the Alberta.ca Account For Organizations service login page. If not, click the **Sign In** button on the top right. This will navigate you to the login page.
3. Enter your Alberta.ca Account For Organizations user name
4. Enter your password
   Note: This will navigate you back to the TRF Portal

ALBERTA.CA ACCOUNT FOR ORGANIZATIONS

User authentication for the TRF portal is handled by Alberta.ca Account For Organizations which allows your business to be identified by government online and to access participating government services without paper documents or face-to-face visits, while protecting your information and privacy.

Creation of a Alberta.ca Account For Organizations account is a one-time event.

Task: Create an Alberta.ca for Organizationsaccount.

Role(s) Performing Task: TRF Administrator, Service Provider Supervisor, Service Provider Staff

Steps

Part One: Creating a Alberta.ca Account for Organizations Account

1. Navigate your browser to: https://www.alberta.ca/alberta-ca-account-for-organizations
2. Follow the instructions on the site to complete registration or to access user support materials for assistance

Part Two: Connecting Your Alberta.ca Account for Organizations Account to TRF

Once your Alberta.ca Account for Organizationsaccount is created, it must be linked to a user profile (contact) within the TRF CRM system. The TRF profile is created by an administrator and an invitation link is sent to the user via the email address that they used to create their Alberta.ca Account for Organizations account. This may not happen immediately and requires that a Service Provider Supervisor (or other authority) has provided your information to TRF Administrtors at Alberta Jobs, Economy and Trade.

The address sending the invitation will be: TRF-SYS.S@gov.ab.ca. This address is a system account and isn't monitored, so do not reply to it.

3. Open the TRF Portal Invitation Email
   Note: This email should arrive in the email box for the address you provided as your Alberta.ca Account for Organizations email address.

4. Click the **invitation link** in the body of the email
   Note: This will navigate you to the TRF Portal Redeem Invitation page.

5. Click the **register** button

6. Click the **Alberta.ca** button
   Note: This will navigate you to the Alberta.ca Account for Organizations service login page

7. Enter your Alberta.ca Account for Organizations username and password

8. Click **login**
   Note: This will navigate you back to the TRF Portal

9. Once you log in, the TRF Portal will finalize the linkage between your profile in TRF and your Alberta.ca Account for Organizations account and you will be able to begin using the TRF Portal.

Email Notifications

Certain events in the TRF system will trigger emails to be sent to users. These emails will go to the primary email address assigned to that user so make sure that you provide a valid (and active) email address as part of their contact information so they can receive emails!

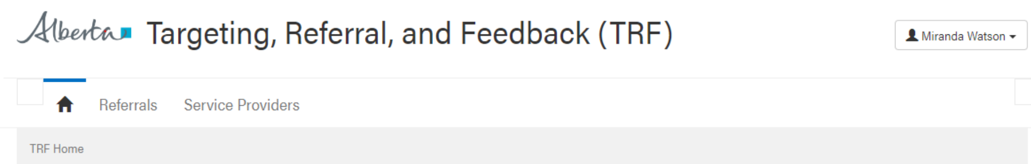
Any automatically generated email notifications will come from the address: TRF-SYS.S@gov.ab.ca.

Section 2: General Layout, Navigation, and Functions

Portal Page Header

At the top of each page there is a dark blue and grey bar that acts as the primary navigation for the portal.

At any time you can click on the top-left Alberta Government logo to return to your default dashboard.



User Management

When logged in, portal users can access two functions from the icon on the top right of the page: “Sign Out” and “Profile”.

Sign Out

This is straightforward and will log the user out of the portal.

Profile

Clicking the profile link will take the user to the Alberta.ca Account for Organizations website where they will be able to update their account information.

Important Note: There isn’t a direct link back to the TRF Portal from the Alberta.ca Account for Organizations Profile screen. The user will need to return using a bookmark or other external link.

Main Navigation

The portal is comprised of two main parts: referrals and the service providers (and associated contracts) that manage them.

Referrals

Clicking the **Referrals** link will bring you back to the dashboard.

Service Providers

Clicking the **Service Providers** link will display a list of Service Providers to select from. In most cases a user will be assigned to a single provider and will be automatically forwarded to the details screen for that provider.

In the case of TRF Administrators, a specific provider will need to be clicked before the details can be shown.

Reports

When viewing a Service Provider or Contract record, a third menu item appears providing access to reports. More details about reports can be found in the Reports section below.

Breadcrumb

Below the main navigation is the breadcrumb, which shows the user where they are in the portal. Clicking any of the hyperlinked text in the breadcrumb will navigate them to that section of the portal.

Views

Similar to the views in the CRM Component, the TRF Portal displays lists of records in a table format. Some of the data in the view is hyperlinked and will navigate the user to the record if the link is clicked. Some columns are sortable and are indicated by blue hyperlinked text.

The portal component **does not** allow the creation of custom views.

Dashboard

Once logged in to the portal, the first screen presented to the user will be the dashboard. The dashboard contains a list of referrals that are assigned to the contract or contracts that the user belongs to.

The dashboard view is searchable via the search field at the top of the view and will search for text entered into the box. Clearing the box will clear any filtering applied by the search box.

Section 3: Tasks

Service Provider Management

Create a Targeting Criteria Change Request

Task: Create a draft request to change the targeting criteria for a contract.

Role(s) Performing Task: Service Provider Supervisor

Steps

1. Using the top navigation bar, navigate to **Service Providers**
2. In the Relationships section under Contracts, click the contract you want create a Targeting Criteria Change Request for
3. In the Targeting Criteria Requests section, click **+ Create**
4. Enter a name for your criteria set in the Criteria Set Name box, click **Save.**
5. Click on the **header text** (or blue >) of the category of criteria you wish to include in the criteria set
6. Click the **use this criteria** checkbox
   Note: A criteria must have this box checked for the criteria to be included. Unchecking this box will remove any qualifier or value selections (see below).
7. Select a **qualifier** for the criteria
8. Select a **value** for the criteria
   Note: The values available for a criteria are dependent upon the qualifier being used. For example, selecting "Equal to" will allow only a single value to be selected while selecting "Included in list" will allow multiple values.
9. Repeat steps 5-8 for each additional criteria you wish to include
10. Click **save** at the bottom of the form to save the request as a draft
11. Click the **submit** button at the bottom of the form. This will send your Targeting Criteria to your Contract Services Coordinator for review.

You must have at least one criteria included to be able to save a draft request.

Submit a Targeting Criteria Change Request

Task: Submit a draft request to your Contract Service Coordinator.

Role(s) Performing Task: Service Provider Supervisor

Steps

1. Using the top navigation bar, navigate to **Service Providers**

2. In the Relationships section under Contracts, click the contract you want to submit a Targeting Criteria Change Request for
3. In the Targeting Criteria Requests section, click a Targeting Request that has a **Request Status** of "Draft"
4. Review the selected criteria to ensure the request has all the selections that you require
5. Click the **submit** button at the bottom of the form

Important Note: A contract can have multiple Targeting Criteria Sets active. However, this is only advisable for situations where one criteria set has multiple filters that you do not want to apply to all. For example, one occupation with age or education parameters that differ from the other occupations being targeted.

Suspend Referrals

Task: Request that a contract receive no additional referrals.

Role(s) Performing Task: Service Provider Supervisor

Steps

1. Using the top navigation bar, navigate to **Service Providers**
2. In the Relationships section under Contracts, click the contract you want to request a suspension of referrals for
3. In the Targeting Criteria Requests section, click **the Request ID number** of the Targeting Criteria you would like to suspend. This will take you to the Targeting Referral Change Request form.
4. Scroll to the bottom of the Targeting Referral Change Request form page, click **Suspend**.
5. When asked if you are sure if you want to suspend this target criteria request, click **Yes.**

Important Note: Suspending the targeting criteria filter set will leave this criteria set in your list of request which will make it easier to reactivate later. Only use the **Delete Criteria Set** button for permanent deletions.

Working with Referrals

Search for a Referral (Dashboard)

Task: Search for a specific referral record using the dashboard.

Role(s) Performing Task: Service Provider Supervisor, Service Provider Staff

Steps

1. Navigate to the **dashboard**
2. In the search box, type the text relating to the record you are looking for
   Note: This text can be in any column in the view (e.g. First Name, NOC, or Referral Status). If you want to search for text that is in the middle of a name or word, start by typing the wildcard character (*).
3. Press the **enter** key or click the **magnifying glass** icon

4. Click the hyperlinked **referral ID** in the first column (e.g. Referral-000123). This will navigate you to the referral record.

Edit Referral Data

As a Service Provider Supervisor or Staff member, you are able to update some of a referral's information. Specifically, their name and address information. All other fields remain locked and are to be used as they were provided by the ESDC.

Task: Update a referred applicant's name and/or address.

Role(s) Performing Task: Service Provider Supervisor, Service Provider Staff

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Steps

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1. Navigate to a referral record
2. Change any of the following field's data: First Name, Last Name, Address, Post Box, Municipality, Postal Code, or Phone Number.
3. Click the **Save** button at the bottom of the form

Note: If you provide new information to a field that was previously blank, you may receive an error message. The ability to change a record is only temporary, for the purpose of having current information to contact the individual through TRF. An update to this record is not returned to ESDC and does not update any information the individual provided on their EI application.

Create Referral Activity Record

Activity records track interactions between a Service Provider and a referral. Creating a referral's first activity record will move the status of the referral from "Not Started" to "In Progress".

Task: Create a record of interaction between the Service Provider and a referred applicant.

Role(s) Performing Task: Service Provider Supervisor, Service Provider Staff

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Steps

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1. Navigate to a referral record
2. Under the <u>Activities</u> section, click the **+ Create** button
3. If the activity occurred on a day other than the current day, change the value in the <u>Activity Date</u> field
4. If the activity was performed by someone other than the current user, change the value of the <u>Contacted By</u> field
5. Select a result from the <u>Result</u> field
6. Select a method from the <u>Method</u> field
7. Click the **Save** button

Important Note: Be sure the activity information is correct, as you will not be able to change it later.

Complete Referral

A referral can be marked as complete once at least one activity record has been logged. However, certain activity results require follow up and will not allow a referral to be completed. When it is your last interaction, for example, you have selected the feedback "Employed – Returning to former job", remember to complete the referral.

Task: Mark a referral as completed.

Role(s) Performing Task: Service Provider Supervisor, Service Provider Staff

Steps

1. Navigate to a referral record
2. Click the **Complete** button at the bottom of the form

Important Note: Completing a referral will remove it from the portal.

Reporting

The portal component of TRF has several summary reports that are accessible from one of two screens: from the Service Provider screen or from the Contract screen. Where you run a report from will determine what parameters will automatically be passed to the report.

These reports are:

- Referral count by Age
- Referral count by Gender
- Referral count by NOC
- Referral count by Status
- Referral count by Service Provider Feedback
- Referral count by ESDC Feedback

Important Note: All reports are driven by Referral Date dating back to December 2017. Reports for Referral by Age, Gender, NOC and Status include all statuses (Not Started, In Progress, and Complete). Reports for Referral by Service Provider Feedback and ESDC Feedback include only referrals with a status of Complete. All reports contain aggregate counts only are in **.xlsx** format and can be freely saved to your local computer.

Reports by Service Provider

Task: Run a predefined report at the Service Provider (organization) level.

Role(s) Performing Task: Service Provider Supervisor

Steps

1. Navigate to the **Service Provider** page

2. From the main menu, click **Reports**
3. From the report list that appears, click the report you wish to run
4. Open the generated report

Important Note: Depending on your browser, the method you use to open the file will be different.

Reports by Contract

Task: Run a predefined report at the Contract level.

Role(s) Performing Task: Service Provider Supervisor

Steps

1. Navigate to a **Contract** page
2. From the main menu, click **Reports**
3. From the report list that appears, click the report you wish to run
4. Open the generated report

Important Note: Depending on your browser, the method you use to open the file will be different.

Proposed script when calling TRF referrals

If they answer…

Hello, my name is____________________. I am calling from the <name of organization> in <state your location>. Is **<insert name of referred person>** home?

Hi, I'm phoning to offer you assistance finding a new job. You may have noticed at the end of your Employment Insurance application, it said that you may be referred to a service provider contracted by the Government of Alberta. Service Canada and the Government of Alberta are working together to help get Albertans connected to available jobs. Our agency targets specific occupations we know are in demand and your EI application matched one of those targets. We have links with employers looking for your skills and we'd like to help you get back to work. Would you be interested in coming to our Centre to learn more about the programs and services we offer?

If they are interested in visiting…

- Book an appointment as per your usual protocol or invite the individual to a group information session
- Provide information on parking or bus routes
- Offer to send an email confirming the time and place (see email templates)

If they are NOT interested…

- Ask if they would be interested in receiving a one-time email about self-directed services (see email templates) and
- Advise that they may be contacted again later in their claim to follow up on services available to them if they still have not found employment

If the call goes to voice mail…

Hello, my name is____________________. I am calling from <name of organization> located in ____________. Someone in your household has recently applied for Employment Insurance and their contact information was shared with us to inform them of programs and services available for EI applicants that will help them return to work.

Please call us back at your earliest convenience to set up an appointment with one of our counsellors. We have connections to employers who are looking for your skills.

Our phone number is ____________________. Our offices are open from Monday – Friday from 8:30-4:30, closed on weekends. Once again, our phone number is ____________________.

Frequently Asked Questions (Client Perspective)

How was my information obtained?

- The information you entered during your online EI application (using Appli-Web) is used to determine eligibility for EI as well as for employment services and training to help you get back to work. As part of this, Service Canada has shared your contact information with the Alberta government and its authorized service providers. This is stated in the Privacy Notice Statement at the start of the EI application and again at the end of the application (see below).

  > *Thank you for submitting your application for Employment Insurance.*
  >
  > *To help you return to work, we may refer you to a service provider contracted by the Government of Alberta. We will inform them of your application for EI benefits and provide them with your contact information. This is to enable the service provider in your community to contact you directly with information about their programs and services, and to report back to Employment and Social Development Canada about your interactions with them and your use of their services.*
  >
  > *Accessing these services could be one of the ways you demonstrate to Service Canada your efforts to meet the eligibility criteria to receive EI benefits.*

Why are you reaching out to me?

- The purpose of this outreach is to provide information about available training programs and/or services that might be beneficial in your efforts to return to work.

How was I identified?

- Alberta uses an application called Targeting, Referral and Feedback. Using this application, we are able to select specific characteristics that employers are looking for and share this information with Service Canada. When individuals apply for EI, through Service Canada's online application Appliweb, and their information matches these characteristics, their contact information is sent to us.
- In your case, we are working with a number of employers looking to hire **<insert occupation>** which was what you listed as your most recent occupation when you applied for Employment Insurance. Since your characteristics matched our selection criteria your contact information was sent to us.

What happens if I accept the offer of service?

- We will invite you to come in and meet with our staff. They will ask you about your career goal and help you identify the services you might need to reach your goal. For example, we might help you write a resumé, practice your interview skills and help you find local employers looking for workers with your skills. Or, we might refer you to a short course, place you with an employer and visit you at the worksite to offer job coaching support. If you require further training to reach your goal, we may refer you to another service provider.

What happens if I do not accept the offer of service?

- We are sorry you are not interested in our programs. We will make a note on your profile. This will also be shared with Employment and Social Development Canada (ESDC), indicating you are confident in seeking employment on you own.
- There are other resources available to assist you. Please feel free to check out the Career Information Hotline, Alberta Learning Information Service, Training for Work Programs and the

Employment and Training Services Directory. If you would like, I can email you links to these resources at <confirm their email address on file>.

What will ESDC/Service Canada do with the information that I have indicated that I'm not interested in your program?

- When you applied for Employment Insurance, you agreed to actively seek employment. Saying yes to an offer of service like this is one way for you to demonstrate that you are actively looking for work. Service Canada may contact you to ensure you are engaged in a job search. If you are confident in seeking employment on your own, without support from any organization, I would suggest that you keep records of your job search activities, for example, a list of all the places to which you have applied/sent a resume.
- If you do encounter obstacles to finding a new job and decide later that you would like to use our services, I would encourage you to call back.

What other programs and services are available?

If you would like, I would be happy to send you a one-time email with more information about our programs and services as well as information on the Career Information Hotline, the Alberta Learning Information Service website and the Canada-Alberta Job Bank. (See email template)

I have questions about my EI, can you help me?

- For questions about your Employment Insurance benefits please call Service Canada at 1-800-206-7218, TTY: 1-800-529-3742

Email templates

When confirming with the individual that you will be sending an email:

- Confirm their email address
- Indicate when they can expect to receive an email from you
- Confirm that the email will be coming from an email address from your organization

Sample text for follow-up email when an individual is interested in services:

Subject: Confirming your appointment at – <insert organization name and location>

Hello **<insert name>**:

We recently spoke about the programs and services <insert organization name> offers unemployed Albertans to help them find new jobs.

I'm happy to confirm your appointment with **<insert counsellor name>** at our ________________ location.

- Include date, time, address and applicable parking/transit instructions.

If you are unable to keep this appointment, please call us at_________________ to reschedule or cancel.

Below, are some other resources that may help you in your job search:

- Alberta Learning Information Service
- Training for Work Programs
- Employment and Training Services Directory Employment
- Alberta and Regional Job Banks

Sincerely,

<Auto signature>

*Sample text for follow-up email when an individual is **NOT** interested in receiving services:*

Subject: Help with your job search

Hello **<insert name>**:

We recently spoke about the programs and services our organization offers unemployed Albertans to help them find new jobs. **<insert specific program language here>**

If you change your mind about accessing our services, please feel free to call us at **<insert phone number for your location>.**

In addition, here are some other resources that may help you in your job search:

- Alberta Learning Information Service
- Training for Work Programs
- Employment and Training Services Directory Employment
- Alberta and Regional Job Banks

Sincerely,

<Auto signature>

Email template 1: Changing Standards Style

Subject line: [First name], the job market is changing

Hello [first name],

You have received this email because you recently applied for Employment Insurance (EI) with Service Canada.

What employers are looking for is changing. Don't get left behind. At [provider name], we help give you an edge in this competitive job market.

We are experts that provide:

- connections with employers;
- free, personalized services, [like career counselling];
- valuable opportunities, [like training]; and
- phone, online or in-person services.

[Call XXX-XXXX] to book your first meeting today.

In the meantime, here are some resources that may be helpful in your job search:

- Training and Employment Services Directory
- Alberta Learning Information Service
- Alberta and Regional Job Banks

Working in partnership with:

Canada Alberta

[signature block, preferably from a named individual]

Email Template 2: Checklist Style

Subject: [name], you're one step away from valuable job resources!

Hello [name],

You have received this email because you recently applied for Employment Insurance (EI) with Service Canada.

Thank you for taking this first step. I recognize this may be a difficult time for you.

I wanted to let you know about [provider name], a government-funded service that may also be helpful. We're here to assist – whether you want to improve your skills, explore career options, or find a job when the time is right.

Take one final step to access job training and direct links to employers.

✓ 1. Applied to federal benefits

✓ 2. Opened this email

3. Call 555-5555 to contact [name]. A team member will be in touch soon.

Why use [contractor name]?

- Connections with employers.
- Free, personalized services, [like career counselling].
- Valuable opportunities, like [training].
- Phone, online or in-person services.

Working in partnership with:

[signature block, preferably from a named individual]

<Your Letterhead Here>

Date

<First Name Last name>

<Mailing Address>

Dear <First Name Last Name>,

You have received this letter because you recently applied for Employment Insurance (EI) with Service Canada. As part of your application, your contact information was shared with the Government of Alberta and its authorized service providers to inform you of programs and services to help you get back to work.

As an authorized service provider, our qualified staff at <insert organization name here> will assess your needs and help you develop a return to work plan. To learn more about the programs and services that we can offer you, please call us at 777-777-7777. We are open Monday – Friday from 8:30 a.m. to 4:30 p.m., closed on weekends.

We recognize that you live a fair distance away from our office. We still encourage you to give us a call, or you can visit the Government of Alberta's website **alberta.ca/ETSdirectory** to learn about other employment and training programs that are delivered by agencies in communities across the province.

We look forward to hearing from you soon and assisting you in getting back to work.

Regards,

<Staff member name>
<Staff member title>
<Address, phone and email>

Email Best Practices

Two templates are recommended and included in this guide. If you choose to customize, keep some of the following practices in mind:

1. **Subject lines should be short, attract attention** (e.g., by asking a question or seeming 'important'), and entice recipients to open the email (e.g., by suggesting that the content will benefit them). However, it's a challenging line to walk because if the subject line appears to be spam, it will backfire. The name of the sender is an important signal of legitimacy.
2. Do not use all caps or add an exclamation mark as this might send it to a junk mail inbox.
3. **Service providers should personalize TRF outreach as much as possible by including the first name of the recipient and sender, and tailoring content to the jobseeker** (e.g., providing the location of a local office or industry-relevant information) Please do not send group emails via Bcc. A client is more likely to open an email that is personalized.
4. Include your email signature with your contact information at the end of the email.
5. Add the Government of Alberta and the Government of Canada logos to the email.
6. Customizing is allowed. For example, you can add a sentence about your online application form and include a link to it.
7. Proofread your email. If you are customizing, ensure that you send a copy to a colleague or to your supervisor to proof and ensure that the email has no grammar errors and/or that all links work.
8. Create an internal policy for how to handle reply emails from clients.
9. If you receive a bounce-back email from a client, the expectation is that you follow-up with a letter or phone call.
10. Do not include any attachments in your email (i.e. a form).

Tips:

Jobseekers tend to particularly value[1]:

- Connecting with local employers (e.g., at job fairs and placement programs);
- Finding out about jobs that may not be widely posted;
- Services that help them improve their skills;

[1] Behavioural Insights Final Report: Applying Behavioural Insights to Labour Market Challenges, p.53

- Receiving financial support for the job search (e.g., for work clothes and transportation to interviews); and,
- Obtaining financial support for attending training programs or school.

Promotional guidelines

This guide is designed to assist service providers contracted by the Government of Alberta to appropriately and consistently acknowledge all public information materials produced for programs, projects and services that are funded through the Canada-Alberta partnership.

Public information materials include advertising, marketing and/or promotional materials, which can be print or online.

AD considerations:

Speak to your audience

Use the following principles to get your ad to work. Please note the mandatory elements to be placed in all publications.

Clear message
Pick a single message and keep it simple and concise.

Alignment
Aligning your elements provides white space and order which is easier on the eye.

Hierarchy
Use size to bring attention to the most important information in your ad. If everything is the same size, nothing stands out.

White space
Give your message room to breathe. Create space around each element.

Mandatory identifiers
Please note the **funding line** and the **two wordmarks**. Please see the second page for more information

Call to action
Make sure to give your audience the next step.

Buffer zone
The minimum protective space is X, where X is equal to the height of the period symbol.

Minimum size
The Alberta Government logo can be no smaller than .75".

The following identifiers are mandatory

Wordmarks

The wordmarks are shown as reversed (white on dark background) but several versions are available to use in various formats. Use the .eps for professional printing.

Canada and Alberta wordmark
Use as one graphic. This combination is to be used on all promotional material.

Brief guidelines for all wordmarks

- Do not alter
- Maintain a buffer zone; adhere to the miniumum space
- May not appear on a visually conflicting background
- May not form part of a headline, phrase or sentence

For a complete manual go to the following sites.

Guide on the public acknowledgement of financial support
canada.pch.gc.ca/eng/1428491994616

Alberta corporate identity manual
corporateidentity.alberta.ca/downloads/Alberta_Corporate_Identity_Manual.pdf

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Funding line

The following acknowledgement **must** be used on all publications. The French translation is to be used at the discretion of the user.

> "The Province of Alberta is working in partnership with the Government of Canada to provide employment support programs and services."

> "Les gouvernements de l'Alberta et du Canada travaillent en partenariat et financent conjointement des programmes et des services d'aide à l'emploi."

Contact Result	Phone	e-mail	mail	In-person	Client initiated	Results Explanation
Left voicemail – Follow up with call	x					Client did not answer the phone. Service provider left a voicemail and will follow up with a call. An additional contact attempt is required to complete this referral.
E-mail/Letter sent – Follow up with call		x	x			An outreach email/letter was sent to the client and the service provider will follow up with a call. An additional contact attempt is required to complete this referral.
E-mail/Letter sent – Information provided.		x	x			A marketing letter is sent inviting client to an event. Referral can be closed immediately after sending the letter. Used also for providing generic information about other services, services in French or referrals to other regions.
Employed – Found a new job	x	x	x			Client is not interested/will not attend meeting as he/she has found a new job.
Employed – Returning to former/seasonal job	x	x	x			Client is not interested/will not attend meeting as he/she will be returning to his/her former/seasonal job.
Interested – Meeting Scheduled	x	x	x			Client is interested in services/program. A meeting was scheduled for a future date. Service providers should wait to complete this referral when the result is known.
Interested – Will call back to schedule meeting	x	x	x			Client is interested in services/program. Client will think about and call back to schedule a meeting. Service providers should wait to complete this referral when the result is known.
Interested – Referred to Another Service Provider	x	x	x			Client is referred to another service provider who provides services/program that the client is interested in.
Attended meeting – Will participate in a program or service				x		Client attended the meeting scheduled, and will participate in an employment services/program offered by the service provider.
Did not attend meeting					x	Client did not show up to the meeting without a cancellation notice. * *Client initiated* is selected because the *contact method* is a mandatory field.
Not interested – Enrolled in school / program	x	x	x			Client is not interested/will not attend meeting as he/she has enrolled in school or another employment program.
Not interested – Family responsibilities	x	x	x			Client is not interested/will not attend meeting due to family responsibilities.

Not interested – Health problem(s)	x	x	x			Client is not interested/will not attend meeting due to personal health problem(s) (If health problems are not their own, please use Not interested- Family responsibilities).
Not interested – Moving	x	x	x			Client is not interested/will not attend meeting as he/she will be moving.
Not interested – No help required	x	x	x			Client is not interested/will not attend meeting as he/she is confident seeking employment on his/her own.
Not interested – Union hiring hall	x	x	x			Client is a union member and is working with his/her union hiring hall to find employment. For example Carpenter's Union.
Not interested – Duplicate Referral					x	From time to time providers may receive duplicate referrals from the same individual. This is usually triggered when an applicant adds new information to their current EI application and the referral is generated again a short time after the initial referral has been received. This is not to be used for a referral that has been received previously in the last few months. Those are considered new referrals and should be contacted again. * *Client initiated* is selected because the *contact method* is a mandatory field.
Not interested – Other	x	x	x			Client is not interested/will not attend meeting due to unspecific reasons (and anything not accounted for in other Not interested options)
Unable to Contact – Applicant did not call back	x					Client who was supposed to call back to schedule a meeting did not call back.
Unable to contact - Email/mail was undeliverable and/or unable to leave message	x	x	x			Phone, email and mail attempts to contact were unsuccessful.
Not interested - TRF Administrator only					x	The feedback option is for TRF administrator use only. Service providers should not use this option for any reason. * *Client initiated* is selected because the *contact method* is a mandatory field.