Chapter 8B: Service Plan Management for Literacy and Basic Skills
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## Document History

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<td>Initial version released prior to the launch of the system to LBS providers in April, 2012.</td>
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| 1.1       | April 2012       | Modifications to sections:  
• 8.6.9 Close Service Plan  
• 8.6.10 Reviews  
• 8.6.11 Modify Reviews  
• 8.6.12 Complete Reviews |
| 1.2       | September 2012   | Incorporates changes for Release 3.1:  
• 8.6.5 Create Plan Summary  
• 8.6.9 Close Service Plan  
• 8.6.10 Reviews  
• 8.6.6.1 Modify Plan Items |
| 1.3       | April 2013       | Incorporates changes for Release 3.2:  
• 8.6.10 Reviews             |
| 1.4       | August 2013      | Modifications to section:  
• 8.6.3 Add Plan Item  
• 8.6.11 Modify Reviews   |
| 1.5       | September 2013   | Content updated to reflect launch of Enhanced Learner Plan:  
• 8.3.2 Learner Plan  
• 8.6.5 Create Plan Summary  
• 8.7 Enhanced Learner Plan |
| 1.6       | July 2014        | Updates to reflect new Release 4.0 user interface                                           |
| 1.7       | August 2015      | Update to:  
• 8.6 Create Service Plan  
• 8.6.11 Modify or Complete Review |
| 1.8       | October 2015     | Updated references to other chapters.                                                       |
| 1.9       | December 2015    | Updates to reflect Release 5.2  
Update to format and readability |
<p>| 2.0       | May 2016         | Updates to reflect Release 6.0                                                             |</p>
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<tr>
<td>2.5</td>
<td>March 2019</td>
<td>Updated screenshots to reflect new fields in client summary and EO profile</td>
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<td>2.6</td>
<td>April 2019</td>
<td>Updated screen shots to reflect new fields in Enhanced Learner Plan</td>
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8.1 Introduction

Note: this chapter deals exclusively with Literacy and Basic Skills (LBS) service plans. For Employment Service (ES) and Targeted Initiative for Older Worker (TIOW) service plans, refer to Chapter 8A; 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 (YJL), refer to Chapter 8E; and for SkillsAdvance Ontario (SAO), refer to Chapter 8F.

Employment Ontario service providers create plans for individuals 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 caseworker will have the ability to track all client participation. In this way, the service provider can measure the efficiency of both the client and the overall service plan.

8.2 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.

The ministry has created LBS service plan templates that support the Ontario Adult Literacy Curriculum Framework. The templates have been configured with the five LBS Goal Paths. A learner can have multiple service plans open as they may be working with more than one LBS provider.

The goal is the primary objective or desired outcome of the service plan that the client is working towards. In LBS, the goal is the learner’s goal path. The goal can be broken down into more manageable steps to assist the learner in achieving the goal. These steps are known as sub-goals, which typically consist of one or more scheduled activities or plan items. For LBS, the sub-goals are the LBS competencies, learning activities, training supports and referrals out to community resources or other programs and services.

Plan items are the fundamental building blocks of a service plan. They are the activities that are added to a sub-goal in order to achieve the goal. The successful completion of some or all plan items is required to successfully attain a sub-goal.
8.3 Service Plan Template

The ministry has created service plan templates based on the relevant program or service 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.

8.3.1 Client Summary

A client summary is a mandatory element for each service plan, and it captures client details relevant to the program or service.

8.3.2 Learner Plan

Describes the learning and program elements that prepare learners for their next steps beyond the LBS program. It includes the learner’s goal, background information, assessment results, tasks, learning activities, program duration, additional supports required by the learner as well as referral results. It organizes information in a common format for ease of use between program providers.

For a service plan to be activated, the learner plan template must be accepted by the learner.
8.4 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.

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<tr>
<th>Roles</th>
<th>View Employer Profile</th>
<th>Create/Modify Employer</th>
<th>Create EO Case</th>
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<td>Yes</td>
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<tr>
<td>Ministry Manager</td>
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<td>No</td>
<td>No</td>
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<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>

8.5 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 sub-goals
4. Add plan items to sub-goals
5. Submit service plan for approval
6. Create plan summary
7. Record acceptance of plan summary
8.6 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

 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. For **Program**, select “Literacy and Basic Skills” (the other templates are explained in Chapter 8A). For the **Service Delivery Site**, click on the magnifying glass icon and select the appropriate **Service Delivery Site Name**. The **Service Delivery Site** will populate on to the Create Service Plan page. Any user from the organization can be assigned as the **Owner**. For LBS, data entry staff will typically be the system case owners, to be differentiated from the individuals that are responsible for managing the client outside of the system.

Note that the **Program** that is selected determines the relevant choices available for the **Template**. In this case, select the goal path that is required. Click **SAVE**.

If the **LBS eChannel Indicator** checkbox is selected, the system will automatically add “e-Channel” to the program name. The service plan will display as “Literacy and Basic Skills – E-Channel” throughout the system.
Choose the template based on the plan items that have been agreed upon with the client. Refer to the Appendix for a list of plan items with their associated templates.

⚠️ Step 3: Service Plan Home Page

Ensure that all information in the service plan is correct.

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 the Appendix.

If Referred In requires modifying, click EDIT SERVICE PLAN from the Action Button on the Service Plan Home page.
8.6.1 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.

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

과정 Step 2: Client Summary Page
Click NEW.

과정 Step 3: Create Client Summary Page
Complete fields as necessary. If a Learner Gains Score is entered for Reading, Document Use, or Numeracy, then Date of Assessment (for Learner Gains Score) is required to be entered. If Learner Gains in not being used, select the ‘Learner Gains exempted’ box.

Click SAVE.
8.6.2 Add a Sub-Goal

噔 Step 1: Service Plan Home Page
Click the PLAN CONTENT tab.

噔 Step 2: Plan Content Page
Click NEW SUB-GOAL.

噔 Step 3: Select Sub-Goal Type Page
Click SELECT for the appropriate Sub-Goal Type.
### Step 4: Add Sub-Goal Page

#### Click SAVE.

**Add Sub-Goal**

<table>
<thead>
<tr>
<th>Action</th>
<th>Sub-Goal Type</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
<td>Competencies</td>
<td>Find and Use Information</td>
</tr>
<tr>
<td>Select</td>
<td>Competencies</td>
<td>Communicate Ideas and Information</td>
</tr>
<tr>
<td>Select</td>
<td>Competencies</td>
<td>Understand and Use Numbers</td>
</tr>
<tr>
<td>Select</td>
<td>Competencies</td>
<td>Use Digital Technology</td>
</tr>
<tr>
<td>Select</td>
<td>Competencies</td>
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<td>Select</td>
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<td>Engage with Others</td>
</tr>
<tr>
<td>Select</td>
<td>Competencies</td>
<td>Learning Activities</td>
</tr>
<tr>
<td>Select</td>
<td>Referral to Other Programs and Services</td>
<td>Referral Out to Other Community Resources</td>
</tr>
<tr>
<td>Select</td>
<td>Referral to Other Programs and Services</td>
<td>Referral to Other Programs and Services</td>
</tr>
<tr>
<td>Select</td>
<td>Training Supports</td>
<td>Training Supports</td>
</tr>
</tbody>
</table>
8.6.3 Add Plan Item

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

8.6.3.1 Add Plan Item for Competency Sub-Goals

This section deals with all plan items for competency-based sub-goals. For plan items related to the supporting Learning Activities sub-goal, see Section 8.6.3.2.

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

❖ 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 box beside the appropriate Plan Item and click Continue.
Step 4: Add Plan Item Page

Complete fields as necessary. For Expected Outcome, use the drop-down menu to select the appropriate value. For Expected Start Date and Expected End Date, if these dates have been defined, enter them; if not, use the default dates. Select a Delivery Method, and, if the Milestone is known at this point, use the drop-down menu to select the appropriate description.

Click SAVE.

For plan items that have three LBS levels as potential values for the Expected Outcome, a separate plan item should be created for each desired level. For example, if a learner’s plan is to include levels 2 and 3, there would be a plan item with an Expected Outcome of “Level 2” and another with “Level 3.”
When completing the plan item details for select sub-goals (only competencies), first select the Expected Outcome before choosing a Milestone description. The Milestones available to a user will be filtered based on the value selected Expected Outcome.

Do not edit the fields within the Responsibility and Plan Item Owner information panels. These fields default to the appropriate values.

**8.6.3.2 Add Plan Item for Learning Activity Sub-Goal**

The Learning Activities sub-goal has plan items for a variety of different learning activities, as well as a Custom Basic Plan Item, which is discussed in Section 8.6.3.4.

Follow steps 1 to 3 in Section 8.6.3.1.
Step 4: Add Plan Item Page

Complete fields as necessary. For Expected Outcome for all Learning Activity Plan Items other than Custom Basic Plan Item, there is only one available option "Related learning achieved". For Expected Start Date and Expected End Date, if these dates have been defined, enter them; if not, use the default dates. Because the plan item is for learning, a Delivery Method and Milestone are not required.

Click SAVE.
8.6.3.3 Add Plan Item for Training Supports Sub-Goal

The Training Supports sub-goal has two plan items for Child Care Assistance and Transportation, as well as a Custom Basic Plan Item, which is discussed in Section 8.6.3.4.

Follow steps 1 to 3 in Section 8.6.3.1.

Step 4: Add Plan Item Page

Complete fields as necessary. For **Expected Outcome** for all Training Support Plan Items other than Custom Basic Plan Item there is only one available option (“Support Paid”); therefore, this field 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. Because the plan item is for a support, a **Delivery Method** and **Milestone** are not required.

<table>
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<th>Details</th>
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<tr>
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<td>Training Supports</td>
<td>Name</td>
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<td>Primary Client</td>
<td>mister orange</td>
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</tr>
<tr>
<td>Expected Start Date</td>
<td>26/11/2018</td>
<td>Expected End Date</td>
</tr>
<tr>
<td>Expected Outcome</td>
<td>Support Paid</td>
<td>Estimated Cost</td>
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<thead>
<tr>
<th>Additional Information</th>
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<td>Milestone</td>
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<th>Comments</th>
<th></th>
<th></th>
</tr>
</thead>
</table>

[Image of Add Plan Item Page]
8.6.3.4 Add Plan Item (Custom Plan Item)

Follow steps 1 to 3 in Section 8.6.3.1.

lığın: Add Plan Item Page

Complete fields as necessary. Unlike other plan item types, the Name is a free text field. Use the drop-down menu to select the Expected Outcome. For Expected Start Date and Expected End Date, if these dates have been defined, enter them; if not, use the default dates.

Click SAVE.
8.6.4 Submit for Approval

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

 Step 2: Submit Service Plan Page
When prompted to confirm the submission, click YES.
Step 3: Service Plan Home Page

The **Status** of the service plan will appear as “Approved.”

8.6.5 Create Plan Summary

As mentioned above, the learner plan, which is captured in the Plan Summary feature within the system, describes the learning and program elements that prepare learners for their next steps beyond the LBS program. It includes the learner’s goal, background information, assessment results, tasks, learning activities, program duration, additional supports required by the learner as well as referral results.

The learner plan can be used as either a summary document that the learner must accept to proceed with service, or as an enhanced interactive form to manage learner information. For information on the Enhanced Learner Plan, which is an optional tool for LBS service delivery organizations, refer to Section 8.7. The steps below assume that the Enhanced Learner Plan is not being used.

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. Click SELECT.

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.”

![Plan Summary](image)

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](image)

### 8.6.6 Record Plan Summary Acceptance

**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 contract acceptance, enter the **Date Accepted** in the **Acceptance** information panel.

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

To record contract 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.”

8.6.6.1 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.
Plan Content

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</table>

Details

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Plan Items

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<th>Outcome</th>
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Comments

➡️ Step 3: Plan Content Page

Click EDIT from the Action Button next to the relevant plan item.

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<th>End Date</th>
<th>Status</th>
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<tbody>
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Details

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Plan Items

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<td>Not Started</td>
</tr>
</tbody>
</table>

Comments
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** and a numeric value in **Milestone**. If the **Outcome** is “Not Attained,” the **Good Cause** field can be used to record a “good” reason this was the case, such as “Certified Illness” or “Incarceration.”

Click **SAVE**.
Step 5: Plan Content Page

The **Status** has now changed to “Completed” and the **Outcome** has now changed to “Attained.”

In some cases, a red exclamation mark symbol may appear next to a completed plan item. When the mouse hovers over this symbol, it will state “Maximum period exceeded.” This warning means that the time it took to complete the plan item is higher than what the system considers to be the average completion time. If the **Actual Start Date** and **Actual End Date** values are correct, ignore this warning.
8.6.6.2 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.

♫ 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 from the **Action Button** next to the relevant plan item. When prompted to confirm the delete, click YES.

<table>
<thead>
<tr>
<th>Name of Sub-Goal</th>
<th>Start Date</th>
<th>End Date</th>
<th>Status</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>Find and Use Information</td>
<td>26/11/2018</td>
<td>26/11/2018</td>
<td>Completed</td>
<td>***</td>
</tr>
<tr>
<td>Learning Activities</td>
<td>26/11/2018</td>
<td>26/11/2018</td>
<td>Not Started</td>
<td>***</td>
</tr>
<tr>
<td>Training Supports</td>
<td>26/11/2018</td>
<td>26/11/2018</td>
<td>Not Started</td>
<td>***</td>
</tr>
</tbody>
</table>

#### Details

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training Supports</td>
<td>Training Supports</td>
<td>Outcome</td>
</tr>
</tbody>
</table>

#### Plan Items

<table>
<thead>
<tr>
<th>Name</th>
<th>MileStone #</th>
<th>Start Date</th>
<th>End Date</th>
<th>Status</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transportation</td>
<td></td>
<td></td>
<td></td>
<td>Not Started</td>
<td>***</td>
</tr>
</tbody>
</table>

#### Comments

Delete Plan Item: Transportation - Training Supports

Are you sure you want to delete this plan item?

Select either Yes or No.
Step 4: Plan Content Page

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

8.6.6.3 Cancel Plan Item

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 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.”
8.6.7 Cancel Sub-Goal

✔ Step 1: Plan Content Page
From the **Action Button** next to the relevant sub-goal, select EDIT SUB-GOAL.

<table>
<thead>
<tr>
<th>Name of Sub-Goal</th>
<th>Start Date</th>
<th>End Date</th>
<th>Status</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>Find and Use Information</td>
<td>26/11/2018</td>
<td>26/11/2018</td>
<td>Completed</td>
<td></td>
</tr>
<tr>
<td>Learning Activities</td>
<td>26/11/2018</td>
<td>26/11/2018</td>
<td>Not Started</td>
<td></td>
</tr>
</tbody>
</table>

✔ Step 2: Modify Sub-Goal Page
Select “Cancelled “from the **Outcome** drop-down menu, and click **SAVE**.

✔ Step 3: Plan Content Page
The **Outcome** has changed.
8.6.8 Delete 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.

![Plan Content Table]

<table>
<thead>
<tr>
<th>Name of Sub-Goal</th>
<th>Start Date</th>
<th>End Date</th>
<th>Status</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>Find and Use Information</td>
<td>26/11/2018</td>
<td>26/11/2018</td>
<td>Completed</td>
<td>***</td>
</tr>
<tr>
<td>Learning Activities</td>
<td>26/11/2018</td>
<td>26/11/2018</td>
<td>Not Started</td>
<td>***</td>
</tr>
</tbody>
</table>

✦ Step 2: Delete Sub-Goal Page

When asked to confirm the delete, click YES.

![Delete Sub-Goal Confirmation]

Are you sure you want to delete this sub-goal?

- Yes
- No

✦ Step 3: Plan Content Page

The deleted sub-goal will no longer appear.

![Plan Content Table]

<table>
<thead>
<tr>
<th>Name of Sub-Goal</th>
<th>Start Date</th>
<th>End Date</th>
<th>Status</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>Find and Use Information</td>
<td>26/11/2018</td>
<td>26/11/2018</td>
<td>Completed</td>
<td>***</td>
</tr>
<tr>
<td>Learning Activities</td>
<td>26/11/2018</td>
<td>26/11/2018</td>
<td>Not Started</td>
<td>***</td>
</tr>
</tbody>
</table>
8.6.8.1 Complete Sub-Goals

Prerequisite:

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

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

❖ Step 3: Plan Content Page
The Outcome has changed.
8.6.9 Close Service Plan

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

If the **Owner** is no longer an active user, you will be forced to change the service plan **Owner** to an active user.

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”.

**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.

**Step 3: Close Service Plan Page**

Click YES to close the service plan.
8.6.10 Reviews

Prerequisite:
The service plan must be closed.

➡️ Step 1: Service Plan Home Page
When a service plan is closed the system will automatically generate the 3 month follow-up review for LBS. Once this review is completed, the system will then auto-generate reviews in a cascading fashion. For service plans, this means a 6-month review will not be generated until the 3-month review is completed. Service plans with ‘Referral to Other Programs and Services’ as a sub-goal will not auto-generate these reviews. Click the **Events** tab.

➡️ Step 2: List View Page
The review related to the service plan will appear in the Events List.
8.6.10 Modify or Complete Review

✦ 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: View Review Page

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.
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.

8.7 Enhanced Learner Plan

In order to simplify administration for LBS service delivery organizations, an Enhanced Learned Plan (ELP) has been developed by the ministry based on the existing LBS Learner Plan. The ELP is an interactive PDF document with data drawn from a learner’s EOIS-CaMS service plan. This document is editable and can be uploaded to EOIS-CaMS, where its information will be updated in the learner’s service plan. Likewise, if information is updated in EOIS-CaMS, an updated ELP can be generated by the system. Note that the use of this tool is optional; LBS service delivery organizations may continue to use the existing LBS Learner Plan and EOIS-CaMS.

The Enhanced Learner Plan will be referred to as “the learner plan” hereafter in this guide.

8.7.1 Approve Service Plan

The service plan must have a Status of “Approved” before a learner plan can be downloaded.

Approval of a service plan is a system step and does not involve approval by a manager or any other individual.

Systems Steps

Step 1: Service Plan Home Page

Review the service plan, and select SUBMIT FOR APPROVAL from the Action Button. When prompted to confirm the submission, click YES.
Step 2: Submit Service Plan Page
When prompted to confirm the submission, click YES.

Submit Service Plan

Are you sure you want to submit this service plan?

Yes  No

Step 3: Service Plan Home Page
The Status of the service plan will appear as “Approved.”
8.7.2 Create Plan Summary and Download Learner Plan

Once the service plan has a **Status** of “Approved,” the learner plan can be generated.

**Systems Steps**

 Step 1: Service Plan Home Page

Click the **Plan Summary** tab.

 Step 2: Plan Summary

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

To access the learner plan, from the **Action Button** select **DOWNLOAD PLAN IN ENGLISH** or **DOWNLOAD PLAN IN FRENCH**.
Step 5: File Download Page

Save the learner plan in a secure local directory.

It is recommended that the learner’s last name and the date the learner plan was generated also be added to the file name to assist with document management (e.g., “Smith_1234567_08-30-2012”).

Once the file has been saved, open it from the relevant directory.
If the learner plan is opened without saving and then saved using **Save** instead of **Save As PDF**, it may be difficult to retrieve since it will have been saved to a temporary folder.

### 8.7.3 Using the Learner Plan

Since the learner plan uses Adobe Lifecycle technology, it must be opened with the free Adobe Acrobat Reader 9.0 or higher. Some of its functionality cannot be used with Adobe Acrobat Professional or other PDF readers. Adobe Acrobat X and Adobe Reader can both be installed on the same desktop, but it is important that Adobe Reader is set as the default program for opening PDF documents.

Also, note that the learner plan should be printed on letter-sized paper in portrait format.

#### 8.7.3.1 Components of the Learner Plan

The learner plan is broken up into several sections as shown below:

1. **Header Information** – this contains the date and time the learner plan was generated, and the status of the service plan.
2. **Bookmarks Toolbar** – clicking on the bookmarks will open any specific section of the learner plan. When the learner plan is first opened, this toolbar is open by default.
3. **Main Content Area** – the main content area is where information can be added and modified within the sections of the learner plan.
4. **Validate Button** – prior to saving, the validate button is used to determine if all required fields have been completed.

![Learner Plan Components](image-url)
8.7.3.2 Adobe Acrobat Reader functionality and the Learner Plan

Adobe Acrobat Reader automatically highlights mandatory fields. The Highlight Existing Fields button in the upper-right can be used to toggle this feature on and off.

 Depending on the document management process being used, users may wish to save a file using a new filename. Similar to other desktop applications, to save the learner plan using a new filename, the File, Save As PDF function must be used.
8.7.3.2 Validating the Learner Plan

The Validate button on the learner plan uses a variety of rules to determine if any additional information is required.

If information is showing as incomplete upon validation, the file can still be saved, but the missing information must be completed prior to the learner plan being uploaded into EOIS-CaMS. Document management practices will need to ensure that learner plans are managed successfully until all required fields are known and upload into EOIS-CaMS is possible.

It is important to understand the importance of sections within the learner plan and how they relate to mandatory fields. For example, the learner plan can be validated and uploaded if no information in the Client Summary section has been entered, but if this information is partially complete and mandatory fields are missing, all mandatory fields in that section must be completed prior to the learner plan being validated and uploaded.
8.7.4 Completing the Learner Plan

The learner plan has a number of rules that are enforced to ensure that information is collected in a manner that supports the OALCF as well as integration with EOIS-CaMS. The sections of the learner plan start with Contact Information and collect a variety of information all the way through to Close Service Plan.

The following is a section-by-section description of the learner plan.

8.7.4.1 Instructions

The Instructions section explains how to save the document, view mandatory fields, and validate the learner plan. Because these instructions will not be referred to often, this is the last section in the document.
8.7.4.2 Contact Information

The Contact Information section extracts basic information from the learner's client profile and service plan. If this information needs updating, it can be edited in this section and will be updated in EOIS-CaMS when the learner plan is uploaded.

If the Primary Mailing Address or Alternate Mailing Address requires updating, this must be done manually in EOIS-CaMS due to the requirement for postal code validation.
The following fields will be populated automatically if the corresponding records exist in EOIS-CaMS: Has the learner previously accessed the LBS Program? (the LBS service delivery site name will appear), Is the learner an ES client? (the ES service delivery site name will appear), and Is the learner participating in any ministry delivered programs? (the name of the ministry program will appear).

<table>
<thead>
<tr>
<th>Background</th>
</tr>
</thead>
<tbody>
<tr>
<td>Referred In</td>
</tr>
<tr>
<td>Ontario Works</td>
</tr>
<tr>
<td>Is the learner participating in another L.B.S. program?</td>
</tr>
</tbody>
</table>

Has the learner previously accessed the L.B.S. program?  
Is the learner an Employment Service client?  
Is the learner participating in any ministry delivered programs?
8.7.4.2 Client Summary

The information in the Client Summary section is identical to the Client Summary page in EOIS-CaMS. If this information needs to be completed or updated, it can be added or edited in this section and will be updated in EOIS-CaMS when the learner plan is uploaded.

### B. CLIENT SUMMARY

<table>
<thead>
<tr>
<th>Learner</th>
<th>Betty Gold</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learner Number</td>
<td>Goal Path</td>
</tr>
<tr>
<td>6199297</td>
<td>Apprenticeship</td>
</tr>
<tr>
<td><strong>Language</strong></td>
<td></td>
</tr>
<tr>
<td>Language Spoken at Home</td>
<td>Service Provision Language</td>
</tr>
<tr>
<td>English</td>
<td>English</td>
</tr>
<tr>
<td>Language Spoken at Last Workplace</td>
<td></td>
</tr>
<tr>
<td>English</td>
<td></td>
</tr>
<tr>
<td><strong>Source of Income</strong></td>
<td></td>
</tr>
<tr>
<td>Source of Income</td>
<td></td>
</tr>
<tr>
<td>Employment Insurance</td>
<td></td>
</tr>
<tr>
<td>Number Of Dependant Children</td>
<td>6</td>
</tr>
<tr>
<td><strong>Education</strong></td>
<td></td>
</tr>
<tr>
<td>Highest Level of Education Completed</td>
<td></td>
</tr>
<tr>
<td>Grade 10</td>
<td></td>
</tr>
<tr>
<td>Time Out of Formal Education</td>
<td></td>
</tr>
<tr>
<td>Less than 3 Months</td>
<td></td>
</tr>
<tr>
<td>Time Out of Training</td>
<td></td>
</tr>
<tr>
<td>3 to 6 Months</td>
<td></td>
</tr>
<tr>
<td>History of Interrupted Education</td>
<td></td>
</tr>
<tr>
<td>No</td>
<td></td>
</tr>
<tr>
<td><strong>Employment</strong></td>
<td></td>
</tr>
<tr>
<td>Labour Force Attachment</td>
<td></td>
</tr>
<tr>
<td>Self Employed</td>
<td></td>
</tr>
<tr>
<td>Precarious Employment</td>
<td>Unknown</td>
</tr>
<tr>
<td>Employment Experience</td>
<td>No Work Experience</td>
</tr>
<tr>
<td>Registered Apprentice</td>
<td></td>
</tr>
<tr>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Time Out of Work</td>
<td></td>
</tr>
<tr>
<td>Less than 3 Months</td>
<td></td>
</tr>
</tbody>
</table>
8.7.4.3 Goal Path and OALCF Competencies

The information in the Goal Path and OALCF Competencies section corresponds to the OALCF-related sub-goals and plan items in EOIS-CaMS and includes some additional optional fields that can be used to provide more detail. The Competency field maps to the corresponding sub-goal in EOIS-CaMS, and the Task Group corresponds to the plan item.

All the OALCF sub-goals appear in the learner plan, but they only become active when plan items are created beneath them.

Items in this section can only be cancelled using the learner plan; however, they can be deleted in EOIS-CaMS.
8.7.4.4 Learning Activities

The information in the Learning Activities section corresponds to the information within the Learning Activities sub-goal and its associated plan items in EOIS-CaMS.

Items in this section can only be cancelled using the learner plan; however, they can be deleted in EOIS-CaMS.

### D. LEARNING ACTIVITIES

<table>
<thead>
<tr>
<th>Learner</th>
<th>Jill Client</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learner Number</td>
<td>2614531</td>
</tr>
<tr>
<td>Goal Path</td>
<td>Independence</td>
</tr>
</tbody>
</table>

In the table below indicate which Learning Activities the learner will do to be transition ready.

**Instructions:** To add a new plan item, click the plus sign button. To remove a plan item, click the X button. If there is no x button, the plan item can be removed in Employment Ontario Information System-Case Management System.
8.7.4.5 LBS Program Referrals

The information in the LBS Program Referrals section corresponds to the information within the Referral Out to Other Community Resources and Referral to Other Programs and Services sub-goal types and their associated plan items in EOIS-CaMS.

Items in this section can only be cancelled using the learner plan; however, they can be deleted in EOIS-CaMS.

### E. LBS PROGRAM REFERRALS

<table>
<thead>
<tr>
<th>Learner</th>
<th>Jill Client</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learner Number</td>
<td>2614531</td>
</tr>
<tr>
<td>Goal Path</td>
<td>Independence</td>
</tr>
</tbody>
</table>

**Instructions:** In the table below indicate which referrals the learner needs to be transition ready, and has been referred to.
To add a new plan item, click the plus sign button. To remove a plan item, click the X button. If there is no x button, the plan item can be removed in Employment Ontario Information System-Case Management System.

<table>
<thead>
<tr>
<th>Referral Out to Other Community Resources</th>
<th>Status</th>
<th>Sub-Goal Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Plan Item</td>
<td>Financial Planning</td>
</tr>
<tr>
<td></td>
<td>When was the referral made?</td>
<td>Referred During Service</td>
</tr>
<tr>
<td></td>
<td>Which Agency was the referral made to?</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Expected Start Date</th>
<th>Expected End Date</th>
<th>Actual Start Date</th>
<th>Actual End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>15/08/2013</td>
<td>15/08/2013</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Status: Outcome

Comments: |
8.7.4.6 Training Support Funding

The information in the Training Support Funding section corresponds to the information within the Training Supports sub-goal and its associated plan items in EOIS-CaMS.

Items in this section can only be cancelled using the learner plan; however, they can be deleted in EOIS-CaMS.

<table>
<thead>
<tr>
<th>F. TRAINING SUPPORT FUNDING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learner</td>
</tr>
<tr>
<td>Jill Client</td>
</tr>
<tr>
<td>Learner Number</td>
</tr>
<tr>
<td>2614531</td>
</tr>
</tbody>
</table>

**Instructions:** In the table below indicate which training supports the learner needs to be transition ready. To add a new plan item, click the plus sign button. To remove a plan item, click the X button. If there is no x button, the plan item can be removed in Employment Ontario Information System-Case Management System.

<table>
<thead>
<tr>
<th>Training Supports</th>
<th>Status</th>
<th>Sub-Goal Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Plan Item</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Transportation</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Expected Outcome</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Support Paid</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Estimated Cost</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Actual Cost</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Expected Start Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>15/08/2013</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Expected End Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>15/08/2013</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Outcome</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comments</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
8.7.4.7 Other Supports the Learner is Accessing

The Other Supports the Learner is Accessing section captures any other supports that cannot be captured in the previous section. It is not linked to any fields within EOIS-CaMS.

<table>
<thead>
<tr>
<th>G. OTHER SUPPORTS THE LEARNER IS ACCESSING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learner</td>
</tr>
<tr>
<td>Jill Client</td>
</tr>
<tr>
<td>Goal Path</td>
</tr>
<tr>
<td>Independence</td>
</tr>
<tr>
<td>Other Supports: To add a new line item, click the plus sign button. To remove a line item, click the X button.</td>
</tr>
<tr>
<td>Other Support</td>
</tr>
<tr>
<td>Description</td>
</tr>
<tr>
<td>Which agency is providing the support?</td>
</tr>
<tr>
<td>Notes: To add a note, click the plus sign button. To remove a note, click the X button.</td>
</tr>
</tbody>
</table>

When printed, this section is also where signatures are captured for the learner and LBS service delivery organization to confirm agreement. The Date field next to the learner’s signature is linked with the Date Accepted field in EOIS-CaMS. Once the learner plan is uploaded, this date will sync with the service plan, changing the plan summary status to “Accepted,” which in turn changes the service plan Status to “Active.” This date can also be manually entered into EOIS-CaMS, if desired, to produce the same changes in status.

<table>
<thead>
<tr>
<th>I agree to the content of this Learner Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learner</td>
</tr>
<tr>
<td>Date Accepted</td>
</tr>
<tr>
<td>LBS Provider</td>
</tr>
<tr>
<td>Date</td>
</tr>
</tbody>
</table>
8.7.4.8 Close Service Plan

The service plan can be closed by entering closure details into the learner plan and uploading it. Once the service plan has closed, a new learner plan cannot be downloaded.

Since the closure validations are the same for the learner plan as they are in EOIS-CaMS, before closure details can be entered a **Date Accepted** must be entered, all sub-goals must be assigned outcomes, and a client summary must have been completed.

The process for uploading the learner plan to close the service plan is detailed in Section 8.7.7. For information on service plan closure in EOIS-CaMS, refer to Section 8.6.9.

### H. CLOSE SERVICE PLAN

<table>
<thead>
<tr>
<th>Learner</th>
<th>Jessica</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Learner Number</th>
<th>Goal Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>42883</td>
<td>Employment</td>
</tr>
</tbody>
</table>

#### Service Plan Closure Details

<table>
<thead>
<tr>
<th>Closure Reason</th>
<th>Customer Satisfaction</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Outcome</th>
</tr>
</thead>
</table>

#### Assessment

- **Learner Gains at Exit: Reading**
  - Relevant reading activities included in the Learner Plan

- **Learner Gains at Exit: Document Use**
  - Relevant document use learning activities included in the Learner Plan

- **Learner Gains at Exit: Numeracy**
  - Relevant numeracy learning activities included in the Learner Plan

<table>
<thead>
<tr>
<th>Date of Exit Learner Gains Score</th>
<th>Has the goal path specific Culminating Task been successfully completed?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Self Reported Learner Weekly Time Commitment?</th>
<th>Has the learner successfully completed all goal path requirements identified in the learner plan?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Your employment situation has improved.</th>
<th>Hours per Week</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>You are better prepared to find and maintain employment.</th>
<th>Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>You have developed and/or increased skills.</th>
<th>Wage Per</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

What other important outcomes or accomplishments has the learner achieved as a result of the program?
8.7.5 Uploading the Learner Plan

Uploading the learner plan into the learner’s service plan is a very straightforward process from a system perspective, but there are a number of document management considerations to keep in mind:

- the PDF file must be validated and saved prior to upload
- more than one staff person can work on a learner plan before it is uploaded, but it is best not to create multiple versions of the file and to have clarity around when updates are made and when upload will occur
- whenever a learner plan is uploaded into the system, a new version of the PDF must be downloaded and only that version can be edited moving forward (explained further below)
- older versions of the learner plan can be stored in an archive folder to avoid confusion.

System Steps

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

🔗 Step 2: Plan Summary Page
Click SELECT.

🔗 Step 3: Plan Summary Home Page
From the Action Button, select UPLOAD PLAN.
Step 4: Upload Learner Plan Page

Select the PDF File to upload and a Reason for upload, and click UPLOAD.

Upload Learner Plan Literacy and Basic Skills 5975047 - mister orange 7168770

Confirm the upload by clicking OK.
Step 5: Download Learner Plan Page

At this point a new version of the learner plan should be downloaded by clicking YES. The reason for this is that if the original PDF document is further edited and uploaded a second time, content such as plan items will be added to the service plan in EOIS-CaMS again, creating duplication (if the same PDF is being uploaded for a second time, a system warning will appear).

Because of this, document management is very important for managing the download and upload of learner plans. Once a new version of the learner plan has been downloaded, it should either be given a unique file name and the previous version should be placed in a different folder to avoid confusion, or it should be saved over the previous version of the file.

Learner Plan Literacy and Basic Skills 5975047 - mister orange 7168770

The learner plan has been uploaded successfully, and the client’s service plan has been updated. Do you wish to download a new version of the learner plan for mister orange (this is recommended)? Select Yes to proceed or No to cancel.
There is a quick way to tell if plan item content is already in EOIS-CaMS. If there is no X symbol in the upper-right corner that means that it exists in EOIS-CaMS. If the X symbol is present, that means that the plan item was added to this particular version of the learner plan. This can be a helpful indicator when dealing with version control.
8.7.6 Uploading the Learner Plan to Close the Service Plan

Uploading a learner plan that has closure details will close the service plan as part of the upload process. As such, it is very important to ensure that all required information has been captured in the learner plan prior to upload, since both it and the service plan cannot be edited after upload.

It is possible to download a learner plan when the service plan is in Approved status with no content and then complete all relevant information (client summary, plan items, sub-goals, Date Accepted, closure details, etc.) in the learner plan. On upload, all of this information will be transferred to EOIS-CaMS and the service plan will be closed.

It is also possible to upload the learner plan whenever there is new content to ensure that EOIS-CaMS always has the most up-to-date information.

System Steps

１ Step 1: Service Plan Home Page

Click the Plan Summary tab.
ฤษฎีกาที่ 2: หน้าخلاصมือสมัครภาพ

คลิก SELECT.

<table>
<thead>
<tr>
<th>Action</th>
<th>Issued To</th>
<th>Date Issued</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
<td>mister orange</td>
<td>27/11/2018</td>
<td>Issued</td>
</tr>
</tbody>
</table>

ฤษฎีกาที่ 3: หน้ารวมผลการสมัครภาพ

จากปุ่ม Action Button, คลิก UPLOAD PLAN.

<table>
<thead>
<tr>
<th>Plan Summary Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Issued To</td>
</tr>
<tr>
<td>Reason</td>
</tr>
<tr>
<td>Issue Date</td>
</tr>
</tbody>
</table>

ฤษฎีกาที่ 4: หน้าเพจการละเล่นของผู้สมัคร

เลือกไฟล์ PDF เป็น Reason สำหรับการละเล่น, และคลิก UPLOAD.
Confirm the upload by clicking **OK**.

When uploading a learner plan with closure details, a **Reviewer** must be assigned as part of the closure process. Select a **Reviewer**, and click **SAVE**.

**Step 5: Close Service Plan Page**
Close Service Plan Literacy and Basic Skills 5975047 - mister orange 7168770

Uploading a closed Learner Plan will close the Service Plan. To close this service plan select Yes and a Reviewer. Select No to cancel.

Reviewer

 Step 6: Service Plan Closed Page

A confirmation page appears. Click OK to view the closed service plan.

Service Plan Closed Literacy and Basic Skills 5975047 - mister orange 7168770

The Learner Plan has been uploaded successfully, and the client’s Service Plan has been updated and Closed. Select Ok to view Service Plan Home.
8.7.7 Statuses in the Learner Plan

The learner plan uses the same statuses as EOIS-CaMS, but these statuses are only updated after the learner plan has been uploaded and a new version has been downloaded. For example, if a Date Accepted is entered into the learner plan, the Status will only change to “Active” after upload and download.

The upload process can also change a status multiple times. For example, if a learner plan is in “Approved” status, entering a Date Accepted and closure details (as well as all other information required for closure) will mean that on upload, the Status of the service plan will change to “Active” before being changed to “Closed.”

8.7.8 View Download and Upload History

The download and upload histories can be viewed by clicking on the Download History or Upload History tabs on the Plan Summary Home page.

The Download History page lists the date of download and the user who requested it.
The Upload History page lists the reason for the update, the upload date, and the user who uploaded the file. Clicking VIEW brings up a non-editable version of the previously uploaded file, which can be printed if needed.
8.8 Appendix

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 Statuses

8.8.4.1 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.
8.8.4.2 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.”

8.8.4.3 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.

8.8.5 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.
8.8.6 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.

8.8.7 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.