

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



## **Chapter 4: Service Provider Information and User Management**

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## Document History

Version #	Date	Description
1.0	July 23, 2010	Initial version released prior to the launch of the system on August 4, 2010.
1.01	August 26, 2010	Minor change to screenshots.
1.02	September 28, 2010	Added section 4.8 View Ministry Contacts.
1.03	May 2011	Added system steps to 4.5 De-Activating Service Provider Users.
1.04	December 2011	Added to 4.6.2 De-activating a User: <ul style="list-style-type: none"> <li>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</li> </ul>
2.0	January 2012	Review and edits for Release 3.0
2.1	April 2012	Updates to: <ul style="list-style-type: none"> <li>4.2 Creating Service Provider Members</li> <li>4.4.1 Modify Details</li> <li>4.5 Resetting Pin</li> <li>4.6 Deactivating Service Provider Users</li> <li>4.6.1 Reassigning Service Plans</li> <li>4.7 Reactivating a User</li> <li>4.9 View Ministry Contacts</li> </ul>
2.2	September 2012	Incorporates changes for Release 3.1: <ul style="list-style-type: none"> <li>4.6.2 Reassigning Reviews(new section)</li> <li>4.11 Creating and Modifying Service Provider Profile and Service Delivery Sites Contact Information</li> </ul>
2.3	April 2013	Incorporates changes for Release 3.2. New sections: <ul style="list-style-type: none"> <li>4.12 Assigning a user as an Ontario Self-Employment Benefit Case Reviewer</li> <li>4.11.1 Assigning a Self Service Email Address</li> </ul>

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Version #	Date	Description
		Updates to: <ul style="list-style-type: none"><li>• 4.6 Deactivating Service Provider Users</li><li>• 4.11.2 Modifying the Service Delivery Site Home Page</li><li>• 4.13 Field Values Table</li></ul>
2.4	August 2013	Updates to: <ul style="list-style-type: none"><li>• 4.6 Deactivating Service Provider Users</li><li>• 4.6.1 Reassigning Service Plans</li></ul>
2.5	July 2014	Updates to reflect new Release 4.0 user interface
2.6	March 2015	Updated chapter title to better reflect content
2.7	August 2015	Changes to screenshots
2.8	December 2015	Update to format and readability
2.9	May 2016	Updates to reflect Release 6.0
3.0	November 2016	Updates to reflect Release 6.3
3.1	June 2017	Updates to reflect Release 17.2
3.2	September 2017	Updates to reflect Release 17.3
3.3	December 2018	Updates screenshot for Curam V7 Upgrade

### 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.

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- 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:

<b>Roles</b>	<b>Search/View Service Provider/Service Delivery Site</b>	<b>Modify Specific Service Provider Profile Information</b>	<b>Register/Modify Service Provider Members/Users</b>	<b>Register/Modify Service Delivery Site Members</b>
Ministry Regional Administrator	Yes	Yes	Yes	Yes
Service Provider Manager (SPRA)	Yes	Yes	Yes	Yes
Service Provider Manager Non-Case (SPRA)	Yes	Yes	Yes	Yes
Service Provider Caseworker	Yes	No	No	No
Service Provider Administrator	Yes	Yes	No	No

### 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

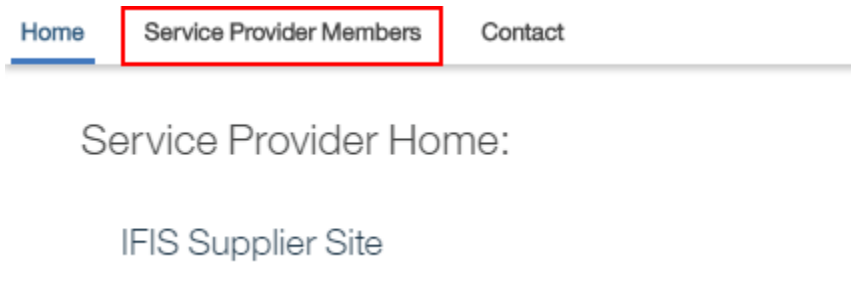
##### ➤ Step 1: Workspace Page

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

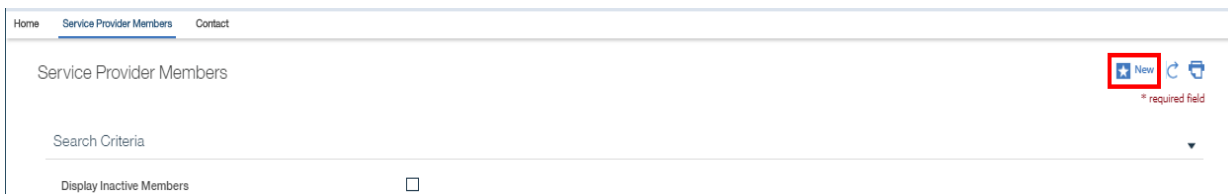




➡ Step 2: Service Provider Home Page  
Click the **Service Provider Members** tab.



➡ Step 3: Service Provider Members Page  
Click NEW.



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➡ Step 4a: Create Service Provider Member-System user with or without a reporting role  
Complete the required fields.

**Create Service Provider Member** ✕

---

\* required field

Details ▼

Title *	Ms.	Preferred Language *	English
Member Name *	Mindy	Main Contact	<input type="checkbox"/>
Email *	m.lir	Position	Administrative Agent
From	06/11/2018		
Area Code *	416	Local Number *	5555555
Extension		TTY	<input type="checkbox"/>

Service Provider User ▼

CaMS Role	Service Provider Case Worker
SPC Role	
Reporting Role	SP Staff

Identity Verification ▼

Challenge Question/Answer

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.

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Once completed, click SAVE.

## ➡ Step 4b: Create Service Provider Member- Non-System user with or without a Reporting Role

Complete the required fields.

**Create Service Provider Member** ⓧ

---

\* required field

Details ▼

Title *	Ms. ▼	Preferred Language *	English ▼
Member Name *	Mindy	Main Contact	<input type="checkbox"/>
Email *	m.lir	Position	Administrative Agent
From	06/11/2018		
Area Code *	416	Local Number *	5555555
		Extension	
		TTY	<input type="checkbox"/>

Service Provider User ▼

CaMS Role	▼
SPC Role	▼
Reporting Role	▼

Identity Verification ▼

Challenge Question/Answer	▼
---------------------------	---

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.

## ➡ 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.

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[Home](#)   [Service Provider Members](#)   [Contact](#)

## Service Provider Members

<a href="#">Michaela</a>	Employment Consultant	No
<a href="#">Micheline</a>	Job Developer	No
<a href="#">Mindy</a>	Administrative Agent	No
<a href="#">Nuray</a>	Employment Consultant	No

[Home](#)   [Contact](#)

## Service Provider Member Home

### Details

Title	Ms.	Preferred Language	English
Member Name	Mindy	Main Contact	No
Phone	(416)555-5555	Email	m.li
Position	Administrative Agent	Status	Active
From	05/11/2018	To	

### Service Provider User

CaMS Role	Service Provider Case Worker	Reporting Role	SP Staff
User Creation Date	05/11/2018	SPC Role	

## ➡ 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.

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[Home](#)   [Service Provider Members](#)   [Contact](#)

---

## Service Provider Members

<a href="#">Michaela</a>	Employment Consultant	No
<a href="#">Micheline</a>	Job Developer	No
<a href="#">Mindy</a>	Administrative Agent	No
<a href="#">Nuray</a>	Employment Consultant	No

[Home](#)   [Contact](#)

---

## Service Provider Member Home

### Details

Title	Ms.	Preferred Language	English
Member Name	Mindy	Main Contact	No
Phone	(416)555-5555	Email	m.li
Position	Administrative Agent	Status	Active
From	05/11/2018	To	

### Service Provider User

CaMS Role	Service Provider Case Worker	Reporting Role	SP Staff
User Creation Date	05/11/2018	SPC Role	

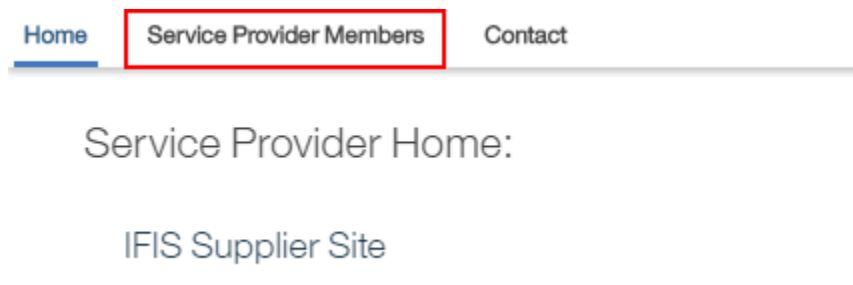
## 4.4 Update Identity Verification

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

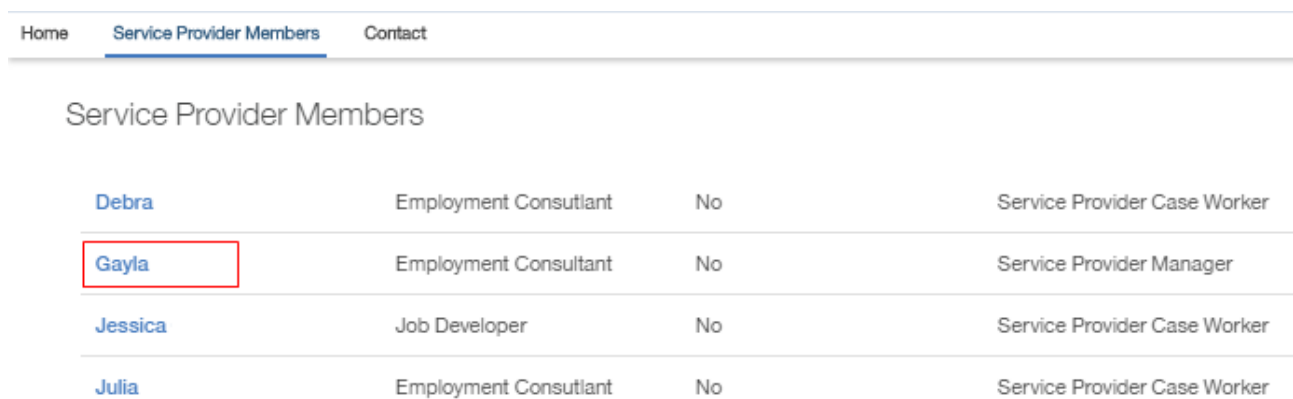
➡ Step 1: Service Provider Home Page

Click the **Service Provider Members** tab.



➡ Step 2: Service Provider Members Page

Click the Service Provider Manager user's own name.



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## ➔ 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.

Home Contact

---

Service Provider Member Home

Details

Title	Ms.	Preferred Language	English <a href="#">Change</a>
Member Name	Gayla	Main Contact	No
Phone	(613)541-XXXX	Email	hbzr.
Position	Employment Consultant	Status	Active
From	28/07/2010	To	

Service Provider User

CaMS Role	Service Provider Manager	Reporting Role	SP Manager
User Creation Date	28/07/2010	SPC Role	SP Submission Authority

Identity Verification

Challenge Question/Answer	Father's middle name/Grant <a href="#">Change</a>
---------------------------	---

## ➔ Step 4: Modify Service Provider Member Challenge Question Page

Enter **Challenge Question/Answer**, and click SAVE.

**Modify Service Provider Member Challenge Question:** ⓧ

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\* required field

Identity Verification ▼

---

Challenge Question/Answer

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## 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.

The screenshot shows the EOIS-CaMS interface. At the top, there are tabs for 'Workspace', 'Cases and Outcomes', 'Tasks', and 'Calendar'. Below these is a 'Shortcuts' panel with a red box around the 'Find Service Provider' option. The main content area shows a list of 'Service Provider Members' with columns for Name, Position, Status, Case Type, and Staff. Below this is a 'Service Provider Member Home' section for 'Ashley' with a table of details and a 'Details' dropdown menu with an 'Edit...' option highlighted by a red box.

Name	Position	Status	Case Type	Staff
Ashley	Employment Consultant	No	Service Provider Case Worker	SP Staff

Details			
Title	Mr.	Preferred Language	English
Member Name	Ashley	Main Contact	No
Phone	(613)542-	Email	btimfz.
Position	Employment Consultant	Status	Active
From	01/03/2018	To	



# EOIS-CaMS: Service Provider User Guide

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## System Steps

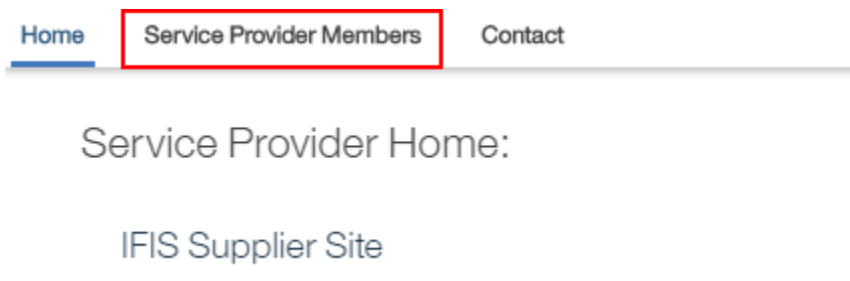
### ➤ Step 1: Workspace Page

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.

# EOIS-CaMS: Service Provider User Guide

Home [Service Provider Members](#) [Contact](#)

Service Provider Members New Refresh Print  
\* required field

Search Criteria ▼

Display Inactive Members

[Search](#) [Reset](#)

Name	Position	Main Contact	CaMS Role	Reporting Role	SPC Role	Status	
<a href="#">Alicia</a>	Support Staff	No	Service Provider Case Worker	SP Staff		Active	...
<a href="#">Ashley</a>	Employment Consultant	No	Service Provider Case Worker	SP Staff		Active	<b>Edit...</b>
<a href="#">Brandy</a>	Employment Consultant	No	Service Provider Case Worker	SP Staff		Active	...

## 4.5.1 Modify Details

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

**Modify Service Provider Member** ✕

---

\* required field

Details ▼

Title *	<input type="text" value="Miss"/>	Preferred Language *	<input type="text" value="English"/>
Member Name *	<input type="text" value="Alicia"/>	Main Contact	<input type="checkbox"/>
Email *	<input type="text" value="bmj"/>	Position	<input type="text" value="Support Staff"/>
From	<input type="text" value="19/06/2017"/>		

Service Provider User ▼

CaMS Role	<input type="text" value="Service Provider Case Worker"/>	Reporting Role	<input type="text" value="SP Staff"/>
SPC Role	<input type="text"/>		

[Save](#) [Cancel](#)



The email address has to be unique to that member.

## 4.5.2 Modify Phone Number

### System Steps

- ➔ Step 1: Service Provider Members Page

# EOIS-CaMS: Service Provider User Guide

Navigate to the Service Provider Member home page by clicking their NAME.

Home **Service Provider Members** Contact

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### Service Provider Members

<b>Ashley</b>	Employment Consultant	No	Service Provider Case Worker	SP Staff
---------------	-----------------------	----	------------------------------	----------

## ➡ 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.

Home **Contact**

---

### Service Provider Member Home

Details

Title	Mr.
Member Name	Ashley
Phone	(613)542-
Position	Employment Consultant
From	01/03/2018

Phone Numbers ★ New ↻ 🖨

Type	Phone Number	TTY	From	To	Status	
▶ Primary	613-542-	No	01/03/2018		Active	⋮ <b>Edit...</b>

## ➡ Step 3: Modify Phone Number Page

Modify the phone number, and click SAVE.

# EOIS-CaMS: Service Provider User Guide

## Modify Phone Number



\* required field

Details

Type Primary

From 01/03/2018 To

Phone Number

Phone Number \* 613-542- TTY

Comments

Save

Cancel

### 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.

## Modify Service Provider Member



\* required field

Details

Title \* Mr. Preferred Language \* English

Member Name \* Ashley Main Contact

Email \* btimfz. Position Employment Consultant

From 01/03/2018

Service Provider User

CaMS Role Service Provider Case Worker Reporting Role SP Staff

SPC Role

- Service Provider Case Worker
- Service Provider Administrator

Save

Cancel

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.

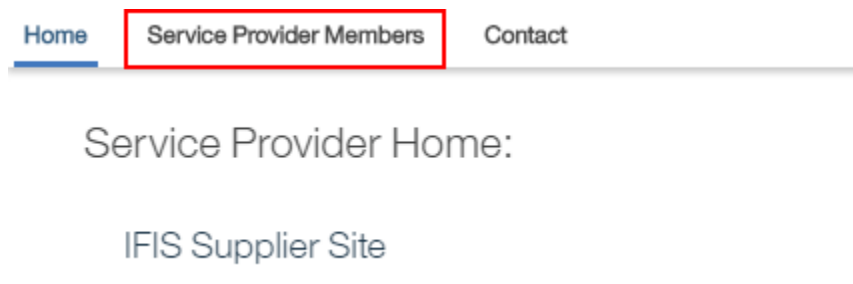
If a Service Provider Manager forgets his or her PIN, the ministry has to be contacted to have the PIN reset.

### 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.

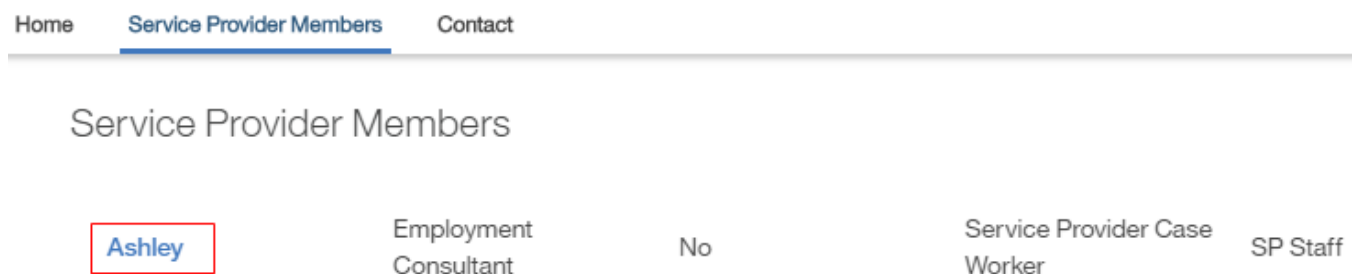


Service Provider Home:

IFIS Supplier Site

#### ➡ Step 2: Service Provider Members Page

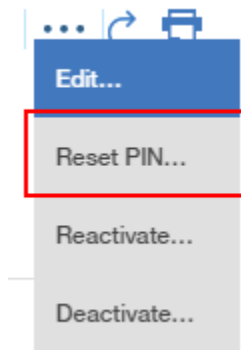
Click the NAME of the member that needs to be modified to navigate to that member's home page.



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➡ 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.

### Reset Member PIN ✕

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\* required field

Reason

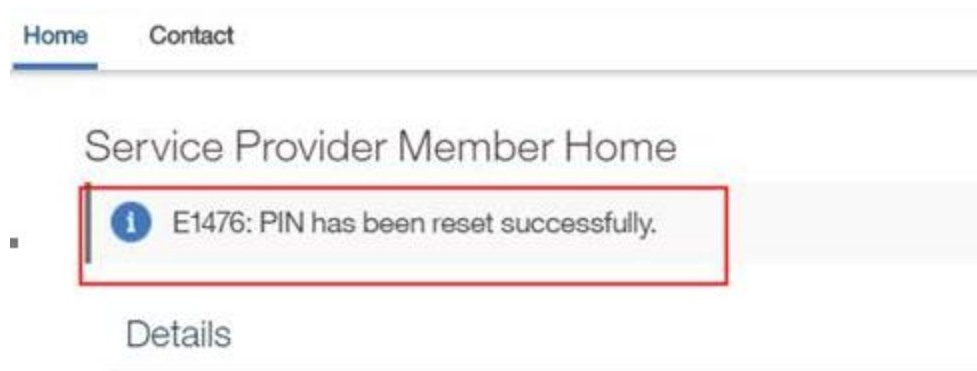
Identity Verification ▼

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Challenge Question/Answer Where did I go to Highschool./Fenelon Falls

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➡ 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.



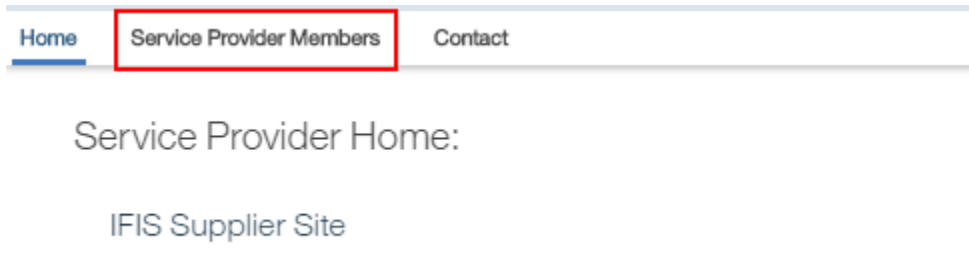
A user cannot be deactivated if there are any active service plans, tasks or reviews associated with that user. These items have to be reassigned to other members of the service provider before proceeding with the de-activation. See Section 4.7.1 and Section 4.7.2 for instructions.

### System Steps

#### ➡ Step 1: Workspace Page

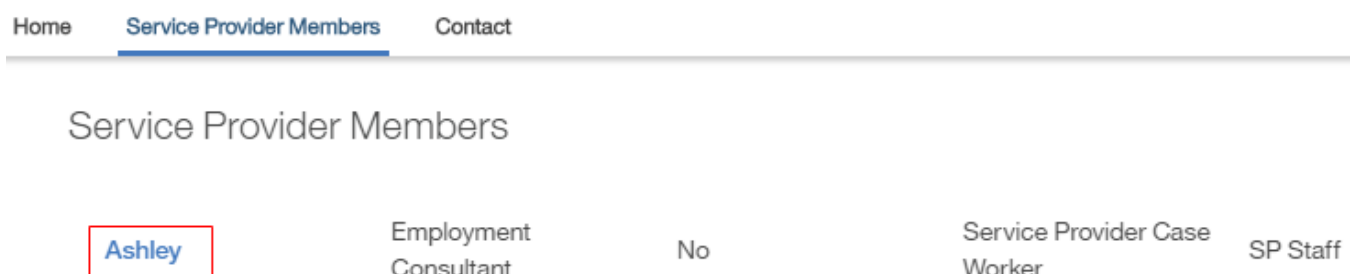
Click MY SERVICE PROVIDER from the **My Shortcuts** list to navigate to the Service Provider Home page.

Select the **Service Provider Members** tab.



#### ➡ Step 2: Service Provider Members Page

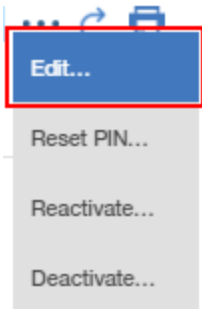
Click the NAME next to the member that needs to be modified to navigate to that member's home page.



# EOIS-CaMS: Service Provider User Guide

## ➤ 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.

**Modify Service Provider Member** ⓧ

\* required field

Details ▼

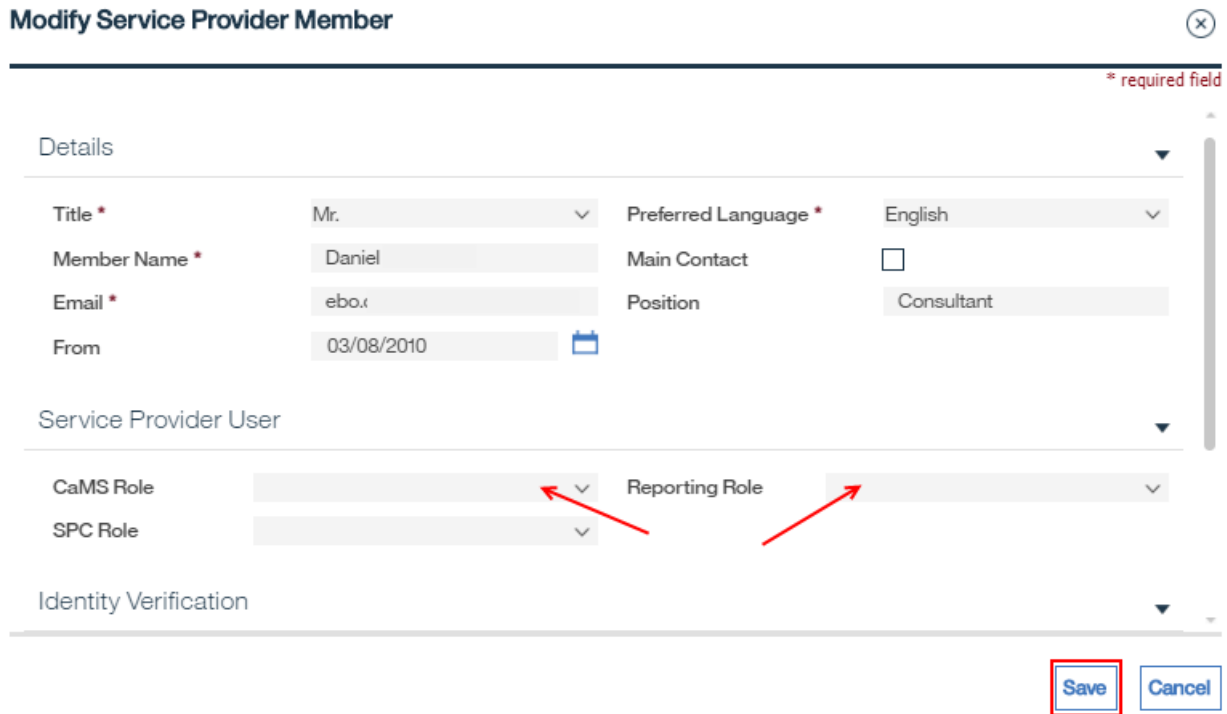
Title *	Mr. ▼	Preferred Language *	English ▼
Member Name *	Daniel	Main Contact	<input type="checkbox"/>
Email *	ebo.c	Position	Consultant
From	03/08/2010 		

Service Provider User ▼

CaMS Role	▼	Reporting Role	▼
SPC Role	▼		

Identity Verification ▼

Save Cancel



## ➤ Step 5: Service Provider Member Home Page

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

# EOIS-CaMS: Service Provider User Guide

Home Contact

---

Service Provider Member Home

Details

Title	Mr.	Preferred Language	English
Member Name	Daniel	Main Contact	No
Phone	(705)560-	Email	ebo.cs
Position	Consultant	Status	Active
From	03/08/2010	To	

... Edit... Reset PIN... Reactivate... **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.

### Task Redirection Details

Reassign Task To \*

## 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.

### Deactivate Service Provider Member



\* required field



E1998: Cannot Deactivate this user as active Case Reviews are assigned to this user.

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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

### Details

Title	Mrs.	Preferred Language	English
Member Name	Julie	Main Contact	No
Phone	(705)	Email	kvmjf.
Position	Consultante	Status	Inactive
From	19/08/2010	To	06/12/2018

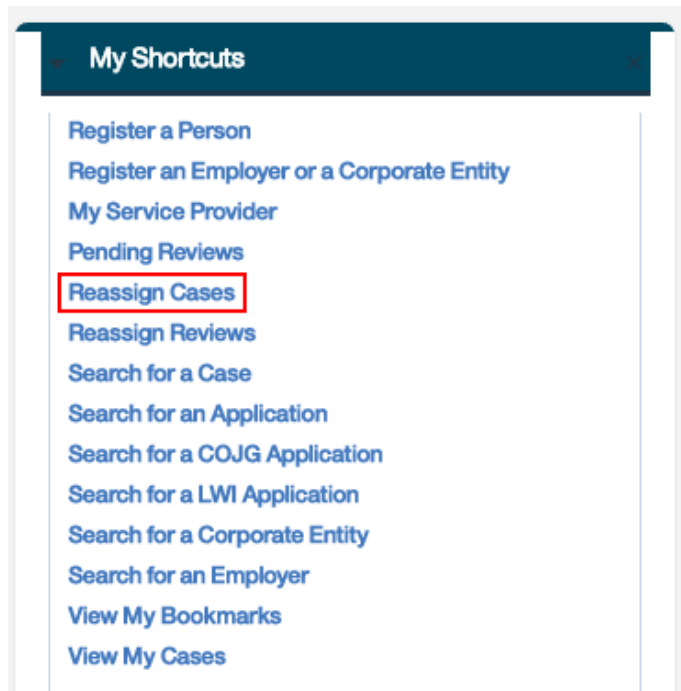
### Service Provider User

CaMS Role	Service Provider Case Worker	Reporting Role	SP Staff
User Creation Date	19/08/2010	SPC Role	

## 4.7.1 Reassigning Service Plans

### ➡ Step 1: Workspace Page

Click on REASSIGN CASES from the **My Shortcuts** list.



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## ➤ 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.

Reassign Cases

The screenshot shows the 'Reassign Cases' interface. Under the 'Current Owner' section, there is a dropdown menu with 'Julie' selected. To the right of the dropdown is a 'Display Closed Cases' checkbox, which is currently unchecked. Below the dropdown are three buttons: 'Search', 'Reset', and 'Cancel'. The 'Search' button is highlighted with a red rectangular box. Below this section is the 'Transfer To' section, which contains a 'New Owner' dropdown menu that is currently empty, and a 'Transfer' button below it.

## ➤ 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.

Reassign Cases



\* required field

This screenshot shows the 'Reassign Cases' page after a search. The 'Current Owner' dropdown still shows 'Julie'. The 'Search', 'Reset', and 'Cancel' buttons are present. In the 'Transfer To' section, the 'New Owner' dropdown menu now has 'Renata' selected, and this selection is highlighted with a red rectangular box. The 'Transfer' button is located below the dropdown menu.

## ➤ 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.

# EOIS-CaMS: Service Provider User Guide

## Reassign Cases

Current Owner

Current Owner

Julie

Display Closed Cases



Search

Reset

Cancel

Transfer To

New Owner

Renata

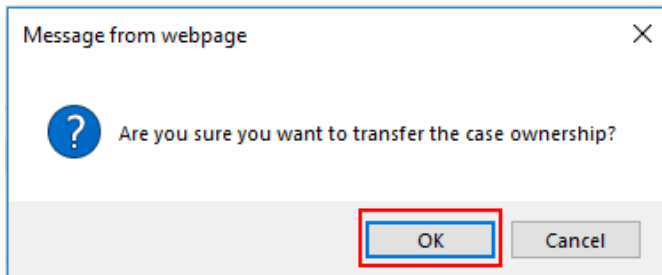
Transfer

Search Results (Number of Items: 30)

<input checked="" type="checkbox"/>	Case Reference	Primary Client	Program	Owner	Location/Service Delivery Site	Start Date	Closed Date	Status
<input checked="" type="checkbox"/>	600	Chantelle	Employment Service	Julie	College Boreal - Timmins	14/09/2018		Active
<input checked="" type="checkbox"/>	600	Randy	Employment Service	Julie	College Boreal - Timmins	14/09/2018		Active

The system will display a confirmation message asking the user: ARE YOU SURE YOU WANT TO TRANSFER THE CASE OWNERSHIP?

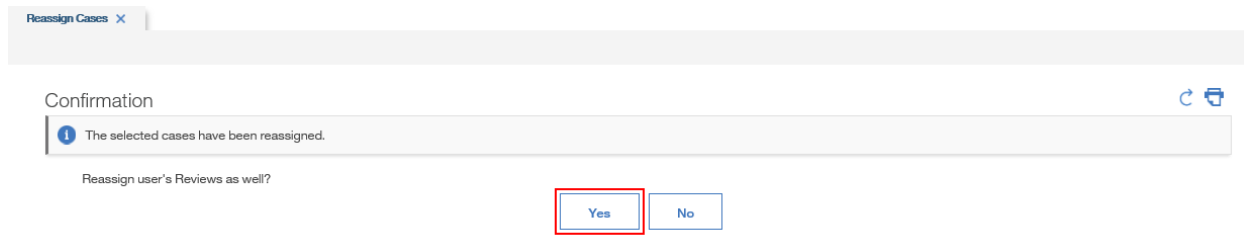
- Step 4a: Click CANCEL if you do not want to transfer the user's cases
- Step 4b: Click OK if you do want to transfer the user's cases



- Step 5: Reassign Cases Page

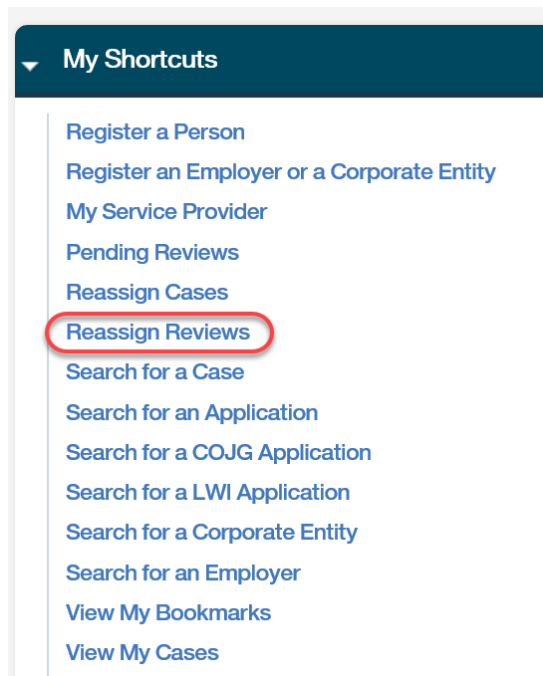
The system will display a confirmation message when the selected cases have been successfully reassigned. The user has the option to also reassign the user's reviews.

- 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

➔ 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.

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[Home](#) [Service Provider Members](#) [Contact](#)

---

Service Provider Home:

[IFIS Supplier Site](#)

---

## ➡ Step 2: Service Provider Members Page

Select the **Display Inactive Members** checkbox, and click SEARCH.

[Home](#) [Service Provider Members](#) [Contact](#)

---

Service Provider Members

Search Criteria

---

Display Inactive Members



Search

Reset

## ➡ 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.

[Home](#) [Service Provider Members](#) [Contact](#)

---

Service Provider Members

[Julie](#)

[Kim](#)

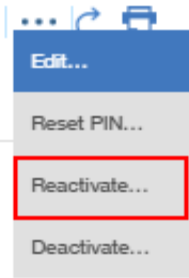
[Kossi](#)

[Lianne](#)

## ➡ Step 4: Service Provider Member Home Page

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





## ➤ Step 5: Reactivate Service Provider Member Page

Click SAVE.

### Reactivate Service Provider Member

---

Are you sure you want to Reactivate this Member?



## ➤ Step 6: Service Provider Member Home Page

The member's status has changed from "Inactive" to "Active."

[Home](#) [Contact](#)

---

### Service Provider Member Home

#### Details

---

Title	Mrs.	Preferred Language	English
Member Name	Julie	Main Contact	No
Phone	(705)	Email	kvn
Position	Consultante	Status	Active
From	19/08/2010	To	

Service Provider User

## 4.9 Creating Service Delivery Site Members

# EOIS-CaMS: Service Provider User Guide

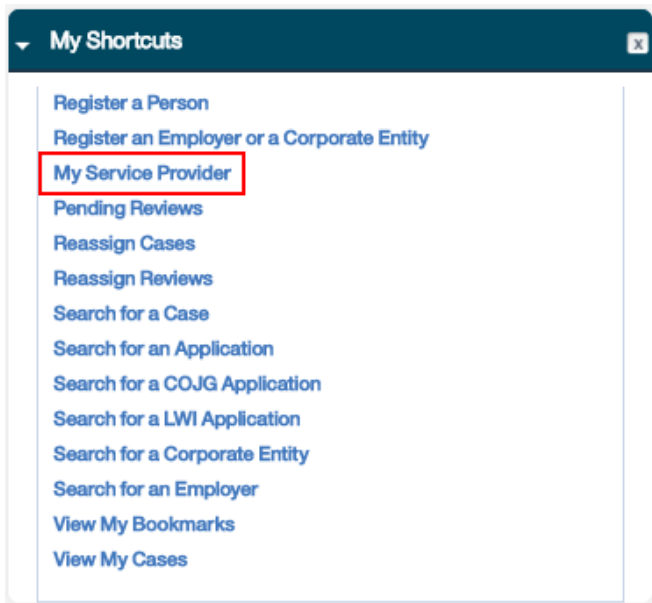
---

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

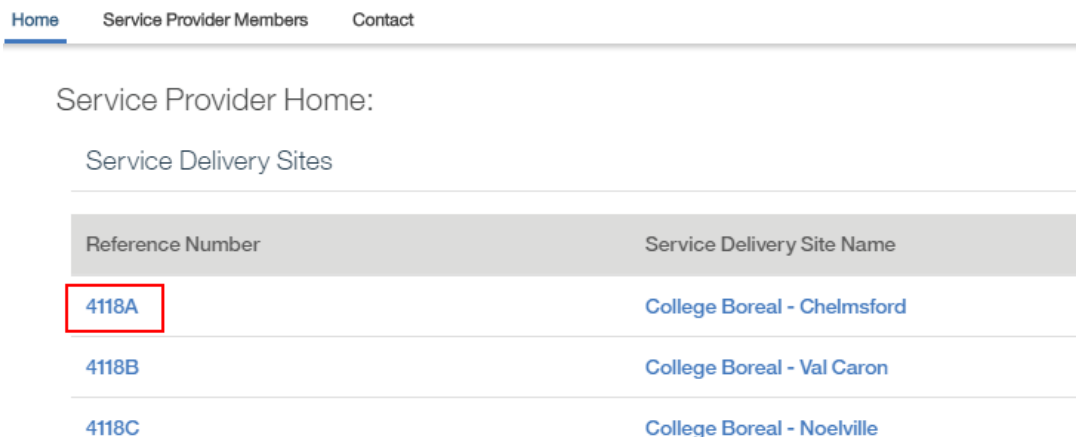
### ➤ Step 1: Workspace Page

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

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---

Select the **Service Delivery Site Members** tab.

Home Contact Services **Service Delivery Site Members**

---

Service Delivery Site Home

Service Provider

---

Business Name COLLÈGE BORÉAL D'ARTS APPLIQUÉS ET DE TECHNOLOGIE

Details

---

Service Delivery Site Name College Boreal - Chelmsford

Preferred Language English

➔ Step 4: Service Delivery Site Members Page

Click NEW.

Home Contact Services **Service Delivery Site Members**

---

Service Delivery Site Members ★ New ↻ 🖨

Name	Position	Main Contact	Status
------	----------	--------------	--------

➔ Step 5: Create Service Delivery Site Member Page


Complete the required fields, and click SAVE.

# EOIS-CaMS: Service Provider User Guide

## Create Service Delivery Site Member

\* required field

Details ▼

Title *	Mr. <span>▼</span>	Preferred Language *	English <span>▼</span>
Member Name *	Iron Man	Main Contact	<input type="checkbox"/>
Email *	iron@man.com	Position	
From	07/12/2018 		
Area Code *	555	Local Number *	555555
		Extension	
		TTY	<input type="checkbox"/>



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.

Name	Position	Main Contact	Status	
Iron Man		No	Active	...

Edit...

➔ Step 2: Modify Service Delivery Site Member Page

Make the required modifications, and click SAVE.

#### Modify Service Delivery Site Member

\* required field

Details

Title *	<input type="text" value="Mr."/>	Preferred Language *	<input type="text" value="English"/>
Member Name *	<input type="text" value="Iron Man"/>	Main Contact	<input type="checkbox"/>
Email *	<input type="text" value="iron@man.com"/>	Position	<input type="text"/>
From	<input type="text" value="07/12/2018"/>	To	<input type="text"/>

Comments

Save Cancel

## 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.

Home   Contact   Services   Service Delivery Site Members

---

Service Delivery Site Members

Name	Position	Main Contact	Status
Iron Man		No	Active

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.

Home Contact **Services** Service Delivery Site Members

---

Service Delivery Site Home

Service Provider

Business Name COLLÈGE BORÉAL D'ARTS ET DE TECHNOLOGIE

Details

#### ➔ Step 2: Services Page

The ministry contact is located beside the corresponding service.

Home Contact **Services** Service Delivery Site Members

---

Services

Name	Start Date	End Date	Ministry Contact	Case Reviewer	Status
Canada-Ontario Job Grant: Employer	14/11/2014		Marc Doiron		Approved

## 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.

Home Service Provider Members **Contact**

Address Addresses  

Type	Address	City	From	Status
▶ Business	21 LASALLE BLVD, SUDBURY, ON, P3A6B1	SUDBURY	15/05/2010	Active
▶ Mailing	21 LASALLE BLVD, SUDBURY, ON, P3A6B1	SUDBURY	15/05/2010	Active



## 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.

Home **Contact** Services Service Delivery Site Members

---

Service Delivery Site Home

Service Provider

---

Business Name COLLÈGE BORÉAL D'ARTS ET DE TECHNOLOGIE

Details

---

Service Delivery Site Name College Boreal - Chelmsford

#### ➡ Step 2: Service Delivery Site Contact Page

Click EMAIL ADDRESS in the tab content bar.

Home **Contact** Services Service Delivery Site Members

---

Address

**Email Address**

Phone Number

Web Address

Addresses

Type

- ▶ Business
- ▶ Mailing

# EOIS-CaMS: Service Provider User Guide

## ➔ 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).

Email Addresses New Refresh

Primary	Email Address	Type	Self Service	From	To	Status	
▶ Yes	email@email.com	Business	Yes	17/05/2010		Active	⋮ <span style="border: 1px solid red; padding: 2px;">Edit...</span>

## ➔ Step 4: Modify Email Address Page

Enter the required information and ensure that **Self Service Notification** is checked. Click SAVE.

### Modify Email Address

\* required field

Details

Address *	<input type="text" value="email@email.com"/>	Type *	Business
From *	<input type="text" value="17/05/2010"/>	To	<input type="text"/>
Primary	<input checked="" type="checkbox"/>	Self Service	<input checked="" type="checkbox"/>

Comments

Save Cancel



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.”

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## Modify Service Delivery Site: College Boreal - Chelmsford - 4118A

\* required field

### Details

Service Delivery Site Name	College Boreal - Chelmsford	Utilizing Data File	8 Yes
Preferred Language *	1 English	Geographic Region	2 Northern Region/Région du nord
Preferred Communication	3	Available For Service	4 <input checked="" type="checkbox"/>
Local Board Number	21	Email Address	5 email@email.com
Self Service Notifications	6 <input checked="" type="checkbox"/>	COJG Notification Email Address	7 dummy@test.com
Designated Francophone	No		

### Comments