



Job Aid: Building an Employment Action Plan in CaMS

**Sections that are new or have been amended (Revised April 2024)*

Ongoing Case Management: Tasks	Steps and Key Notes
Search for a Common Assessment in CaMS	
“Search for a Case”*	<p>NOTE: To prevent a potential risk of creating/registering duplicate cases, Service Providers should always search for CA records in the client’s file first. If the Common Assessment (CA) record does not appear under the CA tab within the EO case, this is because there is discrepancy between information in the CA and the information in CaMS preventing the CA from linking to the case file in CaMS. The CA will have to be searched under the <u>“View Common Assessment”</u> page (link found on My Shortcuts list on Workspace page). See steps below for CA not Found.</p> <ol style="list-style-type: none"> 1. Log into CaMS 2. From the Workspace page select “SEARCH FOR A CASE” under the My Shortcuts List 3. On the <u>CASE SEARCH</u> page use the magnify glass to search your client 4. The <u>PERSON SEARCH</u> page window will load; use the necessary fields to conduct your search (eg. name, D.O.B.) 5. Click “SEARCH” 6. The search results will populate; using the information provided in the search results, find your client (verify name and DOB match and are correct so that you select the right person) 7. Click “SELECT” 8. The <u>CASE SEARCH</u> page will load and you will see the client’s name in the <u>‘Client Name’</u> box 9. Click “SEARCH” 10. The search results will populate; you will be able to see the Employment Ontario (EO) case as well as the clients current or past Service Plans. 11. Select the client’s EO case 12. From the EO case home page select the “COMMON ASSESSMENT” tab 13. From the <u>Common Assessment</u> tab you will be able to see the Common Assessment Record.



CA NOT found in EO case Common Assessment* Tab

**View Common Assessment Record:
Search Results shows an EO case Linked***

Search Results (Number of Items: 3)				
EO Case Ref#	Client Name	Date of Birth	Phone Number	Common Assessment Ref#
6990080	Rea Cooke	09/08/1990		CA1004143

NOTE: Common Assessment was able to find and locate an existing EO case in CaMS; however there is a discrepancy between the information in CaMS and the Common Assessment.

1. On the CaMS Landing page click “**VIEW COMMON ASSESSMENTS**” link from the My Shortcuts List.
2. The View Common Assessments page will pop up.
3. Search client by CA number (eg. CA1234567) and change status to “**UNPROCESSED/PROCESSED**”
4. The CA will populate in search results
5. Click “**ELLIPSES**” and select “**UPDATE CLIENT RECORD**”
6. Modify Person window will open; ensure the updated information is correct and click “**SAVE**”
7. Navigate to Workspace page; complete steps to search client using “SEARCH FOR A CASE” steps (See above) or From the View Common Assessment page; find the CA record and click the EO case number

**View Common Assessment Record:
Search Results shows no EO case linked***

Search Results (Number of Items: 1)				
EO Case Ref#	Client Name	Date of Birth	Phone Number	Common Assessment Ref#
?	Kelly KAPOOR		5199595555	CA111778

NOTE: A Person may be known to CaMS. However, when a CA cannot locate an existing EO case (eg, client changed name, no EO case, does not have a SIN etc.), Service Provider can complete a search in CaMS to update EO record first (eg. change name, add SIN etc.)

1. On the CaMS Landing page click “**VIEW COMMON ASSESSMENTS**” link from the My Shortcuts List.
2. The View Common Assessments page will pop up.



	<ol style="list-style-type: none"> 3. Search client by CA number (eg. CA1234567) and change status to “UNPROCESSED/PROCESSED” 4. CA will populate in search results. If the EO Case reference doesn’t show in search result, this means the EO case is not linking to the Common Assessment 5. Click ellipses and select “CREATE NEW RECORD” 6. The <u>Confirm Person Not Already Registered</u> page will open with the client’s name and date of birth pre-populated. 7. Click “SEARCH” 8. Find client in search results; click the “ELLIPSES” and select “UPDATE CLIENT RECORD” 9. <u>Modify Person</u> window will open; ensure the information that is being updated is correct, click “SAVE” 10. Navigate to <u>Workspace</u> page, complete steps to search client using “SEARCH FOR A CASE” steps listed above (or from the View Common Assessment page, find the CA record and click the EO case number) 11. From the EO case home page, click the <u>Common Assessment</u> tab to locate the CA
Creating, Building, and Activating the EAP	
Create Employment Action Plan (EAP)*	<p>NOTE: <i>The Common Assessment must be completed and submitted in order to create an Employment Action Plan (EAP) in CaMS.</i></p> <ol style="list-style-type: none"> 1. From the client’s EO case click the <u>Common Assessment</u> tab 2. Find the client’s common assessment and click the ellipses on the right hand side; click “CREATE EAP” 3. On the EO home page select the <u>Common Assessment</u> tab 4. Click the Ellipses on the right and select “CREATE EAP” 5. The <u>Create Employment Action Plan (EAP)</u> page will open; complete the following fields: Program, Referred in, Owner, Service Delivery Site, Self Service Initiated, Employment goal, Number of hours worked, wage per hour, NOC and Employer at Entrance <p><i>NOTE: The answers related to all Employment Goals fields were pulled from the CA, if some questions were answered ‘prefer not to answer’ or ‘not sure’ they will need to be completed with proper answers before an Outcome can be added. (See Outcomes for more details)</i></p> <ol style="list-style-type: none"> 6. Click “SAVE”



	<ol style="list-style-type: none"> 7. Once the Employment Action Plan (EAP) has been created the home page will open. 8. From the EAP home page you will be able to see the status of the EAP will be set to “Open” and all the responses previously entered in the <u>Create Employment Action Plan</u> window will be displayed under Service Plan Home, Case Details. You will also see the following tab headings: Common Assessment, Plan Content, Plan Summary, Case Notes, and Outcomes.
Add Sub-Goal(s)	<ol style="list-style-type: none"> 1. From the home page of the <u>Employment Action Plan</u> select the “PLAN CONTENT” tab 2. Click “NEW SUB-GOAL” 3. On the <u>Create Sub-Goal</u> Page select the appropriate Sub Goal(s) and click “SAVE”
Add Plan Items to Sub-Goal(s)	<p>NOTE: <i>Fields on the Plan Items page will vary depending on the Sub-Goals selected.</i></p> <ol style="list-style-type: none"> 1. On the <u>Plan Content</u> page click the “ELLIPSES” of the sub-goal; select and click “ADD PLAN ITEM” 2. The <u>Plan Item Type</u> page will pop up; check the boxes next to the appropriate Plan Item activities and click “SAVE” 3. Continue these steps (if needed) to add additional plan items and sub-goals to the clients EAP. 4. From the <u>Plan Content</u> page, toggle into the relevant sub-goal; you will now see the plan item has been added with a status of <u>Not Started</u>. Adding a date begins the plan item. <i>Note: Only plan items with the status ‘Not Started’ are able to be deleted.</i> 5. Find the plan item you would like to edit and select the “ellipses” to open the menu; click “EDIT” 6. The <u>Modify Plan Item</u> page will open; enter the <u>Actual Start Date</u> to start plan item <i>Note: As a client progresses with a plan item, the caseworker can edit the plan item</i> 7. Click “SAVE” 8. The system returns to the <u>Plan Content</u> page; the status of the plan item will change to <u>in-progress</u>
	<p>NOTE: <i>These plan items are associated with the Sub-Goal ‘Employment Assistance Services’. To use an employer record within a placement or job trials plan item type, the employer must</i></p>



<p>Adding Plan Items: Employment Assistance Services-Job Placements or Job Trials</p>	<p><i>be registered in the CAMS system, and it must also be associated to a Corporate Entity. Please follow section Add/Register an Employer and Corporate Entity. Attachments for Placements or Job Trials must include a copy of the Employer Registration Form, a Training Incentive Placement Agreement, and proof of the incentive provided to employers (e.g., paystubs during the placement period).</i></p> <ol style="list-style-type: none"> 1. From the home page of the Employment Action Plan, select the “PLAN CONTENT” tab 2. Click “NEW SUB-GOAL” 3. On the Create Sub-Goal Page, select ‘Employment Assistance Services Sub Goal’ and click “SAVE” 4. From the Plan Content page, toggle into the Sub-Goal and select the plan item’s ellipses; Click “ADD PLAN ITEM” 5. On the Add Plan Item page, click the checkbox next to Employer-Job Placements or Employer Job Trials; click “SAVE” 6. From the Plan Content page, toggle into the sub-goal and select the plan item’s ellipses; Click “ADD ATTACHMENT” 7. On the Add Attachment page, complete all fields; use the browse feature to upload the required documents 8. Click “SAVE”
<p>Adding Plan items: Employer Financial Supports- Job Placement</p>	<ol style="list-style-type: none"> 1. From the home page of the Employment Action Plan, select the “PLAN CONTENT” tab 2. Click “NEW SUB-GOAL” 3. On the Create Sub-Goal page, select ‘Employer Financial Supports’ Sub Goal and click “SAVE” 4. From the Plan Content page toggle into the Sub-Goal(s) and select the plan item’s ellipses; click “ADD PLAN ITEM” 5. On the Add Plan Item page, click the checkbox next to ‘Employer-Job Placements with Financial Supports’ or ‘Employer Job Trials with Financial Supports’; click “SAVE” 6. From the Plan Content page, toggle into the sub-goal and select the plan item’s ellipses; Click “ADD ATTACHMENT” 7. On the Add Attachment page, complete all fields; use the browse feature to upload the required documents 8. Click “SAVE”



<p>Activate Employment Action Plan</p>	<p>NOTE: The Employment Action Plan must have at least one sub-goal and plan item defined before it can be activated.</p> <ol style="list-style-type: none"> 1. Navigate to the <u>EAP</u> home page. 2. Click the “ELLIPSES” on the right hand side; select and click “ACTIVATE” 3. When prompted to activate the EAP, enter Accepted Date and click “SAVE” 4. The EAP status will change to ‘<u>Active</u>’; this can be found on the EAP home page. <p>NOTE: Use the date that the EAP activities were accepted and reviewed by the client. If an ‘<u>Accepted Date</u>’ is left Blank when activating the EAP; the EAP status will change to Approved and the user will need to add a Date Accepted in the client’s Plan Summary to complete the activation. To add Date Accepted follow these steps:</p> <ul style="list-style-type: none"> ○ <i>Navigate to plan summary tab</i> ○ <i>Click select; from the ellipses menu select edit</i> ○ <i>On the <u>Modify Plan Summary</u> page use the calendar or enter the date in the Date Accepted field</i> ○ <i>Click save</i> ○ <i>The EAP status will change to ‘<u>Active</u>’; this can be found on the EAP home page.</i>
<p>Access Plan Summary; Print</p>	<p>NOTE: If client would like a copy of their EAP, the caseworker can print a copy of the EAP for the client for their personal records from the Plan Summary tab</p> <ol style="list-style-type: none"> 1. From the <u>Employment Action Plan</u> home page select the ‘Plan Summary Tab’ 2. Click “SELECT” to access Plan Summary 3. The <u>Plan Summary</u> page will display, click and select “DOWNLOAD PLAN IN ENGLISH” from the Ellipses Button 4. The Plan Summary will open as a PDF document 5. Click the “PRINT” icon
<p>Modify Plan Summary</p>	<ol style="list-style-type: none"> 1. Navigate to the <u>Plan Summary</u> home page 2. From the ellipses select and click “EDIT” 3. <u>Modify Plan Summary Details</u> page will open; enter Date Accepted (if needed) in the Acceptance Information Panel 4. Click “SAVE”



Add Attachments	
Job Seeker and Employer Financial Support Plan Items*	<p>NOTE: Attachments for Financial Supports must include an itemized receipt with proof of the expense/item purchased and date.</p> <ol style="list-style-type: none"> 1. From the home page of the Employment Action Plan select the “PLAN CONTENT” tab 2. From the Plan Content page, toggle into the designated Sub-Goal and select the plan item’s ellipses; Click “ADD ATTACHMENT” 3. On the Add Attachment page complete all fields; use the browse feature to upload the required documents to CaMS (Document Type, New File, Receipt Date, Description) 4. Click “SAVE” <p>NOTE: Once ready to submit verification to WREN, when editing plan financial support plan items, complete End Date, Outcome, Cost, HST, Rationale and then check the box ‘Ready for Review’ and click ‘SAVE’</p>
Modify, Complete Plan Item	<ol style="list-style-type: none"> 1. From the Employment Action Plan home page select the Plan Content Tab 2. On the Plan Content page toggle in to the relevant Sub-Goal 3. Click “EDIT” PLAN ITEM from the Ellipses next to the relevant plan item 4. The Modify Plan item page will open; complete the necessary fields you would like to edit 5. To complete a Plan Item, add a date to the ‘Actual end date’ field and change the Outcome to ‘Attained’ or ‘incomplete’. 6. Click “SAVE” 7. The Status has now changed to “COMPLETED” and the Outcome has now changed to “ATTAINED” and is displayed on the Plan Content home page
Delete Plan Item	<p>NOTE: If a plan item has a status of “In Progress” or “Completed,” it cannot be deleted; it can only be cancelled. A Plan Item with a Status “Not Started” can be deleted. Once a plan item has been deleted, no record remains.</p> <ol style="list-style-type: none"> 1. From the Employment Action Plan home page select the ‘Plan Content Tab’ 2. On the Plan Content page toggle in to the relevant Sub-Goal 3. Click “DELETE PLAN ITEM” from the Ellipses next to the relevant plan item.



	<ol style="list-style-type: none"> When prompted to confirm the delete, click “YES”
Cancel Plan Item	<ol style="list-style-type: none"> From the Employment Action Plan home page select the Plan Content Tab On the Plan Content page toggle in to the relevant Sub-Goal Click “EDIT PLAN ITEM” from the ellipses next to the relevant plan item. The Modify Plan Item page will open. Select “CANCELLED” from the Outcome drop-down menu. If an ‘Actual Start Date’ has been previously entered and saved, delete the date. Click “SAVE”. The Outcome has now changed to “ATTAINED” on the Plan Content home page
Cancel Sub-Goal	<ol style="list-style-type: none"> From the Employment Action Plan home page select the Plan Content Tab Click “EDIT SUB-GOAL” from the ellipses next to the relevant Sub-Goal. On the Modify Sub-Goal Page, select CANCELLED from the Outcome drop-down menu Click “SAVE” The Outcome has changed to Cancelled on the Plan Content home page
Delete Sub-Goal	<p>NOTE: A sub-goal cannot be deleted if there are plan items associated with it.</p> <ol style="list-style-type: none"> From the Employment Action Plan home page select the Plan Content Tab Click “DELETE SUB-GOAL” from the Ellipses next to the relevant Sub-Goal. On Delete Sub-Goal Page, click “YES” when asked to confirm delete The deleted Sub-Goal will no longer appear on the Plan Content home page
Complete Sub-Goal	<p>NOTE: All associated plan items must have a defined outcome of “Attained”, “Not Attained”, or “Cancelled” to complete a Sub-Goal.</p> <ol style="list-style-type: none"> From the Employment Action Plan home page, select the Plan Content Tab Click “EDIT SUB-GOAL” from the Ellipses next to the relevant Sub-Goal.



	<ol style="list-style-type: none"> On the <u>Modify Sub-Goal</u> Page, select the appropriate Outcome from the drop-down menu and click “SAVE” The outcome has changed on the Plan Content home page
Outcomes	
Add Outcome*	<p>NOTE: To add an Outcome, the EAP’s Case Status must be active and all Plan Items and Sub-Goals must be completed (end dated and assigned an outcome). Only then will the “Add Outcome” option be available in the drop down menu from the EAP home page ellipses. An Exception to this rule is that the Job Placement Plan items (under Sub-Goals: <u>Employment Assistance Services</u> and <u>Employer Financial Supports</u>) may remain in an “In-Progress” state if an Employer intends to permanently hire a client on once the placement period is complete. The Service Provider can then add an Outcome to the EAP moving the client into the ‘Retention Phase’ at the start of the client’s placement. If all plan Items and Sub-Goals have an end date and outcome assigned, and the “Add Outcome” option is not available, there may be information missing from the <u>Employment Goals</u> page, found under ‘Modify Goals’ of EAP home page ellipses. See below for additional instructions.</p> <ol style="list-style-type: none"> From the <u>Employment Action Plan</u> home page, select and click the “ADD OUTCOME” from the ellipses menu. <u>Add Outcome EAP</u> window will open, enter in the date (<i>cannot be later than today’s date</i>) The <u>Add Outcome: EAP</u> window will open; complete the questionnaire with client and click “SAVE” The <u>Add Outcome</u> window prompt will open; click “YES” to continue. A confirmation message will display regarding adding the Outcome Questionnaire; click “YES” 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’ <p>NOTE: Employment Goals must be defined for the Add Outcome action to be available. The Employment Goals are: Goals, NOC, Number of Hours Worked and Wage Per Hour</p> <ul style="list-style-type: none"> ▪ Employment Goal ▪ Employment Goal- Number of hours Worked ▪ Employment Goal- NOC ▪ Employment Goal- Wage Per Hour



	<p>Modify Goals:</p> <ol style="list-style-type: none"> 1. From the Employment Action Plan home page, select and click the “MODIFY GOALS” from the ellipses menu 2. The Modify Goals window will open, complete the fields that are ‘REQUIRED’; client contact may be necessary to complete the missing information. 3. Click “SAVE”
<p>Outcome Checkpoints/Modify Checkpoints*</p>	<p>NOTE: All EAP Checkpoints are system generated when an Outcome is added to an EAP. When adding Start Date, use the day you began to make first contact with the client; when adding Actual End date use the date you completed the Checkpoint. Each Outcome Checkpoint can be modified from the Ellipses if the user needs to update the information or add attachments.</p> <ol style="list-style-type: none"> 1. From the Employment Action Plan home page, navigate to the Outcomes tab 2. Find the desired Outcome and select the Ellipses and click “EDIT CHECKPOINT” 3. On the Modify Checkpoint: EAP page, enter in the Start and End Date fields 4. Complete the ‘<i>Outcome Checkpoint Questionnaire</i>’, click “SAVE” 5. From the Case Outcome Lists under the Outcome tab select the Ellipses of the desired Checkpoint and click “ADD ATTACHMENT” 6. 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 (eg. paystubs, letter from Employer, Attestation etc.). Add a description and click “SAVE”
<p>Close Employment Action Plan</p>	<p>NOTE: If you close an Employment Action Plan, it cannot be reopened. If the EAP is closed prior to completion, during the monitoring phase, or after the 12-month checkpoint, the closure reasons available may differ. The Closure Reason cannot be changed once the EAP has been closed with a reason of “Opened in Error.”</p> <ol style="list-style-type: none"> 1. From the Employment Action Plan home page, select and click “CLOSE” from the ellipses 2. Select the appropriate closure reason and click “SAVE” 3. Close Service Plan page prompt will pop up, click “YES”