Chapter 8H: Service Plan Management for Supported Employment
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## Document History

<table>
<thead>
<tr>
<th>Version #</th>
<th>Date</th>
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<tr>
<td>1.0</td>
<td>March 2018</td>
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<td></td>
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<td>Update to format and readability</td>
</tr>
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<td>1.1</td>
<td>September 2018</td>
<td>Update screenshots re Curam v7 Upgrade</td>
</tr>
<tr>
<td>1.2</td>
<td>January 2019</td>
<td>Appendix added listing sub-goals and plan items</td>
</tr>
<tr>
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<td>February 2019</td>
<td>Updated screenshots to reflect new fields in client summary and EO profile</td>
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8.1 Introduction

Note: This chapter deals exclusively with the Supported Employment (SE) service plan templates. For Employment Service (ES) service plans, refer to Chapter 8A. For the Literacy and Basic Skills (LBS) service plans, refer to Chapter 8B. For Canada-Ontario Job Grant (COJG) service plans, refer to Chapter 8C. For Youth Job Connection (YJC) and Youth Job Connection Summer (YJCS), refer to Chapter 8D. For Youth Job Link Service plans, refer to Chapter 8E. For SkillsAdvance Ontario (SAO), refer to Chapter 8F. For SkillsAdvance Ontario (SAO) Phase 2, refer to Chapter 8F2. For COJG Cloning, refer to Chapter 8G.

Employment Ontario service providers create road maps or plans for individuals and employers that detail the benefits and services that the service provider can deliver in order to meet clients' needs. Employment Ontario refers to this type of plan as a service plan. The service plan is a system tool that allows an Employment Ontario service provider to plan and manage the delivery of services and activities to help a client achieve a specific goal.

The primary reason for the creation of any service plan is to enable a client to achieve a specific goal. In most cases, a goal must be divided into steps that need to be attained in order to achieve the overall plan goal.

Building these steps individually provides a more manageable way of achieving the overall service plan goal. A case worker will have the ability to track all client participation, identifying any failure on behalf of the client to meet the required objectives. In this way, the service provider can measure the efficiency of both the client and the overall service plan.

8.2 Supported Employment (SE)

The Supported Employment program is designed for individuals who face complex barriers to employment as a result of a disability. The program offers a range of services and opportunities for people with disabilities to prepare for and secure employment. The goal of the program is to secure competitive and long-term employment.

In addition, Supported Employment provides a wide range of services and opportunities for employers to address staffing needs through matches with suitably skilled people with disabilities.

**Supported Employment provides a highly specialized set of services that can be customized to the needs of individual and employer clients. Given the unique needs of individual participants, sub-goals are not expected to be delivered in a predefined sequence. They may overlap with each other, based on individual need and circumstances. The degree of support and/or intensity of each service will vary by**
individual participants. Not all participants will need each sub-goal nor all the plan items within a given component.

8.3 Service Plan Structure

The service plan includes one goal for the overall service plan, one or more sub-goals, and one or more plan items for each sub-goal.

8.3.1 Goal

The goal is the primary objective or desired outcome of the service plan, which the client is working towards. The SE service plan goal is “Competitive and Long-term Employment”.

8.3.2 Sub-Goals

The goal can be broken down into a series of more manageable steps, the aim of which are to assist the client in achieving the overall goal. These steps are known as sub-goals, which will typically consist of one or more scheduled activities or plan items. The successful completion of some or all plan items is required to successfully attain a sub-goal.

The SE service plan sub-goals are:

- Client Service Planning and Coordination
- Employability Skills
- Job Search
- Job Matching and Development
- Job Coaching
- Job Retention

For more on SE sub-goals see, Appendix 2: Sub-Goals and Plan Items

8.3.3 Plan Items

Plan items are the fundamental building blocks of a service plan. For the most part, they are the activities added to a sub-goal in order to achieve the plan goal. Plan items can be configured with cost, outcome and start and end dates.

For more on SE plan items, see Appendix 2: Sub-Goals and Plan Items

8.4 Service Plan Template

The Ministry has created service plan templates based on SE program objectives and guidelines. The templates include a predefined set of sub-goals, which include plan items. Service providers must use these templates when creating service plans; however, a service
plan created from a template can still be customized to meet the individual requirements of a specific client, thus providing even greater flexibility.

8.4.1 Client Summary

A client summary is a mandatory element for each service plan and it captures details that are unique to the client.

8.4.2 Plan Summary

A plan summary is a mandatory element for each service plan and it details the activities that the client agrees to undertake to achieve their service plan goal. It reflects the structure of the plan and shows all activities listed under it. The plan summary may be printed for and accepted by the client but is not a binding agreement.

8.5 Roles and Responsibilities

The creation and management of service plans is the responsibility of service providers. Ministry users with appropriate system access may view, plan but cannot create or modify service plans. The following table lists the actions that each system user role can perform.

<table>
<thead>
<tr>
<th>Roles</th>
<th>Search/View Service Plan</th>
<th>Create Service Plan</th>
<th>Modify Service Plan</th>
<th>Close Service Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Provider Manager</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Service Plan Manager Non-Case</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Service Provider Caseworker</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Service Provider Administrator</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Ministry Manager</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Ministry Regional Administrator</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Ministry Caseworker</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

8.6 Building a Service Plan

The successful creation of a service plan requires the following steps to be performed in sequence and will be explained in this section.

1. Create a service plan from a template
2. Create a client summary
3. Add additional sub-goals (if required)
4. Add plan items to sub-goal(s)
5. Submit service plan for approval
6. Create plan summary
7. Record acceptance of plan summary

8.7 Create Service Plan

Prerequisite

The Employment Ontario Case must exist in order to create a service plan for a client. If one does not exist, refer to Chapter 6 for instructions on how to create an Employment Ontario Case.

For information on how to find an Employment Ontario Case within the system, refer to Case Search in Chapter 2.

System Steps

Note: A Supported Employment (SE) service plan cannot be created if a non-closed SE, service plan exists for the same client.

- Step 1: Employment Ontario Home Page
  Click NEW SERVICE PLAN from the Action Button.

System will prevent the user from creating a service plan if the client is deceased and the date of death has been recorded.

- Step 2: Create Service Plan Page
  Complete all fields. Select Supported Employment for the Program. For Referred In, use the drop-down menu to select the way in which the client came to be in the program. For the
Service Delivery Site, click on the drop-down menu and select the appropriate Service Delivery Site Name. If only one site delivers the selected service, it will automatically populate. The Service Delivery Site will populate on to the Create Service Plan page. The Transitional Client type field is unique to SE and must be indicated. Click SAVE.

 htmlentities(شعار)  Step 3: Service Plan Home Page

Ensure that all information in the service plan is correct.

The system auto-creates the six SE sub-goals that are used to administer the program. If required, the "Referral to Other Programs and Services" sub-goal can be added (refer to section 8.7.2).

Once a service plan has been created the status will be set to “Open”; this appears on the Service Plan Home page. A service plan can have various statuses. For a detailed description of status definitions and Service Plan Home page features, refer to Appendix 1.
If **Referred In** requires modifying, click **EDIT SERVICE PLAN from the Action Button** on the Service Plan Home page.

8.7.1 **Create Client Summary**

Only one client summary can be created per service plan. Please note that the client summary can be modified, but a new one cannot be created.

Use the Employment Ontario Participant Registration form to assist in completing the Client Summary.

**System Steps**

- **Step 1: Service Plan Home Page**
  
  Click the **Client Summary** tab.

- **Step 2: Client Summary Page**
  
  Click **NEW**

- **Step 3: Create Client Summary Page**
  
  The Client Summary captures client details unique to SE. Complete all fields, and click **SAVE**.
8.7.2 Add Additional Sub-Goal(s)

Adding a sub-goal is not a mandatory step for creating a service plan. For Supported Employment, adding a sub-goal would be used when the client is being referred to programs and/or services outside of the program. For example, the client is participating in Supported Employment but needs legal support on a personal item that is preventing them from successfully participating in the program. In this example, the ‘Referral Out to Other Community Resources’ sub-goal would be added in order to track the referral to legal services.

⚠️ Step 1: Service Plan Home Page
Click the Plan Content tab.
Step 2: Plan Content Page
Click NEW SUB-GOAL.

Step 3: Create Sub-Goal Page
Click SELECT next to “Referral Out to Other Community Resources” and the appropriate referral sub-goal.

Step 4: Add Sub-Goal Page
Click SAVE. Once saved, a number of different referral plan items can be added to the sub-goal.
8.7.3 Add Plan Item

Available Plan Items will depend on the sub-goal. As SE provides a highly specialized set of services that can be customized to the needs of the participant, not all plan items will be required to complete a sub-goal.

Fields on the Plan Item page will vary depending on the activity.

8.7.3.1 Add Plan Item

System Steps

_puts Step 1: Service Plan Home Page
Click the Plan Content tab.

_puts Step 2: Plan Content Page
From the Action Button next to the appropriate sub-goal, select ADD PLAN ITEM.
Step 3: Select Plan Item Type Page
Click the checkbox(es) beside the appropriate **Plan Item(s)**

Step 4: Add Plan Item Page
Complete fields as necessary. For **Expected Outcome**, if there is only one available option, this field will pre-populate. If this field does not pre-populate, there are multiple options; therefore, use the drop-down menu and select the appropriate value. For **Expected Start Date**
and **Expected End Date**, if these dates are known, please enter the correct dates; if not, use the default dates, and click on Save & Exit.

**8.7.3.2 Add Plan Item: Employability Skills**

There are some plan items that appear in more than one sub-goal. Arrange for Daycare, Arrange for Housing, Arrange for Personal Supports, Health, and Income Support plan items should be added under the Client Service Planning & Coordination sub-goal and not Job Search or Job Matching & Development. Job Trials, Job Shadow, and Volunteering plan items should be added under the Employability Skills sub-goal and not Job Search or Job Matching & Development. Add Plan Item: Employability Skills

Prerequisite

Follow steps 1 to 2 in Section 8.7.3.1 as it relates to the Employability Skills sub-goal.

춘 Step 3: Select Plan Item Type Page

In the list of plan items associated with the **Employability Skills** sub-goal, click the checkbox next to the appropriate Plan Item.
### Step 4: Add Plan Item Page

Complete fields as necessary. For **Expected Outcome**, if there is only one available option, this field will pre-populate. If this field does not pre-populate, there are multiple options; therefore, use the drop-down menu and select the appropriate value. For **Expected Start Date** and **Expected End Date**, if these dates are known, please enter the correct dates; if not, use the default dates, and click Save & Exit
Add Plan Item: SE Job Match Information

Prerequisite

The employer must be registered in the system. If the Employer is not registered, refer to the Employer Management chapter.

⚠️ The SE Employer Registration form is required to be completed for all SE Job Matches and Job Trials.

Follow steps 1 to 2 in Add Plan Item (Section 8.7.3.1.)

☞ Step 3: Select Plan Item Type Page

In the list of plan items associated with the Job Matching and Development sub-goal, click the checkbox next to SE Job Match.
### Step 4: Add Plan Item Page

Click on the magnifying glass icon to conduct an Employer Search.

### Step 5: Employer Search Page
Complete the appropriate fields, and click SEARCH.

**Employer Search**

Search Criteria

- Employer Reference Number
- Registered / Legal Name
- Trading / Business Name
- Business City
- Business Address Line 1

[Search] [Reset] [Cancel]

Search Results

<table>
<thead>
<tr>
<th>Action</th>
<th>Corporate Entity</th>
<th>Employer Reference Number</th>
<th>Trading / Business Name</th>
<th>Registered / Legal Name</th>
<th>Business City</th>
<th>Last Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1726525 Ontario Inc</td>
<td>1024000259</td>
<td>Jetsun’s Juicy Burger (1900 Eglinton)</td>
<td>1726525 Ontario Inc (Jetson’s Juicy Burger)</td>
<td>SCARBOROUGH</td>
<td>22/06/2016 12:25</td>
</tr>
</tbody>
</table>

**Step 6: Employer Search Page**

Click SELECT beside the appropriate employer.

**Step 7: Add Plan Item Page**

The **Employer** name will populate the Add Plan Item page. Complete fields as necessary. The **Expected Outcome** will pre-populate. For **Expected Start Date** and **Expected End Date**, if these dates have been defined, enter them; if not, use the default dates. Enter the **National Occupation Code (NOC)** and the North American Industry Classification Standardisation Code (**NAICS**) relating to the placement. Complete all the fields in the **Job Match Information** panel and click SAVE AND EXIT.
Note that when the plan item has an **Outcome** of “Attained,” the system will create a new employment record within the **Background** folder of the client profile. Modifications to this new record can only be made within the plan item. Also, this employment record will be set as the “Primary” record if one does not already exist for the client.

The **actual cost** of plan items reflects the funds a service provider is flowing to the client or employer to support the job placement. For example, participant flow-through funding may be used to cover the participant’s wages and expenditures for a job trial. **Actual cost** does not reflect the total salary earned by the client during the job placement.

### Add Plan Item: Supports

Up to $7,000 is available in financial supports per participant service plan for each individual/employer participating in the Supported Employment program. This maximum
amount can be used for a combination of supports for the employer and employment and training supports for the participant.

Follow steps 1 to 2 in **Add Plan Item** (Section 8.7.3.1.)

**Step 3: Select Plan Item Type Page**

In the list of plan items associated with the **Job Matching and Development** sub-goal, click the checkbox next to the appropriate support and click Continue.

**Select Plan Item Type**

<table>
<thead>
<tr>
<th>Financial Supports for Employers - Onboarding</th>
<th>Basic Plan Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Supports for Employers - other</td>
<td>Basic Plan Item</td>
</tr>
<tr>
<td>Financial Supports for Employers - Wage subsidy</td>
<td>Basic Plan Item</td>
</tr>
<tr>
<td>Financial Supports for Individuals - Academic Assessment</td>
<td>Basic Plan Item</td>
</tr>
<tr>
<td>Financial Supports for Individuals - Certification charges</td>
<td>Basic Plan Item</td>
</tr>
<tr>
<td>Financial Supports for Individuals - Child Care</td>
<td>Basic Plan Item</td>
</tr>
<tr>
<td>Financial Supports for Individuals - Clothing</td>
<td>Basic Plan Item</td>
</tr>
<tr>
<td>Financial Supports for Individuals - Diagnostic testing - General</td>
<td>Basic Plan Item</td>
</tr>
<tr>
<td>Financial Supports for Individuals - Diagnostic testing - Other</td>
<td>Basic Plan Item</td>
</tr>
<tr>
<td>Financial Supports for Individuals - Language Assessment</td>
<td>Basic Plan Item</td>
</tr>
<tr>
<td>Financial Supports for Individuals - Other</td>
<td>Basic Plan Item</td>
</tr>
<tr>
<td>Financial Supports for Individuals - Special Equipment</td>
<td>Basic Plan Item</td>
</tr>
<tr>
<td>Financial Supports for Individuals - Translation of Academic documents</td>
<td>Basic Plan Item</td>
</tr>
<tr>
<td>Financial Supports for Individuals - Transportation</td>
<td>Basic Plan Item</td>
</tr>
<tr>
<td>Financial Supports for Individuals - Workplace Assistance for Addiction Treatment</td>
<td>Basic Plan Item</td>
</tr>
</tbody>
</table>

**Step 4: Add Plan Item page**

Complete the necessary fields. For **Expected Outcome**, if there is only one available option, this field will pre-populate. If this field does not pre-populate, there are multiple options; therefore, use the drop-down menu and select the appropriate value. The **Estimated Cost** is a required field and must be completed. Once done click Save & Exit.
When a client is completing an activity that is not captured in the available plan items, the plan item ‘Other’ can be used. For example, if the client is attending anger management workshops, this could be recorded uses the plan item ‘Other’.

Prerequisite

Follow steps 1 to 2 in **Add Plan Item** (Section 8.7.3.1)

** Step 3: Select Plan Item Type Page**

In the list of plan items associated with the appropriate sub-goal, click the checkbox next to Other and click Continue.
## Step Four: Add Plan Item page

Complete the necessary fields. For **Expected Outcome**, if there is only one available option, this field will pre-populate. If this field does not pre-populate, there are multiple options; therefore, use the drop-down menu and select the appropriate value. Use the **Comments** section to include information about what the client will be doing. When done, click Save & Exit.
8.7.4 Submit for Approval

Prerequisites

The client summary is required before a service plan can move to “Approved” status. If the system does not find a client summary, an error will occur. The client’s Social Insurance Number is also required for SE. If one was not entered during client registration, please refer to Chapter 6 for instructions on how to capture the SIN for the client.

System Steps

 обязать Step 1: Service Plan Home Page
Review the service plan, and select SUBMIT FOR APPROVAL from the Action Button.

 обязать Step 2: Submit Service Plan Page
When prompted to confirm the submission, click YES.

8.7.5 Create Plan Summary

Step 1: Service Plan Home Page
Click the Plan Summary tab.

Step 2: Plan Summary Page
Click NEW.

Step 3: Plan Summary Page
The plan summary has been created. The system populated the summary using the client and the client’s address. As well, the **Issued Date** is set to the current date and the **Reason** is set to “Initial.”

Click SELECT.

### Step 4: Plan Summary Home Page

Confirm information is correct. To print the plan summary, select DOWNLOAD PLAN IN ENGLISH or DOWNLOAD PLAN IN FRENCH (depending on the language the client prefers) from the **Action Button**.

![Plan Summary Home Page](image)

#### 8.7.6 Record Plan Summary Acceptance

.squeeze

- **Step 1: Service Plan Home Page**

Click the **Plan Summary** tab.

- **Step 2: Plan Summary Page**

Click SELECT next to the plan summary that requires a date signed.
Step 3: Plan Summary Home Page
From the Action Button, select EDIT.

Step 4: Modify Plan Summary Details Page
To record plan summary acceptance, enter the Date Accepted in the Acceptance information panel.

To record plan summary rejection, enter the Date Rejected in the Rejection information panel, and select the reason from the Rejection Reason drop-down menu.

To record plan summary cancelled, enter the Date Cancelled in the Cancellation information panel, and select the reason from the Cancellation Reason drop-down menu.

Once all appropriate fields are complete, click SAVE.
Step 5: Plan Summary Home Page

The status has changed to “Accepted.”
8.7.6.1 Modify (Complete) Plan Items

✔ Step 1: Service Plan Home Page
Click the Plan Content tab.

✔ Step 2: Plan Content Page
Toggle the relevant sub-goal.

✔ Step 3: Plan Content Page
Click EDIT PLAN ITEM from the Action Button next to the relevant plan item.
Step 4: Modify Plan Item Page

Enter the **Actual Start Date** and **Actual End Date**. Select the appropriate **Outcome** from the drop-down menu. If applicable, enter an amount in **Actual Cost**. Click **SAVE**.

The sum of actual costs will display as **Total Supports** on the service plan home page for the following sub-goals and plan items:

**Job Matching and Development**
- Financial Supports for Individuals
- Financial Supports for Employers - Onboarding
Step 5: Plan Content Page

8.7.6.2 Delete Plan Items

If a plan item has a status of “In Progress” or “Completed,” it cannot be deleted; it can only be cancelled. Please refer to Section 8.6.6.3 Cancel Plan Item to perform this function. Once a plan item has been deleted, no record remains.

Delete plan item should be used when a plan item has been added to a client’s service plan in error.

System Steps
Step 1: Service Plan Home Page
Click the **Plan Content** tab.

Step 2: Plan Content Page
Toggle the relevant sub-goal.

Step 3: Plan Content Page
Click **DELETE PLAN ITEM** from the **Action Button** next to the relevant plan item. When prompted to confirm the delete, click **YES**.
Step 4: Plan Content Page

The deleted plan item will no longer appear with the associated sub-goal.

8.7.6.3  Cancel Plan Item

Cancel plan item should be used to reflect a change in the client’s plan. It can also be used if a plan was added in error to a client’s service plan but has already been modified to completed.

❖  Step 1: Service Plan Home Page

Click the **Plan Content** tab.

❖  Step 2: Plan Content Page

Toggle the relevant sub-goal.

❖  Step 3: Plan Content Page

Click **EDIT PLAN ITEM** from the **Action Button** next to the relevant plan item.
Step 4: Modify Plan Item Page

Select “Cancelled” from the **Outcome** drop-down menu. If an **Actual Start Date** has been previously entered and saved, delete the date. Click SAVE.

Step 5: Plan Content Page

The **Outcome** has changed to “Cancelled.”
8.7.7 Cancel Sub-Goal

❖ Step 1: Plan Content Page

From the **Action Button** next to the relevant sub-goal, select **EDIT SUB-GOAL**.

❖ Step 2: Modify Sub-Goal Page

Select “Cancelled “from the **Outcome** drop-down menu and click **SAVE**.
8.7.8 Delete Sub-Goal

A sub-goal can be deleted if client does not need to complete any of the plan items associated with it in order to achieve competitive and long-term employment (i.e. if there are no plan items added to a sub-goal when a service plan is being closed, it is recommend you delete the sub-goal).

A sub-goal cannot be deleted if there are plan items associated with it.
Step 1: Plan Content Page

From the **Action Button** next to the relevant sub-goal, select **DELETE SUB-GOAL**.

---

Step 2: Delete Sub-Goal Page

When asked to confirm the delete, click **YES**.

---

Step 3: Plan Content Page

The deleted sub-goal will no longer appear.

**8.7.8.1 Complete Sub-Goals**

**Prerequisite**

All associated plan items must have a status of “Completed” or “Cancelled.”

**Step 1: Plan Content Plan**

From the **Action Button** next to the relevant sub-goal, select **EDIT SUB-GOAL**.
Step 2: Modify Sub-Goal Page

Select the appropriate **Outcome** item from the drop-down menu, and click SAVE.

Step 3: Plan Content Page

The **Outcome** has changed.
8.7.9 Close Service Plan

If you close a service plan, it cannot be reopened.

If the Owner of the service plan is no longer an active user, they will be forced to change the Owner to an active CaMS user - for the auto-generation of reviews.

Financial Supports cannot be added to a closed service plan. A Service Plan should not be closed until it is anticipated that a client will no longer need support.

Prerequisite

A service plan can be closed when its Status is “Active”, and all plan items and sub-goals have outcomes saved; or it has not been activated and has a closure reason of “Opened in Error”, “Client Deceased”, or “Service Provider Closed”.

System Steps

Step 1: Service Plan Home Page

From the Action Button, click CLOSE.

Step 2: Close Service Plan Page

Complete all fields. The current case owner will default as the service plan Reviewer. To choose a different Reviewer, click on the magnifying glass and select the appropriate user.

Click Save.
The Closure Reason cannot be changed once the service plan has been closed with a reason of ‘Opened in Error’.

If Comments need to be added related to the closure reason, this can be inputted into the Change Closure Details page, which can be found in the Action Button on the Service Plan Home page.

واصل
Step 3: Close Service Plan Page
Click YES to close the service plan.
8.7.10 Reviews

Note that pending reviews can also be found using the PENDING REVIEWS link from the My Shortcuts list on the Workspace.

Unlike other Employment Ontario (EO) programs, SE reviews can occur when a service plan is both active and closed.

8.7.10.1 Active Service Plan Reviews

When an Employment Start Date is entered into SE Service Plan, CaMS will automatically trigger 3 reviews:

- Outcome at Employment Start
- Outcome at 3 Months
- Outcome at 12 months

The reviews will take place at 3, 6, 12, 18, and 24 month marks.

> Step 1: Service Plan Home Page

When an Employment Start Date is entered, the system automatically generates the 3 month follow-up review for SE. Once this review is complete, the system will then auto-generate reviews in a cascading fashion, until the final 24 month review follow-up.

Click the Events Tab.

> Step 2: List View Page

The review related to the service plan will appear in the Events list.
When an Employment End Date is entered into the SE Service Plan, CaMS will generate the Employment End follow-up reviews. Note: the Employment End Date should be no later than 12 months after the Employment Start Date.

8.7.10.2 Closed Service Plan Reviews

SE Reviews for closed Service Plans will be generated if the Service Plan is closed and there is no SE Job Match plan item recorded for the client.

➡️ Step 1: Service Plan Home Page

When a service plan is closed, the system will automatically generate the Exit follow-up review for SE. Once this review is completed, the system will then auto-generate reviews in a cascading fashion. For service plans, this means a 3-month review will not be generated until the Exit review is completed.

Click the Events tab.

➡️ Step 2: List View Page

The review related to the service plan will appear in the Events List.
Note: Follow-Up Reviews will happen for both the employer and participant for the Employment Start Date, Employment End Date, and 12 month follow up.

8.7.11 Create Review (Manually)

 собраное

Step 1: Service Plan Home Page
Click the Events tab.

 собраное

Step 2: Events Page
From the Action Button, select CREATE REVIEW.
Step 3: New Review Page

Use the magnifying glass icon to select the Reviewer, select a Reason from the drop-down menu, and enter a Scheduled Start Date at the desired time from the service plan closure date. The Expected End Date must be the same as the Scheduled Start Date. Click SAVE or SAVE & NEW.

Step 4: Events Page

Click the Case Review tab.
Step 5: Case Review Page

The **Case Review** list will display all reviews for the service plan. Click the toggle to view the details of the relevant case review.

### 8.7.12 Modify or Complete Review

**System Steps**

- **Step 1: Workspace Page**

  Click PENDING REVIEWS from the **My Shortcuts** list.
Step 2: Pending Reviews Page
Click on the REVIEW TYPE for the appropriate review.

Step 3: Events Page
Click Case Review tab and from the **Action Button**, click EDIT.

Step 4: Modify Review Page
Modify the necessary information, and click SAVE. For system generated reviews, the **Reason** cannot be modified and the system will display an error message at the top of the page.
If a client is deceased and the date of death is entered in the system, the system will prevent the user from updating an existing completed review and creating subsequent reviews.

✦ Step 5: View Review Page

If completed, the system will advise the user to update employment and education history accordingly and provides links to View Education and View Employment.
If a review needs to be removed, the Reason can be set to “Opened in Error.” This will ensure that it is filtered out of the relevant reports.
8.8 Appendix 1: Terms

8.8.1 Plan Item Cost

An estimated and actual cost can be maintained for a plan item. The estimated cost is the cost an organization expects to pay for the delivery of a service associated with a specific type of service plan item. The actual cost of a plan item is the amount paid by an organization to deliver the service associated with the plan item.

8.8.2 Expected Outcome

An expected outcome is the desired result of a plan item activity. For example, the expected outcome of a Placement with Incentive could be Employment. As part of the outcome-based approach to service planning, at least one expected outcome must be selected for each plan item.

8.8.3 Good Cause

Good cause is an acceptable reason why a plan participant did not achieve the expected outcome of a plan item (e.g., “Certified Illness”).

8.8.4 Service Plan Status

There are three types of service plan statuses: service plan status, plan summary status, and plan item status. Service plan and contract status are used to measure the status of the plan and the level of agreement between the organization and the client. Plan item status, on the other hand, is used to track the actual progress of activities within the plan. All three of the statuses change throughout the delivery of a service plan.

The following is a description of each service plan status:

Open – the status is “open” when a service plan is created.

Submitted – the status is “submitted” when the service plan is submitted for approval and is not automatically approved.

Approved – the status is “approved” when it is approved automatically or by an authorized user. If the service plan is rejected, the status returns to “open.”

Active – the status is “active” when a contract has been issued in respect of the service plan and accepted by the plan participant.

Closed – the status is “closed” when the service plan is manually closed by an authorized user.

8.8.5 Plan Summary Status
A plan summary has a status of “issued” when first created. A plan summary with this status is pending agreement between the relevant parties. The outcome of this agreement will change the plan summary status, and potentially the service plan status. A plan summary can either be “Accepted,” “Rejected,” or “Cancelled.” If rejected or cancelled, the service plan status is unaffected. If accepted, however, the service plan status becomes “active.”

8.8.6 Plan Item Status

A plan item’s status changes as the plan item progresses. Plan items which have been configured to require approval will pass through additional stages as part of this approval process. The following is a description of each plan item status:

Unapproved – used when plan items requiring approval are added to a service plan.

Submitted – used when an unapproved plan item is submitted for approval.

Not Started – used before a plan item is activated. Plan items which do not require approval will have a status of 'Not Started' when first created. Plan items requiring approval will have this status after they have been approved.

In Progress – used when an actual start date is recorded. Once in progress, the plan item is considered activated.

Completed – used when an actual end date is recorded.

8.8.7 Service Plan Outcomes

Service planning allows organizations to assign outcomes to service plans and service plan elements. The process of assigning outcomes starts with the recording of an expected outcome for each plan item. On completion of that plan item, an actual outcome of “attained,” “not attained,” or “cancelled” is recorded. Once an actual outcome has been recorded for each plan item, the outcome for the related sub-goal(s) can then be entered.

The service plan outcome is recorded when the outcomes for all sub-goals have been entered. This outcome defines whether or not the desired outcome of the service plan has been attained.

8.8.8 Service Plan Closure

A service plan is usually closed once all activities have been completed, but it can be closed at any time during its delivery. A closed service plan can still be accessed from the integrated case to which it was added.
8.8.9 Cost

Tracking the cost of a product or service is an essential part of service plan management. Plan item cost can be derived from the actual cost of delivering a plan item as entered by a caseworker.

A cost statement can be generated at any stage of the service plan delivery. It displays all estimated and actual costs involved in the delivery of a service plan at the time the statement is created. The expandable tree structured featured in the Tracking Gantt is also featured in the cost statement. For each element, the statement provides an estimated and actual cost, which allows for the comparison of these costs. The costs of the sub-goals, plan groups, and the overall plan are derived from the accumulated cost of the individual plan items.
8.9 Appendix 2: Sub-Goals and Plan Items

8.9.1 Client Service Planning and Coordination

Service providers must conduct individual assessments to work with the client to identify their employment goals and services the client will need in order to successfully participate in the program. The plan items in the Client Service Planning and Coordination sub-goal are to be used to reflect this work.

The available plan items in this sub-goal are:

- Service Needs Assessment
- Evaluate Foreign Credentials
- Prior Learning Assessment
- Professional Accreditation
- Support for Disclosure of Disabilities
- Arrange for Daycare
- Arrange for Housing
- Arrange for Personal Supports
- Health
- Income Support
- Other

It is expected that the goals and objectives of the supported employment service plan will continue to evolve as the participant proceeds through services and activities.

8.9.2 Employability Skills

Employability Skills are short-term interventions (i.e. workshops or other activities) designed to help participants in making the transition to work, maintain work, or develop career advancement. A key focus is on teaching soft skills while learning about the participant’s skills, abilities, career goals and their support needs.

Workshops or activities relating to the six employability skills service areas (section 2.6.2 Employability Skills of the Supported Employment Program Guidelines) would fall under this sub-goal. Job trials, job shadowing or short-term voluntary work experiences used to test a participant’s job readiness, help validate their work interests and skills, and identify any workplace accommodation or training needs, would also fall under this sub-goal.

The available plan items in this sub-goal are:

- Fundamental Job Readiness Skills
- Career Development/Career Exploration – General
8.9.3 Job Search

The activities that would fall under the Job Search sub-goal support a client with conducting an effective employment search and may involve applying skills acquired through employability skills activities.

The available plan items in the sub-goal are:

- Arrange for Daycare
- Arrange for Housing
- Arrange for Personal Supports
- Health
- Income Support
- Other
- Attend Workshop Job Search Strategies and Tools
- Assessing Qualifications Against Specific Job Requirements and the Labour Market
- Compile Portfolio
- Complete Job-Specific Resume
- Research Employers
- Research Occupations
- Conduct Cold Calls
- Job Applications/Applying to Specific Job Openings
- Job Trials
- Job Shadow
- Volunteering
- Network
- Obtain References
- Prepare for Interview
- Attend Job Interview
- Prior Learning Assessment
- Professional Accreditation
- Evaluate Foreign Credentials
Career Assessment – Ongoing
• Support for Disclosure of Disabilities
• Custom Basic Plan Item

8.9.4 Job Matching and Development

Job matching and development involves working with employers to determine their workforce needs and to identify program participants with the skills or work interests to address their staffing needs. The Job Matching and Development sub-goal is used to capture matches made between an employer and participant (whether it be a job trial, job match, or job shadow), financial support given to overcome barriers to the match (for either the participant or employer), and any training the participant needs in order to participate in the employment opportunity.

The available plan items in this sub-goal are:

• Arrange for Daycare
• Arrange for Housing
• Arrange for Personal Supports
• Health
• Income Support
• Other
• Assessment of Workplace Capacity – Initial Site Visit
• Job Trials
• SE Job Match
• Job Shadow
• Volunteer Work Experience
• Financial Supports for Individuals – Transportation
• Financial Supports for Individuals – Clothing
• Financial Supports for Individuals – Special Equipment
• Financial Supports for Individuals – Child Care
• Financial Supports for Individuals – Language Assessment
• Financial Supports for Individuals – Translation of Academic Documents
• Financial Supports for Individuals – Certification Charges
• Financial Supports for Individuals – Academic Assessment
• Financial Supports for Individuals – Other
• Financial Supports for Individuals – Diagnostic testing – General
• Financial Supports for Individuals – Diagnostic testing – Other
• Financial Supports for Individuals – Workplace Assistance for Assistive Devices
• Financial Supports for Individuals – Workplace Assistance for Adaptive Technology
• Financial Supports for Individuals – Workplace Assistance for Job-Specific Communication Skills Training
• Financial Supports for Individuals – Workplace Assistance for On-The-Job Supports
• Skills Enhancement Training – Driver’s License
• Skills Enhancement Training – Health and Safety
• Skills Enhancement Training – Technology
• Skills Enhancement Training – Employer-Specific
• Skills Enhancement Training – Other
• Financial Supports for Employers – Job-Released Skills Training
• Financial Supports for Employers – Onboarding
• Financial Supports for Employers – Employer and Staff Training
• Financial Supports for Employers – Job Trials
• Financial Supports for Employers – Wage Subsidy
• Financial Supports for Employers - Other

8.9.5 Job Coaching

The Job Coaching sub-goal will capture the activities related to preparing participants and employers for and employment start-date. It also captures activities related to ongoing support during employment.

The available plan items in this sub-goal are:

• Job Coaching for Participants – General
• Job Coaching for Participants – Support for Accommodations
• Job Coaching for Participants – Workplace Orientation and Culture
• Job Coaching for Participants – Skills Enhancement and job-Related Training
• Job Coaching for Participants – Workplace Standards and Expectations
• Job Coaching for Participants – Workplace Health and Safety Training
• Job Coaching for Participants – Mentorship and Peer Support
• Job Coaching for Participants – Issues Resolution
• Job Coaching for Participants – Crisis Response
• Job Coaching for Participants – Informal Network
• Job Coaching for Participants – Other
• Job Coaching for Employers – Understanding Disabilities
• Job Coaching for Employers – Sensitivity/Diversity/Inclusive
• Job Coaching for Employers – Support for Accommodations
• Job Coaching for Employers – Establishing Mentoring and peer Support Networks
• Job Coaching for Employers – Identification of Participant Skills enhancement and job-related Training Needs
• Job Coaching for Employers – Monitoring and Evaluating Job performance
• Job Coaching for Employers – Crisis Response
• Job Coaching for Employers - Other

8.9.6 Job Retention

Job retention offers supports for participants and employers who no longer require intensive level of job coaching, but are not fully independent in the job.

The available plan items in this sub-goal are:

• Develop Support Plan
• Workplace Issue – Task Assignment
• Workplace Issues – Workplace Integration
• Workplace Issues – Work Schedule
• Crisis Response
• Supporting Changes in Work Activities and Supervision
• Development of Natural Supports
• Career Development and Advancement

8.9.7 Referral to Other Programs and Services

• EO – Action Center
• EO – Apprenticeship Program – Co-op Diploma Apprenticeship Program
• EO – Apprenticeship Program – Other
• EO – Apprenticeship Program – Pre-Apprenticeship Program
• EO – Employment Service Provider
• EO – Service Provider – Other
• EO – Literacy and Basic Skills Provider
• EO – Youth Job Connection – Summer Service Provider
• EO – Youth Job Connection Service Provider
• EO – Youth Job Link Service Provider
• EO – Local Boards
• EO – Ontario Job Bank
• EO - RRTS
• General Education Development
• Government Services Municipal
• Government Training Federal – Other
• Government Training Federal – Youth Employment Strategy
• Government Training Provincial – Other
• High School
• Independent Learning Centre
• Language Services – Training
• Ministry of Citizenship and Immigration – Bridge Training for Immigrants
• Ministry of Citizenship and immigration – Other
• MCSS – Ontario Works Employment Assistance
• Ontario Disability Support Program
• Ontario Internship Program
• Ontario Women’s Directorate
• Ontario Works
• Other – Structured/Formal Referral
• Service Canada
• Service for indigenous People

8.9.8 Referral to Ministry Delivered Programs

• Referral to Feepayer
• Referral to Job Creation Partnership
• Referral to Second Career

8.9.9 Referral Out to Other Community Resources

• Child Care
• Educational/academic Services
• Financial Planning
• Health/Counselling Services
• Housing Services
• Language Services – Assessment
• Legal Services
• Newcomer Services
• Regulatory Bodies