Chapter 8D: Service Plan Management for Youth Job Connection and Youth Job Connection Summer
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## Document History

<table>
<thead>
<tr>
<th>Version #</th>
<th>Date</th>
<th>Description</th>
</tr>
</thead>
</table>
| 1.0       | December 2015 | Initial version released with the launch of EOIS-CaMS Release 5.2.  
                                  |             | Update to format and readability |
| 1.1       | May 2016   | Updated to reflect changes in EOIS-CaMS Release 6.0, including the removal of the “Youth Job Connection Afterschool (Temporary)” service plan template and the addition of the “Youth Job Connection Summer” service plan template. |
| 1.2       | November 2016 | Updates to reflect Release 6.3 |
| 1.3       | April 2017  | Updates to reflect Release 7.0 |
| 1.4       | June 2017   | • Updates to reflect Release 17.2  
                                  |             | • Removed reference to Targeted Initiative for Older Workers |
|           | September 2017 | Updates to reflect Release 17.3  
                                  |             | • Calculation of PES hours on home page  
                                  |             | • Service Delivery Site selection template  
                                  |             | • Adding sub-goal streamlined  
                                  |             | • Ability to add multiple plan items |
| 1.6       | December 2017 | Updates to reflect Release 17.4  
                                  |             | • Remove Plan Item Owner and Responsibility sections from plan items  
                                  |             | • Add Total Supports on Service Plan Home page |
| 1.7       | April 2018  | Updates to reflect Release 18.1  
                                  |             | • Plan Summary |
| 1.8       | August 2018 | Update screenshots re Curam v7 Upgrade |
| 1.9       | March 2019  | Updated to reflect new client summary fields |
8.1 Introduction

Note: This chapter deals exclusively with the Youth Job Connection (YJC) and Youth Job Connection Summer (YJCS) 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 Link Service plans, refer to Chapter 8E. For SkillsAdvance Ontario (SAO), refer to Chapter 8F.

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 YJC 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 YJC service plan sub-goals are:

- Client Service Planning and Coordination
- Pre-Employment Services
- Job Matching, Placement and Incentives

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 YJC 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.

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 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. Select “Youth Job Connection” as the Program. Click SAVE.
Note that the examples used in this chapter are for the Youth Job Connection service plan template. The Youth Job Connection Summer service plan template only differs from Youth Job Connection in a few key areas that will be noted.

When selecting “Yes” for **Self Service Initiated**, “No Response” should be selected for **Referred In**.

**Step 3: Service Plan Home Page**

Ensure that all information in the service plan is correct.

The system auto-creates the three mandatory YJC sub-goals that are used to administer the program. If required, the “Referral to Other Programs and Services” sub-goal can be added.

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.

✦ 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 YJC. Complete all fields, and click SAVE.
The fields will differ for YJCS.

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.

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 to Other Programs and Services” and the appropriate referral sub-goal.
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

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

ركز Step 2: Plan Content Page
From the Action Button next to the appropriate sub-goal, select ADD PLAN ITEM.

ركز Step 3: Select Plan Item Type Page
Click the checkbox(es) beside the appropriate Plan Item(s).
<table>
<thead>
<tr>
<th>Plan Items</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>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>Job Shadow</td>
<td>Basic Plan Item</td>
<td></td>
</tr>
<tr>
<td>Mentoring Support for Employment Readiness</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>
</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.

To add a plan item with Supports follow the same flow as section 8.6.3.1. Note that the **Estimated Cost** must be completed.

### 8.6.3.2 Add Plan Item: Pre-Employment Services (PES) Stipend Payment

#### Prerequisite

Follow steps 1 to 2 in Section 8.6.3.1.

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

In the list of plan items associated with the **Pre-Employment Services** sub-goal, click the checkbox next to **PES Stipend - Payment**.
Step 4: Add Plan Item Page

The PES Stipend plan item must be completed for each pay period where the client is paid a portion of the overall stipend. **Actual Start Date** and **Actual End Date** refer to the pay period upon which the payment to the client was based. Note, that if the pay period crosses the ministry’s fiscal year, it must be split into two plan items (e.g., March 24-31; April 1-7). **Hours Paid** refers to the number of actual workshop hours undertaken as they relate to the particular stipend payment and the **Actual Cost** is the Gross Amount of the PES Stipend Payment made to the client for each period.

This plan item is unique and requires the **Actual Start Date**, **Actual End Date**, **Hours Paid**, and **Cost** to be entered at the time of creation.
8.6.3.3 Add Plan Item: Placement

Prerequisite

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

Follow steps 1 to 2 in Section 8.6.3.1.

 getchar() Step 3: Select Plan Item Type Page

In the list of plan items associated with the Job Matching, Placements and Incentives sub-goal, click the checkbox next to Placement with Incentive or Placement without Incentive.
**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.
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) relating to the placement, and the Estimated Cost that has been negotiated with the employer (if it is a Placement without Incentive, this field can be left blank). Complete all the fields in the Placement 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.

### 8.6.3.4 Add Plan Item: Custom Plan Item

Follow steps 1 to 2 in Section 8.6.3.1.

בטא Step 3: Select Plan Item Type Page

In the list of plan items, click the checkbox next to Custom Basic Plan Item
Step 4: Add Plan Item Page

Complete fields as necessary. Unlike other plan item types, the **Name** is a free text field. For **Expected Outcome**, 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.

### 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.

**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.

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

8.6.5 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.

### 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 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

✔ 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 and complete Placement Information. Select a value for Employment Satisfaction. 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
• PES Stipend

Job Matching, Placements and Incentives
• Placement with Incentives – General
• Placement with Incentives – Job Trials
• Custom Basic Plan Item
• Job Placement Support

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

The Actual Start Date of any placement plan item can only be entered if the sum of the PES plan items hours (excluding the PES Stipend Payment Plan Item) equals or exceeds 60 hours for YJC and 20 hours for YJCS.

突发事件 Step 5: Plan Content Page

The Status has now changed to “Completed” and the Outcome has now changed to “Attained.”
When modifying a plan item in the Pre-Employment Services sub-goal and the PES Hours are entered, the total number of attained hours will be calculated and displayed on the Service Plan Home page.

### 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 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

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.
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.
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.

 предназначено для информирования о процедуре удаления подцелей.

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.

8.6.8.1 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.
8.6.9 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 - for the auto-generation of reviews.

**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”.

If the **Closure Reason** is “Completed,” all three mandatory sub-goals (Client Service Planning and Coordination, Pre-Employment Services and Job Matching, Placement and Incentives) must have an **Outcome** of “Attained.”

YJC Service plans with the following plan items in a “Completed” **status** with an **outcome** of Attained with an actual start date after January 1, 2018 will trigger program-specific questions related to the Employing Young Talent Incentive in a mandatory 3 and 6 month review:

- Placement with Incentives - General
- Placement without Incentives - General
- Placement - SP Payroll
- Job Match

**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’.

The fields will differ for YJCS.

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.

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

צרק Step 1: Service Plan Home Page
When a service plan is closed, the system will automatically generate the 3-month follow-up review for ES. 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.

Click the Events tab.

YJCS does not have 6-month reviews.

צרק Step 2: List View Page
The review related to the service plan will appear in the Events List.
8.6.11 Create Review (Manually)

Prerequisite

The service plan must be closed.

❖ Step 1: Service Plan Home Page

Click the Events tab.

❖ 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 (3, 6 or 12 months for YJC and 3 or 12 months for YJCS). The Expected End Date must be the same as the Scheduled Start Date. Click SAVE or SAVE & NEW.

Step 4: 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.

8.6.12 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: 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.
The fields will differ for YJCS.

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.

龇 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 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.