## RECOGNITION COUNTS (RC) – 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 temporary username and password), obtains and gives a Registration Code to the client. Provide the client with a Registration Guide and a User Guide.

- Client registers using that code and completes their online Career Action Plan
- Referral Staff receives an automatic email notification once the client submitted the CAP

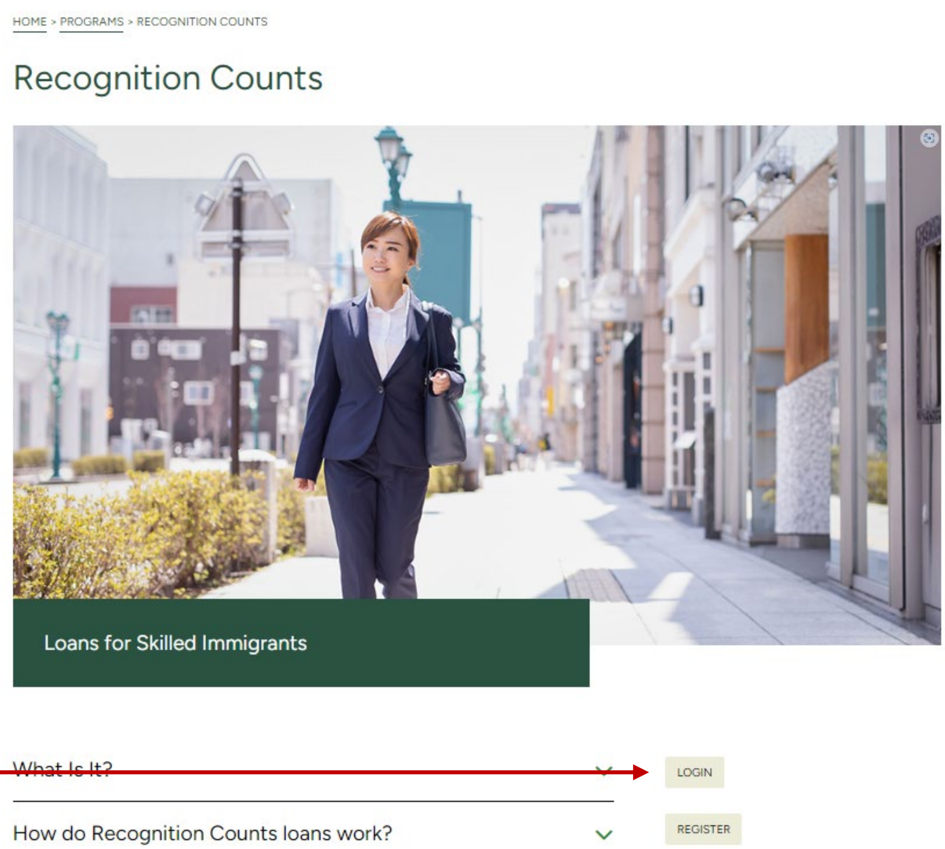
2. Referral Staff logs-in, reviews the CAP following the *Referral Checklist* provided on the Recognition Counts website and discusses, if needed, options with client - **Staff clicks YES / NO** to recommend or not the CAP to be considered by SEED

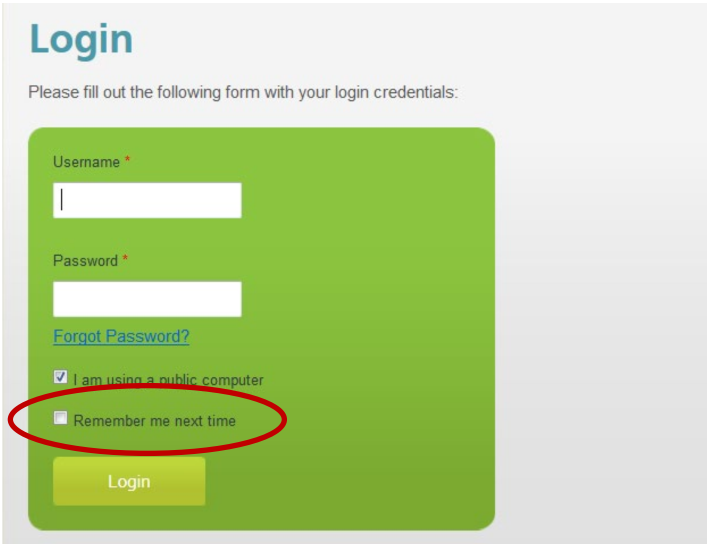
### DETAILS

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

Go to recognitioncounts.ca and click on LOGIN

You will be taken to the login page:



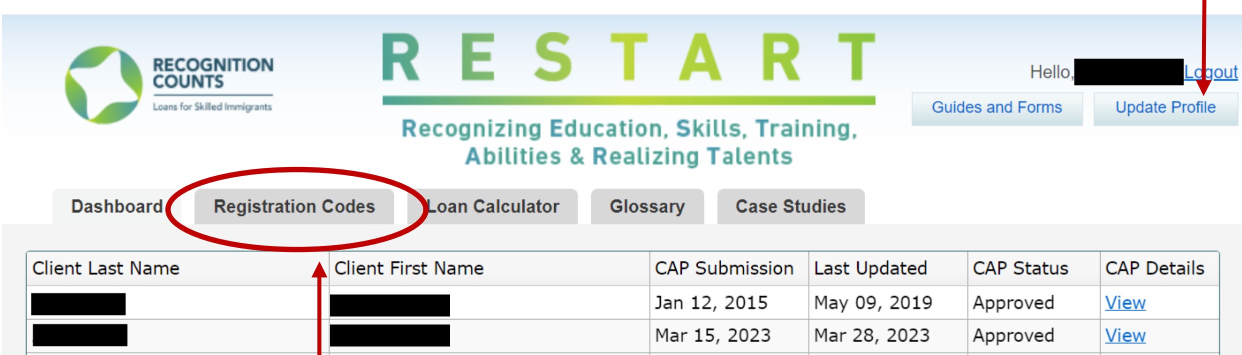



If you always use the same computer, check "**Remember me next time**" (you won't need to login every time you access the page).

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

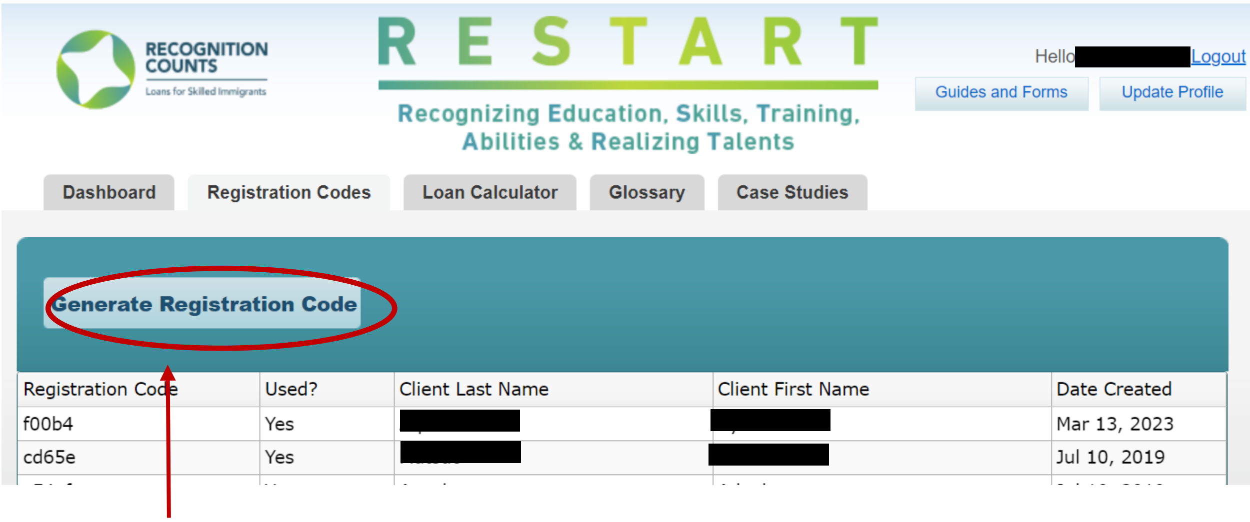
Enter the login information you received from SEED and you will be taken to the Recognition Counts Dashboard.

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



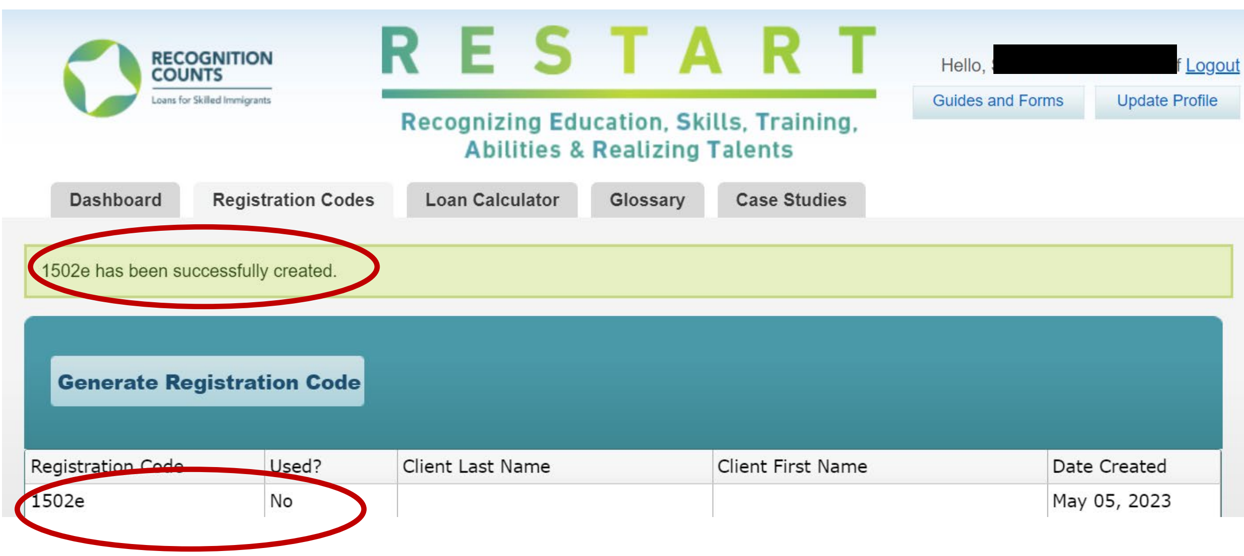

Click on Registration Codes

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.

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



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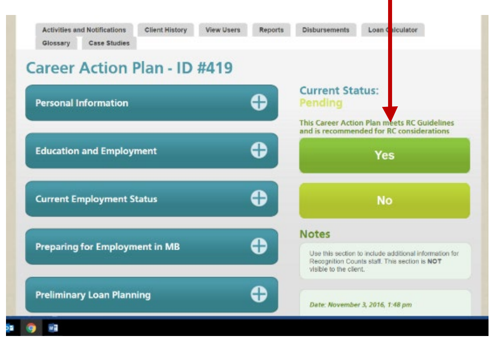
Once the client logs in using this registration code and submits a CAP for you to review, you will get an email notifying you to review a new CAP. You will also be able to access it from the Dashboard where you can see the CAP details by hitting *view.*


**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. The client will not see the notes. These are meant to help Recognition Counts staff to have a better understanding of the client's plan.




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

Recognition Counts Loan Coordinator (204) 927-9937 jeff@seedwinnipeg.ca

Recognition Counts Program Manager (204) 594-0549 sandra@seedwinnipeg.ca

Recognition Counts website: www.recognitioncounts.ca