

**RECOGNITION COUNTS – CLIENT REFERRAL PROCESS WALKTHROUGH**

**SUMMARY**

- Referral Staff meets with a client and believes a loan would be the right option for them and decides to refer them to SEED
1. Referral Staff logs-in (SEED provides username-password), obtains and gives a Registration Code to the client
- Client registers using that code and completes the CAP
  - Referral Staff receives an automatic email notification once the client submitted the CAP
2. Referral Staff logs-in, reviews the CAP following the [Referral Checklist](#) provided below and discusses, if needed, options with client - **Staff clicks YES / NO** to recommend or not the CAP to be considered by SEED

**For Referral Partners located outside of Winnipeg**

3. If the client decides to apply to Recognition Counts, referral staff will sign and date a photocopy of the Identifications presented by the client (usually 3 pieces of ID are required)

**DETAILS**

**Step 1. Logging in and generating Registration Codes for new clients:**

Go to [recognitioncounts.ca](http://recognitioncounts.ca)  
and click on **REFERRAL PARTNER**



You will be taken to the login page:

**Login**

Please fill out the following form with your login credentials:

Username \*

Password \*

[Forgot Password?](#)

I am using a public computer

Remember me next time

Login

If you always use the same computer, check **“Remember me next time”** (you won’t need to login every time you access the page).

Default is: **I’m using a public computer** you will be logged out automatically after 30 minutes of inactivity

Enter the login information you received from SEED and you will be taken to the Recognition Counts Dashboard.

**Note:** If this is the first time you login, change your password immediately by hitting *Update Profile*

**RECOGNITION COUNTS**  
Loans for Skilled Immigrants

Hello, [Redacted] [Logout](#)

[Guides and Forms](#) [Update Profile](#)

Dashboard **Registration Codes** Loan Calculator Glossary Case Studies

Client Last Name	Client First Name	CAP Submission	Last Updated	CAP Status	CAP Details
[Redacted]	[Redacted]	Jan 07, 2015	Jan 29, 2015	Approved	<a href="#">View</a>
[Redacted]	[Redacted]	Nov 20, 2014	Dec 31, 2014	Approved	<a href="#">View</a>

Go to page: 1 Show rows: 10 1-2 of 2

Click on Registration Codes

You will be taken to the summary page of all registration codes you have assigned, if any.

Registration Codes

Registration Code	Used?	Client Last Name	Client First Name	Date Created
4172f	Yes	[REDACTED]	[REDACTED]	Jan 07, 2015
85324	Yes	[REDACTED]	[REDACTED]	Dec 15, 2014

Click on *Generate Registration Code* and you will see the new Registration Code created. Provide this code to the client (you can use the cards provided by SEED).

As soon as the client registers, it will be automatically assigned to the staff that generated the code as shown below.

has been successfully created.

Registration Code	Used?	Client Last Name	Client First Name	Date Created
[REDACTED]	No	[REDACTED]	[REDACTED]	Dec 10, 2013
6cfc8	Yes	[REDACTED]	[REDACTED]	Dec 02, 2013
2c0ba	Yes	[REDACTED]	[REDACTED]	Sep 26, 2013

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Once the client logs in using this registration code and submits a CAP for you to review, you will get an email notifying you to review a new CAP. You will also be able to access it from the Dashboard where you can see the CAP details by hitting *view*.

The screenshot shows the Recognition Counts dashboard. At the top left is the logo and name. On the right, there is a user greeting "Hello, [redacted]" with a "Logout" link, and buttons for "Guides and Forms" and "Update Profile". Below this is a navigation menu with tabs for "Dashboard", "Registration Codes", "Loan Calculator", "Glossary", and "Case Studies". The main content area features a table with the following data:

Client Last Name	Client First Name	CAP Submission	Last Updated	CAP Status	CAP Details
[redacted]	[redacted]	Jan 07, 2015	Jan 29, 2015	Approved	<a href="#">View</a>
[redacted]	[redacted]	Nov 20, 2014	Dec 31, 2014	Approved	<a href="#">View</a>

At the bottom of the table, there is a pagination control: "Go to page: 1 Show rows: 10 1-2 of 2". A red arrow points from the text above to the "View" link in the second row of the table.

## Step 2. Reviewing and submitting the client’s CAP to Recognition Counts

Once you received the automatic email notification that a CAP has been submitted, login again, review the CAP following the [Referral Checklist](#) and click on **YES / NO**

**Note:**

You can add comments, highlights or concerns about that CAP and/or client. Client will not see the notes and are meant to help RC staff to have a better understanding of the client’s plan

The screenshot shows the "Career Action Plan - ID #419" review interface. At the top, there are navigation tabs: "Activities and Notifications", "Client History", "View Users", "Reports", "Disbursements", "Loan Calculator", "Glossary", and "Case Studies". The main content area is divided into two columns. The left column contains expandable sections: "Personal Information", "Education and Employment", "Current Employment Status", "Preparing for Employment in MB", and "Preliminary Loan Planning". The right column shows the "Current Status: Pending" and a message: "This Career Action Plan meets RC Guidelines and is recommended for RC considerations". Below this are two large buttons: "Yes" (green) and "No" (yellow-green). At the bottom right, there is a "Notes" section with a text area and a "Date: November 3, 2016, 1:48 pm" timestamp. A red arrow points from the "Note" text above to the "Yes" button.

**Step 3. Client identification (AREAS OUTSIDE OF WINNIPEG ONLINE PROCESS ONLY)**

1. In order to obtain a loan, Assiniboine Credit Union (ACU), needs to be able to properly identify the client. After the referral process is completed and once the client decides to apply to SEED, the referral partner's staff will need to sign and date a photocopy of the client's 3 pieces of IDs presented.

**Note:** Client must have access to a scanner and a computer with WebEx installed, camera, mic and speaker

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If you have any question about the online process or referring clients to SEED, contact:

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