Chapter 8E: Service Plan Management for Youth Job Link

(Discontinued Program)
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<table>
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<tr>
<th>Version #</th>
<th>Date</th>
<th>Description</th>
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<td>May 2016</td>
<td>Initial version released with the launch of EOIS-CaMS Release 6.0</td>
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<td>1.1</td>
<td>November 2016</td>
<td>Updates to reflect Release 6.3</td>
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<tr>
<td>1.2</td>
<td>June 2017</td>
<td>Removed reference to Targeted Initiative for Older Workers</td>
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<td>1.3</td>
<td>September 2017</td>
<td>Updates to reflect Release 17.3</td>
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<td>• Service Delivery Site selection template</td>
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<td></td>
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<td>• Adding sub-goal streamlined</td>
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<td>• Ability to add multiple plan items</td>
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<td>• Remove Plan Item Owner and Responsibility sections from plan items</td>
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<td>• Add Total Supports on Service Plan Home page</td>
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<td>1.5</td>
<td>August 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 to reflect new fields on EO profile and client summary</td>
</tr>
<tr>
<td>1.7</td>
<td>July 2019</td>
<td>Added note that YJL has been discontinued and new YJL service plans can no longer be created</td>
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8.1 Introduction

Note: This chapter deals exclusively with the Youth Job Link (YJL) 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. For SkillsAdvance Ontario (SAO), refer to Chapter 8F.

Note: Effective April 1, 2019, Youth Job Link has been discontinued. Service Providers can edit existing YJL service plans but cannot create new ones.

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 YJL service plan goal is “Employment or Access to 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 YJL service plan sub-goal is:

- Job Match

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 YJL 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>
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<tr>
<td>Ministry Caseworker</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

*As of April 1, 2019, Youth Job Link has been discontinued. Service Providers can edit existing YJL service plans but cannot create new ones.
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 must be between the ages of 15 and 29.

System Steps

纪律 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 Link” as the Program. Note that the Program that is selected determines the relevant choices available for the Template. Click SAVE.

Step 3: Service Plan Home Page

Ensure that all information in the service plan is correct.

The system auto-creates the one mandatory YJL 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.

**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 YJL. Complete all fields, and click SAVE.
8.6.2 Add Plan Item

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

8.6.2.1 Add Plan Item: Supports

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

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

 Française Step 3: Select Plan Item Type Page
Click the checkbox beside the appropriate Plan Item.
**Step 4: Add Plan Item Page**

This plan item is unique and requires the **Actual Start Date**, **Actual End Date**, and **Cost** to be entered at the time of creation.

### Add Plan Item:

<table>
<thead>
<tr>
<th>Details</th>
<th>Supports for Individuals - Clothing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sub-Goal</td>
<td></td>
</tr>
<tr>
<td>Primary Client</td>
<td></td>
</tr>
<tr>
<td>Actual Start Date *</td>
<td>04/09/2018</td>
</tr>
<tr>
<td>Actual Cost *</td>
<td>77.00</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Job Match</strong></td>
<td></td>
</tr>
<tr>
<td>Black Bird</td>
<td></td>
</tr>
<tr>
<td><strong>Name</strong></td>
<td></td>
</tr>
<tr>
<td>Outcome</td>
<td></td>
</tr>
<tr>
<td><strong>Supports for Individuals - Clothing</strong></td>
<td></td>
</tr>
<tr>
<td>Paid</td>
<td></td>
</tr>
<tr>
<td>**Actual End Date *</td>
<td>30/09/2018</td>
</tr>
<tr>
<td><strong>Comments</strong></td>
<td></td>
</tr>
</tbody>
</table>
Actual Cost for all Employer Incentive and Employment Support plan items with an Outcome of “Paid” cannot exceed a combined total of $300. Actual Cost for all Disability Support plan items with an Outcome of “paid” cannot exceed a combined total of $600.

Status of the plan item will be automatically set to “Completed” once the record is saved.

8.6.2.2 Add Plan Item: Placement

Prerequisite

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

Follow steps 1 to 2 in Section 8.6.3.1.

 spécialisé Step 3: Select Plan Item Type Page

In the list of plan items associated with the Job Match sub-goal, click the checkbox next to Employer 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 **Outcome** will pre-populate. The **Actual Start Date**, **Actual End Date**, and **Cost** to be entered at the time of creation click SAVE and EXIT.

The sum of actual costs for “Job Match – Employer Incentive” will display as **Total Supports** on the service plan home page.

**Actual Cost** for all **Employer Incentive** and **Employment Support** plan items with an **Outcome** of “Paid” cannot exceed a combined total of $300.

**Status** of the plan item will be automatically set to “Completed” once the record is saved.
8.6.3 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

ļ Step 1: Service Plan Home Page

Review the service plan, and select SUBMIT FOR APPROVAL from the **Action Button**.

ļ 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.”

### 8.6.4 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.

Click **SELECT** and **Reason** is set to “Initial.”

### 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**.

---

8.6.5 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.”
8.6.5.1 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.

8.6.5.2 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**.
Step 5: Plan Content Page

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

### 8.6.6 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.

**Modify Sub-Goal**

<table>
<thead>
<tr>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
</tr>
<tr>
<td><strong>Outcome</strong></td>
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<tr>
<td><strong>Owner</strong></td>
</tr>
<tr>
<td><strong>Comments</strong></td>
</tr>
</tbody>
</table>

![Modify Sub-Goal screenshot]

- **Step 3: Plan Content Page**

The **Outcome** has changed.

<table>
<thead>
<tr>
<th>Plan Content</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name of Sub-Goal</strong></td>
</tr>
<tr>
<td>Job Match</td>
</tr>
</tbody>
</table>

**8.6.6.1 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.

<table>
<thead>
<tr>
<th>Plan Content</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name of Sub-Goal</strong></td>
</tr>
<tr>
<td>Job Match</td>
</tr>
<tr>
<td>Job Match</td>
</tr>
</tbody>
</table>

- **Step 2: Modify Sub-Goal Page**

Select the appropriate **Outcome** item from the drop-down menu, and click SAVE.
8.6.7 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”.

Step 3: Plan Content Page

The Outcome has changed.

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.
System Steps

✦ Step 1: Service Plan Home Page
From the **Action** Button, click **CLOSE**.

✦ Step 2: Close Service Plan Page
Complete all fields. The current case owner will default as the service plan **Reviewer**. To choose a different **Reviewer**, click on the magnifying glass and select the appropriate user. Click **Save**.

The **Closure Reason** cannot be changed once the service plan has been closed with a reason of ‘Opened in Error’.
If **Comments** need to be added related to the closure reason, this can be inputted into the Change Closure Details page, which can be found in the **Action Button** on the Service Plan Home page.

> Step 3: Close Service Plan Page

Click YES to close the service plan.

---

8.6.8 Reviews

There are no reviews (system-generated or manually created) for YJL 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.