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## Document History

<table>
<thead>
<tr>
<th>Version #</th>
<th>Date</th>
<th>Description</th>
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<tr>
<td>1.0</td>
<td>July 2010</td>
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- Forwarding Tasks  
- Closing Tasks  
- Modifying Addresses  
- View Previous Address(es) |
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- 3.1.2.4 Notifications List  
- 3.3.7 My Service Plans |
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- 3.2.2 Bookmarks  
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| 2.9       | November 2018 | Update screenshots re Curam v7 Upgrade" |
3.1 Introduction

This chapter explains common features that can be found in various parts of the EOIS Case Management System (the system). Some of these features, such as tasks and notifications, are accessed through the Workspace page, while others can be accessed through pages. Although these features are used in a variety of ways and in a number of places in the system, they will function in a consistent manner.

3.2 Tasks and Notifications

Users have the ability to manage tasks and view notifications. A task is an instruction to carry out an item of work and is either manually created by a user or automatically created by the system. A notification is a system-generated message delivered to a system user that notifies the user of activities that have been completed by the system or may require follow up by the user.

Tasks can be assigned, reserved or closed. A task that has been assigned has been sent to a user by a system-generated process or by another user. The task is not "owned" by a user until it has been reserved. Reserving a task moves the task from the user's Assigned Tasks list to the Reserved Tasks list. Tasks can also be un-reserved, forwarded, deferred, restarted or closed.

How non-system generated tasks are used will depend on local business practices.
3.2.1 Tasks System Tab

Tasks and notifications can be accessed through the Tasks system tab. The system automatically defaults to the Reserved Tasks List, which is described below.

3.2.1.1 Assigned Tasks List

A task can be assigned to a user by the system as a result of an automatic process or by being assigned by another user. Once the task is reserved by the user, it will no longer appear in the Assigned Tasks list; it will only appear in the Reserved Tasks list.

System generated tasks for a user will appear in the Assigned Tasks list.

3.2.1.2 Deferred Tasks List

Once reserved, a task may be deferred until a later date. A deferred task is moved from the user’s Reserved Tasks list into the user’s Deferred Tasks list. A restart date is required for the task. The system defaults to the current date, so the user will need to modify this field to a future date. The task is automatically returned to the Reserved Task list on the specified date. The user also has the ability to manually click RESTART from the Action Button to move the task to the Reserved Tasks list at any point.
### 3.2.1.3 Reserved Tasks List

In order to action a task, a user must first reserve the task. This page displays a list of the tasks whose status is set to “Open” that the user has reserved. Reserving a task moves the task from the user’s **Assigned Tasks** list to the **Reserved Task** list.

![Reserved Tasks List Image]

### 3.2.2 Shortcuts Panel

The Shortcuts Panel allows the user to perform the following functions:

- My Tasks
- Create Task
- Find Task
- Reserve Next Task
- View Tasks before Deadlines
- My Notifications

![Shortcuts Panel Image]
3.2.2.1 Reserve Next Task

This feature allows the user to reserve the next available task. When RESERVE NEXT TASK is clicked, it will reserve the next available task in the Assigned Tasks list for the user. If two tasks have the same deadline, the task with the higher priority will be the next available task to the user.

3.2.2.2 Find Task

This feature allows the user to search for a task.

3.2.2.3 Create Task

This feature allows the user to create a new task for a participant or case.

System Steps

Step 1: Create User Task Page
Complete the necessary fields, and click SAVE or SAVE & NEW.

The Priority drop-down menu determines the priority of the task. The priority assigned can either be “low,” “medium” or “high.”

The Concerning information panel allows the user to associate the task with a particular participant or case. By selecting a case participant when manually creating a task, the PARTICIPANT HOME PAGE link will be included as a link in the Supporting Information panel. Similarly, by selecting a case reference, the CASE HOME PAGE link will be included as a link in the Supporting Information panel.
A task must be associated with a participant. A Task Search only allows the user to search by Task ID, Case Reference Number and Participant. If the Task ID or Case Reference Number is not known, the user will not be able to find the specific task. Searching for a task by participant will allow the user to see all tasks associated to the participant, even tasks related to a case.

The Assignment Details information panel allows the user to assign the task to another user or to reserve the task to themselves.

3.2.2.4 View Tasks Before Deadline

This feature allows the user to view all tasks that have due dates before their deadlines. These are tasks that have a due date of greater than a week.

3.2.2.5 My Notifications List

A notification can be generated by any type of activity and can only be created by the system. A notification for a specific activity is delivered when that activity is executed.

Each notification contains subject and body text. This text can include parameters which will be populated by system data when the notification is created. When a user selects the toggle for a notification on the My Notifications list, they are shown the notification details. A user may choose to sort their notifications prior to deletion. Sorting notifications can be completed by clicking on the column headers. Users can delete a notification by either clicking DELETE from the Action Button or clicking DELETE SELECTED on the My Notifications list after selecting the check box next to the notification.
Notifications will be automatically deleted after 30 days.

If a notification is deleted, it cannot be recovered.

3.2.3 Task Home Page

When a user selects the task on the task list, they are taken to the Task Home page. The Task Home page allows the user to view information relating to a specific task and perform actions to that task. The following page tabs can be used to view the history of the task:

- Task Home
- History and Comments
- Assignment List
- Graphical View
3.2.3.1 Page Tabs

**Task Home:** allows the user to view the details of a particular task.

**History and Comments:** displays all of the events that have occurred during the life cycle of a particular task. For each event, the user name, date and time, previous value and new value are recorded. If a comment is added to a task, it will display here. Unlike comments elsewhere in the system, these comments cannot be overwritten.

**Assignment List:** displays a list of other user(s) to which a task is assigned.

**Graphical View:** allows the user to view a graph of task assignments. Once a task is closed, information is updated in the **Instance Data Details** section. The status will update to “Completed,” **Task Status** will update to “Closed,” and the **End Date Time** will populate with the time the task was closed.
3.2.3.2 Manage Tasks

The following actions can be taken from the **Action Button** on the Task Home page:

- Add Comment
- Reserve
- Forward
- Defer
- Close
- Un-Reserve
- Reallocate
- Restart

Add Comment: this function allows the user to add a comment to a task. The user does not need to reserve a task in order to add a comment. This also allows a user to add comments to tasks that have been reserved by other users. The comment is recorded in the task history, and unlike comments elsewhere in the system, cannot be overwritten.

Reserve: this function allows the user to reserve a task assigned to a user. In order to action the task, a user must first reserve the task. Reserving the task removes the task from the Assigned Tasks of all other users, making the task exclusive to the user who reserved the task. The task moves from the user's assigned tasks list to his or her reserved tasks list.

Forward: this function allows the user to forward a reserved task to another user.
Defer: this function allows the user to defer a task. Deferring a task places the task on hold until a later date. When a task is deferred it moves from the Reserved Tasks list to the Deferred Tasks list. The task, however, is still reserved by the same user. The task can be scheduled for automatic restart. This means that the system will automatically revert the task status from deferred back to open on the date specified. The task will then appear in the user’s Reserved Tasks list.

Close: this function allows the user to close a task. Once closed, the task will not appear in any of the task lists, but can be searched for by using the Task ID.

Un-Reserve: this function allows the user to un-reserve a task, which makes the task available again to users previously assigned to it. When un-reserved, the task moves from the Reserved Tasks list of that user to the Assigned Tasks lists. Tasks can only be un-reserved by the user who originally reserved the task.

Reallocate: this function is not used by ministry or service providers in the system.

Restart: this function allows a user to restart a deferred task and returns it to the user’s Reserved Tasks list. This performs the same function as the automatic restart done by the system, but can be done manually at any time by the user.

3.2.3.3. Supporting Information

The **Supporting Information** section provides a link to the case home page and participant home page. Users can select either link as a starting point to complete a task. For more information on creating tasks, refer to section 3.2.2.3.
3.2.4 Forwarding Tasks

There are many instances when a task may need to be forwarded to another user. This includes when a user account cannot be closed because the user has open tasks assigned or reserved to them. The following system steps demonstrate the entire process for forwarding the tasks of another user. If a user needs to forward one of their own tasks, start at step 7.

A task can only be forwarded to another user in the same service provider.

System Steps

Bruce Step 1: Workspace Page

Click the Tasks system tab.

Bruce Step 2: Assigned Tasks Page

Open the Shortcuts Panel, and click FIND TASK.
Step 3: Task Search Page
Click on the magnifying glass icon next to **Owner** to search for a user.

Step 4: User Search Page
Enter **First Name** and **Last Name**, and click SEARCH. Click SELECT next to the appropriate user.

Step 5: Task Search Page
The user is now populated in the **Owner** field. Click SEARCH.
Step 6: Task Search Page

In the **Search Results** information panel, select the appropriate Task ID.

![Task Search Page](image)

Step 7: Task Home Page

From the **Action Button**, click **FORWARD**.

![Task Home Page](image)

Step 8: Forward Task Page

Click on the magnifying glass icon next to **Forward to User** to search for a user.
Step 9: User Search Page

Enter **First Name** and **Last Name**, and click SEARCH. Click SELECT next to the appropriate user.

Step 10: Forward Task Page

The user’s name now appears in the **Forward to User** field. Click SAVE. The task will now be assigned to the user to whom the task was forwarded.
3.2.5 Closing Tasks

When a task is completed, or if it is no longer needed, it can be closed.

A task can only be closed by a user if they have first reserved it. The exception to this is a SPRA, who can close another user’s tasks without reserving them first.

System Steps

✦ Step 1: Task Home Page
From the Action Button, click CLOSE.

✦ Step 2: Close Task
Click YES to confirm.
3.3. Common Functionality

There is functionality within the system that is common to all participant and case types.

3.3.1 Notes

Notes are used to add additional information to participants and cases. A note is simply free text and is displayed only in the section where it was originally entered.

Notes cannot be deleted once entered, so it is important to ensure the text entered is correct. Using the DELETE action simply changes the status of the note to “Cancelled,” and the note will remain visible to the user. Likewise, when a note is edited, the original text of the note remains visible.
3.3.1.1 Adding a Note

To add a note, select a priority and sensitivity level. A sensitivity level of 1 will allow all users to view these notes. Enter the text for the note, and click SAVE or SAVE & NEW.

![Create Note](image)

If the note is captured in the Employment Ontario Case or in a client’s profile, it will be visible to both ministry and service provider users.

3.3.2 Bookmarks

A bookmark allows the user to bookmark a case for future reference. This is a useful tool for users who manage multiple cases simultaneously. Bookmarks can be added and removed at any time. The Add Bookmark feature is accessible from any case home page.

3.3.2.1 Adding a bookmark

To add a bookmark, click ADD BOOKMARK from the Action Button. A pop-up window appears; click YES to add a bookmark.
A list of bookmarked cases can be viewed from the View My Bookmarks page, which is accessed through the My Shortcuts list on the Workspace. Users can add and remove cases from this list or directly from the case home page.
3.3.3 Contact Information

For all participant types, similar information is collected in the **Contact** tab.

### 3.3.3.1 Addresses

A participant can have more than one address in the system; however, the first address entered will default as the primary address. The **From** and **To** dates play an integral role in the system as the address must be within this date range to be active. A valid address is crucial as it is linked to case decisions such as checking eligibility for a product delivery case or sending correspondence to the client. Addresses in the system are entered using a centralized Postal Code Look-up application. This feature allows for a search to retrieve accurate data.
When a postal code is entered, the Canada Post lookup page will load pre-populated with the address details for the given postal code.

Users will also have the ability to enter additional information in the Address Details page, which has not been defined by the postal code, such as the street number, unit or suite number and any other relevant information.

To save the information, click CONTINUE. The address fields in the Primary Mailing Address Details information panel will be populated with the information retrieved from the Postal Code Look Up application.

If the address cannot be found in the Canada Post lookup, verify the address on Canada Post's website.
Modifying Addresses

System Steps

✍ Step 1: Person Home Page
From the Contact tab select Address in the tab content bar.

✍ Step 2: Addresses Page
Click EDIT in the Action Button next to the address that requires modification.

Do not click NEW to change an address. This may result in overpayments for clients with active product delivery cases.
Step 3: Modify Address Page

Using the Postal Code Lookup function, retrieve the new address. Ensure the address is displayed correctly, and click SAVE.

### 3.3.3.2 Phone Numbers

A phone number is a contact number relevant to a participant. Each phone number has a type such as private, business, or home. The first phone number entered is set as the primary number; this can be changed after registration if required.
Adding a Phone Number

To add a phone number, click NEW from the Phone Numbers page. The type of phone number can be selected from the **Type** drop-down menu. The fields with an asterisk are mandatory. Click SAVE or SAVE & NEW to add an additional phone number.

3.3.3.3 Email Addresses

An email address identifies a location to which email can be delivered. It is not mandatory for participants to have an email address. Participants may have more than one email addresses recorded, but one email address will be designated as the primary. There are two types of email address, business and personal.
Adding an Email Address

To add an email address, click NEW from the Email Addresses page. The type of email address can be selected from the Type drop-down menu. Ensure that the fields marked with an asterisk are completed. The **From** field will allow past, current, and future dates to be entered for a person; however, for employer and educational institutes, the **From** date cannot be earlier than their start dates. Likewise, the **To** date cannot be greater than the end date. The first email address entered becomes the primary by default. The **Primary** checkbox is beneficial when additional email addresses are created. Click **SAVE** when completed or **SAVE & NEW** to add an additional email address.

![Create Email Address](image)

3.3.3.4 Web Addresses

A web address is the location of a web page on the Internet. It is not mandatory for participants to have a web address. Participants can have a number of different web addresses recorded, only one of which can be primary. The user has the option to select the type of web address such as personal or financial.

![Web Addresses](image)
Adding a Web Address

To add a web address, click NEW from the Web Addresses page. The type of web address can be selected from the Type drop-down menu. Ensure that the fields marked with an asterisk are completed. The From field is mandatory and will allow past, current, and future dates to be entered. The first web address entered becomes the primary by default. The Primary checkbox is useful when multiple web addresses are created. Click SAVE when completed or SAVE & NEW to add an additional web address.
3.3.4 Communications

The Communications section is used to record communications between the ministry and participants such as clients and employers.

3.3.4.1 Record Communication

All communications are stored as client interactions. A participant’s list of interactions provides information on all of a participant’s communications and payments. Interactions are useful because they form an overview of a participant's contact with the organization.

To record communications, select the Administration tab. In the tab content bar, click Communications. Click RECORD COMMUNICATION and ensure a correspondent is selected. Click NEXT.
Once the correspondent is selected, the communication can be recorded.

### Record Communication

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<th>Communication Details</th>
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</tr>
<tr>
<td><strong>Document Location</strong></td>
</tr>
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</table>

Save  Cancel
3.3.5 Task List

Tasks, discussed in section 3, associated with a participant or case will display in their respective tasks page in the section navigation. This page will display all tasks associated to the participant or case including both reserved and un-reserved tasks. The NEW action allows users to easily select this function from participant and case home pages.
3.3.6 Find Applications

Once an Employment Ontario Self Service (EOSS) 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. For more information on EOSS, refer to Chapter 11.

System Steps

::* Step 1: Workspace Page
Click SEARCH FOR AN APPLICATION.
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.
Step 3: Application Home Page
The Application Home page is displayed.