Chapter 8F2: Service Plan Management for SkillsAdvance Ontario Phase 2
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## Document History

<table>
<thead>
<tr>
<th>Version #</th>
<th>Date</th>
<th>Description</th>
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<tbody>
<tr>
<td>1.0</td>
<td>July 2018</td>
<td>Initial version released with the launch of SAO Phase 2 in EOIS-CaMS</td>
</tr>
<tr>
<td>1.1</td>
<td>September 2018</td>
<td>Updated to include Retention Services</td>
</tr>
<tr>
<td>1.2</td>
<td>September 2018</td>
<td>Update screenshots re Curam v7 Upgrade</td>
</tr>
<tr>
<td>1.3</td>
<td>January 2019</td>
<td>Appendix added regarding sub-goals and plan items</td>
</tr>
<tr>
<td>1.4</td>
<td>February 2019</td>
<td>Updated screenshots re: new client summary fields</td>
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8.1 Introduction

Note: This chapter deals exclusively with the SkillsAdvance Ontario (SAO) Phase 2 service plan. For service providers serving clients under Phase 1 of SAO, please refer to Chapter 8F. For Employment Service (ES) service plans, refer to Chapter 8A. For the Literacy and Basic Skills (LBS) service plan, refer to Chapter 8B. For Canada-Ontario Job Grant (COJG) service plans, refer to Chapter 8C. For Youth Job Connection (YJC) and Youth Job Connection Summer (YJCS) service plans, refer to Chapter 8D, and Youth Job Link (YJL) service plans, refer to Chapter 8E.

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

The primary reason for the creation of any service plan is to enable a client to achieve a specific goal. In most cases, a goal must be divided into steps that need to be attained in order to achieve the overall plan goal.

Building these steps individually provides a more manageable way of achieving the overall service plan goal. A case worker will have the ability to track all client participation, identifying any failure on behalf of the client to meet the required objectives. In this way, the service provider can measure the efficiency of both the client and the overall service plan.

8.2 SkillsAdvance Ontario (SAO) Phase 2

SkillsAdvance Ontario is a sector-based workforce development pilot program. It supports partnerships that bring together sector-based employers and employment and training providers to a pool of job-ready, skilled workers that meet the workforce development needs of employers. It provides jobseekers and incumbent workers with sector-focused employment and training services to support them to obtain, succeed, and advance in both entry level positions and higher level jobs.

Phase 2 provides the opportunity to build upon the objectives of Phase 1 while incorporating feedback from the first phase. The differences between Phase 1 and Phase 2 are described in the following table:

<table>
<thead>
<tr>
<th>Phase 1</th>
<th>Phase 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eligibility restricted to unemployed jobseekers.</td>
<td>Eligibility expanded to also include incumbent workers and precariously employed individuals seeking better work.</td>
</tr>
</tbody>
</table>
## Phase 1
Eligible training limited to low- and medium-skilled occupations, which typically have lowers barriers to entry

<table>
<thead>
<tr>
<th>Phase 1</th>
<th>Phase 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eligible training expanded to include sectors/industries/occupations that require higher skills, where sectors have identified workforce needs.</td>
<td>Supports of up to $3,000 available to jobseekers and/or incumbent workers to address barriers to participating in skills training. Supports have been expanded to include: Travel Emergency dependent care Food security</td>
</tr>
<tr>
<td>All participating jobseekers required to participate in 5 mandatory sector-focused components.</td>
<td>The service components are not mandatory and do not have to be completed sequentially.</td>
</tr>
<tr>
<td>Supports of up to $1,000 available to address jobseekers' temporary financial barriers to participation in mandatory service components.</td>
<td>Partnership development and service delivery can be separated and funded through distinct agreements</td>
</tr>
</tbody>
</table>
| Partnership development and service delivery are combined/funded together | 8.3 Service Plan Structure

The service plan includes one goal for the overall service plan, one or more sub-goals, and one or more plan items for each sub-goal.

### 8.3.1 Goal

The goal is the primary objective or desired outcome of the service plan, which the client is working towards. The SAO Phase 2 service plan goal is “Sustainable Employment”.
8.3.2 Sub-Goals

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

The SAO Phase 2 service plan sub-goals are:

- Client Service Planning and Coordination
- Pre-Employment Services
- Essential and Technical Skills
- Job Matching and Placement

For SAO Phase 2, there are no mandatory sub-goals. However, 1 sub-goal must be attained in order for a service plan to be closed to completion. This allows for the program to be tailored to the individual needs of a participant.

8.3.3 Plan Items

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

For more on SAO Phase 2 plan items, see Appendix 2: Sub-Goals and Plan Items

8.4 Service Plan Template

The Ministry has created service plan templates based on SAO Phase 2 program objectives and guidelines. The templates include a predefined set of sub-goals, which include plan items. Service providers must use these templates when creating service plans; however, a service plan created from a template can still be customized to meet the individual requirements of a specific client, thus providing even greater flexibility.

8.4.1 Client Summary

A client summary is a mandatory element for each service plan and it captures details that are unique to the client. This information can be obtained from the SkillsAdvance Ontario Participant Registration form.

8.4.2 Plan Summary
A plan summary is a mandatory element for each service plan and it details the activities that the client agrees to undertake to achieve their service plan goal. It reflects the structure of the plan and shows all activities listed under it. The plan summary is to be printed for and accepted by the client but is not a binding agreement.

### 8.5 Roles and Responsibilities

The creation and management of service plans is the responsibility of service providers. Ministry users with appropriate system access may view, plan but cannot create or modify service plans. The following table lists the actions that each system user role can perform.

<table>
<thead>
<tr>
<th>Roles</th>
<th>Search/View Service Plan</th>
<th>Create Service Plan</th>
<th>Modify Service Plan</th>
<th>Close Service Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Provider Manager</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Service Plan Manager Non-Case</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Service Provider Caseworker</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Service Provider Administrator</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Ministry Manager</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Ministry Regional Administrator</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Ministry Caseworker</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>
8.6 Building a Service Plan

The successful creation of a service plan requires the following steps to be performed in sequence and will be explained in this section.

1. Create a service plan from a template
2. Create a client summary
3. Add additional sub-goals (if required)
4. Add plan items to sub-goal(s)
5. Submit service plan for approval
6. Create plan summary
7. Record acceptance of plan summary

8.7 Create Service Plan

Prerequisite

The Employment Ontario Case must exist in order to create a service plan for a client. If one does not exist, refer to Chapter 6 for instructions on how to create an Employment Ontario Case.

For information on how to find an Employment Ontario Case within the system, refer to Case Search in Chapter 2.

A client can only have one “Open”, “Approved”, or “Active” SAO Phase 2 Service Plan at a time. A client cannot have both a SAO Phase 1 and SAO Phase 2 Service Plans at the same time.

While participating in either SAO Phase 1 or 2, a participant cannot take part in any other EO Programming, with the exception of LBS. If a client has been referred to LBS, the SAO Phase 2 and LBS service plans can run simultaneously.

System Steps

Step 1: Employment Ontario Home Page

Click NEW SERVICE PLAN from the Action Button.
System will prevent the user from creating a service plan if the client is deceased and the date of death has been recorded.

⚠️ Step 2: Create Service Plan Page

Complete all fields. Select “SkillsAdvance Ontario Phase 2” as the Program, which will pre-populate the appropriate Template. For Referred In, click on the drop-down menu and select the appropriate response. For the Service Delivery Site, click on the drop-down menu and select the appropriate Service Delivery Site Name. If only one site delivers the selected service, it will automatically populate. The Service Delivery Site will populate on the Create Service Plan page. Only Service Delivery Sites offering the selected program will appear in the list. Click SAVE.
Step 3: Service Plan Home Page

Ensure that all information in the service plan is correct.

The system auto-creates the four SAO Phase 2 sub-goals that are used to administer the program. The four sub-goals are not mandatory for SAO Phase 2. However, at least 1 sub-goal must be attained before the SAO Phase 2 Service Plan can be closed.

Once a service plan has been created the status will be set to “Open;” this appears on the Service Plan Home page. A service plan can have various statuses. For a detailed description of status definitions and Service Plan Home page features, refer to the Appendix 1.

8.7.1 Create Client Summary

Only one client summary can be created per service plan. Please note that the client summary can be modified, but a new one cannot be created.

A client summary must be created before submitting the service plan for approval.

System Steps
Step 1: Service Plan Home Page

Click the **Client Summary** tab.

![Client Summary Tab](image)

Step 2: Client Summary Page

Click **NEW**.

![Client Summary Page](image)

Step 3: Create Client Summary Page

The Client Summary captures client details unique to SAO Phase 2. If “Other” is selected for **Essential Skills Assessment Tool Used**, then the corresponding **Other Description** field is enabled and a description is required to be entered. With the launch of SAO Phase 2, the previous drop-down menu for **Source of Income** has now been replaced with a multi-select checkbox. In addition, the ‘Other’ option has been replaced with a free text option. For SAO Phase 2, participants must be classified as either an Incumbent or Jobseeker using the **Participant Type** drop-down menu. Complete all fields, and click SAVE.
8.7.2 Add Additional Sub-Goal(s)

Adding a sub-goal is not a mandatory step for creating a service plan. For SAO Phase 2, adding a sub-goal would be used when the client is being referred to programs and/or services outside of the program. For example, the client may be identified as benefitting from also participating in the Literacy & Basic Skills program. In this case, the sub-goal ‘Referral to Other Programs and Services’ would need to be added.

System Steps

 NUnit Step 1: Service Plan Home Page
Click the Plan Content tab.
Step 2: Plan Content Page

Click NEW SUB-GOAL.

Step 3: Create Sub-Goal Page

Click SELECT for the appropriate Sub-Goal Type and Sub-Goal.
### Create Sub-Goal

<table>
<thead>
<tr>
<th>Action</th>
<th>Sub-Goal Type</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
<td>Ministry Delivered Programs</td>
<td>Referral to Ministry Delivered Programs</td>
</tr>
<tr>
<td>Select</td>
<td>Referral Out to Other Community Resources</td>
<td>Referral Out to Other Community Resources</td>
</tr>
<tr>
<td>Select</td>
<td>Referral to Other Programs and Services</td>
<td>Referral to Other Programs and Services</td>
</tr>
<tr>
<td>Select</td>
<td>SkillsAdvance Ontario</td>
<td>Client Service Planning and Coordination</td>
</tr>
<tr>
<td>Select</td>
<td>SkillsAdvance Ontario</td>
<td>Essential and Technical Skills</td>
</tr>
<tr>
<td>Select</td>
<td>SkillsAdvance Ontario</td>
<td>Job Matching and Placement</td>
</tr>
<tr>
<td>Select</td>
<td>SkillsAdvance Ontario</td>
<td>Post-Employment Services</td>
</tr>
<tr>
<td>Select</td>
<td>SkillsAdvance Ontario</td>
<td>Pre-Employment Services</td>
</tr>
</tbody>
</table>

✿ Step 4: Add Sub Goal Page

Click SAVE.
8.7.3 Add Plan Item

Available Plan Items will depend on the sub-goal. In order to provide a specialized set of services that can be customized to the need of the participant, not all plan items will be required to complete a sub-goal.

Fields on the Plan Item page will vary depending on the activity.

For clients who have both an SAO Phase 2 service plan and a LBS service plan, activities that overlap the two programs, record the plan items in both service plans.

8.7.3.1 Add Plan Item

System Steps

- Step 1: Service Plan Home Page
Click the Plan Content tab.

**Step 2: Plan Content Page**

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

**Step 3: Select Plan Item Type Page**

Click the checkbox beside the appropriate **Plan Item**.
Step 4: Add Plan Item Page

Complete fields as necessary. For Expected Outcome, if there is only one available option, this field will pre-populate. If this field does not pre-populate, there are multiple options; therefore, click the drop-down menu and select the appropriate value. Once completed, the Expected Outcome will populate on the Add Plan Item page. For Expected Start Date and Expected End Date, if these dates have been defined, enter them; if not, use the default dates, and click SAVE & EXIT.
8.7.3.2  Add Plan Item: Custom

When a client is completing an activity that is not captured in the available plan items, the plan item ‘Custom Basic Plan Item’ can be used. For example, if the client is attending anger management workshops, this could be recorded uses the plan item ‘Custom Basic Plan Item’.

Prerequisite

Follow steps 1 to 2 in Section 8.6.3.1.

System Steps

ราชการ  Step 3: Select Plan Item Type Page
ราชการ  In the list of plan items, click the checkbox next to Custom Basic Plan Item.
Step 4: Add Plan Item Page

Complete fields as necessary. For **Expected Outcome**, the system defaults to the appropriate value. For **Expected Start Date** and **Expected End Date**, if these dates have been defined, enter them; if not, use the default dates. In the **Name** field, enter in an appropriate name for the plan item. When all fields are completed click **SAVE & EXIT**.
8.7.3.3 Add Plan Item: Supports

For SAO Phase 2, the combined total of all Supports for Individual plan items and Job Placement Stipend plan items cannot exceed $3000

Prerequisite

Follow steps 1 to 2 in Section 8.6.3.1.

System Steps

∪ Step 3: Select Plan Item Type Page
In the list of plan items associated with the Job Matching and Placement sub-goal, click the checkbox next to Supports for Individuals - Clothing.
**Step 4: Add Plan Item Page**

Complete fields as necessary. For **Expected Outcome**, the system defaults to the appropriate value. For **Expected Start Date** and **Expected End Date**, if these dates have been defined, enter them; if not, use the default dates, and click SAVE & EXIT.
Estimated Cost for all Supports for Individuals and Job Placement Stipend plan items cannot exceed a combined total of $3000. For example, the sub-goal can consist of one supports for individuals plan item for $3000 or four different Supports for Individuals plan items ($750 each totalling $3000). Supports for Employers plan items cannot exceed $1,000.

8.7.3.4 Add Plan Item: Placement

In SAO Phase 2 there is no ‘Job Trials’ plan item for the Pre-Employment Services sub-goal.

New for SAO Phase 2, there is now a ‘Job Placement Stipend’ plan item for the Job Placement sub-goal. The ‘Job Placement Stipend’ plan item must be a maximum of 35 hours per week, be a maximum of a two week (14 day) period, and cannot exceed the current minimum wage rate.
The employer must be registered in the system and linked to a Corporate Entity. If the Employer is not registered or linked to a Corporate Entity, refer to the Employer Management chapter.

Follow steps 1 to 2 in Section 8.6.3.1.

System Steps

❖ Step 3: Select Plan Item Type Page

In the list of plan items associated with the Job Matching and Placement sub-goal, click the checkbox next to Job Placement - General.
Step 4: Add Plan Item Page
Click on the magnifying glass icon to conduct an Employer Search.

Add Plan Item:

Step 5: Employer Search Page
Complete the appropriate fields, and click SEARCH.

Step 6: Employer Search Page
Click SELECT beside the appropriate employer.
Step 7: Add Plan Item Page

The **Employer** name will populate the Add Plan Item page. Complete fields as necessary. For **Expected Outcome**, if there is only one available option, this field will pre-populate. The **Expected Start Date, Expected End Date, National Occupation Code**, and **NAICS** must be entered at the time of creation. Click SAVE & EXIT.
The Estimated Cost of plan items reflects the funds a service provider is flowing to the client or employer to support the job placement. For example, participant flow-through funding may be used to transportation expenditures that enable a participant to travel to a job placement. Estimated Cost does not reflect the amount the client will be earning in a job placement.

8.7.4 Submit for Approval

Prerequisites

- The client summary is required before a service plan can move to “Approved” status. If the system does not find a client summary, an error will occur.
• A Social Insurance Number must be entered for the service plan to be approved.

System Steps

Step 1: Service Plan Home Page
Review the service plan, and select SUBMIT FOR APPROVAL from the Action Button.

Step 2: Submit Service Plan Page
When prompted to confirm the submission, click YES.

Step 3 Service Plan Home Page
The Status of the service plan will appear as “Approved.”
8.7.5 Create Plan Summary

System Steps

❖ Step 1: Service Plan Home Page
Click the Plan Summary tab.

❖ Step 2: Plan Summary Page
Click NEW.

❖ Step 3: Plan Summary Page
The plan summary has been created. The system populated the summary using the client and the client’s address. As well, the Issued Date is set to the current date and the Reason is set to “Initial.” Click SELECT.

❖ Step 4: Plan Summary Home Page
Confirm information is correct. To print the plan summary, select DOWNLOAD PLAN IN ENGLISH or DOWNLOAD PLAN IN FRENCH (depending on the language the client prefers) from the Action Button.
8.7.6 Record Plan Summary Acceptance

System Steps

่อ Step 1: Service Plan Home Page
Click the Plan Summary tab.

ério Step 2: Plan Summary Page
Click SELECT next to the plan summary that requires a date signed.

ério Step 3: Plan Summary Home Page
From the Action Button, select EDIT.
Step 4: Modify Plan Summary Details Page

To record plan summary acceptance, enter the **Date Accepted** in the **Acceptance** information panel.

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

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

Once all appropriate fields are complete, click SAVE.
Step 5: Plan Summary Home Page

The status has changed to “Active.”
8.7.6.1 Modify (Complete) Plan Items

System Steps

 вещ Step 1: Service Plan Home Page

Click the Plan Content tab

 вещ Step 2: Plan Content Page

Toggle the relevant sub-goal.

 вещ Step 3: Plan Content Page

Click on the Action Button next to the appropriate plan Item and select Edit Plan Item.
Step Four: Modify Plan Item page

Enter the **Actual Start Date, Actual End Date, and Actual Cost.** Select the appropriate **Outcome** from the drop-down menu. Once done click Save.

**Step 5: Plan Content Page**

The **Status** has now changed to “Completed” and the **Outcome** has now changed to “Attained.”
The sum of actual costs will display as **Total Supports** on the service plan home page for the following sub-goals and plan items:

Pre-Employment Services
- All plan items

Job Matching and Placements
- Job Placement – General
- Custom Basic Plan Item

Post-Employment Services
All plan items

### 8.7.6.2 Modify (Complete) Plan Items: Job Placement

**System Steps**

1. **Step 1: Service Plan Home Page**
   - Click the **Plan Content** tab.
Step 2: Plan Content Page
Toggle the Job Matching and Placement sub-goal.

- Client Service Planning and Coordination
  - Start Date: 20/09/2018
  - End Date: 20/09/2018
  - Status: Not Started

- Job Matching and Placement
  - Start Date: 16/04/2018
  - End Date: 20/09/2018
  - Status: Not Started

Step 3: Plan Content Page
Click EDIT PLAN ITEM from the Action Button next to the Job Placement - General plan item.
Step 4: Modify Plan Item Page

Enter the Actual Start Date, Actual End Date, and Actual Cost. Select the appropriate Outcome from the drop-down menu. Employment Outcome is a mandatory field if the Actual End Date is specified. Complete the Placement Information section as needed. If the Actual Start Date is specified, then Job Title, Placement Category, and Employment Hours Per Week are mandatory fields. Complete all Customer Satisfaction questions, and click SAVE.

Both Estimated Cost and Actual Cost for all Supports for Individuals plan items and Job Placement Stipend cannot exceed a combined total of $3000.00. For example, the service plan can consist of one supports for individuals plan item for $3000 or four different supports for individuals plan items ($750 each totalling $3000).

Estimated Costs for all Supports for Employers plan items cannot exceed $1000.
For SAO, **Employment Outcome** is captured at the Placement Plan Item level and at the service plan closure. **Customer Satisfaction** is captured only at the Placement Plan Item level.

For SAO Phase 2, the **Customer Satisfaction Survey** is mandatory:

1) Upon the successful completion of the *Job Placement – General* plan item
2) 8 weeks after the Start Date has been entered for *Referred to Employment, Referred to Union Hall, or Registered as an Apprentice* plan items. The **SAO Phase 2 Customer Satisfaction Survey** notification pod on your workspace page will list SAO Service Plans with plan items requiring the survey follow-up per case.
Step 5: Plan Content Page

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

Note that when the plan item has an **Outcome** of “Attained,” the system will create a new employment record within the **Background** folder of the client profile. Modifications to this new record can only be made within the plan item. Also, this employment record will be set as the “Primary” record if one does not already exist for the client.

### 8.7.6.3 Delete Plan Item

If a plan item has a status of “Completed,” it cannot be deleted; it can only be cancelled. Please refer to Section 8.6.6.3 Cancel Plan Item to perform this function. Once a plan item has been deleted, no record remains.

**Delete Plan Item** should be used when a plan item has been added to a client’s service plan by mistake.

**System Steps**

1. **Step 1: Service Plan Home Page**
   - Click the **Plan Content** tab.
Step 2: Plan Content Page

Toggle the relevant sub-goal.

<table>
<thead>
<tr>
<th>Name of Sub-Goal</th>
<th>Start Date</th>
<th>End Date</th>
<th>Status</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client Service Planning and Coordination</td>
<td>20/09/2018</td>
<td>20/09/2018</td>
<td>Not Started</td>
<td></td>
</tr>
<tr>
<td>Job Matching and Placement</td>
<td>18/04/2018</td>
<td>11/06/2018</td>
<td>In Progress</td>
<td></td>
</tr>
<tr>
<td>Essential and Technical Skills</td>
<td></td>
<td></td>
<td>Not Started</td>
<td></td>
</tr>
<tr>
<td>Pre-Employment Services</td>
<td></td>
<td></td>
<td>Not Started</td>
<td></td>
</tr>
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</table>

Details

<table>
<thead>
<tr>
<th>Name</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client Service Planning and Coordination</td>
<td></td>
</tr>
<tr>
<td>Type</td>
<td>Owner</td>
</tr>
<tr>
<td>Plan Items</td>
<td></td>
</tr>
</tbody>
</table>

Step 3: Plan Content Page

Click DELETE PLAN ITEM from the **Action Button** next to the relevant plan item. When prompted to confirm the delete, click YES.
Step 4: Plan Content Page

The deleted plan item will no longer appear with the associated sub-goal.
8.7.6.4 Cancel Plan Item

**Cancel Plan Item** should be used to reflect a change in the client’s plan. It can also be used if a plan item was added by mistake to a client’s service plan but the status has already been modified to completed.

System Steps

👉 Step 1: Service Plan Home Page
Click the **Plan Content** tab.

👉 Step 2: Plan Content Page
Toggle the relevant sub-goal.
Step 3: Plan Content Page

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

Step 4: Modify Plan Item Page

Select “Cancelled” from the Outcome drop-down menu. If an Actual Start Date has been previously entered and saved, delete the date. Click SAVE.
Step 5: Plan Content Page

The Outcome has changed to “Cancelled.”

<table>
<thead>
<tr>
<th>Client Service Planning and Coordination</th>
<th>20/09/2018</th>
<th>20/09/2018</th>
<th>Not Started</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Client Service Planning and Coordination</td>
<td>Outcome</td>
<td></td>
</tr>
<tr>
<td>Type</td>
<td>SkillsAdvance Ontario</td>
<td>Owner</td>
<td></td>
</tr>
<tr>
<td>Plan Items</td>
<td>Name</td>
<td>Start Date</td>
<td>End Date</td>
</tr>
<tr>
<td>Attend Workshop</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
8.7.7 Cancel Sub-Goal

System Steps

✦ Step 1: Plan Content Page
From the **Action Button** next to the relevant sub-goal, select **EDIT SUB-GOAL**.

<table>
<thead>
<tr>
<th>Name of Sub-Goal</th>
<th>Start Date</th>
<th>End Date</th>
<th>Status</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client Service Planning and Coordination</td>
<td>20/09/2018</td>
<td>20/09/2018</td>
<td>Not Started</td>
<td></td>
</tr>
<tr>
<td>Pre-Employment Services</td>
<td></td>
<td></td>
<td>Not Started</td>
<td></td>
</tr>
<tr>
<td>Essential and Technical Skills</td>
<td></td>
<td></td>
<td>Not Started</td>
<td></td>
</tr>
<tr>
<td>Job Matching and Placement</td>
<td>16/04/2018</td>
<td>11/06/2018</td>
<td>In Progress</td>
<td></td>
</tr>
<tr>
<td>Referral to Other Programs and Services</td>
<td></td>
<td></td>
<td>Not Started</td>
<td></td>
</tr>
</tbody>
</table>

✦ Step 2: Modify Sub-Goal Page
Select “Cancelled” from the **Outcome** drop-down menu and click **SAVE**.
Step 3: Plan Content Page

The **Outcome** has changed to “Cancelled”.

<table>
<thead>
<tr>
<th>Name of Sub-Goal</th>
<th>Start Date</th>
<th>End Date</th>
<th>Status</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client Service Planning and Coordination</td>
<td>20/09/2018</td>
<td>20/09/2018</td>
<td>Not Started</td>
<td></td>
</tr>
<tr>
<td>Pre-Employment Services</td>
<td></td>
<td></td>
<td>Not Started</td>
<td></td>
</tr>
<tr>
<td>Essential and Technical Skills</td>
<td></td>
<td></td>
<td>Not Started</td>
<td></td>
</tr>
<tr>
<td>Job Matching and Placement</td>
<td>15/04/2018</td>
<td>11/06/2018</td>
<td>In Progress</td>
<td></td>
</tr>
<tr>
<td>Referral to Other Programs and Services</td>
<td></td>
<td></td>
<td>Not Started</td>
<td><strong>Cancelled</strong></td>
</tr>
</tbody>
</table>

**8.7.7.1 Complete Sub-Goals**

**Prerequisite**

All associated plan items must have a status of “Completed” or “Cancelled.”

**System Steps**

Step 1: Plan Content Plan
From the **Action Button** next to the relevant sub-goal, select **EDIT SUB-GOAL**.

### Step 2: Modify Sub-Goal Page

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

### Step 3: Plan Content Page

The **Outcome** has changed.
After the sub-goal is completed, the client must be asked if they require any follow-up supports. If the client requires follow-up supports, Post-Employment Services sub-goal must be added. See section 8.6.8 for instructions.

8.7.8 Adding Retention Services (Post-Employment Sub-Goal)

Prerequisite

- Sub-goal closed to attained and client has requested follow-up services.

System Steps

➡️ Step 1: Service Plan Home Page

Click on Plan Content tab.

➡️ Step 2: Plan Content Page

Click on New Sub-Goal
Step 3: Create Sub-Goal page

Click Select for Post-Employment Services

<table>
<thead>
<tr>
<th>Name of Sub-Goal</th>
<th>Start Date</th>
<th>End Date</th>
<th>Status</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client Service Planning and Coordination</td>
<td>20/09/2018</td>
<td>20/09/2018</td>
<td>Not Started</td>
<td></td>
</tr>
<tr>
<td>Job Matching and Placement</td>
<td>26/02/2018</td>
<td>11/06/2018</td>
<td>Completed</td>
<td>Attained</td>
</tr>
<tr>
<td>Essential and Technical Skills</td>
<td>20/09/2018</td>
<td>20/09/2018</td>
<td>Completed</td>
<td>Attained</td>
</tr>
<tr>
<td>Pre-Employment Services</td>
<td></td>
<td></td>
<td>Not Started</td>
<td></td>
</tr>
</tbody>
</table>
Step 4: Add Sub-Goal page

Select Save

Step 5: Plan Content page

Click on the Action Button next to Post-Employment Services and select Add Plan Item
Step 6: Select Plan Item Type page

Click the box next to the appropriate plan item. Click Continue.

<table>
<thead>
<tr>
<th>Name</th>
<th>Plan Item Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Career Management Assistance - Career Counselling</td>
<td>Basic Plan Item</td>
<td></td>
</tr>
<tr>
<td>Career Management Assistance - Career Planning</td>
<td>Basic Plan Item</td>
<td></td>
</tr>
<tr>
<td>Career Management Assistance - Other</td>
<td>Basic Plan Item</td>
<td></td>
</tr>
<tr>
<td>Job Retention Support - Issues Resolution</td>
<td>Basic Plan Item</td>
<td></td>
</tr>
<tr>
<td>Job Retention Support - Monitoring</td>
<td>Basic Plan Item</td>
<td></td>
</tr>
<tr>
<td>Job Retention Support - Other</td>
<td>Basic Plan Item</td>
<td></td>
</tr>
<tr>
<td>Job Retention Support - Referrals to Wraparound Supports</td>
<td>Basic Plan Item</td>
<td></td>
</tr>
<tr>
<td>Re-Employment Service - Job Matching Within Sector</td>
<td>Basic Plan Item</td>
<td></td>
</tr>
<tr>
<td>Re-Employment Services - Other</td>
<td>Basic Plan Item</td>
<td></td>
</tr>
<tr>
<td>Re-Employment Services - Referral Outside Sector</td>
<td>Basic Plan Item</td>
<td></td>
</tr>
</tbody>
</table>

Click the box next to the appropriate plan item and then click Continue.
### 8.7.9 Close Service Plan

- If you close a service plan, it cannot be reopened.

- If the **Owner** of the service plan is no longer an active user, they will be forced to change the **Owner** to an active CaMS user.
If the **Closure Reason** is “Completion”, the following conditions will apply:

- At least 1 sub-goal must have an outcome of ‘Attained’.

For SAO Phase 2, service providers are required to offer follow-up services to participants for a one year period after the start of employment. While a service plan can be closed after the client has found employment, it is recommended the service plan remain open for the entire duration of the one year following the start of employment.

**Prerequisite**

A service plan can be closed when its **Status** is “Active”, and all plan items and sub-goals have outcomes saved; or it has not been activated and has a closure reason of “Opened in Error, “Client Deceased”, or “Service Provider Closed”.

**System Steps**

1. Step 1: Service Plan Home Page
   
   From the **Action** Button, click CLOSE.

2. Step 2: Close Service Plan Page
   
   Complete the **Reason** and **Outcome**. The current case owner will default as the service plan **Reviewer**. Click SAVE.
The **Closure Reason** cannot be changed once the service plan has been closed with a reason of ‘Opened in Error’.

If **Comments** need to be added related to the closure reason, this can be inputted into the Change Closure Details page, which can be found in the Action Button on the Service Plan Home page.

☞ **Step 3: Close Service Plan Page**
Click YES to close the service plan.
8.7.10 SAO Phase 2 Customer Satisfaction Survey Pod

The **SAO Phase 2 Customer Satisfaction Survey** notification pod on **Workspace** will list SAO Service Plans with plan items requiring the survey follow-up as per case.

System Steps

If you wish to be taken to client’s Personal Record page, click on the name of the client.
Step One: To be taken to the SAO Phase 2 Service Plan in order to complete the Satisfaction Survey, click on the Case Reference or Due Take link.

Step Two: Use the toggle to expand the **Job Matching and Placement** sub-goal.

<table>
<thead>
<tr>
<th>Name of Sub-Goal</th>
<th>Start Date</th>
<th>End Date</th>
<th>Status</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client Service Planning and Coordination</td>
<td>20/09/2018</td>
<td>20/09/2018</td>
<td>Not Started</td>
<td></td>
</tr>
<tr>
<td>Job Matching and Placement</td>
<td>26/02/2018</td>
<td>11/06/2018</td>
<td>Completed</td>
<td>Attained</td>
</tr>
<tr>
<td>Essential and Technical Skills</td>
<td>20/09/2018</td>
<td>20/09/2018</td>
<td>Completed</td>
<td>Attained</td>
</tr>
<tr>
<td>Pre-Employment Services</td>
<td></td>
<td></td>
<td>Not Started</td>
<td></td>
</tr>
</tbody>
</table>

Step Three: Click on the Action Button for the appropriate plan item (**Job Placement-General, Referred to Employment, Referred to Union Hiring Hall, or Registered as an Apprentice**) and selected Edit Plan Item.
**Step Four:** Use the client’s response to complete the Customer Satisfaction panel. Then Click Save.
Once the survey is completed, the client will no longer appear on the pod.

⚠️ For help using pods, see EOIS CaMS – Chapter 2 – Navigation and Search
8.8 Appendix 1: Terms

8.8.1 Plan Item Cost

An estimated and actual cost can be maintained for a plan item. The estimated cost is the cost an organization expects to pay for the delivery of a service associated with a specific type of service plan item. The actual cost of a plan item is the amount paid by an organization to deliver the service associated with the plan item.

8.8.2 Expected Outcome

An expected outcome is the desired result of a plan item activity. For example, the expected outcome of a Placement with Incentive could be Employment. As part of the outcome-based approach to service planning, at least one expected outcome must be selected for each plan item.

8.8.3 Good Cause

Good cause is an acceptable reason why a plan participant did not achieve the expected outcome of a plan item (e.g., “Certified Illness”).

8.8.4 Service Plan Status

There are three types of service plan statuses: service plan status, plan summary status, and plan item status. Service plan and contract status are used to measure the status of the plan and the level of agreement between the organization and the client. Plan item status, on the other hand, is used to track the actual progress of activities within the plan. All three of the statuses change throughout the delivery of a service plan.

The following is a description of each service plan status:

Open – the status is “open” when a service plan is created.

Submitted – the status is “submitted” when the service plan is submitted for approval and is not automatically approved.

Approved – the status is “approved” when it is approved automatically or by an authorized user. If the service plan is rejected, the status returns to “open.”

Active – the status is “active” when a contract has been issued in respect of the service plan and accepted by the plan participant.

Closed – the status is “closed” when the service plan is manually closed by an authorized user.
8.8.5 Plan Summary Status

A plan summary has a status of “issued” when first created. A plan summary with this status is pending agreement between the relevant parties. The outcome of this agreement will change the plan summary status, and potentially the service plan status. A plan summary can either be “Accepted,” “Rejected,” or “Cancelled.” If rejected or cancelled, the service plan status is unaffected. If accepted, however, the service plan status becomes “active.”

8.8.6 Plan Item Status

A plan item’s status changes as the plan item progresses. Plan items which have been configured to require approval will pass through additional stages as part of this approval process. The following is a description of each plan item status:

Unapproved – used when plan items requiring approval are added to a service plan.

Submitted – used when an unapproved plan item is submitted for approval.

Not Started – used before a plan item is activated. Plan items which do not require approval will have a status of 'Not Started' when first created. Plan items requiring approval will have this status after they have been approved.

In Progress – used when an actual start date is recorded. Once in progress, the plan item is considered activated.

Completed – used when an actual end date is recorded.

8.8.7 Service Plan Outcomes

Service planning allows organizations to assign outcomes to service plans and service plan elements. The process of assigning outcomes starts with the recording of an expected outcome for each plan item. On completion of that plan item, an actual outcome of “attained,” “not attained,” or “cancelled” is recorded. Once an actual outcome has been recorded for each plan item, the outcome for the related sub-goal(s) can then be entered.

The service plan outcome is recorded when the outcomes for all sub-goals have been entered. This outcome defines whether or not the desired outcome of the service plan has been attained.
8.8.8 Service Plan Closure

A service plan is usually closed once all activities have been completed, but it can be closed at any time during its delivery. A closed service plan can still be accessed from the integrated case to which it was added.

8.8.9 Cost

Tracking the cost of a product or service is an essential part of service plan management. Plan item cost can be derived from the actual cost of delivering a plan item as entered by a caseworker.

A cost statement can be generated at any stage of the service plan delivery. It displays all estimated and actual costs involved in the delivery of a service plan at the time the statement is created. The expandable tree structured featured in the Tracking Gantt is also featured in the cost statement. For each element, the statement provides an estimated and actual cost, which allows for the comparison of these costs. The costs of the sub-goals, plan groups, and the overall plan are derived from the accumulated cost of the individual plan items.
8.9 Appendix 2: Sub-Goals and Plan Items

8.9.1 Client Service Planning and Coordination

Employment services that are not sector specific are available for both jobseekers and incumbent workers. These activities would be non-sector specific activities the client undertakes.

- Custom Basic Plan Item
- Arrange Housing
- Attend Job Interview
- Attend Workshop
- Career Assessment
- Compile Portfolio
- Complete Resume
- Conduct Cold Calls
- Evaluate Foreign Credentials
- Job Application Preparation
- Network
- Obtain References
- Prepare for Interview
- Prior Learning Assessment
- Research for Employers
- Research Occupations
- Support for Disclosure of Disabilities

8.9.2 Pre-Employment Services

- Service providers may need to delivery sector-focused pre-employment services to prepare worker for employment or advancement in the identified sector. Activities related to employability skills (i.e. job attainment skills, personal attitude/behavioural management) would be under the Pre-Employment Services sub-goal. Activities related to sector-focused career planning and management skills would also be under the Pre-Employment Services sub-goal. Career Development/Exploration – Custom Basic Plan Item
  - Career Development/Exploration – Discovering Educational and Career Paths for a Selected Occupation
  - Career Development/Exploration – Interests, Aptitudes and Abilities to Appropriate Jobs
  - Career Development/Exploration – Lifestyle Goals and Relate to Selected Occupations
• Career Development/Exploration – Selecting an Immediate Job Goal
• Career Development/Exploration – Understanding the Conditions and Specification of Jobs
• Career Development/Exploration – Vocational Interests, Aptitude and Abilities Exploration
• Employment Related Skills – Custom Basic Plan Item
• Employment Related Skills – Culture of the Organization/Business, Connecting Socially at Work, Fitting In
• Employment Related Skills – Customer Service
• Employment Related Skills – Dealing with Authority, Conflict Resolution
• Employment Related Skills – Dress for Success
• Employment Related Skills – Employment Standards, and Occupational Health and Safety
• Employment Related Skills – Team Work
• Employment Related Skills – Time Management
• Fundamental Job Readiness Skills – Custom Basic Plan Item
• Fundamental Job Readiness Skills – Communication for Workplaces
• Fundamental Job Readiness Skills – Creative Thinking to Resolve Workplace Issues
• Fundamental Job Readiness Skills – Information Management and Organization
• Fundamental Job Readiness Skills – Problem Solving at Work
• Job Attainment Skills – Custom Basic Plan Item
• Job Attainment Skills – Complete Job Application Forms
• Job Attainment Skills – Conducting a Job Search
• Job Attainment Skills – Constructing a Resume
• Job Attainment Skills – Job and Information Interview Skills and Practice
• Job Attainment Skills – Online Applications and Web-Based Job Search
• Job Maintenance and Career Advancement Skills – Custom Basic Plan Item
• Job Maintenance and Career Advancement Skills – Career Advancement Strategies
• Job Maintenance and Career Advancement Skills – Leadership Development
• Job Maintenance and Career Advancement Skills – Professional Networking
• Job Shadow
• Personal Management (Life) Skills – Custom Basic Plan Item
• Personal Management (Life) Skills – Budgeting
• Personal Management (Life) Skills – Flexibility and Adaptability on the Job
• Personal Management (Life) Skills – Healthy Work-Life Balance
• Personal Management (Life) Skills – Plan and Set Professional Learning Goals
8.9.3 Essential and Technical Skills

This sub-goal integrates essential and technical skills training that is required to enter the jobs for which vacancies and/or advancement opportunities have been identified. This sub-goal would also include any workplace safety training (including certification) required. These plan items are intended to be short in duration and should last no longer than 6 months and lead to an industry-related credential/certificate of completion.

- Skills Enhancement Training – Custom Basic Plan Item
- Skills Enhancement Training – Communications – Business Specific
- Skills Enhancement Training – Communications – Conflict Resolution/Negotiation
- Skills Enhancement Training – Communications – General Written/Oral
- Skills Enhancement Training – Communications – Networking
- Skills Enhancement Training – Communications – Public Speaking and Presentation
- Skills Enhancement Training – Communications – Technical Specific
- Skills Enhancement Training – Essential Skills – Literacy and Numeracy On The Job
- Skills Enhancement Training – General Occupation – Administration
- Skills Enhancement Training – General Occupation – Driver’s License
- Skills Enhancement Training – General Occupation – Fitness and Recreation
- Skills Enhancement Training – General Occupation – Hospitality
- Skills Enhancement Training – General Occupation – Human Resources
- Skills Enhancement Training – General Occupation – Retail Sales
- Skills Enhancement Training – General Occupation – Security Services
- Skills Enhancement Training – General Occupation – Warehouse and Logistics
- Skills Enhancement Training – Health and Safety – Driver’s Training up to G
- Skills Enhancement Training – Health and Safety – Falls Protections
- Skills Enhancement Training – Health and Safety – First Aid
- Skills Enhancement Training – Health and Safety – Food Handlers Certificate
- Skills Enhancement Training – Health and Safety – General
- Skills Enhancement Training – Health and Safety – Smart Serve
- Skills Enhancement Training – Personal/Business Skills – Critical Thinking
• Skills Enhancement Training – Personal/Business Skills – Customer Service
• Skills Enhancement Training – Personal/Business Skills – Information Management
• Skills Enhancement Training – Personal/Business Skills – Leadership Training
• Skills Enhancement Training – Personal/Business Skills – Risk Assessment/Management
• Skills Enhancement Training – Personal/Business Skills – Sales and Marketing
• Skills Enhancement Training – Sector Specific – Agriculture
• Skills Enhancement Training – Sector Specific – Mining, Quarrying, and Oil and Gas Extraction
• Skills Enhancement Training – Sector Specific – Utilities
• Skills Enhancement Training – Sector Specific – Construction
• Skills Enhancement Training – Sector Specific – Manufacturing
• Skills Enhancement Training – Sector Specific – Wholesale Trade
• Skills Enhancement Training – Sector Specific – Retail Trade
• Skills Enhancement Training – Sector Specific – Transportation and Warehousing
• Skills Enhancement Training – Sector Specific – Information and Cultural Industries
• Skills Enhancement Training – Sector Specific – Finance and Insurance
• Skills Enhancement Training – Sector Specific – Real Estate and Rental and Leasing
• Skills Enhancement Training – Sector Specific – Professional, Scientific and Technical Services
• Skills Enhancement Training – Sector Specific – Management of Companies and Enterprises
• Skills Enhancement Training – Sector Specific – Administrative and Support, Waste Management and Remediation Services
• Skills Enhancement Training – Sector Specific – Education Services
• Skills Enhancement Training – Sector Specific – Health Care and Social Assistance
• Skills Enhancement Training – Sector Specific – Arts, Entertainment and Recreation
• Skills Enhancement Training – Sector Specific – Accommodation and Food Services
• Skills Enhancement Training – Sector Specific – Other Services (expect public administration)
• Skills Enhancement Training – Technology – Databases and Data Processing
• Skills Enhancement Training – Technology – General Computer Literacy
• Skills Enhancement Training – Technology – Social Media
• Skills Enhancement Training – Technology – Visual Presentations
• Skills Enhancement Training – Technology – Word Processing

8.9.4 Job Matching and Placement
This sub-goal and the associated plan items are to be used in association of a client’s job placement. This includes the job placement itself, financial support being flowed to the client or employer to overcome barriers to participation in the placement, any mentoring or workshop activities the client is undertaking while in the placement to support the successful completion, and/or if the client has been registered as an apprentice, found employment outside of a placement, or been referred to a union hiring hall.

- Assessment of Workplace Capacity – Initial Site Visit
- Custom Basic Plan item
- Job Coaching Support – Issues Resolution
- Job Coaching Support – Training
- Job Coaching Support – Monitoring
- Job Placement – General
- Supports for Employers – Lost Productivity Due to Mentorship
- Support for Employers – Paid Release Time for Additional Services
- Supports for Individual – Academic Assessment
- Supports for Individual – Certification Charges
- Supports for Individual – Child Care
- Supports for Individual – Clothing
- Supports for Individual – Employer Specific Assessments
- Supports for Individual – Language Assessment
- Supports for Individual – Special Equipment
- Supports for Individual – Translation of Academic Documents
- Supports for Individual – Transportation
- Supports for Individual – Workplace Accommodation Needs
- Supports for Individual – Other
- Referred to Employment
- Referred to Union Hiring Hall
- Registered as Apprentice
- Job Placement Stipend

8.9.5 Post-Employment Services

Post-employment or retention services are offered upon completion of a sub-goal, to ensure that jobseekers and incumbent workers are supported to succeed and advance in employment. This service component is available to both individuals and employers for one year following participating in SAO Phase 2, to mitigate potential risks to post-placement success and referrals to wraparound supports.
• Career Management Assistance – Career Counselling
• Career Management Assistance – Career Planning
• Career Management Assistance – Other
• Job Retention Support – Issues Resolution
• Job Retention Support - Monitoring
• Job Retention Support – Referrals to Wraparound Supports
• Job Retention Support – Other
• Re-Employment Services – Job Matching Within Sector
• Re-Employment Services – Referral Outside Sector
• Re-Employment Services – Other

8.9.6 Referral to Other Program and Services

• Credential Assessment
• Custom Basic Plan Item
• EO – Action Centre
• EO – Apprenticeship Program – Co-op Diploma Apprenticeship Program
• EO – Apprenticeship Program – Other
• EO – Apprenticeship Program – Pre-Apprenticeship Program
• EO – Employment Service Provider
• EO – Literacy and Basic Skills Services Provider
• EO – RRTS
• EO – Service Provider – Other
• EO – Youth Job Connection Service Provider
• EO – Youth Job Connection Summer Service Provider
• EO – Youth Job Link Provider
• EO – Local Boards
• EO – Ontario Job Bank
• General Education Development
• Government Services Municipal
• Government Training Federal – Other
• Government Training Federal – Youth Employment Strategy
• Government Training Provincial – Other
• High School
• Independent Learning Centre
• Language Services – Training
• Ministry of Citizenship and Immigration – Bridge Training for immigrants
• Ministry of Citizenship and Immigration – Other
• Ontario Disability Support Program
• Ontario Internship Program
• Ontario Women’s Directorate
• Ontario Works
• Other – Structured/ Formal Referral
• Post-Secondary Education
• School Boards
• Service Canada
• Services for Indigenous People
• Youth Development Leadership Supports/Services

8.9.7 Referral to Ministry Delivered Programs

• Referral to Feepayer
• Referral to Job Creation Partnership
• Referral to Second Career

8.9.8 Referral Out to Other Community Resources

• Child Care
• Educational/Academic Services
• Financial Planning
• Health/Counselling Services
• Housing Services
• Language Services – Assessment
• Legal Services
• Newcomer Services
• Regulatory Bodies