

BEGINNER'S GUIDE

For Program Coordinators of Literacy Organizations



CAMBRIAN
COLLEGE



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Beginner's Guide for Program Coordinators of Literacy Organizations in Ontario is intended to ease the transition process for the newly hired program coordinator/manager of the smaller Literacy and Basic Skills organization.

It is by no means an exhaustive guide of the extensive resources available, but rather it is a starting point.

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Introduction

This manual is designed to help the new Literacy and Basic Skills (LBS) program coordinator adjust to the adult literacy delivery environment in Ontario. Efforts have been made to keep the terminology and the description of processes as simple as possible and to focus on what will help new program coordinators get started in their positions and experience success.

The requirements of the program coordinator position will not be the same for every organization. For example, some program coordinators are not expected to maintain the financial records, but in other organizations this may be a requirement. These expectations are determined as part of the hiring process and will be detailed in the job description.

The *Beginner's Guide* provides information about the most important aspects of the program coordinator's job that are common to all community-based LBS organizations and explains the mentoring function of the regional literacy network. The manual (guide) also outlines the LBS service provider's obligations to the funder - the Ontario Ministry of Training Colleges and Universities (MTCU) - including financial obligations and recommendations for financial management to ensure compliance and to promote success.

As you read this *Beginner's Guide*, you will see frequent references to MTCU and to Employment Ontario or EO. **Note that Employment Ontario is part of MTCU's Employment and Training Division.** LBS is one of several government-funded programs within Employment Ontario. You can read more information about EO later in this manual.

Although the demands on a new program coordinator are numerous, this manual will focus on key tasks and responsibilities and will point to the many excellent resources available to LBS administrators and practitioners. The regional literacy network staff is an important source of information and can introduce the new program coordinator to key tools and resources. New program coordinators are encouraged to request as much assistance from the literacy network staff as is needed. Recognize the strengths you bring to the job that will help you to meet the expectations and identify any challenges you may have that require you to obtain additional training or support.

The *Beginner's Guide* complements the *Succession Planning Toolkit*, developed by Literacy Link South Central in 2009, <http://www.llsc.on.ca/node/108>, which focuses on the broader succession planning process. The resources listed in this manual are not exhaustive, but they are meant to be reflective of common areas of interest for new program coordinators while also highlighting important elements of LBS program delivery and management. The work of listing all the available resources pertinent to Ontario was done in 2001 in an excellent volume entitled *New to Literacy in Ontario? What Literacy Staff Need to Know*, by Anne Semple and published by Literacy Link South Central (Contact Literacy Link South Central <http://llsc.on.ca/> for a copy of this document).

Throughout this Guide, you will see frequent references and links to the Employment Ontario Partners' Gateway (EOPG) web site. **EOPG is the official web site for MTCU's communications with not only LBS programs but with all organizations under the Employment Ontario umbrella.** Organizations are responsible for visiting the EOPG website on a daily basis, as all LBS-related information will be posted there. You can also subscribe to an RSS feed to ensure that new postings are delivered automatically to your inbox.

Below is the link to the main EOPG page which contains new postings.

<http://www.tcu.gov.on.ca/eng/eopg/newpostings/>.

This link is to the LBS Program page on EOPG:

<http://www.tcu.gov.on.ca/eng/eopg/programs/lbs.html>

In addition to information posted on EOPG, the *LBS Service Provider Guidelines* are a must-read document and one that you will refer to frequently to familiarize yourself with **MTCU's expectations** and your responsibilities for all aspects of program delivery and management. (See also the section later in this manual for more detailed information about the LBS Guidelines.) The 2015-16 LBS Guidelines can be found at

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

Simple, yes? It is simple, if you keep in mind that you have access to many sources of support, such as the MTCU Employment and Training Consultant (ETC) assigned to your organization, the regional network staff, provincial literacy organizations, and your Board of Directors. Your work is recognized by Employment Ontario as providing the foundational skills required by Ontario citizens to survive **and thrive in today's employment environment, an environment which is constantly shifting and changing.**

We hope that this *Beginner's Guide* helps you to contribute to this important work by providing you with practical tools and resources that can be used immediately.

You will learn about:

- ✓ The language of literacy;
- ✓ The role of the support organizations;
- ✓ The role of literacy services planning;
- ✓ Key MTCU processes, documents, and supports including the Ontario Adult Literacy Curriculum Framework (OALCF), the *LBS Service Provider Guidelines*, the annual LBS business planning cycle, the performance management system, and required data tracking and reporting;
- ✓ Available literacy resources.

Section 1

The Literacy Landscape

Program Coordinator/Manager

No matter how well-organized the previous program coordinator left your literacy organization, you are now in charge and there is still a great deal for you to learn. The principles of good management, which apply to the literacy learner starting out on his or her learning journey, equally apply to a new program coordinator. **It's a process of identifying a goal, conducting a self-assessment**, identifying the elements of your learning plan, accessing the training and appropriate tools and materials, and evaluating if you have achieved what you need to do to be successful in this position.

One of the first things you need to do is contact the MTCU Employment and Training Consultant (ETC) assigned to your organization. Introduce yourself and set up an appointment to meet him or her as soon as possible.

Organizations such as Community Literacy of Ontario have developed excellent on-line training programs accessible to literacy practitioners at <http://library.copian.ca/>. These can be utilized by the new program coordinator and other new staff and/or volunteers.

Literacy practitioners help learners to achieve their goals. Similarly, regional literacy networks and other support organizations and literacy practitioners will help the new program coordinator achieve **his or her program goals. If you can't find what you need – just ask.** There are supports in place to help you succeed and your regional network staff is connected to numerous resources.

As mentioned in the "Introduction" to this guide, all LBS information from MTCU such as business plan guidelines, templates, mandatory reporting forms, bulletins, call for proposals, OALCF information (which is discussed later in this document), audit and accountability guidelines and so on, **are posted to the EO partner's gateway website indicated above.** This web site is critical to the functioning of your LBS organization and should be one of your first priorities in becoming oriented in your new position. Once you become familiar with the web site, **you will want to check the "New Postings"** page of the site on a daily basis, as updates about all Employment Ontario programming are continuously posted at <http://www.tcu.gov.on.ca/eng/eopg/newpostings/> Information specific to LBS is posted at <http://www.tcu.gov.on.ca/eng/eopg/programs/lbs.html>

Mentoring and Coaching

Mentoring and coaching are also options which you can utilize through your regional literacy network.

Mentoring

Mentoring follows an open process, which evolves as the need arises. It is a reciprocal relationship which **“there is no universally accepted definition of: however, most people understand mentoring as a relationship between two individuals, in which a wiser, more experienced person teaches a less knowledgeable individual.”**¹

Mentors can be role models and facilitators. The mentor will be able to introduce you to new sources of information and help you explore your challenges and the organizations challenges. A mentor will help you build your own insights, and assist you in building your self-confidence.

Your regional literacy network staff can readily connect you with other literacy program coordinators or practitioners in your region who have proven experience in particular aspects of literacy delivery and administration. If you ask your regional literacy network staff to arrange some time with a mentor, you will have the benefit of connecting with someone who has both the listening skills and expertise to address what you need.

Coaching

Coaching normally focuses on achieving performance goals within a limited time period. For example, if the goal is to assist you to improve your competence in specific tasks, the coaching involves passing on specific knowledge to assist in that endeavour.

“Coaching, often confused with mentoring, is a process that occurs when a person views and critiques another at work and offers ways to improve his or her practice. Although a mentor might seem to act as a coach there is an important distinguishing feature: coaching is an activity between peers who have equal competencies, while mentoring involves an imbalance of competencies, with the mentor being the more experienced person.”²

¹ (Galvez-Hjornevik 1986; Stevens 1998; Murphy 1995) 2010 The Alberta Teachers' Association

² (Loucks-Horsley 1998, 25) 2010 The Alberta Teachers' Association

The rules of coaching include the following:

1. Determining the goal - clearly defining the expectations and explaining why they are necessary or desirable.
2. Carefully examining current performance - the coach will observe how you are doing things now, what you already know how to do, your interest and confidence levels and any barriers limiting your performance.
3. Coaching you - make a choice about where you need help, give advice, point you **towards other "good" performers, and help you invent better tools to improve** performance or remove barriers.
4. Assessing results - this involves looking at the outcome in relation to the goals.

The benefits of coaching and mentoring to you may include:

- Acquiring the valuable skills and knowledge you need in a less formalized way, without having to go through the trial-and-error process.
- Having a model which can be referred to in person, providing for consistency in development.
- Alleviating the organization of having to purchase or implement expensive formal training programs.

Utilizing internal coaching/mentoring reaps superior development benefits for not only the new program coordinator but the entire organization as well.

It is up to you to decide which method best suits your needs. Contact your regional network to ask for their assistance in connecting you with a mentor and/or coach.

You can find more information on mentoring and coaching at the end of this guide.

Terms and Acronyms

“Please complete your LSPC documents and forward to TCU and the Network ED. FYI the CLO and LLO are cooperatively introducing ESL/ESOL instruction. In addition to preparing learners for employment or for ACE, your learners may access ILC through TVO online, and GED training is available online, so mention that to your stakeholders, i.e. OW. New materials have also been posted on NALD. Don’t forget to access EOPG for the latest information on EO directives.”

Did that make you feel uncomfortable? Did you understand the content of this paragraph? Although the use of acronyms is common in any field of specialization, it is not good practice if you are sincere in wanting to convey ideas and information. Acronyms are intended to speed up the process of communication, but they serve as a barrier to those new to or unfamiliar with the topic. It is important to remember to only use acronyms with those you are certain will understand you. It is inappropriate to use them with external stakeholders, with learners, or with anyone who may not be knowledgeable about their meaning. As a new coordinator you will, however, encounter documents and people that make use of these acronyms.

You can find a list of commonly-used acronyms at the end of this guide.

Getting to Know Your Support Organizations

What is a Support Organization?

Support organizations are funded by MTCU to provide service development support to service providers. Support organizations are similar in that they broadly provide support to service providers to ensure that the LBS Program is:

- Coordinated and promoted in communities as a system of service provision that avoids duplication;
- Of the highest quality;
- Responsive to emerging needs (identified by the community and government);
- Integrated into the broader Ministry of Education (EDU), Ministry of Citizenship and Immigration (MCI) and MTCU: Employment Ontario (EO) programs.

Support organizations however have distinct roles and responsibilities within these broader common objectives and are further categorized as follows:

- Regional networks;
- Stream organizations;
- Sector organizations;
- Service organizations.

“Support organizations play a critical role in identifying for service providers the changing needs and requirements for successful learner transition and contribute to any actions that must be taken to increase learner success (e.g., development of resources, service provider training, linkages to other supports and services).”³

The LBS Support Organization Guidelines (2015) can be found here:

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

³ LBS Support Organization Guidelines June 2015

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

What is a LSP? Literacy Services Plan

Regional literacy networks are funded by MTCU to facilitate a Literacy Services Planning and Coordination (LSPC) process within a community or region. Networks help LBS organizations gather, interpret and analyse relevant information for the purpose of determining what literacy services should be offered in a specific community. LBS service providers are contracted and funded by MTCU **based on their delivery “sector” and cultural “stream”**. A given community may have a variety of LBS-funded literacy service providers across sectors and streams. These are designated as follows by MTCU:

- Three delivery sectors (community based, community college, school board);
- Four cultural streams: Francophone, Anglophone, Native, and Deaf

The literacy services planning and coordination process develops the rationale for the service provision of each organization across the sectors and streams. **It’s also important to note that** some communities also have non-LBS funded literacy organizations which are not mandated to participate in the LSPC process.

Regional networks support LBS service providers through training, tools and resources to determine the effectiveness of the literacy programming – to set targets as a community and to monitor results. It is also the role of regional literacy networks to bring community partners such as Ontario Works, Employment Services, and/or Local Boards to the planning table to develop a community plan - their **“Literacy Services Plan”**. **Literacy is an issue that affects both** the employment and educational goals of Ontarians, **and it’s important that** community partners provide input about the skills that clients need in order to succeed in employment and educational settings. The range and level of literacy services offered in a community may depend upon what other community services exist that can complement LBS.

The Literacy and Basic Skills Program and Employment Services (ES) are close partners and work together as part of the broader Employment Ontario system. As of April 2012, all LBS service providers started using a **database system known as “EOIS-CaMS”** to create service plans for learners and to track and report a variety of learner data. This is the same case management system that Employment Services staff use to create a client service plan. A client or learner may have a service plan **concurrently in both LBS and ES, especially if the client’s goal is to obtain direct employment**. Strong information and referral protocols and effective service coordination strategies across a wide range of community service providers are important priorities of the Employment Ontario system, but the cooperative relationship of LBS and ES is especially important.

It is also the responsibility of each LBS service provider to participate in the Literacy Services Planning and Coordination (LSPC) process. This process of coordination and cooperation has three main purposes:

- To ensure that LBS Program funds are used effectively and efficiently to deliver quality LBS Program services within the community. The process requires collaboration among service providers to ensure that emerging needs are met and that there is no duplication of services.
- To ensure that all LBS Program learners have accurate and timely referrals, portable learner plans, learning achievements described in a common language, and a program that facilitates **the achievement of the learner's goal path.**
- To promote partnerships and collaboration among LBS funded service providers and other Employment Ontario stakeholders. These partnerships and collaboration will increase timely referrals, which support EO clients to move smoothly into LBS Program services and progress out of those services to their next step.

The regional literacy network provides support for the process of local planning and coordination to produce the Literacy Services Plan for a given community. This process is undertaken annually in the late fall. Many regional networks facilitate more than one LSPC committee in their given geographic region. Each year the regional literacy network compiles a document which outlines the Literacy Services Plan for each community and, in turn, the LSP **informs the individual service provider's** annual business plan.

The Literacy Services Plan (LSP) **serves to identify the community's literacy needs based on** demographics, labour market information, the client focus of the LBS Program, service duplications and gaps. It also outlines the specific literacy services that local service providers will offer in the coming fiscal year. Regional literacy networks also work in a collaborative manner across the province to ensure consistency at the provincial level.

All the LBS service providers, from all delivery sectors and cultural streams, participate in the annual literacy services planning and coordination process for their community. This planning process will then lead to the creation of a "service delivery chart" **which summarizes a variety of information about each LBS service provider's delivery plans for the new fiscal year.** Regional networks then submit the service delivery charts, as well as a narrative description of some features of the community and its needs, to MTCU for approval.

Once the LSP process is complete, you can look ahead to the annual business planning process. The LBS business plan is due to MTCU in the weeks following the approval of the LSP. Each service **provider's business plan flows from the LSP** and reflects the commitments that each LBS organization has made at the local planning table. Specifically, your business plan must mirror the information you committed to in your service delivery chart for the LSP. See a sample service delivery chart: http://www.tcu.gov.on.ca/eng/eopg/publications/lbs_lsp_2016_2017_sd_charts.doc.

For more information about LBS business plans, see the information later in this manual.

LSPC and Local Labour Market Planning

The annual Local Labour Market Planning (LLMP) process is led by Local Boards (previously known as Local Training Boards) who are also MTCU-funded to do the following:

- engage communities in a locally-driven process to identify and respond to the key trends, opportunities and priorities that prevail in their local labour markets;
- facilitate a local planning process to address local labour market issues of common interest; create opportunities for partnership development activities and projects;
- organize events and activities that promote the importance of education, training and skills upgrading.

The end result is a publication of an annual LLMP report for each region. The Literacy Services Planning and Coordination process includes active participation in the LLMP process to ensure that the LBS Program is recognized as an integral component of action items proposed to address the **region's skills development** needs. The LLMP process/report is also utilized in the Literacy Services Planning and Coordinating process as a source of current labour market information that supports LBS Program planning and delivery.

Employment Ontario and LBS

What is the LBS Program's relationship with Employment Ontario? Where do we fit into the larger training and employment system? To answer these questions, we need to look at some history associated with funding agreements between the federal and provincial governments.

In November 2005, the provincial and federal governments signed the Labour Market Development Agreement (LMDA) which allowed plans for the new Employment Ontario system to move forward. Through this agreement the federal government transferred funding and resources linked to training and employment supports and benefits to the Ontario Ministry of Training, Colleges and Universities (MTCU). Employment Ontario was formally launched on January 1, 2007.

Employment Ontario programs and services include the Literacy and Basic Skills Program, Employment Services, Second Career, Apprenticeship, Self-Employment Benefit program (ending March 2016), Local Boards (for labour market planning), and services that support employers. Employment Ontario is designed to help people seeking to upgrade their skills, looking for work, wanting to start a career or their own business, or looking for a career change. It can also assist employers to find and hire people with the skills that employers need.

As mentioned previously, the Employment Ontario **Partners' Gateway** web site is an essential and **critical source of information and is MTCU's official communication method for notifying service providers of updates, forms, reporting templates, etc.** The site can be found here: <http://www.tcu.gov.on.ca/eng/eopg/>.

Section 2

Program Administration

The LBS Agreement

One of the documents you will receive from the Ministry of Training, Colleges and Universities in the course of the year is your annual contractual agreement. This is a legally binding agreement with MTCU. General information about LBS agreements can be found on the EOPG site at http://www.tcu.gov.on.ca/eng/eopg/programs/lbs_administration.html.

In addition, a sample (from 2012) of this agreement is posted at http://www.tcu.gov.on.ca/eng/eopg/publications/lbs_service_delivery_2012_sample.pdf.

For many years, the agreement has included several pages of standard contract language and articles used by MTCU, followed by additional **sections (known as “Schedules”) described below:**

- Schedule A informs you of the background, roles, responsibilities, and guidelines of LBS agreements;
- Schedule B outlines your funding for the duration of the agreement (normally one fiscal year, April 1 to March 31), as well as performance commitments and core activities to which your organization has committed to for that fiscal year;
- Schedule C outlines the payment schedule and the amount to be paid to your organization by MTCU at each interval;
- **Schedule ‘D’ outlines MTCU’s annual reporting requirements and due dates.**

LBS agreements are normally made available to service providers in the late winter but before to the fiscal year-end date of March 31. **Two copies of your organization’s agreement** are delivered by your MTCU consultant, or sent via regular mail.* **You must have both copies signed by your organization’s signing authority and send them to MTCU, by the date indicated.** One signed copy should be kept with your files, normally with your Business Plan, and the other signed copy is kept by the MTCU Regional Office.

It is important that you understand your agreement and its obligations for you and your organization. Should you have any questions regarding your agreement, contact your MTCU Employment and Training Consultant.

*(*Note: at the time of finalizing this manual, MTCU was in the process of automating the LBS agreement process using their “SP Connect” system, which is part of the larger Employment Ontario Information System (EOIS) used by service providers to report a variety of data required by MTCU. For more information on EOIS and SP Connect, please see the section devoted to that later in this guide.)*

LBS Service Provider Guidelines

As a new coordinator/manager, one of the first things you will want to do is familiarize yourself with the *Literacy and Basic Skills Service Provider Guidelines*. Every LBS service provider should have a copy of this document in the office. You can download the 2016 version from the EOPG site: http://www.tcu.gov.on.ca/eng/eopg/publications/lbs_service_provider_guidelines.pdf.

The Ministry of Training, Colleges and Universities funds a variety of Ontario organizations to provide literacy services. There are approximately 200 LBS organizations operating across almost 300 sites in Ontario. The *LBS Guidelines* provide you with information about your roles and responsibilities when you deliver and administer the LBS Program. They also provide the broad policy direction that is needed by service providers to deliver the LBS Program under their transfer payment agreement with the MTCU. These guidelines form part of the contract between the LBS service provider and the MTCU. Consequently, it is critical that the new program coordinator be familiar with the contents of the *LBS Guidelines*.

Among other things, important legislative requirements are included in the *LBS Guidelines* including **service providers'** responsibilities under the Accessibility for Ontarians with Disabilities Act (AODA) and Access to Information and Protection of Privacy.

While some information in the *Guidelines* is more generic and applicable to broader MTCU processes, there are many LBS-specific items you will wish to pay attention to immediately including the Performance Management Framework (PMF) and the Service Quality Standards (SQS). In MTCU's words, "**The introduction of a Performance Management Framework (PMF) to the LBS Program aims at making the program more effective, efficient and customer focused.**"⁴

In later sections, this *Beginner's Guide* contains a detailed explanation of the PMF and SQS mentioned above. Throughout this manual, you will see many references to the *LBS Guidelines* to draw your attention to areas of particular importance.

It is worth noting that in addition to funding "face-to-face" LBS programs (those where learners attend in person), the MTCU also funds a small number of online programs for LBS learners who prefer (and are suited for) distance learning. Some learners participate in a combination of face-to-face and distance programming. The five online programs available through LBS are collectively **known as "e-Channel"**. Information and referral processes related to e-Channel can be downloaded at <http://alphaplus.ca/en/news/news/410-e-channel-information-and-referral-guide.html>.

⁴ LBS Service Provider Guidelines June 2015

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

Employment Ontario Information System

LBS service providers are required to record and submit a variety of learner, program, and organizational data using MTCU's "Employment Ontario Information System" also known as EOIS. The use of EOIS for LBS began on April 1, 2012 and replaced MTCU's legacy system known as the IMS (Information Management System). Only authorized users are able to view client and program information recorded in EOIS.

General information, training videos, and resources for EOIS use can be found by using the links provided on the EOPG site at <http://www.tcu.gov.on.ca/eng/eopg/eotransformation/eois.html>.

The EOIS consists of three sub-systems listed below:

- Employment Ontario Information System – Apprenticeship (EOIS-APPR)
- Employment Ontario Information System – Case Management System (EOIS-CaMS)
- Employment Ontario Information System – Service Provider Connect (EOIS-SP Connect)

LBS providers do not use the EOIS-APPR system but do use the other two: EOIS-CaMS and EOIS-SP Connect.

As soon as possible, you will need to request access to the EOIS systems and learn their general features and how they relate to required data entry, record keeping, reporting requirements, and overall performance management. There are a number of ways you can familiarize yourself with EOIS:

- You can view the guides and resources found at the link above.
- Depending on the size and staffing capacity of your organization, you may have in-house colleagues to mentor you in EOIS use.
- If not, contact your regional network to assist you in finding guidance and support from experienced LBS partners.

Consulting with LBS colleagues who are experienced in EOIS use (whether they are part of your organization or another) is an excellent way to begin your orientation.

EOIS-CaMS

Since EOIS-CaMS implementation, LBS service providers have spent considerable time and resources to learn the system and to ensure they are complying with MTCU requirements for data entry and reporting. Some examples of data entered into the EOIS-CaMS system include (but are not limited to!) the following:

- Learner registration information, e.g. "tombstone" data, demographics, educational history, personal profile, etc.
- Learner plan information, e.g. goal path, activities, etc.
- Training supports, e.g. funds provided to eligible learners for transportation/childcare
- Learner exit and follow-up information

Registering learners in the EOIS-CaMS systems generates a unique identifier number for each individual, and this number remains with the client/learner if s/he accesses other Employment Ontario programming such as Employment Services. The “tombstone” data recorded in CaMS is attached to this unique identifier and is therefore accessible by authorized users from other EO organizations.

EOIS-CaMS can be used to produce a number of reports designed by MTCU. As such, EOIS-CaMS is **very closely linked to MTCU’s program monitoring and performance** management for LBS service providers.

EOIS-SP Connect

The SP Connect sub-system of EOIS was implemented in fall 2015 and began with submission of the “**Estimate of Expenditure**” financial reports (EER’s) which are described later in this guide. This was followed by submission of the annual business plans on SP Connect. Previously, reports or documents such as these were submitted by a combination of fillable PDFs, email, and/or surface mail depending upon the type of report and signing authority required.

When fully implemented, SP Connect will be used for all of MTCU’s contract and financial administration for Employment Ontario programs. As with EOIS-CaMS, the SP Connect system is closely tied to accountability, contract compliance, and program monitoring.

EOIS Access and User Management

The use of the EOIS requires each organization to designate a “SPRA” (Service Provider Registration Authority) who is responsible for managing the user accounts and licences provided by MTCU for access to EOIS-CaMS and EOIS-SP Connect. Likely, you will be the designated SPRA as it is normally a senior manager in the organization who has the authority to manage users and to be accountable for system access and confidentiality of data.

Among the many user guides available for EOIS, the *Service Provider User Guide* will provide you with information about getting system access and managing user accounts.

http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams_day1/userguide/eois_cams_ch4_sp_info_user_mgt.pdf

You can also contact your ETC directly for guidance in getting your access set up, especially if the previous coordinator/manager in your organization was also the SPRA but is no longer there to assist you.

Regional and Provincial Data Collection and Reports

Since regional literacy networks and other LBS support organizations cannot access the EOIS-CaMS data directly, MTCU provides those organizations with access to municipal, regional and provincial “roll up” reports that become available in July or August of each year. These reports are further analysed using data over time and comparative data. Your regional network, along with the service providers, analyse the statistics that are relevant to each community which helps to inform the annual Literacy Services Plan.

These roll-up reports are collectively known as **the** “Consolidated Municipal Service Manager” reports, and they can be downloaded from the EOPG site **under the heading “Data Reports”** from the following page: https://www.tcu.gov.on.ca/eng/eopg/programs/lbs_regional_lsp.html#cmsm.

Annual Business Planning

MTCU requires LBS service providers (and support organizations as well) to submit an annual business plan, typically in late November of each year. One of the first things you will want to do as a new program coordinator is to find your current business plan and familiarize yourself with it, and then make sure the goals and objectives are included in your own annual work plan.

The business plan template will include province-wide targets for the LBS Performance Management Framework (PMF) measures described later in this manual. The provincial targets may change from year to year, so you will determine how your organization is going to achieve those targets and indicate this in your business plan accordingly. Your organization may not be achieving the provincial targets, in which case you usually need to describe strategies for improvement toward meeting those targets. You may want to discuss the targets, particularly those you may not be meeting, with your MTCU Employment and Training Consultant (ETC) as you do need to demonstrate year over year that you are continuously improving your results.

As mentioned in the earlier description of the Literacy Services Planning and Coordination (LSPC) process, there are some elements of the LSPC information which must be included on your annual business plan.

Visit the EOPG web site link below for more information on the annual LBS business planning process and documents.

http://www.tcu.gov.on.ca/eng/eopg/programs/lbs_business_planning.html

Introduction to the Ontario Adult Literacy Curriculum Framework (OALCF)

Background

The Ontario Adult Literacy Curriculum Framework (OALCF) is a broad framework based on the recognition that learners' participation, persistence, and success in the Literacy and Basic Skills Program improve when literacy programming is linked to learners' goals and takes into account their cultural and linguistic backgrounds. This is known as contextualized programming, and it is a critical feature of the OALCF. It is important to note that the OALCF is not a curriculum itself but rather a high-level framework containing indicators of general areas of competency for adults in life, learning, and work.

The OALCF supports literacy practitioners to plan and deliver contextualized programming for Anglophone, Deaf, Francophone, and Native adult learners with different goals and learning needs. It also supports the assessment of learner progress so that learners' goal-directed outcomes can be measured and easily understood by learners, practitioners, and other stakeholders and reported through EOIS-CaMS to the Ministry.

What can LBS-funded delivery service providers now provide?

Within the OALCF, literacy organizations can now provide the following:

- competency-based programming that uses standards at three levels of performance to assess task-based learner progress;
- clear direction on how a learner's goal connects with assessment and learning content choices;
- strong focus on the importance of learners being able to use their newly acquired literacy skills and competencies in meaningful ways.

Who developed the OALCF?

"The competencies [identified in the OALCF] were established by synthesizing responses from the [LBS] field to the question, "What do learners learn in literacy programs?" Development team members who were knowledgeable about the needs of learners who are Francophone, Deaf, Native, and Anglophone, and who were experienced practitioners from community-based, school board, and college service providers independently identified tasks typically included in LBS programming. Through discussion, the team reached consensus on the six competencies in the curriculum framework and their task groups."⁵

⁵ Curriculum Framework Conceptual Foundation

http://www.tcu.gov.on.ca/eng/eopg/publications/OALCF_Curriculum_Framework_Conceptual_Foundations_March_2011.pdf

The description above is from the *Curriculum Framework Conceptual Foundation* document and can be found at http://www.tcu.gov.on.ca/eng/eopg/publications/OALCF_Curriculum_Framework_Conceptual_Foundations_March_2011.pdf.

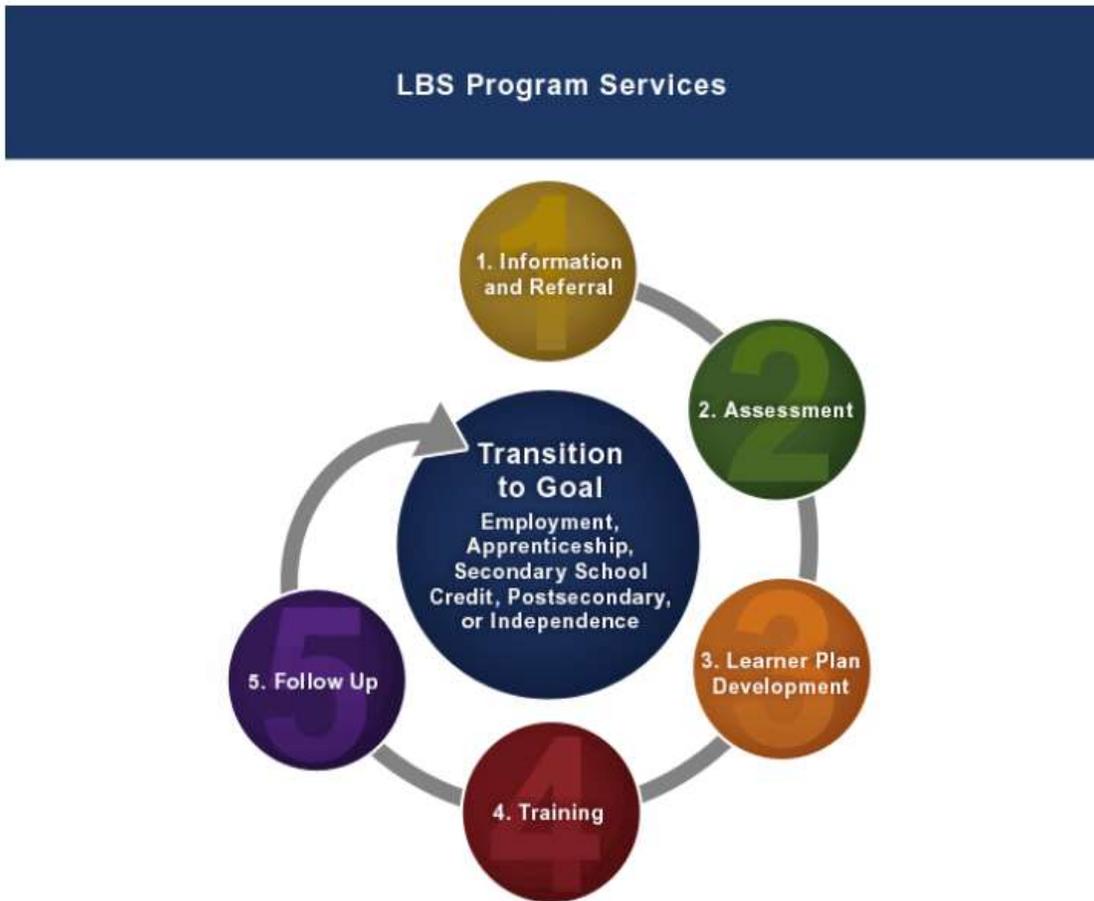
Purpose of the OALCF

“The OALCF’s primary purpose is to support Literacy and Basic Skills (LBS) Program service providers as they help learners develop the required knowledge, skills, and behaviours to successfully transition to their goals of:

- Employment;
- Apprenticeship;
- Secondary School Credit;
- Postsecondary;
- Independence.

Each LBS learner has a “Learner Plan” that is linked to one of those five goal paths listed above. If you would like to read more detailed information about the LBS goal paths, you can view documentation **at this link under the heading, “How does the OALCF contribute to successful learner transitions?”** http://www.tcu.gov.on.ca/eng/eopg/programs/lbs_oalcf_overview.html.

Figure 1: LBS Program Services and Goal Paths



The five services noted in this figure represent the five key “funded” services of LBS programming as detailed in the *LBS Guidelines*.

“Using the OALCF, practitioners can establish the link between LBS programming and literacy use in meaningful real-life applications—enabling learners to achieve their goals at home, at work, in educational settings, and in the community.”

Source: http://www.tcu.gov.on.ca/eng/eopg/publications/OALCF_introducing_the_CF_Mar_11.pdf

What is task-based programming?

“The OALCF supports practitioners in the implementation of task-based programming, which extends literacy instruction beyond the development of discrete skills. Instead, practitioners focus on **strengthening the learner’s ability to integrate skills, knowledge, and behaviours required to perform authentic, goal-related tasks.**”

The Framework is comprised of six areas of competency:

1. Find and Use Information;
2. Communicate Ideas and Information;
3. Understand and Use Numbers;<
4. Use Digital Technology;
5. Manage Learning;
6. Engage with others.”

For more detailed information, refer to the OALCF document:

http://www.tcu.gov.on.ca/eng/eopg/publications/OALCF_Curriculum_Framework_Mar_15.pdf.

Practitioners can combine elements of the OALCF to develop integrated tasks, in which learners complete complex tasks that accurately reflect real-life literacy use. The *Integrated Tasks by Goal Path* document provides five sample integrated tasks for practitioners to review and can be found at http://www.tcu.gov.on.ca/eng/eopg/publications/OALCF_integrated_tasks_Mar_11.pdf.

How does the OALCF support learner mobility?

“The OALCF helps learners communicate their goal-related program achievements in an easy-to-understand way, both within and beyond the LBS Program. It provides a common language that describes learning and learner progress in terms of what a learner can do. The competency-based curriculum framework provides the standards and levels to which learner achievements are articulated.

Learner progress is described through the performance of standard tasks called milestones so that **learners’ achievements will be more easily understood by various key stakeholders, such as employers or providers of other Employment Ontario programs.** One indicator of transition-readiness will be described through standard integrated tasks called culminating tasks. Both milestones and culminating tasks are aligned to the curriculum framework and must be used with the learner according the instructions and conditions outlined in the User Guides.”

Source: http://www.tcu.gov.on.ca/eng/eopg/publications/OALCF_introducing_the_CF_Mar_11.pdf

Want more information?

To learn more about transition-oriented programming and the elements of successful transitions to **the learner's next step**, please refer to the Foundations of Transition-Oriented Programming document found at

http://www.tcu.gov.on.ca/eng/eopg/publications/OALCF_Foundations_of_Transition-Oriented_Programming_March_2011.pdf.

OALCF overview page at

http://tcu.gov.on.ca/eng/eopg/programs/lbs_oalcf_overview.html

Changes to OALCF since its release in April 2011

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

Community Literacy of Ontario has on-line videos (revised Dec 2013) below.

<http://www.communityliteracyofontario.ca/oalcf-and-key-service-delivery-functions-online-training-videos-2/>

For specific tasks developed by the field see the OALCF task based activities for all streams at:

<http://taskbasedactivitiesforlbs.ca/>

For links to other OALCF related documents, visit the Northern Networks website at:

<https://www.northernliteracy.ca/article/projects-and-resources-147.asp>

Once you have familiarized yourself with the OALCF, you will also need to gain access to the OALCF **Repository where the "milestones" and "culminating tasks" are posted and downloadable. These are assessment-related tasks that link to the OALCF competencies and levels.** (See log-in page below.)

To access to this site, you must contact your MTCU Employment and Training Consultant who will provide you with log-in information and a password.

<http://oalcf-repository.ca/>

LBS Performance Management System⁶

Introduction

This section contains a summary of the LBS Performance Management System (PMS) developed by the Ministry of Training, Colleges and Universities (MTCU). The summary is meant to assist those who are not familiar with the LBS-PMS to understand the goals and elements of the system. More detailed information is available from the LBS Service Provider Guidelines

http://tcu.gov.on.ca/eng/eopg/publications/lbs_service_provider_guidelines_sdb_approved.pdf as well as the Employment Ontario Partners' Gateway http://www.tcu.gov.on.ca/eng/eopg/programs/lbs_performance_management.html.

The performance of LBS service providers is linked to the leadership roles of the senior managers and their ability to focus effectively and efficiently on results. To this end, performance management becomes a key condition in achieving quantifiable and verifiable results.

MTCU has provided training to the managers of LBS organizations, regional networks and cultural groups (“streams”) across the province on the LBS-PMS. You can access the training documents for phase one and two of the PMS at

http://www.tcu.gov.on.ca/eng/eopg/programs/lbs_performance_management.html

This training on the PMS was intended to help services providers build the organizational capacity needed to deliver on the commitments identified in their business plans and to comply with the LBS guidelines and their contractual agreements with the MTCU.

In other words, the MTCU has the following goals:

1. to help service providers deliver sustainable, effective, efficient and customer-oriented LBS services;
2. to focus on areas where support organizations can build their organizational capacity across the LBS provincial network.

First and foremost, the PMS is a strategic management system that ensures resources are being effectively used. It defines the expected results and their associated performance standards. Initially, the PMS is part of a change process that will alter the way things are done and current practices. Subsequently, as practices evolve, the PMS will gradually become an ongoing improvement process and a vehicle for innovation. In other words, the PMS helps to ensure that accomplishments are being measured, and that these accomplishments are being improved upon.

As illustrated in Figure1, the PMS has at its core three distinct but related components: the performance management framework, business intelligence and continuous improvement.

⁶ Source : Robillard, Michel, *Système de gestion du rendement des services d'AFB*, Contact-Alpha, volume 15, numéro 1, hiver 2013, pages 13-16.

Figure 2: Performance Management System

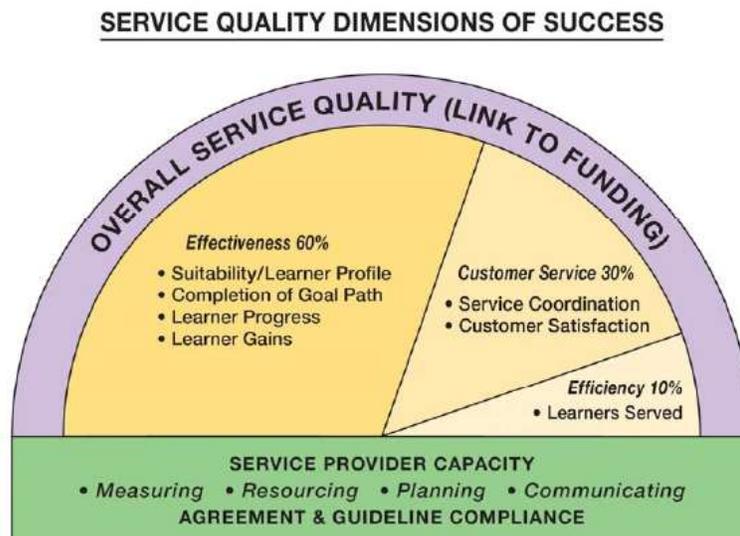


1.0 First Component: The Performance Management Framework

The performance management framework (PMF) consists of three elements:

1. service quality standard;
2. organizational capacity;
3. compliance with MTCU the agreement and LBS guidelines.

Figure 3: The Performance Management Framework



1.1 The Service Quality Standard

This standard (known as SQS) consists of three dimensions: Effectiveness, Customer Service and Efficiency, as illustrated in Figure 3. Each measure within each of these three dimensions has a weighting and numerical value attached to it. When the values are compiled monthly, the service provider receives **their SQS “score”**. The MTCU holds LBS service providers accountable for achieving the minimum targets for all of the measures as well as the overall SQS score.

It is important to note that during Phase I of the PMF implementation (2012-2014), each of the three dimensions consisted of a single performance measure. Under Effectiveness, for example, the measurement was **“Suitability/Learner Profile”** as defined by a set of indicators. In the case of Customer Service, the initial measurement was **“Customer Satisfaction”**. And finally, with regard to Efficiency, it was **the number of “Learners Served”** in a fiscal year.

In the subsequent phase of PMF implementation (2014-16) additional, weighted performance measures were added to the dimensions of Effectiveness and Customer Service. Effectiveness in this second phase is measured by both Suitability and Learner Progress, while Customer Service is measured by both Customer Satisfaction and Service Coordination.

When the PMF is fully implemented in its final phase (date to be determined) the proposed measures will include the following:

Table 1: Service Quality Standard (SQS) Measures

DIMENSION	MEASURES
Effectiveness	Suitability/Learner Profile Completion of Goal Path Learner Progress Learner Gains
Customer Service	Customer Satisfaction Service Coordination
Efficiency	Learners Served

It is very important for LBS providers to ensure that the data related to these performance measures is entered accurately and promptly into the EOIS CaMS database (described earlier in this manual) in order to reflect the LBS **service provider’s** actual performance. Of the many reports that can be generated from the EOIS-CaMS, the **“Detailed Service Quality Report 64” (DSQ)** is the one that MTCU uses to track **service providers’** performance progress against the PMF measures described above. The DSQ can also be used to identify trends and gaps in service delivery and to inform decisions about the quality and relevancy of programs and practices.

1.2 Organizational Capacity

Organizational capacity is the combination of the organization's sub-systems. These sub-systems include **human capital, techniques and knowledge specific to the organization's** field of expertise, management systems in place, and support (financial, logistics, human resources and risk management). These sub-systems and related processes come together to transform the available resources into an output that meets the needs of a specific customer group.

Within the context of the PMS, organizational capacity combines the following dimensions:

1.2.1 Measuring

Measuring consists of using available data to analyse and evaluate the success of business plans, conformity with the MTCU agreement, and compliance with LBS standards and quality standards within a results management context. This means that systems and processes are in place to track the **service provider's** performance and to measure any positive and negative variances in relation to the service provider's **commitments, as stipulated** in the MTCU agreement.

1.2.2 Planning

Planning consists of developing and implementing business plans but with a focus on the proactive management of these plans, by changing their needs in order to attain the goals stated in the MTCU agreement. Planning is also based on the evaluation and analysis of data, in order to make any necessary changes to programs and services that reflect the needs and trends of the labour market and the community.

1.2.3 Communicating

Communication addresses the interaction needed between the LBS **provider's** staff and the MTCU, the community, and the other key stakeholders. Communication is linked to governance and is based on an organizational structure supported by processes and policies to ensure accountability to the provider's various target client groups.

1.2.4 Resourcing

Resources are specifically related to the presence of clear and transparent financial, human resource, IM/IT and logistic administrative processes that ensure the organization is functioning properly. These processes contribute directly to the achievement of objectives and compliance with performance and service quality standards for the various client groups.

1.2.5 Risk Management

Finally, the risk assessment exercise conducted by the MTCU is used to evaluate the organizational capacity of organizations. In a context of continuous improvement, this allows organizations to identify potential risks and to implement mitigation strategies in a proactive manner so that performance objectives are not compromised by high levels of risk.

1.2.6 Compliance with the MTCU Agreement and LBS Program Guidelines

Service providers and support organizations are under contract with the MTCU and in this regard, they are obliged to comply with their contractual agreements by respecting allocated budgets, performance monitoring, required reporting, and all of the associated deadlines.

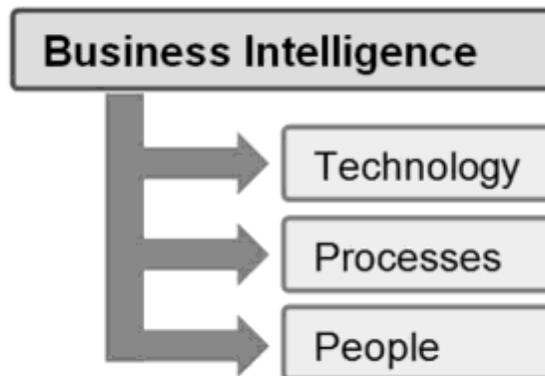
Therefore, it is essential that service providers read their contract very carefully, because it clearly stipulates the MTCU's expectations.

2.0 Second Component: Business Intelligence

Business intelligence (BI) allows stakeholders to make evidence-based and informed decisions in order to continuously improve LBS services. Business intelligence also consists of three elements:

1. technology,
2. business processes,
3. people.

Figure 4: Business Intelligence



2.1 Technology

Technology consists of using an information management system supported by an established protocol on its use, clear administrative rules, and regular reports that are relevant and based on valid and reliable evidence-based data. This data can be used to conduct analyses that make a significant contribution to decision making. In this way, we gain some insight into the extensive use of the EOIS-CaMS. The EOIS-CaMS is a system that fully meets expectations for the technology dimension of the business intelligence component. While the EOIS-CaMS provides MTCU with much data, many LBS service providers also use additional technology resources and software for record-keeping related to day-to-day operations specific to the needs of their organization.

2.2 Business Processes

Processes are to technology what rain is to crops; inextricably linked. When planning, decision-making and data collection processes (supported by relevant policies) exist and are in effect, they allow decision-makers to make informed decisions about performance discrepancies and observed trends.

2.3 People

Human resources are central to business intelligence and are the determining factor in collecting data that is valid and reliable, in entering data in the EOIS-CaMS, in producing reports, and in analyzing the data, all of which contribute to evidence-based decision making. As a result, it is essential that LBS staff be well trained and that emphasis be placed regularly on the need to enter valid and reliable data. In the end, the reliability of this data constitutes the basis for continuous improvement

3.0 Third Component: Continuous (or Continual) Improvement

“According to the ISO 9000 standard, the definition of continuous improvement is as follows:

Continuous improvement: Recurring activity to increase the ability to fulfill requirements

Also according to the standard:

Requirement: Need or expectation **that is stated, generally implied or obligatory.**⁷

Essential to understanding this definition is understanding what the MTCU is trying to achieve in presenting the continuous improvement (CI) component of the PMS as “the integration of performance measurement and business planning into the daily operations of **an organization.**”⁸

As a result, the continuous improvement process is based on the following:

1. the analysis of reliable and valid data and outcomes;
2. the observation of trends and recognition of positive or negative variations in relation to the established objectives;
3. the planning of improvements or changes to the programs in order to close the gaps.

⁷ <http://mathieuvigan.com/lamelioration-continue-et-la-roue-de-deming/> February 27, 2013.

⁸ Employment Ontario: Literacy and Basic Skills – Performance Management System for Service Providers and Support Organizations – Participant Guide, Unit 4|2, Ontario, 2013. (will need link to English version)

Conclusion

This section has provided a brief overview of the PMS components and their importance to both LBS service providers and LBS support organizations. As a new program coordinator/manager, be sure to use your experienced colleagues to help you understand and work with the LBS-PMS and associated data collection, reporting, and contract compliance.

Program Monitoring

In 2015-16, MTCU introduced a new “Strategic Monitoring” process for LBS service providers. The purposes of the new process are outlined below:

- Streamline the current monitoring process to better use existing tools and resources;
- Allow MTCU and service delivery sites to better manage workloads and optimize resources in the time required for monitoring;
- Identify service providers that require greater support.⁹

The Strategic Monitoring process has three distinct methods or approaches for program monitoring: Paper-Based, Targeted, and Comprehensive. Below is a brief description of each.

Table 2: Strategic Monitoring¹⁰

Paper-Based	Paper-Based monitoring provides an opportunity to check in with the service delivery site if no issues have been identified. The Paper-Based Self-Assessment Questionnaire forms the basis of the monitoring process.
Targeted	Targeted monitoring focuses only on areas identified as needing additional support. Through the service providers’ completion of applicable areas of the Targeted Self-Assessment Questionnaire, ETCs can work with the site to identify improvement requirements.
Comprehensive	Comprehensive monitoring is an in-depth monitoring process for sites where a number of issues have been identified. Every service delivery site will undergo a Comprehensive monitor at least once every three years.

Monitoring may include, but is not limited to, the following components:

- An examination of all aspects of **your organization’s operations** and what your organization has committed to in your annual business plan;
- ETC interviews with learners;
- A detailed file audit where the ETC compares a sample of your paper based learner files with the information you have recorded in the EOIS-CaMS.

Following the program monitor, the ETC summarizes, in writing, the visit and any areas for improvement. The service provided is required to respond, in writing, within a specified time to address the noted items.

⁹ Memorandum to LBS Service Providers September 2015

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

¹⁰ Ibid

In addition to the processes described above, ongoing monitoring occurs through the submission of required reports such as the Quarterly Status and Adjustment Report (QSAR) which requires service providers to use selected EOIS-CaMS reports to compile and comment on specific data related to the Performance Management Framework.

For more details on MTCU's current monitoring tools and processes, see the heading "Service Providers - Strategic Monitoring" found on this site:

http://www.tcu.gov.on.ca/eng/eopg/programs/lbs_performance_management.html

Financial Compliance

Keeping accurate records will be your responsibility, and **rest assured, you will be asked...** not just by your auditor, but by your MTCU Employment and Training Consultant (ETC) when s/he conducts a Program Monitoring visit. Being organized at this level will save you time and trouble down the road.

Your financial reports need to be prepared according to Ministry specifications. The funding you receive may only be spent on activities directly related to LBS delivery. Below are four useful tips to think about:

- ✓ Keep your paid invoices filed by either supplier; or by month paid.
- ✓ Provide adequate explanations for all journal entries.
- ✓ Reconcile your bank statements with your paid cheques and deposit slips on a monthly basis.
- ✓ Keep details of the purchase or sale of equipment or other fixed assets.

Eligible expenses can include the following:

- Rent and utilities for instructional space and program administration functions;
- Instructor salaries and benefits;
- Salaries and benefits for staff providing program administration services;
- Professional development of staff and practitioners;
- Volunteer orientation and co-ordination;
- Materials and supplies for workshops, instructional resources;
- Administration of training support;
- Telephone, fax, and Internet access;
- Office supplies and leased equipment;
- Insurance (board, property, and liability);
- Costs associated with participating in local planning and coordination;
- Staff travel for meetings, conferences, professional fees;
- Administrative fees or indirect expenditures which cannot exceed 15% of the associated operating budget;
- Outreach and recruitment (promotion, marketing, advertising);
- Accounting services;
- **Auditor's fees (when audited statements are required by MTCU).**

To assure yourself that your organization is prepared for a monitoring visit, verify that your organization's files include the following documents and that they are readily available for the auditor, as well as for your ETC for site monitoring:

- ✓ Board Minutes of the fiscal year (originals);
- ✓ Bank Statements / cheque stubs;
- ✓ Other banking information (i.e. term deposits);
- ✓ Financial reports;
- ✓ Budget information;
- ✓ Project expenditures and revenues/rationale;
- ✓ Donation receipts (if applicable);
- ✓ HST statement for fiscal year;
- ✓ Profit and loss statements;
- ✓ All organization invoices;
- ✓ All petty cash invoices ;
- ✓ Bank deposit book(s);
- ✓ Any correspondence from funders regarding financial matters;
- ✓ Payment schedules;
- ✓ T4 slips for staff; T4A slips for self-employed individuals
- ✓ Organization Income Tax Return;
- ✓ Corporation Papers;
- ✓ Organization licences (Nevada, Raffles, etc.);
- ✓ Organization By-laws.

Once your business year has ended (March 31) you will be facing the annual job of having to submit your books and records for an independent audit and for submission of the annual Statement of Revenue and Expenditure Report (SRER) to the MTCU. If you have an accountant, it is advisable to make sure all the above documents are prepared. Efficiency in this manner will save your accountant time and save your organization money. Today, with the accounting software packages available to small businesses, you will have your cheque register, sales and deposit journals, general ledger and sub ledgers in those accounts.

Any unspent LBS funding, including any interest that may have been earned on the funding throughout the year, must be kept in an interest-bearing bank account at the end of each fiscal year until the MTCU recovers that funding.

You will find the *2015-2016 LBS Audit and Accountability Guidelines* along with a sample auditor's report **under the "Financial Reporting" heading** at:
http://www.tcu.gov.on.ca/eng/eopg/programs/lbs_administration.html.

Any changes to these guidelines will be posted on this website as will updated documents for business cycles beyond 2015-16.

Estimate of Expenditure Reports

All LBS service providers are required to submit six Estimate of Expenditure Reports (“EER’s”), at particular intervals during the fiscal year. You will find **the due dates for your EER’s** in the most recent Audit and Accountability guidelines mentioned above. **EER’s are submitted electronically via MTCU’s “SP Connect” system described previously.**

Your Organization's Annual Work Plan

The table on the following pages is an annual work plan of due dates for different documents which you will be required to submit to either MTCU, Canada Revenue Agency, or your regional literacy network. Some of the dates that appear in the work plan will vary from year to year, but you can refer to the actual documents for those dates. Documents showing deadlines have been identified in the table below with links, where applicable.

There will be other items in your work plan which will have varying dates according to your own organization and network. Some of these which you will want to include in your annual work plan are:

- Monthly Board Meetings;
- Annual General Meeting;
- Special Annual Events.

Sample Annual Work Plan

Deadline(s)	Event	Document	Location	How to file
Prior to the 15 th of every month	Source Deductions (based on monthly instalments)	Canada Revenue Agency Source Deductions Remittance Voucher	You will have received the Source Deductions Remittance Voucher by mail (unless you are filing electronically).	You or your bookkeeper/treasurer will complete the form, attach the necessary cheque, and mail by the deadline. There is a penalty if you do not file by deadline.
Quarterly	Quarterly Status and Adjustment Reporting	Quarterly Status and Adjustment Report (QSAR). Link to template: http://www.tcu.gov.on.ca/eng/eopg/publications/lbs_sd_qsar_2015_2016_template.doc	EOPG website- Programs and Services/ /Literacy and Basic Skills/ Performance Management System. Link: http://tcu.gov.on.ca/eng/eopg/programs/lbs_performance_management.html	QSAR's for your organization are to be submitted via email to the ESRD mail box and a copy to your TCU Training Consultant. Submission dates are as reflected in the QSAR template document
Mid-June of each year	Submission of Audit	Statement of Revenue and Expenditure, with a separate statement for each funded site with a Schedule B, and each project funded.	Every year the Audit Guidelines are posted on the EOPG website. Under LBS/ administration and agreements Link: http://tcu.gov.on.ca/eng/eopg/programs/lbs_administration.html	Reports are to be via email to the ESRD mailbox and a copy to your TCU Training Consultant

Deadline(s)	Event	Document	Location	How to file
June 15 th	Application for GST Rebate	Application for GST/HST Public Service Bodies' Rebate and GST Self-Government Refund (Form GST66)	Download this document from the Canada Revenue Agency web site: http://www.cra-arc.gc.ca/E/pbg/gf/gst66/README.html . This document is only available in electronic format.	You or your bookkeeper/ treasurer must complete the form and mail to the Canada Revenue Agency at the Summer side Tax Centre (address is on form).
September 30 th or earlier	Registered Charity Information Return deadline (file earlier if possible). Your charitable status may be revoked for failure to file on time.	Registered Charity Information Return. Form T3010A (05); Form TF725; Form T1235; Form T1236 (if applicable).	If you are a registered charity, the forms for the current fiscal year will be sent to you by mail. All forms and publications are available on the Canada Revenue Agency web site at: http://www.cra-arc.gc.ca/chrts-gvng/chrts/formspubs/menu-eng.html or you may call 1 800 267-2384.	Mail the return with all the required attachments to the Canada Revenue Agency. Keep a copy for your own records.
Every month	Source Deductions (based on monthly instalments)	Canada Revenue Agency Source Deductions Remittance Voucher	You will have received the Source Deductions Remittance Voucher by mail (unless you are filing electronically).	You or your bookkeeper / treasurer will complete the form, attach the necessary cheque, and mail by the deadline. You may also set up online filing through your bank. There is a penalty if you do not file by deadline.
Late November each year, however this date can change	Submit Annual Business Plan. This item takes some preparation so plan well in advance of deadline.	LBS Program - Business Plan - Template for Service Delivery Organizations	Both the Business Plan template and the instructions will be available on the EOPG web site under Programs and Services/Literacy and Basic Skills/ Business Planning http://www.tcu.gov.on.ca/eng/eopg/programs/lbs_business_planning.html	This will be submitted electronically to MTCU through the ESRD mailbox and a copy sent to your TCU Consultant.

Section 3

The Learners

Learner Screening and Intake

Screening and intake of clients involves a process whereby the service provider gathers relevant information and, in consultation with the client, determines if the LBS program is the most appropriate intervention.

Next, the service provider will determine which LBS service provider in the community is best-suited to serve that client based on her/his goal path, education history, profile, skill level, etc. If appropriate, the client may then be referred to a partner LBS program in the community, or s/he may continue on with the registration process at your program if it best serves her/him. In a case where a client may not have any set goals, a referral to Employment Services may be an appropriate first step. If the client has other needs such as housing, counselling, etc., a referral to another community organization outside of LBS may also be appropriate, either along with accessing LBS services or as a stand-alone referral.

Once the service provider is ready to proceed with registering a client into LBS, the service provider will document the process using two MTCU mandatory forms: the *LBS Participant Registration Form* and the *Learner Plan*.

The *LBS Participant Registration Form* is used with clients who are eligible, suitable and interested in attending LBS services, in person, or via online/distance programming.

The Participant Registration Form has been designed to:

- capture client information which is required to record eligibility and suitability;
- record **the client's consent to collect information**;
- register LBS learners in EOIS-CaMS; and
- develop the initial elements of the Learner Plan.

Once signed by the client, the information on the Participant Registration Form will be entered into the EOIS-CaMS to open a client service plan. A learner plan is then generated. The learner plan is a **"living document" which includes** background information, goals, assessment results, program activities, and outcomes at exit. The learner plan was formerly referred to as the "training plan", **but** they each perform the same function of providing the road map for the practitioner and the learner, i.e. recording LBS activities and outcomes that are achieved.

An electronic version of the learner plan can be generated from EOIS-CaMS and downloaded/converted to Microsoft Word format, so the service provider can add the program details. The plan needs to be updated regularly as learners complete items on the plan, and/or as the plan items are updated, deleted, revised, etc.

Service providers may also use their own version of the learner plan, e.g. in Excel format or another convenient template, as long as it contains the same features and information as the EOIS-CaMS generated template.

Learner Assessment

The Literacy Services Planning and Coordination (LSPC) Committee brings together LBS Program service providers in a community to ensure that there is a common understanding and acceptance of learner assessment results. Service providers use a wide range of formal and informal assessment tools that are matched to different assessment purposes (at intake, during programming and at exit for a range of learner goals).

The *LBS Program Guidelines* state that **"Assessment is any process or procedure that gathers information for making decisions about a learner's knowledge, skills, behaviours and abilities."** Learners may be referred from one LBS service provider to another LBS service provider. Learner mobility is greatly enhanced if the receiving organization has an understanding and acceptance of **the learner's achievements. It is also important that a learner not be reassessed and that their learning achievements are accepted as the starting point for next steps.**

The Ontario Adult Literacy Curriculum Framework (OALCF) provides common tools (milestone tasks, culminating tasks, learner gains) and a common language (five goal paths and six competencies at three levels of complexity) that will help to provide a shared understanding of assessment results among LBS service providers. It is an ongoing process to gain confidence in, and understanding of, assessment results used by different LBS and community service providers, which is why the regional literacy networks provide LBS service providers with the opportunity to discuss assessment at the LSPC Committee meetings.

The MTCU does not prescribe curriculum, content, or assessment tools but depends on the professional judgement of the LBS practitioner. However, on the OALCF website, http://tcu.gov.on.ca/eng/eopg/programs/lbs_oalcf_overview.html, there is a foundation paper on assessment and a collection of assessment tools that the service provider may want to reference when making assessment decisions.

Under the OALCF, some aspects of learner achievement will be described by the successful **completion of "milestone tasks", "culminating tasks"** and, coming soon, a **"learner gains"** assessment, which will be an assessment of skills measured on the 500-point IALS scale (International Adult Literacy Survey).

The OALCF documentation indicates the following

- **Milestone tasks are progress indicators which are "goal-related assessment activities that learners complete to demonstrate their abilities to carry out goal-related tasks."**
- **Culminating tasks are "more complex than milestone tasks, but are also aligned with the Curriculum Framework. Culminating tasks draw together multiple competencies which may be at different levels of complexity. The successful completion of a culminating task is an important demonstration of the learner's ability to manage the kinds of tasks they will encounter once they transition beyond the LBS Program."**
- **Learner gains assessment will be "used primarily for accountability purposes; it collects and uses numerical data about the progress of groups of learners- information that can be compared across programs."**

For more detailed information, please refer to all OALCF link on the Employment Ontario Partners' Gateway at http://tcu.gov.on.ca/eng/eopg/programs/lbs_oalcf_overview.html.

Learner Files

MTCU requires each service provider to maintain documentation and records as part of responsible **service delivery**. It's up to each **service provider** to ensure that systems are in place for planning and monitoring. Part of this includes the maintenance of a paper-based file for each learner.

Currently, MTCU requires that the following information be included in every learner file:

- A rationale for decisions made by the LBS service provider;
- LBS Participant registration form;
- Learner plan;
- Evidence of learner progress;
- Training Support documentation, if applicable;
- LBS Participant Exit form.

The materials in the learner files may contain other sensitive information such as referral information from other organizations and assessment records. It is critical that these be kept secure.

MTCU provides the following forms, which are mandatory:

- LBS Participant Registration Form;
- LBS e-Channel Participant Registration Form;
- LBS Program Exit and Follow-up Form.

These forms (and many other Employment Ontario forms for service providers) can be found on the EOPG website at <http://www.tcu.gov.on.ca/eng/eopg/tools/forms.html>.

In addition to these forms, MTCU also provides the learner plan template as mentioned in the Learner Assessment section of this manual. It is downloadable from EOIS-CaMS, and a training resource video **about this "Enhanced Learner Plan" is available at** http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams_modules/eois_cams_enhanced_learner_plan.html

Learner (Customer) Satisfaction

One important activity related to the Customer Satisfaction measure contained in the “Customer Service” dimension of the PMF is the learner’s exit interview as outlined below:

“LBS service providers must ask all learners who are about to exit the program to indicate, on a scale of 1 to 5, how likely they are to recommend the LBS Program to someone looking for similar services. This question can be found on the mandatory LBS Participant Exit and Follow-up form (<http://www.tcu.gov.on.ca/eng/eopg/tools/forms.html>). If the learner is not available to answer this question at exit, then the service provider should record the learners’ response as ‘no response’. It is important that it be completed at the end of the learner’s program and not during. Additionally, service providers will want to create an in-house satisfaction survey in order to capture a learners’ satisfaction during their time with the LBS program. We want to know how satisfied they are with their experience of being in the whole program. Excluded from these surveys are individuals who left after assessment.”

Source: http://www.tcu.gov.on.ca/eng/eopg/publications/lbs_2014_perf_mgmt_system_qas.pdf

In order to document the learner’s response to the question above, many service providers have included the question as part of a short paper-based survey that is administered to each learner at or close to exit. The question can also be asked verbally or by email or phone, as long as evidence of the response is documented in the learner file. The response is also entered in the EOIS-CaMS as part of the “plan closure” process.

Section 4:

Additional Resources and Appendices

Other Useful Websites

The following is a list of useful websites to further your training and information in the LBS practitioner field as well as to help you in your objectives as a new program coordinator. These websites are very useful for a variety of purposes, but you may also find that the wealth of information can be overwhelming, especially at first. Use this list as your basis, and ask your literacy network, ETC, or mentor for the most useful for your purposes. This list is neither exhaustive nor complete. It is merely a starting point.

ABC Canada

www.abccanada.org

ABC CANADA specializes in public awareness campaigns, and provides promotional support to local literacy groups. It is also the founder of Family Literacy Day, a national initiative that promotes the importance of reading and learning together as a family.

Alpha Plus

<http://www.alphaplus.ca/>

Alpha Plus is funded by the LBS program to support LBS organizations, for resources developed and the innovative use of technology in adult basic education.

Alpha Plus Centre actively supports research, and promotes best practices in adult basic education for practitioners and programs that work with adult learners in the Deaf, Aboriginal, Francophone and Anglophone communities through:

- innovative use of technology;
 - research;
 - design, development and dissemination of information and resources.
-

Community Literacy of Ontario

<http://www.communityliteracyofontario.ca/>

This website provides great support for community based organizations in a variety of ways, from training to newsletters to management and further literacy links.

Who We Are

Community Literacy of Ontario (CLO) is a provincial literacy network of 100 community literacy organizations **across Ontario. We provide many services to Ontario's community literacy** organizations such as: sharing information via bulletins and newsletters, producing exemplary resources and tools to support literacy organizations, hosting two websites, providing online training and holding an annual training event, and researching the needs and priorities of our members.

COPIAN

<http://library.copian.ca/>

COPIAN houses a comprehensive and easily accessible database of literacy-related classroom and research materials, available free to download. It also functions as a portal to adult literacy resources and services across Canada.

Deaf Literacy Initiative

<http://www.deafliteracy.ca/>

Vision

A world leader providing professional expertise and innovations in specialized literacy services to the Deaf and Deaf-Blind community and other coalitions.

Mission

Deaf Literacy Initiative leads in:

- Developing accessible and accredited training for practitioners and learners in the Deaf and Deaf-Blind literacy organizations.
- Undertaking consultation, research and technology initiatives that advance the Deaf and Deaf-Blind field.
- Producing accessible and culturally relevant learning resources.
- Promoting and supporting the needs of Deaf and Deaf-Blind literacy communities globally.

Essential Skills – Government of Canada

http://www.esdc.gc.ca/en/essential_skills/index.page

This site provides free and easy-to-use tools to help learners, employers and practitioners take action on Literacy and Essential Skills.

Search over 300 job profiles to see how these skills are used in the workplace.

Use the Literacy and Essential Skills Toolkit to help support skills upgrading at work and in everyday life. The Tools are categorized under three areas:

- Assessment;
- Learning;
- Training Supports.

Laubach Literacy Ontario

<http://www.laubach-on.ca/>

Laubach Literacy Ontario represents a network of community-based literacy programs. We use the services of trained volunteer tutors and trainers. Through Laubach-affiliated programs, tutors provide one-to-one and small group instruction for more than 3,500 adult students. These students want to upgrade their reading, writing, and math skills. In addition, they want to upgrade their essential skills and other skills based on their goals.

Literacy Basics

<http://literacybasics.ca/introduction-2/why-online-training/#>

Literacy Basics is a free, self-directed online training website for Ontario literacy practitioners. This innovative training website was researched, written and designed by Community Literacy of Ontario. Literacy Basics has been designed to help busy literacy practitioners access needed training at convenient times and locations. The training modules on Literacy Basics are self-directed; therefore participants can choose content and tools appropriate to their interests, needs, and skill levels.

LBS Practitioner Training

<http://www.lbspractitionertraining.com/>

This site offers professional development support for practitioners who work with adult learners in the Literacy and Basic Skills Program of Ontario. There are online courses, downloadable program materials and resources, an interactive self-assessment tool, and links to other LBS training websites. In addition, practitioners can connect with other professionals in the Staff Cafe forum to discuss issues related to learners and program delivery.

The Ontario Native Literacy Coalition

<http://www.onlc.ca/>

The Ontario Native Literacy Coalition (ONLC) is a non-profit, charitable organization, one of four provincial umbrella organizations funded by the Ministry of Training, Colleges and Universities. The ONLC is a provincial networking and field development organization supporting and serving Native literacy practitioners and learners in Ontario, providing information, support and training while enhancing ability and awareness of literacy issues.

Founded on the principles of the Seven Grandfather Teachings, the ONLC respects the individual as a whole person - part of a family, community, and a Nation.

Ontario Skills Passport

<http://www.skills.edu.gov.on.ca/OSP2Web/EDU/Welcome.xhtml>

The Ontario Skills Passport (OSP) provides clear descriptions of the Essential Skills and work habits important for work, learning and life. Essential Skills are used in virtually all occupations and are transferable from school to work, job to job and sector to sector.

The OSP offers high school students, adult learners, job seekers, workers, employers, teachers, trainers, practitioners, job developers and counsellors a common language, resources and tools that help build competence, confidence and connections.

Original Sources

Assessment Kit, Kingston Literacy. Ongoing Assessment - Tracking Model for Volunteer Tutoring Programs.

CABS - Common Assessment of Basic Skills Initial Assessment in 5 Levels (2000), Judith F. Lee. The CABS Initial Assessment Report and the Demonstrations are intended to be freely reproduced for assessment purpose. In this publication you will find Assessment tools, demonstrations, background information, and additional resources. Literacy Link Eastern Ontario (LLEO), 830A Development Drive, Bayridge Plaza, Kingston, ON K7M 5V7, E-mail: lleomail@ican.net. One can also access CABS from this website: https://www.lleo.ca/col/cabs_online.html

CARA - Canadian Adult Reading Assessment (2000), Dr. Pat M. Campbell & Flo M. Brokop. CARA is an informal reading inventory that can determine a student's instructional reading level and specific strengths and weaknesses in word recognition and comprehension. The instructor's manual and student's assessment booklet contain a graded word list and nine levels of passages, ranging in readability from grades one to twelve. Each level contains two fiction and three non-fiction passages. Publishers: Grass Root Press. Website: <http://www.grassrootsbooks.net/ca/>

Demonstrations Ontario, a Learning Basic Skills funded project, focuses on demonstrations that are relevant to employment and offers a demonstration builder for practitioners.

Goal-Directed Assessment: An Initial Assessment Process, Ontario Ministry of Education and Training 1997

Goal Setting for Learners, (Instructor's Manual and Manual for Learners), Stephanie Brennan. The instructor's manual gives background theory and strategies for working with learners and provides goal setting activities. Some of the areas topics include: goal setting, assessment, learning styles, notes about lessons, importance of setting goals, identifying needs, wants, dreams and supports needed in goal setting. Southwestern Ontario Adult Literacy Network, 475 Caradoc Street, Strathroy, ON N7G 2R1. E-mail: soaln@ican.net

Laubach Way to Reading and *Laubach's Breakthrough to Math* and *Patterns in Spelling* series have a number of Diagnostic Inventory forms for both initial assessment and learner outcomes assessments. Laubach Literacy Ontario is also a provincial literacy organization which has a certification process for practitioners. Website: <http://www.laubach-on.ca/>

The Level Descriptions Manual, a learning outcomes approach to describing levels of skill in Communications & Numeracy, as well as features and example performance indicators for the domain of Self-Management and Self-Direction. Produced by the Ontario Literacy Coalition

Linking Demonstrations with Laubach, Laubach Literacy Ontario (LLO) through Alpha Plus, you can access a comprehensive manual of learning outcomes demonstrations for programs using Laubach materials.

New to Adult Literacy in Ontario (2001), What Literacy Staff Need to Know, Anne Semple. This handbook gives a comprehensive overview of the literacy field, detailing the present structure and listing important information in tabbed, easy-to-find sections. Publishers: Literacy Link South Central, 213 Consortium Court, London, ON, N6E 2S8, Phone: 519 681-7307, Toll-free: 1 800 561-6896, E-mail: literacylink@bellnet.ca Website: <http://www.llsc.on.ca>

New to adult literacy in Ontario? (2003), What else literacy practitioners need to know, Patti Miller. Using the field development priorities as a guide, the Literacy Link South Central have compiled and organized some of the newest resources in the field. Publishers: Literacy Link South Central, 213 Consortium Court, London, ON, N6E 2S8, Phone: 519 681-7307, Toll-free: 1 800 561-6896, E-mail: literacylink@bellnet.ca Website: <http://www.llsc.on.ca>

The Revised Common Writing Assessment: A Tool linked to Ontario's LBS Learning Outcomes Levels, Ontario Literacy Coalition. This writing assessment tool is linked to the LBS learning outcomes Levels 1-5. This tool helps practitioners assess writing samples and share assessment results with learners. Copies of the manual are available from the OLC. Email: Urszula@on.literacy.ca

Working with Learning Outcomes, Literacy and Basic Skills Section, Workplace Preparation Branch, Ontario Ministry of Education and Training 1998. To order call 1 800 668-9938.

Sources

MTCU - Employment Ontario Partners' Gateway. This site provides support to service providers delivering Employment Ontario programs and services as part of the Employment Ontario network. It provides tools and materials to support the Employment Ontario brand, and employment and training information within the Employment Ontario network of service providers:
<http://www.tcu.gov.on.ca/eng/eopg/>

Ontario Adult Curriculum Framework website (OALCF). This site provides information about the OALCF and the resources that have been developed to support practitioners in implementing the OALCF:
http://www.tcu.gov.on.ca/eng/eopg/programs/lbs_oalcf_overview.html

The Alberta Teachers Association – Mentoring - A literature review:
<http://www.teachers.ab.ca/Publications/Other%20Publications/Mentorship%20Program%20A%20Model%20Project/Pages/Mentoring.aspx>

Appendices

Appendix 1 - Acronyms

The following acronyms are literacy and employment acronyms pertinent to use in Ontario. Some acronyms are attached to older documents and may not be in current usage.

A

AAP	Adjustment Advisory Program
ABE	Adult Basic Education
ABEA	Adult Basic Education Association of Hamilton/Wentworth (Network)
ABL/N	Adult Basic Literacy/Numeracy
ACA	Apprenticeship Certification Act
ACAATO	Association of Colleges of Applied Arts and Technology of Ontario (now "Colleges Ontario")
ACE	Academic and Career Entrance Program
ACL	Association for Community Living (old term)
ACTEW	A Commitment to Employment & Training for Women
AGM	Annual General Meeting
AlphaCom	On-Line Discussion Network for Literacy Organizations
AlphaPlus	Support Organization, Technical
AlphaRoute	Web-based distance education resource
ALS	Aboriginal Language Standardisation Project
ASL	American Sign Language
AU	Academic Upgrading
AUP	Academic Upgrading Partnership

B

BEST	Basic Education Skills Training
BTSD	Basic Training for Skills Development

C

CAAT	Canadian Adult Achievement Test
CABS	Common Assessment of Basic Skills
CAL	Canadian Alliance for Literacy
CAPLA	Canadian Association for Prior Learning Assessment
CBT	Community-Based Training
Centre FORA	Centre franco-ontarien de ressources en alphabétisation
CESBA	Ontario Association of Adult and Continuing Education School Board Administrators

CFLDB	Canadian Federation Labour Development Board
CH/SCH	Contact Hours/Student Contact Hours
CIPMS	Continuous Improvement Performance Management System
CLO	Community Literacy of Ontario
CLWE	Clearinghouse for Literacy Workers' Education
CNIB	Canadian National Institute for the Blind
COMSOC	Ministry of Community and Social Services
COA	Contract Quality Assurance
CQS	Core Quality Standards
CSAC	College Standards and Accreditation Council
CSC	College Sector Committee for Adult Upgrading

D

DLI	Deaf Literacy Initiative
DTP	Desktop Publishing

E

EARAT	Evaluating Academic Readiness for Apprenticeship Trades Training
EAS	Employment Assistance Services
EDU	Ministry of Education
EER	Estimate of Expenditure Report
EI	Employment Insurance
EO	Employment Ontario
EOIS	Employment Ontario Information System
EOIS-CaMS	Employment Ontario Information System – Case Management System
EOIS-SP Connect	Employment Ontario Information System – Service Provider Connect
EOPG	Employment Ontario Partners' Gateway (website)
ERC	Employment Resource Centre
ES	Employment Services
ESL/ESOL	English as a Second Language/English for Speakers of Other Languages
ESDC	Employment and Social Development Canada
ESP	Essential Skills Profile
ETC	Employment and Training Consultant

F

FSL	French as a Second Language
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G

GED	General Educational Development
GOLD	Goal of Literacy for Deaf People - (old term -see DLI)
GWA	General Welfare Allowance (old term – see OW)

H

HRDC	Human Resources Development Canada (old term – see ESDC)
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I

IALS	International Adult Literacy Survey
IALSS	International Adult Life Skills Survey
IAS	Industrial Adjustment Services
IC	Industry Canada
IELTS	International English Language Testing System
ILC	Independent Learning Centre
IMS	Information Management System
I&R	Information and Referral
IRPA	Information & Referral Protocol Agreements
ISD	Integrated Service Delivery

J

JCP	Job Creation Partnership
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L

La Coalition	la Coalition Francophone pour l’alphabétisation et la formation de base en Ontario
LAI	Labour Adjustment Initiative
LB/LTB/LTAB	Local Board/Local Training Board/Local Training and Adjustment Board
LBS	Literacy and Basic Skills
LCPP	(old) see LSPC
LD	Learning Disabled/Disability
LDAO	Learning Disability Association of Ontario
LFDS	Literacy Field Development Support/Services
LINC	Language Instruction for Newcomers to Canada
LINDR	Literacy Network of Durham Region
LITNW	Literacy Northwest (Network)
LLC	Laubach Literacy Canada (old)
LLEO	Literacy Link Eastern Ontario (Network)

LLI	Laubach Literacy International
LLMP	Local Labour Market Planning process
LLN	Literacy Link Niagara (Network)
LLO	Laubach Literacy Ontario
LLSC	Literacy Link South Central (Network)
LMA	Labour Market Agreement
LMDA	Labour Market Development Agreement
LMPA	Labour Market Partnership Agreement
LNNE	Literacy Network Northeast
LOARC	Learning Outcomes and Assessment Resource
LOCS	Literacy Ontario Central South (Network)
LOON	Literacy Opportunities in Ontario North
LSAF	Learner Skill Attainment Framework
LSPC	Literacy Service Planning and Coordination

M

MCL	Movement for Canadian Literacy
MCSS	Ministry of Community and Social Services
MCI	Ministry of Citizenship and Immigration
MET	Ministry of Education and Training (old)
MNN	Mid North Network for Adult Learning (also MNNAL)
MOL	Ministry of Labour
MOPP	Manual of Policies and Procedures (OLC)
MTCU	Ministry of Training, Colleges and Universities
MTML	Metro Toronto Movement for Literacy (Network)
MWP	Multiculturalism in the Workplace

N

NALD	National Adult Literacy Database
NLP	Ningwakwe Learning Press
NLS	National Literacy Secretariat
NOC	National Occupation Classification
NON	Network of Networks
NTAB	Niagara Training and Adjustment Board
NWD	No Wrong Door

O

OAHC	Ontario Association of Help Centres
OALCF	Ontario Adult Literacy Curriculum Framework
OAYEC	Ontario Association of Youth Employment Centres
OBS	Ontario Basic Skills
OBSW	Ontario Basic Skills in the Workplace
OCASI	Ontario Council of Agencies Serving Immigrants
OCCL	Ottawa-Carleton Coalition for Literacy (Network)
OCL	Ontario Community Literacy
ODSP	Ontario Disability Support Program
OISE	Ontario Institute for Studies in Education
OJIB	Ontario Jobs Investment Board
OLC	Ontario Literacy Coalition
OMAFRA	Ontario Ministry of Agriculture, Food and Rural Affairs
ONESTEP	Ontario Network of Employment Skills Training Project
ONLC	Ontario Native Literacy Coalition
OSSC	Ontario Secondary School Certificate
OSSD	Ontario Secondary School Diploma
OTEAC	Ontario Training and Education Action Coalition
OTIS	Online Training Information System
OW	Ontario Works
OYAP	Ontario Youth Apprenticeship Program

P

PHDALN	Peel/Halton/Dufferin Adult Learning Network
PLAR	Prior Learning and Assessment Recognition
PMF	Performance Management Framework
PRLN	Project READ Literacy Network

Q

QSAR	Quarterly Status and Adjustment Report
QUILL	Quality in Lifelong Learning (Network)

R

RALS	Recognition of Adult Learning System
RRE/RRTS	Rapid Re-Employment and Training Strategy

S

SAP	Self-Assessment Process
SAR	Social Assistance Recipient
SARAW	Speech Assisted Reading and Writing
SC	Service Canada
SCLN	Simcoe County Literacy Network
SDAG	Service Delivery Advisory Group
SEEN	Social Enterprise Employment Network
SIF	Sector Initiative Fund
SQS	Service Quality Standards
SRER	Statement of Revenue and Expenditure

T

TCLN	Tri-County Literacy Network
TDD	Telecommunication Devices for the Deaf
TESL	Teachers of English as a Second Language
TOEFL	Test of English as a Foreign Language
TOEIC	Test of English for International Communication
TOP	Trends, opportunities and priorities report (old) see LLMP
TQAA	Trades Qualification and Apprenticeship
ActTSP	Training Support System
TWS	Targeted Wage Subsidy

W

WCB	Workers Compensation Board (old) see WSIB
WSIB	Workplace Safety and Insurance Board
W/WEBS	Workplace/Workforce Employment Basic Skills (old)
WPB	Workplace Preparation Branch (old) - see MTCU

Y

YES	Youth Employment Services
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Appendix 2 - How to Be an Effective Coach for the New Program Coordinator

Good coaching and mentoring is a skill, and it's easy to get side-tracked if guidelines aren't adhered to in the mentoring process.

- Have an interest in the person you are about to coach; show some genuine concern for their concerns.
- Take an approach which enables the new program coordinator, one that is open and facilitative.
- Ask a lot of questions.
- Be easy to approach yourself, and show your confidence in the excellent job you do.
- **Don't blame or criticize anyone or any organization** - stay as neutral as possible in all matters which may be controversial, but give completely honest answers to any questions which arise.
- Be willing to consult, discuss and disagree.
- Continually provide constructive and positive feedback.
- **Don't help** so much that you are doing the work - step in only when someone is floundering or experiencing unnecessary frustration (avoid unhealthy dependence).

Once you and your Regional Network Coordinator have determined what you need in the mentoring process, here is a useful checklist to follow to get the most out of the mentoring experience:

1. Determine that the personal chemistry is right before you begin the process.
2. Make sure the understanding is very clear about what the purpose of the mentoring is, and what you hope to achieve before you enter into the relationship.
3. Make sure that both parties are committed to the relationship until the objectives are achieved; and have realistic expectations about the results, both in terms of time and changes which may take place.

Within the Regional Network, cultivating mentors is a part of the Succession Planning process. The issue of replacing coordinators in the literacy field has become increasingly serious, as populations age, as funding is in question and as shortages of trained literacy coordinators becomes evident. Whatever the replacement needs of an organization stem from; - retirement, transition etc. - considering the mentoring process as part of Succession Planning, which can help accomplish a smooth process with minimal disruption to the organization in question. In very small organizations having a structured approach to succession planning with mentoring as part of the process is unrealistic. This is where the Network has a critical role to play. As the umbrella organization which coordinates for the smaller organizations, it only makes sense to look ahead, to take an organized approach, by encouraging and facilitating the mentoring process. **The** Regional Network may find itself in the position where organizations are recruiting away from each other to fill internal positions. **The Network may also find itself in the position where it hasn't adequately identified its most** developed leaders. The Regional Network will need the cooperation of its member service providers to develop the mentoring process.

This will include:

- a. A commitment from the management of existing organizations and their boards to supporting the mentoring process as part of succession planning.
- b. A clear vision as to what skills will be needed in subsequent years, trends in literacy and Employment Ontario, and clear understanding of expectations.
- c. A realistic assessment of existing staff and their mobility (how many may be considering leaving; how many are ready, willing and able to mentor; what kind of database is there to identify key individuals, and who can access that information)
- d. Objective analysis of key staff and their willingness to be mentors.
- e. **Openness to potential mentors (don't limit it to "cream of the crop" - keep an open mind because really positive mentors are often found in the most retiring individuals).**
- f. A flexible development program allowing for interested parties to not only be identified, but to also allow for attending any in-house training, workshops, etc.

Appendix 3 - An Assessment Tool for Networks

The following is a list of qualities that network staff may wish to use to identify potential mentors and coaches within the network. This will be a beginning to building a database of individuals ready to help the new coordinator through the mentoring/coaching process. These qualities are suggestions, and can be easily adapted by the Network.

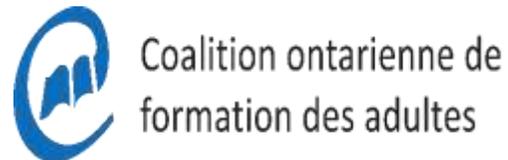
Check these qualities:

- I listen to the entire question / issue before responding.
- I have the time, or can make the time, to help.
- I know how to ask questions to get to the real problem / issue.
- I always give my honest opinion.
- I have a good range of networks and resources, and a solid knowledge base of literacy.
- I am not intimidating. I am easy to approach at any time.
- I know what I'm talking about. I'm good at my own job.
- I can assess the reality / conditions in which the new coordinator is working.
- I can focus clearly on the new coordinator's needs during a coaching session.
- I don't get irritated by a person who doesn't get the point immediately.
- I'm a positive role model in terms of my own work in literacy.
- I can help the new coordinator believe in their own potential.
- I am also open to new ideas, new ways of doing things.
- I know when to introduce options which may have not been considered, without overwhelming the new coordinator.
- I can challenge assumptions easily, gracefully, without causing anxiety.
- I am a positive person, an active listener, and non-judgmental.
- I am totally comfortable with having my own views challenged.
- I have a sound knowledge of the new developments in literacy, and development issues.
- I don't expect the new coordinator to be like me.
- I'm prepared to learn along with the new coordinator.
- I give feedback with tact and skill.
- I can allow the new coordinator the room, freedom and confidence to make mistakes.
- I have the ability to maintain detachment and objectivity.
- I'd like to see the person I'm mentoring make their own decisions wherever possible.
- The person I am coaching can express themselves to me freely and with confidence.
- I can draw out another person's ideas and help them to develop them.
- I have a real interest in helping others develop their skills.
- I don't talk about my own achievements too much, just where they are applicable.
- I have a genuine desire to see others experience success in their development.

(Adapted from: CRHC Human Resources Management: Coaching, Mentoring and Succession Planning)

Appendix 4

The EOIS-CaMS User Guide for New Staff



**CAMBRIAN
COLLEGE**

**EMPLOYMENT
ONTARIO**

This Employment Ontario project, program or service
is funded by the Ontario government.

The EOIS-CaMS

User Guide for New Staff

Disclaimer:

Please note that this user guide is intended as an **informal** guide for new users of EOIS-CaMS to help provide more details on the functionality of this system. All sites are expected to check EOPG on a regular basis (www.ontario.ca/eopg) for updates and changes to EOIS-CaMS, and are to consult with their MTCU consultant for decisions regarding best practices, guidelines, and contractual agreements. The creators of this guide are not responsible for any misinterpretation or misuse of this guide.

Note also that the EOIS system software and the associated resources mentioned in this Guide are upgraded/updated periodically. This Guide is based on the system version and resources available as of March 2016.

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Getting Started – Tools and Resources



First, you'll need to become familiar with MTCU's information website, "Employment Ontario Partner's Gateway", also known as "EOPG". <http://www.tcu.gov.on.ca/eng/eopg>

Here you will find helpful program tools and materials for the Employment Ontario Information System - Case Management Systems known as EOIS-CaMS. Below is an example of the latest information you can find under the *New Postings* heading:

The screenshot shows the website's navigation menu on the left and the main content area on the right. The navigation menu includes: Employment Ontario Partners' Gateway (dropdown), New Postings, Programs and Services, Stakeholder Engagement, Employment Ontario Leadership Awards, Employment Ontario Information Systems, Tools, and Site Map. Below this are various program categories like Postsecondary Education, Employment and Training, Ontario Job Bank, Labour Market Information, Popular Topics, Publications, Explore Government, Contact Us, and Features.

The main content area features a header with "EMPLOYMENT ONTARIO PARTNERS' GATEWAY" and a navigation bar with "HOME | POSTSECONDARY EDUCATION | EMPLOYMENT ONTARIO | ABOUT THE MINISTRY | NEWSROOM | CONNECT". Below the header is an "RSS GET STARTED" link. A yellow callout box points to this link with the text: "Click on RSS to add news feed to your desktop". Another yellow callout box points to the "New Postings" link in the navigation menu with the text: "Click on the New Postings tab or link for updates".

The main content area contains a welcome message: "Welcome to the Employment Ontario Partners Gateway. This site provides support to service providers delivering Employment Ontario programs and services as part of the Employment Ontario network. It provides tools and materials to support the Employment Ontario brand, and employment and training information within the Employment Ontario network of service providers." Below this is a link to "public" and a section titled "New Postings" with the text: "Check here for current announcements, forms, updates, FAQs – everything you need at your fingertips." Other sections include "Employment Ontario Transformation", "Programs and Services", and "Stakeholder Engagement".

HOME
|
POSTSECONDARY EDUCATION
|
EMPLOYMENT ONTARIO
|
ABOUT THE MINISTRY
|
NEWSROOM
|
CONNECT

Employment Ontario Partners' Gateway ▾

- ▶ New Postings
- ▶ Programs and Services
- ▶ Stakeholder Engagement
- ▶ Employment Ontario Leadership Awards
- ▶ Employment Ontario Information Systems
- ▶ Tools
- ▶ Site Map



New Postings

Check here for current announcements, forms, updates, FAQs - everything you need at your fingertips.

Stakeholder Engagement

- February 26, 2016: [ADM Letter to the EO Network: Call for nominations for the 2016 Employment Ontario \(EO\) Leadership Awards](#)
- February 24, 2016: [Get ready for the second annual EO Awards Ceremony!](#)
- February 18, 2016: [Signing Your Agreement Online](#)
- February 9, 2016: [Contract Management Processes for Employment Services \(ES\) and Literacy and Basic Skills \(LBS\) Program](#)
- February 4, 2016: [Certificate of Insurance - New Submission Requirement](#)
- January 27, 2016: [Parent Signature Requirement Clarification](#)

Canada-Ontario Job Grant (COJG)

- February 10, 2016: [COJG 2016-17 Budget Allocation Changes](#)

Employment Ontario Information System - Case Management System (EOIS-CAMS)

- February 16, 2016: [EOIS/R 2016-1 Bulletin](#)
- February 3, 2016: [SP Connect/2016-1 Bulletin](#)
- February 3, 2016: [Desk Aid: Signing Your Agreement Online \(PDF, 279 KB\)](#)

Literacy and Basic Skills (LBS)

All LBS updates are posted on the [LBS Updates page](#).

Postsecondary Education >

Employment and Training >

Ontario Job Bank >

Labour Market Information >

Popular Topics >

Publications >

Explore Government >

Contact Us >

Features ▾



OSAP

Latest information links

The next section that is really important to know is *Programs and Services*.



The screenshot shows the Employment Ontario Partners' Gateway website. The navigation menu on the left includes: Employment Ontario Partners' Gateway, New Postings, Programs and Services, Stakeholder Engagement, Employment Ontario Leadership Awards, Employment Ontario Information Systems, Tools, and Site Map. The main content area features a banner with the text "EMPLOYMENT ONTARIO PARTNERS' GATEWAY" and a person sitting on a ledge. Below the banner, the "New Postings" section is visible, with a callout box pointing to the "Programs and Services" link in the navigation menu. The callout box contains the text: "Click on the Programs and Services tab".

The link provides a list of programs and services available through Employment Ontario. For this Guide, we will be looking mainly at the Literacy and Basic Skills (LBS) Program.



The screenshot shows the Employment Ontario Partners' Gateway website. The navigation menu on the left includes: Employment Ontario Partners' Gateway, New Postings, Programs and Services, Stakeholder Engagement, Employment Ontario Leadership Awards, Employment Ontario Information Systems, and Tools. The main content area features a banner with the text "EMPLOYMENT ONTARIO PARTNERS' GATEWAY" and a person sitting on a ledge. Below the banner, the "Programs and Services" section is visible, with a callout box pointing to the "Literacy and Basic Skills (LBS)" link. The callout box contains the text: "Click on the LBS link".

This link will provide you with more LBS links such as updates, tools, administration and agreements, legislative obligations, business planning, etc.

- Employment Ontario Partners' Gateway** ▾
- ▶ New Postings
- ▶ Programs and Services
- ▶ Stakeholder Engagement
- ▶ Employment Ontario Leadership Awards
- ▶ Employment Ontario Information Systems
- ▶ Tools
- ▶ Site Map

- Postsecondary Education** >
- Employment and Training** >
- Ontario Job Bank** >
- Labour Market Information** >
- Popular Topics** >
- Publications** >
- Explore Government** >
- Contact Us** >
- Features** ▾


OSAP



Literacy and Basic Skills (LBS)

Overview of Literacy and Basic Skills

The Ontario Literacy and Basic Skills (LBS) program helps adults in Ontario to develop and apply communication, numeracy, interpersonal and digital skills to achieve their goals. The LBS program serves learners who have goals to successfully transition to employment, postsecondary, apprenticeship, secondary school, and increased independence. The program includes learners who may have a range of barriers to learning.

The [Ontario Adult Literacy Curriculum Framework \(OALCF\)](#) is the cornerstone of Employment Ontario's LBS Program, helping adults to achieve their goals of further education, work, and independence. The OALCF is a competency-based framework that supports the development of adult literacy programming delivered through the Literacy and Basic Skills (LBS) Program.

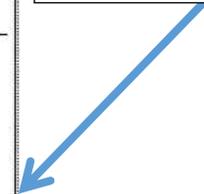
Through the LBS Program, individuals access five services that contribute to the successful completion of a learner plan. Service providers may focus on preparing learners for different goal paths but each learner, regardless of the focus of the service provider's programming, receives the same five services:

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

Other LBS resources:

- [LBS Updates](#)
- [Additional Tools](#)
- [Administration & Agreements](#)
- [Business Planning](#)
- [Legislative Obligations](#)
- [Literacy and Basic Skills Program](#)
- [Performance Management](#)
- [Regional Network Literacy Service Planning](#)
- [The Ontario Adult Literacy Curriculum Framework \(OALCF\)](#)

Latest LBS links



The next section is called *Stakeholder Engagement*, which provides latest Ministry requirements and information related to the broader Employment Ontario network, i.e. not just relevant to LBS or any other individual EO program.

HOME | POSTSECONDARY EDUCATION | EMPLOYMENT ONTARIO | ABOUT THE MINISTRY | NEWSROOM | CONNECT

Employment Ontario Partners' Gateway

- ▶ New Postings
- ▶ Programs and Services
- ▶ Stakeholder Engagement
- ▶ Employment Ontario Leadership Awards
- ▶ Employment Ontario Information Systems
- ▶ Tools
- ▶ Site Map

Postsecondary Education >

Employment and Training >

Ontario Job Bank >

Labour Market Information >

Popular Topics >

Click on Stakeholder Engagement

EMPLOYMENT ONTARIO
PARTNERS' GATEWAY

New Postings

Check here for current announcements, forms, updates, FAQs - everything you need at your fingertips.

Stakeholder Engagement

- March 11, 2016: [ADM Letter to the EO Network: New consolidated Visual Identity and Communications Guidelines for Employment Ontario Service Providers](#)
- February 26, 2016: [ADM Letter to the EO Network: Call for nominations for the 2016 Employment Ontario \(EO\) Leadership Awards](#)
- February 24, 2016: [Get ready for the second annual EO Awards Ceremony!](#)
- February 18, 2016: [Signing Your Agreement Online](#)
- February 9, 2016: [Contract Management Processes for Employment Services \(ES\) and Literacy and Basic Skills \(LBS\) Program](#)
- February 4, 2016: [Certificate of Insurance – New Submission Requirement](#)
- January 27, 2016: [Parent Signature Requirement Clarification](#)

The next important tab is the *Employment Ontario Information System*. The following resources will appear:

HOME | POSTSECONDARY EDUCATION | EMPLOYMENT ONTARIO | ABOUT THE MINISTRY | NEWSROOM | CONNECT

Employment Ontario Partners' Gateway

- ▶ New Postings
- ▶ Programs and Services
- ▶ Stakeholder Engagement
- ▶ Employment Ontario Leadership Awards
- ▶ **Employment Ontario Information Systems**
- ▶ Tools
- ▶ Site Map

Postsecondary Education >

Employment and Training >

Ontario Job Bank >

Labour Market Information >

Popular Topics >

Publications >

Explore Government >

ONTARIO PARTNERS' GATEWAY

Employment Ontario Information System

The Ontario Ministry of Training, Colleges and Universities (MTCU) continues with the transformation of Employment Ontario (EO) to a customer focused, integrated service delivery network committed to delivering high-quality employment programs and services across Ontario.

To support this initiative, the Employment Ontario Information System (EOIS) Project was established to develop and implement computer systems to support the administration of EO programs and services.

EOIS is not a single, stand-alone system but an 'umbrella' term used to describe a combination of various computer systems that will be responsible for supporting the administration of Employment Ontario programs and services.

Stakeholder access to the various programs within EOIS is through the Government of Ontario's secure online registration service, *ONE-key*. *ONE-key* verifies identity and authorizes secure access.

The first time you use the *ONE-key* security system, you will need to create an account, establishing your unique *ONE-key* ID and password. This is a one-time process. In future, the only security information you will need to access EOIS online is your *ONE-key* ID and password. Access to the various programs within EOIS and authentication codes.

EOIS is composed of the following systems:

- [Employment Ontario Information System - Apprenticeship \(EOIS-APPR\)](#)
- [Employment Ontario Information System - Case Management System \(EOIS-CAMS\)](#)
- [Employment Ontario Information System - Service Provider Connect \(EOIS-SP Connect\)](#)

Click on Employment Ontario Information Systems (EOIS)

Then click on EOIS-CaMS

The following screen will appear:

Ontario
MINISTRY OF TRAINING, COLLEGES AND UNIVERSITIES

Ontario.ca | Français

Search

HOME | POSTSECONDARY EDUCATION | EMPLOYMENT ONTARIO | ABOUT THE MINISTRY | NEWSROOM | CONNECT

Employment Ontario Partners' Gateway

- ▶ New Postings
- ▶ Programs and Services
- ▶ Stakeholder Engagement
- ▶ Employment Ontario Leadership Awards
- ▶ Employment Ontario Information Systems
- ▶ Tools
- ▶ Site Map

Postsecondary Education

EMPLOYMENT ONTARIO
PARTNERS' GATEWAY

Employment Ontario Information System - Case Management System (EOIS-CAMS)

- [Guides and Resources](#)
- [Training](#)
- [User Management](#)
- [Communications](#)

NOTE: all users who will be given access to EOIS-CaMS must complete the Service Provider Staff EOIS-CaMS registration form and complete the mandatory system training including online modules prior to accessing the EOIS-CaMS system.
Here is the direct URL for the training modules:
http://www.tcu.gov.on.ca/eng/eopg/eotransformation/eois-cams_training.html

Useful tips are found under [Guides and Resources](#). You will find Service Provider User Guide, Desk Aids for CaMS and Details Reporting User Guides and EOIS/Reports Desk Aid
Here is the direct URL link:
http://www.tcu.gov.on.ca/eng/eopg/eotransformation/eois-cams_guides.html

Click on [User Management](#) for information on how to set-up users in CAMS and in ONE-key (re: access, username/passwords, etc...)
Here is the URL for the user management resources:
http://www.tcu.gov.on.ca/eng/eopg/eotransformation/eois-cams_user_mgt.html

This *EOIS-CaMS User Management* section contains relevant resources and URL links on how to set-up and maintain user accounts in CaMS.

The screenshot shows the website's navigation menu and a central content area. The navigation menu includes: HOME | POSTSECONDARY EDUCATION | EMPLOYMENT ONTARIO | ABOUT THE MINISTRY | NEWSROOM | CONNECT. The main content area is titled "Employment Ontario Information System - CaMS (EOIS-CAMS) User Management".

Employment Ontario Partners'

Select this link to download form to maintain SPRA (Service Provider Registration Authority) info and/or request SP (Service Provider) connect for designated SPRA
http://www.tcu.gov.on.ca/eng/eopg/publications/spra_admin_form.pdf

Select this link to download PDF form to register a SPRA
http://www.tcu.gov.on.ca/eng/eopg/publications/eois_spra_cams_spc.pdf

Stakeholder Engagement

Employment Ontario Leadership Awards

Employment Ontario Information Systems

Tools

Site Map

Postsecondary Education

Employment and Training

Ontario Job Bank

Labour Market Information

Employment Ontario Information System - CaMS (EOIS-CAMS)

User Management

Contained in this section are all the relevant resources (user guides, forms) that will be required to set up and maintain user accounts in CaMS.

- [SPRA Administration Form EOIS-CaMS](#) (May 12, 2015) (PDF, 89 KB)
- [Service Provider Registration Authority \(SPRA\) EOIS Registration](#) (April 2015) (PDF, 159 KB)
- [Service Provider Staff EOIS-CaMS Registration](#) (PDF, 159 KB)
- [Service Provider Staff Administration Form EOIS-CaMS](#) (PDF, 1,142 KB)
- [EOIS-CaMS Service Provider User Management Guide](#) (May 2015) (PDF, 1,344 KB)
- [EOIS-CaMS ONE-key User Guide](#) (May 2011) (PDF, 1,344 KB)

Select this link to download PDF form to administer (inactivate/maintain) access to CaMS.
http://www.tcu.gov.on.ca/eng/eopg/publications/87-1723E-sp_staff_registration.pdf

Select this link to download PDF form to register staff who will be accessing CaMS.
http://www.tcu.gov.on.ca/eng/eopg/publications/87-1723E-sp_staff_registration.pdf

Select this link to download PDF form to administer (inactivate/maintain) access to CaMS.
http://www.tcu.gov.on.ca/eng/eopg/publications/87-1727e-service_support_provider-admin.pdf

Steps on how to register in the One-key Service Ontario portal and URL link to the secure MTCU portal
http://www.tcu.gov.on.ca/eng/eopg/publications/cams_one-key_user_guide.pdf
<https://www.iaa.gov.on.ca/iaalogin/IAALogin.jsp>

Steps on how to select and register SPRAs and service provider staff for your LBS program (refer to your license and user account allocations for limits)
https://www.tcu.gov.on.ca/eng/eopg/publications/cams_sp_user_manage_guide.pdf

Getting Signed Up and Registered in EOIS-CaMS



First, your organization will need to designate and register two Service Provider Registration Authority (SPRA's) who will then set-up and register other service provider staff for your organization. The SPRA's will need to meet face to face with MTCU's Local Registration Authority (LRA). At this meeting identification is verified, and registration forms are reviewed and then processed for approval by the local MTCU office.

Each SPRA will then receive notification by two successive email messages that his/her user account is set-up. The first email will contain the Enrolment ID Number and a link to the government's "ONE-key" log-in page. The second email will follow 48 hours later and will contain the EOIS-CaMS Private Identification Number (PIN).

Here's what the SPRA will need to do to set up access in EOIS-CaMS:

Click on the ONE-key link: <https://www.iaa.gov.on.ca/iaalogin/IAALogin.jsp> SAVE this link in your web browser's "Favourites".

Ontario ONE-key

HELP | ServiceOntario

Sign in

Sign in with your ONE-key ID

New to ONE-key?
A ONE-key account gives you secure access to Ontario Government programs and services. [Learn more](#)

Don't have a ONE-key ID? [Sign up now!](#)

ONE-key ID:

Password:

Sign in

Can't access your account?

CONTACT US | ACCESSIBILITY | PRIVACY | HELP

© QUEEN'S PRINTER FOR ONTARIO, 2009 - 2011 | IMPORTANT NOTICES

Sign up, create a username (ONE-key ID), enter the PIN number you were provided in the second email, and create your recovery questions.

[Help](#) | [ServiceOntario](#) | [About Ontario](#)

ONE-key Account Registration

Create your ID and Password (*) indicates a mandatory field

* Choose your ONE-key ID:

* Password:

* Confirm your password:

* I accept the [Terms and Conditions of Use](#) and I have reviewed the [Notice of Collection](#)

Need assistance? Please call ServiceOntario at 416-326-1234 (GTA) or 1-800-267-8097

Password Recovery Info (*) indicates a mandatory field

If you forget your password you can create a new one, after answering a set of security questions. Create your own set of security questions and answers below.

* Security Question 1: -- Select a question --

* Question 1 Answer:

* Security Question 2: -- Select a question --

* Question 2 Answer:

* Security Question 3: -- Select a question --

* Question 3 Answer:

Optional ID Recovery Info

By providing your email address you can recover your ONE-key ID in case you forget it. You can enter your email address at a later date if you do not want to provide it now, via the Change Account Recovery Info option.

Email Address:

Review the confirmation and click Continue.



[Help](#) | [Logout](#)

ONE-key Account Registration

Confirmation

You have successfully registered your ONE-key account. Your ONE-key ID is **eoiscamsuser**.

A confirmation email will be sent to **eoiscamsuser@gm.com**

ONE-key gives you secure access to Ontario Government online services. You can login at any time on the ONE-key portal to manage your ONE-key account (change ID, change password, change language preferences, etc.) and to enrol for accessing the available online services.

Please print this page for your records and store it in a secure manner. Do not share your ONE-key ID or password with anybody.

Now you will enroll in the EOIS-CaMS system. The applicable services will be displayed according to your assigned user role:

Help | Logout

One-Key Account

- My Services
- Manage my Account
- Logout

Available Services

- Business Services
- Personal Services
- Services by Category >
- All Services from A to Z

Find Available Services

Start typing to search...

All Services from A to Z

OneKey has made several changes. [Find out more](#)

Select a link below to enrol for service(s) access. After completing the enrolment you can access the service from the My Services list, for future visits.

- Accessibility Compliance Reporting (ACR)
- Child Care Licensing System
- Developmental Services Consolidated Information System (DS-CIS)
- EOIS - SP Connect
- EOIS-APPR - Module: Employer
- EOIS-APPR - School Board
- EOIS-APPR - Training Delivery Agent
- EOIS-CaMS - Application
- EOIS-CaMS - Reporting
- FRQ Online
- Grants Ontario System
- Ministry of Natural Resources Registry for Business
- Ministry of Natural Resources Registry for Individuals
- My Account - eNotification
- OCL Portal
- ONT-TAXS online
- OSAP FAQ Information Portal
- OSAP FAQ Services - Advanced Services
- OSAP FAQ Services - General Services
- Ontario's Pest Portal
- Opportunities Ontario: Provincial Nominee Program (OPNP)
- QuARTS - Qualification and Registration Tracking System for Building Practitioners
- SWMC Extranet and WISKI Web Pro
- Service Provider Network Compensation
- ServiceOntario Account
- Social Assistance Online
- Transition Aged Youth System
- Vital Statistic Applications

Enter the Enrolment Number from your first email and select SUBMIT.

Ontario

OneKey

ABOUT EMPLOYMENT ONTARIO | ONE-KEY PORTAL | LOGOUT

Employment Ontario Information System (EOIS)

You are about to enrol for online access to EOIS.

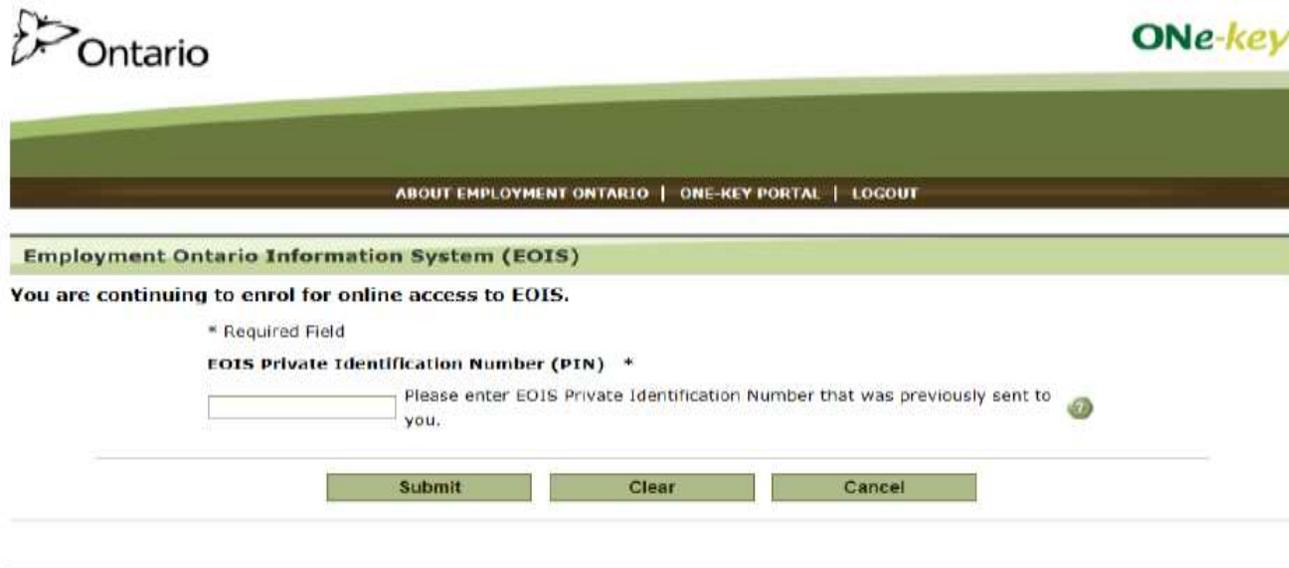
* Required Field

EOIS Enrolment Number *

Please enter the EOIS Enrolment Number that was previously sent to you.

Submit Clear Cancel

Enter your PIN from your second email and select **SUBMIT**.



ABOUT EMPLOYMENT ONTARIO | ONE-KEY PORTAL | LOGOUT

Employment Ontario Information System (EOIS)

You are continuing to enrol for online access to EOIS.

* Required Field

EOIS Private Identification Number (PIN) *

Please enter EOIS Private Identification Number that was previously sent to you. 

It will take a moment to load the EOIS-CaMS Home page, **DO NOT** use the refresh button while you are waiting.

Read the Terms and Conditions and click “I agree”.

Breach of Terms and Conditions

14. I will cooperate with the Ministry and its contractors or auditors in any investigation into a breach of Conditions and the privacy and security provisions of the Service Provider's agreement with the Ministry.

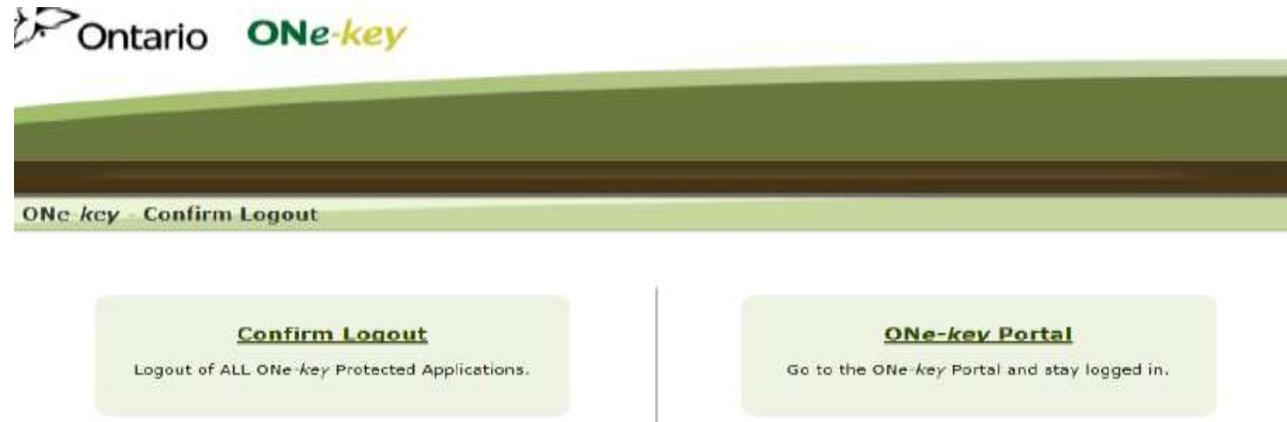
Revocation of Access to EOIS

15. The Ministry may revoke my access to EOIS for any reason, including a breach of these Terms and Conditions, with notice to me and without liability to me.

Modification of Terms and Conditions

16. These terms and conditions may be amended from time to time by the Ministry upon notice to me as a Service Provider and such changes will be posted at www.eopg.ca.

To exit, select Confirm Logout.



To access again the ONe-key Portal after registration, use the following URL to connect: <https://www.iaa.gov.on.ca/iaalogin/IAALogin.jsp>
 The following screen will display. "DO NOT USE SIGN UP NOW" since you've already registered in the ONe-key portal.
 Enter your username (or ONe-key ID) and PIN.



Select the appropriate services required. For entering student data, select EOIS-CaMS – Application.

The screenshot shows the Ontario ONE-key portal interface. At the top left is the Ontario logo and 'ONE-key' text. At the top right, it says 'Français'. Below the header, there is a navigation bar with 'Help' and 'Logout' links. The main content area is titled 'My Services' and includes a welcome message, a 'Find out more' link, and a list of services. The left sidebar contains a menu with 'My Services', 'Manage my Account', 'Logout', and 'Available Services' (with sub-categories: Business Services, Personal Services, Services by Category).

Welcome, xxxxxxxxxxxx
Last Login: 02:08PM 10 Dec 2015

Help | Logout

ONE-key Account

- My Services
- Manage my Account
- Logout

Available Services

- Business Services
- Personal Services
- Services by Category >

My Services

ONE-key has made several changes. [Find out more](#)

You currently have access to the service(s) listed below.

You can enrol for accessing additional services from the Available Services menu, on the left side of the screen.

- EOIS - SP Connect
- EOIS-CaMS - Reporting
- EOIS-CaMS - Application
- EOIS-CaMS - Training

Enter your PIN:

The screenshot shows the 'Employment Ontario Information System (EOIS)' enrolment form. A blue arrow points from the text 'Enter your PIN:' to the 'EOIS Private Identification Number (PIN)' input field. The form includes a 'Submit' button, a 'Clear' button, and a 'Cancel' button.

Ontario ONE-key

ABOUT EMPLOYMENT ONTARIO | ONE-KEY PORTAL | LOGOUT

Employment Ontario Information System (EOIS)

You are continuing to enrol for online access to EOIS.

* Required Field

EOIS Private Identification Number (PIN) *

Please enter EOIS Private Identification Number that was previously sent to you.

Submit Clear Cancel

You will now be logged into the EOIS-CaMS system. For example, below is snapshot of the Application menu in EOIS-CaMS.

The screenshot displays the EOIS-CaMS application interface. At the top left is the Ontario logo. The main header reads "CASE MANAGEMENT SYSTEM - SERVICE PROVIDER MANAGER APPLICATION". On the right side of the header, there are links for "Preferences", "Log out", and a help icon. Below the header is a navigation bar with tabs for "Workspace", "Cases and Outcomes", "Tasks", and "Calendar". To the right of the navigation bar is a search box labeled "Enter Reference Number". Below the navigation bar is a green banner with the text "Welcome to the EOIS Case Management System" and a refresh icon. Below the banner is a section titled "My Shortcuts" with a dropdown arrow. The shortcuts listed are: [Create a New Case](#), [Create a New Employer](#), [My Service Provider](#), [Pending Reviews](#), [Reassign Cases](#), [Reassign Reviews](#), [Search for a Case](#), [Search for an Application](#), [Search for a COJG Application](#), [Search for a Corporate Entity](#), [Search for an Employer](#), [View My Bookmarks](#), and [View My Cases](#).

The following section outlines the steps to access SP Connect, which is the financial and contract management application within EOIS. You will see that the process is similar to registering for EOIS-CaMS access.

Getting Signed Up and Registered in EOIS-SP Connect



As of June 15, 2015, a new EOIS-SP Connect features gives service providers on-line access to either view and/or submit financial information such as payment schedules, site targets and allocations for legal agreements. Estimate of Expenditure Reports (EER) and Business Plans are also submitted via the EOIS-SP Connect. You may or may not need to access SP Connect, depending on your role in the organization.

As illustrated earlier, the Employment Ontario Information Systems link will assist your SPRA in setting up SP Connect users' access as either a Service Provider Submission Authority (SPSA), and/or as a Service Provider Administrator (SPA)

Employment Ontario Partners' Gateway

- New Postings
- Programs and Services
- Stakeholder Engagement
- Employment Ontario Leadership Awards
- Employment Ontario Information Systems**
- Tools
- Site Map

Employment Ontario Information System

The Ontario Ministry of Training, Colleges and Universities (MTCU) continues with the transformation of Employment Ontario (EO) to a customer focused, integrated service delivery network committed to delivering high-quality employment programs and services across Ontario.

To support this initiative, the Employment Ontario Information System (EOIS) Project was established to develop and implement computer systems to support the administration of EO programs and services.

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Stakeholder access to the various programs within EOIS is through the Government of Ontario's secure online registration service, *ONE-key*. *ONE-key* verifies identity and authorizes secure access.

The first time you use the *ONE-key* security system, you will need to create an account, establishing your unique *ONE-key* ID and password. This is a one-time process. In future, the only security information you will need to access EOIS online is your *ONE-key* ID and password. Access to the various programs within EOIS will require enrolment and authentication codes.

EOIS is composed of the following systems:

- [Employment Ontario Information System - Apprenticeship \(EOIS-APPR\)](#)
- [Employment Ontario Information System - Case Management System \(EOIS-CAMS\)](#)
- [Employment Ontario Information System - Service Provider Connect \(EOIS-SP Connect\)](#)

Click on EOIS-SP Connect link

The following screen will appear:

HOME | POSTSECONDARY EDUCATION | EMPLOYMENT ONTARIO | ABOUT THE MINISTRY | NEWSROOM | CONNECT

Employment Ontario Partners' Gateway

- ▶ New Postings
- ▶ Programs and Services
- ▶ Stakeholder Engagement
- ▶ Employment Ontario Leadership Awards
- ▶ Employment Ontario Information Systems
- ▶ Tools
- ▶ Site Map

Postsecondary Education >

Employment and Training >

Ontario Job Bank >

Labour Market Information >

EMPLOYMENT ONTARIO PARTNERS' GATEWAY

Employment Ontario Information System - SP Connect

Guides and Resources

- February 2016: [Desk Aid: Signing Your Agreement Online](#) (PDF, 279 KB)
- June 2015: [Start-Up Kit](#) (PDF, 374 KB)
- March 2016: [Chapter 1: Introduction and Navigation](#) (PDF, 610 KB)
- March 2016: [Chapter 2: Agreements Management](#) (PDF, 1136 KB)
- June 2015: [Chapter 3: Monitoring](#) (PDF, 563 KB)
- March 2016: [Chapter 4: Service Provider Management](#) (PDF, 637 KB)
- March 2016: [Chapter 5: Business Plan Management](#) (PDF, 1,566 KB)

Click on Start-Up Kit for details on how your SPRA needs to grant the SP connect user roles using EOIS-CaMS system

Here are the initial steps the SPRA will need in the EOIS system to set-up SP connect user access. The SPRA will need to log into ONE-key and EOIS as usual, then select the EOIS-CaMS – Application link.

ONE-key Account

- My Services
- Manage my Account
- Logout

Available Services

- Business Services
- Personal Services

My Services

ONE-key has made several changes. [Find out more](#)

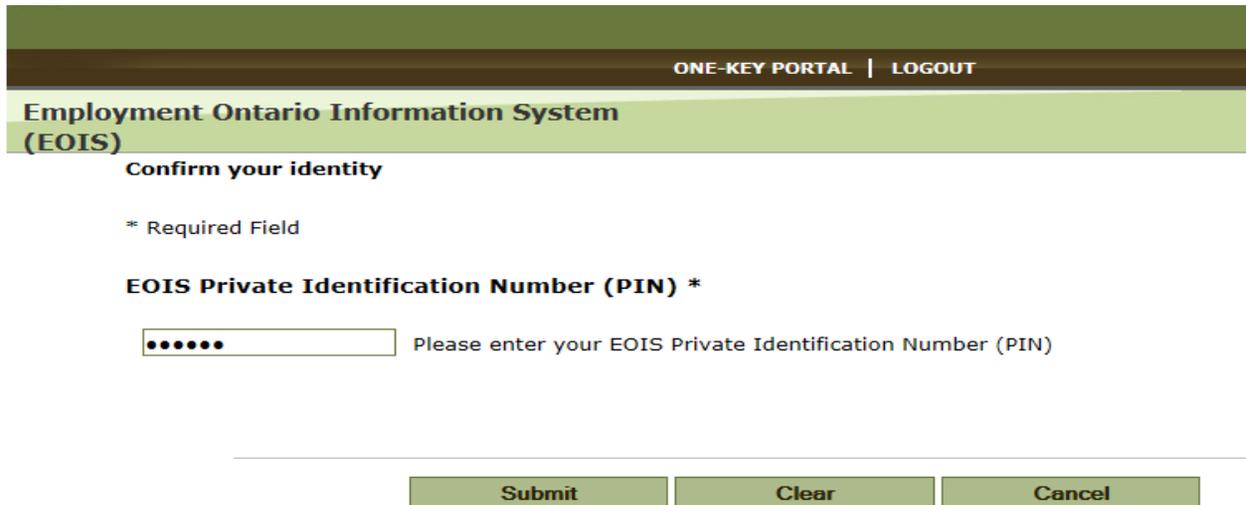
You currently have access to the service(s) listed below.

You can enrol for accessing additional services from the Available Services menu, on the left side of the screen.

- [EOIS-CaMS - Application](#)
- [EOIS-CaMS - Reporting](#)
- [EOIS-CaMS - Training](#)

Choose the EOIS-CaMS Application link

Then the SPRA will need to enter his/her EOIS PIN and click Submit:



ONE-KEY PORTAL | LOGOUT

Employment Ontario Information System (EOIS)

Confirm your identity

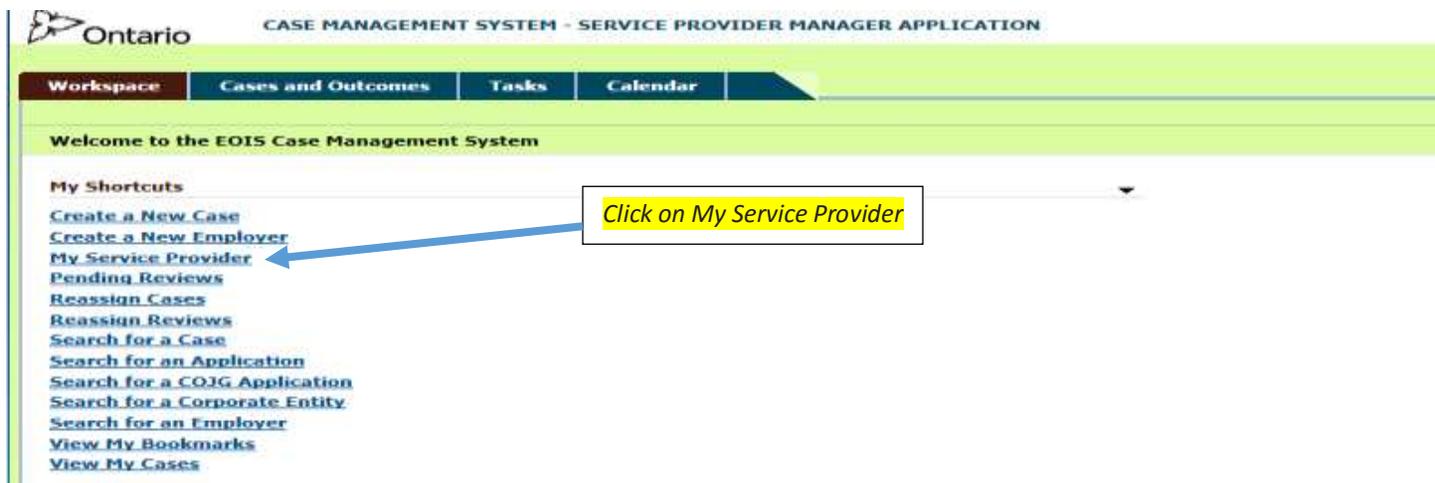
* Required Field

EOIS Private Identification Number (PIN) *

Please enter your EOIS Private Identification Number (PIN)

Submit **Clear** **Cancel**

Then, from the menu below, click on “My Service Provider”:



Ontario CASE MANAGEMENT SYSTEM - SERVICE PROVIDER MANAGER APPLICATION

Workspace Cases and Outcomes Tasks Calendar

Welcome to the EOIS Case Management System

My Shortcuts

- [Create a New Case](#)
- [Create a New Employer](#)
- [My Service Provider](#)
- [Pending Reviews](#)
- [Reassign Cases](#)
- [Reassign Reviews](#)
- [Search for a Case](#)
- [Search for an Application](#)
- [Search for a COIG Application](#)
- [Search for a Corporate Entity](#)
- [Search for an Employer](#)
- [View My Bookmarks](#)
- [View My Cases](#)

Click on My Service Provider

The following screen will appear. Click on the “Service Provider Members” tab:

The screenshot shows the EOIS-CaMS interface with the 'Service Provider Members' tab selected. The interface includes a navigation bar with 'Workspace', 'Cases and Outcomes', 'Tasks', and 'Calendar'. Below the navigation bar, there is a search bar labeled 'Enter Reference Number'. The main content area displays a form for a service provider with the following fields:

- Legal Name
- Business Name
- Preferred Language: English
- Max Number of Users: 37
- Reference Number
- Provider Status: Active
- Geographic Region
- License Allocation: 21

Below the form, there are three tabs: 'Home', 'Service Provider Members', and 'Contact'. The 'Service Provider Members' tab is selected. The content under this tab includes a 'Service Provider Home' section with fields for 'IFIS Supplier Site', 'Legal Name', 'Supplier Number', 'Supplier Site Name', and 'IFIS Status: Active'. There is also a 'Details' section with fields for 'Business Name', 'Preferred Language: English', 'CRA Business Number', 'NAICS Code', 'Max Number of Users: 37', 'Reference Number', 'Preferred Communication: Hard Copy', 'Sector: College', 'Provider Status: Active', 'Geographic Region', and 'License Allocation: 21'. A 'Contact Details' section is also visible at the bottom.

A list of your existing CaMS users will appear, click on “New” button to add a new Service Provider Member:

The screenshot shows the EOIS-CaMS interface with the 'Service Provider Members' tab selected. The interface includes a navigation bar with 'Workspace', 'Cases and Outcomes', 'Tasks', and 'Calendar'. Below the navigation bar, there is a search bar labeled 'Enter Reference Number'. The main content area displays a form for a service provider with the following fields:

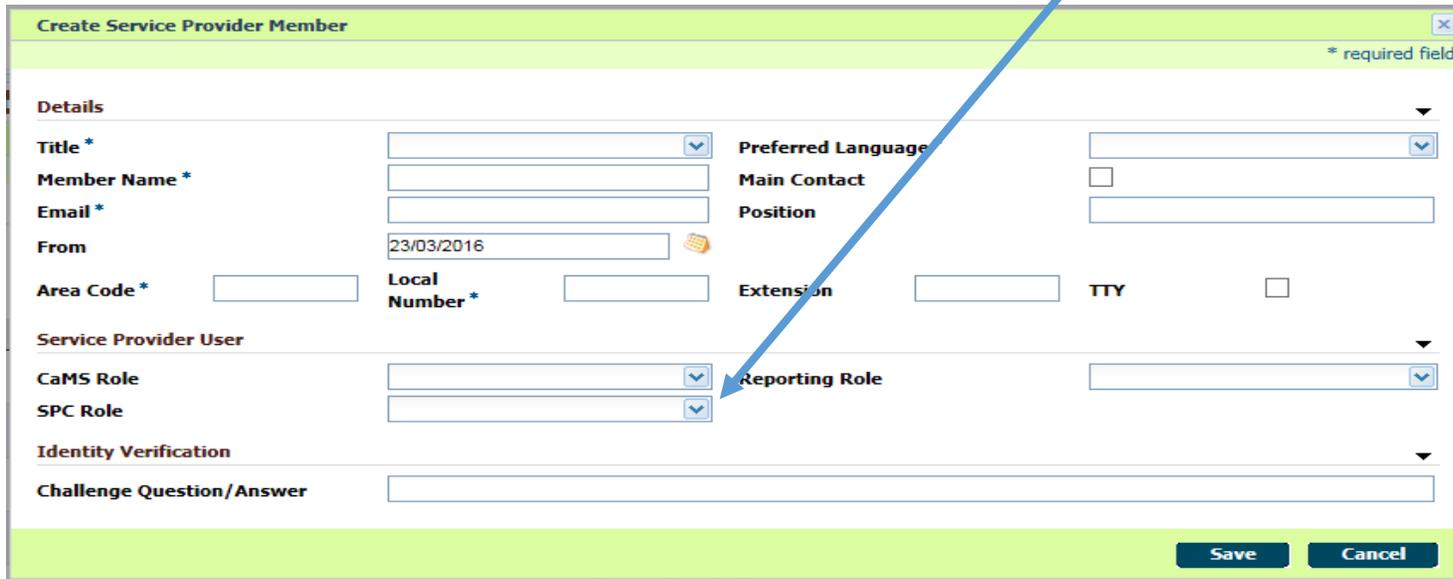
- Legal Name
- Business Name
- Preferred Language: English
- Max Number of Users: 37
- Reference Number
- Provider Status: Active
- Geographic Region
- License Allocation

Below the form, there are three tabs: 'Home', 'Service Provider Members', and 'Contact'. The 'Service Provider Members' tab is selected. The content under this tab includes a 'Service Provider Members' section with a 'Search Criteria' dropdown and a 'Display Inactive Members' checkbox. There are 'Search' and 'Reset' buttons. Below the search area, there is a table listing existing CaMS users:

Name	Position	Main Contact	CaMS Role	Reporting Role	SPC Role	Status
Alan	Employment Consultant	No	Service Provider Case Worker	SP Staff		Active
Anaels	Employment Consultant	No	Service Provider Administrator	SP Staff	SP Administrator	Active
Anaels	Academic Advisor	No	Service Provider Case Worker	SP Staff		Active

A blue arrow points to the 'New' button in the top right corner of the 'Service Provider Members' section.

The following screen will appear. Complete this form and select the appropriate SP Connect user role (Service Provider Administrator or Service Provider Submission Authority). By assigning an SP Connect role, the user will have the corresponding level of access. Then “SAVE” the form.



Create Service Provider Member ✕

* required field

Details

Title *	<input type="text"/>	Preferred Language	<input type="text"/>
Member Name *	<input type="text"/>	Main Contact	<input type="checkbox"/>
Email *	<input type="text"/>	Position	<input type="text"/>
From	<input type="text" value="23/03/2016"/>		
Area Code *	<input type="text"/>	Local Number *	<input type="text"/>
		Extension	<input type="text"/>
		TTY	<input type="checkbox"/>

Service Provider User

CaMS Role	<input type="text"/>	Reporting Role	<input type="text"/>
SPC Role	<input type="text"/>		

Identity Verification

Challenge Question/Answer

Save **Cancel**

Once saved, the system will auto-generate two MTCU emails for the new user. The first email will contain the EOIS Enrolment number. The second email, which will be within 48 hours, will contain the Private Identification Number (PIN) number. Once you have received both emails, follow the steps below to register in the government’s ONE-key site.

Click on the ONE-key link: <https://www.iaa.gov.on.ca/iaalogin/IAALogin.jsp>? SAVE this link in your web browser’s “Favourites”.

The following screen will appear:

Ontario **ONE-key**

HELP | ServiceOntario | About Ontario

Sign in

Sign in with your ONE-key ID

New to ONE-key?
A ONE-key account gives you secure access to Ontario Government programs and services. [Learn more](#)

Don't have a ONE-key ID? [Sign up now!](#)

ONE-key ID:
Password:

Sign in

Can't access your account?

CONTACT US | ACCESSIBILITY | PRIVACY | HELP

© QUEEN'S PRINTER FOR ONTARIO, 2008 - 2012 | IMPORTANT NOTICES

NOTE: if you already have a ONE-key account, you don't have to sign-up again. Simply enter your ONE-key ID and Password and select the EOIS-SP Connect service.

Once you are signed up, have created a username (ONE-Key ID), entered password and created recovery questions, all services will be displayed,

Select EOIS-SP Connect:

Help | Logout

One-key Account

My Services

Manage my Account

Logout

Available Services:

Business Services

Personal Services

Services by Category >

All Services from A to Z

Find Available Services ?

Start typing to search...

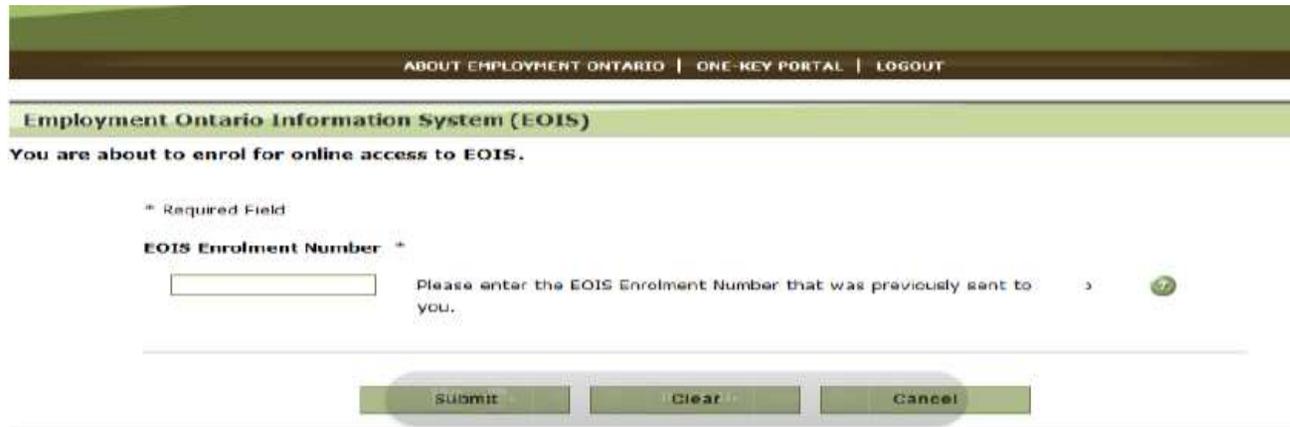
All Services from A to Z

one-key has made several changes. [Find out more](#)

Select a link below to enrol for service(s) access. After completing the enrolment you can access the service from the My Services list, for future visits.

- Accessibility Compliance Reporting (ACS)
- Child Care Licensing System
- Developmental Services Consolidated Information System (DSCIG)
- EOIS-APPS - Modular Employer
- EOIS-APPS - School Board
- EOIS-APPS - Training Delivery Agent
- EOIS-CaMS - Application
- EOIS-Info - Reporting
- **EOIS - SP Connect**
- Grants Ontario System
- Ministry of Natural Resources Registry for Business
- Ministry of Natural Resources Registry for Individuals
- My Account - attestation
- OCL Portal
- ONT-TAXS online
- ONE-Source for Business
- OSAP-FAQ Information Portal
- OSAP-FAQ Services - Advanced Services
- OSAP-FAQ Services - General Services
- Ontario's Past Portal
- Opportunities Ontario - Provincial Nominee Program (OPNP)
- SWMC Extranet and WISKI Web Pro
- Service Provider Network Compensation
- Social Assistance Online
- Transition Aged Youth System
- Vital Statistics Applications

Now enter the EOIS enrolment number that was sent to you in the first email:



ABOUT EMPLOYMENT ONTARIO | ONE-KEY PORTAL | LOGOUT

Employment Ontario Information System (EOIS)

You are about to enrol for online access to EOIS.

* Required Field

EOIS Enrolment Number *

Please enter the EOIS Enrolment Number that was previously sent to you. 

Then enter the EOIS PIN that was sent to you in the second email:



 Ontario **ONE-key**

ONE-KEY PORTAL | LOGOUT

Employment Ontario Information System (EOIS)

Confirm your identity

* Required Field

EOIS Private Identification Number (PIN) *

Please enter your EOIS Private Identification Number (PIN) 

You will be then directed to the EOIS-SP Connect Home Page.

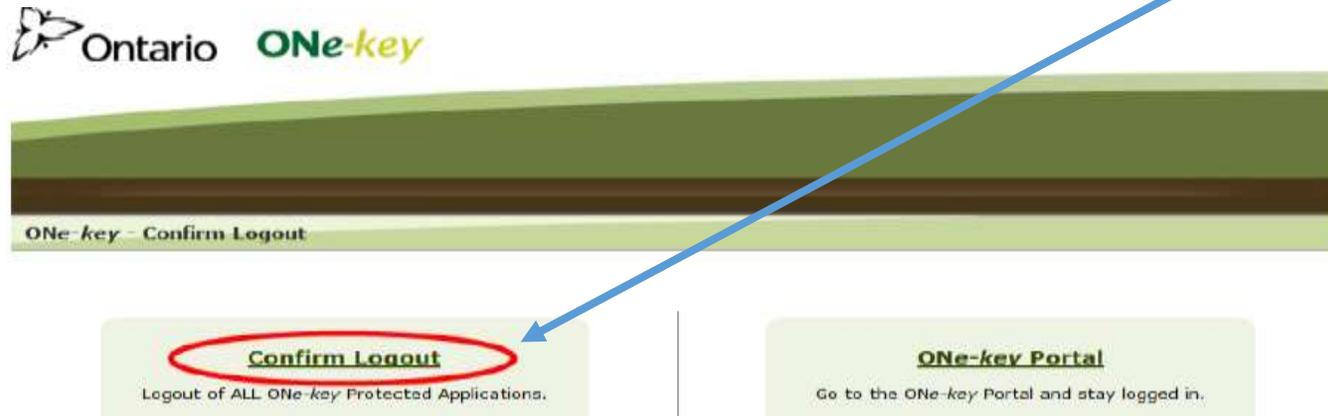
NOTE: it will take a moment to access this page. DO NOT USE the Refresh button in your browser while you wait. The following pages will appear.



For security purposes, you must log-out of EOIS-SP Connect by using the LOGOUT feature.



Once you have successfully logged out of EOIS-SP Connect, you will then need to confirm your logout from the **ONE-key Portal**.



Now that you're all set up and familiar with the EOIS, we will show key points for navigation, searches, entering service plans, entering sub-goals and plan items, entering information and referrals, aggregate data, closing files, completing reviews and accessing reports. All of these processes

Navigating and Searching



We will refer again to a previously discussed URL in the EOPG site: <http://www.tcu.gov.on.ca/eng/eopg/eotransformation/eois-cams.html>

Ontario
MINISTRY OF TRAINING, COLLEGES AND UNIVERSITIES

Ontario.ca | Français

Search

HOME | POSTSECONDARY EDUCATION | EMPLOYMENT ONTARIO | ABOUT THE MINISTRY | NEWSROOM | CONNECT

Employment Ontario Partners' Gateway

- ▶ New Postings
- ▶ Programs and Services
- ▶ Stakeholder Engagement
- ▶ Employment Ontario Leadership Awards
- ▶ Employment Ontario Information Systems
- ▶ Tools
- ▶ Site Map

Postsecondary Education

EMPLOYMENT ONTARIO PARTNERS' GATEWAY

Employment Ontario Information System - Case Management System (EOIS-CAMS)

- [Guides and Resources](#)
- [Training](#)
- [User Management](#)
- [Communications](#)

Click on the Guides and Resources link

The following screen will appear:



The screenshot displays the Employment Ontario Partners' Gateway website. On the left is a vertical navigation menu with the following items: Employment Ontario Partners' Gateway (dropdown), New Postings, Programs and Services, Stakeholder Engagement, Employment Ontario Leadership Awards, Employment Ontario Information Systems, Tools, and Site Map. Below this are five main navigation categories: Postsecondary Education, Employment and Training, Ontario Job Bank, and Labour Market Information, each with a right-pointing arrow.

The main content area features a banner image of a person sitting on a ledge with a laptop, with the text "EMPLOYMENT ONTARIO PARTNERS' GATEWAY" overlaid. Below the banner is the title "Employment Ontario Information System - Case Management System (EOIS-CAMS)" and a sub-header "Guides and Resources".

Under the "Guides and Resources" section, there are two sub-sections:

- CaMS**
 - [YJC Overview](#) (October 2015) (PDF, 523 KB)
 - [Employment Ontario User Space - User Guide](#) (October 2014) (PDF, 354 KB)
 - [Service Provider User Guide](#)
 - [Desk Aids](#)
- CaMS Reports**
 - [Detailed Reporting User Guides](#)
 - [EOIS Reports Desk Aid](#) (October 2015) (PDF, 65 KB)

A blue arrow points from a yellow callout box containing the text "Click on the Service Provider User Guide" to the "Service Provider User Guide" link in the CaMS list.

The following EOIS-CaMS Resources screen will appear:

EOIS CaMS Resources

EOIS CaMS Service Provider User Guide

This document consists of 12 chapters and provides step-by-step instructions to guide you through EOIS CaMS. Note that the table of contents within the chapters will link to the relevant pages within the document.

- [Chapter 1 - Introduction](#) (December 2015)
- [Chapter 2 - Navigation and Search](#) (December 2015)
- [Chapter 3 - Common Features](#) (December 2015)
- [Chapter 4 - Service Provider Information and User Management](#) (December 2015)
- [Chapter 5 - Aggregate Data](#) (December 2015)
- [Chapter 6 - Employment Ontario Case and Client Profile](#) (December 2015)
- [Chapter 7 - Employer Management](#) (December 2015)
- Chapter 8 - Service Plan Management
 - [8A - Service Plan Management – ES/TIOW](#) (December 2015)
 - [8B - Service Plan Management – LBS](#) (December 2015)
 - [8C – Service Plan Management – COG](#) (December 2015)
 - [8D - Service Plan Management – YJC](#) (December 2015)
- [Chapter 9 - Product Delivery Case Reviews](#) (December 2015)
- [Chapter 10 - Reports](#) (December 2015)
- [Chapter 11 - Employment Ontario Self Service Applications](#) (December 2015)
- [Chapter 12 - Canada-Ontario Job Grant Applications](#) (December 2015)

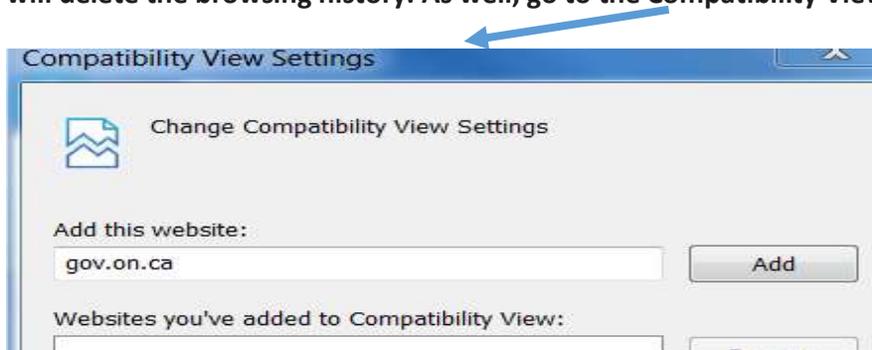
Desk Aids

- [Create and Activate a Service Plan](#) - This desk aid provides quick reference for the seven steps of creating and activating a service plan.
- [Types of Plan Items](#) - This desk aid provides an overview of the four types of plan items and the fields specific to each type (please print this document on legal size paper)
 - [Types of Plan Items - ES/SIS](#)
 - [Type of Plan Items - LBS](#)
- [Adding Sub-Goals](#) - This desk aid provides assistance with the five steps required to add a sub-goal (please print this document on legal size paper)
- [Modify Plan Items](#) - This desk aid provides detailed information on the various statuses of plan items, including fields and steps required to achieve a specific status (double-sided and please print this document on legal size paper)
- [Accessing and Completing Reviews](#) - This desk aid provides detailed information on accessing and completing reviews within EOIS-CaMS (double-sided and please print this document on legal size paper).

For our purposes, since you have already done the EOIS-CaMS modules and read through the training materials, we now highlight key navigation features:

When navigating through the EOIS-CaMS system, DO NOT use the back and forward buttons.

Single-click only on links and actions, use the tab key to move through tabs and fields, and shift-tab to move backwards through the fields. Use you can also scroll vertically and horizontally. If you are experiencing difficulties with your Internet, press <CTRL> + <SHIFT> + . This will delete the browsing history. As well, go to the Compatibility View Settings of your system and add the website: gov.on.ca

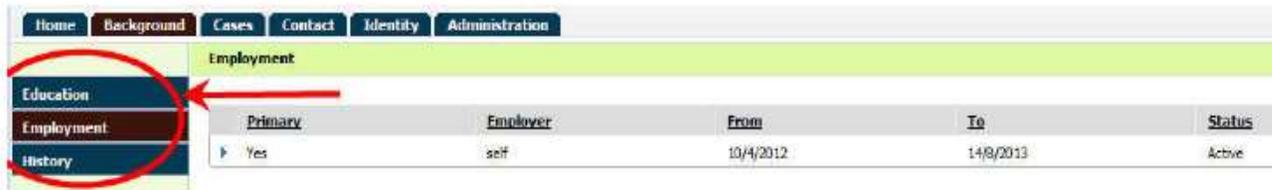


Here are the basic navigation components of the EOIS system:

- **System Tabs:** which appear at the very top of every page and function much like the toolbar in previous releases. For example, the Workspace Tab always returns the user to their starting page;
- **Primary Tabs:** which appear below the system tabs and contain cases and participants profiles; and,
- **Secondary Tabs:** which appear within cases and participants profiles. In some cases, there will be multiple levels of secondary tabs.



Some tabs have a left-hand Tab Content Bar. The items within the bar act as “sub folders” for the specific tab.



The Main Content Area is comprised of five key areas:

2.3.4 Main Content Area

1. Page Title: the title of the current page the user is viewing.
2. Toggle: Much of the information contained within system pages can now be expanded and collapsed using Toggles, which can appear in multiple locations within the system navigation, such as in the top-right corner of panels or to the left of items that appear in lists.
3. Context Panel: cases and participant profiles have a Context Panel that presents a key informational summary. This can be collapsed or expanded using its toggle. When expanding panels in the cascading navigation, it can be helpful to collapse the context panel so that there is more “real estate” on the page.
4. Information Panel: a panel that displays information or that has fillable fields. Information panels can be contracted or expanded using the toggle.
5. Main Content Area: the section of the page that is to the right of the navigation functions. This area is where section content is displayed and entered.



There are two types of home pages: User's home page and the home pages of the Participants and Cases:

User's home, known as the Workspace page, is the entry point to the system. Each user has his/her own home page with access to different links and functions dependent upon his/her assigned user role.

Ontario CASE MANAGEMENT SYSTEM - SERVICE PROVIDER MANAGER APPLICATION

Workspace Cases and Outcomes Tasks Calendar

Enter Reference Number

Preferences Log out

User's name

Welcome to the EOIS Case Management System

My Shortcuts

- Create a New Case
- Create a New Employer
- My Service Provider
- Pending Reviews
- Reassign Cases
- Reassign Reviews
- Search for a Case
- Search for an Application
- Search for a COIG Application
- Search for a Corporate Entity
- Search for an Employer
- View My Bookmarks
- View My Cases

Participants and Cases also have home pages. These home pages are the central pages relating to a participant or case and can be accessed by clicking the Home Tab in the participant's profile or case.

Person Registration X EO (Molly Jones) 4057625 M H. Jones X

Molly Jones - 6284247

Address 901-175 BLOOR ST E TORONTO Ontario M1W3R8

Phone Number 226-411915

Date of Birth 22/04/1995

Gender Female

Home Background Cases Contact Identity Administration

Person Home

Name		Title	
Reference Number	628-4247	Middle Name	
First Name	Molly	Suffix	
Last Name	Jones	Birth Last Name	
Initials	MJ	APPR Party ID	
Mothers Birth Last Name			
Details		Date of Birth	
Gender	Female	Date of Birth	22/04/1995
Registration Date	27/07/2015	Date of Death	
Status in Canada	Canadian Citizen	Country of Birth	
Preferred Language of Service	English	Date Arrived in Canada	
Marital Status	Single	Preferred Communication User	Water Block
Client Self Identification		Visible Minority	
Newcomer	No	Visible Minority	No
Francophone	No	Person with Disability	No
Deaf	No	Deafblind	No
Aboriginal Group			
Contact		Phone Number	
Address	901-175 BLOOR ST E TORONTO Ontario M1W3R8 Canada	Phone Number	

Here are other navigating features you need to be familiar with:

Within the main content area, there are four types of clickable text and buttons that will perform an action when selected. These are shown and described below.

1. Action: underlined text that performs a system function when selected. Actions appear the same as links but perform a different function. Examples of actions include “Save” and “Close.”
2. Action Button: presents actions in a drop-down menu that allows the user to quickly perform a number of context-specific actions. There can be a number of different action buttons on a page as they may relate to different items.
3. Link: a connection between pages. Similar to actions, a link will have text that is underlined.
4. Refresh Button: refreshes all the data on the page to ensure that the user is always viewing the most up to date information.



Mandatory Fields are indicated with a blue asterisk (*)

Dates are entered in the “DD/MM/YYYY” format.

A magnifying glass and clear value icons to perform searches.

Built in postal code Look-Up feature:

If postal code doesn't exist, verify on Canada Post's website. You can also contact client ask for proper address documentation to confirm. If indeed the address does exist, type **"Invalid"** in the postal code field to enter correct address.

Addresses in the system are entered using a centralized Postal Code Look-up application. By entering a client's postal code and clicking SEARCH, an Address Details pop-up page is opened.

Modifying Addresses

System Steps

➡ Step 1: Person Home Page

From the **Contact** tab select **Address** in the tab content bar.

TYPE	Address	CITY	From	To	Status
Primary Mailing	175 BLOOR STE. TORONTO, ON, M4W3R8	TORONTO	24/5/2014		Active
Mailing	175 BLOOR STE. TORONTO, ON, M4W3R8	TORONTO	24/5/2014		Active

➤ Step 2: Addresses Page

Click EDIT in the **Action** Button next to the address that requires modification.

Addresses						New		
Type	Address	City	From	To	Status			
▶ Primary Mailing	175 BLOOR ST E, TORONTO, ON, M4W3R8	TORONTO	24/6/2014		Active			
▶ Mailing	175 BLOOR ST E, TORONTO, ON, M4W3R8	TORONTO	24/6/2014		Active			



Do not click NEW to change an address. This may result in overpayments for clients with active product delivery cases.

Performing a Person Search:

The Person Search allows for users to search for client records. This search must be performed prior to registering the person. There are a number of search parameters, including reference number, last name, first name, date of birth and gender.

System Steps

➤ Step 1: Workspace Page

Select the **Cases and Outcomes** system tab.



My Shortcuts

- [Create a New Case](#)
- [Create a New Employer](#)
- [Pending Reviews](#)
- [Search for an Application](#)
- [Search for a COJG Application](#)
- [Search for a Case](#)
- [Search for a Corporate Entity](#)
- [Search for an Employer](#)
- [View My Bookmarks](#)
- [View My Cases](#)

Step 2: Cases and Outcomes Page

Open the **Shortcuts Panel**.



Step 3: Cases and Outcomes Page

Click **FIND PERSON**.



Step 4: Person Search Page

Enter the search criteria, and click **SEARCH**.

Person Search x

Person Search * required field

Search Criteria

Reference Number

Last Name

Date of Birth

APPR Party ID

First Name

Gender

City

Search Results

Reference Number	First Name	Last Name	City	Date of Birth	APPR Party ID



If there are not enough search criteria entered, the system will display an error message.

This is how the EOIS-CaMS system is designed to perform searches:



The **First Name** and **Last Name** fields will perform a search by partial names. For example, when entering "Soren" in the **Last Name** field, the system will perform a search for last names that contain "Soren," like "Sorenson," "Sorensen."

The box beside the **First Name** field is the nickname option. When selected, the system will search for similar names. For example, when entering "Bill" in the **First Name** field, and selecting the checkbox beside the field, the system will perform a search for "Bill," "Billy," "Will," and "William."

The system will ignore special characters (accents) and case (upper and lower) when searching in the **First Name** and **Last Name** fields.

➡ Step 5: Person Search Page

The system will display the results that match the search criteria in the **Search Results** information panel. The number of items returned in the search is indicated in the information panel header.

If the client is registered, click on the corresponding REFERENCE NUMBER link to display the Person Home page.

Person Search X

Person Search

Search Criteria

Reference Number	<input type="text"/>		
Last Name	<input type="text" value="Pink"/>	First Name	<input type="text"/>
Date of Birth	<input type="text"/>	<input type="checkbox"/>	Gender
APPR Party ID	<input type="text"/>		

Search Results (Number of Items: 1 out of 1)

Reference Number	First Name	Last Name	City
8003712	Miss	Pink	Toronto

➔ Click here

You can also perform a search for a case:

➤ Step 1: Workspace Page

Click SEARCH FOR A CASE.



➤ Step 2: Case Search Page

Enter search criteria for a case. If using the **Client Name** field, clicking on the magnifying glass will open a pop-up window for a Person Search. This search can be completed as outlined in 2.9.1 Person Search, step 3. Click SEARCH.

Search Criteria
You can search using a Case Reference Number or a combination of other search criteria.

Case Reference	<input type="text"/>	
Client Name	<input type="text"/>	<input type="checkbox"/> Display cases with Service Plans
Category & Program	<input type="text"/>	<input type="checkbox"/> Client Reference
Start Date	<input type="text"/>	<input type="checkbox"/> Status
Owner	<input type="text"/>	<input type="checkbox"/> End Date

➤ Step 3: Case Search Page

The system will display the results that match the search criteria in the **Search Results** information panel. The number of items returned in the search is indicated in the information panel header.

Click on the corresponding link

Click on the corresponding SELECT link.

Critères de recherche

Numéro de référence:

Nom: Prénom:

Date de naissance: Sexe:

Rechercher Réinitialiser Annuler

Résultats de recherche (nombre d'éléments: 1 d'éléments)

Action	numéro de référence	Prénom	Nom de famille	Ville	Date de naissance
Sélectionner	8003712	Miss	Pink	TORONTO	25/6/2014

Another search that will important to know is the Service Provider Search:

The Service Provider Search allows the user to find service providers contracted with the ministry.

System Steps

➤ Step 1: Workspace Page

Click the **Cases and Outcomes** system tab.

Workspace **Cases and Outcomes** Tasks Calendar

Welcome to the EOIS Case Management System

My Shortcuts

- [Create a New Case](#)
- [Create a New Employer](#)
- [Pending Reviews](#)
- [Search for an Application](#)
- [Search for a COIG Application](#)
- [Search for a Case](#)
- [Search for a Corporate Entity](#)
- [Search for an Employer](#)
- [View My Bookmarks](#)
- [View My Cases](#)

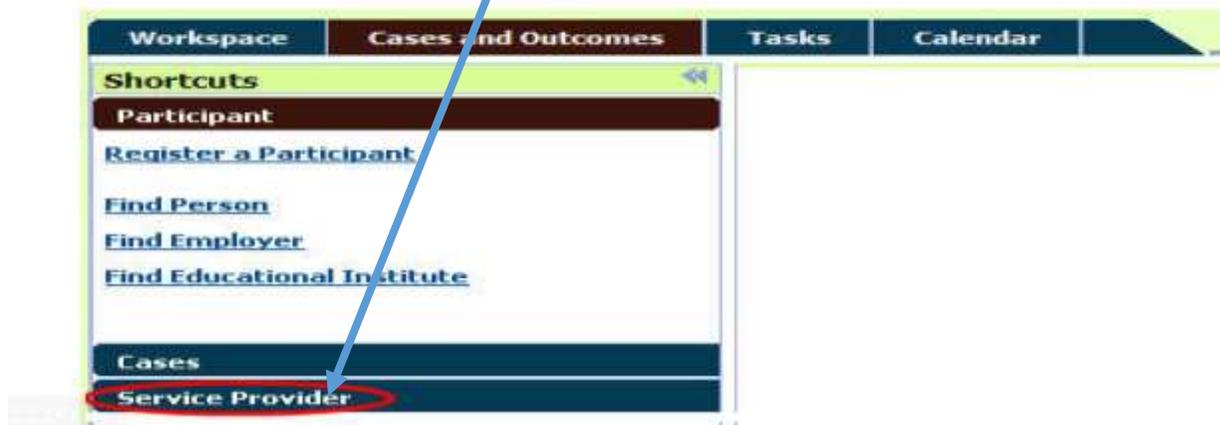
➔ Step 2: Cases and Outcomes Page

Open the **Shortcuts** panel.



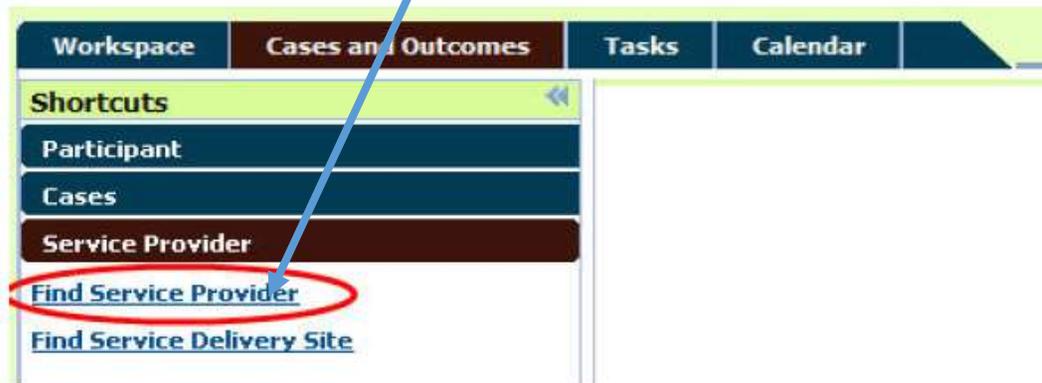
➔ Step 3: Cases and Outcomes Page

Click the **Service Provider** button.



➤ Step 4: Cases and Outcomes Page

Click FIND SERVICE PROVIDER.



➤ Step 5: Service Provider Search Page

Enter search criteria for a service provider, and click SEARCH.

The screenshot shows the 'Service Provider Search' page. The navigation menu on the left is the same as in Step 4. The main content area has a title 'Service Provider Search' and a search criteria section with three input fields: Reference Number, Address, and IFIS Supplier Number. A 'Search' button is located below the input fields and is circled in red. Below the search criteria is a table titled 'Service Providers' with columns for Reference Number, Business Name, and IFIS Supplier Number.

Reference Number	Business Name	IFIS Supplier Number
------------------	---------------	----------------------

➡ Step 6: Service Provider Search Page

The system will display the results that match the search criteria in the **Search Results** information panel. The number of items returned in the search is indicated in the information panel header.

If the service provider is registered, click on the corresponding REFERENCE NUMBER link to display the service provider's page.

✕
🔄 📄
* required field

Search Criteria

Reference Number	<input type="text"/>	Business Name	<input type="text" value="ABJ Employment"/>
Address	<input type="text"/>	City	<input type="text"/>
IFIS Supplier Number	<input type="text"/>	Status	<input type="text"/>

Service Providers (Number of Items: 1 out of 1)

Reference Number	Business Name	IFIS Supplier Number	Address	City	Status
6656	ABJ Employment	458309	175 BLOOR ST E	TORONTO	Active

Registering and Creating a Service Plan for a Client in EOIS-CaMS



1. Log into the ONE-key portal: <https://www.iaa.gov.on.ca/iaalogin/IAALogin.jsp?> with your ID with your USERNAME and PASSWORD.

Ontario ONE-key

HELP | ServiceOntario | About Ontario

Sign in

Sign in with your ONE-key ID

New to ONE-key?
A ONE-key account gives you secure access to Ontario Government programs and services. [Learn more](#)

Don't have a ONE-key ID? [Sign up now!](#)

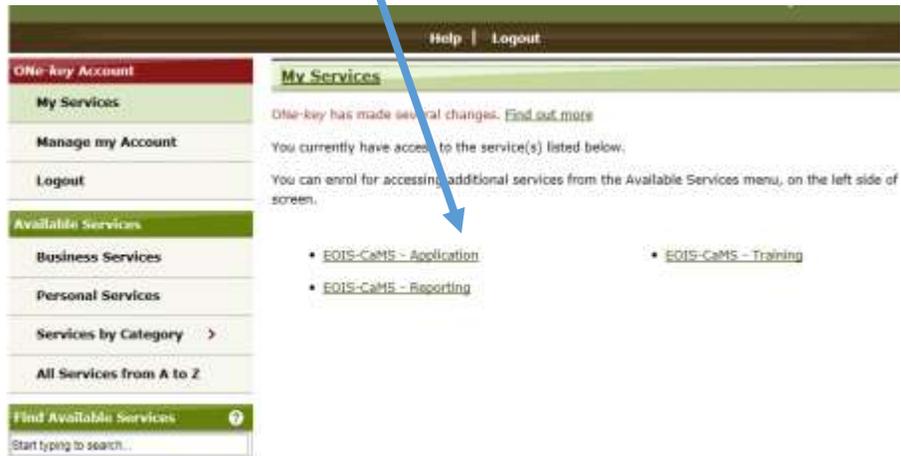
ONE-key ID:

Password:

Sign in

[Can't access your account?](#)

Then, click on EOIS-CaMS Application services.



Help | Logout

ONE-key Account

My Services

ONE-key has made several changes. [Find out more](#)

You currently have access to the service(s) listed below:

You can enrol for accessing additional services from the Available Services menu, on the left side of screen.

Available Services

- [EOIS-CaMS - Application](#)
- [EOIS-CaMS - Reporting](#)
- [EOIS-CaMS - Training](#)

Business Services

Personal Services

Services by Category >

All Services from A to Z

Find Available Services ?

Start typing to search...

2. Enter your PIN:



Ontario **ONE-key**

ONE-KEY PORTAL | LOGOUT

Employment Ontario Information System (EOIS)

Confirm your identity

* Required Field

EOIS Private Identification Number (PIN) *

Please enter your EOIS Private Identification Number (PIN)

NOTE: remember to "logout" if you are not active in EOIS-CaMS as the system will disconnect you after 15 minutes of inactivity.

3. The following EOIS-CaMS system screen will appear. You can perform a person search by either selecting **SEARCH FOR A CASE** or on **CREATE A NEW CASE**. In this example, we will conduct a search by clicking on **CREATE A NEW CASE**. \Here is a desk aid URL link to understand the basic steps of creating and activating a service plan

http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams_day1/deskaid/eois_cams_activate_service_plan.pdf



4. Enter Last Name, First Name, date of birth in the following format DD/MM/YYYY and gender, then click **SEARCH**.

Person Registration X

Confirm Person Not Already Registered

Enter search criteria to help you determine if the person has been registered before. * required field

Search Criteria

Reference Number Gender

Last Name First Name

Date of Birth APPR Client Party ID

Search Results

Case Reference	Client Reference	First Name	Last Name	City	Date Of Birth	APPR Client Party ID

5. If this client record does not exist, then the following screen will appear, Press CONTINUE and then GO DIRECTLY to section #7.
6. If the client already exist in the system, then an EO case number will appear. You will need to verify and update personal data in the person reference section. Update addresses, emails and phone numbers in the CONTACT section. Update EDUCATION and EMPLOYMENT under the PERSON REFERENCE section. Once updated, then jump to section #15, and add a new service plan.

Person Registration x

Confirm Person Not Already Registered

Enter search criteria to help you determine if the person has been registered before. * rec

Search Criteria

Reference Number	<input type="text"/>	Gender	<input type="text" value="Male"/>
Last Name	<input type="text" value="DOE"/>	First Name	<input type="text" value="JOHN"/> <input type="checkbox"/>
Date of Birth	<input type="text" value="02/07/1987"/>	APPR Client Party ID	<input type="text"/>

Search Results (Number of Items: 0 out of 0)

Case Reference	Client Reference	First Name	Last Name	City	Date Of Birth	APPR Client Party I

7. You will now be brought automatically to the PERSON REGISTRATION screen. Complete the information and mandatory fields which are marked with an asterisk*. As discussed earlier in the Search and Navigation section, postal codes use a centralized application. Enter POSTAL CODE and click SEARCH, address will populate. If the address doesn't exist, verify with client's supporting documents. If the address does exist, type "Invalid" in postal code area to override this area and enter correct address.

Person Registration

Register Person Register Cancel

* required field

Name of Person

First Name* JOHN
 Last Name* DOE
 Initials
 Mother's Birth Last Name
 Title

Details

Gender* Male
 Registration Date* 20/03/2018
 Status in Canada*
 Preferred Language*
 Marital Status*

Client Self Identification

Newcomer
 Francophone
 Deaf
 Aboriginal Group

Primary Mailing Address
 Please enter a valid postal code and click Search to retrieve the primary mailing address.

Country Canada
 Postal Code Lookup Search

Primary Mailing Address Details

Apt/Suite
 Street 2
 Province/State*
 Street 1*
 City*
 Postal/Zip Code*

Alternate Mailing Address

Same as primary Country Canada Postal Code Lookup Search

Alternate Mailing Address Details
 Please enter an alternate mailing address if different from primary mailing address.

Apt/Suite
 Street 2
 Province/State*
 Street 1
 City
 Postal/Zip Code

Phone Number

Primary Area Code	Primary Phone Number	Primary Extension	Primary TTY
Alternate Area Code	Alternate Phone Number	Alternate Extension	Alternate TTY
Fax Area Code	Fax Number	Fax Extension	Fax TTY

Email Address Details

Email Address

8. Complete all of the information gathered from the Participant Registration Form (PRF) found on this site under LBS: <http://www.tcu.gov.on.ca/eng/eopg/tools/forms.html> and then click on REGISTER to create a new LBS service plan.

9. A message will appear stating you have now registered your participant and created a new EO (Employment Ontario Case).

NOTE: copy the reference number into the "PERSON REFERENCE" section of the Participant Registration Form (PRF). The PERSON REFERENCE is also known as PRIMARY CLIENT.

Person Home			
Name		Title	
Reference Number	123456	Middle Name	
First Name		Suffix	
Last Name		Birth Last Name	
Initials	SB	APPR Party ID	
Mothers Birth Last Name			
Details			
Gender	Female	Date of Birth	
Registration Date		Date of Death	
Status in Canada	Canadian Citizen	Country of Birth	
Preferred Language of Service	English	Date Arrived in Canada	
Marital Status	Single	Preferred Communication User	Email
Client Self Identification			
Newcomer	No	Visible Minority	No
Francophone	No	Person with Disability	No
Deaf	No	Deafblind	No
Aboriginal Group			
Contact			
Address	CHELMSFORD Ontario POMILO Canada	Phone Number	(705)
Current Activities			
Open Tasks	1	Open Cases	1

10. You will also want to ADD the Education and Employment Record information. Click on the **BACKGROUND** tab, the following screen will appear.

The screenshot shows the 'BACKGROUND' tab selected in the system. The 'Education' section is highlighted, and a 'New' button is visible. A blue arrow points from the 'BACKGROUND' tab to the 'New' button.

Type	Qualification	Institution	Start Date	End Date	Status
Full-Time	Grade 12 or Equivalent	Rayside High School	04/03/1980	30/06/1985	Active

11. Click on **NEW** to enter the latest Education. The following screen will appear. Enter the most recent information given from the PRF, and then **SAVE**.

The screenshot shows the 'Create Education' form. The form includes fields for Institution, Program Name, Start Date, End Date, Type, and Country. A 'Comments' field is also present. The 'Save', 'Save & New', and 'Cancel' buttons are visible at the bottom.

Course Details

Institution * **Qualification ***

Program Name

Start Date * 28/03/2016 **End Date**

Type *

Country *

Comments

Save **Save & New** **Cancel**

12. Next, enter the Employment Information by selecting the EMPLOYMENT tab and then the NEW button.

The screenshot shows the EOIS-CaMS interface. At the top, there is a 'Case Search' field with a dropdown arrow and a search icon. Below this is a header area with fields for 'Address', 'Phone Number', 'Date of Birth', and 'Gender'. A navigation bar contains tabs for 'Home', 'Background', 'Cases', 'Contact', 'Financials', 'Identity', and 'Administration'. The 'Employment' tab is selected and highlighted in green. Below the navigation bar, there is a table with columns: 'Primary', 'Employer', 'From', 'To', and 'Status'. The table contains two rows of data. A 'New' button is located to the right of the table. Two blue arrows point from the text above to the 'Employment' tab and the 'New' button.

Primary	Employer	From	To	Status
No	Com	01/03/2010	01/04/2011	Active
Yes	St. Gabriel	15/04/2011	01/09/2011	Active

13. Enter the employment data from the participant's registration form. You also need to look up the National Occupational Classification (NOC) codes <http://www5.hrsdc.gc.ca/NOC/English/NOC/2011/Welcome.aspx> and the North American Industry Classification System Canada (NAICS) codes <http://www23.statcan.gc.ca/imdb/p3VD.pl?Function=getVDPPage1&db=imdb&dis=2&adm=8&TVD=118464>

The screenshot shows the 'Create Employment' form. The form has a title bar 'Create Employment' and a close button. Below the title bar is a green header with the text '* required field'. The form is divided into sections: 'Details', 'Comments', and a footer with buttons. The 'Details' section contains the following fields:

- Employment Type * (dropdown menu)
- Employer * (text input field)
- From Date * (calendar icon)
- Employment NOC * (text input field)
- Employment Reason For Leaving (dropdown menu)
- Placement Category (dropdown menu)
- Wage Amount (text input field, value: 0.00)
- NAICS Code * (text input field)
- Country Of Employment * (dropdown menu)
- To Date (calendar icon)
- Primary (checkbox)
- Job Title * (text input field)
- Employment Hours per Week * (text input field)
- Wage Per (dropdown menu)

The 'Comments' section is a text area with a scroll bar. At the bottom of the form are three buttons: 'Save', 'Save & New', and 'Cancel'.

14. As well, you can transcribe the new EO case number into the “CASE REFERENCE” section of the PRF. Now click on the HOME tab to add a new LBS service plan.

The screenshot shows the 'Employment Ontario Home' page. The navigation bar includes 'Home', 'Events', 'Administration', 'Recent Changes', and 'Assessments'. The 'Home' tab is selected. The main content area displays case details for 'Holly Jones' with case number 4057025. The 'Case Reference' field is highlighted with a red box.

Case Reference	Received Date
4057025	05/04/2012

15. A new screen will appear. Click on “NEW SERVICE PLAN” from the Action Button.

The screenshot shows the 'Employment Ontario Home' page for case 4057025. The 'Action Button' menu is open, and the 'NEW SERVICE PLAN' option is highlighted with a red box. The 'Case Reference' field is also highlighted with a red box.

Case Reference	Received Date
4057025	27/07/2015

16. etc all the fields. For Program, select “Literacy and Basic Skills”. For Referred In, select how client was referred to your program. This information is pulled from the PRF form. For delivery site, click on the magnifying glass icon and your appropriate Service Delivery Site Name. Choose the template based on the plan items that have been agreed upon with the client.

NOTE: it is really important to the select the appropriate goal path as system defaults to EMPLOMENT. Click SAVE.

Create Service Plan

* required field

Details

Primary Client: Tom Red

Program: Literacy and Basic Skills

Referred In: Ontario Works

Owner: Mister Green

Service Delivery Site: ABJ Employment - Toronto

Self Service Initiated: No

Template Name: Goal Path to Employment | Voie de transition vers l'emploi

Template: Goal Path to Employment | Voie de transition vers l'emploi

Save Cancel

17. You have now created an LBS Service plan. It is recommended to note this LBS Case Reference number on your PRF. Notice the status is “open” as this case has not been yet submitted for approval.

EO (T. Red) 3415858 ✕ LBS (T. Red) 3416332 ✕

Tom Red - 3416332

Program	Literacy and Basic Skills	Status	Open
Start Date	2/7/2014	Closed Date	
Owner	Mister Green	Service Delivery Site	ABJ Employment - Toronto

Home Client Summary Plan Content Plan Summary Administration Events

Service Plan Home

Case Details

Primary Client	Tom Red	Plan Reference Number	3416332
Program	Literacy and Basic Skills	Status	Open
Owner	Mister Green [Change Owner]	Closure Reason	
Service Delivery Site	ABJ Employment - Toronto [Change Service Delivery Site]	Outcome	
Goal	Employment [Change Goal]	Referred In	Ontario Works
Start Date	2/7/2014	Closed Date	
Self Service Initiated	No		

Name of Sub-Goal	Start Date	End Date	Status	Outcome

Comments

18. The next step is to complete the CLIENT SUMMARY tab. Click on CLIENT SUMMARY and then NEW.



EO (T. Red) 3415858 X LBS (T. Red) 3416332 X

Tom Red - 3416332

Program	Literacy and Basic Skills	Status	Open
Start Date	2/7/2014	Closed Date	
Owner	Mister Green	Service Delivery Site	ABJ Employment - Toronto

Home **Client Summary** Plan Content Plan Summary Administration Events

Service Plan Home

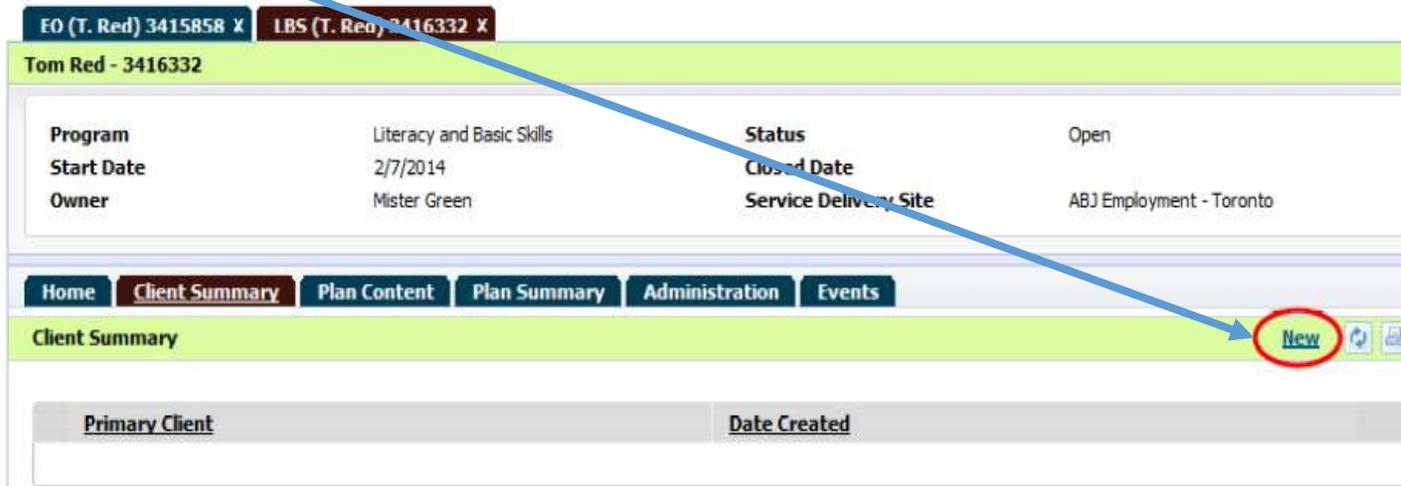
Case Details

Primary Client	Tom Red	Plan Reference Number	3416332
Program	Literacy and Basic Skills	Status	Open
Owner	Mister Green [Change Owner]	Closure Reason	
Service Delivery Site	ABJ Employment - Toronto [Change Service Delivery Site]	Outcome	
Goal	Employment [Change Goal]	Referred In	Ontario Works
Start Date	2/7/2014	Closed Date	
Self Service Initiated	No		

Name of Sub-Goal	Start Date	End Date	Status	Outcome

Comments

19. Click on NEW.



EO (T. Red) 3415858 X LBS (T. Red) 3416332 X

Tom Red - 3416332

Program	Literacy and Basic Skills	Status	Open
Start Date	2/7/2014	Closed Date	
Owner	Mister Green	Service Delivery Site	ABJ Employment - Toronto

Home **Client Summary** Plan Content Plan Summary Administration Events

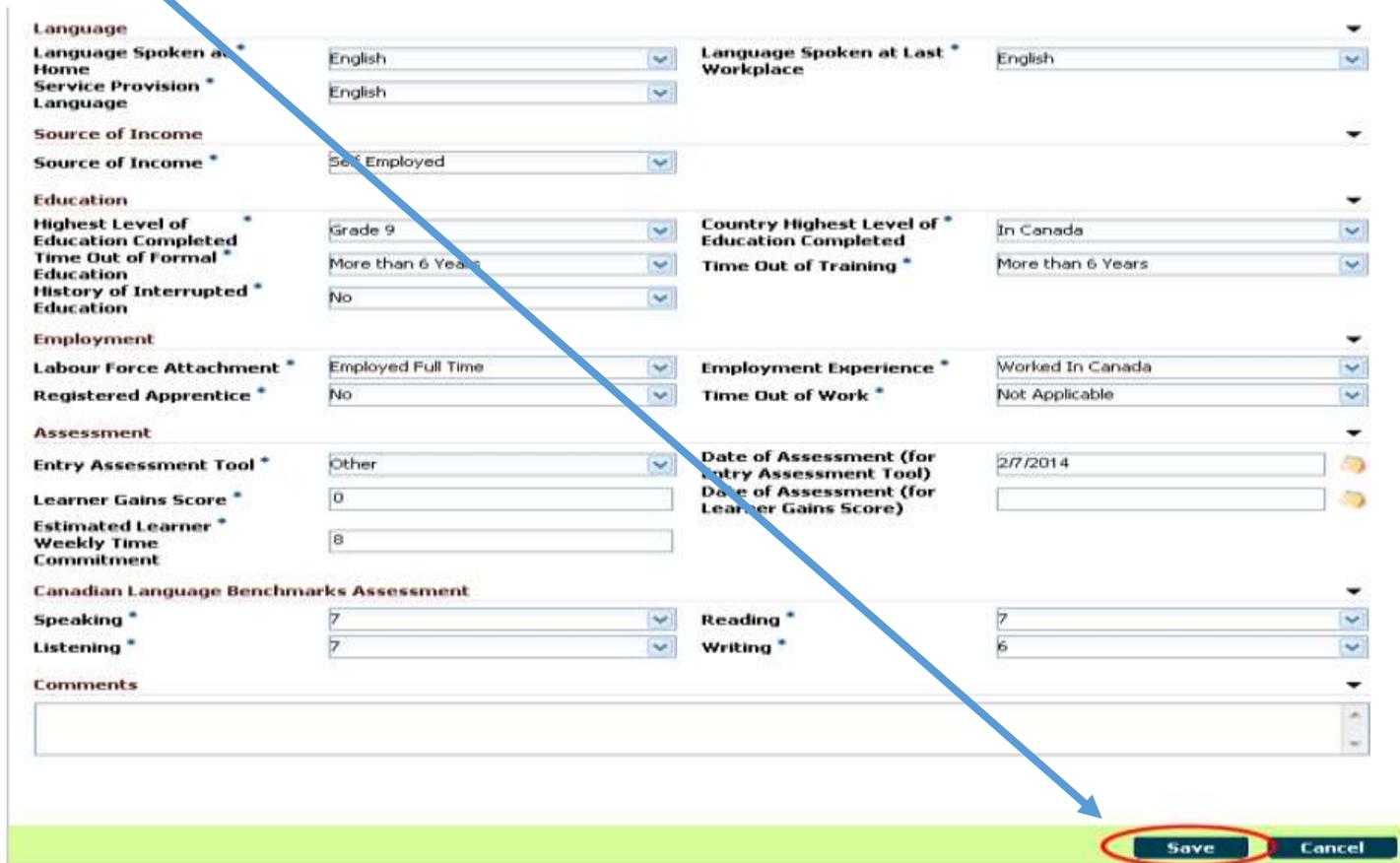
Client Summary

New  

Primary Client	Date Created

20. Complete all of the fields from the PRF.

Note: if "none" is selected for Entry Assessment Tool, then the date does not need to be entered, likewise for the Learner Gains Score. Click SAVE.



The screenshot shows a form with the following sections and fields:

- Language**
 - Language Spoken at Home * (English)
 - Service Provision Language (English)
 - Language Spoken at Last Workplace * (English)
- Source of Income**
 - Source of Income * (Self Employed)
- Education**
 - Highest Level of Education Completed * (Grade 9)
 - Country Highest Level of Education Completed * (In Canada)
 - Time Out of Formal Education * (More than 6 Years)
 - Time Out of Training * (More than 6 Years)
 - History of Interrupted Education (No)
- Employment**
 - Labour Force Attachment * (Employed Full Time)
 - Registered Apprentice * (No)
 - Employment Experience * (Worked In Canada)
 - Time Out of Work * (Not Applicable)
- Assessment**
 - Entry Assessment Tool * (Other)
 - Date of Assessment (for Entry Assessment Tool) (2/7/2014)
 - Learner Gains Score * (0)
 - Date of Assessment (for Learner Gains Score)
 - Estimated Learner Weekly Time Commitment (8)
- Canadian Language Benchmarks Assessment**
 - Speaking * (7)
 - Listening * (7)
 - Reading * (7)
 - Writing * (6)
- Comments**

At the bottom right, there are two buttons: **Save** and **Cancel**. The **Save** button is circled in red, and a blue arrow points from the note above to it.

Almost there! It's time to ADD the SUB-GOAL(S) and PLAN-ITEM(S) and COMPLETE the SERVICE PLAN!

Adding the SUB-GOAL(S) and PLAN-ITEM(S) and COMPLETING the SERVICE PLAN



21. Click on the PLAN CONTENT tab.

Home Client Summary **Plan Content** Plan Summary Administration Events

Service Plan Home

Case Details

Primary Client	Tom Red	Plan Reference Number	3416332
Program	Literacy and Basic Skills	Status	Open
Owner	Mister Green [Change Owner]	Closure Reason	
Service Delivery Site	ABJ Employment - Toronto [Change Service Delivery Site]	Outcome	
Goal	Employment [Change Goal]	Referred In	Ontario Works
Start Date	2/7/2014	Closed Date	
Self Service Initiated	No		

Name of Sub-Goal	Start Date	End Date	Status	Outcome

Comments

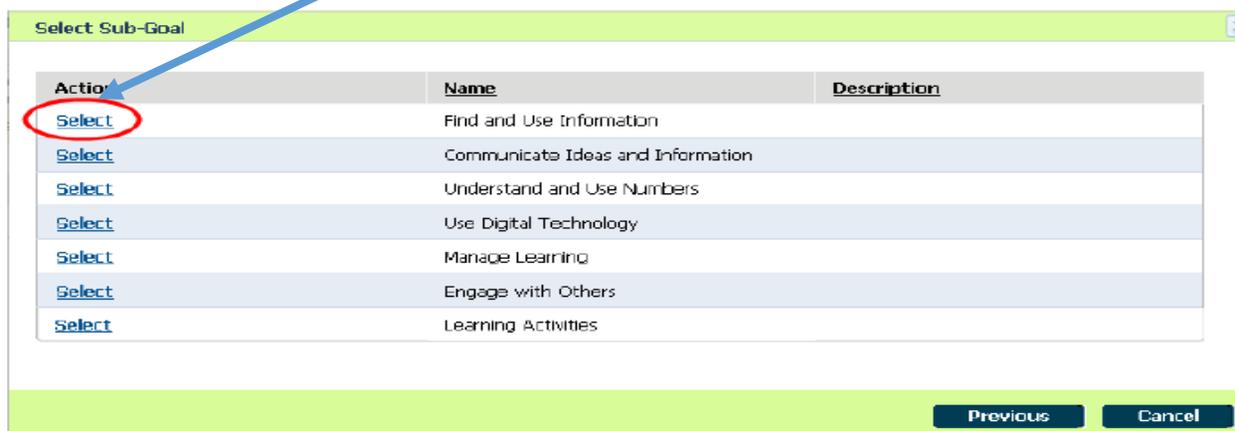
22. Now click on NEW SUB-GOAL to add a New SUB-GOAL. Sub-goals are also known as COMPETENCIES under the Ontario Adult Literacy Curriculum Framework (OALCF).



23. Select the Sub-Goal Type page COMPETENCIES



24. Then select appropriate SUB-GOAL.



25. Add Sub-Goal Page and click SAVE.

Add Sub-Goal * required field

Details

Name Find and Use Information

Owner

Me **User**

Comments

26. Now you are ready to ADD PLAN ITEM to the appropriate SUB-GOAL. Click on the Action button and select ADD PLAN ITEM. Under OALCF, plan items are also known Task Groups.

Plan Content New Sub-Goal

Name of Sub-Goal	Start Date	End Date	Status	Outcome
Find and Use Information			Not Started	

27. Select the appropriate PLAN ITEM.

Select Plan Item Type

Plan Item

Action	Name	Plan Item Type	Description
<input type="button" value="Select"/>	Read Continuous Text	Basic Plan Item	
<input type="button" value="Select"/>	Interpret Documents	Basic Plan Item	
<input type="button" value="Select"/>	Extract Info from Films, Broadcasts and Presentations	Basic Plan Item	

28. Complete fields as required. For Expected Outcome, use drop-down menu to select appropriate value.

For Expected Start Date and Expected End Date, use your defined course dates; otherwise use the system's default dates.

Select a Delivery Method and if the Milestone is known at this point, use the drop-down to select the Milestone. Click on SAVE.

Add Plan Item: Literacy and Basic Skills 3416332 - Tom Red 6003479 * required field

Details

Sub-Goal	Find and Use Information	Name	Read Continuous Text
Primary Client	Tom Red		
Expected Start Date *	2/7/2014	Expected End Date *	2/7/2014
Expected Outcome *	Level 1	Estimated Cost	

Responsibility

Me	<input type="checkbox"/>	User	
Sub-Goal Owner	<input type="checkbox"/>	Participant	Tom Red
Plan Item Owner			
Sub-Goal Owner	<input type="checkbox"/>	User	Mister Green

Additional Information

Service Delivery Site *	ABJ Employment - Toronto	Delivery Method *	Classroom
Blended Learning	<input type="checkbox"/>		
Milestone			

Comments

Save **Cancel**

29. You can also add a PLAN ITEM to the Learning Activities Sub-Goal. Again, complete necessary fields.

For Expected Outcome (for all Learning Activities Plan Items other than Custom Basic Plan Item), there is only one available option to choose which is "Related Learning Achieved".

For Expected Start and End date, enter your defined dates; otherwise, the system will use defaults.

No Milestone and Delivery Method are not mandatory fields for this plan. Click SAVE.

Add Plan Item: Literacy and Basic Skills 3416332 - Tom Red 6003479 * required field

Details

Sub-Goal	Learning Activities	Name	Learning related to workplace math
Primary Client	Tom Red	Expected Start Date *	2/7/2014
Expected Start Date *	2/7/2014	Expected End Date *	2/7/2014
Expected Outcome *	Related Learning Achieved	Estimated Cost	

Responsibility

Me	<input type="checkbox"/>	User	
Sub-Goal Owner	<input type="checkbox"/>	Participant	Tom Red
Plan Item Owner		User	Mister Green

Additional Information

Service Delivery Site *	ABJ Employment - Toronto	Delivery Method *	Classroom
Blended Learning	<input type="checkbox"/>		
Milestone			

Comments

Save **Cancel**

30. If your agency provides Training Support (TS) allowances, you can also add a PLAN ITEM for Training Supports. For Expected Outcome, the option is Support Paid. Enter your agency's defined expected start and end dates, otherwise, default dates will be assigned. Delivery Method and Milestone are not required for this plan item. Enter estimated cost for defined start and end date. Click SAVE

Add Plan Item: Literacy and Basic Skills 3416332 - Tom Red 6003479

Details

Sub-Goal: Training Supports Name: Transportation

Primary Client: Tom Red

Expected Start Date *: 2/7/2014 Expected End Date *: 2/7/2014

Expected Outcome *: Support Paid Estimated Cost: []

Responsibility

Me: [] User: []

Sub-Goal Owner: [] Participant: Tom Red

Plan Item Owner: [] User: Mister Green

Additional Information

Service Delivery Site *: ABJ Employment - Toronto Delivery Method: []

Blended Learning: []

Milestone: []

Comments: []

31. Once you have added all your Sub-goals and plan items, you are now ready to submit the service plan for APPROVAL. Click on HOME and select SUBMIT FOR APPROVAL from the Action button.

Home Client Summary Plan Content Plan Summary Administration Events

Service Plan Home

Case Details

Primary Client: [Tom Red](#) Plan Reference Number: []

Program: Literacy and Basic Skills Status: []

Owner: Mister Green [\[Change Owner\]](#) Closure Reason: []

Service Delivery Site: ABJ Employment - Toronto [\[Change Service Delivery Site\]](#) Outcome: []

Goal: Employment [\[Change Goal\]](#) Referred In: Ontario Works

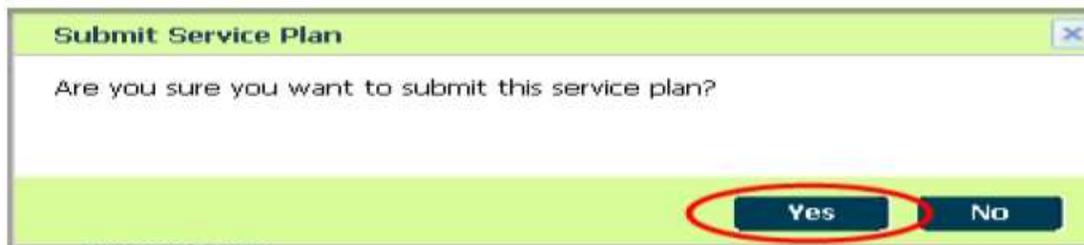
Start Date: 2/7/2014 Closed Date: []

Self Service Initiated: No

[Edit Service Plan](#)
[Submit for Approval](#)
[Close](#)
[Change Closure Details](#)
[Add Bookmark](#)

Name of Sub-Goal	Start Date	End Date	Status	Outcome
Find and Use Information	2/7/2014	2/7/2014	Not Started	[]
Learning Activities	2/7/2014	2/7/2014	Not Started	[]
Training Supports	2/7/2014	2/7/2014	Not Started	[]

32. When prompted to confirm the submission, click YES.



33. Notice the status of the service plan will now display as "Approved".



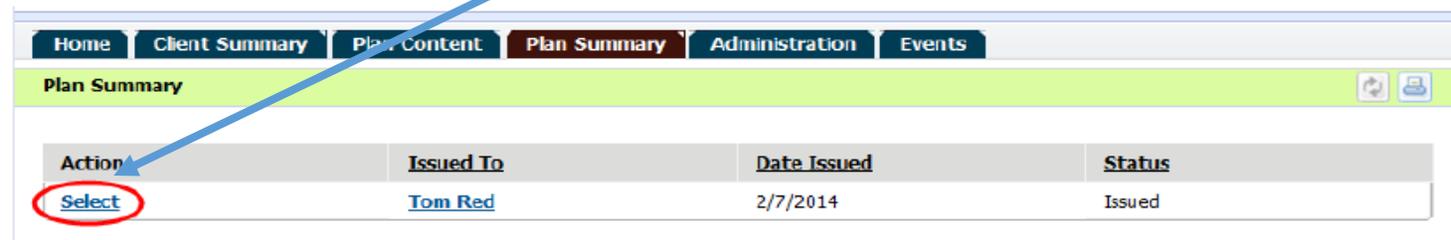
34. Next step will be to create a PLAN SUMMARY. Click on the PLAN SUMMARY tab.



35. Click NEW from the Action button.



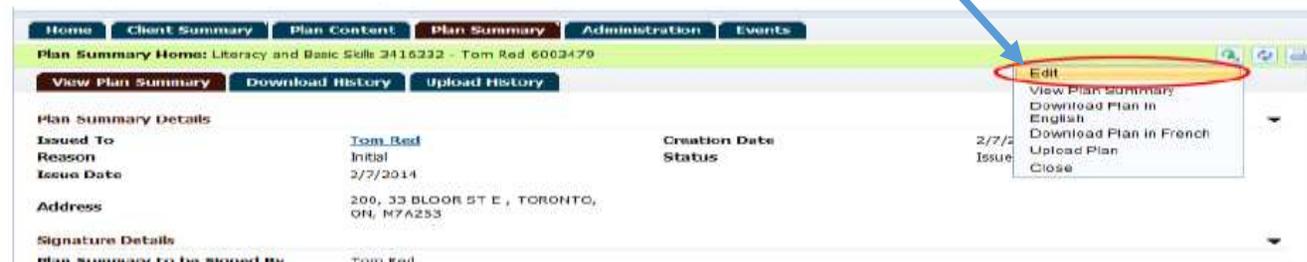
36. The Plan Summary has been created. Click SELECT. Note: the system populates the client's info and address. The " DATE ISSUED" is set to the current and the Reason is set to initial.



37. Confirm that your information is correct. Select EDIT from the Action button.



Step 3: Plan Summary Home Page
From the **Action Button**, select EDIT.



Enter the date the learner accepted his/her learner plan under DATE ACCEPTED.

Modify Plan Summary Details: Literacy and Basic Skills 3416332 - Tom Red 6003479

* required field

Details

Issue To: [Tom Red](#) Address: 33 BLOOR ST E

Reason: Initial Issue Date: 2/7/2014

Acceptance

Date Accepted: 2/7/2014

Location: Reference:

File

Rejection

Date Rejected: Rejection Reason:

Rejection Comments:

38. Notice the status of the service plan has now changed to "Accepted".

Home Client Summary Plan Content **Plan Summary** Administration Events

Plan Summary Home: Literacy and Basic Skills 3416332 - Tom Red 6003479

View Plan Summary Download History Upload History

Plan Summary Details

Issued To	Tom Red	Creation Date	2/7/2014
Reason	Initial	Status	Accepted
Issue Date	2/7/2014		
Address	200, 33 BLOOR ST E , TORONTO, ON, M7A2S3		

Signature Details

Plan Summary to be Signed By: Tom Red

Acceptance

Date Accepted	2/7/2014	File	
Location		Reference	

39. To print the Learner Plan (LP), select **DOWNLOAD PLAN IN ENGLISH OR FRENCH** (depending on which language client prefers) from the **Action** button.

The screenshot displays the 'Plan Summary' page for a client named Tom Red. The page includes navigation tabs at the top: Home, Client Summary, Plan Content, Plan Summary (selected), Administration, and Events. Below the navigation is a breadcrumb trail: Plan Summary Home: Literacy and Basic Skills 3416332 - Tom Red 6003479. There are three icons (refresh, back, print) in the top right corner. Below the breadcrumb are three buttons: View Plan Summary, Download History, and Upload History. The main content area is divided into sections: Plan Summary Details, Signature Details, Acceptance, Rejection, and Cancellation. The Plan Summary Details section includes fields for Issued To (Tom Red), Reason (Initial), Issue Date (2/7/2014), Address (200, 33 BLOOR ST E, TORONTO, ON, M7A2S3), Creation Date (2/7/2014), and Status (Issued). A red dashed arrow points to the print icon in the top right corner. A red box highlights the 'Action' menu, which is open and shows the following options: Edit, View Plan Summary, Download Plan in English, Download Plan in French, Upload Plan, and Close.

Plan Summary Details		Creation Date	Status
Issued To	Tom Red	2/7/2014	Issued
Reason	Initial		
Issue Date	2/7/2014		
Address	200, 33 BLOOR ST E, TORONTO, ON, M7A2S3		
Signature Details			
Plan Summary to be Signed By	Tom Red		
Acceptance			
Date Accepted		File Reference	
Location			
Rejection			
Date Rejected		Rejection Reason	
Rejection Comments			
Cancellation			
Date Cancelled		Cancellation Reason	
Cancellation Comments			

Once downloaded in a PDF format you can print the LP to have the learner sign the copy. Keep a signed LP on file for your Ministry site visit.

Also, you can save a copy of the LP on a secured drive. You can also upload the saved plan to the EOIS-CaMS system using the following steps.

40. Go to Plan Summary, click on the Action button and select the saved learner plan you want to upload.

Plan Summary Home: Literacy and Basic Skills 3416332 - Tom Red 6003479

View Plan Summary Download History Upload History

Plan Summary Details

Issued To	Tom Red	Creation Date	2/7/2014
Reason	Initial	Status	Issued
Issue Date	2/7/2014		
Address	200, 33 BLOOR ST E, TORONTO, ON, M7A2S3		
Signature Details			
Plan Summary to be Signed By	Tom Red		
Acceptance			
Date Accepted		File Reference	
Location			
Rejection			
Date Rejected		Rejection Reason	
Rejection Comments			
Cancellation			
Date Cancelled		Cancellation Reason	
Cancellation Comments			

41. You will see the following screen. Click on BROWSE to retrieve your saved learner plan file, select reason for upload and click on UPLOAD.

Upload Learner Plan Literacy and Basic Skills 3416340 - Tom Red 6003479

* required field

Select file to upload

File C:\Users\Pap... Browse...

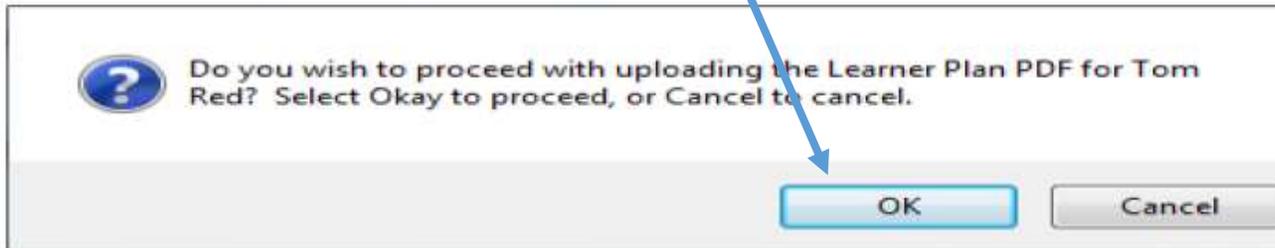
Reason for upload

Reason Plan Item(s) Added/Modified

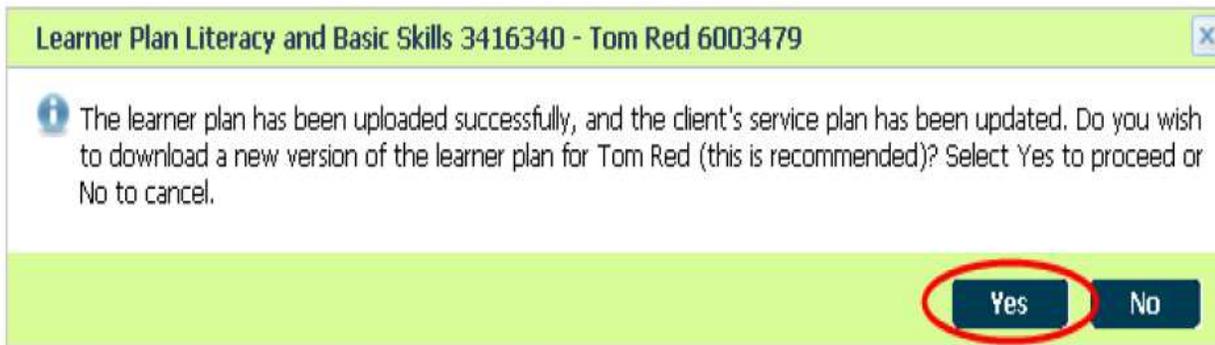
Upload Cancel

42. You will need to confirm the upload by clicking **OK**. The learner plan is now be available to be viewed under the **Upload History** tab. This process can be maintained until the learner plan is ready to be closed.
Be sure to always save and upload the latest learner plan updates to EOIS-CaMS.

Confirm the upload by clicking **OK**.



You will be prompted to proceed if the system detects a previous uploaded plan.



The service plan is now activated!

43. It may happen that you need to Add/Modify/Delete or Cancel sub-goals and plan items. The following desk aids are good references:

http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams_day1/desk aids/eois_cams_adding_sub_goals.pdf

http://www.tcu.gov.on.ca/eng/eopg/eotransformation/cams_day1/desk aids/eois_cams_mod_plan_items.pdf

NOTE: You can only delete an existing plan item that doesn't have an "ACTUAL START DATE" recorded. Otherwise you will need to go to step #47.

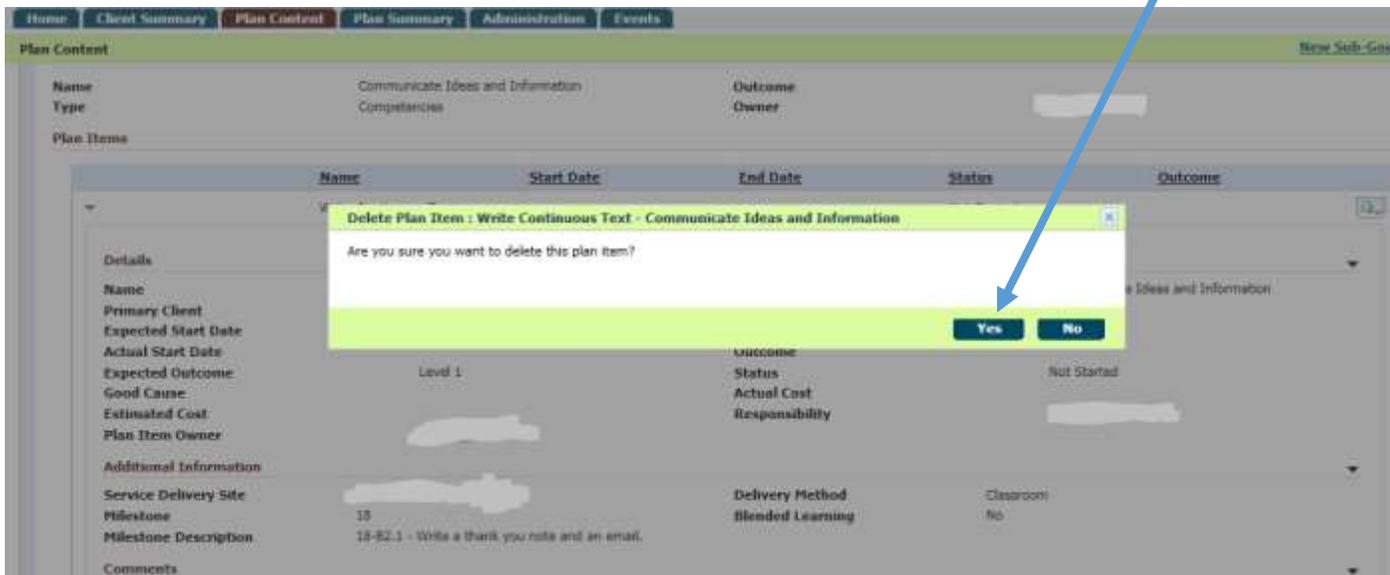
Click on the Action button, and select DELETE PLAN ITEM.

The screenshot displays the 'Plan Content' section of the EOIS-CaMS system. At the top, there is a navigation bar with tabs for Home, Client Summary, Plan Content (selected), Plan Summary, Administration, and Events. Below this, a 'Plan Content' header bar includes a 'New Sub-Goal' button. The main content area shows a plan item with the following details:

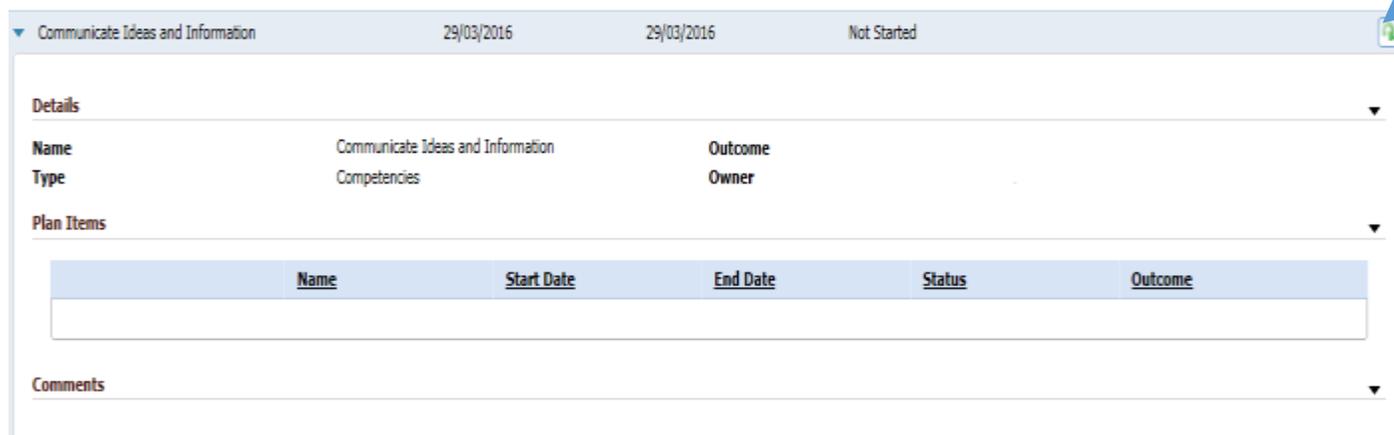
Name	Communicate Ideas and Information	Outcome	Communicate Ideas and Information
Type	Competencies	Owner	
Plan Items			
Name	Start Date	End Date	Status
Write Continuous Text			Not Started
Details			
Name	Write Continuous Text		Sub-Goal
Primary Client			Expected End Date
Expected Start Date	29/03/2016		29/03/2016
Actual Start Date	<input type="text"/>		Actual End Date
Expected Outcome	Level 1		Outcome
Good Cause			Status
Estimated Cost			Not Started
Plan Item Owner			Actual Cost
			Responsibility
Additional Information			
Service Delivery Site			Delivery Method
Milestone	18		Classroom
Milestone Description	18-B2.1 - Write a thank you note and an email.		Blended Learning
			No
Comments			

Two blue arrows point from the text above to the interface: one points to the 'Actual Start Date' field, and the other points to the 'Action' button (a green icon with a trash can) in the top right corner of the plan item row.

44. The following screen will appear: If you are certain you want to delete plan item, then click YES.



45. The plan item will now be removed. The screen will appear as follows. You can also delete the SUB-GOAL by clicking the Action button.



46. The following screen will appear. Click YES to accept and remove the Sub-goal.

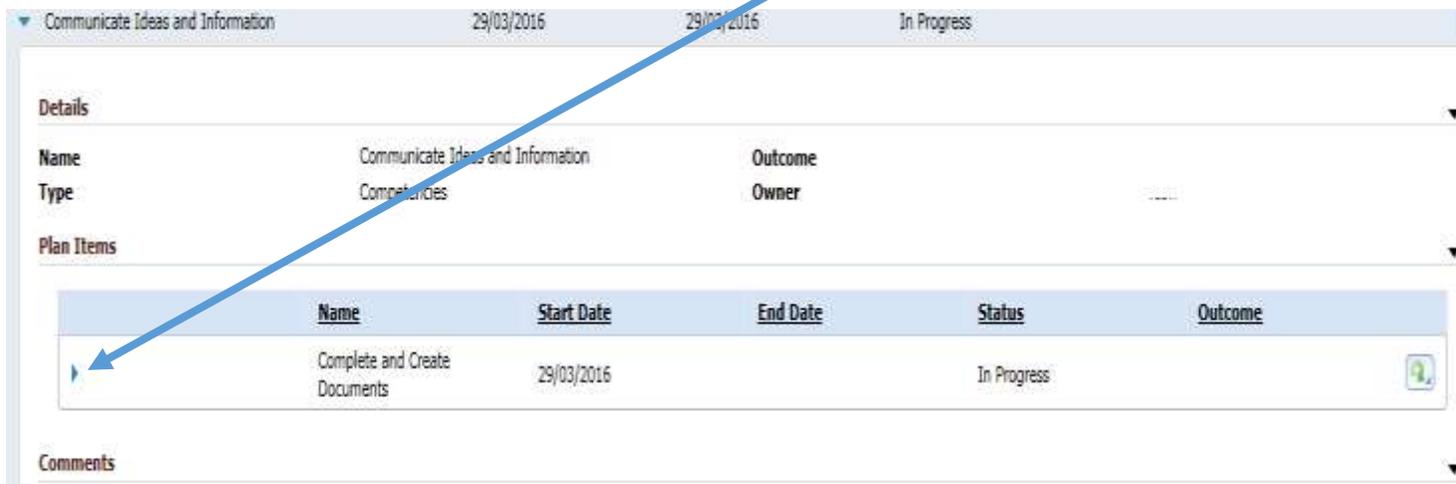
Competencies	Owner
Referral Out to Other Community Resources	27/11/2014
Understand and Use Numbers	28/05/2014
Communicate Ideas and Information	31/12/2014
Understand and Use Numbers	03/12/2014
Learning Activities	
Communicate Ideas and Information	

47. If, however, you have already entered an “ACTUAL START DATE” in the Plan Item (in order words, the status of the Plan Item is “IN PROGRESS”), then you will need to complete the following steps.

First, click on the blue “View” triangle of the SUB-GOAL.

Competencies	Actual Start Date	Actual End Date	Status	Attained
Understand and Use Numbers	03/12/2014	18/01/2015	Completed	
Learning Activities			Not Started	
Communicate Ideas and Information	29/03/2016	29/03/2016	In Progress	
Use Digital Technology	22/03/2012	22/11/2012	Completed	Attained
Understand and Use Numbers	22/03/2012	28/03/2013	Completed	Attained
Communicate Ideas and Information	22/03/2012	04/09/2012	Completed	Attained
Training Supports	17/10/2011	05/08/2016	In Progress	

48. The following screen will appear. Now click on the blue “View” triangle on the PLAN ITEM.



Communicate Ideas and Information 29/03/2016 29/03/2016 In Progress

Details

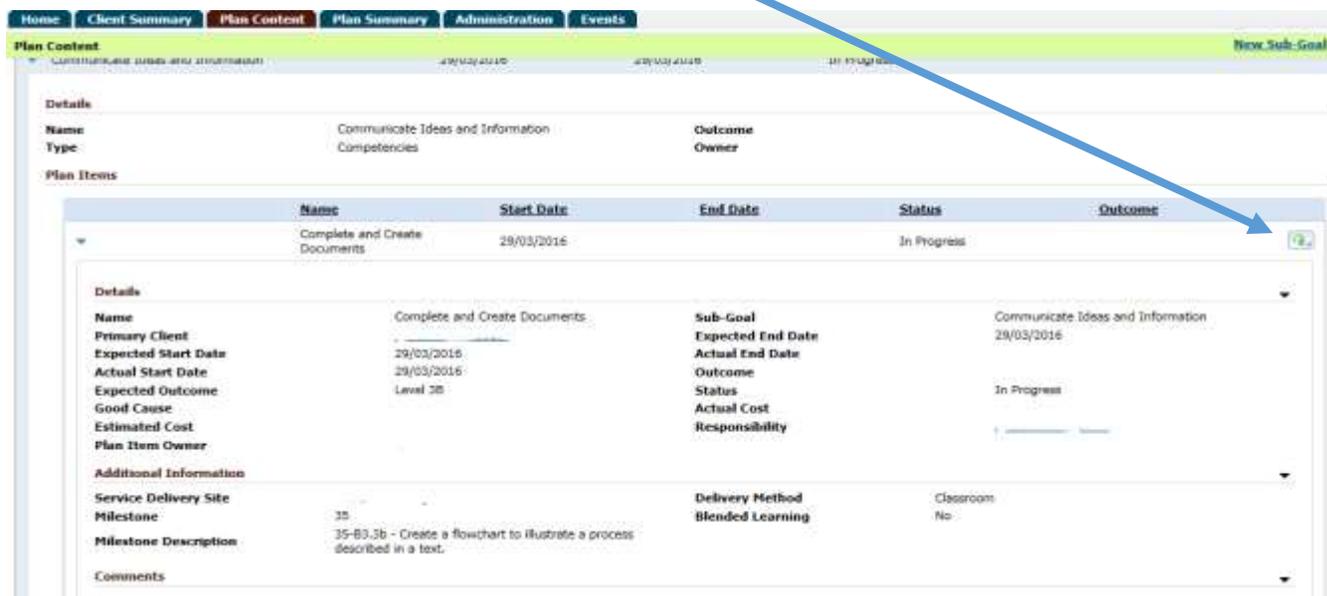
Name Communicate Ideas and Information Outcome
 Type Competencies Owner

Plan Items

Name	Start Date	End Date	Status	Outcome
Complete and Create Documents	29/03/2016		In Progress	

Comments

49. The following screen will appear. Click on the Action button and select EDIT PLAN ITEM.



Home Client Summary **Plan Content** Plan Summary Administration Events

Plan Content New Sub-Goal

Communicate Ideas and Information 29/03/2016 29/03/2016 In Progress

Details

Name Communicate Ideas and Information Outcome
 Type Competencies Owner

Plan Items

Name	Start Date	End Date	Status	Outcome
Complete and Create Documents	29/03/2016		In Progress	

Details

Name Complete and Create Documents Sub-Goal Communicate Ideas and Information
 Primary Client Expected End Date 29/03/2016
 Expected Start Date 29/03/2016 Actual End Date
 Expected Outcome Level 2B Outcome In Progress
 Goal Cause Actual Cost
 Estimated Cost Responsibility

Additional Information

Service Delivery Site
 Milestone 2B Delivery Method Classroom
 Blended Learning No
 Milestone Description 35-B3.3b - Create a flowchart to illustrate a process described in a text.

Comments

50. Now remove the Actual Start Date and enter “CANCELLED” in Outcome, and click SAVE.

Primary Client

Details

Name: Complete and Create Documents

Expected Start Date: 29/03/2016

Actual Start Date: [Empty]

Expected Outcome: Level 3B

Outcome: Cancelled

Expected End Date: 29/03/2016

Actual End Date: [Empty]

Actual Cost: [Empty]

Good Cause: [Empty]

Participant: [Empty]

User: [Empty]

Plan Item Owner: [Empty]

User: [Empty]

Service Delivery Site: [Empty]

Delivery Method: Classroom

Blended Learning:

Milestone: 35-B3.3b - Create a flowchart to illustrate a process described in a text.

Comments: [Empty]

Save Cancel

51. The status for this PLAN ITEM will now change to “Not Started” with a “Cancelled” outcome. You will also see a “Not Started” status under the SUB-GOAL. You have now successfully remove the plan item.

Communicate Ideas and Information		29/03/2016	29/03/2016	Not Started	
Details					
Name	Communicate Ideas and Information	Outcome			
Type	Competencies	Owner			
Plan Items					
Name	Start Date	End Date	Status	Outcome	
Complete and Create Documents			Not Started	Cancelled	
Comments					

Closing the Learner Plan



Below is a quick file checklist to use BEFORE you close the learner's service plan in EOIS-CaMS. **NOTE: once it's closed, it cannot be re-opened.** If you have any comments to add, click on "CHANGE CLOSURE DETAILS", and complete comments section.

- Signed Participant Registration Form
- Intake and Ongoing Assessment Documentation
- Learning Style Assessment
- Release of Information form
- Case Notes
- Copies of correspondence
- Signed and up to date Learner Plan
- Student Agreements(attendance/progress)
- Service Coordination Referred Out documentation
- Completed Milestones and Learning Activities
- Participant Exit and Follow-Up Forms
- Copy of the Learner Satisfaction Survey
- Training Support documentation
- All reported changes are recorded and up-to-date (address, phone numbers, e-mails, goals, education, employment, dates, etc...)

1. Now we can proceed to close the LBS learner service plan in EOIS-CaMS.

Log into EOIS-CaMS and search for the LBS service plan for the learner you wish to close.

Review your file checklist, and ensure that everything is completed, entered and up-to date in the EOIS-CaMS system.

Set your SUB-GOAL outcomes to either ATTAINED, NOT ATTAINED OR CANCELLED.

Now click on PLAN SUMMARY and then on Select.

Service Plan Home

Case Details

Primary Client	Tom Red	Plan Reference Number
Program	Literacy and Basic Skills	Status
Owner	Mister Green [Change Owner]	Closure Reason
Service Delivery Site	ABJ Employment - Toronto [Change Service Delivery Site]	Outcome
Goal	Employment [Change Goal]	Referred In
Start Date	3/7/2014	Closed Date
Self Service Initiated	No	

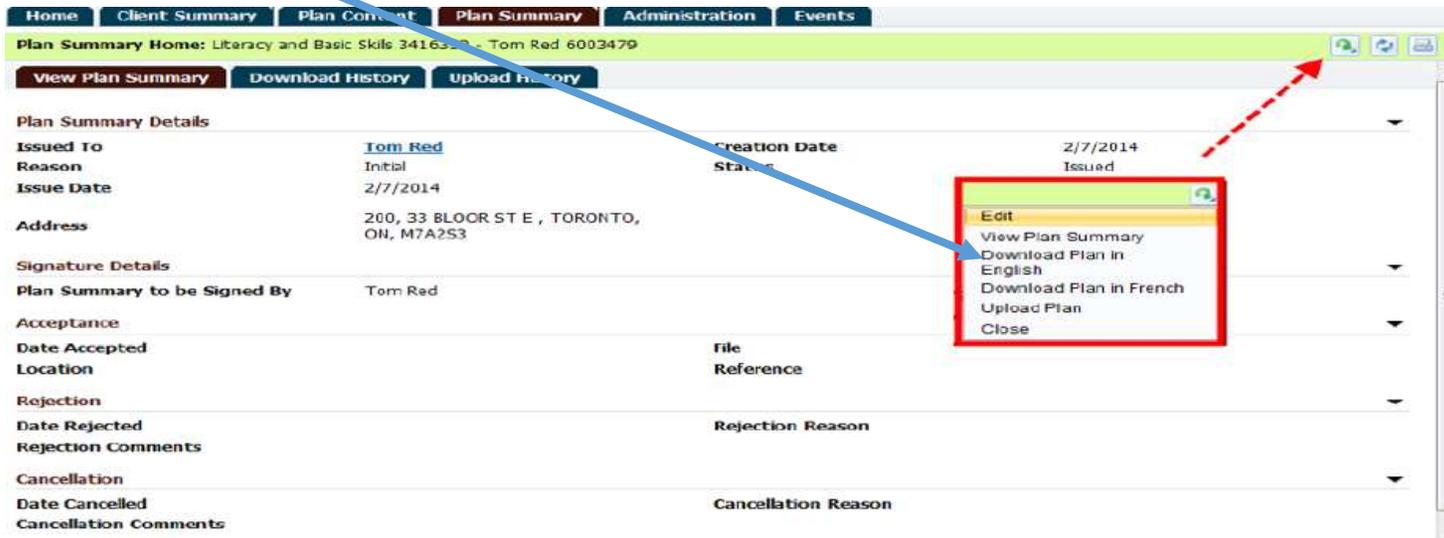
⇒ Step 2: Plan Summary Page

Click SELECT.

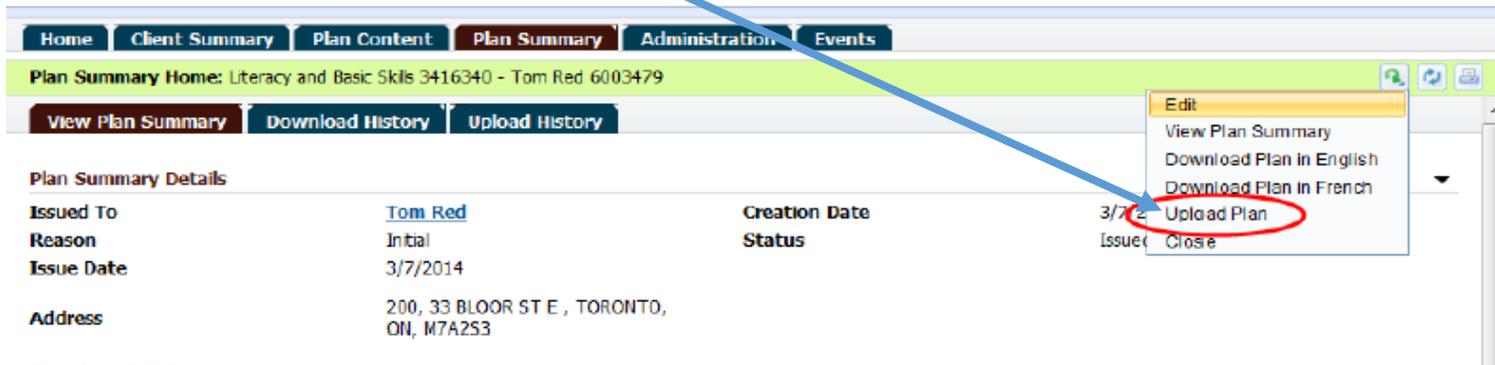
Plan Summary

Action	Issued To	Date Issued	Status
Select	Tom Red	2/7/2014	Issued

- Next, download once again the updated Learner Plan and save as a PDF file on a secure drive. Add missing fields (if any) to update the learner plan. Click **SAVE**.



- You will now retrieve the saved Learner Plan file from your secure drive and then select **UPLOAD PLAN**.



4. You will have the following message appear on your screen. Retrieve the updated PDF learner plan file to upload by clicking Browse. Select Reason as "CLOSE SERVICE PLAN". Then Click on UPLOAD.

Upload Learner Plan Literacy and Basic Skills 3416340 - Tom Red 6003479 * required field

Select file to upload

File

Reason for upload

Reason

5. Confirm by clicking OK.

Do you wish to proceed with uploading the Learner Plan PDF for Tom Red? Select Okay to proceed, or Cancel to cancel.

6. You will need to assign a reviewer. The person you assign will be the person responsible for the Follow-ups for this learner.

Close Service Plan Literacy and Basic Skills 3416340 - Tom Red 6003479 * required field

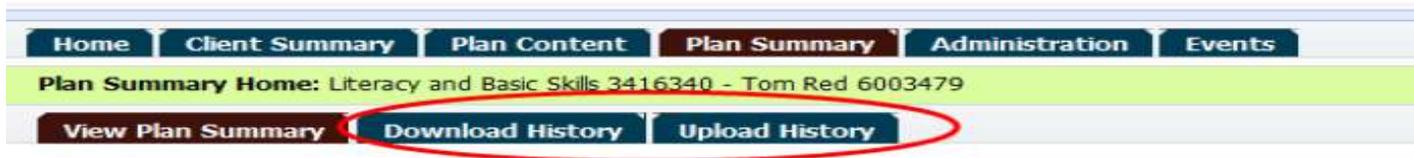
Uploading a closed Learner Plan will close the Service Plan. To close this service plan select Yes and a Reviewer. Select No to cancel.

Reviewer

7. A confirmation will appear stating you have successfully uploaded, updated and closed the client's service plan.



8. You can view the UPLOAD and DOWNLOAD HISTORY of your files by selecting the appropriate TABS.



The Download History page lists the date of download and the user who requested:

Home **Client Summary** **Plan Content** **Plan Summary** **Administration** **Events**

Download History: Literacy and Basic Skills 3416340 - Tom Red 6003479 [Close](#) [Refresh](#) [Print](#)

View Plan Summary **Download History** **Upload History**

Issued To	Date Issued	Status
Tom Red	3/7/2014	Accepted

Download Date	Requested By
3/7/2014 14:25	Mister Green
3/7/2014 14:38	Mister Green
3/7/2014 14:53	Mister Green

Entering Resource, Information and Referral Data

SERVICE COORDINATION

REFERRALS

INFORMATION SESSIONS

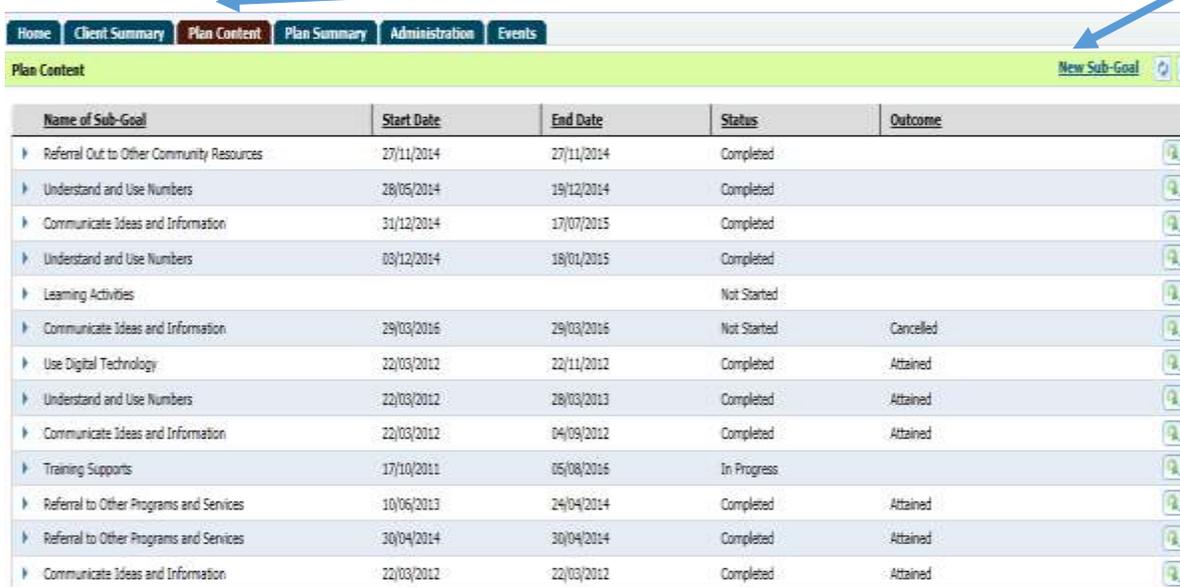
FOLLOW-UPS

OUTREACH ACTIVITIES



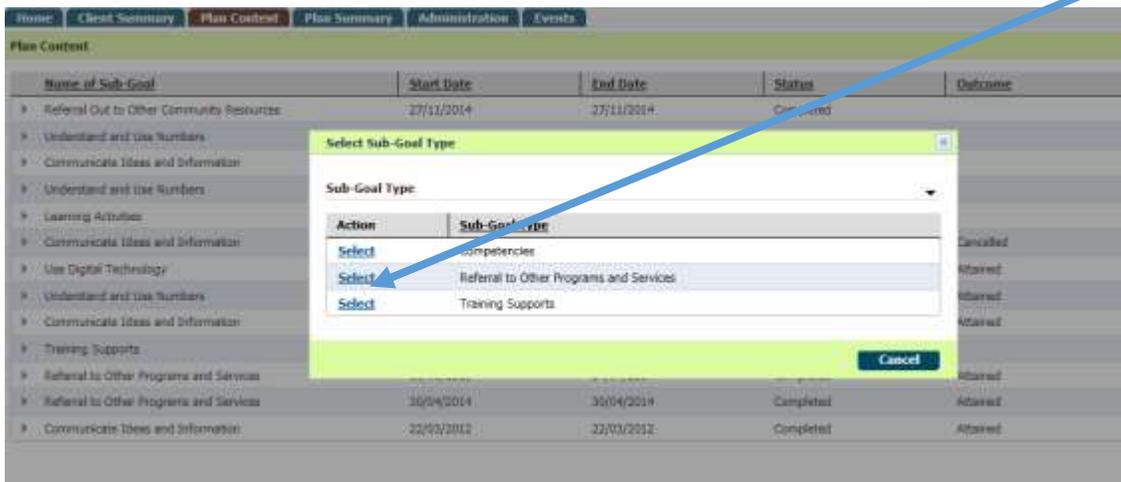
IT'S ALL PART OF THE CONTRACT!

1. Part of the contractual agreement with MTCU requires that all LBS sites record and document **Learner Referrals** made to Other Programs and Services. To enter this information into EOIS-CaMS, select **PLAN CONTENT** and click on **NEW SUB-GOAL**.



Name of Sub-Goal	Start Date	End Date	Status	Outcome
Referral Out to Other Community Resources	27/11/2014	27/11/2014	Completed	
Understand and Use Numbers	28/05/2014	19/12/2014	Completed	
Communicate Ideas and Information	31/12/2014	17/07/2015	Completed	
Understand and Use Numbers	03/12/2014	18/01/2015	Completed	
Learning Activities			Not Started	
Communicate Ideas and Information	29/03/2016	29/03/2016	Not Started	Cancelled
Use Digital Technology	22/03/2012	22/11/2012	Completed	Attained
Understand and Use Numbers	22/03/2012	28/03/2013	Completed	Attained
Communicate Ideas and Information	22/03/2012	04/09/2012	Completed	Attained
Training Supports	17/10/2011	05/08/2016	In Progress	
Referral to Other Programs and Services	10/06/2013	24/04/2014	Completed	Attained
Referral to Other Programs and Services	30/04/2014	30/04/2014	Completed	Attained
Communicate Ideas and Information	22/03/2012	22/03/2012	Completed	Attained

2. The following screen will appear. Click on the Select button for Referral to Other Programs and Services.



Name of Sub-Goal	Start Date	End Date	Status	Outcome
Referral Out to Other Community Resources	27/11/2014	27/11/2014	Completed	
Understand and Use Numbers				
Communicate Ideas and Information				
Understand and Use Numbers				
Learning Activities				
Communicate Ideas and Information				Cancelled
Use Digital Technology				Attained
Understand and Use Numbers				Attained
Communicate Ideas and Information				Attained
Training Supports				Attained
Referral to Other Programs and Services				Attained
Referral to Other Programs and Services	30/04/2014	30/04/2014	Completed	Attained
Communicate Ideas and Information	22/03/2012	22/03/2012	Completed	Attained

Action	Sub-Goal Type
Select	competencies
Select	Referral to Other Programs and Services
Select	Training Supports

3. Depending on the Type of Referral, you will need to select from the following two choices. For this example, we will choose Referral to Other Programs and Services.

Name of Sub-Goal	Start Date	End Date	Status	Outcome									
Referral Out to Other Community Resources	27/11/2014	27/11/2014	Completed										
Understand and Use Numbers	28/05/2014	19/12/2014	Completed										
Communicate Ideas and Information	Select Sub-Goal												
Understand and Use Numbers	<table border="1"> <thead> <tr> <th>Action</th> <th>Name</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Select</td> <td>Referral Out to Other Community Resources</td> <td></td> </tr> <tr> <td>Select</td> <td>Referral to Other Programs and Services</td> <td></td> </tr> </tbody> </table>				Action	Name	Description	Select	Referral Out to Other Community Resources		Select	Referral to Other Programs and Services	
Action	Name	Description											
Select	Referral Out to Other Community Resources												
Select	Referral to Other Programs and Services												
Learning Activities													
Communicate Ideas and Information													
Use Digital Technology													
Understand and Use Numbers													
Communicate Ideas and Information													
Training Supports													
Referral to Other Programs and Services	10/06/2013	24/04/2014	Completed	Attained									
Referral to Other Programs and Services	30/04/2014	30/04/2014	Completed	Attained									
Communicate Ideas and Information	22/03/2012	22/03/2012	Completed	Attained									

4. Click on the blue “View” triangle. Then click on the Action button and select ADD PLAN ITEM.

Referral to Other Programs and Services Not Started

Details

Name	Referral to Other Programs and Services	Outcome	
Type	Referral to Other Programs and Services	Owner	

Plan Items

Name	Start Date	End Date	Status	Outcome

Comments

5. The following screen with PLAN ITEM selection will appear.

Note: a good practice for each site is to create a list of community agency names you most often deal with and associate them with this list of Plan Items. For our example, we will choose the Post-Secondary Education plan item.

Plan Item

Action	Name	Plan Item Type	Description
Select	Credential Assessment	Basic Plan Item	
Select	Custom Basic Plan Item	Custom Plan Item	
Select	EO – Action Center	Basic Plan Item	
Select	EO – Apprenticeship Program – Co-op Diploma Apprenticeship Program	Basic Plan Item	
Select	EO – Apprenticeship Program – Other	Basic Plan Item	
Select	EO – Apprenticeship Program – Pre-Apprenticeship Program	Basic Plan Item	
Select	EO – Employment Service Provider	Basic Plan Item	
Select	EO – EO Service Provider – Other	Basic Plan Item	
Select	EO – Literacy and Basic Skills Service Provider	Basic Plan Item	
Select	EO – Local Boards	Basic Plan Item	
Select	EO – Ontario Job Bank	Basic Plan Item	
Select	EO – RRTS	Basic Plan Item	
Select	General Education Development	Basic Plan Item	
Select	Government Services Municipal	Basic Plan Item	
Select	Government Training Federal – Other	Basic Plan Item	
Select	Government Training Federal – Youth Employment Strategy	Basic Plan Item	
Select	Government Training Provincial – Other	Basic Plan Item	
Select	High School	Basic Plan Item	
Select	Independent Learning Centre	Basic Plan Item	
Select	Language Services – Training	Basic Plan Item	
Select	Ministry of Citizenship and Immigration-Bridge Training for Immigrants	Basic Plan Item	
Select	Ministry of Citizenship and Immigration – Other	Basic Plan Item	
Select	Ontario Disability Support Program	Basic Plan Item	
Select	Ontario Internship Program	Basic Plan Item	
Select	Ontario Women's Directorate	Basic Plan Item	
Select	Ontario Works	Basic Plan Item	
Select	Other – structured/formal referral	Basic Plan Item	
Select	Post-Secondary Education	Basic Plan Item	

[Cancel](#)

- The following screen will appear. Enter the expected start and end dates; otherwise, EOIS-CAMS will default to today's date. Enter the EXPECTED OUTCOME from the following three choices: Referred at Entrance, Referred during Service, or Referred at Exit. You can add comments if needed. For our example, we will enter that student is taking the post-secondary Pre-Health Program. Click SAVE.

Add Plan Item: Literacy and Basic Skills * required field

Details

Sub-Goal Referral to Other Programs and Services **Name** Post-Secondary Education

Primary Client -

Expected Start Date * 30/03/2016 **Expected End Date *** 30/03/2016

Expected Outcome * Referred at Entrance **Estimated Cost**

Responsibility

Me **User**

Sub-Goal Owner **Participant**

Plan Item Owner

Sub-Goal Owner **User**

Additional Information

Service Delivery Site * **Delivery Method**

Blended Learning

Milestone

Comments

Pre-Health

Save **Cancel**

- Click on the Referral to Other Program and Services blue "View" triangle.

▶ Referral to Other Programs and Services	30/03/2016	30/03/2016	Not Started	
---	------------	------------	-------------	--

Comments

8. The following screen will now appear. Click on the Action button, choose Edit Plan item to add actual start date to the plan item and SAVE. The status will now change from “not started” to in progress. When plan item is completed, update with actual end date and enter Outcome.

Referral to Other Programs and Services 30/03/2016 30/03/2016 Not Started

Details

Name Referral to Other Programs and Services **Outcome**

Type Referral to Other Programs and Services **Owner**

Plan Items

Name	Start Date	End Date	Status	Outcome
Post-Secondary Education			Not Started	

9. Here’s an example of a completed Plan Item with an Attained outcome. As well, the outcome of the SUB-GOAL is completed and ATTAINED.

NOTE: all Sub-goals need to have a defined OUTCOME (Attained, Not Attained or Cancelled) before the service plan can be closed

Referral to Other Programs and Services 22/03/2016 22/03/2016 Completed Attained

Details

Name Referral to Other Programs and Services **Outcome** Attained

Type Referral to Other Programs and Services **Owner**

Plan Items

Name	Start Date	End Date	Status	Outcome
Post-Secondary Education	22/03/2016	22/03/2016	Completed	Attained

Details

Name Post-Secondary Education **Sub-Goal** Referral to Other Programs and Services

Primary Client

Expected Start Date 22/03/2016 **Expected End Date** 22/03/2016

Actual Start Date 22/03/2016 **Actual End Date** 22/03/2016

Expected Outcome Referred at Exit **Outcome** Attained

Good Cause

Estimated Cost

Plan Item Owner

Actual Cost

Responsibility

Additional Information

Service Delivery Site

Milestone

Milestone Description

Delivery Method Blended Learning **Status** No

Comments

HVTN

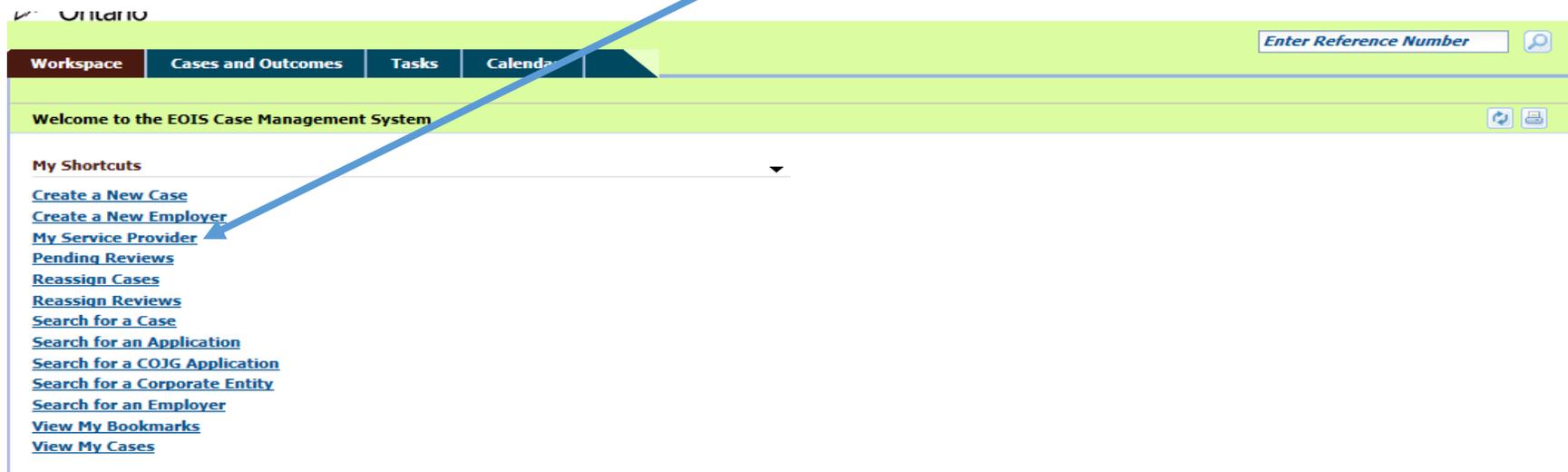
10. As part of your contractual Service Coordination commitment (and as a good practice for client service), your agency may refer potential clients to other LBS providers if they are not suitable for service at your agency. They may also be referred out to other programs and services in the community. Therefore, these clients never become registered learners at your site.

As well, your agency may provide unassisted services such as Information Sessions and Outreach activities.

These types of data are captured and entered on a monthly basis in the AGGREGATE DATA section of the EOIS-CaMS system. Follow these steps to enter this information.

NOTE: only those with either the SPRA role and/or SERVICE PROVIDER MANAGER role can add this data.

11. Start by navigating to WORKSPACE, and click on MY SERVICE PROVIDER:



12. The following screen will appear. Now click on your site REFERENCE NUMBER.

The screenshot shows the 'Service Provider Home' screen for 'COLLEGE OF APPLIED ARTS & TECHNOLOGY'. The page includes a header with the organization's name and a navigation menu with 'Home', 'Service Provider Members', and 'Contact'. The main content area is divided into sections: 'Service Provider Home' (showing IFIS Status as Active), 'Details' (showing Business Name, Preferred Language, CRA Business Number, NAICS Code, Max Number of Users, and Contact Details), and 'Service Delivery Sites'. The 'Service Delivery Sites' section contains a table with the following data:

Reference Number	Service Delivery Site Name	Provider Status
A	College	Active
B	College	Active
C	College	Active
D	COLLEGE	Active

A blue arrow points to the 'Reference Number' field in the first row of the 'Service Delivery Sites' table.

13. Then your Service Delivery Site Home screen will appear. Click on SERVICES.

The screenshot shows the 'Service Delivery Site Home' screen for 'College'. The page includes a header with the site name and a navigation menu with 'Home', 'Contact', 'Services', and 'Service Delivery Site Members'. The main content area is divided into sections: 'Service Delivery Site Home' (showing Service Provider, Business Name, and Details), 'Details' (showing Service Delivery Site Name, Preferred Language, Preferred Communication, Available For Service, Geographic Region, and Notification), and 'Notification' (showing Self Service Notifications and Email Address). The 'Services' tab is highlighted in the navigation menu, and a blue arrow points to it.

14. The next Services screen will appear. Click on LITERACY AND BASIC SKILLS.

COLLEGE OF APPLIED ARTS &... x College

Service Delivery Site Name: College
 Preferred Language: English
 Geographic Region: Northern Region
 Reference Number: -- --
 Designated Francophone: No
 Status: Active

Home Contact Services Service Delivery Site Members

Services [New](#)

Name	Start Date	End Date	Ministry Contact	Case Reviewer	Status
Literacy and Basic Skills	23/04/2015		N... B...		Approved

15. The following screen will appear. Click on the AGGREGATE DATA tab.

COLLEGE OF APPLIED ARTS &... x College - x Service Home - LBS Service Delivery x

Service Home - LBS Service Delivery

Start Date: 23/04/2015
 Status: Approved
 End Date:
 Ministry Contact: [N... B...](#)

Home Business Plans **Aggregate Data** Recent Changes

Service Home [Edit](#) [Delete](#)

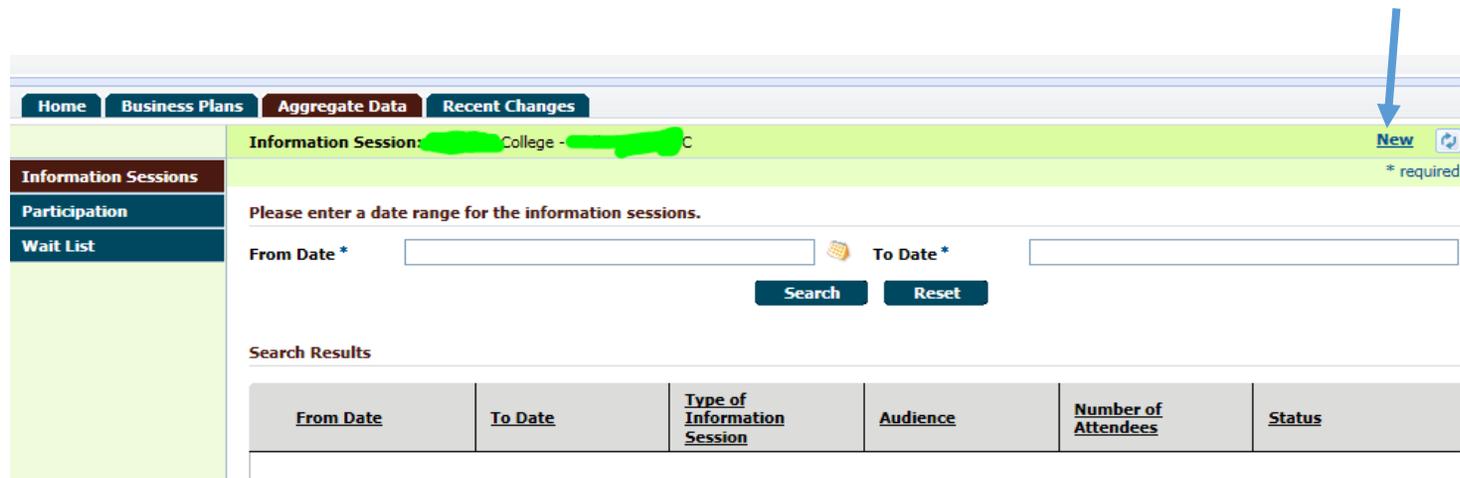
Service Delivery Site

Name: College Reference Number: [11111](#)

Details

Name: [LBS Service Delivery](#)
 Start Date: 23/04/2015
 End Reason:
 Status: Approved
 End Date:
 Ministry Contact: [N... B...](#)
 Case Reviewer:

16. The following screen will appear. You are now ready to enter your Information Sessions (if applicable). Click **NEW**.



The screenshot shows the main interface of the EOIS-CaMS system. At the top, there are navigation tabs: Home, Business Plans, Aggregate Data, and Recent Changes. Below these, there is a header for 'Information Sessions' with a 'New' button and a refresh icon. A blue arrow points to the 'New' button. Below the header, there is a section for entering a date range for the information sessions, with fields for 'From Date' and 'To Date', and buttons for 'Search' and 'Reset'. Below this is a 'Search Results' section with a table header.

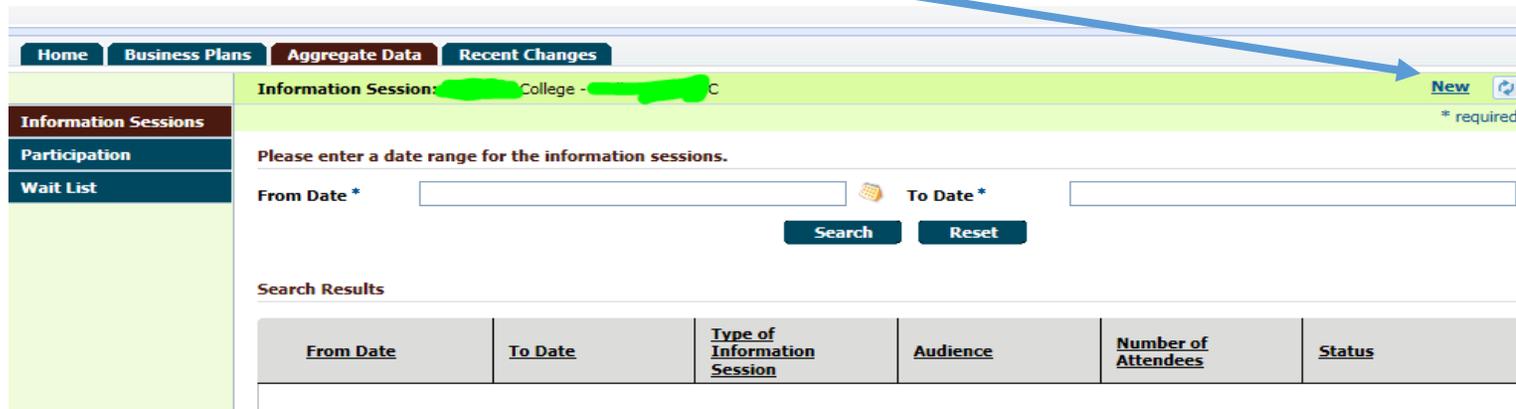
From Date	To Date	Type of Information Session	Audience	Number of Attendees	Status
-----------	---------	-----------------------------	----------	---------------------	--------

17. The following pop-screen will appear. Complete your information session details and click **SAVE**.



The screenshot shows a 'Create Information Session' pop-up form. The form has a title bar with a close button and a '* required field' indicator. The form is divided into sections: 'Information Session' with a dropdown menu, 'Description' with a text area, 'Details' with fields for 'Audience', 'Number of Attendees', 'From Date', and 'To Date', and 'Comments' with a text area. At the bottom, there are three buttons: 'Save', 'Save & New', and 'Cancel'.

18. Now to complete the Outreach activity section. Click NEW:



The screenshot shows the 'Aggregate Data' tab selected in the top navigation bar. Below the navigation bar, there is a header for 'Information Session: [redacted] College - [redacted] C'. A blue arrow points from the text 'Click NEW:' to a 'New' button with a refresh icon, which is marked as '* required'. Below this, there is a section for entering a date range for information sessions, with 'From Date' and 'To Date' input fields, a 'Search' button, and a 'Reset' button. Below the search section is a 'Search Results' table with the following columns: From Date, To Date, Type of Information Session, Audience, Number of Attendees, and Status.

19. Under the Type of Information session, select OUTREACH, provide a description on the outreach activity you did, details on the audience served and enter dates. Click SAVE.



The screenshot shows the 'Create Information Session' dialog box. The 'Type of information session' dropdown is set to 'Outreach'. The 'Description' field contains 'Independent Living'. Under the 'Details' section, the 'Audience' dropdown is set to 'General public', and the 'Number of Attendees' is set to '6'. The 'From Date' is '01/03/2016' and the 'To Date' is '31/03/2016'. There is a 'Comments' text area at the bottom. At the bottom of the dialog, there are three buttons: 'Save', 'Save & New', and 'Cancel'.

20. Now you're ready to record the "Participant Information" for individuals you referred to other LBS programs and/or other program and services. Click on PARTICIPATION. Then Click NEW.

Year/Month	# Individuals Served	# Individuals referred to other literacy providers	# Individuals referred to other programs/services	Last Updated
▶ 2012/10	10	8	2	06/02/2013 15:51
▶ 2012/11	13	8	5	06/02/2013 15:53
▶ 2013/01	14	10	4	08/02/2013 11:30
▶ 2012/12	6	6	0	06/02/2013 15:45
▶ 2013/02	15	8	7	08/03/2013 16:09
▶ 2013/03	6	4	2	01/04/2013 13:04

21. The following pop-up screen will appear. Complete the details and SAVE. If your site has a Wait List, choose the appropriate tab and record.

Create Participation: [College Name] C

* required field

Details

Year * Month *

Individuals Served * # Individuals referred to other literacy providers *

Individuals referred to other programs/services *

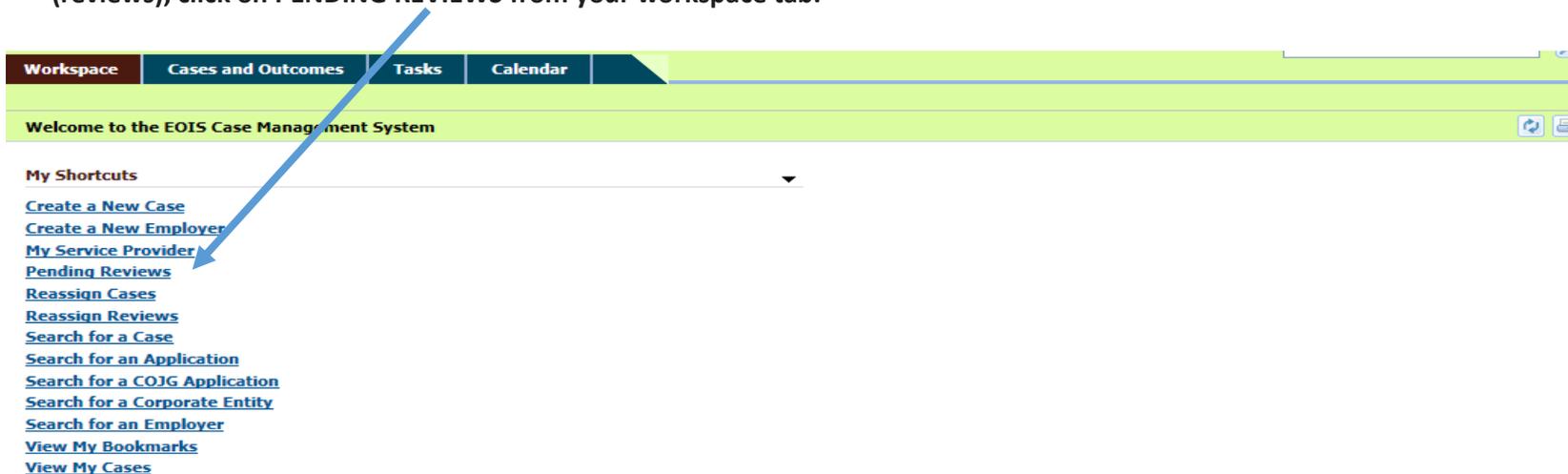
Comments

Entering 3, 6, and 12-month Follow-ups

It's been 3 months since you closed your plan. It's time for the follow-ups!



1. When a service plan is closed, the system will automatically create a 3-month follow-up (“REVIEW”) for LBS. Once the 3-month follow-up is completed, then the 6-month review will be generated and subsequently the 12-month follow-up event. To complete your follow-ups (reviews), click on PENDING REVIEWS from your workspace tab.



2. EOIS-CaMS will display a list of cases, review types (3-month, 6-months, 12-month and corresponding review dates. Click on the **CASE REFERENCE** to pull-up the reviews.

Pending Reviews x

Pending Reviews

Case Reference	Program	Primary Client	Review Type	Review Date
501	Literacy and Basic Skills	K.	Outcome at 6 months	02/04/2016
794	Literacy and Basic Skills	K.	Outcome at 6 months	02/04/2016
672	Literacy and Basic Skills	M.	Outcome at 6 months	02/04/2016
558	Literacy and Basic Skills	J.	Outcome at 3 months	04/04/2016
658	Literacy and Basic Skills	J.	Outcome at 6 months	06/04/2016
7791	Literacy and Basic Skills	D.	Outcome at 6 months	07/04/2016
038	Literacy and Basic Skills	A.	Outcome at 6 months	07/04/2016
940	Literacy and Basic Skills	C.	Outcome at 6 months	07/04/2016
110	Literacy and Basic Skills	C.	Outcome at 6 months	08/04/2016
617	Literacy and Basic Skills	C.	Outcome at 12 months	08/04/2016
1048	Literacy and Basic Skills	I.	Outcome at 12 months	08/04/2016
8907	Literacy and Basic Skills	St.	Outcome at 6 months	08/04/2016
2599	Literacy and Basic Skills	I.	Outcome at 6 months	08/04/2016

3. Typically, the attempts are made to contact the completed learner and outcomes are then recorded. The first attempt made would be considered as the actual start date and the last attempt made would be considered the actual end date recorded for each of the follow-up types. The following LBS learner service plan will display. Click on the **EVENTS** tab. Then, click on the **Action** button.

Pending Reviews x LBS () x

Program Literacy and Basic Skills Status Closed
 Start Date 31/08/2015 Closed Date 02/10/2015
 Owner Service Delivery Site Colleg.

Home Client Summary Plan Content Plan Summary Administration **Events**

Events

Calendar View List View Case Review

Event	Start Date	End Date	Action
▶ Case Review	02/04/2016		
▶ Case Review	02/01/2016	02/01/2016	
▶ Plan Closed	02/10/2015	02/10/2015	
▶ Plan Approved	31/08/2015	31/08/2015	

4. You can then enter your review outcomes in the specified field and SAVE. Your review is now complete. The 12-month review will appear in your PENDING REVIEW link.

Details

Reviewer	Mister Green	Reason	Outcome at 6 months
Scheduled Date	3/10/2014	Actual Start Date	3/10/2014
Expected End Date	3/10/2014	Actual End Date	3/10/2014
Outcome	Employed Full-Time	Did your training help prepare you for future employment?	YES

Save Cancel

5. A very useful report for follow-ups is the Service Provider Follow up Cases (Service Plan) # 19-A. This report shows service plan follow-up reviews that are overdue or due within the next 30 days.

NOTE: in order to access the CaMS reports, you must be registered in your client profile to have access to the Reports section of EOIS.

Must-have Tools: EOIS-CaMS Reports

Follow-Up Cases

#19A

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

Inactive Cases

#20

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

LBS All Data- Information & Referral

#60A, #60B, #60D

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

LBS Case Activity

#61

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

Detailed Service Quality

#64

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

The links on this page take you to the EOIS-CaMS “Report Guides” which explain the data contained in each report and where it comes from in the CaMS system.

NOTE: in order to view the actual CaMS reports, you must access the “EOIS – CaMS Reporting” link on the “My Services” page of EOIS.