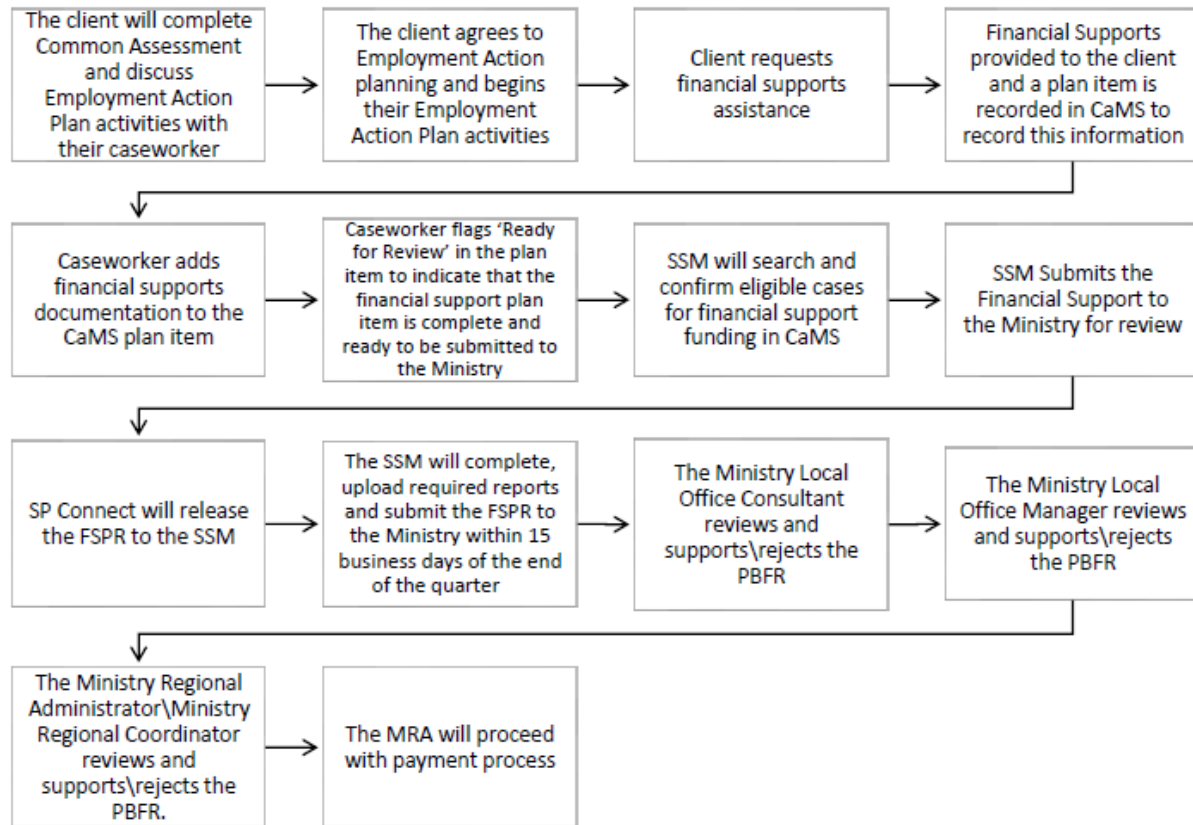


Employment Ontario Information System (EOIS)



**Case Worker
Financial Supports Desk Aid**

Financial Supports Payment Workflow:



Purpose of the document

The purpose of this document is to demonstrate new functionality in EOIS CaMS that is specific to the Integrated Employment Services (IES) Program, focusing on the Financial Supports (FS) approval flow that a Caseworker will be completing. This includes:

- Initial FS Submission to their SSM for approval, by identifying the Financial Support as 'Ready for Review'
- Resubmission to their SSM when a Financial Support has its Initial Monitor completed and has been identified as 'Resubmission Required' by the Ministry

Policy Basis of Ministry File Reviews

- **Financial Supports:**

For financial supports, “*proof of payment*” should be attached.

In some cases, for example bulk purchases, an individual payment receipt would not be available. This should be noted in the comments that the expense was part of a bulk purchase, no attachment required.

In other cases, documentation related to the financial support element may be lengthy, for example an agreement with an employer.

1. *Attachment should show the associated expense – this could be a single page from the agreement, an invoice from the employer or a payment report from the Service provider*
2. *If a full documentation is not uploaded, it should be retained (if it isn't very long, the entire file can be uploaded)*

Transaction date (i.e. payment date, not the date the agreement was signed) is what determines reimbursement.

Caseworker Financial Supports Plan Items Flow:

A client starts pre-employment activities and requires Jobseeker Financial Supports for Certification Charges.

- The client provides a **receipt** to her **Caseworker** for **proof of payment**.
- The receipt has a "**transaction date**"
- The client gave the **receipt** to the caseworker.
- The caseworker entered this information into CaMS



The transaction date should be entered in the receipt date field

- The Caseworker uploads the receipt in CaMS and completes the plan item.

✓ **Click Add Attachment to upload documentation for proof of payment or employment:**

The screenshot displays the 'Plan Content' section of the application. A table lists three plan items, each with a 'Completed' status and 'Attained' result. The 'Add Attachment...' button is highlighted with a red box. The 'Plan Content' tab is also highlighted with a red circle.

Program	Employment Action Plan	Status	Active
Start Date	11/02/2021	Closed Date	
Owner	John Smith	Service Delivery Site	SSM - Hamilton-Niagara Peninsula

Plan Item	Start Date	Closed Date	Status	Result
Job Seeker - Certification Charges	19/02/2021	19/02/2021	Completed	Attained
Job Seeker - Emergency/Infrequent Child Care	11/11/2020	11/02/2021	Completed	Attained
Job Seeker - Language Skills Assessment	18/02/2021	18/02/2021	Completed	Attained

✓ Enter the correct Receipt date:

The screenshot shows the 'Add Attachment' form in a 'Service Delivery Site'. The form is titled 'Add Attachment' and has a '* required field' indicator. It contains the following fields:

- File Details (dropdown menu)
- Document Type * (dropdown menu)
- New File * (text input with a 'Browse...' button)
- Receipt Date * (text input with a calendar icon, highlighted with a red box)
- Attachment Description (dropdown menu)
- Description * (text input)

At the bottom right, there are 'Save' and 'Cancel' buttons.

- The system accepts the following file types: JPEG, PDF, PNG, and Word.
- Once the receipt is attached, this meets the ministry's record-keeping requirements.

i To be eligible for Financial Supports, documentation must be uploaded in CaMS for proof of payment or employment and Financial Supports plan item is completed with ***“Ready for Review”*** selected:

The screenshot shows the 'Modify Plan Item' form in a 'CASE MANAGEMENT SYSTEM - SERVICE PROVIDER MANAGER APPLICATION'. The form is titled 'Modify Plan Item' and has a '* required field' indicator. It contains the following fields:

- Actual Start Date (text input with value '25/02/2021' and a calendar icon)
- Actual Cost (text input with value '100')
- HST Amount (text input with value '13')
- Paid Date (text input with a calendar icon)
- Outcome (dropdown menu with value 'Attained')
- Actual End Date (text input with value '25/02/2021' and a calendar icon)
- Ready for Review (checkbox, checked, highlighted with a red box)
- Rationale (text input with value 'Require supports to attend job')
- Comments (text input)

At the bottom right, there are 'Save' and 'Cancel' buttons.



Ready for Review will be marked Yes after Save is clicked

Claire Lune - 7009538

Program	Employment Action Plan	Status	Active
Start Date	11/02/2021	Closed Date	
Owner	John Smith	Service Delivery Site	SSM - Hamilton-Niagara Peninsula

Home Common Assessment **Plan Content** Plan Summary Case Notes Outcomes

Plan Content New Sub-Goal

Actual Start Date	25/02/2021	Actual Cost	100.00
Sub-Goal	Jobseeker Financial Supports	HST Amount	13.00
Outcome	Attained	Plan Item Reference Number	13058257
Status	Completed		
Ready for Review	Yes	Paid Date	

Rationale

Require supports to attend job

Attachments

Caseworker Financial Supports Plan Items Resubmission flow:

- *The client's Financial Supports requires a resubmission because no proof of payment was uploaded.*
- *The client provides a receipt to her Caseworker.*

✓ **Caseworker uploads the receipt in CaMS and selects 'Resubmit for Review' to signal that the Financial Support has been remedied:**

Claire Lune - 7009538

Program	Employment Action Plan	Status	Active
Start Date	11/02/2021	Closed Date	
Owner	John Smith	Service Delivery Site	SSM - Hamilton-Niagara Peninsula

Home Common Assessment **Plan Content** Plan Summary Case Notes Outcomes

Plan Content New Sub-Goal

Job Seeker Financial Supports

Modify Plan Item

Caseworker	John Smith	Change Caseworker	
Actual Start Date	25/02/2021	Outcome	Attained
Actual Cost	100.00	Actual End Date	25/02/2021
HST Amount	13.00		
Paid Date			
Ready for Review	Yes	Resubmit for Review	<input checked="" type="checkbox"/>

Rationale

Require supports to attend job

Save Cancel