

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



Chapter 11: Employment Ontario Self Service Applications

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Document History

Version #	Date	Description
1.0	April 2013	Initial version released prior to the launch of the system on August 4, 2010.
1.1	July 2014	Updates to reflect new Release 4.0 user interface.
2.0	May 2015	Corrected an incorrect chapter reference.
2.1	August 2015	Updates to reflect Release 5.1
2.2	December 2015	Updates to reflect Release 5.2 Update to format and readability
2.3	May 2016	Update to reflect Release 6.0
2.4	June 2017	Removed reference to Youth Job Link and Targeted Initiative for Older Workers
2.5	September 2018	Update screenshots re Curam v7 Upgrade

11.1 Employment Ontario Self Service Applications

This chapter explains functionality related to Employment Ontario Self Service (EOSS) applications in EOIS-CaMS.

EOSS has a number of key features for both clients and service providers. For clients, EOSS provides the opportunity to:

- Pre-Screen for Employment Ontario programs and services using a guided questionnaire. EOSS will generate a Suggested Resources list for the client that may include Employment Ontario programs and services, as well as informational links to other provincial and federal resources.
- Apply online for one of the Employment Ontario programs suggested to them.
- Search for and select an Employment Ontario service provider by city or postal code, and submit their online application to the service provider of their choice for follow-up.

ES, LBS, YJC and YJCS service providers are able to receive and process online applications through EOIS-CaMS. When a client applies online through EOSS, the online application is intended to direct clients to a service provider in their area who can assist them. Clients who apply online must meet with an ES, LBS, YJC or YJCS service provider to complete the assessment and application process.

11.2 Managing Applications

EOSS information is managed in EOIS-CaMS by Employment Service (ES), Literacy and Basic Skills (LBS), Youth Job Connection (YJC) and Youth Job Connection Summer (YJCS) service providers. No new user roles are being created for EOSS; existing EOIS-CaMS users are able to access new functionality through EOIS-CaMS with existing user accounts.

There are two ways EOSS can notify a service delivery site that it was selected by a client, either by a user logging into their EOIS-CaMS account or by assigning an **EOSS email address** for the Service Delivery Site.

Another important feature related to EOSS is the **Available for Service** checkbox on the Service Delivery Site Home page. This checkbox indicates a service delivery site's availability to accept EOSS applications. Note that this indicator will default to checked for all existing and new service delivery sites.

The EOSS email address and the Available for Service indicator are discussed in Chapter 4, Service Provider Information and User Management.

11.3 Search for an Application

Once an application has been submitted to a service delivery site, any user from the service provider can find and manage it. Any service provider user can also find and view applications sent to any other service providers, but they cannot manage the applications.

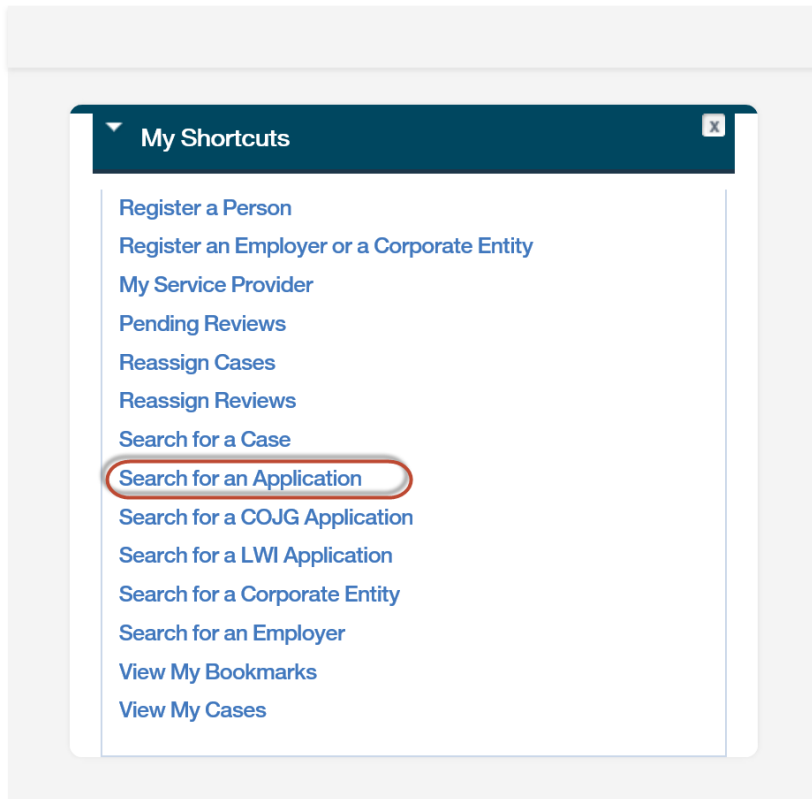
System Steps

➔ Step 1: Workspace Page

Click SEARCH FOR AN APPLICATION from the **My Shortcuts** list.

[Workspace](#) [Cases and Outcomes](#) [Calendar](#)

Welcome to the EOIS Case Management System



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➔ Step 2: Application Search Page

By default, the **Search Results** panel will display all applications with a **Status** of “Submitted” that were sent to any service delivery site within the user’s service provider. There are a number of search criteria that can be used to find applications for a specific service delivery site, applications with a different status, or other specified characteristics.

Click the APPLICATION NUMBER next to the appropriate application.

Application Search ✕

Application Search

 
* required field

Search Criteria ▼

You can search using the Application Number or a combination of other search criteria.

Application Number	<input type="text"/>	Client Type	<input type="text"/>
Last Name	<input type="text"/>	First Name	<input type="text"/>
Business Name	<input type="text"/>	Status	<input type="text"/>
Service	<input type="text"/>	Submitted Date To	<input type="text"/>
Submitted Date From	<input type="text"/>	Application Owner	<input type="text"/>
Service Delivery Site	<input type="text"/>		

Search Results (Number of Items: 71 out of 71) ▼

Application Number	Last Name	Business Name	Date Submitted	Service Delivery Site	Service	Status
1530223922773	Gould		28/06/2018	YRDSB - Thornhill	Literacy and Basic Skills	Submitted

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➡ Step 3: Application Home Page

The Application Home page is displayed.

Application Search x ECSS (S...) 1530223922773 x

Shannon - 1530223922773

Application Number	1530223922773	Date Submitted	28/06/2018
First Name	Shannon	Last Name	

Application Home

Application

Application Number	1530223922773	Owner	Change Owner
Service Delivery Site	YRDSB - Thornhill	Client Type	I am an Individual
Service	Literacy and Basic Skills	Outcome	
Status	Open	Date Submitted	28/06/2018

Individual/Business Information

Details

Address

Contact

Recent Changes

Event Type	Description	Date Time	Created By
▶ Application Opened	Application was opened by Doug	14/09/2018 12:28	Doug



When an application is opened by a user, its **Status** changes from “Submitted” to “Open.” This means that it will no longer appear in the default search results in the Search for an Application page.

11.4 Application Home Page

Consistent with other EOIS-CaMS functionality, applications have an **Application Number** and a home page. The functions available from the Application Home page **Action Button** are as follows.

1. Forward Application: If after contacting the client, it is decided that another service delivery site would offer more appropriate services (either in the current service provider or another service provider, the application should be forwarded. The **Status** of the application will change to “Forwarded.”
2. Record Follow-up: Once the client has been contacted, the follow-up result is recorded. Recording a follow-up changes the **Status** to “In Progress.”
3. Close Application: Once the client has been followed up with and an appointment has been scheduled, a follow-up reason should be recorded and the application should be closed. This is also the case when there is a valid reason the application cannot be processed and client follow-up cannot be completed. The **Status** of the application will change to “Closed.”
4. Record Outcome: Once an appointment has been held with the client, or another outcome has occurred, an **Outcome** can be assigned. The **Status** of the application will change to “Outcome Assigned.”
5. Create Employment Ontario Case: Once an outcome has been assigned, and if the client is to be registered in EOIS-CaMS, the CREATE EMPLOYMENT ONTARIO CASE will open the Person Registration page with values from the application pre-populated in their relevant fields. The Employment Ontario Case does not have to be created using this link; it is simply intended to save data entry time.

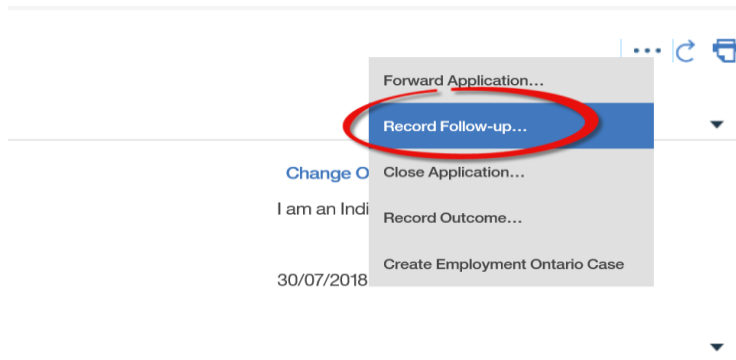
11.5 Record Follow-up

System Steps

➤ Step 1: Application Home Page

From the **Action Button**, select RECORD FOLLOW-UP.

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➡ Step 2: Record Application Follow-up Page

Select a **Follow-up Result** and a **Follow-up Date**, and click SAVE

Record Application Follow-up EOSS (S. Gould) 1530223922773 ⓧ

* required field

Details ▼

Follow-up Result * Follow-up Date * 📅

Comments ▼

11.6 Forward Application

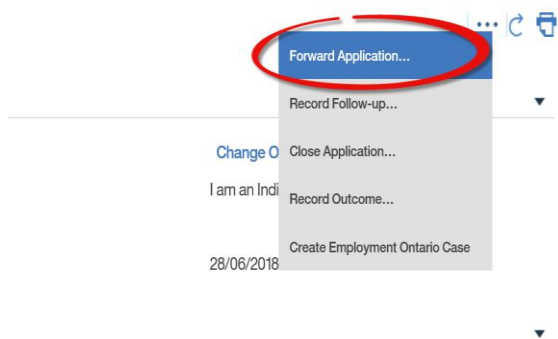


The **Status** must be “In Progress” before an application can be forwarded.

System Steps

➔ Step 1: Application Home Page

From the **Action Button**, select FORWARD APPLICATION.



➔ Step 2: Forward Application Page

Use the magnifying glass icon to select a **Service Delivery Site**.

Forward Application EOSS (S.) 1530223922773 ✕

* required field

Details ▼

Service Delivery Site * 🔍 ✕

Client Consent Reason *

Comments ▼

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➡ Step 3: Service Delivery Site Search Page

Conduct a search, and click **SELECT** next to the appropriate **Service Delivery Site**.

Service Delivery Site Search ✕

* required field

Search Criteria

Reference Number	<input type="text"/>	Service Delivery Site Name	War
Address	<input type="text"/>	City	<input type="text"/>
Status	<input type="text"/>		

Service Delivery Sites (Number of Items: 19 out of 19)

Action	Reference Number	Service Delivery Site Name	Address	City	Status
Select	4587A	Kawartha Pine Ridge DSB - Peterborough	201 MCDONNELL STREET	PETERBOROUGH	Active
Select	4158A	St Clair College - Windsor - 3015 Howard Ave	2-3015 HOWARD AVE	WINDSOR	Active

➡ Step 4: Forward Application Page

Enter a **Reason**, record the **Client Consent**, and click **SAVE**.

Forward Application EOSS (S.) 1530223922773 ✕

* required field

Details

Service Delivery Site *	Kawartha Pine Ridge DSB - Peterborough	<input type="button" value="✕"/>
Client Consent <input checked="" type="checkbox"/>	Reason *	Requested by Client

Comments

11.7 Close Application



The **Status** must be “In Progress” before an application can be closed.

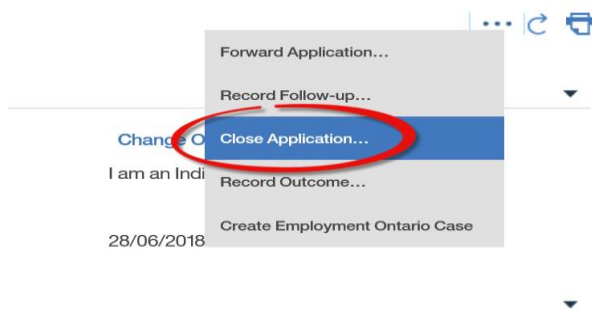


Once closed, the **Reason** cannot be edited.

System Steps

➔ Step 1: Application Home Page

From the **Action Button**, select CLOSE APPLICATION.



➔ Step 2: Close Application Page

Select a **Reason**, and click SAVE.

Close Application EOSS (S. Gould) 1530223922773 ✕

* required field

Details ▼

Reason * ▼

Comments ▼

Record Outcome



The **Status** must be “Closed” before an **Outcome** can be recorded.

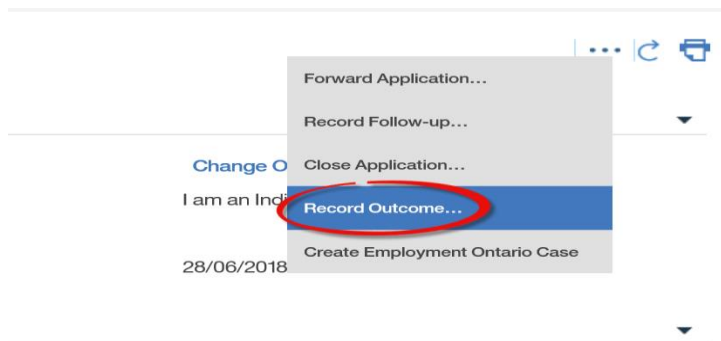


Once saved, an **Outcome** cannot be edited.

System Steps

➡ Step 1: Application Home Page

From the **Action Button**, select RECORD OUTCOME.



➡ Step 2: Record Application Outcome Page

Select an **Outcome** and an **Outcome Date**, and click SAVE.

Record Application Outcome EOSS (S.) 1530223922773 ✕

* required field

Details ▼

Outcome * ▼

Outcome Date * 📅

Comments ▼

11.8 Create Employment Ontario Case

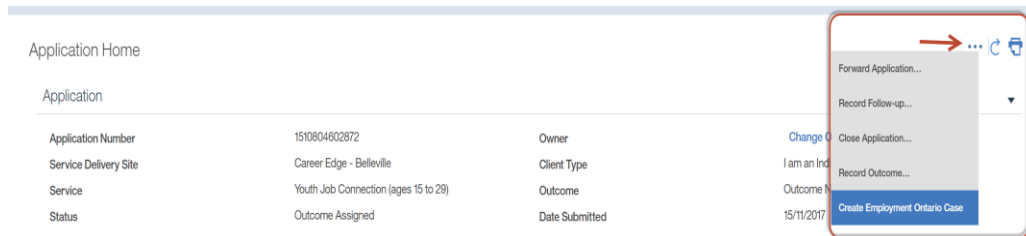


The Status must be “Outcome Assigned” before the Employment Ontario Case can be created through the application.

System Steps

➔ Step 1: Application Home Page

From the **Action Button**, select CREATE EMPLOYMENT ONTARIO CASE.



➔ Step 2: Confirm Person Not Registered Page

Several values will be pre-populated on this page. Enter missing information such as **Date of Birth**, and click SEARCH.

Confirm Person Not Already Registered
Enter search criteria to help you determine if the person has been registered before.

Search Criteria

Reference Number		I Identify As	Male
Last Name	Bird	First Name	Big
Date of Birth	21/08/2008	APPR Client Party ID	

Search Results

Case Reference	Client Reference	First Name	Last Name	City	Date Of Birth	APPR Client Party ID
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Step 3: Confirm Person Not Registered Page

If the client does not appear in the search results, click CONTINUE.

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Confirm Person Not Already Registered 🔄 🖨️
Enter search criteria to help you determine if the person has been registered before. * required field

Search Criteria

Reference Number	<input type="text"/>	I Identify As	Male
Last Name	Bird	First Name	Big <input type="checkbox"/>
Date of Birth	21/08/2008	APPR Client Party ID	<input type="text"/>

Search Results (Number of Items: 0 out of 0)

Case Reference	Client Reference	First Name	Last Name	City	Date Of Birth	APPR Client Party ID
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➡ Step 4: Confirm Person Not Registered Page

The client registration process will now begin. For more information on client registration, refer to Chapter 6, Employment Ontario Case and Client Profile.

Application Search X | EOSS (W. Sedg) 1500493979604 X | Register a Person X

★ Register ✖ Cancel 🔄 🖨️
* required field

Name

First Name *	William	Middle Name	<input type="text"/>
Last Name *	Sedg	Suffix	<input type="text"/>
Initials	<input type="text"/>	Birth Last Name	<input type="text"/>
Mother's Birth Last Name	<input type="text"/>	APPR Client Party ID	<input type="text"/>
Title	<input type="text"/>		