



Job Aid-Recording Outcomes and Checkpoints

ALL Documentation/Proof Must Include the Following Information

- Client's Name ✓
- Business Name ✓
- Date of the pay period (which includes the outcome date) ✓
- Evidence of at least 20 hours/week. ✓

Recording EAP Outcome

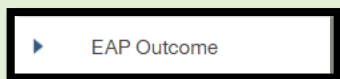
Add Outcome and Complete EAP Questionnaire

1. From the Employment Action Plan home page, select and click the **"ADD OUTCOME"** from the ellipses menu.
2. Add Outcome EAP window will open, enter in the date (*cannot be a future date*).
3. The Add Outcome: EAP window will open; complete the Employment Status Questionnaire (ESQ) with client and click **"SAVE"**.
4. The Add Outcome window prompt will open; click **"YES"** to continue.
5. When an Outcome has been added to the EAP, the system will auto generate the EAP Outcome and 1, 3, 6, and 12 month Checkpoints under the Outcome Tab.
6. The client is now considered as a client served and the system will automate the 'Client Served' checkbox on the EAP homepage to 'yes'.

NOTE:

When completing the ESQ, the job details must match the selected Performance Based Funding Outcome statement e.g. If a client is employed working 20hrs or more, ensure the wage in the Job details reflects 20+ hours. Failure to do so may result in checkpoints not populating.

Attach Documentation



1. From the Outcomes Tab select the **'ellipses'** of the **"EAP OUTCOME"** and click **"ADD ATTACHMENT"**.
2. On the Add Attachment page select the 'Document Type' from the available drop-down menu and complete all the required fields. Use



	<p>the 'Browse' feature to upload the documents (e.g. Initial TIPA, paystubs, letter from Employer, Attestation etc.).</p> <ol style="list-style-type: none"> Add a description and click "SAVE". <p>NOTE: Proof of start date (examples):</p> <ul style="list-style-type: none"> ✓ An offer letter or email from the employer ✓ An initial paystub that shows zero cumulative hours/pay ✓ A paystub that shows the change in hours to at minimum an average of 20 hours per week ✓ Initial Training Incentive Placement Agreement (TIPA) <p>Description Details:</p> <ul style="list-style-type: none"> ▪ Pay Period dates e.g. March 31-April 13, 2024 ▪ Brief explanation if there was a decrease in hours: "Clients pay below 20hrs due to an absence from work" (e.g. Sick). ▪ Declare which copy of the TIPA has been uploaded, e.g. Please see a signed copy of initial TIPA attached.
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Recording Checkpoints

Key Note: All Checkpoints **must** be completed by the "Scheduled Date" regardless if contact attempts are unsuccessful. If a Service Provider cannot reach a client, caseworkers can complete the Checkpoint by selecting 'Unable to contact client'. The checkpoints can be edited on a later date if circumstance changes.

<p style="text-align: center;">Modify 1,3,6, and 12 Month Checkpoints</p> <div style="border: 2px solid black; padding: 10px; margin: 10px 0;"> <ul style="list-style-type: none"> ▶ Outcome at 12 months ▶ Outcome at 6 months ▶ Outcome at 3 months ▶ Outcome at 1 month </div>	<ol style="list-style-type: none"> From the <u>Outcomes</u> tab find the desired Checkpoints and select the Ellipses; click "EDIT CHECKPOINT". On the <u>Modify Checkpoint: EAP</u> page, enter in the Start and End Date fields. Select the outcome from the drop down menu: Employed, Not in Labor Force, Unemployed, Unable to Contact Client. Complete the 'Outcome Checkpoint Questionnaire'. Click "SAVE". <p>NOTE:</p> <ul style="list-style-type: none"> ▪ Actual Start Date: The date you begin initial contact to complete Questionnaire. ▪ Actual End Date: The date you were able to complete the Questionnaire with the client.
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Actual start and End date may be the same day or may be 2 separate dates.

- If *'Employed'* is selected as an Outcome, the *'Milestone Achieved'* box will check off automatically; **uncheck the Milestone Achieved box before saving if verification is pending.**
- Once the documentation is received regardless if the client is working under or over 20 hrs, upload the evidence. **ONLY check off Milestone Achieved for clients working 20hrs or more.**

Adding Attachments

▶ Outcome at 12 months	22/05/2025	
▶ Outcome at 6 months	22/11/2024	Edit Checkpoint...
▶ Outcome at 3 months	22/08/2024	Add Attachment...

1. From the Outcomes Tab select the **'ellipses'** of the **"EAP OUTCOME"** and click **"ADD ATTACHMENT"**.
2. On the Add Attachment page select the 'Document Type' from the available drop-down menu and complete all the required fields. Use the 'Browse' feature to upload the documents (e.g. paystubs, letter from Employer, Attestation etc.).
3. Add a description and click **"SAVE"**.

NOTE:

Proof of employment for the monitoring checkpoint:

- ✓ An employment letter from the employer stating continuous employment and average weekly hours.
- ✓ A paystub including the checkpoint date, indicating at least an average of 20 hours per week (e.g. The client was employed in the week where the checkpoint date occurred for the threshold (reasonable copies of paystubs will suffice, (e.g. An emailed photograph of a paystub is acceptable).

Description Details:

- Pay Period start and end dates e.g. March 31- April 13, 2024.
- Pay frequency (Weekly/Bi-weekly)
- Brief explanation for decrease in hours e.g. Clients pay below 20hrs due to an absence from work (e.g. Sick).



Attestation Form:

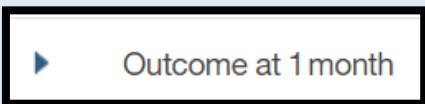
In circumstances where you are unable to attain from the client proof of employment documents, a written attestation that confirms the client's employment will be considered by the WREN:

- *Contact your Coordinator, Quality Assurance and Program Support for pre-approval.*
- *Complete the form and upload into CaMS at the one-month checkpoint for WREN approval.*
- *Upload all supporting documents available into CaMS at the same checkpoint under Attestation.*
- *This form can be found on the Wren's Network Website Service Provider Forms page. [Service Provider Resources – WRE Network](#)*

Review and Action Rejected Performance Based Funding Milestones (PBF)

Review Reason for Rejection

Resubmission Required - PerformanceBased Funding Milestones		
Displaying 1/1 records (Filter Applied)		
Client Name	Milestone	SSM Rejection Date
Minnie Mouse	Outcome at 1 month	10/05/2024 08:49:55



NOTE: *Ensure widgets are added to workspace. Click the wrench symbol on the workspace page. Check off Resubmission Required- Performance Based Funding Milestones. Click "Save".*

1. From the workspace page navigate to the Resubmission Required- Performance Base Funding (PBF) Milestone widget.
2. Here you will see the client's name, the Milestone that has been rejected, and the date the WREN rejection date.
3. Click the name of client to open the EAP's home page. Select the Outcome tab
4. From the Outcome tab find the checkpoint that has been rejected (e.g. Outcome at 1 Month) and use the arrow on the left hand side to toggle into Checkpoint to review rejection reason (e.g. missing information, attachment not legible, signatures on TIPA required etc.).

SSM Approval Status			
SSM Submission Status	Rejected	Date Approved/Rejected	13/06/2024 10:58
Approved By/Rejected By	Nadine Phillip	Comments	Outcome at 1 month cannot be review due to missing information. Copies of proof of employment missing. Please attach the required pay stubs.





<p>Add Attachment</p>	<ol style="list-style-type: none"> Once the appropriate proof/document has been updated or submitted, click on the ellipses of the desired Checkpoint and select "Add Attachment". Use browse feature to upload new document. Update description details (if needed). Click "Save". 																									
<p>Edit Checkpoint</p> <div data-bbox="181 527 716 604" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> Milestone Achieved <input checked="" type="checkbox"/> </div>	<ol style="list-style-type: none"> Click on the ellipses of the desired Checkpoint and select "Edit Checkpoint". Review that details remain accurate; update if needed. Check off the "Milestone Achieved" box. Click "Save". 																									
Pending Reviews List																										
<p>Find Pending Review List</p> <div data-bbox="207 827 690 1115" style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>My Shortcuts</p> <ul style="list-style-type: none"> Approve Financial Supports Approve Performance Based Funding Milestones Register a Person Register an Employer or a Corporate Entity My Service Provider <li style="background-color: yellow;">Pending Reviews </div>	<ol style="list-style-type: none"> From the Workspace page click "Pending Review" link on the <u>My Shortcuts Widget</u>. The "Pending Reviews" tab will open and display a list of all Pending Reviews assigned to the logged in user. The user can sort by Review Type (Outcome at 1, 3, 6, & 12 months) or by Review Date (from older to newer dates). Click on the clients EAP reference number and navigate to the Outcome tab to begin recording the checkpoint. 																									
<div data-bbox="167 1142 1422 1430" style="border: 1px solid black; padding: 10px;"> <p>Pending Reviews</p> <table border="1"> <thead> <tr> <th>Case Reference</th> <th>Program</th> <th>Primary Client</th> <th>Review Type</th> <th>Review Date</th> </tr> </thead> <tbody> <tr> <td>7526662</td> <td>Employment Action Plan</td> <td>Bob Evans</td> <td>Outcome at 1 month</td> <td>22/06/2024</td> </tr> <tr> <td>7526995</td> <td>Employment Action Plan</td> <td>Scrooge McDuck</td> <td>Outcome at 1 month</td> <td>17/06/2024</td> </tr> <tr> <td>7526996</td> <td>Employment Action Plan</td> <td>Darkwing Duck</td> <td>Outcome at 1 month</td> <td>17/06/2024</td> </tr> <tr> <td>7526972</td> <td>Employment Action Plan</td> <td>Minnie Mouse</td> <td>Outcome at 1 month</td> <td>13/06/2024</td> </tr> </tbody> </table> </div>		Case Reference	Program	Primary Client	Review Type	Review Date	7526662	Employment Action Plan	Bob Evans	Outcome at 1 month	22/06/2024	7526995	Employment Action Plan	Scrooge McDuck	Outcome at 1 month	17/06/2024	7526996	Employment Action Plan	Darkwing Duck	Outcome at 1 month	17/06/2024	7526972	Employment Action Plan	Minnie Mouse	Outcome at 1 month	13/06/2024
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