

# **Employment Ontario Information System (EOIS) Case Management System Service Provider User Guide**



## **Chapter 7: Employer Management**

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## Document History

Version #	Date	Description
1.0	July 2010	Initial version released prior to the launch of the system on August 4, 2010.
1.01	May 2011	Minor updates
2.0	January 2012	Review and edit for Release 3.0
2.1	April 2013	Minor updates
2.2	July 2014	Updates to reflect new Release 4.0 user interface
2.3	November 2014	Updates to reflect major changes to employer management as a result of new Canada-Ontario Job Grant Functionality in EOIS-CaMS Release 4.2.
3.0	May 2015	Updates to reflect the transition to a corporate-branch structure for COJG employers.  Updates to reflect changes to closing (liquidating) an employer and change whereby Business Information Number no longer mandatory or required for COJG Employment Ontario Case creation.
3.1	December 2015	Updated to include changes related to EOIS-CaMS Release 5.2  Update to format and readability
3.2	May 2016	Updates to reflect Release 6.0
3.3	November 2016	Updates to reflect Release 6.3
3.4	June 2017	Updates to reflect Release 17.2
3.5	September 2017	Updates to reflect Release 17.3: <ul style="list-style-type: none"> <li>Increased search functionality</li> </ul>
3.6	December 2017	Updates to reflect Release 17.4
3.7	November 2018	Update screenshots re Curam v7 Upgrade

### 7.1 Employer Management

This chapter covers the following aspects of managing Employer information in the EOIS Case Management System:

- Registering a Corporate Entity and an Employer
- Creating Employment Ontario Case
- Modifying a Corporate Entity and an Employer
- Viewing Service Plans tied to Employer

The corporate entity and employer participant types are used to capture employer profile information for various Employment Ontario programs. The corporate entity captures corporate-level information tied to a CRA business number and the employer profile captures local branch-level information. Multiple employers (branches) can be associated to one corporate entity and every employer must be associated to a corporate entity, even if it is an employer with a single location. Employers participating in placements or service plans must be registered in the system and associated at the employer (branch) level.

## 7.2 Roles and Responsibilities

The creation and management of employers is the responsibility of service providers. The following table lists the actions that each system user role can perform.

Note: Corporate entities can only be closed through the EOIS Service Desk.

<b>Roles</b>	<b>View Corporate Entity/ Employer Profile</b>	<b>Create/Modify Corporate Entity/ Employer</b>	<b>Create EO Case</b>	<b>Close Corporate Entity</b>	<b>Close Employer</b>
Service Provider Manager	Yes	Yes	Yes	No	Yes
Service Provider Manager Non-Case	No	No	No	No	No
Service Provider Caseworker	Yes	Yes	Yes	No	Yes
Service Provider Administrator	Yes	Yes	Yes	No	Yes
Ministry Manager	Yes	No	No	No	No
Ministry Regional Administrator	Yes	No	No	No	No
Ministry Caseworker	Yes	No	No	No	No

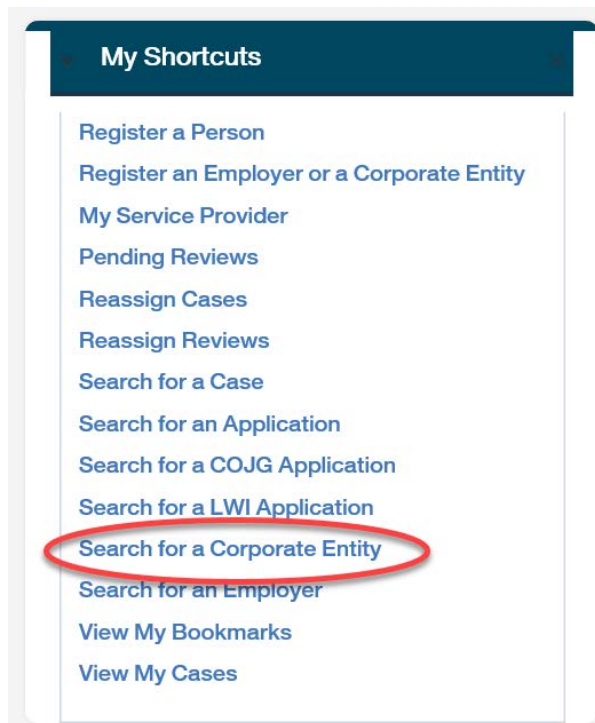
## 7.3 View Corporate Entity

The EOIS Case Management System (the system) enables users to view the information of corporate entities that have been registered.

### System Steps

#### ➔ Step 1: Workspace Page

Click SEARCH FOR A CORPORATE ENTITY.



#### ➔ Step 2: Corporate Entity Search Page

Complete all necessary fields, and click SEARCH. Click the REFERENCE NUMBER next to the employer to view its home page.

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

Corporate Entity Reference Number	CRA Number	Trading / Business Name	Registered / Legal Name	Business City	Last Updated	Trading Status
10240844805	123456789	ABC Inc.	ABC Inc.	BURLINGTON	10/10/2018 10:57	

#### ➔ Step 3: Corporate Entity Home Page

Basic corporate entity information will appear on the home page.

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Corporate Entity Home: Edit Refresh Print

Name

Registered / Legal Name	ABC Inc	Trading / Business Name	ABC Inc
CRA Number	608870586	Total Number of Employees in Corporation	22
Year Business Registered	2012	Preferred Language	English
Preferred Communication		Sensitivity	1
Registration Date	19/10/2015	Status	Active

Contact

Address	12 CONWAY AVE YORK Ontario M6E1H2 Canada	Telephone Number	(416)651-7529
---------	--	------------------	---------------

Current Activities

Open Tasks	0	Open Cases	0
------------	---	------------	---

Comments

To view employers associated to this corporate entity, select the **Associated Branches** tab.

Corporate Entity Home: Edit Refresh Print

Home Contact Administration Alternative IDs History Trading Status **Associated Branches**

Name

Registered / Legal Name	ABC Inc	Trading / Business Name	ABC Inc
CRA Number	608870586	Total Number of Employees in Corporation	22
Year Business Registered	2012	Preferred Language	English
Preferred Communication		Sensitivity	1
Registration Date	19/10/2015	Status	Active

Contact

Address	12 CONWAY AVE YORK Ontario M6E1H2 Canada	Telephone Number	(416)651-7529
---------	--	------------------	---------------

Current Activities

Open Tasks	0	Open Cases	0
------------	---	------------	---

Comments

## ➔ Step 4: Associated Branches

A list of employers associated to the corporate entity is displayed. Select the EMPLOYER REFERENCE NUMBER to view an associated employer profile.



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[Home](#) [Contact](#) [Administration](#) [Alternative IDs](#) [History](#) [Trading Status](#) [Associated Branches](#)

List of Associated Branches



List of Associated Branches



Case Reference	Employer Reference Number	Trading / Business Name	Registered / Legal Name	Business City	Last Updated	Trading Status
4305871	10240000992	ABC Inc	ABC Inc.	YORK	15/10/2018 11:12	

## 7.4 View Employer

The EOIS Case Management System (the system) enables users to view the information of employers that have been registered.

### System Steps

#### ➡ Step 1: Workspace Page

Click SEARCH FOR AN EMPLOYER.

- My Shortcuts
  - Register a Person
  - Register an Employer or a Corporate Entity
  - 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 LWI Application
  - Search for a Corporate Entity
  - Search for an Employer
  - View My Bookmarks
  - View My Cases

#### ➡ Step 2: Employer Search Page

Complete all necessary fields, and click SEARCH. Click the REFERENCE NUMBER next to the employer to view its home page.

Search Criteria

Employer Reference Number  Business City

Trading / Business Name  Registered / Legal Name

Include Employers with Liquidated Trading Status  Include Employers with 'Opened in error' Trading Status

Search Results (Number of Items: 2 out of 2)

Case Reference	Employer Reference Number	Trading / Business Name	Registered / Legal Name	Business City	Last Updated	Trading Status
4305871	10240000992	ABC Inc	ABC Inc.	YORK	15/10/2018 11:12	

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## ➡ Step 3: Employer Home Page

Basic employer information will appear on the employer's home page. The associated **Corporate Entity** is shown on this page. To view the associated corporate entity profile, click the name of the CORPORATE ENTITY.

Home Cases Service Plan Cases Contact Administration Alternative IDs History Trading Status Employer Review

Employer Home: Edit Refresh Print

Name

Trading / Business Name	ABC Inc	Registered / Legal Name	ABC Inc.
Business Identification Number	607350454	Preferred Language	English
Registration Date	02/06/2011	Preferred Communication	Phone
Sensitivity	1	Corporate Entity	<a href="#">ABC Inc [Change Corporate Entity]</a>
		Corporate CRA Number	608870586
		Total Number of Employees in Corporation	22
		Status	Active

Further Details

Total Number of Employees in Branch	22	Employer Business Size	11 - 50
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### 7.5 Registering a Non-COJG Employer

Registering an employer is a two-step process: both a corporate entity and an employer profile must exist and be associated before the employer can be linked to a service plan. The corporate entity captures all of the information relevant to the overall corporation, such as its CRA number and corporate address. Information relating to branch location(s) is collected under the employer profile. There can be many employers (branches) associated to one corporate entity.



Historical employer information in EOIS-CaMS has been captured at the employer (branch) level; therefore, many existing employers may not be associated to corporate entities. As outlined in the steps that follow, there will be four scenarios that can be encountered when registering an employer:

- Neither the corporate entity nor the employer (branch) exists and both must be registered.
- The branch (employer) exists but its corporate entity must be created and the branch must be associated to it.
- The corporate entity exists but a new employer (branch) needs to be created and associated to it.
- Both the corporate entity and employer (branch) already exist.

Prerequisites:

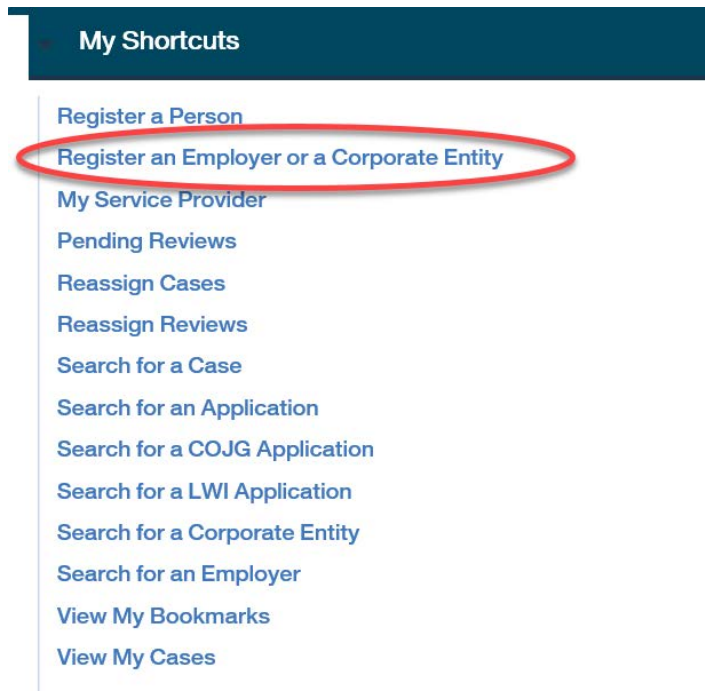
All requirements outlined in relevant program or service guidelines must be met. Be sure that all employer information is captured prior to registration.

## 7.5.1 Create New Corporate Entity and New Employer

### System Steps

#### ➤ Step 1: Workspace Page

Click CREATE A NEW EMPLOYER or CORPORATE ENTITY from the **My Shortcuts** list.



#### ➤ Step 2: Confirm Employer Not Already Registered Page

This step is to confirm whether the employer already exists in the system. The CRA Number also searches the Business Identification Number field within employer records as this field has historically captured the CRA Number.



In order to retrieve the most accurate search results, it is recommended that users first search using **only the CRA Number** since this field should produce the most accurate results. If this search does not retrieve a relevant employer (branch) or corporate entity, next use the **Business Name only**. Note the system performs partial searches and more search results should appear if a shortened version of the name is used. For example, when trying to find “Bob Jones Automotive,” search using “Bob Jones” or “Jones Automotive.” These results can be further refined using the **Legal Name** and **Postal Code** fields.

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Complete all necessary fields, and click SEARCH. **Registered/Legal Name** is the legal name and the **Trading/Business Name** is the operating name.

In the **Search Results** table, the **Corporate/Branch** field indicates if the employer is associated to a corporate entity (“Corporate”) or not (“Unassociated Branch”). Records appearing with “Corporate” should be toggled to view the associated branches or to add a new branch to the corporate entity.

In this scenario, the employer was not found. Click REGISTER CORPORATE ENTITY.

Confirm Employer Not Already Registered X

Confirm Employer Not Already Registered

\* required field

Search Criteria

Trading / Business Name Paperclip Company Registered / Legal Name

CRA Number Postal Code

Search Reset Register Corporate Entity

Search Results

Corporate / Branch	Reference Number	CRA Number	Trading / Business Name	Registered / Legal Name	Business City	Registration Date	Last Updated
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## ➤ Step 3: Register Corporate Entity Page

The system will display the Register Corporate Entity page pre-populating data fields that were entered by the user as search criteria. The user has the ability to modify these pre-populated fields. Enter as much information as possible into the available fields. Fields marked with an asterisk are mandatory.

Complete all necessary fields.

Register Corporate Entity

Register Cancel

\* required field

Registered Office

Registered / Legal Name \* Trading / Business Name \* Paperclip Company

CRA Number \* Total Number of Employees in Corporation \* 0

Year Business Registered Preferred Language \*

Preferred Communication

Registered / Corporate Address

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An Address Details page will load for the postal code where users will enter the street number, unit or suite number and any other relevant information.

## Address Details



Canada Post provides the populated address information. Please complete additional address fields where necessary.

\* required field

### Mailing Address

Street Number	<input type="text" value="175"/>	Suffix	<input type="text"/>	Unit/Suite/Apt	<input type="text" value="901"/>
Street Name	BLOOR	Street Type	Street	Street Direction	E
Delivery Mode		PO Box or Route Number			
Delivery Installation Type				Delivery Installation Qualifier	
City/Town	TORONTO	Province	ON	Postal Code	M4W3R8
Country	CANADA				

Previous

Continue

Cancel

Click the CONTINUE button to return to the Register Corporate Entity page. The address fields on the page will populate with the information.



If the address cannot be found in the Address Details page, verify the address on [Canada Post's website](#).

Ensure the **Same as Registered/Corporate Address** checkbox is selected if this is the case. The **Contact Type** for the initial registration must have a value of "Primary."

Click REGISTER to complete.

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Same as Registered / Corporate Address  Country: Canada Postal Code to Lookup: Search

Mailing Address

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

Phone Details

Primary Phone Number: Primary TTY: Alternate Phone Number: Alternate TTY: Fax Number: Fax TTY:

Email Address

Email Address:

Company Contact

Contact Name \* Contact Type \*

## ➡ Step 4: Corporate Entity Registration Completed Page

Now that the corporate entity has been created, the next step in this scenario is to create the employer (branch) under this corporate entity. Click **CREATE NEW EMPLOYER FOR THIS CORPORATE ENTITY**.

Confirm Employer Not Already Registered

Confirm Employer Not Already Registered

### Corporate Entity Registration Completed

The Corporate Entity registration process has been successfully completed.

The Corporate Entity's reference number is 10240844807

[Create New Employer for this Corporate Entity](#)

[Click here to open the Corporate Entity home page.](#)

[Click here to register another Corporate Entity.](#)

## ➡ Step 5: Confirm Employer Not Already Registered Page

Upon confirming employer is not already registered, click **CONTINUE**.



# EOIS-CaMS: Service Provider User Guide

Search Criteria

Employer Reference Number	<input type="text"/>	Business City	<input type="text"/>
Trading / Business Name	Pen Paperclip Co	Registered / Legal Name	<input type="text"/>

Search Results (Number of Items: 0)

Case Reference	Employer Reference Number	Trading / Business Name	Registered / Legal Name	Business City	Last Updated	Trading Status
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## ➡ Step 6: Register Employer Page

The system will display the Register Employer page pre-populating data fields that were entered by the user as search criteria. The user has the ability to modify these pre-populated fields. Enter as much information as possible into the available fields. Fields marked with an asterisk are mandatory.

Complete all required fields.

Register Employer

\* required field

Registered Office

Trading / Business Name *	Pen Paperclip Co	Registered / Legal Name *	<input type="text"/>
Business Identification Number	<input type="text"/>	Preferred Language *	<input type="text"/>
Registration Date *	11/10/2018	Preferred Communication	<input type="text"/>

Further Details

Total Number of Employees in Branch *	0	Business Description	<input type="text"/>
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Business Address

Canada	Postal Code to Lookup	<input type="text"/>
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An Address Details page will load for the postal code where users will enter the street number, unit or suite number and any other relevant information.

Click the CONTINUE button to return to the Register Employer page. The address fields on the page will populate with the information.

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## Address Details ⓧ

Canada Post provides the populated address information. Please complete additional address fields where necessary.

\* required field

### Mailing Address

Street Number	<input type="text" value="300"/>	Suffix	<input type="text"/>	Unit/Suite/Apt	<input type="text" value="200"/>
Street Name	BAY	Street Type	Street	Street Direction	
Delivery Mode		PO Box or Route Number			
Delivery Installation Type		Delivery Installation Qualifier			
City/Town	TORONTO	Province	ON	Postal Code	M7A1L2
Country	CANADA				

Continue

Cancel



If the address cannot be found in the Address Details page, verify the address on [Canada Post's website](#).

Ensure the **Same as Business Address** checkbox is selected if this is the case.

Same as Business Address



The six-digit **NAICS Code** is the North American Industry Classification System code. The system will not search for the **NAICS Code**; it must be retrieved manually from the Internet. The system validates the code and will produce an error if it is not a valid code. The **Contact Type** for the initial registration must have a value of "Primary."

### Company Contact

Contact Name \*  Contact Type \*

### Contact Phone Number

Primary	Phone Number	<input type="text"/>	TTY	<input type="checkbox"/>
Alternate	Phone Number	<input type="text"/>	TTY	<input type="checkbox"/>

Contact Email Address

### Trading Details

Type of Sector \*  NAICS Code \*

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Click REGISTER to complete.

Register Employer [Register](#) [Cancel](#) [Refresh](#) [Print](#) \* required field

Registered Office

Trading / Business Name *	Pen Paperclip Co.	Registered / Legal Name *	Pen Paperclip Co.
Business Identification Number		Preferred Language *	English
Registration Date *	11/10/2018	Preferred Communication	

## ➡ Step 7: Employer Registration Completed Page

A page confirms successful registration. A system generated **Reference Number** will appear. This page provides a link to the employer's home page as well as a link to register additional employers. Select **CLICK HERE TO OPEN THE EMPLOYER HOME PAGE**.

### Employer Registration Completed

The employer registration process has been successfully completed.

The employer's reference number is 10240809988

[Click here to open the employer home page.](#)

[Click here to register another employer.](#)

## ➡ Step 8: Employer Home Page

Note that the employer is now linked to the **Corporate Entity**.

[Home](#) [Cases](#) [Service Plan Cases](#) [Contact](#) [Administration](#) [Alternative IDs](#) [History](#) [Trading Status](#) [Employer Review](#)

Employer Home: [Edit](#) [Create Employment Ontario Case](#) [Refresh](#) [Print](#)

Name			
Trading / Business Name	Pen Paperclip Co.	Registered / Legal Name	Pen Paperclip Co.
Business Identification Number		Preferred Language	English
Registration Date	15/10/2018	Preferred Communication	
Sensitivity	1	Corporate Entity	<a href="#">Paperclip Company [Change Corporate Entity]</a>
		Corporate CRA Number	113456789
		Total Number of Employees in Corporation	88
		Status	Active

Further Details

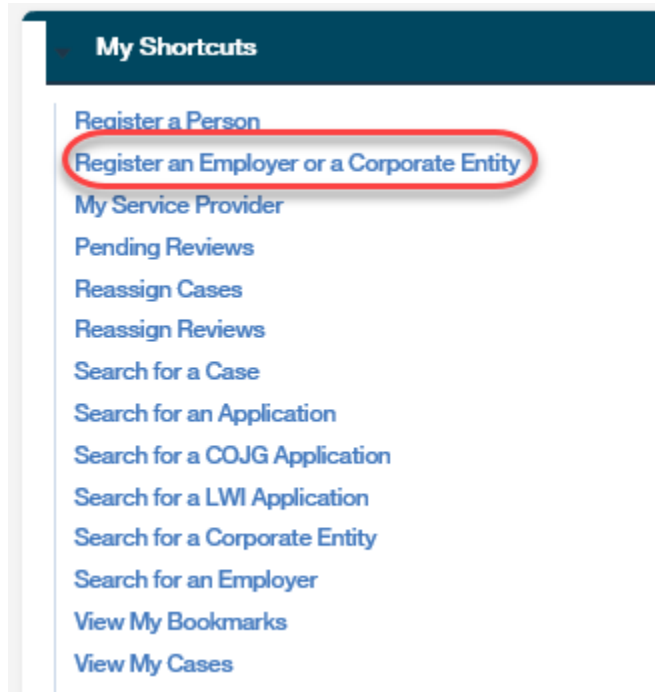
Total Number of Employees in Branch	23	Employer Business Size	11 - 50
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## 7.5.2 Create New Corporate Entity and Select Existing Employer

### System Steps

#### ➤ Step 1: Workspace Page

Click CREATE A NEW EMPLOYER or CORPORATE ENTITY from the **My Shortcuts** list.



#### ➤ Step 2: Confirm Employer Not Already Registered Page

This step is to confirm whether the employer already exists in the system. The **CRA Number** also searches the **Business Identification Number** field within employer records as this field has historically captured the CRA Number. Complete all necessary fields, and click SEARCH.

In the **Search Results** table, the **Corporate/Branch** field indicates if the employer is associated to a corporate entity (“Corporate”) or not (“Unassociated Branch”). Records appearing with “Corporate” should be toggled to view the associated branches or to add a new branch to the corporate entity.

In this scenario, the employer was found as an Unassociated Branch. Since the employer exists but the corporate entity needs to be created, click REGISTER CORPORATE ENTITY.

# EOIS-CaMS: Service Provider User Guide

Confirm Employer Not Already Registered

\* required field

Search Criteria

Trading / Business Name  Registered / Legal Name

CRA Number  Postal Code

Search Results

Corporate / Branch	Reference Number	CRA Number	Trading / Business Name	Registered / Legal Name	Business City	Registration Date	Last Updated
Unassociated Branch	10240809989		D's Candy Co	D's Candy Co	TORONTO	15/10/2018	15/10/2018 11:40

## ➤ Step 3: Register Corporate Entity Page

Complete all necessary fields. An Address Details page will load for the postal code where users will enter the street number, unit or suite number and any other relevant information. Remember that this information relates to the employer's corporate head office. Click REGISTER.

Register Corporate Entity

\* required field

Registered Office

Registered / Legal Name \*  Trading / Business Name \*

CRA Number \*  Total Number of Employees in Corporation \*

Year Business Registered  Preferred Language \*

Preferred Communication

## ➤ Step 4: Corporate Entity Registration Completed Page

Now that the corporate entity has been created, the next step in this scenario is to associate the employer (branch) under this corporate entity.

## Corporate Entity Registration Completed

The Corporate Entity registration process has been successfully completed.

The Corporate Entity's reference number is 10240809990

[Create New Employer for this Corporate Entity](#)

[Click here to open the Corporate Entity home page.](#)

[Click here to register another Corporate Entity.](#)

### ➡ Step 5: Employer Home Page

Return to the home page of the employer you wish to associate to the corporate entity, and click **LINK TO CORPORATE ENTITY**.

Employer Home:

[Edit](#) [Create Employment Ontario Case](#) [Refresh](#) [Print](#)

Name	
Trading / Business Name	D's Candy Co
Business Identification Number	
Registration Date	15/10/2018
Sensitivity	1
Registered / Legal Name	D's Candy Co
Preferred Language	English
Preferred Communication	
Corporate Entity	<a href="#">[Link to Corporate Entity]</a>
Corporate CRA Number	
Total Number of Employees in Corporation	0
Status	Active

### ➡ Step 6: Set Corporate Entity Page

Select a **New Corporate Entity** and click **SAVE**.

#### Set Corporate Entity: D's Candy Co



\* required field

Change Corporate Entity

New Corporate Entity \*

D's Candy Co



Save

Cancel

# EOIS-CaMS: Service Provider User Guide

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## ➡ Step 7: Employer Home Page

Note that the employer is now linked to the **Corporate Entity**.

Employer Home:

[★ Edit](#) [★ Create Employment Ontario Case](#) [↻](#) [🖨](#)

Name

Trading / Business Name	D's Candy Co	Registered / Legal Name	D's Candy Co
Business Identification Number		Preferred Language	English
Registration Date	15/10/2018	Preferred Communication	
Sensitivity	1	Corporate Entity	<a href="#">D's Candy Co [Change Corporate Entity]</a>

## 7.5.3 Select Existing Corporate Entity and Create New Employer

### System Steps

#### ➔ Step 1: Workspace Page

Click CREATE A NEW EMPLOYER or CORPORATE ENTITY from the **My Shortcuts** list.



#### ➔ Step 2: Confirm Employer Not Already Registered Page



This step is to confirm whether the corporate entity/employer already exists in the system. The **CRA Number** also searches the **Business Identification Number** field within employer records as this field has historically captured the CRA Number. Complete all necessary fields, and click SEARCH.

In the **Search Results** table, the **Corporate/Branch** field indicates if the employer is associated to a corporate entity (“Corporate”) or not (“Unassociated Branch”). Records appearing with “Corporate” should be toggled to view the associated branches or to add a new branch to the corporate entity.



# EOIS-CaMS: Service Provider User Guide

Confirm Employer Not Already Registered


   
\* required field

Search Criteria

Trading / Business Name  Registered / Legal Name

CRA Number  Postal Code

Search Results

Corporate / Branch	Reference Number	CRA Number	Trading / Business Name	Registered / Legal Name	Business City	Registration Date	Last Updated
 Corporate	<a href="#">10240809987</a>	113456789	Paperclip Company	Paperclip Company	TORONTO	15/10/2018	15/10/2018 11:26

In this scenario, the correct corporate entity was found but not the correct employer (branch). Click ADD NEW BRANCH next to the appropriate corporate entity.


Search Criteria

Trading / Business Name  Registered / Legal Name

CRA Number  Postal Code

Search Results

Corporate / Branch	Reference Number	CRA Number	Trading / Business Name	Registered / Legal Name	Business City	Registration Date	Last Updated
▼ Corporate	<a href="#">10240809987</a>	113456789	Paperclip Company	Paperclip Company	TORONTO	15/10/2018	15/10/2018 11:26



## ➡ Step 3: Confirm Employer Not Already Registered

Complete all necessary fields, and click SEARCH. If employer is not found, click CONTINUE.

Confirm Employer Not Already Registered

Enter search criteria to help you determine if the employer has been registered before.

Search Criteria

Employer Reference Number  Business City

Trading / Business Name  Registered / Legal Name

Search Results (Number of Items: 0)

Case Reference	Employer Reference Number	Trading / Business Name	Registered / Legal Name	Business City	Last Updated
----------------	---------------------------	-------------------------	-------------------------	---------------	--------------

# EOIS-CaMS: Service Provider User Guide

## ➤ Step 4: Register Employer Page

The system will display the Register Employer page pre-populating data fields that were entered by the user as search criteria. The user has the ability to modify these pre-populated fields. Enter as much information as possible into the available fields. Fields marked with an asterisk are mandatory.

Complete all remaining required fields.

Register Employer Register Cancel Refresh Print  
\* required field

Registered Office

Trading / Business Name *	Paperclips and Staples	Registered / Legal Name *	Paperclips and Staples
Business Identification Number		Preferred Language *	English
Registration Date *	15/10/2018	Preferred Communication	

Further Details

An Address Details page will load for the postal code where users will enter the street number, unit or suite number and any other relevant information.

**Address Details** Close

Canada Post provides the populated address information. Please complete additional address fields where necessary. \* required field

Mailing Address

Street Number	777	Suffix		Unit/Suite/Apt	422
Street Name	BAY	Street Type	Street	Street Direction	
Delivery Mode		PO Box or Route Number		Delivery Installation Type	
City/Town	TORONTO	Province	ON	Delivery Installation Qualifier	
Country	CANADA	Postal Code	M5G2E5		

Continue Cancel

Click the CONTINUE button to return to the Register Employer page. The address fields on the page will populate with the information.

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If the address cannot be found in the Address Details page, verify the address on [Canada Post's website](#).

Ensure the **Same as Business Address** checkbox is selected if this is the case.

Registered / Corporate Address

Same as Business Address

The six-digit **NAICS Code** is the North American Industry Classification System code. The system will not search for the **NAICS Code**; it must be retrieved manually from the Internet. The system validates the code and will produce an error if it is not a valid code. The **Contact Type** for the initial registration must have a value of "Primary."

Click REGISTER to complete.

Register Employer

[Register](#) [Cancel](#) [Refresh](#) [Print](#)  
\* required field

Registered Office

Trading / Business Name *	Paperclips and Staples	Registered / Legal Name *	Paperclips and Staples
Business Identification Number		Preferred Language *	English
Registration Date *	15/10/2018	Preferred Communication	

## ➔ Step 5: Employer Registration Completed Page

A page confirms successful registration. A system generated **Reference Number** will appear. This page provides a link to the employer's home page as well as a link to register additional employers. Select **CLICK HERE TO OPEN THE EMPLOYER HOME PAGE**.

### Employer Registration Completed

The employer registration process has been successfully completed.

The employer's reference number is 10240809991

[Click here to open the employer home page.](#)

[Click here to register another employer.](#)

## ➡ Step 6: Employer Home Page

Note that the employer is now linked to the **Corporate Entity**.

Employer Home:

[★ Edit](#) [★ Create Employment Ontario Case](#) [↻](#) [🖨](#)

Name

Trading / Business Name	Paperclips and Staples	Registered / Legal Name	Paperclips and Staples
Business Identification Number		Preferred Language	English
Registration Date	15/10/2018	Preferred Communication	
Sensitivity	1	Corporate Entity	<b>Paperclip Company [Change Corporate Entity]</b>

## 7.5.4 Select Existing Corporate Entity and Existing Employer

### System Steps

#### ➡ Step 1: Workspace Page

Click CREATE A NEW EMPLOYER or CORPORATE ENTITY from the **My Shortcuts** list.

The screenshot shows a dark blue header with the text "My Shortcuts". Below the header is a list of menu items in blue text. The item "Register an Employer or a Corporate Entity" is circled in red. Other items include "Register a Person", "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 LWI Application", "Search for a Corporate Entity", "Search for an Employer", "View My Bookmarks", and "View My Cases".

#### ➡ Step 2: Confirm Employer Not Already Registered Page

Complete all necessary fields and click SEARCH.

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Confirm Employer Not Already Registered



\* required field

Search Criteria

Trading / Business Name	<input type="text" value="Paperclip Co"/>	Registered / Legal Name	<input type="text"/>
CRA Number	<input type="text"/>	Postal Code	<input type="text"/>
<input type="button" value="Search"/> <input type="button" value="Reset"/> <input type="button" value="Register Corporate Entity"/>			

Search Results

Corporate / Branch	Reference Number	CRA Number	Trading / Business Name	Registered / Legal Name	Business City	Registration Date	Last Updated
--------------------	------------------	------------	-------------------------	-------------------------	---------------	-------------------	--------------

## ➡ Step 3A: Confirm Employer Not Already Registered Page

**If the employer (branch) exists under the correct corporate entity, select the Branch Reference Number. (Steps 3B-6 do not apply under this scenario)**

Search Criteria

Trading / Business Name	<input type="text" value="paperclip"/>	Registered / Legal Name	<input type="text"/>
CRA Number	<input type="text"/>	Postal Code	<input type="text"/>
<input type="button" value="Search"/> <input type="button" value="Reset"/> <input type="button" value="Register Corporate Entity"/>			

Search Results

Corporate / Branch	Reference Number	CRA Number	Trading / Business Name	Registered / Legal Name	Business City	Registration Date	Last Updated
Corporate	10240809887	113456789	Paperclip Company	Paperclip Company	TORONTO	15/10/2018	15/10/2018 13:01

Branches

Branch	Reference Number	CRA Number	Trading / Business Name	Registered / Legal Name	Business City	Registration Date	Last Updated
Associated Branch	10240809998		Pen Paperclip Co	Pen Paperclip Co	TORONTO	15/10/2018 12:43	
Associated Branch	10240809991		Paperclips and Staples	Paperclips and Staples	TORONTO	15/10/2018 12:07	

## ➡ Step 3B: Confirm Employer Not Already Registered Page

**If both the corporate entity and employer (branch) exist, but are not associated, there are two scenarios for creating this association:**

1. If they share a **CRA Number**, the employer will appear in the **Branches** list under the corporate employer. In this case, click ASSOCIATE next to the relevant employer.

# EOIS-CaMS: Service Provider User Guide

Branch	Reference Number	CRA Number	Trading / Business Name	Registered / Legal Name	Business City	Registration Date	Last Updated
Associated Branch	10240558363		CIMA Canada Inc.	CIMA Canada Inc.	LAVAL	23/04/2018	21/08/2018 15:53
Associated Branch	10240321026		Cima Canada Inc	Cima Canada Inc - Burlington	LAVAL		28/01/2014 11:17
Associated Branch	10240295699		CIMA Canada Inc.	Cima Canada Inc.	OTTAWA		29/04/2016 10:11
Unassociated Branch	<b>Associate</b> 10240302852		Cima Canada Inc.	Cima Canada Inc. - Kitchener	LAVAL	11/12/2013	11/12/2013 10:56

- If the corporate entity and the employer (branch) both appear in the search results but are not grouped together, due to the fact that the employer does not have a CRA Number or has a number that does not match that of the corporate entity, complete the following steps:

## System Steps

### ➔ Step 4: Confirm Employer Not Already Registered Page

Click the REFERENCE NUMBER next to the appropriate Unassigned Branch.

Confirm Employer Not Already Registered

Confirm Employer Not Already Registered

Search Criteria

Trading / Business Name: crayon Registered / Legal Name: \_\_\_\_\_  
 CRA Number: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Buttons: Search, Reset, Register Corporate Entity

Search Results

Corporate / Branch	Reference Number	CRA Number	Trading / Business Name	Registered / Legal Name	Business City	Registration Date	Last Updated
Corporate	10240811012	221456769	Crayon Rouge	Crayon Rouge	BURLINGTON	25/10/2018	25/10/2018 15:04
Corporate	10240811020	925599999	Crayons Inc	Crayons Inc	BURLINGTON	26/10/2018	26/10/2018 12:51
Corporate	10240811015	335444789	Crayon Bleu	Crayon Bleu	Burlington	25/10/2018	25/10/2018 19:35
Corporate	10240811019	967789777	red crayon	red crayon	BURLINGTON	26/10/2018	26/10/2018 12:19
Unassociated Branch	<b>10240811023</b>		blue crayon	blue crayon	burlington	26/10/2018	26/10/2018 12:54

### ➔ Step 5: Employer Home Page

Click LINK TO CORPORATE ENTITY.

Employer Home:

Name: \_\_\_\_\_

Trading / Business Name	blue crayon	Registered / Legal Name	blue crayon
Business Identification Number		Preferred Language	English
Registration Date	26/10/2018	Preferred Communication	
Sensitivity	1	Corporate Entity	<b>[Link to Corporate Entity]</b>
		Corporate CRA Number	
		Total Number of Employees in Corporation	0
		Status	Active

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---

## ➔ Step 6: Set Corporate Entity Page

Select a **New Corporate Entity**, and click SAVE.

Set Corporate Entity: blue crayon ⓧ

---

\* required field

Change Corporate Entity ▼

---

New Corporate Entity \*  🔍 ⓧ

---

Save Cancel

### 7.6 Registering a COJG Employer

Employers participating in COJG must be registered using a corporate-branch structure. The corporate entity captures all of the information relevant to the overall corporation, such as its CRA number and corporate address. Information relating to branch locations will be collected under the employer profile, just as they are for programs such as the Employment Service. There can be many employers (branches) associated to one corporate entity.



Historical employer information in EOIS-CaMS has been captured at the employer (branch) level; therefore, many existing employers may not be associated to corporate entities. As outlined in the steps that follow, there will be four scenarios that can be encountered when registering a COJG employer:

- Neither the corporate entity nor the employer (branch) exists and both must be registered.
- The branch (employer) exists but its corporate entity must be created and the branch must be associated to it.
- The corporate entity exists but a new employer (branch) needs to be created and associated to it.
- Both the corporate entity and employer (branch) already exist and the user can proceed with creating a COJG service plan.

#### Prerequisites:

For employers being registered for Canada-Ontario Job Grant (COJG) service plans, registration **must** begin from an approved COJG application.

Note: COJG applications are discussed in Chapter 12.

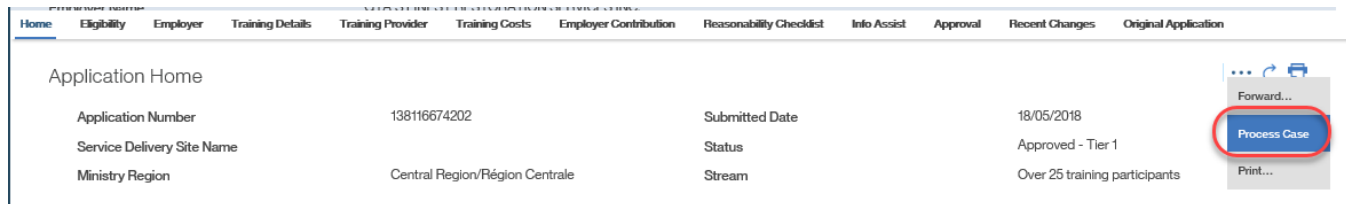


## 7.6.1 Create New Corporate Entity and New Employer

### System Steps

#### ➤ Step 1: COJG Application Home Page

From the **Action Button**, click PROCESS CASE.



#### ➤ Step 2: Confirm Employer Not Already Registered Page

This step is to confirm whether the employer already exists in the system. The four search criteria are prepopulated from the COJG application but can be further refined as required. The CRA Number also searches the Business Identification Number field within employer records as this field has historically captured the CRA Number.



In order to retrieve the most accurate search results, it is recommended that users first search using **only the CRA Number** since this field should produce the most accurate results. If this search does not retrieve a relevant employer (branch) or corporate entity, next use the **Business Name only**. Note the system performs partial searches and more search results should appear if a shortened version of the name is used. For example, when trying to find “Bob Jones Automotive,” search using “Bob Jones” or “Jones Automotive.” These results can be further refined using the **Legal Name** and **Postal Code** fields.

Complete all necessary fields, and click SEARCH. In the **Search Results** table, the **Corporate/Branch** field indicates if the employer is associated to a corporate entity (“Corporate”) or not (“Unassociated Branch”). Records appearing with “Corporate” should be toggled to view the associated branches or to add a new branch to the corporate entity.

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In this scenario, the employer was not found. Click REGISTER CORPORATE ENTITY.

Search Criteria

Trading / Business Name	<input type="text" value="Cooper &amp; Associates"/>	Registered / Legal Name	<input type="text"/>
CRA Number	<input type="text"/>	Postal Code	<input type="text" value="M3J 3E5"/>
Business City	<input type="text"/>		

Search Results

Corporate / Branch	Reference Number	CRA Number	Trading / Business Name	Registered / Legal Name	Business City	Registration Date	Last Updated
--------------------	------------------	------------	-------------------------	-------------------------	---------------	-------------------	--------------

## ➡ Step 3: Register Corporate Entity Page

The data from the COJG application continues to prepopulate on this page. For the address, however, only the postal code will prepopulate; the address(es) must still be retrieved using the postal code look-up functionality. Remember that this information relates to the employer's corporate head office. Complete the required fields and click REGISTER.

Register Corporate Entity

\* required field

Registered Office

Registered / Legal Name *	<input type="text" value="Cooper &amp; Associates"/>	Trading / Business Name *	<input type="text" value="Cooper &amp; Associates"/>
CRA Number *	<input type="text"/>	Total Number of Employees in Corporation *	<input type="text" value="70"/>
Year Business Registered	<input type="text" value="2009"/>	Preferred Language *	<input type="text" value="English"/>
Preferred Communication	<input type="text"/>		

## ➡ Step 4: Corporate Entity Registration Completed Page

Now that the corporate entity has been created, the next step in this scenario is to create the employer (branch) under this corporate entity. Click CREATE NEW EMPLOYER FOR THIS CORPORATE ENTITY.

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## Confirm Employer Not Already Registered

### Corporate Entity Registration Completed

The Corporate Entity registration process has been successfully completed.

The Corporate Entity's reference number is 10240809992

[Create New Employer for this Corporate Entity](#)

[Click here to open the Corporate Entity home page.](#)

[Click here to register another Corporate Entity.](#)

### ➡ Step 5: Confirm Employer Not Already Registered Page

The relevant fields will be prepopulated from the application. Upon confirming employer is not already registered, click CONTINUE.

#### Confirm Employer Not Already Registered

Enter search criteria to help you determine if the employer has been registered before.

##### Search Criteria

Employer Reference Number	<input type="text"/>	Business City	<input type="text"/>
Trading / Business Name	Cooper & Associates	Registered / Legal Name	<input type="text"/>
<input type="button" value="Search"/> <input type="button" value="Reset"/> <input type="button" value="Continue"/>			

##### Search Results

### ➡ Step 6: Register Employer Page

Relevant fields will be prepopulated from the application. Complete all remaining required fields.

#### Register Employer

[★ Register](#) [✖ Cancel](#) [↺](#) [🖨](#)

\* required field

##### Registered Office

Trading / Business Name *	Cooper & Associates	Registered / Legal Name *	Cooper & Associates
Business Identification Number	<input type="text"/>	Preferred Language *	English
Registration Date *	15/10/2018	Preferred Communication	<input type="text"/>

##### Further Details

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An Address Details page will load for the postal code where users will enter the street number, unit or suite number and any other relevant information.

Click the CONTINUE button to return to the Register Employer page. The address fields on the page will populate with the information.

## Address Details



Canada Post provides the populated address information. Please complete additional address fields where necessary.

\* required field

### Mailing Address

Street Number	<input type="text" value="777"/>	Suffix	<input type="text"/>	Unit/Suite/Apt	<input type="text" value="422"/>
Street Name	BAY	Street Type	Street	Street Direction	
Delivery Mode		PO Box or Route Number			
Delivery Installation Type		Delivery Installation Qualifier			
City/Town	TORONTO	Province	ON	Postal Code	M5G2E5
Country	CANADA				



If the address cannot be found in the Address Details page, verify the address on [Canada Post's website](#).

Ensure the **Same as Business Address** checkbox is selected if this is the case.

### Registered / Corporate Address

Same as Business Address

The six-digit **NAICS Code** is the North American Industry Classification System code. The system will not search for the **NAICS Code**; it must be retrieved manually from the Internet. The system validates the code and will produce an error if it is not a valid code. The **Contact Type** for the initial registration must have a value of "Primary."

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Company Contact

Contact Name \* MJ Lalonde **Contact Type \*** Primary

Contact Phone Number

Primary	Phone Number		TTY	<input type="checkbox"/>
Alternate	Phone Number		TTY	<input type="checkbox"/>

Contact Email Address mj@gtasfinest.ca

Trading Details

Type of Sector \* Private **NAICS Code \***

Communication Exception

Method Reason

From To

Click REGISTER to complete.

Register Employer

**Register** **Cancel**

\* required field

Registered Office

Trading / Business Name \* Cooper & Associates Registered / Legal Name \* Cooper & Associates

Business Identification Number Preferred Language \* English

Registration Date \* 15/10/2018 Preferred Communication

Further Details

## ➡ Step 7: Employer Registration Completed Page

A page confirms successful registration. A system generated **Reference Number** will appear. This page provides a link to the employer's home page as well as a link to register additional employers. Select **CLICK HERE TO OPEN THE EMPLOYER HOME PAGE**.

### Employer Registration Completed

The employer registration process has been successfully completed.

The employer's reference number is 10240809993

[Click here to open the employer home page.](#)

## ➡ Step 8: Employer Home Page

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Note that the employer is now linked to the **Corporate Entity**. An Employment Ontario Case can now be created for the employer (refer to Section 7.5) in order to create a COJG Employer Service Plan (refer to Chapter 8C).

## 7.6.2 Create New Corporate Entity and Select Existing Employer

### System Steps

#### ➔ Step 1: COJG Application Home Page

From the **Action Button**, click PROCESS CASE.

Application Number	125226594806	Submitted Date	20/12/2017
Service Delivery Site Name		Status	Approved - Tier 1
Ministry Region	Central Region/Région Centrale	Stream	25 or fewer training participants

#### ➔ Step 2: Confirm Employer Not Already Registered Page

This step is to confirm whether the employer already exists in the system. The four search criteria are prepopulated from the COJG application but can be further refined as required. The **CRA Number** also searches the **Business Identification Number** field within employer records as this field has historically captured the CRA Number. Click SEARCH.

In the **Search Results** table, the **Corporate/Branch** field indicates if the employer is associated to a corporate entity (“Corporate”) or not (“Unassociated Branch”). Records appearing with “Corporate” should be toggled to view the associated branches or to add a new branch to the corporate entity.

In this scenario, the employer was found as an Unassociated Branch. Since the employer exists but the corporate entity needs to be created, click REGISTER CORPORATE ENTITY.

Search Criteria

Trading / Business Name	Cooper & Associates	Registered / Legal Name	Cooper & Associates
CRA Number		Postal Code	
Business City			

Search Results

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## ➤ Step 3: Register Corporate Entity Page

The data from the COJG application continues to prepopulate on this page. For the address, however, only the postal code will prepopulate; the address(es) must still be retrieved using the postal code look-up functionality. Remember that this information relates to the employer's corporate head office. Complete the required fields and click REGISTER.

Register Corporate Entity

[Register](#) [Cancel](#) [Refresh](#) [Print](#)  
\* required field

Registered Office

Registered / Legal Name *	Cooper & Associates	Trading / Business Name *	Cooper & Associates
CRA Number *	<input type="text"/>	Total Number of Employees in Corporation *	86
Year Business Registered	1952	Preferred Language *	English
Preferred Communication	<input type="text"/>		

## ➤ Step 4: Corporate Entity Registration Completed Page

Now that the corporate entity has been created, the next step in this scenario is to associate the employer (branch) under this corporate entity.

### Corporate Entity Registration Completed

The Corporate Entity registration process has been successfully completed.

The Corporate Entity's reference number is 10240809994

[Create New Employer for this Corporate Entity](#)

[Click here to open the Corporate Entity home page.](#)

[Click here to register another Corporate Entity.](#)

## ➤ Step 5: Employer Home Page

Return to the home page of the employer you wish to associate to the corporate entity, and click LINK TO CORPORATE ENTITY.

Registered / Legal Name	Scoopers
Preferred Language	English
Preferred Communication	
Corporate Entity	<a href="#">[Link to Corporate Entity]</a>
Corporate CRA Number	

# EOIS-CaMS: Service Provider User Guide

## ➤ Step 6: Set Corporate Entity Page

Select a **New Corporate Entity** and click SAVE.

Set Corporate Entity: Scoopers

\* required field

Change Corporate Entity

New Corporate Entity \* Cooper & Associates

Save Cancel

## ➤ Step 7: Employer Home Page

Note that the employer is now linked to the **Corporate Entity**. An Employment Ontario Case can now be created for the employer (refer to Section 7.5) in order to create a COJG Employer Service Plan (refer to Chapter 8C).

Registered / Legal Name	Scoopers
Preferred Language	English
Preferred Communication	
Corporate Entity	Cooper & Associates <a href="#">Change Corporate Entity</a>
Corporate CRA Number	223456789
Total Number of Employees in Corporation	88
-	A ..

### 7.6.3 Select Existing Corporate Entity and Create New Employer

#### System Steps

##### ➤ Step 1: COJG Application Home Page

From the **Action Button**, click PROCESS CASE.

Application Home

Application Number	123853457385	Submitted Date	04/12/2017
Service Delivery Site Name		Status	Approved - Tier 1
Ministry Region	Central Region/Région Centrale	Stream	Over 25 training participants

Forward...  
Process Case  
Print...



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## ➡ Step 2: Confirm Employer Not Already Registered Page


This step is to confirm whether the employer already exists in the system. The four search criteria are prepopulated from the COJG application but can be further refined as required. The **CRA Number** also searches the **Business Identification Number** field within employer records as this field has historically captured the CRA Number. Click SEARCH.

In the **Search Results** table, the **Corporate/Branch** field indicates if the employer is associated to a corporate entity (“Corporate”) or not (“Unassociated Branch”). Records appearing with “Corporate” should be toggled to view the associated branches or to add a new branch to the corporate entity.

Search Criteria

Trading / Business Name	<input type="text" value="Cooper &amp; Associates"/>	Registered / Legal Name	<input type="text" value="Cooper &amp; Associates"/>
CRA Number	<input type="text"/>	Postal Code	<input type="text"/>
Business City	<input type="text"/>		

Search Results

Corporate / Branch	Reference Number	CRA Number	Trading / Business Name	Registered / Legal Name	Business City	Registration Date	Last Updated
 Corporate	<a href="#">10240809995</a>	223456789	Cooper & Associates	Cooper & Associates	TORONTO	15/10/2018	15/10/2018 13:52

In this scenario, the correct corporate entity was found but not the correct employer (branch). Click ADD NEW BRANCH next to the appropriate corporate entity.

Search Criteria

Trading / Business Name	<input type="text" value="Cooper &amp; Associates"/>	Registered / Legal Name	<input type="text" value="Cooper &amp; Associates"/>
CRA Number	<input type="text"/>	Postal Code	<input type="text"/>
Business City	<input type="text"/>		

Search Results

Corporate / Branch	Reference Number	CRA Number	Trading / Business Name	Registered / Legal Name	Business City	Registration Date	Last Updated
▼ Corporate	<a href="#">10240809995</a>	223456789	Cooper & Associates	Cooper & Associates	TORONTO	15/10/2018	15/10/2018 13:52

Branches

## ➡ Step 3: Confirm Employer Not Already Registered

Complete all necessary fields, and click CONTINUE.

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## Confirm Employer Not Already Registered

Enter search criteria to help you determine if the employer has been registered before.

  \* required field

### Search Criteria

Employer Reference Number	<input type="text"/>	Business City	<input type="text"/>
Trading / Business Name	Cooper & Associates	Registered / Legal Name	<input type="text"/>

### Search Results

Case Reference	Employer Reference Number	Trading / Business Name	Registered / Legal Name	Corporate Entity	Business City	Last Updated	Trading Status
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## ➡ Step 4: Register Employer Page

Relevant fields will be prepopulated from the application. Complete all remaining required fields.

## Register Employer

    \* required field

### Registered Office

Trading / Business Name *	Cooper & Associates	Registered / Legal Name *	Cooper & Associates
Business Identification Number	<input type="text"/>	Preferred Language *	English
Registration Date *	15/10/2018	Preferred Communication	<input type="text"/>

### Further Details

An Address Details page will load for the postal code where users will enter the street number, unit or suite number and any other relevant information.

## Address Details

Canada Post provides the populated address information. Please complete additional address fields where necessary.

\* required field

### Mailing Address

Street Number	777	Suffix	<input type="text"/>	Unit/Suite/Apt	422
Street Name	BAY	Street Type	Street	Street Direction	<input type="text"/>
Delivery Mode	<input type="text"/>	PO Box or Route Number	<input type="text"/>	Delivery Installation Type	<input type="text"/>
City/Town	TORONTO	Province	ON	Postal Code	M5G2E5
Country	CANADA				

Click the CONTINUE button to return to the Register Employer page. The address fields on the page will populate with the information.

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If the address cannot be found in the Address Details page, verify the address on [Canada Post's website](#).

Ensure the **Same as Business Address** checkbox is selected if this is the case.

Registered / Corporate Address

Same as Business Address

The six-digit **NAICS Code** is the North American Industry Classification System code. The system will not search for the **NAICS Code**; it must be retrieved manually from the Internet. The system validates the code and will produce an error if it is not a valid code. The **Contact Type** for the initial registration must have a value of "Primary".

Click REGISTER to complete.

Register Corporate Entity



\* required field

Registered Office

Registered / Legal Name *	Cooper & Associates	Trading / Business Name *	Cooper & Associates
CRA Number *	<input type="text"/>	Total Number of Employees in Corporation *	86
Year Business Registered	1952	Preferred Language *	English
Preferred Communication	<input type="text"/>		

## ➡ Step 5: Employer Registration Completed Page

A page confirms successful registration. A system generated **Reference Number** will appear. This page provides a link to the employer's home page as well as a link to register additional employers. Select **CLICK HERE TO OPEN THE EMPLOYER HOME PAGE**.

### Employer Registration Completed

The employer registration process has been successfully completed.

The employer's reference number is 10240809993

[Click here to open the employer home page.](#)

## ➡ Step 6: Employer Home Page

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Note that the employer is now linked to the **Corporate Entity**. An Employment Ontario Case can now be created for the employer (refer to Section 7.5) in order to create a COJG Employer Service Plan (refer to Chapter 8C).

Preferred Language	English
Preferred Communication	
Corporate Entity	<b>Cooper &amp; Associates</b> <a href="#">Change Corporate Entity]</a>
Corporate CRA Number	223456789
Total Number of Employees in Corporation	88

## 7.6.4 Select Existing Corporate Entity and Existing Employer

### System Steps

#### ➔ Step 1: COJG Application Home Page

From the **Action Button**, click PROCESS CASE.

Application Home				...
Application Number	123853457385	Submitted Date	04/12/2017	Forward...
Service Delivery Site Name		Status	Approved - Tier 1	<b>Process Case</b>
Ministry Region	Central Region/Région Centrale	Stream	Over 25 training participants	Print...

#### ➔ Step 2: Confirm Employer Not Already Registered Page

Complete all necessary fields and click SEARCH. Two fields are pre-populated: the **Trading/Business Name** is the operating name and **Registered Name/Legal** is the legal name.

Search Criteria

Trading / Business Name	Cooper & Associates	Registered / Legal Name	
CRA Number		Postal Code	
Business City			

Search Results

Corporate / Branch	Reference Number	CRA Number	Trading / Business Name	Registered / Legal Name	Business City	Registration Date	Last Updated
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# EOIS-CaMS: Service Provider User Guide

## ➤ Step 3A: Confirm Employer Not Already Registered Page

If the employer (branch) exists under the correct corporate entity, select the **Branch Reference Number**. An Employment Ontario Case can now be created for the employer (refer to Section 7.5) in order to create a COJG Employer Service Plan (refer to Chapter 8C). **Steps 3B-6 do not apply under this scenario.**

Confirm Employer Not Already Registered

\* required field

Search Criteria

Trading / Business Name: crayon Registered / Legal Name: \_\_\_\_\_  
 CRA Number: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Search    Reset    Register Corporate Entity

Search Results

Corporate / Branch	Reference Number	CRA Number	Trading / Business Name	Registered / Legal Name	Business City	Registration Date	Last Updated
Corporate	10240811012	221456789	Crayon Rouge	Crayon Rouge	BURLINGTON	25/10/2018	25/10/2018 15:04
Corporate	10240811020	929999999	Crayons Inc	Crayons Inc	BURLINGTON	29/10/2018	29/10/2018 13:11

Add New Branch

Branches

Branch	Reference Number	CRA Number	Trading / Business Name	Registered / Legal Name	Business City	Registration Date	Last Updated
Associated Branch	10240811025		orange crayon	orange crayon	burlington	29/10/2018	29/10/2018 13:11
Associated Branch	10240811022		red crayon	red crayon	burlington	29/10/2018	29/10/2018 12:51
Associated Branch	10240811023		blue crayon	blue crayon	burlington	29/10/2018	29/10/2018 12:54

## ➤ Step 3B: Confirm Employer Not Already Registered Page

If both the corporate entity and employer (branch) exist, but are not associated, there are two scenarios for creating this association:

1. If they share a **CRA Number**, the employer will appear in the **Branches** list under the corporate employer. In this case, click ASSOCIATE next to the relevant employer. Once the association is complete, click on the employer (branch) reference number to continue with EO Case Creation (refer to Section 7.5) and COJG employer service plan setup (refer to Chapter 8C).

Corporate: 10240557093    076223433    CIMA Canada Inc.    CIMA Canada Inc. - Mississauga    LAVAL    20/04/2018    21/08/2018 15:53

Branches

Branch	Reference Number	CRA Number	Trading / Business Name	Registered / Legal Name	Business City	Registration Date	Last Updated
Associated Branch	10240558363		CIMA Canada Inc.	CIMA Canada Inc.	LAVAL	28/04/2018	28/04/2018 10:48
Associated Branch	10240321026		Cima Canada Inc	Cima Canada Inc - Burlington	LAVAL	29/01/2014	29/01/2014 11:17
Associated Branch	10240295699		CIMA Canada Inc.	Cima Canada Inc.	OTTAWA	29/04/2016	29/04/2016 10:11
Unassociated Branch	Associate	10240302852	Cima Canada Inc.	Cima Canada Inc. - Kitchener	LAVAL	11/12/2013	11/12/2013 10:56

2. If the corporate entity and the employer (branch) both appear in the search results but are not grouped together, due to the fact that the employer does not have a CRA

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Number or has a number that does not match that of the corporate entity, complete the following steps:

## System Steps

### ➔ Step 4: Confirm Employer Not Already Registered Page

Click the REFERENCE NUMBER next to the appropriate Unassigned Branch.

Confirm Employer Not Already Registered

Search Criteria

Trading / Business Name: crayon Registered / Legal Name: [ ]  
CRA Number: [ ] Postal Code: [ ]

Buttons: Search, Reset, Register Corporate Entity

Search Results

Corporate / Branch	Reference Number	CRA Number	Trading / Business Name	Registered / Legal Name	Business City	Registration Date	Last Updated
Corporate	10240811012	221456789	Crayon Prouce	Crayon Prouce	BURLINGTON	25/10/2018	25/10/2018 15:04
Corporate	10240811020	925599999	Crayons Inc	Crayons Inc	BURLINGTON	26/10/2018	26/10/2018 12:51
Corporate	10240811015	53344789	Crayon Elieu	Crayon Elieu	Burlington	25/10/2018	25/10/2018 19:35
Corporate	10240811019	96789777	red crayon	red crayon	BURLINGTON	26/10/2018	26/10/2018 12:19
Unassociated Branch	10240811023		blue crayon	blue crayon	burlington	26/10/2018	26/10/2018 12:54

### ➔ Step 5: Employer Home Page

Click LINK TO CORPORATE ENTITY.

Employer Home: Edit Create Employment Ontario Case

Name: [ ]

Trading / Business Name	blue crayon	Registered / Legal Name	blue crayon
Business Identification Number		Preferred Language	English
Registration Date	26/10/2018	Preferred Communication	
Sensitivity	1	Corporate Entity	[Link to Corporate Entity]
		Corporate CRA Number	
		Total Number of Employees in Corporation	0
		Status	Active

### ➔ Step 6: Set Corporate Entity Page

Select a **New Corporate Entity**, and click SAVE.

An Employment Ontario Case can now be created for the employer (refer to Section 7.5) in order to create a COJG Employer Service Plan (refer to Chapter 8C).

# EOIS-CaMS: Service Provider User Guide

Set Corporate Entity: blue crayon ⓧ

---

\* required field

Change Corporate Entity ▼

---

New Corporate Entity \*  🔍 ⓧ

---

Save Cancel

## 7.7 Creating an EO Case for Employer

Prerequisites:

Employer profile must exist.

System Steps

➡ Step 1: Employer Home Page

Click CREATE EMPLOYMENT ONTARIO CASE.

Home Cases Service Plan Cases Contact Administration Alternative IDs History Trading Status Employer Review

Employer Home: ✦ Edit ✦ Create Employment Ontario Case ↻ 🖨

Name ▼

Trading / Business Name	Pen Paperclip Co	Registered / Legal Name	Pen Paperclip Co
Business Identification Number		Preferred Language	English
Registration Date	15/10/2018	Preferred Communication	
Sensitivity	1	Corporate Entity	Paperclip Company [Change Corporate Entity]

➡ Step 2: Create Employment Ontario Case Page

Click SUBMIT.

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## Create Employment Ontario Case



Are you sure you want to create a Employment Ontario Case for the Employer?



These fields can be found on the COJG Application for Employers/Consortia.

### ➡ Step 3: Employment Ontario Home Page

The Employment Ontario Home page for the employer is displayed.

The creation of the COJG Employer Service Plan can now commence (refer to Chapter 8C).

[Home](#) [Events](#) [Administration](#) [Recent Changes](#) [Assessments](#)

Employment Ontario Home



Details

Case Reference	5901939	Received Date	15/10/2018
Primary Client	<a href="#">Pen Paperclip Co</a>	Type	Employment Ontario
Creation Date	15/10/2018	Status	Open
Owner Type	Organization Unit	Owner	Employment Ontario

Service Plans

Reference Number	Member	Type	Goal	Status	Date Created
------------------	--------	------	------	--------	--------------

Case Members

Comments

[Pen Paperclip Co](#)

Recent Changes



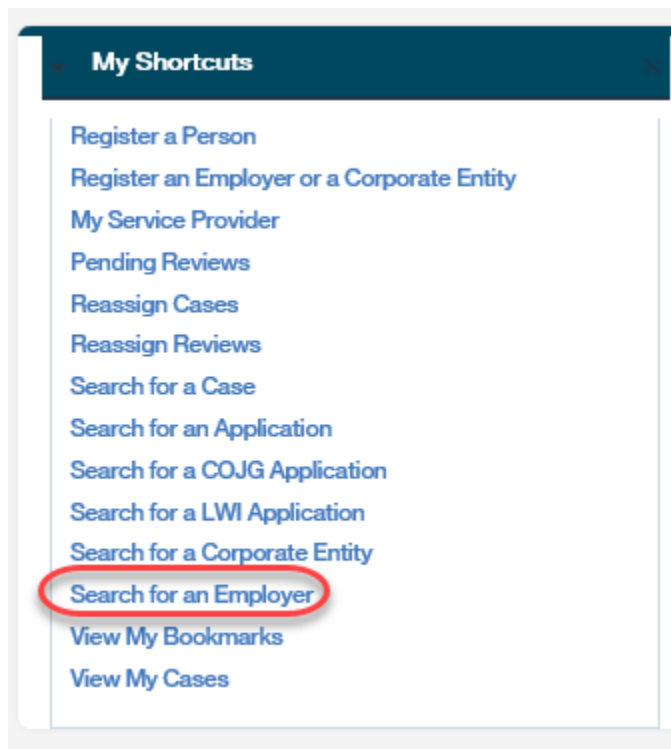
## 7.8 Modifying and Maintaining Employer Profile

### 7.8.1 Modifying an Employer

System Steps

➡ Step 1: Workspace Page

Click SEARCH FOR AN EMPLOYER.



➡ Step 2: Employer Search Page

Complete all necessary fields, and click SEARCH. Click the REFERENCE NUMBER next to the employer to view its home page.

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## Search Criteria

Employer Reference Number	<input type="text"/>	Business City	<input type="text"/>
Trading / Business Name	<input type="text" value="Paperclip"/>	Registered / Legal Name	<input type="text"/>
Include Employers with Liquidated Trading Status	<input type="checkbox"/>	Include Employers with 'Opened in error' Trading Status	<input type="checkbox"/>


## Search Results (Number of Items: 4 out of 4)

Case Reference	Employer Reference Number	Trading / Business Name	Registered / Legal Name	Business City	Last Updated	Trading Status
<a href="#">5901939</a>	<a href="#">10240809988</a>	Pen Paperclip Co	Pen Paperclip Co	TORONTO	15/10/2018 12:17	
	<a href="#">10240809991</a>	Paperclips and Staples	Paperclips and Staples	TORONTO	15/10/2018 12:07	

### ➡ Step 3: Employer Home Page

Click EDIT.

Home Cases Service Plan Cases Contact Administration Alternative IDs History Trading Status Employer Review

Employer Home: 

Name ▼

Trading / Business Name	Pen Paperclip Co	Registered / Legal Name	Pen Paperclip Co
Business Identification Number		Preferred Language	English
Registration Date	15/10/2018	Preferred Communication	
Sensitivity	1	Corporate Entity	<a href="#">Paperclip Company [Change Corporate Entity]</a>
		Corporate CRA Number	113456789
		Total Number of Employees in Corporation	88

### ➡ Step 4: Modify Employer Page

Modify fields as necessary, and click SAVE. Additional information such as addresses and phone numbers can also be modified in the **Contact** tab. For more detail, refer to Chapter 3.

# EOIS-CaMS: Service Provider User Guide

Modify Employer: Pen Paperclip Co -10240809988



\* required field

## Details

Trading / Business Name *	<input type="text" value="Pen Paperclip Co"/>	Registered / Legal Name *	<input type="text" value="Pen Paperclip Co"/>
Preferred Language *	<input type="text" value="English"/>	Registration Date *	<input type="text" value="15/10/2018"/>
Preferred Communication	<input type="text"/>	Status	Active

## Further Details

Total Number of Employees in Branch *	<input type="text" value="23"/>	Business Description	<input type="text"/>
---------------------------------------	---------------------------------	----------------------	----------------------

## Trading Details

Type of Sector *	<input type="text" value="Private"/>	NAICS Code *	<input type="text" value="236110"/>
------------------	--------------------------------------	--------------	-------------------------------------

## Comments

## 7.8.2 Adding Contacts

If an employer has been previously registered by another user and the contact associated to that employer is not affiliated, additional contacts must be added. All additional contacts must have a **Contact Type** of “Alternate.”



Do not edit or enter a **To** date for a contact that has previously been created.

### System Steps

#### ➡ Step 1: Employer Home Page

Click the **Contact** tab and select **Contacts** in the Tab Content Bar.

Name	Type	From	To	Status	Last Updated
John Dowe	Primary	15/10/2018		Active	...

#### ➡ Step 2: Contacts Page

Click **NEW**.

Name	Type	From	To	Status	Last Updated
John Dowe	Primary	15/10/2018		Active	...

#### ➡ Step 3: Create Contact Page

Complete all necessary fields. The **Type** must have a value of “Alternate.” The **From** date defaults to the current date. The **Address** is entered in an Address Details page through the Postal Code Lookup. Click **SAVE**.

# EOIS-CaMS: Service Provider User Guide

Create Contact: Pen Paperclip Co -10240809988 ✕

\* required field

Contact ▼

Name \*  Type \*

From \*  To

Address ▼

Please enter valid postal code and click Search button

Country  Postal Code to Lookup

[Search](#)

Address ▼

Apt/Suite  Street 1

Street 2  City

Province/State  Postal/Zip Code

Phone Number ▼

Area Code \*  Phone Number \*

Extension  TTY

Comments ▼

## ➡ Step 4: Contacts Page

The contact can now be viewed in the list on the Contacts page.

Contacts

Name	Type	From	To	Status	Last Updated
▶ <a href="#">John Dowe</a>	Primary	15/10/2018		Active	...
▶ <a href="#">Mister Blue</a>	Alternate	15/10/2018		Active	...

## 7.8.3. Alternative IDs

The system captures alternative IDs for employers. The alternative ID that is captured at the branch level is the employer's **Business Identification Number**.

### System Steps

#### ➤ Step 1: Employer Home Page

Click the **Alternative IDs** tab.

Employer Home: Edit Refresh Print

Name

Trading / Business Name	Pen Paperclip Co	Registered / Legal Name	Pen Paperclip Co
Business Identification Number		Preferred Language	English
Registration Date	15/10/2018	Preferred Communication	
Sensitivity	1	Corporate Entity	Paperclip Company <a href="#">[Change Corporate Entity]</a>

#### ➤ Step 2: Alternative IDs Page

Click NEW to add a new Alternative ID or EDIT from the **Action Button** next to the relevant record.

Alternative IDs New Refresh Print

Alternative ID	Type	From	Status
▶ 113456789	CRA Number	15/10/2018	Active

Edit...  
Delete...

#### ➤ Step 3: Modify Alternative ID Page

Modify necessary information, and click SAVE.



Alternative IDs cannot be entered with a **From** date in the future.

### Modify Alternative ID ✕

*\* required field*

Details

Alternative ID \*

From \*

Type CRA Number

Comments

## ➤ Step 4: Alternative IDs Page

The new or modified information from the previous page now appears.

## 7.9 Cases and Service Plans for Employers

### 7.9.1 Viewing ES, YJC and YJL Service Plans

#### System Steps

## ➤ Step 1: Employer Home Page

Click the **Service Plan Cases** tab.

Home Cases **Service Plan Cases** Contact Administration Alternative IDs History Trading Status Employer Review

Employer Home: Edit Refresh Print

Name

Trading / Business Name	Pen Paperclip Co	Registered / Legal Name	Pen Paperclip Co
Business Identification Number		Preferred Language	English
Registration Date	15/10/2018	Preferred Communication	
Sensitivity	1	Corporate Entity	Paperclip Company [Change Corporate Entity]

## ➤ Step 2: Service Plan Cases Page

# EOIS-CaMS: Service Provider User Guide

A list of all past and present service plans that are associated to the employer will appear. Click CASE REFERENCE next to the service plan to be viewed. This will open the Service Plan Home page for that service plan.

Case Reference	Primary Client	Program	Service Delivery Site	Start Date	Owner	Status
2418713	Katherine	Employment Service		18/09/2012		Closed

## 7.9.2 Viewing EO Case and COJG Service Plans

### System Steps

➔ Step 1: Employer Home Page

Click the **Cases** tab.

Name
Trading / Business Name: Pen Paperclip Co
Registered / Legal Name: Pen Paperclip Co
Business Identification Number
Preferred Language: English
Registration Date: 15/10/2018
Preferred Communication
Sensitivity: 1
Corporate Entity: Paperclip Company [Change Corporate Entity]
Corporate CRA Number: 113456789

➔ Step 2: Cases Page

A list of all past and present COJG service plans that are associated to the employer will appear as well as the Employment Ontario Case. Click CASE REFERENCE next to the record to be viewed. This will open the appropriate home page.

Case Reference	Type	Owner Type	Owner	Start Date	Status
5901939	Integrated Case	Organization Unit	Employment Ontario	15/10/2018	Open



## 7.10 Modifying a Corporate Entity

### System Steps

➔ Step 1: Workspace Page

Click SEARCH FOR A CORPORATE ENTITY.

The screenshot shows a dark blue header with the text "My Shortcuts" in white. Below the header is a list of shortcuts in blue text: "Register a Person", "Register an Employer or a Corporate Entity", "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 LWI Application", "Search for a Corporate Entity" (circled in red), "Search for an Employer", "View My Bookmarks", and "View My Cases".

➔ Step 2: Corporate Entity Search Page

Complete all necessary fields, and click SEARCH. Click on the appropriate CORPORATE ENTITY REFERENCE NUMBER to view its home page.

The screenshot shows a search form with the following fields: "Corporate Entity Reference Number" (empty), "CRA Number" (empty), "Trading / Business Name" (containing "Paperclip"), "Registered / Legal Name" (empty), "Postal Code" (empty), and "Business City" (empty). There are "Search" and "Reset" buttons at the bottom.

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




Corporate Entity Reference Number	CRA Number	Trading / Business Name	Registered / Legal Name	Business City	Last Updated	Trading Status
10240809987	113456789	Paperclip Company	Paperclip Company	TORONTO	15/10/2018 12:07	

➔ Step 3: Corporate Entity Home Page

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Click EDIT.

Home Contact Administration Alternative IDs History Trading Status Associated Branches

Corporate Entity Home:   

Name ▼

Registered / Legal Name	Paperclip Company	Trading / Business Name	Paperclip Company
CRA Number	113456789	Total Number of Employees in Corporation	88
Year Business Registered	2018	Preferred Language	English

## ➔ Step 4: Modify Corporate Entity Page

Modify fields as necessary, and click SAVE. Additional information such as addresses and phone numbers can also be modified in the **Contact** tab. For more detail, refer to Chapter 3.


### Modify Corporate Entity: Paperclip Company -10240809987

*\* required field*

Details ▼

Registered / Legal Name *	<input type="text" value="Paperclip Comp."/>	Trading / Business Name *	<input type="text" value="Paperclip Comp."/>
CRA Number *	<input type="text" value="113456789"/>	Total Number of Employees in Corporation *	<input type="text" value="88"/>
Year Business Registered	<input type="text" value="2018"/>	Preferred Language *	<input type="text" value="English"/> <span>▼</span>
Preferred Communication	<input type="text"/>	Status	Active

Comments ▼



## 7.10.1 Adding Contacts

Contacts added to the corporate entity should only be **contacts at the corporate level**. Branch-level contacts should be captured in the employer profile.

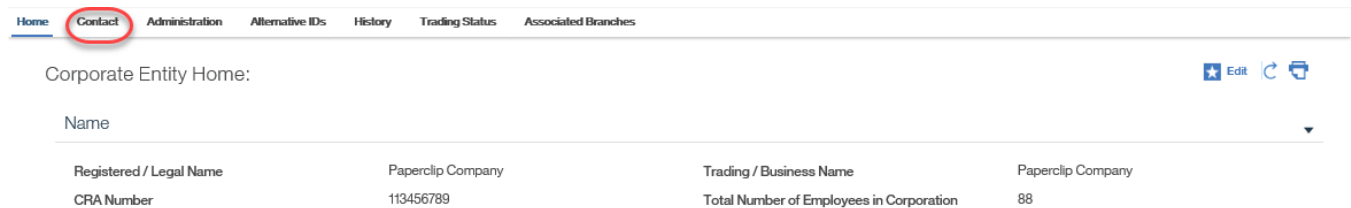


Do not edit or enter a **To** date for a contact that has previously been created.

### System Steps

#### ➡ Step 1: Corporate Entity Home Page

Click the **Contact** tab and select **Contacts** in the Tab Content Bar.



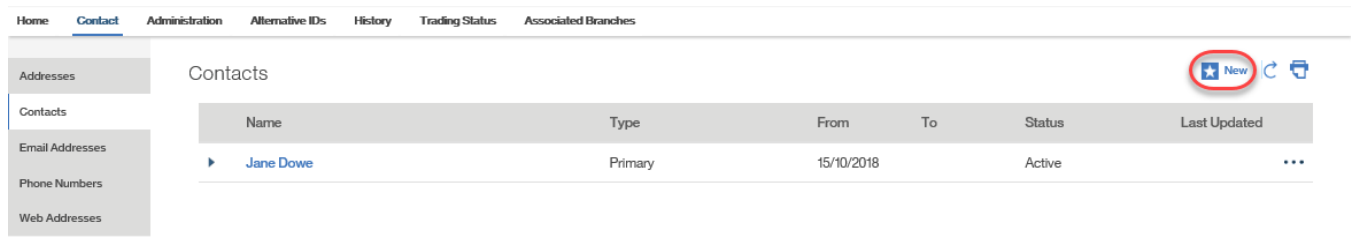
Corporate Entity Home: Edit Refresh Print

Name

Registered / Legal Name	Paperclip Company	Trading / Business Name	Paperclip Company
CRA Number	113456789	Total Number of Employees in Corporation	88

#### ➡ Step 2: Contacts Page

Click **NEW**.



Contacts New Refresh Print

Name	Type	From	To	Status	Last Updated
<a href="#">Jane Dowe</a>	Primary	15/10/2018		Active	...

#### ➡ Step 3: Create Contact Page


Complete all necessary fields. If a primary contact already exists, the **Type** must have a value of “Alternate.” The **From** date defaults to the current date. The **Address** is entered in an Address Details page through the Postal Code Lookup. Click **SAVE**.

# EOIS-CaMS: Service Provider User Guide

## Create Contact: Paperclip Company -10240809987

\* required field

Contact

Name \* Mister Purple Type \*  Alternate

From \* 15/10/2018 To

Address

Please enter valid postal code and click Search button

Country Canada Postal Code to Lookup M5G2E5 Search

Address

Apt/Suite 422 Street 1 777 BAY ST

Street 2 City TORONTO


Province/State Ontario Postal/Zip Code M5G2E5

Phone Number

Area Code \* 416 Phone Number \* 4447744

Extension TTY

Comments

 Save Save & New Cancel

### ➔ Step 4: Contacts Page

The contact can now be viewed in the list on Contacts page.

Home **Contact** Administration Alternative IDs History Trading Status Associated Branches




Addresses



Contacts

Email Addresses

Phone Numbers

Web Addresses

Contacts   

Name	Type	From	To	Status	Last Updated
 Jane Dowe	Primary	15/10/2018		Active	...
 Mister Purple	Alternate	15/10/2018		Active	...

## 7.10.2 Alternative IDs

The system captures the **CRA Number** for corporate entities.

# EOIS-CaMS: Service Provider User Guide

## System Steps

➔ Step 1: Corporate Entity Home Page

Click the **Alternative IDs** tab.

Paperclip Company -10240809987

Home Contact Administration **Alternative IDs** History Trading Status Associated Branches

Corporate Entity Home: Edit Refresh Print

Name

Registered / Legal Name	Paperclip Company	Trading / Business Name	Paperclip Company
CRA Number	113456789	Total Number of Employees in Corporation	88
Year Business Registered	2010	Professional Services	English

➔ Step 2: Alternative IDs Page

Click EDIT from the **Action Button** next to the relevant record.

Home Contact Administration **Alternative IDs** History Trading Status Associated Branches

Alternative IDs New Refresh Print

Alternative ID	Type	From	Status	
▶ 113456789	CRA Number	15/10/2018	Active	<span>Edit...</span> <span>Delete...</span>

➔ Step 3: Modify Alternative ID Page

Modify necessary information, and click SAVE.



Alternative IDs cannot be entered with a **From** date in the future.

Modify Alternative ID ✕

*\* required field*

Details

Alternative ID \*

From \*

Type CRA Number

Comments

## ➔ Step 4: Alternative IDs Page

The modified information from the previous page now appears.

### 7.10.3. Associated Branches

The **Associated Branches** tab lists all the employers that are associated to the corporate entity.

#### System Steps

## ➔ Step 1: Corporate Entity Home Page

Click the **Associated Branches** tab.

[Home](#) [Contact](#) [Administration](#) [Alternative IDs](#) [History](#) [Trading Status](#) [Associated Branches](#)

Corporate Entity Home: Edit Refresh Print

Name

Registered / Legal Name	Paperclip Company	Trading / Business Name	Paperclip Company
CRA Number	113456789	Total Number of Employees in Corporation	88
Year Business Registered	2018	Preferred Language	English

## ➔ Step 2: Associated Branches Page

The associated branches are listed.

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Home Contact Administration Alternative IDs History Trading Status Associated Branches

List of Associated Branches



List of Associated Branches

Case Reference	Employer Reference Number	Trading / Business Name	Registered / Legal Name	Business City	Last Updated	Trading Status
<a href="#">5901939</a>	<a href="#">10240809988</a>	Pen Paperclip Co	Pen Paperclip Co	TORONTO	15/10/2018 12:43	
	<a href="#">10240809991</a>	Paperclips and Staples	Paperclips and Staples	TORONTO	15/10/2018 12:07	

## 7.11 Closing (Liquidating) an Employer



Once an employer has been closed:

- an EO Case or a Service Plan can no longer be created for the employer;
- the employer will be excluded (by default) from search results; and,
- no generation of service plan reviews will occur.






An employer cannot be closed if it is associated to an active COJG service plan.

### System Steps

➔ Step 1: Employer Home Page

Click the **Trading Status** tab.

Home Cases Service Plan Cases Contact Administration Alternative IDs History Trading Status Employer Review

Employer Home:   

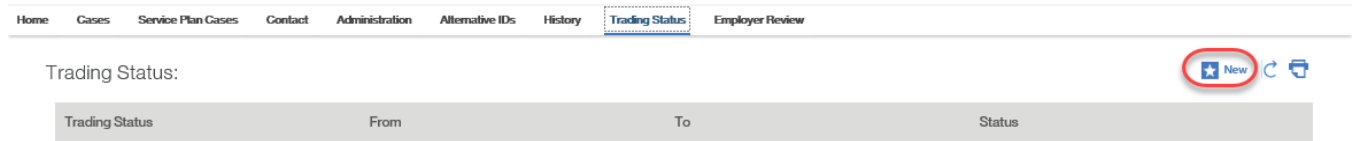
Name

Trading / Business Name	ABC Inc	Registered / Legal Name	ABC Inc.
Business Identification Number	607350454	Preferred Language	English
Registration Date	02/06/2011	Preferred Communication	Phone
Sensitivity	1	Corporate Entity	<a href="#">ABC Inc [Change Corporate Entity]</a>

➔ Step 2: Trading Status Page

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The system uses **Trading Status** to close an employer record. Click NEW to add a **Trading Status** for the employer.



## ➔ Step 3: Create Trading Status Page

To close the employer, the **Trading Status** must have a value of “Liquidated,” the **From** date defaults to the current date, and the **To** date is the date of closure. Click SAVE.

**Create Trading Status:** ✕

---

\* required field

Trading Status \*   
From \*   
To



To (un) Liquidate an employer or to change the status from Liquidated to a different status, you must contact the EOIS Help Desk for further assistance.

## 7.12 Closing (Liquidating) a Corporate Entity

When a Corporate Entity needs to be closed in the system, the trading status must be changed to Liquidated. This system functionality is restricted to the EOIS Help Desk.



Once a corporate entity has been closed:



- employers cannot be associated to it; and,
- the corporate entity will be excluded (by default) from search results.



A corporate entity cannot be closed if it is associated to an active employer (branches).