Effective Information Management for LBS through the Employment Ontario Information System Case Management System (EOIS-CaMS)

June 9, 2012

Laubach Literacy Ontario Conference

Waterloo, ON

Presented by: Robyn Cook-Ritchie

Session Description

EOIS-CaMS is Employment Ontario’s primary mechanism for information management, service coordination and corporate reporting.

This session provides opportunity to share insights so that LBS managers start to understand the performance management system and the connection to EOIS-CaMS.

EOIS-CaMS and the LBS Performance Management Framework

The Performance Management Framework includes dimensions of success and core measures to assess both the service provider performance and the overall performance of the LBS Program. The information related to **effectiveness, customer service and efficiency** is captured in EOIS-CaMS.

Source: Service Provider Guidelines Effective April 2, 2012

Key Documentation

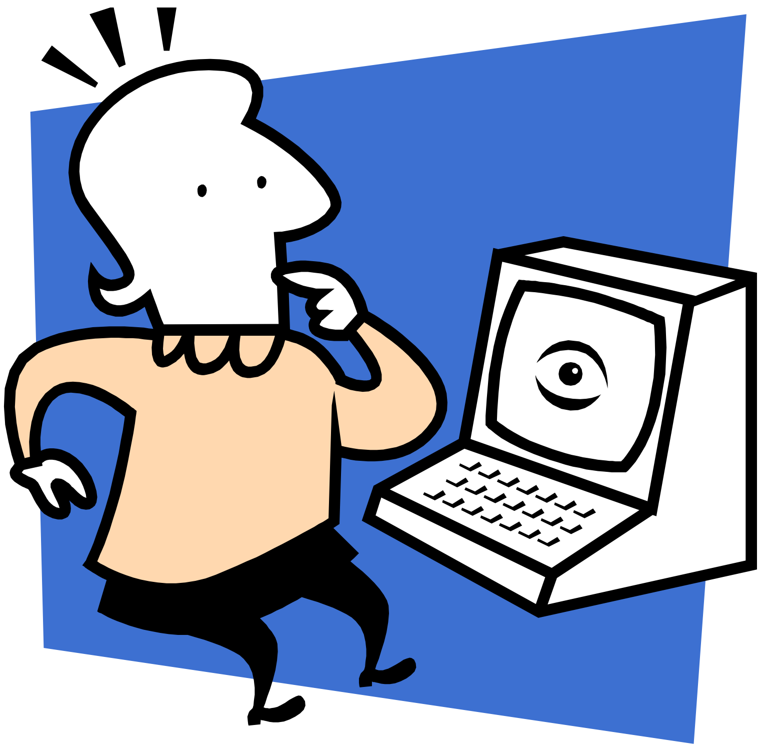
- EOIS Case Management System Service Provider User Guide:
  - Chapter 5
  - Chapter 6
  - Chapter 8b

- Literacy and Basic Skills Service Provider Guidelines (effective April 2, 2012)

- Literacy and Basic Skills Learner Carryover and Transition Guide for April 2012

All found on the Employment Ontario Partner's Gateway:

http://www.tcu.gov.on.ca/eng/eopg/



What is a CASE?

There are three types of cases:

- Integrated case (Employment Ontario case)*
- Service Plan*
- Product Delivery case

A client can only have one EO case but can have multiple service plans and product delivery cases.

LBS service providers will generate both **EO cases** and **Service Plans**.

Employment Ontario Case

Once an Employment Ontario case is created:

- Service providers can see all the programs and services that a client is participating in or has participated in
- Service Providers can link to the person's home page and edit profile information
- TCU can create "products" for a client such as a Second Career product delivery case
- Service providers can create service plans

Service Plans

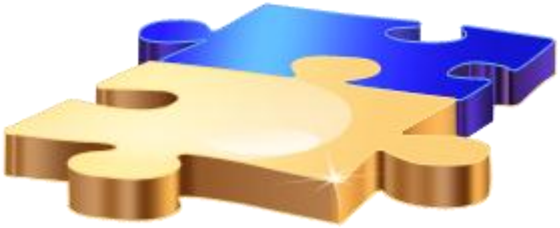
- Customized to the program
- Outcomes-based
- Used to plan, track and monitor client participation in a program

Three types of service plans currently:

1. Employment Service Plan
2. Summer Jobs Service Plan
3. **Literacy and Basic Skills Service Plan**

Before you start! Screening

- Intake assessment includes high level screening to establish if literacy is what a client needs and to make sure that the services provided by LBS are right for the client. The learner’s general level of ability and goal are typically determined at intake.



- Once it is determined that the LBS service and the client are a good fit, the service provider will, together with the client, complete the LBS Participant Registration form which is required to set-up the client in EOIS-CaMS.

Learner Eligibility and Suitability

The LBS program focuses on adults who reside in Ontario that are unemployed, with special emphasis on people receiving income support. The LBS program is also open to employed Ontarians who need to improve their literacy and basic skills in order to maintain or upgrade their work skills.

Eligibility

LBS provider must ensure each learner is:

- An Ontario resident
- An adult whose literacy and basic skills are assessed at intake at being less than end of Level 3 of the IALSS or the OALCF
- At least 19 years old: on an exceptional basis, LBS service providers may serve young adults between ages 16 and 19 who demonstrate the maturity to benefit from adult education. However, returning to the regular school system should be the priority for these learners. LBS service providers may allow age exceptions, not exceeding ten percent of learners enrolled in a fiscal year. **In individual cases, there must be a documented rationale in the learner's file.**
- Proficient enough in speaking and listening to benefit fully form the language of LBS instruction (English or French). **CLB level 6 for speaking and listening is the recommended minimal level of proficiency required** to benefit from LBS instruction. This eligibility requirement does not apply to a Deaf learner.

Source: Service Provider Guidelines Effective April 2, 2012

1. Develop a standard form to document rationale.
2. Add a CLB 6 reference sheet to your assessment package.

- The effectiveness of the LBS program will be measured by who the service provider serves, **Suitability/Learner Profile**, and by what the LBS program achieves through the three measures: Learner Progress, Completion of Goal Path and Learner Gains.

- **Suitability/Learner Profile (10%)** is a measure of who is being served. It examines and quantifies identified client barriers to learners. This measure ensures that the service providers are providing service to the clients who can most benefit from the LBS Program.

Source: Service Provider Guidelines Effective April 2, 2012

Service providers must serve clients who, on average, are experiencing at least 25% of the suitability indicators (proposed standard at maturity). This does not mean that every single client must have at least 25% of the identified indicators (some clients may have more and others may have fewer and the combination does not matter).

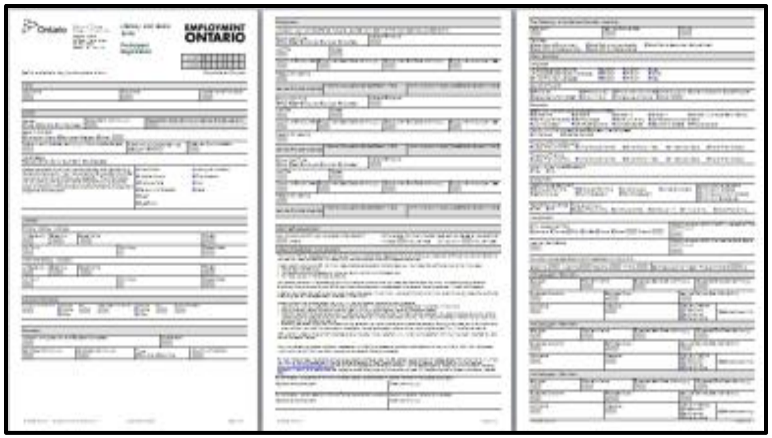
INDICATORS OF SUITABILITY	DEFINITION
Education level attained	The highest education level the individual has completed at service/program entrance is: • < grade 12.
Source of Income	The individual has indentified his/her source of income as one of the following: • Ontario Works (OW) • Ontario Disability Support Program (ODSP) • No source of income • Crown Ward extended care and maintenance
Time out of school, or training	The individual has been out of education or without being involved with training for 6 years or more
Age	The individual is: older than 45 years of age and under 65
History of interrupted education	The individual has identified that he/she has had a history of interrupted primary and secondary education.
Person with Disability	The individual has self-identified as a person with a disability as defined by the Accessibility for Ontarians with Disabilities Act (AODA) and Ontario Human Rights Code definition Includes persons who have: • any degree of physical disability, infirmity, malformation or disfigurement that is caused by bodily injury, birth defect or illness and, without limiting the generality of the foregoing, includes diabetes mellitus, epilepsy, a brain injury, any degree of paralysis, amputation, lack of physical co-ordination, blindness or visual impediment, deafness or hearing impediment, muteness or speech impediment, or physical reliance on a guide dog or other animal or on a wheelchair or other remedial appliance or device; • a condition of mental impairment or a developmental disability; • a learning disability, or a dysfunction in one or more of the processes involved in understanding or using symbols or spoken language; • a mental disorder; or • an injury or disability for which benefits were claimed or received under the insurance plan established under the Workplace Safety and Insurance Act, 1997 ("handicap").
Aboriginal Person	The constitutional and treaty rights of the Aboriginal peoples of Canada are recognized and affirmed in the Constitution Acts of 1867 and 1982 (section 35). Section 35(2) indicates that Aboriginal peoples of Canada include Indian (status or non-status), Inuit, and Métis, or a person of Aboriginal ancestry.
Deaf	The individual has self-identified as Deaf.
Deafblind	The individual has self-identified as Deafblind
Francophone	The individual has self-identified as a person whose first language or official language spoken at home is French.

Source: Service Provider Guidelines Effective April 2, 2012

3 Major Steps

1. Create Employment Ontario Case
2. Build the Client Profile
3. Create the Literacy and Basic Skills Service Plan

Step 1: Create an Employment Ontario Case


EMPLOYMENT ONTARIO

You will use the information captured on the first page of the **Participant Registration Form (PRF)** to create the Employment Ontario (EO) case in EOIS-CaMS.

This consent portion of this form (PRF) on page 2 **MUST** be completed/signed by the client **BEFORE** any data can be entered into the system.

Privacy

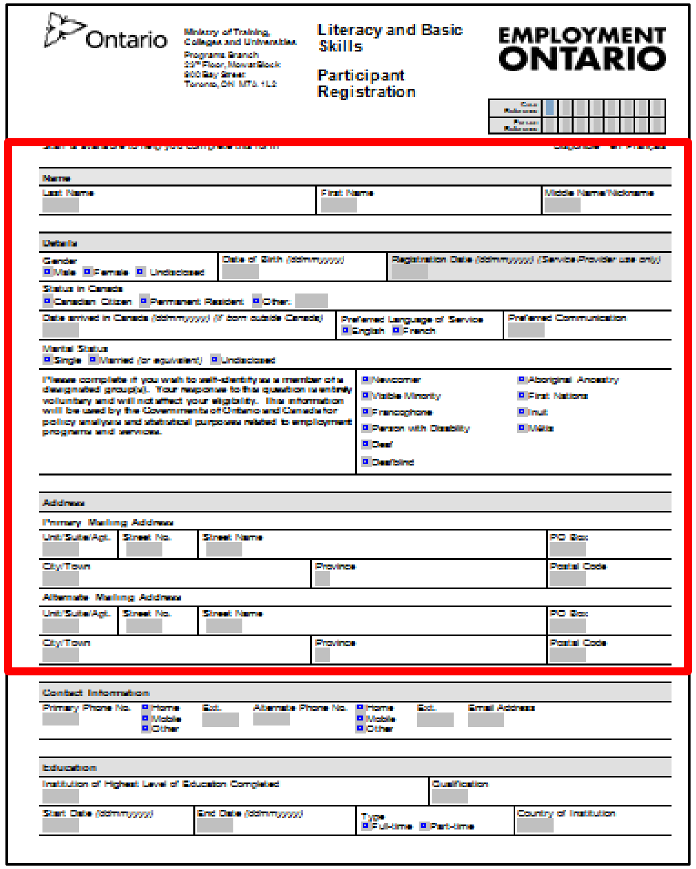
You are required to understand the "Notice of Collection and Consent" and must explain the following to each client:

1. Why their personal information is being collected and how it will be used.
2. From whom the Ministry may collect information and with whom the Ministry may share information.
3. What laws and regulations allow the Ministry to collect the information.
4. Whom to contact with questions and concerns.

Clients should understand that when they sign they are giving MTCU permission to:

- Collect information about them from 3rd parties
- Share information about them with 3rd parties

Step 1: Create an Employment Ontario Case


Ontario
Ministry of Training, Colleges and Universities
Literacy and Basic Skills
Participant Registration
EMPLOYMENT ONTARIO

Name
Last Name | First Name | Middle Name/Nickname

Details
Gender: Male, Female, Undisclosed | Date of Birth (dd/mm/yyyy) | Registration Date (dd/mm/yyyy) (Service Provider use only)
Status in Canada: Canadian Citizen, Permanent Resident, Other
Date arrived in Canada (dd/mm/yyyy) (if born outside Canada) | Preferred Language of Service: English, French | Preferred Communication
Marital Status: Single, Married (or equivalent), Undisclosed
Newcomer, Visible Minority, Francophone, Person with Disability, Deaf, Deafblind, Aboriginal Ancestry, First Nations, Inuit, Métis

Address
Primary Mailing Address
Unit/Suite/Apt. | Street No. | Street Name | PO Box
City/Town | Province | Postal Code
Alternate Mailing Address
Unit/Suite/Apt. | Street No. | Street Name | PO Box
City/Town | Province | Postal Code

Contact Information
Primary Phone No.: Home, Mobile, Other | Ext. | Alternate Phone No.: Home, Mobile, Other | Ext. | Email Address

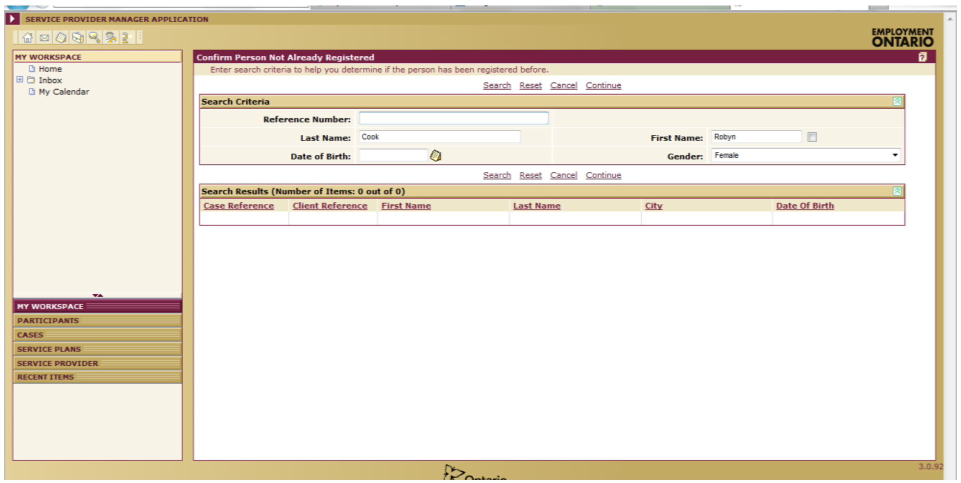
Education
Institution of Highest Level of Education Completed | Qualification
Start Date (dd/mm/yyyy) | End Date (dd/mm/yyyy) | Type: Full-time, Part-time | Country of Institution

To create an Employment Ontario case you only need the information up to and including the primary mailing address.

Many of the fields are non-mandatory.

Generate a master PRF which indicates mandatory and non-mandatory fields.

Step 1: Create an Employment Ontario Case



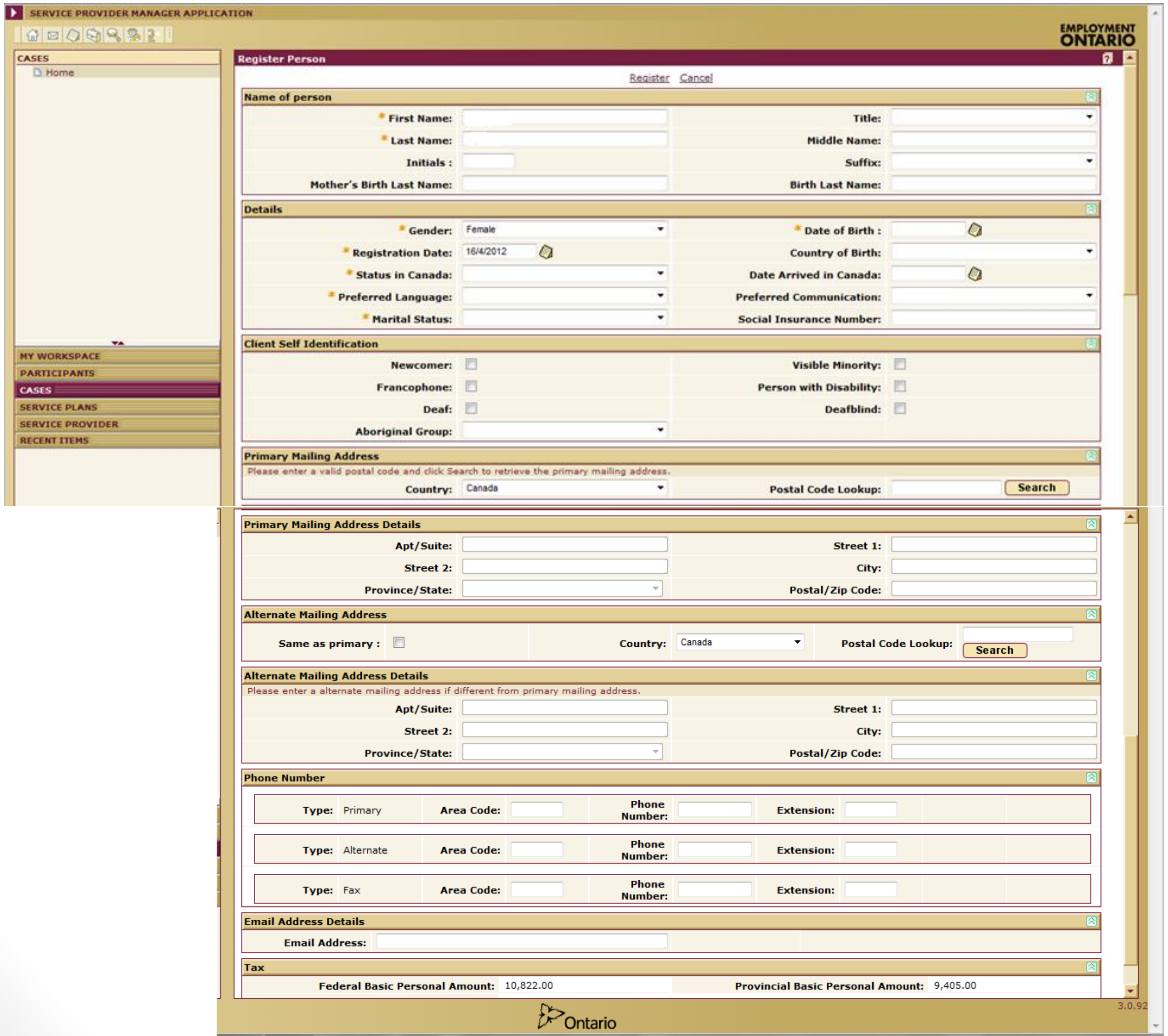
To create the EO case you have to register the client in the system.

Before you create a new case it is important to make sure that the client isn't already in the system by **searching**.

If the search results show that an open EO case exists for that client, you can open the "existing case" .

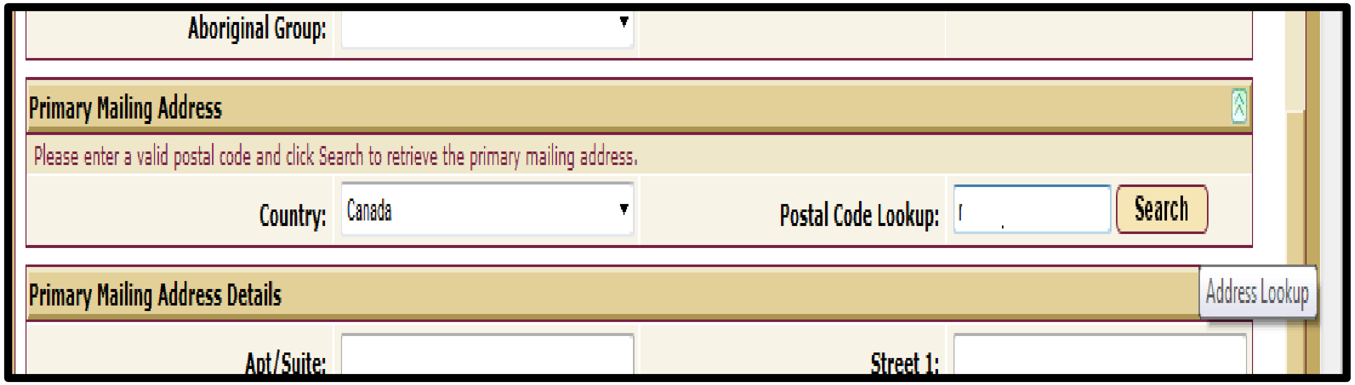
If the search results show that a closed EO case exists for that client, you can select "existing case and reopen" .

Step 1: Create an Employment Ontario Case



When you are completing the registration screen remember that fields that have an asterisk are **MANDATORY**.

Step 1: Create an Employment Ontario Case



- If the address is not found check the Canada Post website: http://www.canadapost.ca/
- The client's primary address must be in Ontario.
- If you have an alternate mailing address you can add it. This is not a mandatory field.

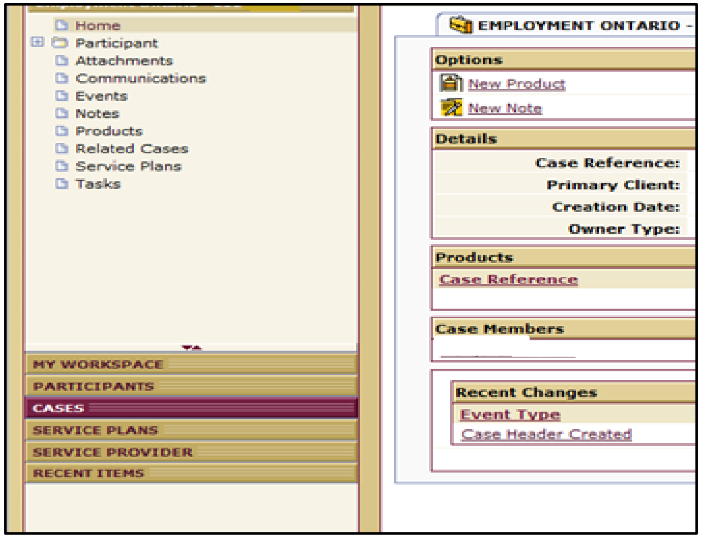
Step 1: Create an Employment Ontario Case

Most
records can be edited.
However once the EO case is
opened you can't delete it.

When you finish entering or editing any information always click **"save".**

When you are editing a record it will often open in a new window. Make sure you close the window after you have saved your changes.

Step 1: Create an Employment Ontario Case



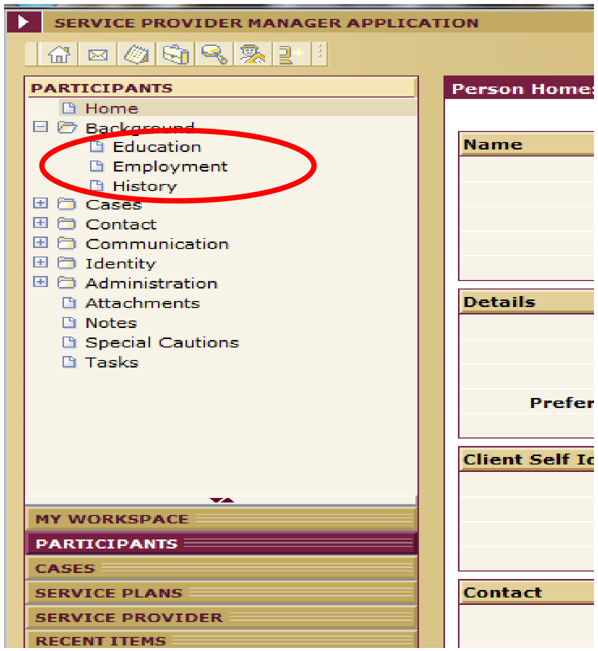
Once a client is registered the **EO Home Page** is created. This is the place where service providers and ministry staff can share client information.

An EO Case Reference Number is generated for the case. This number should be recorded on the PRF.

From this page you can:

- see all the programs and services that a client is participating in or has participated in
- link to the person’s home page and edit profile information
- TCU can create “products” for a client such as a Second Career product delivery case
- Service providers can create **service plans**

Step 2: Building a Client Profile



Once you have generated an EO case you can add additional client profile information such as education and employment records.

When adding **Employment Records** you need to have access to National Occupational Classification (NOC) and the North American Industry Classification System (NAICS). The EOIS-CaMS system times out if you take too long so before you get started you might want to look up the codes you will need ahead of time.

Tip for NOC and NAICS– add shortcuts to your desktop!

Building a Client Profile

For NOC:
http://www5.hrsdc.gc.ca/noc/english/noc/2006/QuickSearch.aspx?val65=*
Use the matrix to determine the “major group” and “skill level”.
Search using “Structure” in the NOC to determine the correct code.

For NAICS: http://www.statcan.gc.ca/subjects-sujets/standard-norme/naics-scian/2007/list-liste-eng.htm
To search NAICS – you need to know what type of industry the employment related to. Searching under “example activities” is helpful. Think about the “industry”.

To Date:		Placement Category:	
y Of Employment:	Canada	Employment Hours per Week:	5
Employment NOC:	Light Duty Cleaners	Wage Amount:	0.00
NAICS Code:	Janitorial Services (except Window Cleaning) CAN	Per:	

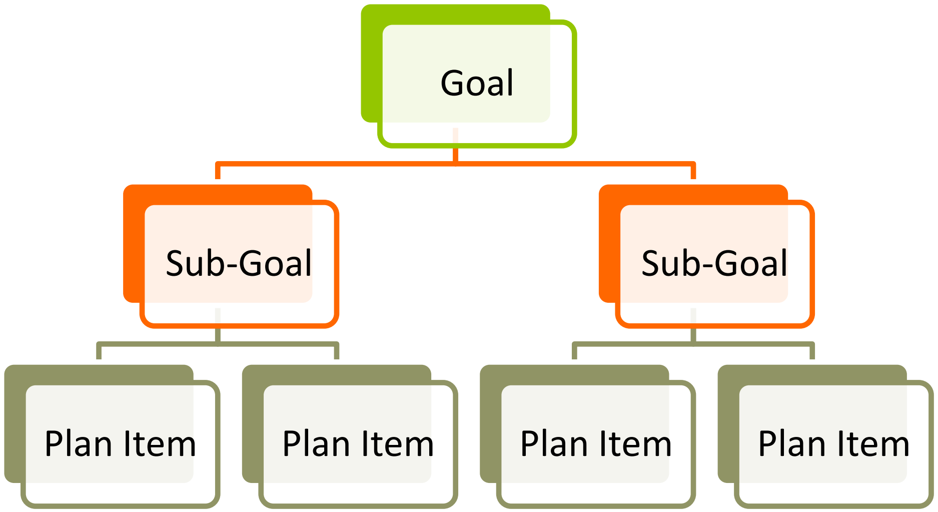
Edit Delete Close

Ensure that the NOC and NAICS descriptions match and make sense!

Create "cheat sheet" of common NOC and NAICS codes

Step 3: Creating an LBS Service Plan

The Service Plan Elements

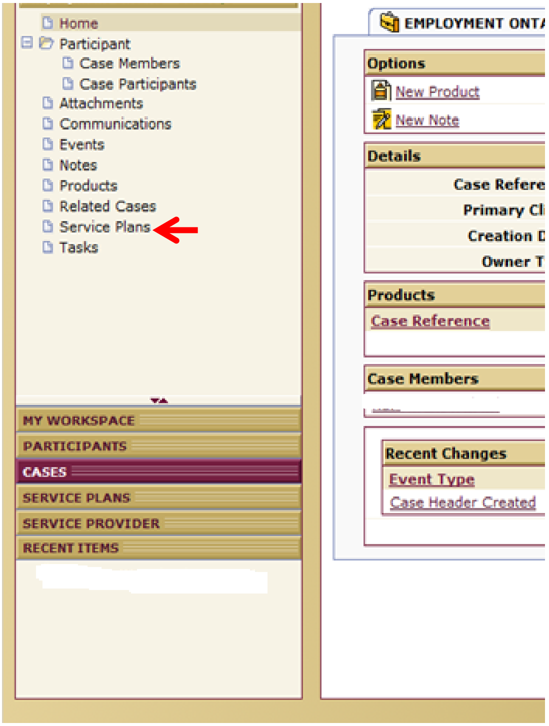


Steps to creating the Service Plan

A. Generate a new service plan for the client from the template.
B. Create the client summary.
C. Add a sub-goal(s).
D. Add a plan item(s) related to that sub-goal.
E. Submit plan for approval.
F. Create plan summary.
G. Record acceptance of plan summary.

Step 3: Creating an LBS Service Plan

A. Generate a new service plan for the client from the template.

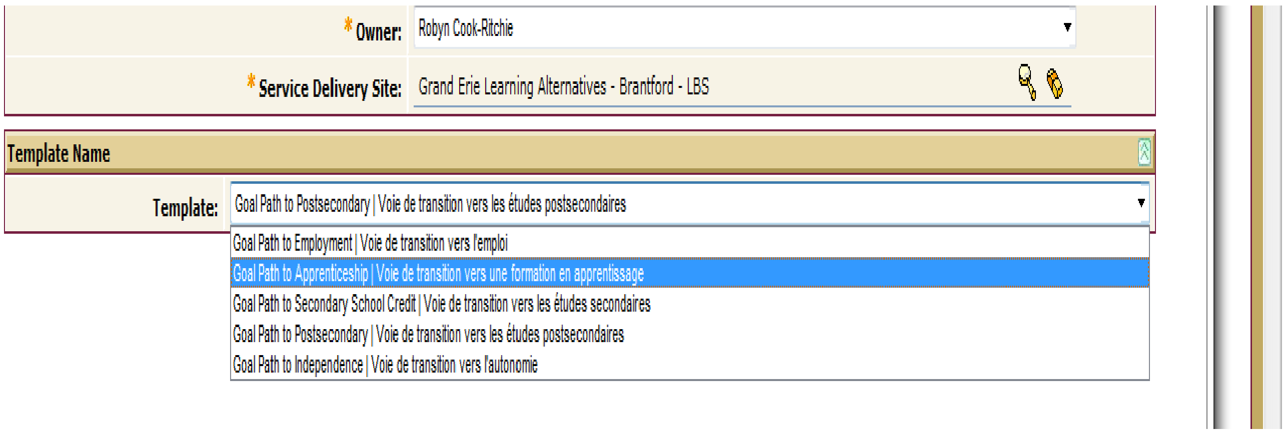


Find the EO case home page for you client.

From here you can find “service plans” under that EO case in the navigation pane.

Step 3: Creating an LBS Service Plan

A. Generate a new service plan for the client from the template.



A **goal** is what the learner wants to achieve once leaving the LBS Program. It is the next step to which the learner transitions after completing the LBS Program.

A **goal path** refers to the preparation required to exit LBS and transition to the goal and is delivered by the LSB service provider.

Step 3: Creating an LBS Service Plan

The LBS Program has five goal paths:

- The **employment goal path** primarily prepares the learner for an activity for which an individual earns a wage or salary. Preparation for activities that model work, such as volunteering at a workplace, internships and community placements, are also included in the employment goal path.

- The **apprenticeship goal path** prepares the learners for on-the-job workplace-based training programs for a career in the skilled trades. Preparation for specific vocational skills is also included in the apprenticeship goal path.

- The **secondary school credit goal path** prepares learners for Ontario Ministry of Education secondary school credit courses leading to an Ontario Secondary School Diploma.

- The **postsecondary goal path** prepares learners for formal education opportunities at a college or university for which high school completion or its equivalency is the normal entrance requirement.

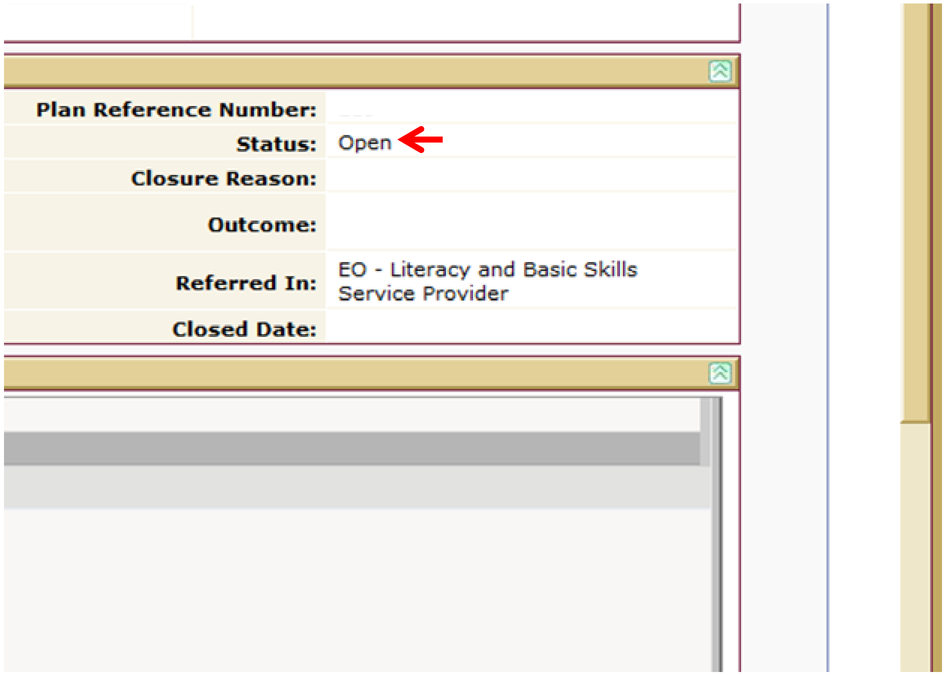
- The **independence goal path** prepares learners for the literacy and basic skills required in four functions that contribute to personal independence (managing basic needs, managing personal health, managing personal issues and relationships, and participating in the community).

Source : Service Provider Guidelines, p.38

For more information refer to the five Goal Path Description Documents found on EOPG: http://www.tcu.gov.on.ca/eng/eopg/oalcf/

Step 3: Creating an LBS Service Plan

A. Generate a new service plan for the client from the template.

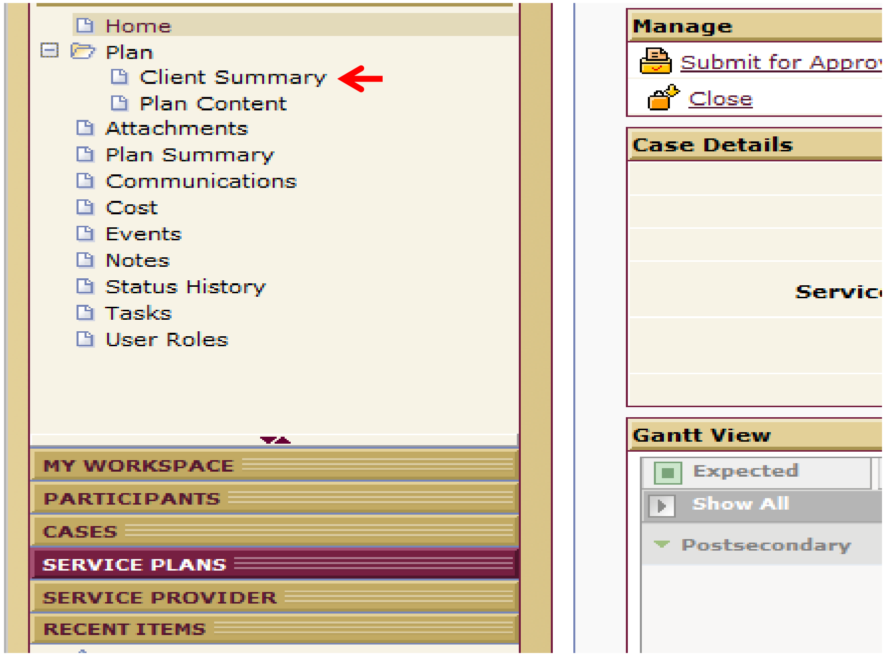


Once you have saved the plan the status is “open”.

A service plan case reference number is also generated.   The case reference number should be recorded on the PRF.

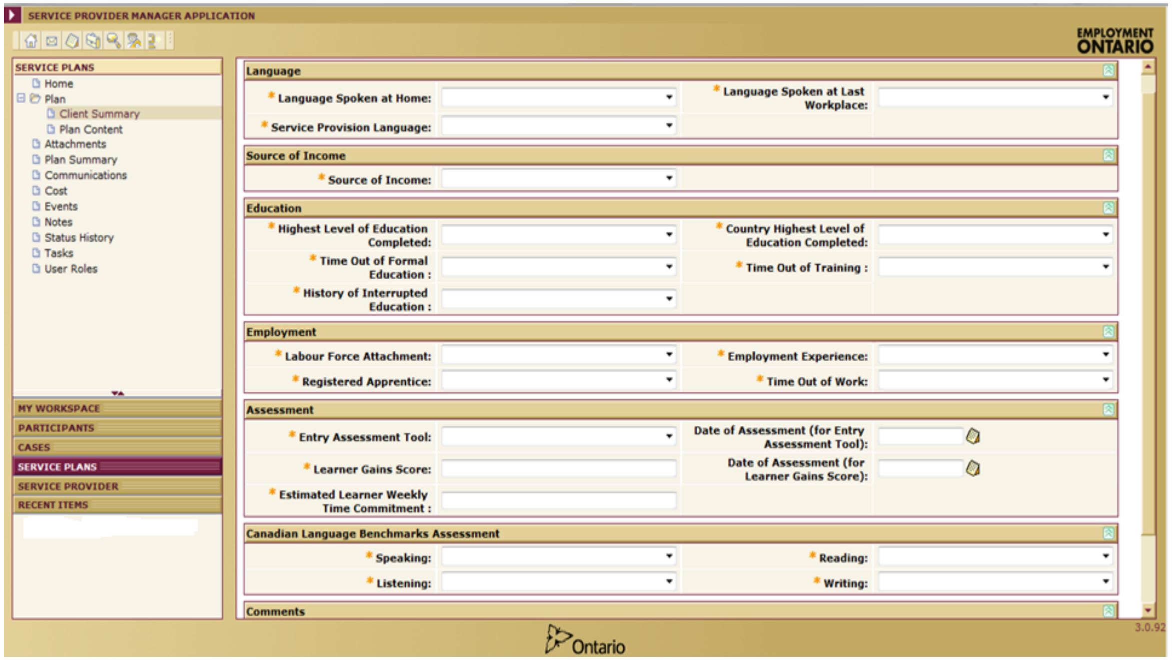
Step 3: Creating an LBS Service Plan

B. Create the client summary.



Step 3: Creating an LBS Service Plan

B. Create the client summary.

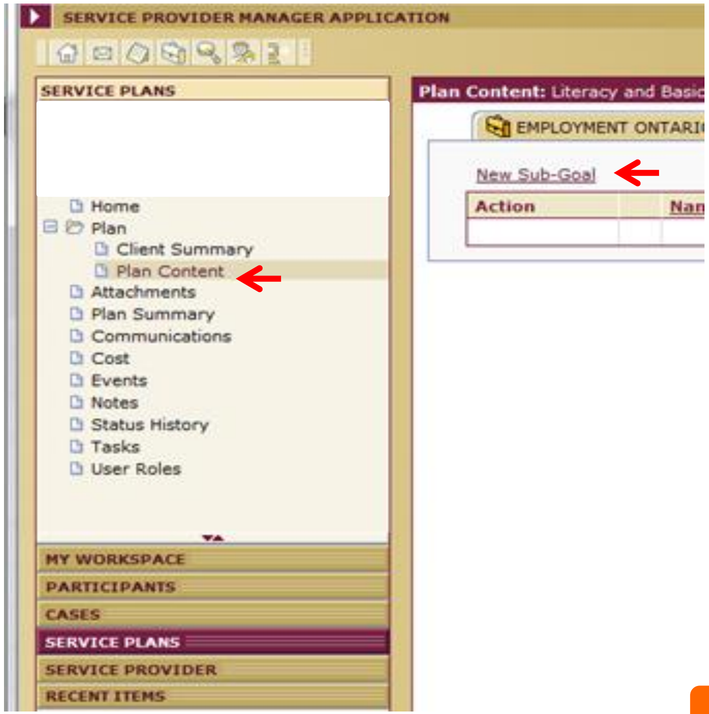


Most mandatory fields are marked with an asterisk.

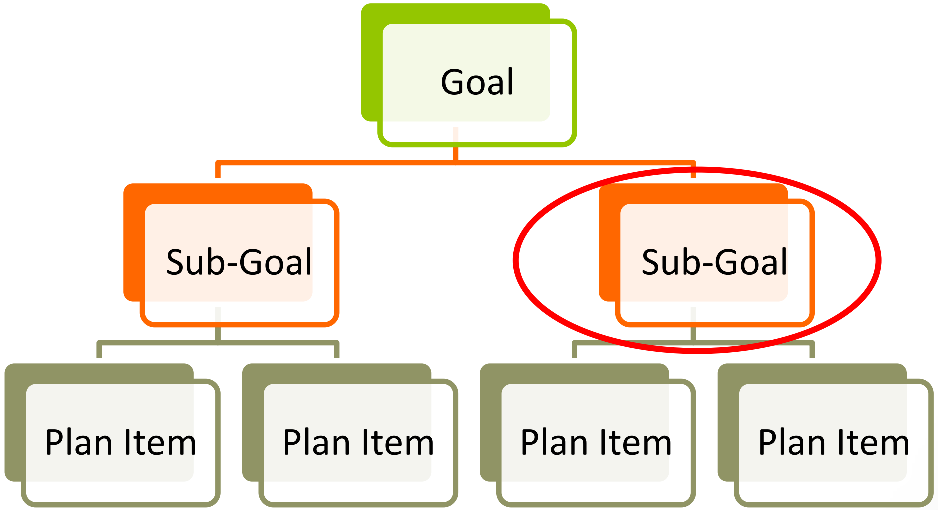
- The estimated learner weekly time commitment is in hours and must be a number between 1 and 100.
- Enter a “0” for learner gains score as it requires you to put a value in. If the learner is new then don`t put in a date. However, if it is a carryover learner see note below.

In order to mark a carryover client in the system, LBS staff users of EOIS-CaMS will be required to **enter January 1st, 2012, as the *Date of the Assessment* for their *Learner Gains score***.

Step 3: Creating an LBS Service Plan

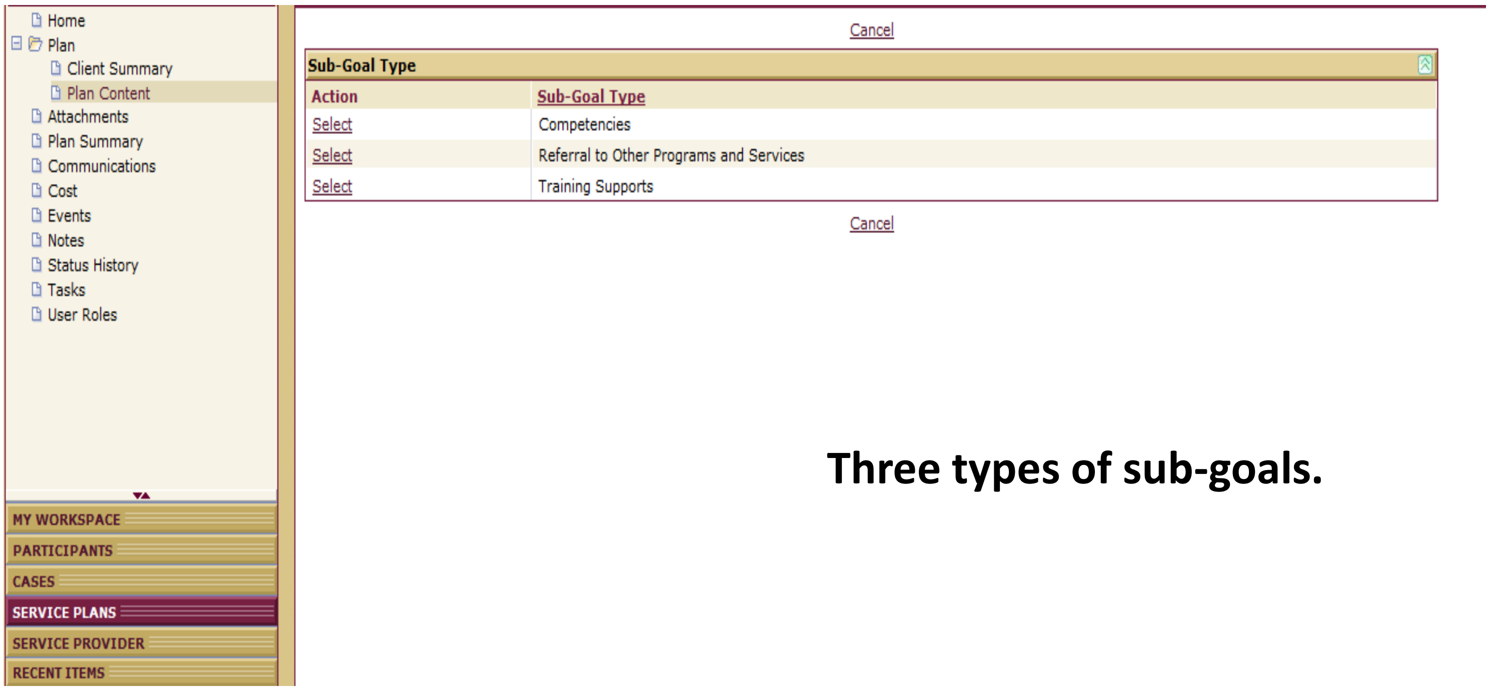


The next step is to add plan content. In order to add plan content you need a sub-goal.



Step 3: Creating an LBS Service Plan

C. Add a sub-goal(s).



Three types of sub-goals.

C. Add a sub-goal(s).

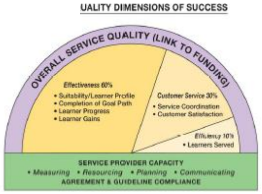
Step 3: Creating an LBS Service Plan

Previous Cancel

Sub-Goal

Action	Name	Description
Select	Find and Use Information	
Select	Communicate Ideas and Information	
Select	Understand and Use Numbers	
Select	Use Digital Technology	
Select	Manage Learning	
Select	Engage with Others	
Select	Learning Activities	

Previous Cancel

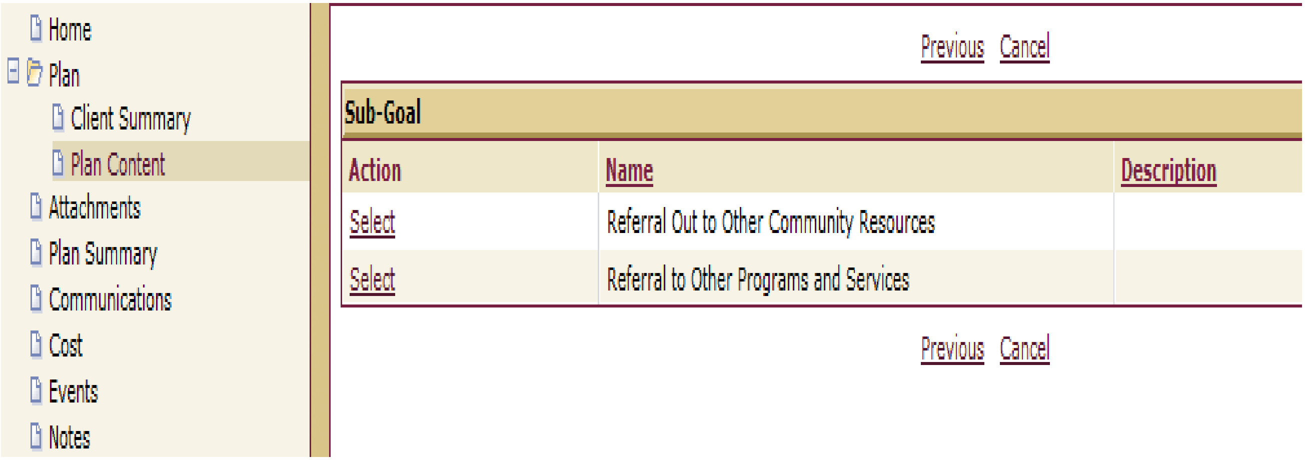


The first category is **competencies.**

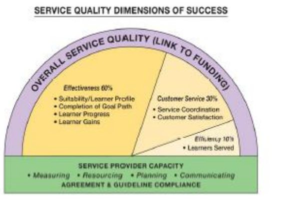
Note that learning activities are also listed here with the six competencies. Completion of **learning activities** are a performance indicator for the **completion of goal path** effective measure.

C. Add a sub-goal(s).

Step 3: Creating an LBS Service Plan



The next category of sub-goal is **Referral to Other Programs and Services.** There are two sub-categories.



Service Coordination is a measure of how the service provider's coordination, integration and supported access to and from other services are effectively incorporated into a client's LBS Learner Plan.

Source: Service Provider Guidelines Effective April 2, 2012

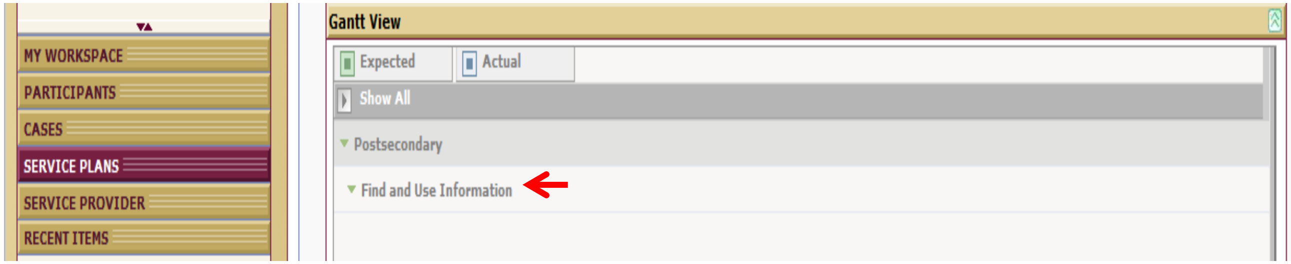
C. Add a sub-goal(s).

Step 3: Creating an LBS Service Plan

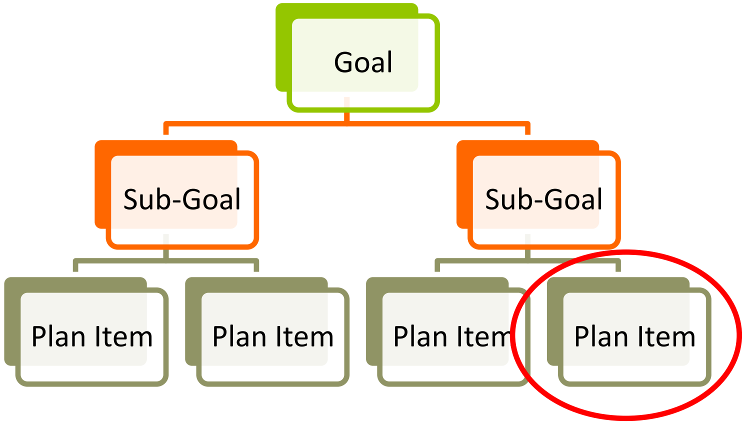
Training Supports is the third category.

Step 3: Creating an LBS Service Plan

D. Add a plan item(s) related to that sub-goal.

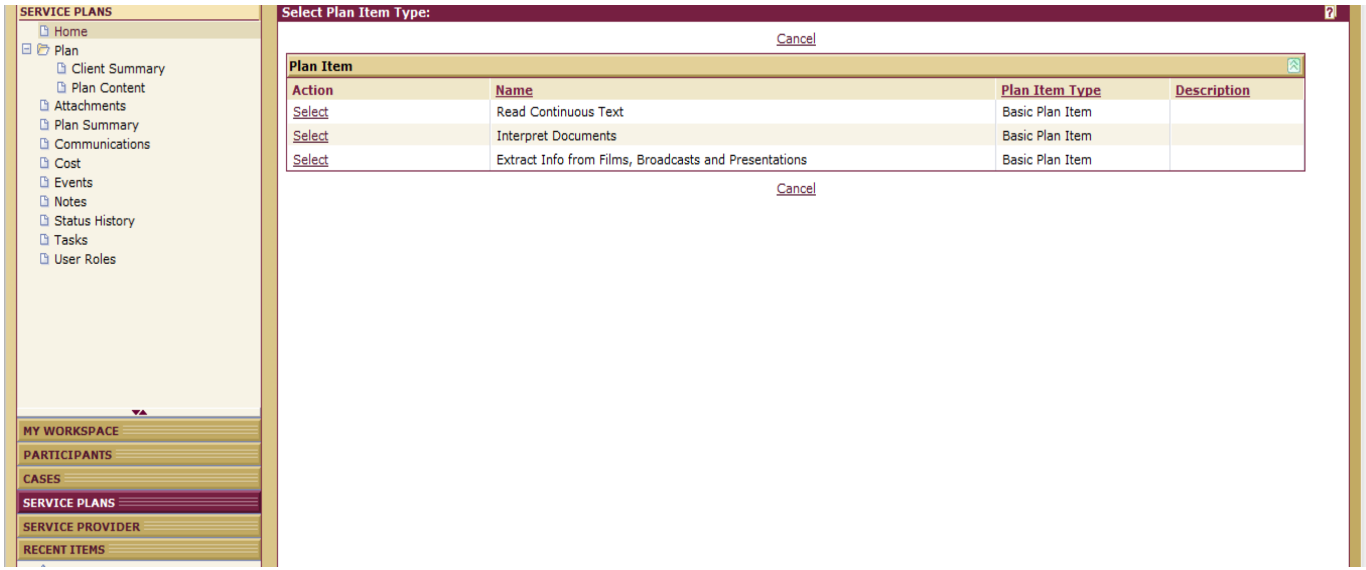


The next step is to add the **plan item** which you do by opening the sub-goal.



Step 3: Creating an LBS Service Plan

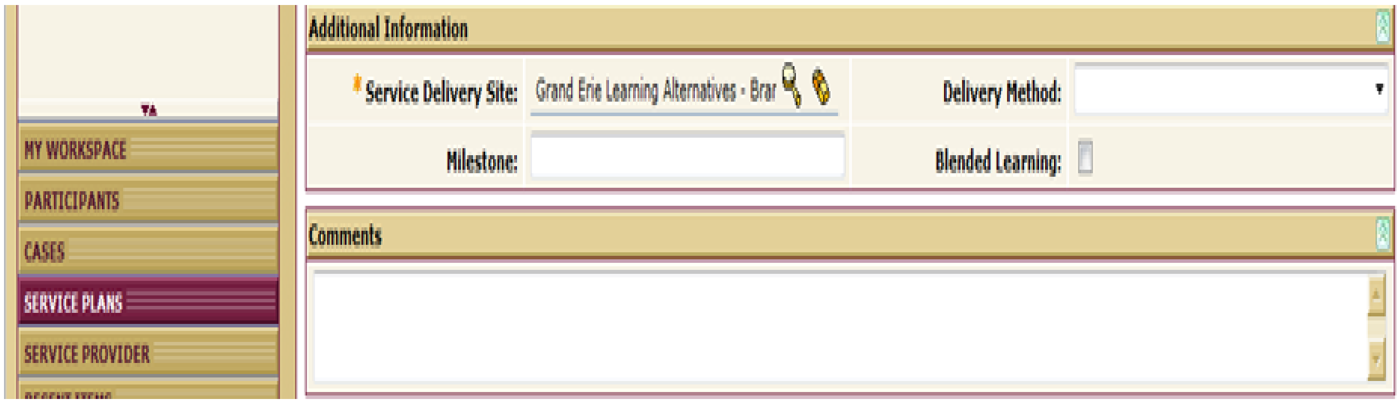
D. Add a plan item(s) related to that sub-goal.



The plan item always relates to the sub-goal.

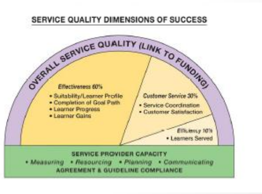
For competencies, the plan item choices are the task groups for the competency.

Step 3: Creating an LBS Service Plan



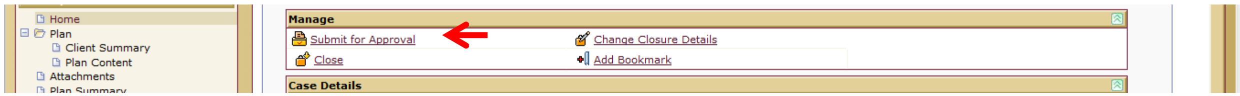
A milestone is selected for each plan item related to competency sub-goals.

Milestones are performance indicators for both **Learner Progress** and **Completion of Goal Path**

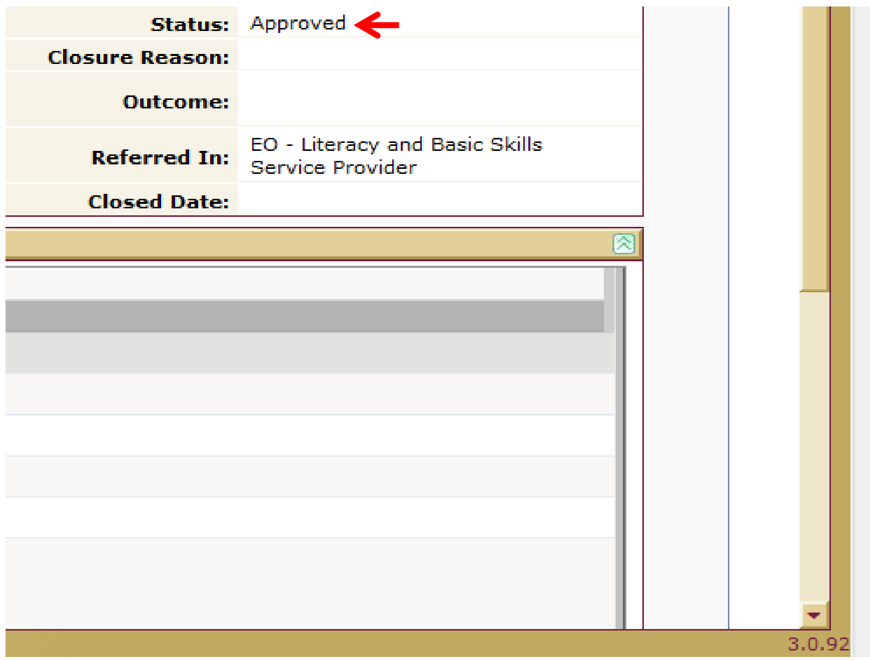


Step 3: Creating an LBS Service Plan

E. Submit plan for approval.



Submit the plan for approval



Step 3: Creating an LBS Service Plan

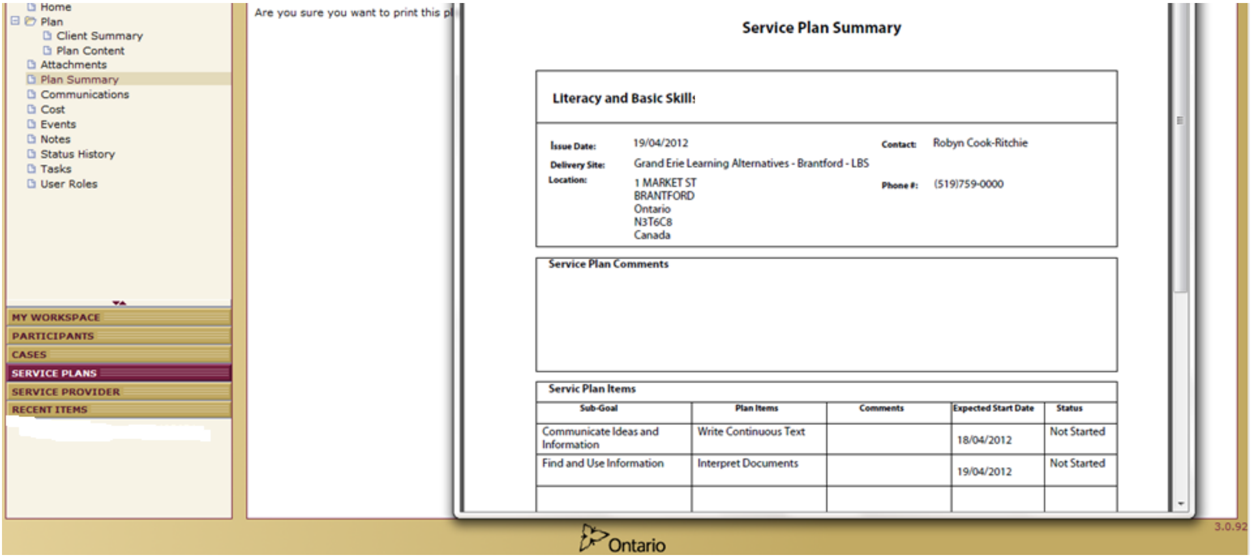
F. Create plan summary.

The next step is to create a **plan summary**.

In order for the service plan to be activated the ***Plan Summary*** must be accepted by the learner. This means printing off a copy of the ***Plan Summary***, reviewing it with the learner, having the Learner sign the plan and then recording the acceptance of the plan in EOIS-CaMs.

Step 3: Creating an LBS Service Plan

F. Create plan summary.

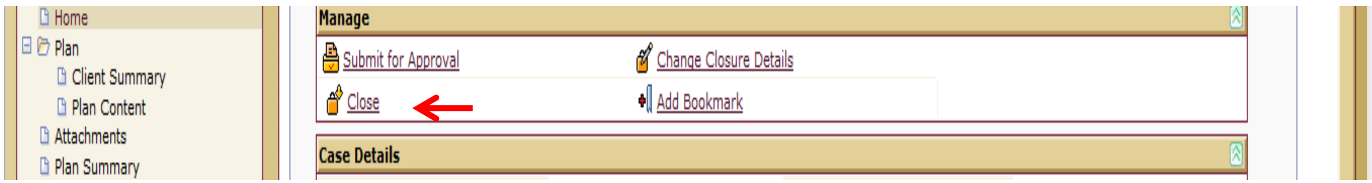


A PDF of the Plan Summary will be generated. You can print this to review with the learner. They need to approve the plan with you. Have them sign a copy and keep it in the file. After the learner has agreed to the plan, you need to record the summary plan acceptance. To do this you need to edit the plan and manually change the date of acceptance of the plan.

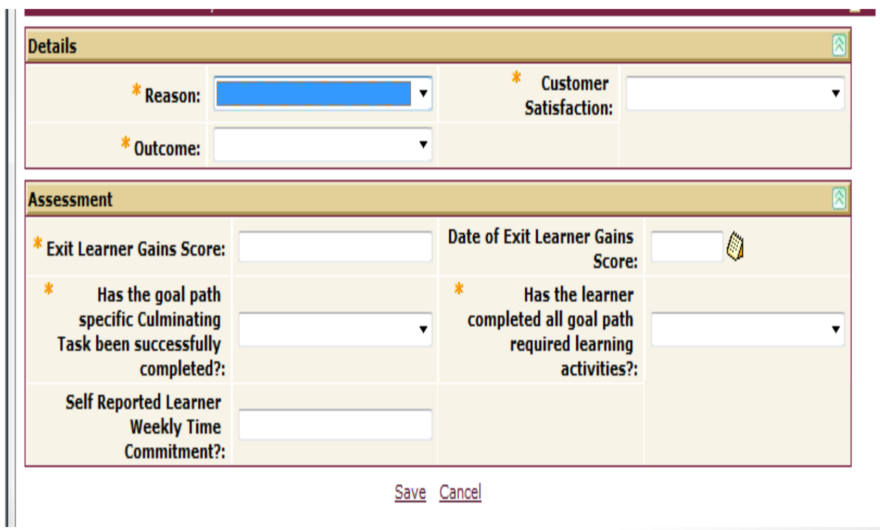
Note: In the future there are plans to have this generate an actual learner plan.

Closing Service Plans

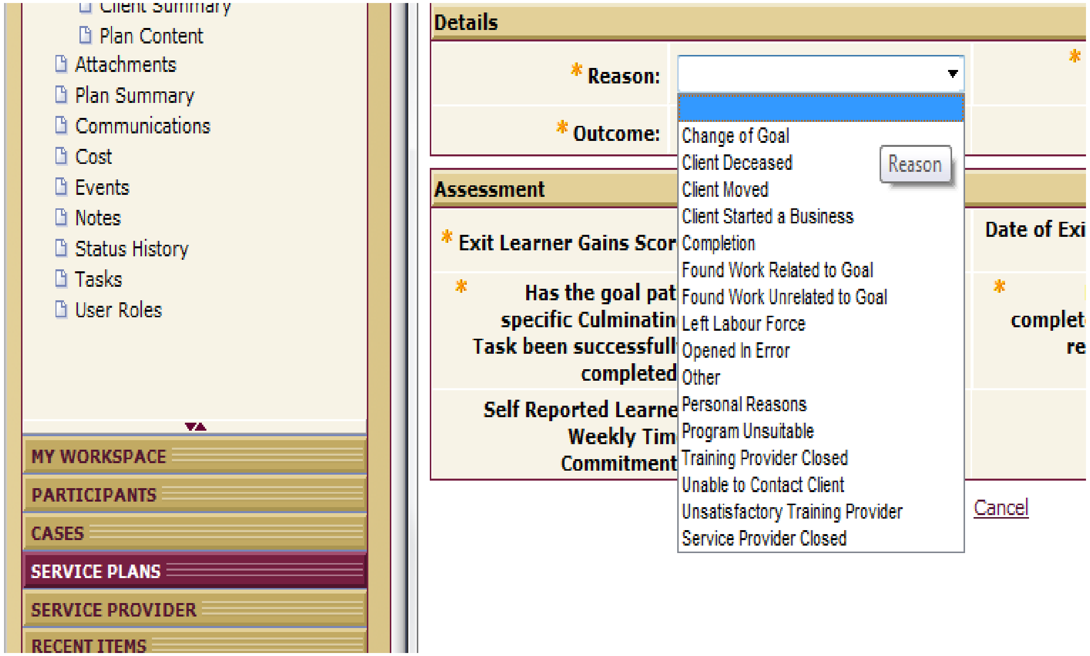
The *LBS Exit and Follow-up** form is completed when a learner is ready to exit to the program. The form capture the information needed to close the learner's **Service Plan**. When you are ready to close a **Service Plan** it is imperative that you close all aspects from the lowest element up: plan items, then sub-goals, then goals, then the service plan itself.



When a **Service Plan** is closed, the reason for closure, client outcome and customer satisfaction score are entered into EOIS-CaMS. Whether or not a learner has completed a goal specific *Culminating Task* is also reported on.

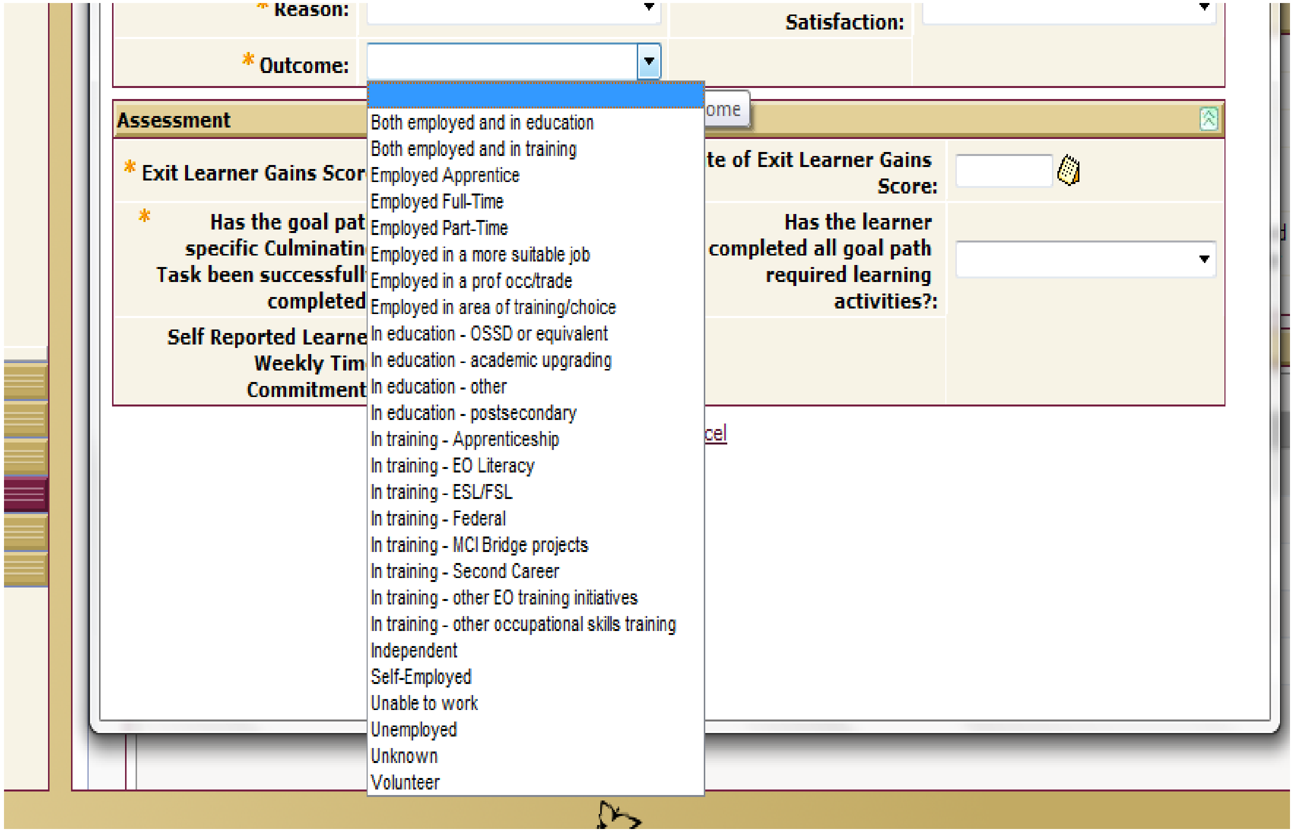


Closing Service Plans



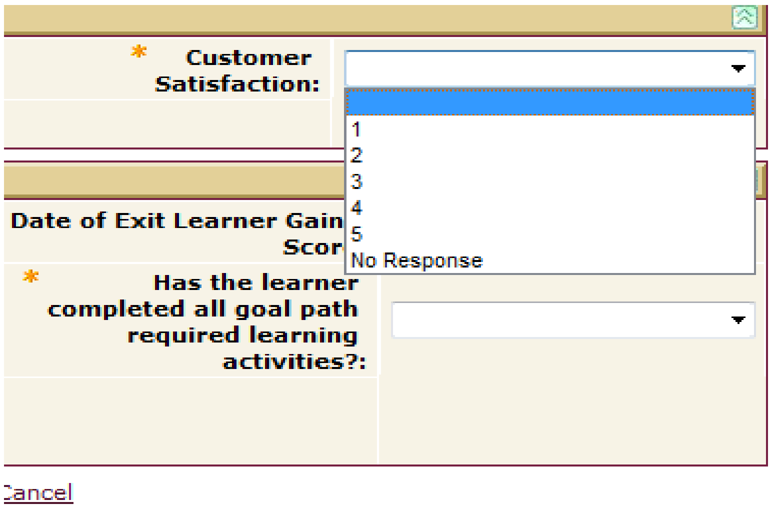
Reason for leaving

Closing Service Plans



Outcome

Closing Service Plans



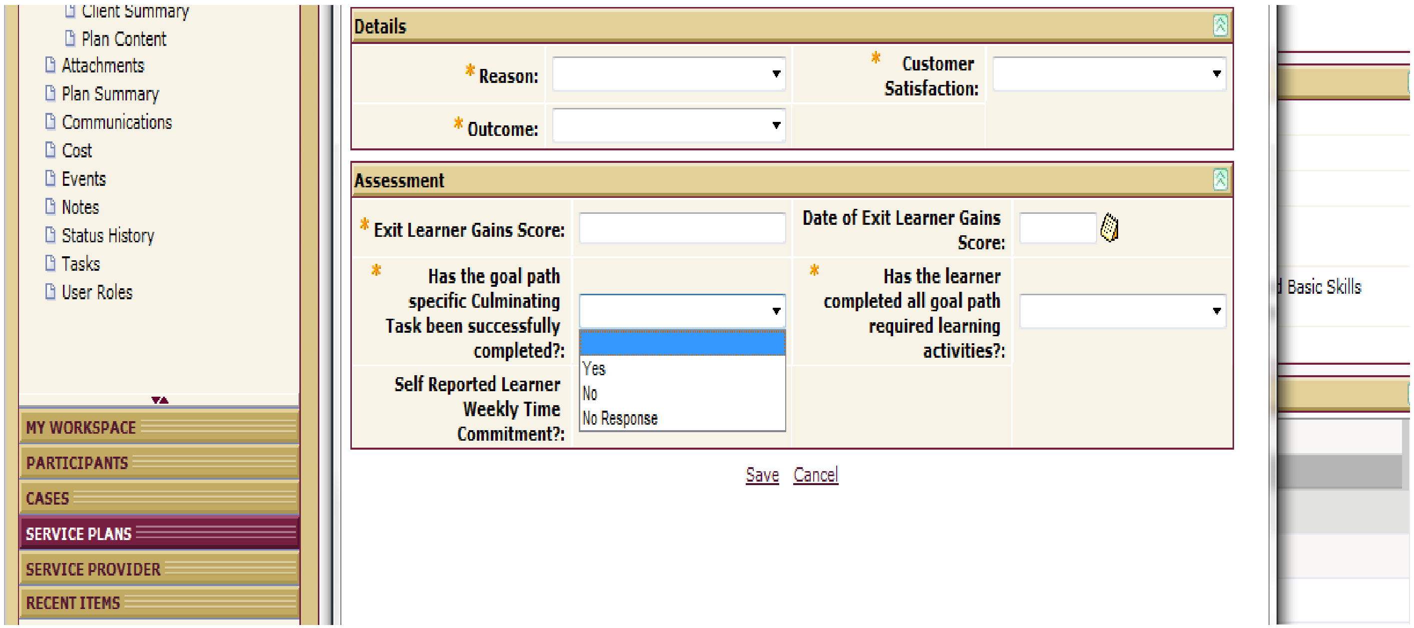
Customer satisfaction

Customer Satisfaction (10%) is a measure of feedback from learners who exit the program about their satisfaction with the service they have received.

Learners are asked by the service provider to indicate, on a scale of 1 to 5, how likely they are to recommend the LBS Program to someone looking for similar services.

Source: Service Provider Guidelines Effective April 2, 2012

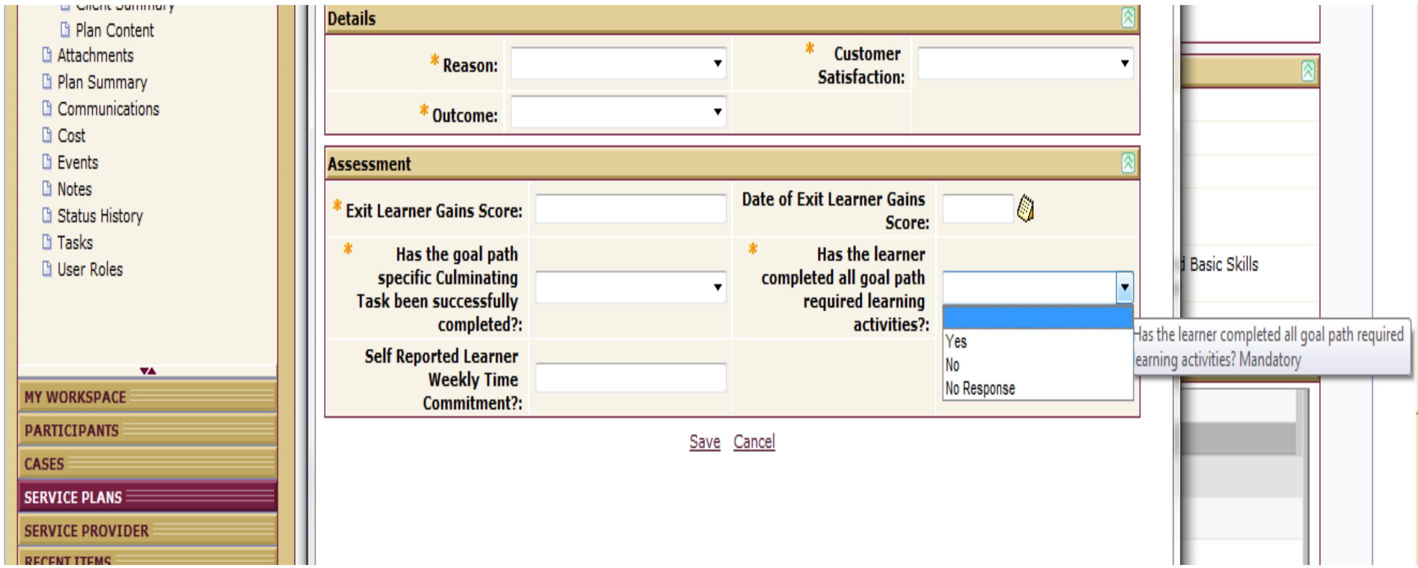
Closing Service Plans



Culminating Task

Completion of culminating task is a performance indicator for the **completion of goal path effectiveness measure** in the performance management framework.

Closing Service Plans

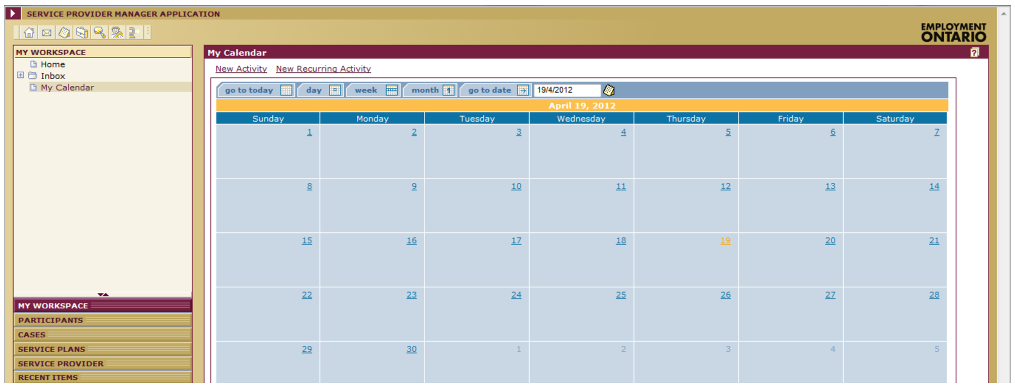


Learning activities

Completion of learning activities is a performance indicator for the completion of goal path effectiveness measure in the performance management framework.

Case Reviews

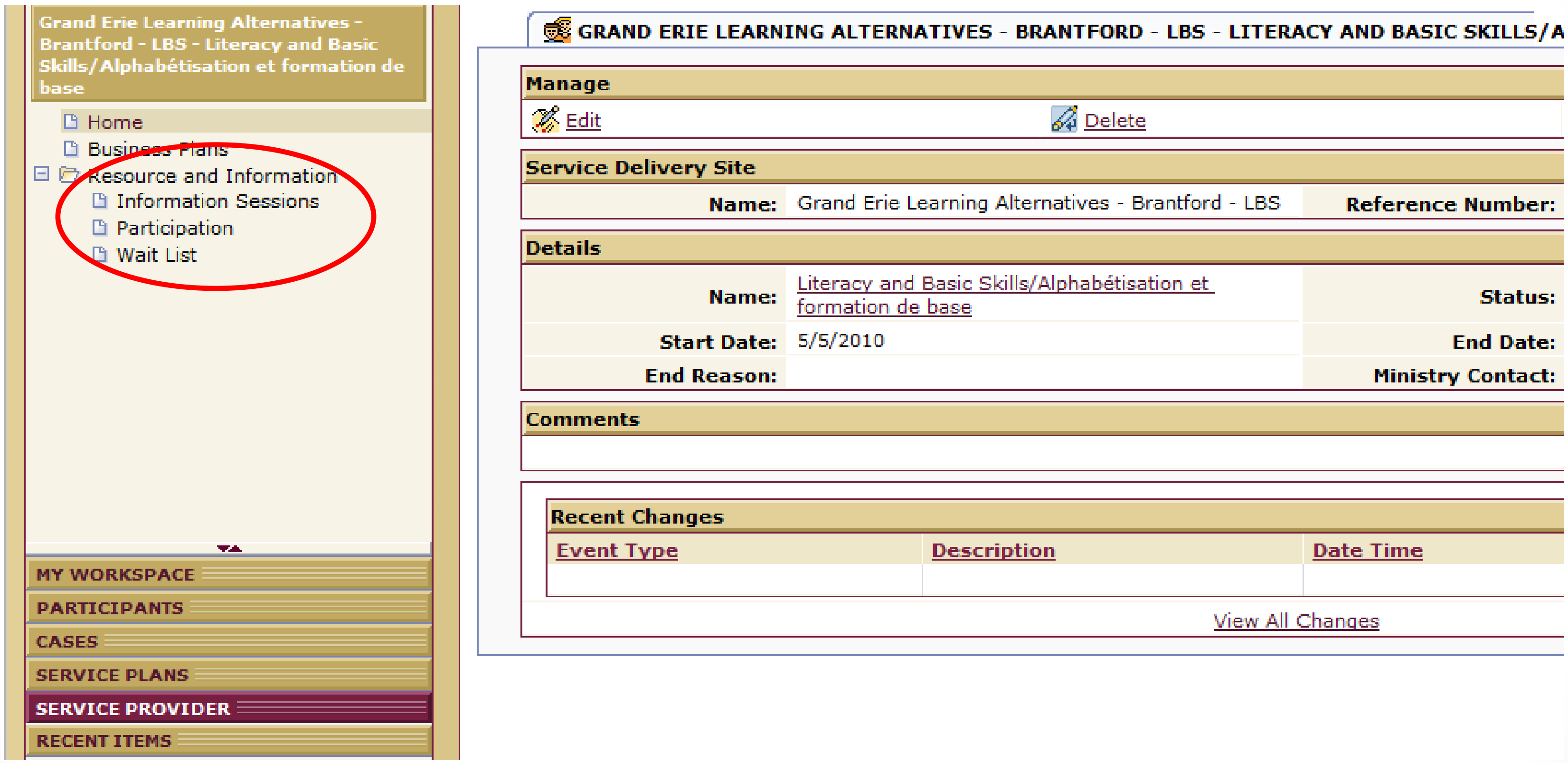
Case reviews (formerly called follow-ups) 3 months, six months and twelve months are scheduled when a **Service Plan** is closed. **Case reviews** are added to an **Event Calendar** in EOIS-CaMS.



Tip: Selecting "View Event List" will allow you to see upcoming **Case reviews** that have been scheduled.

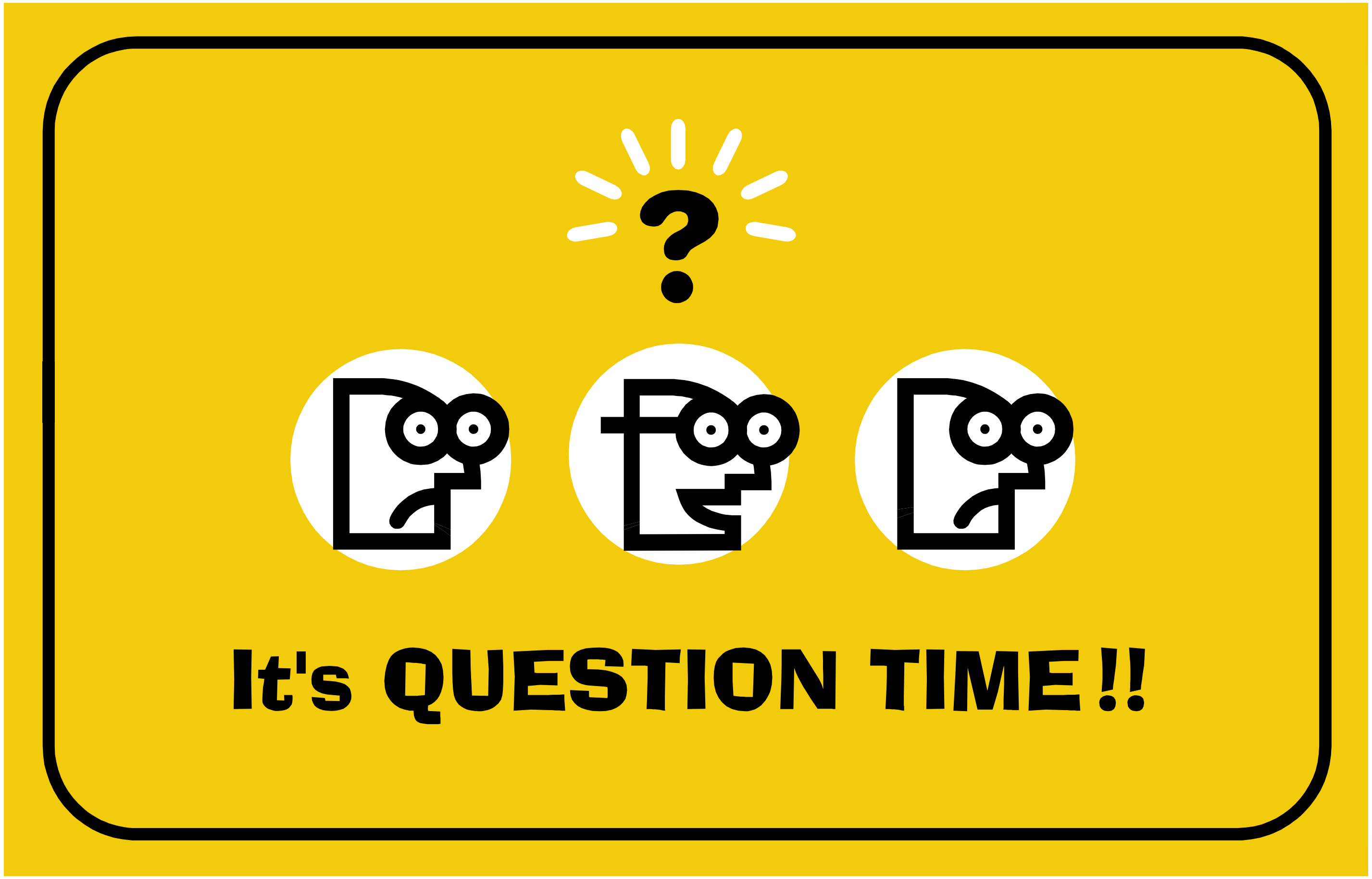
All learners that are exited from LBS prior to March 31, 2012 must continue to be followed up in the old Information Management System (IMS).

Monthly Reporting in EOIS-CaMS



Monthly Reporting in EOIS-CaMS

Information Sessions	**Two types:** **1. Outreach** **2. Information Session** - Provide a description - Choose audience - # of attendees
Participation	**Referrals** -# of individual referred to other services
Wait List	**Wait List** -# of individuals on the wait list


It's QUESTION TIME!!