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EOIS-CaMS USER GUIDE

for new LBS staff

Canada

EMPLOYMENT ONTARIO

Ontario

The EOIS-CaMS User Guide for New LBS Staff

Introduction and Disclaimer:

*Please note that this user guide is intended as an **informa**l guide for new users of the Employment Ontario Information System – Case Management System, also known as EOIS-CaMS (or CaMS). Although some information in the guide applies to the broad use of EOIS-CaMS, it is primarily written for Literacy and Basic Skills (LBS) service providers.*

The user guide provides details on the functionality of EOIS-CaMS using screenshots, step-by-step instructions and short explanations. In some sections, program/site-specific processes must be considered along with the steps and explanations provided.

The guide is best viewed online so that the many screenshots from the EOIS-CaMS system are more clearly visible.

All LBS providers are expected to check the Ministry of Labour, Training, and Skills Development's Employment Ontario Partners Gateway (EOPG) and myEOIS sites on a regular basis for updates and changes to EOIS-CaMS. The authors of this guide are not responsible for any misinterpretation or misuse of the information included in the guide.

Please note also that the EOIS applications and the associated resources mentioned in this guide are upgraded/updated periodically. This user guide is based on the system version and resources available as of January 2022 and primarily covers the Literacy and Basic Skills (LBS) Program.

Table of Contents

Getting to know the Websites and Forms

Employment Ontario Partner's Gateway Website

The Ontario Ministry of Labour, Training and Skills Development (MLTSD) has an important website containing a wealth of information: the **"Employment Ontario Partner's Gateway"** (EOPG) at http://www.tcu.gov.on.ca/eng/eopg.

On the EOPG site, you will find helpful program tools and materials to support service providers delivering Employment Ontario (EO) programs.

On the EOPG landing page, you will find tabs along the left-hand side that allows you to easily navigate to different areas of the website. You can also subscribe to the RSS newsfeed to receive any important Ministry notifications.

Navigating EOPG

❶ ***New Postings:*** This link provides a list of any information that was added to the site during the past four weeks.

❷ ***Programs and Services:*** This link provides a list of programs and services available through Employment Ontario. The *Literacy and Basic Skills (LBS) Program* is found here.

❸ ***Stakeholder Engagement:*** This link provides the latest Ministry requirements and information related to the broader Employment Ontario network.

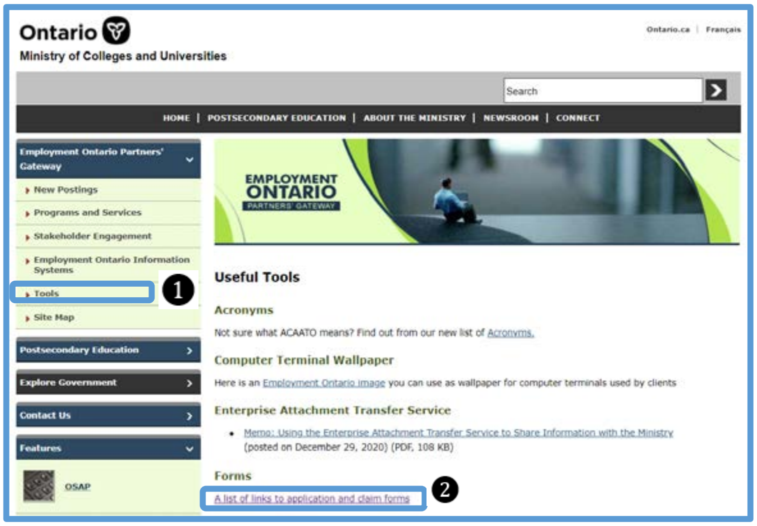
❹ ***Employment Ontario Information System – Case Management System (also known as "EOIS-CaMS" or "CaMS"):*** This link redirects to myEOIS, which contains all information related to the administration and documentation for EO service plans.

Accessing Ministry Forms

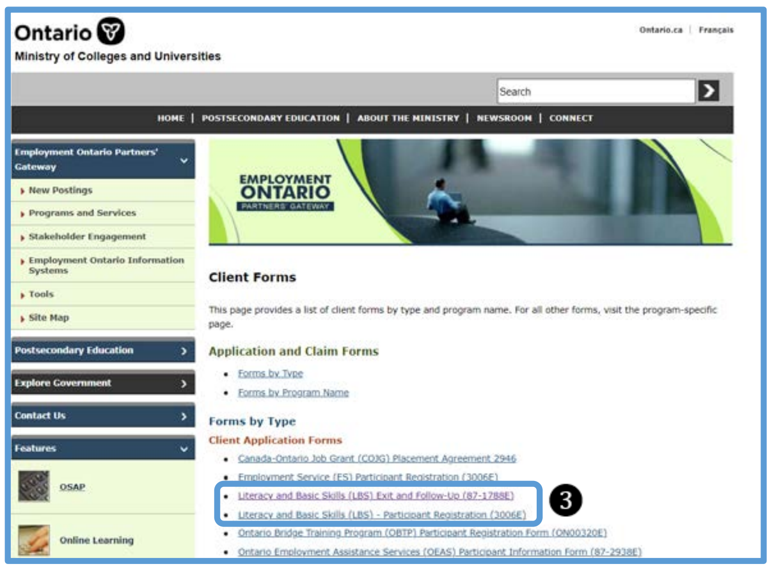
There are two Ministry-mandated forms in the Government of Ontario's **Central Forms Repository** which can be accessed from the EOPG website. These forms are used in the administration of the LBS program. The two forms are the Participant Registration form and the Exit and Follow Up form.

❶ Click on **Tools.**

❷ Click on the **A list of links to application and claim forms** link.



❸ **These two links will access the forms.**



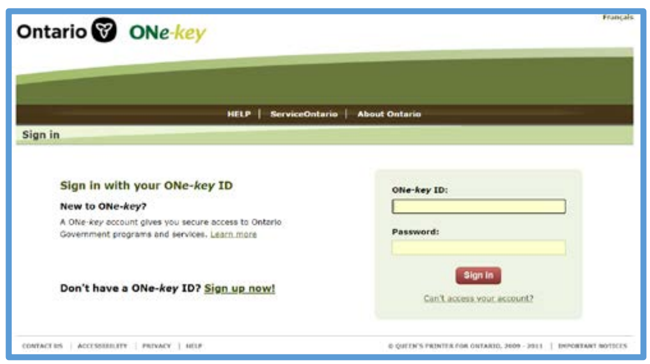
The links below access the forms directly.

Form Title	Form Number	Ministry
Employment Ontario Participant Registration Form	3006E	Labour, Training and Skills Development
Literacy and Basic Skills - Exit and Follow-Up	022-87-1788E	Labour Training and Skills Development

ONe-Key Service Ontario Portal

Literacy and Basic Skills (LBS) service providers are required to use the the Ministry's EOIS-CaMS application to enter and track client/learner data.

This is a web-based application used by the Ontario government and service providers to support the delivery of many provincial programs and services, which include Employment Ontario (EO) programs. EOIS-CaMS is hosted on the ONe-key portal.

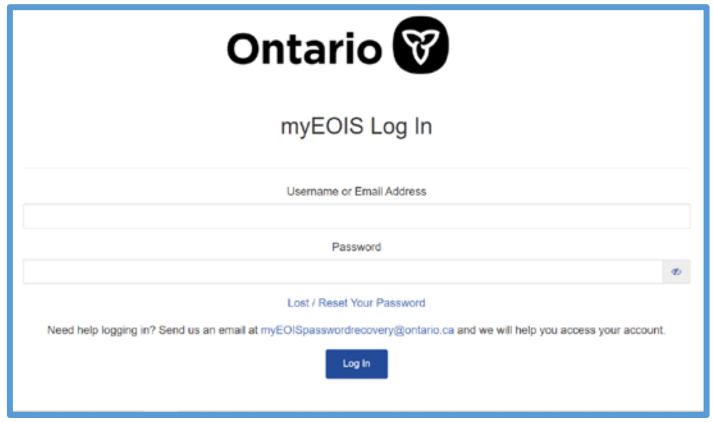


To access EOIS-CaMS, service providers must pass through a two-tier security system. The first tier is through the ONe-key system. After the user successfully logs into ONe-key, they are required to log directly into the EOIS-CaMS application. Access to the ONe-key portal can be found here: https://www.iaa.gov.on.ca/iaalogin/IAALogin.jsp . It is a good idea to save this link as a **favourite** in your web browser.

myEOIS

The myEOIS website provides information related to the administration and documentation for EOIS-CaMS users. All known issues, updates, forms, training materials, and user guides are contained within this portal. Access to myEOIS can be found here: https://www.myeois.tcu.gov.on.ca/login/

New EOIS users can gain access to the myEOIS platform by emailing the service desk at myEOISpasswordrecovery@ontario.ca with the following information:



- Full Name
- Name of Organization
- Individual's work email address
- Specify which EOIS applications they use (i.e. CaMS, APPR, SP Connect)

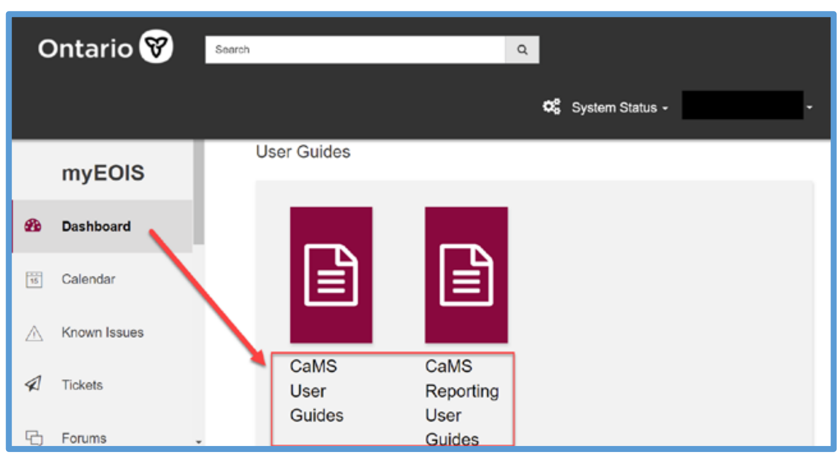
The service desk will verify that the individual is a registered user of the application and initiate the myEOIS registration process. It is important to register with myEOIS!

EOIS-CaMS User Guides, Desk Aids & Training

There is a variety of user guides, desk aids and training videos in the myEOIS site.

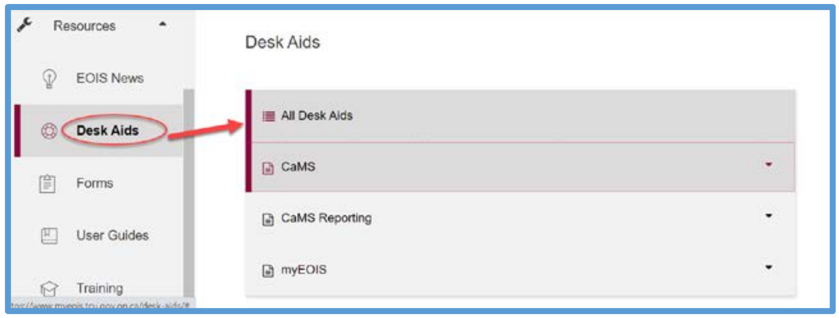
User Guides

After logging into myEOIS, navigate to the menu on the left-hand side and click on **Dashboard**. At the bottom of the page, there are a variety of guides for the overall program administration of Employment Ontario programs.



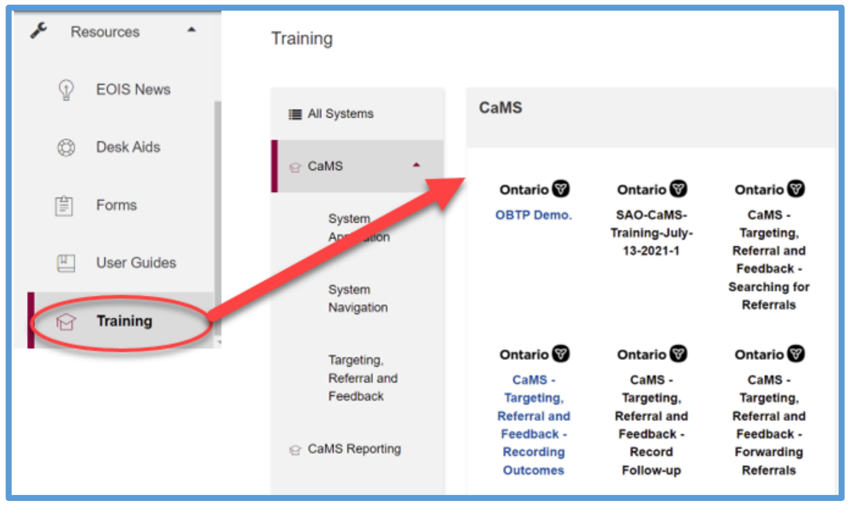
Desk Aids

There are also several quick reference 'Desk Aids' that cover the basic steps for various tasks including creating and activating a service plan in myEOIS.

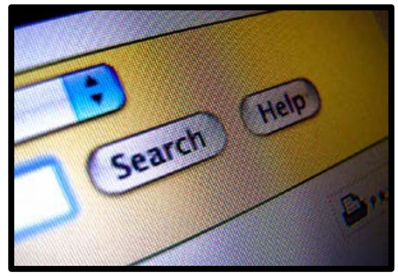


Training

Several training videos are also available by scrolling to the bottom of the menu on the left-hand side and clicking on **Training**.



EOIS-CaMS - Navigating and Searching



Navigating

There are many helpful hints for navigating in CaMS.

When navigating through the EOIS-CaMS system:

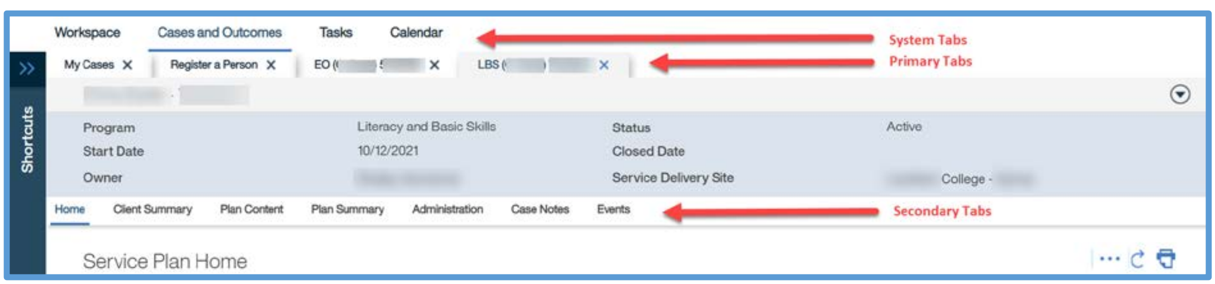
1. Do not use the **back** and **forward** buttons on the browser.
2. **Single-click** only on links and actions/action buttons.
3. Use the **Tab** key to move through the fields.
4. Press the **Shift+Tab** keys to move backwards through the fields.

When having browser issues:

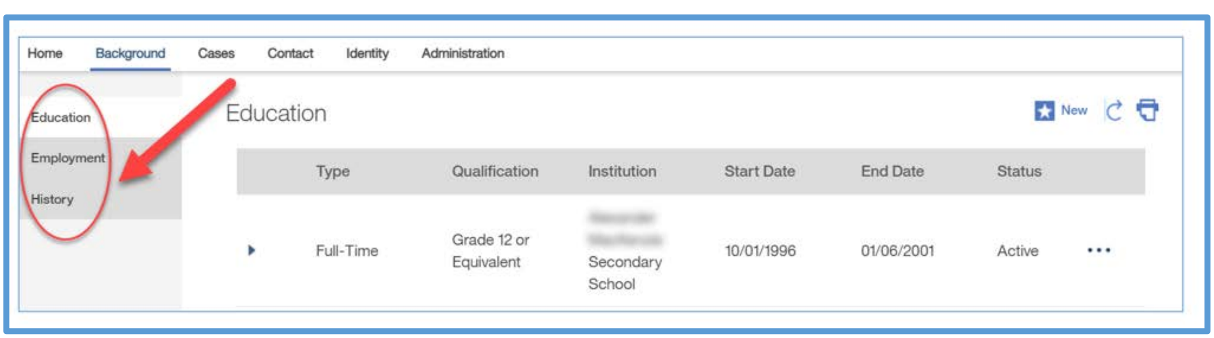
1. Press **<CTRL> + <SHIFT> + <DEL>** to delete the browsing history.
2. Add the website: **gov.on.ca** to **Compatibility View Settings** in your Microsoft Edge browser.

Here are the basic navigation components of the EOIS system:

- **System Tabs:** appear at the very top of every page and function much like a toolbar.
- **Primary Tabs:** appear below the system tabs and function much like web pages.
- **Secondary Tabs:** appear within cases and participants' profiles. In some cases, there will be multiple levels of secondary tabs.



There will also be tabs on the left-hand Tab Content Bar. The items within this bar act as **sub folders** for the specific tab above.



The **Main Content Area** is comprised of five key areas:

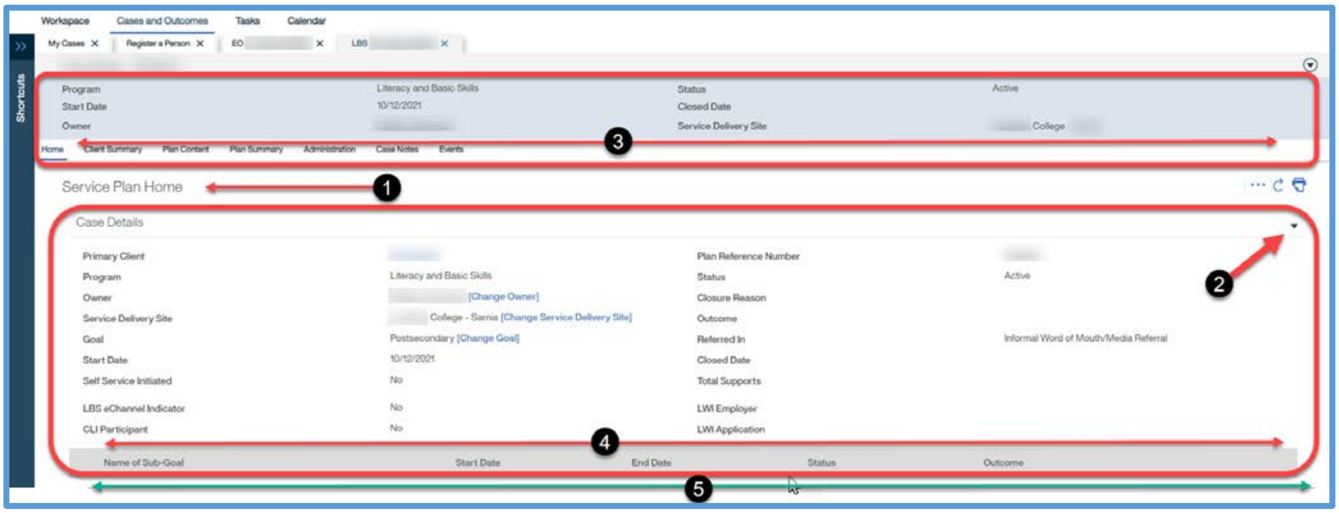
❶ **Page Title**: is the title of the current page the user is viewing.

❷ **Toggle buttons**: are downward arrows located at the top-right corner and on the left-hand side of the system pages and panels. This allows the user to expand and collapse the information within the page.

❸ **Context Panel**: provides a key information summary of case and participant profiles.

❹ **Information Panel**: displays information or fillable fields.

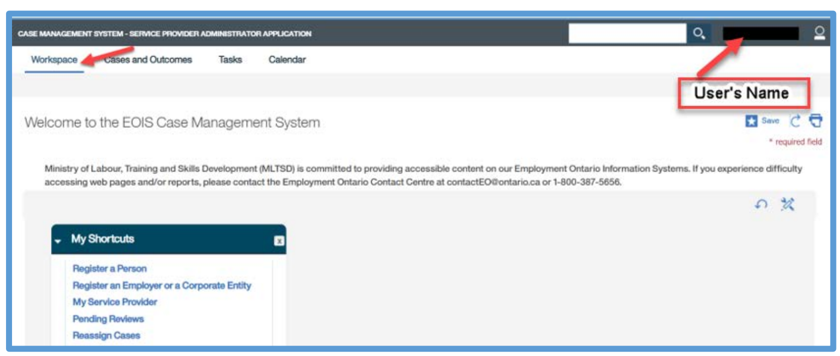
❺ **Main Content Area**: where section content is displayed and entered.



There are two types of home pages:

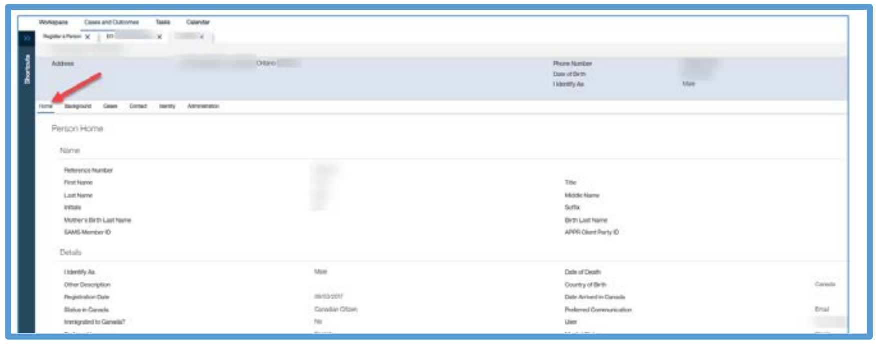
1. **The User's Home Page**

The user's home page, known as the **Workspace** page, is the entry point to the system. Each user has their own home page with access to different links and functions depending on their assigned user role.



2. The Participant and Case Home Pages

These home pages are the central pages relating to a participant or case and can be accessed by clicking the Home Tab in the participant's profile or case.



Here are other navigating features you need to be familiar with.

Within the main content area, there are **five types** of clickable text and buttons that will perform an action when selected. These are shown and described below**.**

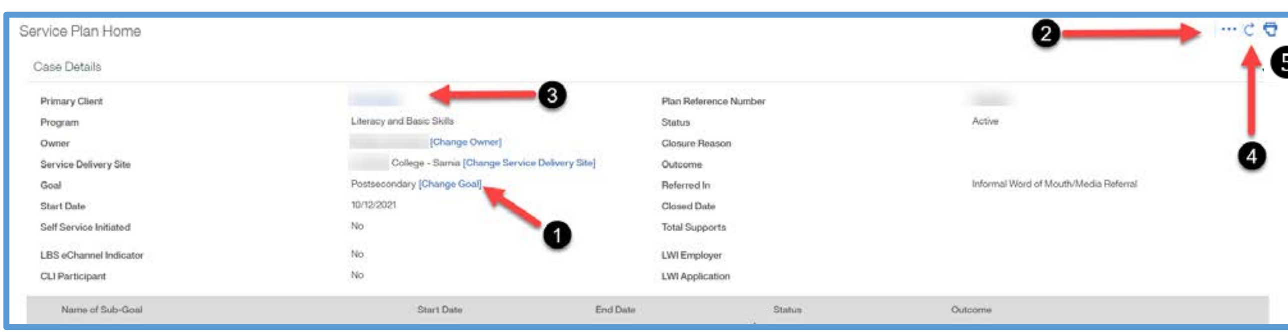
❶ **Action**: a blue coloured text that performs a system function when selected. Examples of actions include "Save" and "Close."

❷ **Action Button**: represented by three dots and displays a drop-down menu when selected that allows the user to quickly perform context-specific actions. There can be several action buttons on a page as they may relate to different items.

❸ **Hyper Link**: a blue coloured text that allows the user to open related pages.

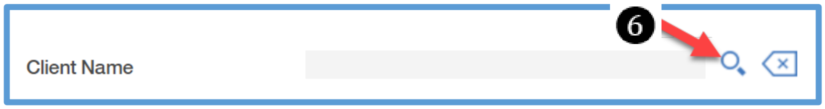
❹ **Refresh Button**: refreshes all the data on the page to ensure that the user is always viewing the most up to date information.

❺ **Print Button:** allows the user to print the page.



Note: Mandatory Fields are indicated with a blue asterisk (*) and all dates are entered in the "**DD/MM/YYYY**" format.

❻ A magnifying glass icon can also help with performing searches.

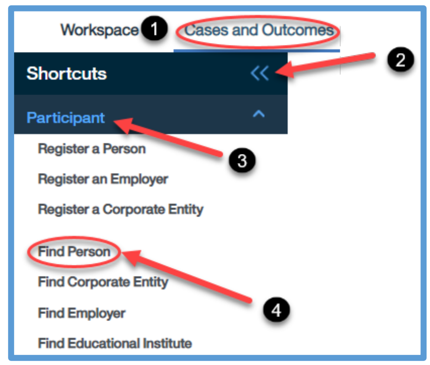


Searching

Performing a Person Search:

The Person Search allows users to search for existing client records. **This search must be performed prior to registering the client, to avoid creating duplicate files in CaMS.** There are many search parameters, including: Social Insurance Number, reference number, last name, first name, date of birth and/or gender.

<u>Start from the Workspace Page</u>



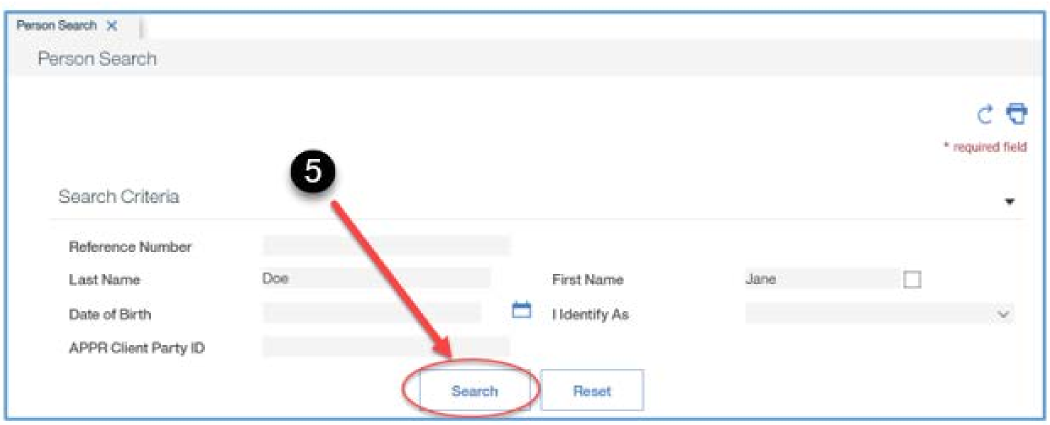
❶ Click the **Cases and Outcomes** system tab.

❷ Open the **Shortcuts** panel.

❸ Click the **Participant** heading.

❹ Select **Find Person**.

❺ Enter the search criteria and click **Search.**



Caution: The system will display an error message if there are not enough search criteria entered.

This is how the EOIS-CaMS system is designed to perform searches:

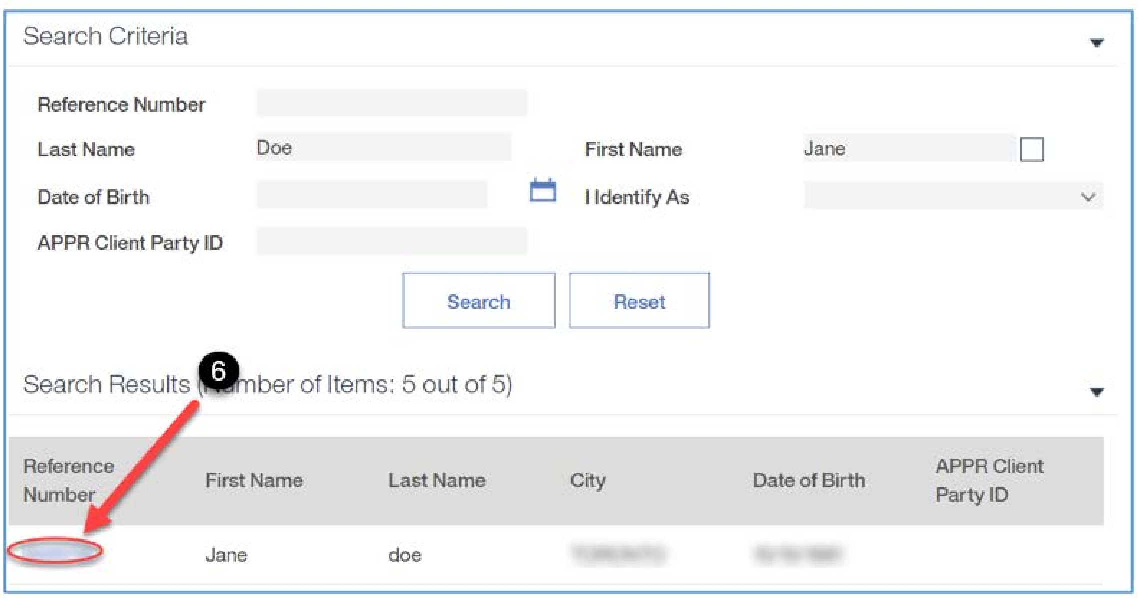
The First Name and Last Name fields will perform a search by partial names. For example, when entering “Soren” in the Last Name field, the system will perform a search for last names that contain “Soren,” like ”Sorenson,” “Sorensen.”

The box beside the First Name field is the nickname option. When selected, the system will search for similar names. For example, when entering “Bill” in the First Name field, and selecting the checkbox beside the field, the system will perform a search for “Bill,” “Billy,” “Will,” and “William”.

The system will ignore special characters (accents) and case (upper and lower) when searching in the First Name and Last Name fields.

❻ The system will display the results that match the search criteria in the Search Results information panel. The number of items returned in the search is indicated in the information panel header.

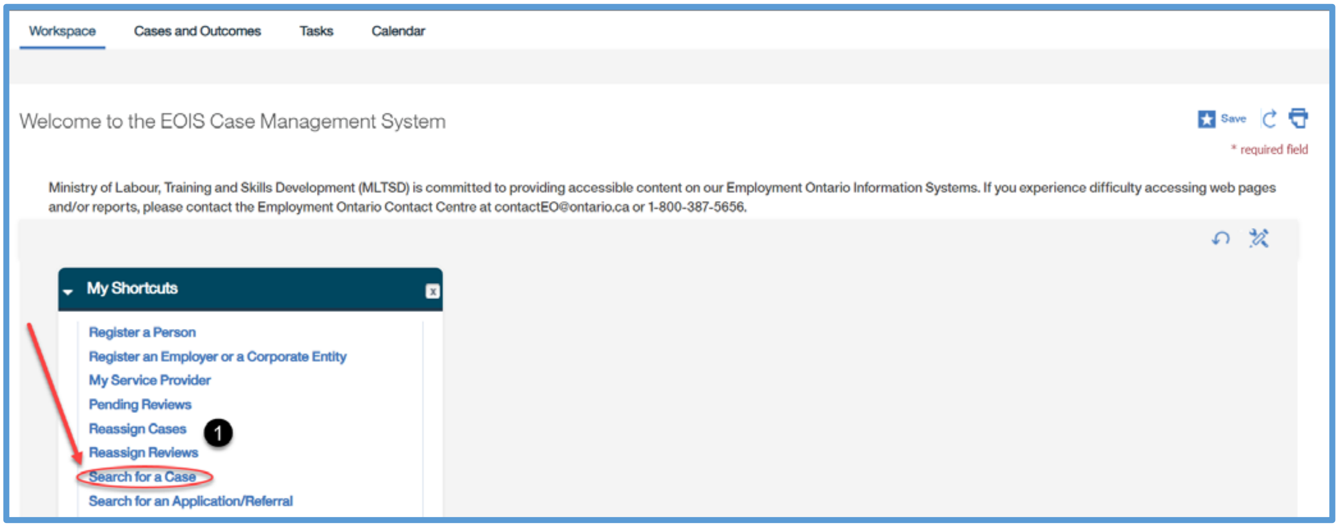
If the client is already registered, click on the corresponding **Reference Number** link to display the Person Home page.



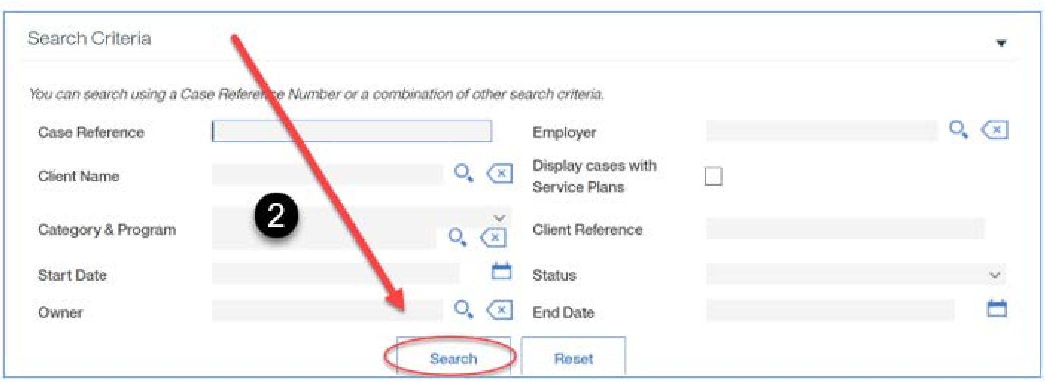
Performing a Case Search:

Start from the Workspace Page

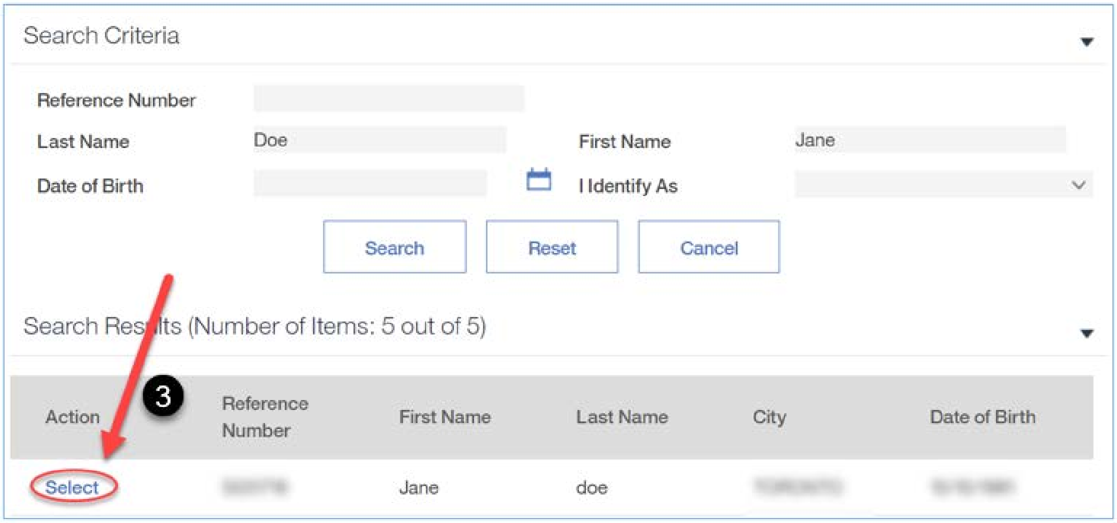
❶ Click **Search for a Case.**



❷ On the case search page, enter the search criteria for a case. If using the Client Name field, clicking on the magnifying glass will open a pop-up window for a Person Search. Click **Search**.

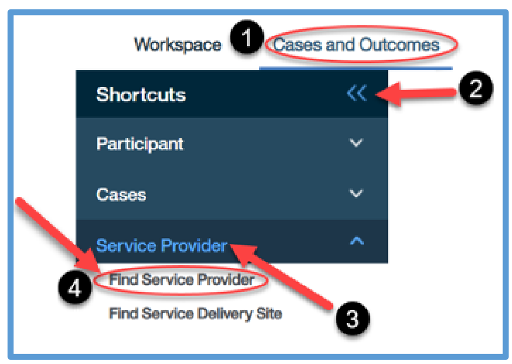


❸ The system will display the results that match the search criteria in the Search Results information panel. The number of items returned in the search is indicated in the information panel header. Click on the corresponding **Select** link:



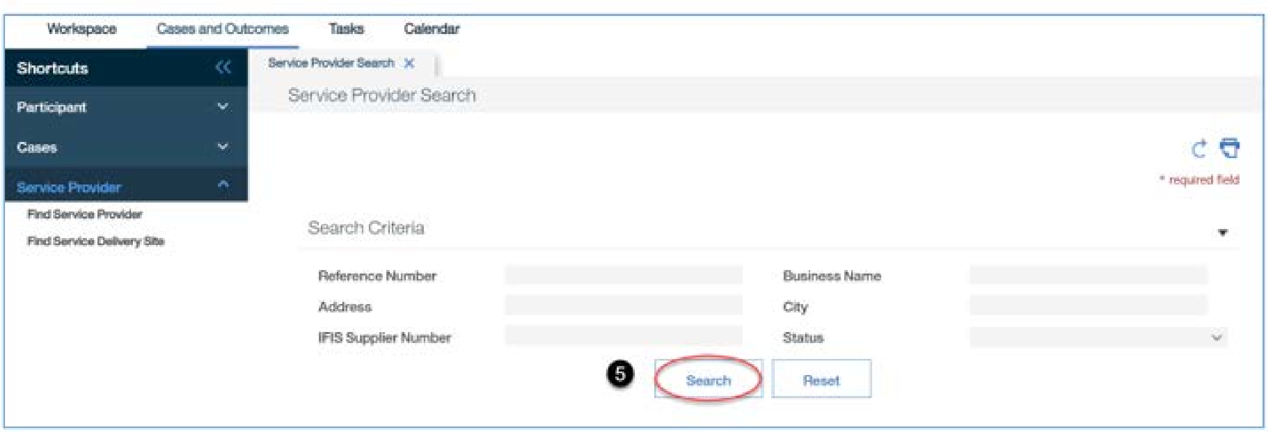
Performing a Service Provider Search:

The Service Provider Search allows the user to find service providers contracted with the Ministry to deliver EO programs.

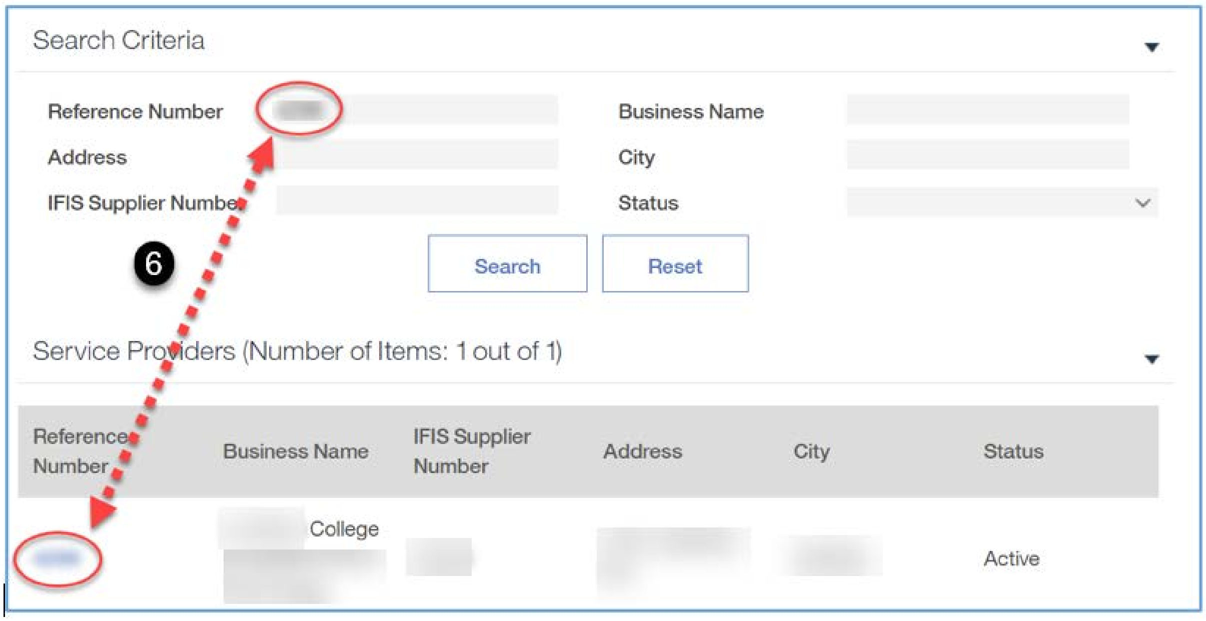


<u>Start from the Workspace Page</u>

1. Click the **Cases and Outcomes** system tab.
2. Open the **Shortcuts** panel.
3. Click the **Service Provider** heading.
4. Select **Find Service Provider**.
5. Enter search criteria for a service provider and click **Search**.



❻ The system will display the results that match the search criteria in the Search Results information panel. The number of items returned in the search is indicated in the information panel header. If the service provider is registered, click on the corresponding **Reference Number** link to display the service provider's page.



Getting Registered and Logging In

Service Provider Registration Authority - SPRA

Each LBS organization will have at least one designated employee who is registered with the Ministry as the 'Service Provider Registration Authority' (SPRA). The SPRA is responsible for creating, monitoring, and removing EOIS accounts for staff users in your organization. They can also assist the user in trouble shooting login issues.

EOIS-CaMS Registration

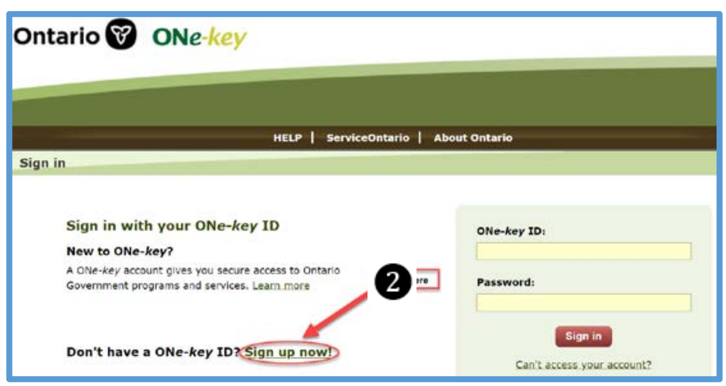
The designated SPRA within your organization will ensure that the appropriate registration forms are completed for each EOIS user. They will then add the user to EOIS-CaMS (with the correct permission levels), which prompts the Ministry to create the user's account. When the account is created, the SPRA can help the new user to access the One-key portal and log into EOIS-CaMS.

The SPRA will request that each new user completes the appropriate registration forms and will then add the new user in EOIS-CaMS. The new user will receive two successive email notification messages (generated by One-key) to confirm that their user account is set-up. The first email will contain the **Enrolment ID Number** and a link to the government's "One-key" log-in page. The second email will follow 48 hours later (possibly sooner) and will contain the new user's EOIS-CaMS Private Identification Number (PIN).

Creating A One-Key Account

❶ Click on the link in the first email.
https://www.iaa.gov.on.ca/iaalogin/IAALogin.jsp

❷ Click on **Sign up now!**



3 Choose and enter a **username** and **Password.**

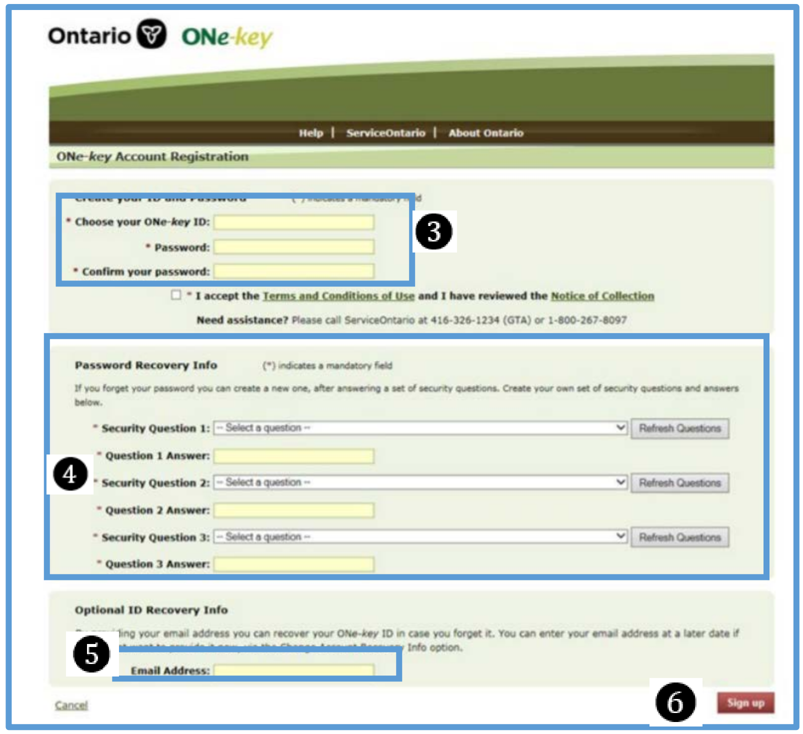
- Enter any username and password. An example of a username would be firstname.lastname.

4 Choose **three** recovery questions that are easy to remember.

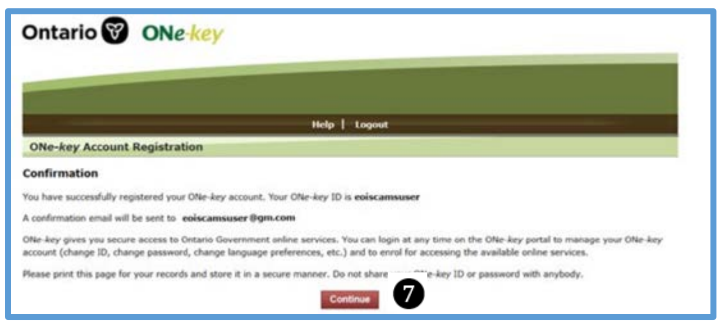
5 Enter an Email Address.

- The optional email is to recover the username in case it is forgotten.

6 Click **Sign Up.**



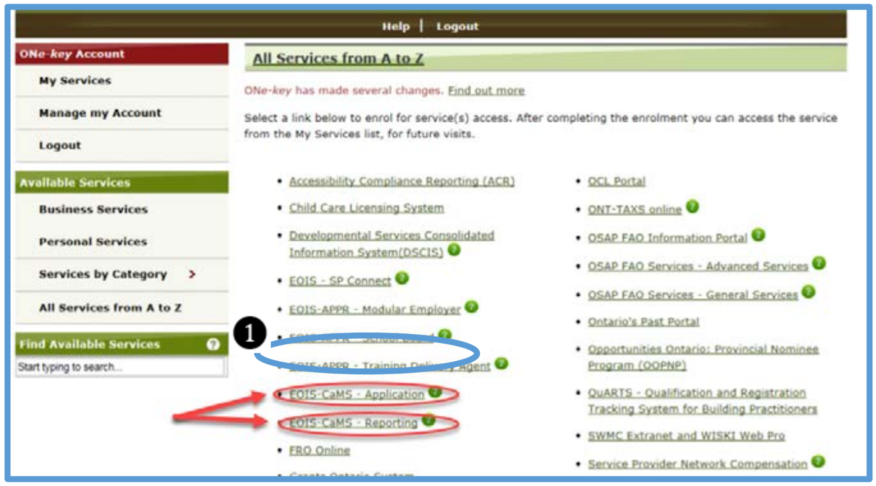
7 Review the **Confirmation** and **Continue.**



Enrolling in EOIS-CaMS

All the services will be displayed according to your assigned user role within your organization.

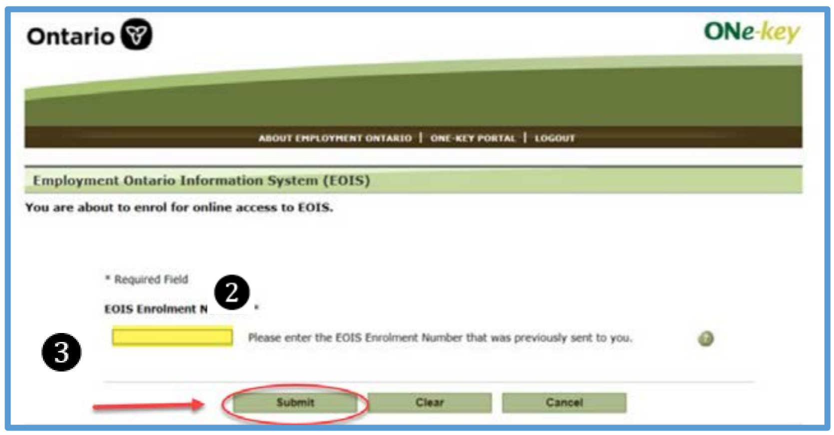
❶ Click **EOIS-CaMS – Applications**.



❷ Enter the **Enrolment Number.**

- The Enrolment Number is located in the first email. This number is only entered once to enroll into CaMS.

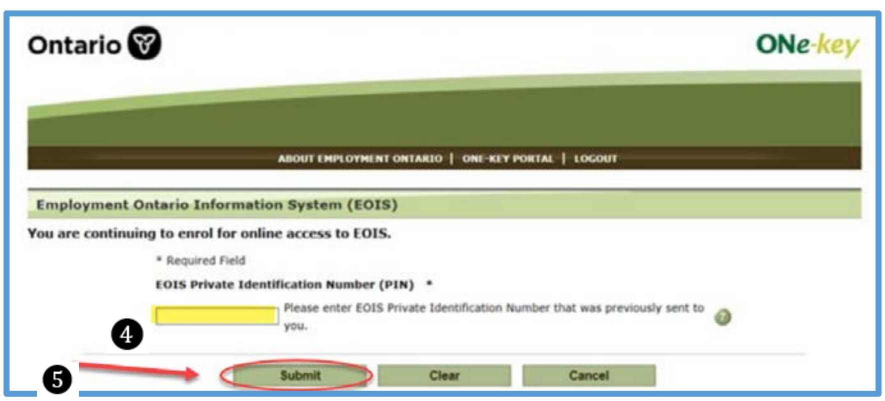
❸ Click **Submit**.



❹Enter your **PIN.**

- The PIN is located in the second email. This number will need to be entered every time the user logs in.

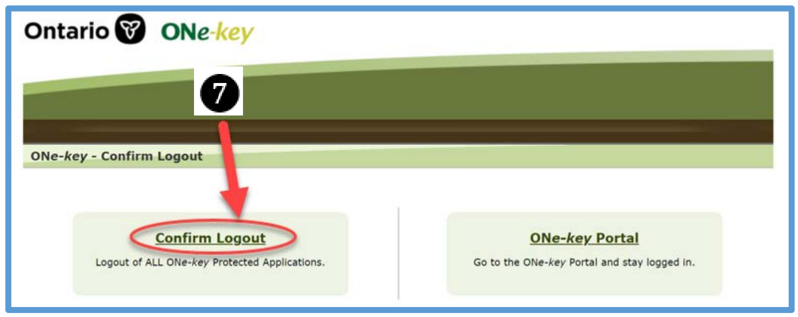
❺ Click **Submit**.



Note: It may take a moment to load the Home page; please DO NOT use the refresh button while you are waiting.

❻ Read the **Terms and Conditions** and click **I agree.**

❼ Click **Confirm Logout to exit**. This will bring up bring up the home screen.

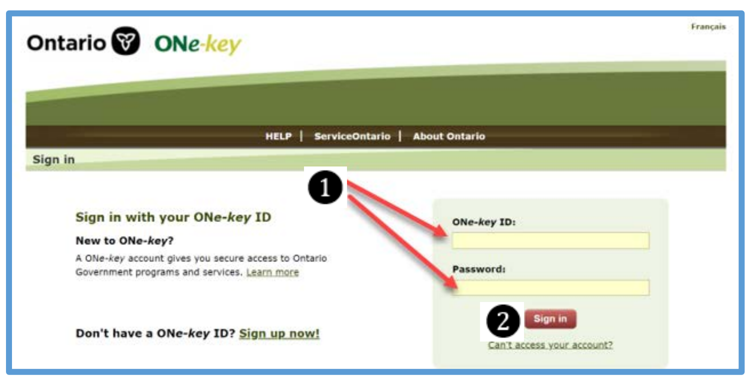


Logging into EOIS-CaMS

On the home screen, the user will have login in with their new credentials.

❶ Enter the username and Password created.

❷ Click **Sign in.**

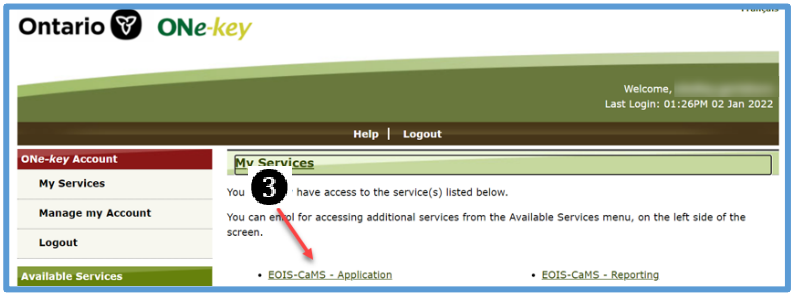


Note:. Please do not click on the **SIGN UP NOW!** link again.

The appropriate services will now have to be selected.

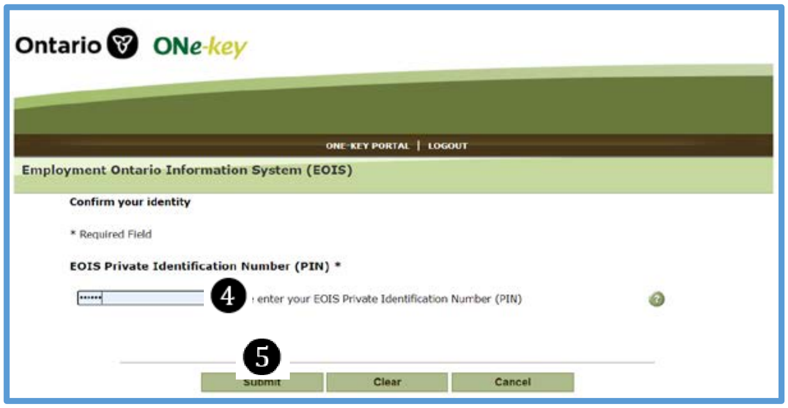
- **EOIS-CaMS – Application** is for client/learner data entry.
- **EOIS-CaMS – Reporting** is for viewing program reports. (This will be explained later in the guide.)

❸ Click on **EOIS – CaMS – Application.**



❹ Enter your PIN.

❺ Click **Submit.**



Your access is now set up for the EOIS-CaMS system.

Registering and Creating a Service Plan

Each participant in LBS must have a service plan in EOIS-CaMS.

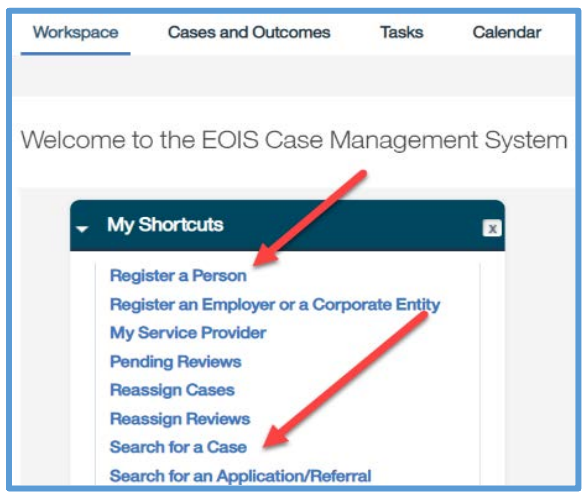
Follow the steps in this section to create the Service Plan.

NOTE: Remember to "save" information frequently and to log out when you are finished. The system will automatically disconnect you after 15 minutes of inactivity.

Registering a Client

Searching for a Client's Record

The following EOIS-CaMS system screen will appear after you log in. The client's Participant Registration Form (PRF) will be used to enter the required data into CaMS.



❶ Perform a person search by selecting **Register a Person**.

- It is important to make sure that the client is not already registered.

There are many different ways to search for a client's record.

❷ Enter client information.

a. Enter the SIN number in the Reference Number field and click **Search.**

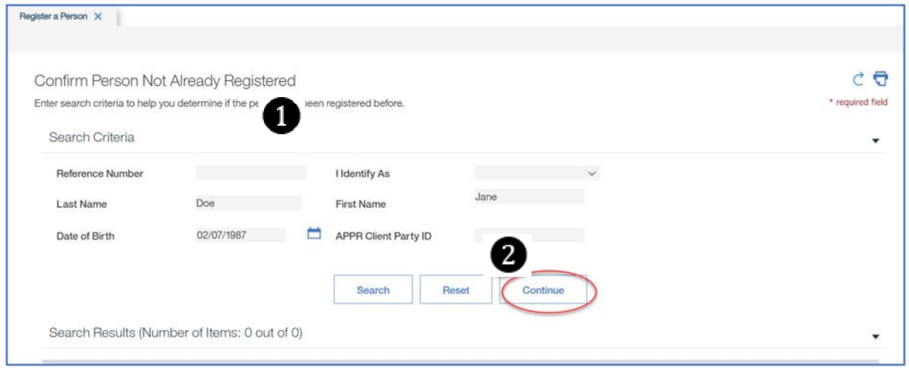
If nothing is found,

b. Enter the Last Name, First Name and Date of Birth and then click **Search**.

Note: The more information provided, the narrower the search results will be. Also, note that all dates in CaMS are entered in the following format: **DD/MM/YYYY**.

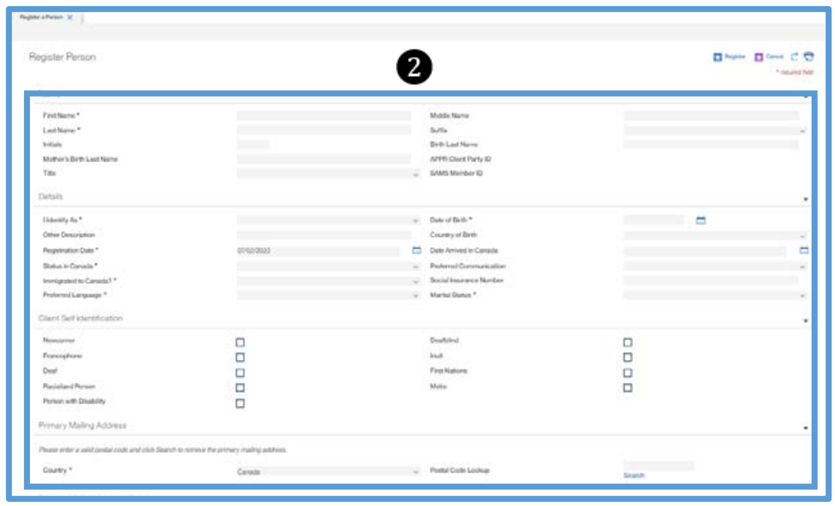
Creating a new Client Record

❶ Click **Continue.**



❷ Enter all the mandatory fields (*) in the Register Person page and enter the address as shown in the Navigating section.

Note: Although the SIN number does not have an asterisk, it is a mandatory field.

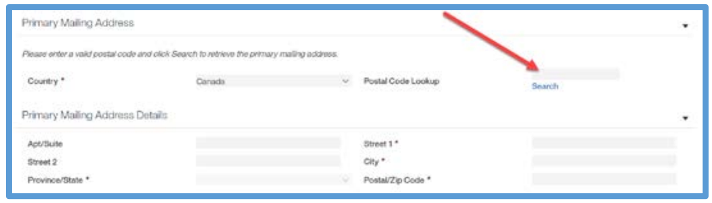


❸ Then click on **Register** to create a new record.

Postal Code Look-Up Feature:

Addresses in the system are entered using a centralized postal code look-up application. When the user enters a postal code and clicks Search, the Canada Post look-up page will load a list of all addresses in that postal code area.

1. Postal code does not exist or is incorrect:
    - Verify the postal code on Canada Post's website.
    - Contact the client to confirm proper address information.



2. Address exists but is not found:
    - Type "**Invalid**" in the postal code field, click Search and then enter the address manually.
3. Canada Post weblink: https://www.canadapost-postescanada.ca/info/mc/personal/postalcode/fpc.jsf

.

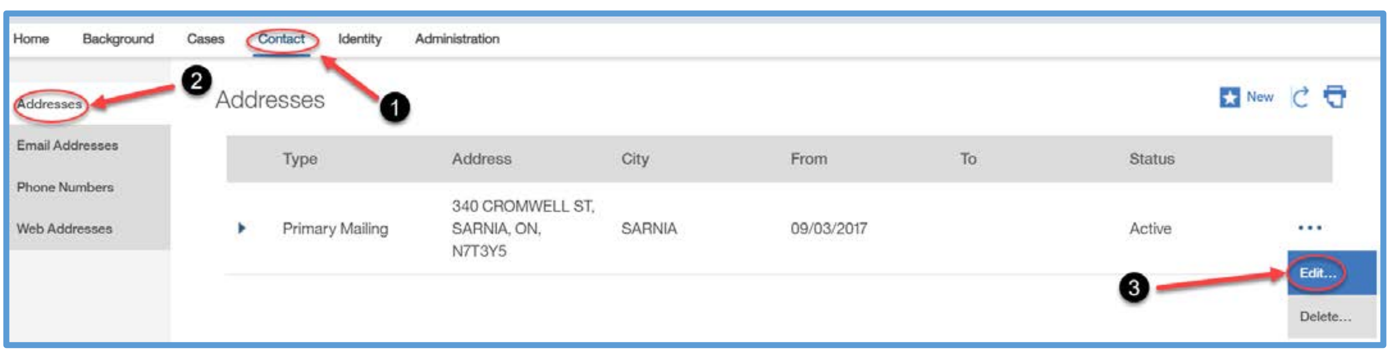
Modifying Addresses

<u>Start from the Person Home Page:</u>

❶ Click on the **Contact** tab.

❷ Select **Addresses** in the tab content bar.

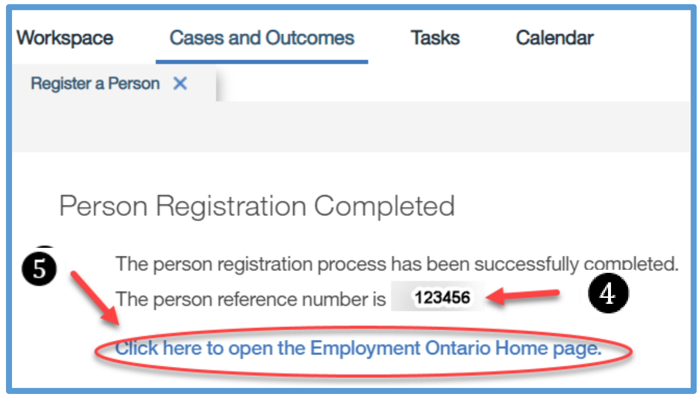
❸ Click **Edit** in the **Action Button** next to the address that requires modification.



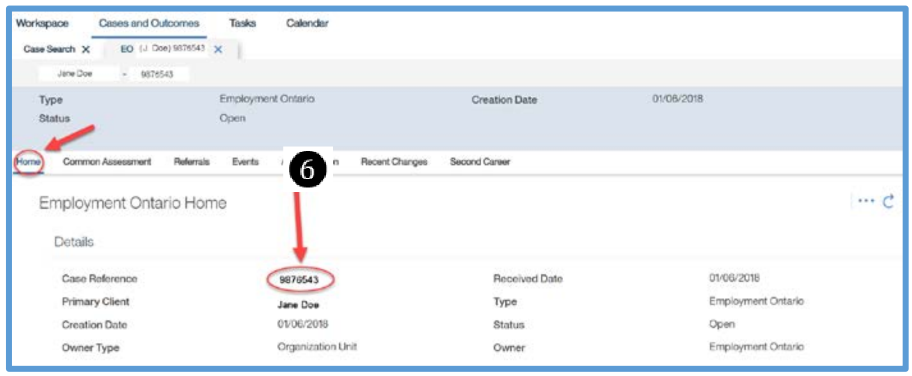
Caution: Do not click **New** to change an address. This may result in overpayments for clients with active product delivery cases who are registered in other EO programs.

❹ A message will appear confirming that the Person Registration is complete and generated a Person Reference number.

❺ Click on ***Click here to open the Employment Ontario Home page*** to create a new Employment Ontario (EO) Case.



❻ A new screen will pop up called the Employment Ontario Home Page. You will need to write the Case Reference Number at the top of the Participant Registration Form (PRF).



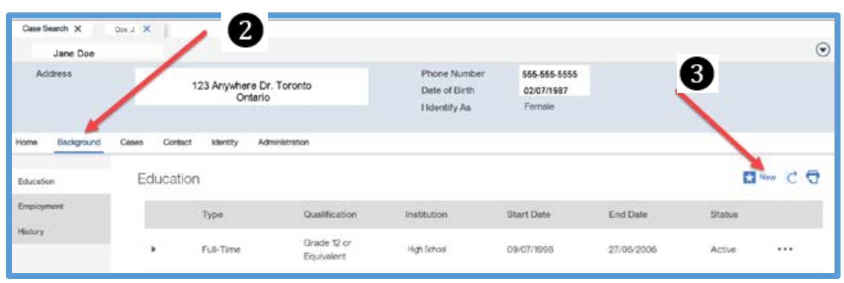
Adding Education and Employment Information

Enter the Education information

❶ Click on the client's name

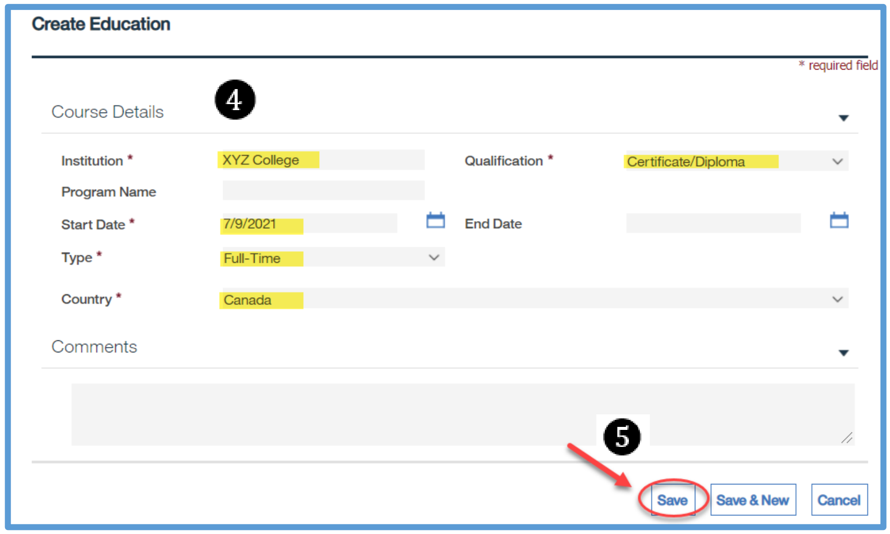
❷ Click on the **Background** tab.

❸ Click on **New** button. The first vertical tab is already on Education.



❹ Enter the information from the Participant Registration Form (PRF).

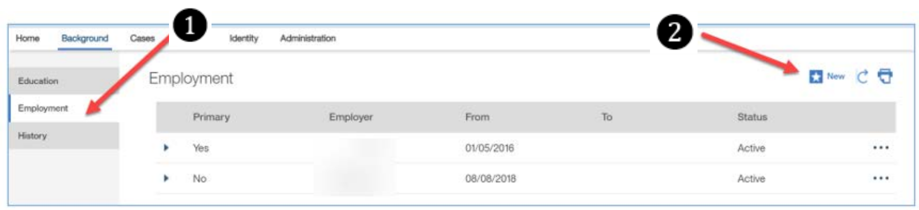
❺ Click **Save**.



Enter the Employment information (if applicable).

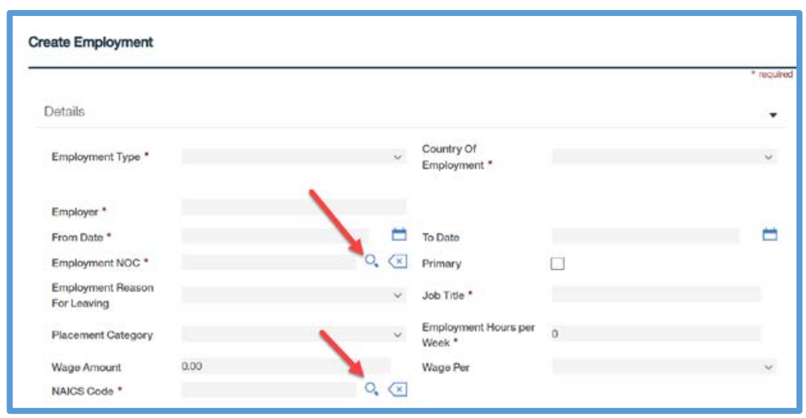
❶ Click **Employment** on the vertical tab.

❷ Click the **New** button.



❸ Enter the information from the PRF.

🔍 National Occupational Classification (**NOC**) codes and the North American Industry Classification System Canada (**NAICS**) codes are entered by clicking on the magnifying glass to the right of the field.

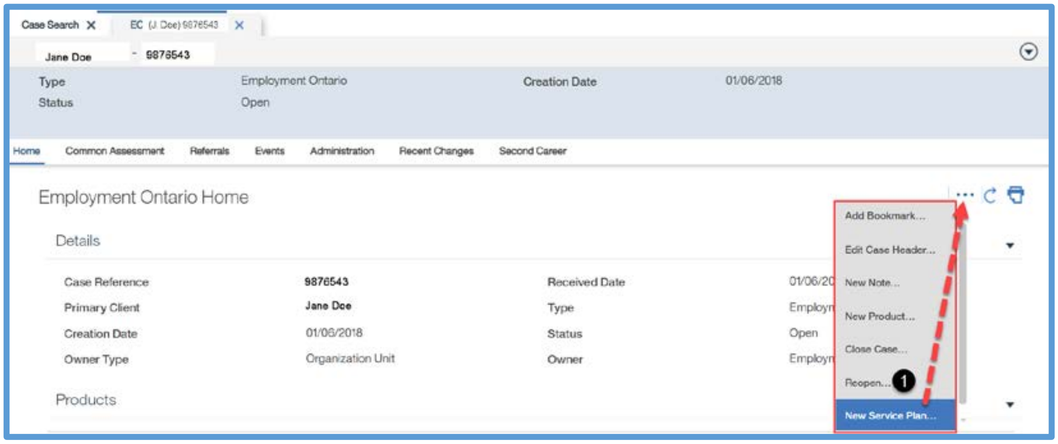


The user will need to look up the NOC and NAICS code before entering this information. This can be done by searching them in a browser.

Note: Each LBS program may collect client data in a different way. It is important for the user to be aware of which data fields are required for their specific program or site.

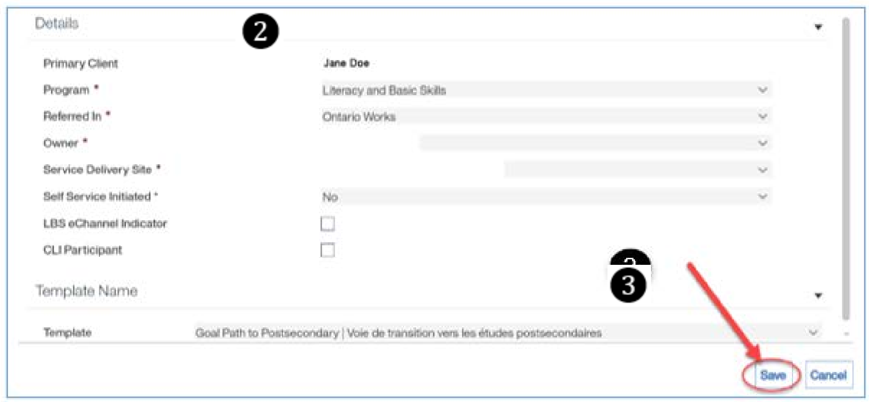
Creating a Service Plan

❶ Go back to the EO Home Page. Click on the Action button and select **New Service Plan** from the drop-down menu.



❷ Complete all the fields.

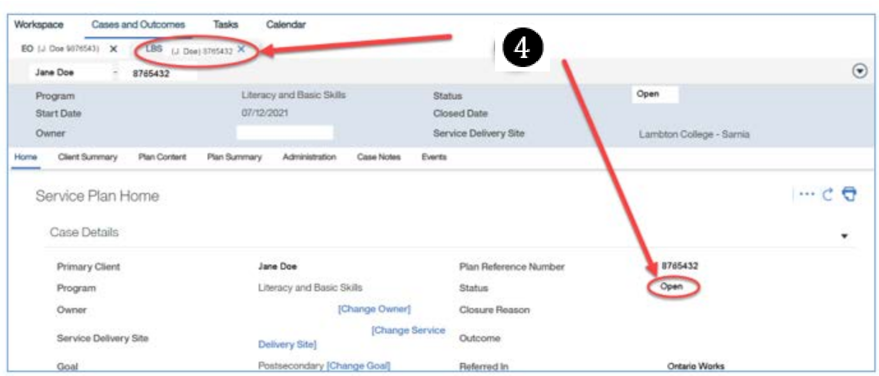
- **Program**: Literacy and Basic Skills
- **Referred In**: located in the client summary on the PRF
- **Owner**: the name of the user
- **Service Delivery Site**: select your appropriate **Service Delivery Site** name
- **Self Service Initiated**: the is when an EOSS application was filled out
- **Template:** this goal path is indicated in the client summary on the PRF



❸ Click **Save**.

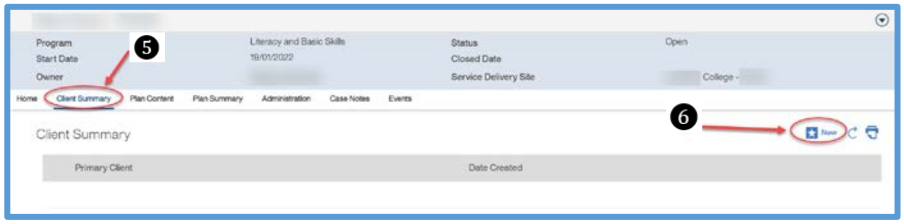
❹ The Service Plan is now created. This number can be recorded at the top of the PRF just above the case and person reference numbers.

Note: the status is “**Open**” as this plan has not been yet submitted for approval within the system.



❺ Click on the **Client Summary** tab.

❻ Click the **New** button.

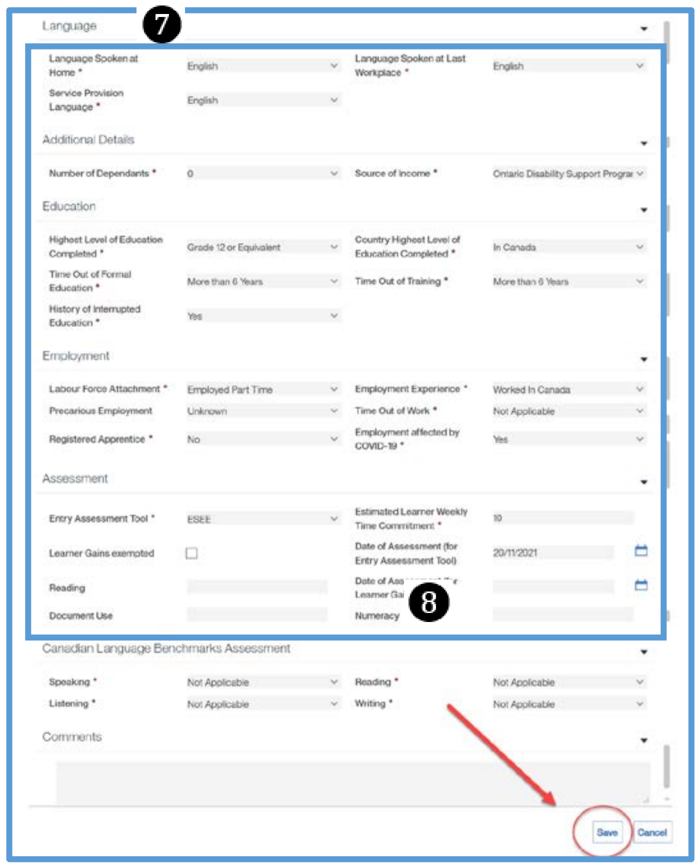


❼ Enter all the applicable fields from the Client Summary on the PRF.

Enter the Assessment information:

- Entry Assessment Tool is the type of assessment used.
- Estimated Learner Weekly Time Commitment is located at the top of the Notice of Decision.
- Date of Assessment (for Entry Assessment Tool) is the date the client completed the assessment.

❽ Click **Save**.



ALMOST THERE! NOW IT'S TIME TO ADD THE SUB-GOAL(S) AND PLAN-ITEM(S) TO COMPLETE THE SERVICE PLAN!

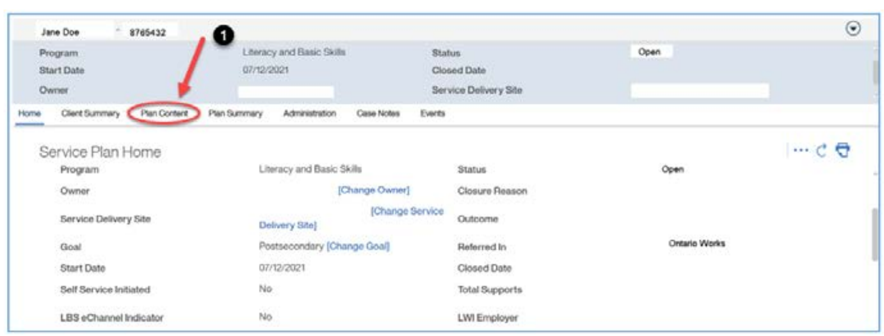
Adding Sub-Goals and Plan-Items to Complete the Service Plan

Adding Sub-Goals and Plan Items

As mentioned in the previous section, each LBS program has its own process for collecting learner data for entry into EOIS-CaMS. Information will need to be provided to enter Sub-Goals and Plan Items.

Sub-Goals and Plan Items can be added at the beginning, during service and before closure of the learner's plan. After adding a Sub-Goal, the user will need to add a Plan Item.

❶ Click on the **Plan Content** tab.



❷ Click on **New Sub-Goal** to add a new Sub-Goal.

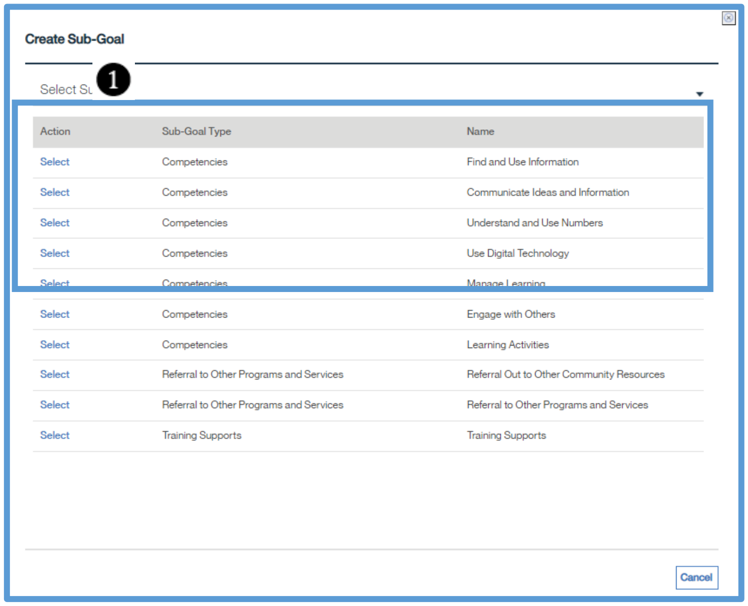
Step 2 is repeated for every Sub-Goal entered.

Milestones

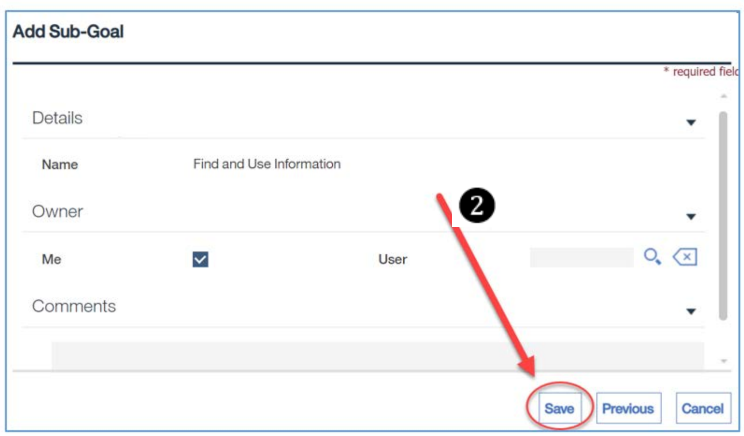
Milestones are assessments that are completed by the learner during their time in the program. All the milestone information is located at the top of the milestone assessment document.

Adding the Millstone Sub-Goal

❶ Select the milestone Sub-Goal.



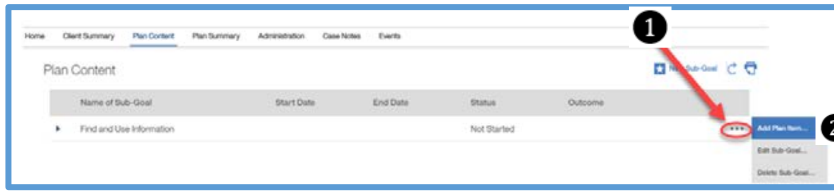
❷ Click **Save.**



Adding the Milestone Item Plan

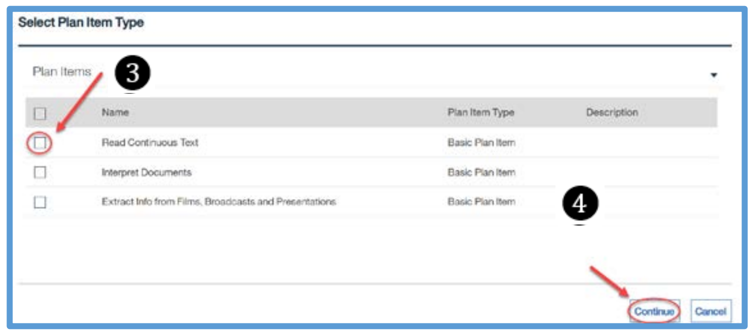
1 Click the **Action Button** within the Plan Content.

2 Select **Add Plan Item.**



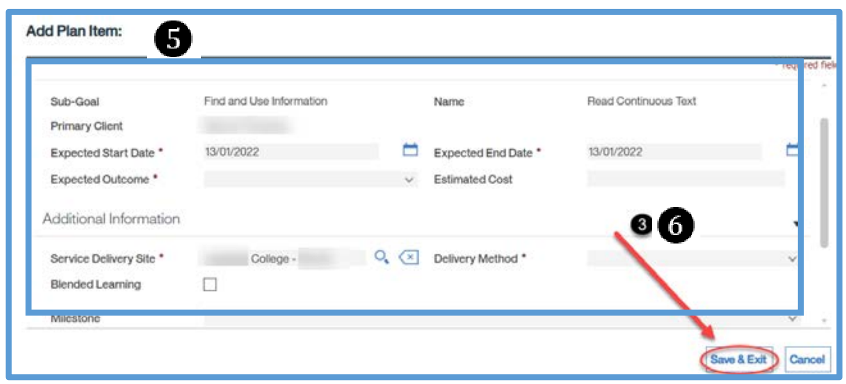
3 Select the appropriate **Plan Item.**

4 Click **Continue.**



5 Complete fields as required.

- ***Expected Start Date*** and ***Expected End Date****:* Use your organization's defined dates or the system's default dates.
- ***Expected Outcome***: Use the drop-down menu to select the appropriate value.



- ***Delivery Method:*** Use the drop-down menu to select the appropriate value.
- ***Milestone***: If known at this point, use the drop-down menu to select the correct Milestone number.

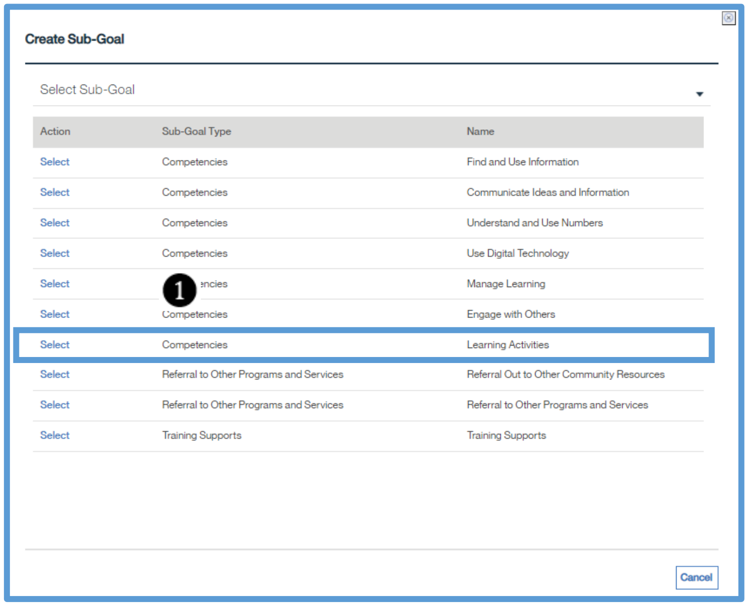
6 Click **Save**.

Learning Activities

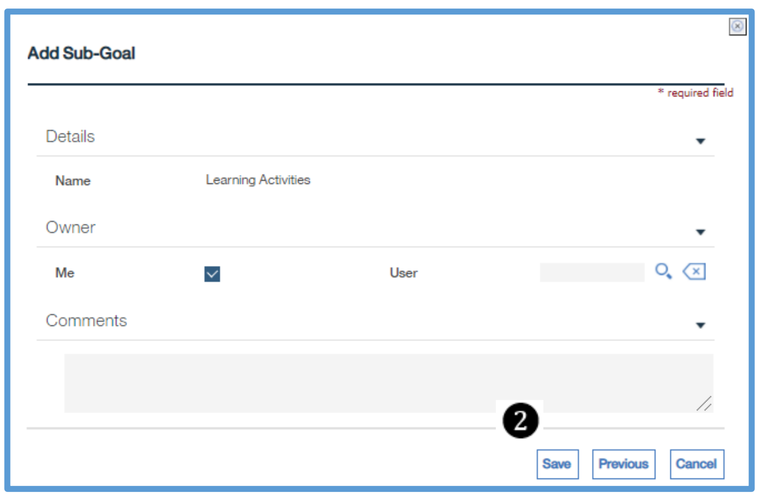
Learning Activities are defined by the LBS program and can include a variety of content such as lessons, assignments, workshops, etc. that are completed by the learner during their time in the program.

Adding the Learning Activities Sub-Goal

❶ Select Learning Activities Sub-Goal.

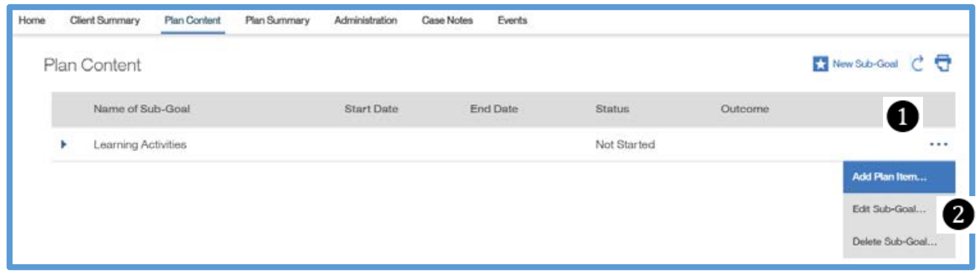


❷ Click **Save.**

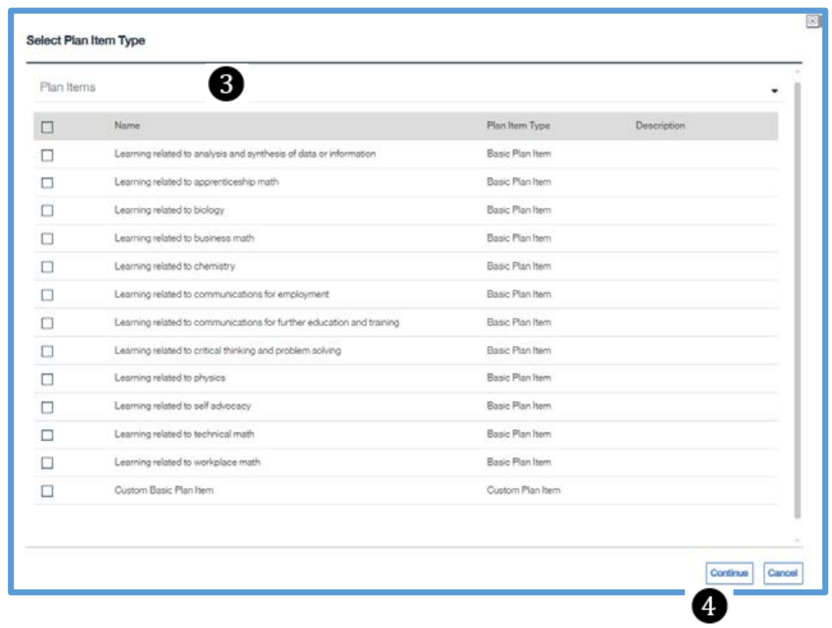


Adding the Learning Activities Plan Item

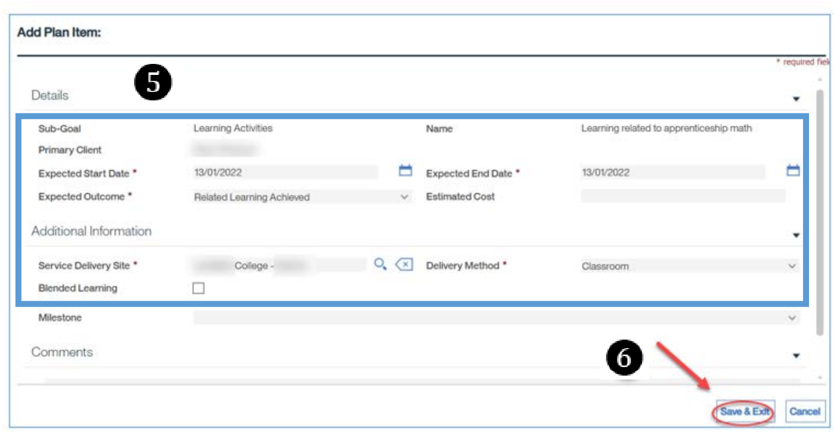
1. Click the **Action Button** within the Plan Content.
2. Select **Add Plan Item**.



3. Select the appropriate **Plan Item.**
   - Most Learning Activities are straightforward. Check with your program for more information.
   - Custom Basic Plan Item is used when a Plan Item is not on the list. Check with your program for more information.
4. Click **Continue.**



5. Complete fields as required.
   - ***"Expected Start"** and **"Expected End"*** **Date:** Enter your defined dates; otherwise, the system will use defaults.
   - ***Expected Outcome:*** There is only one available option to choose which is ***Related Learning Achieved***.
   - ***Deliver Method:*** Use the drop-down menu to select the appropriate value.



Note: Milestone is not a mandatory field for this plan.

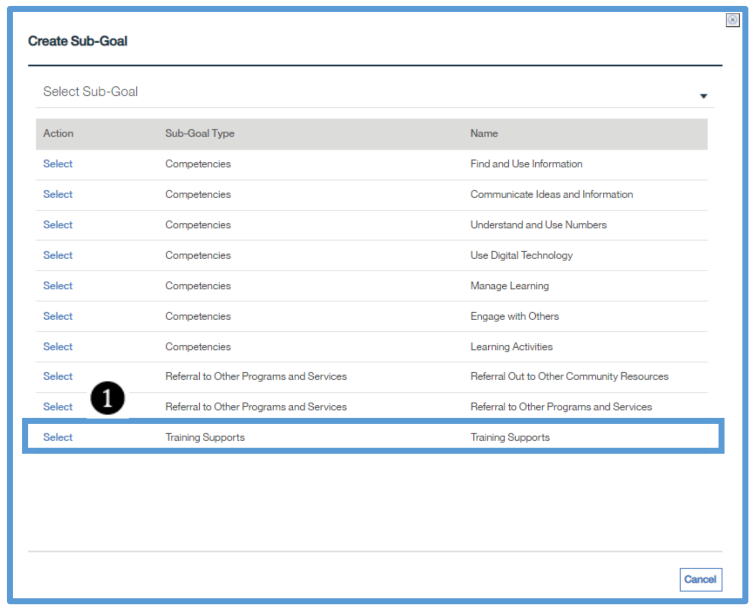
6. Click **Save**.

Training Supports

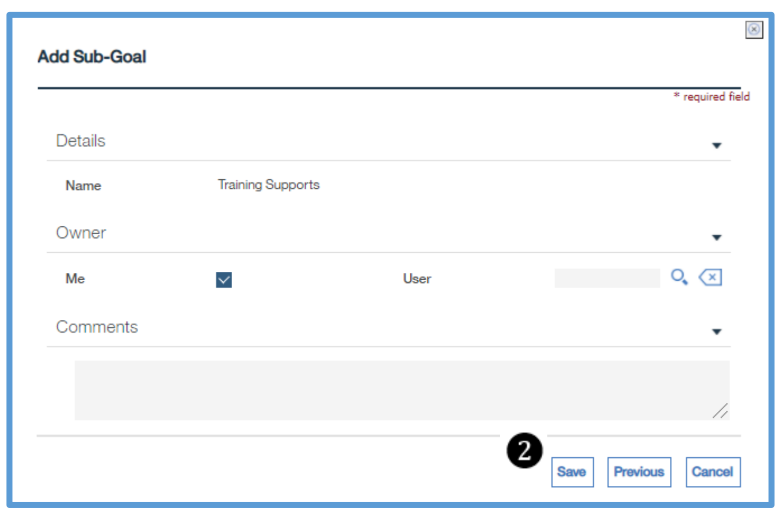
Most LBS programs provide Training Supports. These are normally financial supports to help eligible learners with expenses for childcare and transportation, and sometimes other types of support.

Adding the Training Supports Sub-Goal

❶ Select the Training Supports Sub-Goal.



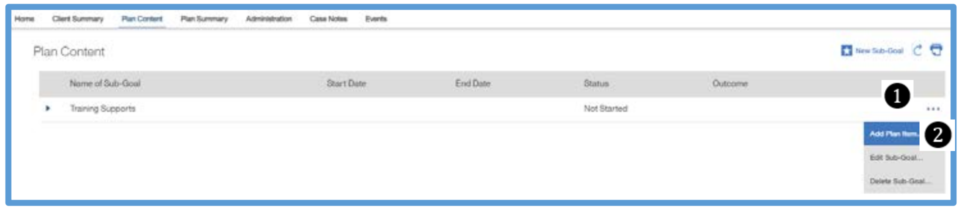
❷ Click **Save.**



Adding the Training Support Plan Item

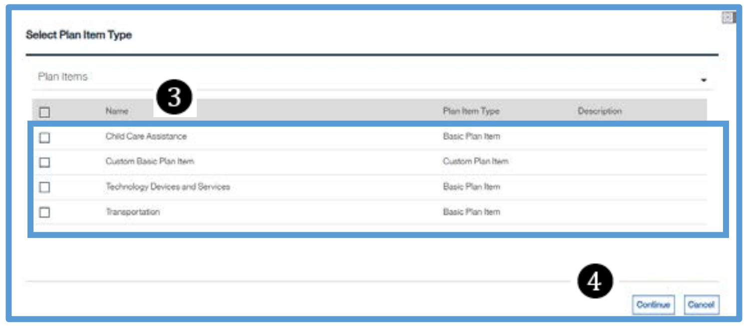
❶ Click the **Action Button** within the Plan Content.

❷ Select **Add Plan Item**.



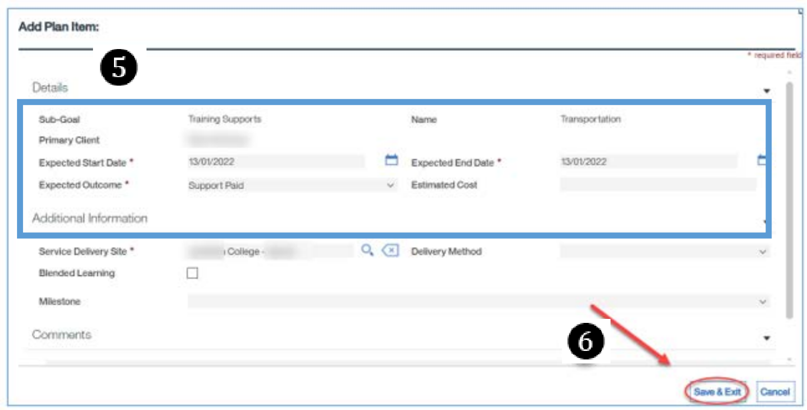
❸ Select the appropriate **Plan Item.**

❹ Click **Continue.**



❺ Complete the fields as required.

- ***Expected Start Date*** and ***Expected End Date:*** Enter the dates with the starting date of supports and the end of the fiscal year. If a learner is still receiving supports after March 31st of that year, a new item plan will have to be added.
- ***Expected Outcome:*** the only option is ***Support Paid***.
- ***Estimated Cost:*** Enter estimated cost for defined start and end date.



Note: Delivery Method and Milestone are not required for this Plan Item.

❻ Click **Save & Exit.**

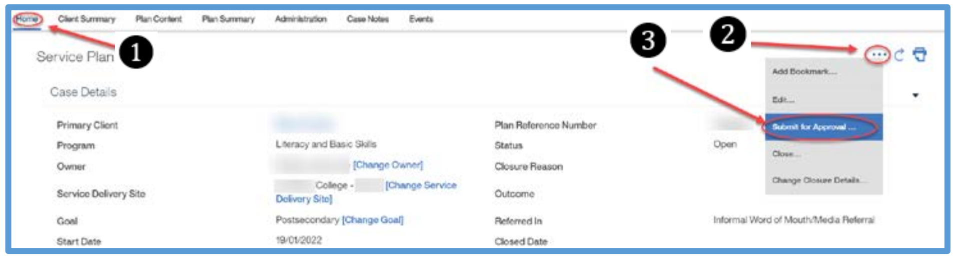
Approving the Service Plan

Once all the Sub-Goals and Plan Items are added, the user is now ready to submit the service plan for approval.

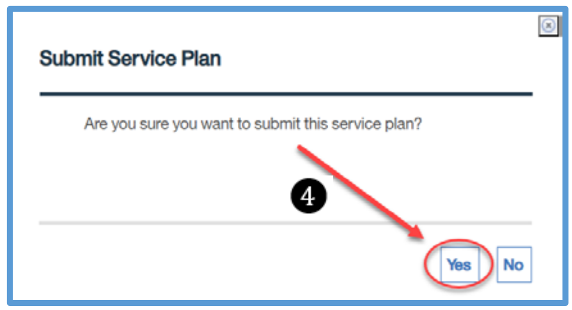
❶ Click on the **Home** tab.

❷ Click the **Action Button**.

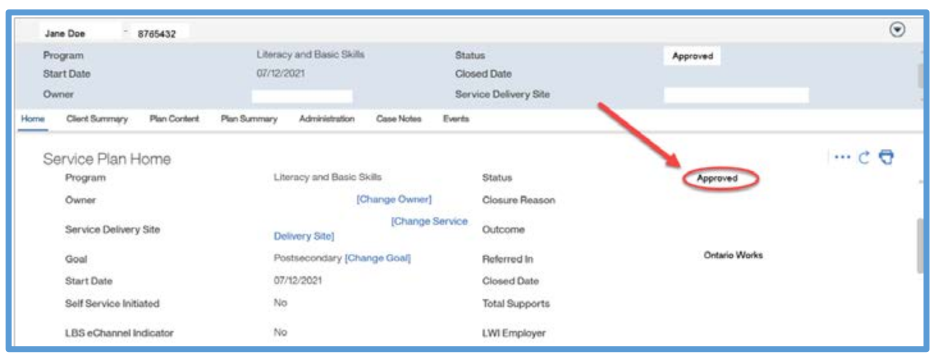
❸ Select **Submit for Approval.**



❹ When prompted to confirm the submission, click **Yes**.



The Service Plan will now display as **Approved**.



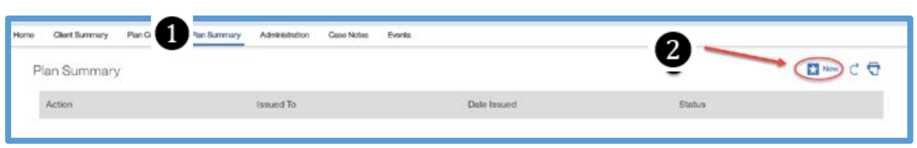
Creating a Plan Summary

The user will now have to create the Plan Summary.

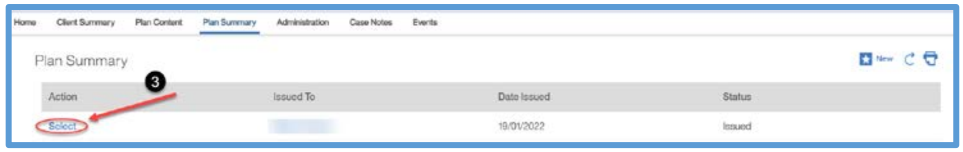
❶ Click on the **Plan Summary.**

❷ Click **New** button.

The Plan Summary is now created.



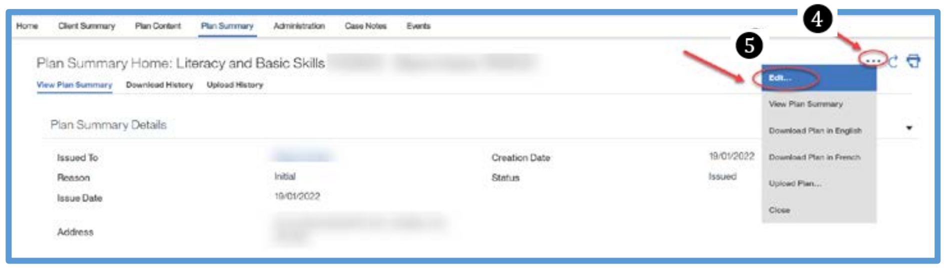
❸ Click **Select**.



Note: The system populates the client's information and address. The "**Date Issued**" is set to the current date and the "**Reason**" is set to initial.

❹ Click the **Action Button.**

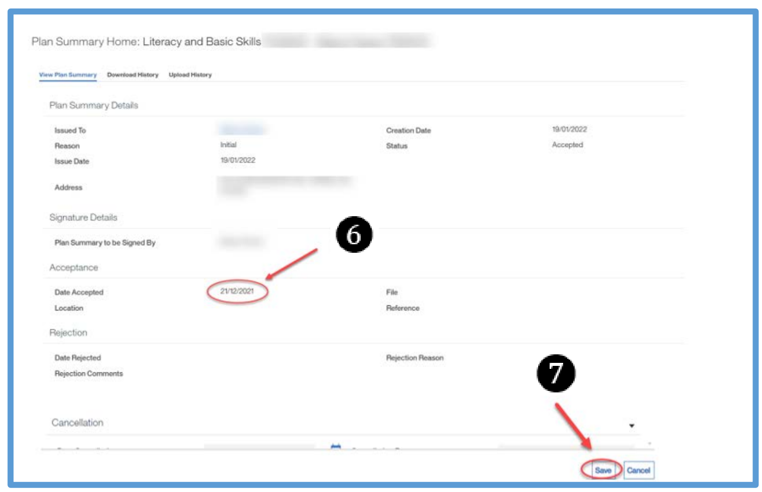
❺ Select **Edit.**



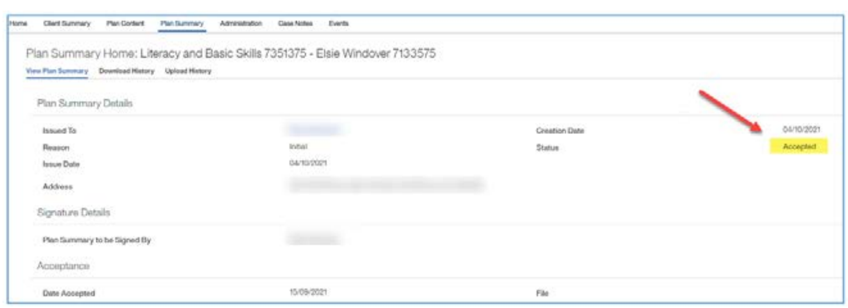
❻ Enter the date the learner accepted the learner plan in the ***Date Accepted*** field.

❼ Click **Save**.

Note: The **Date Accepted** will be determined by your own LBS program.



The status of the service plan has now changed to ***Accepted*.**



Printing, Downloading and Uploading the Enhanced Learner Plan

Each participant in the LBS program must have a Learner Plan (LP) on file. Updates to the LP must be entered in CaMS regularly.

LBS programs can choose whether or not to use the Ministry-designed ***Enhanced Learner Plan*** (ELP) available in CaMS. If your program/site does not use the ELP, there will be a locally developed Learner Plan in use instead of the ELP.

If used, the ELP is electronically generated and populated with data that has been entered into CaMS for each learner.

Each location may utilize the following options differently, so it is important to be familiar with which processes are most beneficial to your individual LBS site.

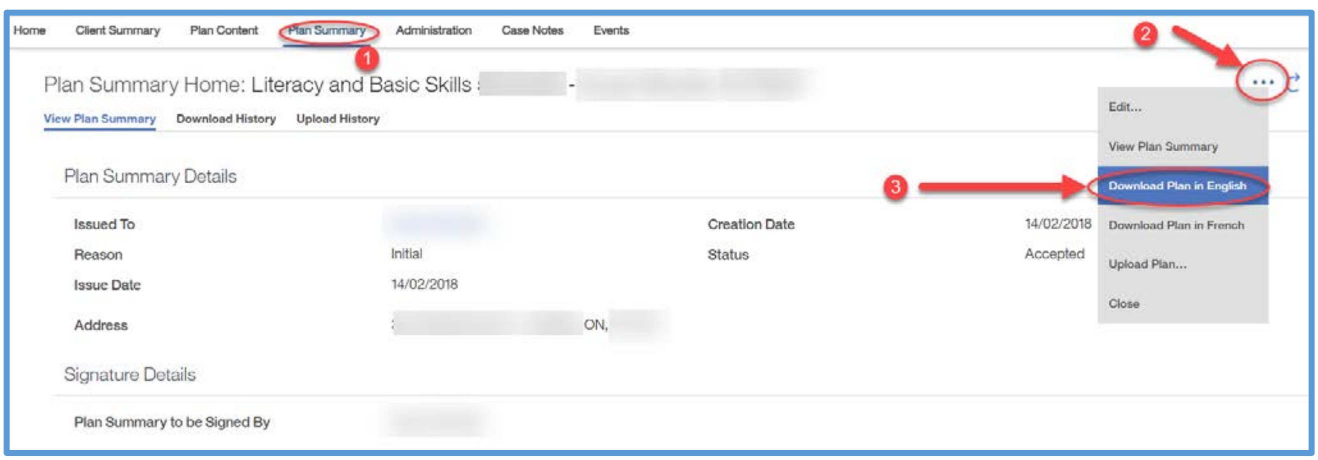
Downloading & Printing the ELP

To print the Enhanced Learner Plan:

❶ Click the **Plan Summary** tab.

❷ Click the **Action Button**.

❸ Select **Download Plan in English or French** (depending on which language client prefers).



Once the ELP is downloaded in a PDF format, two copies can be printed to have the learner sign. One copy goes to the learner and the other goes into the learner file. A copy can also be saved on a secure drive.

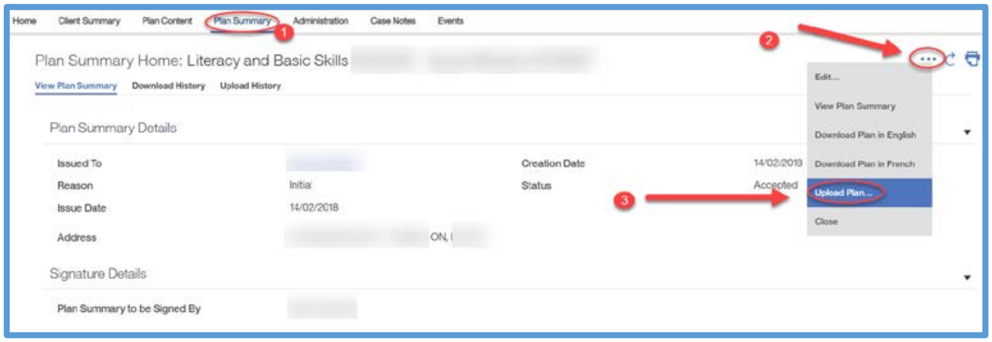
Uploading the ELP

To upload the saved ELP to the CaMS system:

❶ Go to **Plan Summary**.

❷ Click on the **Action Button.**

❸ Select the saved ELP that you want to upload.

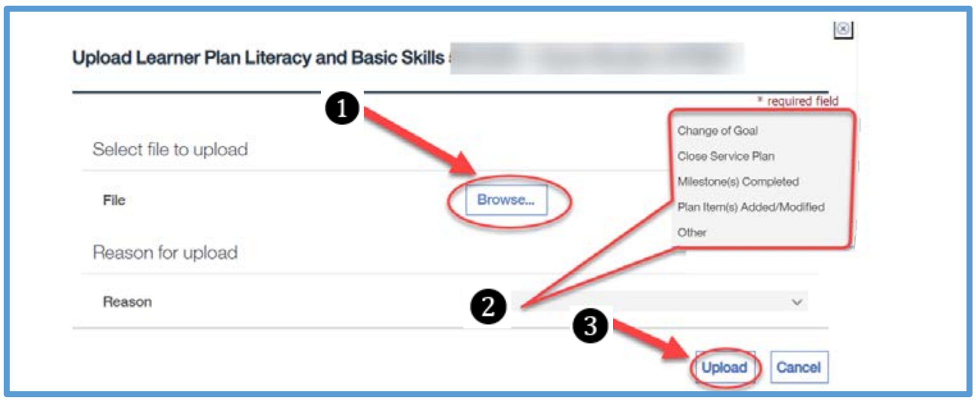


The following screen will appear.

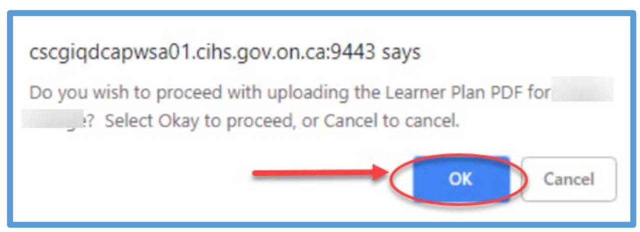
❶ Click on **Browse** to retrieve your saved ELP file.

❷ Select Reason for upload.

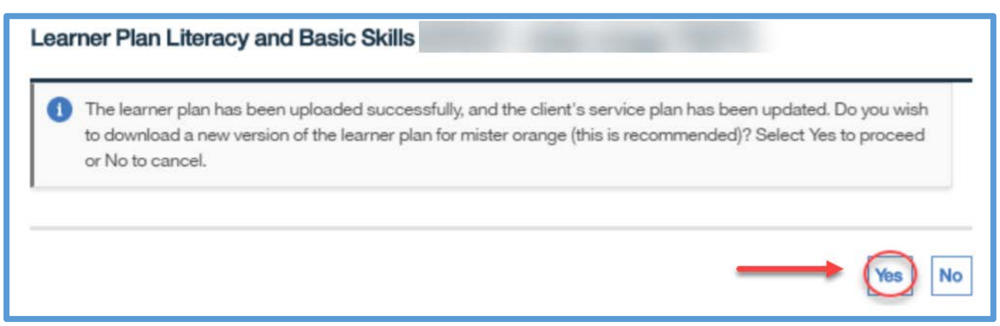
❸ Click on **Upload**.



You will need to confirm the upload by clicking **OK**. The ELP is now available to be viewed under the ***Upload History.*** This process can be maintained until the ELP is ready to be closed (when the learner exits from your LBS program). Make sure to always save and upload the latest ELP updates to CaMS.



You will be prompted to click **Yes** to proceed if the system detects a previous uploaded plan.



THE SERVICE PLAN IS NOW ACTIVATED!

Adding/Modifying/Deleting or Canceling Sub-Goals

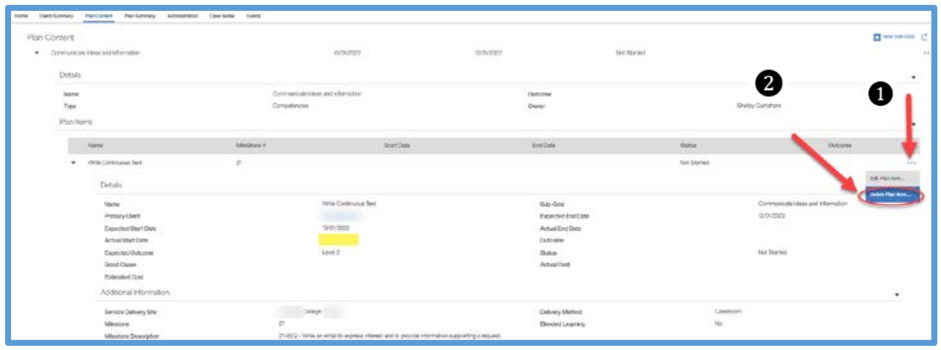
It is likely that you will need to Add/Modify/Delete or Cancel Sub-Goals and Plan Items. Each LBS program may have a different process for these tasks.

Deleting a Plan-Item and Sub-Goal

On the Plan Item:

❶ Click on the **Action Button**.

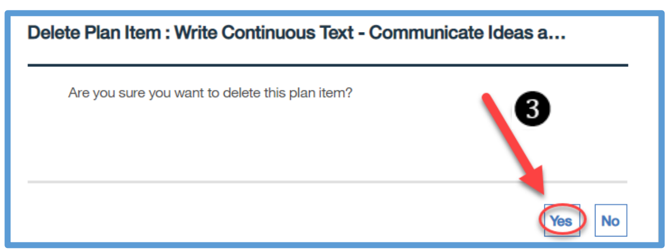
❷ Select **Delete Plan Item.**



If the Plan Item has a date in the Actual Start Date field, it can be deleted by first removing the date and saving, and then deleting it. Each LBS program may have a different process related to deleting Plan Items.

The following screen will appear: If you are certain you want to delete the Plan Item.

❸ Click **Yes**.

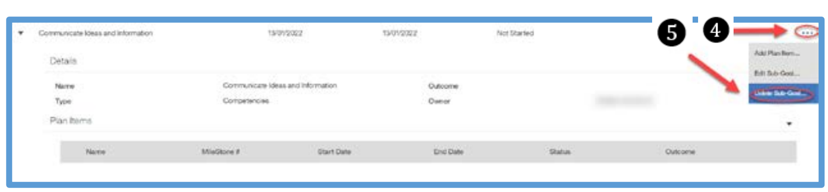


The Plan Item has been removed. The Sub-Goal can now be deleted.

On the Sub-Goal:

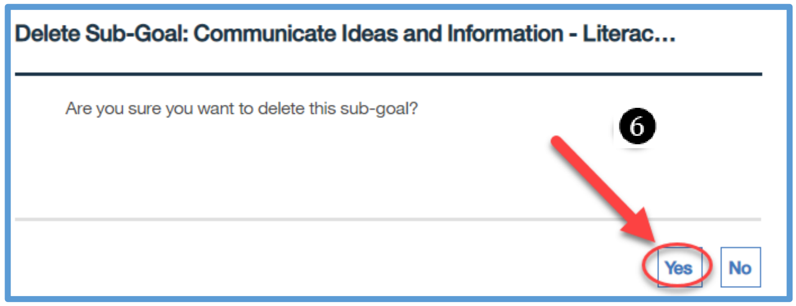
❹ Click the **Action Button**.

❺ Select **Delete Sub-Goal**.



The following screen will appear:

❻ Click **Yes** to accept and remove the Sub-Goal.



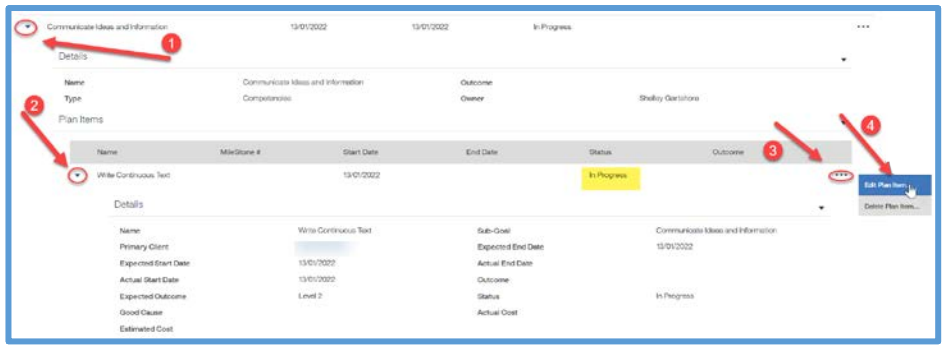
There is another way to remove a Plan-Item.

❶ Click on the toggle arrow of the Sub-Goal.

❷ Then click on the toggle arrow on the Plan Item.

❸ Click on the **Action Button.**

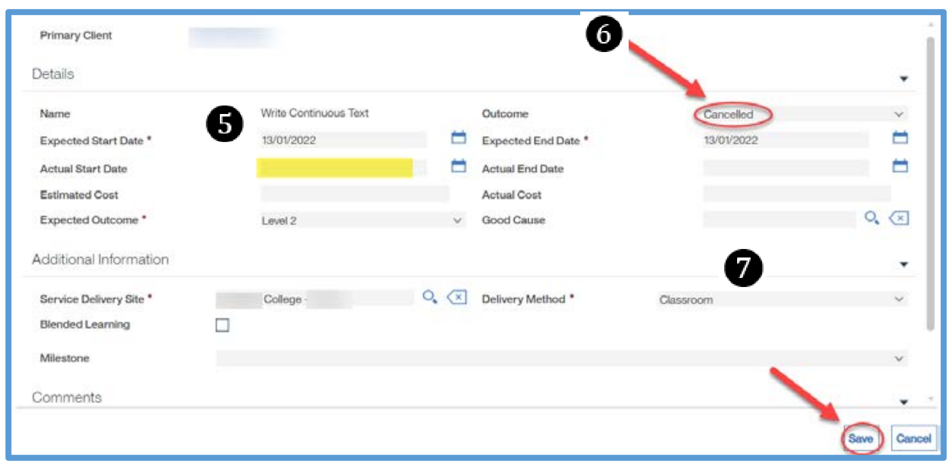
❹ Select **Edit Plan Item.**



❺ Remove the ***Actual Start Date.***

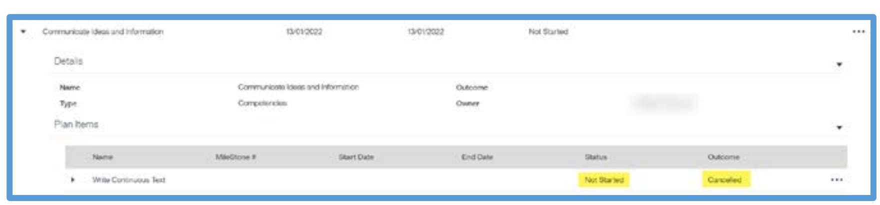
❻ Enter **Cancelled** in ***Outcome.***

❼ Click **Save.**



The status for this Plan Item will now change to ***"Not Started"*** with a ***"Cancelled"*** outcome. You will also see a ***"Not Started"*** status under the Sub-Goal.

You have now successfully removed the plan item.



Closing the Service Plan

Here is a **sample** file checklist to use BEFORE you close a learner's service plan in CaMS. (Be sure to find out what your program includes in its closed files.)

NOTE: once the service plan is closed in CaMS, it cannot be reopened.

If you have any comments to add after closing the file, click on **Change Closure Details**, and use the "Comments" section.

Before closing the service plan, ensure all reported changes to learner information and/or learner plan details are recorded in the file and are up to date in CaMS (address, phone numbers, e-mails, goals, education, employment, dates, etc.)

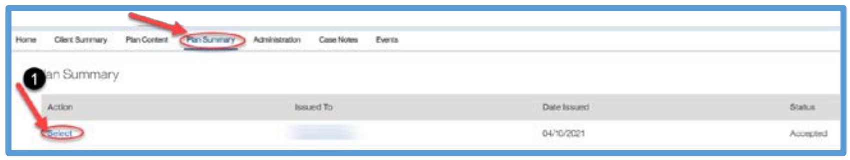
Now you can proceed to close the LBS learner service plan in CaMS. There are two ways to close the file: **Closing the Service Plan by Uploading the Learner Plan** or **Closing a File Manually**.

First, you'll need to log into CaMS and search for the LBS service plan for the learner you wish to close. Review your file checklist, and ensure that everything is completed, entered and up-to date in CaMS for that learner. Set your Sub-Goal outcomes to either **Attained, Not Attained** or **Cancelled**.

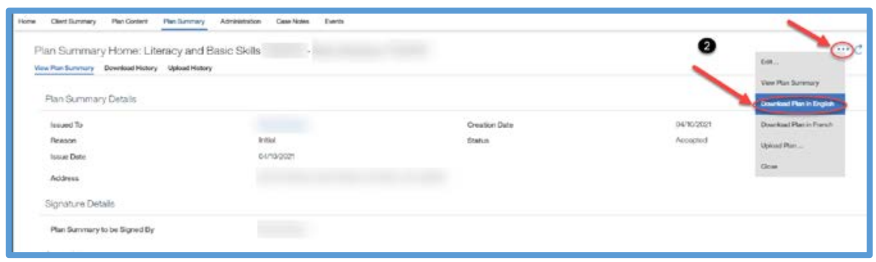
Closing the Service Plan by Uploading the Learner Plan

LBS sites that use the Enhanced Learner Plan (ELP) can upload this document with closure details to automatically close the service plan.

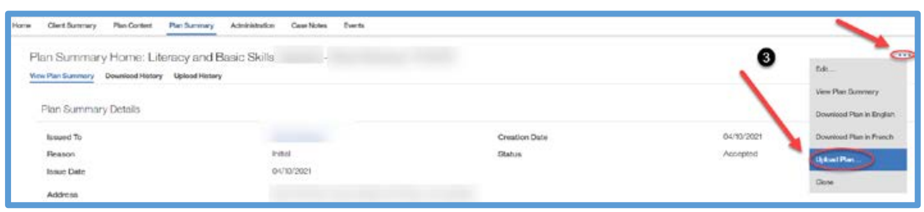
1 Click on **Plan Summary** and then on **Select**.



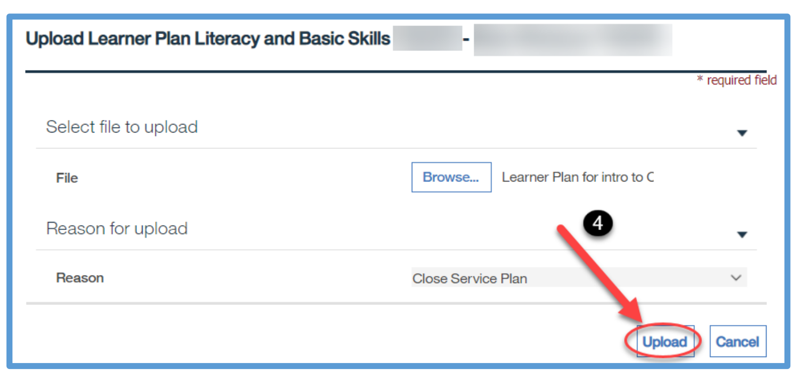
2 Next, download once again the updated ELP and save as a PDF file on a secure drive. Add missing fields (if any) to update the plan. Click **Save**.



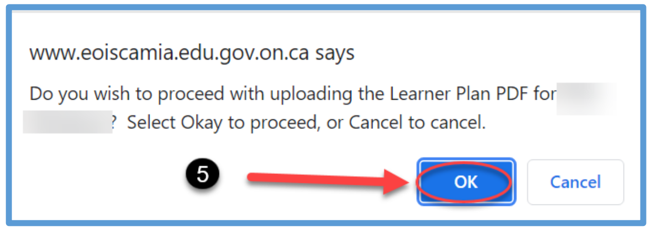
3 You will now retrieve the saved ELP file from your secure drive and then select **Upload Plan**.



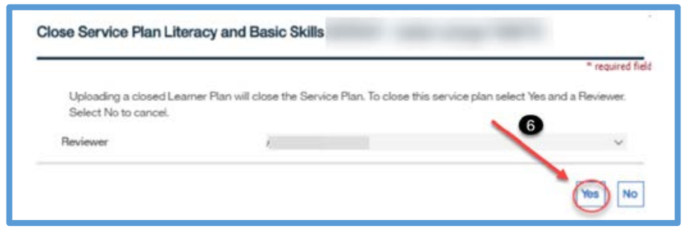
4 The following message will appear on your screen. Retrieve the updated PDF ELP file to upload by clicking **Browse**. Then click **Upload**.



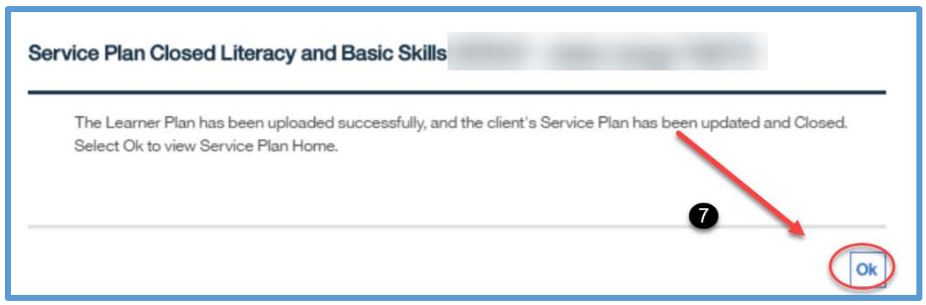
❺ Confirm by clicking **OK**.



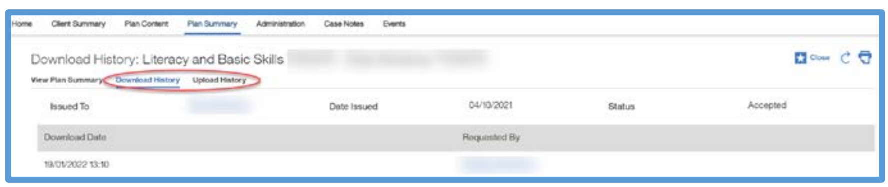
❻ You will need to assign a reviewer. The person you assign will be the person responsible for the mandatory 3, 6, and 12-month "Follow-ups" for this learner.



❼ A confirmation will appear stating you have successfully uploaded, updated and closed the client's service plan.

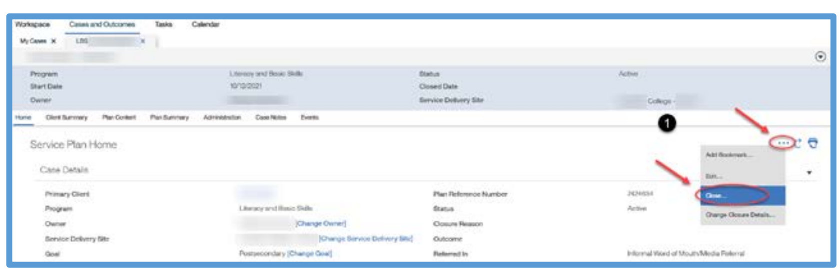


❽ You can view the upload and download history of your files by selecting the appropriate tabs.

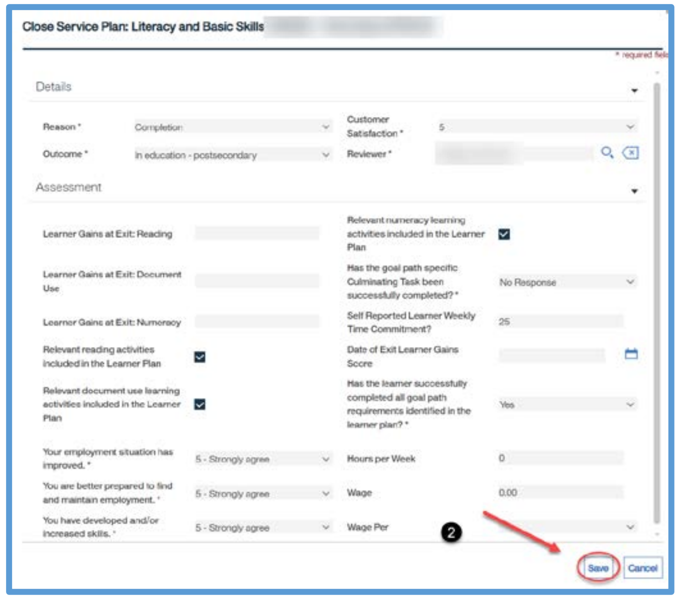


Closing a File Manually

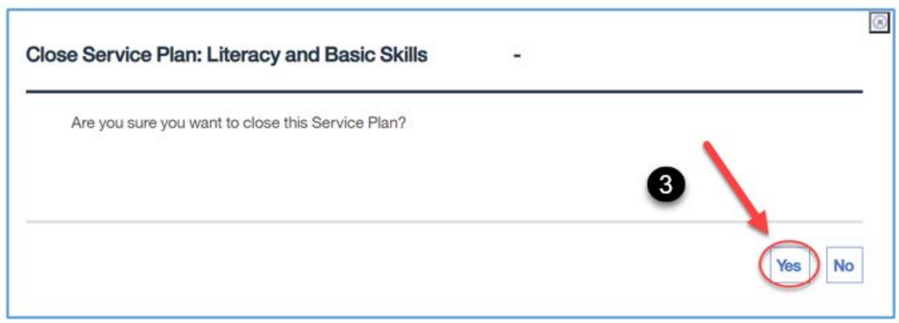
❶ From the Service Plan **Home** tab, click on the **Action Button** and then choose **Close** from the drop-down menu.



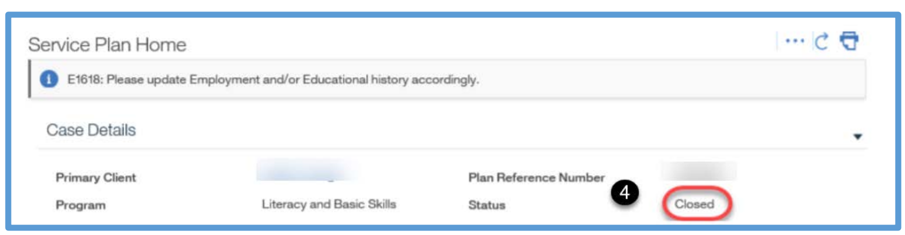
❷ Next, enter all the closure details captured from details of the service plan and noted on the Ministry's Exit Form. Click **Save**.



❸ When you are prompted to confirm that you want to close the service plan, click **Yes**.



❹ A confirmation will appear stating you have successfully closed the client's service plan.



Entering Resource, Information and Referral Data

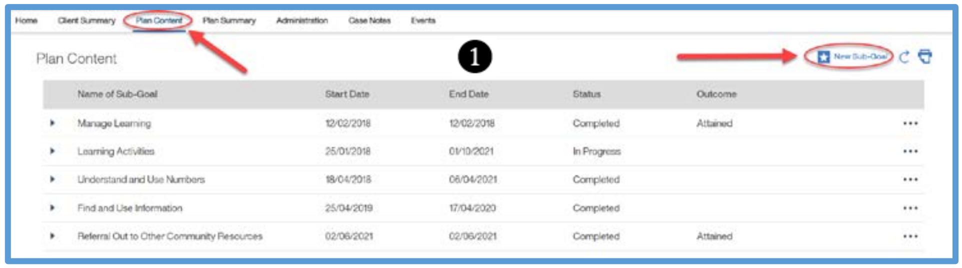
…It's all part of the contract!

Documenting Learner Referrals

Part of the contractual agreement with the Ministry requires that all LBS sites record and document learner referrals made to ***Other Programs and Services.***

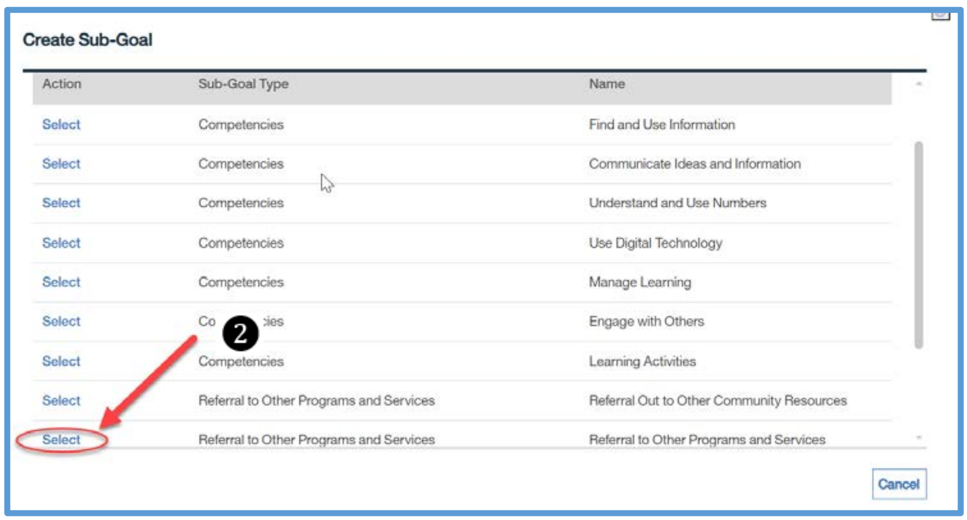
To enter this information into CaMS:

❶ Select **Plan Content** and click on **New Sub-Goal**.



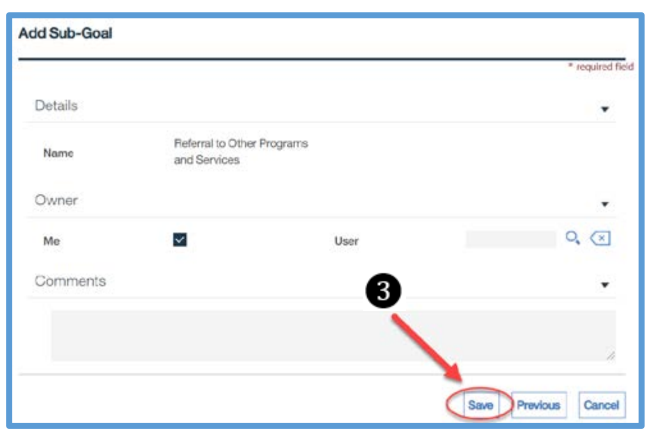
The following screen will appear.

❷ Click on the **Select** button for **Referral to Other Programs and Services**.



Another box will appear for you to confirm.

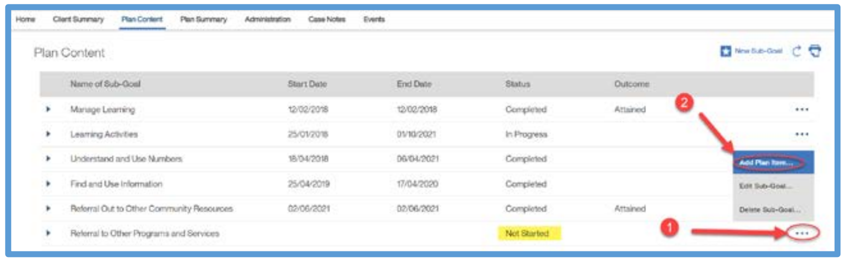
❸ Click **Save**.



This new Sub-Goal will now appear in the list of all Sub-Goals with a status of ***"Not Started."*** Next, you need to:

❶ Click on the **Action Button**.

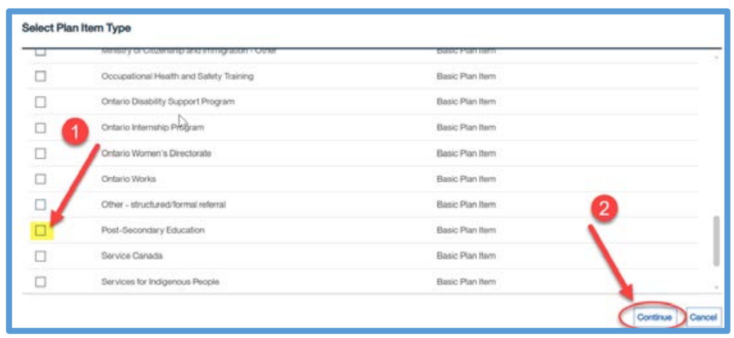
❷ Select **Add Plan Item**.



Note: A good practice for each site is to create a list of community agency names you most often deal with and associate them with this list of Plan Items.

❶ The following screen with "***Select Plan Item Type"*** will appear. For our example, we will choose the **Post-Secondary Education** Plan Item.

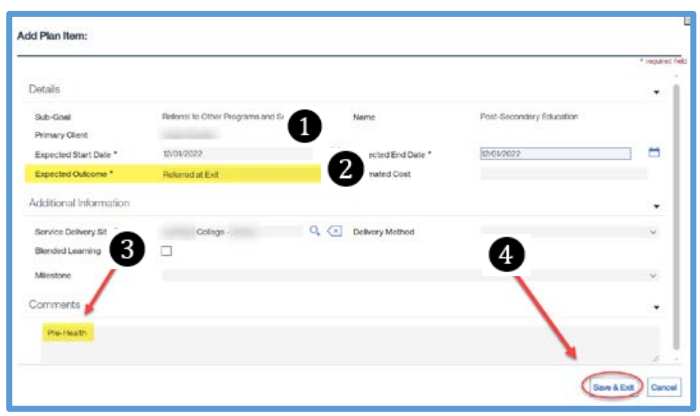
❷ Click **Continue**.



The following screen will appear.

❶ Enter the expected start and end dates; otherwise, CAMS will default to today's date.

❷ Enter the ***"Expected Outcome"*** from the following three choices in the drop-down menu: **Referred at Entrance**, **Referred During Service**, or **Referred at Exit**.



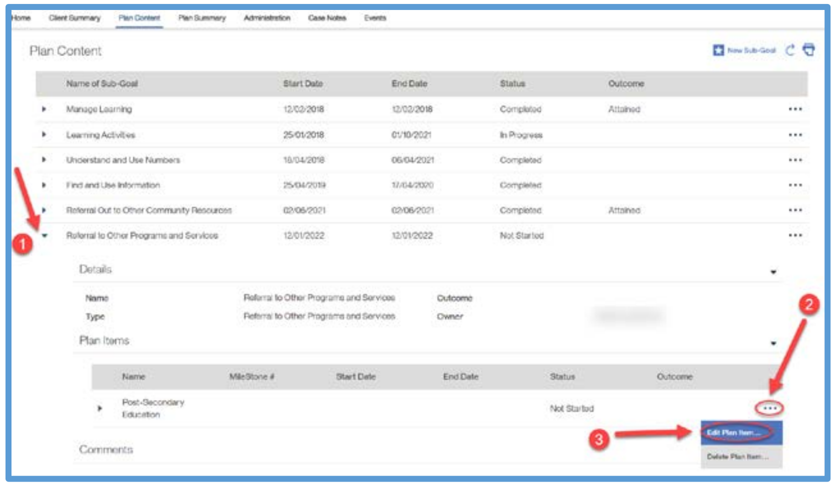
❸ You can add comments if needed. For our example, we will enter that student is taking the post-secondary Pre-Health Program.

❹ Click **Save & Exit.**

❶ Next, click on the ***Referral to Other Program and Services*** toggle arrow.

❷ Click on the **Action Button**

❸ Select **Edit Plan Item.**



Now you will be able to attain the Plan-Item.

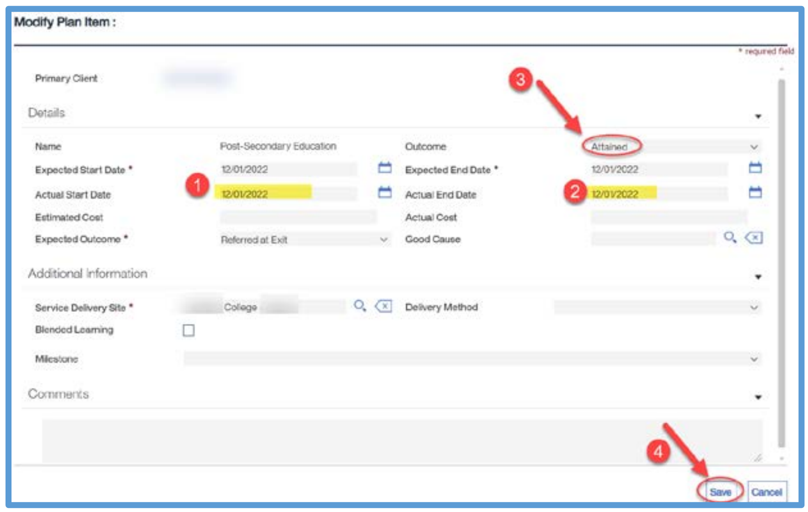
❶ Enter the Actual Start date.

❷ Enter the Actual End Date if the item is completed.

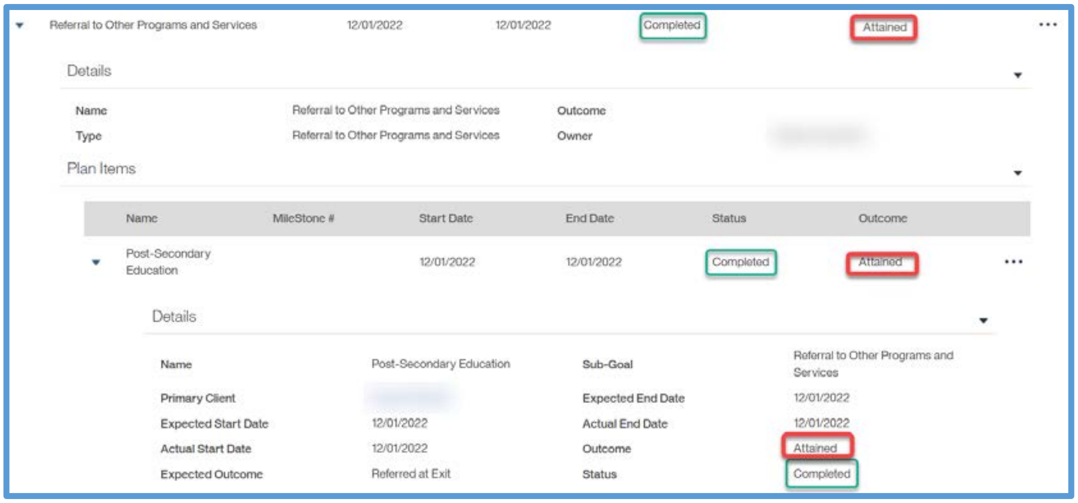
❸ Select the outcome from the drop-down box (**Attained**/**Cancelled**/**Not Attained**).

In this example, the referral was made on the same day it was confirmed, so the dates are all the same.

❹ Click **Save** to exit.



Here's an example of a completed Plan Item with an "**Attained**" outcome. As well, the outcome of the Sub-Goal is completed and "**Attained**."



NOTE: All Sub-Goals need to have a defined OUTCOME (Attained, Not Attained or Cancelled) before the service plan can be closed.

Documenting Unassisted Services

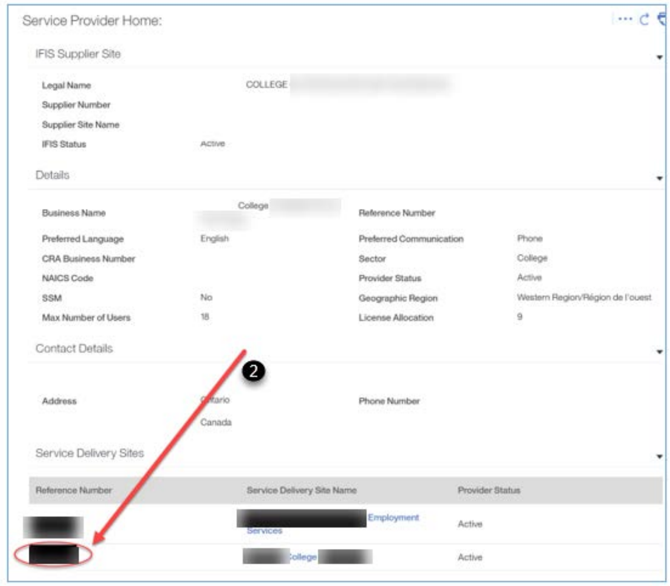
Your agency may also provide unassisted services such as ***"Information Sessions and Outreach"*** activities. As part of your contractual Service Coordination commitment (and as a good practice for client service), your program may refer potential clients to other LBS providers if they are not suitable for service at your program. They may also be referred out to other programs and services in the community. Therefore, these clients never become registered learners at your site.

These types of data are captured and entered on a monthly basis in the ***"Aggregate Data"*** section of CaMS. The steps to enter this information are outlined below.

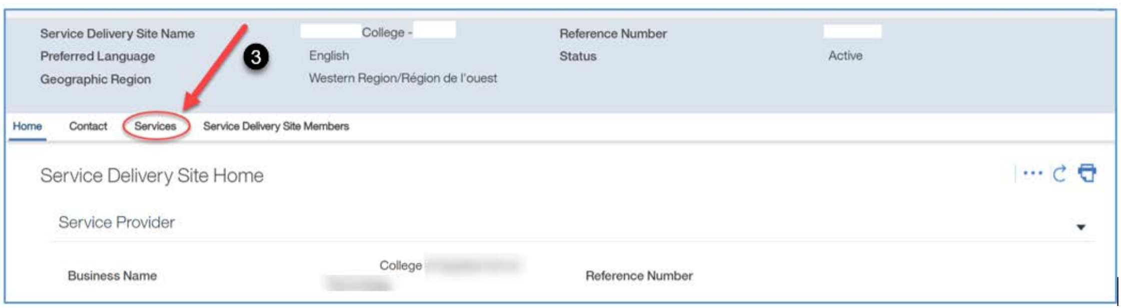
Information Sessions & Outreach Activities

❶ Click on **My Service Provider**: within the "My Shortcuts" list.

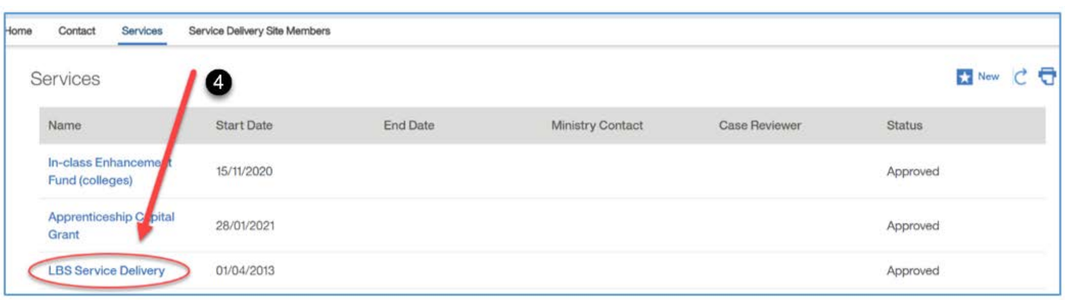
❷ Click on your site **Reference Number**.



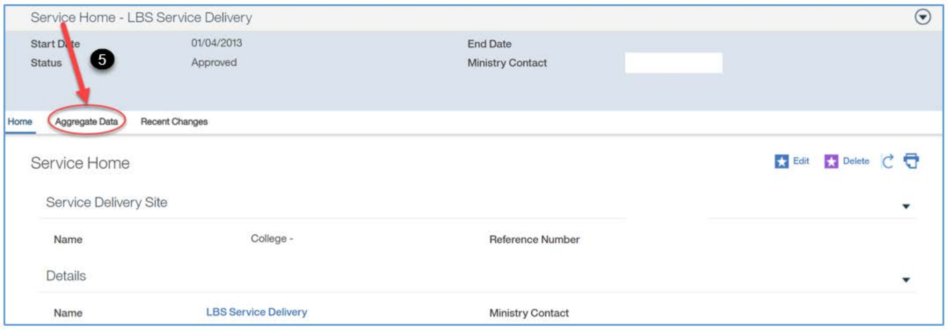
❸ Click on **Services.**



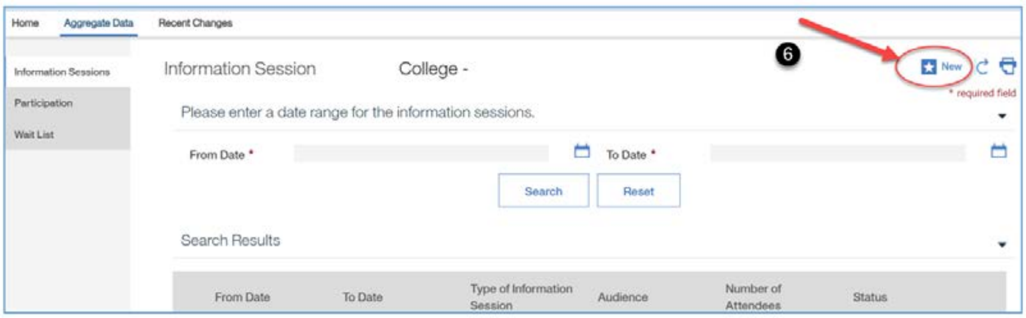
❹ Click on **LBS Service Delivery**.



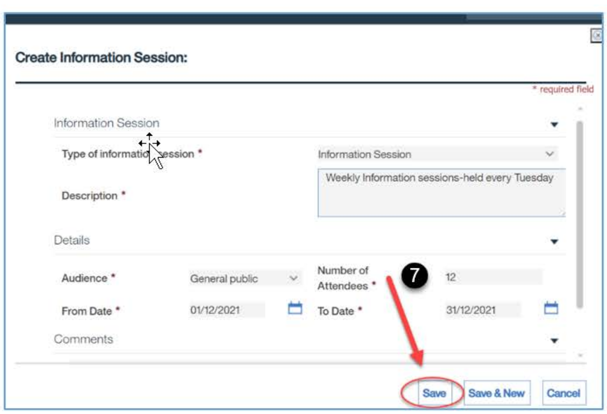
❺ Click on the **Aggregate Data** tab.

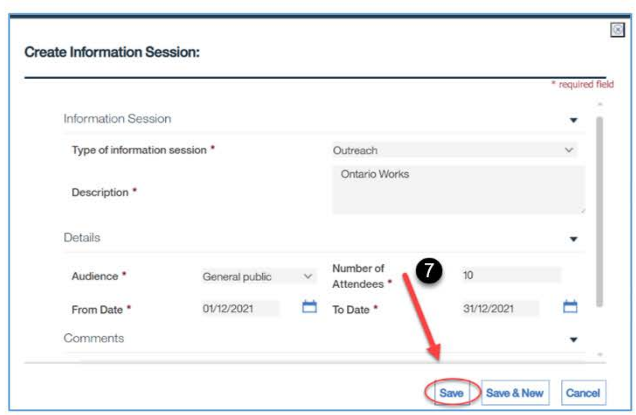


❻ Click the **New** button (If applicable).

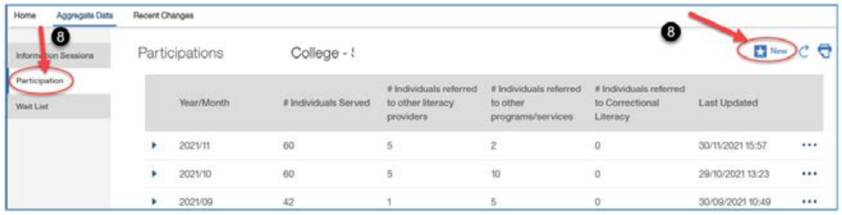


❼ The following pop-screen will appear. Under the Type of Information session, select **Information Session** and/or **Outreach**, provide a description on the activity you did, details on the audience served and enter dates. Click **Save**.

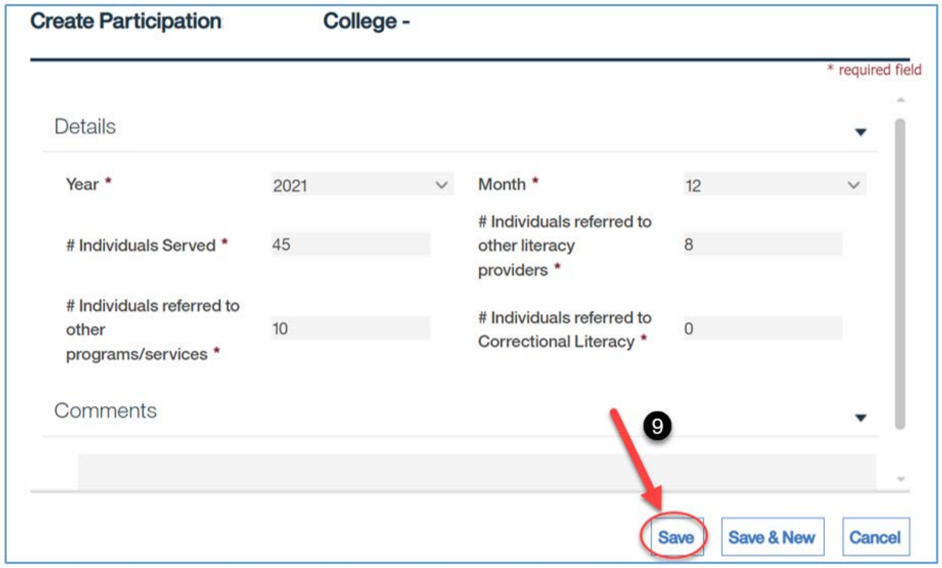




8 Click on **Participation**. Then click **New.**



9 Complete the details and click **Save**.



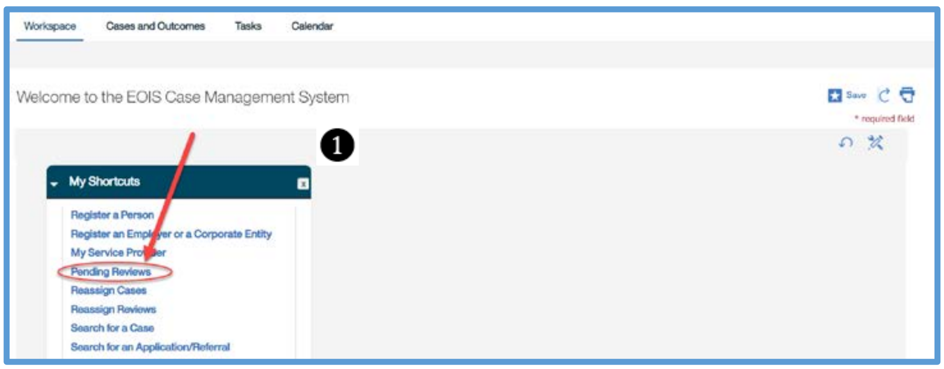
If your site has a waiting list, choose the appropriate tab and record.

Entering 3, 6, and 12-month Follow-ups

It's been 3 months since you closed a learner's plan. It's time for the follow-ups!

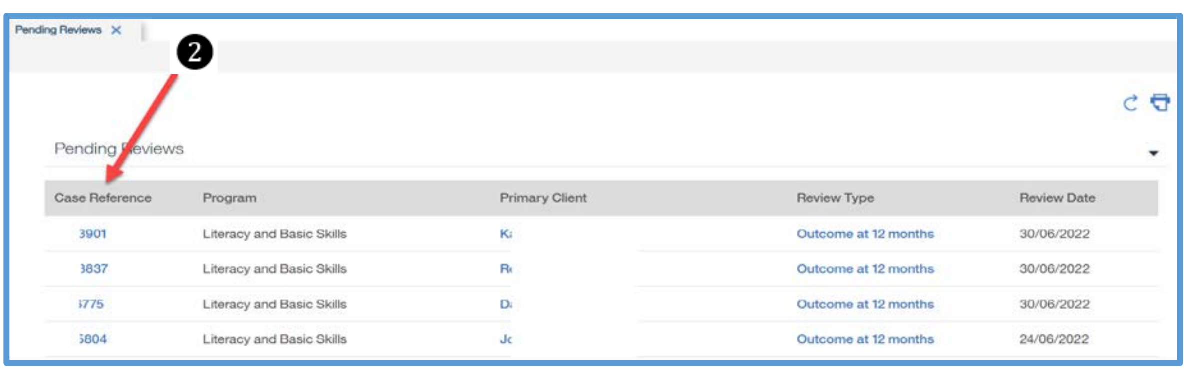
When a service plan is closed, the system will automatically create a 3-month follow-up. Once the 3-month follow-up is completed, then the 6-month follow-up will be generated and subsequently the 12-month follow-up. In CaMS, the follow-ups are also known as "Reviews". To complete your follow-ups, see the steps below.

❶ Click on **Pending Reviews** from your workspace tab.



CaMS will display a list of cases, review types (3-month, 6-months, 12-month) and corresponding review dates.

❷ Click on the **Case Reference** to pull-up the reviews.



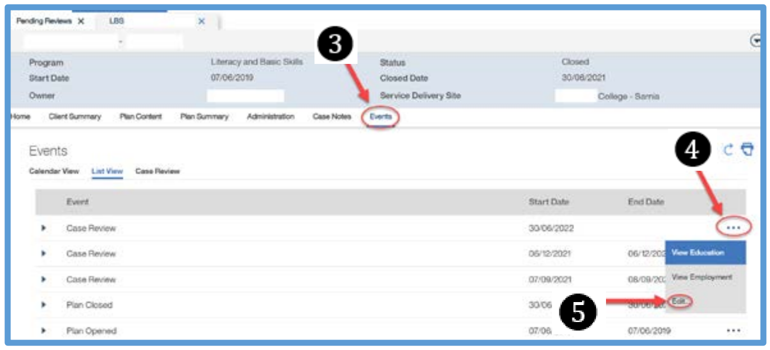
Typically, three attempts are made to contact the learner and outcomes are then recorded. The first attempt made would be considered as the actual start date and the last attempt made would be considered the actual end date recorded for each of the follow-up types.

The following LBS learner service plan will display.

❸ Click on the **Events** tab.

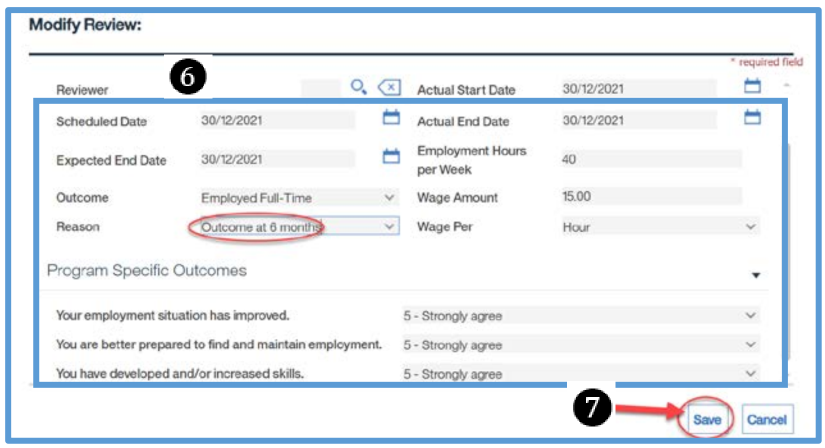
❹ Click on the **Action Button**.

❺ Select **Edit** from the drop-down menu.



❻ You can then enter your review outcomes in the specified field.

❼ Click **Save**.



Your review is now complete. The next applicable review (6 or 12 month) will automatically appear in your **Pending Review** link.

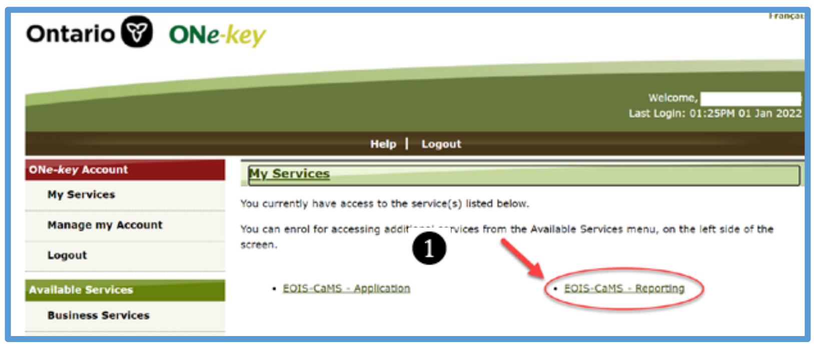
A very useful report for follow-ups is the Service Provider Follow up Cases (Service Plan) # 19-A. This report shows service plan follow-up reviews that are overdue or due within the next 30 days. More information on reports can be found in the next section.

Must-have Tools: EOIS-CaMS Reports

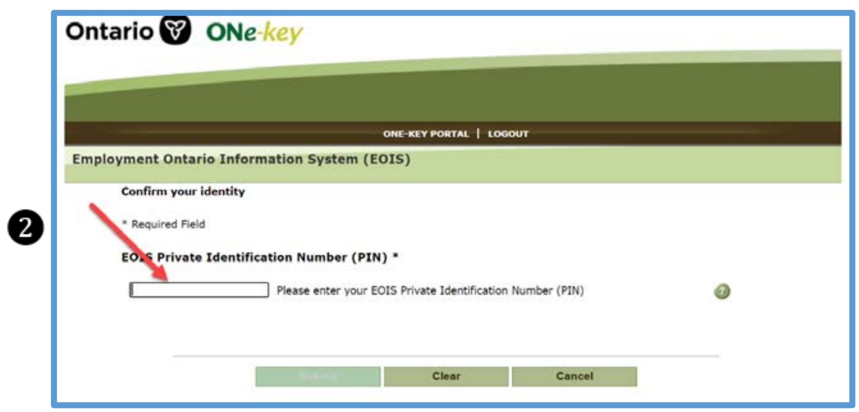
There are many useful reports available to effectively manage your LBS program performance measures.

Logging in

❶ Select **EOIS-CaMS – Reporting**.

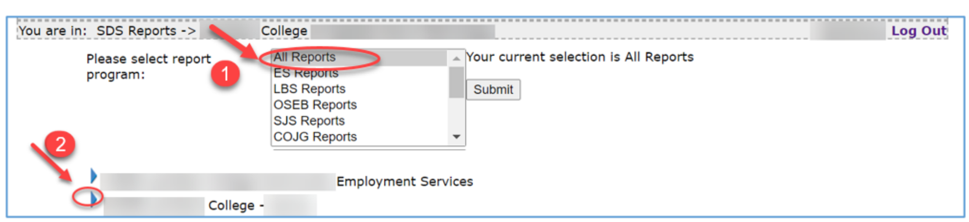


❷ Enter your **PIN** and click **Submit**.



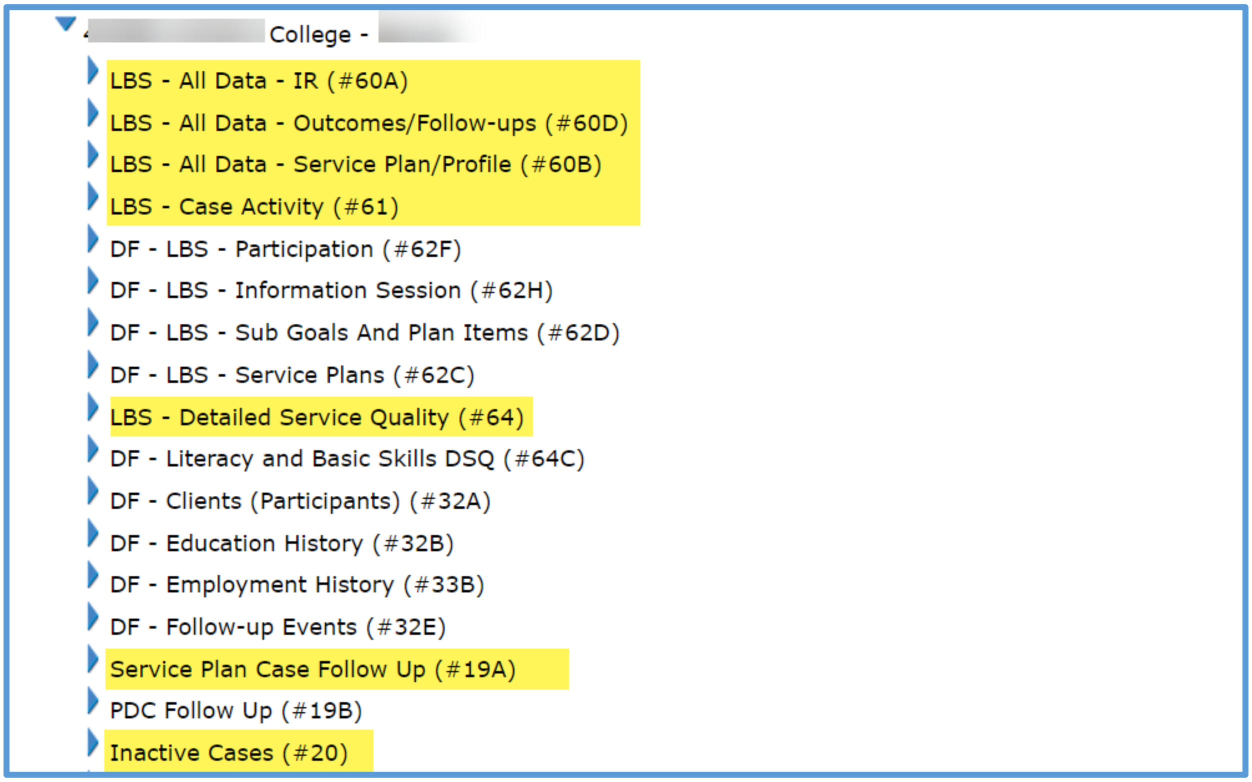
Accessing the Reports

❶ Click on **All Reports** to view a complete list of available reports. You can also choose to filter reports by program.

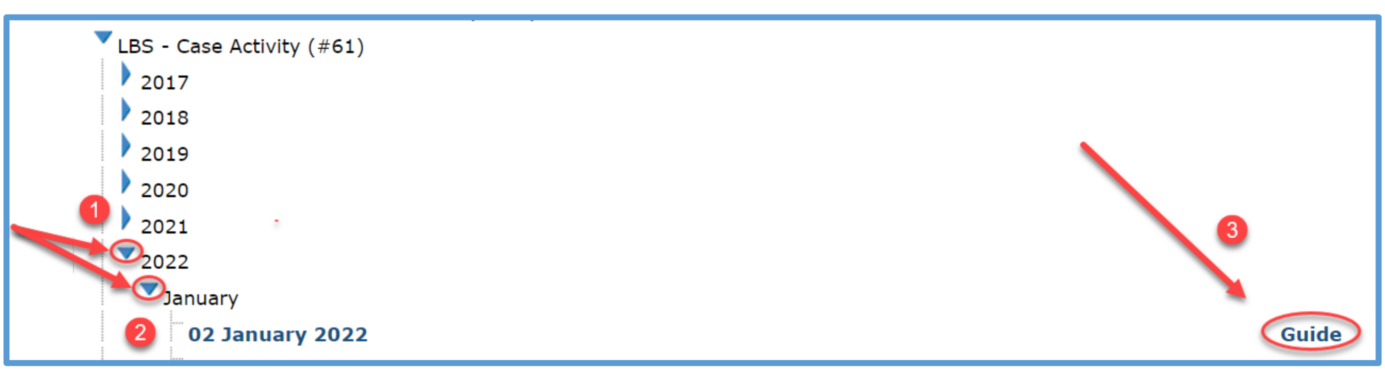


❷ By clicking on the toggle arrow at the bottom, you can expand the reports by site location.

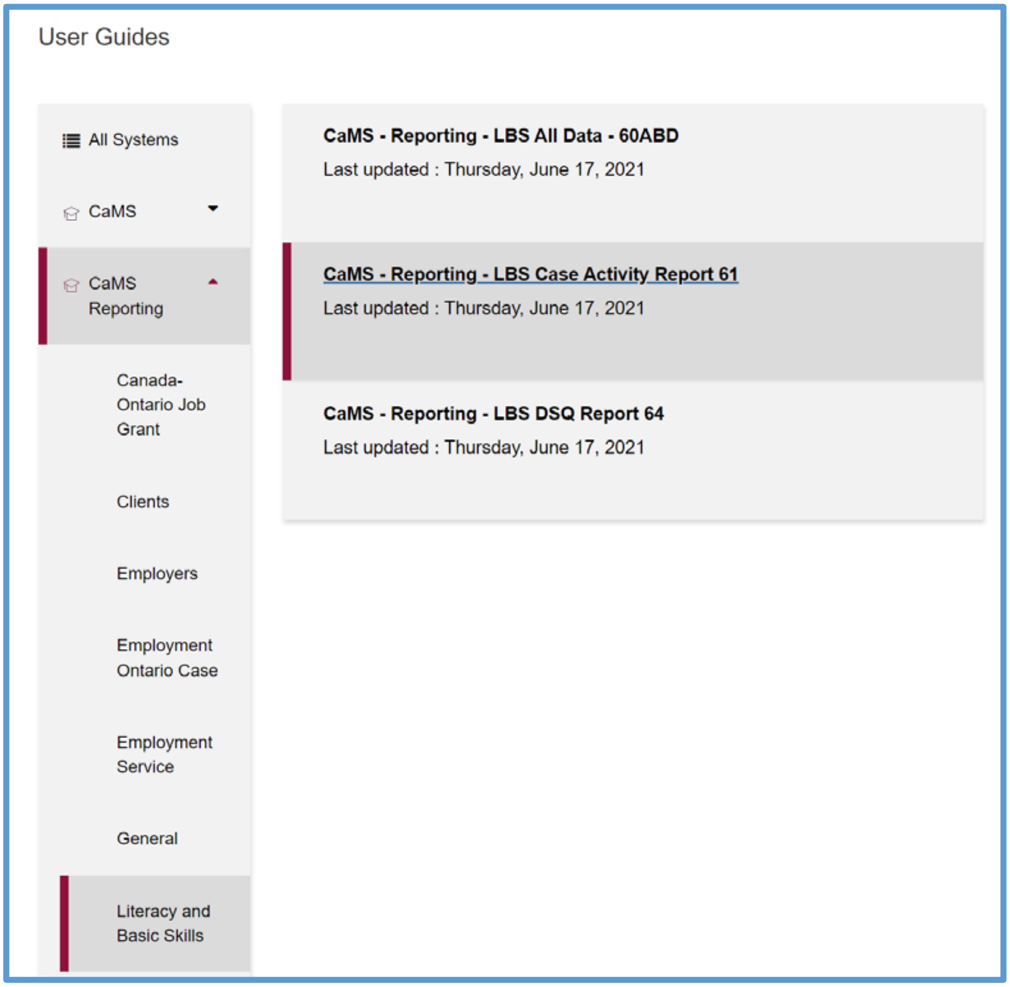
You will see a list of all available reports. From those listed, the highlighted ones are most important to review regularly.



To further understand the data contained in each report and where it comes from in EOIS-CaMS, you will find the corresponding CaMS Reporting "User Guide" next to the report date when you click on the blue triangle to expand the list.



You will also find the CaMS Reporting User Guides under the **User Guide** section of the myEOIS.portal.



NOTE: To view CaMS reports, you must be registered (by your SPRA) to access the "EOIS-CaMS – Reporting" application.

EOIS-CaMS data entry and associated file maintenance is critical to meeting your LBS program's contractual obligations to the Ministry.

Don't hesitate to ask for help when you have questions about CaMS!