EOIS-CaMS User Guide

for New Get SET Staff

2026

Acknowledgements

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Many individuals from Get SET programs across the province contributed to the piloting and review of this guide. Their feedback greatly improved the quality and relevance of this resource.

Prepared by

College Sector Committee for Adult Upgrading

Literacy Network Northeast

Mid North Network for the Coordination and Development of Adult Learning

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EOIS-CaMS User Guide for New Get SET Staff

Introduction and Disclaimer

Welcome to the **Employment Ontario Information System – Case Management System (EOIS-CaMS)** User Guide. This guide is designed to support new users—particularly those working with the **Get SET (Skills, Education and Training)** program—in navigating and using EOIS-CaMS effectively.

While some of the information provided may be relevant to broader EOIS-CaMS usage, the primary focus is on the needs and workflow of Get SET service providers.

What This Guide Includes

- Clear, step-by-step instructions
- Visual aids and screenshots
- Brief explanations of key features and processes

Please note that some procedures may vary depending on the organization's specific practices. Where applicable, the user should follow the site's internal protocols in conjunction with the guidance provided here.

Staying Up to Date

The government of Ontario's Employment Ontario Partners Gateway (EOPG) platform provides the most up-to-date information on EOIS-CaMS changes and system enhancements. Get SET providers are expected to regularly check these sites for updates and official announcements.

Instructions for Using this Guide

This document includes helpful navigation links for easy access to its sections.

- The **Table of Contents** is interactive; clicking a section title will take you directly to that page.
- Within the content, you'll find links that lead to relevant web pages and other locations within the document.
- When you navigate to a new section, there are links on the right-hand side that allow you to return easily to the previous section.

Disclaimer

This guide is intended for informational and training purposes only. The authors are not responsible for any misinterpretation or misuse of the content. EOIS-CaMS and its associated resources are updated periodically. This guide reflects the system version and available resources as of **January 2026**, with a focus on the **Get SET (Skills, Education and Training)** progra

Contents

Employment Ontario Partners Gateway (EOPG) Website

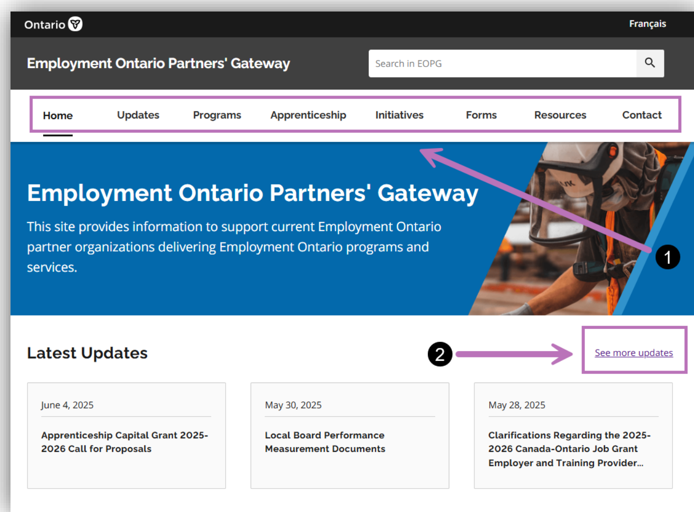
The **Ministry of Labour, Immigration, Training and Skills Development (MLITSD)** provides a central online resource for service providers through the [Employment Ontario Partners Gateway]() **(EOPG)**.

The EOPG website offers a comprehensive collection of tools, documents, and updates designed to support the effective delivery of **Employment Ontario (EO)** programs, including the [Get SET]() program.

Home Page – Key Features

1 Toolbar – Located at the top for easy navigation across sections.

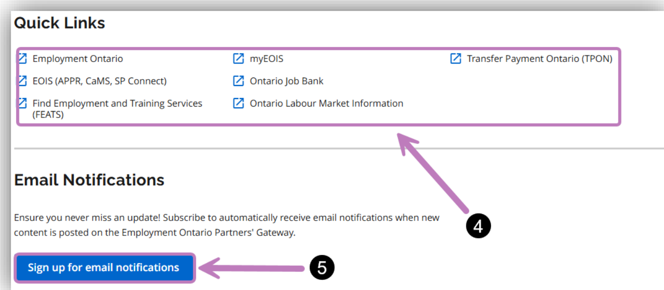
2 Latest Updates – Displays recent announcements and program changes.



3 Quick Links to Program Information – Direct access to specific EO programs.

4 Links to Other Websites and Information Systems – Commonly used by EO service providers.

5 Email Notification Sign-Up – Allows you to receive alerts when updates are posted.



Subscribing to alerts is highly recommended to stay informed about changes and new resources

Get SET Program Page

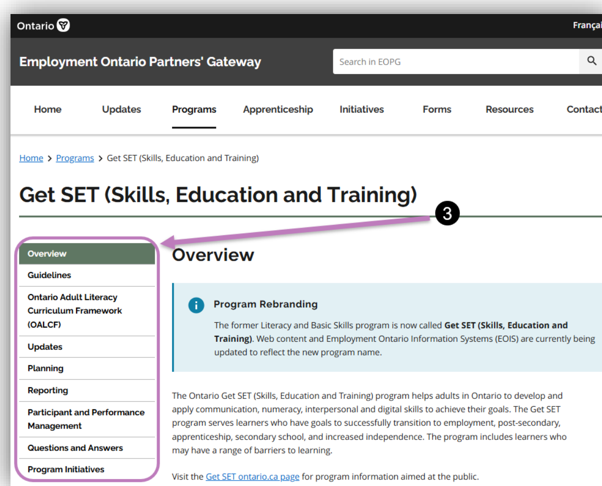
Step 1: At the top of the page, click **Programs**.

Step 2: From the list, select Get SET.

Step 3: Review the page for all **Get SET-specific** updates, resources, and information.

This section provides access to Ministry

- memos
- program guidelines
- forms
- additional resources



It is important to review these pages regularly and become familiar with the content to ensure compliance and effective program delivery.

Employment Ontario Information System EOIS-CaMS

Get SET service providers are required by the Ministry to use the **Employment Ontario Information System – Case Management System (EOIS-CaMS)** to record and manage client and learner information. EOIS-CaMS is a secure, web-based application hosted on the **Ontario Public Service / Broader Public Sector (OPS BPS) Secure Portal**. It is maintained by the Government of Ontario to support the delivery and administration of Get SET and other Employment Ontario (EO) programs.

EOIS-CaMS System Overview

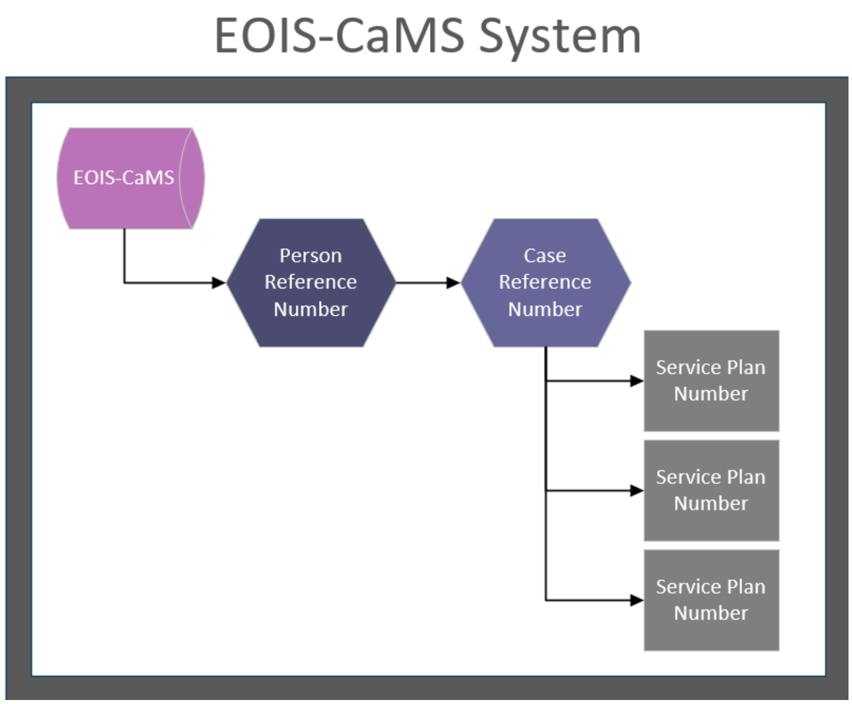
The EOIS-CaMS system organizes participant information using a structured hierarchy of reference numbers. Below is a snapshot of how the system tracks and manages data.

Person Reference Number – Client Profile

- Assigned when a participant's personal information is first entered into EOIS-CaMS.
- Includes key details such as:
  - Contact information
  - Status in Canada
  - Educational background
  - Employment history

Case Reference Number – Employment Ontario Case

- Generated after the Person Reference Number is created.
- Used to manage the participant's overall engagement with EO programs.
- Includes:
  - Registration details
  - Service plans
  - Recent updates



Service Plan Number

- Assigned when a participant begins a specific service, such as Get SET.
- Each service plan contains detailed information about
  - participant goals
  - status of the participant's service plan, sub-goals and plan items
  - start/end dates, outcomes, exit and follow-up data.

EOIS-CaMS Access

To begin using EOIS-CaMS, registration must first be completed through the Get SET organization's **designated Service Provider Registration Authority (SPRA).** The SPRA is an employee of your organization who is responsible for managing user access and will guide service provider members (users) through the registration process. (Note that the Ministry recommends using the Microsoft Edge browser to access all EOIS services.)

Registration Process

To gain access to EOIS-CaMS, follow these steps:

1. **Complete the EOIS Registration Form**
   - Obtain the required form from the SPRA for your Get SET program.
   - Fill out all sections accurately.
2. **Attend a Face-to-Face Meeting**
   - Schedule a meeting with the SPRA to verify identity and finalize registration.
3. **Provide Valid Identification**
   - Bring two original pieces of identification to the meeting; a list of acceptable identification will be provided by the SPRA.

Social Insurance Numbers (SIN) and Ontario Health Cards are not accepted as valid forms of ID for this purpose.

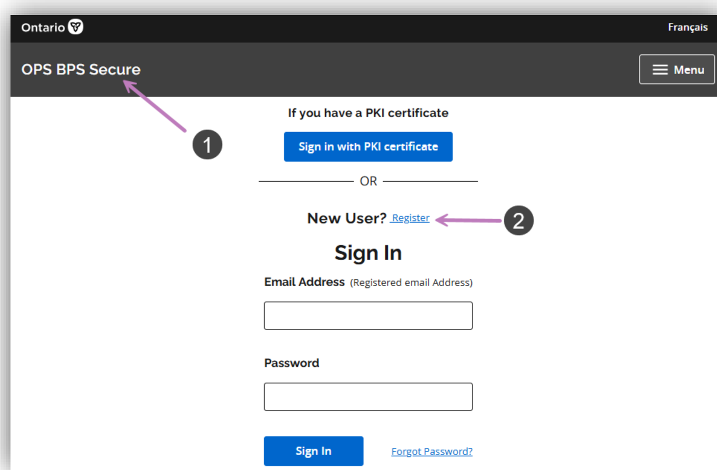
OPS BPS Secure Portal Registration

Once the SPRA has initiated registration, an account must be created on the OPS BPS Secure Portal using the work email address. This email must match the one provided on the registration form.

Step 1: Go to the [OPS BPS Secure Portal]

Bookmark the portal link in the browser for quick access.

Step 2: Click **Register**



Step 3: Complete the registration form with the following details:

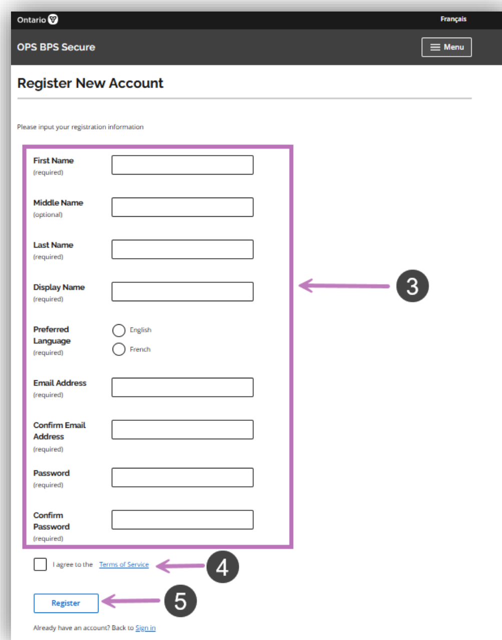
- **Full name**
- **Work email address**
- **Secure password**

Password Requirements:

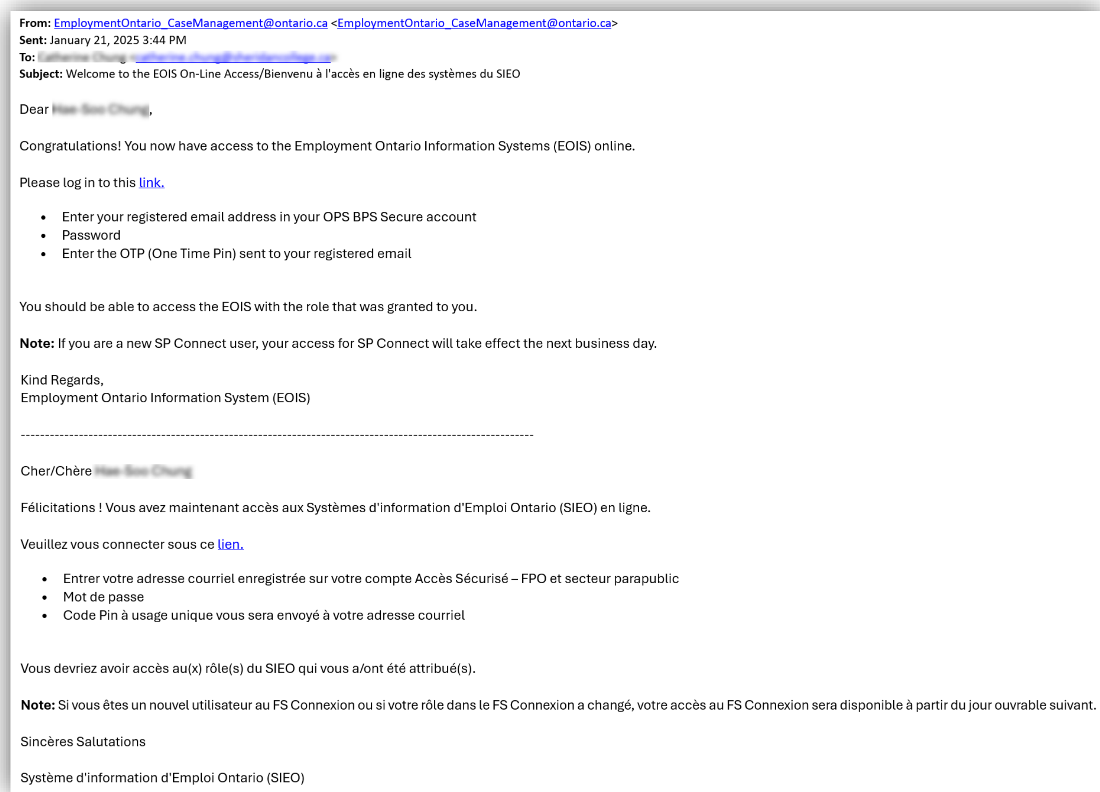
- Must be **12–17 characters** long
- Must include:
    - At least one **uppercase letter**
    - At least one **lowercase letter**
    - At least one **number**
    - At least one **special character** (e.g., ! @ # $ % ^ & *)

Step 4: Agree to the **Terms of Service** by checking the box

Step 5: Click **Register**



A **confirmation email** will be sent to the email address provided upon successful registration.



From: EmploymentOntario_CaseManagement@ontario.ca <EmploymentOntario_CaseManagement@ontario.ca>
Sent: January 21, 2025 3:44 PM
To: [redacted]
Subject: Welcome to the EOIS On-Line Access/Bienvenu à l'accès en ligne des systèmes du SIEO

Dear [redacted],

Congratulations! You now have access to the Employment Ontario Information Systems (EOIS) online.

Please log in to this link.

- Enter your registered email address in your OPS BPS Secure account
- Password
- Enter the OTP (One Time Pin) sent to your registered email

You should be able to access the EOIS with the role that was granted to you.

Note: If you are a new SP Connect user, your access for SP Connect will take effect the next business day.

Kind Regards,
Employment Ontario Information System (EOIS)

Cher/Chère [redacted]

Félicitations ! Vous avez maintenant accès aux Systèmes d'information d'Emploi Ontario (SIEO) en ligne.

Veuillez vous connecter sous ce lien.

- Entrer votre adresse courriel enregistrée sur votre compte Accès Sécurisé – FPO et secteur parapublic
- Mot de passe
- Code Pin à usage unique vous sera envoyé à votre adresse courriel

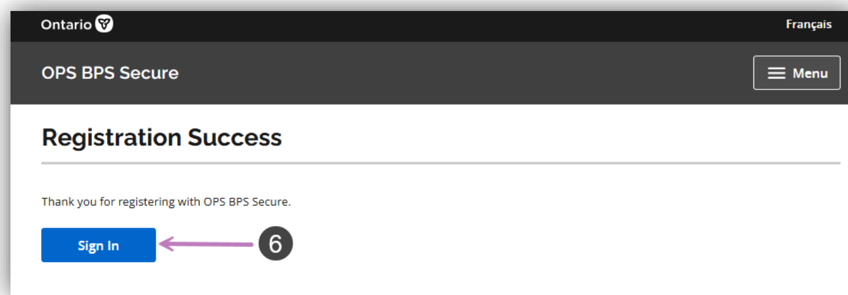
Vous devriez avoir accès au(x) rôle(s) du SIEO qui vous a/ont été attribué(s).

Note: Si vous êtes un nouvel utilisateur au FS Connexion ou si votre rôle dans le FS Connexion a changé, votre accès au FS Connexion sera disponible à partir du jour ouvrable suivant.

Sincères Salutations

Système d'information d'Emploi Ontario (SIEO)

Step 6: Once registered, return to the portal homepage and click **Sign In** to log in



OPS BPS Secure Navigation

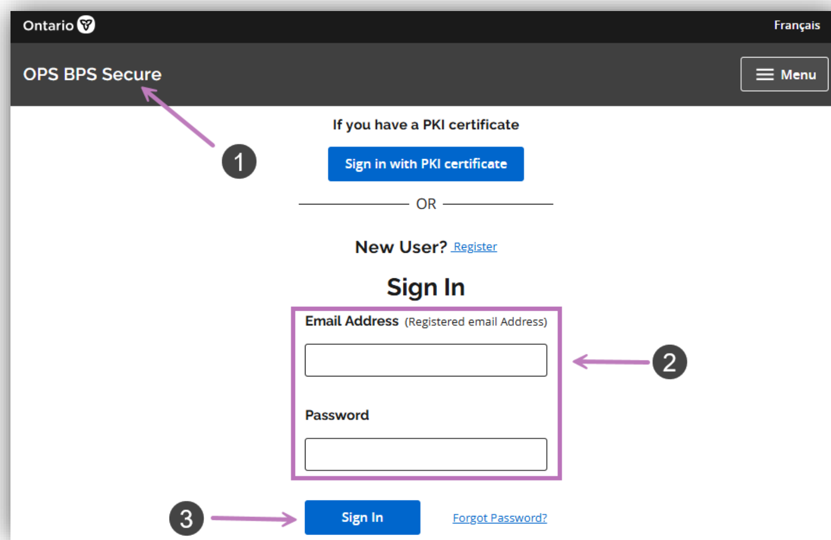
This section provides a step-by-step guide to help login and access the EOIS-CaMS tools through the OPS BPS Secure Portal. It also outlines the multi-factor authentication process required to ensure secure access to the system.

Logging Into OPS BPS Secure

Step 1: Go to the OPS BPS Secure

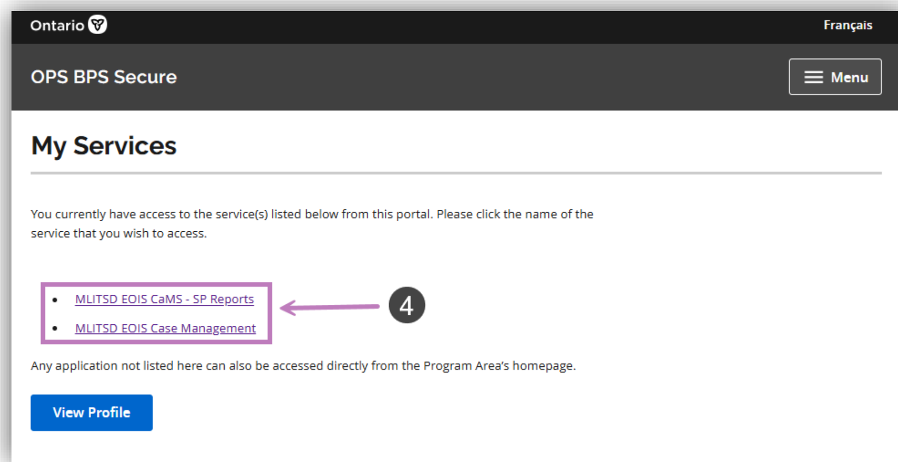
Step 2: Enter **your work email address** and **password**

Step 3: Click **Sign In**



Step 4: Select the appropriate **EOIS-CaMS** service:

- **MLITSD EOIS-CaMS – SP Reports**: Access system-generated reports
- **MLITSD EOIS Case Management**: Access the Case Management system



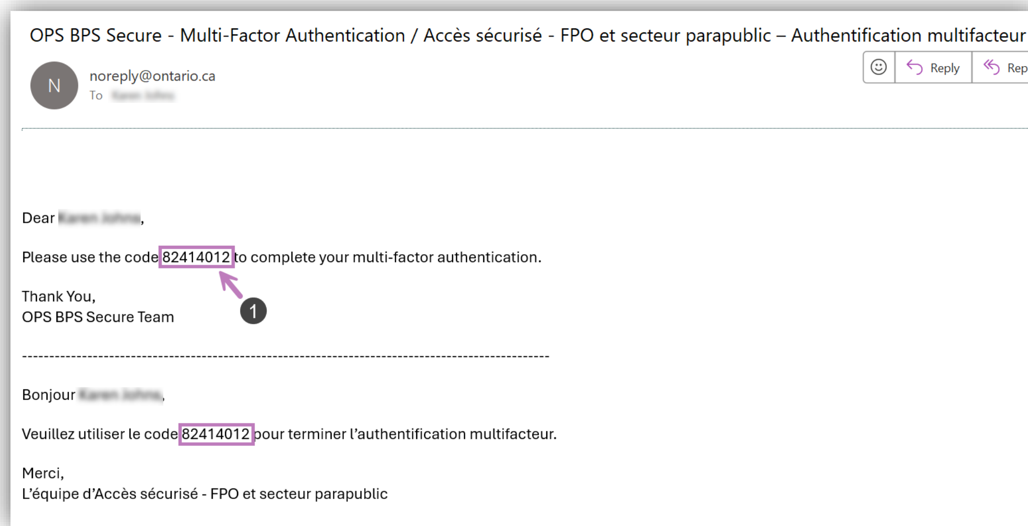
*Click the **View Profile** button if you need to update your profile information.*

EOIS-CaMS SP Reports access is restricted and will not be available to all staff.

Multi-Factor Authentication (MFA)

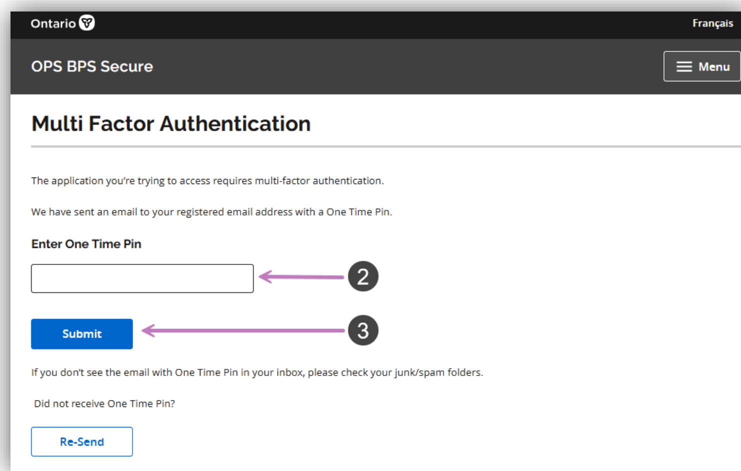
To ensure secure access, EOIS uses **Multi-Factor Authentication (MFA)**. A **One-Time PIN (OTP)** will be sent to your work email each time you log in.

Step 1: Open your work email and locate the message from noreply@ontario.ca containing the **One-Time PIN** and copy the number



Step 2: Paste (or type) the **PIN** into the designated field on the portal

Step 2: Click **Submit**



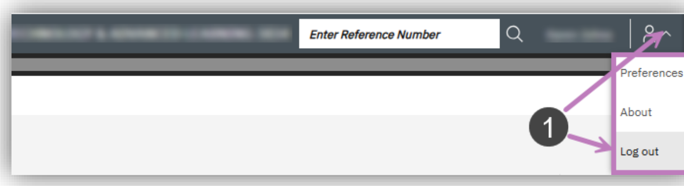
*If you did not receive the email, first check your Junk/Spam folder. Click **Re-Send** to request a new PIN.*

Navigating to the Pages

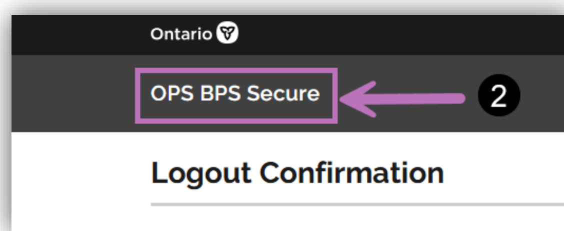
This section explains how to switch between EOIS services within the OPS BPS Secure Portal without having to repeat the Multi-Factor Authentication (MFA) process.

Step 1: Click **Logout** in the top-right corner of the current EOIS tool page.

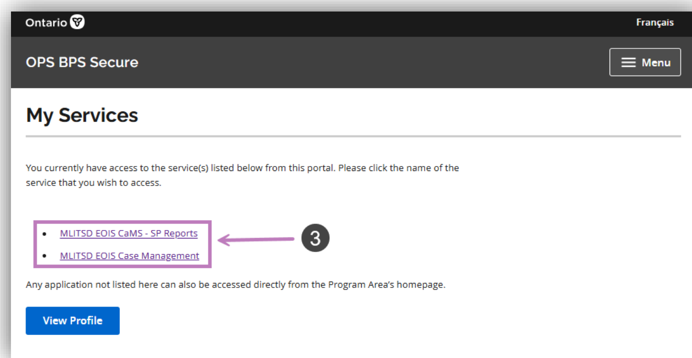
*You will be redirected to the **OPS BPS Secure Portal** homepage.*



Step 2: Click on the **OPS BPS Secure** label to return to the main portal dashboard.



Step 2: Select a different **EOIS** service **link** to access another part of the system.



As long as your session remains active, you won't need to re-enter the One-Time PIN.

EOIS-CaMS User Overview

EOIS-CaMS (Employment Ontario Information System – Case Management System) is the Ministry's secure, web-based platform used by service providers to manage client and learner information. This system supports the delivery of Employment Ontario programs by organizing participant data, tracking service plans, and generating reports. Understanding how to navigate EOIS-CaMS effectively is essential for accurate data entry, efficient case management, and compliance with Ministry requirements.

Navigating Tips

There are many helpful hints for navigating the features and pages within EOIS-CaMS.

General Navigation Guidelines

- **Avoid using your browser's Back and Forward buttons.** This can disrupt your session or cause data loss.
- **Single-click only** on links and action buttons to prevent duplicate entries or errors.
- Use the **Tab key** to move forward through form fields.
- Use **Shift + Tab** to move backward through form fields.

Troubleshooting Browser Issues

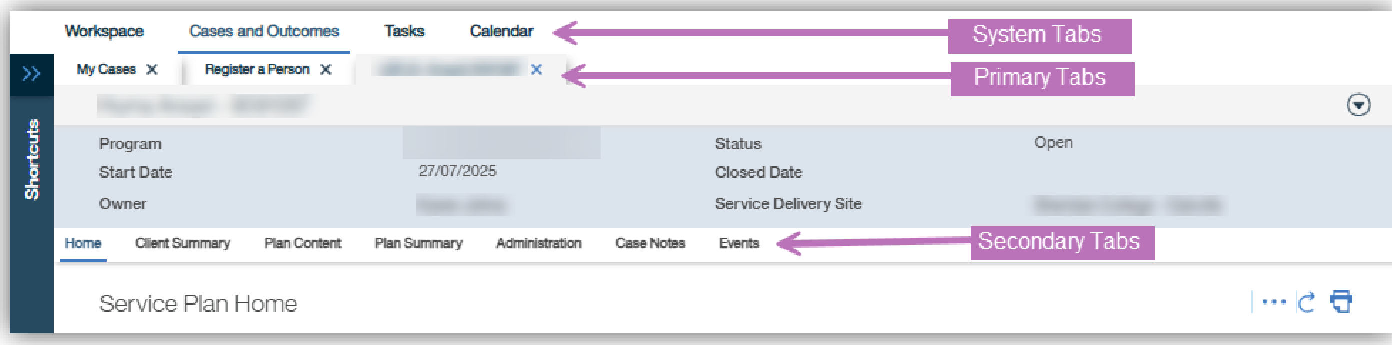
If you experience issues with page loading or system responsiveness:

- Press **Ctrl + Shift + Delete** to clear your browser's cache and browsing history.
- Add gov.on.ca to the **Compatibility View Settings** in Microsoft Edge to improve system performance.

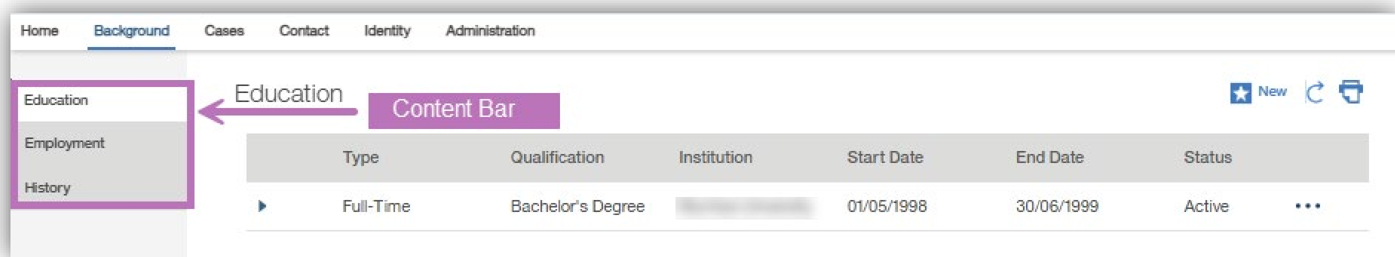
System Components

Understanding the layout of EOIS-CaMS will help you navigate more efficiently.

- **System Tabs**: Located at the very top of each page, these function like a toolbar and provide access to major system areas.
- **Primary Tabs**: Found directly below the system tabs, these represent main sections of the system, similar to web pages.
- **Secondary Tabs**: Located within individual cases or participant profiles. Some areas may contain multiple levels of secondary tabs for detailed navigation.



- **Content Bar**: A left-hand sidebar that acts as a set of subfolders related to the selected tab.



Home Page Short Cuts

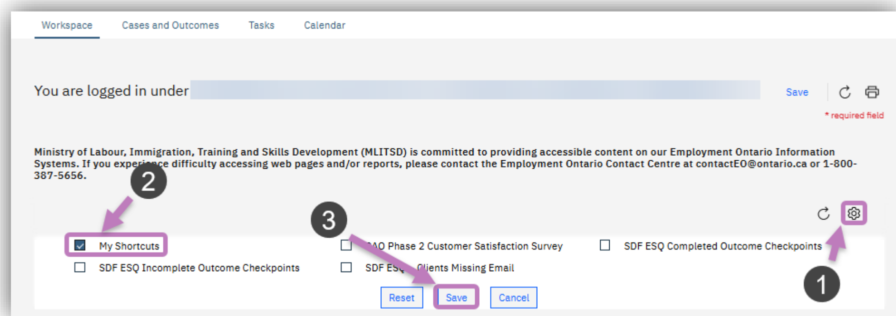
When a user logs into the EOIS-CaMS home page, they will need to set up 'My Shortcuts'.

Setting up My Shortcuts

Step 1: Click the **Settings Cog**

Step 2: Click the check box for **My Shortcuts**

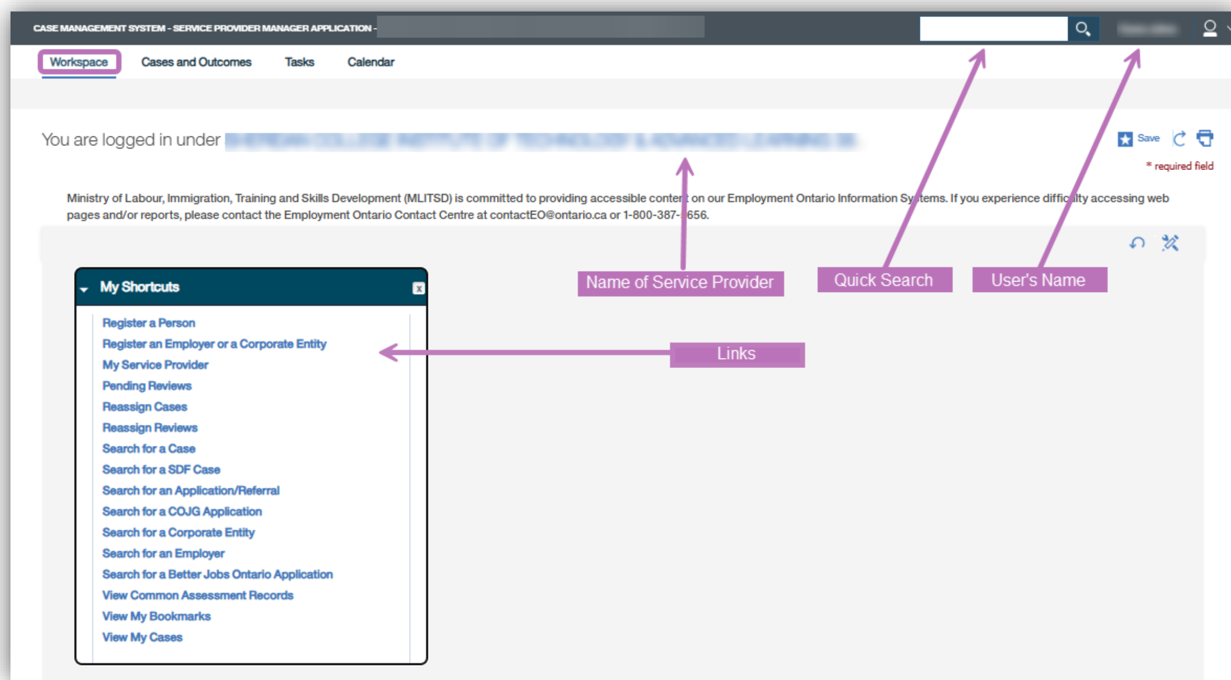
Step 3: Click **Save**



User's Home Page (Workspace Page)

This is the default landing page when a user logs into EOIS-CaMS. It provides personalized access to system tools and functions based on the user's assigned role.

The Quick Search is useful to find participant's accounts if the Service Plan or Person Reference Number is known.



Searching Functions Overview

EOIS-CaMS includes several search functions to help users locate existing records efficiently. **Performing a search before registering a new client is essential to avoid creating duplicate files.**

How EOIS-CaMS Performs Searches

EOIS-CaMS uses flexible search logic to help users locate existing client records efficiently:

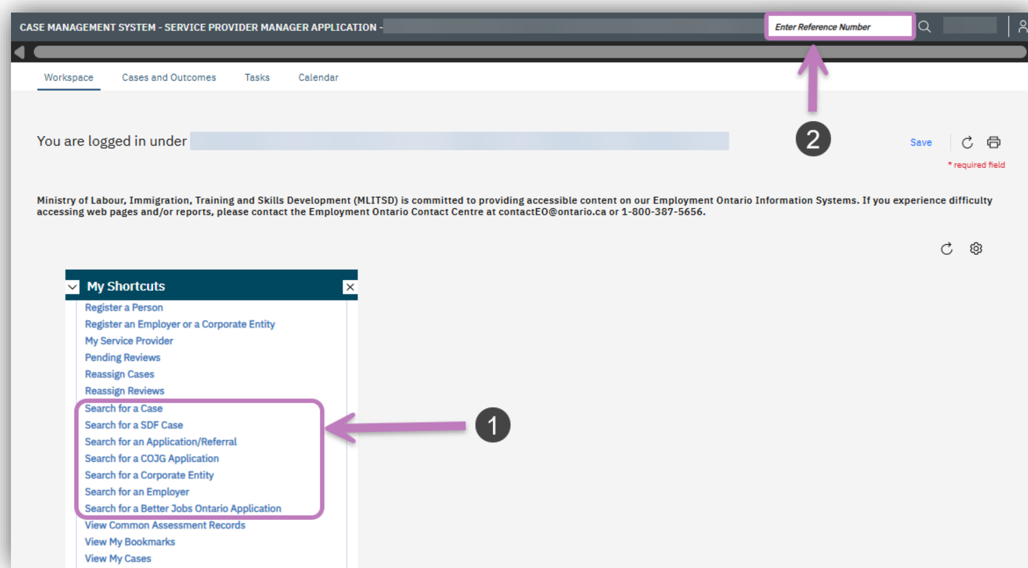
- **Partial Name Matching:** The **First Name** and **Last Name** fields support partial matches. For example, entering “Soren” in the Last Name field will return results like “Sorenson” and “Sorensen.”
- **Nickname Matching:** The checkbox below the **First Name** field enables nickname matching. If you enter “Bill” and check the box, the system will search for related names such as “Billy,” “Will,” and “William.”
- **Character and Case Insensitivity:** The system ignores special characters (e.g., accents) and is not case-sensitive when searching by first or last name.

Searching from the Workspace Page

There are two ways to do a search from the Workspace Page.

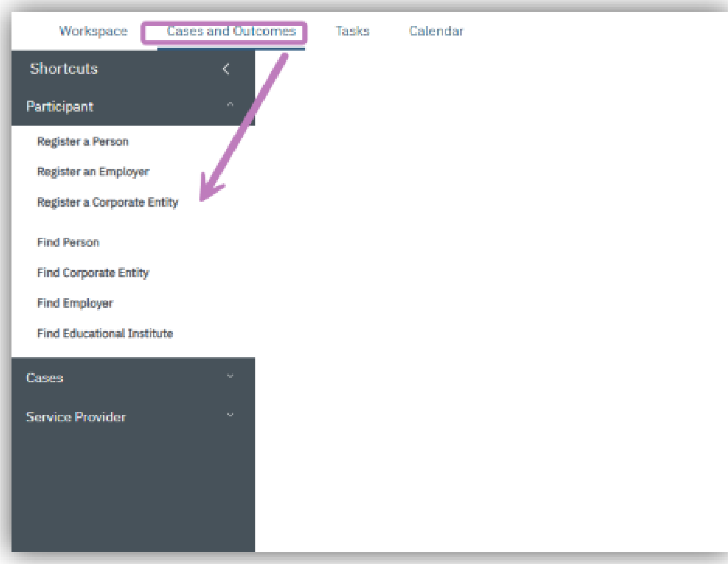
1 My Shortcuts panel includes multiple search links tailored to different Employment Ontario programs. Most users will frequently use the **Case Search** function.

2 Quick Search is useful to find a participant’s account if the **Service Plan** or **Person Reference Number** is known.



Searching for a Participant from the Case and Outcome Page

Participant search functions can be accessed directly from the **Case and Outcome** page. To begin, open the **Shortcuts Panel**, which provides quick access to search tools and allows you to locate participant records efficiently.

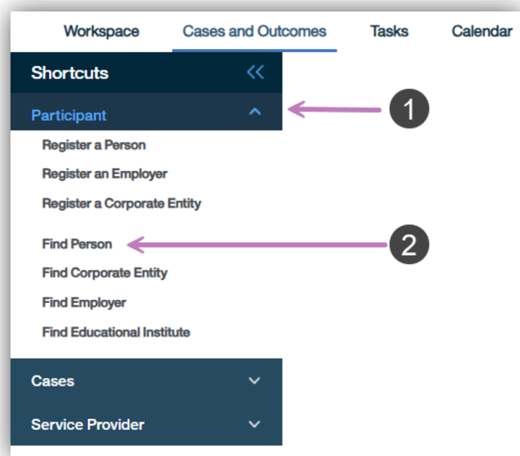


Performing a Search

A Person Search

Step 1: Click the **Participant** heading

Step 2: Select **Find Person**



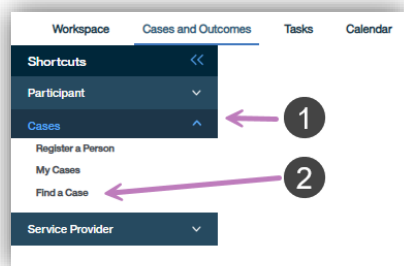
This search is useful when the Case Reference Number is known.

Performing a Case Search

This allows you to search by Case Reference Number, if it is known.

Step 1: Click the **Cases** heading

Step 2: Select **Find a Case**



The Participant Search and Results

Multiple search parameters are available, including Social Insurance Number (SIN), EOIS case reference number, last name, first name, date of birth (DOB), and/or gender.

To prevent creating a duplicate account for a participant, there are four suggested searches to perform to find an existing participant.

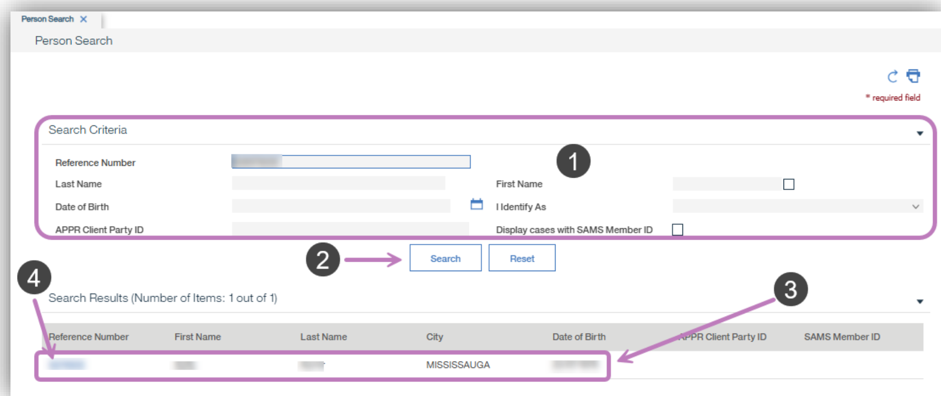
1. **First and Last Name**
   Use this search in cases where there may be an error in the date of birth, or when a SIN is missing, incorrect, or temporary in EOIS-CaMS.
2. **First Name and Date of Birth**
   Use this search if the last name may be incorrect due to spelling errors, variations, or a name change, and when the SIN is missing, incorrect, or temporary in EOIS-CaMS.
3. **Last Name and Date of Birth**
   Use this search if there may be an error in the first name due to spelling, use of a preferred name, or missing information in EOIS-CaMS, and when the SIN is missing, incorrect, or temporary.
4. **Social Insurance Number (SIN) Only**
   Use this search when the SIN exists in EOIS-CaMS but there may be errors in the participant’s first name, last name, or date of birth.

Step 1: Enter the search criteria (using the four different search criteria)

Step 2: Click **Search**

Step 3: Review the **Search Results**

Step 4: Click the corresponding **Reference Number** link to open the **Person Home Page**

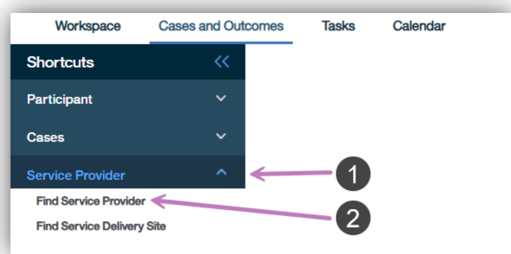


The system will display an error message if insufficient search criteria are entered.

Performing a Service Provider Search

The **Service Provider Search** allows users to locate organizations contracted by the Ministry to deliver Employment Ontario (EO) programs.

Step 1: Click the **Service Provider** heading
Step 2: Select **Find Service Provider**



Navigating the Search Panel

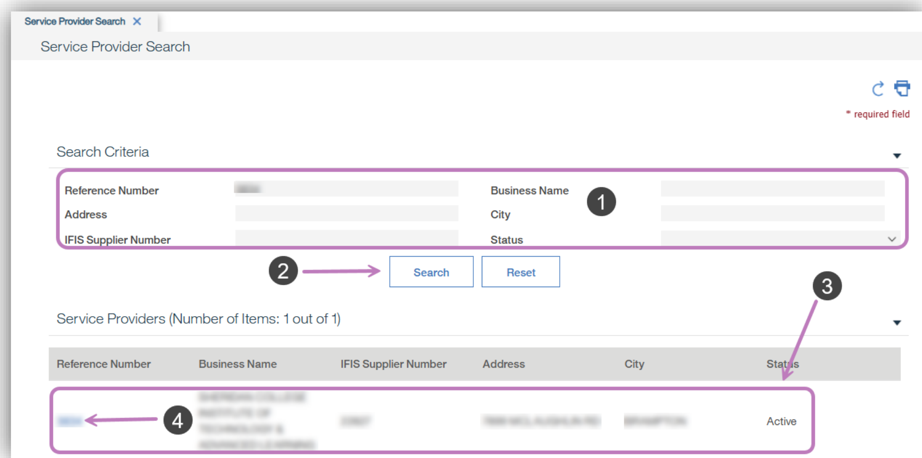
The **Search Panel** in EOIS-CaMS is designed to help users locate records quickly and efficiently. Once you've selected a search type (e.g., Person, Case, or Service Provider), follow these steps:

Step 1: Enter the relevant search criteria (e.g., name, reference number, date of birth)

Step 2: Click **Search** to initiate the query

Step 3: Review the **Search Results** displayed

Step 4: Click the corresponding **Reference Number** link to open the associated home page (e.g., Person or Service Provider)



Participant Registration

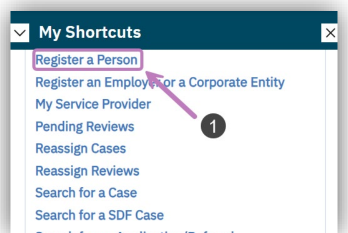
The client's **Participant Registration Form (PRF)** is used to enter the required data into EOIS-CaMS and create a participant account. This form must be completed by both the **participant** and the **service provider**. The PRF document is available on the [EOPG](#) **website** under the [Forms](#) section.

Participant Search

The first step in registration is to search EOIS-CaMS to determine whether an Employment Ontario (EO) participant case already exists. A thorough search is critical to prevent the creation of duplicate accounts. Please note that some applicants may have existing accounts with no SIN or with a temporary SIN number (900 series).

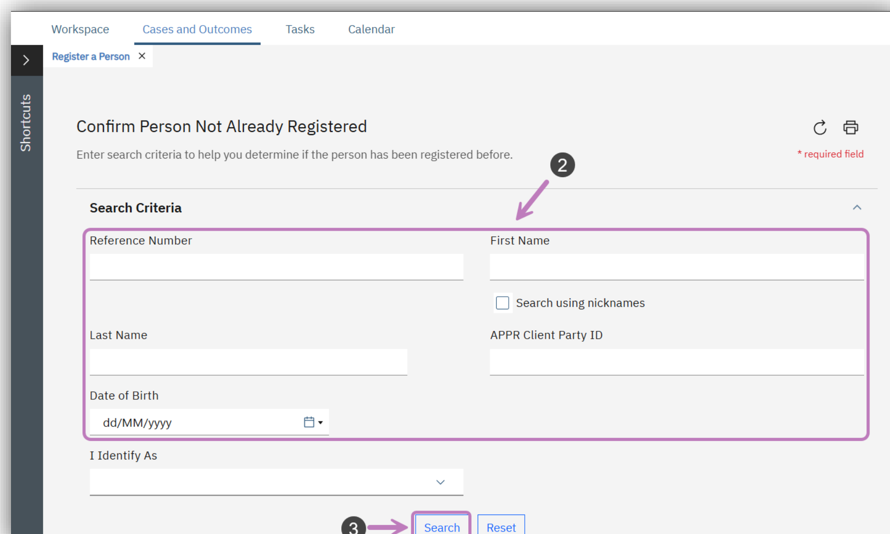
.

Step 1: Click **Register a Person**



Step 2: Enter **participant's Information** (*Check the four different criteria in [The Participant Search and Results](#)*)

Step 3: Click **Search**



Perform searches by removing letters from the first name and the last name, or removing the birthdate, to expand the search to ensure the applicant is not already in the system before creating a new account. If a duplicate case is found, consult your program coordinator or manager for next steps.

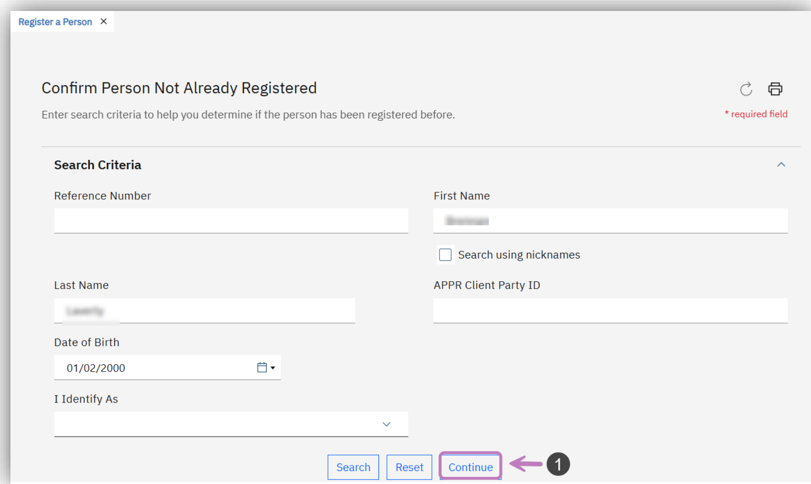
Search Results

- If the **search value is zero**, proceed to [Creating a New Participant]
- If an **existing EO case is found**, proceed to [Updating a Returning Participant]

Creating a New Participant Account

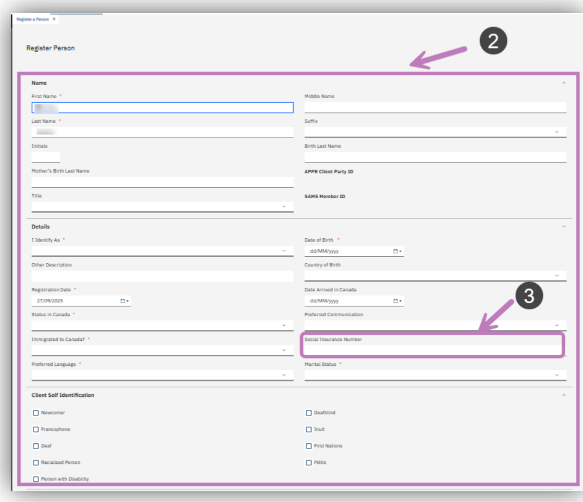
Enter Participant Information

Step 1: Click **Continue**



Step 2: Enter all information in the **mandatory fields** (marked with an asterisk *) on the **Register Person** page

Step 3: Although the **Social Insurance Number** does not have an asterisk, it is considered a **mandatory field**



*Information can also be entered in the **non-mandatory fields.***

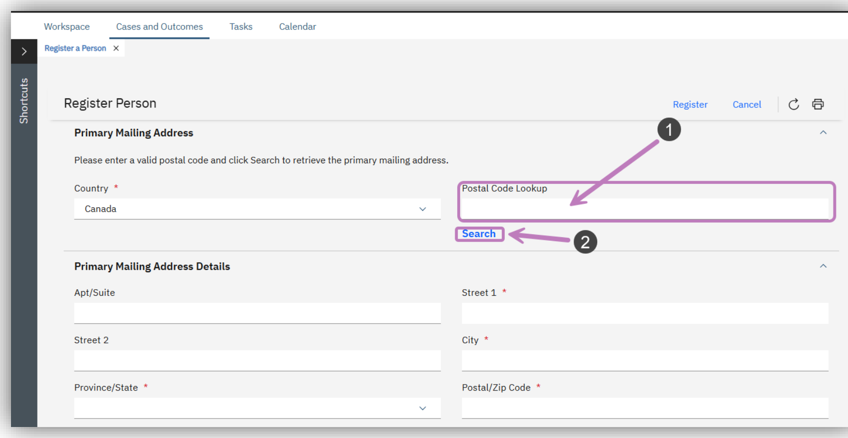
Entering an Address

Addresses in EOIS-CaMS are entered using a centralized **Postal Code Look Up** application. When a postal code is entered and searched, the Postal Code Look-up page displays a list of all addresses within that postal code area.

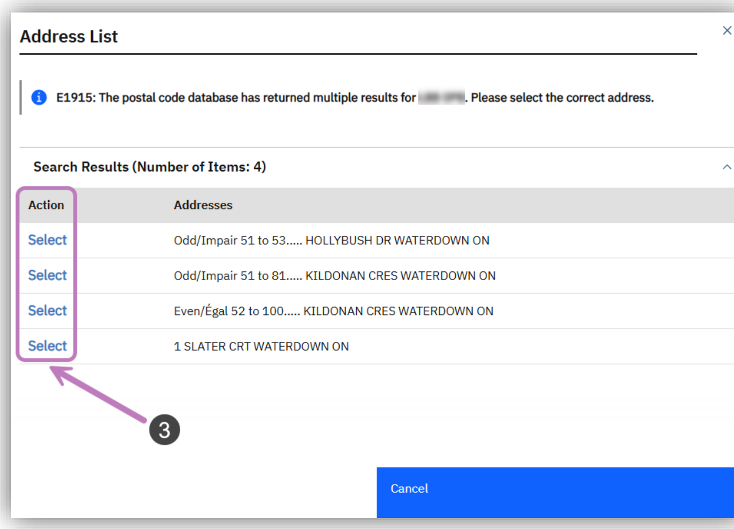
If the Postal Code is Correct

Step 1: Enter the **Postal Code**

Step 2: Click **Search**

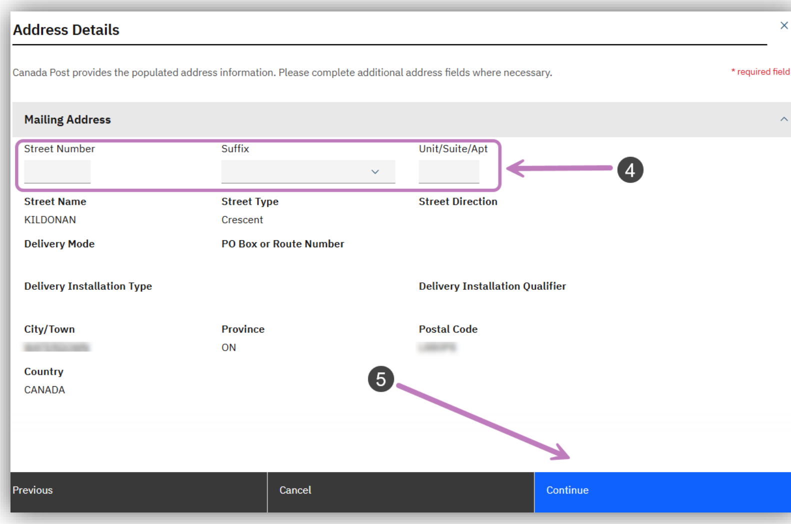


Step 3: Click the **Select** link if the correct address is listed or click **Cancel** if it is not and refer to the next section - [If the Postal Code is Incorrect](#).



Step 4: Enter the **address information**

Step 5: Click **Continue**



If the Postal Code is Incorrect

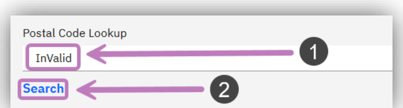
If the postal code does not exist or is incorrect, you can:

- verify the postal code on the [Canada Post](#) website
- contact the client to confirm the correct address information

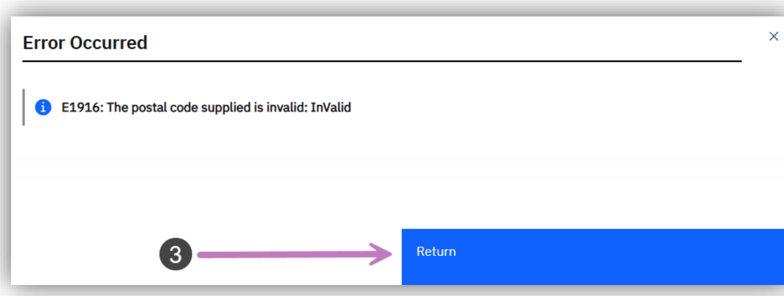
If the address exists but is not found in the system:

Step 1: Enter **InValid**

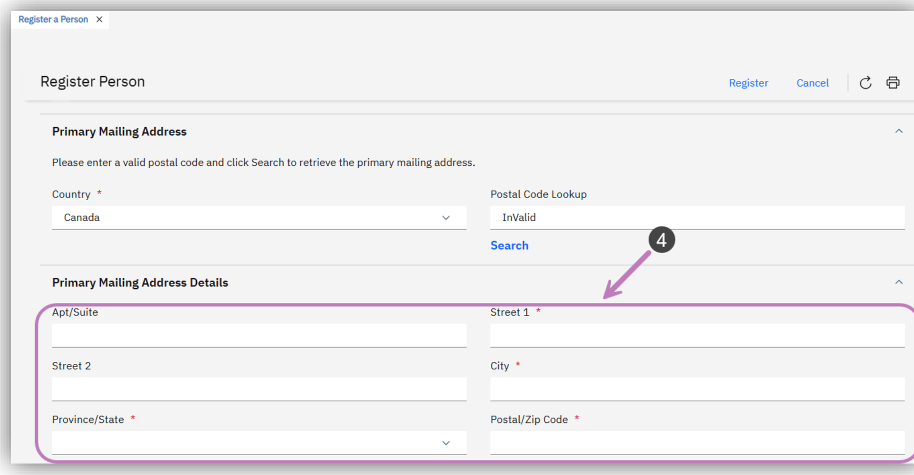
Step 2: Click **Search**



Step 3: Click **Return**



Step 4: Enter the **address information manually**



Return to [Modifying an address]

Participant Contact Information

Although contact information fields are not mandatory, they are helpful when identifying a participant.

Step 1: Enter the participant's **contact information**

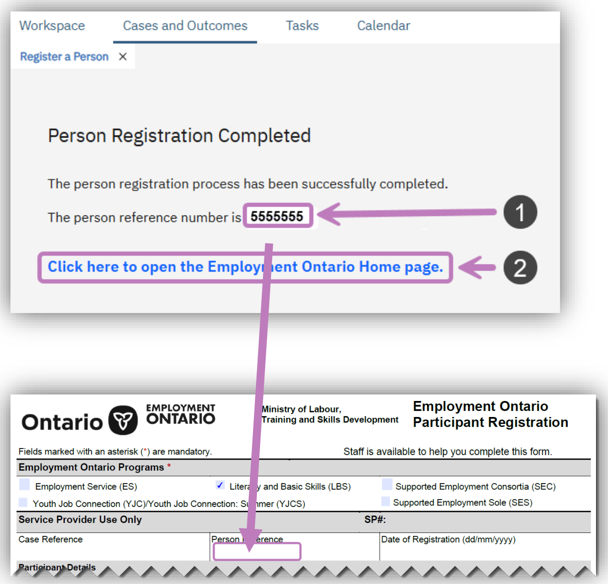
Step 2: Click **Register** to create the account

Recording the Person Reference Number

Once the participant account has been created, it is important to record the person reference number on the Participant Registration Form (PRF).

Step 1: Enter the **Person Reference Number** on the PRF

Step 2: Click the **Click here to open the Employment Ontario Home page** link

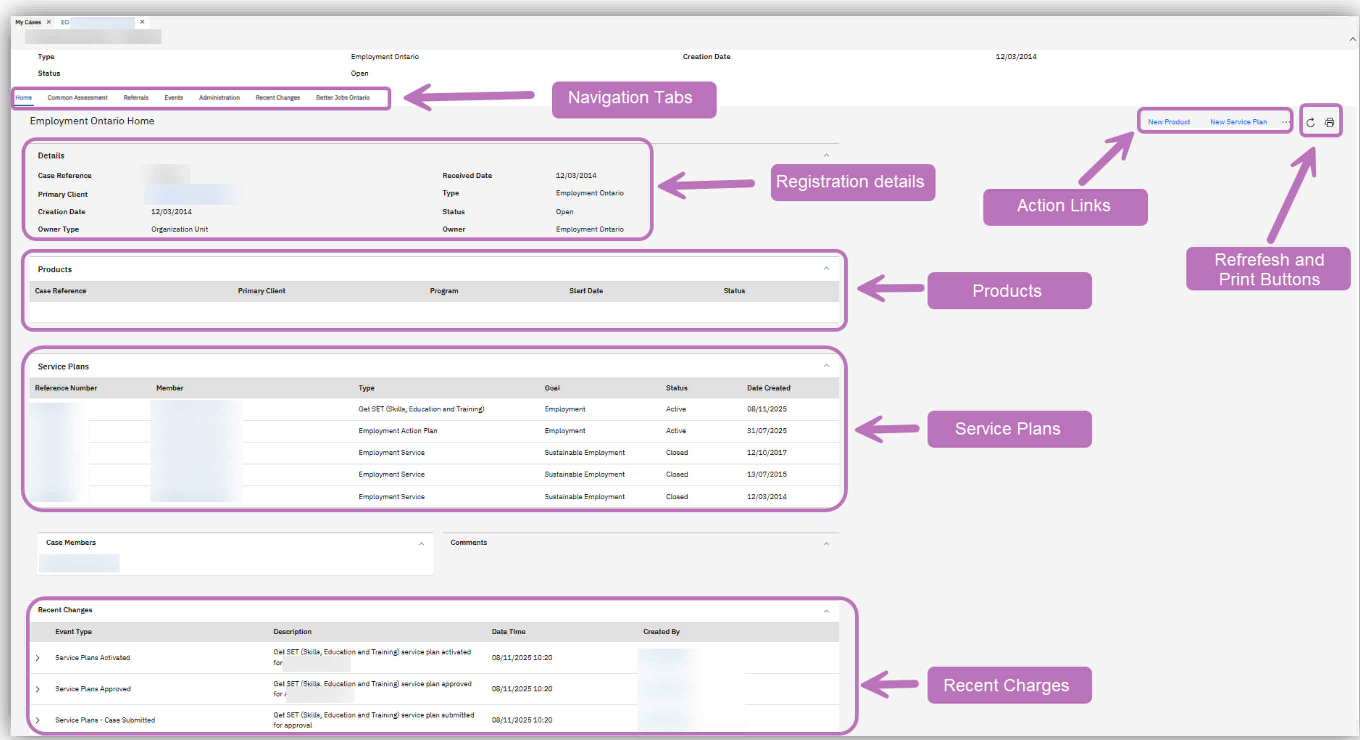


Employment Ontario Home Page Overview

The **Employment Ontario (EO) Home Page** provides a centralized view of a participant's engagement with EO programs. It displays key information such as registration details, service plans, products, and recent updates to the participant's file

EO Home Page Pannels

- **Navigation Tabs:** The navigation tabs allow staff to move through different sections of the participant's profile. The Home tab provides a high-level summary of all products and services associated with the participant's account, as well as recent changes.
- **Registration Details:** This section contains the participant's registration information, including case reference number.
- **Products:** This displays a list of all EO products/services the participant is registered for. Each product/service includes related statuses and key information.
- **Service Plans:** This area shows all EO services the participant is currently enrolled in.
- **Recent Changes:** This summarizes the most recent updates made to the participant's case, giving staff quick insight into modifications or new information added.
- **Action Links:** These links are used to add new products, services and notes as well as edit and update information
- **Refresh and Print Buttons**



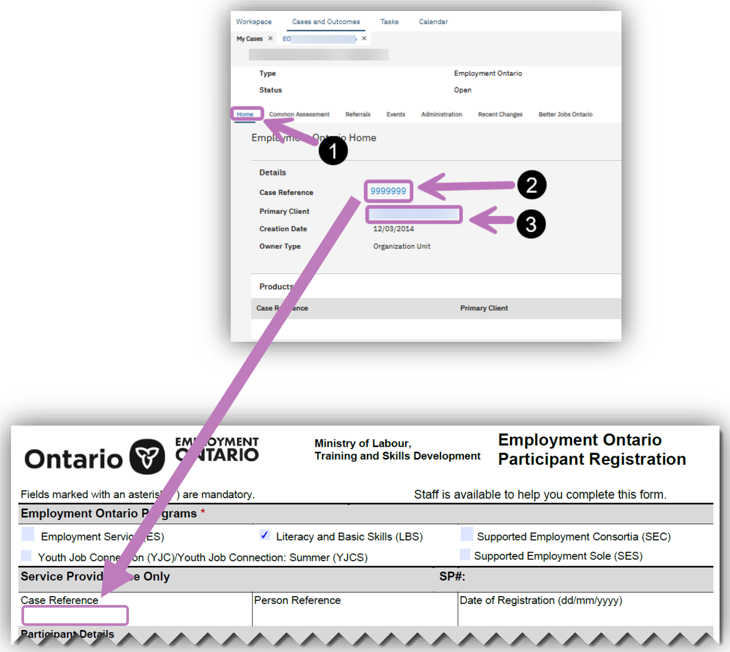
Recording the EO Case Reference Number

Once the EO Home page is open, it is important to record the EO case reference number on the Participant Registration Form (PRF).

Step 1: Click the **Home tab**

Step 2: Enter the **EO Case Reference Number** on the PRF

Step 3: Click **Primary Client** Name to open the participant profile page to update the background information.



Proceed to [Add or Update the Background Information]

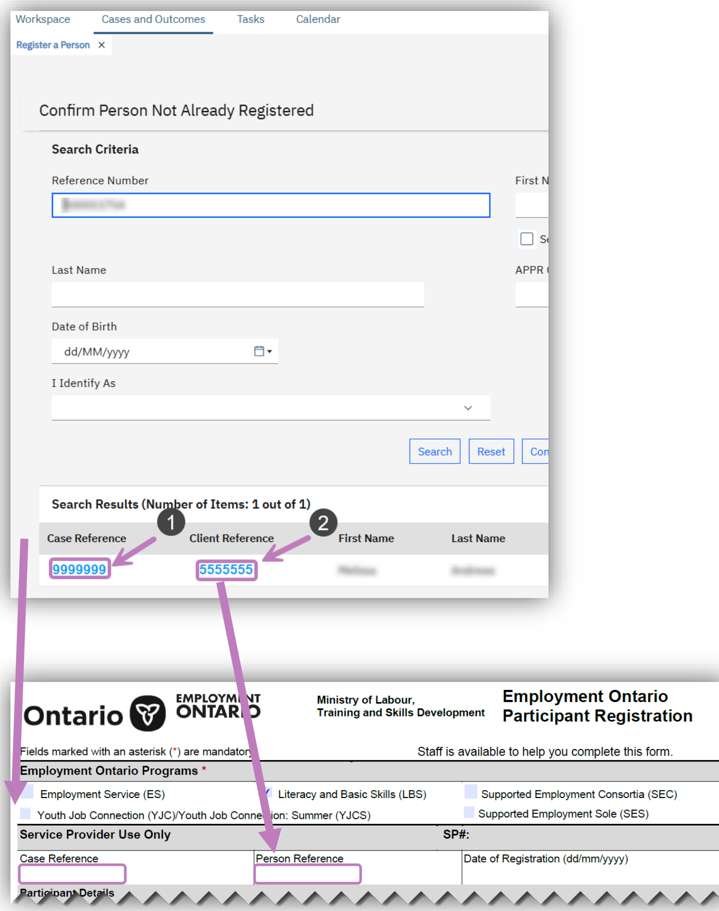
Update a Returning Participant's Client Profile

Recording the Reference Numbers for a Returning Participant

Step 1: Enter the **Case Reference Number** on the **Participant Registration Form (PRF)**

Step 2: Enter the **Person Reference Number** on the **PRF** and click on the **hyperlink.**

(This will open the **Participant's Profile Information Page**)

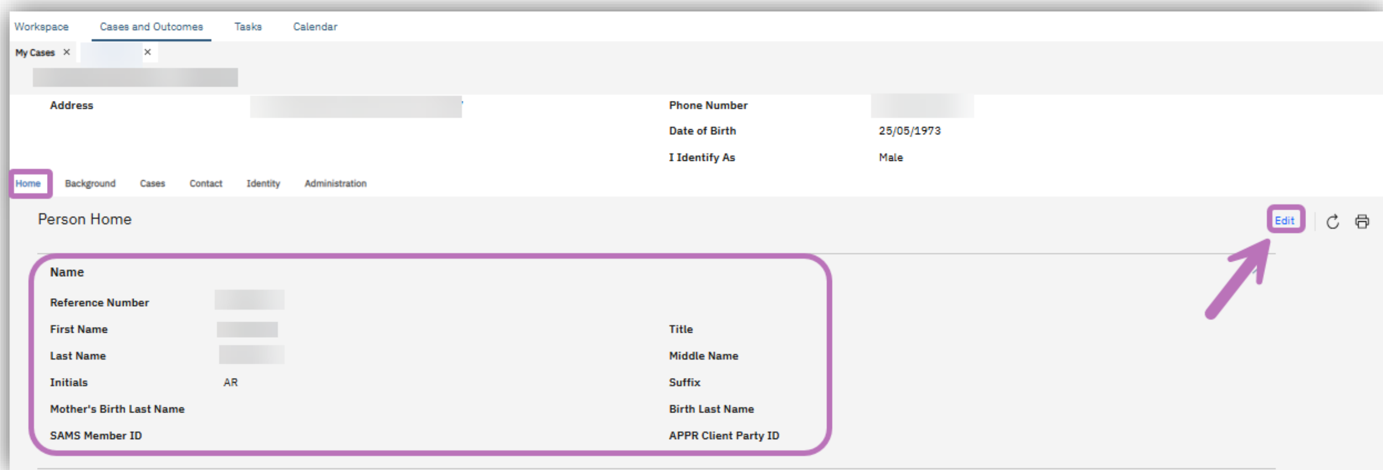


Participant's Profile Page

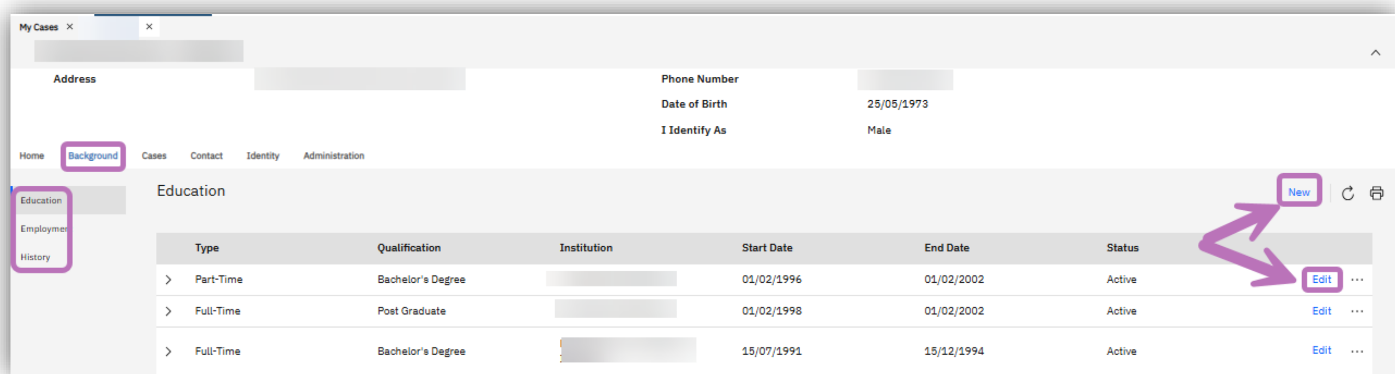
The participant's Profile Information Page provides a centralized view of a participant's personal information that they provided when they registered. It displays key information such as personal details, address, education, employment and social insurance ID. It is important to view all the information to ensure its accuracy and add/edit the information if applicable. The Profile Information Page can be accessed by clicking on the [Participant's Name](#) hyperlink.

Participant's Profile Tabs

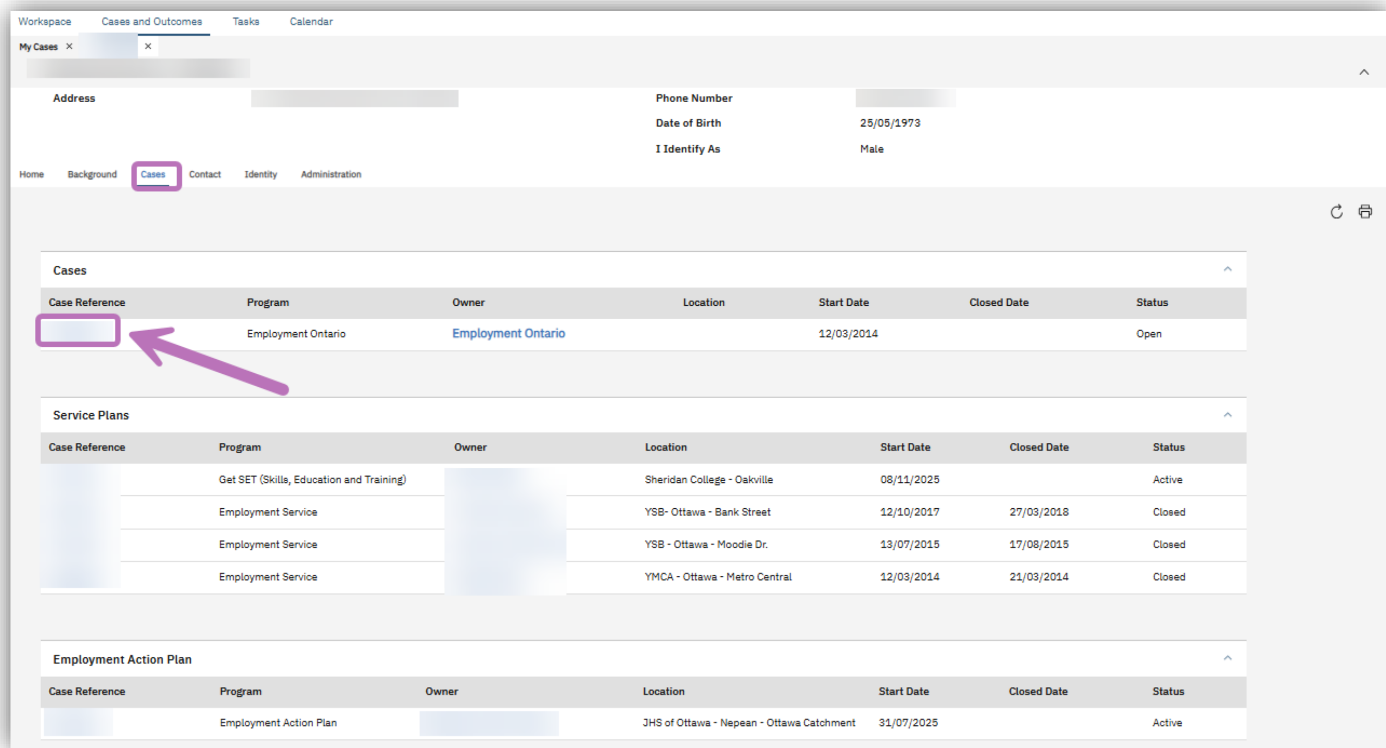
- **Home Tab:** This is where you can view and edit the participant personal information.



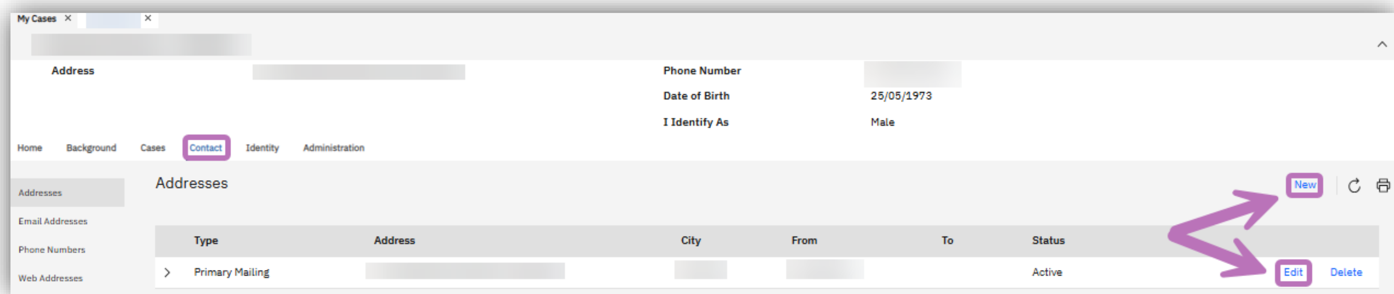
- **Background Tab:** This is where you can view, add and edit the participant's education and employment history.



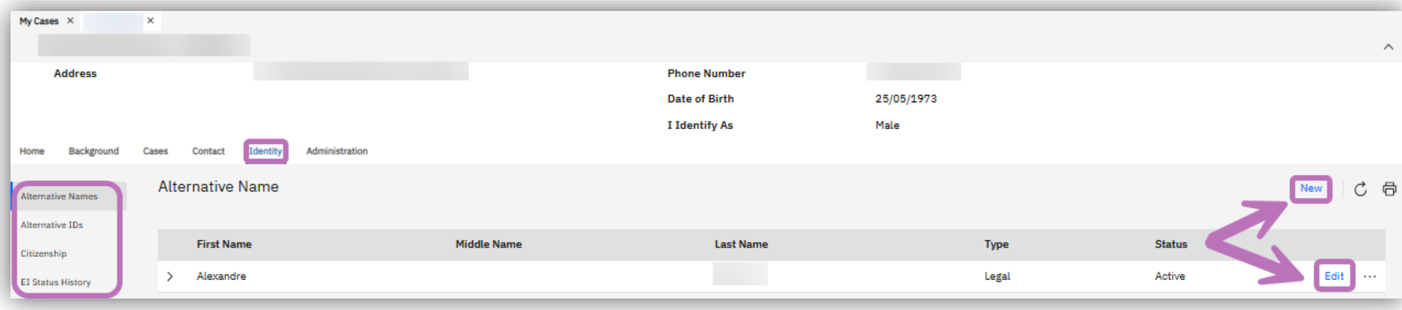
- **Cases Tab:** This is where you can view the participants EO Home page. You can click on the case number hyperlink to go to the EO Home page.



- **Contact Tab:** This is where you can view, add and edit the participant's contact information. This includes address, email address, phone numbers and web addresses.



- **Identity Tab:** This is where you can view, add and edit the participant's identity. This includes Alternative Names (preferred Name), Alternative ID's (Social Insurance Number) and Citizenship.



Add or Update the Background Information

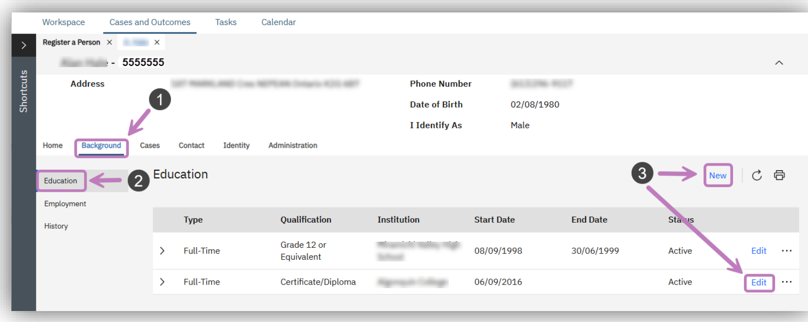
Entering a participant's background information is essential. It helps determine eligibility and supports the accurate collection of program data and statistics.

Enter and/or Update the Education Information

Step 1: Click on the **Background** tab

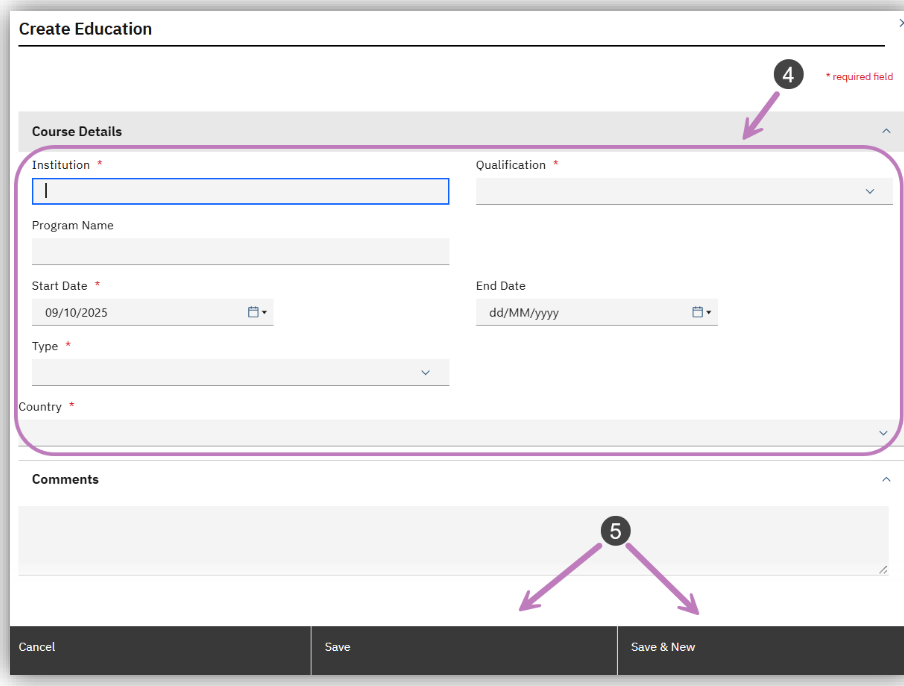
Step 2: Click **Education** in the tab content bar

Step 3: Click **New** or **Edit**



Step 4: Enter the **Education Information** from the PRF

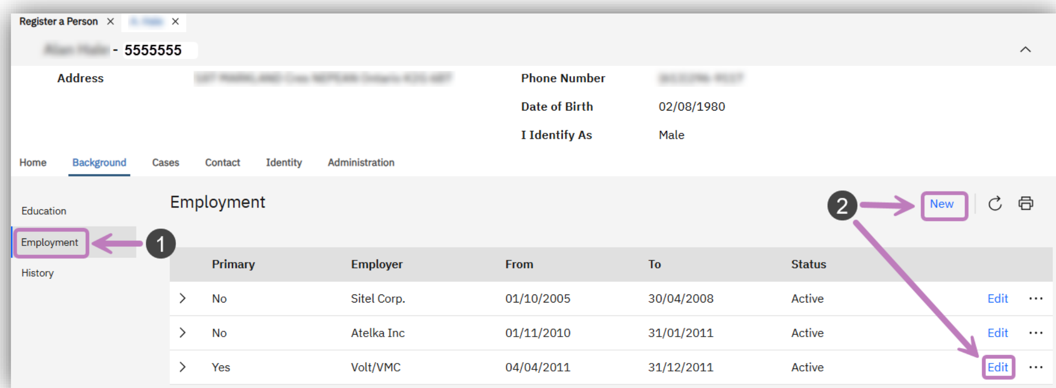
Step 5: Click **Save** or **Save & New** if there is more than one entry



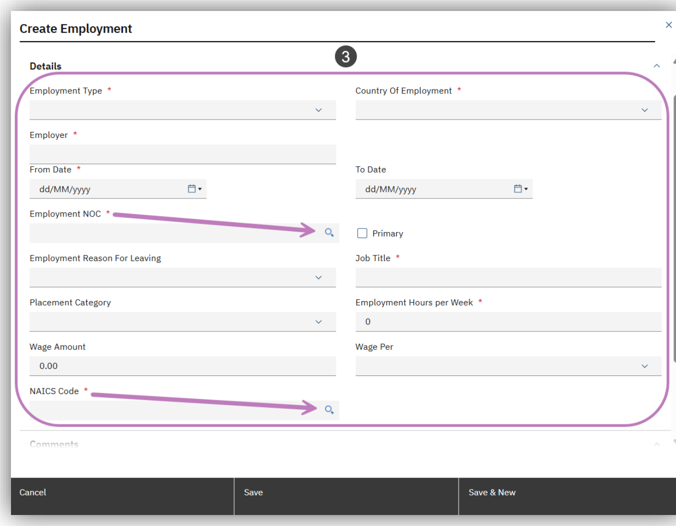
Enter and/or Update the Employment Information

Step 1: Click **Employment** in the tab content bar

Step 2: Click **New** or **Edit**



Step 3: Enter the **Employment Information** from the PRF



*[National Occupational Classification (NOC)]() codes and [North American Industry Classification System (NAICS)]() codes are entered by clicking the **magnifying glass icon** beside the field.*

*Users must **look up the NOC and NAICS codes** before entering them. This can be done by searching online using a web browser or the NOC and NAICS Canadian official site at the links above.*

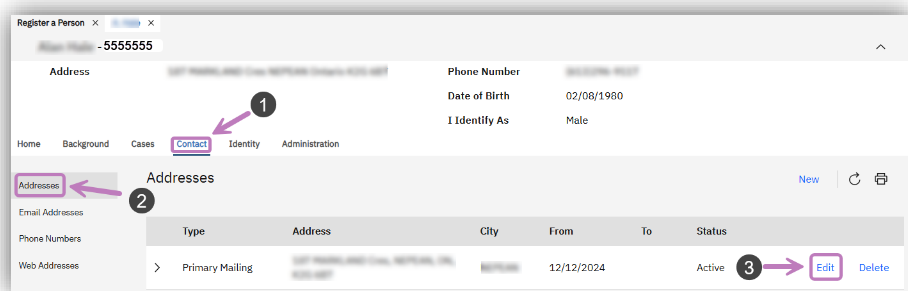
*Each Get SET program may collect client data in a different way. It is important for the user to be aware of which **data fields are required** for their specific program or site.*

Modifying the Address

Step 1: Click on the **Contact** tab

Step 2: Select **Addresses** in the tab content bar

Step 3: Click **Edit** next to the address that requires modification



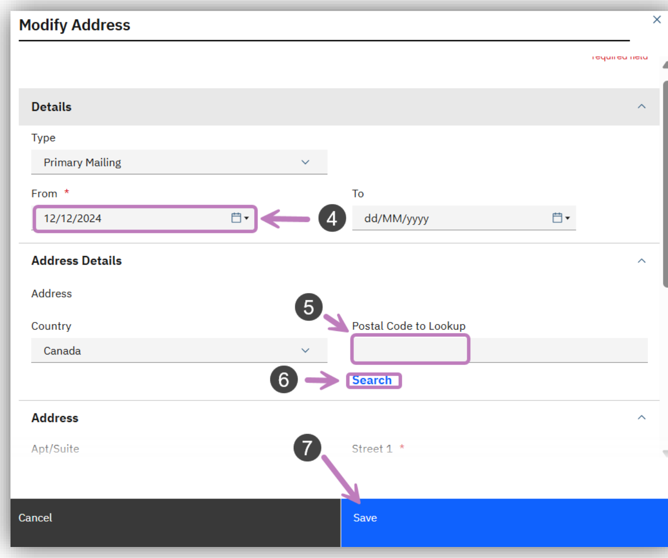
*Do **not** click **New** to change an address. This may result in **overpayments** for clients with active product delivery cases who are registered in **other EO programs** outside of Get SET.*

Step 4: Type in the date (*dd/mm/yyyy*) or use the calendar to enter the **current date.**

Step 5: Enter the **Postal Code**

Step 6: Click **Search** (follow the steps outlined in Entering an Address)

Step 7: Click **Save**



*Change the **From** date and leave the **To** date blank. The **From** date is the date the participant completed the registration*

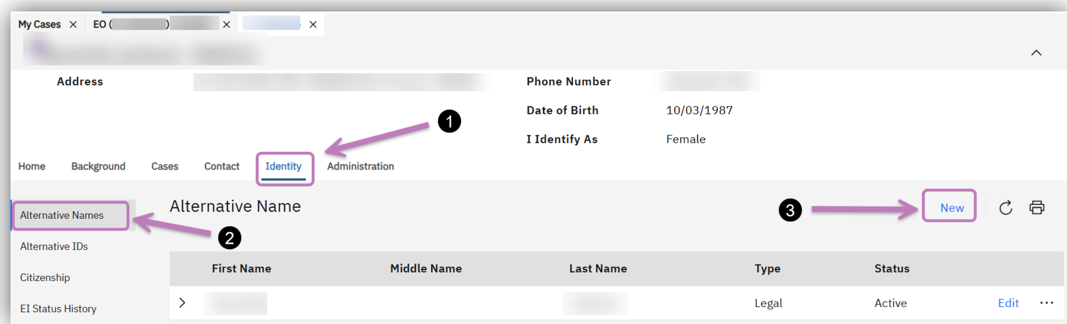
Adding a Preferred Name

Some participants may use a preferred name that differs from their legal name. Enter the preferred name as follows:

Step 1: Click on the **Identity** tab

Step 2: Click **Alternative Names** in the tab content bar

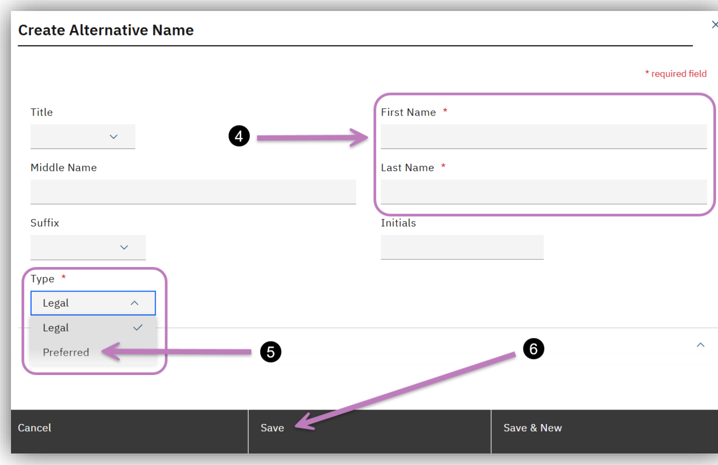
Step 3: Click **New**



Step 4: Enter the **Preferred Name**

Step 5: Select **Preferred**

Step 6: Click **Save**



Adding or Updating the Social Insurance Number

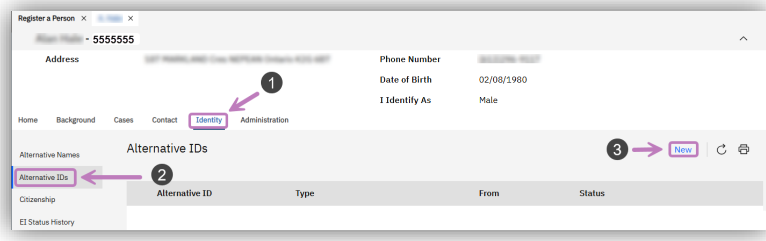
Some participant accounts may not have a **Social Insurance Number (SIN)** recorded or there may be some participants who have a temporary 900 series that will need to be updated.

A Social Insurance Number is required to proceed with the participant's registration in EOIS-CaMS.

Step 1: Click on the **Identity** tab

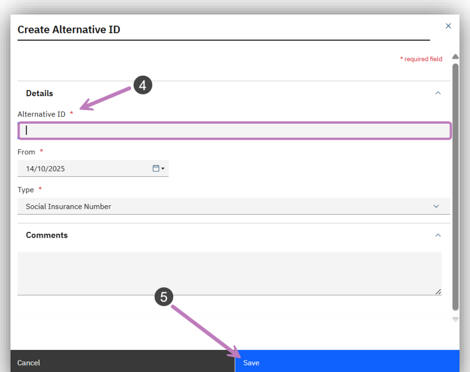
Step 2: Click **Alternative IDs** in the tab content bar

Step 3: Click **New**



Step 4: Enter the **Social Insurance Number**

Step 5: Click **Save**



Adding a Service Plan

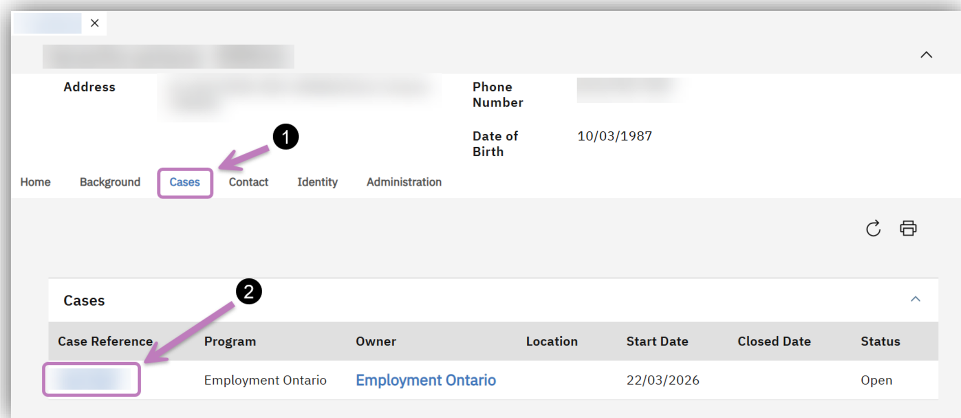
The **Service Plan** is created to register the participant into the service provider's program. This is where all relevant data will be stored throughout the participant's involvement in the program.

Open the Employment Ontario Home Page

There is a way to get to the EO home page from the Participant's profile page. This is where you will add the Service Plan.

Step 1: Click on the **Cases** tab

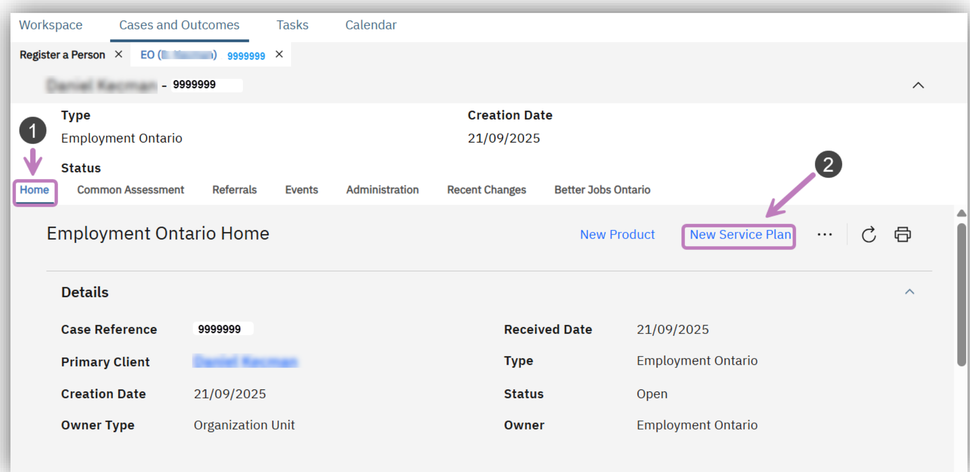
Step 2: Click the **Case Reference** number



Adding a New Service Plan

Step 1: Go back to the **EO Home Page**

Step 2: Click **New Service Plan**



Step 3: Select all required fields from the drop-down menus:

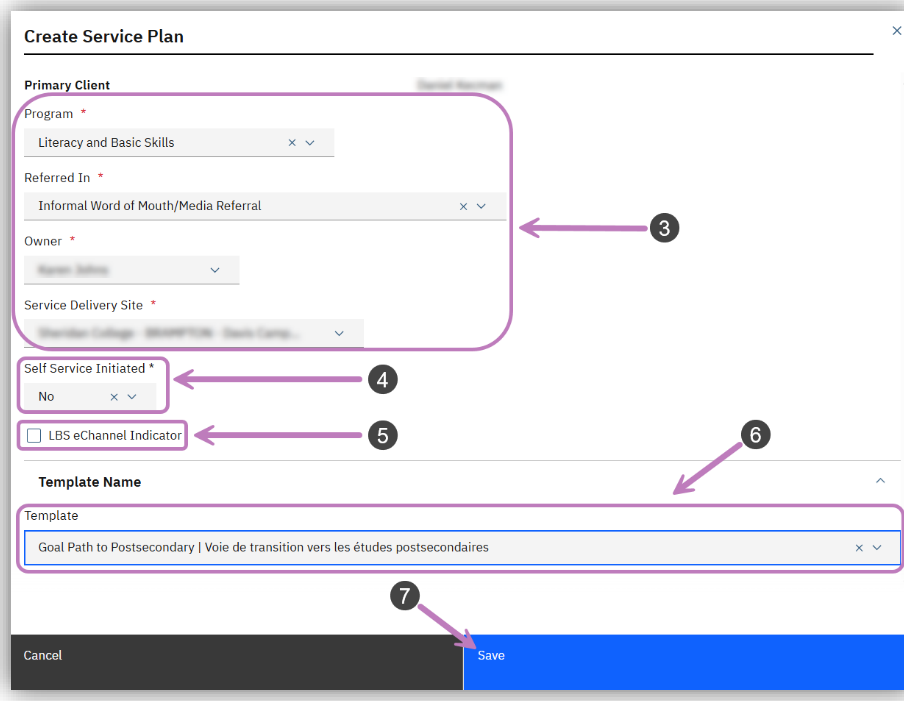
- **Program:** Get SET
- **Referred In:** located in the **Client Summary** section of the PRF
- **Owner:** the name of the user creating the plan
- **Service Delivery Site:** the name of your site

Step 4: Self Service Initiated: Select this if an online **Request an Appointment with a Service Provider (RASP)** application was submitted by the participant

Step 5: Get SET (LBS) e-Channel Indicator– select only if your program is one of the 5 Ministry designated Get SET e-Channel providers

Step 6: Template: this refers to the **goal path**, indicated in the **Client Summary** on the PRF

Step 7: Click **Save**



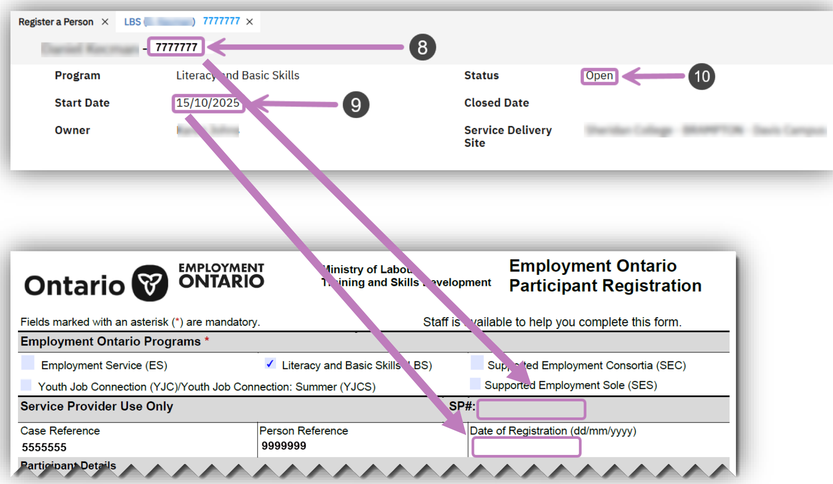
Recording the Service Plan Number and Registration Date

Step 8: Enter the **Service Plan Number** on the **Participant Registration Form (PRF)**

There is no designated field for the Service Plan # on the PRF, but it can be written at the top of the PRF.

Step 9: Enter the **Start Date** (*dd/mm/yyyy*) on the PRF

Step 10: The **Status** will display as **"Open"**, as the plan has not yet been submitted for approval within the system



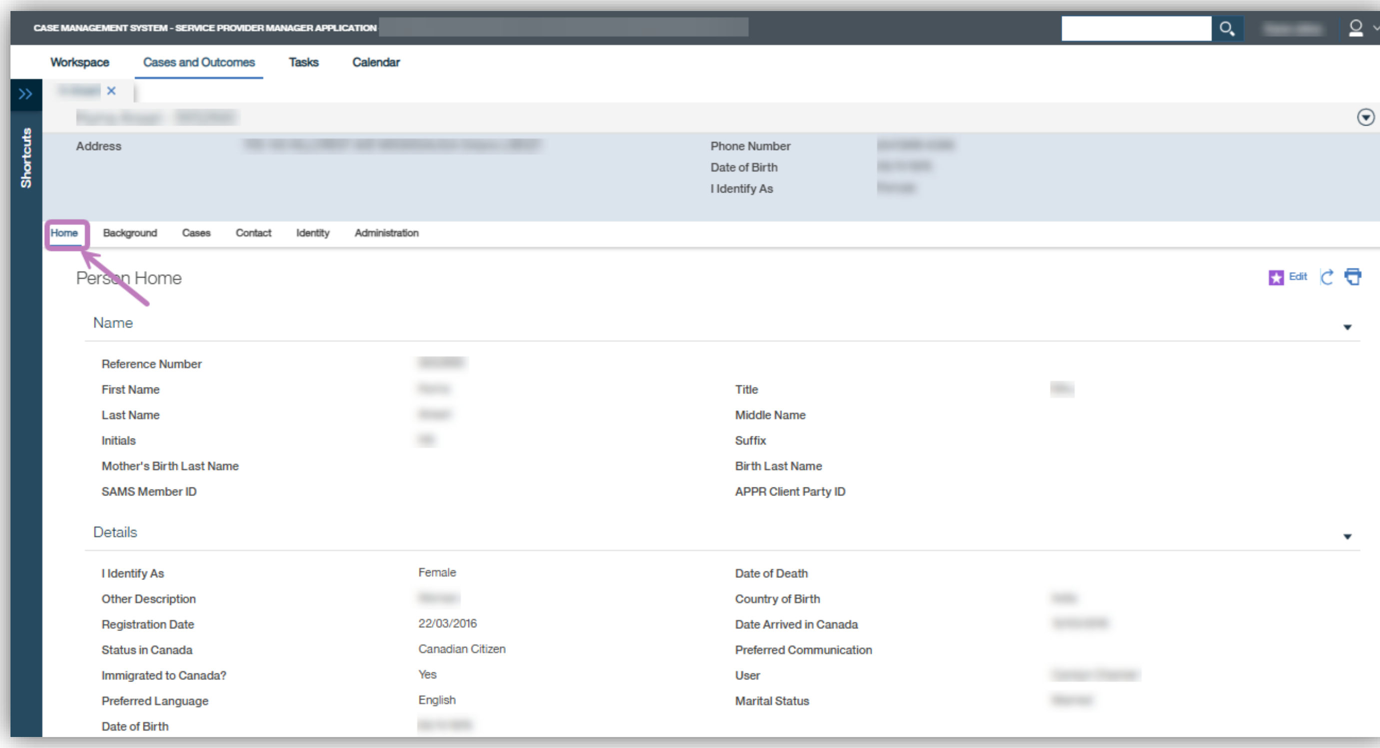
Participants may have open or active service plans with other Employment Ontario programs, including with another Get SET service provider.

The list of ***Service Plans*** *for a specific participant that have* ***not been closed*** *can be viewed by clicking* ***View My Cases*** *in the* ***Shortcuts*** *menu on the* ***Workspace*** *page.*

From this list, participant cases can be easily accessed by clicking the ***hyperlinks****, which will open the corresponding EO case and service plan.*

Participant and Case Home Pages

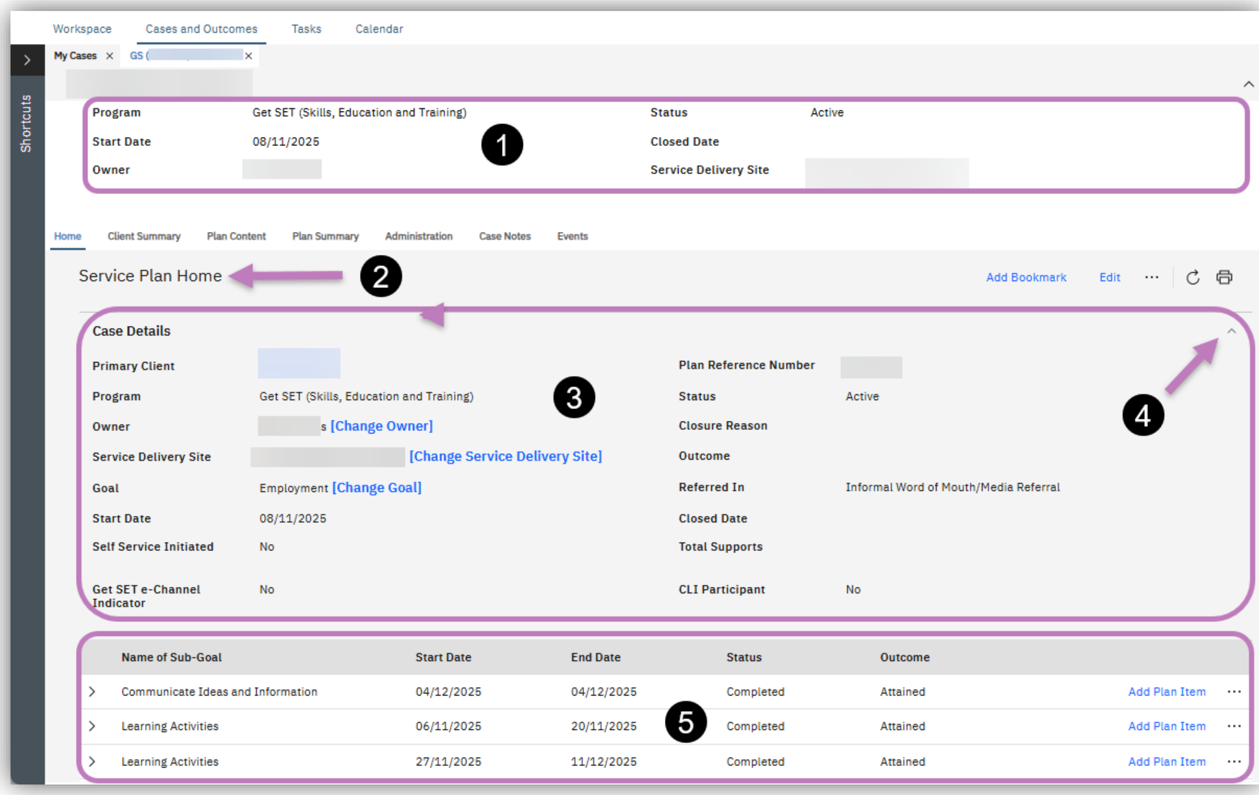
The following is an overview of the components of the participant and case home pages. These pages serve as the central hub for managing individual participant or case information once the service plan has been created. You can access them by clicking the **Home Tab** within a participant's profile or case file.



Main Content Area

Each EOIS-CaMS page includes a structured layout with five key areas:

1. **Context Panel**: Provides a summary of key information related to the current case or participant profile.
2. **Page Title**: Displays the title of the current page being viewed.
3. **Information Panel**: Displays learner information and includes hyperlinks to open related pages for viewing or editing.
4. **Toggle Buttons**: Located at the top-right corner and left-hand side of system pages and panels. These allow users to expand or collapse sections of the page for easier viewing.
5. **Plan Content Panel**: This panel displays all information entered in the **Plan Content** tab, allowing users to view and manage service plan details.

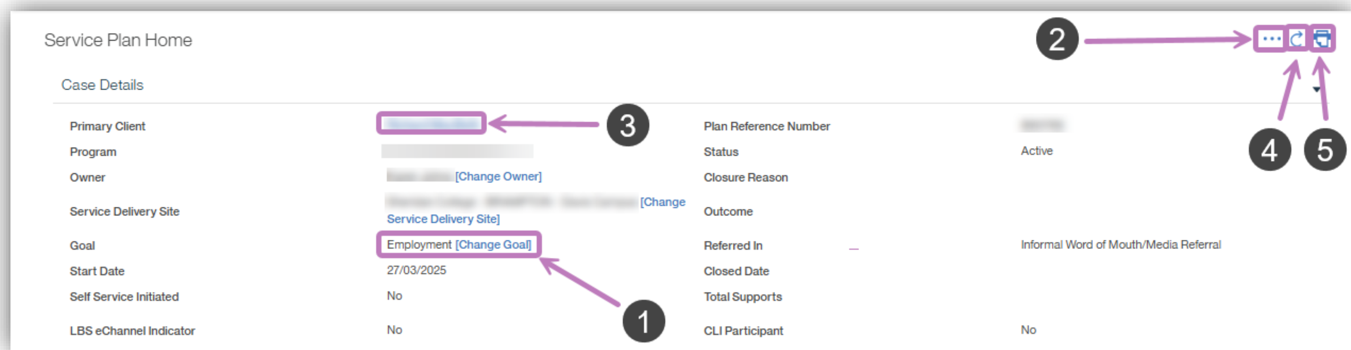


Navigating the Main Content Area

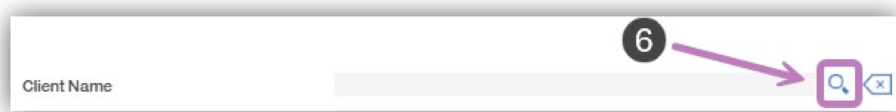
Within the main content area, there are **five types** of clickable text and buttons that will perform an action when selected. These are shown and described below**.**

Within the **Main Content Area**, EOIS-CaMS uses several types of interactive elements to help users perform actions and access information.

1. **Action**: Blue-coloured text that performs a system function when selected (e.g., Change Goal, Change Owner, Change Service Delivery Site).
2. **Action Button**: Represented by three dots (···), this button opens a drop-down menu with context-specific actions. Multiple action buttons may appear on a page; each is linked to different items.
3. **Hyperlink**: The learner's name the takes you to their Person Home page.
4. **Refresh Button**: Updates the page to ensure the most current data is displayed.
5. **Print Button**: Allows the user to print the current page.



6. **Magnifying Glass Icon**: Used to perform searches within the system.

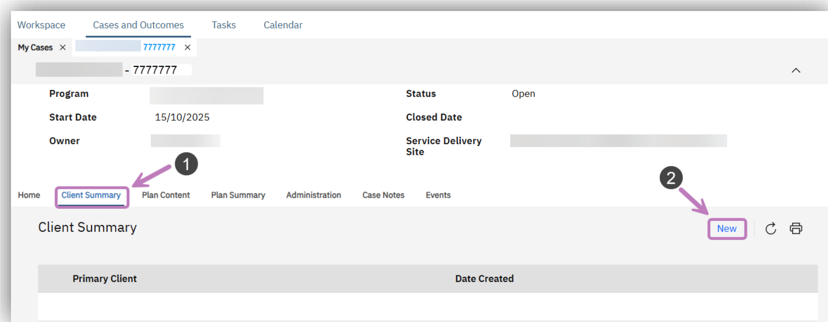


*Mandatory fields are marked with a **blue asterisk (*)**. All dates must be entered in the format **dd/mm/yyyy**.*

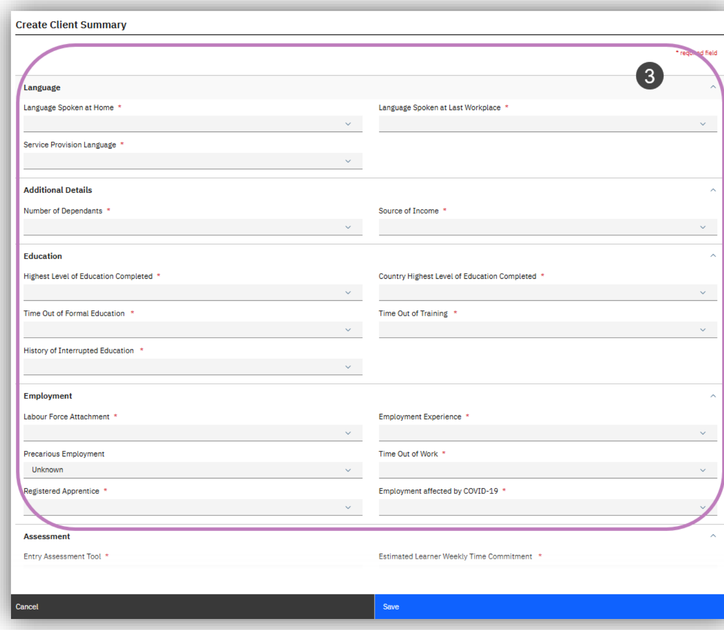
Entering the Client Summary

Step 1: Click on the **Client Summary** tab

Step 2: Click the **New** button



Step 3: Enter all applicable fields from the **Client Summary** section of the PRF



Step 4: Select the **Assessment Tool** used to assess the participant

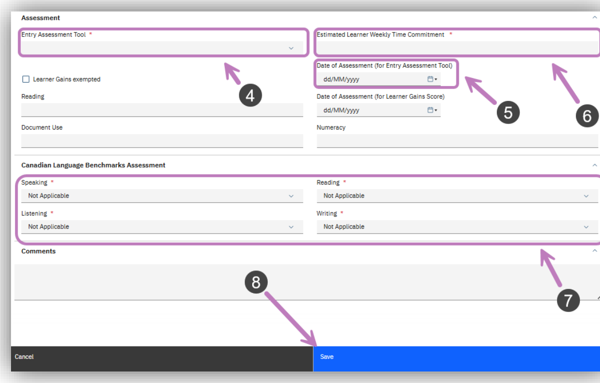
Step 5: Enter the **Date of Assessment** (*dd/mm/yyyy)* for Entry Assessment Tool; this is the date the participant completed the intake assessment

Step 6 Enter the **Estimated Learner Weekly Time Commitment** (located at the top of the **Notice of Decision** on the PRF)

> *This includes the total of both in-class hours and "on your own" hours.*

Step 7: Enter the **Canadian Language Benchmarks** results if applicable (not mandatory)

Step 8: Click **Save**



Adding Sub-Goals and Plan Items

As mentioned in the previous section, each Get SET program has its own process for collecting and organizing learner data for entry into EOIS-CaMS. When entering **Sub-Goals** and **Plan Items** into EOIS-CaMS, users should refer to the information provided by their Get SET program manager to ensure accurate and complete data entry.

Sub-Goals and Plan Items can be added:

- at the **beginning** of the service plan
- **during** service delivery
- **before closure** of the learner's plan

After adding a **Sub-Goal**, the user must add a corresponding **Plan Item**.

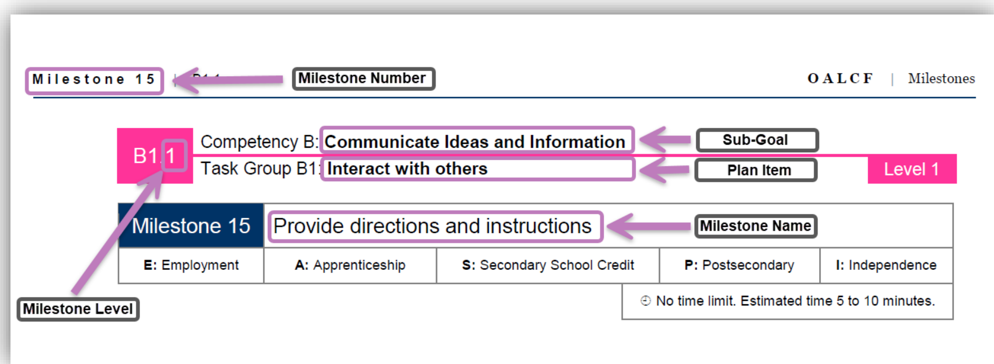
*The **Delivery Method** field in the **Plan Item** is **mandatory** for both **Milestones** and **Learning Activities**. The options in the drop-down menu are based on the program's delivery approach (e.g., Classroom, One on One, or e-Channel).*

*The **Blended** field is checked off only for a learner who is concurrently registered in both a face-to-face and an e-Channel Get SET program.*

*Use the **Comment Boxes** to provide additional context or clarification as needed.*

Adding Milestones

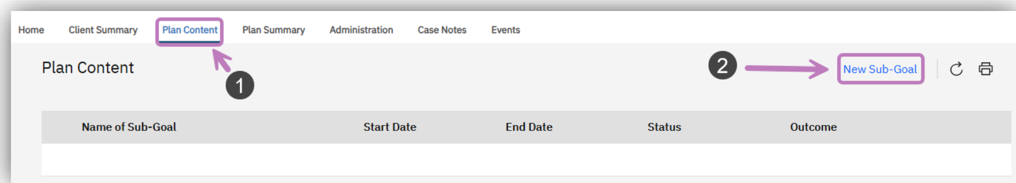
Milestones are Ministry-required assessments completed by the learner during their time in the program. All milestone information is located at the **top of the Milestone Assessment** document that is administered to the learner.



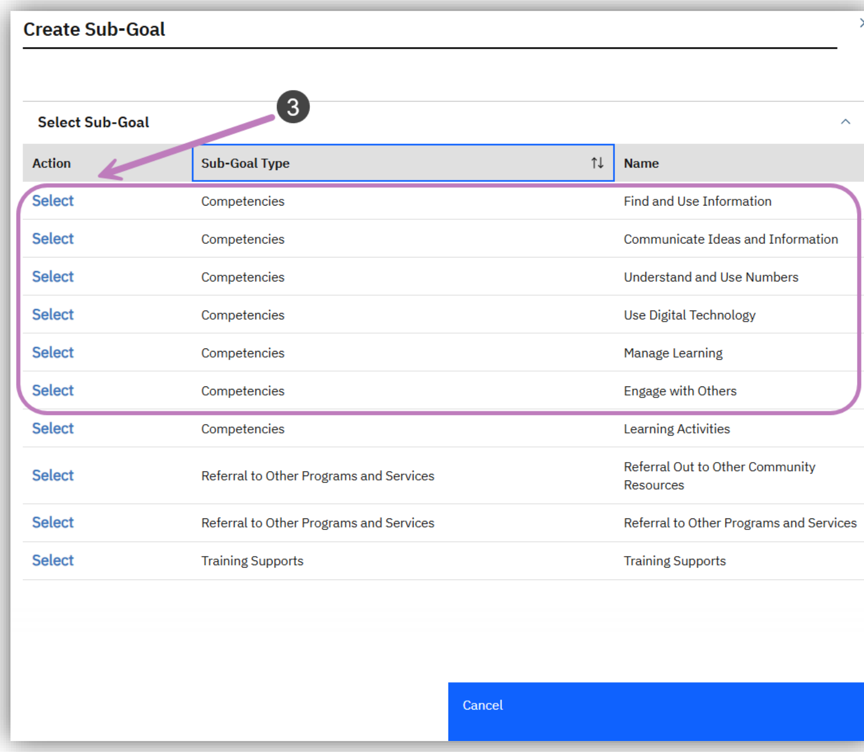
Creating the Milestone Sub-Goal

Step 1: Click the **Plan Content** tab

Step 2: Click **New Sub-Goal** to add a new Sub-Goal

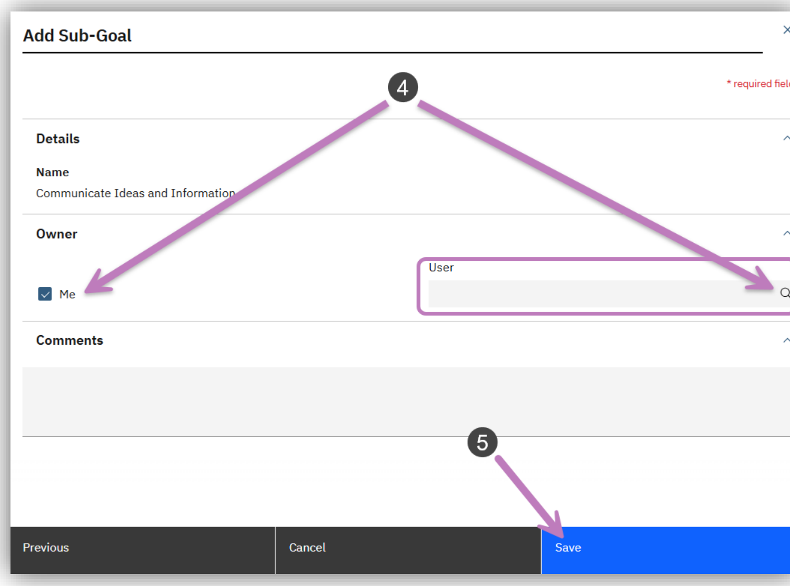


Step 3: Select a **Milestone Sub-Goal** from the list



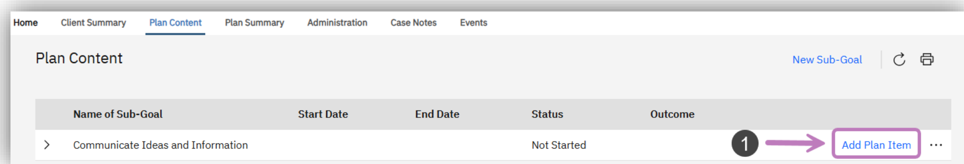
Step 4: Click the checkbox 'Me' to assign yourself as the owner or click on the **Search Icon** to select a different registered user from your program staff.

Step 5: Click **Save**



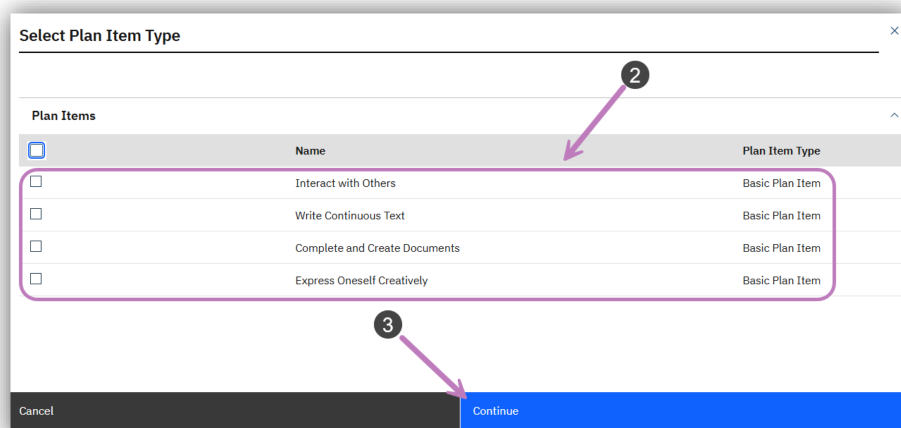
Creating a Milestone Plan Item

Step 1: Click **Add Plan Item**



Step 2: Select the appropriate **Plan Item**

Step 3: Click **Continue**



Step 4: Enter the **Expected Start Date** and **Expected End Date**

Use your organization's defined dates or the system's default dates

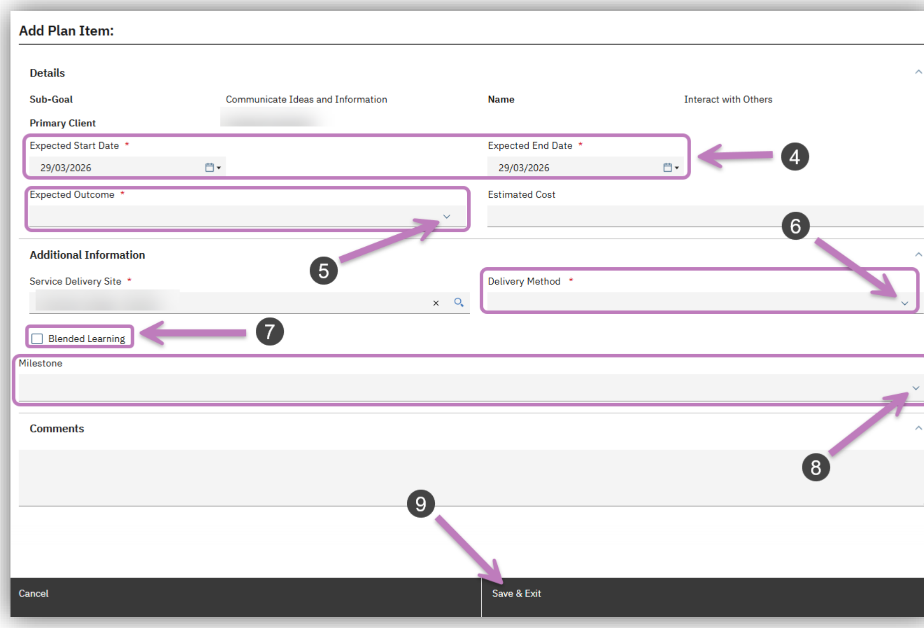
Step 5: Select the **Expected Outcome** (this is the **Milestone level**)

Step 6: Select the **Delivery Method**

Step 7: Select **Blended** for a learner who is concurrently registered in **both** a face-to-face and an e-Channel Get SET program.

Step 8: Select the **Milestone**

Step 9: Click **Save & Exit**

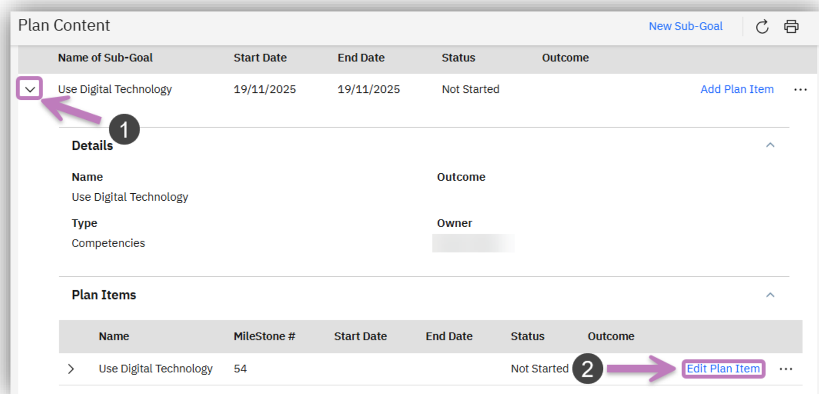


Updating the Milestone to In Progress

Learners are excluded from the Ministry's annual "Learners Served" target for your site if their milestone is set to **Not Started**. Update the milestone to **In Progress** to ensure they are included in the count. (If more than one milestone is entered, only one needs to be set to **In Progress** to count toward Learners Served.)

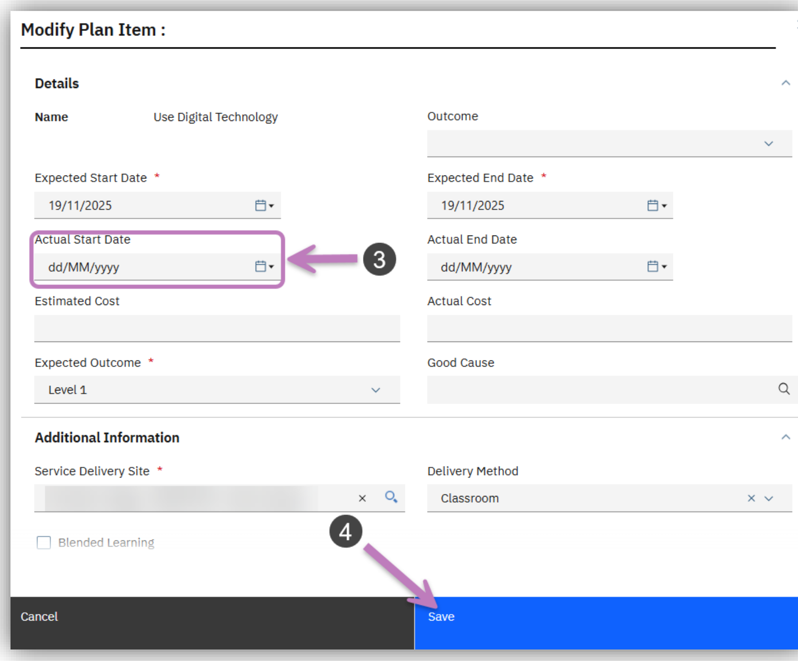
Step 1: Click the **Arrow** to expand

Step 2: Click **Edit Plan Item**

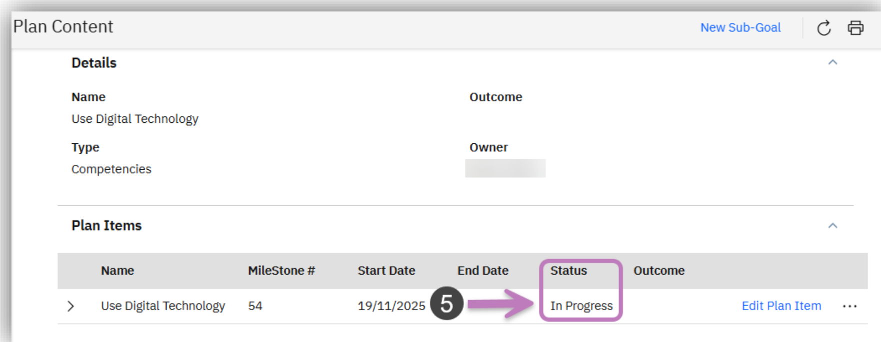


Step 3: Enter the **Actual Start Date**

Step 4: Click **Save**



Step 5: Ensure the Status is In Progress



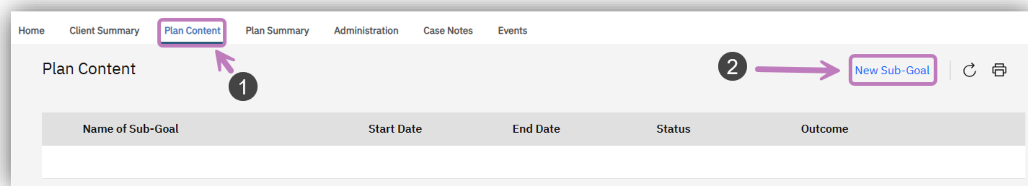
Adding Learning Activities

Learning Activities refer to a variety of structured learning experiences that the learner engages in during their time in the Get SET program. Each Get SET program has its own process for entering learning activities in EOIS-CaMS.

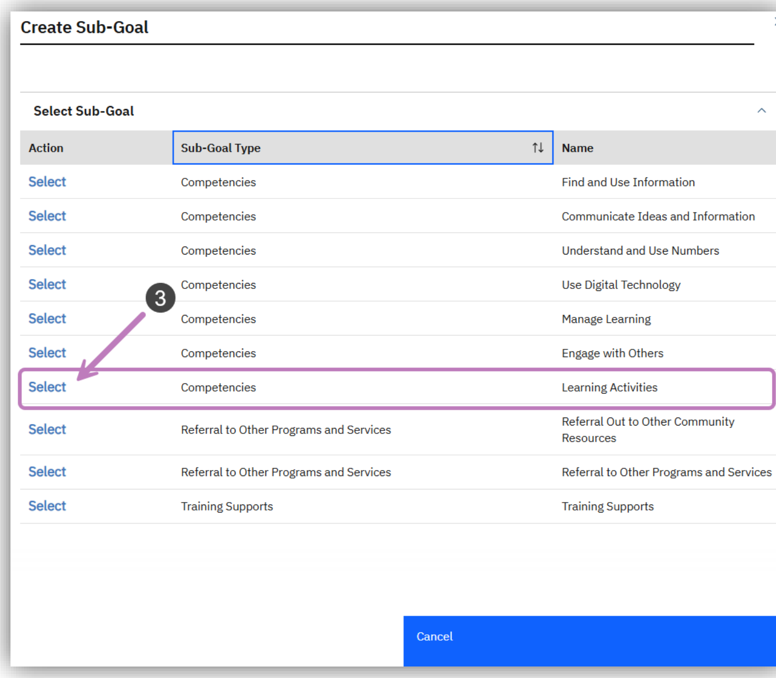
Creating a Learning Activities Sub-Goal

Step 1: Click on the **Plan Content** tab

Step 2: Click **New Sub-Goal** to add a new Sub-Goal

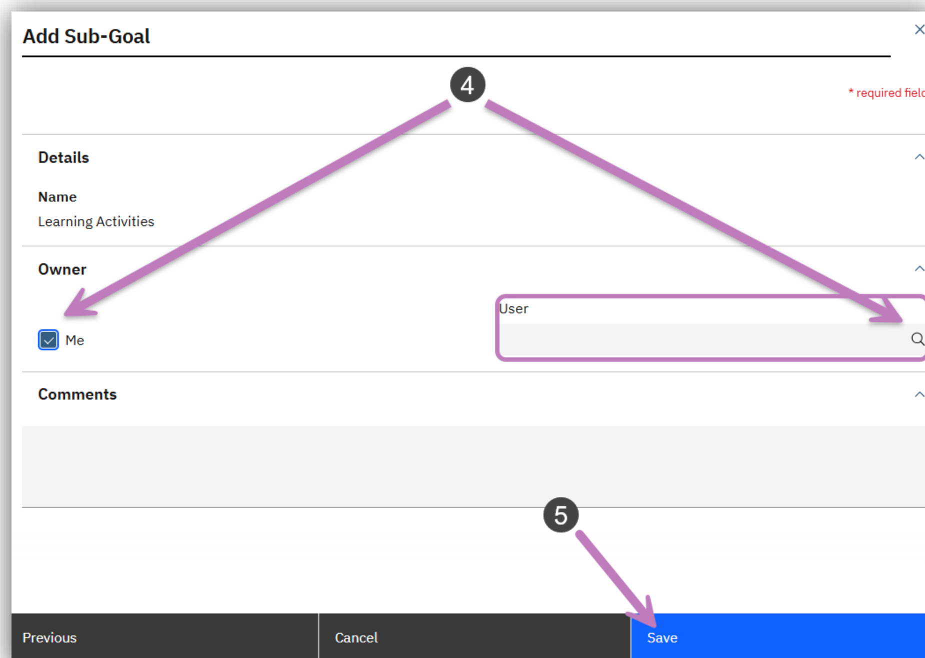


Step 3: Select **Learning Activities Sub-Goal**



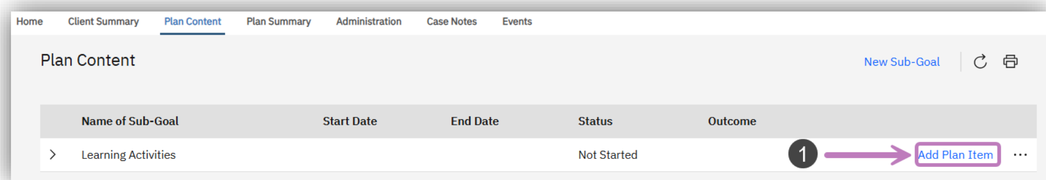
Step 4: Click the checkbox 'Me' to assign yourself as the owner or click on the **Search Icon** to select a different registered user from your program staff

Step 5: Click **Save.**



Creating a Learning Activities Plan Item

Step 1: Click **Add a New Plan Item**

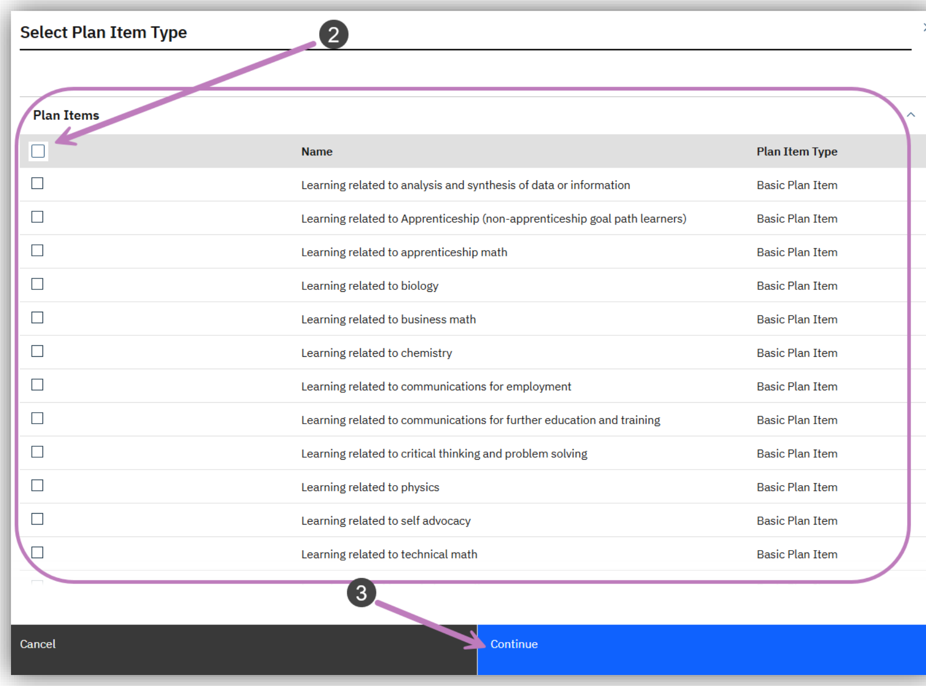


Step 2: Select the appropriate **Plan Item** from the list

If the desired item is not listed, select a Custom Basic Plan Item and click the link below.

[***Creating Custom Basic Plan Item***]

Step 3: Click **Continue** to proceed



Step 4: Enter the **Expected Start Date** and **Expected End Date**

> *These dates reflect when the learner is expected to begin and complete the learning activity.*

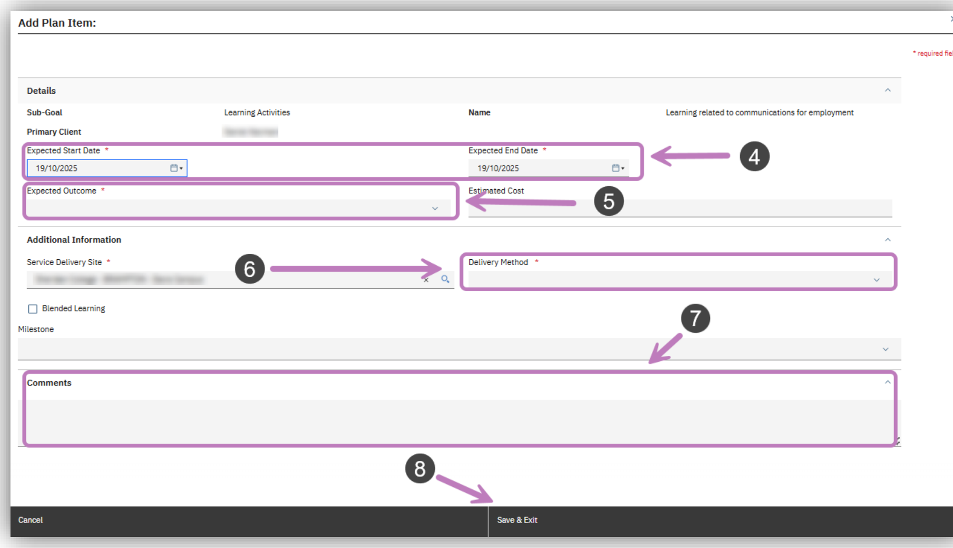
Step 5: Select the **Expected Outcome**

> *Related Learning Achieved" should be the only option in the drop-down*

Step 6: Select the **Delivery Method** from the drop-down menu

Step 7: Enter the **Activity Information** (optional)

Step 8: Click **Save & Exit**



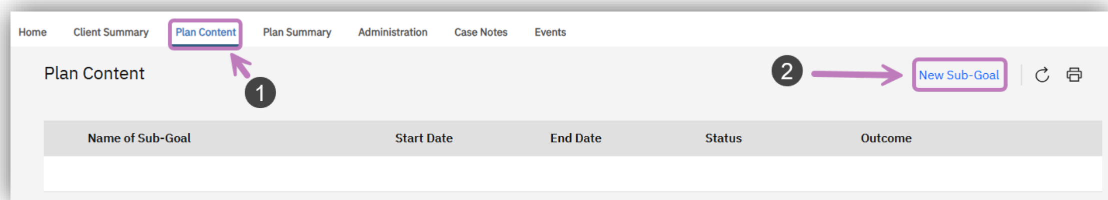
Adding Training Supports

Most Get SET programs receive funding to provide Training Supports to eligible learners. These monetary supports assist learners with costs of childcare, transportation, and sometimes other relevant expenses.

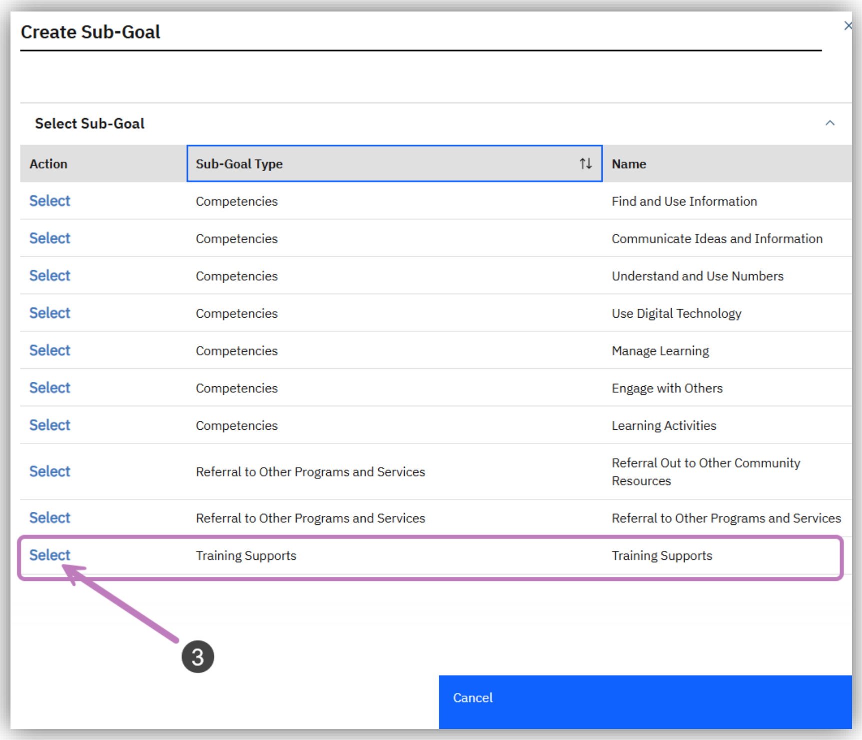
Creating a Training Support Sub-Goal

Step 1: Click on the **Plan Content** tab

Step 2: Click **New Sub-Goal** to add a new Sub-Goal

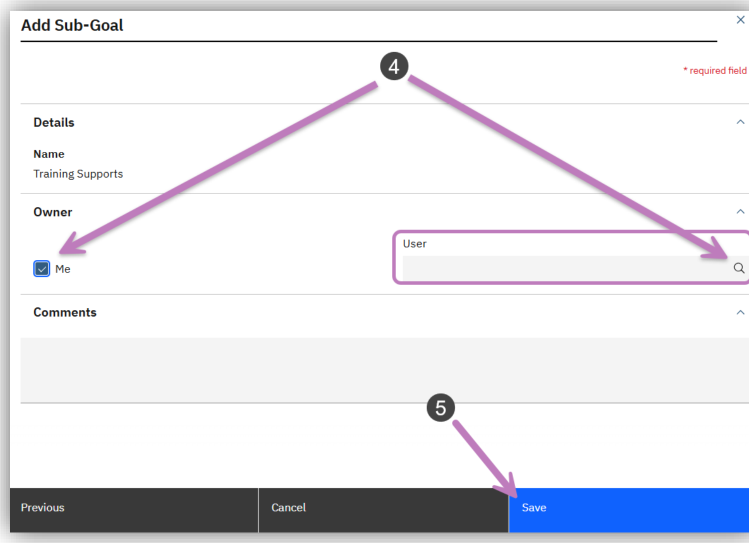


Step 3: Select the **Training Supports** Sub-Goal



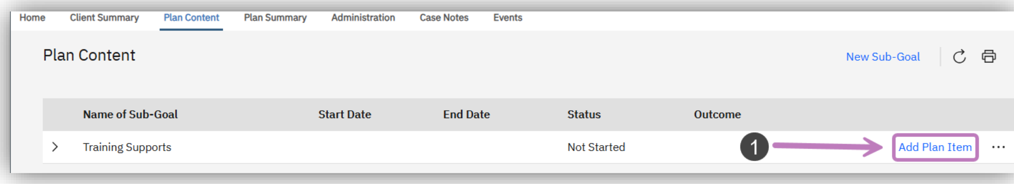
Step 4: Click the checkbox 'Me' to assign yourself as the owner or click on the **Search Icon** to select a different registered user from your program staff

Steps 5: Click **Save**



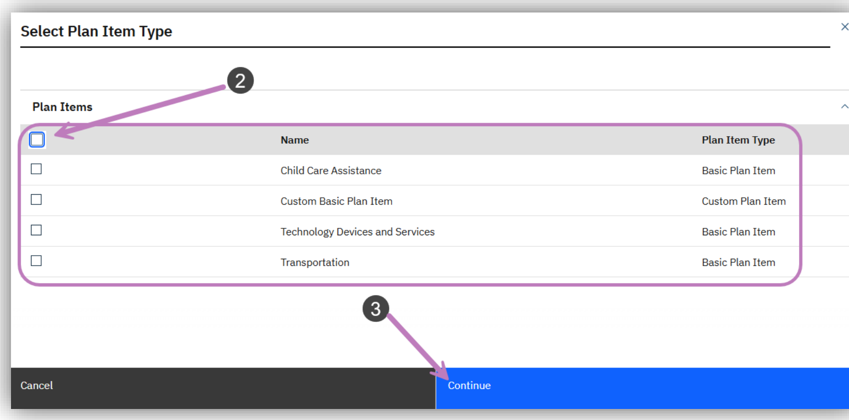
Creating a Training Support Plan Item

Step 1: Click **Add Plan Item**



Step 2: Select the **Appropriate Plan Item Type**

Step 3: Click **Continue** to proceed



Step 4: Enter the **Expected Start Date** and **Expected End Date**

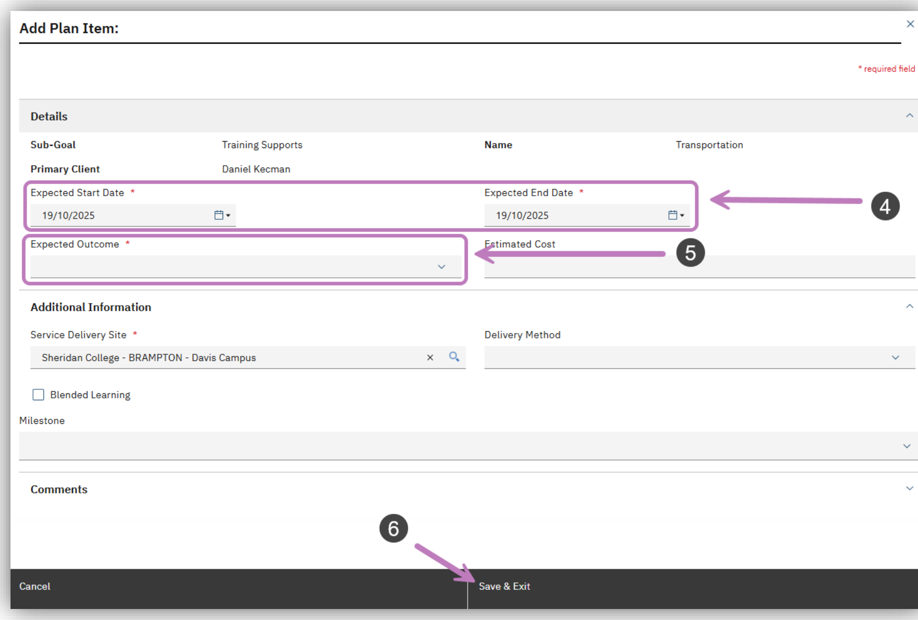
- The **Start Date** is when the support begins.
- The **End Date** is when the support ends or the end of the fiscal year (March 31).

If the learner continues to receive support after March 31 (end of the fiscal year), a new Plan Item must be created starting April 1.

Step 5: Select the **Expected Outcome**

- The only valid option for this plan item is **Support Paid**.
- **Estimated Cost**: Optional - enter if known.
- **Delivery Method** and **Milestone**: Not required for this item.

Step 6: Click **Save & Exit**



Adding a Referral

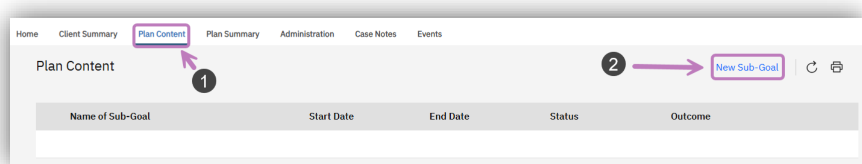
Learners may be referred out to other programs, agencies and services at entrance, during service and at exit. As part of the contractual agreement with the Ministry, all Get SET sites are required to record and document **learner referrals** within two general categories: **Referral - Other Programs and Services** or **Referral Out to Other Community Resources**. These referrals are tracked in EOIS-CaMS through a dedicated **Referral Sub-Goal** and associated **Plan Item**.

In general, "Referral - Other Programs and Services" is intended to record referrals to services within Employment Ontario and other funded training/education providers, e.g., when a learner is referred to another Get SET program. "Referral Out to Other Community Resources" may include referrals to outside services such as childcare, social assistance, housing, etc.

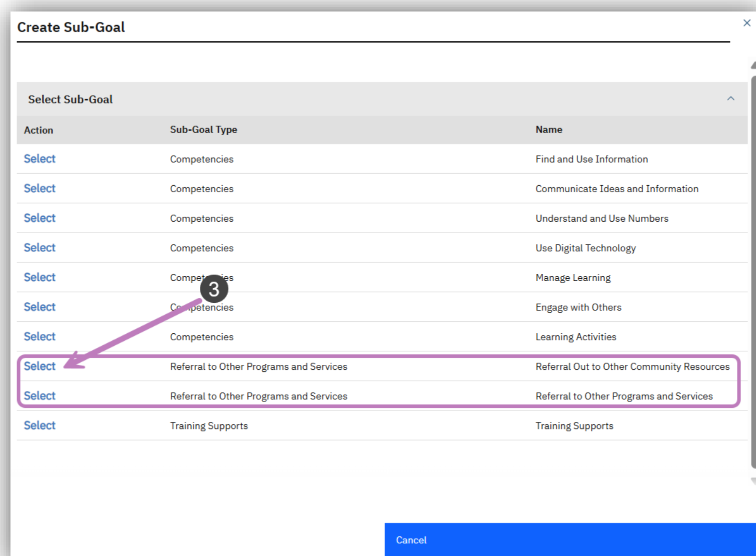
Creating a Referral Sub-Goal

Step 1: Click on the **Plan Content** tab

Step 2: Click on **New Sub-Goal** to add a new Sub-Goal

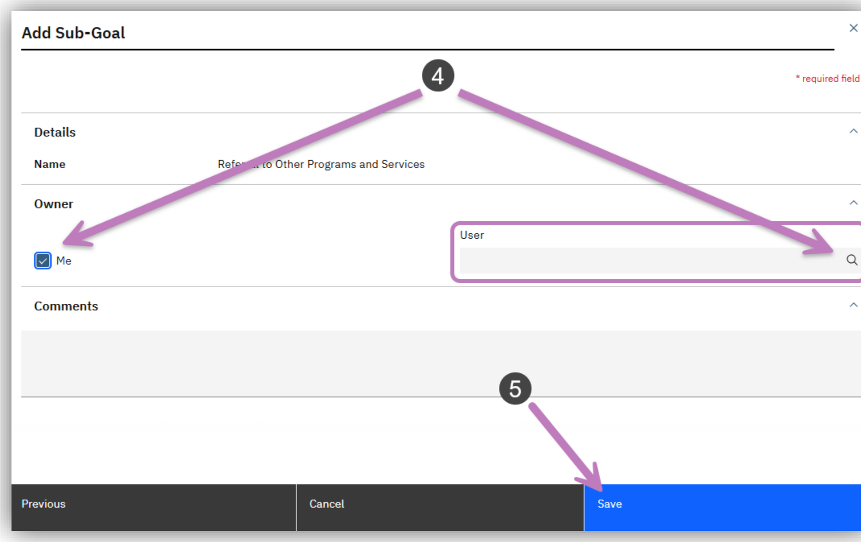


Step 3: Click the **Select** button for **Referral to Other Programs and Services** or **Referral Out to Other Community Resources** and enter the relevant information



Step 4: Click the checkbox 'Me' to assign yourself as the owner or click on the **Search Icon** to select a different registered user from your program staff

Step 5: Click **Save**

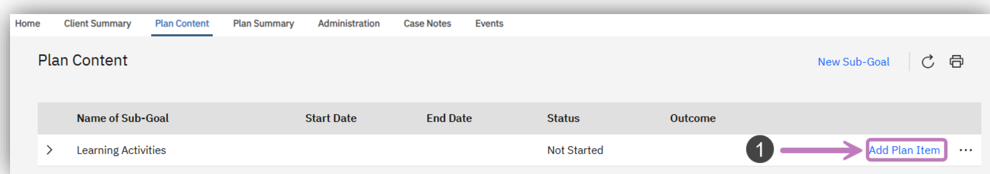


Creating a Referral Plan Item

The Referral Plan Item list will be different depending on what was selected for the Sub-Goal. Both lists are shown in the steps below.

A good practice is to create a list of community agencies that you most often refer to and associate each one with this list of Plan Items.

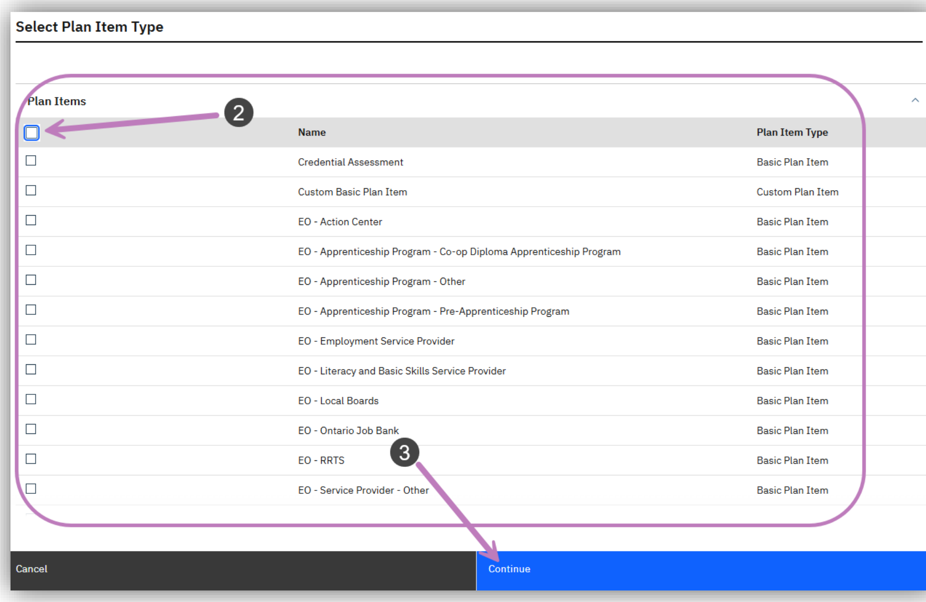
Step 1: Click **Add Plan Item**



For Referral to Other Programs and Services

Step 2: Select the most relevant **Plan Item** from the list

Step 3: Click **Continue** to proceed

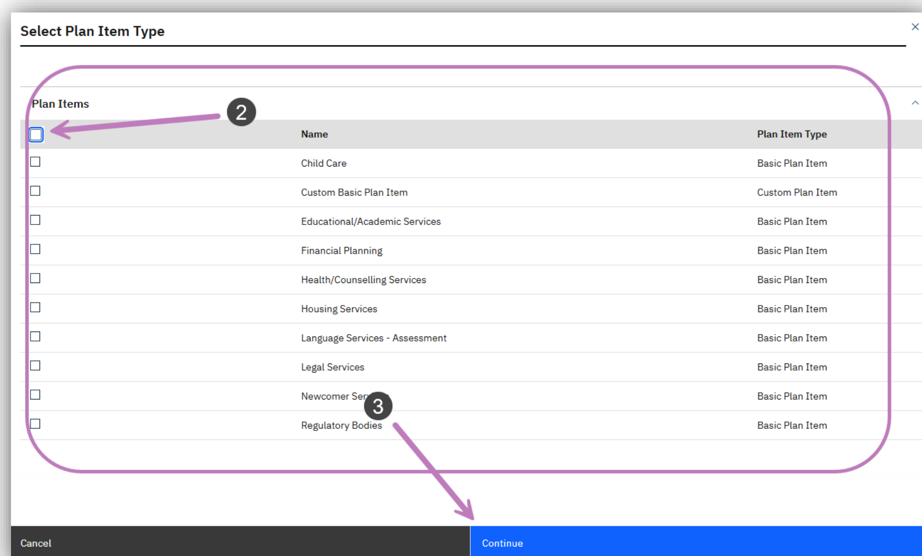


OR

For Referral Out to Other Community Resources

Step 2: Select the relevant **Plan Item Type**

Step 3: Click **Continue** to proceed



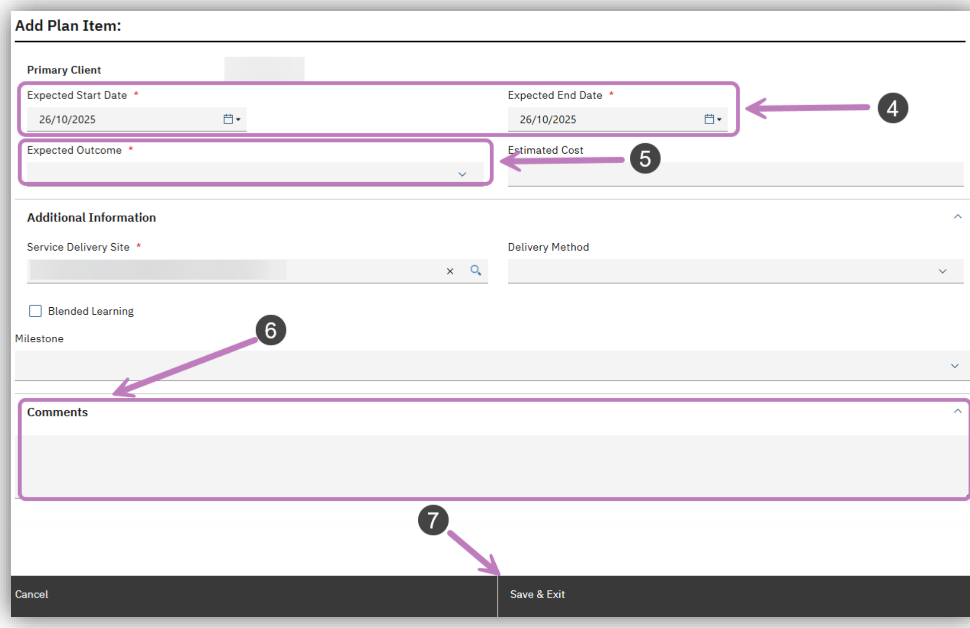
Step 4: Enter the **Expected Start** and **End Dates** using the date the referral occurred or accept the system's default dates if applicable.

Step 5: Select the **Expected Outcome** by Indicating the stage of the learner's program when the referral was made:

- At Entrance
- During Service
- At Exit

Step 6: Add **Referral Details** (optional but good practice) by providing a brief description of the referral, e.g., *Referred to the City Library*

Step 7: Save & Exit



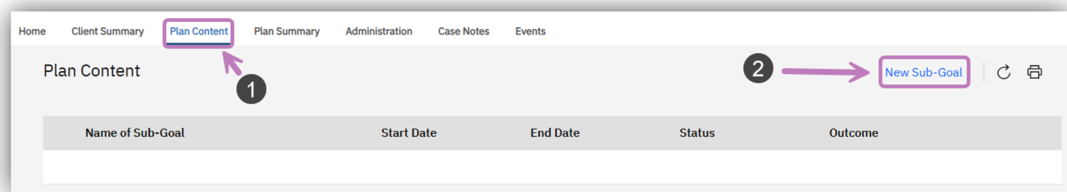
Adding Custom Basic Sub-Goal and Plan Item

The **Custom Basic Sub-Goal** option allows users to create a personalized Plan Item that is not limited by predefined categories. When selected, it unlocks all available drop-down selections, providing flexibility to design a plan item that doesn't fit within the standard options. This is especially useful for tailoring Plan Items to unique learner needs, such as specialized workshops, training sessions, or other custom activities.

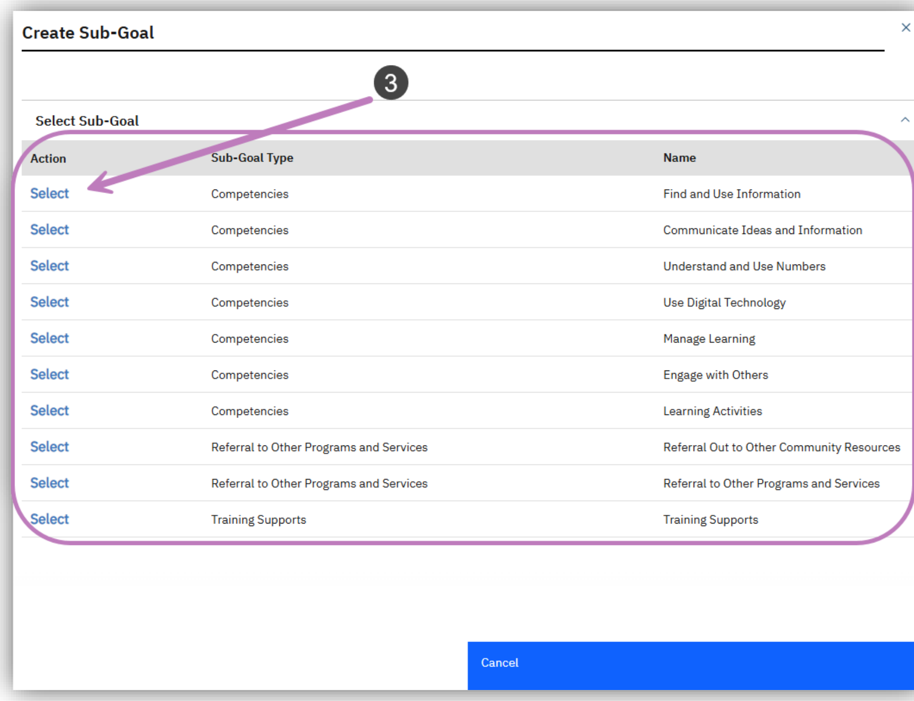
Creating a Custom Basic Sub-Goal

Step 1: Click on the **Plan Content** tab

Step 2: Click on **New Sub-Goal**.

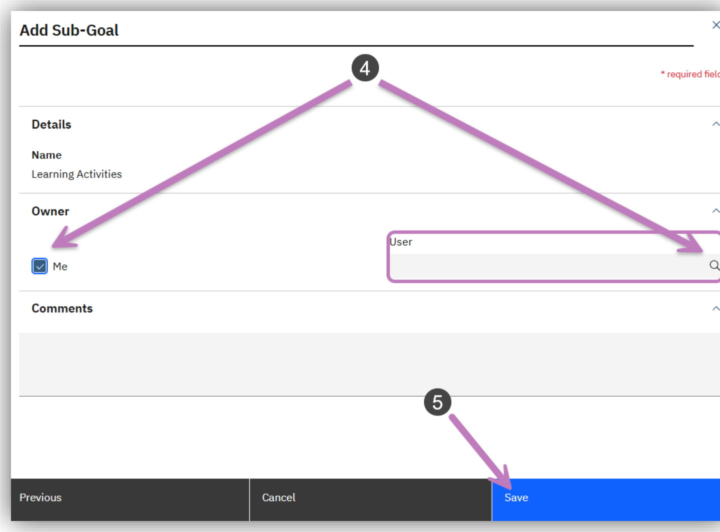


Step 3: Click **Select** on the Sub-Goal that corresponds to the custom Plan Item you wish to create



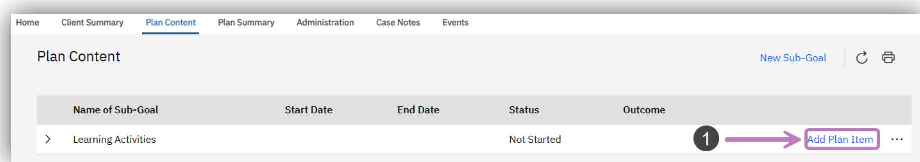
Step 4: Click the checkbox ‘Me’ to assign yourself as the owner or click on the **Search Icon** to select a different registered user from your program staff

Step 5: Click **Save**



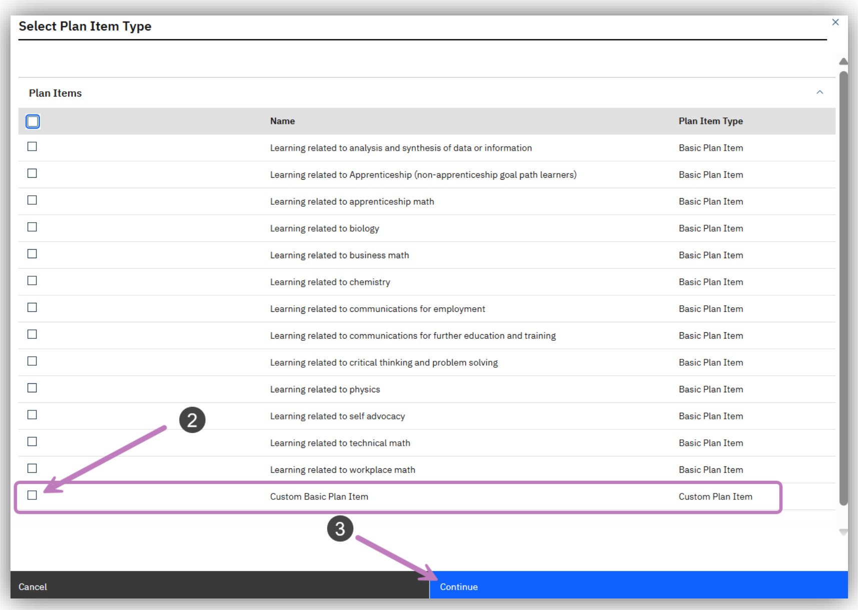
Creating a Custom Basic Plan Item

Step 1: Click **Add Plan Item**



Step 2: Select **Custom Plan Item**

Step 3: Click **Continue**



Step 4: Enter the **Name** of the Plan Item *e.g., workshop, training session, or activity title.*

Step 5: Enter the **Expected Start Date** and **Expected End Date**

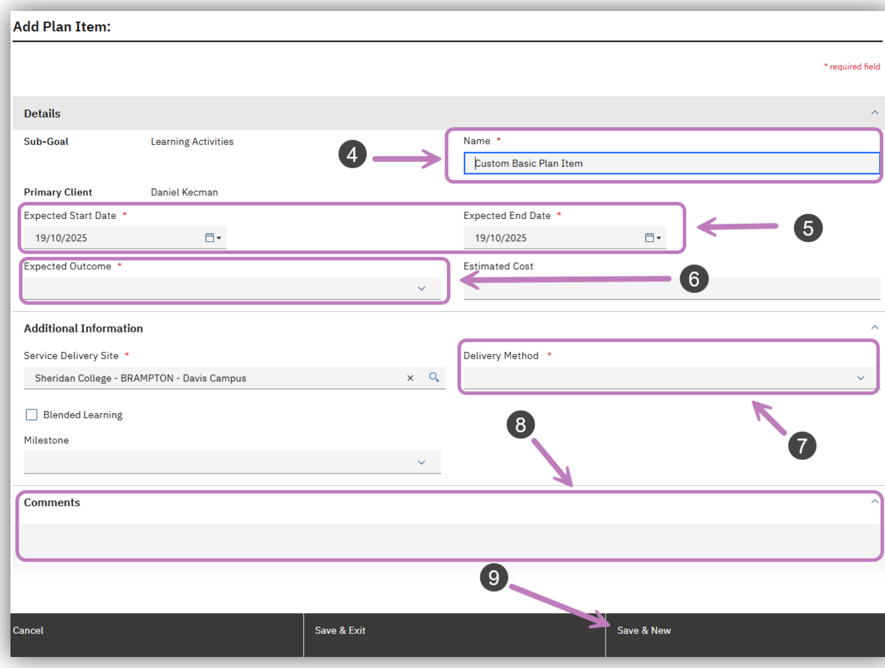
Step 6: Select the **Expected Outcome** from the drop-down list

Step 7: Select the **Delivery Method** from the drop-down menu

Required for Milestones and Learning Activities

Step 8: Enter the **Activity Information** (optional)

Step 9: Click **Save & Exit**



Service Plan Activation

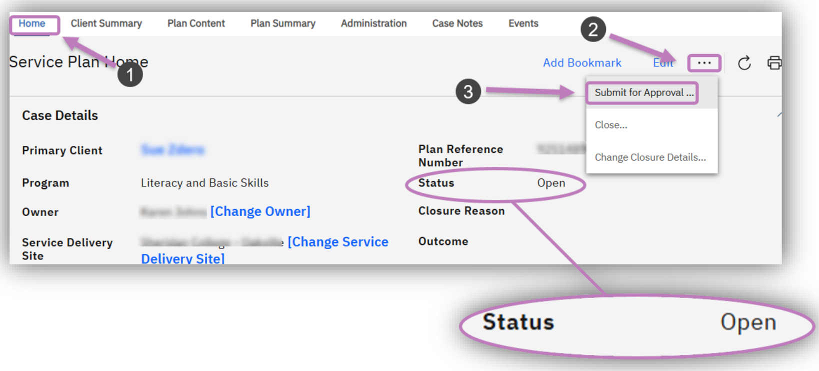
The service plan needs to be **activated** within EOIS-CaMS for the learner to count toward the Ministry's annual "Learners Served" target for your site. The first step is submitting the service plan for "Approval" within the system.

Approving Service Plan

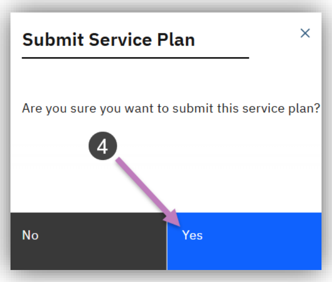
Step 1: Click on the **Home** tab

Step 2: Click the **Action** button

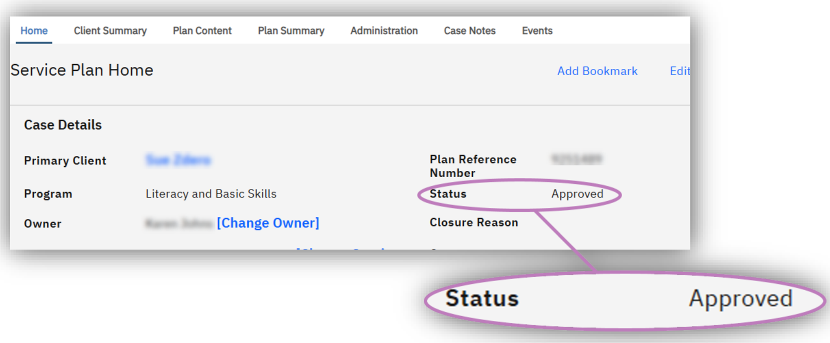
Step 3: Select **Submit for Approval**



Step 4: Click **Yes**



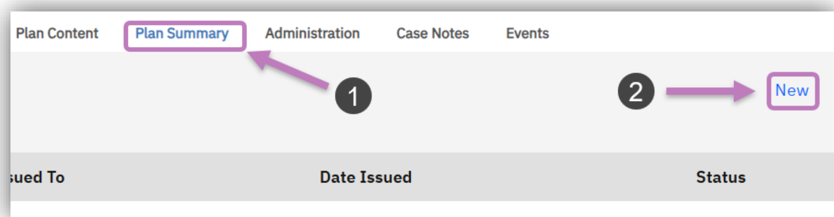
*The Service Plan status will now show as **Approved**. It is ready for activation.*



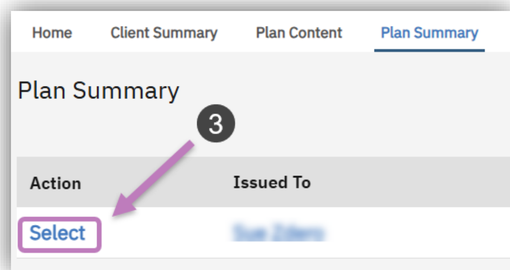
Activating Service Plan

Step 1: Click on the **Plan Summary** tab

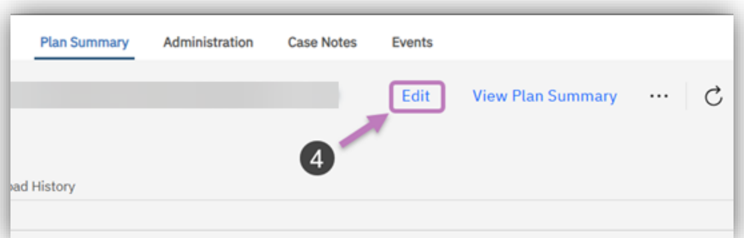
Step 2: Click **New** to create the Plan Summary.



Step 3: Click **Select**

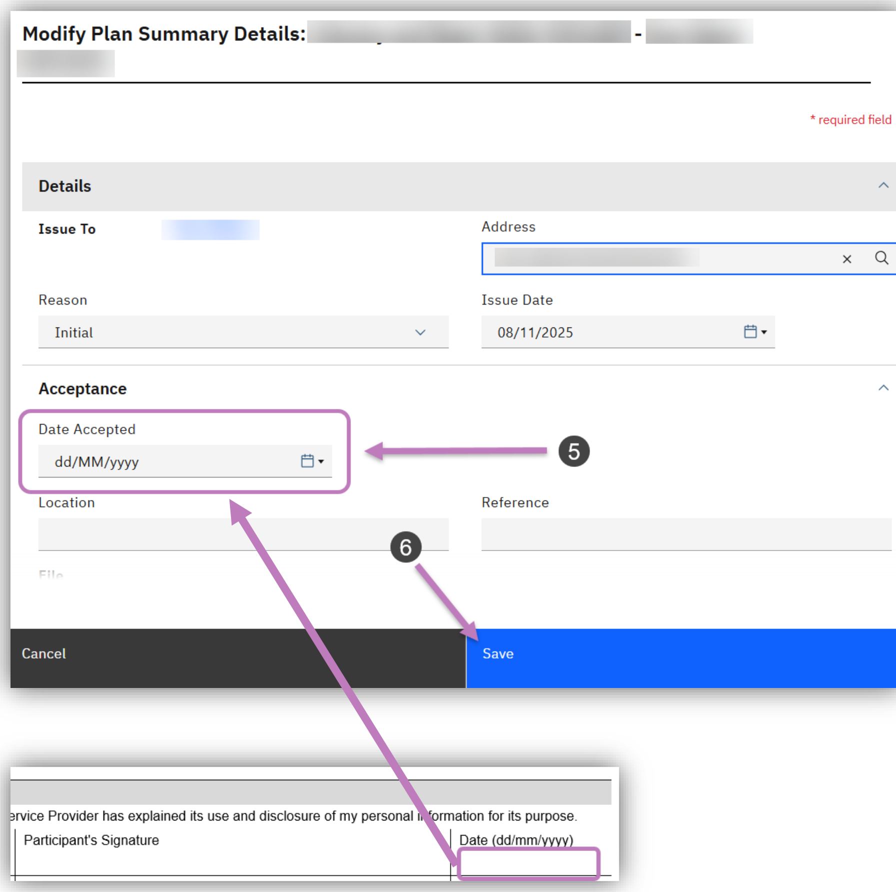


Step 4: Click **Edit**



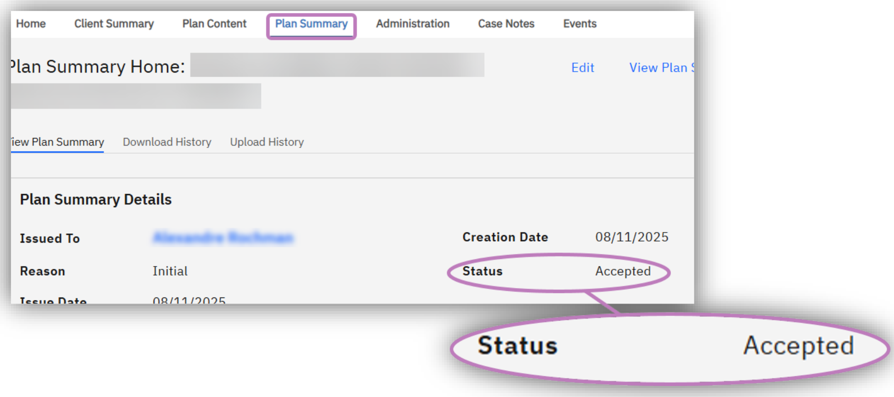
Step 5: Enter the **Date Accepted**

Step 6: Click **Save**.



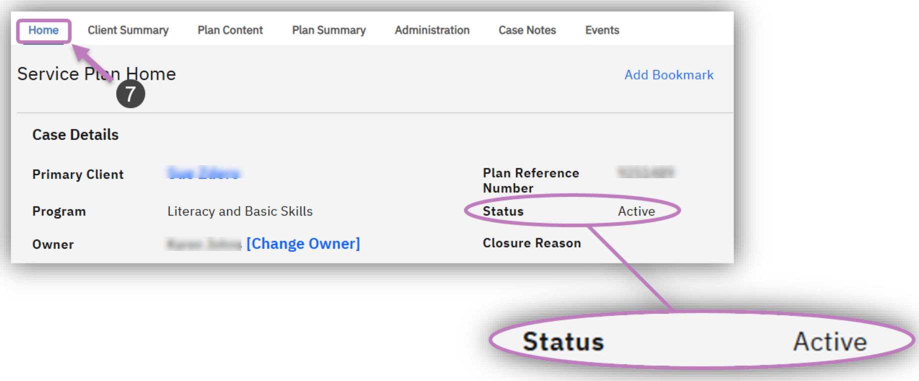
The ***Date Accepted*** *is normally the date that the learner accepts (agrees to/signs) their Learner Plan. While some GET Set programs have learners sign the Participant Registration Form and the Learner Plan on the same day, others may have the learner sign the Learner Plan on a different date. The key requirement is that the* ***Date Accepted*** *in EOIS-CaMS must not be dated earlier than the signed Notice of Collection and Consent in the Participant Registration Form.*

The status of the Plan Summary has now changed to **Accepted.**



Step 7: Click the **Home** tab

The **Service Plan's** status is now **Active.**



The Enhanced Learner Plan

Each learner in the Get SET program must have a Learner Plan (LP) on file. The LP is developed soon after the learner is registered in your program.

Get SET programs have the option of using **either** the Ministry-designed **Enhanced Learner Plan (ELP)** available in EOIS-CaMS or a locally developed LP that includes Ministry-required data. Locally developed LPs often include additional information that the service provider chooses to include.

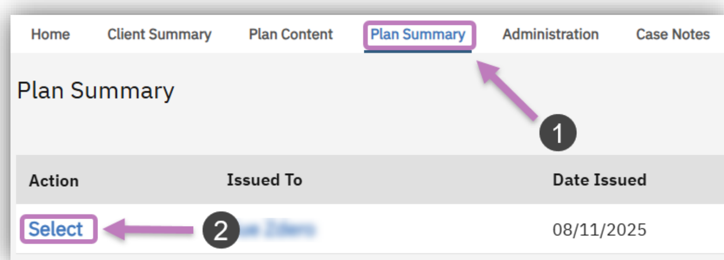
If your program uses the ELP, it will be automatically generated and populated with learner-specific data that is entered into EOIS-CaMS. Updates to the locally developed LP must be entered into the EOIS-CaMS Service Plan on a regular basis. The most common items that must be entered/updated into the EOIS-CaMS Service Plan include milestones, learning activities, referrals, and training supports.

The information in this section describes the use of the ELP.

Downloading the ELP

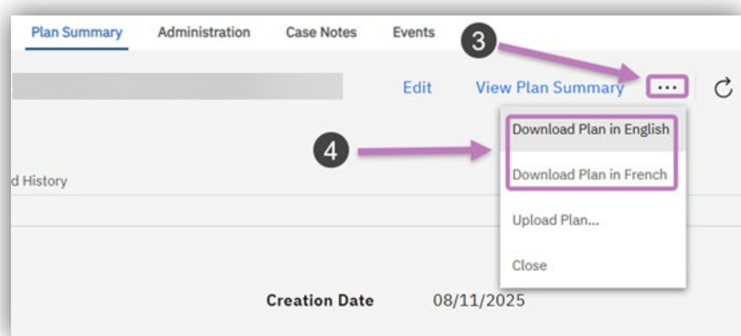
If your Get SET program uses the ELP, it must be downloaded before it can be printed. You can download the ELP once it is in **Approved** status in EOIS-CaMS.

Step 1: Click the **Plan Summary** tab
Step 2: Click **Select**



Step 3: Click the **Action Button**

Step 4: Select **Download Plan in English (or French),** as appropriate for your program



Saving the ELP

Once the plan is downloaded, you can open and save it as a .pdf file. If you see the message to the right, you may need to update the version of Adobe Reader on your computer.

> The document you are trying to load requires Adobe Reader 8 or higher. You may not have the Adobe Reader installed or your viewing environment may not be properly configured to use Adobe Reader.
>
> For information on how to install Adobe Reader and configure your viewing environment please see http://www.adobe.com/go/pdf_forms_configure.

Once the ELP is downloaded in a .pdf format, it can be printed for the learner to sign. Once signed, the ***Accepted*** *date is entered on the ELP and uploaded. The status of the ELP changes from* ***Approved*** *to* ***Active*** *(visible in the top right corner of the ELP).*

Uploading the ELP

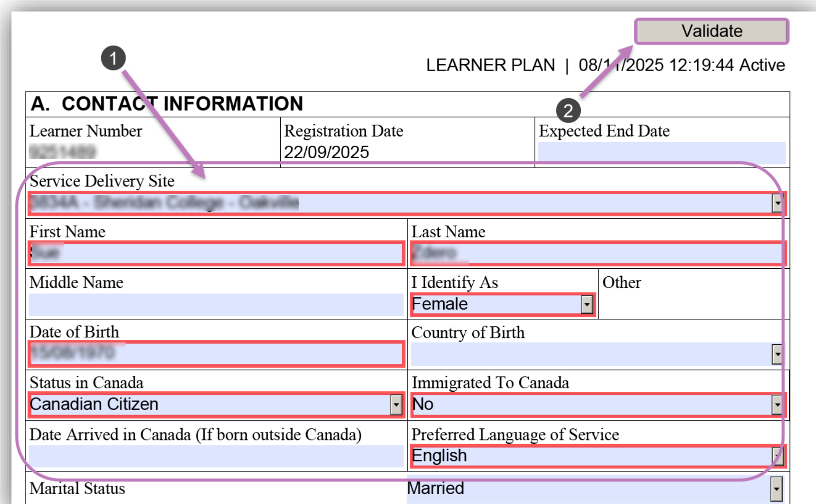
When you open the **Enhanced Learner Plan (ELP)** .pdf file, you will notice drop-down lists, text boxes, and date fields that allow you to make changes and updates to the plan. Once updated, the **ELP** can be uploaded to EOIS CaMS to reflect the changes.

The ***ELP*** *.pdf is sensitive due to embedded JavaScript that ensures all mandatory fields are completed. If the document does not validate properly, you may need to close and reopen it.*

Make Changes and/or Updates to the ELP

Step 1: Use the **drop-down** arrows to add or update personal information, sub-goals and plan items, learning style, etc.

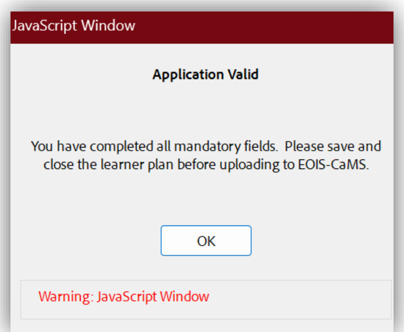
Step 2: Click **Validate**
Note: this triggers a JavaScript check to confirm that all required fields are completed.



*When you SAVE the ELP, it displays the **Application Valid** pop-up window. If the mandatory sections are not completed before saving, you will receive an error message.*

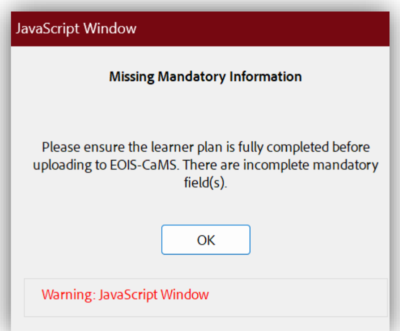
No Missing Information

The validation confirms that all mandatory fields are filled in.

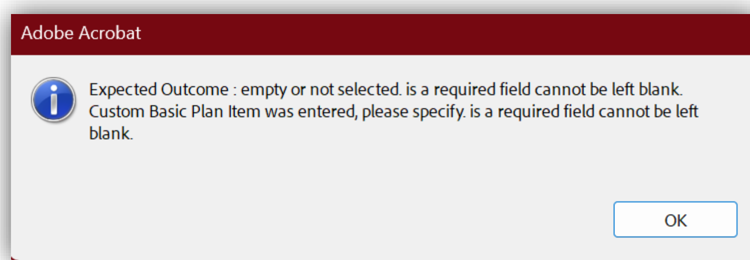


Missing Information

The first message will indicate that mandatory information is missing.



The second message will specify which fields need to be completed.

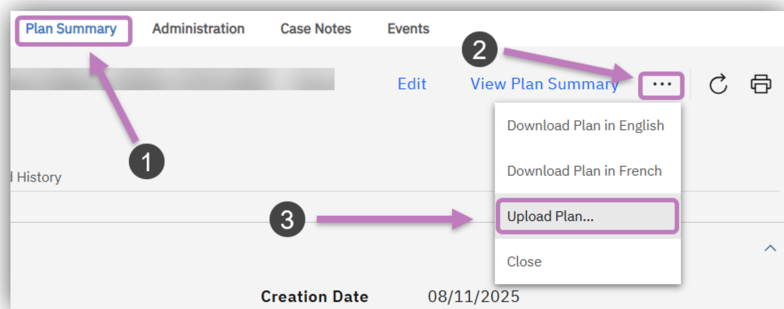


Uploading the New ELP to EOIS-CaMS

Step 1: Click the **Plan Summary** tab and then click **Select**

Step 2: Click on the **Action Button**

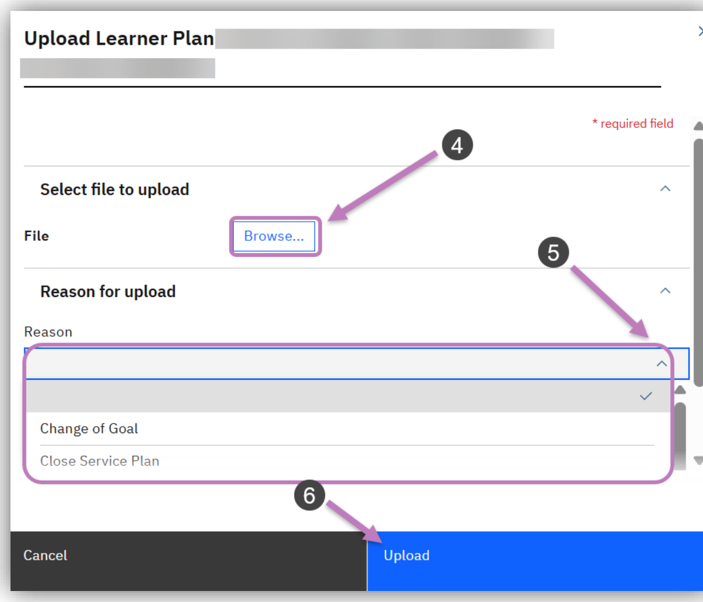
Step 3: Click **Upload Plan**



Step 4: Click **Browse** to locate and select your saved **ELP** .pdf file

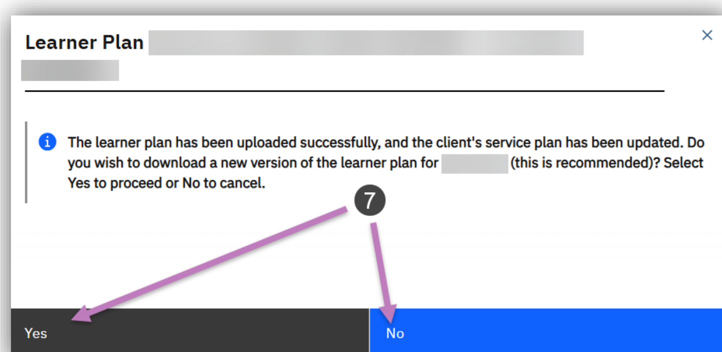
Step 5: Select **Reason** from the drop-down menu

Step 6: Click **Upload**

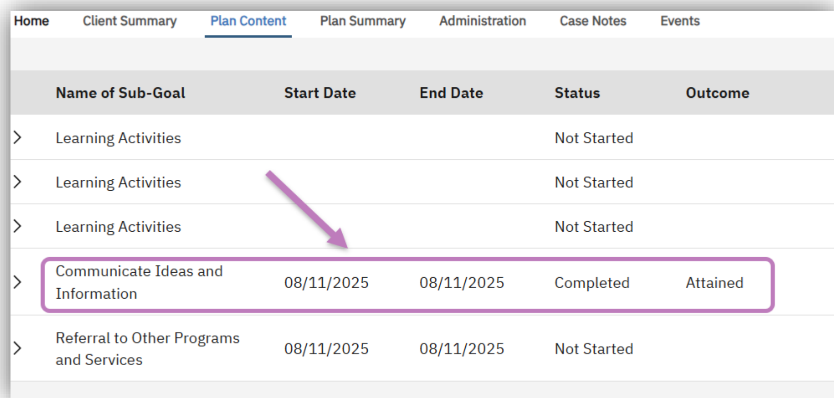


Step 7: Choose one of the following options:

- Click **Yes** to download a new version of the ELP.
- Click **No** to close the dialog box.



Once uploaded, any changes made in the ELP will now be reflected in EOIS-CaMS when you view the relevant tabs.



Modifying and Attaining Sub-Goals and Plan Items

Throughout the Get SET program, you will add, modify and close Sub-Goals and Plan Items within your learners' EOIS-CaMS Service Plans, and on the Learner Plan that you have on file. It is critical that the information you enter in the EOIS-CaMS Service Plan matches the information in the Learner Plan.

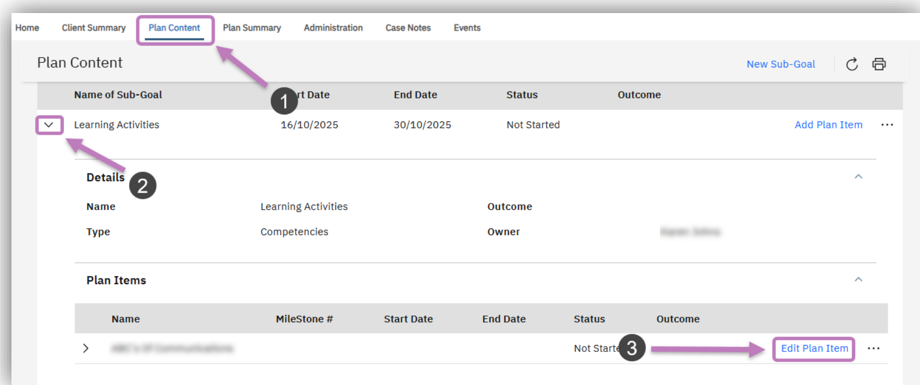
As mentioned, previously in Uploading the ELP, modifications and updates can also be made to the **Enhanced Learner Plan (ELP)** PDF and uploaded.

Modifying and Attaining a Plan Item

Step 1: Click the **Plan Content** tab

Step 2: Click the **Arrow** to expand

Step 3: Click on **Edit Plan Item**



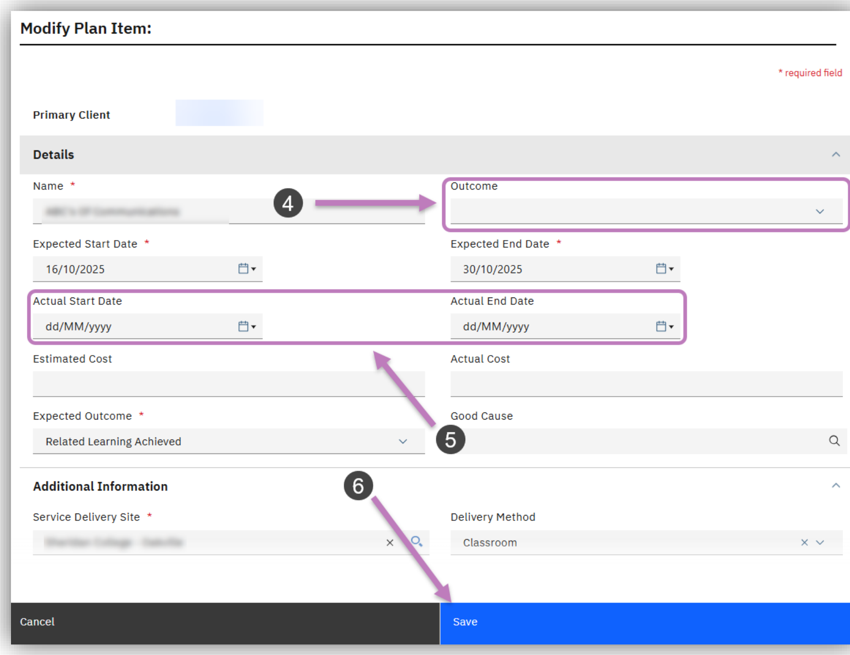
Step 4: Select **Attained, Not Attained** or **Cancelled** from the drop-down menu

These options vary depending on the Plan Item type:
• Learning Activity and Milestones is "Attained" or "Not Attained"
• Referral is "Attained" or "Not Attained" (followed through or not)
• Training Support is "Attained" only (granted))

Step 5: Enter the **Actual Start Date** and **Actual End Date**

These dates indicate when the learner actually began and completed the Plan Item.

Step 6: Click **Save**

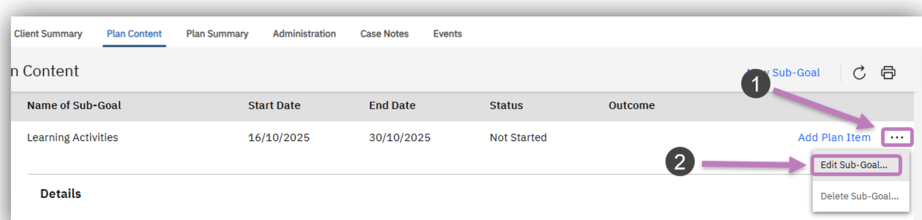


Completing a Sub-Goal

Before you can complete the Sub-Goal, all the Plan Items within the Sub-Goal must have a status of Completed or Cancelled.

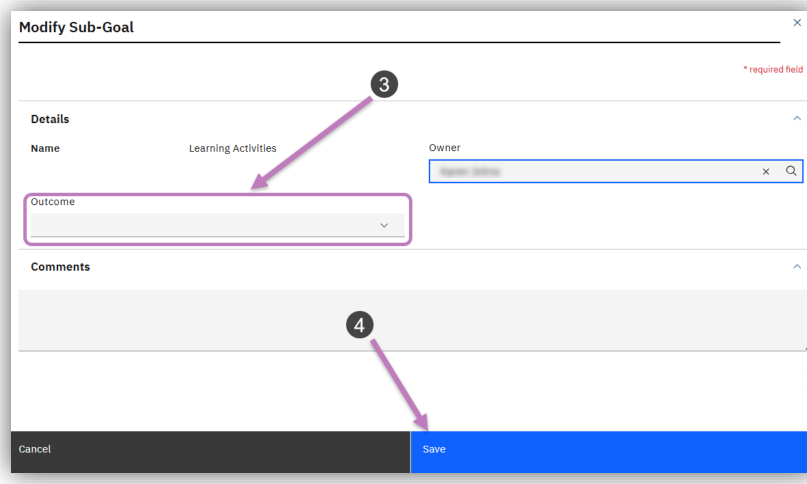
Step 1: Click the **Action** button

Step 2: Click **Edit Sub-Goal**

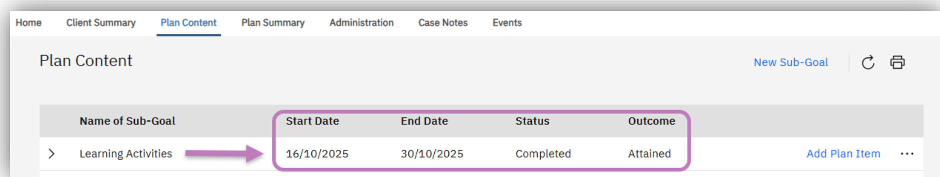


Step 3: Select **Attained** or **Not Attained** from the drop-down list

Step 4: Click **Save**



The Sub-Goal will now show that it is **Completed** and **Attained.**



Deleting or Cancelling Sub-Goals and Plan Items

There are times when a **Sub-Goal** and/or **Plan Item** will need to be **deleted or cancelled**. This could happen if:

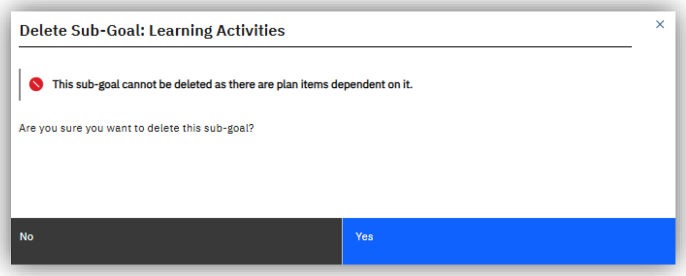
- the learner never started the Plan Item activity
- the Plan Item was entered by mistake

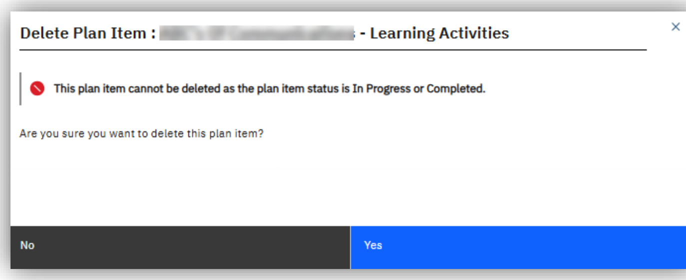
Each Get SET program may have different processes and rules for deleting or cancelling a Sub-Goal or Plan Item. Always follow your program's guidelines.

Deleting a Sub-Goal and/or Plan Item

The system **will not allow** a Sub-Goal or Plan Item to be deleted if the status of the Plan Item is **"Started"** or **"Attained"**.

You will receive the following warnings:





If the Plan Item's status is **"Not started"**, it can be deleted.

To delete a Plan Item, you essentially reverse the steps you used to add it. The instructions below explain how to remove a fully completed Sub-Goal and Plan Item. You can use any of these steps depending on how far along you are in the process.

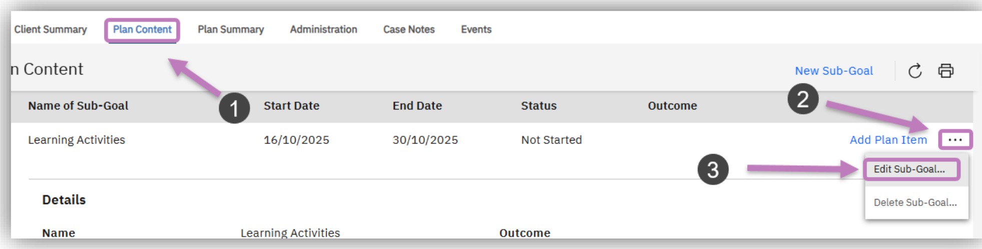
Removing the Sub-Goal Outcome

You must remove the Sub-Goal Outcome **before** removing the Plan Item information.

Step 1: Click the **Plan Content** tab

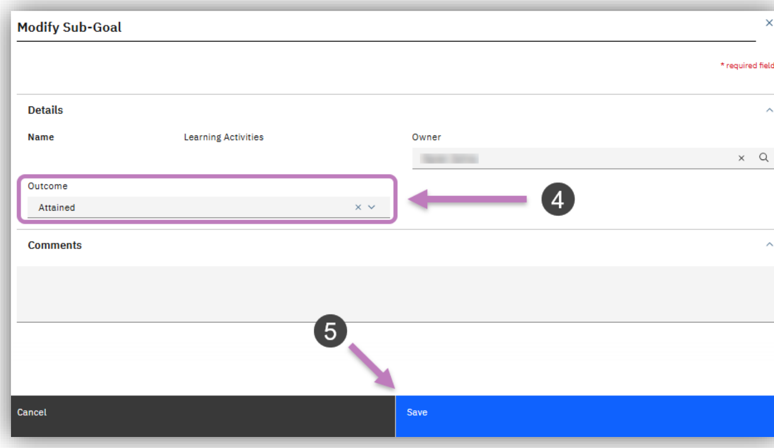
Step 2: Click the **Action** button

Step 3: Click on **Edit Sub-Goal**



Step 4: Click the **drop-down** and select the **blank** option

Step 5: Click **Save**

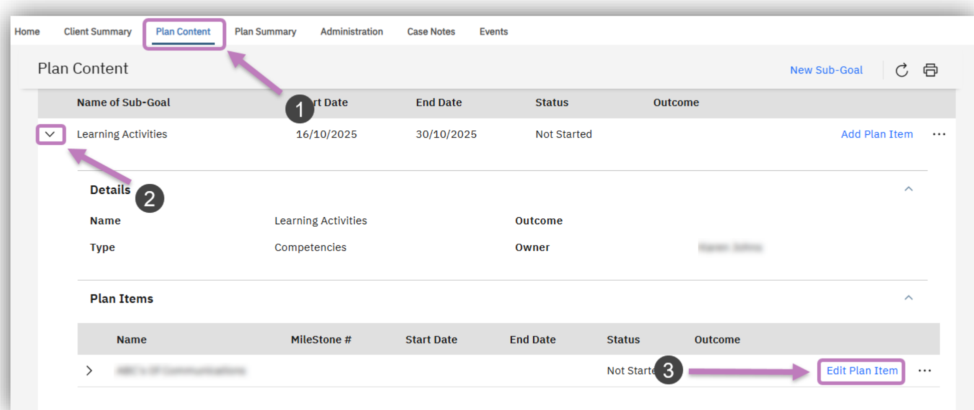


Removing the Plan Item Outcome and Actual Dates

Step 1: Click the **Plan Content** tab

Step 2: Click the **Arrow** to expand

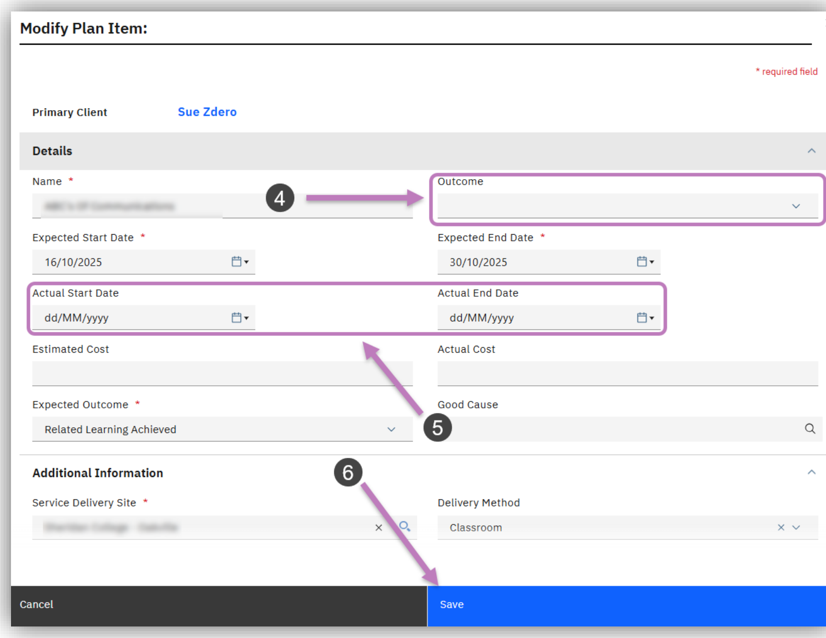
Step 3: Click on **Edit Plan Item**



Step 4: Click the **drop-down** and select the **blank** option

Step 5: Delete the **Actual Start Date** and **Actual End Date**

Step 6: Click **Save**



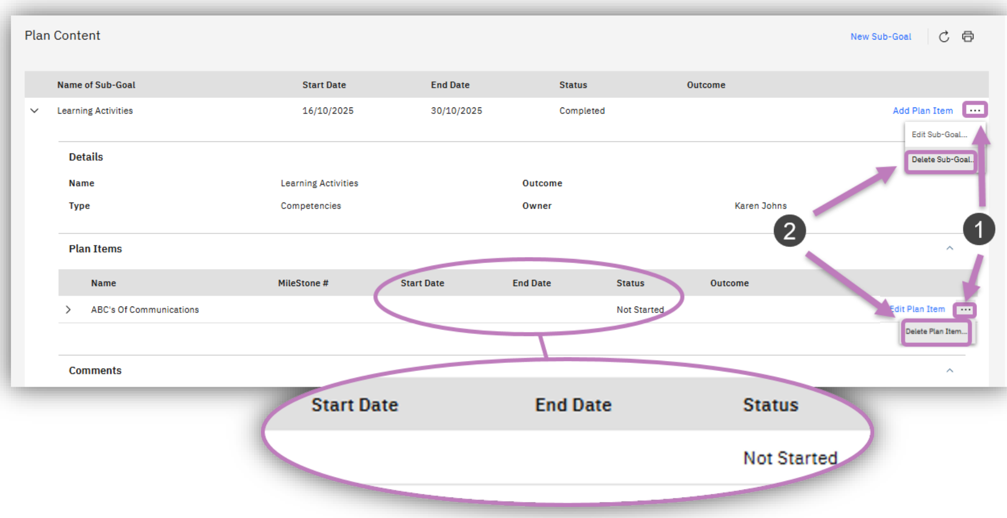
Deleting a Sub-Goal or Plan Item

Once the Actual Start and End Dates are removed and the status shows **Not Started**, you can delete the Sub-Goal or Plan Item.

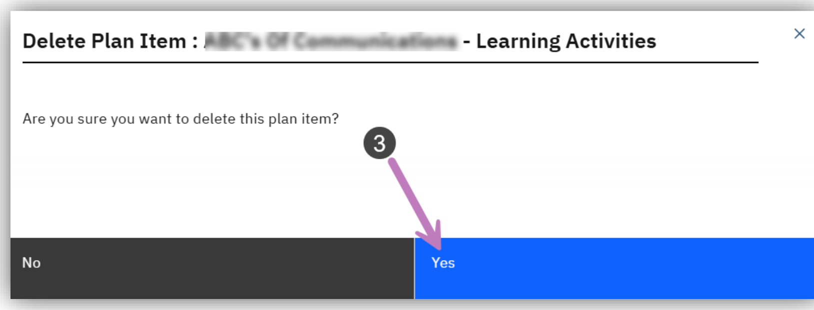
Step 1: Click one of the **Action** buttons

Step 2: Click on **Delete Sub-Goal** or **Delete Plan Item**

Choose based on what you need to remove. If you plan to replace the Plan Item with another, only delete the Plan Item and then add the new one.



Step 3: Click **Yes**



Cancelling a Sub-Goal and/or Plan Item

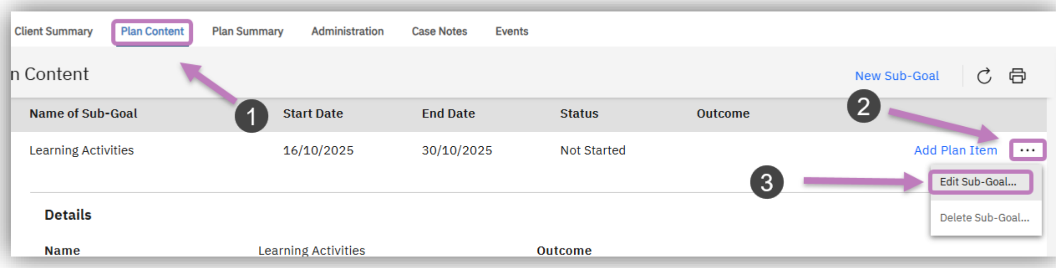
Cancelling is typically used when a learner started an activity but did not complete it, or when the activity needs to be marked as cancelled rather than deleted.

Cancelling the Sub-Goal

Step 1: Click the **Plan Content** tab

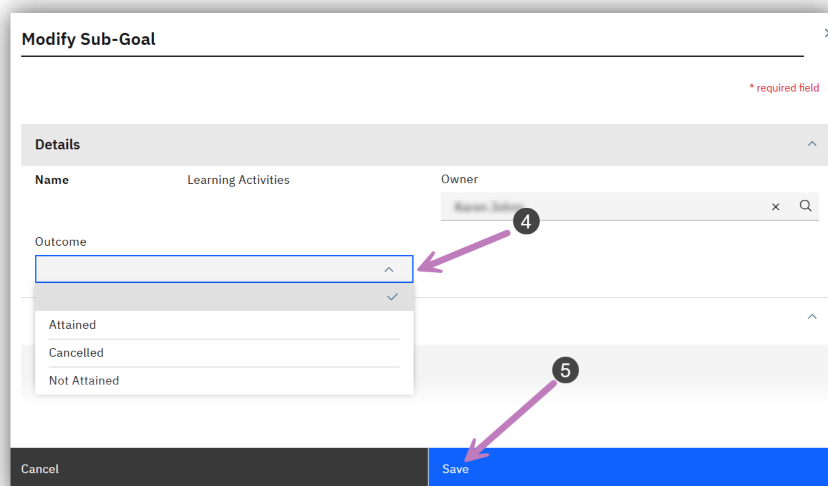
Step 2: Click the **Action** button

Step 3: Click on **Edit Sub-Goal**



Step 4: Click the drop-down and select **Cancelled**

Step 5: Click **Save**

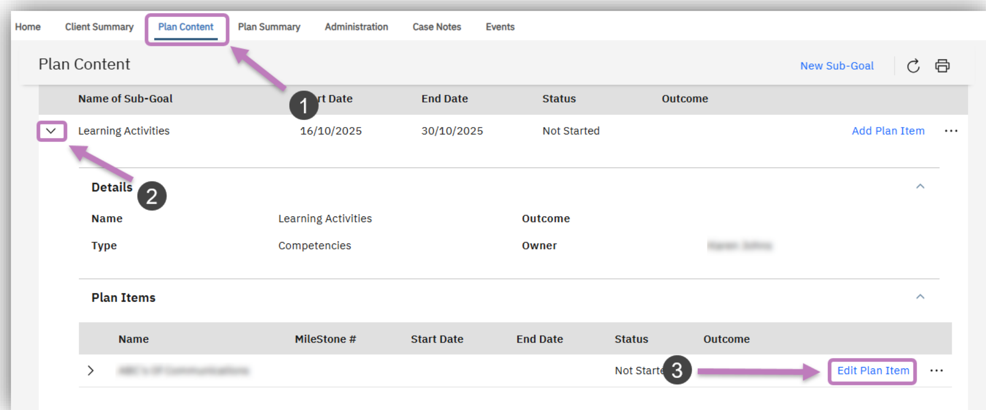


Cancelling the Plan Item

Step 1: Click the **Plan Content** tab

Step 2: Click the **Arrow** to expand

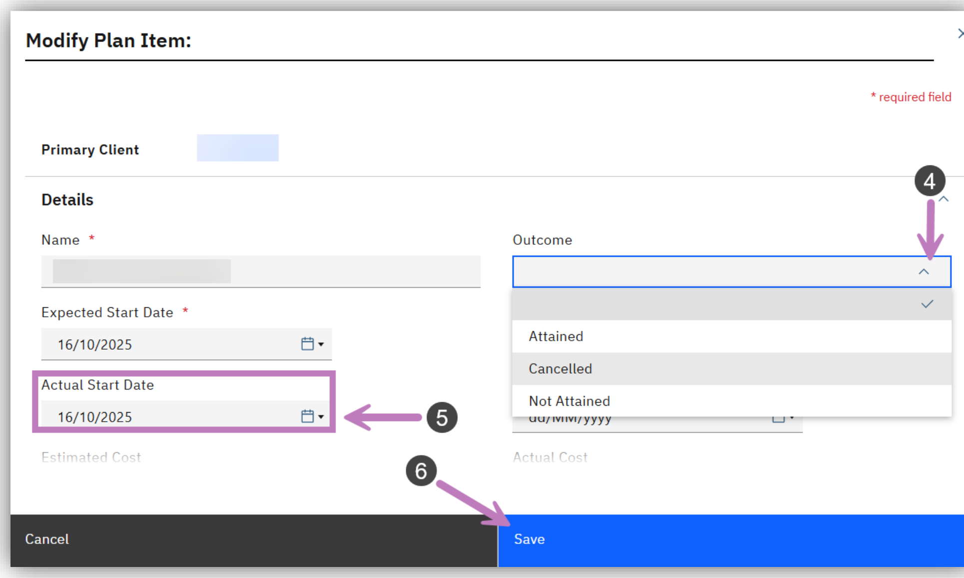
Step 3: Click on **Edit Plan Item**



Step 4: Click the drop-down and select **Cancelled**

Step 5: Remove the **Actual Start Date**

Step 6: Click **Save**



*After saving, the status of the **Plan Item** will change to **Not Started** with a **Cancelled** outcome.*

Closing the Service Plan

A learner's Service Plan must be closed when they leave your program. This is a critical step because once the file is closed, it **cannot be reopened or edited**. Before closure, ensure that all information in the learner's file is complete and accurate.

File Closure Checklist

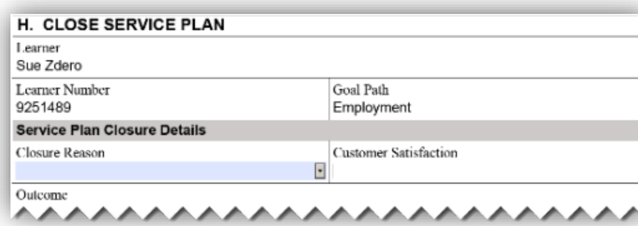
It is best practice to use a checklist before closing the Service Plan in EOIS-CaMS. Your program may already have one, or you can create your own. Example items on the checklist include:

- Confirm all reported changes to learner information and plan details are updated in CaMS (address, phone number, email, goals, education, employment, dates, etc.).
- Ensure all sub-goals are marked as **attained, not attained, cancelled, or deleted**.
- Verify all required documents are present in the learner's file.

Checklist for Closing Files

- [ ] Signed Participant Registration Form
- [ ] Intake and Ongoing Assessment Documentation
- [ ] Learning Style Assessment
- [ ] Release of Information Form
- [ ] Case Notes
- [ ] Copies of Correspondence
- [ ] Signed and up to date Learner Plan
- [ ] Student Agreements (attendance/progress)
- [ ] Service Coordination Referred In/Out Documentation
- [ ] Completed Milestones and Learning Activities
- [ ] Participant Exit and Follow-Up Forms
- [ ] Copy of the Learner Satisfaction Survey
- [ ] Training Support Documentation

For sites using the **Enhanced Learner Plan (ELP),** complete the closure section (**Section H**) in the ELP .pdf, and upload it to EOIS-CaMS.
See Uploading the ELP

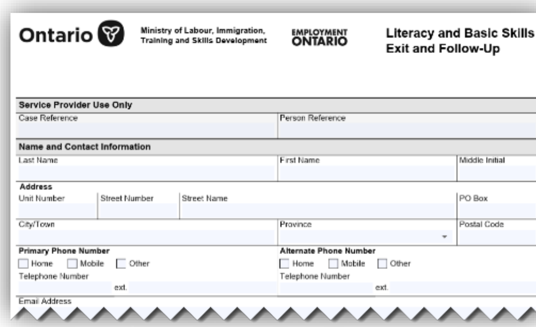


H. CLOSE SERVICE PLAN

Learner Sue Zdero	
Learner Number 9251489	Goal Path Employment
Service Plan Closure Details	
Closure Reason	Customer Satisfaction
Outcome	

Closing the Service Plan in EOIS-CaMS

Before closing the Service Plan, the **Exit and Follow-Up Form** must be completed with the learner. This form is available on the EOPG website under Forms.



Ontario
Ministry of Labour, Immigration, Training and Skills Development
EMPLOYMENT ONTARIO
Literacy and Basic Skills Exit and Follow-Up

Service Provider Use Only
Case Reference | Person Reference

Name and Contact Information
Last Name | First Name | Middle Initial

Address
Unit Number | Street Number | Street Name | PO Box
City/Town | Province | Postal Code

Primary Phone Number ☐ Home ☐ Mobile ☐ Other
Telephone Number | ext.

Alternate Phone Number ☐ Home ☐ Mobile ☐ Other
Telephone Number | ext.

Email Address

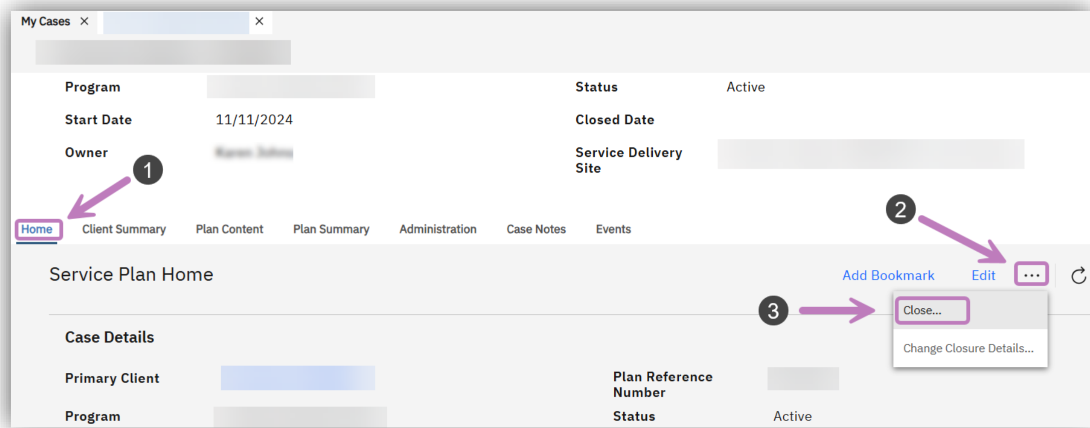
If your program uses the Enhanced Learner Plan and you require a copy before closing the file, this is the time to print or download it. A final copy should then be completed at closure.

Completing the Closure

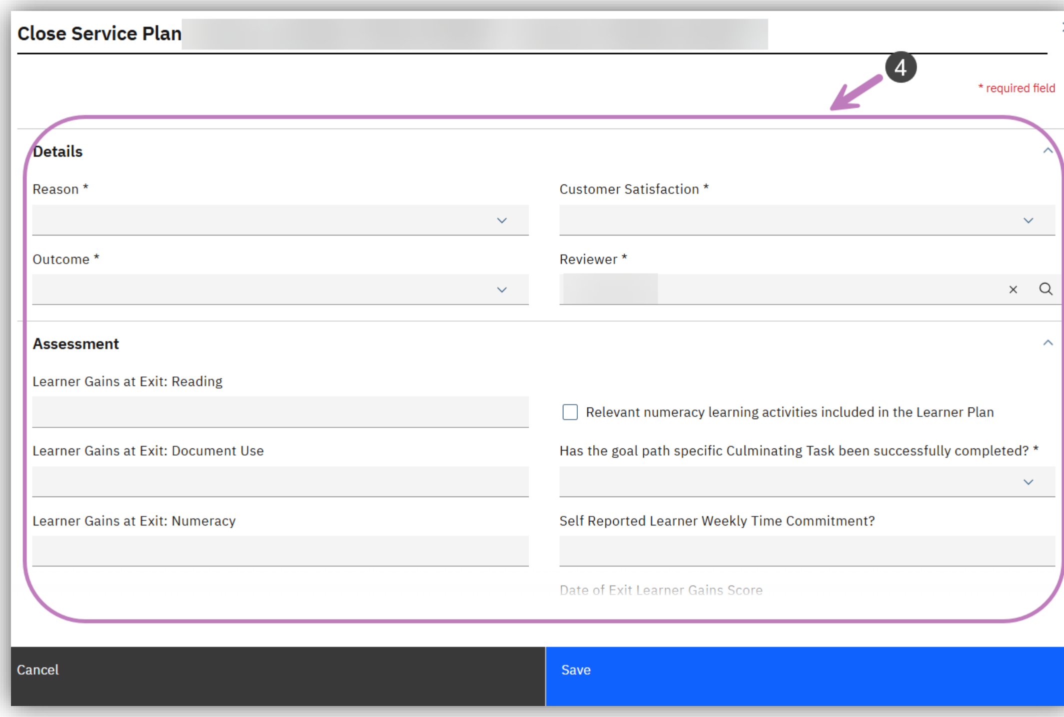
Step 1: Click the **Home** tab

Step 2: Click the **Action** button

Step 3: Click on **Close**

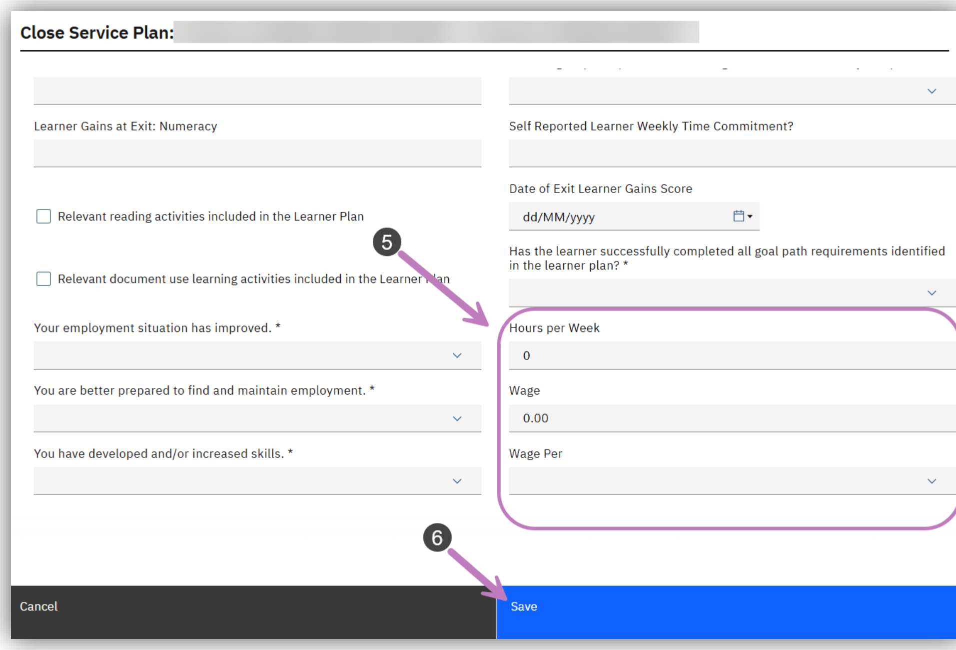


Step 4: Enter all required fields

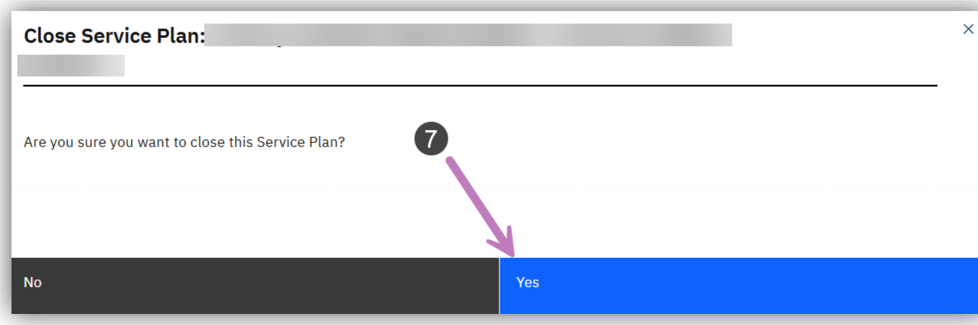


Step 5: Enter the employment section if employment is selected as the outcome. Only the Wage and Wage per are mandatory. If the learner did not disclose their wage, enter **1.00** in the Wage field.

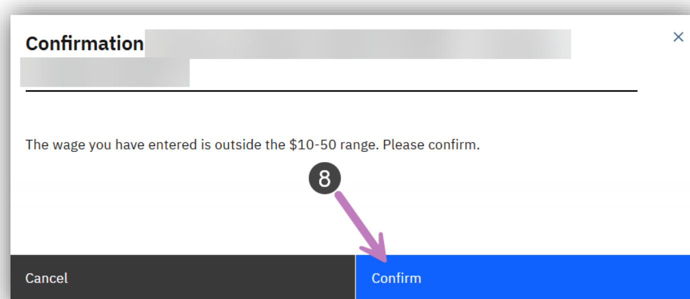
Step 6: Click **Save**



Step 7: Click **Yes** to confirm closure



Step 8: Click **Confirm** to confirm the wage range amount (Reminder: wage entered is less than $10).

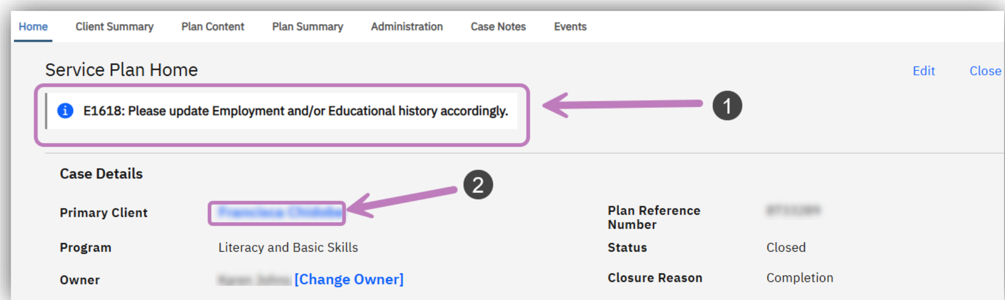


Updating the Background

After closure, update the learner's **Education** and **Employment** details based on the Exit and Follow-Up Form.

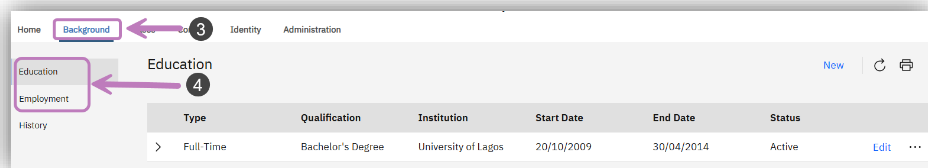
Step 1: A reminder will appear to update Education and Employment

Step 2: Click the **Primary Client** link



Step 3: Click the **Background** tab

Step 4: Update **Education** and/or **Employment** information



See [Create or Update the Background Information] for more details on updating the background.

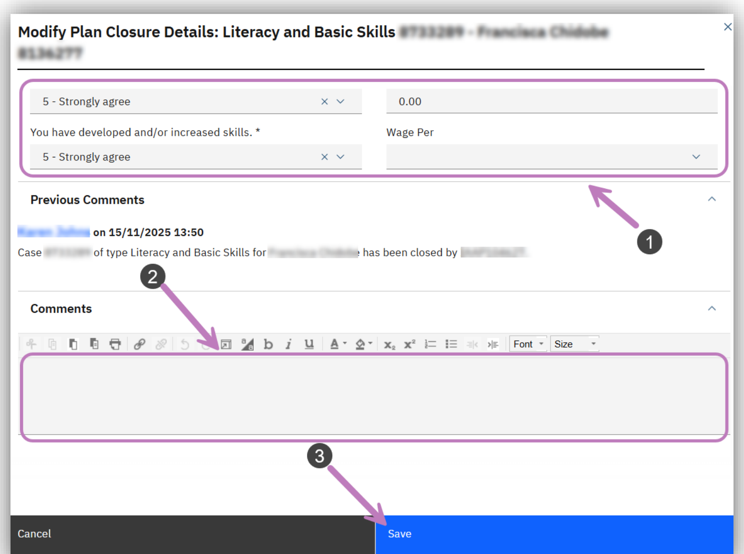
Changing Closure Details

Changes to closure details or additional comments **can** be made after closing the file in EOIS-CaMS.

Step 1: Edit closure information as needed

Step 2: Enter additional comments about the learner or closure

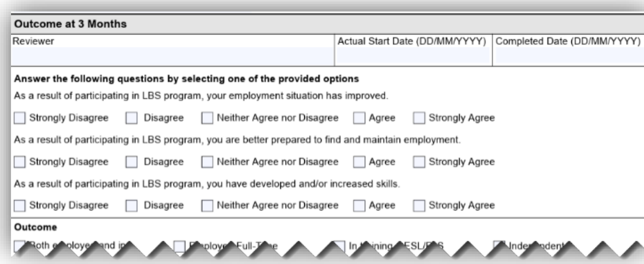
Step 3: Click **Save**



Follow-Up Events, 3, 6 & 12 Months

Each Get SET site is required to follow up with the learner at **3, 6, and 12 months** after they leave the program. All information collected on the **Exit and Follow-Up Form** must be entered into EOIS-CaMS.

When a Service Plan is closed, the system automatically creates a **3-month "review". (**The follow-up is referred to as a "review" in EOIS-CaMS.) After the 3-month follow-up ("review") is completed, the **6-month review** is generated, followed by the **12-month review.**



Typically, three attempts are made to contact the learner, and outcomes are recorded. Your program will have a process in place for how learners are contacted.

- The **first attempt date** is considered the actual start date.
- The **last attempt date** is considered the completion date for each follow-up type.

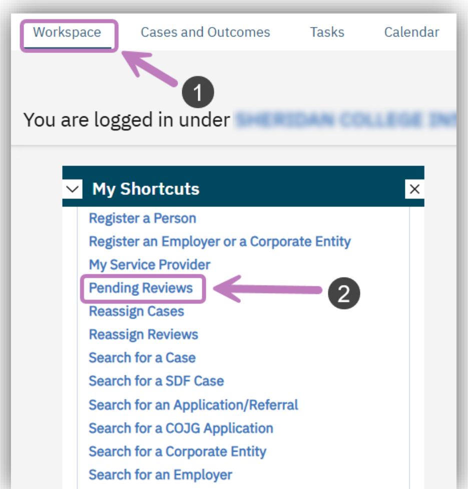
A useful report for managing follow-ups is **Service Provider Follow-Up Cases (Service Plan) #19-A**, which displays follow-up reviews that are overdue or due within the next 30 days. It is available on the EOIS-CaMS Reporting site.

Pulling up the Pending Reviews List

EOIS-CaMS provides a list of reviews (follow-ups) that need to be completed.

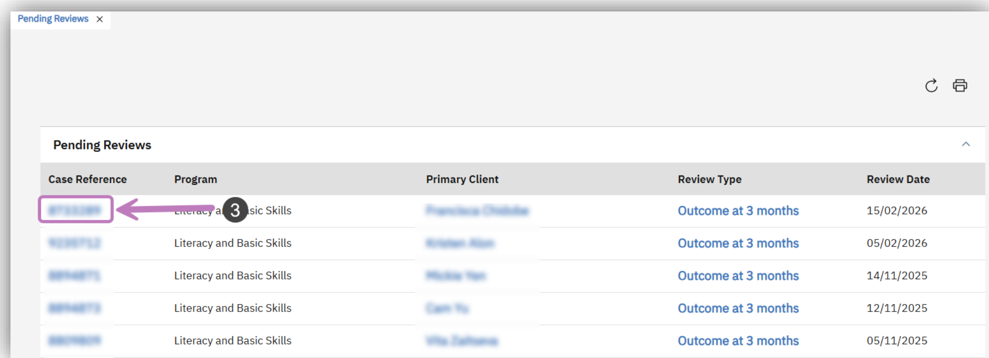
Step 1: Click the **Workspace** tab

Step 2: Click **Pending Reviews**



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

Step 3: Click on the **Service Plan Number**



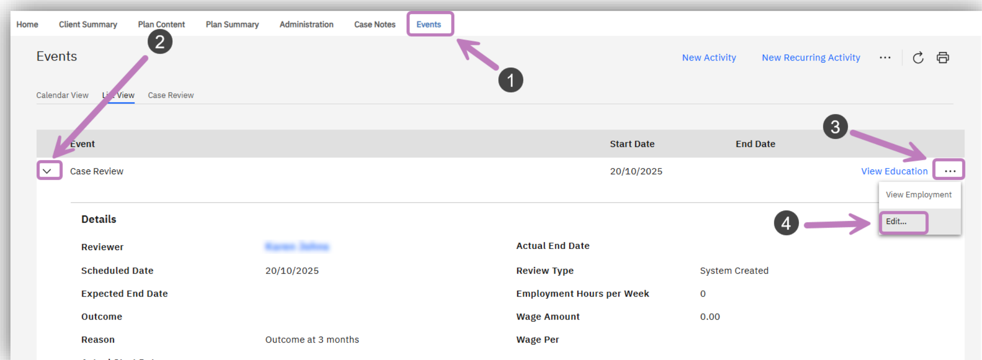
Completing the Follow-Up

Step 1: Click on the **Events** tab

Step 2: Click the arrow to expand the event information

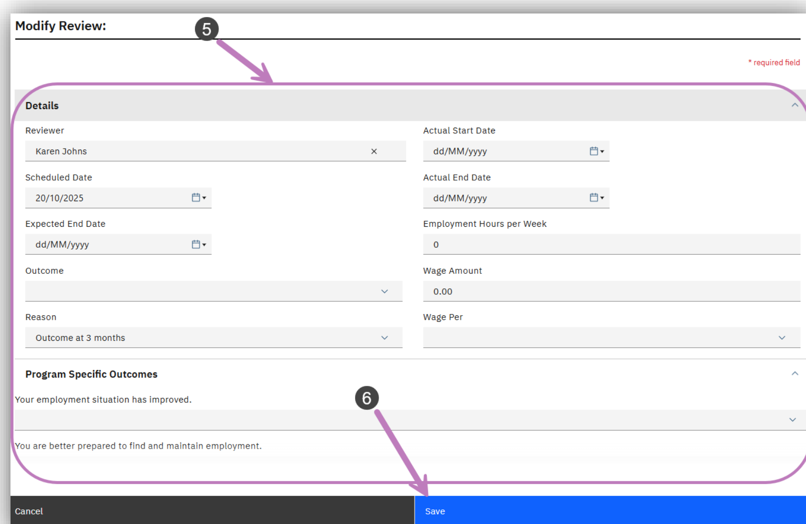
Step 3: Click the **Action** button

Step 4: Click **Edit**



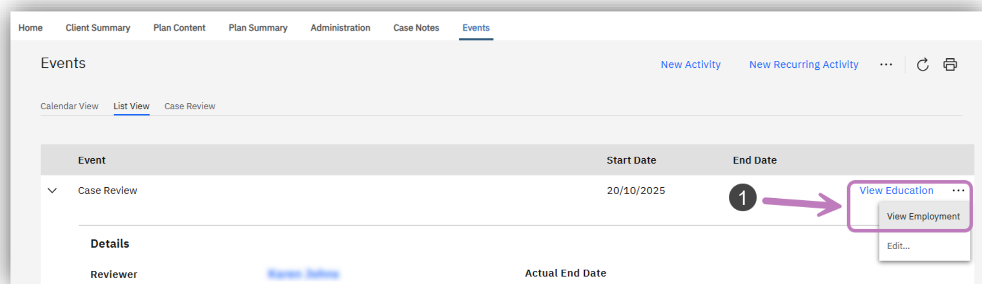
Step 5: Enter the information on the follow-up form

Step 6: Click **Save**



Updating the Background

Step 1: Click on **View Education** or **View Employment** to update the background, if needed



See [Create or Update the Background Information]() for more information on updating the background.

Request an Appointment with a Service Provider (RASP)

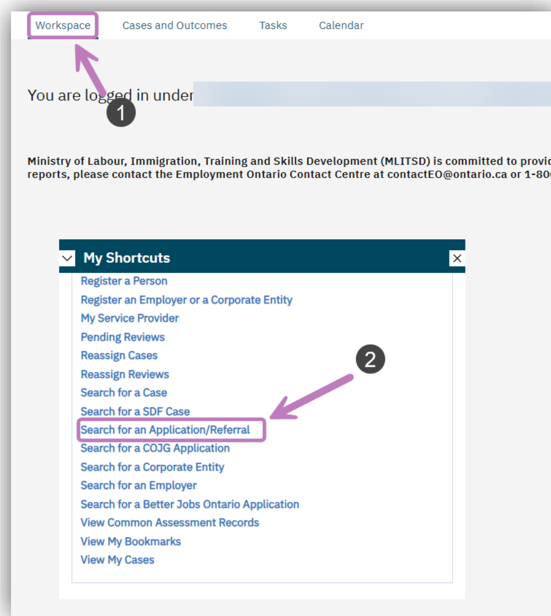
A RASP application refers to a request made through the online **RASP** tool. It is located on the Ministry's public-facing Employment Ontario website. The RASP tool helps clients connect with Employment Ontario service providers. If an individual uses RASP to connect with your program, the request will go to the designated email account that your program has set up in the service provider details in EOIS-CaMS.

*The **RASP** list in CaMS should be checked at least monthly. Data can be added to the Aggregate Data count. Some users may not have access. This will depend on how your profile is setup in EOIS.*

Accessing the RASP Tool

Step 1: Click on the **Workspace** tab

Step 2: Click the **Search for an Application/Referral**



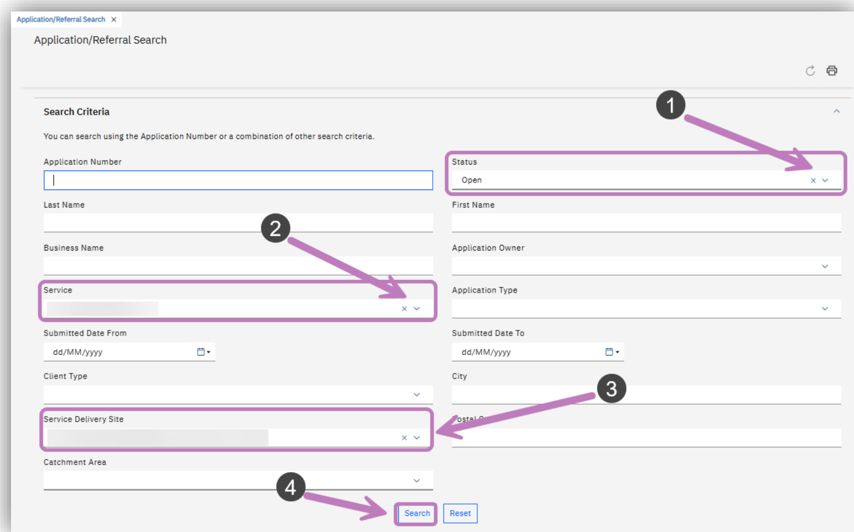
Searching for a RASP

Step 1: Select **Open** from the **Status** drop-down

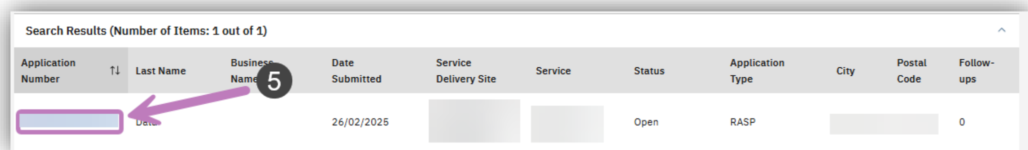
Step 2: Select **Get SET** from the **Service** drop-down

Step 3: Select the appropriate **Service Delivery Site** from the drop-down

Step 4: Click **Search**



Step 5: Click the **Application Number**



Processing a RASP

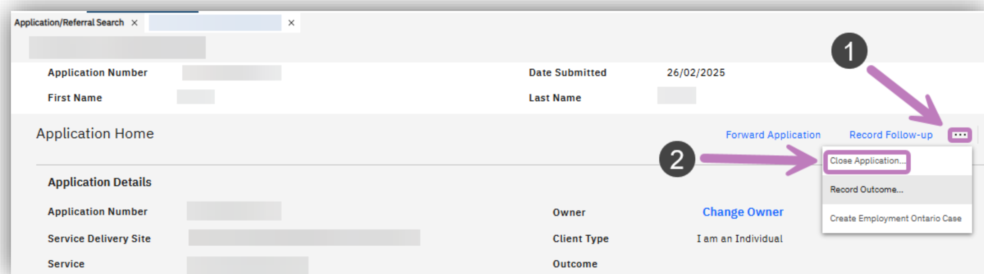
Once you open the application:

- Contact the applicant by **email or phone** about the program and registration process.
- Keep a record of the communication (email or phone call) in the file.
- After completing this task, the RASP must be closed.

Closing the RASP

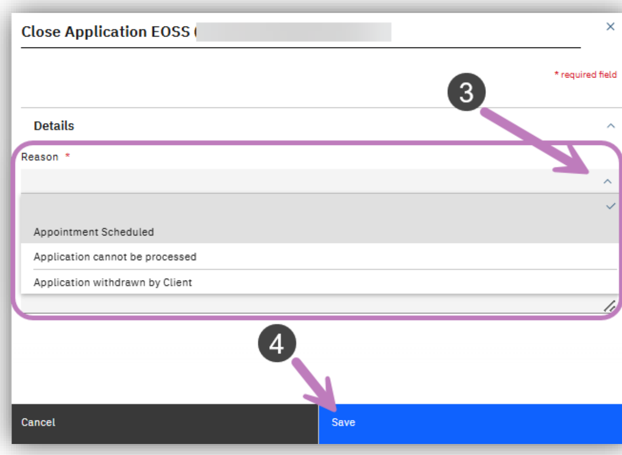
Step 1: Click the **Action** button

Step 2: Select **Close Application** from the drop-down



Step 3: Select the closure **Reason** from the drop-down

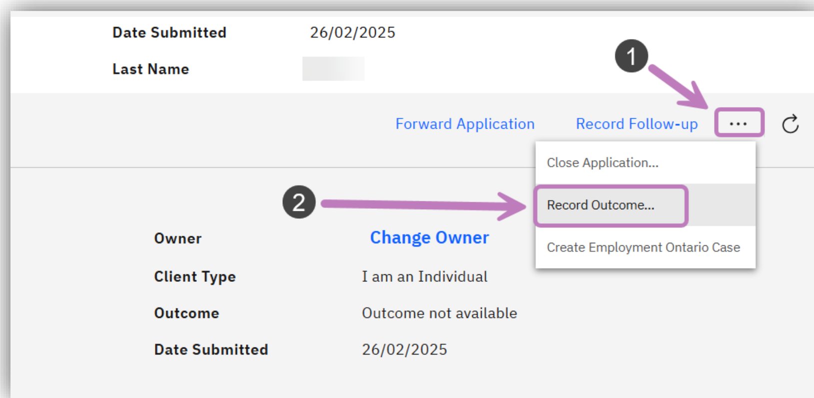
Step 4: Click **Save**



Updating the RASP Outcome

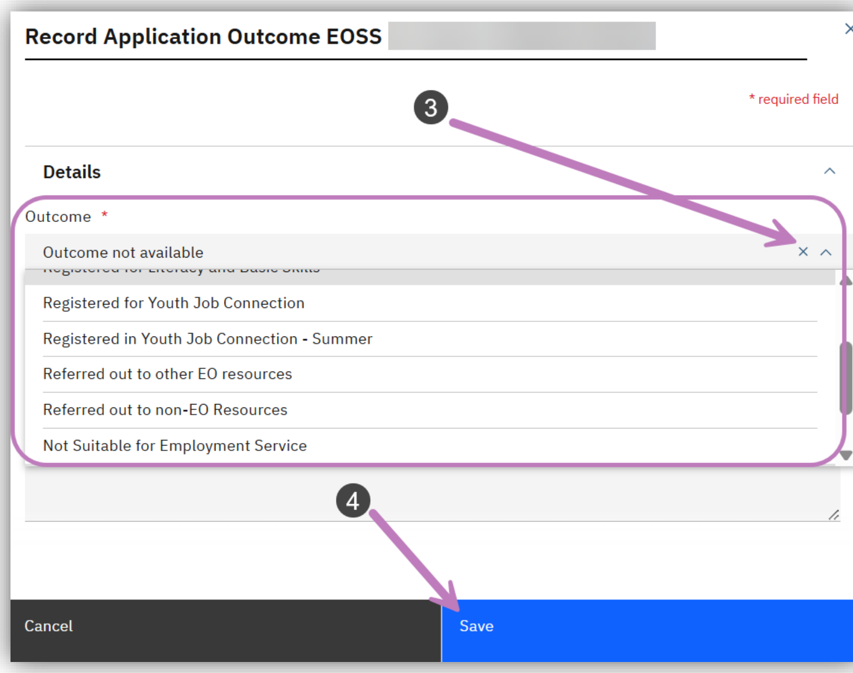
Step 1: Click the **Action** button

Step 2: Select **Record Outcome** from the drop-down



Step 3: Select the closure **Outcome** from the drop-down

Step 4: Click **Save**

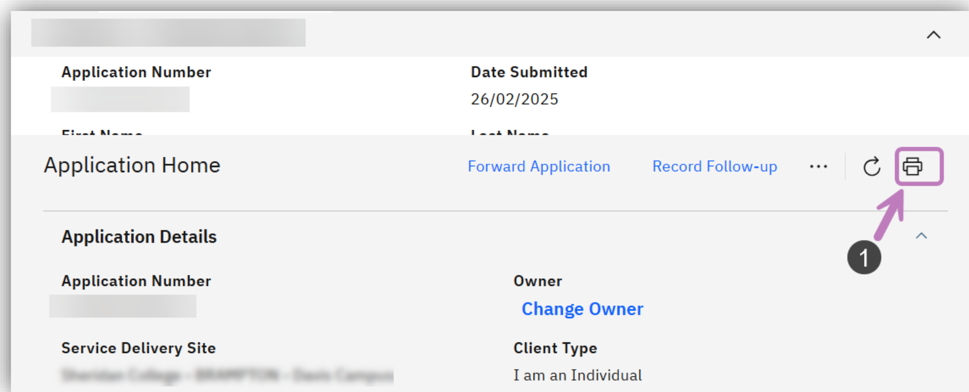


Saving the RASP Application

Documentation must be saved and kept on file:

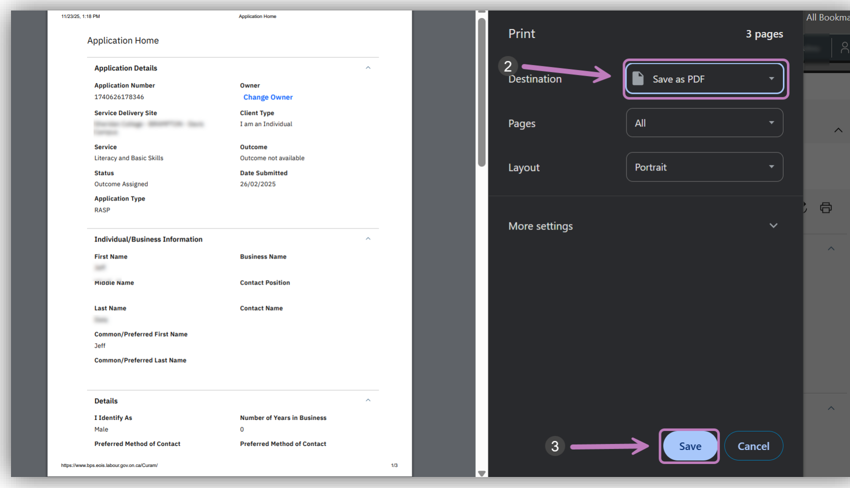
- Save communication with the applicant
- Save the application

Step 1: Click the **Print** icon



Step 2: Select **Print** or **Save as a PDF** from the drop-down

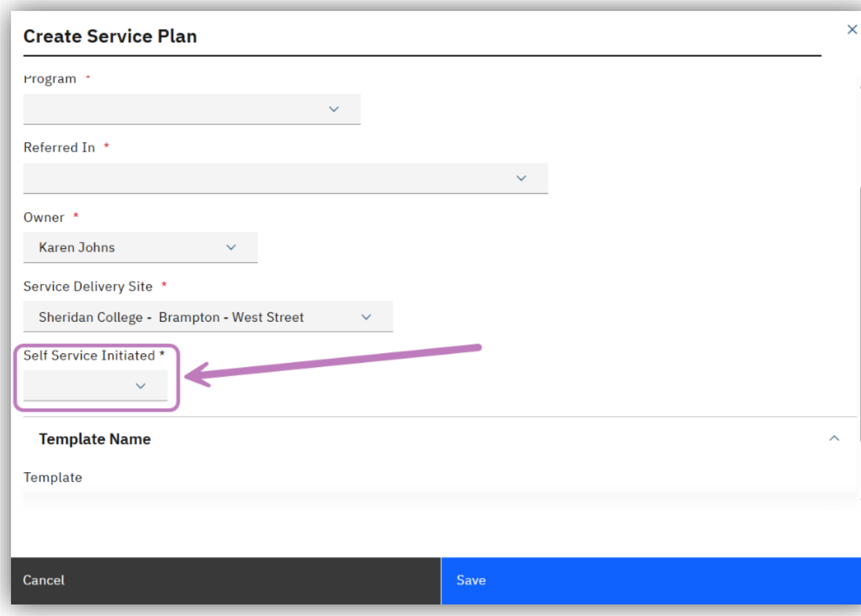
Step 3: Click **Print** or **Save**



Tracking Applications

If the applicant registers with your site:

- When creating the Service Plan, set **Self Service Initiated** to **Yes**.



Documenting Unassisted Services

Get SET service providers may offer **unassisted services** such as **Information Sessions** and **Outreach activities**. These activities support **Service Coordination** and good client service practices. Providers may also refer potential clients to other Get SET providers or community programs. These clients **do not become registered learners** at your Get SET site.

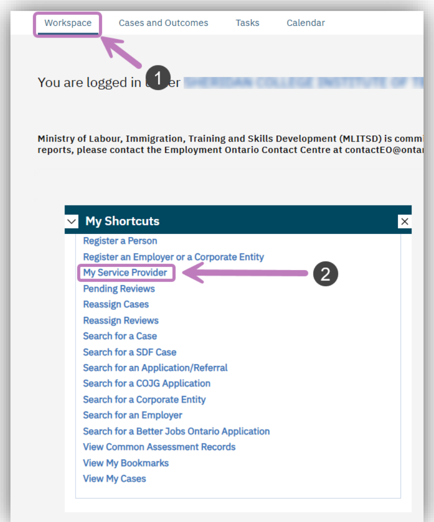
Such data is captured monthly in the **Aggregate Data** section of EOIS-CaMS. Your program will have a process in place to collect that monthly data so that it can be entered in EOIS-CaMS.

Note: Some users may not have access. This will depend on how your profile is setup in EOIS.

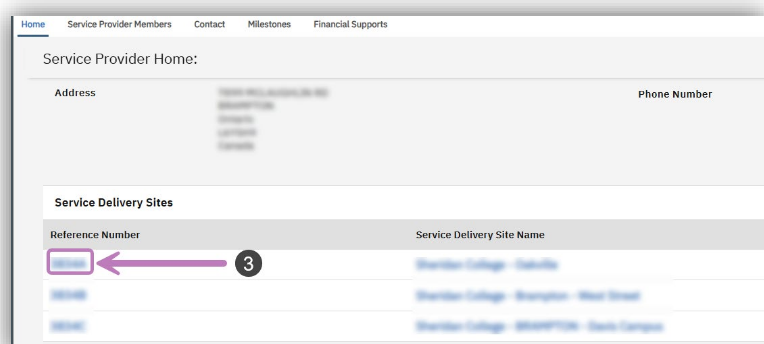
Accessing Aggregate Data

Step 1: Click the **Workspace** tab

Step 2: Click **My Service Provider**

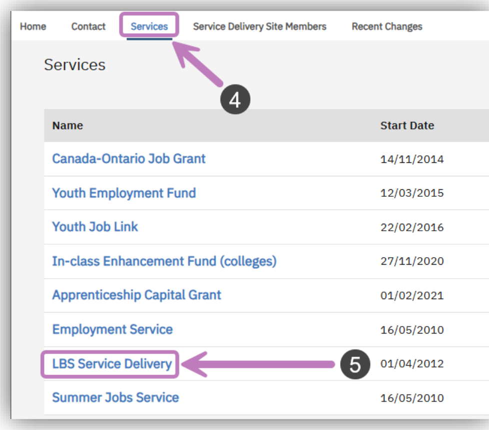


Step 3: Scroll down to the bottom and click the **Site Reference Number**

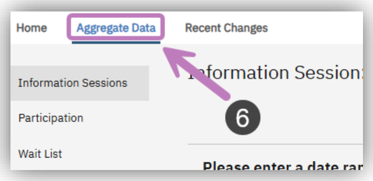


Step 4: Click **Services**

Step 5: Click **Get SET Service Delivery**



Step 6: Click the **Aggregate Data** tab



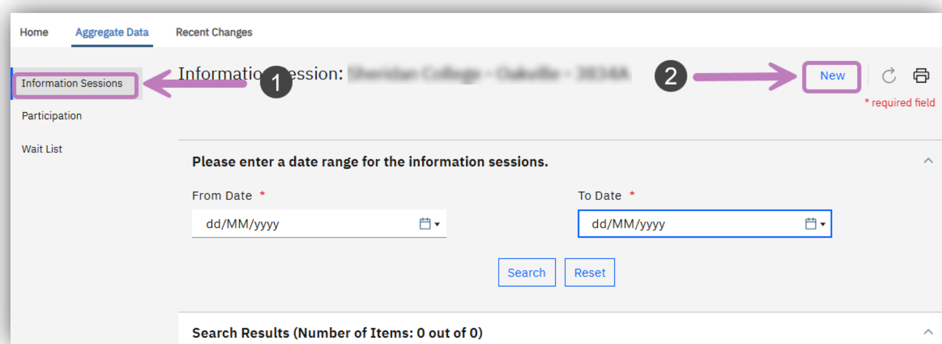
Information Sessions & Outreach Activities

These activities involve reaching out to the community or inviting the community to learn about and promote the Get SET program. Aggregate Data entered should reflect the **number of attendees**.

Add New

Step 1: Click **Information Sessions**

Step 2: Click **New**



Step 3: From the drop-down, choose the **activity**:

- Information Sessions
- Outreach

Step 4: Enter **additional details** about the activity

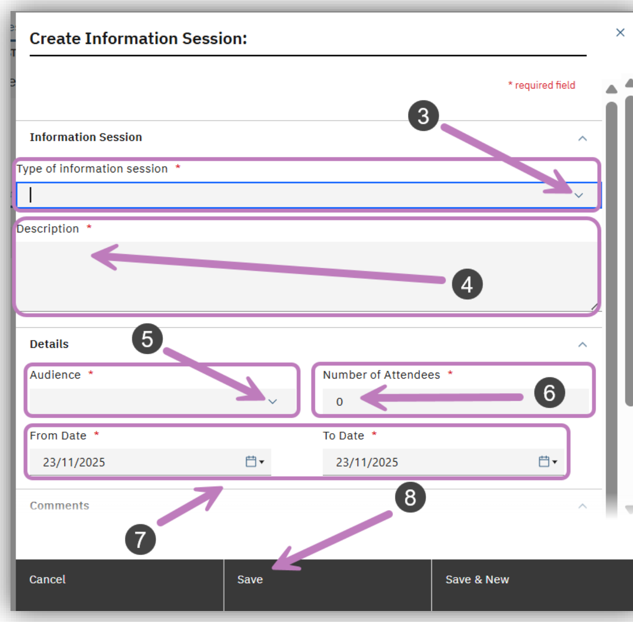
Step 5: From the drop-down, choose the **audience:**

- Employees
- General Public
- Newcomers
- Students

Step 6: Enter the number of **Attendees**

Step 7: Enter the **date range** of the activity

Step 8: Click **Save**



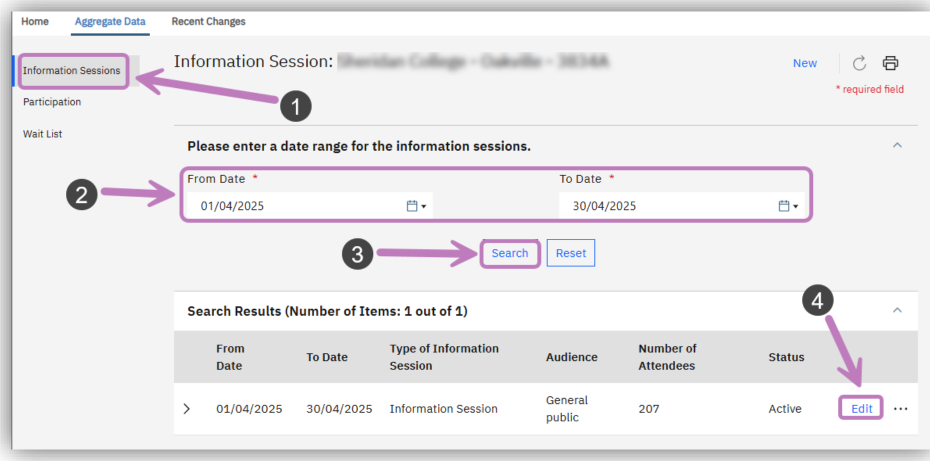
Search and Edit

Step 1: Click **Information Sessions**

Step 2: Enter the **date range**

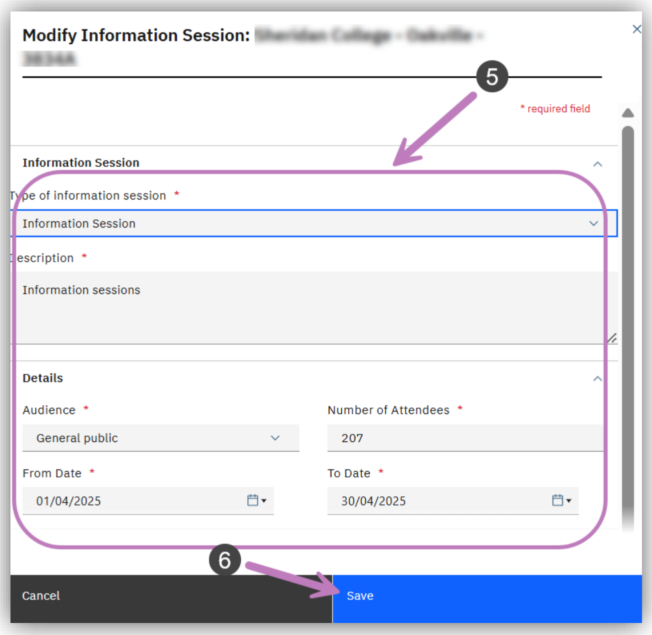
Step 3: Click **Search**

Step 4: Click **Edit**



Step 5: Update the **Information Session or Outreach details**

Step 6: Click **Save**



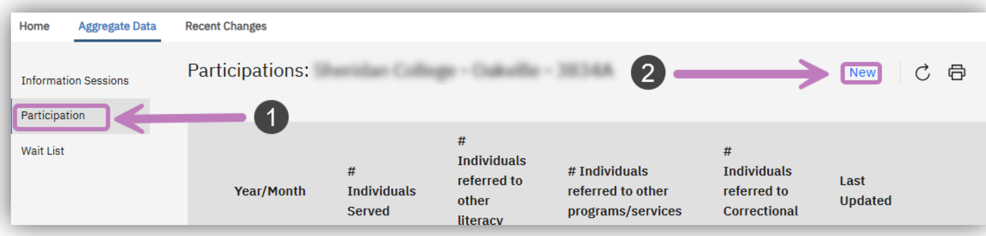
Participation

Aggregate Data for **Participation** allows you to enter the monthly number of client inquiries you receive, as well as referrals for those clients who will not be registering with your program.

Add New

Step 1: Click on **Participation**

Step 2: Click **New**

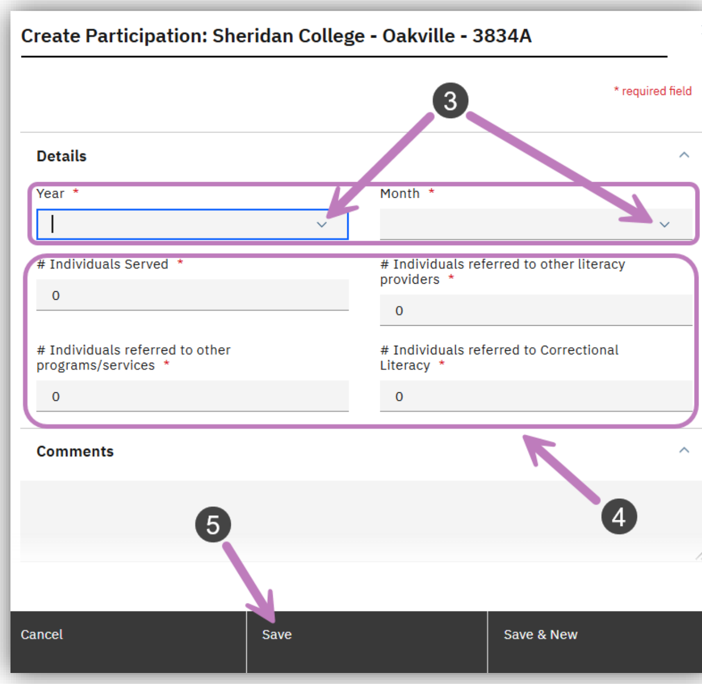


Step 3: Select the **year** and **month** from the drop-down

Step 4: Enter the number of client inquiries/referrals for each section

Leave "0" if no referrals for that section

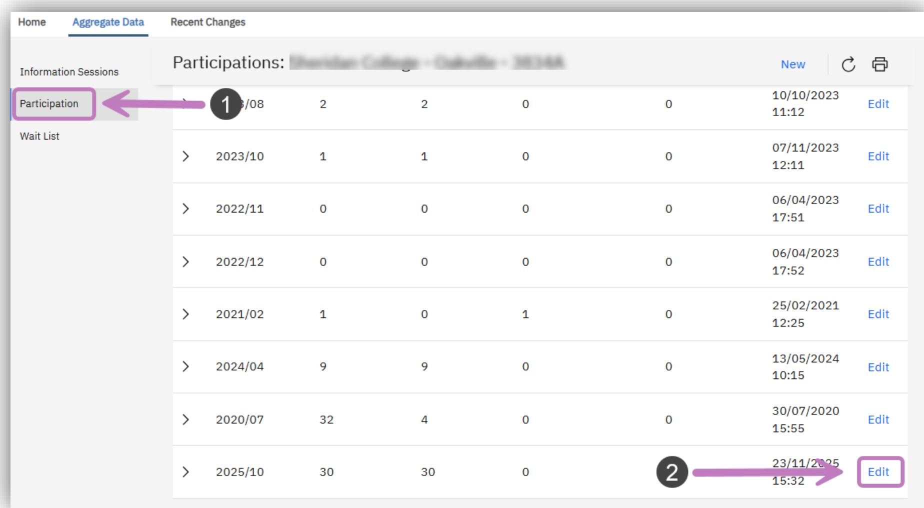
Step 5: Click **Save**



Search and Edit

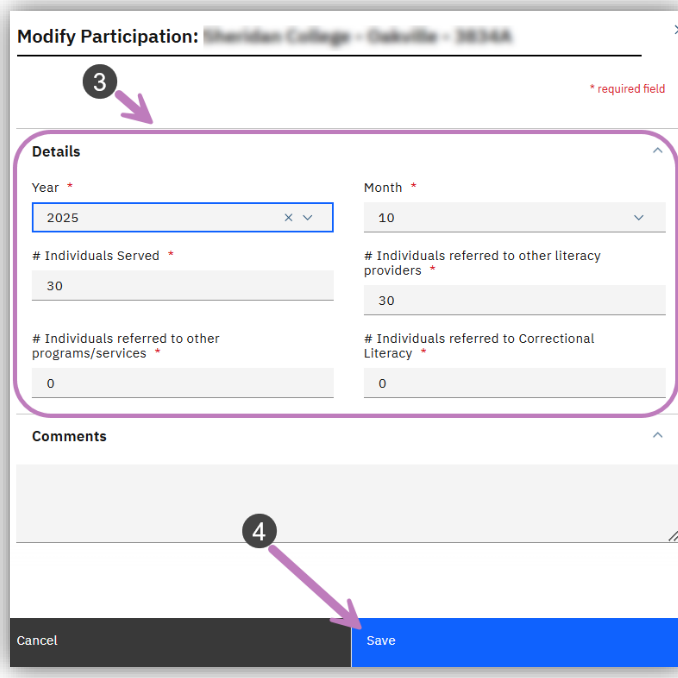
Step 1: Click **Participation**

Step 2: Click **Edit**



Step 3: Update the **Participation**

Step 4: Click **Save**



Service Provider Reports

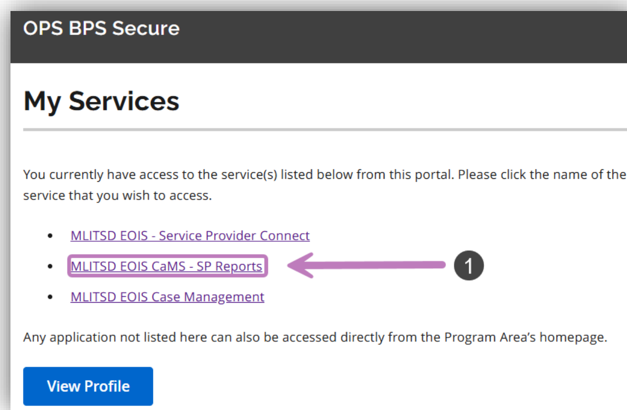
In EOIS-CaMS, **Service Provider Reports** are standardized reports generated from the system to help Get SET programs monitor and manage program delivery, contract compliance, and performance. These reports pull data from the cases and service plans entered into EOIS-CaMS and are essential for reporting to the Ministry.

There are numerous reports available in EOIS-CaMS that service provider users can utilize to effectively manage caseloads and monitor program performance. Depending on your assigned role in EOIS-CaMs, you may not have access to some of these reports.

Accessing the SP Reports

The filter can be used for service sites that provide more than one EO program or service.

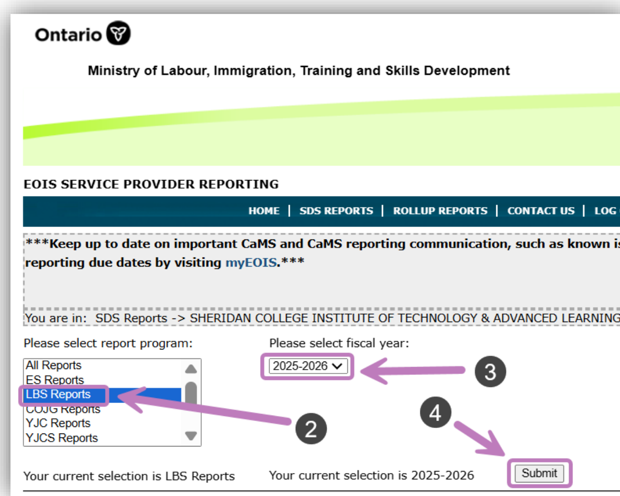
Step 1: Click **MLITSD EOIS-CaMS - SP Reports** on the OPS BPS page (after you log in)



Step 2: Select **Get SET Reports**

Step 3: Select the **fiscal year**

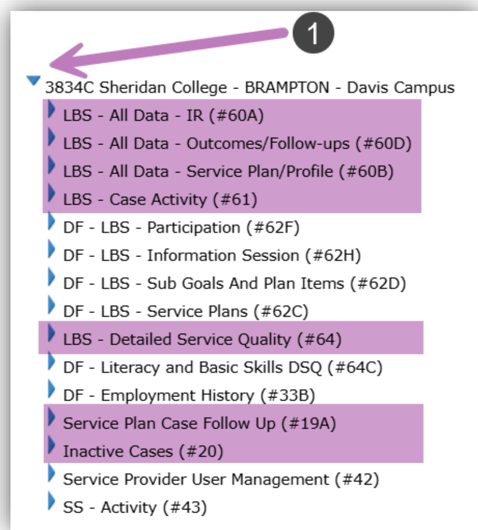
Step 4: Click **Submit**



Helpful SP Reports

Below is a list of some helpful reports. (Again, your access ot the reports depends on your assigned role in EOIS-CaMs. Your program manager or coordinator will likely have access to all of the reports.

Step 1: Click the drop-down arrow
Some of the more useful reports include those highlighted on the left:
 # 60A
 # 60D
 # 60B
 # 61
 # 64
 # 19A
 # 20



Opening a Report

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

To access EOIS-CaMS reports, the user must be given access by the SPRA for your organization.

Acronyms Associated with EOIS

Acronym	Full Name	Definition
ELP	Enhanced Learner Plan	An enhanced (optional) version of the Learner Plan available in EOIS-CaMS
EO	Employment Ontario	The provincial employment and training network that delivers programs and services to job seekers and employers
EOPG	Employment Ontario Partners Gateway	An online portal providing resources, tools, and updates for Employment Ontario service providers
ETC	Employment and Training Consultant	Ministry staff who support service providers and monitor compliance
Get SET	Get SET (Skills, Education and Training)	A program that helps adults improve literacy and basic skills for work, learning, and life
LP	Learner Plan	A document outlining a learner's goals and activities during their Get SET program
MFA	Multi-Factor Authentication	Security process requiring multiple verification steps, e.g. for EOIS-CaMS login
MLITSD	Ministry of Labour, Immigration, Training and Skills Development	The Ontario government ministry responsible for Employment Ontario programs and services
NAICS	North American Industry Classification System	A classification system for industries in North America
NOC	National Occupational Classification	A standardized system for classifying jobs by skill type and level
OPS BPS	Ontario Public Service / Broader Public Sector	Secure portal for Ontario Public Service and Broader Public Sector users to access EOIS-CaMS and other government web applications
OTP	A One-Time PIN	A temporary code sent to a user's email for secure login
PRF	Participant Registration Form	Ministry-generated form used to register participants in the Get SET program
RASP	Request an Appointment with a Service Provider	Online tool for requesting appointments with Employment Ontario service providers
SIN	Social Insurance Number	A unique number issued by the federal government to identify individuals for employment and tax purposes
SP	Service Provider	Organizations contracted to deliver Employment Ontario programs
SPRA	Service Provider Registration Authority	The employee in your organization who is responsible for managing user registration and access to EOIS-CaMS