Chapter 4: Service Provider Information and User Management
Table of Contents

Chapter 4: Service Provider Information and User Management ............................................... 1

Document History .................................................................................................................. 3

4.1 Introduction ................................................................................................................... 5

4.2 Roles and Responsibilities ........................................................................................... 6

4.3 Creating Service Provider Members ............................................................................. 8

4.4 Update Identity Verification .......................................................................................... 14

4.5 Modify Service Provider Members .............................................................................. 16

  4.5.1 Modify Details ...................................................................................................... 18

  4.5.2 Modify Phone Number .......................................................................................... 18

  4.5.3 Modify User Role ................................................................................................ 20

4.6 Resetting User PIN ..................................................................................................... 22

4.7 Deactivating Service Provider Users .......................................................................... 25

  4.7.1 Reassigning Service Plans .................................................................................... 28

  4.7.2 Reassigning Reviews ............................................................................................ 31

4.8 Reactivating Service Provider Users .......................................................................... 31

4.9 Creating Service Delivery Site Members ................................................................. 33

4.10 Modifying Service Delivery Site Members .............................................................. 37

  4.10.1 Modify Details .................................................................................................... 37

  4.10.2 Modify Main Contact ......................................................................................... 38

4.11 View Ministry Contacts ............................................................................................. 39

4.12 Creating and Modifying Service Provider Profile and Service Delivery Sites

  Contact Information ........................................................................................................... 40

  4.12.1 Assigning a Self Service Email Address ............................................................. 41

  4.12.2 Modifying the Service Delivery Site Home Page .............................................. 43
## Document History

<table>
<thead>
<tr>
<th>Version #</th>
<th>Date</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>July 23, 2010</td>
<td>Initial version released prior to the launch of the system on August 4, 2010.</td>
</tr>
<tr>
<td>1.01</td>
<td>August 26, 2010</td>
<td>Minor change to screenshots.</td>
</tr>
<tr>
<td>1.02</td>
<td>September 28, 2010</td>
<td>Added section 4.8 View Ministry Contacts.</td>
</tr>
<tr>
<td>1.03</td>
<td>May 2011</td>
<td>Added system steps to 4.5 De-Activating Service Provider Users.</td>
</tr>
</tbody>
</table>
| 1.04      | December 2011  | Added to 4.6.2 De-activating a User:  
  - The user needs to input a To date when removing a user from the system, regardless of how long they will be leaving the organization |
| 2.0       | January 2012   | Review and edits for Release 3.0                                                                                                                                                                           |
| 2.1       | April 2012     | Updates to:  
  - 4.2 Creating Service Provider Members  
  - 4.4.1 Modify Details  
  - 4.5 Resetting Pin  
  - 4.6 Deactivating Service Provider Users  
  - 4.6.1 Reassigning Service Plans  
  - 4.7 Reactivating a User  
  - 4.9 View Ministry Contacts |
| 2.2       | September 2012 | Incorporates changes for Release 3.1:  
  - 4.6.2 Reassigning Reviews(new section)  
  - 4.11 Creating and Modifying Service Provider Profile and Service Delivery Sites Contact Information |
| 2.3       | April 2013     | Incorporates changes for Release 3.2. New sections:  
  - 4.12 Assigning a user as an Ontario Self-Employment Benefit Case Reviewer  
  - 4.11.1 Assigning a Self Service Email Address |
<table>
<thead>
<tr>
<th>Version #</th>
<th>Date</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.4</td>
<td>August 2013</td>
<td>Updates to:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- 4.6 Deactivating Service Provider Users</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- 4.6.1 Reassigning Service Plans</td>
</tr>
<tr>
<td>2.5</td>
<td>July 2014</td>
<td>Updates to reflect new Release 4.0 user interface</td>
</tr>
<tr>
<td>2.6</td>
<td>March 2015</td>
<td>Updated chapter title to better reflect content</td>
</tr>
<tr>
<td>2.7</td>
<td>August 2015</td>
<td>Changes to screenshots</td>
</tr>
<tr>
<td>2.8</td>
<td>December 2015</td>
<td>Update to format and readability</td>
</tr>
<tr>
<td>2.9</td>
<td>May 2016</td>
<td>Updates to reflect Release 6.0</td>
</tr>
<tr>
<td>3.0</td>
<td>November 2016</td>
<td>Updates to reflect Release 6.3</td>
</tr>
<tr>
<td>3.1</td>
<td>June 2017</td>
<td>Updates to reflect Release 17.2</td>
</tr>
<tr>
<td>3.2</td>
<td>September 2017</td>
<td>Updates to reflect Release 17.3</td>
</tr>
<tr>
<td>3.3</td>
<td>December 2018</td>
<td>Updates screenshot for Curam V7 Upgrade</td>
</tr>
</tbody>
</table>
4.1 Introduction

The Case Management System (the system) is a component of the Employment Ontario Information System (EOIS) that supports the ministry and service providers in administering and delivering Employment Ontario programs and services. Both ministry and service provider staff are given access to the system to perform their identified roles.

The set-up of service provider users is initiated by the ministry through the establishment of individual service provider profiles. These profiles include information on the service provider at the corporate level and the service delivery site level. The service provider profile includes information on the organization’s legal name, business number, contact staff (called members) and service delivery site details. These profiles are used across the EOIS for the purpose of contract management, case management and reporting. The management of the service provider profile is a shared responsibility between the ministry and the service provider.

The ministry creates and maintains the core service provider and service delivery site data. The ministry must assign the system user role of Service Provider Manager or Service Provider Manager Non-Case to select service provider members. This system user role comes with the responsibility of the Service Provider Registration Authority (SPRA) business role. The member with the Service Provider Manager user role is the only person who can add, maintain and deactivate service provider members as system users, report users and contacts within their own service provider organization and associated service delivery sites. Only the ministry can add, maintain or deactivate the Service Provider Manager and Service Provider Manager Non-Case system user roles.

Each service provider is assigned a maximum number of users in the system. The system will not allow the Service Provider Manager to add users beyond this assigned number and will display an error message if this is attempted. If a change in the maximum number of users is required, the Service Provider Manager will have to contact his or her ministry representative.
4.2 Roles and Responsibilities

There are four types of Service Provider Members in the system:

1.) Service Provider Member - System User: A service provider member who is given a system user role. There are four system user roles that can be assigned to service provider members:

   Service Provider Manager (Ministry assigned only)
   - create, maintain and de-activate user accounts
   - maintain contact information in the service provider profile
   - create, view, update and close client profiles
   - create, view, update and close service plans
   - create, view and update resource and information data

   Service Provider Manager Non-Case (Ministry assigned only)
   - create, maintain and de-activate user accounts
   - maintain contact information in the service provider profile

   Service Provider Case Worker
   - create, view, update and close client profiles
   - create, view, update and close service plans

   Service Provider Administrator
   - create, view, update and close client profiles
   - create, view, update and close service plans
   - create, view and update resource and information data
   - maintain contact information in the service provider profile

2.) Service Provider Member - Non-System User: A key individual contact at a corporate service provider level such as an executive director or manager who does not require access to the system. These members are not counted in the maximum number of system users for each service provider.

3.) Service Delivery Site Member: A key individual contact at the service delivery site level who does not require access to the system. If service delivery site staff requires access to the system, he or she must become a service provider member to be assigned a system role.
4.) Service Provider Member – Reporting Role: A key individual contact at the corporate service provider level who does or does not require access to the system but requires access to the reporting tool for operational and performance reports.

The system’s use of the term “member” is synonymous with the business term “contact.” A member who is referred to as a system user has system access responsibility; not all members are system users.

The following table lists the actions that each system user role can perform in the Service Provider Management module of the system:

<table>
<thead>
<tr>
<th>Roles</th>
<th>Search/View Service Provider/Service Delivery Site</th>
<th>Modify Specific Service Provider Profile Information</th>
<th>Register/Modify Service Provider Members/Users</th>
<th>Register/Modify Service Delivery Site Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ministry Regional Administrator</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Service Provider Manager (SPRA)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Service Provider Manager Non-Case (SPRA)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Service Provider Caseworker</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Service Provider Administrator</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>
4.3 Creating Service Provider Members

The service provider member who has been given the business role of the Service Provider Registration Authority (SPRA) is assigned the Service Provider Manager or Service Provider Manager Non-Case system user roles by the ministry. This gives this member the authority to create, modify and deactivate members for their specific organization with both systems, non-system and reporting user roles. The Service Provider Manager system user role can only assign members with the system roles of Service Provider Caseworker and Service Provider Administrator and with the reporting roles of SP Manager and SP Staff.

Required Prerequisite Steps

- Before a service provider member can be set up as a system user, the member must complete the Service Provider Staff CaMS Registration form.
- The SPRA must validate the member’s identity and approve the Service Provider Staff CaMS Registration form.
- The service provider must not have exceeded the “License Allocation” that has been negotiated with their ministry representative. This number can be viewed on the Service Provider Home page in the Details information panel and compared to the system users displayed on the Service Provider Members page. Providers can have additional user accounts beyond their initial license allocation figure, if required. However, the provider needs to be aware that all users cannot be on the system at the same time. The maximum amount of users logged on to EOIS-CaMS at any one time is equal to their license allocation.

System Steps

☞ Step 1: Workspace Page
Click MY SERVICE PROVIDER in the My Shortcuts list to navigate to the Service Provider Home page.
Step 2: Service Provider Home Page
Click the Service Provider Members tab.

Service Provider Home:
IFIS Supplier Site

Step 3: Service Provider Members Page
Click NEW.
Step 4a: Create Service Provider Member-System user with or without a reporting role

Complete the required fields.

A unique email address must be entered for members assigned a **User Role**.

If a member is assigned a user role, there must be a unique email address entered for that member. This is critical as the system will generate two emails to that member to complete the registration process. The first email contains the ONe-key enrollment number and the second email contains the PIN and link to the ONe-key login page. The system will validate the uniqueness and format of the email address. The system will not allow the screen to be saved if this validation fails and will provide an error message.

If this member is the main contact for the service provider, select the **Main Contact** checkbox. The position field may also be completed, but it is optional.

To access the system, the service provider member requires a user role. Select the appropriate **CaMS Role**: Service Provider Caseworker or Service Provider Administrator.

To access reports, the service provider member also requires a reporting role. Select the appropriate **Reporting Role**: SP Manager or SP Staff. If a reporting role is not required, the field can be left blank.
Once completed, click SAVE.

 água Step 4b: Create Service Provider Member - Non-System user with or without a Reporting Role
Complete the required fields.

If this member is the main contact for the service provider, select the **Main Contact** checkbox. The position field may also be completed, but it is optional.

Since the service provider member does not require a system role, do not select any **CaMS Role** and leave the field blank. If this member requires a **Reporting Role**, select either the **Reporting Role** of SP Manager or SP Staff. If a reporting role is not required, leave this field blank as well.

Once completed, click SAVE.

 água Step 5a: Service Provider Member - System user
Click the appropriate NAME for the service provider member on the Service Provider Member page to ensure that all information is correct.
Step 5b: Service Provider Member - Non-System user

Click the appropriate NAME for the service provider member on the Service Provider Member page to ensure that all information is correct.
## Service Provider Members

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Login Enabled</th>
</tr>
</thead>
<tbody>
<tr>
<td>Michaela</td>
<td>Employment Consultant</td>
<td>No</td>
</tr>
<tr>
<td>Micheline</td>
<td>Job Developer</td>
<td>No</td>
</tr>
<tr>
<td><strong>Mindy</strong></td>
<td>Administrative Agent</td>
<td>No</td>
</tr>
<tr>
<td>Nuray</td>
<td>Employment Consultant</td>
<td>No</td>
</tr>
</tbody>
</table>

### Service Provider Member Home

#### Details

<table>
<thead>
<tr>
<th>Title</th>
<th>Ms.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Member Name</td>
<td>Mindy</td>
</tr>
<tr>
<td>Phone</td>
<td>(416)555-5555</td>
</tr>
<tr>
<td>Position</td>
<td>Administrative Agent</td>
</tr>
<tr>
<td>From</td>
<td>05/11/2018</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Preferred Language</th>
<th>English</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main Contact</td>
<td>No</td>
</tr>
<tr>
<td>Email</td>
<td>mjl</td>
</tr>
<tr>
<td>Status</td>
<td>Active</td>
</tr>
<tr>
<td>To</td>
<td></td>
</tr>
</tbody>
</table>

#### Service Provider User

<table>
<thead>
<tr>
<th>CnMS Role</th>
<th>Service Provider Case Worker</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Creation Date</td>
<td>05/11/2018</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Reporting Role</th>
<th>SP Staff</th>
</tr>
</thead>
</table>
4.4 Update Identity Verification

In order to verify the identity of SPRAs (aka Service Provider Managers), the system must capture a question and answer field on the Service Provider Member page. Service Provider Manager Users are able to update their own Challenge Question/Answer.

System Steps

キー Step 1: Service Provider Home Page
Click the Service Provider Members tab.

![Service Provider Home Page](#)

Service Provider Home:

IFIS Supplier Site

キー Step 2: Service Provider Members Page
Click the Service Provider Manager user’s own name.

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
<th>Can Update</th>
<th>Role Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Debra</td>
<td>Employment Consultant</td>
<td>No</td>
<td>Service Provider Case Worker</td>
</tr>
<tr>
<td>Gayla</td>
<td>Employment Consultant</td>
<td>No</td>
<td>Service Provider Manager</td>
</tr>
<tr>
<td>Jessica</td>
<td>Job Developer</td>
<td>No</td>
<td>Service Provider Case Worker</td>
</tr>
<tr>
<td>Julia</td>
<td>Employment Consultant</td>
<td>No</td>
<td>Service Provider Case Worker</td>
</tr>
</tbody>
</table>
Step 3: Service Provider Member Home Page

Click CHANGE next to **Challenge Question/Answer**

The **Challenge Question/Answer** is mandatory for all Service Provider Managers. This extra security step will aid ministry staff when a Service Provider Manager requests a PIN reset.

Step 4: Modify Service Provider Member Challenge Question Page

Enter **Challenge Question/Answer**, and click SAVE.
4.5 Modify Service Provider Members

The service provider member with the Service Provider Manager or Service Provider Manager Non-Case user role can modify other service provider member details and user roles (Service Provider Caseworker and Service Provider Administrator); however, if the Service Provider Manager user role has to be modified, the service provider member must contact the ministry.

All user roles have the ability edit their own Preferred Language and Challenge Question/Answer. To display the new selected language, the user must first log out, and then log back into the system.

For the Service Provider Caseworker role, users must use the FIND SERVICE PROVIDER action from the Shortcuts Panel and select their name from the Service Provider Members tab.
System Steps

❖ Step 1: Workspace Page
Click MY SERVICE PROVIDER from the **My Shortcuts** list to navigate to the Service Provider Home page.

❖ Step 2: Service Provider Home Page
Select the **Service Provider Members** tab.

❖ Step 3: Service Provider Members Page
Click **EDIT** from the **Action Button** next to the member that needs to be modified to navigate to that member’s home page.
4.5.1 Modify Details

Edit the fields in the Details information panel as required and click on save.

The email address has to be unique to that member.

4.5.2 Modify Phone Number

System Steps

☞ Step 1: Service Provider Members Page
Navigate to the Service Provider Member home page by clicking their NAME.

Step 2: Phone Numbers Page
To modify the phone number, click the Contact tab, and select EDIT from the Action Button next to the phone number.

Step 3: Modify Phone Number Page
Modify the phone number, and click SAVE.
4.5.3 Modify User Role

A Service Provider Manager can modify the user role of existing service provider members. Under the Service Provider User information panel, select the appropriate new CaMS Role: Service Provider Caseworker, Service Provider Administrator or leave the field blank for a non-system user.
Click SAVE. When the system role of a service provider member is changed, the member will be notified with an email confirmation. There is no email confirmation to the service provider member if the reporting role is changed.

If a member with a system role is changed to a non-system role, the system will disable the user ID in both the system and ONe-key. This means the user will no longer be able to access the system from the ONe-key home page.

If a member with a non-system role is changed to a system role and/or to a reporting role, the system will commence the registration process to access the system which involves the two emails for ONe-key enrollment and PIN generation.
4.6 Resetting User PIN

The system can only be accessed by a service provider user with a user PIN. If a service provider user forgets his or her PIN, it has to be reset by the member with the Service Provider Manager or Service Provider Manager Non-Case user role.

If a Service Provider Manager forgets his or her PIN, the ministry has to be contacted to have the PIN reset.

System Steps

‣ Step 1: Workspace Page
Click MY SERVICE PROVIDER from the My Shortcuts list to navigate to the Service Provider Home page.

Select the Service Provider Members tab.

Service Provider Home:

IFIS Supplier Site

‣ Step 2: Service Provider Members Page
Click the NAME of the member that needs to be modified to navigate to that member’s home page.
Step 3: Service Provider Member Page
From the Action Button, click RESET PIN.

Step 4: Reset Member PIN Page
Complete the Reason, and click RESET.

Step 5: Service Provider Home Page
The system will display a “PIN has been reset successfully” message.
The system will immediately send out an email to the user with their user ID. Forty eight hours after this email is sent, a second email will be sent to the user with their new PIN.
4.7 Deactivating Service Provider Users

When a service provider member no longer requires access to the system, their user account must be deactivated. The proper maintenance of users in the system will support access requirements and help regulate the assigned maximum number of users for each service provider.

A user cannot be deactivated if there are any active service plans, tasks or reviews associated with that user. These items have to be reassigned to other members of the service provider before proceeding with the de-activation. See Section 4.7.1 and Section 4.7.2 for instructions.

System Steps

ู่ Step 1: Workspace Page
Click MY SERVICE PROVIDER from the My Shortcuts list to navigate to the Service Provider Home page.

Select the Service Provider Members tab.

Service Provider Home:

IFIS Supplier Site

遘 Step 2: Service Provider Members Page
Click the NAME next to the member that needs to be modified to navigate to that member's home page.
Step 3: Service Provider Member

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

Step 4: Modify Service Provider Member Page

Remove both the **CaMS Role** and **Reporting Role** from the user's profile, and click **SAVE**.

Step 5: Service Provider Member Home Page

From the **Action Button**, click **DEACTIVATE**.
Step 6: Task Redirection Details Page

If a user has any tasks, they will need to be reassigned to another user. Click on the drop-down menu to display a list of active users belonging to the same service provider.

Step 7: Deactivate Service Provider Member Page

Click SAVE.

A warning message will appear if there are service plans, cases, tasks or reviews assigned to the user. These service plans, cases, tasks and reviews must be closed or reassigned before the user can be deactivated. See Section 4.7.1 and Section 4.7.2 for instructions.
Note that notifications are automatically deleted after 30 days, and there is no need to delete them prior to deactivating a user.

**Step 8: Service Provider Member Home Page**

The member’s status will change to “Inactive.”

### Service Provider Member Home

<table>
<thead>
<tr>
<th>Details</th>
<th></th>
<th>Details</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td></td>
<td>Preferred Language</td>
<td></td>
</tr>
<tr>
<td>Member Name</td>
<td>Mrs. Julie</td>
<td>Main Contact</td>
<td></td>
</tr>
<tr>
<td>Phone</td>
<td>(705)</td>
<td>Email</td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td>Consultant</td>
<td>Status</td>
<td>Inactive</td>
</tr>
<tr>
<td>From</td>
<td>18/08/2010</td>
<td>To</td>
<td>06/12/2018</td>
</tr>
</tbody>
</table>

### 4.7.1 Reassigning Service Plans

**Step 1: Workspace Page**

Click on REASSIGN CASES from the **My Shortcuts** list.
Step 2: Reassign Cases Page
Within the Current Owner panel, select the user who is currently the owner of the service plans, and then click SEARCH.

Step 3: Reassign Cases Page
All service plans assigned to the user will be displayed within the Search Results panel. From the New Owner dropdown, select the new user.

Step 4: Reassign Cases Page
From the Search Results panel, click the check boxes beside the service plans to be reassigned or click the top checkbox CASE REFERENCE to select all. Click TRANSFER.
The system will display a confirmation message asking the user: ARE YOU SURE YOU WANT TO TRANSFER THE CASE OWNERSHIP?

☞ Step 4a: Click CANCEL if you do not want to transfer the user’s cases
☞ Step 4b: Click OK if you do want to transfer the user’s cases

☞ Step 5: Reassign Cases Page
The system will display a confirmation message when the selected cases have been successfully reassigned. The user has the option to also reassign the user’s reviews.

☞ Step 5a: Click NO if you do not want to reassign the user’s reviews
☞ Step 5b: Click YES to reassign the user’s reviews.
4.7.2 Reassigning Reviews

Click on REASSIGN REVIEW from the My Shortcuts list and follow the same steps outlined in Section 4.7.1.

4.8 Reactivating Service Provider Users

System Steps

.gateway: Step 1: Workspace Page

Click MY SERVICE PROVIDER from the My Shortcuts list to navigate to the Service Provider Home page.

Select the Service Provider Members tab.
Step 2: Service Provider Members Page
Select the **Display Inactive Members** checkbox, and click SEARCH.

Step 3: Service Provider Members Page
Click the **NAME** of the member that needs to be modified to navigate to that member’s home page.

Step 4: Service Provider Member Home Page
From the **Action** Button, click **REACTIVATE**.
4.9 Creating Service Delivery Site Members
Service Delivery Site Member information is captured in the Service Provider Management module of the system. Service Delivery Site Members are not users of the system, but are contacts for the service delivery site.

System Steps

⚠️ Step 1: Workspace Page
Click MY SERVICE PROVIDER from the My Shortcuts list to navigate to the Service Provider Home page.

⚠️ Step 2: Service Provider Home Page
Click the REFERENCE NUMBER next to the appropriate Service Delivery Site.

⚠️ Step 3: Service Delivery Site Home Page
Select the **Service Delivery Site Members** tab.

![Service Delivery Site Members tab]

**Service Delivery Site Home**

**Service Provider**

- **Business Name**: COLLÈGE BORÉAL D’ARTS APPLIQUÉS ET DE TECHNOLOGIE

**Details**

<table>
<thead>
<tr>
<th>Service Delivery Site Name</th>
<th>College Boreal - Chelmsford</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preferred Language</td>
<td>English</td>
</tr>
</tbody>
</table>

**Step 4: Service Delivery Site Members Page**

Click NEW.

![Service Delivery Site Members page]

**Step 5: Create Service Delivery Site Member Page**

Complete the required fields, and click SAVE.
Members at the service delivery site level are contacts and do not have a system user role. If a service delivery site member needs to access the system, they must be set up as a member at the service provider level and given the appropriate user role, as outlined in Section 4.1.
4.10 Modifying Service Delivery Site Members

The Service Delivery Site Member information captured in the Service Provider Management module of the system can be modified.

4.10.1 Modify Details

System Steps

☞ Step 1: Service Delivery Site Members Page
Click EDIT from the Action Button next to the appropriate service delivery site member.

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Main Contact</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Iron Man</td>
<td></td>
<td>No</td>
<td>Active</td>
</tr>
</tbody>
</table>

☞ Step 2: Modify Service Delivery Site Member Page
Make the required modifications, and click SAVE.
4.10.2 Modify Main Contact

Only one main contact can exist for each service provider delivery site. In order to change the main contact, the original main contact has to be changed to a non-main contact. Navigate to the Service Delivery Site Members page, and edit the member who is currently recorded as the main contact, deselect the **Main Contact** checkbox, and click SAVE.

Edit an existing member or create a new member to become the new **Main Contact** by selecting the **Main Contact** checkbox and clicking SAVE.

It is important that each service delivery site has a **Main Contact** identified for ministry communication and administrative purposes. The initial **Main Contact** will be set up by the ministry when the service delivery site is registered in the system.
4.11 View Ministry Contacts

Service delivery sites that are performing services for the ministry are assigned a ministry contact. This contact is an internal CaMS user, who will manage the service delivery site to ensure that they are meeting their contractual obligations. If a service delivery site is unsure of their primary ministry contact, it can be located within the Service Delivery Site Home page.

Service providers can only view a ministry contact.

System Steps

⇒ Step 1: Service Delivery Site Home Page
Click the Services tab.

Service Delivery Site Home

<table>
<thead>
<tr>
<th>Business Name</th>
<th>COLLEGE BOREAL D'ARTS ET DE TECHNOLOGIE</th>
</tr>
</thead>
</table>

⇒ Step 2: Services Page
The ministry contact is located beside the corresponding service.

<table>
<thead>
<tr>
<th>Name</th>
<th>Start Date</th>
<th>End Date</th>
<th>Ministry Contact</th>
<th>Case Reviewer</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada-Ontario Job</td>
<td>14/11/2014</td>
<td></td>
<td>Marc Deken</td>
<td></td>
<td>Approved</td>
</tr>
</tbody>
</table>
4.12 Creating and Modifying Service Provider Profile and Service Delivery Sites Contact Information

While ministry users must create a service provider’s profile in the system, a number of additional fields within the service provider profile may be created or modified by service provider members who have the Service Provider Manager, Service Provider Manager Non-Case or Service Provider Administrator user roles. The following fields can be modified, at both the service provider and service delivery site levels:

- Phone Number
- Email Address
- Web Address

The service provider address can be viewed by all service provider users but can only be modified by ministry staff. The reason is to provide data integrity between the EOIS Contract Management System and the EOIS Case Management System. If the address of the service provider or the service delivery site needs to be changed, the service provider should contact their ministry contact as per the regular business process.

The addresses for the service provider and service delivery sites can be viewed on the associated Service Provider Home page and Service Delivery Site Home page(s) as well as under the relevant Contact tabs.

<table>
<thead>
<tr>
<th>Type</th>
<th>Address</th>
<th>City</th>
<th>Room</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business</td>
<td>21 LASALLE BLVD, SUDBURY, ON, P3A6B1</td>
<td>SUDBURY</td>
<td>15/05/2010</td>
<td>Active</td>
</tr>
<tr>
<td>Mailing</td>
<td>21 LASALLE BLVD, SUDBURY, ON, P3A6B1</td>
<td>SUDBURY</td>
<td>15/05/2010</td>
<td>Active</td>
</tr>
</tbody>
</table>
4.12.1 Assigning a Self Service Email Address

A specific email address must be assigned as “self service” in order for the Self Service Notifications checkbox on the Service Delivery Site Home page to be checked, and thus for email notifications to be received when Employment Ontario Self Service applications are submitted to the service delivery site.

Ensure that the email address is within the Contact folder of the service delivery site and not the service provider.

System Steps

🔑 Step 1: Service Delivery Site Home Page
Select the Contact tab.

🔑 Step 2: Service Delivery Site Contact Page
Click EMAIL ADDRESS in the tab content bar.
Step 3: Email Addresses Page
Click EDIT from the Action Button next to the email address that is to be assigned to self-service (or click NEW if none exist).

<table>
<thead>
<tr>
<th>Primary</th>
<th>Email Address</th>
<th>Type</th>
<th>Self Service</th>
<th>From</th>
<th>To</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td><a href="mailto:email@email.com">email@email.com</a></td>
<td>Business</td>
<td>Yes</td>
<td>17/05/2010</td>
<td></td>
<td>Active</td>
</tr>
</tbody>
</table>

Step 4: Modify Email Address Page
Enter the required information and ensure that Self Service Notification is checked. Click SAVE.

Modify Email Address
Once the email address is saved, the **Self Service Notifications** field on the Service Delivery Site Home page will be automatically checked, meaning both fields will have values of "yes" and email notifications will be received when EOSS applications are submitted to the service delivery site.

It is, however, important to note that both the **Self Service Notification** field on the Email Address page and the **Self Service Notifications** field on the Service Delivery Site Home page must be checked in order to receive email notifications. There may be cases where one has been unchecked.

### 4.12.2 Modifying the Service Delivery Site Home Page

Authorized service provider users have the ability to modify information by clicking **EDIT** from the **Action Button** on the Service Delivery Site Home page.

1. The language preference of the service delivery site.

2. The Geographic Region where the service delivery site is located. The region can be viewed by all service provider users but can only be modified by authorized ministry staff.

3. The preferred method of communication for the service delivery site (e.g. hardcopy, email, etc.).

4. The Available For Service checkbox indicates the service delivery site’s availability to accept Employment Ontario Self Service (EOSS) applications. For more information on EOSS Applications, see Chapter 11.

5. A Self Service Email Address must be assigned in order for the Self-Service Notifications checkbox to be checked (see Section 4.12.1).

6. The Self-Service Notifications checkbox determines whether a service delivery site will receive email notifications when EOSS applications are submitted.

7. A COJG Notification Email Address is mandatory if the service delivery site has a COJG service.

8. Utilizing Data File allows the ministry to capture if the service delivery site is using data files for reporting purposes. If a service delivery site wants to receive data files, they must select "Yes."
## Modify Service Delivery Site: College Boreal - Chelmsford - 4118A

### Details

<table>
<thead>
<tr>
<th>Service Delivery Site Name</th>
<th>College Boreal - Chelmsford</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preferred Language</td>
<td>English</td>
</tr>
<tr>
<td>Preferred Communication</td>
<td></td>
</tr>
<tr>
<td>Local Board Number</td>
<td>21</td>
</tr>
<tr>
<td>Self Service Notifications</td>
<td>Yes</td>
</tr>
<tr>
<td>Designated Francophone</td>
<td>No</td>
</tr>
<tr>
<td>Utilizing Data File</td>
<td>Yes</td>
</tr>
<tr>
<td>Geographic Region</td>
<td>Northern Region/Région du nord</td>
</tr>
<tr>
<td>Available For Service</td>
<td>Yes</td>
</tr>
<tr>
<td>Email Address</td>
<td><a href="mailto:email@email.com">email@email.com</a></td>
</tr>
<tr>
<td>COJG Notification Email Address</td>
<td><a href="mailto:dummy@test.com">dummy@test.com</a></td>
</tr>
</tbody>
</table>

### Comments

[Save] [Cancel]