Chapter 8G: Canada-Ontario Job Grant Cloning Functionality
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<th>Date</th>
<th>Description</th>
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<tr>
<td>1.0</td>
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| 1.1       | October 2017 | Updates to:  
• 1.3.2 Participant No Show  
Added:  
• 1.3.3 Participant No Show with Training Cost and Total Cost Adjusted  
• 1.3.4 Verified Unemployed |
| 1.2       | December 2017| Updates to reflect Release 17.4:  
• Bulk Print Plan Summary |
| 1.3       | September 2018| Update screenshots re Curam v7 Upgrade |
| 1.4       | February 2019| Update screenshots to reflect new fields in EO profile and client summary |
8.1 Introduction

The purpose of this guide is to provide service provider staff with step-by-step instructions on how to clone participant training information from a plan item, and how to use the bulk functionality.

8.2 Process Changes

The following process changes apply to the employer service plan.

- Copy Training Information (Bulk Update)
- Bulk Approve
- Bulk Create Plan Summary
- Bulk Accept/Activate
- Bulk Print Plan Summary
- Bulk Close

In order for cloning to be successful, the following must be met:

- register participants as per usual
- a COJG application is linked to the COJG employer
- participant service plans are linked to the Employer service plan
- complete client summary for non-verified unemployed participants (*for verified unemployed participants, client summaries are handled differently. Refer to scenario 4 as an example).
8.2.1 Copy Training Information

The Copy Training Information functionality allows the user to select a participant service plan as a “template”. The service plan will consist of the training information already entered. The template is then used to copy the training information into one or more participant service plans within the same training group. Only the training information will be copied and not the client summary. This process will save time as it requires the user to enter training details only once.

Existing linked participant service plans: The cloning process will not work if there are existing participant service plans already linked to the employer in “Active” status. The service plan must be in “Open” status.

System Steps

➤ Step 1: COJG Participant Service Plan Home Page

Choose a trainee (participant service plan) and follow the same process for adding sub-goals and plan items. Ensure all required fields for the plan item are completed, including the Expected Start Date, Expected End Date and Estimated Total Cost. This service plan will be used as the “template” for copying purposes.

➤ Step 2: COJG Employer Service Plan Home Page

Navigate to the employer’s service plan. From the Action Button, select COPY TRAINING INFORMATION.

Step 3: Select Template Plan Page
A template is a service plan selected by the user to copy training information to other service plans. A list of participant service plans are displayed in two groups: “Valid Templates” and “Invalid Templates”.

Valid Templates: service plans with a non-closed status and at least one non-cancelled plan item are eligible to be used as templates.

Invalid Templates: service plans not eligible to be used as templates and cannot be selected, such as a closed service plan.

Under “Valid Templates”, select the service plan that contains the training information, and click NEXT.

To save some time, use the drop-down menu to filter by Group Name if there are more than one groups linked to the employer. After the FILTER button is clicked, notice that the service plans associated with the group name are automatically selected.

Click the Select All checkbox to select all the cases in the list, or select them individually. Click NEXT.
Step 5: Clone Plan Items Page

A summary of service plans that were selected as “targets” to be updated with the training information are displayed. It is mandatory to create a **Group Name**. The name should be unique and meaningful to the training group. For example, “Welding101 - June 15”.

Review the list to ensure it is complete and click COPY TRAINING INFORMATION.

Step 6: Result of Copy Training Information Page

The copy training information was successfully completed
The training group service plans have been updated with identical training information. The following actions have occurred:

- an event log entry in the participant service plan’s recent changes tab was created
- service plans have been recorded on the COJG employer home page
- service plans are linked to the new group name

8.2.2 Bulk Approve Participant Service Plans

The Bulk Approve functionality allows the user to approve a group of participant service plans at the same time. This process will save time as it requires the user to go through the approval process once. Once approved, the participant service plans will change to “Approved” status.

Prerequisite

The existing validation rules apply when approving service plans.

System Steps

- Step 1: COJG Employer Service Plan Home Page
Navigate to the Employer's service plan. Click the REFRESH button to refresh the data on the page and ensure the user is viewing the most up to date information. From the Action Button, select BULK APPROVE PARTICIPANT PLANS.

Step 2: Select Plans for Bulk Approval Page

A list of participant service plans are displayed in two groups: “Valid Plans” and “Invalid Plans”. Valid Plans: contains eligible service plans that meet the existing rules to be approved. Invalid Plans: contains service plans which are not eligible for approval and cannot be selected, such as client deceased.

Use the drop-down menu to filter by Group Name and then click FILTER. Service plans will automatically be selected. Alternatively, click the Select All checkbox to select all the cases in the list, or select them individually. Click NEXT.
Step 3: Confirm Plans for Approval Page

A summary of the service plans selected for approval are displayed. Ensure the list is correct, and click APPROVE.

![Confirm Plans for Approval](image)

Step 4: Result of Bulk Approval Page

The bulk approve was successfully completed.

The following actions have occurred:

- system sets the status of all listed plans to “Approved”
- logs the approval into the Participant Service Plan event log

8.2.3 Bulk Create Participant Plan Summary

The Bulk Create Plan Summary functionality allows the user to create a group of Plan Summaries at the same time. This process will save time as it requires the user to create the Plan Summary only once.

Pre-requisites

The existing validation rules apply when creating a plan summary.

System Steps

Step 1: COJG Employer Service Plan Home Page

Navigate to the Employer’s service plan. Click the REFRESH button to refresh the data on the page and ensure the user is viewing the most up to date information. From the **Action Button**, select BULK CREATE PARTICIPANT PLAN SUMMARY.
Step 2: Select Plans for Bulk Create Participant Plan Summary Page

A list of participant service plans are displayed in two groups: “Valid Plans” and “Invalid Plans”.

Valid Plans: eligible service plans that meet the existing rules to create a plan summary will appear.

Invalid Plan: contains service plans which are not eligible for plan summary creation and cannot be selected, such as an open service plan.

Use the drop-down menu to filter by Group Name and then click FILTER. Service plans will automatically be selected. Alternatively, click the Select All checkbox to select all the cases in the list, or select them individually. Click NEXT.
Step 3: Bulk Create Participant Plan Summary Page

A summary of the service plans selected for bulk create plan summary are displayed. Ensure the list is correct, and click BULK CREATE PLAN SUMMARY.

Step 4: Result of Bulk Create Participant Plan Summary Page

The bulk create participant plan summary was successfully created.

8.2.4 Bulk Accept/Activate Participant Service Plans

The Bulk Accept/Activate functionality allows the user to accept/activate a group of participant service plans at the same time. This process will save time as it requires the user to complete the acceptance process only once. Once accepted/activated, the participant service plans will change to “Active” status and the plan summary will change to “Accepted”.
Once the bulk accept/activate is completed, it is recommended that

- the actual start and end dates, actual contributions and total cost be entered
- complete the sub goal

Prerequisites

The existing validation rules when accepting/activating a service plan apply here

System Steps

❖ Step 1: COJG Employer Service Plan Home Page

Navigate to the Employer’s service plan. Click the REFRESH button to refresh the data on the page and ensure the user is viewing the most up to date information. From the **Action Button**, select **BULK ACCEPT PARTICIPANT PLANS**.

❖ Step 2: Select Plans for Bulk Acceptance Page

A list of participant service plans are displayed in two groups: “Valid Plans” and “Invalid Plans”.

Valid Plans: contains eligible service plans that meet the existing criteria to accept will appear.

Invalid Plans: contains service plans which are not eligible to be accepted and cannot be selected, such as no plan summary.

Use the drop-down menu to filter by **Group Name** and then click **FILTER**. Service plans will automatically be selected. Alternatively, click the **Select All** checkbox to select all the cases in the list, or select them individually. Click **NEXT**.
Step 3: Bulk Accept Plans Page

A summary of the service plans selected for bulk accept are displayed. The Date Accepted is mandatory and must be entered. Ensure the list is correct, and click BULK ACCEPT PLANS.

Step 4: Bulk Accept Result Page

The bulk accept/activate was successfully completed.

The following actions have occurred:

- system updates the date accepted for all selected plans
- system sets the plan summary and service plan statuses to “Accepted” for all plans
8.2.5 Bulk Print Participant Plan Summary

The Bulk Print Participant Plan Summary functionality allows the user to download and print a group of Plan Summaries at the same time. This process will save time as it requires the user to print the Plan Summary only once.

Pre-requisites

The existing validation rules apply when printing a plan summary.

System Steps

✦ Step 1: COJG Employer Service Plan Home Page

Navigate to the Employer’s service plan. Click the REFRESH button to refresh the data on the page and ensure the user is viewing the most up to date information. From the Action Button, select BULK DOWNLOAD PARTICIPANT PLAN.

✦ Step 2: Select Plans for Bulk Download Participant Plan Page

A list of participant service plans are displayed in two groups: “Valid Plans” and “Invalid Plans”.

Valid Plans: contains eligible service plans that meet the existing criteria to print will appear.

Invalid Plans: contains service plans which are not eligible to be printed and cannot be selected, such as no plan summary.
Use the drop-down menu to filter by **Group Name** and then click FILTER. Service plans will automatically be selected. Alternatively, click the **Select All** checkbox to select all the cases in the list, or select them individually. Click NEXT.

**Step 3: Confirm Plans for Bulk Download Participant Plan Page**

To print the plan summary, select BULK DOWNLOAD PLAN IN ENGLISH or BULK DOWNLOAD PLAN IN FRENCH (depending on the language the client prefers) from the **Action Button**.

The system generates a PDF file containing the selected plan summaries. A file download pop-up will appear. Click OPEN or SAVE.

The following action occurred:

- system logs the Download Date and Requested By information into the History log

**8.2.6 Bulk Close Participant Service Plans**
The Bulk Close functionality allows the user to close a group of participant service plans at the same time. This process will save time as it requires the user to complete the close process only once. Once the participant service plan is closed, the status will change to “Closed”.

Prerequisites

- actual start and end dates, actual contributions, and total cost have been entered for one participant service plan
- repeat the copy training information process to copy the actuals into the target plans (the service plan that was updated with the actual details will be identified with an exclamation mark)
- complete the sub goal and enter the outcome for the same participant
- existing validation rules apply when closing a service plan

System Steps

☞ Step 1: COJG Employer Service Plan Home Page

Select BULK CLOSE PARTICIPANT PLANS from the Action Button.

☞ Step 2: Select Plans for Bulk Close Page

A list of participant service plans are displayed in two groups: “Valid Plans” and “Invalid Plans”.

Valid Plans: contains eligible service plans that meet the existing criteria to close will appear.
Invalid Plans: contains service plans which are not eligible to be closed and cannot be selected, such as a closed service plan.

An exclamation mark is a flag to indicate that the service plan has been modified and is different from the rest of the group. If the exclamation mark does not appear, click the REFRESH button.

Use the drop-down menu to filter by Group Name and then click FILTER. Service plans will automatically be selected. Alternatively, click the Select All checkbox to select all the cases in the list, or select them individually. Click NEXT.

Step 3: Bulk Close Participant Plans Page

A summary of the service plans selected for bulk closure are displayed. The Reason and Outcome are mandatory fields and must be entered. Ensure the list is correct, and click BULK CLOSE.
Step 4: Bulk Close Result Page

The bulk closure was successfully completed.

8.3 Scenarios

8.3.1 Scenario 1: Happy Path

An employer requires four trainees to attend a one day course to be delivered on-site. No travel cost is required.

Pre-requisites

- four participants have been registered in EOIS-CaMS
- participant’s client summary completed
- service plans have been linked to employer
- one service plan has the training information entered

The first step is to update the participant service plans by copying the training information.

System Steps

Step 1: COJG Employer Service Plan Home Page

Select COPY TRAINING INFORMATION from the Action Button.
Step 2: Select Template Plan Page

From the “Valid Templates” group, select the service plan with the training information previously entered. Click NEXT.

Step 3: Select Target Plans Page

Click the Select All checkbox or select the service plans individually. Click NEXT.
 Ez Step 4: Clone Plan Items Page
Create a Group Name for the training group. Review the list to ensure it is complete, and click COPY TRAINING INFORMATION.

![Clone Plan Items](image)

Ez Step 5: Result of Copy Training Information Page
The copy training information was successfully completed.

![Result of Copy Training Information](image)

The next step is to bulk approve the participant service plans.

System Steps
Ez Step 6: COJG Employer Service Plan Home Page
Select BULK APPROVE PARTICIPANT PLANS from the Action Button.

![COJG Employer Service Plan Home Page](image)
Step 7: Select Plans for Bulk Approval Page

A list of eligible service plans for approval will appear under the “Valid Plans” group. Filter by Group Name or click the Select All checkbox, and then click NEXT.

Step 8: Confirm Plans for Approval Page

A summary of the service plans selected for approval are displayed. Ensure the list is correct, and click APPROVE.

Step 9: Result of Bulk Approval Page

The bulk approve was successfully completed.

The next step is to bulk create the participant plan summary.

System Steps

Step 10: COJG Employer Service Plan Home Page
Select BULK CREATE PARTICIPANT PLAN SUMMARY from the **Action Button**.

**Step 11: Select Plans for Bulk Create Participant Plan Summary Page**

A list of service plans eligible for plan summary creation will appear under the “Valid Plans” group. Filter by **Group Name** or click the **Select All** checkbox, and then click NEXT.

**Step 12: Bulk Create Participant Plan Summary Page**
A summary of the service plans selected for bulk creation of plan summary are displayed. Ensure the list is correct, and click BULK CREATE PLAN SUMMARY.

**Step 13: Result of Bulk Create Participant Plan Summary Page**

The bulk create plan summary was successfully completed.

The next step is to bulk accept/activate participant plan.

**System Steps**

**Step 14: COJG Employer Service Plan Home Page**

Select BULK ACCEPT PARTICIPANT PLANS from the **Action Button**.

**Step 15: Select Plans for Bulk Acceptance Page**
A list of service plans that are eligible to be accepted will appear under the “Valid Plans” group. Use the Group Name drop-down menu to select the group, or click the Select All checkbox. Click NEXT.

_pressed Step 16: Bulk Accept Plans Page

A summary of the service plans selected for bulk accept are displayed. The Date Accepted is mandatory and must be entered. Ensure the list is correct, and click BULK ACCEPT PLANS.

_pressed Step 17: Bulk Accept Result Page

The Bulk Accept was successfully completed.

Service Provider receives confirmation from the employer that all four participants have completed the one day training. Next step is to update a service plan with the actual start date, actual end date and actual training cost using the copy training information process. Make sure the sub goal is completed. Any participant service plan in the training group can be selected as the template.

System Steps

_pressed Step 18: COJG Participant Service Plan Home Page
Navigate to the participant’s service plan and click the **Plan Content** tab. Click **EDIT PLAN ITEM** from the **Action Button**. Enter the **Actual Start Date**, **Actual End Date**, **Actual Training Cost**, and any other mandatory information. Ensure the sub-goal is completed.

Complete the remaining Copy Training Information steps as mentioned above.

As the training lasted one day and everyone completed the training, all service plans need to be closed. The next step is to bulk close participant service plans.

**System Steps**

- **Step 19: COJG Employer Service Plan Home Page**
  
  Select **BULK CLOSE PARTICIPANT PLANS** from the **Action Button**.

- **Step 20: Select Plans for Bulk Close Page**
  
  A list of service plans that are eligible to be closed will appear under the “Valid Plans” group. Select the service plans to be closed using the **Group Name** filter or **Select All** checkbox. Click **NEXT**.
Step 21: Bulk Close Participant Plans Page

A summary of the service plans selected for bulk closure are displayed. The Reason and Outcome are mandatory and must be entered. Ensure the list is correct, and click BULK CLOSE.

Step 22: Bulk Close Result Page

The bulk close was successfully completed.
8.3.2 Scenario 2: Participant No Show

An employer requires six trainees to attend a one day course at a cost of $51,725.82 for the training session. Before training begins, two trainees are no show. Training will be delivered on-site. No travel cost is required.

Pre-requisites

- six participants have been registered in EOIS-CaMS
- participant’s client summary completed
- service plans have been linked to employer
- one participant has the training information entered

Calculation

Employer client summary

Participant service plan

- Employer Cash Contribution / # of participants = Estimated Employer Cash Contribution
  
  25,862.91 / 6 = 4310.485 round up to 4310.49

- Total Cost of Training / # of participants = Estimated Total Cost
  
  51,725.82 / 6 = 8,620.97
The first step is to update the participant service plans by copying the training information.

System Steps

🎉 Step 1: COJG Employer Service Plan Home Page
Select COPY TRAINING INFORMATION from the Action Button.

🎉 Step 2: Select Template Plan Page
Select the service plan with the training information previously entered. Click NEXT.
Step 3: Select Target Plans Page
Select the service plans to clone and click NEXT.

Step 4: Clone Plan Items Page
Create a **Group Name** for the training group. Review the list to ensure it is complete, and click COPY TRAINING INFORMATION.
Step 5: Result of Copy Training Information Page

The copy training information was successfully completed.

The next step is to bulk approve the participant service plans.

System Steps

Step 6: COJG Employer Service Plan Home Page

Select BULK APPROVE PARTICIPANT PLANS from the **Action Button**.

Step 7: Select Plans for Bulk Approval Page

Select the appropriate service plans and click NEXT.
**Select Plans for Bulk Approval**

Filter By Group Name

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<th>Group Name</th>
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<tr>
<td>All Stars Team - Nov 16</td>
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**Valid Plans (Number of items: 2)**

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<td>XHELW5365</td>
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<td>Open</td>
<td>Client is not identified as eligible/unemployed/New Hire</td>
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<td>XHELW5185</td>
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**Invalid Plans (Number of items: 0)**

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<th>Group Name</th>
<th>Status</th>
<th>Other Info</th>
</tr>
</thead>
</table>
Step 8: Confirm Plans for Approval Page
Ensure the list is correct, and click APPROVE.

Step 9: Result of Bulk Approval Page
The bulk approve was successfully completed.

The next step is to bulk create the participant plan summary.

System Steps

Step 10: COJG Employer Service Plan Home Page
Select BULK CREATE PARTICIPANT PLAN SUMMARY from the Action Button.
Step 11: Select Plans for Bulk Create Participant Plan Summary Page
Select the appropriate service plans and then click NEXT.

Step 12: Bulk Create Participant Plan Summary Page
Ensure the list is correct, and click BULK CREATE PLAN SUMMARY.

Step 13: Result of Bulk Create Participant Plan Summary Page
The bulk create plan summary was successfully completed.
The next step is to bulk accept/activate participant plan.

System Steps

✦ Step 14: COJG Employer Service Plan Home Page

Select BULK ACCEPT PARTICIPANT PLANS from the **Action Button**.

✦ Step 15: Select Plans for Bulk Acceptance Page

Select the appropriate service plans and click NEXT.

✦ Step 16: Bulk Accept Plans Page

The **Date Accepted** is mandatory and must be entered. Ensure the list is correct, and click BULK ACCEPT PLANS.
Step 17: Bulk Accept Results Page

The Bulk Accept was successfully completed.

In this scenario, the total training cost has been paid to the training provider. Select a service plan as the template and complete the plan item.

System Steps

Step 18: COJG Participant Service Plan Home Page

Navigate to the participant’s service plan and click the Plan Content tab. Click EDIT PLAN ITEM from the Action Button. Enter the Actual Start Date, Actual End Date, Actual Training Cost, and any other mandatory information. Ensure the sub-goal is completed.

Complete the COPY TRAINING INFORMATION for all participants.
On the last day of training, all service plans must be closed. The service provider receives confirmation from the employer that four trainees attended training and two were no shows. For the no shows, the sub-goal and plan item outcome must be changed to “Not Attained.”

System Steps

✦ Step 19: COJG Participant Service Plan Home Page

Select COPY TRAINING INFORMATION from the Action Button.
**Step 20: Select Template Plan Page**

Select the service plan with the training information previously entered. Click NEXT.

**Step 21: Select Target Plans Page**

Select the service plans to clone and click NEXT.

**Step 22: Clone Plan Items Page**

Create a new **Group Name** for the no shows, and click COPY TRAINING INFORMATION.
Step 23: Result of Copy Training Information Page

The copy training information was successfully completed.

The next step is to bulk close the two no shows participant service plans.

System Steps

Step 24: COJG Employer Service Plan Home Page

Select BULK CLOSE PARTICIPANT PLANS from the Action Button.
❖ Step 25: Select Plans for Bulk Close Page

Select the service plans to close and click NEXT.

❖ Step 26: Bulk Close Participant Plans Page

The Reason and Outcome are mandatory and must be entered. Ensure the list is correct, and click BULK CLOSE.
Step 27: Bulk Close Result Page

The bulk close was successfully completed.

Final step is to close the remaining participant service plans.

System Steps

Step 28: COJG Employer Service Plan Home Page
Select BULK CLOSE PARTICIPANT PLANS from the Action Button.
Step 29: Select Plans for Bulk Close Page

Select the service plans to close and click NEXT.
Step 30: Bulk Close Participant Plans Page

The **Reason** and **Outcome** are mandatory and must be entered. Ensure the list is correct, and click BULK CLOSE.

Step 31: Bulk Close Result Page

The bulk close was successfully completed.
## Service Plan Home

**COUG Program Type:** COUG  
**Service Delivery Site:** YMCA of Greater Toronto - North York - 202-4400 DUFFERIN ST (Change Service Delivery Site)  
**Goal:** Enhance skills  
**Start Date:** 29/1/2018  
**COUG Application Number:** 18486392774  
**Plan Reference Number:** 587332

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<th>End Date</th>
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## Participant Service Plans

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<td>4,310.49</td>
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</tr>
</tbody>
</table>

**Total:** 8,620.98 8,620.98 8,620.98 8,620.98
8.3.3 Scenario 3: Participant No Show with Training Cost and Total Cost Adjusted

An employer requires 11 trainees to attend a one day course. Total cost of training is $66,000.00. Training cost and actual total cost must be adjusted to reflect the three no shows.

Pre-requisites

- Copy training information, bulk approve, bulk create plan summary, and bulk accept are completed

System Steps

✦ Step 1: COJG Participant Service Plan Home Page

Navigate to the participant’s service plan and click the Plan Content tab. Click EDIT PLAN ITEM from the Action Button. Enter the Actual Start Date, Actual End Date, Actual Training Cost, and any other mandatory information. Ensure the sub-goal is completed.

Complete the COPY TRAINING INFORMATION for all participants.

✦ Step 2: COJG Participant Service Plan Home Page

Select one participant no show and change the sub-goal to “Not Attained”. On the Modify Plan Item page, change the outcome to “Not Attained” and enter zero for the actuals.
Step 3: COJG Participant Service Plan Home Page

Select COPY TRAINING INFORMATION from the Action Button.

Step 4: Select Template Plan Page

Select the participant no show that was modified, and click NEXT.

Step 5: Select Target Plans Page

Select the service plans to clone and click NEXT.
Step 6: Clone Plan Items Page

Create a new **Group Name** for the no shows, and click COPY TRAINING INFORMATION.
Step 7: Result of Copy Training Information Page
The copy training information was successfully completed.

The next step is to bulk close the three no show participant service plans.

System Steps

Step 8: COJG Employer Service Plan Home Page
Select BULK CLOSE PARTICIPANT PLANS from the **Action Button**.

Step 9: Select Plans for Bulk Close Page
Select the service plans to close and click NEXT.
Step 10: Bulk Close Participant Plans Page

The **Reason** and **Outcome** are mandatory and must be entered. Ensure the list is correct, and click BULK CLOSE.

Step 11: Bulk Close Result Page

The bulk close was successfully completed.
Close the remaining participant service plans.

☞ Step 12: COJG Employer Service Plan Home Page

Select BULK CLOSE PARTICIPANT PLANS from the Action Button.
Step 13: Select Plans for Bulk Close Page

Select the appropriate service plans to close Click NEXT.

Step 14: Bulk Close Participant Plans Page

The **Reason** and **Outcome** are mandatory and must be entered. Ensure the list is correct, and click BULK CLOSE.
Step 15: Bulk Close Result Page
The bulk close was successfully completed.

Before closing the employer service plan, the total cost of training and employer contributions must be adjusted to reflect the number of participants who attended training.

System Steps

Step 16: COJG Employer Service Plan Home Page
Click the **Client Summary** tab.
Step 17: Trainees and Cost Page

Click EDIT.

Step 18: Modify Training Cost Page

The training cost and contributions need to be reduced based on the actual number of participants who attended training.
Revised Calculation:

- Actual Employer Cash Contribution + Actual Ministry Cash Contribution = Total Cost of Training
  \[24,000.00 + 24,000.00 = 48,000.00\]

- For reporting purposes, do not adjust the number of trainees.

- Total Cost of Training / number of participants = Training Cost
  \[\$48,000 / 11 = 4363.63\ldots\]

Click SAVE.
## Training Cost and Grant Request

<table>
<thead>
<tr>
<th>Training Cost</th>
<th>Number of Trainees (A)</th>
<th>Training Cost($) (B)</th>
<th>Total($) (A*($B-C)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuition or other training provider fees</td>
<td>11</td>
<td>4263.63/06</td>
<td>48000.00</td>
</tr>
<tr>
<td>Textbooks, software and other required materials</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Mandatory student fees</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Examination Fees</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td><strong>48000.00</strong></td>
</tr>
</tbody>
</table>

### Travel Cost

<table>
<thead>
<tr>
<th></th>
<th>Incumbents</th>
<th>New Hires</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

Note: Travel cost will be supported according to the employer’s policy up to the maximum $500 per trainee.

### Grand Total

<table>
<thead>
<tr>
<th><strong>COJG Audit Cost</strong></th>
<th>0.00</th>
</tr>
</thead>
</table>

### Contribution for Employers with 99 or fewer Employees or a Consortium

<table>
<thead>
<tr>
<th>Total Cost of Training</th>
<th>0.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employer Contribution (minimum 1/8 of Total Training Cost)</td>
<td>0.00</td>
</tr>
<tr>
<td>MTCU Contribution (maximum 5/8 of Total Training Cost or $10,000 per trainee, whichever is less)</td>
<td>0.00</td>
</tr>
</tbody>
</table>

### Contribution for Employers with 100 or more Employees or a Consortium

<table>
<thead>
<tr>
<th>Total Cost of Training</th>
<th>48000.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employer Contribution (minimum 1/2 of Total Training Cost)</td>
<td>24000.00</td>
</tr>
<tr>
<td>MTCU Contribution (maximum 1/2 of Total Training Cost or $10,000 per trainee, whichever is less)</td>
<td>24000.00</td>
</tr>
</tbody>
</table>

[Add Incumbent Information] [Add New Hire Information] [Save] [Cancel]
Scenario 4: Verified Unemployed New Hire

An employer requires seven trainees to attend training. Three of the seven is verified unemployed participant.

Pre-requisite

- Seven participants have been registered in EOIS-CaMS
- Complete client summary for participants (*do not select verified unemployed checkbox for the three participant)
- Service plans have been linked to employer

The first step is to modify the client summaries for the three Verified Unemployed trainees.

System Steps

Step 1: COJG Participant Service Plan Home Page

Search for the three participant service plans for the Verified Unemployed trainees and select **Verified Unemployed New Hire** from the client summary.
Modify Client Summary

Details

Number of Dependents *: Prefer not to disclose
Internationally Trained Professional *: No
Highest Level of Education/Qualification *: Grade 10
Credentials Not Recognized in Ontario *: Regulated Profession
Time Out of School/Work *: 3 to 6 Months

Labour Force Attachment *: Unemployed
Precarious Employment: Unknown
Source of Income *: No Source of Income
Participant Type *: New Hire

Verified Unemployed New Hire

Comments

Save Cancel
Step 2: COJG Participant Service Plan Home Page

Once the verified unemployed new hire service plans have been confirmed, a service plan must be selected as the template for cloning. Ensure all required fields for the plan item are completed, including the Expected Start Date, Expected End Date and Estimated Total Cost.

Remember: estimated total cost is the total cost of training divided by the number of participants. Estimated employer cash contribution will be zero.

Step 3: COJG Employer Service Plan Home Page

Navigate to the employer’s Service Plan Home page. Select COPY TRAINING INFORMATION from the Action Button.

Step 4: Select Template Plan Page

Select the service plan with the training information previously entered. Click NEXT.
Step 5: Select Target Plans Page
Select the service plans to clone and click NEXT.

Step 6: Clone Plan Items Page
Create a **Group Name** for the training group. Review the list to ensure it is complete, and click COPY TRAINING INFORMATION.

Step 7: Result of Copy Training Information Page
The copy training information was successfully completed.
Next, update the remaining four participant service plans by copying the training information.

System Steps

⇒ Step 8: COJG Participant Service Plan Home Page

Choose a trainee (participant service plan) and follow the same process for adding sub-goals and plan items. Ensure all required fields for the plan item are completed, including the **Expected Start Date**, **Expected End Date** and **Estimated Total Cost**. The estimated total cost is the total cost of training divided by the number of participants. Calculate the estimated employer cash contribution (1/6 of total cost of training divided by the number of participants).

For employers with over 99 employees or a consortium, the employer contribution per participant is 1/2 of the total training cost divided by the number of participants.

⇒ Step 9: COJG Employer Service Plan Home Page

Navigate to the employer’s Service Plan Home page. Select COPY TRAINING INFORMATION from the **Action Button**.

⇒ Step 10: Select Template Plan Page
Select the service plan with the training information previously entered. Click NEXT.

**Step 11: Select Target Plans Page**

Select the service plans to clone and click NEXT.
Step 12: Clone Plan Items Page
Create a **Group Name** for the training group. Review the list to ensure it is complete, and click **COPY TRAINING INFORMATION**.

Step 13: Result of Copy Training Information Page
The copy training information was successfully completed.

Step 14: COJG Employer Service Plan Home Page
Select **BULK APPROVE PARTICIPANT PLANS** from the **Action Button**.
Step 15: Select Plans for Bulk Approval Page
Select the appropriate service plans and click NEXT.

Step 16: Confirm Plans for Approval Page
Ensure the list is correct, and click APPROVE.

Step 17: Result of Bulk Approval Page
The bulk approve was successfully completed.
The next step is to bulk create the participant plan summary for all seven participants.

System Steps

✎ Step 18: COJG Employer Service Plan Home Page
Select BULK CREATE PARTICIPANT PLAN SUMMARY from the Action Button.

✎ Step 19: Select Plans for Bulk Create Participant Plan Summary Page
Select the appropriate service plans and click NEXT.
Step 20: Bulk Create Participant Plan Summary Page

Ensure the list is correct, and click BULK CREATE PLAN SUMMARY.

Step 21: Result of Bulk Create Participant Plan Summary Page

The bulk create plan summary was successfully completed.

The next step is to bulk accept/activate participant plan.

System Steps

Step 22: COJG Employer Service Plan Home Page

Select BULK ACCEPT PARTICIPANT PLANS from the Action Button.
五千岛-服务提供者用户指南

 Step 23: Select Plans for Bulk Acceptance Page
Select the appropriate service plans and click NEXT.

 Step 24: Bulk Accept Plans Page
The Date Accepted is mandatory and must be entered. Ensure the list is correct, and click BULK ACCEPT PLANS.

 Step 25: Bulk Accept Result Page
The Bulk Accept was successfully completed.
Service Provider receives confirmation from the employer that all participants have completed the training. Update the verified unemployed service plans with their actuals.

System Steps

➤ Step 26: COJG Participant Service Plan Home Page
Select a participant service plan as the template. Enter the adjusted Actual Training Cost, Actual Start Date and Actual End Date. Ensure all required fields are complete. Complete the sub-goal with an outcome.

➤ Step 27: COJG Employer Service Plan Home Page
Navigate to the employer’s service plan. Select COPY TRAINING INFORMATION from the Action Button.

➤ Step 28: Select Template Plan Page
Select the service plan with the training information previously entered. Click NEXT.
Step 29: Select Target Plans Page

Search for the **Group Name** in the drop-down menu and click FILTER. Alternatively, use the Select All checkbox or select the service plans individually. Click NEXT.

```
Step 30: Clone Plan Items Page

Review the list to ensure it is complete, and click COPY TRAINING INFORMATION.

Step 31: Result of Copy Training Information Page

The copy training information was successfully completed.
Next, update the incumbent service plans with their actuals.

System Steps

✦ Step 32: COJG Participant Service Plan Home Page

Select a participant service plan as the template. Enter the adjusted **Actual Training Cost**, **Actual Start Date** and **Actual End Date**. Ensure all required fields are complete. Complete the sub-goal with an outcome entered.

✦ Step 33: COJG Employer Service Plan Home Page

Navigate to the employer’s service plan. Select COPY TRAINING INFORMATION from the **Action Button**.

✦ Step 34: Select Template Plan Page

Select the service plan with the training information previously entered. Click NEXT.
## Select Template Plan

### Valid Templates: (Number of items: 7)

<table>
<thead>
<tr>
<th>Case Reference</th>
<th>Client Name</th>
<th>Group Name</th>
<th>Status</th>
<th>Other Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>5078772</td>
<td>Adam</td>
<td>New Hire...</td>
<td>Active</td>
<td>Client is identified as Verified Unemployed New Hire</td>
</tr>
<tr>
<td>5078779</td>
<td>Agnes</td>
<td>New Hire...</td>
<td>Active</td>
<td>Client is identified as Verified Unemployed New Hire</td>
</tr>
<tr>
<td>5078775</td>
<td>Cindy</td>
<td>Incumbent...</td>
<td>Active</td>
<td>Client is identified as Verified Unemployed New Hire</td>
</tr>
<tr>
<td>5078771</td>
<td>Dallen</td>
<td>New Hire...</td>
<td>Active</td>
<td>Client is identified as Verified Unemployed New Hire</td>
</tr>
<tr>
<td>5078770</td>
<td>Mercutio</td>
<td>Incumbent...</td>
<td>Active</td>
<td>Client is identified as Verified Unemployed New Hire</td>
</tr>
<tr>
<td>5078989</td>
<td>Rachel</td>
<td>Incumbent...</td>
<td>Active</td>
<td>Client is identified as Verified Unemployed New Hire</td>
</tr>
<tr>
<td>5078993</td>
<td>Remote</td>
<td>Incumbent...</td>
<td>Active</td>
<td>Client is identified as Verified Unemployed New Hire</td>
</tr>
</tbody>
</table>

### Invalid Templates: (Number of items: 0)
Step 35: Select Target Plans Page
Search for the **Group Name** in the drop-down menu and click FILTER. Alternatively, use the Select All checkbox or select the service plans individually. Click NEXT.

![Select Target Plans](image)

Step 36: Clone Plan Items Page
Review the target list to ensure it is complete, and click COPY TRAINING INFORMATION.

![Clone Plan Items](image)

Step 37: Result of Copy Training Information Page
The copy training information was successfully completed.
On the last day of training, all service plans need to be closed. The next step is to bulk close all participant service plans.

**System Steps**

1. **Step 38: COJG Employer Service Plan Home Page**
   
   Select BULK CLOSE PARTICIPANT PLANS from the **Action Button**.

2. **Step 39: Select Plans for Bulk Close Page**
   
   Select the service plans to close using the **Group Name** drop-down menu or click the checkboxes. Click NEXT.
主力

Step 40: Bulk Close Participant Plans Page

The **Reason** and **Outcome** are mandatory and must be entered. Ensure the list is correct, and click BULK CLOSE.

![Bulk Close Participant Plans](image)

Step 41: Bulk Close Result Page

The bulk close was successfully completed.

![Bulk Close Result](image)

Participant Service Plans

![Participant Service Plans](image)