Chapter 8F: Service Plan Management for SkillsAdvance Ontario
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# Document History

<table>
<thead>
<tr>
<th>Version #</th>
<th>Date</th>
<th>Description</th>
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<tr>
<td>1.0</td>
<td>November 2016</td>
<td>Initial version released with the launch of EOIS-CaMS Release 6.3.</td>
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<tr>
<td>1.1</td>
<td>June 2017</td>
<td>• Updates to reflect Release 17.2&lt;br&gt;• Removed reference to Targeted Initiative for Older Workers</td>
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<td>Updates to reflect Release 17.3&lt;br&gt;• Service Delivery Site selection template&lt;br&gt;• Adding sub-goal streamlined&lt;br&gt;• Ability to add multiple plan items</td>
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<td>December 2017</td>
<td>Updates to reflect Release 17.4&lt;br&gt;• Remove Plan Item Owner and Responsibility sections from plan items&lt;br&gt;• Add Total Supports on Service Plan Home page</td>
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<td>1.4</td>
<td>September 2018</td>
<td>Update to add Retention Services</td>
</tr>
<tr>
<td>1.5</td>
<td>September 2018</td>
<td>Update screenshots re Curam v7 Upgrade</td>
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<tr>
<td>1.6</td>
<td>February 2019</td>
<td>Update screenshots re: new client summary fields</td>
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8.1 Introduction

Note: This chapter deals exclusively with the SkillsAdvance Ontario (SAO) service plan. For Employment Service (ES) service plans, refer to Chapter 8A. For the Literacy and Basic Skills (LBS) service plan, 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) service plans, refer to Chapter 8D, and Youth Job Link (YJL) service plans, refer to Chapter 8E.

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 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.

8.2.1 Goal

The goal is the primary objective or desired outcome of the service plan, which the client is working towards. The SAO service plan goal is “Sustainable Employment”.

8.2.2 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 SAO service plan sub-goals are:

- Client Service Planning and Coordination
- Pre-Employment Services
- Essential and Technical Skills
- Job Matching and Placement

8.2.3 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.

8.3 Service Plan Template

The Ministry has created service plan templates based on SAO 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.

8.3.1 Client Summary

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

8.3.2 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.
8.4 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.

<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>
8.5 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 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

8.6 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.

A client can only have one “Open”, “Approved”, or “Active” SAO Service Plan at a time.

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. Select “SkillsAdvance Ontario” as the Program, which will pre-populate the appropriate Template. 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 the Create Service Plan page. Only Service Delivery Sites offering the selected program will appear in the list. Click SAVE.

Step 3: Service Plan Home Page

Ensure that all information in the service plan is correct.

The system auto-creates the four mandatory SAO sub-goals that are used to administer the program.
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.

A client summary must be created before submitting the service plan for approval.
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 SAO. If “Other” is selected for **Essential Skills Assessment Tool Used** or **Source of Income**, then the corresponding **Other Description** field is enabled and a description is required to be entered. Complete all fields, and click SAVE.
8.6.2 Add Additional Sub-Goal(s)

Adding a sub-goal is not a mandatory step for creating a service plan.

Fields on the Sub-Goals page will vary depending on the Program chosen.
System Steps

✦ 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** for the appropriate **Sub-Goal Type** and **Sub-Goal**.
Step 4: Add Sub Goal Page
Click SAVE.

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

All four sub-goals must contain at least one plan item.

8.6.3.1 Add Plan Item

System Steps

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

馗 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 beside the appropriate **Plan Item**.

<table>
<thead>
<tr>
<th>Name</th>
<th>Plan Item Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arrange Housing</td>
<td>Basic Plan Item</td>
<td></td>
</tr>
<tr>
<td>Attend Job Interview</td>
<td>Basic Plan Item</td>
<td></td>
</tr>
<tr>
<td>Attend Workshop</td>
<td>Basic Plan Item</td>
<td></td>
</tr>
<tr>
<td>Career Assessment</td>
<td>Basic Plan Item</td>
<td></td>
</tr>
<tr>
<td>Compile Portfolio</td>
<td>Basic Plan Item</td>
<td></td>
</tr>
<tr>
<td>Complete Resume</td>
<td>Basic Plan Item</td>
<td></td>
</tr>
<tr>
<td>Conduct Cold Calls</td>
<td>Basic Plan Item</td>
<td></td>
</tr>
<tr>
<td>Custom Basic Plan Item</td>
<td>Custom Basic Plan</td>
<td></td>
</tr>
<tr>
<td>Evaluate Foreign Credentials</td>
<td>Basic Plan Item</td>
<td></td>
</tr>
<tr>
<td>Job Application Preparation</td>
<td>Basic Plan Item</td>
<td></td>
</tr>
<tr>
<td>Network</td>
<td>Basic Plan Item</td>
<td></td>
</tr>
<tr>
<td>Obtain references</td>
<td>Basic Plan Item</td>
<td></td>
</tr>
<tr>
<td>Prepare for Interview</td>
<td>Basic Plan Item</td>
<td></td>
</tr>
<tr>
<td>Prior Learning Assessment</td>
<td>Basic Plan Item</td>
<td></td>
</tr>
</tbody>
</table>

**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, click the drop-down menu and select the appropriate value. Once completed, the **Expected Outcome** will populate on the Add Plan Item page. For **Expected Start Date** and
**Expected End Date**, if these dates have been defined, enter them; if not, use the default dates, and click **SAVE & EXIT**.

### Add Plan Item

<table>
<thead>
<tr>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sub-Goal</td>
</tr>
<tr>
<td>Primary Client</td>
</tr>
<tr>
<td><strong>Expected Start Date</strong></td>
</tr>
<tr>
<td><strong>Expected Outcome</strong></td>
</tr>
</tbody>
</table>

#### 8.6.3.2 Add Plan Item: Supports

**Prerequisite**

Follow steps 1 to 2 in Section 8.6.3.1.

**System Steps**

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

In the list of plan items associated with the **Job Matching and Placement** sub-goal, click the checkbox next to **Supports for Individuals - Clothing**.
Step 4: Add Plan Item Page

Complete fields as necessary. For **Expected Outcome**, the system defaults to 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, and click SAVE & EXIT.
Estimated Cost for all Supports for Individuals plan items cannot exceed a combined total of $1000. For example, the sub-goal can consist of one supports for individuals plan item for $1000 or four different supports for individuals plan items ($250 each totalling $1000). The same rule applies to Supports for Employers.

### 8.6.3.3 Add Plan Item: Placement

#### Prerequisite
The employer must be registered in the system and linked to a Corporate Entity. If the Employer is not registered or linked to a Corporate Entity, refer to the Employer Management chapter.

Follow steps 1 to 2 in Section 8.6.3.1.

#### System Steps

1. **Step 3: Select Plan Item Type Page**
   In the list of plan items associated with the Job Matching and Placement sub-goal, click the checkbox next to **Job Placement - General**.
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.
雇主搜索

搜索条件

- 雇主参考号
- 交易/公司名称
- 公司地址

搜索结果

- 动作
- 公司名称
- 雇主参考号
- 交易/公司名称
- 公司地址
- 最后更新日期

步骤 6：雇主搜索页面

点击 SELECT 旁边的适当雇主。

雇主搜索

搜索条件

- 雇主参考号
- 交易/公司名称
- 公司地址

搜索结果（项目总数：50，总数：87）

<table>
<thead>
<tr>
<th>动作</th>
<th>公司名称</th>
<th>雇主参考号</th>
<th>交易/公司名称</th>
<th>公司地址</th>
<th>最后更新日期</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
<td>Alpha textbooks inc</td>
<td>10240002981</td>
<td>Alpha textbooks Inc</td>
<td>NORTH YORK</td>
<td>27/05/2016 15:51</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Step 7: Add Plan Item Page

The Employer name will populate the Add Plan Item page. Complete fields as necessary. For Expected Outcome, if there is only one available option, this field will pre-populate. The Expected Start Date, Expected End Date, National Occupation Code, and NAICS must be entered at the time of creation. Click SAVE & EXIT.

8.6.4 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.

- A Social Insurance Number must be entered for the service plan to be approved.

System Steps

- 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.

Submit Service Plan

Are you sure you want to submit this service plan?

Step 3 Service Plan Home Page
The Status of the service plan will appear as “Approved.”

8.6.5 Create Plan Summary
System Steps

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.
8.6.6 Record Plan Summary Acceptance

System Steps

✦ 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.”

8.6.6.1 Modify (Complete) Plan Items

System Steps

Step 1: Service Plan Home Page

Click the Plan Content tab.
Step 2: Plan Content Page
Toggle the relevant 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>Client Service Planning and Coordination</td>
<td>19/09/2018</td>
<td>19/09/2018</td>
<td>Not Started</td>
<td></td>
</tr>
<tr>
<td>Job Matching and Placement</td>
<td>05/03/2018</td>
<td>19/09/2018</td>
<td>Not Started</td>
<td></td>
</tr>
<tr>
<td>Essential and Technical Skills</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pre-Employment Services</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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, Actual End Date, and Actual Cost. Select the appropriate Outcome from the drop-down menu. Employment Outcome is a mandatory field if the Actual Start Date is specified. Complete the Placement Information section as needed. If the Actual
Start Date is specified, then Job Title, Placement Category, and Employment Hours Per Week are mandatory fields. Complete all Customer Satisfaction questions, and 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:

Pre-Employment Services
- All plan items

Job Matching and Placements
- Job Placement – General
- Custom Basic Plan Item

Post-Employment Services
- All plan items

Estimated Cost cannot be modified once the plan item has been saved.

Both Estimated Cost and Actual Cost for all Supports for Individuals plan items cannot exceed a combined total of $1000.00. For example, the sub-goal can consist of one supports for individuals plan item for $1000 or four different supports for individuals plan items ($250 each totalling $1000). The same rule applies to Supports for Employers.

For SAO, Employment Outcome is captured at the Placement Plan Item level and at the service plan closure. Customer Satisfaction is captured only at the Placement Plan Item level.

All Customer Satisfaction questions must be completed when the plan item outcome is “Attained”.
Step 5: Plan Content Page

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

Service Plan Home
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.

### 8.6.6.2 Delete Plan Item

If a plan item has a status of “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.

**System Steps**

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

2. **Step 2: Plan Content Page**
   - Toggle the relevant 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>Client Service Planning and Coordination</td>
<td>19/09/2018</td>
<td>19/09/2018</td>
<td>Not Started</td>
<td></td>
</tr>
<tr>
<td>Job Matching and Placement</td>
<td>06/03/2018</td>
<td>07/03/2018</td>
<td>In Progress</td>
<td></td>
</tr>
<tr>
<td>Essential and Technical Skills</td>
<td></td>
<td></td>
<td>Not Started</td>
<td></td>
</tr>
<tr>
<td>Pre-Employment Services</td>
<td></td>
<td></td>
<td>Not Started</td>
<td></td>
</tr>
</tbody>
</table>
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.
8.6.6.3 Cancel Plan Item

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 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.”
8.6.7 Cancel Sub-Goal

System Steps

✦ 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.
Step 3: Plan Content Page

The **Outcome** has changed to “Cancelled”.

<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>Client Service Planning and Coordination</td>
<td></td>
<td></td>
<td>Not Started</td>
<td>***</td>
</tr>
<tr>
<td>Pre-Employment Services</td>
<td></td>
<td></td>
<td>Not Started</td>
<td>***</td>
</tr>
<tr>
<td>Essential and Technical Skills</td>
<td></td>
<td></td>
<td>Not Started</td>
<td>***</td>
</tr>
<tr>
<td>Job Matching and Placement</td>
<td></td>
<td></td>
<td>Not Started</td>
<td>***</td>
</tr>
<tr>
<td>Referral to Other Programs and Services</td>
<td></td>
<td></td>
<td>Not Started</td>
<td>***</td>
</tr>
</tbody>
</table>

8.6.7.1 Complete Sub-Goals

**Prerequisite**

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

**System Steps**

**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.

After the sub-goal is completed, the client must be asked if they require any follow-up supports. If the client requires follow-up supports, Post-Employment Services sub-goal must be added. See section 8.6.8 for instructions.

### 8.6.7.2 Complete Sub-Goals: Essential and Technical Skills

**Prerequisite**

- All associated plan items must have a status of “Completed” or “Cancelled.”
- Post Assessment questionnaire can only be completed when the **Outcome** for Essential and Technical Skills sub-goal is “Attained.”
System Steps

💡 Step 1: Plan Content Page

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

![Plan Content Table](attachment:Plan%20Content.png)

💡 Step 2: Modify Sub-Goal Page

Select the appropriate **Outcome** item from the drop-down menu. The **Post Assessment** questionnaire is unique to the Essential and Technical Skills sub-goal, and must be completed. The pre-assessment tool captured in the Client Summary will pre-populate the **Post Assessment Essential Skills Assessment Tool Used** field, and is read-only. If “Other” was selected on the Pre Assessment tool along with a description, then the **Essential Skills Assessment Results** will require text to be entered. Alternatively, if a specific tool was selected from the drop-down menu, a numeric value (0-500) is required. Click **SAVE**.
Step 3: Plan Content Page

The **Outcome** has changed.
8.6.8 Adding Retention Services

Prerequisite

- Sub-goal closed to attained and client has requested follow-up services.
- Step One: Click on Plan Content tab.

- Step Two: Click on New Sub-Goal

- Step Three: Click Select for Post-Employment Services
Create Sub-Goal

<table>
<thead>
<tr>
<th>Action</th>
<th>Sub-Goal Type</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
<td>Ministry Delivered Programs</td>
<td>Referral to Ministry Delivered Programs</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>SkillsAdvance Ontario</td>
<td>Client Service Planning and Coordination</td>
</tr>
<tr>
<td>Select</td>
<td>SkillsAdvance Ontario</td>
<td>Essential and Technical Skills</td>
</tr>
<tr>
<td>Select</td>
<td>SkillsAdvance Ontario</td>
<td>Job Matching and Placement</td>
</tr>
<tr>
<td>Select</td>
<td>SkillsAdvance Ontario</td>
<td>Post-Employment Services</td>
</tr>
<tr>
<td>Select</td>
<td>SkillsAdvance Ontario</td>
<td>Pre-Employment Services</td>
</tr>
</tbody>
</table>

- Step Four: Select Save
- Step Five: Click on the Action Button next to Post-Employment Services and select Add Plan Item

- Step Six: Click the box next to the appropriate plan item. Click Continue.
Step Seven: Enter in the appropriate information and click Save & Exit
8.6.9 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.

If the Closure Reason is “Completion”, the following conditions will apply:

- All four sub-goals are mandatory
- Each sub-goal must have an Outcome of “Attained” and a “Completed” status
- A “Completed” Job Placement – General plan item with an Outcome of “Attained” must exist in the Job Matching and Placement sub-goal.
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**

 prominently

**Step 1: Service Plan Home Page**

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

**Step 2: Close Service Plan Page**

Complete the **Reason** and **Outcome**. The current case owner will default as the service plan **Reviewer**. Click **SAVE**.

![Image of Close Service Plan Page]

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

There are no reviews (system-generated or manually created) for SAO participants
8.7 Appendix

8.7.1 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.

8.7.2 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.

8.7.3 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”).

8.7.4 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.
8.7.5 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.”

8.7.6 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.

8.7.7 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.
8.7.8 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.

8.7.9 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.