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

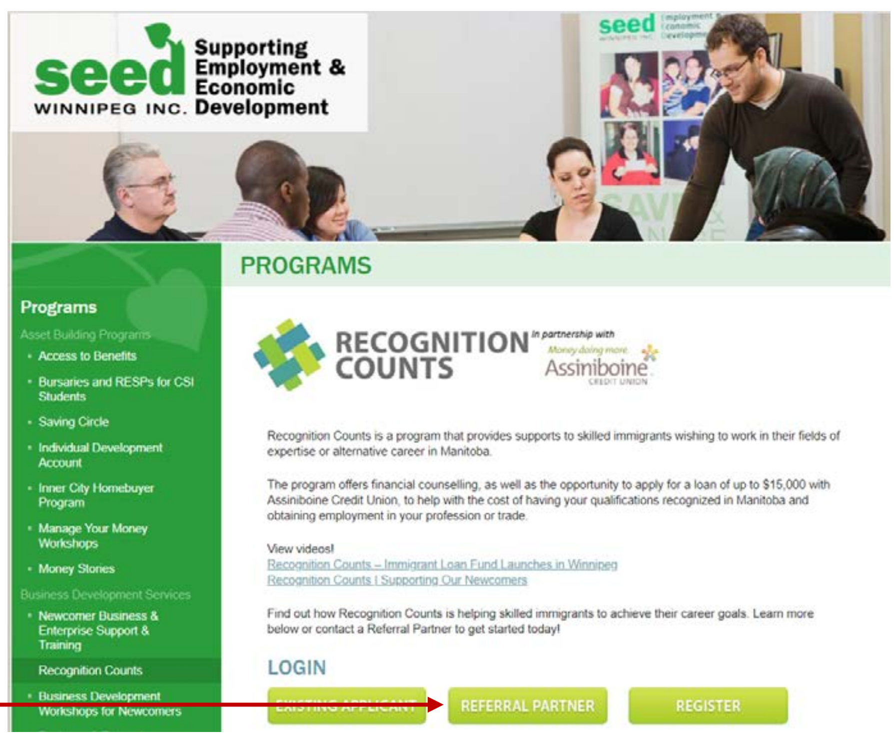
3. If the client decides to apply to Recognition Counts, referral staff will sign and date a photocopy of the Identifications presented by the client (usually 3 pieces of ID are required)

DETAILS

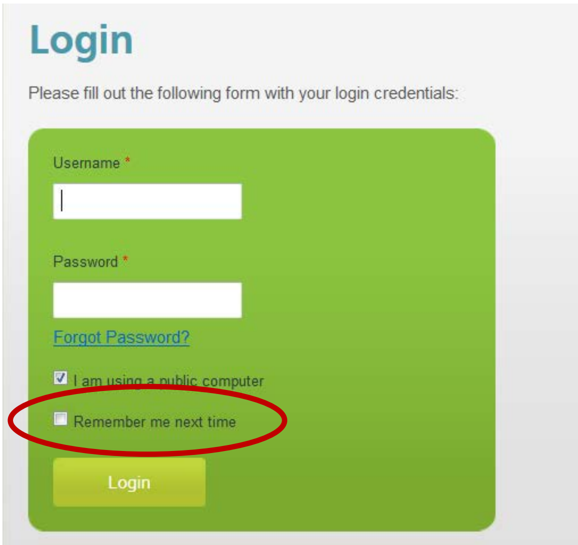
Step 1. Logging in and generating Registration Codes for new clients:

Go to recognitioncounts.ca

and click on REFERRAL PARTNER



You will be taken to the login page:

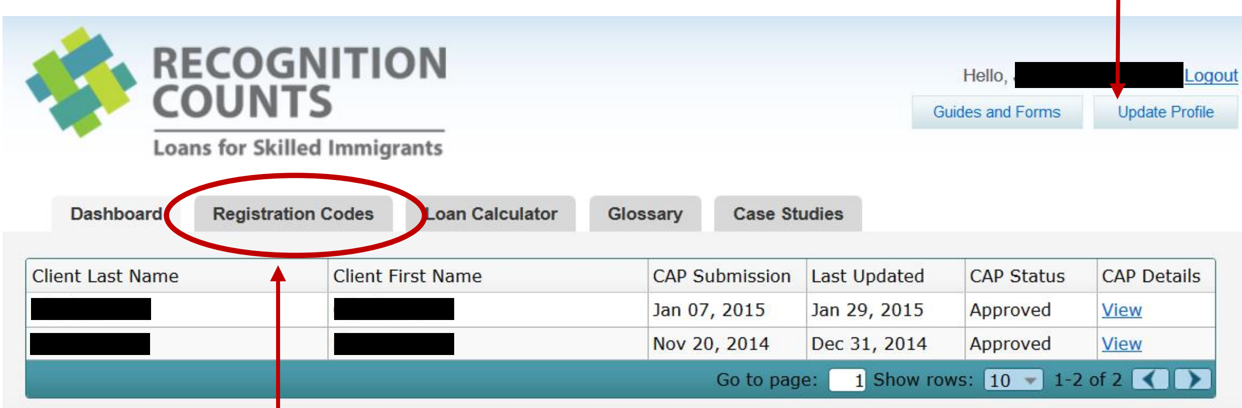


If you always use the same computer, check "**Remember me next time**" (you won't need to login every time you access the page).

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

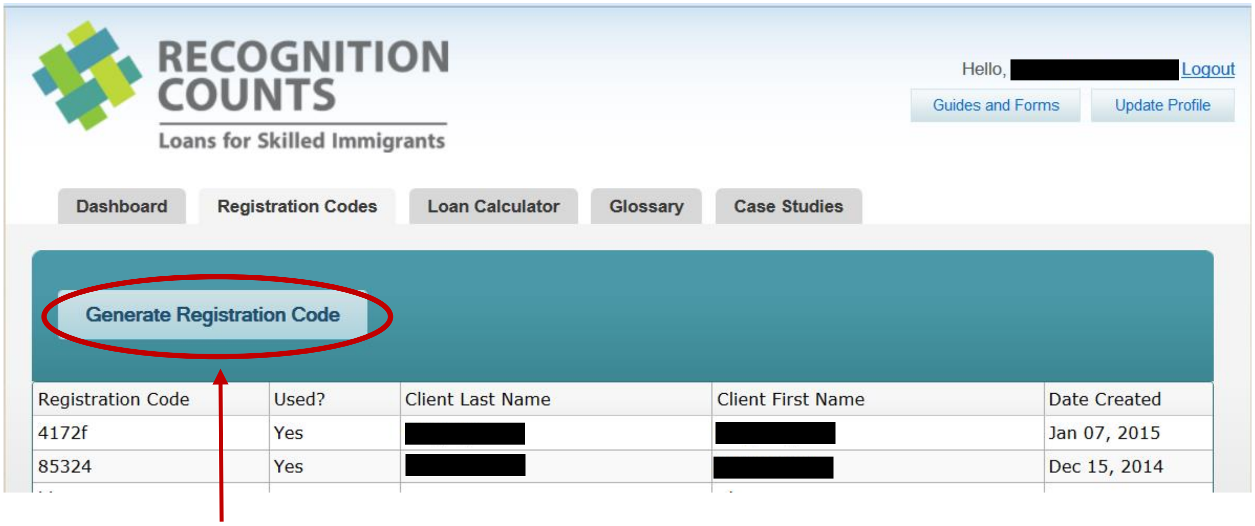
Enter the login information you received from SEED and you will be taken to the Recognition Counts Dashboard.

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



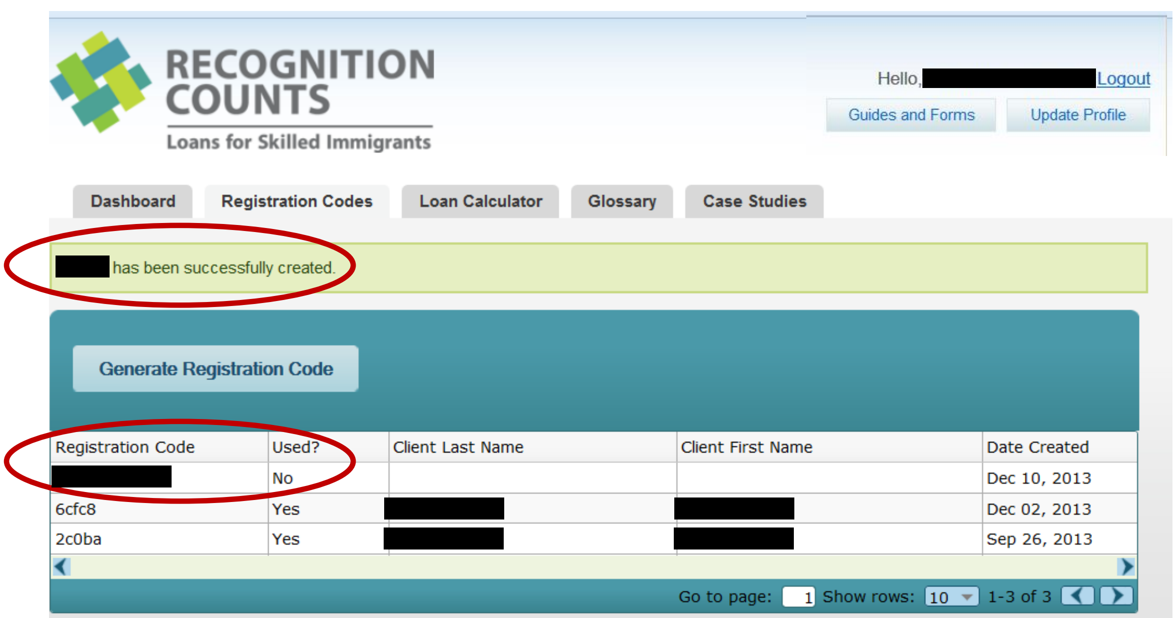
Click on Registration Codes

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

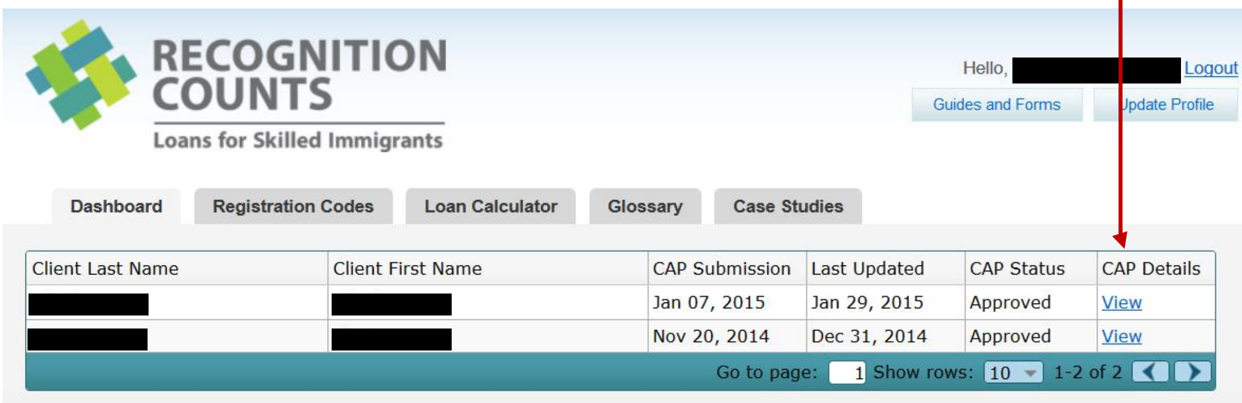


Click on *Generate Registration Code* and you will see the new Registration Code created. Provide this code to the client (you can use the cards provided by SEED).

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



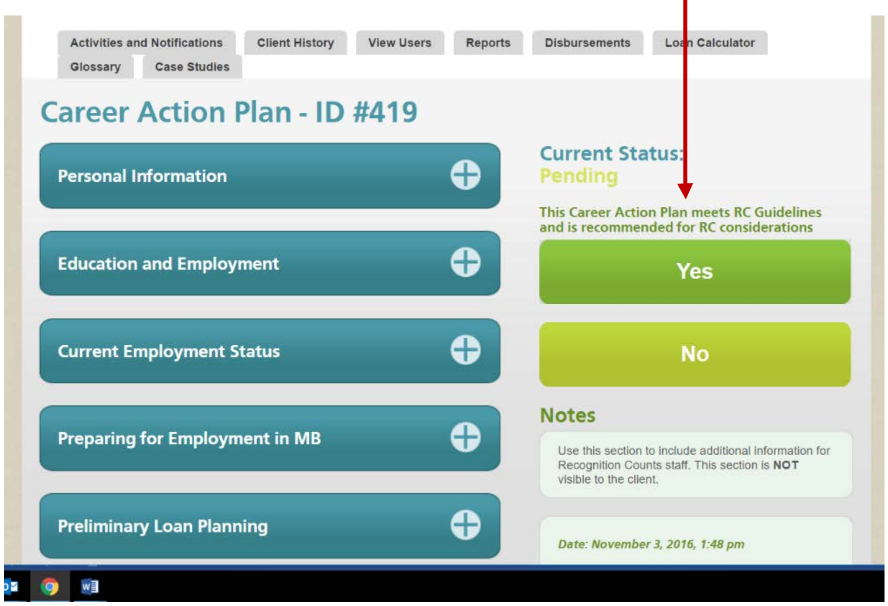
Once the client logs in using this registration code and submits a CAP for you to review, you will get an email notifying you to review a new CAP. You will also be able to access it from the Dashboard where you can see the CAP details by hitting *view.*



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



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

---

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

Nef (204) 927-9937 nef@seedwinnipeg.ca

Sandra (204) 594-0549 sandra@seedwinnipeg.ca