

Literacy and Basic Skills Performance Management System Training Questions and Answers

Literacy and Basic Skills Performance Management System training was provided to LBS service providers and support organizations in early 2013. The following document contains the parking lot questions and answers compiled from the 17 sessions conducted across the province.

For further information, please visit the Employment Ontario Partners' Gateway website (www.ontario.ca/eopg) or contact your ministry consultant.

Please note: Some answers have been revised as a result of system changes brought about by EOIS-CaMS Release 3.3

Information and Referral

1. What is a “formal referral”?

A formalized referral (a planned, supported and co-ordinated arrangement) is made by the LBS Program service provider on behalf of the learner to the other organization (employment/education/training/community services). It also recognizes formalized referrals made to the LBS Program service provider from another community organization on behalf of a client.

The ministry does not prescribe the nature of that documentation, it could be a completed referral form or it could also be a note to file indicating that a referral was made and that the learner received services from the other organization. Service providers may find that it is easier to capture information for input into the Employment Ontario Information System – Case Management System (EOIS-CaMS) if a referral form is completed. A formal referral includes an exchange of client / learner information.

2. Clarification needed on Information and Referral (is it in person only?)

Information and Referral is not restricted to individuals who physically enter a site. Face to face, email, or telephone inquiries may also be included as information and referral

activities. Upon request, service providers will need to produce records to validate the information and referral information provided to the ministry.

Service Providers have an obligation to promote the program within the community and provide information to learners, potential learners, clients, volunteers, other interested individuals and referring organizations.

Reference: (See link below page 30)

http://cscportal.edu.gov.on.ca/sites/ORUportal/Documents/lbs/2013-2014_LBS_SD_Guidelines.pdf

3. If a client is referred out to employment services funded through the Ontario Disability Support Program, what is the appropriate drop-down referral to use?

If the client/learner is referred to an Ontario Disability Support Program (ODSP), the referral should be indicated as Referred Out to ODSP.

4. “Referral In” does not fit with stated objectives. Where is Post-secondary captured?

Depending on the nature of the referral, an individual may be referred to a program provided through a post-secondary institution (i.e. Employment Service, Apprenticeship program). Alternatively, they may be accessing Educational/Academic Services. In the event that a specific service or program has not been identified, the referral may be captured under the Other – Structured/Formal Referral category.

5. In smaller communities we do not have formal referral processes. If the method of referral is a phone call, could that be used as a formal referral or do we need something in writing?

The LBS Service Plan “Referred In” field contains a wide variety of options including informal referrals which can be selected when the service plan is being created. Service providers can select “Informal Word of Mouth/Media Referral” to capture learners and clients who are referred to them through more informal channels.

As per the [LBS Guidelines](#), *a formalized referral (a planned supported and co-ordinated arrangement) is made by the LBS Program service provider on behalf of the client or learner to the other organization (employment/education/training/community services).* The program also recognizes formalized referrals made to the LBS Program from another service provider or from another community organization on behalf of a client. The ministry does not prescribe the specific documentation required: it could be, but is not limited to, a completed referral form or it could also be a note to file indicating that

a referral was made and that the learner received services from the other organization. Service providers may find that it is easier to capture information for input into EOIS-CaMS if a referral form is completed.

Service providers are welcome to refer to the [EOIS-CaMS LBS Data Dictionary](#) for more clarification.

Upon request, service providers will need to produce records to validate the information and referral information provided to the ministry.

Quarterly Status and Adjustment Report (QSAR)

6. Why is the space on the Quarterly Status and Adjustment Report (QSAR) form for explaining results and identifying strategies character-limited? Could you identify how many characters are available?

The QSAR represents the minimum opportunity for reporting and is designed to be descriptive, brief and succinct. Text boxes are typically set at 1,000 characters however this is subject to change.

Service providers may contact their MTCU consultant for further discussion if they feel the area provided in the QSAR is insufficient to allow for a fulsome explanation of their situation. MTCU may request service delivery sites to provide reports more frequently or in greater detail as needed.

If a service provider has run out of space and is in need of providing further information, they are encouraged to use bullet points and/or contact their Employment and Training Consultant.

7. One of the questions on the Quarterly Status and Adjustment Report (QSAR) is: Are your expenditures aligned with your business plan commitments. What does that really mean?

The Quarterly Status and Adjustment Report question actually is: Are your expenditures aligned with Schedule B of your agreement?

Alignment to Schedule B of the Literacy and Basic Skills agreement refers to ensuring the financial expenditures are on track for the quarter.

Please note: It is important for service providers to always be aware of the terms and conditions of their current LBS agreement. Schedules within the LBS agreements have been altered for the 2013-14 year.

Also, please note that questions within the QSAR have the potential to change quarterly. It is important to use the most recent documents posted on the Employment Ontario Partners' Gateway.

8. What do I tell my ministry consultant when they ask on my Quarterly Status and Adjustment Report what I am going to do to hit my targets, when I know that my contracted target is not realistic, or achievable?

Currently EOIS-CaMS is collecting data from service providers across the province that will inform future performance standards of the Literacy and Basic Skills program Performance Management Framework. At this time, it is critical that the data recorded into EOIS-CaMS is real and accurate.

The ministry is aware that there is a potential to see decreases in reported learners served for a variety of reasons. The LBS program is undergoing many change management initiatives including: EOIS-CaMS or the interim reporting solution for e-Channel service providers; the Ontario Adult Literacy Curriculum Framework; and LBS Performance Management System/Framework. All of these initiatives as well as other more efficient business processes will lead to service providers and the ministry having more reliable and valid data that will inform us about the realities in the field.

As we work towards determining baseline performance measures for Customer Service, Effectiveness and Efficiency, the ministry has made a conscious decision within the program to maintain the targets established in Phase 1 of the Performance Management Framework for the 2013-2014 business cycle. This includes maintaining learner targets established through previous year business planning processes. Once we have reliable data, combined with the valuable feedback we have received from service providers in the Q4 QSAR submissions, the ministry will be in a better position to adjust targets across any or all dimensions if required.

9. If we are supposed to celebrate success, why do you only want us to comment on what's not working in our Quarterly Status and Adjustment Report?

The Quarterly Status and Adjustment Report is designed to provide a consistent approach for reporting and providing feedback against performance commitments / deliverable achievements and budget management for all funded LBS service delivery sites.

Service providers are always encouraged to celebrate successes in order to identify best practices and to maintain high levels of performance within their organization. During business planning, service providers have the opportunity to identify an area of strength within the continuous improvement section.

10. Should Information and Referral (I&R) be included in our Quarterly Status and Adjustment Report (QSAR)?

The purpose of the Quarterly Status and Adjustment Report is to regularly report and provide feedback on performance commitments, deliverable achievements, and budget management for each funded LBS service delivery site. The QSAR represents the minimum opportunity for reporting and as such does not collect information on all aspects of service delivery.

Data related to Information and Referral is collected in the Employment Ontario Information System – Case Management System (EOIS-CaMS) and is reflected in Report 60A: LBS **All Data Information and Referral**, an operational report which provides service coordination data to support service providers in monitoring, managing and continuously improving service delivery. E-Channel service providers will be notified by their ministry consultant how to submit Information and Referral data separately. For more information on inputting Information and Referral (I&R) data into EOIS-CaMS please see Question 54.

Literacy and Basic Skills Performance Management System

11. The Literacy and Basic Skills program has always been accountable, why another change?

Over the past years the ministry has been working with Literacy and Basic Skills service providers and support organizations to change the way the LBS program is delivered with the implementation of the Ontario Adult Literacy Curriculum Framework (OALCF). April 1, 2012, marked the beginning of the transition to OALCF – a key milestone in our path to improving the way we help adults to achieve their goals of employment, apprenticeship, secondary school credit, postsecondary education and independence.

The Literacy and Basic Skills program is committed to modelling continuous improvement and is consistent with the Employment Ontario Performance Management System.

The LBS Program Performance Management System is a vital tool for both service providers and the ministry for service planning, delivery and management. It will assist service providers to be even more effective, customer-focused and efficient in achieving a high standard of overall service quality.

12. Service providers are asking, why they don't get credit for all the work they do? (i.e. assessment, marketing...)

It is important for LBS organizations to always be aware of the fact that the Literacy and Basic Skills program is a learner-centred, goal-directed, transition-oriented and results-based service. All the work done by service providers, including marketing and assessment, is reflected in the outcomes achieved by the clients and learners they serve. Section [2.2 of the Literacy and Basic Skills Program Service Delivery Guidelines](#) outlines the 5 services that all service providers are expected to provide including:

- Information and Referral;
- Assessment;
- Learner Plan Development;
- Training; and
- Follow-up.

Service providers may focus on preparing learners for different goal paths but each learner, regardless of the focus of the service provider's programming, receives the same five services.

The performance of the service provider and the overall quality of LBS is not measured by an exclusive focus on any one activity. Success is measured by a combination of who is served; the outcomes they achieve; customer satisfaction; and value for investment. This ensures that LBS learners and clients remain at the centre of the system.

13. Some service providers may not have learners in the suitability target groups identified in Phase 1 but have learners in the ones identified for Phase 2. Will they get penalized?

It is important that LBS service providers support learners who are most suitable for the program.

Suitability/Learner Profile is a measure of who is being served. It examines and quantifies identified learner barriers to achieving learning goals related to employment,

further education or training, and independence. This measure ensures that the *service providers* are providing services to clients who are most in need of LBS services. Suitability/Learner Profile in the LBS Performance Management System is measured with multiple suitability indicators, such as education level, time out of training, age, etc.

Suitability criteria include:

- Learning performance: characteristics of a learner which may affect learning performance, such as language, disability, education level.
- Motivation and study habits: characteristics of a learner which may result in motivational challenges or study habit issues, such as length of time away from formal education, history of interrupted education.
- Demographics: characteristics of a learner which have been identified as barriers to learning such as age, level of education attained, source of income support.

Service providers who demonstrate that they are serving learners who fit the above criteria, and who are supporting learners with suitability indicators currently identified in Phase 2 of the LBS Performance Management Framework will not be penalized for this activity. Service providers are encouraged to provide an explanation, during their ongoing consultation with their ministry consultant and also when submitting their Quarterly Status and Adjustment Report, to apprise the ministry of this situation.

14. LBS Guidelines – under suitability – identified barriers – is that the most suitable word to use to describe that?

As per the LBS Service Provider Guidelines, suitability criteria include:

- Learning performance: characteristics of a learner which may affect learning performance, such as, language, physical disability, education level.
- Motivation and study habits: characteristics of a learner which may result in motivational challenges or study habit issues, such as, length of time away from formal education, history of interrupted education.
- Demographics: characteristics of a learner which have been identified as barriers to learning such as age, level of education attained, source of income support.

While the demographic characteristics listed above may not always translate into a *barrier* for the individual, for the purposes of determining suitability for the LBS program, these criteria are considered appropriate to identify those individuals most suitable for the program.

15. Why is the choice of Aboriginal lumped in with choices around Disability?

Aboriginal self-identification by learners is a suitability indicator for the Literacy and Basic Skills program. See question 14, above.

16. When are the learner targets going to be equalized?

Currently the performance targets are based on previous years' targets. With the implementation of EIOS-CaMS, the ministry has started collecting data which will be used in the future to ensure performance targets are realistic.

Follow Up

17. If a client is exited and subsequently returns for services later resulting in a new service plan, is the service provider required to complete the follow-ups on the first learning plan?

As per the LBS Service Provider Guidelines, section 3.8 Follow-up: LBS service providers contact learners at exit and at three, six and twelve months after they leave the LBS Program in order to document their outcomes. This delivery service helps demonstrate the value and effectiveness of the four other delivery services in meeting the literacy needs of learners.

LBS service providers must:

- follow up with learners at three, six and twelve months after they leave the program to document their current status;
- ensure that information collection and recording makes follow-up convenient and effective;
- evaluate the effectiveness of the training activities, including learner feedback;
- establish and maintain a process for receiving ongoing feedback and information from other *service providers* in the community, from employers (where appropriate), and from learners

Ontario Adult Literacy Curriculum Framework (OALCF)

18. What if the learner does not complete the culminating task?

If the learner has completed the required milestones and learning activities, but not the culminating task, the service provider will not be able to report that the learner has successfully completed the requirements of the goal path. The culminating task is one of 3 performance indicators for the measure "Completion of Goal Path". Completion of milestones, however, will still count towards the learner progress measure. Completing the learning activities will be counted as completion of one performance indicator for Completion of Goal Path.

19. Will there be culminating tasks created that would be suitable for learners transitioning from community based programs to post- secondary LBS or school board LBS programs?

No. LBS in itself is not a goal path.

20. Can clarification be provided around “computer training”? It is not clear why LBS service providers cannot provide computer training because as per page 39 of the LBS guidelines it sounds like it would be allowable.

Computer training, including training on specific software applications, is permitted for learners who are eligible for the LBS program if these skills are necessary for them to transition successfully to their goals.

21. What if there are no jobs, if the learner was on the goal path of employment?

To support the learner through Service Coordination, it may be appropriate for the service provider to refer the individual to other Employment Ontario programs and services or other community services in order to address the learner’s barriers to learning or employment. For example, the learner may benefit from a referral to an Employment Ontario Employment Service (ES) service provider who can provide them with further information about options including, but not limited to job search; job matching, placement and incentives; job and training retention support; information and referral services; and client service planning and coordination. Learners may also benefit from referrals to programs such as Second Career or the Ontario Self-Employment Benefit program.

Risk Assessment

22. Can Service Providers have a copy of the risk assessment?

Each completed risk assessment is service provider-specific and presents an opportunity for ministry staff to build stronger relationships with service providers and for service providers to build capacity.

In fall 2012, a memo was issued to service providers regarding the application of the risk assessment methodology to the LBS Program. A link to this memo has been provided below:

http://www.tcu.gov.on.ca/eng/eopg/publications/eo_risk_management_implementation.pdf

The risk assessment methodology is an internal tool used by the ministry to gather information that assists the ministry in identifying risks that could impede an

organization from achieving its contractual obligations under its transfer payment agreement with the ministry. The information collected by the tool is shared with service providers through the letters issued following the assessment. These letters and subsequent conversations with ministry consultants highlight areas of weakness requiring attention and opportunities for capacity building.

General

23. Some service providers have noticed that the messaging they are receiving is not consistent. Is there a way to ensure that service providers receive the same message?

The [Employment Ontario Partners Gateway](#) (EOPG) provides support to organizations delivering Employment Ontario projects or services, including those delivering the Literacy and Basic Skills program. The site provides a wealth of tools and materials to support LBS organizations including program guidelines, audit and accountability requirements, etc.

Service providers can sign up for a Really Simple Syndication (RSS) feed to easily manage online information by automatically bringing new content directly to subscribers. When a new document is posted on the EOPG, the subscribers RSS feed is updated automatically.

Service providers should always consult posted materials, as well as their LBS agreement, for clarification in order to ensure that they have the most current information.

24. Will Francophone LBS service providers have a “French support organization” like the Anglophone LBS service providers have?

French service providers are currently served by two support organizations: la Coalition ontarienne de formation des adultes (COFA) and le centre franco-ontarien des ressources en alphabétisation (Centre FORA).

COFA is a stream organization mandated to help stream-specific service providers in all sectors through information sharing, provincial partnering, and by providing practitioner training that addresses delivery issues around language and culture.

Centre FOR A is a service organization mandated to provide publishing services and resource development for the Francophone stream.

25. The wording used in French does not have the same meaning in English. Is there a way to ensure consistency (i.e. client versus learner versus customers)

MTCU is aware of some inconsistencies and is working with translation services to ensure there is consistency in future.

Employment Ontario Information System – Case Management System (EOIS-CaMS)

26. How can learners access training supports sooner, rather than having to wait until they have become an active learner in the Employment Ontario Information System – Case Management System?

The learner must complete the LBS Participant Registration Form including acceptance of the notice of collection and consent before service plan activity occurs. There is an expectation that EOIS-CaMS is updated in real-time to reflect learners currently registered in the program.

27. Will we always have to get a learner signature to activate their service plan?

In the system, in order to bring a service plan into “active” status, the learner must accept the learner plan. An actual signature is not required to activate the service plan as long as there is verbal agreement with the learner.

Amendments to the service plan can be verbal in nature as long as they are articulated in the service plan with evidence in the learner’s file.

28. Can you edit a closed service plan? If so, do the changes show up in your next DSQR? Can you only edit closed service plans during the month in which that plan was closed?

Once a service plan is closed, its main content cannot be edited. The only part of the service plan that can be updated after closure is the closure details information. The one exception is the Closure Reason cannot be changed once the service plan has been closed with a reason of “Opened in Error.” The information updated in the Closure Details will then be reflected in the next run of the DSQR.

http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams_day1/userguide/eois_cams_ch8_s_p_management_lbs.pdf

29. Does MTCU roll up and track the estimated time it will take a learner to complete their plan?

This information is captured in the LBS Case Activity Report 61. The program duration is tracked in weeks based on the start and end dates of the service plan. There is no roll-up/average of this number currently in any report.

Reference:

http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams_reporting/eois-cams_reporting_lbs_case_activity.pdf

30. Can regional networks have access to provincial data? Can this be sorted by sector and stream support organizations as well?

The ministry is working to develop aggregate data reports for regional networks and support organizations.

31. Learners served on Detailed Service Quality Report – if learners have a competency type sub goal and are active they will show on the DSQR. What happens if that competency is either not completed or cancelled and the service provider then closes the service plan? Will that learner still show up as a learner served? Does the competency have to be completed and attained in order for it to be counted as a learner when closed?

Currently, the LBS Detailed Service Quality - Report 64 will pull in **active or closed service plans** with defined start and end dates that contain one or more of the following sub-goals from the “Competency” sub-goal type:

- a. Find and Use Information
- b. Communicate Ideas and Information
- c. Understand and Use Numbers
- d. Use Digital Technology
- e. Manage Learning
- f. Engage with Others

The data sources for *Learners Served* include both new and carry over clients. New and carry over clients are pulled from the service plan home page, case details panel, start date field.

Competency type sub goals must have a status of “in progress” or “completed” in order to be filtered into the DSQR. Sub-goals and plan items with an outcome of cancelled will not be included in the report. Service plans that have a closure reason of “Opened in error” are also excluded from the report. A service plan can only be closed when its status is “Active” and all plan items and sub-goals have outcomes saved, or at any time as long as the Closure reason is “Opened in error” or the plan summary is “Cancelled” or “rejected”. A service plan is usually closed once all activities have been completed, but it can be closed at any time during its delivery.

Reference:

(See link below page 5)

http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams_reporting/eois-cams_reporting_lbs_dsqr.pdf

(See link below Page 37 to 39)

http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams_day1/userguide/eois_cams_ch8_sp_management_lbs.pdf

32. Why do so few learners on the provincial Detailed Service Quality Report (DSQR) have less than grade 12?

Information reported in the Detailed Service Quality Report reflects data input by service providers into EOIS-CaMS. Service providers who feel there are discrepancies between their own business intelligence and the system are encouraged to review administration and data entry processes within their organization. It is important that the data reported in EOIS-CaMS reflects the activities currently occurring within the service delivery network.

33. Service Coordination - if referral to other programs and services sub goal is chosen does the competency sub goal also have to be completed in order for the referral to count on the Detailed Service Quality Report?

The data source for Referred out –Registered in Employment Service is pulled from the “Status” field of plan items under the sub-goal “Referral to Other Programs and Services”. The service plan must be closed and have at least one competency. The plan item must have a status of “In progress” or “Completed”.

Reference:

(See link below pages 11 to 14)

http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams_reporting/eois-cams_reporting_lbs_dsq.pdf

(See link below pages 37 to 40)

http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams_day1/userguide/eois_cams_ch8_sp_management_lbs.pdf

34. Service Coordination - Referred In on Detailed Service Quality Report – why don't LBS service provider referrals count in 'Referred In' but they count as 'referred out'?

Service coordination tracks how well a service provider works within the Employment Ontario delivery system and the community. A learner has to be formally referred, through a recognized referral process, not word of mouth, to the LBS program service provider from another EO service provider or other community organizations and services. Only one referral is counted per service plan, regardless of whether or not there are multiple referrals in the service plan. For Referred out, the learner has to confirm that they are registered, as a result of the LBS program service provider, in an education program that will provide them with a recognized high school or high school equivalency certification.

Reference: (See link below pages 9 to 13)

http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams_reporting/eois-cams_reporting_lbs_dsq.pdf

35. We understand that you need to have at least one competency in a service plan. Do you need to have a milestone completed in a service plan in order for the service plan to count as a learner served (efficiency) on the Detailed Service Quality Report?

For in-person LBS service delivery, a milestone does not have to be completed for a service plan to count as a learner served. The DSQR Report 64 will pull in service plans that contain a 'Competency' sub-goal (excluding Learning Activities) and a status of either 'Completed' or 'In Progress.' With Release 3.3, service plans with a 'Competency' sub-goal with the status of '**Not Started**' or an outcome of '**Cancelled**' will not be counted in the report.

* e-Channel service delivery organizations should consult with the interim reporting solution guidelines for further information regarding learners served criteria.

36. Are learner service plans that appear inactive included in the learners served count in the Detailed Service Quality Report?

The “inactive” state only applies to Report 20 Inactive Cases and Report 61 – LBS Case Activity Report and is not reflected in the system under the service plan’s status; therefore the DSQR will not be affected. Cases will be reflected as ‘inactive’ on reports 20 and 61 if they have not had any activities recorded in CaMS within the last 60 days.

The DSQR includes the progress and learners served from active service plans.

Reference: (see link below page 5)

http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams_reporting/eois-cams_reporting_lbs_dsqr.pdf

37. Inactive clients- What are the implications if a service provider has a lot of inactive clients?

Inactive clients are not counted as learners and therefore are not reflected in the EIOS-CaMS Detailed Service Quality Report. **Please refer to question 36.**

38. Regarding EOIS-CaMS Report #20: Are inactive service plans counts cumulative?

Report 20 filters service plans which have been “inactive” from the last 60 days or more based on report run date. This report is designed to be opened, viewed and printed in excel. It will be run weekly with a total of 56 reports being retained.

39. If a new participant can complete the registration form is it wise for the service provider to immediately input milestone 33? That would then take care of having to input a milestone.

LBS service providers work with learners to develop a learner plan to address skills that learners do not have at the required level to achieve their goals when commencing the program. If a learner is proficient at a skill when they start the program (i.e. completing a form), this is not something that should be identified in the learner plan.

In this example, successful completion of the participant registration form would not constitute a milestone as the individual already had this skill when entering the LBS program.

40. Why is suitability based on closed learners only?

Suitability is a measure of who is being served. It examines and quantifies identified client barriers in learning. This measure ensures LBS service providers are providing services to the clients who can most benefit from the LBS program. Service providers must serve clients who, on average, are experiencing at least 29% of identified suitability indicators for Phase 1 of Suitability. For the purpose of the Detailed Service Quality Report, suitability indicators are pulled from service plans that are closed and have at least one competency.

Reference:

(See link below, page 14 & 15)

http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams_reporting/eois-cams_reporting_lbs_dsq.pdf

41. Why is e-Channel referred in/out not referenced in Service Coordination?

E-Channel is an alternative mode of delivering LBS. As such this would be reflected as an EO – Literacy and Basic Skills service provider referral.

42. On the Exit form, one outcome is that the learner was referred out at exit. Where in EOIS-CaMS would a user input referral at exit information?

The *LBS Exit and Follow Up* form has Outcome options such as “In Training – Second Career.” If this outcome was the result of a referral (this may not be the case), the referral would have been captured in a plan item under the Referral Out to Other Community Resources or Referral to Other Programs and Services sub-goals. In the example of Second Career, the sub-goal would be Referral to Other Programs and Services and the plan item would be “EO - Employment Service Provider.” For the Expected Outcome of the plan item, “Referred at Exit” would have been selected.

43. The LBS Case Activity –Report 61 is very difficult to manage and manipulate to read. Can it be reformatted?

The LBS Case Activity – Report 61 is published in Excel to accommodate the various needs of the LBS network. Publishing in this format allows users to adjust the reports to reflect their unique preferences. Within Excel, users have the ability to adjust font size, column widths, and are able to sort and manipulate data. We encourage LBS agencies to become familiar with the LBS Case Activity Report 61 User Guide, available at

For additional information see:

http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams_reporting/eois-cams_reporting_lbs_case_activity.pdf

44. Employment Service has report 15B. Could Literacy and Basic Skills have same report?

The LBS All Data – Service Plan/Profile– Report 60B was released with Release 3.2 of EOIS Reports on April 15, 2013. This report contains the same fields as ES Report 15B, but with additional fields that relate to LBS.

45. Can a Service Provider request access to the “flat files”?

Data files have been available to Service Providers since Release 3.0 (April 2012). If you wish to receive data files on the Service Provider Reporting Website, you must select “utilizing data file” on your service delivery site homepage in CaMS. Currently data files are being utilized by a number of Service Provider organizations, and have experienced number of updates for Release 3.2.

For additional information see:

http://www.tcu.gov.on.ca/eng/eopg/publications/2013_2_cams_bulletin.pdf

46. On the LBS Exit and Follow-up form, a learner has to rate the service they have received. Is there a way to add what 1-5 means as a scale? Some clients may think 1 is good and 5 is bad.

The *LBS Exit and Follow-up* form was created to assist LBS service providers in supporting exit and follow-up activities. The learner should not be completing this form. The service provider should explain the scoring scale to the learner at exit and during the follow-up(s).

47. What further training will TCU provide to ensure data integrity? Will there be training available to confirm definitions of fields within EOIS-CaMS?

The ministry recognizes the importance of providing the appropriate supports to ensure the proper administration of EO programs. In the case of LBS and EOIS-CaMS, the ministry has delivered system training and has invested in LBS Performance Management System training. To supplement these efforts, the ministry also makes a myriad of system resources available to the LBS network such as online training modules as well as detailed user guides. Service providers are responsible for ensuring their staff is familiar with these resources.

The ministry will continue to assess capacity building requirements and will plan accordingly.

48. Will a learner who exits prior to completing all the plan items under a competency sub goal be removed from the Learners Served total? Does it make a difference if competencies are entered as separate sub-goals, rather than as multiple plan items of a single sub-goal?

A service plan with an Active/Closed status and at least one **completed** competency type sub-goal associated with their plan (not including Learning Activities) will be counted in the Learners Served totals within Report 64. **Sub-goals and plan items with an outcome of cancelled will not be included in the DSQR.**

For additional information see Detailed Service Quality Report User guide:
http://www.tcu.gov.on.ca/eng/eopg/eotransformation/eois-cams_guides.html

49. Can a closed file be opened within 6 days to change some of the data?

Once a file is closed, it cannot be reopened for any reason. This is the way the system has been designed, and changing this would be difficult without affecting other areas of the system and reports. We encourage service providers to stay aware of this fact, and only close service plans when they are sure that it is absolutely appropriate to do so.

50. Is there a definition in the data dictionary for the suitability indicator ‘time out of training’?

Currently there is a definition in the data dictionary for the suitability indicator ‘time out of training’. The definition states that “Suitability / Learner Profile Indicator (Phase II) - More than 6 years out of training”. As this suitability indicator will not come into effect

until Phase two, currently it will not affect your numbers within the DSQR – Report 64. For more information, please contact your ministry consultant.

For additional information see:

http://www.tcu.gov.on.ca/eng/eopg/publications/eois_cams_lbs_data_dictionary.pdf

51. Should learner plans (or the Plan Summary page in EOIS-CaMS), be printed when new milestones are added, or can we just add (handwrite) the new milestones and learning activities onto the learners' learner plans?

How the learner's consent to changes to the learner plan is captured is at the service provider's discretion. This could involve printing an updated version of the document or handwriting notes on the existing document. Please note that LBS service providers should discuss the expectations concerning physical documentation with their ministry consultant.

In Release 3.3 of EOIS-CaMS in Fall 2013, the ministry plans to introduce the Enhance Learner Plan (ELP), which will generate an interactive PDF document with data drawn from a learner's service plan. This document will be editable and the information can be uploaded and transferred to the learner's record in EOIS-CaMS. This should eliminate many issues surrounding discrepancies between the learner plan and EOIS-CaMS.

52. Is there a way to just print the updates to the service plan instead of re-printing the whole thing?

No, currently this functionality does not exist in EOIS-CaMS.

53. Is there a way to document a learner's 'time out' away from learning if they leave for two or three months – so that it doesn't look as though they are attending and just not making progress?

Currently in EOIS-CaMS there is the Notes page associated with the LBS service plan where service providers can add such notes as "time out" of learning. This will not change the fact that after 60 days of inactivity, the service plan will begin to display on the Service Provider Inactive Cases – Report 20, but it gives service providers a way to capture this information in the system.

Service providers should discuss documentation expectations of the learner's file with their ministry consultant.

54. Where do we put Information and Referral (I&R) data into EOIS-CaMS? Some of us have the information but we don't know where to put it into CaMS.

Information and Referral (I&R) data is inputted in the Services section of the Service Delivery Site home page. Further information on the Information and Referral section of the Service Providers Service Delivery Site can be accessed in Chapter 5 of the EOIS-CaMS User Guide.

For additional information see:

http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams_day1/userguide/eois_cams_ch5_s_p_info_management.pdf

See Pages 89-90 of the LBS Data Dictionary:

http://www.tcu.gov.on.ca/eng/eopg/publications/eois_cams_lbs_data_dictionary.pdf

55. If a learner returns to LBS after their service plan has been closed, can you cancel the follow-ups created in EOIS-CaMS as the learner is once again an active learner with a new service plan?

No, currently this functionality does not exist in EOIS-CaMS.

56. Without successfully completing a milestone are they considered a learner served? If not counted as a learner served, how will that information flow up to MTCU?

A service plan with an Active/Closed status and at least one **completed** competency type sub-goal associated with the plan (not including Learning Activities) will be counted in the Learners Served totals within the Detailed Service Quality - Report 64. **Sub-goals and plan items with an outcome of cancelled will not be included in the DSQR.**

For more information see question 35.

For additional information see:

http://www.tcu.gov.on.ca/eng/eopg/publications/eois_cams_faq.pdf

http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams_reporting/eois-cams_reporting_lbs_dsqr.pdf

57. Can a service provider change the learner satisfaction result on a closed service plan?

Yes, they can. Almost all aspects of the closure details of a service plan can be modified at any point after closure. The one exception is the closure reason cannot be changed once the service plan has been closed with a reason of “Open in Error”.

For additional information see:

http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams_day1/userguide/eois_cams_ch8_s_p_management_lbs.pdf

http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams_reporting/eois-cams_reporting_lbs_dsq.pdf

58. How are learners and clients counted in the reports - unique persons or by service plans?

This answer will focus on the LBS Detailed Service Quality Report - Report 64. Once the LBS Service Plan comes into an Active status, it will be counted in the Learners Served section of the DSQR - Report 64. This section of the report records individual learners (not individual service plans).

For additional information see:

http://www.tcu.gov.on.ca/eng/eopg/publications/eois_cams_faq.pdf

http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams_reporting/eois-cams_reporting_lbs_dsq.pdf

59. We are about to close the service plan and the learner has completed 2 milestones but did not complete the 3rd milestone as they changed their mind. How would this incomplete milestone affect our results in CaMS?

Information from the service plan is filtered into performance reports based on the status of the sub goal. Therefore, if a sub goal has two completed milestones this information will be filtered into the report, affecting the Completions section. If a sub goal or plan item has an outcome of cancelled it will not be included in the reports.

As long as there is a status for that milestone/plan item, this should not affect the closure of the service plan.

For additional information see:

http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams_day1/userguide/eois_cams_ch8_s_p_management_lbs.pdf

60. Why doesn't Report 61 do some automatic sums, for example why do they have to manually count all the OW/ODSP clients?

Within the Suitability section of the Detailed Service Quality Report -Report 64, the sum of OW/ODSP clients for a service delivery site are displayed in the numerator column. This section of the report displays the sum of the learners who are over the age of 45 and under the age of 64. These are the two factors which make up suitability for Phase 1 of the Performance Management System.

For additional information see:

http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams_reporting/eois-cams_reporting_lbs_dsq.pdf

61. Does data entry tool match up to EOIS-CaMS?

Yes, the data entry tool matches up to EOIS-CaMS.

62. What happens when a user has not accessed EOIS-CaMS in 60 days?

A user will be highlighted in the User Management Report (Report 42) and an inactive service plan will display in the Service Provider Inactive Cases Report (Report 20). Service delivery site managers are encouraged to review Report 42 (and Report 20) on a regular basis as part of their responsibilities including managing their EOIS-CaMS license and user account allocations.

The ministry monitors inactive users, and if an organization has a large number of users who are inactive, the ministry may revisit and adjust your system license and user account allocation.

For additional information see:

- i. http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams_reporting/eois-cams_reporting_sp_user_mgt_report.pdf
- ii. http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams_reporting/eois-cams_reporting_inactive.pdf

63. On the Service Plan page, there is a question “Has the learner completed all goal path required learning activities?” How is this determined/defined?

This is determined by the practitioner, using their judgement and their experiences with the learner. This should be a collaborative activity with the learner throughout their training.

64. Are service providers *expected* to enter the following pieces of information, or are they completely optional? Are there any incentives for them to provide this information?

- a. Learning activity sub-goals
- b. Training supports

Entering all applicable information helps to ensure the integrity of the data collected in EOIS-CaMS and helps the ministry identify all relevant activities learners are engaged in. While these components of the service plan do not affect SQS values the data collected is used to inform future policy and program development and, as such, service providers are expected to enter all information collected from learners. Please note, if the service plan only has Learning Activities as a sub-goal, (as opposed to including at least one competency) the service plan will not be counted in reports. If service providers have any additional questions they can contact their ministry consultant.

65. Do “referrals out to other community resources” include referrals to other services in the service provider’s organization, or must they be external?

No, they do not need to be ‘external’ to the organization. The system includes a drop down list of possible referral destinations, and if the service provider’s organization offers a service on the list then the referral can be captured. These referrals must be planned, supported and coordinated arrangements. Again, it’s important that service providers have discussions with their ministry consultant if there is any ambiguity.

66. Page 50 of chapter 8B of the EOIS- CaMS User Guide indicates that the outcomes for sub-goals determine if the desired outcome of the service plan has been obtained. What are the possible outcomes for the service plan, and how are these calculated based on sub-goal outcomes?

The service plan, as such does not have an outcome, but we do capture the reason for the plan being closed. At the plan item, and sub-goal levels there are three possible outcomes - Attained, Not Attained and Cancelled. When closing the service plan reasons include:

The screenshot shows a dropdown menu for the 'Reason' field. The menu is open, displaying a list of reasons for closing a service plan. The reasons include:

- Both employed and in education
- Both employed and in training
- Employed Apprenticeship
- Employed Full-Time
- Employed Part-Time
- Employed in a more suitable job
- Employed in a prof occ/trade
- Employed in area of training/choice
- In education - OSSD or equivalent
- In education - academic upgrading
- In education - other
- In education - postsecondary
- In training - Apprenticeship
- In training - EO Literacy
- In training - ESL/FSL
- In training - Federal
- In training - MCI Bridge projects
- In training - Second Career
- In training - other EO training initiatives
- In training - other occupational skills training
- Independent
- Self-Employed
- Unable to work
- Unemployed
- Unknown
- Volunteer

Service providers are expected to use their expertise, in consultation with the learner, to determine whether Learner has achieved their goal path. In most cases, this will be explicitly clear.

| Details | |
|---|---|
| * Reason: | <div style="border: 1px solid gray; padding: 5px;"> <ul style="list-style-type: none"> Change of Goal Client Deceased Client Moved Client Started a Business Completion Found Work Related to Goal Found Work Unrelated to Goal Left Labour Force Opened In Error Other Personal Reasons Program Unsuitable Training Provider Closed Unable to Contact Client Unsatisfactory Training Provider Service Provider Closed </div> |
| * Outcome: | Reason |
| * Customer | |
| Assessment | |
| * Exit Learner Gains Score | Date of Exit Le |
| * Has the goal path specific Culminating Task been successfully completed | * Has the learner completed the goal path |
| Self Reported Learner Weekly Time Commitment | Cancel |