

Employment Ontario Information System (EOIS) Case Management System Service Provider User Guide



Chapter 1: Introduction

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Document History

Version #	Date	Description
1.0	July 2010	Initial version released prior to the launch of the system on August 4, 2010.
1.01	August 2010	Corrected minor typos.
1.02	September 2010	'Skills Development' reference removed.
1.03	May 2011	Added references to Summer Jobs Service.
2.0	January 2012	Review and edit for Release 3.0
2.1	April 2013	Minor updates
2.2	August 2013	Minor update: <ul style="list-style-type: none"> 1.2.1 Background
2.3	July 2014	Updates to reflect new Release 4.0 user interface
2.4	August 2015	Updates to reflect Release 5.1
2.5	November 2015	Updates to reflect Release 5.2 Update to format and readability
2.6	April 2016	Updates to reflect Release 6.0
2.7	November 2016	Updates to reflect Release 6.3
2.8	June 2017	Removed reference to Targeted Initiative for Older Workers as it is no longer being offered as an Employment Ontario program
2.9	August 2018	Update screenshots re Curam v7 Upgrade

1.1 Structure and Content of User Guide

1.1.1 Content of User Guide

User guides for the EOIS Case Management System (the system) are structured into chapters and focus on specific roles and functions within the system. The user guides have been developed to provide end users with step-by-step instructions on how to use the system to support the management and administration of Employment Ontario programs and services.

The system will be used by both Ministry staff and Employment Ontario service providers. As such, user guides have been targeted for each user group and provide different system functionality perspectives depending on the system role a user has been assigned.

1.1.2 Using the Guide

System users should consider the following when using this guide:

- users must obtain the necessary system access permissions to accomplish the specific system tasks outlined in the user guide
- users should refer to the glossary for a list of core terminology used in the user guide
- it is recommended that readers use the online resource rather than a printed copy of the guide. All user guides are located on the [Employment Ontario Partners' Gateway](#)
- when using the guide electronically, clicking on hyperlinks will bring the reader to the relevant material within the document
- throughout the user guide specific types of items are distinguished through text styles:
 - links and actions have been capitalized
 - proper titles, such as the title of an **information panel** or a **field name** have been bolded.

The following icons appear throughout this user guide:



This icon denotes a helpful tip or a reminder related to a system step or a business process.



This icon denotes important information.



This icon denotes information that must be adhered to as it may impact business processes.

1.2 Context

1.2.1 Background

The Case Management System is a component of the Employment Ontario Information System (EOIS). It supports ministry and Employment Ontario service provider users in managing and administering Employment Ontario programs and services. The system is a web-based application, where all data is entered in real-time and is accessible across the province.

The system is being released in a phased approach. The first release supported the case management of clients participating in the Employment Service, as well as managing client activity for the following ministry delivered programs: Second Career, Feepayer, Apprenticeship, and Job Creation Partnership. After subsequent releases, EOIS-CaMS now supports the Literacy and Basic Skills, the Canada-Ontario Job Grant, Youth Job Connection, Youth Job Connection Summer, Youth Job Link, and SkillsAdvance Ontario.

1.2.2 The Employment Ontario Information System

It is important to note that the EOIS is not a single, stand-alone system. EOIS is comprised of various business systems that support the management and administration of Employment Ontario programs and services.

The EOIS Apprenticeship Application (EOIS APPR) was launched in March 2006 and was the first release of EOIS. EOIS APPR tracks the status of people training for apprenticeships in Ontario. The EOIS Service Provider Connect (SP Connect) is another component of EOIS and was released in May 2015. SP Connect manages contracts and facilitates transfer payments to Employment Ontario service providers.

In addition to the Case Management System, a Business Intelligence and Reporting (BI&R) component has been developed. The BI&R component will utilize information captured in the Case Management System to generate detailed reports that will support the management and administration of Employment Ontario programs and services.

1.2.3 Key Concepts and Components of the Case Management System

There are a number of key concepts in understanding how the Case Management System functions.

1.2.3.1 Users

A user is an individual who has access to, and can perform actions within, the system. Depending on the assigned system role, each user will be able to perform different functions within the system. In order to access the system, each user is assigned a unique User ID.



User IDs must not be shared.



Every action that is performed in the system can be tracked and associated to the user that performed it.

1.2.3.2 Participants

There are many individuals and organizational bodies that are involved in Employment Ontario. They are referred to in the system as “participants.” Each of these participants plays a role in the delivery or receipt of Employment Ontario programs and services.

There are four participant types:

- person
- employer
- educational institute
- service provider.

A set of information is stored for each participant type. Some common information, such as addresses, is stored for all participant types, while some information is unique to the participant type. For example, banking information is only stored for the Person type.

Each participant's information is stored in a central location. This allows the participant's information to be easily accessed and maintained by any user with appropriate system access rights.

Participant Registration

Participant registration is the process to add a new participant to the system. The registration information that is collected during participant registration has been determined to be core participant information that is common to all Employment Ontario programs and services. Upon completion of participant registration, the system stores the registration information and assigns a unique identifier (a reference number) for each participant.

Add and Maintain Participant Information

Participant information that is unique to an Employment Ontario program or service is added to the registered participant record once the participant registration process is complete. It can be added and maintained as required so that users can keep the information accurate and up-to-date. For example, a user can add a new address for a client.

Client Profile

The person participant type is used to capture client information, which is stored in the client profile. The client profile stores information about the client that is common to all Employment Ontario programs and services and is viewable and editable by all system users (within both the ministry and service providers) with the appropriate system permissions. Some information, such as bank account details, can only be viewed by the ministry.

Employment History and Employer Profile

Information on employers appears in the system in two ways: as employment history in the client profile and as employer information in the employer profile.

Within the client profile, employment history is recorded for a variety of purposes. This includes past employment, employment relating to placements, and employment relating to outcomes. As a client's employment history changes, the employment record is updated to record the relevant details. If the employment history is related to a placement with an employer, the employment record is updated with a link to the employer, whose information is stored within an employer profile.

The employer participant type is used to capture employer information, which is stored in the employer profile. This includes basic information as well as information relating to the size and nature of the employer. Once the employer profile is created, the information can be accessed by any service provider who has access to the system, as well as by ministry users. Through the employer profile, users can view the history of an employer's participation in placement activity including all clients linked to the employer, the duration of placements, and outcome results.

Service Provider Management

Service providers are set up in the system as a type of participant. Service provider profiles have a hierarchical format beginning with the service provider's corporate level information and branching off to include one or more service delivery site locations. The service delivery sites are based on Employment Ontario funded service locations. The system uses the service provider profile to:

- manage service provider and service delivery site details
- create and maintain service provider staff members who are identified as system users
- link the service provider's information across EOIS sub-systems including the Contract Management System and Business Intelligence and Reporting.

1.2.3.3 Cases

Cases are used by the system to manage the delivery of Employment Ontario programs and services. For example, if a client submits an application for an Employment Ontario program, a case is created to manage this application. Cases go through multiple stages in their life.

Information for each case is stored in a central location. This makes it easier to maintain information for that case and to track the progression of a case throughout its lifecycle. A typical case contains information about the client wishing to receive a benefit or service, information about other participants involved in the case, the evidence used to make determinations regarding the case, eligibility decision information, and a record of all financial transactions made on that case. It also contains information about communication between the organization and participants, any notes recorded for the case, and events that occurred as part of case processing. Essentially, the case becomes a folder for all of the information relating to the delivery of the Employment Ontario program(s) or service(s).

Case Types

There are three case types used by the system:

- integrated case (Employment Ontario Case)
- service plan
- product delivery case.

Each case type has a different purpose with respect to the delivery of Employment Ontario programs and services. A client can only have one Employment Ontario Case, but can have multiple service plans and product delivery cases. A client can, however, only have one active service plan and one active product delivery case at one time.

Employment Ontario Case

The integrated case type is used in the system to create an Employment Ontario Case, which acts as a folder to manage Service Plans and Product Delivery Cases. The purpose of the Employment Ontario Case is to consolidate case information for a client and provide a single view of an individual's participation in Employment Ontario by allowing for quick access to a client's profile and cases, including both active and past Service Plans and Product Delivery Cases.

There are three levels of information that can be viewed through the Employment Ontario Case: the information that is stored directly within the Employment Ontario Case, the client information that is stored within the client profile, and information specific to the other cases contained within the Employment Ontario Case. For example, information relating to employment or education history is stored in the client profile, information relating to participation in a program or service is stored in a product delivery case or service plan, and additional information, such as notes, can also be captured in the Employment Ontario Case. Information for each of these levels can be accessed and maintained through the Employment Ontario Case, but depending on a user's role, some information may not be viewable or editable.

Service Plan

The service plan case type is used in the system by Employment Ontario service providers to plan, in an integrated manner, the delivery of services and activities to assist a client in achieving a specific goal. Service plans are based on service planning methodology that relies on a comprehensive, outcome-based model. This approach helps service providers to focus on achieving a desired outcome for the client, providing the tools necessary to construct the plan and then track and monitor progress. Though the service plan is a case type, the term "case" is not used in reference to the service plan.

The system allows service provider staff working with clients to identify what must be done to meet the program goals, to create a plan of supportive activities to help clients meet those goals, to document a history of activities previously provided, and to track their progress in meeting those objectives. Different programs and services have individualized goals, performance measures, activities and outcome options.

Users select a service plan template which is customized by program, providing users with only the information appropriate to the program. The service plan type selected provides a template that guides the user in the creation and maintenance of the service plan based on program requirements, performance measures and reporting needs. There are currently eight service plan types: the Employment Service, Literacy and Basic Skills, Canada-Ontario Job Grant Participants, Targeted Initiative for Older Workers, Youth Job Connection, Youth Job Connection Summer, Youth Job Link, and SkillsAdvance Ontario. Each service plan has a common structure:

- service plan type (service)
- sub goals (service components)
- plan items (service activities).

Product Delivery Case

The product delivery case is located within a client's Employment Ontario Case and is used to manage a client's funded program activity. It determines whether or not a client meets the eligibility criteria for a ministry delivered program (MDP). A "product" is synonymous with a MDP, and a product delivery case contains all of the information and functions needed to determine eligibility and to deliver benefits and services under a product. Benefits are payments that are directed to clients for specific uses under products. For example, transportation and tuition are two of the benefit types available under Second Career, which is a product in the system. The product types are:

- Second Career
- Apprenticeship
- Fee Payer
- Job Creation Partnership
- Apprenticeship Completion Bonus
- Employer Bonus
- Support to Non-EI Eligible Apprentices

Product delivery cases are designed to simplify the administration of ministry delivered programs by organizing information into sections:

- Evidence: which forms the basis of the assessment of the request and includes details on program criteria such as benefit information; eligibility information; product details such as training specifics; and, multi-year forecasting.
- Financial: which provides data on the net results once benefits are established. This includes payments, deductions, and overpayments.
- Contract: which is generated based on the information entered in the client profile and the product delivery case. In order for a client to receive payments, they must sign an agreement.

The creation of a new product delivery case begins with the creation of evidence. Evidence and rules are used to reach a decision regarding a client's eligibility for a benefit or service. Evidence is data that is assessed to determine whether or not the client is eligible for the benefit or service. Rules are conditions of entitlement. A client must satisfy these rules, which are run against the evidence to check eligibility, in order to qualify for the benefit or service. If any issues arise during this validation, error messages are displayed which enable the user to make corrections as needed.

Home Pages

Every user, participant and case has a home page. The user home page is the entry point to the system. Each user is provided with a home page within the system based on the user's assigned system role. The home page is designed to contain links to functions within the system that are commonly used by the user. The participant and case home pages summarize registration information and provide links to manually add and maintain information as required. Information relating to how to navigate between user, participant and case home pages can be found in Chapter 2.

Lifecycle and Status

Product delivery cases and service plans go through a series of stages, referred to as lifecycles, as they progress from creation to closure. Each stage in the lifecycle is assigned a case status. For example, when a case is first created, its status is "open." If a case is in between stages, the status is "delayed process pending." The case status, which is on the case home page, indicates the current stage in the case lifecycle. It also dictates the stage or stages through which a case can progress. For example, an open case must be approved before it can be activated.

Recording Outcomes and Follow-Ups

Service plans and product delivery cases have an expected duration and outcome. They are closed when activity is complete or the client no longer wishes to continue with the service plan or product delivery case. Based on program requirements, when a service plan is completed there will be follow up activity that will need to be tracked.

1.2.4 Roles and Responsibilities

All users access the same system, whether they are employed by the ministry or by service providers. However, different types of users will have access to different components, depending on their role and responsibilities. The entire client lifecycle is captured in the system by tracking the client’s activities with both the service providers and the ministry. Service providers will be using the system to refer clients to ministry delivered programs.

Service provider users may have several roles. The name of the user’s role will display at the **top-left hand** of the page.

