Chapter 08I: Employment Action Plan Management for Integrated Employment Services

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Document History

Version #	Date	Description
1.0	January 2021	Initial version of guide
1.1	January 2023	Guide update to address: • Additional rules and functionality • EAP Plan Item Appendix addition • ESQ and Skip Logic Appendix addition • Supporting Documents Appendix addition

8.1   Introduction

Employment Ontario service providers create road maps or plans for individuals that detail the benefits and services that the service provider can deliver in order to meet client needs. Employment Ontario refers to this type of plan as an Employment Action Plan. The Employment Action Plan is a system tool that allows Employment Ontario's SSM service provider to plan and manage the delivery of services and activities to help a client achieve a specific goal.

The primary reason for the creation of any Employment Action Plan is to enable a client to achieve a specific goal and building these steps individually provides a more manageable way of achieving the overall Employment Action Plan goal.

8.2   Client Profile Creation

The client profile stores information about the client that is common to all Employment Ontario programs and services and is viewable and editable by all system users (within both the ministry and service providers) with the appropriate system permissions.

For the EAP, client profile registration information that is collected within a client Common Assessment is used to create a CaMS Client Profile record in CaMS upon Common Assessment submission. Upon common assessment submission, the system stores the registration information creates a client profile in CaMS and assigns a unique identifier (a reference number) for each participant. The client will use this client profile for their Employment Ontario activities.

If the client was already a participant of Employment Ontario Services, their existing client profile record in CaMS will be updated upon Common Assessment submission. The system will use the following factors to determine whether a client is new to Employment Ontario or if a profile already exists for them.

If there are issues with the submission automation, the Common Assessment record will be submitted to CaMS but instead of creating or updating a client the system will display the impacted common assessment record within the '*View Common Assessment' tab* in CaMS where it will need manual review and user interaction to either create a new record or update an exist record using the submitted Common Assessment information.

8.3 Employment Action Plan

Employment Action Plan includes two goals, one or more sub-goals, and one or more plan items for each sub-goal.

8.3.1 Common Assessment

Common Assessment is a mandatory element, and it captures details that are unique to the client. An EAP can only be associated to a single common assessment record, and once that link is made through using that CA record to create the client EAP, then the CA record is no longer available for use. A read-only copy of the client's Common Assessment record will be available for review within the client's Employment Action Plan. The following table notes the different statuses available for a submitted Common Assessment record in CAMS.

Common Assessment Status	Description
Processed	Submitted to CAMS and client record created
Submitted	Submitted to CAMS but no client record created
Unprocessed	Submitted to CAMS but a newer Common Assessment record has been submitted

8.3.2 Goals

The goal is the primary objective or desired outcome of the Employment Action Plan, which the client is working towards. For example, the Employment Action Plan goals are "Self-Employment" and "Employment".

8.3.3 Sub-Goals

The goals can be broken down into a series of more manageable steps, the aim of which are to assist the client in achieving the overall goal. These steps are known as sub-goals, which will consist of one or more scheduled activities or plan items. The successful completion of some or all plan items is required to successfully attain a sub-goal.

The Employment Action Plan sub-goals are:

- Life Stabilization
- Employment Assistance Services
- Employer Financial Supports
- Jobseeker Financial Supports
- Skills Development - Ministry Delivered Programs
- Skills Development - Other
- Retention
- Specialized Services

8.3.4 Plan Items

Plan items are the fundamental building blocks of an Employment Action Plan. They are the benefits, services, and activities that are added to a sub-goal in order to achieve the plan goal. Plan items can be configured with cost, outcome and start and end dates.

8.3.5 Plan Summary

A plan summary is a mandatory element for each Employment Action Plan. It details the activities that the client agrees to undertake to achieve their Employment Action Plan goal. It reflects the structure of the plan and all activities listed under it. The plan summary is autogenerated when the Employment Action Plan is activated. The plan summary may be printed but is not a binding agreement.

8.4   Building an Employment Action Plan

The successful creation of an Employment Action Plan requires the following steps to be performed in sequence and will be explained in this section.

1. Create Employment Action Plan
2. Add Sub-Goal(s)
3. Add Plan Items to Sub-Goal(s)
4. Activate Employment Action Plan
5. Access Plan Summary

6. Modify Plan Summary
7. Modify, Complete Plan Item
8. Delete Plan Item
9. Cancel Plan Item
10. Cancel Sub-Goal
11. Delete Sub-Goal
12. Complete Sub-Goal
13. Add Outcome
14. Modify Add Outcome Questionnaire
15. Complete Outcome Checkpoints
16. Modify Outcome Checkpoints
17. Modify, Complete Review System Tabs
18. Close Employment Action Plan

8.4.1 Create Employment Action Plan

Prerequisite

Common Assessment must be processed in order to create an Employment Action Plan for a client.

System Steps

⮕ Step 1: Employment Ontario Home Page – Common Assessment Tab

Select Common Assessment Record. Click **CREATE EAP** from the **Action Button**.

Type	Employment Ontario	Creation Date	30/12/2020
Status	Open		

Home	Common Assessment	Referrals	Events	Administration	Recent Changes	Assessments

Client Name	Common Assessment Ref#	Status	Service Delivery Site	
Molly Tealeaf	CA1004283	Processed	3789A	...
Molly Tealeaf	CA1004283	Processed	3789A	Create EAP...

⮕ Step 2: Create Employment Action Plan Page

Complete all fields. For the **Service Delivery Site**, click on the drop-down menu and select the appropriate **Service Delivery Site Name**. Only **Service Delivery Sites** offering the selected program will appear in the list. For the **Employment Goal**, goal must be entered. Click **SAVE**.

➲ Step 3: Employment Action Plan Home Page

Ensure that all information in the Employment Action Plan is correct.

Once an Employment Action Plan has been created, the status will be set to "Open;" this appears on the Employment Action Plan Home page.

The Common Assessment tab within the EAP will house a read-only copy of the client's submitted Common Assessment.

Program	Employment Action Plan	Status	Active
Start Date	14/01/2021	Closed Date	
Owner	Martin Hanna	Service Delivery Site	2112123

Home **Common Assessment** Plan Content Plan Summary Case Notes Outcomes

Common Assessment Details

CA Number	CA1004784	Submitted Date Time	2021-01-14T09:38:49.990Z
Stream	Stream C	Referred By	
Submitted By	IAAP113035	Referred?	false

▸ Question Group: Basic Information

▸ Question Group: Mailing Address and Contact Information

▸ Question Group: Demographic Information

▸ Question Group: Skills

▸ Question Group: Supports and Service Needs

▸ Question Group: Income and Assistance

▸ Question Group: Disability Information

▸ Question Group: Employment Status and History

▸ Question Group: Employment Goals

For EO/SA Integrated Clients, a Social Assistance tab will be available within the EAP. This tab will house read-only information from Social Assistance's Case Management System regarding a client's Goals, Barriers, Referrals, Benefits and Case Notes.

Program	Employment Action Plan	Status	Active
Start Date	28/01/2021	Closed Date	
Owner		Service Delivery Site	

Home Common Assessment **Social Assistance** Plan Content Plan Summary Case Notes Outcomes

Goals

Barriers

Referrals

Goals

	Goal	Category	Start Date	End Date	Status
▸	Develop Resilience	Life Skills	22/10/2021		In-progress
▸	Access Transportation	Community Supports	22/10/2021		In-progress
▸	Support for Ongoing Medical Conditions	Health	20/01/2021		In-progress
▸	Full-Time Employment	Employment	20/01/2021		In-progress

8.4.2 Add Sub-Goal(s)

➲ Step 1: Employment Action Plan Home Page

Select the **Plan Content** tab.

➲ Step 2: Plan Content Page

Click **NEW SUB-GOAL**.

⮑ Step 3: Create Sub-Goal Page

Click **SELECT** for the appropriate **Sub-Goal** and click **SAVE**.
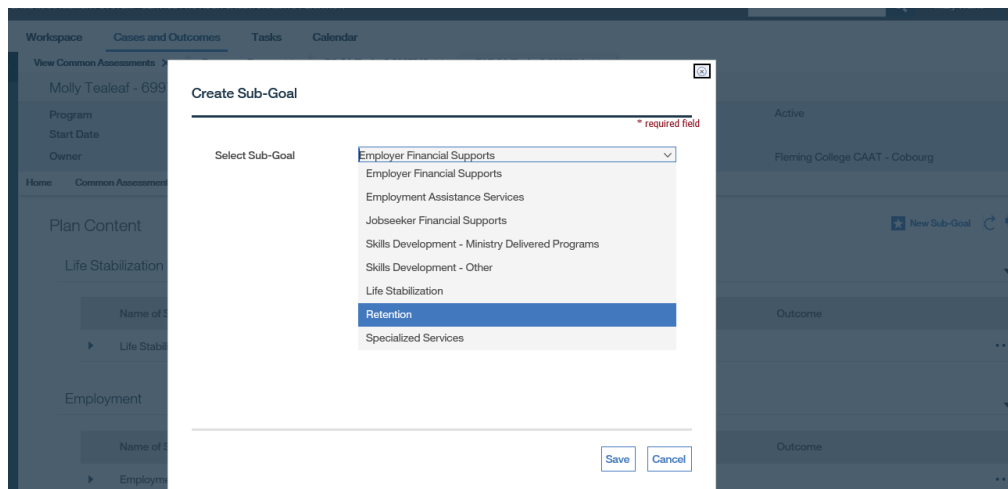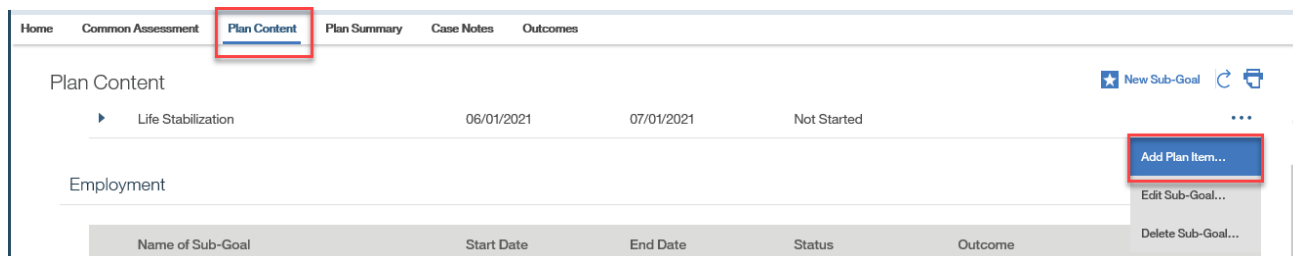

8.4.3 Add Plan Items to Sub-Goals

 Fields on the Plan Item page will vary depending on the activity, service or benefit.

8.4.3.1 Add Plan Item(s) - Basic

⮑ Step 1: Plan Content Page

From the **Action Button** next to the appropriate sub-goal, click **ADD PLAN ITEM**.

⮞ Step 2: Select Plan Item Type Page

Click the checkbox(es) next to the appropriate **Plan Item**(s) and click **SAVE**.

8.4.3.2   Add Plan Item(s) - Placement, Job Trials

Prerequisite

To us an employer record within a placement or job trials plan item type, the employer must be registered in the CAMS system, and it must also be associated to a Corporate Entity. If the Employer is not registered or not associated to a Corporate Entity, please refer to the **Employer Management** chapter.
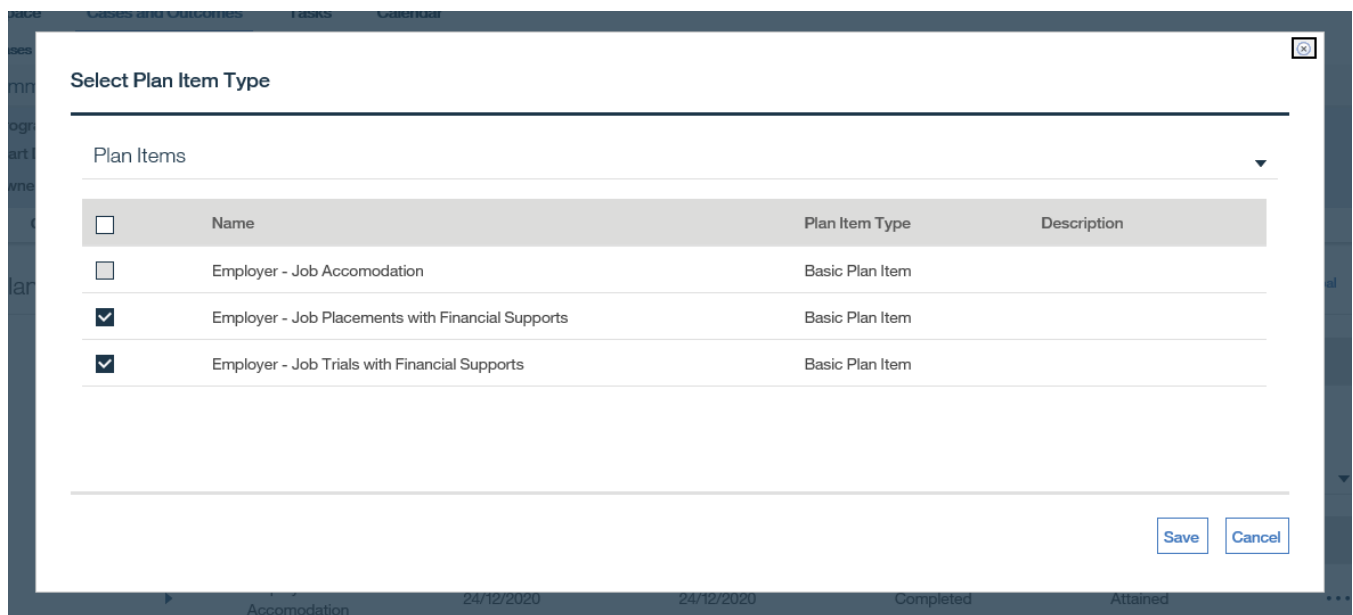
Follow step 1 in Section 8.3.3.1.

⮞ Step 2: Select Plan Item Type Page

In the list of plan items associated with the **Employment Assistance Services** sub-goal, click the checkbox next to **Employer - Job Placements** or **Employer - Job Trials** and click **SAVE**.

In the list of plan items associated with the **Employer Financial Supports** sub-goal, click the checkbox next to **Employer - Job Placements with Financial Supports** or **Employer - Job Trials with Financial Supports** and click **SAVE**.

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8.4.3.3 Add Plan Item(s) - Financial Supports

Follow step 1 in Section 8.3.3.1.

➲ Step 2: Select Plan Item Type Page

In the list of plan items, click the checkbox next to **Financial Support Plan Item** and click **SAVE**.

Select Plan Item Type

☐	Job Seeker - Accommodation Needs - Assistive Devices and Adaptive Technology	Basic Plan Item
☐	Job Seeker - Accommodation Needs - Job-Specific Communications Skills Training	Basic Plan Item
☐	Job Seeker - Accommodation Needs - On-the-Job Supports	Basic Plan Item
☐	Job Seeker - Certification Charges	Basic Plan Item
☐	Job Seeker - Diagnostic Assessment	Basic Plan Item
☐	Job Seeker - Emergency/Infrequent Child Care	Basic Plan Item
☐	Job Seeker - Employment-Related Special Equipment and Supplies	Basic Plan Item
☐	Job Seeker - Employment-Related Transportation	Basic Plan Item
☐	Job Seeker - Language Skills Assessment	Basic Plan Item

Save   Cancel

Select Plan Item Type

Plan Items ▾

	Name	Plan Item Type	Description
☐	Employer - Job Accomodation	Basic Plan Item	
☑	Employer - Job Placements with Financial Supports	Basic Plan Item	
☑	Employer - Job Trials with Financial Supports	Basic Plan Item	

Save   Cancel

▶ Accomodation	24/12/2020	24/12/2020	Completed	Attained

 ➲ Step 3: Add Attachments for Proof of Purchase

Click **ADD ATTACHMENT** from the **Action Button**.

Select the **Document Type** from the available drop-down options and complete all required fields.

Click **SAVE**.

8.4.3.4   Add Plan Item(s) - Custom Basic Plan Item

Follow step 1 in Section 8.3.3.1.

âž¢ Step 2: Select Plan Item Type Page

In the list of plan items, click the checkbox next to **Custom Basic Plan** Item and click **SAVE**.

Select Plan Item Type		
☐	Career Exploration, Planning and Management	Basic Plan Item
☐	Client Counselling	Basic Plan Item
☑	Custom Basic Plan Item	Custom Plan Item
☐	Employability Skills Training	Basic Plan Item
☐	Employer Coaching	Basic Plan Item
☐	Employer - Job Placements	Basic Plan Item
☐	Employer - Job Trials	Basic Plan Item
☐	Job Coaching	Basic Plan Item
☐	Job Matching and Development	Basic Plan Item
☐	Job Search	Basic Plan Item

Save   Cancel

Comments are mandatory for Custom Basic Plan Items.

8.4.4 Activate Employment Action Plan

Prerequisite:

- The Employment Action Plan must have at least one sub goal and plan item defined before it can be activated.

âž¢ Step 1: Employment Action Plan Home Page

Review the Employment Action Plan and click **ACTIVATE** from the **Action Button**.

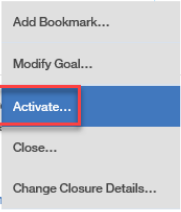| Program	Employment Action Plan	Status	Open
Start Date	18/01/2021	Closed Date	
Owner	Mary Walke	Service Delivery Site	Fleming College CAAT - Cobourg

Home Common Assessment Plan Content Plan Summary Case Notes Outcomes

Service Plan Home

Case Details

Add Bookmark…
Modify Goal…
Activate…
Close…
Change Closure Details…

Primary Client	sprinkle weasel	Referred In	EO - App Apprentic
Owner	[Change Owner]	Total Supports	
Service Delivery Site	Fleming College CAAT - Cobourg [Change Service Delivery Site]	Current Employer	N/A [Chan
Client Stream	Stream C	PDC Reference Number	N/A [Change PDC Reference Number]
Closure Reason			

Employment Goals

➲ Step 2: Activate Employment Action Plan Page

When prompted to activate EAP, enter date and click **SAVE**.

sprinkle weasel - 7002112

Activate EAP

* required field

Details

| Issue To | sprinkle weasel |
| Accepted Date | 18/01/2021 |

Save Cancel

If the Accepted Date is left blank when activating the EAP, the EAP status will change to Approved and a user will need to add a Date Accepted in the client's Plan Summary to activate the EAP accordingly.

8.4.5 Access Plan Summary

➲ Step 1: Employment Action Plan Home Page

Select the **Plan Summary** tab.

Program	Employment Action Plan	Status	Active
Start Date	18/01/2021	Closed Date	
Owner	▬▬▬▬▬	Service Delivery Site	Fleming College CAAT - Cobourg

Home   Common Assessment   Plan Content   **Plan Summary**   Case Notes   Outcomes

Plan Summary   ⭐ New ↻ 🖶

Action	Issued To	Date Issued	Status
Select	sprinkle weasel	18/01/2021	Accepted

➲ Step 2: Plan Summary Page

When an Employment Action Plan has been activated, a plan summary for the client is autogenerated and can be found on the Plan Summary page. The system populates the summary using the client and the client's address. The **Issued Date** is set to the current date and the **Reason** is set to "Initial."

To access the Plan Summary, click **SELECT**.

Program	Employment Action Plan	Status	Active
Start Date	18/01/2021	Closed Date	
Owner	▬▬▬▬▬	Service Delivery Site	Fleming College CAAT - Cobourg

Home   Common Assessment   Plan Content   **Plan Summary**   Case Notes   Outcomes

Plan Summary   ⭐ New ↻ 🖶

Action	Issued To	Date Issued	Status
Select	sprinkle weasel	18/01/2021	Accepted

➲ Step 3: Plan Summary Home Page

To print the plan summary, select **DOWNLOAD PLAN IN ENGLISH** or **DOWNLOAD PLAN IN FRENCH** (depending on the language the client prefers) from the **Action Button**.

8.4.6 Modify Plan Summary

➲ Step 1: Plan Summary Home Page

From the **Action Button**, click **EDIT**.

➲ Step 2: Modify Plan Summary Details Page

To record contract acceptation (if needed), enter the **Date Accepted** in the **Acceptance** information panel.

To record contract rejection, enter the **Date Rejected** in the **Rejection** information panel, and select the reason from the **Rejection Reason** drop-down menu.

To record contract cancelled, enter the **Date Cancelled** in the **Cancellation** information panel, and select the reason from the **Cancellation Reason** drop-down menu.

Once all appropriate fields are complete, click **SAVE**.

8.4.7 Modify, Complete Plan Item

➲ Step 1: Employment Action Plan Home Page

Click the **Plan Content** tab.

➲ Step 2: Plan Content Page

Toggle the relevant sub-goal.

Program	Employment Action Plan	Status	Active
Start Date	13/01/2021	Closed Date	
Owner	▬▬▬▬	Service Delivery Site	Fleming College CAAT - Cobourg

Home   Common Assessment   Social Assistance   **Plan Content**   Plan Summary   Case Notes   Outcomes

Plan Content   ⭐ New Sub-Goal ↻ 🖶

Life Stabilization   ▼

	Name of Sub-Goal	Start Date	End Date	Status	Outcome	
▼	Life Stabilization	14/01/2021	14/01/2021	Completed	Attained	···

Plan Items   ▼

	Name	Start Date	End Date	Status	Outcome	
▶	Basic Needs - Housing	14/01/2021	14/01/2021	Completed	Attained	···

⮑ Step 3: Plan Content Page

Click **EDIT PLAN ITEM** from the **Action Button** next to the relevant plan item.

Program	Employment Action Plan	Status	Active
Start Date	13/01/2021	Closed Date	
Owner	▬▬▬▬	Service Delivery Site	Fleming College CAAT - Cobourg

Home   Common Assessment   Social Assistance   **Plan Content**   Plan Summary   Case Notes   Outcomes

Plan Content   ⭐ New Sub-Goal ↻

	Name of Sub-Goal	Start Date	End Date	Status	Outcome	
▼	Life Stabilization	14/01/2021	14/01/2021	Completed	Attained	··

Plan Items   ▼

	Name	Start Date	End Date	Status	Outcome	
▶	Basic Needs - Housing	14/01/2021	14/01/2021	Completed	Attained	···

Comments

                                                                    Edit Plan Item…
                                                                    Delete Plan Item…

⮑ Step 4: Modify Plan Item Page

Enter the **Actual Start Date** and **Actual End Date**. Select the appropriate **Outcome** from the drop-down menu. If applicable, enter an amount in **Actual Cost** and complete **Placement** Information. Select a value for **Employer Satisfaction**. Click **SAVE.**

The sum of actual costs will display as **Total Supports** on the Employment Action Plan home page for the following sub-goals and plan items:

Jobseeker Financial Supports

- Job seeker - Accommodation needs - assistive devices and adaptive technology

- Job seeker - Accommodation needs - job-specific communication skills training

- Job seeker - Accommodation needs - on-the-job supports

- Job seeker - Diagnostic assessment

- Job seeker - Certification charges

- Job seeker - Academic credential or professional accreditation assessment

- Job seeker - Language skills assessment

- Job seeker - Short-term skills training

- Job seeker - Emergency/infrequent childcare

- Job seeker - Employment-related transportation

- Job seeker - Work clothing and/or grooming

- Job seeker – Employment-related special equipment and supplies

- Job seeker - Translation of international academic documents

- Job seeker - Specialized hardware

Employer Financial Supports

- Employer - Job accommodation

- Employer – Job Placements with Financial Supports

- Employer – Job Trials with Financial Supports

⮌ Step 5: Plan Content Page

The **Status** has now changed to "Completed" and the **Outcome** has now changed to "Attained."

8.3.8 Delete Plan Item

If a plan item has a status of "In Progress" or "Completed," it cannot be deleted; it can only be cancelled. Please refer to Section 8.3.9 Cancel Plan Item to perform this function. Once a plan item has been deleted, no record remains.

⮌ Step 1: Employment Action Plan Home Page

Click the **Plan Content** tab.

Program	Employment Action Plan	Status	Active
Start Date	13/01/2021	Closed Date	
Owner	▬▬▬	Service Delivery Site	Fleming College CAAT - Cobourg

Home Common Assessment Social Assessment **Plan Content** Plan Summary Case Notes Outcomes

Service Plan Home

Case Details

Primary Client	Carl▬▬▬	Referred In	EO - Action Center
Owner	▬▬▬ [Change Owner]	Total Supports	
Service Delivery Site	Fleming College CAAT - Cobourg [Change Service Delivery Site]	Current Employer	N/A [Change Current Employer]
Client Stream	Stream B	PDC Reference Number	N/A [Change PDC Reference Number]
Closure Reason			

⮂ Step 2: Plan Content Page

Toggle the relevant sub-goal.

Program	Employment Action Plan	Status	Active
Start Date	13/01/2021	Closed Date	
Owner	▬▬▬	Service Delivery Site	Fleming College CAAT - Cobourg

Home Common Assessment Social Assessment Plan Content Plan Summary Case Notes Outcomes

Plan Content

⭐ New Sub-Goal

Life Stabilization

	Name of Sub-Goal	Start Date	End Date	Status	Outcome	
▼	Life Stabilization	14/01/2021	14/01/2021	Completed	Attained	•••

Plan Items

	Name	Start Date	End Date	Status	Outcome	
▸	Basic Needs - Housing	14/01/2021	14/01/2021	Completed	Attained	•••

Comments

⮂ Step 3: Plan Content Page

Click **DELETE** from the **Action Button** next to the relevant plan item. When prompted to confirm the delete, click **YES**.

⮥ Step 4: Plan Content Page

The deleted plan item will no longer appear with the associated sub-goal.

8.3.9 Cancel Plan Item

⮥ Step 1: Employment Action Plan Home Page

Click the **Plan Content** tab.

⊃ Step 2: Plan Content Page

Toggle the relevant sub-goal.

⊃ Step 3: Plan Content Page

Click **EDIT** from the **Action Button** next to the relevant plan item.

⮑ Step 4: Modify Plan Item Page

Select "Cancelled" from the **Outcome** drop-down menu. If an **Actual Start Date** has been previously entered and saved, delete the date. Click **SAVE**.

⮑ Step 5: Plan Content Page

The **Outcome** has changed to "Cancelled."

	Name	Start Date	End Date	Status	Outcome	
▶	Employer Education and Training			Not Started	Cancelled	⋯

8.3.10 Cancel Sub-Goal

➲ Step 1: Plan Content Page

From the **Action Button** next to the relevant sub-goal, click **EDIT SUB-GOAL**.

➲ Step 2: Modify Sub-Goal Page

Select "Cancelled" from the **Outcome** drop-down menu and click **SAVE**.

● Step 3: Plan Content Page

The **Outcome** has changed.

8.3.11 Delete Sub-Goal

A sub-goal cannot be deleted if there are plan items associated with it.

➲ Step 1: Plan Content Page

From the **Action Button** next to the relevant sub-goal, click **DELETE SUB-GOA**L.

Program		Employment Action Plan	Status		Active	
Start Date		13/01/2021	Closed Date			
Owner		▬▬▬▬	Service Delivery Site		Fleming College CAAT - Cobourg	

Home   Common Assessment   Social Assistance   **Plan Content**   Plan Summary   Case Notes   Outcomes

Plan Content   ⭐ New Sub-Goal   ↻ 🖨

	Name of Sub-Goal	Start Date	End Date	Status	Outcome	

Specialized Services

				Add Plan Item…
				Edit Sub-Goal…

	Name of Sub-Goal	Start Date	End Date	Status	Outcome	Delete Sub-Goal…
▶	Specialized Services	15/01/2021	15/01/2021	Not Started	Cancelled	•••

➲ Step 2: Delete Sub-Goal Page

When asked to confirm the delete, click **YES**.

| | Employment Action Plan | Status | | Active | |
| | 13/01/2021 | Closed Date | | Fleming College C | |

Delete Sub-Goal: Life Stabilization - Employment Action Plan 70…

Are you sure you want to delete this sub-goal?

Yes   No

➲ Step 3: Plan Content Page

The deleted sub-goal will no longer appear.

8.3.12   Complete Sub-Goal

Prerequisite**:**

All associated plan items must have a defined outcome of 'Attained", "Not Attained", or "Cancelled"

➲ Step 1: Plan Content Page

From the **Action Button** next to the relevant sub-goal, click **EDIT SUB-GOAL**.

➲ Step 2: Modify Sub-Goal Page

Select the appropriate **Outcome** item from the drop-down menu and click **SAVE**.

➲ Step 3: Plan Content Page

The **Outcome** has changed.

8.3.13   Add Outcome

Prerequisite:

The pre-employment plan items defined for the Employment Action Plan must be completed. Case status must be Active. Employment Goals must be defined.

To add an Outcome to an Employment Action Plan the Add Outcome questionnaire must be completed, and all applicable responses must be defined. This includes responses to the outcome satisfaction questions (Questions # 16 – 20)

> ➢ A Confirmation message will be displayed to the user when they complete the Add Outcome questionnaire, to ensure they are ready to proceed with adding an outcome for the client.
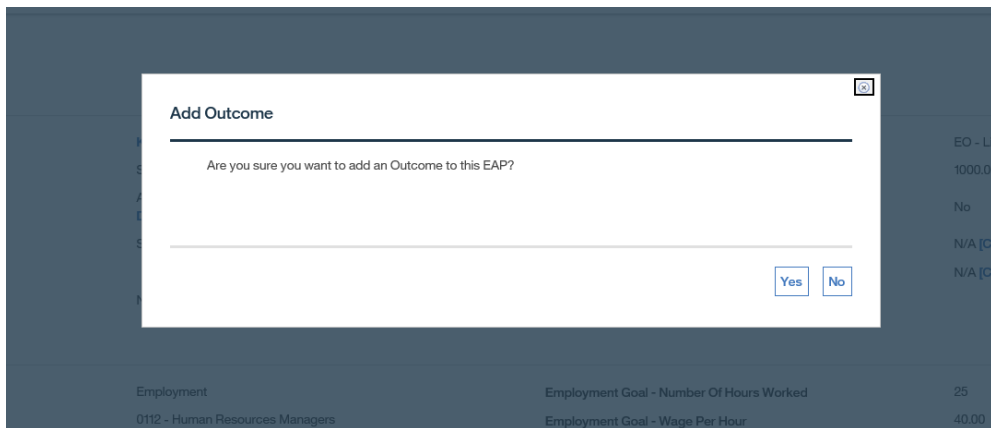
> ➢ When an Outcome has been added to the EAP, the client is considered a client served and the system will automate the 'Client Served' checkbox on the EAP homepage to 'yes'

➲ Step 1: Employment Action Plan Home Page

From the **Action Button**, click **ADD OUTCOME**.

➲ Step 2: Complete Add Outcome Questionnaire

Select the appropriate Performance Based Funding trigger and complete the Add Outcome questionnaire

Click **SAVE**.

![lightbulb icon] There will be skip logic within the questionnaire. You will be required to answer the questions applicable to the client's circumstance.

![lightbulb icon] When the Add Outcome questionnaire is completed, the system maps responses from the questionnaire to define the Employment Outcomes on the EAP homepage. The Employment Outcomes are:

- Employment Outcome
- Employment Outcome - NOC
- Employment Outcome - Wage Per Hour
- Employment Outcome - Number of Hours Worked
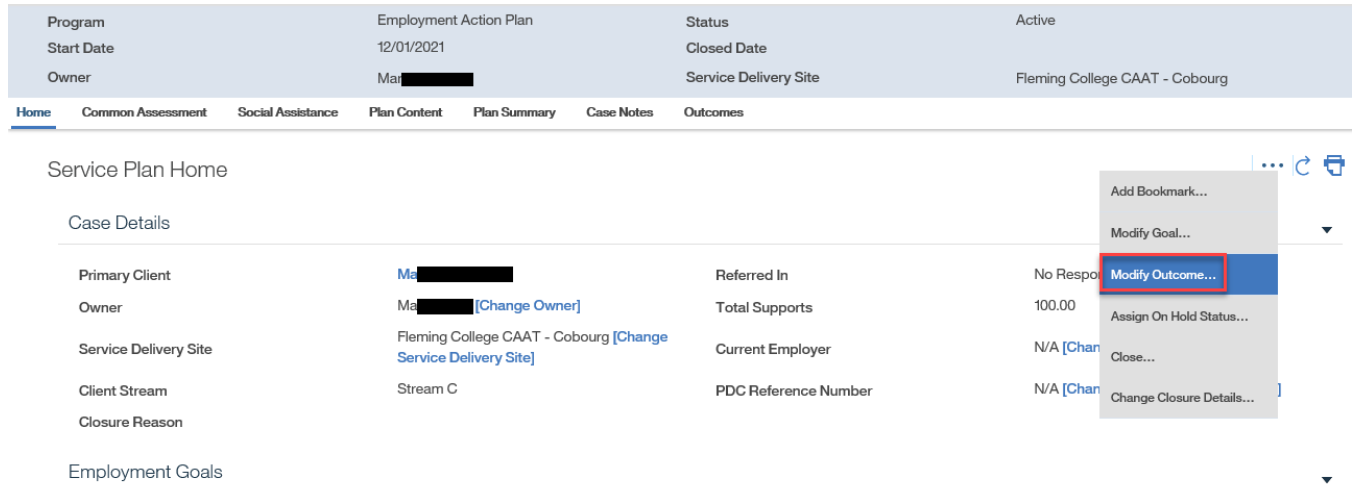
8.3.14 Modify Add Outcome Questionnaire

To modify responses to the Add Outcome Questionnaire, you can do so from the Employment Action Plan Home Page or Employment Action Plan Outcomes tab.

➲ Step 1: Employment Action Plan Homepage
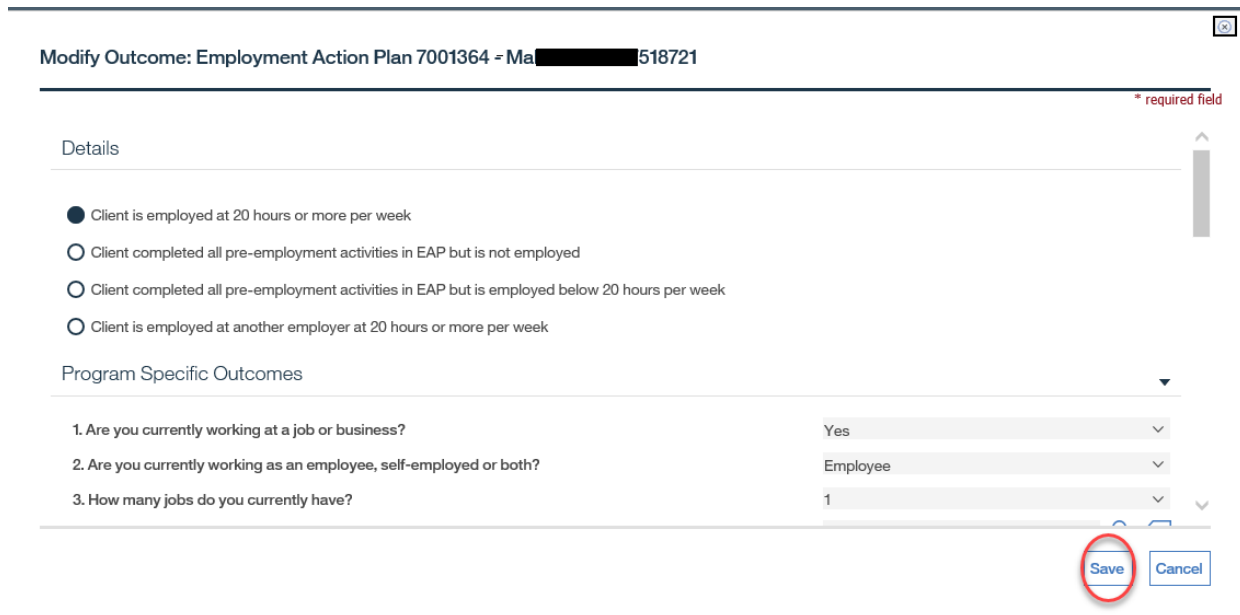
From the **Action Button**, click **MODIFY OUTCOME**.

➲ Step 2: Update the modifications to the Add Outcome Questionnaire

Click **SAVE**.

8.3.15   Complete Outcome Checkpoints

Prerequisite:

An outcome has been defined for the Employment Action Plan when the Add Outcome questionnaire is completed.

EAP Outcome Checkpoints are system generated. When an outcome is added to an Employment Action Plan, the system will automatically generate all monitoring checkpoints. When the Scheduled Date of an Outcome Checkpoint has occurred, the system will allow users to complete the assigned Outcome Checkpoint.

Pending reviews can also be found using the PENDING REVIEWS link from the **My Shortcuts** list on the Workspace.

To complete an Outcome Checkpoint

➲ Step 1: From the Employment Action Plan **Outcomes** tab, select a desired Outcome Checkpoint.

From the **Action Button**, click **EDIT CHECKPOINT**.

Program	Employment Action Plan	Status	Active
Start Date	12/01/2021	Closed Date	
Owner	Mar█████	Service Delivery Site	Fleming College CAAT - Cobourg

Home   Common Assessment   Social Assistance   Plan Content   Plan Summary   Case Notes   Outcomes

Case Outcomes

	Checkpoint Reason	Scheduled Start Date	Start Date	Outcome	
▶	Outcome at 12 months	12/01/2022			...
▶	Outcome at 6 months	12/07/2021			...
▶	Outcome at 3 months	12/04/2021			...
▶	Outcome at 1 month	12/02/2021	13/01/2021	Employed	Edit Checkpoint...
▶	EAP Outcome		12/01/2021	Employed	Add Attachment...

➲ Step 2: Outcome Checkpoint List Page

The outcome checkpoints associated to the Employment Action Plan will be displayed.

⮕ Step 3: Complete the Outcome Checkpoint Questionnaire

Select the appropriate Start Date, End Date and Outcome and complete the Outcome Checkpoint questionnaire.

Click **SAVE**.

⮕ Step 4: Add Attachments for Proof of Employment

Click **ADD ATTACHMENT** from the **Action Button**.

Select the **Document Type** from the available drop-down options and complete all required fields.

Click **SAVE**.

8.3.16 Modify Outcome Checkpoints

To modify an Outcome Checkpoint

➯ Step 1: Employment Action Plan **Outcomes** tab, select a desired Outcome Checkpoint
From the **Action Button**, click **EDIT CHECKPOINT**.

➯ Step 2: Update the modifications to the Outcome Checkpoint Questionnaire
Click **SAVE**.

8.3.17   Modify, Complete Review System Tabs

➲ Step 1: Workspace Page

Click **PENDING REVIEWS** from the **My Shortcuts** list.
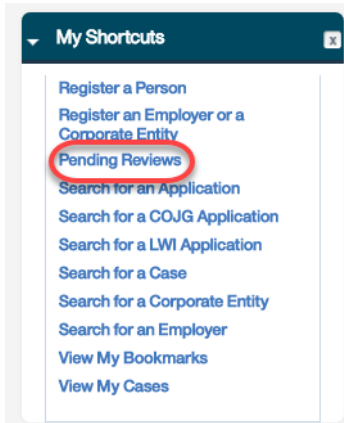
➲ Step 2: Pending Reviews Page

Click on the **REVIEW TYPE** for the appropriate review.

➲ Step 3: View Review Page

From the View Review page, select the **Action Button**, and click **EDIT**.
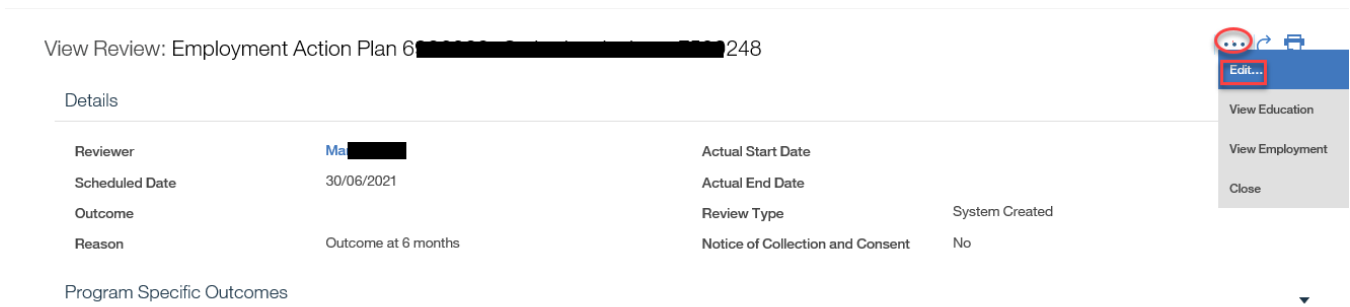
➲ Step 4: Modify Review Page

Modify the necessary information and click **SAVE**.

If a client is deceased and the date of death is entered in the system, the system will prevent the user from updating an existing completed review and creating subsequent reviews.

8.3.18   Close Employment Action Plan

If you close an Employment Action Plan, it cannot be reopened.
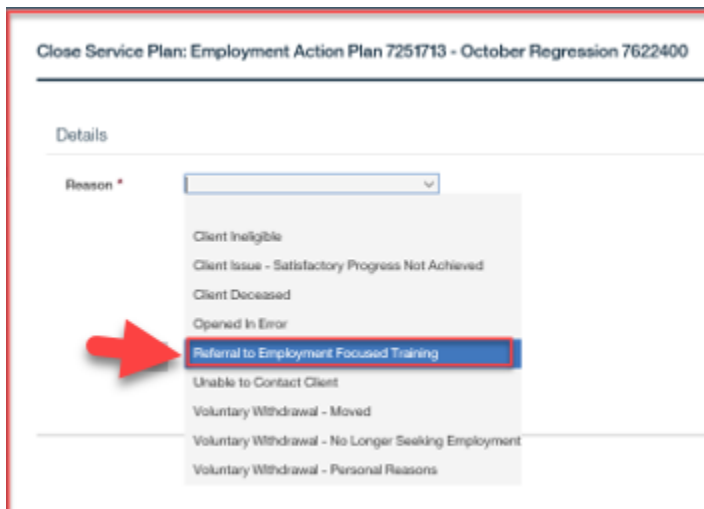
If the **Owner** of the Employment Action Plan is no longer an active user, they will be forced to change the **Owner** to an active CaMS user for the auto-generation of Outcome Checkpoint monitors.

An Employment Action Plan can be closed at any point during its lifecycle, but the closure reasons will vary depending on the timing of closure.

If the Employment Action Plan is closed prior to the completion of the defined pre-employment activities or prior to adding and outcome, the closure reasons available are:

- Voluntary Withdrawal - Personal Reasons
- Voluntary Withdrawal - Moved Outside of Catchment Area
- Voluntary Withdrawal - Moved Outside of Province
- Voluntary Withdrawal - Client Dissatisfied with Service
- Voluntary Withdrawal - No Longer Seeking Employment
- Referral to EO Training Program
- Opened in Error
- Client Ineligible
- Client Deceased
- Client Issue - Satisfactory Progress Not Achieved
- Unable to Contact Client

➢ When 'Referral to Employment Focused Training' is used as the EAP closure reason (*due to the client being referred to a defined employment focused training program*) and the case is closed, the client is considered a client served and the system will automate the 'Client Served' checkbox on the EAP homepage to 'yes'

If the Employment Action Plan closed at any point during the monitoring phase, the closure reasons available are:

- Client Ineligible
- Client Deceased
- Referral to EO Training Program
- Voluntary Withdrawal - Personal Reasons
- Voluntary Withdrawal - Moved Outside of Catchment
- Voluntary Withdrawal - Moved Outside of Province
- Voluntary Withdrawal - Client Dissatisfied with Service
- Voluntary Withdrawal - No Longer Seeking Employment

If the Employment Action Plan is closed after the completion of the 12-month Outcome Checkpoint, the closure reasons available are:

- Client Ineligible
- Client Deceased
- Completion
- Referral to EO Training Program
- Voluntary Withdrawal - Personal Reasons
- Voluntary Withdrawal - Moved Outside of Catchment
- Voluntary Withdrawal - Moved Outside of Province
- Voluntary Withdrawal - Client Dissatisfied with Service
- Voluntary Withdrawal - No Longer Seeking Employment
- Unable to Contact Client

➲ Step 1: Employment Action Plan Home Page

From the **Action Button**, click **CLOSE**.

➲ Step 2: Close Employment Action Plan Page

Select the appropriate Closure Reason.

Click **SAVE**.

The **Closure Reason** cannot be changed once the EAP has been closed with a reason of "Opened in Error."

If **Comments** need to be added related to the closure reason, this can be entered in the Change Closure Details page. To access the Change Closure Details page, from

the Employment Action Plan Home Page, select the **Action Button** and click **CHANGE CLOSURE DETAILS**.

➲ Step 3: Close Employment Action Plan Page

Click **YES** to close the Employment Action Plan.
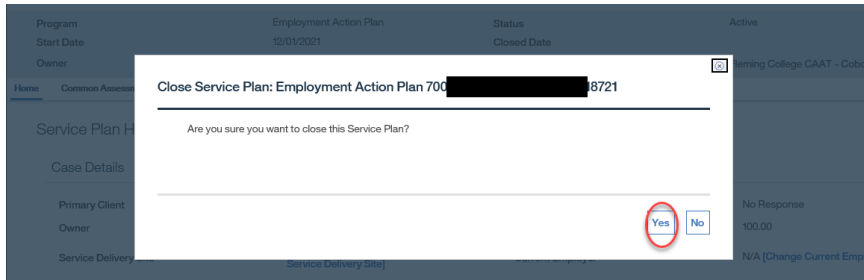
8.5   Business System Rule Appendix

8.5.1 IES Client Profile Creation and Update

➢ When a Common Assessment record is submitted to CaMS the following data will be mapped to the client profile Person page for client registration or update purposes
  ▪ First Name, Last Name, I Identify As, Date of Birth, Registration Date, Status in Canada, Date Arrived in Canada, Immigrated to Canada?, Preferred Language, Marital Status, SIN, Primary Phone Number, Alternative Phone Number, Apt/Suite, Street, City, Province/State, Postal/Zip Code, Country, Email Address, Country of Birth, Newcomer, Deaf, Deafblind, Person with Disability, Francophone, ODSP, Youth, Racialized Person, First Nations, Métis, Inuit

8.5.2 Creating Employment Action Plan(s)

➢ Employment Ontario Home Page – Common Assessment Tab

Actors

  ▪ Service Provider Manager
  ▪ Service Provider Caseworker
  ▪ Service Provider Administrator

➲ The Create EAP action will only be available for Common Assessment records that have not been previously used to create an EAP.

➲ If the CA record has been used to create an EAP, the system will not allow any further action to the CA record.

➲ If CaMS is receiving API data for an EAP that includes a Common Assessment record that is already associated to a different EAP, the system will not complete the request successfully

➲ If CaMS is receiving API data for an EAP that includes a Common Assessment record that is not in a 'processed' status, the system will not complete the request successfully

➢ Create Employment Action Plan Page

Actors

- Service Provider Manager
- Service Provider Caseworker
- Service Provider Administrator

➲ If the following data is captured in a submitted CA record, it will be mapped to this page

  o Employment Goal – Number of Hours Worked

  o Employment Goal – Wage Per Hour

  o Employment Goal – NOC

➲ If the CA record has 'Not Sure' or 'Prefer Not to Say' responses for the values above, the EAP can be created but a user will need to complete these variables prior to adding an Outcome to an EAP.

➲ A user can cancel the creation process using the cancel button. If the EAP creation is cancelled, the CA record will continue to be available for EAP creation. See Step 1.

➲ A Client can only have one EAP Plan within an EO Case with a status of Open or Active at any one time. The system will display an error message to a caseworker in this situation preventing them from completing the EAP creation process.

➲ A Client cannot be simultaneously enrolled in an EAP and one of the following service plan types: ES, YJC, YJC Summer, YJL, ESP, OEAS, SE, SAO with a status of Open/Approved/Active. The system will display an error message to a caseworker in this situation preventing them from completing the EAP creation process.

➲ The Date of Death on a client's Person record must be blank for an EAP to be created
➲ Upon save, the system validates the data entered and displays error messages, in terms of which fields were not completed or contained invalid data

➲ When an EAP is created

  o A new EAP Plan with a unique identifier is created.

  o The Primary Client field is pre-populated with the participant's name.

  o The Date Created field is populated with the system date and cannot be changed

  o The status of the Service Plan is Open

➢ Employment Action Plan Home Page

Program	Employment Action Plan	Status	Open
Start Date	21/12/2020	Closed Date	
Owner	Ma███████	Service Delivery Site	Fleming College CAAT - Cobourg

Home Common Assessment Plan Content Plan Summary Case Notes Outcomes

Service Plan Home

Case Details

Primary Client	Jim███████	Referred In	Ontario Disability Support Program
Owner	███████ [Change Owner]	Total Supports	
Service Delivery Site	Fleming College CAAT - Cobourg [Change Service Delivery Site]	Current Employer	N/A [Change Current Employer]
Client Stream	Stream A	PDC Reference Number	N/A [Change PDC Reference Number]
Closure Reason			

Employment Goals

Employment Goal	Employment	Employment Goal - Number Of Hours Worked	22
Employment Goal - NOC	0013 - Senior Managers - Financial, Communications and Other Business Services	Employment Goal - Wage Per Hour	22.00

Employment Outcomes

Employment Outcome		Employment Outcome - Number Of Hours Worked	N/A
Employment Outcome - NOC	N/A	Employment Outcome - Wage Per Hour	N/A

Actors

- Service Provider Manager
- Service Provider Caseworker
- Service Provider Administrator

➲ To link a PDC to an EAP, use the Change PDC Reference Number action

➲ To link an Employer to the Current Employer field, use the Change Current Employer action
  o This field is meant to represent the Employer a client is associated to upon entry into the program. The Caseworker has the ability to add this information during the EAP creation, but if it is missed in that process, they have the ability to update the information here

➲ To add an Outcome to an EAP, the Employment Goals cluster must be completed
  o Employment Goal

  o Employment Goal – Number of Hours Worked

  o Employment Goal – Wage Per Hour

  o Employment Goal – NOC

➲ The Employment Outcome cluster is derived from responses with the Add Outcome Questionnaire. See Add Outcome section for more information

8.5.3 Adding Sub-Goal(s)
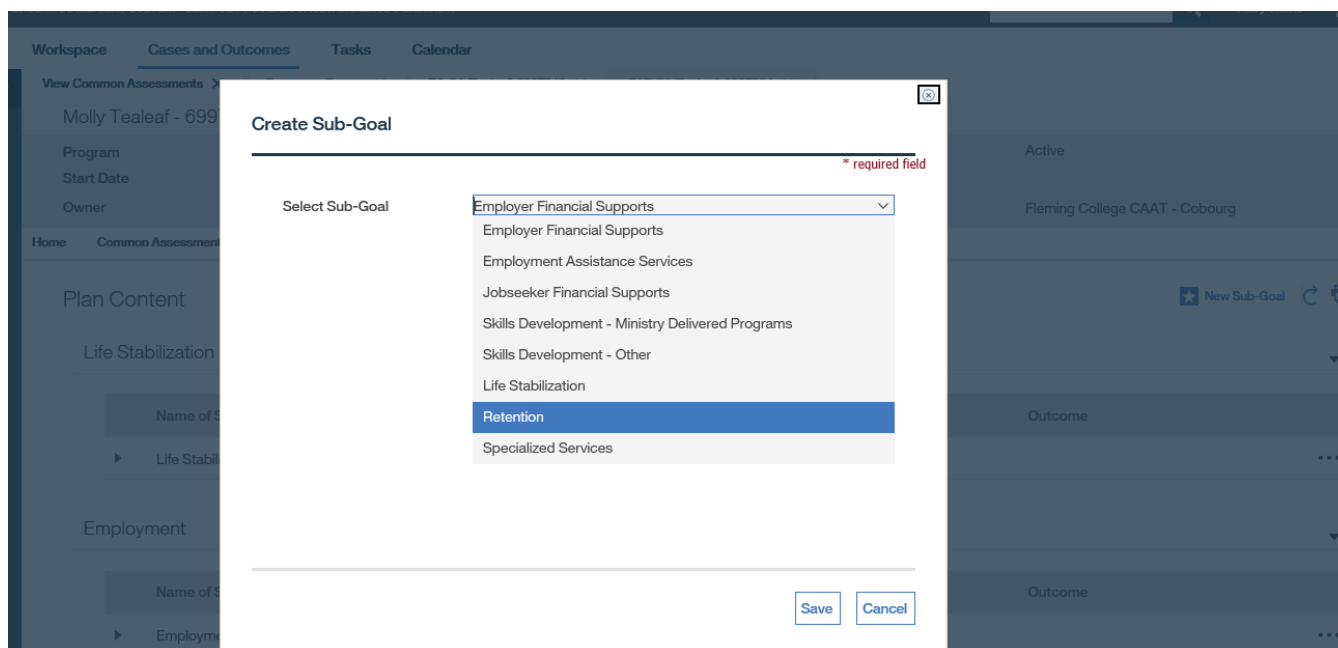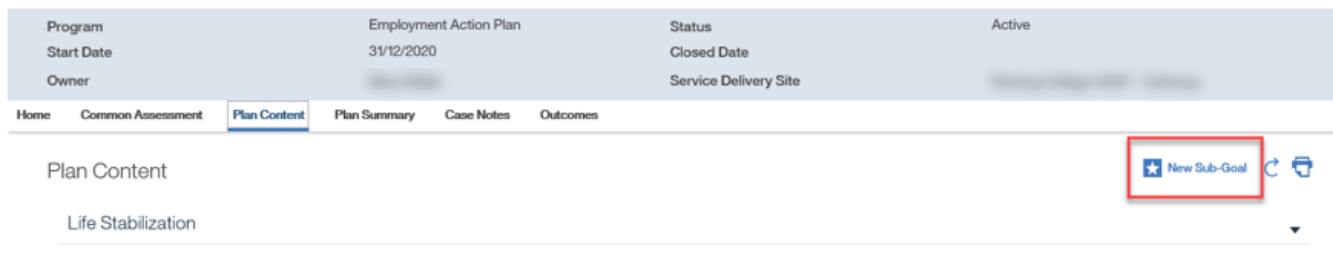
Actors

- Service Provider Manager
- Service Provider Caseworker
- Service Provider Administrator

➲ To cancel the creation of a Sub Goal, use the cancel button. The system will exit from the Create Sub Goal page and return to the Plan Content page

➲ The system will only allow 1 non closed sub goal of a specific type at any given time.

➲ The Service Plan EAP must be in an **Open** or **Active** status to be able to add Sub Goals.

⮊ Sub Goals cannot be added to closed EAP's. An appropriate message is displayed to the user if they attempt to add more Sub Goals after case closure

o The status of the newly added Sub-Goal is **Not Started**

8.5.4 Adding Plan Items to Sub-Goals
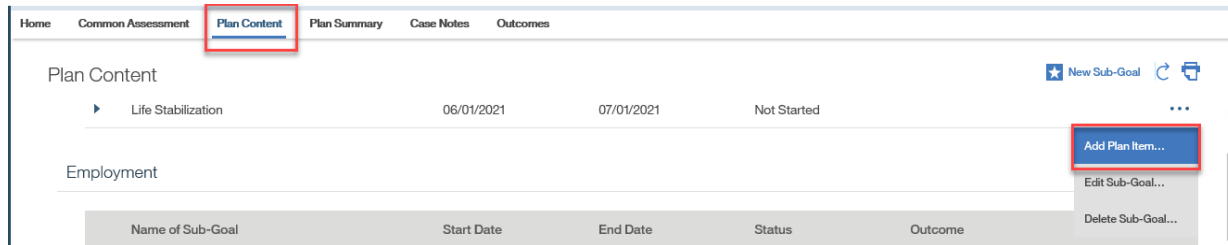
Actors

▪ Service Provider Manager

- Service Provider Caseworker
- Service Provider Administrator

➲ To cancel the creation of a Plan Item, use the cancel button. The system will exit from the Add Plan Item page and return to the Plan Content page

➲ If the system detects that no plan item type selected, by the means of the associated checkbox, it displays an error message regarding the need to select a plan item before proceeding

➲ The Service Plan EAP must be in an **Open** or **Active** status to be able to add Plan Items.

➲ If an Outcome already exists for the Sub Goal, users will be presented with an error message informing them that they cannot add a Plan Item to a Sub-Goal when the Sub Goal outcome is already set

➲ Plan Items cannot be added to closed EAP's. An appropriate message is displayed to the user if they attempt to add more Plan Items after case closure

➲ The status of the newly added Plan Item is **Not Started**

8.5.5 Modify, Complete Plan Item

Actors

- Service Provider Manager
- Service Provider Caseworker
- Service Provider Administrator

➲ To cancel the modification of a Plan Item, use the cancel button. The system will exit from the Modify Plan Item page and return to the Plan Content page

➲ Actual Start and End Dates cannot be greater than current date

➲ Actual Start Date cannot be greater than the Actual End Date

➲ Actual End Date cannot be prior to the Actual Start Date

➲ Actual Start Date cannot be blank if Actual End Date entered

➲ Actual Cost is mandatory for Job Seeker Financial Support plan items, and Employer Financial Supports plan items when the Actual End Date is entered and Outcome = Attained or Not Attained

➲ Actual Cost must be between 0.00 and 100,000.00

➲ Paid Date cannot be greater than the current date

➲ The Service Delivery Site will be defaulted to the Service Delivery Site the EAP is associated to. If needed, this can be changed to another SDS by the user

➲ If an **Actual Start Date** is specified, the system automatically changes the Plan Item status to **In Progress**

➲ If an **Actual End Date** and an **Outcome** are specified, the system automatically changes the Plan Item status to **Completed**

➲ If an **Actual Start Date** is specified, the system automatically changes the **Actual Start Date** of the parent Sub-Goal to align with the Plan Item Start date

➲ If an **Actual End Date** is specified, the system automatically changes the **Actual End Date** of the parent Sub-Goal

➲ If there are multiple Plan Items per Sub Goal, the Sub Goal will use the earliest Plan Item Start Date as the Sub Goal Start date and the latest Plan Item End Date as the Sub Goal End Date

➲ If invalid or incomplete data is entered, system displays an error message indicating what needs to be resolved

➲ Outcome cannot be blank if Actual End Date is entered

➲ Outcome cannot be 'Cancelled' if Actual Start/ End Dates entered

➲ Cannot change outcome of Plan Item when parent subgoal's Outcome is 'Cancelled'

➲ Outcome cannot be Attained / Not Attained if Actual End Date is blank

➲ Rationale Field is mandatory for plan items associated to the Job Seeker Financial Support sub goal, and the Employer Financial Supports 'Employer - Job Accommodation' plan items when the Actual End Date is entered

➲ Comments Field is mandatory for Custom Basic Plan Items, the 'Referral to Other Ministry Delivered or Funded Programs' plan item and the 'Skills Development – Other plan item' when the Actual Start Date is entered

➲ **Comments** field can only accommodate 500 characters

(Additional rules for Placement and/or Job Trial Plan Items)

➲ For Placement and Job Trial plan item types that require employer association, the employer must be registered in the system and must also be assigned to a Corporate Entity. If the Employer is not registered, refer to the **Employer Management** chapter of the EOIS CaMS user guide for employer registration activities.

➲ 'Employment Hours per Week' must be between 1 and 99 hours inclusive

➲ Employer, Job Title, Placement Category, Employment Hours Per Week, Wage Amount, NAICS, and NOC are mandatory if Actual **Start** Date and Actual **End** Date are specified

  o If one of the fields Employer, Job Title, Placement Category, Employment Hours Per Week, Wage Amount, NAICS or NOC is blank, while an Actual Start Date was entered, the appropriate error message is displayed

➲ Employer Satisfaction is mandatory if Actual End Date is specified

➲ Employment Hours per Week & Wage Per are mandatory if Wage Amount is specified

➲ Wage Amount must be between $1 to $99.99 inclusive.

➲ All Placement Information is mandatory if the Outcome defined is Attained or Not Attained.

➲ Ready for Review checkbox signals to the SSM Manager that the plan item is ready for review and submission to the Ministry. The Caseworker should check this box when the plan item is complete, and ready for SSM review and submission to the Ministry." If the

Ready for Review checkbox is defined without the plan item data being complete the system will display an appropriate error message indicating the need for a completed plan item prior to using this checkbox

➲ Resubmit for Review checkbox signals to the SSM Manager that a plan item that has previously been rejected has been updated and is ready for review and submission to the Ministry. The Caseworker should check this box when the plan item is ready for resubmission to the SSM and the Ministry." If the Ready for Review checkbox is defined without the plan item data being complete the system will display an appropriate error message indicating the need for a completed plan item prior to using this checkbox

For list of available Plan Items please see the appendix

8.5.6 Deleting Plan Item(s)

		Name	Start Date	End Date	Status	Outcome	
▶		Employer - Job Accomodation	24/12/2020	24/12/2020	Completed	Attained	•••
▶	❗	Employer - Job Placements with Financial Supports	24/12/2020		In Progress		Add Attachment…
▶		Employer - Job Trials with Financial Supports	30/12/2020	30/12/2020	Completed	Not Attained	Edit Plan Item… **Delete Plan Item…**

Actors

- Service Provider Manager
- Service Provider Caseworker
- Service Provider Administrator

⊃ A Plan Item cannot be deleted while the status is 'In Progress' or 'Completed'

⊃ To delete a plan item, the Actual Start Date, Actual End Date, and Outcome need to be removed (if they've been defined)

8.5.7 Cancelling Plan Item(s)

Actors

- Service Provider Manager
- Service Provider Caseworker
- Service Provider Administrator

⊃ Outcome cannot be set to Cancelled if Actual Start and/or Actual End Date is entered

⊃ Actual Cost must be null when cancelling plan items

8.5.8 Completing Sub-Goal(s)

Actors

- Service Provider Manager
- Service Provider Caseworker
- Service Provider Administrator

➲ System will automatically update the Sub-Goal status based on the status of associated Plan Items.
  o If the status of all plan items within sub-goal is **Not Started**, then system sets the sub-goal status to **Not Started**.
  o If at least one plan item status within sub-goal is set to **In Progress** (and **no** plan item status is set to Completed), then system sets the sub-goal status to **In Progress**.
  o If at least one plan item status within sub-goal is set to **Completed,** then system sets sub-goal status to **Completed**
  o If **Sub-Goal Outcome** is set to **Cancelled,** then all associated Plan Items will be updated to an **Outcome** of **Cancelled** and **null** Actual Start and End Dates

➲ Sub-goal Outcome cannot be set before a Plan Item has been added
➲ Sub-goal Outcome cannot be set before associated Plan Items have an Outcome
➲ Sub-goal Outcome cannot be set if all associated Plan Items have a "Cancelled" Outcome

8.5.9 Cancelling Sub-Goal(s)

Actors

- Service Provider Manager
- Service Provider Caseworker
- Service Provider Administrator

⮕ System changes the Outcome of any non-cancelled Plan Items to 'Cancelled' and clears their Actual Start and End Dates

8.5.10   Activating Employment Action Plan(s)

Actors

- Service Provider Manager
- Service Provider Caseworker
- Service Provider Administrator

➲ The Employment Action Plan must be in an Open status and have at least one sub goal and plan item defined before it can be activated.

➲ To cancel the EAP activation, use the cancel button. The system will exit from the Activate EAP page and return to the EAP Homepage

➲ When activated, the system will automate the creation of the Plan Summary.

➲ If the Accepted Date is left blank when activating the EAP, the EAP status will change to Approved and a user will need to add a Date Accepted in the client's Plan Summary to activate the EAP accordingly

➲ Once the EAP status has been changed to Active it cannot go back to an Open Status

 For Active On-Hold

➲ A client cannot move onto Outcomes while the EAP is in an 'Active On-Hold' Status

➲ A client's EAP cannot be closed with the closure reason 'Completion' while the EAP is in an 'Active On-Hold' Status.

8.5.11 Modifying Plan Summary

Actors

- Service Provider Manager
- Service Provider Caseworker
- Service Provider Administrator

⮫ A Plan Summary cannot be created if there is already a Plan Summary on the EAP with a status of 'Issued' or Accepted

⮫ A Plan Summary cannot have a Date Accepted, Date Rejected and/or Date Cancelled at the same time. The system will only allow for one value per Plan Summary to be defined at a given time

⮫ If Date Rejected is entered, a Rejection Reason must be specified

⮫ If a Rejection Reason or Rejection Comments are entered, a Date of Rejection must also be entered

⮫ If Date Cancelled is entered, a Cancellation Reason must be specified

⮫ If a Cancellation Reason or Cancellation Comments are entered, a Date of Rejection must also be entered

8.6.1 Adding an Outcome

Actors

- Service Provider Manager
- Service Provider Caseworker
- Service Provider Administrator

⟳ Employment Goals must be defined for the Add Outcome action to be available. The employment Goals are:

  o Employment Goal

  o Employment Goal – NOC

  o Employment Goal – Number of Hours Worked

  o Employment Goal – Wage Per Hour

⟳ All Plan Items must be completed with a defined outcome for the Add Outcome action to be available

  o The exception to this the Job Placement plan items. The Add Outcome action is available to users if the Placement is still incomplete

➲ Employment Outcomes cluster values are mapped using responses from the Add Outcome Questionnaire. The Employment Outcomes cluster mapping is below:

- Employment Outcome

  ▪ Derived from the responses to question # 1, question #14, and question 15

  ▪ If the response to question #1 is Yes, then the Employment Outcome is displayed as Employed

  ▪ If the response to question # 1 is No, and the response to question 14 is Fulltime then Employment Outcome is displayed as Not in Labour Force

  ▪ If the response to question # 1 is No, and the response to question 14 is Part Time or N/A (blank), then the response to question # 15 will defined the outcome displayed. The defined outcomes to be displayed from Q15 are below:

  ➢ Q15 - Which of the categories best describes your current situation?

    ▪ Employed but currently on a leave (e.g., vacation, maternity leave, seasonal layoff but expecting to return, etc.) (If yes, status defined as "Employed")

    ▪ Unemployed and looking for work (If yes, status defined as "Unemployed")

    ▪ Unemployed with an employment offer (If yes, status defined as "Unemployed")

    ▪ Unemployed and not looking for work (If yes, status defined as "Not in Labour Force")

    ▪ Unemployed and unable to work (If yes, status defined as Not in Labour Force)

- Employment Outcome – NOC:

  ▪ Derived from the response to question # 4.

  ▪ The field will display the NOC code captured within the response for question #4

  ▪ If question number 4 was skipped due to skip-logic, then Employment Outcome - NOC displayed as N/A

- Employment Outcome – Number of Hours Worked:

  ▪ The field will display the response to question # 7.

- If question number 7 was skipped due to skip-logic, then Employment Outcome - Number of Hours Worked displayed as N/A

- If multiple jobs are defined within the EAP Outcome Questionnaire then the details for Job 1 are included in this mapping

- Employment Outcome – Wage Per Hour:

  - The field will display the response to question # 8.

  - If question number 8 was skipped due to skip-logic, then Employment Outcome – Wage Per Hour displayed as N/A

  - If multiple jobs are defined within the EAP Outcome Questionnaire then the details for Job 1 are included in this mapping

➲ The Questionnaire satisfaction questions (Questions # 16 – 20) are mandatory at the when adding an Outcome to an EAP.

Home	Common Assessment	Social Assistance	Plan Content	Plan Summary	Case Notes	Outcomes

Case Outcomes

Job1 Details

6a. How would you best describe the nature of your job?	Permanent Job
7a. Excluding overtime, on average, how many paid hours do you usually work per week?	20.0
8a. What is your hourly wage [including tips and commissions], before taxes and other deductions?	15.00
9a. Are you looking to change your current employment in foreseeable future?	Not Sure
10. When is the last time you were unemployed?	25/10/2021
11. How many times have you changed employment since you were last unemployed?	1
12. Are you currently attending a school, college, university, apprenticeship or other training program?	No
13. How would you best describe the education or training you are attending?	N/A
14. Are you enrolled as a full-time or part-time student?	N/A
15. Which of the categories best describes your current employment situation?	N/A
16. You got the kind of services you think you needed	Strongly Agree
17. The services you received were the right approach for helping you	Strongly Agree
18. If you were to seek help again, you would seek it from us	Strongly Agree
19. You are likely to recommend the program to someone looking for similar services as those you received	Strongly Disagree
20. You did not need to seek additional employment or training related services on your own	Strongly Agree

➲ To 'Trigger' the Outcome Checkpoint Questionnaire sequence, the following rules must be maintained:

  o The Questionnaire must be completed in accordance with the appropriate skip logic criteria. For skip logic variables please see appendix

o The response within the Detail section must match the Program Specific Outcomes defined. Some examples of this below:

- If Details selection indicates that the *"Client is employed at 20 or more hours per week"* then the questionnaire responses must align with this.

  - Ex. The Primary job would need a response of 20 or more hours per week for question 7 to align with the selected Details.

- If Details selection indicates that the *"Client completed all pre-employment activities in EAP but is not employed"* then the questionnaire responses must align with this.

  - Ex. Question 1 would need a response of No to indicate the client is not currently working at a job or business.

- If Details selection indicates that the *"Client completed all pre-employment activities in EAP but is employed below 20 hours per week"* then the questionnaire responses must align with this.

  - Ex. The Primary job would need a response of below 20 hours per week for question 7 to align with the selected Details

- If Details selection indicates that the *"Client is employed at another employer at 20 hours or more per week"* then the questionnaire responses must align with this.

  - Ex. The Employer at Entrance field and the Employer at Outcome on the EAP homepage must be defined and must be different Employers. The Primary job in the questionnaire would need a response of 20 or more hours per week for question 7 to align with the selected Details.

➲ When the Outcome details have been completed, the system will autogenerate the 1month, 3month, 6month, and 12month Outcome Checkpoints for the EAP

8.6.2 Complete Outcome Checkpoints

Actors

- Service Provider Manager
- Service Provider Caseworker
- Service Provider Administrator

⊃ The system will restrict a user from completing a checkpoint until the checkpoint scheduled date has been reached

⊃ Scheduled date is read-only and based on the date used when adding an Outcome +1 month, 3month, 6month, and 12 months

⊃ The Actual Start Date is the date that the assigned EO caseworker begins attempts to contact the client for the purposes of collecting the outcome

⊃ The Actual End Date is the date the assigned EO caseworker receives confirmation of the outcome status of the SSD by the client

⊃ Actual Start and End Dates cannot be greater than current date

⊃ Actual Start Date cannot be greater than the Actual End Date

⊃ Actual End Date cannot be prior to the Actual Start Date

⊃ Actual Start Date cannot be blank if Actual End Date entered

⊃ Actual Start Date and Actual End Date cannot be prior to the EAP Start Date

⊃ Outcome cannot be blank if Actual End Date is entered

- ➲ For Question.7 *"Excluding overtime, on average, how many paid hours do you usually work per week?"* Employment Hours per Week' must be between 0.25 and 60.99 hours inclusive

- ➲ For Question.8 *"What is your hourly wage [including tips and commissions], before taxes and other deductions?"* Wage Amount must be between 12.20 to 50.99 inclusive.

- ➲ If value for Question.3 is >1, complete response to QUESTION.6 through QUESTION.9 for primary job, then come back to QUESTION.6 and complete response through QUESTION.9 for the second job. Repeat process for each additional job.

- ➲ The Questionnaire satisfaction questions (Questions # 16 – 20) are mandatory at the 3months and 12months Outcome Checkpoints.

- ➲ The Questionnaire must be completed in accordance with the appropriate skip logic criteria

    - ▪ For skip logic variables please see Appendix

- ➲ Milestone Achieved checkbox signals to the SSM Manager that the checkpoint is ready for review and submission to the Ministry.

    - ▪ This Milestone Achieved checkbox is automated to yes when the Outcome Checkpoint's 'Outcome' value is defined as Employed

    - ▪ If the Outcome Checkpoint's 'Outcome' value is not Employed, users will not have the ability click this checkbox

- ➲ Resubmit Milestone checkbox signals to the SSM Manager that a checkpoint that has previously been rejected has been updated and is now ready to be reviewed and resubmitted to the Ministry. The Caseworker should check this box when the Checkpoint is ready for resubmission to the SSM and the Ministry." If the Resubmit Milestone checkbox is defined without the Outcome Checkpoint data being complete the system will display an appropriate error message indicating the need for a completed Outcome Checkpoint prior to using this checkbox

- ➲ Reviewer must be a user from the SSM organization who has a role in CaMS

- ➲ Responses from the previous completed Outcome Checkpoint will auto-populate the responses for the subsequent Outcome Checkpoint allowing the caseworker to quickly update the necessary variables that may have changed for the client

- Ex. The responses from the 1month Outcome Checkpoint will prepopulate the 3month Outcome c

8.6.3 Close Employment Action Plan

Close Service Plan: Employment Action Plan 7494660 - Inclusion group Tests 7713282

* required field

Details

Reason *

Client Deceased

Client Ineligible

Client Issue - Satisfactory Progress Not Achieved

Opened In Error

Referral to EO Training Program

Unable to Contact Client

Voluntary Withdrawal - Moved Outside of Catchment

Voluntary Withdrawal - Moved Outside of Province

Voluntary Withdrawal - No Longer Seeking Employment

Voluntary Withdrawal - Personal Reasons

Voluntary Withdrawal - Client Dissatisfied with Service

Save   Cancel

Actors

- Service Provider Manager
- Service Provider Caseworker
- Service Provider Administrator

➲ EAP cannot be closed until an Employment Outcome has been set

➲ If closure reason is Client Deceased, a Date of Death must be entered on the Person homepage before the EAP can be closed.

➲ An EAP cannot be reopened once it has been closed

➲ The system will only allow modifications to the Closure Reason and Closure Comments once an EAP has been closed.

- ➲ If the Closure Reason used is Opened in Error, the Closure Reason cannot be changed
- ➲ When the 12month Outcome Checkpoint is finalized, regardless of the closure reason selected the EAP is considered completed

8.6   EAP Plan Item list Appendix

EOIS-CaMS EAP Subgoals	EOIS-CaMS EAP Plan Items
Life Stabilization	Basic Needs - Crisis resolution
Life Stabilization	Basic Needs - Housing
Life Stabilization	Basic Needs - Financial support
Life Stabilization	Basic Needs - Food security
Life Stabilization	Basic Needs - Transportation
Life Stabilization	Basic skills - Self-efficacy
Life Stabilization	Health Supports - Primary care and ongoing medical concerns
Life Stabilization	Health Supports - Mental health and addictions
Life Stabilization	Community Supports - Dependent care
Life Stabilization	Community Supports - Cultural connections
Life Stabilization	Community Supports - Cultural transition
Life Stabilization	Community Supports - Justice and legal support
Life Stabilization	Community Supports - Newcomer services
Life Stabilization	Custom Basic Plan Item
Employment Assistance Services	Resource and information services - general
Employment Assistance Services	Resource and information services - digital services
Employment Assistance Services	Client counselling
Employment Assistance Services	Employability skills training
Employment Assistance Services	Career exploration, planning and management
Employment Assistance Services	Job search
Employment Assistance Services	Job matching and development

EOIS-CaMS EAP Subgoals	EOIS-CaMS EAP Plan Items
Employment Assistance Services	Volunteering
Employment Assistance Services	Employer - Job trials
Employment Assistance Services	Employer - Job placements
Employment Assistance Services	Employer Coaching
Employment Assistance Services	Job coaching
Employment Assistance Services	Referral to External Self-employment/Entrepreneurship Services
Employment Assistance Services	Provision of SSM In-Service Self Employment Services
Employment Assistance Services	Custom Basic Plan Item
Skills Development - Ministry Delivered Programs	Referral to Better Jobs Ontario Training
Skills Development - Ministry Delivered Programs	Referral to Apprenticeship
Skills Development - Ministry Delivered Programs	Referral to Feepayer Training
Skills Development - Ministry Delivered Programs	Referral to Ontario Job Creation Partnership Training
Skills Development - Ministry Delivered Programs	Referral to SkillsAdvance Ontario
Skills Development - Ministry Delivered Programs	Referral to Micro-credentials
Skills Development - Ministry Delivered Programs	Referral to Other Ministry Delivered or Funded Programs
Skills Development - Other	Referral to Literacy and Basic Skills
Skills Development - Other	Referral to Canada-Ontario Job Grant
Skills Development - Other	Referral to Ontario Bridge Training Program

EOIS-CaMS EAP Subgoals	EOIS-CaMS EAP Plan Items
Skills Development - Other	Referral to Post-secondary Education
Skills Development - Other	Referral to Secondary Education
Skills Development - Other	Referral to Government Services - Federal
Skills Development - Other	Referral to Government Services - Municipal
Skills Development - Other	Referral to Occupational Skills training
Skills Development - Other	Referral to French as a Second Language training
Skills Development - Other	Referral to English as a Second Language training
Skills Development - Other	Referral to Academic Upgrading
Skills Development - Other	Other
Jobseeker Financial Supports	Job seeker - Accommodation needs - assistive devices and adaptive technology
Jobseeker Financial Supports	Job seeker - Accommodation needs - job-specific communication skills training
Jobseeker Financial Supports	Job seeker - Accommodation needs - on-the-job supports
Jobseeker Financial Supports	Job seeker - Diagnostic assessment
Jobseeker Financial Supports	Job seeker - Certification charges
Jobseeker Financial Supports	Job seeker - Academic credential or professional accreditation assessment
Jobseeker Financial Supports	Job seeker - Language skills assessment
Jobseeker Financial Supports	Job seeker - Short-term skills training
Jobseeker Financial Supports	Job seeker - Emergency/infrequent child care
Jobseeker Financial Supports	Job seeker - Employment-related transportation
Jobseeker Financial Supports	Job seeker - Work clothing and/or grooming
Jobseeker Financial Supports	Job seeker – Employment-related special equipment and supplies
Jobseeker Financial Supports	Job seeker - Translation of international academic documents
Jobseeker Financial Supports	Job seeker - Specialized hardware
Employer Financial Supports	Employer - Job trials - with Financial Supports
Employer Financial Supports	Employer - Job placement - with Financial Supports

EOIS-CaMS EAP Subgoals	EOIS-CaMS EAP Plan Items
Employer Financial Supports	Employer - Job accommodation
Retention	Retention support planning
Retention	Accessible workplace consultation for clients with a disability
Retention	Ongoing job coaching
Retention	On-the-job training
Retention	Mentoring
Retention	Job retention crisis response
Retention	Supporting changes in work activities and supervision
Retention	Employer retention coaching
Retention	Additional services to find another job
Retention	Custom Basic Plan Item
Specialized Services	Employment services for people with disabilities
Specialized Services	Workplace consultation for clients with a disability (ies)
Specialized Services	Employer job carving
Specialized Services	Employer education and training
Specialized Services	Culturally-appropriate employment services for Indigenous peoples
Specialized Services	Employment services for Francophones
Specialized Services	Employment services for youth with higher support needs
Specialized Services	Employment services for newcomers
Specialized Services	Custom Basic Plan Item

8.7 Employment Status Questionnaire (ESQ) and Skip-logic Appendix

Field	Response Options (if applicable)	Skip logic
1. Are you currently working at a job or business ?	Yes	Go to #2
	No	Go to #12
2. Are you currently working as an employee, self-employed or both?	Employee	Go to #3
	Self-employed	
	Both	
3. How many jobs do you currently have?		Go to #4
4. If value for Q.3 is 1- How would you describe the work you do, i.e. your job title? If value for Q.3 is >1- How would you describe the work you do, i.e. your job title in your primary job		Go to #5
5. If value for Q.3 is 1- How would you describe the sector you work in? If value for Q.3 is >1- How would you describe the sector you work in your primary job?		Go to #6
Prompt for Client: If value for Q.3 is >1, complete response to Q.6 through Q.9 for primary job, then come back to Q.6 and complete response through Q.9 for the second job. Repeat process for each additional job.		
6.How would you best describe the nature of your job?	Permanent Job	Go to #7
	Seasonal Job	

	Temporary, term or contract job (non-seasonal)	
	Casual Job	
	Other (Specify)	
7. Excluding overtime, on average, how many paid hours do you usually work per week?	Numeric	Go to #8
	Not Sure (checkbox)	
8. What is your hourly wage [including tips and commissions], before taxes and other deductions?	Cost Numeric	Go to #9
	Prefer not to say (checkbox)	
9. Are you looking to change your current employment in foreseeable future?	Yes	Go to #10
	No	
	Not Sure	
10. When is the last time you were unemployed?		Go to #11
11. How many times have you changed employment since you were last unemployed?		Go to #12
12. Are you currently attending a school, college, university, apprenticeship or other training program?	Yes	Go to #13
	No	(If Question #1 = Yes, then go to #16) (If Question #1 = No, then go to #15)

13. How would you best describe the education or training you are attending?	Attending a school (elementary, high school or equivalent)	Go to #14
	Registered in an apprenticeship program	
	Attending a college	
	Attending a university	
	In other training or skills development program	
	Other (specify)	
14. Are you enrolled as a full-time or part-time student?	Full-time	(If #1=No, then Go to #15) (If #1=Yes, then Go to #16)
	Part-time	(If #1=No then Go to #15, if #1=Yes then Go to #16)
15. Which of the categories best describes your current employment situation?	Employed but currently on a leave	Go to #16
	Unemployed and looking for work	
	Unemployed with an employment offer	
	Unemployed and not looking for work	

	Unemployed and unable to work	
	Not sure	
	Prefer not to say	
Prompt for Client Please answer questions #16-20 by thinking about your experience with the services you received.		
16. You got the kind of services you think you needed.	Strongly Disagree	Go to #17
	Somewhat Disagree	
	Neither Agree nor Disagree	
	Somewhat Agree	
	Strongly Agree	
17. The services you received were the right approach for helping you.	Strongly Disagree	Go to #18
	Somewhat Disagree	
	Neither Agree nor Disagree	
	Somewhat Agree	
	Strongly Agree	
18. If you were to seek help again, you would seek it from us.	Strongly Disagree	Go to #19
	Somewhat Disagree	
	Neither Agree nor Disagree	
	Somewhat Agree	
	Strongly Agree	
19. You are likely to recommend the program to someone looking for similar services as those you received.	Strongly Disagree	Go to #20
	Somewhat Disagree	
	Neither Agree nor Disagree	
	Somewhat Agree	
	Strongly Agree	
20. You did not need to seek additional employment or training related services on your own.	Strongly Disagree	End of Survey
	Somewhat Disagree	
	Neither Agree nor Disagree	
	Somewhat Agree	
	Strongly Agree	

8.6   Supporting Documents and Links Appendix

- Financial Support and Performance Base Funding Support Guide