Employment Ontario Information System (EOIS) Service Provider (SP) Connect

Service Provider User Guide

Chapter 1: Introduction and Navigation

Table of Contents

Document History

Version #	Date	Description
1.0	June 2015	Initial release version
1.1	December 2015	Update to format and readability
1.2	February 2016	Updates for Release 3.1
1.3	June 2017	Updated to include new functionality related to monitoring reports, the print icon and online help
1.4	August 2017	Updated screenshots to reflect Help (vs Online Help)
1.5	December 2017	Update calendar screenshot and reference to due dates excluding government recognized statutory holidays

1.1 Introduction

The EOIS Service Provider Connect (SP Connect) application will provide a consistent and streamlined approach for the ministry and service providers to manage transfer payment agreements. SP Connect provides service providers with online access to their agreement details to view the most up-to-date site target and financial information, including agreements, allocations and payment schedules and report submission e.g. Estimate of Expenditures Report.

1.2 Structure and Content of the User Guide

The user guide for SP Connect is structured into chapters which focus on specific roles and functions within the system. The user guide chapters have been developed to provide end users with step-by-step instructions on how to use the system to support the management and administration of Transfer Payment Agreements.

1.3 Using the Guide

System users should consider the following when using this guide:

- Users must obtain the necessary system access permissions to accomplish the specific system tasks outlined in the user guide.
- It is recommended that readers use the online resource rather than a printed copy of the guide as updates occur regularly. All user guides are located on the Employment Ontario Partners' Gateway (EOPG) Internet.
- When using the guide electronically, clicking on hyperlinks will bring the user to the relevant material within the document or to other chapters on the EOPG Internet.
- Throughout the user guide specific types of items are distinguished through text styles:
  - LINKS and ACTIONS are all caps;
  - Proper titles, such as the **title of an information panel** or a **field name** are bold.
- Text in square brackets denotes page or item specific information and is system generated, e.g. View Agreement [PO Number] = View Agreement 25876.

1.4 System Access and Accessibility

This system is designed to meet the Accessibility for Ontarians with Disabilities Act (AODA) standards.

1.5 Browser and Display Considerations

The minimum screen resolution for the system is 1024 x 768. For information on how to change the screen resolution in Windows (for other operating systems, please refer to relevant documentation), see Microsoft.com.

Most web browsers are compatible with EOIS SP Connect, but Internet Explorer is recommended. Text size can be increased, if needed, within the browser. For example, in Internet Explorer, this can be found under "View."

1.6 Browser Buttons

It is not recommended to use the BACK and FORWARD buttons in the web browser. While they work in some situations, if the user is on a page where a submission is completed, and the browser buttons are used, the system will time-out. To effectively move through the pages of the system, see Section 1.10 Main Content Area for a description of the breadcrumb trail.

1.7 Time-Out Periods

A time-out is when the user is automatically logged out of the system. The time-out will occur when the system considers the user to be inactive. In order to be active, a user has to have clicked on a link or perform an action within the current page. The time-out period is 20 minutes, and this cannot be adjusted. If the system times out, data that was on a page that had not yet been saved will be lost.

For periods of heavy use, for example when there is a due date, system performance may be slower due to heavy volume, and will result in a time-out. It is recommended that users work with items that are due on paper (e.g. Estimate of Expenditure Reports) and input the data when ready and/or complete items that are due prior to the due date to avoid performance issues.
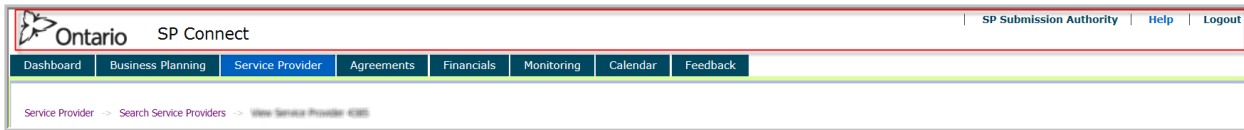
1.8 Service Provider Access

For access to SP Connect, please refer to the Start-Up Kit on EOPG.

1.9 Roles and Responsibilities

There are two roles in SP Connect for Service Providers. Each user guide chapter details the responsibilities for each role as they relate to the different business processes.

1.10 Main Content Area

The screen header is always present and displays the user name, role, help, logout icon, section panel and the breadcrumb trail.


The business process screens are grouped under distinct Sections which are tabs displayed at the top of the page:

- Dashboard
- Business Planning
- Service Provider
- Agreements
- Financials
- Monitoring
- Calendar
- Feedback

Clicking on each section will provide the user with access to the various functions that are related to that section.
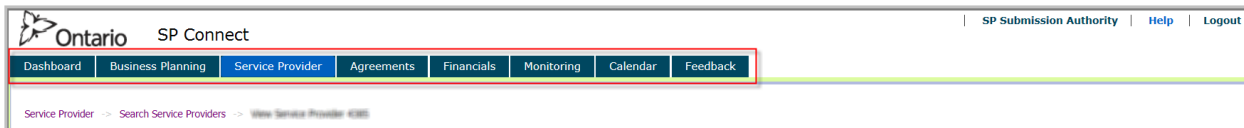
Navigation throughout the system creates a "breadcrumb trail" which displays the pages that have been viewed. The most current page will display at the end of the trail. The trail is a handy tool to move back to a previous screen by clicking on the breadcrumb links.
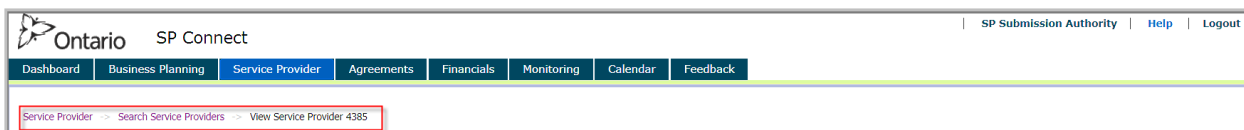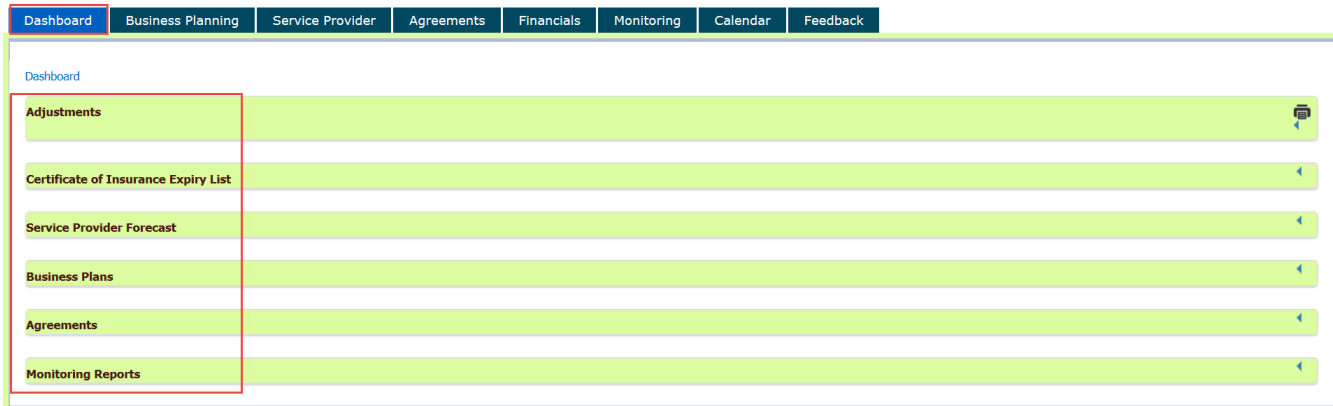
1.11 Dashboard

The Dashboard is the home page which displays information that requires action by the user.

The Dashboard consists of six panels:

- **Adjustments**: Displays any Payment or Target/Allocation adjustments that requires action. For more detail on this functionality, please refer to Chapter 2: Agreement Management.

- **Certificate of Insurance Expiry List**: Displays any Certificate of Insurance within 30 days of or past the expiration date which requires action.

- **Service Provider Forecast**: Displays any forecast reports, e.g. EERs, that are due or require action. For more detail on how to use this functionality, please refer to Chapter 3: Monitoring.
- **Business Plans**: Displays any Business Plans that are due or require action. For more detail on this functionality, please refer to Chapter 5: Business Plan Management.
- **Agreements:** Displays any Agreements that require action. For more detail on this functionality, please refer to Chapter 2: Agreement Management.
- **Monitoring Reports:** Displays any Monitoring Reports that are due or require action. For more details on this functionality, please refer to Chapter 3: Monitoring.
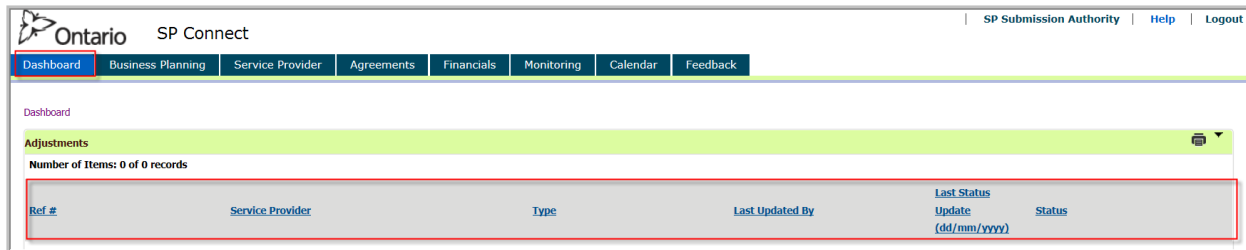

Dashboard Adjustment Panel

The **Adjustment** panel displays the following fields:

- **Ref#** - The adjustment reference number; hyperlinks to the **View Adjustment** page
- **Service Provider** – Legal name of the service provider
- **Type** – Payment or Target and Allocation
- **Last Updated By**– Name of the user who last updated the status
- **Last Status Update** – Date the last status was updated

- **Status** – Current status of the adjustment

Note: When an adjustment is Saved or Proposed, a reference number is assigned to the adjustment. The naming convention of an adjustment is: TA (Target/Allocation) or PY (Payment)-Service Delivery Site ID-Program-Sequential number.
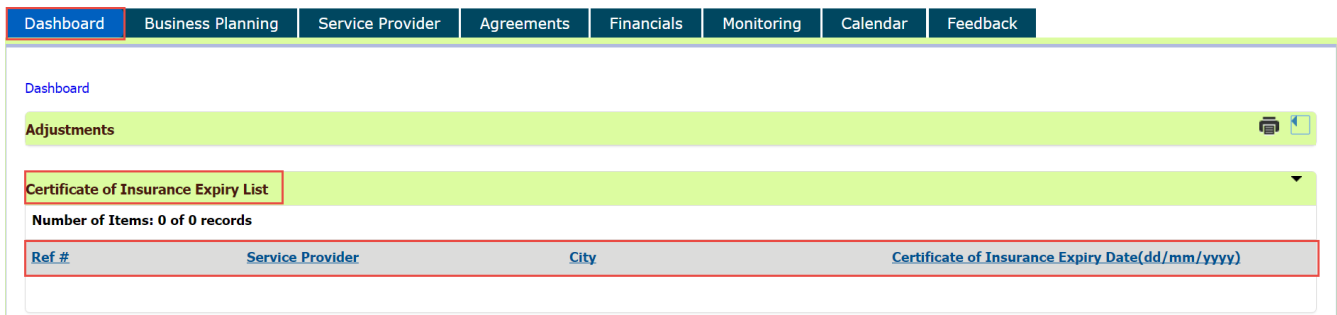

1.11.1 Dashboard Certificate of Insurance (COI) Expiry List Panel

The **Certificate of Insurance Expiry List** panel displays the following fields:

- **Ref#** - The Service Provider ID; hyperlinks to the **Service Provider** page
- **Service Provider** – Legal name of the service provider
- **City** – City based on the service provider business address
- **Certificate of Insurance Expiry Date** – The current COI expiry date

1.11.2 Dashboard Service Provider Forecast Panel

The **Service Provider Forecast** panel displays the following fields:

- **Site** – The service delivery site; hyperlinks to the **View Service Provider Forecast** page
- **Program**
- **Name** – Name of the forecast
- **Service Provider** – Legal name of the service provider
- **Due Date** – Date forecast is due
- **Date Submitted** – Date forecast was last submitted by service provider
- **Days Overdue** – Number of days the forecast overdue
- **Status** – Current status of the forecast

Dashboard	Business Planning	Service Provider	Agreements	Financials	Monitoring	Calendar	Feedback

Dashboard

Adjustments

Certificate of Insurance Expiry List

Service Provider Forecast

Number of Items: 4 of 4 records

Site	Program	Name	Service Provider	Due Date	Date Submitted	Days Overdue	Days Late	Status
2D	Employment Service	SRER		16/06/2017				Open

The system will only display records where the current system date is greater than or equal to the release date set by the ministry for a particular forecast report.

1.11.3   Dashboard Business Planning Panel

The **Dashboard Business Planning** panel displays the following fields:

- **ID** – The system generated number for the Business Plan; hyperlinks to the **View Business Plan** page
- **Program**
- **Service Provider** – Legal name of the service provider
- **Site** – Site reference number
- **Due Date** – Due date for business plans by program
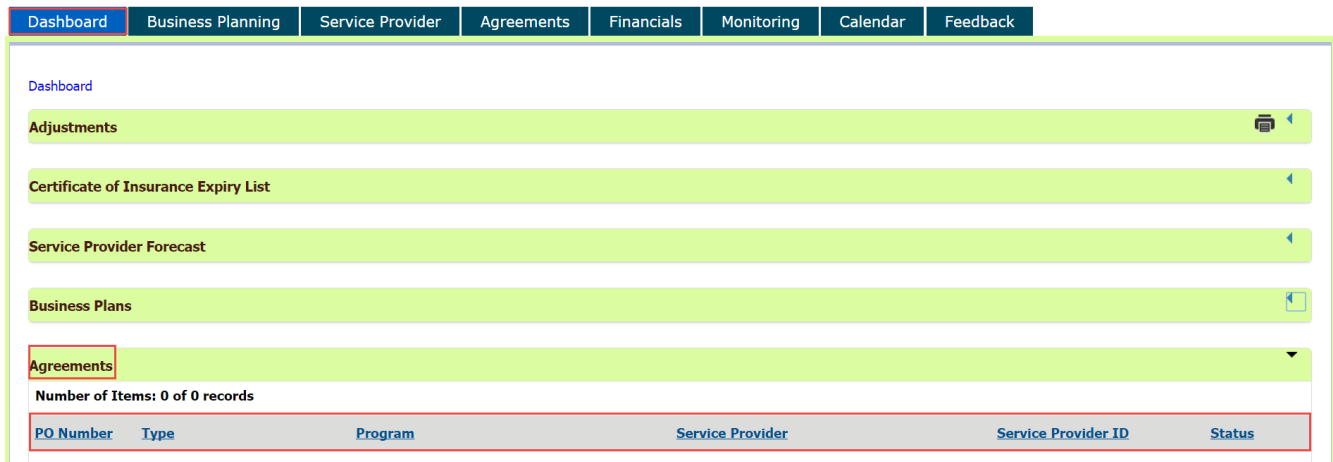- **Days Overdue** – Number of days the business plan is overdue
- **Status** – Current status of the business plan

Dashboard	Business Planning	Service Provider	Agreements	Financials	Monitoring	Calendar	Feedback

Dashboard

Adjustments   🖨 ◀

Certificate of Insurance Expiry List   ◀

Service Provider Forecast   ◀

Business Plans   ▼

Number of Items: 0 of 0 records

ID	Program	Service Provider	Site	Due Date	Days Overdue	Status

1.11.4   Dashboard Agreements Panel

Agreements or Amending Agreements appear for service providers in the status of Under Review. The status of Open, Accepted, E-Accepted and Pending active appear for the MRA role and E-Accepted and Pending Active appear for the MRD role.

The Agreements panel displays the following fields:

- **PO Number** – The PO number of the agreement; hyperlinks to **View Agreement** page
- **Type** – Agreement or amending agreement
- **Program**
- **Service Provider** – Legal name of the service provider
- **Service Provider ID** – Service Provider reference number
- **Status** – Current status of the agreement

Dashboard	Business Planning	Service Provider	Agreements	Financials	Monitoring	Calendar	Feedback

Dashboard

Adjustments

Certificate of Insurance Expiry List

Service Provider Forecast

Business Plans

Agreements

Number of Items: 0 of 0 records

PO Number	Type	Program	Service Provider	Service Provider ID	Status

1.11.5   Dashboard Monitoring Reports Panel

When monitoring reports such as Quarterly Status and Adjustment Reports (QSARs) or Quarterly Aggregate Data Reports (QADRs) are released to service providers for completion, they will appear on the Monitoring Reports panel of the Dashboard.

The Monitoring Reports panel displays the following fields:

- **Site** – The service delivery site which delivers the program or service
- **Program** – The program delivered at the service delivery site
- **Name** – The name of monitoring report (e.g. QSAR or QADR)
- **Provide Due Date** – the date the monitoring report is due

- **Days Overdue** – the number of business days late
- **Date Submitted** –the date the Ministry submits the report
- **Days Late** – If the report was submitted late, the number of days late
- **Ministry Due Date** – the date the Ministry is required to provide feedback on the monitoring report
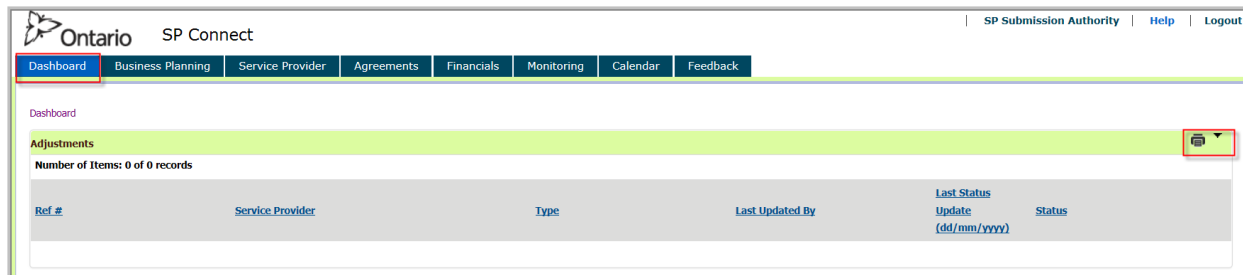- **Status** – the status of the monitoring report (E.g. open, submitted etc.)
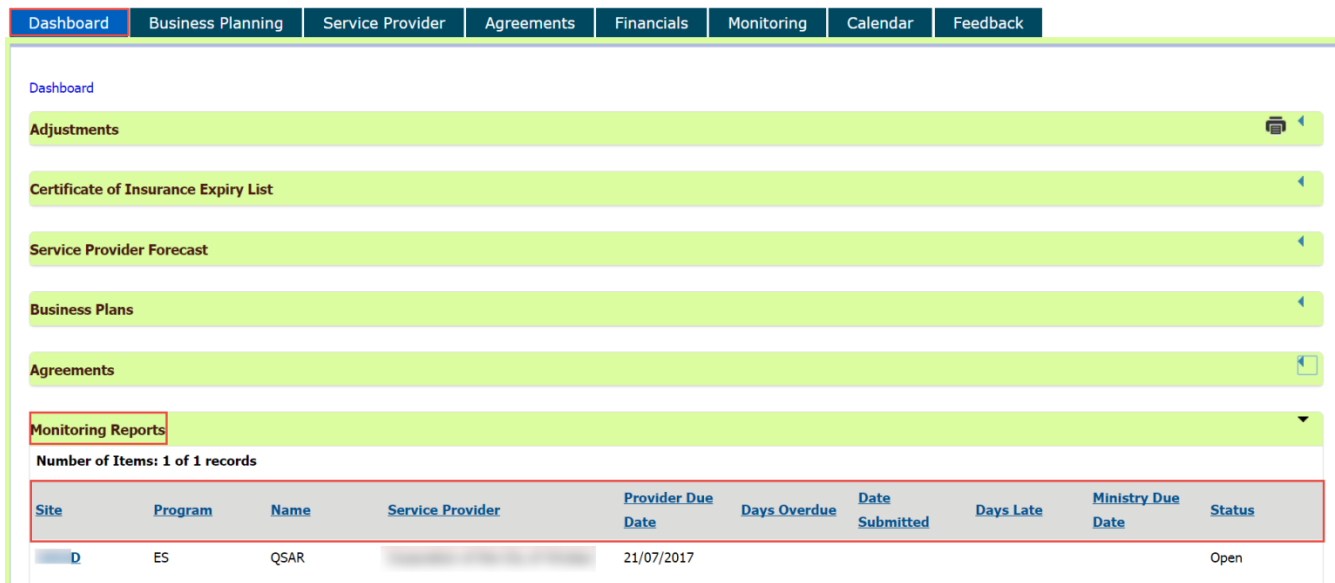
1.11.6   Dashboard Printing

The Dashboard can be printed by clicking on the **Print icon** shown at the top right corner of the **Adjustments panel**.

System Steps

Step 1: Click the print icon

Step 2: SP Connect will return a PDF version of the dashboard. Click the SAVE icon to save the PDF to your computer or click the PRINT icon to send the document to the

desired printer.
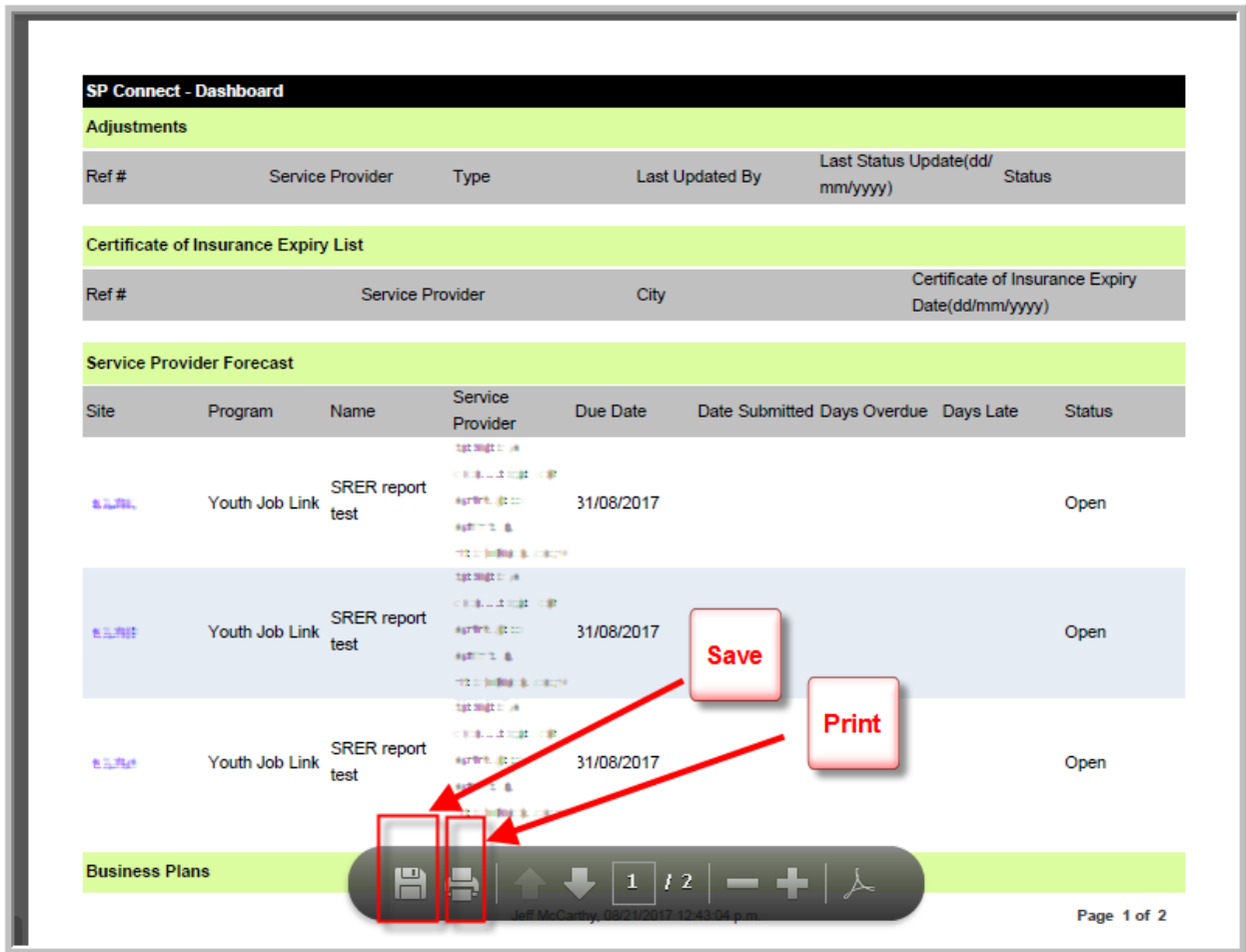
1.12 Help

A Help feature (previously Online Help) was built in SP Connect which will allows service providers and Ministry staff to view a virtual library of helpful topics and articles. The help is structured first by Help Category type, followed by Help Topic and Help Articles. Click the category folders, and topic and article sub-folders to view the help content.

1.13 Actions and Links

In SP Connect, actions are indicated by a link or a button. Links are displayed in blue and underlined.

A link in a panel header will sort the items by that field.
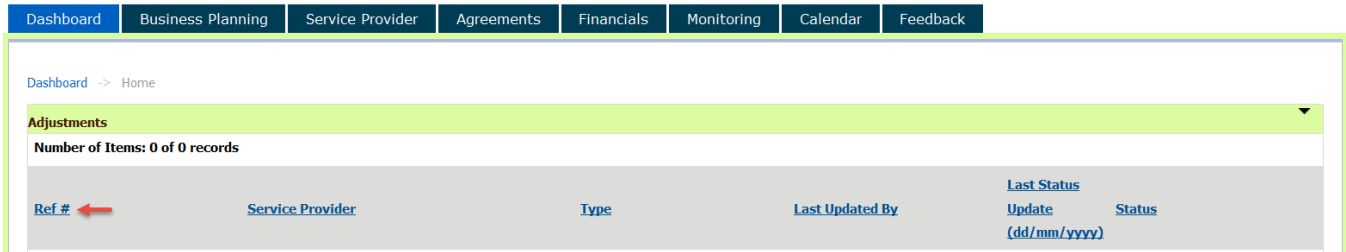
A link to an item will open that specific item or move the user directly to a specific page.
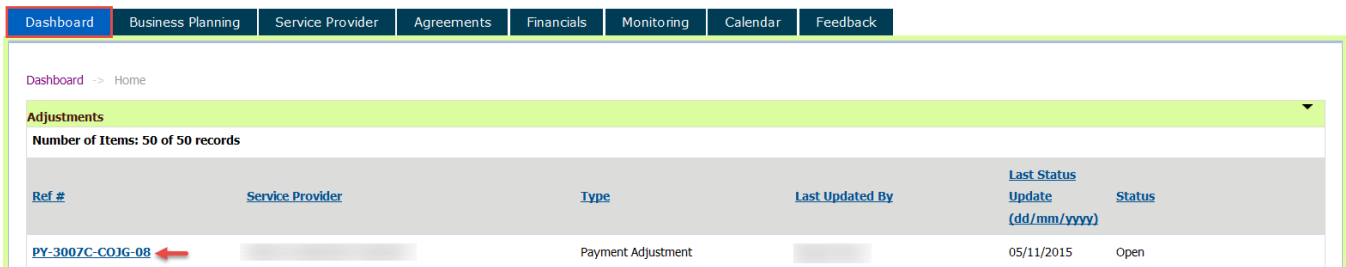

Action buttons appear on pages where the user can perform a function. The buttons differ based on the page, action required and user role.
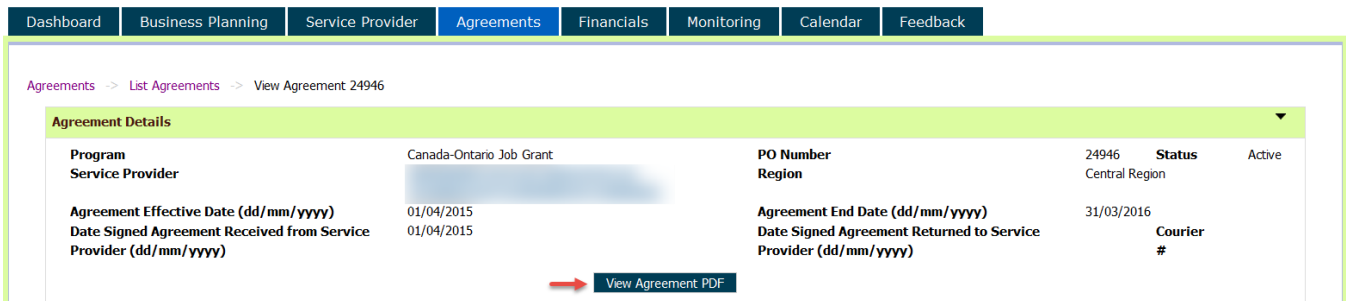
1.14 Section Expansion and Collapse

SP Connect has the ability to collapse or expand panel content allowing users to focus on the panel needed. To collapse or expand a panel, click on the Arrow in the far right hand corner of each panel.

In the screenshot below there are three panels of which only one is expanded and the rest are collapsed.
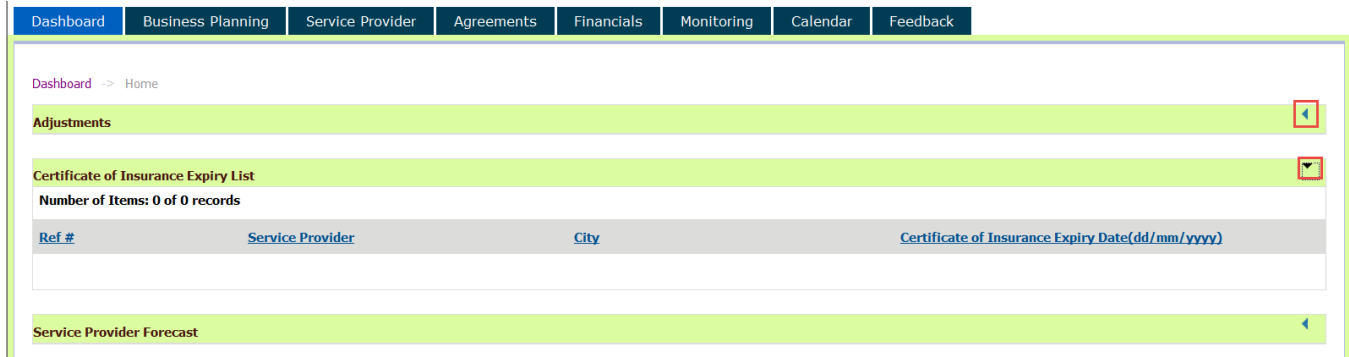

1.15 Search Functionality

Searching within SP Connect is limited to certain sections. For example, users can search for Agreements in the **Agreement** section, or reports in the **Monitoring** section. There is no search functionality within the **Dashboard**.

The following is an example of the Search Criteria screen in the **Monitoring** section.

Note: The Fiscal Year search criteria has been changed to Calendar Year.
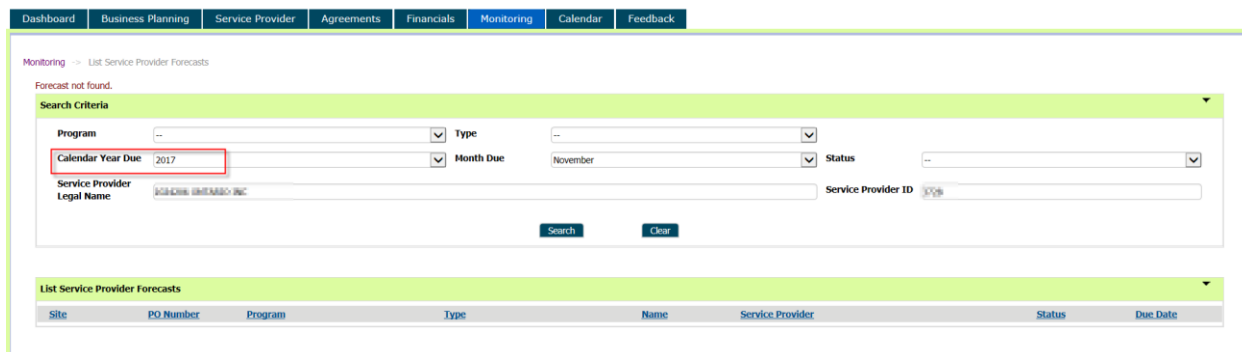
1.16 Calendar

The **Calendar** section displays events such as Business Plan and Estimate of Expenditure Report due dates and events created by the Ministry.

The Calendar section contains two panels. The **View Calendar** panel is a search panel where users can filter for a specific **Year** and **Month**.
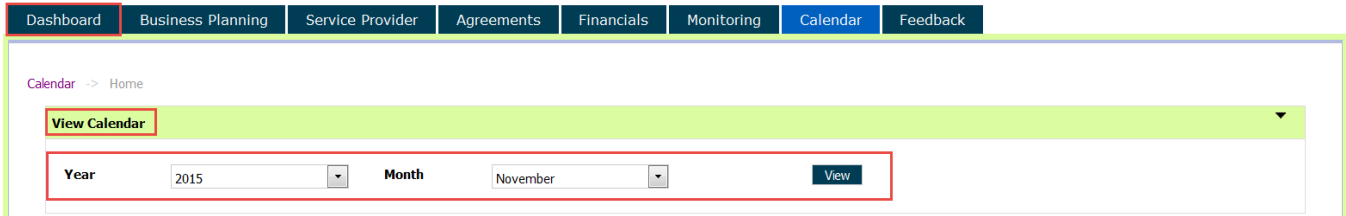
The **Scheduled Events** calendar shows the events for the month in calendar format. The **Left** and **Right** arrows at the top left of the calendar move one month ahead or back. The **Today** button will return the user to the current month. The **Month**, **Week** and **Day** buttons at the top right of the calendar change the format of the calendar to show only a day, the week or a full month.

Release Dates and Due Dates exclude any weekends and/or government recognized statutory holidays (example: Remembrance Day and Easter Monday).

All government recognized statutory holidays will be displayed on the calendar tab.
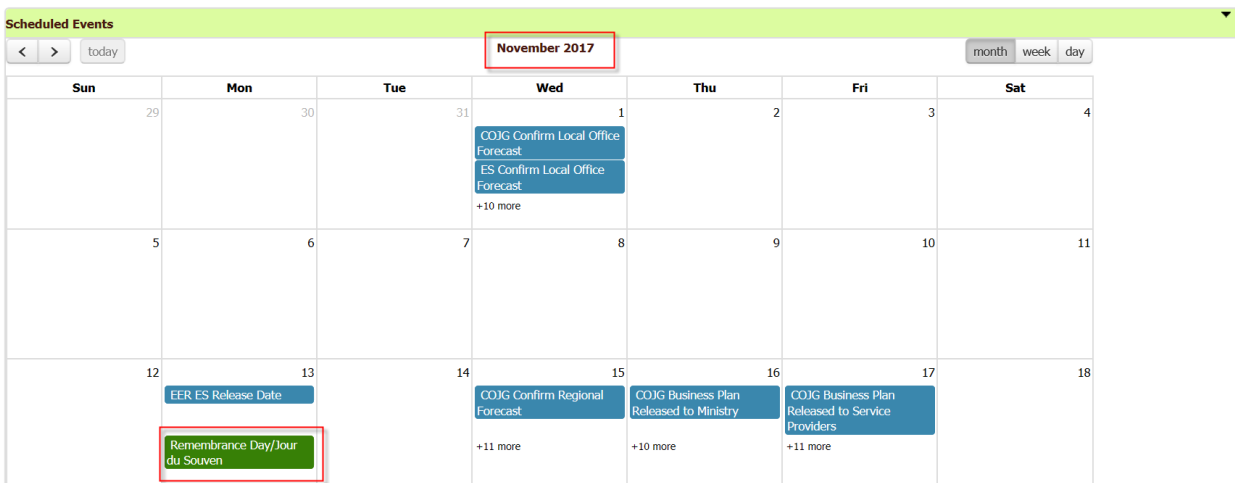
1.17 Feedback

This section gives service providers the opportunity to let the ministry know what they think about the system, and suggest future improvements on how they would like to see the system function. These suggestions will be taken into consideration in future releases. Simply type your feedback into the text box and press SEND, or CLEAR to return without submitting the feedback.

Note that the Feedback section is not to be used for technical support. To get support, please follow the support model detailed in the Start Up Kit, found in EOPG.