

# **Employment Ontario Information System (EOIS) Service Provider (SP) Connect Service Provider User Guide**



## **Chapter 4 – Service Provider Management**

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### Document History

Version #	Date	Description
1.0	September 2015	Initial version of guide
1.1	December 2015	Update to format and readability
1.2	February 2016	Adding Release 3.1
1.3	March 2016	Adding Release 3.1.1
1.4	May 2016	Updates for Release 3.2
1.5	July 2016	Updates for Release 4.0
2.0	March 2017	Updates for Release 4.2 – Addition of Risk Assessment Rating

## 4.1 Introduction

Service Provider (SP) Connect manages information and automates business processes related to selected Transfer Payment (TP) programs' delivery between Service Providers and the Ministry. This chapter focuses on how the Service Provider corporate and site information is viewed and maintained by Ministry and Service Provider users. For this release of SP Connect, Service Provider information is managed in both EOIS-CaMS and SP Connect.

The Service Provider record, which is called the **Service Provider Profile**, is unique to each organization. Currently, the core **Service Provider Profile** information is sourced from the **EOIS-CaMS Service Provider Profile** (for more information about changing **Service Provider Profile** information in EOIS-CaMS, refer to EOIS-CaMS [Service Provider User Guide](#)). **Service Provider Profile** fields that are managed in SP Connect are discussed in sections [4.3. Service Provider Page Overview](#) and [4.4 Site \[Site ID\] Page Overview](#) below.

## 4.2 Roles and Responsibilities

Both the Service Provider Administrator (SPA) and Service Provider Submission Authority (SPSA) roles can view their **Service Provider Profile** page and add/update/delete the **Corporate Details** panels' **Website** and **Service Provider Certificate of Insurance (COI)** fields. To update Corporate or Site Contact information please contact your ministry representative.

Ministry Local Office Consultants (MLC) assess program and service provider risk as part of the contract management process. Ministry Local Office Consultants, in consultation with their Service Delivery Manager, determine the risk level rating associated with a service provider. Once determined, the risk assessment rating is entered on the Service Provider Profile page and is visible to all SP Connect users. Service provider user roles are only able to view the risk assessment ratings that pertain to their organizations.

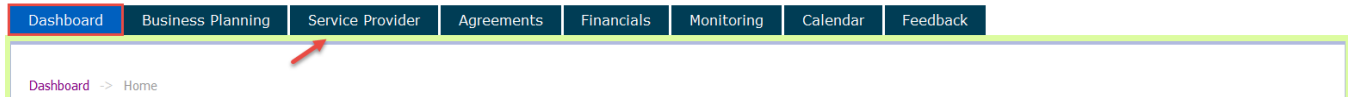
## 4.3 Service Provider Page Overview

The following describes how to access the **Service Provider** profile page.

### System Steps

#### ➡ Step 1: Dashboard

From the **Dashboard**, click the **Service Provider** section.



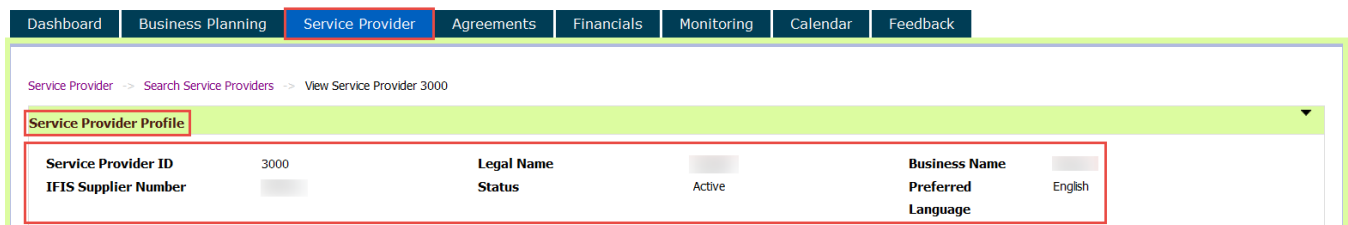
The Service Provider page has seven panels which are described below.

The **Service Provider Profile** panel displays the following information:

- **Service Provider ID** (Site ID)
- **Legal Name**
- **Business Name**
- **IFIS Supplier Number**
- **Status** (of the organization)
- **Preferred Language** (of the organization)

These fields are managed in EOIS-CaMS.

Note: The **Preferred Language** field is used to determine the language the system will convey information to the Service Provider including Business Plans, Agreements, system notifications, etc.

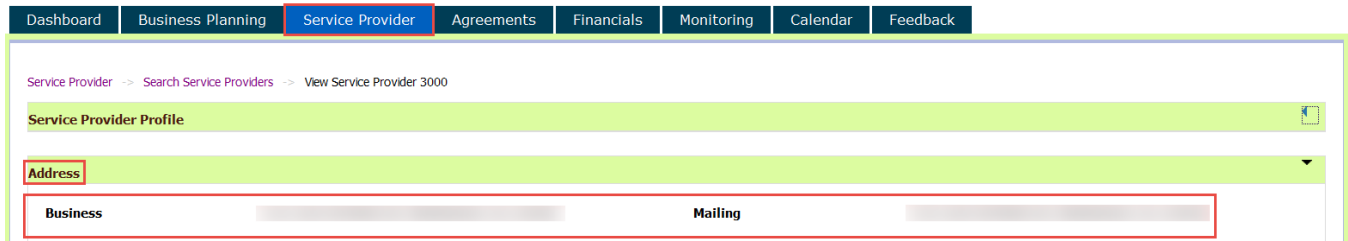


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The **Address** panel displays the following information:

- **Business Address**
- **Mailing Address**

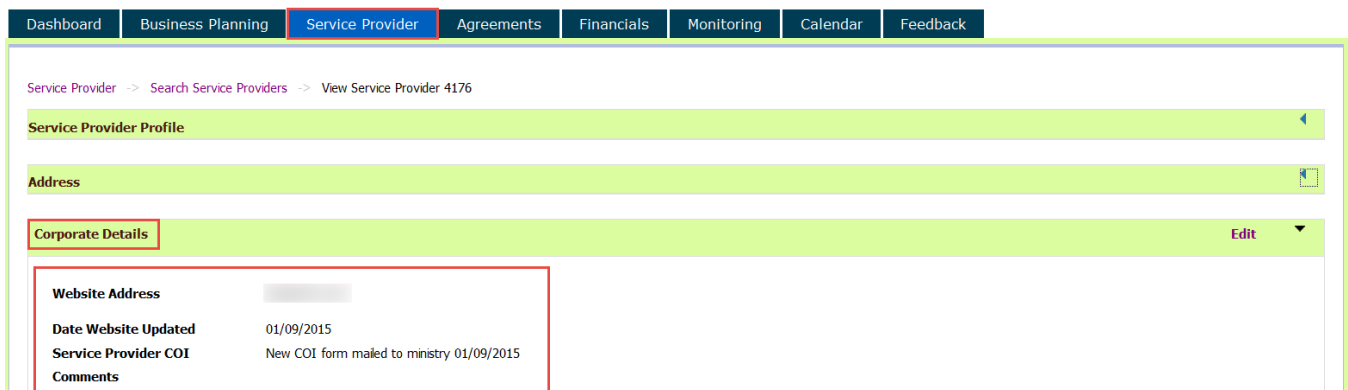
These fields are managed in EOIS-CaMS.



The **Corporate Details** panel displays the following information:

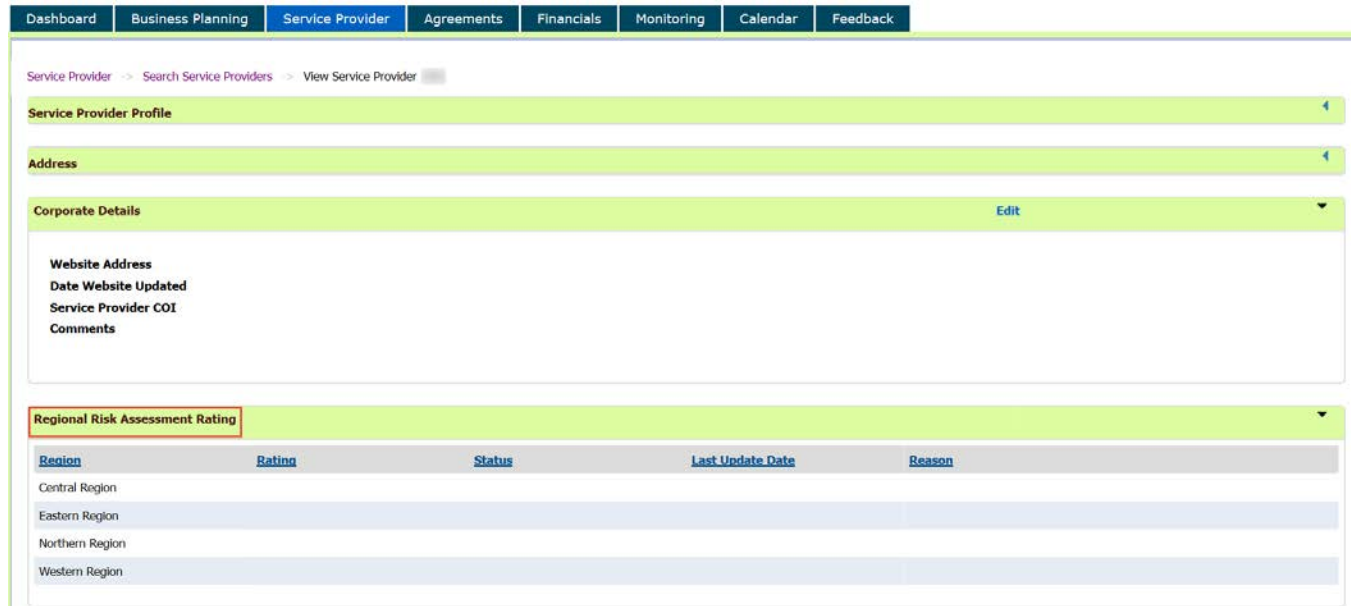
- **Website Address**
- **Date Website Updated**
- **Service Provider COI Comments**

These fields are managed within SP Connect by the Service Provider. For more information, see section [4.3.1 Corporate Details Panel](#).



The **Regional Risk Assessment Rating** panel displays the risk assessment ratings for each region in which a service provider has a service delivery site and delivers a program that has undergone a risk assessment process.

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The **Corporate Contacts** panel displays the following information:

- **Name**
- **Contact Type** (see below)
- **Title**
- **Telephone**
- **Email**
- **Corporate Contact**

**Contact Types** include:

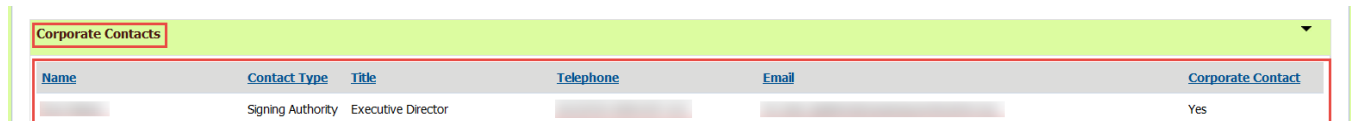
- **Corporate Contact**
- **Signing Authority**
- **Site Contact**
- **Other**

The **Signing Authority** is the person in the Service Provider organization that has been designated as the person who signs documents on behalf of the organization (e.g. Agreements, Amending Agreements, etc.). There can be as many Signing Authority roles as required by the providers' organization. Service providers can have the Corporate Contact designate as well as another contact type.

If the contact is the **Site Contact**, this information should be entered in the **Service Delivery Sites** panel of the View Service Provider Site [ID] page (see section [4.4 Site \[Site ID\] Page Overview](#)).

These fields are managed within SP Connect by the Ministry.

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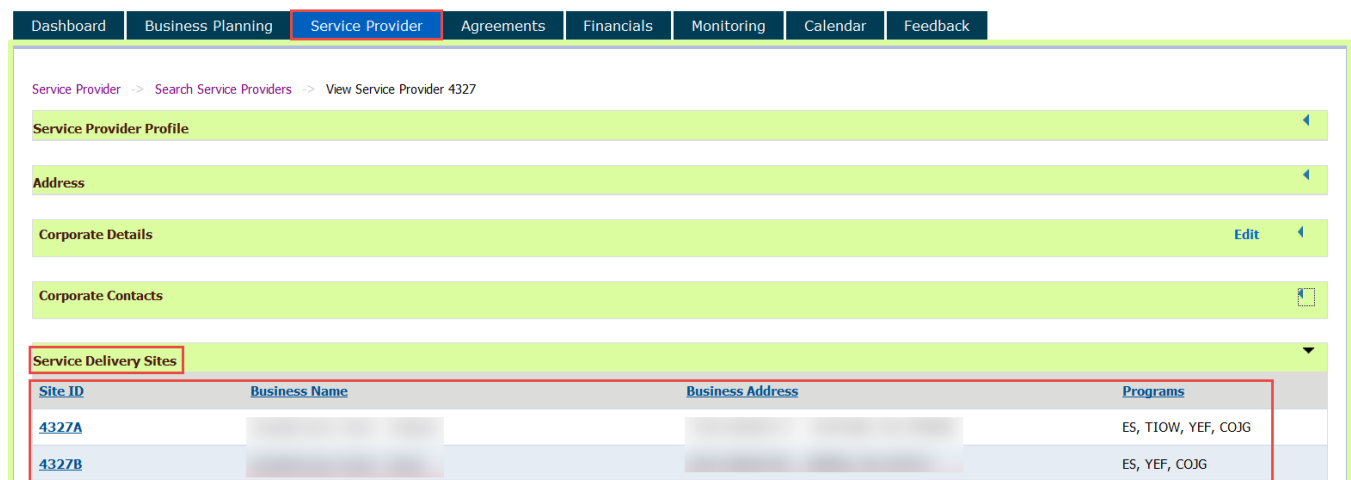
A screenshot of a web application interface showing a table titled "Corporate Contacts". The table has a light green header bar with the title and a dropdown arrow. Below the header, there is a table with columns: Name, Contact Type, Title, Telephone, Email, and Corporate Contact. A single row is visible with the following data: Name (blurred), Contact Type (Signing Authority), Title (Executive Director), Telephone (blurred), Email (blurred), and Corporate Contact (Yes).

Name	Contact Type	Title	Telephone	Email	Corporate Contact
	Signing Authority	Executive Director			Yes

The **Service Delivery Sites** panel lists all the sites in Active status associated with the Service Provider organization and displays the following information:

- **Site ID** (links to Site [Site ID] profile page)
- **Business Name**
- **Business Address**
- **Programs**

These fields managed in EOIS-CaMS.



A screenshot of a web application interface showing a navigation menu at the top with tabs: Dashboard, Business Planning, Service Provider (highlighted), Agreements, Financials, Monitoring, Calendar, and Feedback. Below the menu, there is a breadcrumb trail: Service Provider -> Search Service Providers -> View Service Provider 4327. The main content area has several sections: Service Provider Profile, Address, Corporate Details (with an Edit link), and Corporate Contacts. The "Service Delivery Sites" section is highlighted with a red box and contains a table with columns: Site ID, Business Name, Business Address, and Programs. Two rows are visible: 4327A (ES, TIOW, YEF, COJG) and 4327B (ES, YEF, COJG).

Site ID	Business Name	Business Address	Programs
4327A			ES, TIOW, YEF, COJG
4327B			ES, YEF, COJG

The **List Active Agreements** panel lists all the Agreements in Active status associated with the Service Provider organization and displays the following information:

- **Program**
- **PO Number** (linked to the Agreement page)
- **Status**
- **Fiscal Year**
- **Region**

These fields are populated by the SP Connect system. For more information about Agreements, see [Chapter 2 – Agreements Management](#).



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Dashboard | Business Planning | **Service Provider** | Agreements | Financials | Monitoring | Calendar | Feedback

Service Provider -> Search Service Providers -> View Service Provider 3000

Service Provider Profile

Address

Corporate Details [Edit](#)

Corporate Contacts [New](#)

Service Delivery Sites

**List Active Agreements**

Program	PO Number	Status	Fiscal Year	Region
Youth Employment Fund	24980	Active	2015-2016	Western Region
Canada-Ontario Job Grant	24884	Active	2015-2016	Western Region
Canada-Ontario Job Grant	25013	Active	2015-2016	Central Region

The **List Business Plan Packages** panel lists all the Business Plan Packages associated with the Service Provider organization in a status other than Closed. For Providers that have Business Plans in more than one region, a separate package for each region will be listed. The following information is displayed:

- **Program**
- **ID** (Template ID is a unique number assigned by the system when the template is created; links to the Business Plan page)
- **Status**
- **Effective Date**
- **End Date**
- **Region**

These fields are populated by the SP Connect system.

**List Business Plan Packages**

Program	ID	Status	Effective Date	End Date	Region
LBS-SD	1198010	Open	01/04/2016	31/03/2017	Western Region
LBS-SD	<a href="#">1208673</a>	Open	01/04/2016	31/03/2017	Central Region
LBS-SD	1208847	Open	01/04/2016	31/03/2017	Northern Region
COJG	1208943	Approved	01/04/2016	31/03/2017	Northern Region
ES	1209043	Open	01/04/2016	31/03/2017	Northern Region

## 4.3.1 Corporate Details Panel

The **Corporate Details** panel fields are unique to SP Connect and are not found within EOIS-CaMS. As discussed in section [4.2 Roles and Responsibilities](#), the **Website** and Service Provider specific **Certificate of Insurance (COI)** fields are managed by the Service Provider.

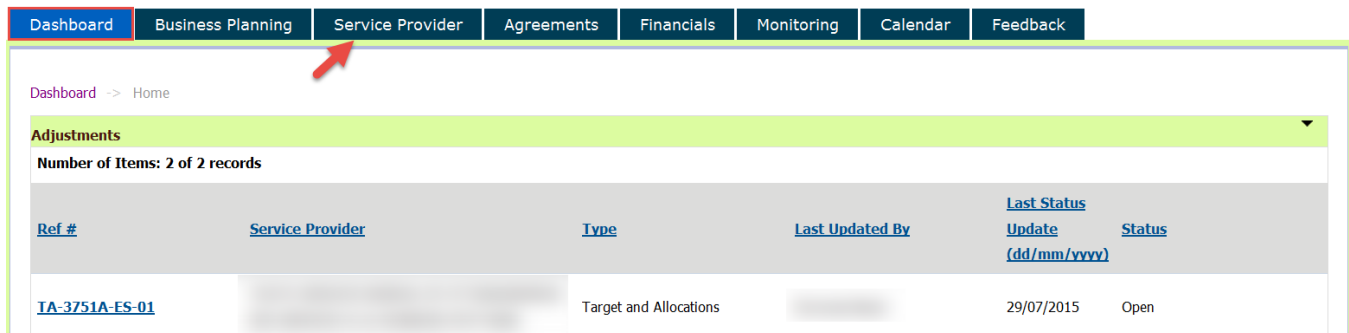
When the COI is within 30 days and 15 days of the expiration date, the system will send a notification to the Service Provider **Corporate Contact(s)** that an updated Insurance Certificate must be sent to the Ministry. Once the expiration date has passed, the system will send a notification to the Service Provider **Corporate Contact(s)** and scheduled payments will be withheld until the Ministry updates the **COI Expiry Date** field. The **Certificate of Insurance Expiry List** panel on the Dashboard shows the Site and Expiry date. Once the field is updated it applies to all sites in all regions that have activity with the Service Provider. See [Appendix 1](#) for examples of the notification e-mails.

The following steps describe how to update the **Corporate Details** fields.

### System Steps

#### ➡ Step 1: Dashboard

From the Dashboard, click the Service Provider page.



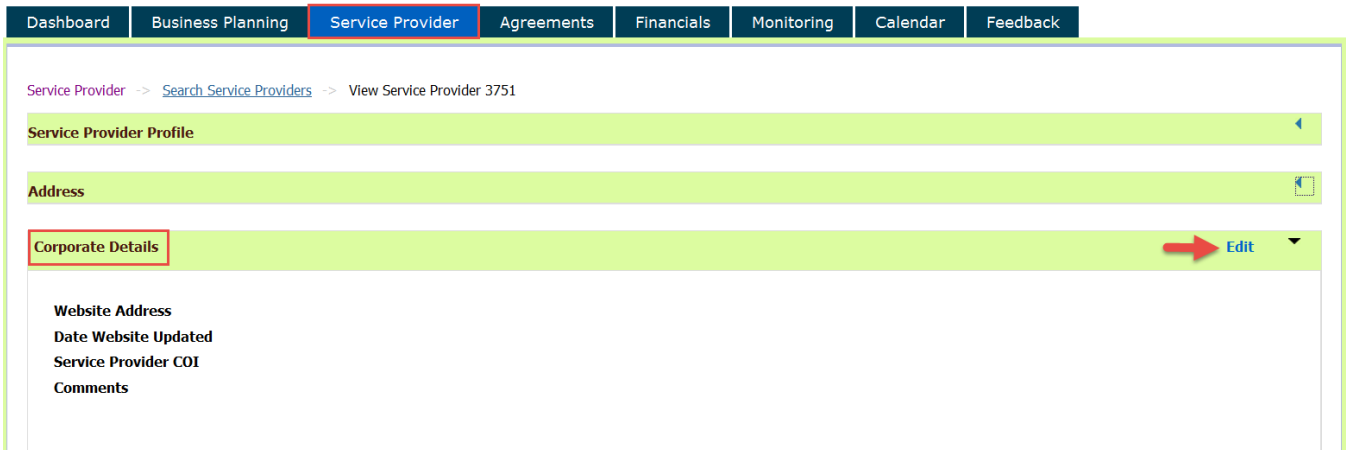
The screenshot shows the dashboard navigation menu with the following items: Dashboard, Business Planning, Service Provider, Agreements, Financials, Monitoring, Calendar, and Feedback. The 'Service Provider' item is highlighted with a red arrow. Below the menu, the breadcrumb 'Dashboard > Home' is visible. A section titled 'Adjustments' shows 'Number of Items: 2 of 2 records'. A table below lists the adjustments with columns for Ref #, Service Provider, Type, Last Updated By, Last Status Update (dd/mm/yyyy), and Status.

Ref #	Service Provider	Type	Last Updated By	Last Status Update (dd/mm/yyyy)	Status
<a href="#">IA-3751A-ES-01</a>		Target and Allocations		29/07/2015	Open

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## ➡ Step 2: View Service Provider [Site ID]

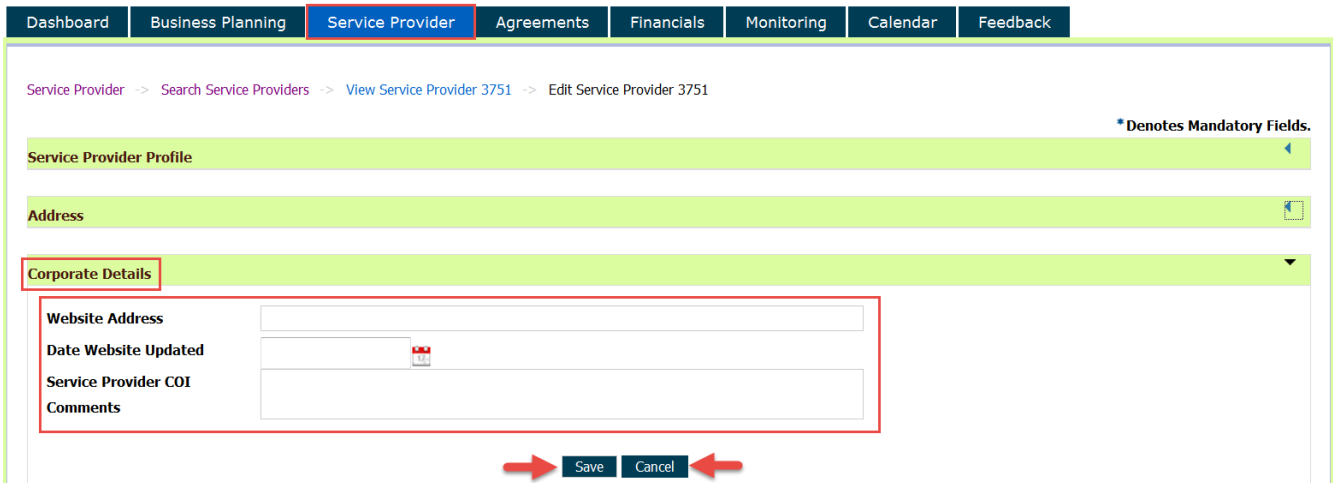
In the **Corporate Details** panel, click the EDIT button.



The screenshot shows a navigation bar with tabs: Dashboard, Business Planning, Service Provider (highlighted), Agreements, Financials, Monitoring, Calendar, and Feedback. Below the navigation bar, the breadcrumb trail reads: Service Provider > Search Service Providers > View Service Provider 3751. The main content area is divided into three sections: Service Provider Profile, Address, and Corporate Details. The Corporate Details section is highlighted with a red box and contains the following fields: Website Address, Date Website Updated, Service Provider COI, and Comments. A red arrow points to the 'Edit' button in the top right corner of the Corporate Details section.

## ➡ Step 3: View Service Provider [Site ID]

Update the required information and click SAVE to store the updates or CANCEL to go back without saving the updates. (The **Comments** field has a maximum characters of 250.)



The screenshot shows the 'Edit Service Provider' page. The navigation bar is the same as in Step 2. The breadcrumb trail reads: Service Provider > Search Service Providers > View Service Provider 3751 > Edit Service Provider 3751. The main content area is divided into three sections: Service Provider Profile, Address, and Corporate Details. The Corporate Details section is highlighted with a red box and contains the following fields: Website Address, Date Website Updated, Service Provider COI, and Comments. The 'Save' and 'Cancel' buttons are highlighted with red arrows. A legend in the top right corner indicates that an asterisk (\*) denotes mandatory fields.

## 4.3.2 View the Risk Assessment Rating

The following steps show how to view the service provider’s Risk Assessment Rating, by region.

### System Steps

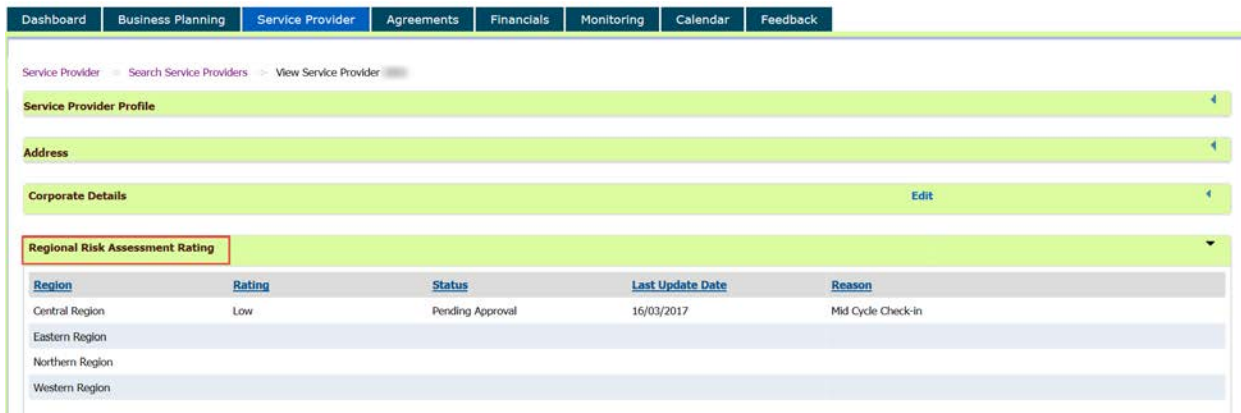
#### ➤ Step 1: Dashboard

From the Dashboard, click the Service Provider page.



#### ➤ Step 2: View Service Provider Page

The Regional Risk Assessment Rating panel can be found mid-way down the page.



## 4.4 Site [Site ID] Page Overview

The Site [Site ID] page can be viewed by clicking the SITE ID link in the **Service Delivery Sites** panel on the View Service Provider [Site ID] page.



The Site [Site ID] page has six panels.

The **Service Delivery Site Profile** panel displays the following information:

- **Site (ID)**
- **Site Business Name**
- **Service Provider** (hyperlink to the Service Provider page)
- **EO Self Service Notification Email**
- **Preferred Language**
- **Designated Francophone**

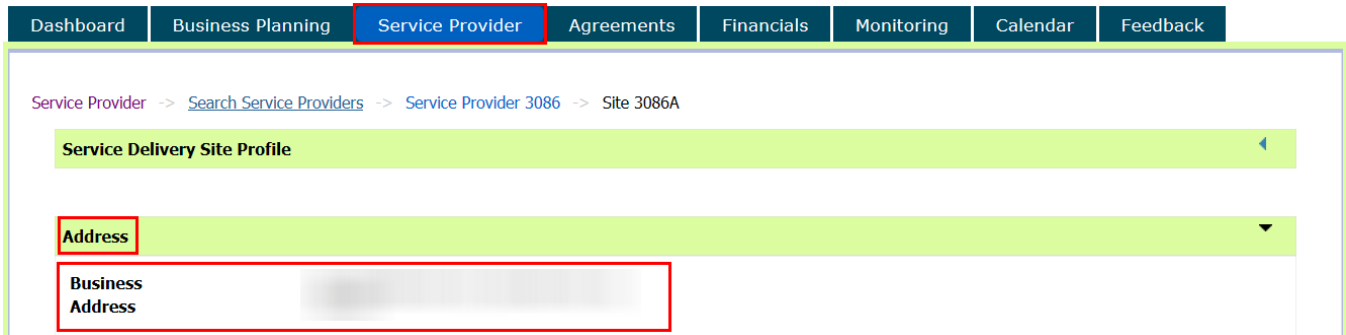
These fields are managed in EOIS-CaMS.



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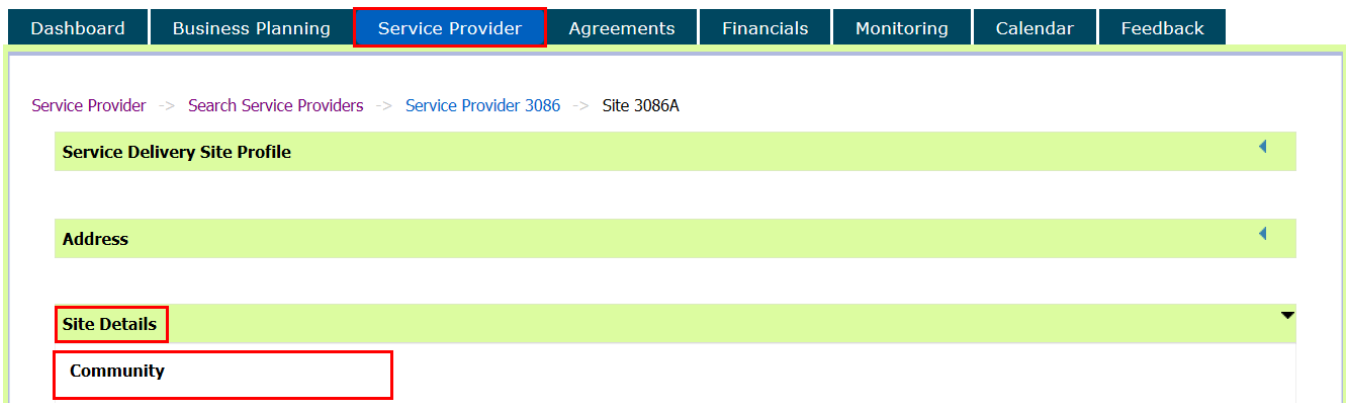
The **Address** panel displays the **Business Address**.

This field is managed in EOIS-CaMS.



The **Site Details** panel displays the **Community** field which indicates the community served by the site.

This field is managed within SP Connect by the Ministry.



The **Site Contacts** panel displays the following information:

- **Name**
- **Contact Type**
- **Title**
- **Telephone**
- **Email**

These fields are managed within SP Connect by the Ministry.

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Dashboard | Business Planning | **Service Provider** | Agreements | Financials | Monitoring | Calendar | Feedback

Service Provider -> Search Service Providers -> Service Provider 4327 -> Site 4327A

**Service Delivery Site Profile**

**Site Contacts**

Name	Contact Type	Title	Telephone	Email
	Corporate Contact	President		

The **List Services** panel displays the following information (a service is a program):

- **Program**
- **PO Number** (links to the Agreement page)
- **Status**
- **Effective Date**
- **End Date**
- **Employment Training Consultant**
- **Manager** (Ministry Local Office)
- **TP Accountability Office** (Local Office)

These fields are managed in EOIS-CaMS.

Dashboard | Business Planning | **Service Provider** | Agreements | Financials | Monitoring | Calendar | Feedback

Service Provider -> Search Service Providers -> Service Provider 3898 -> Site 3898A

**Service Delivery Site Profile**

**Site Contacts** New

**List Services**

Program	PO Number	Status	Effective Date	End Date	Employment Training Consultant	Manager	TP Accountability Office
Canada-Ontario Job Grant	<a href="#">24988</a>	Active	01/04/2015	31/03/2016			Peel
Youth Employment Fund	<a href="#">25148</a>	Active	01/04/2015	30/09/2015			Peel
Employment Service	<a href="#">24237</a>	Active	01/04/2015	31/03/2016			Peel

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The **List Business Plans** panel displays the following information:

- **Program**
- **ID** (a unique number generated by the system; linked to the Business Plan)
- **Status**
- **Effective Date**
- **End Date**

These fields are managed in EOIS-CaMS.

The screenshot shows the EOIS-SP Connect interface. At the top, there is a navigation bar with tabs: Dashboard, Business Planning, Service Provider (highlighted), Agreements, Financials, Monitoring, Calendar, and Feedback. Below the navigation bar, the breadcrumb trail reads: Service Provider > Search Service Providers > Service Provider 3898 > Site 3898A. The main content area contains several panels: Service Delivery Site Profile, Site Contacts (with a 'New' button), List Services, and List Business Plans (highlighted with a red box). The List Business Plans panel displays a table with the following data:

Program	ID	Status	Effective Date	End Date
Canada-Ontario Job Grant	<a href="#">1185728</a>	Active		



## 4.5 Reporting

Reports are available to service provider organizations to monitor their Service Provider Forecast Completion and Fiscal Payment Details.

### 4.5.1 Service Provider Forecast Completion Report

Service Providers may view the completion progress for a forecasting period.

#### System Steps

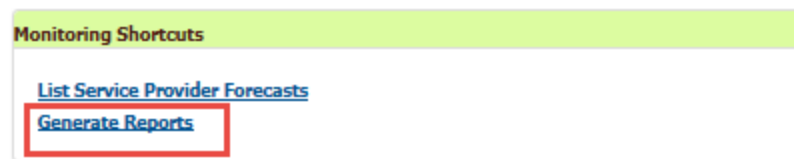
##### ➤ Step 1: Dashboard

From the **Dashboard**, select the **Monitoring** tab.



##### ➤ Step 2: Monitoring Page

From **Monitoring Shortcuts**, select **GENERATE REPORT**.



##### ➤ Step 3: Generate Reports Page

From the **Report Type** drop-down menu within **Monitoring Reports**, select "Service Provider Forecast Completion Report." Filter by **Program**, **Fiscal Year** and **Month**, and then click **GENERATE PDF**.



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The report will be generated in PDF format.

2016-2017 Service Provider Forecast Completion Report							
Service Provider Report	Open	Late	Submitted	Pending Resubmission	Days Overdue	Submission Date	Total # of Sites
July	3	3	0	0			3
Central Region							
Markham							
JOB SKILLS - EMPLOYMENT AND BUSINESS PROGRAMS AND SUPPORTS							
Canada-Ontario Job Grant	2	2	0	0			2
		0			0	Confirmed	
	X	5			0		
	X	5			0		
		0			0	Confirmed	
Peel							
JOB SKILLS - EMPLOYMENT AND BUSINESS PROGRAMS AND SUPPORTS							
Canada-Ontario Job Grant	1	1	0	0			1
		0			0	Confirmed	
	X	5			0		

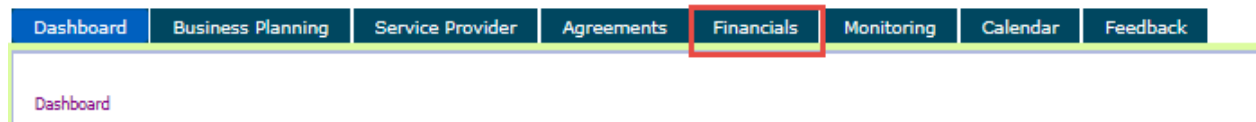
## 4.5.2 Fiscal Payment Detail Report

Service provider users are able to view payments processed, as well as upcoming scheduled payments at each site level.

### System Steps

➡ Step 1: Dashboard

From the **Dashboard**, select the **Financials** tab.



➡ Step 2: Financials Page

From the **Financials Shortcuts**, select GENERATE REPORT.



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## ➔ Step 3: Generate Reports Page

Within **Payment Reports**, filter the criteria to narrow the search results and click **GENERATE PDF**.

Financials -> Generate Reports

**Payment Reports**

**Report Type \*** Fiscal Payment Detail Report

**Month** June

**Fiscal Year \*** 2016-2017

**Program** Employment Service

Generate PDF

The report will generate in the form of a PDF.

2016-2017 Fiscal Payment Detail Report																	
PO Number	Total Current Allocation	Last Confirmed Forecast	Forecast Month	April	May	June	July	August	September	October	November	December	January	February	March	YTD	Cashflow
<b>Central Region</b>																	
<b>Employment Service</b>																	
<b>JOB SKILLS - EMPLOYMENT AND BUSINESS PROGRAMS AND SUPPORTS</b>																	
	\$1,003,500	\$0		\$83,625	\$83,625	\$83,625	\$83,625	\$83,625	\$83,625	\$83,625	\$83,625	\$83,625	\$83,625	\$83,625	\$83,625	\$83,625	\$250,875
	\$1,190,750	\$0		\$98,229	\$98,229	\$98,229	\$98,229	\$98,229	\$98,229	\$98,229	\$98,229	\$98,229	\$98,229	\$98,229	\$98,229	\$98,231	\$297,687
	\$508,600	\$0		\$42,383	\$42,383	\$42,383	\$42,383	\$42,383	\$42,383	\$42,383	\$42,383	\$42,383	\$42,383	\$42,383	\$42,387	\$127,149	
	\$2,702,850	\$0		\$226,237	\$226,237	\$226,237	\$226,237	\$226,237	\$226,237	\$226,237	\$226,237	\$226,237	\$226,237	\$226,237	\$226,244	\$676,711	

## **Appendix 1: SP Connect Certificate of Insurance (COI) Notifications**

E-mail notifications:

- All notification e-mails will go to the contacts listed in the Service Provider **Corporate Contact** panel of the Service Provider profile page (see section [4.3 Service Provider Page Overview](#)).
- The ETC associated with the site/program will be copied on e-mails.
- All notifications will show the regional mailbox in the From section.

### **COI 30 Day Notification**

**From:** [Region Mailbox]

**Subject:** 1<sup>st</sup> Notice for Certificate of Insurance Expiration - [SP Legal Name]

**To:** [SP Corporate Contact]

[SP Legal Name]

According to our records the Certificate of Insurance for your organization will expire on [CoI expiration date]. As per your agreement(s), please scan and e-mail a valid Certificate of Insurance to [regional e-mail] with a copy to your Employment and Training Consultant (ETC) on or before [CoI expiration date].

Future payments may not be processed after the Certificate of Insurance expiration date unless a new Certificate of Insurance is received.

If you have any questions, please contact your MTCU ETC.

Sincerely,

[Region Name] Region

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### COI 15 Day Notification

**From:** [Region Mailbox]

**Subject:** 2<sup>nd</sup> Notice for Certificate of Insurance Expiration - [SP Legal Name]

**To:** [SP Corporate Contact]

[SP Legal Name]

According to our records the Certificate of Insurance for your organization will expire on [Col expiration date]. As per your agreement(s), please scan and e-mail a valid Certificate of Insurance to [regional e-mail] with a copy to your Employment and Training Consultant (ETC) on or before [Col expiration date].

Future payments may not be processed after the Certificate of Insurance expiration date unless a new Certificate of Insurance is received.

Please note that if you have recently submitted your updated Certificate of Insurance, please disregard this notice.

If you have any questions, please contact your MTCU ETC.

Sincerely,

[Region Name] Region

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### COI Expired Notification

**From:** [Region Mailbox]

**Subject:** 3rd Notice for Certificate of Insurance Expiration - [SP Legal Name]

**To:** [SP Corporate Contact]

[SP Legal Name]

According to our records the Certificate of Insurance for your organization has expired. As per your agreement(s), please scan and e-mail a valid Certificate of Insurance to [regional e-mail] with a copy to your Employment and Training Consultant (ETC) on or before [Col expiration date].

Future payments may not be processed after the Certificate of Insurance expiration date unless a new Certificate of Insurance is received.

Please note that if you have recently submitted your updated Certificate of Insurance, please disregard this notice.

If you have any questions, please contact your MTCU ETC.

Sincerely,

[Region Name] Region