London Regional Employment Services

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ESCases TRAINING GUIDE

Canada EMPLOYMENT ONTARIO Ontario

(1) CaMS

A Common Assessment (CAT 1 and CAT 2) must be created and uploaded into CaMS prior to entry into ESCases.

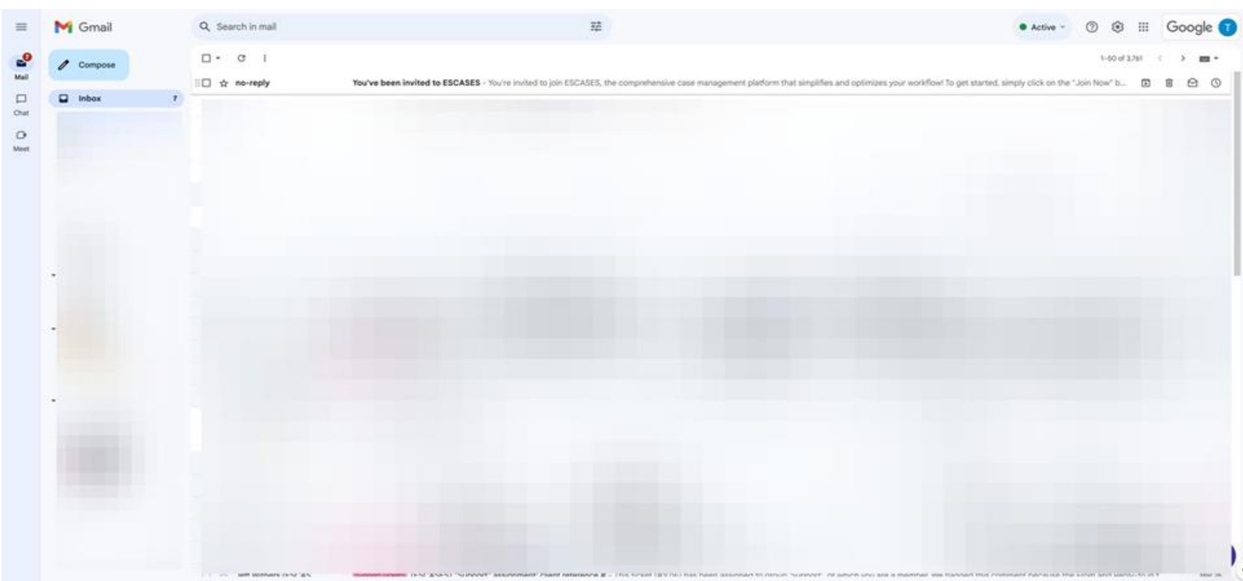
(2) Accessing ESCases

Receiving the Invitation and Activating

An email will be sent to users to register for ESCases.

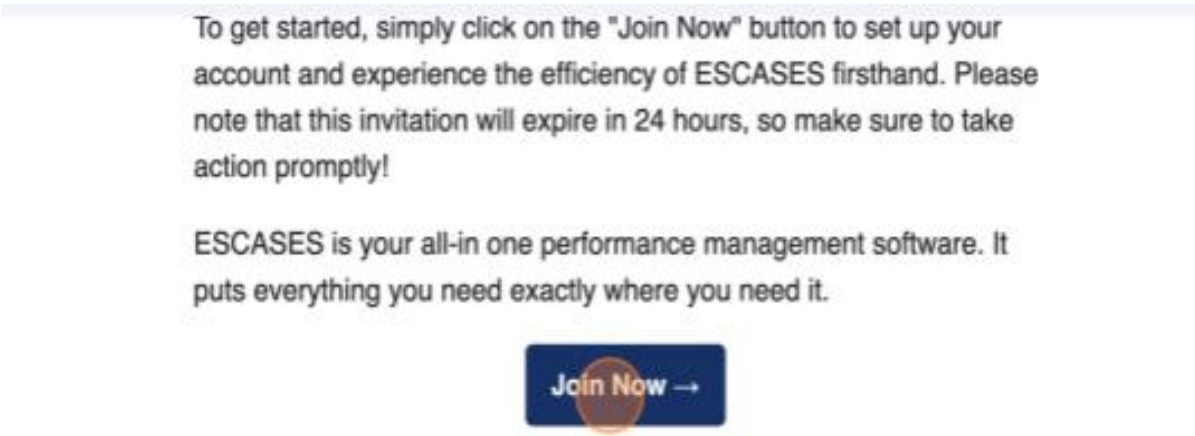
Follow the instructions to register for ESCases that are included for setting up your account.

1. Click on the new email with the subject “You’ve been invited to ESCases”.

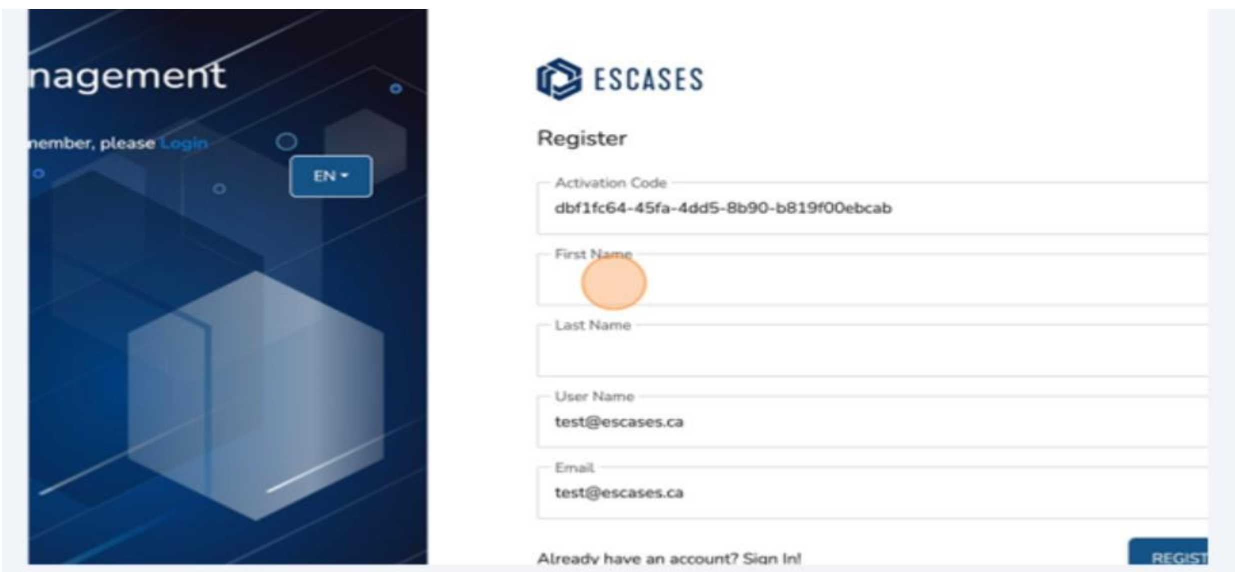


✓ Note: The invitation to ESCases will expire after 24 hours. Ensure to open the invitation and register for ESCases prior to the link expiring.

1. Click “Join Now.”

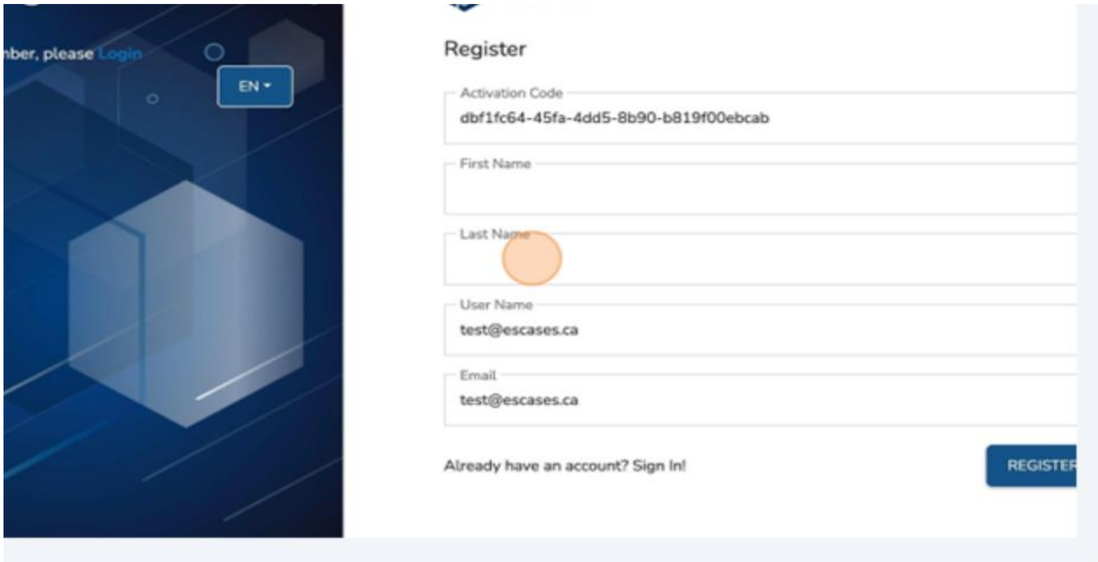


2. Click the “First Name” field.



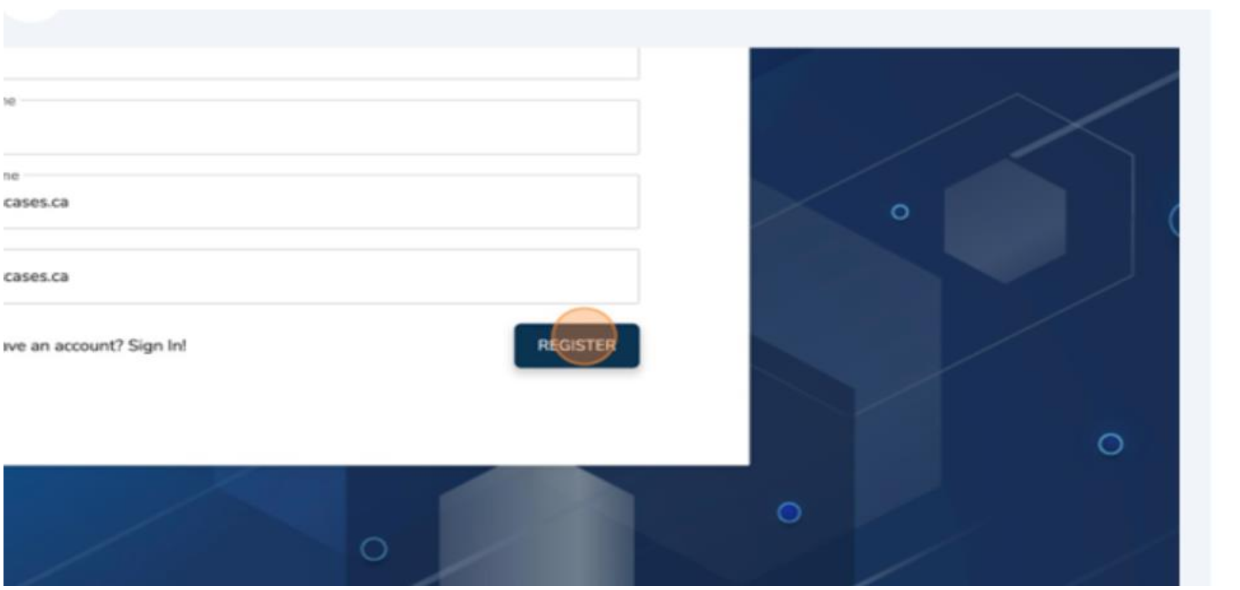
3. Enter your “First Name” field.

4. Click the “Last Name” field.



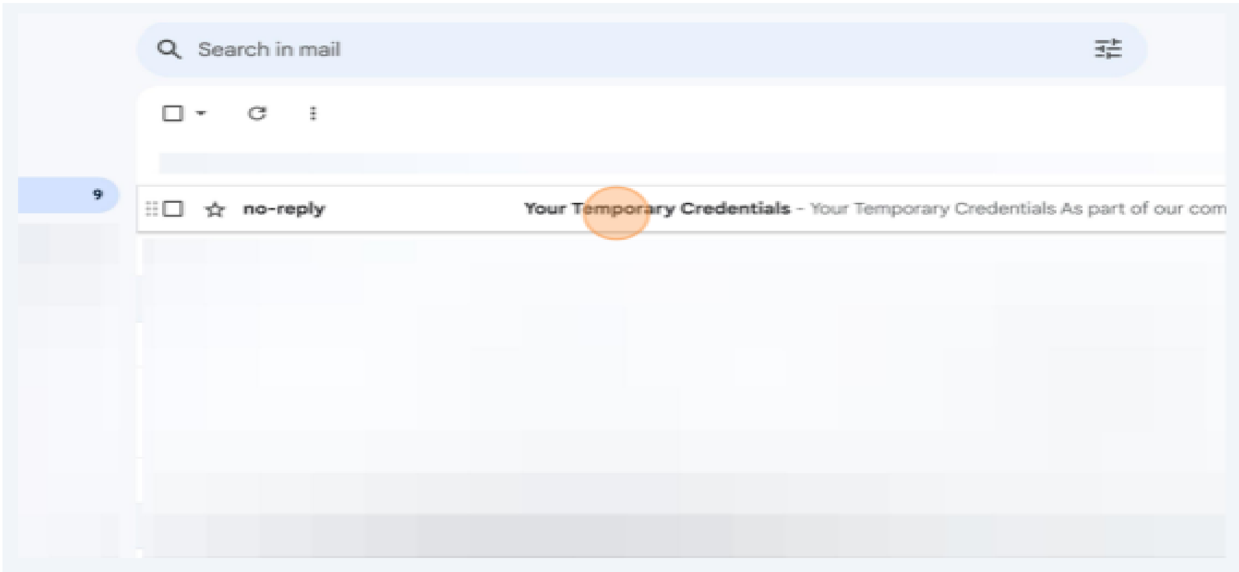
5. Enter your last name.

6. Click “Register.”

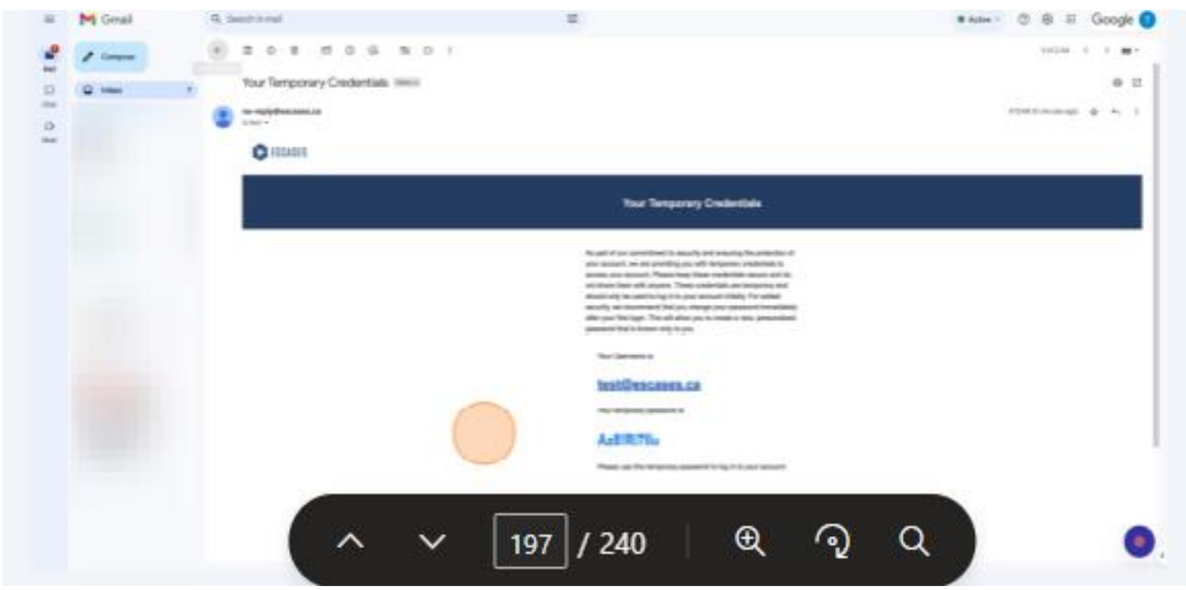


✓ Note: A temporary password will be emailed to you. Copy your temporary password.

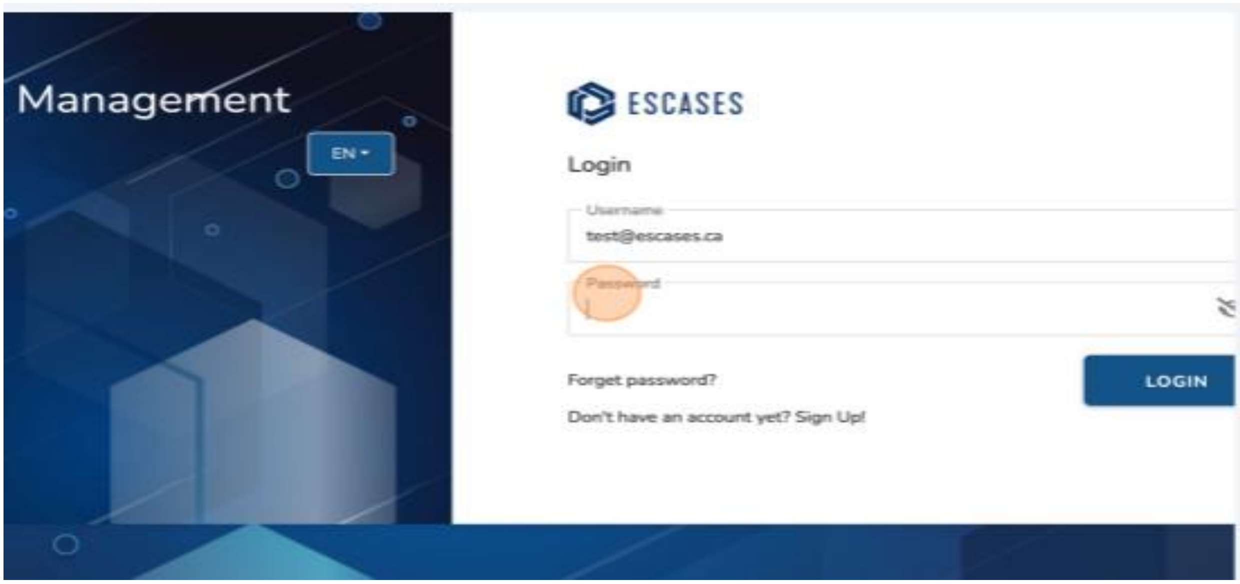
7. Click the email with your temporary credentials.



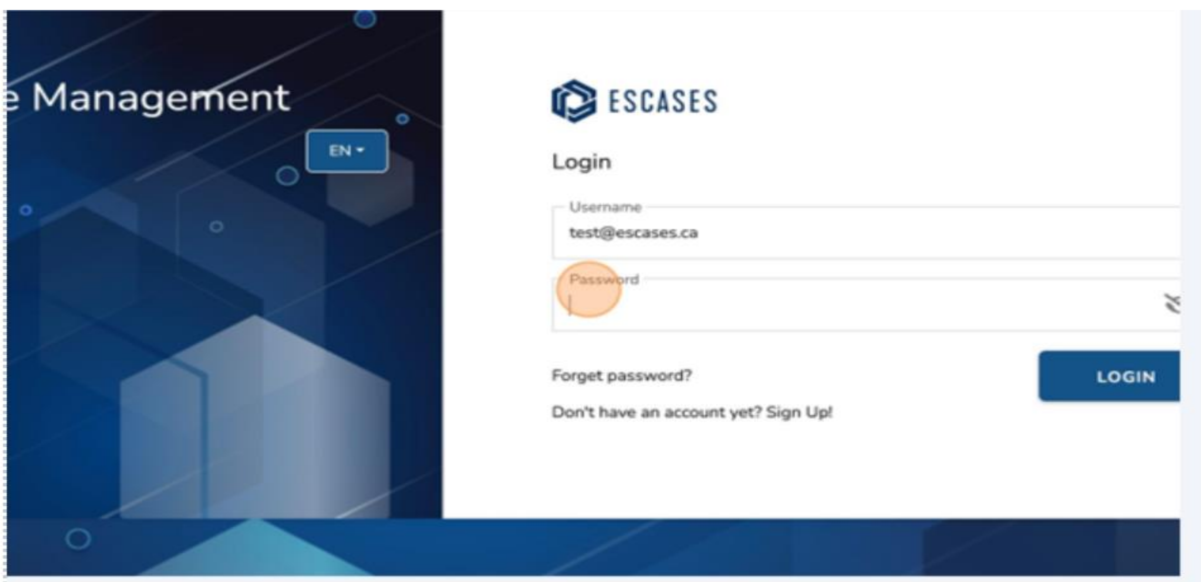
8. Copy your temporary Password.



9. Paste your temporary password in the “Password” field.



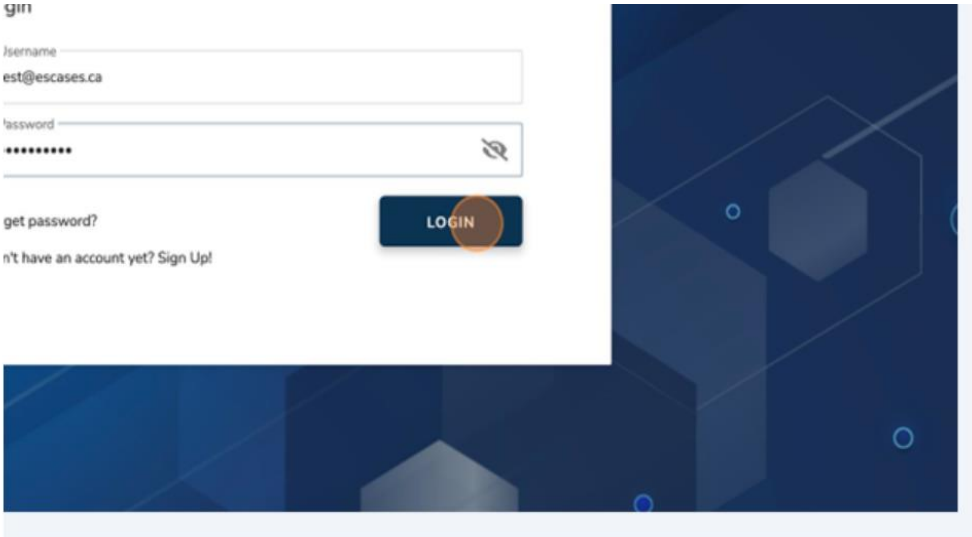
10. Click “Login.”



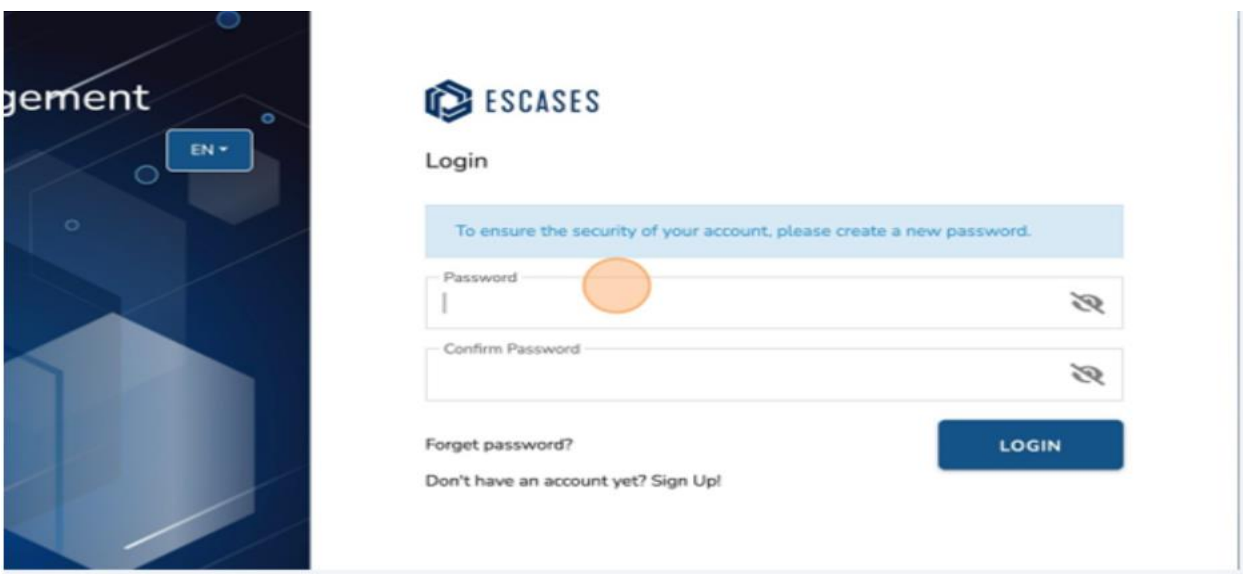
❖ Tip! For consistency purposes, we recommend using your email as your username.

11. Click the email with the subject “Your temporary credentials.”

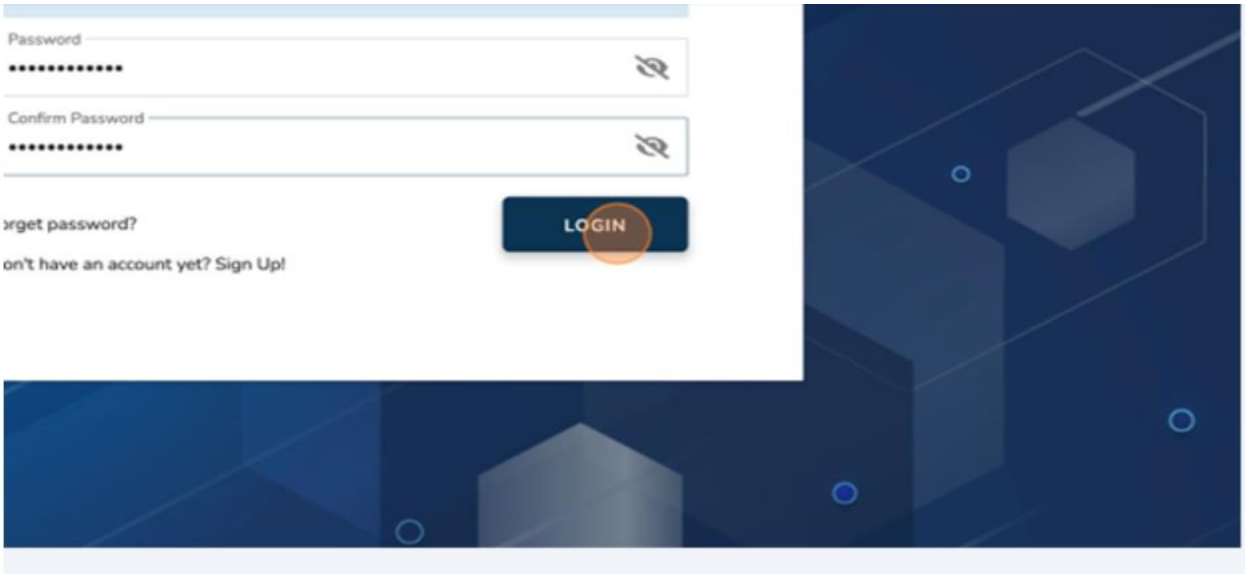
12. Click “Login.”



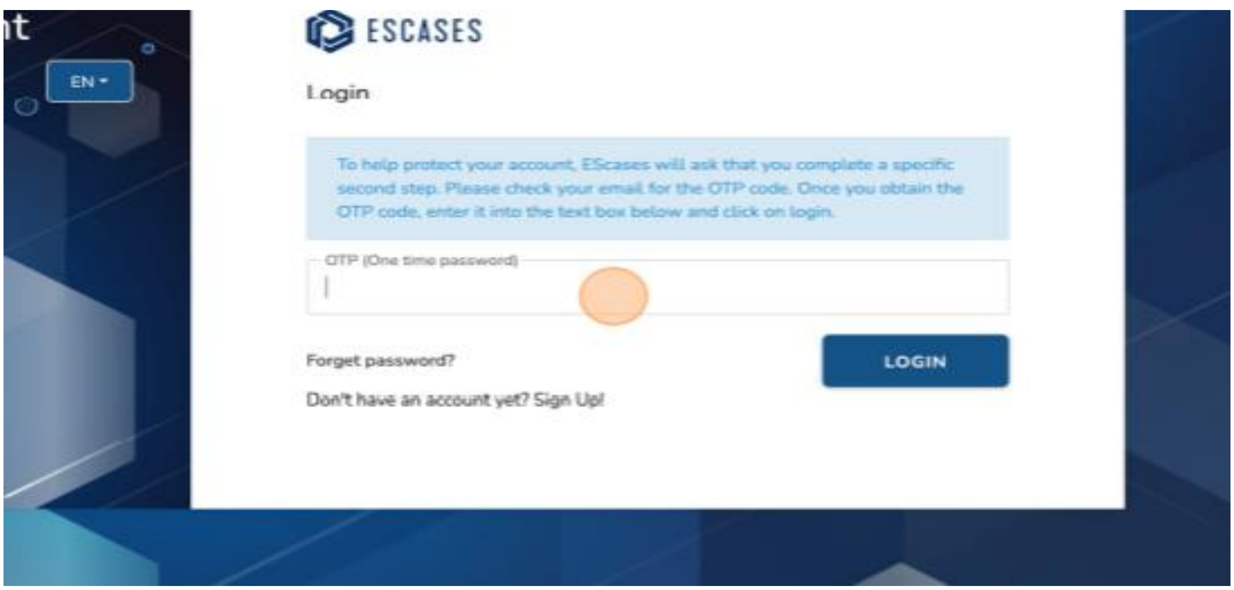
13. Enter a new password in the “Password” and “Confirm Password” fields.



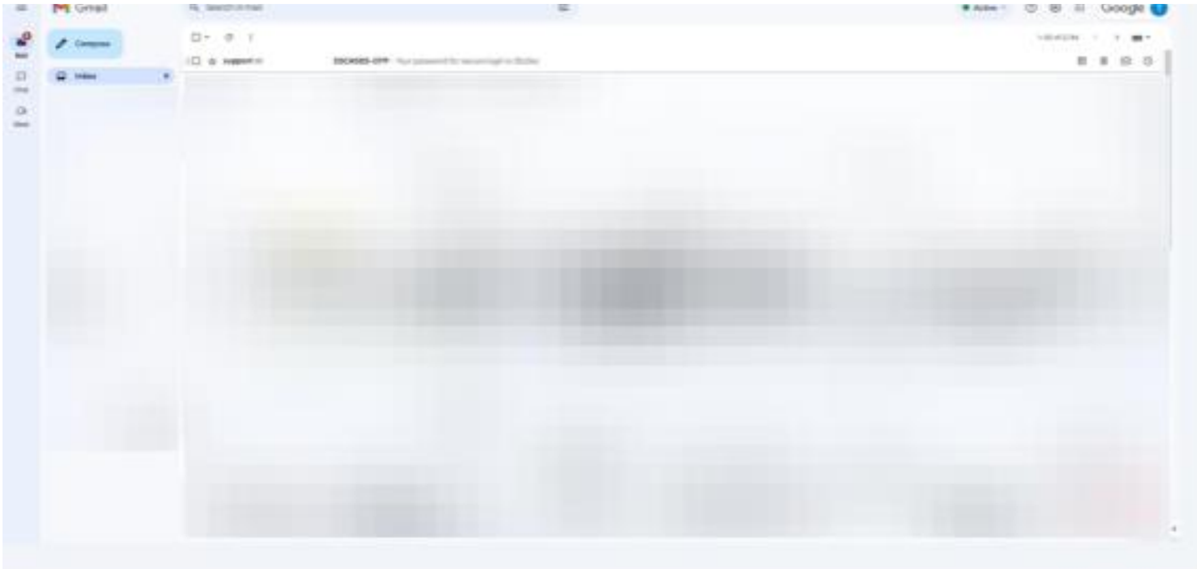
14. Click “Login.”



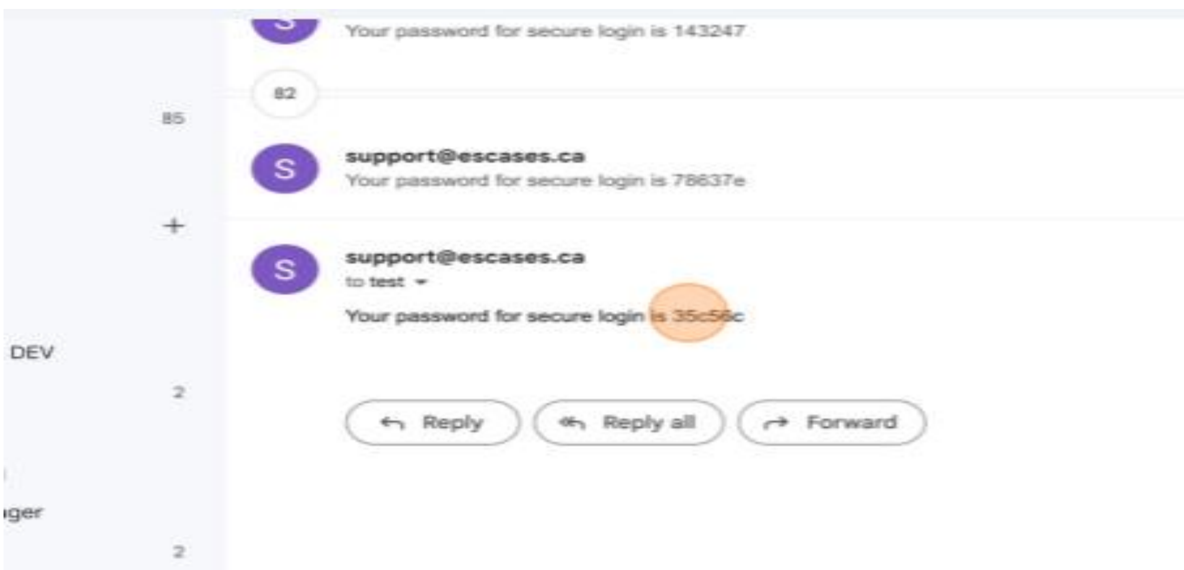
You will be asked for your OTP-One Time password sent to your email.



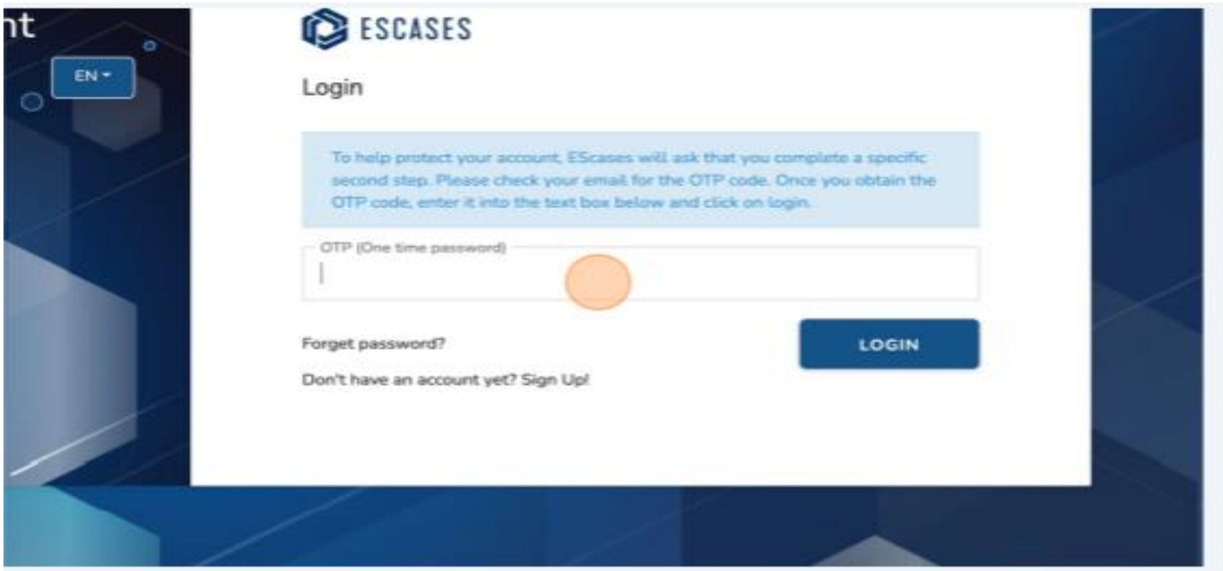
15. Click on the OTP email with the subject "ESCASES-OTP."



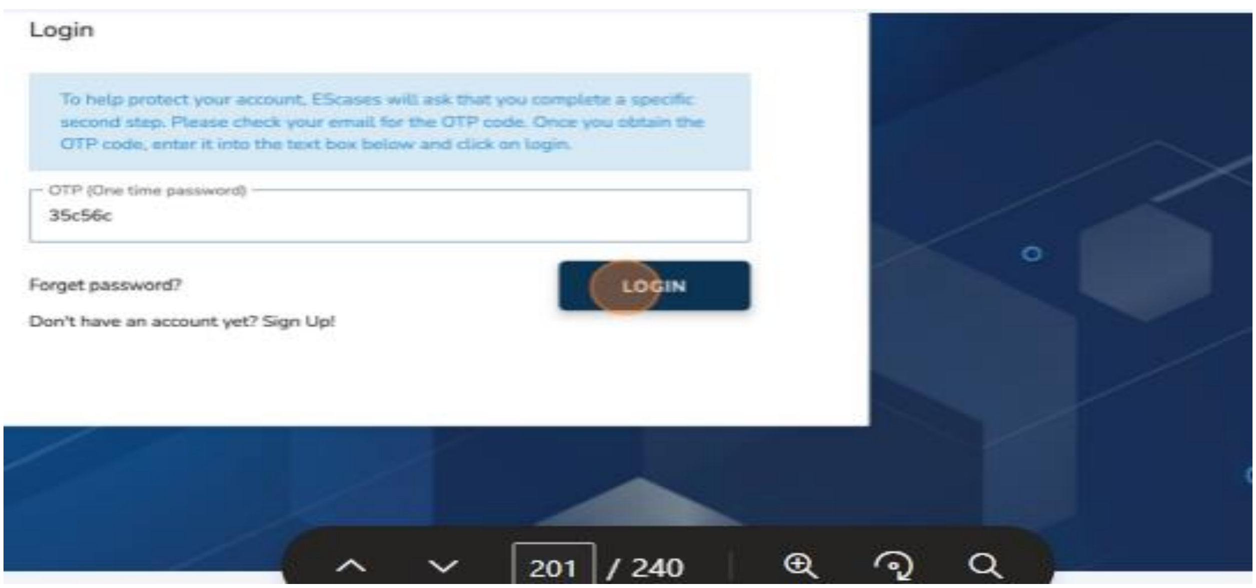
16. Copy the OTP.



17. Paste the OTP.



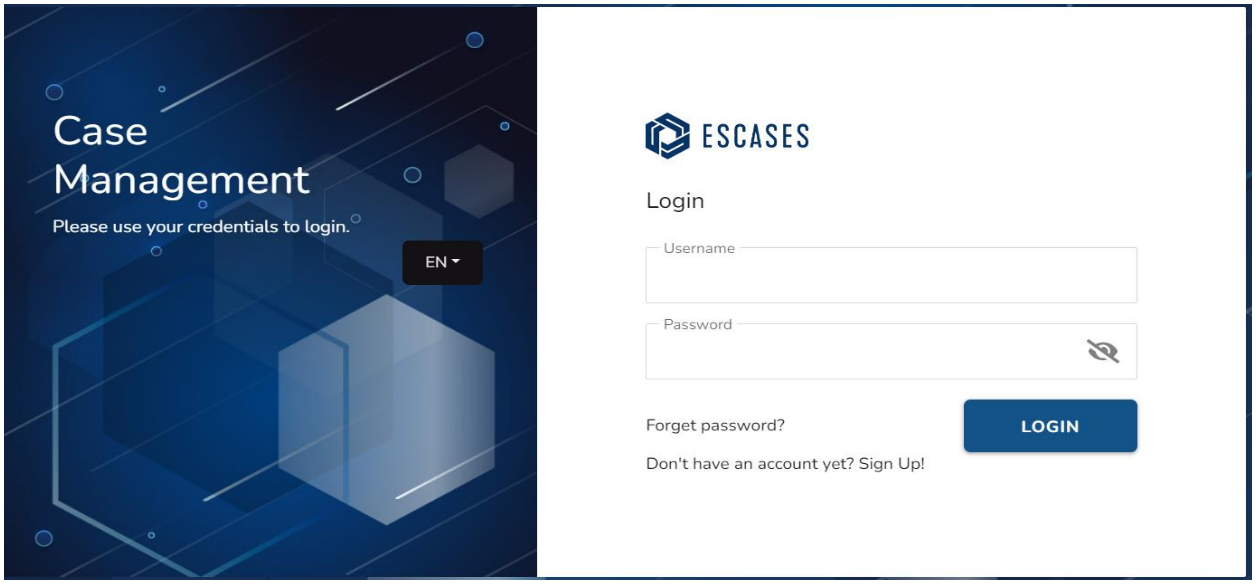
18. Click "Login."



ESCases First Login

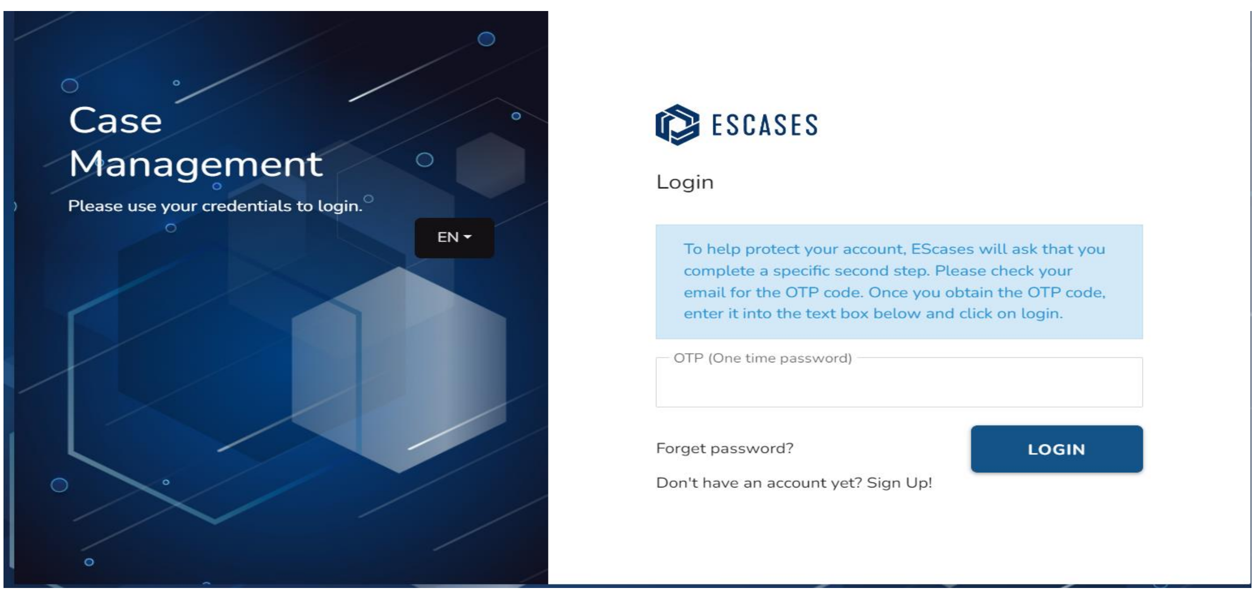
To Log into ESCases, complete the following steps:

1. Enter Your Username i.e., the email address that was used to create the ESCases account.
2. Enter your Password.



A one-time password will be emailed to you.

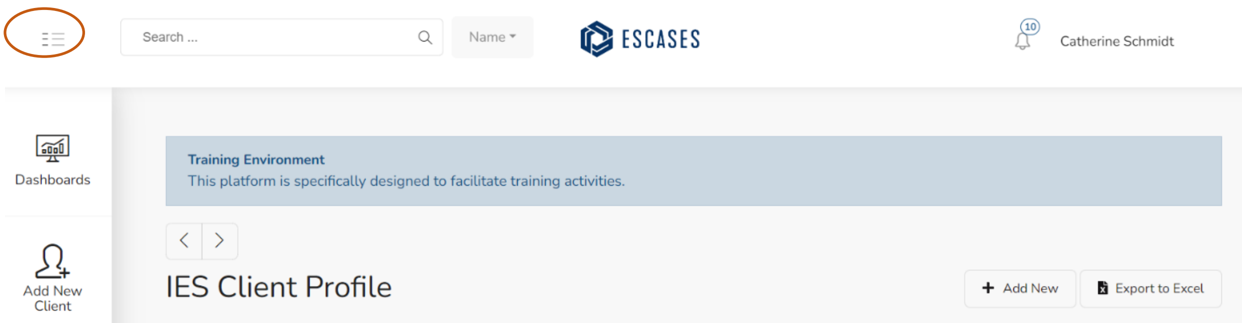
3. Enter the one-time password sent to your email account.
4. Click "Login."



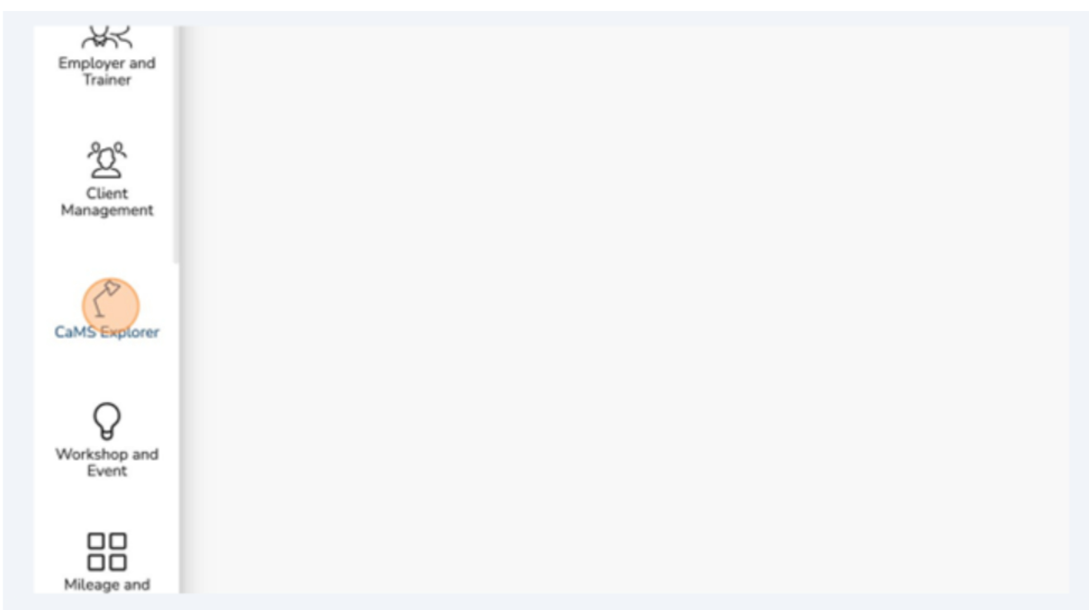
(3) CaMS Explorer

✓ CaMS Explorer is one of the primary tools to help users what is happening in the CaMS environment while also working within ESCases – all without logging into CaMS!

1. To open the left navigation, click on the three lines at the top left of the page.



2. Select the CaMS Explorer from the left navigation menu.



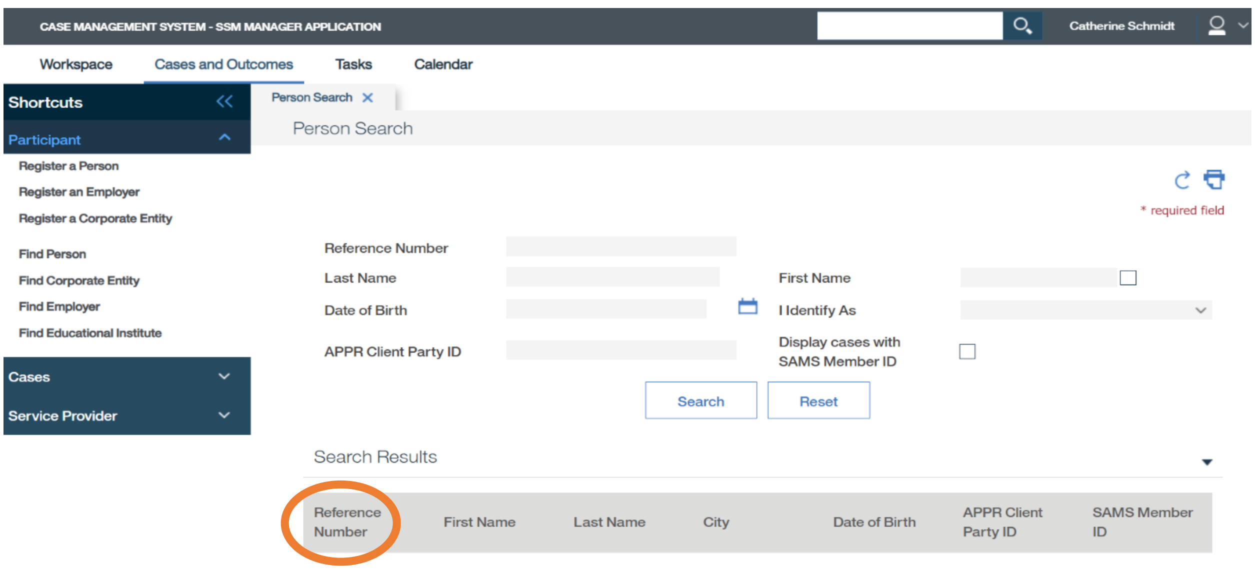
❖ Tip! Opening CaMS Explorer in a new tab on your browser can help in switching your view easily between a client profile and CaMS.

CaMS Reference Number

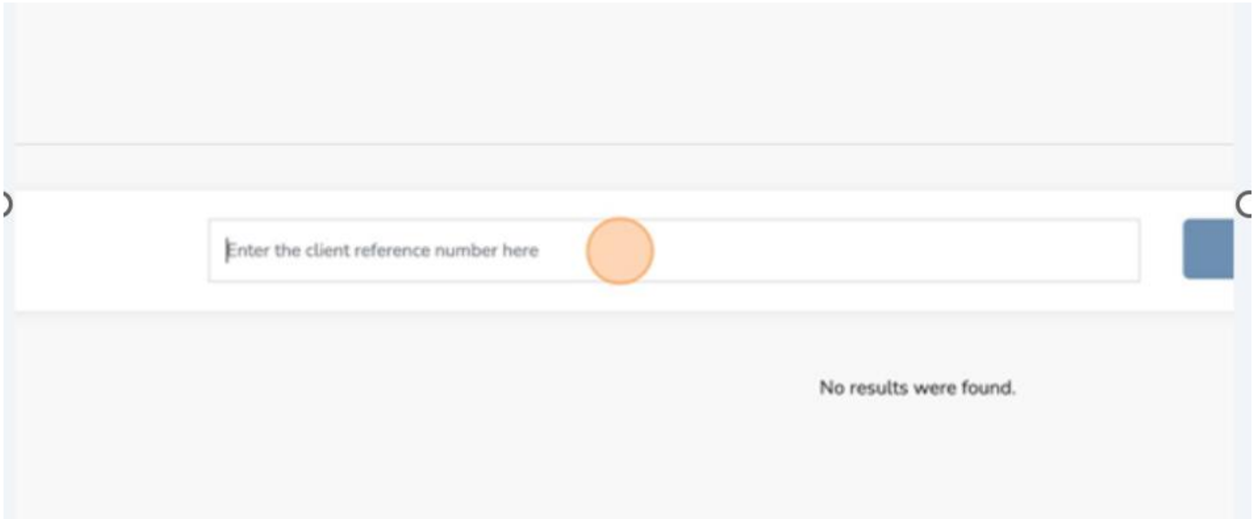
To link CaMS to ESCases, the common assessment Module 1 and Module 2 must be completed and submitted to CaMS.

The Person Reference Number will be used to link ESCases and CaMS. To locate the Person Reference Number:

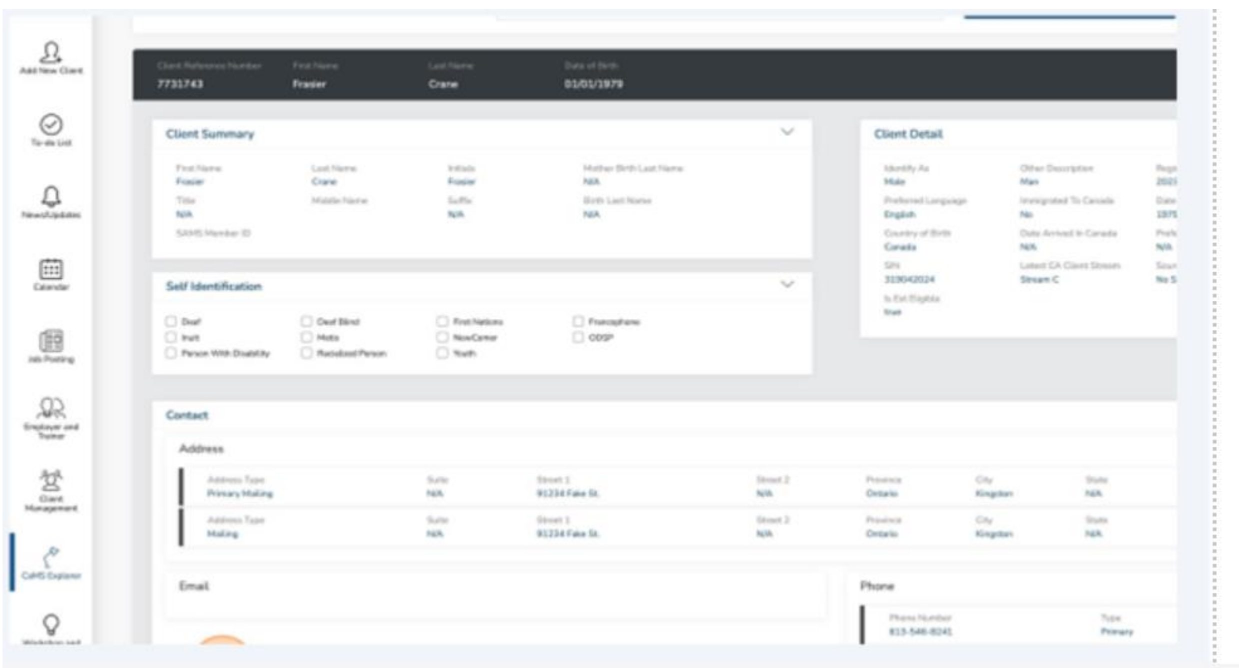
- Log into CaMS.
- Go to “Cases and outcome.”
- Under “Short Cuts” click on “Find Person.”
- The “Person Seach” page opens.
- Enter the “First Name” and “Last Name” of the client.
- The “Search Results” will be displayed.
- Copy or write down the client reference number that appears in the “Search Results”.



3. Click the ”Enter the client reference number here” field and insert the Client Reference Number from CaMS.



4. Click ”Find Client”.



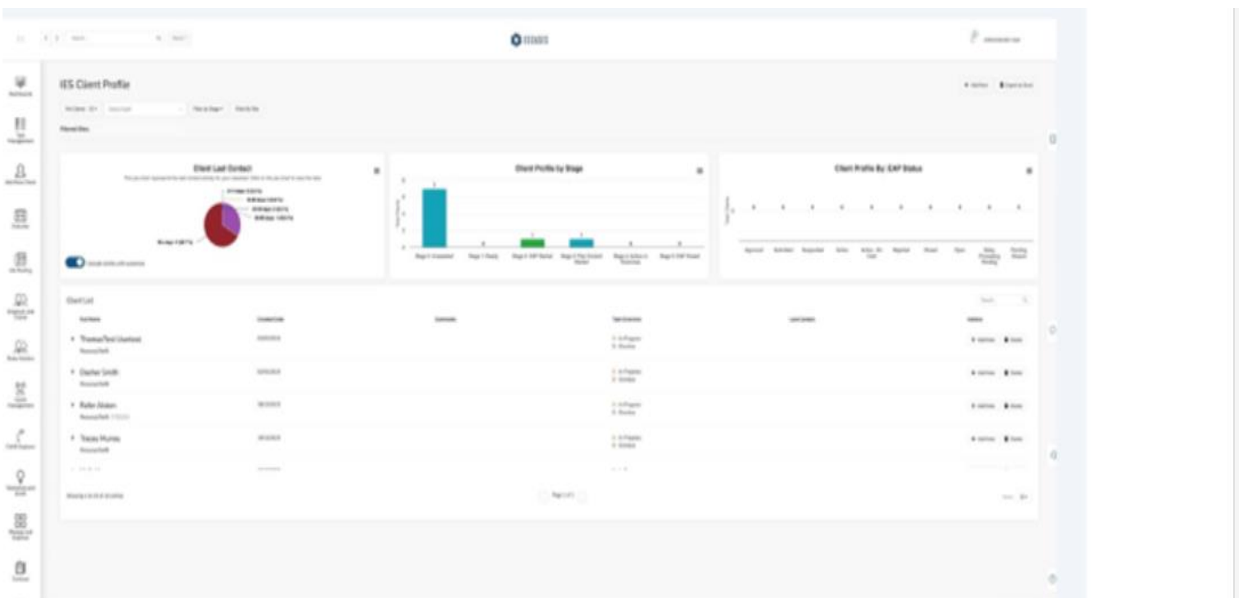
✓ You can now view the client profile based on the information in CaMS. Remember that this view allows you to see what's been synced into CaMS from ESCases in real-time.

(4) Add New Client

ESCases has streamlined the process for onboarding a new client. Whether the client is Self-Directed or Case-Managed, new clients are entered into ESCases in the exact same way.

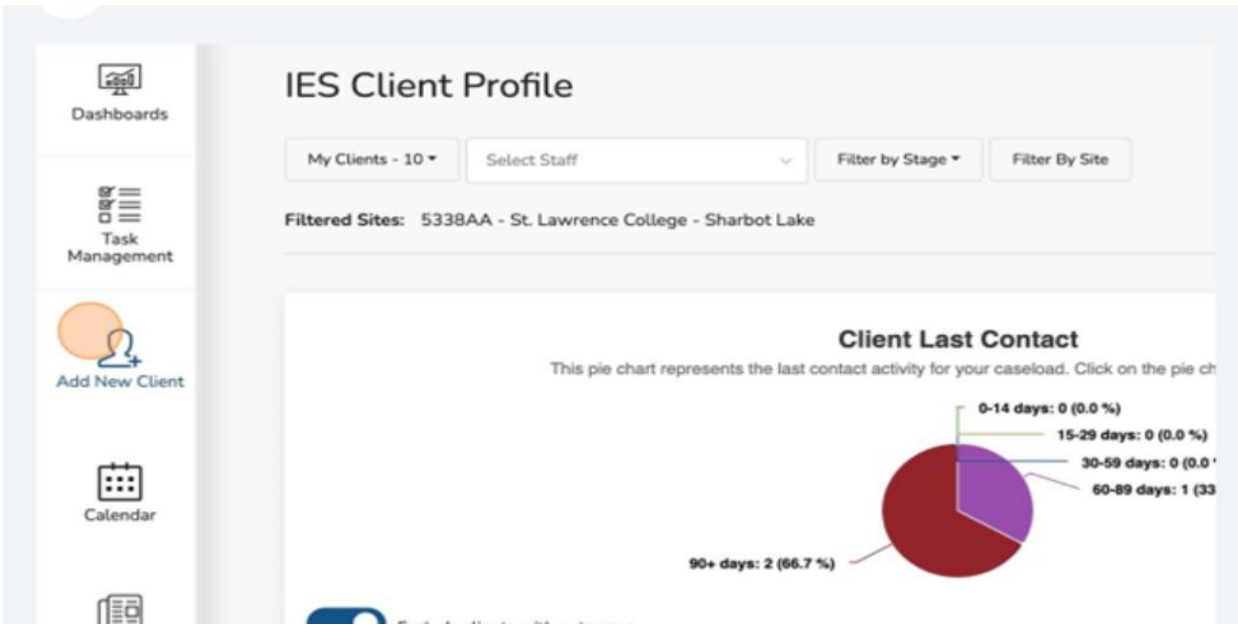
- ✓ Note: Only Case-Managed clients will be entered into ESCases at this time.

1. From the ESCases screen, navigate to the left menu and locate “Add New Client.”

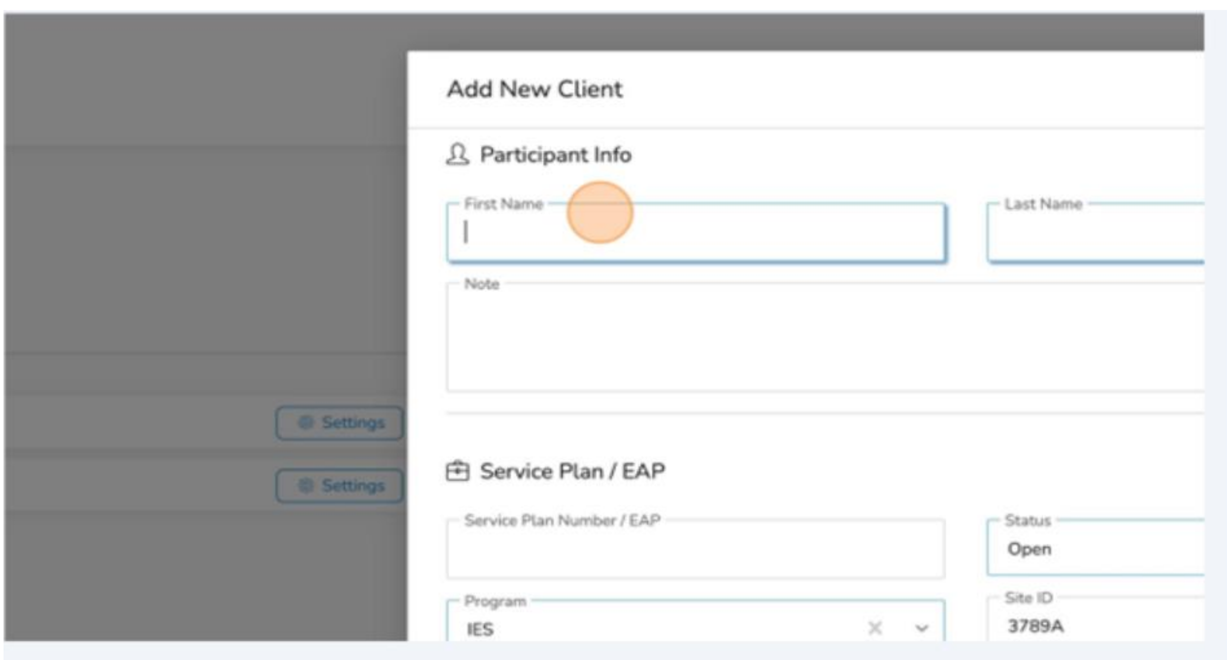


2. Click “Add New Client.”

The “Add New Client” page displays.

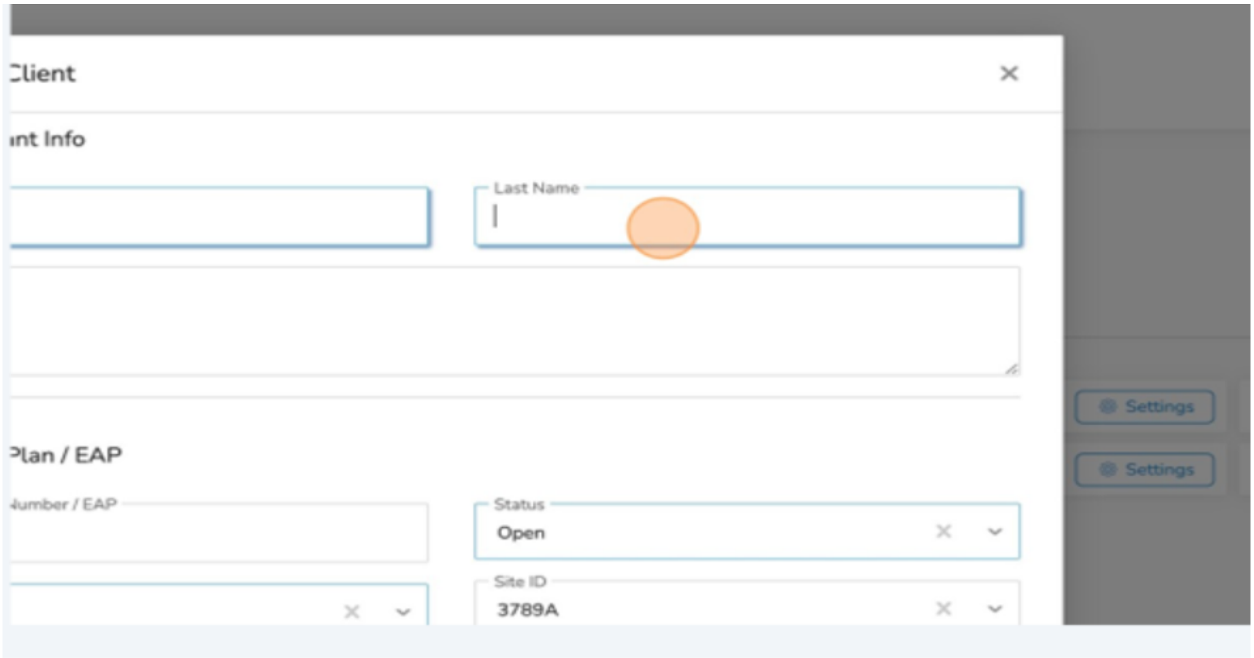


3. Click “First Name.”



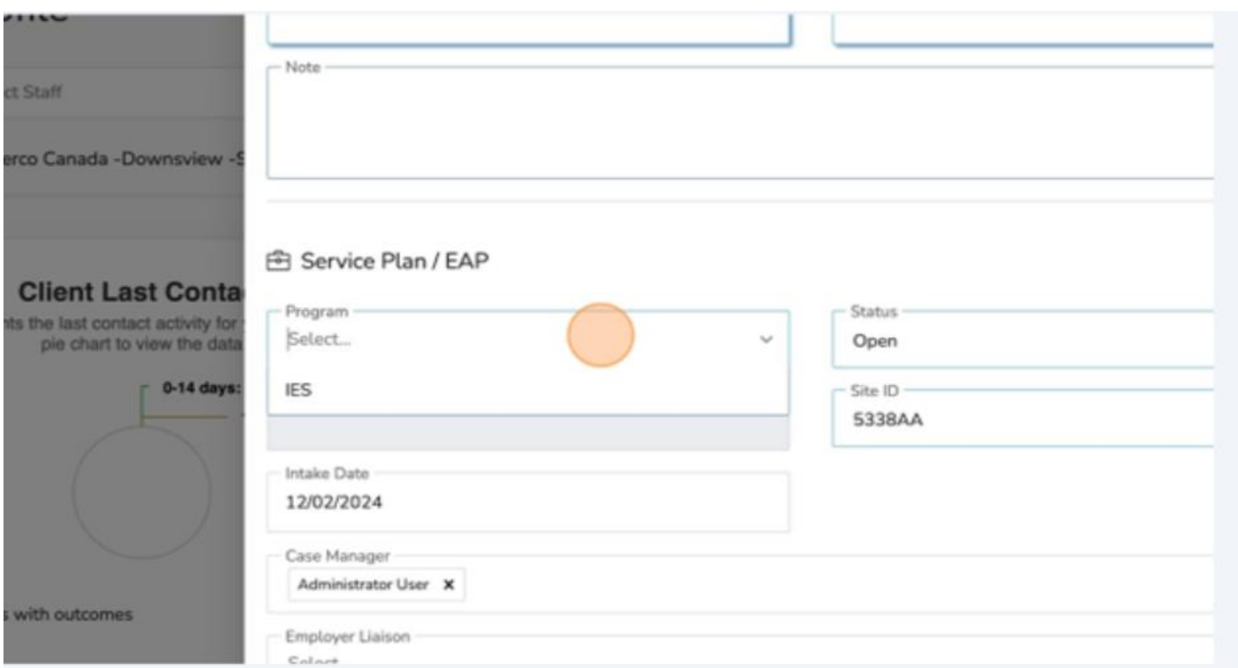
4. Enter the client’s First Name.

5. Click “Last Name.”

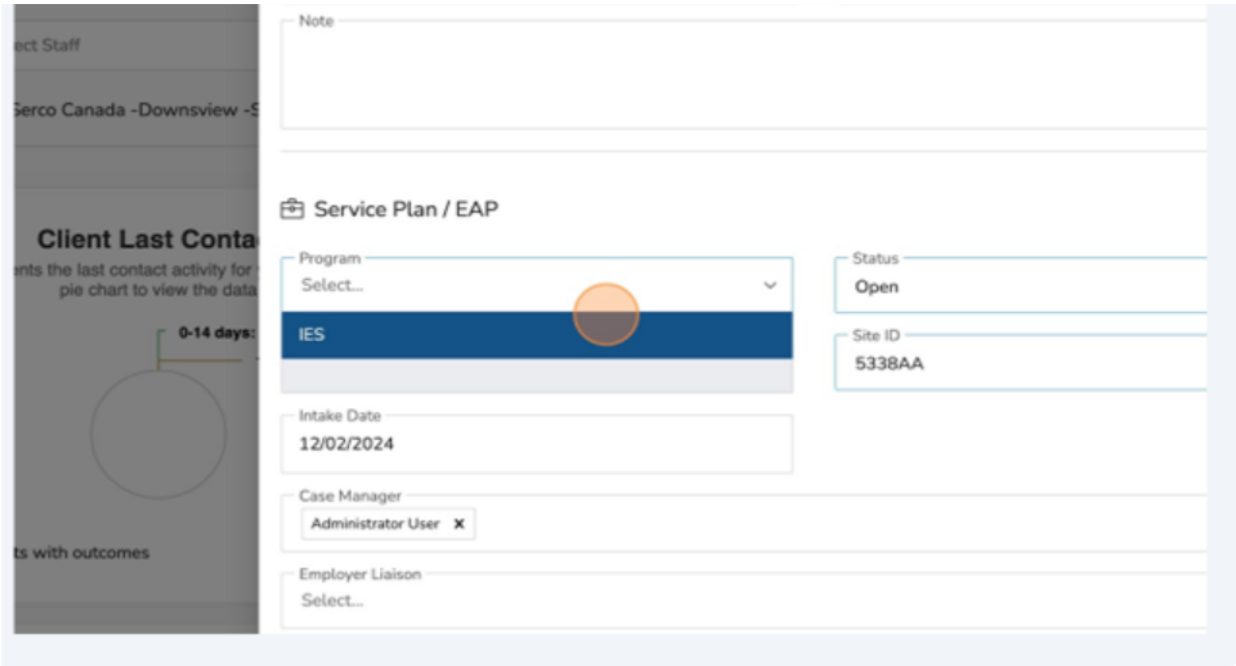


6. Enter the client’s last Name.

7. Click the “Service Plan/EAP.”

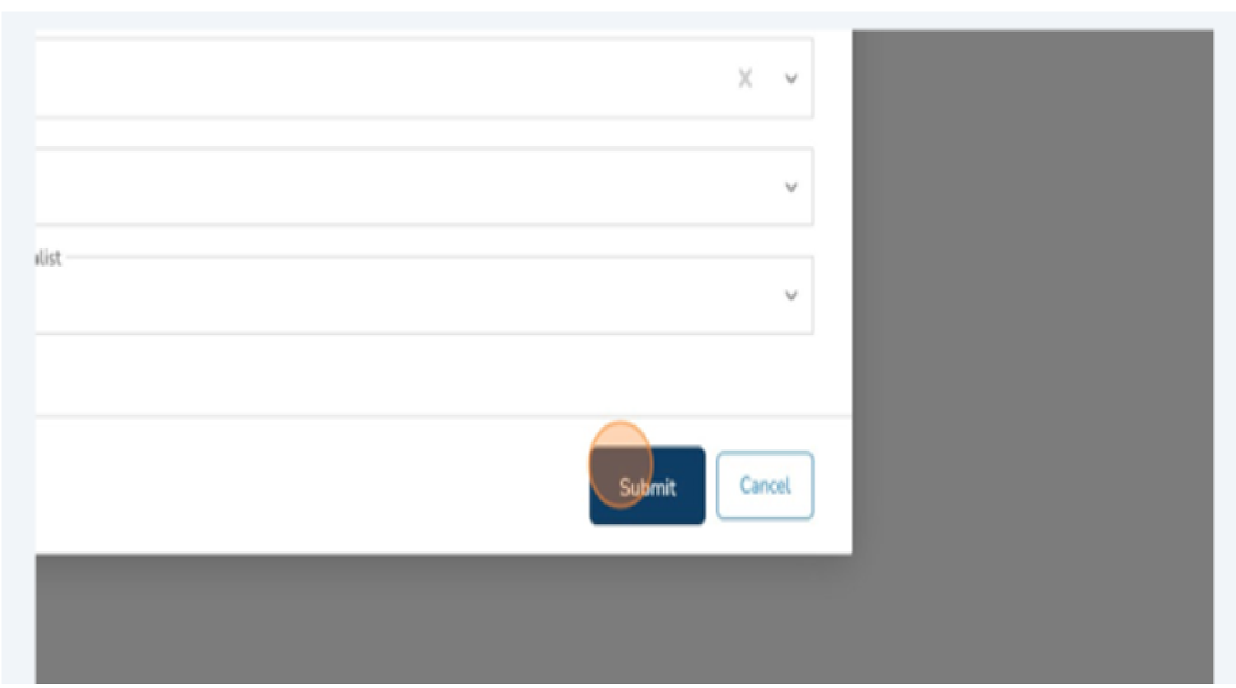


8. Select “IES.”

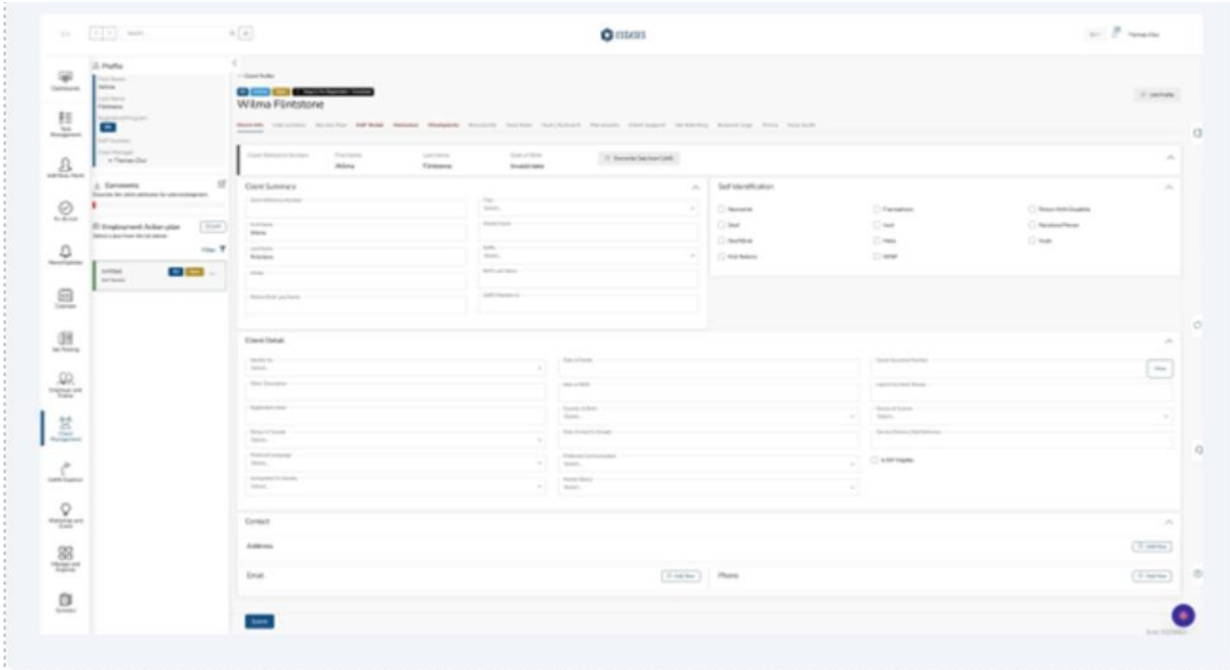


❖ Tip: Leave the "Status" option as open. The "Site ID" field can also be left with the default value as the system will auto-populate with your Site ID.

9. Select “Submit.”



You have successfully added a new client profile.



(5) Navigation

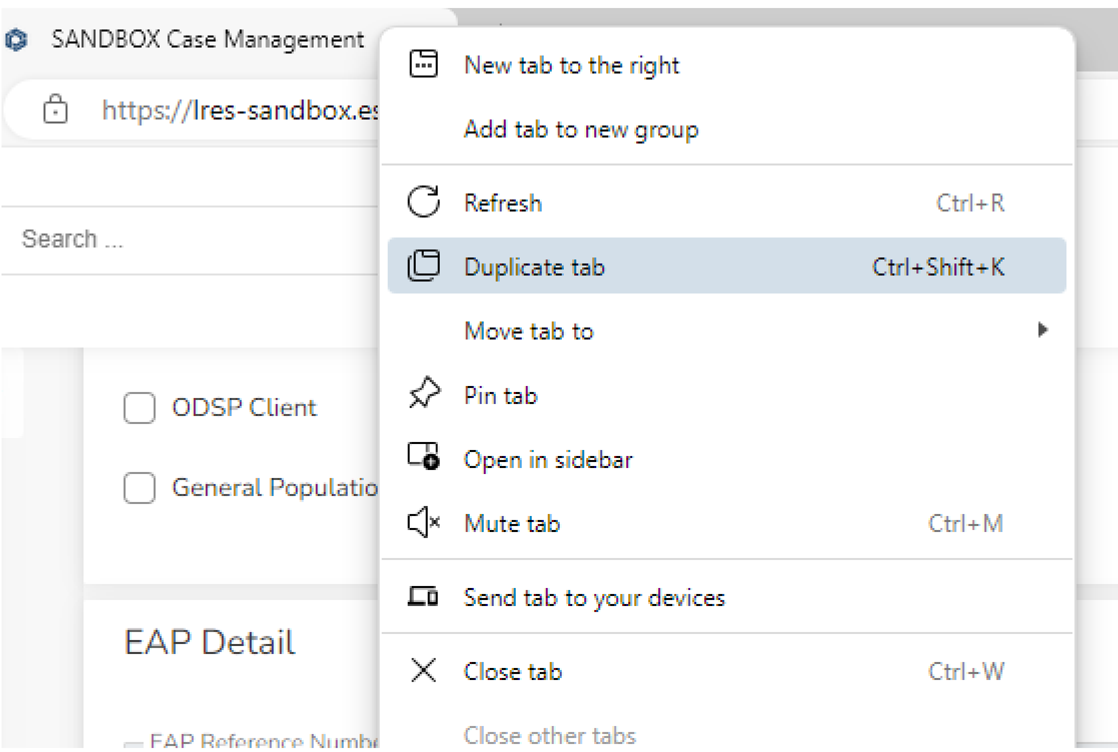
Duplicate Tabs

ESCases allows a user to open multiple tabs in order to continue working when ESCases is syncing with CaMS.

To duplicate a tab:

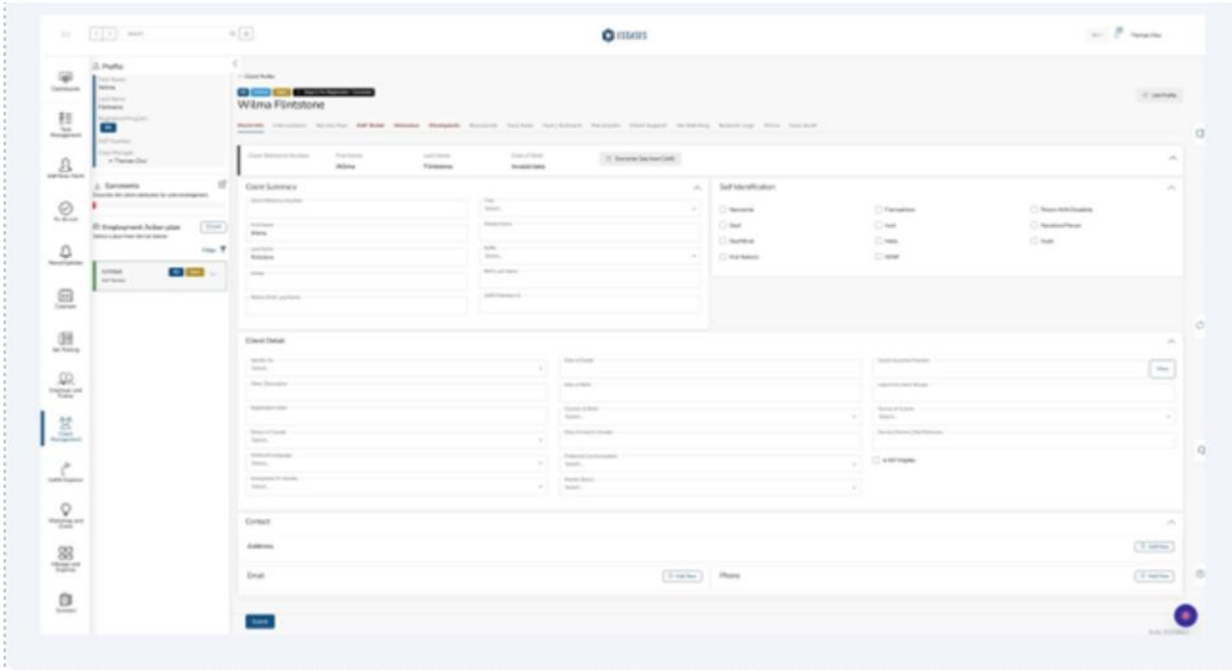
1. Right click on the “Sandbox Case Management” tab.
2. Select “Duplicate tab.”

A second tab will open. Users can duplicate as many tabs as required.



- ✓ The user can also copy the link and paste it in another tab.

Tab colour



Red tabs – sync with CaMS.

- Selecting “Submit” will upload and save information in CaMS and ESCases.
- Information will not save in ESCases if CaMS upload does not take place.

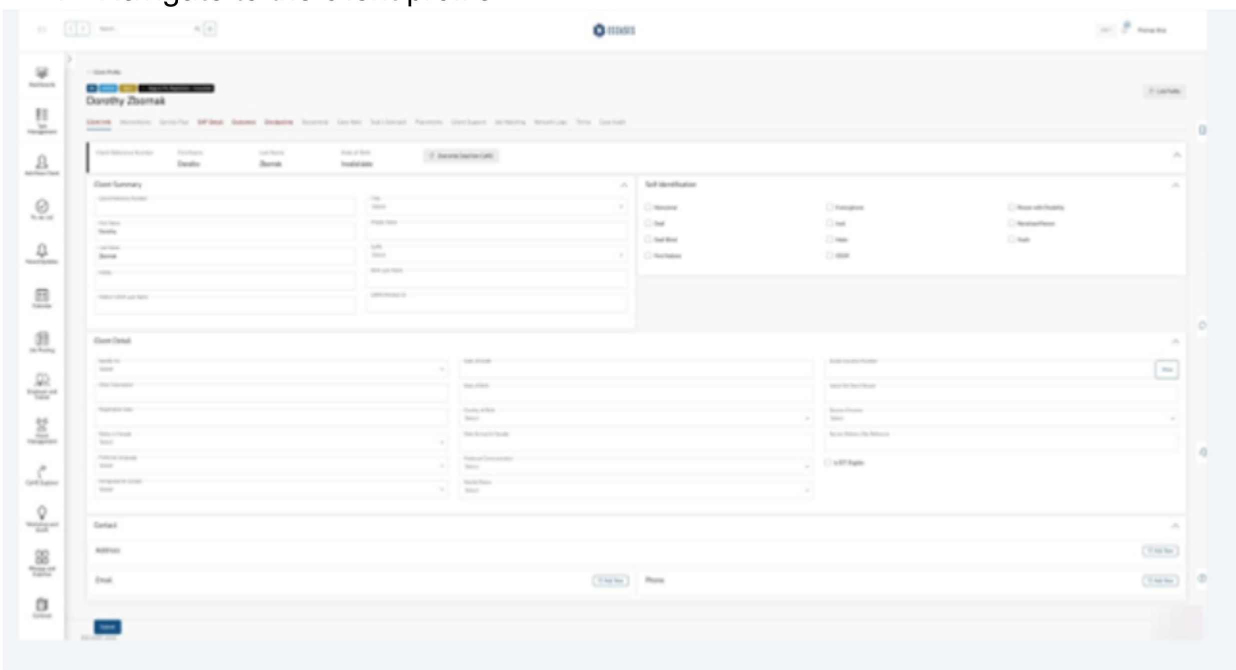
Grey tabs - do not sync with CaMS.

- Selecting “Submit” will save information in ESCases only.

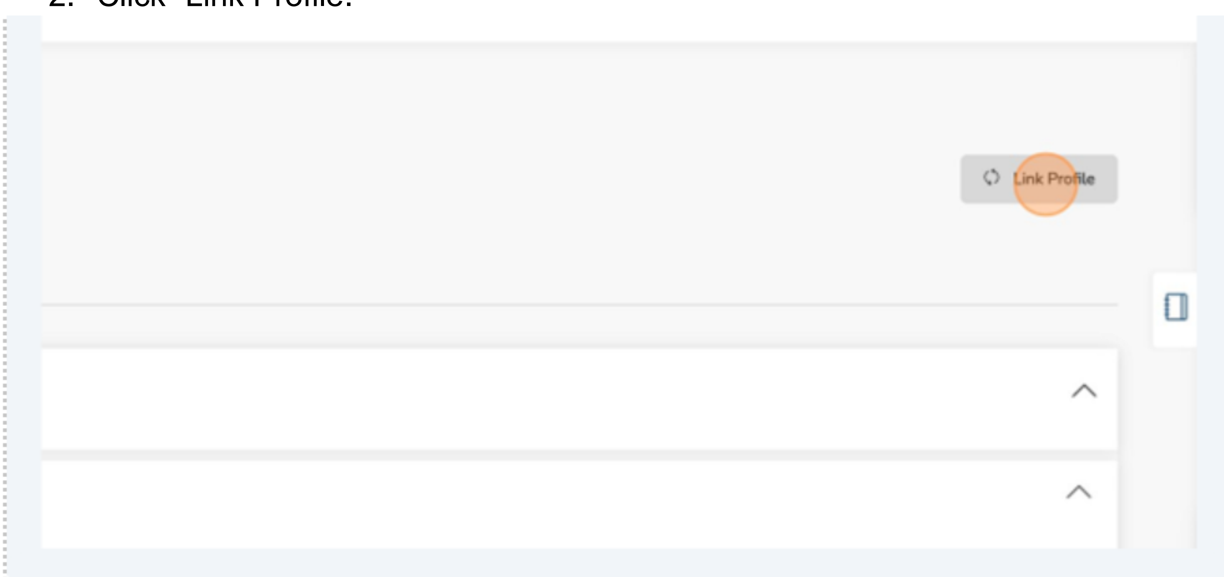
(6) Linking a Client Profile with CaMS

Linking is the most critical step in ensuring your client profile is in sync with CaMS. Linking is typically done after a Common Assessment has been completed and the client has been assigned a Client Reference Number in CaMS (Person Reference Number).

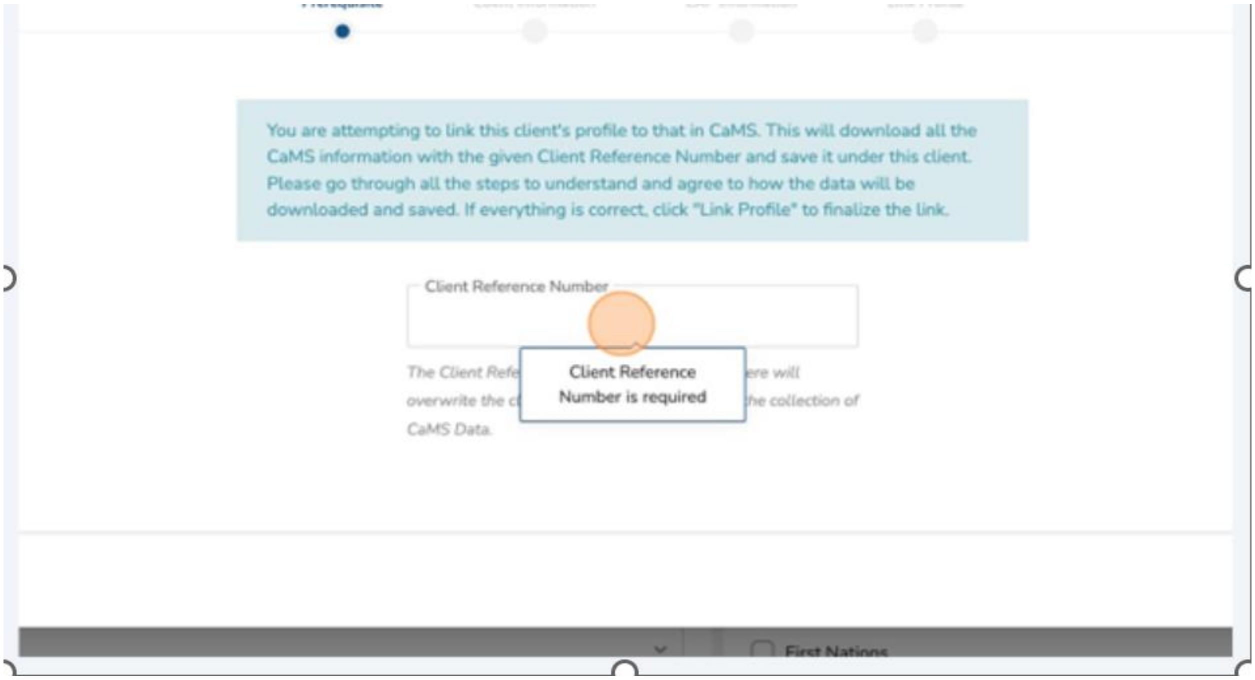
1. Navigate to the client profile.



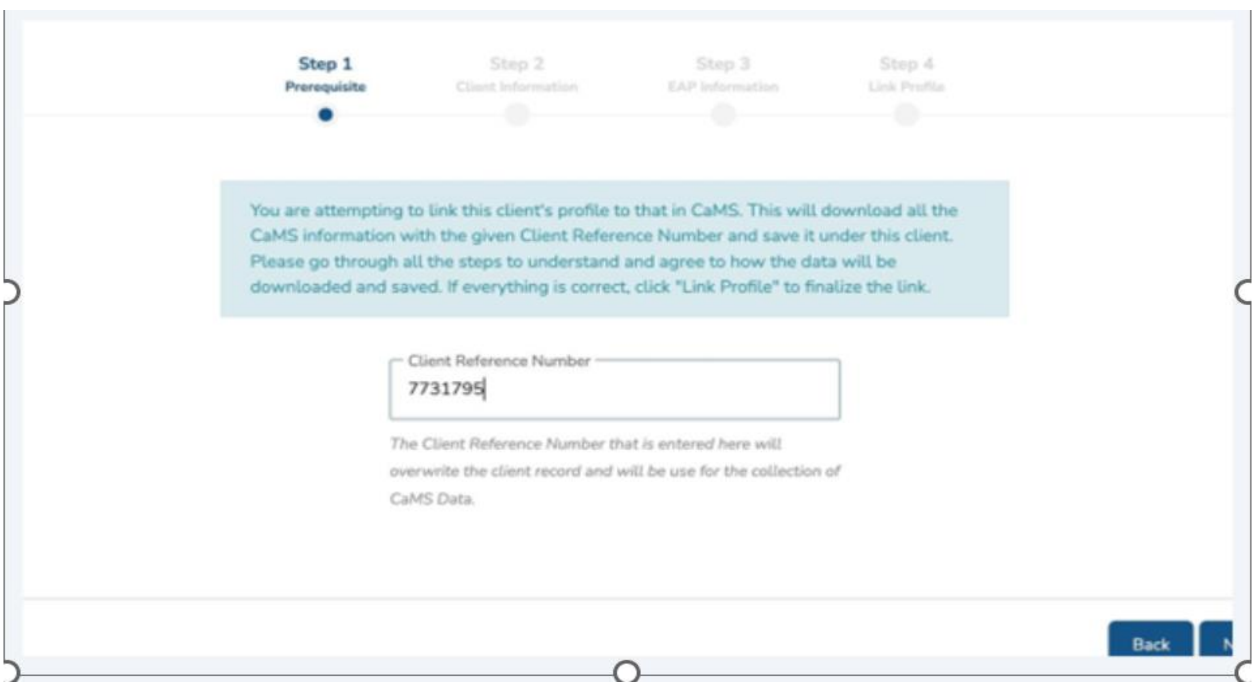
2. Click “Link Profile.”



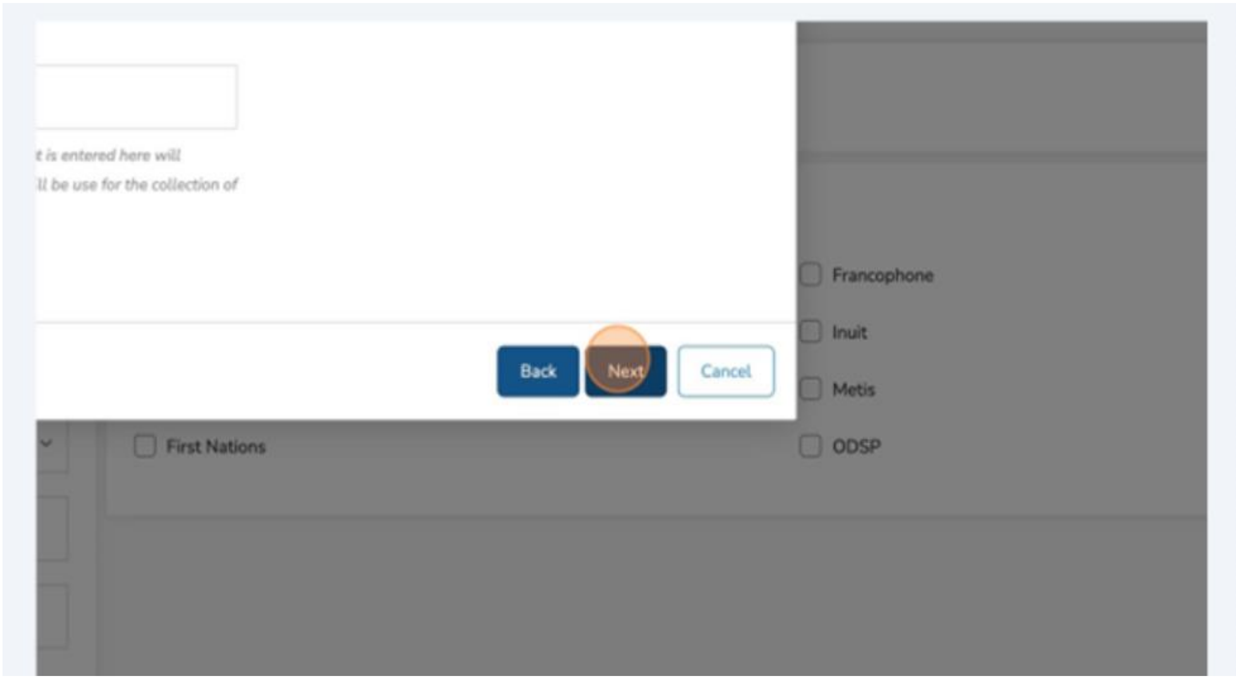
3. Click the ”Client Reference Number” field.



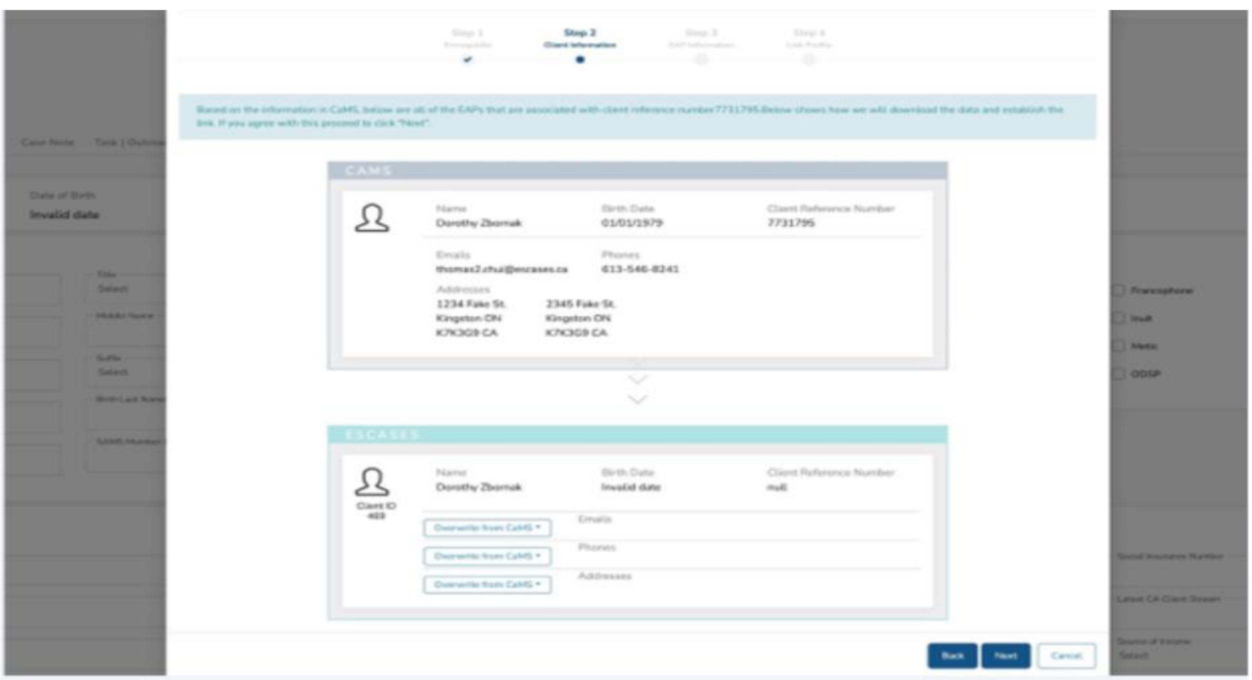
4. Insert the “Client Reference Number” from CaMS.



5. Click “Next.”



6. Select which data to download from CaMS.

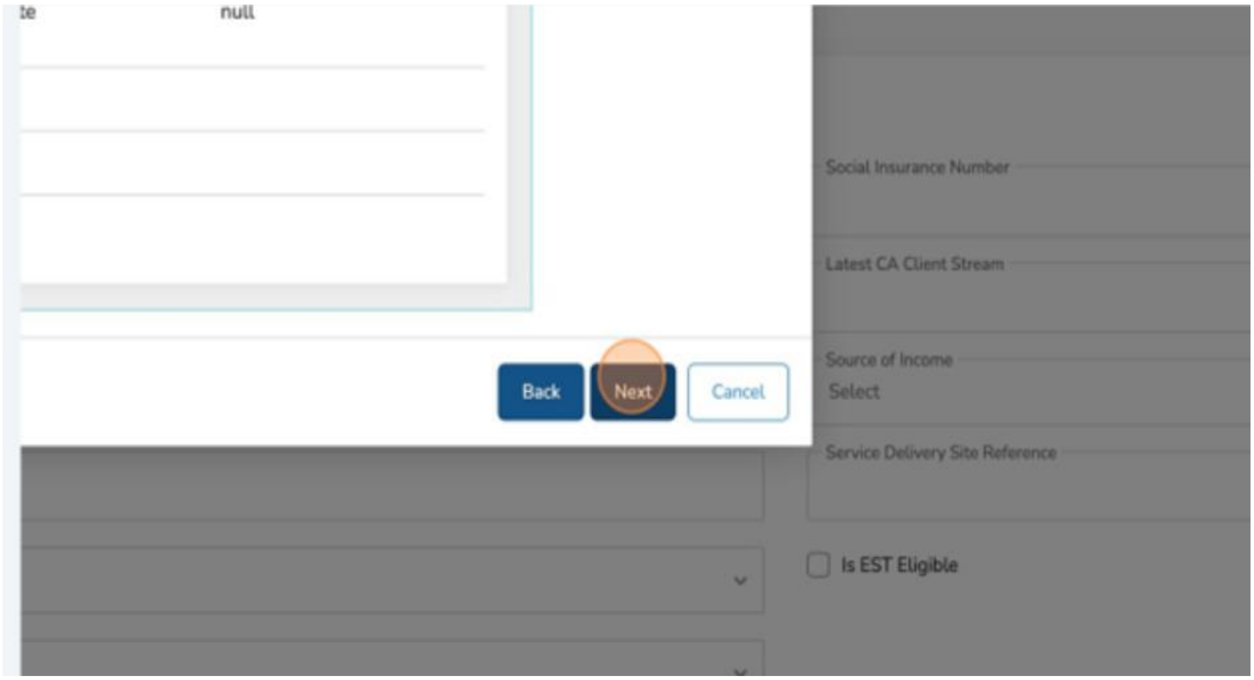


❖ Note: By default, all client profile items from CaMS will be downloaded into ESCases.

✓ ALERT! If you do not want to overwrite the data you already have in ESCases, please be sure to make the appropriate selection:

- Overwrite from CaMS, or
- Keep current.

7. Click “Next.”

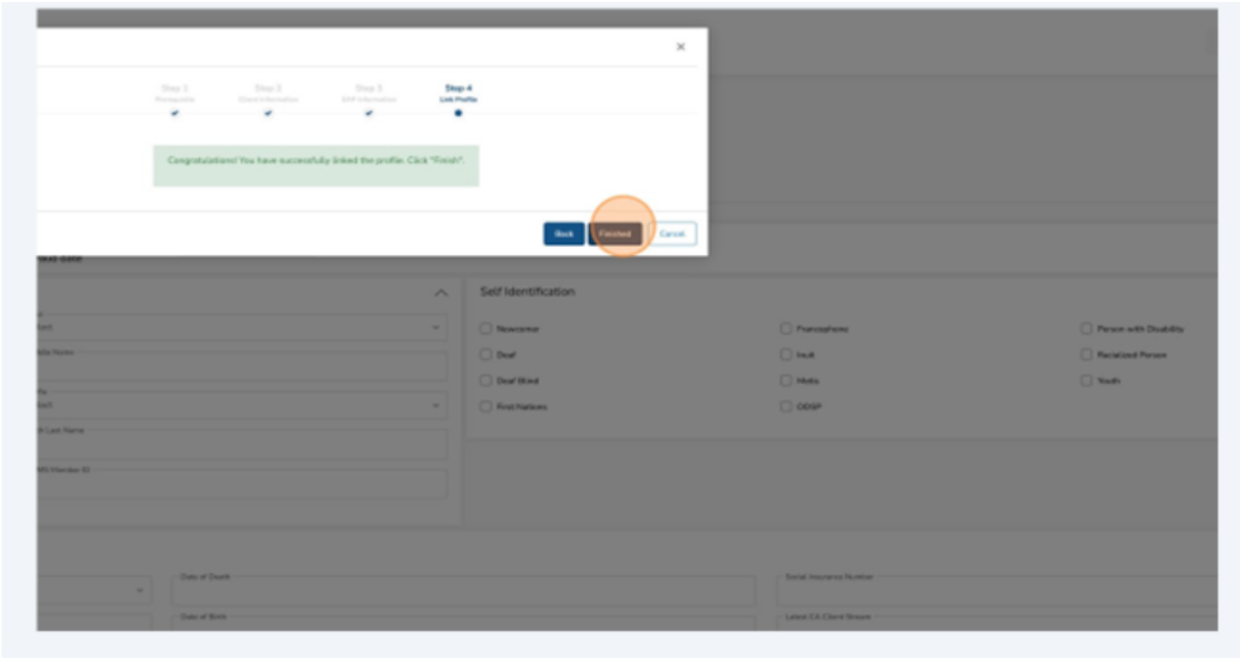


Review the EAP Details

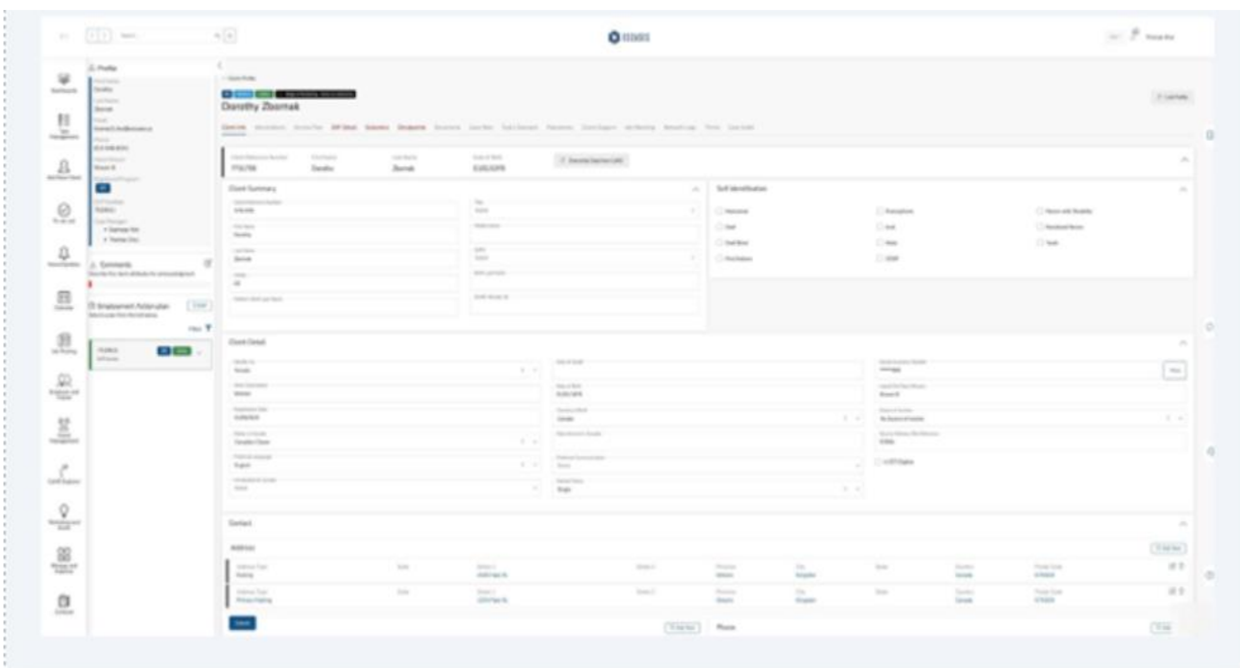
- ALERT! The next phase of linking a profile with CaMS addresses all EAPs found in CaMS - this includes closed and active EAPs.
- By default, any active EAP found in CaMS will overwrite any active IES EAP found in ESCases (case notes are still retained from ESCases when such an overwrite takes place).
- Ministry guidelines are such that only 1 active EAP for an IES client can exist at any given time.

Please wait while the sync takes place. The following message will display: “Congratulations! You have successfully linked the profile”.

8. Click "Finished."



9. You have now successfully linked a client profile with CaMS.



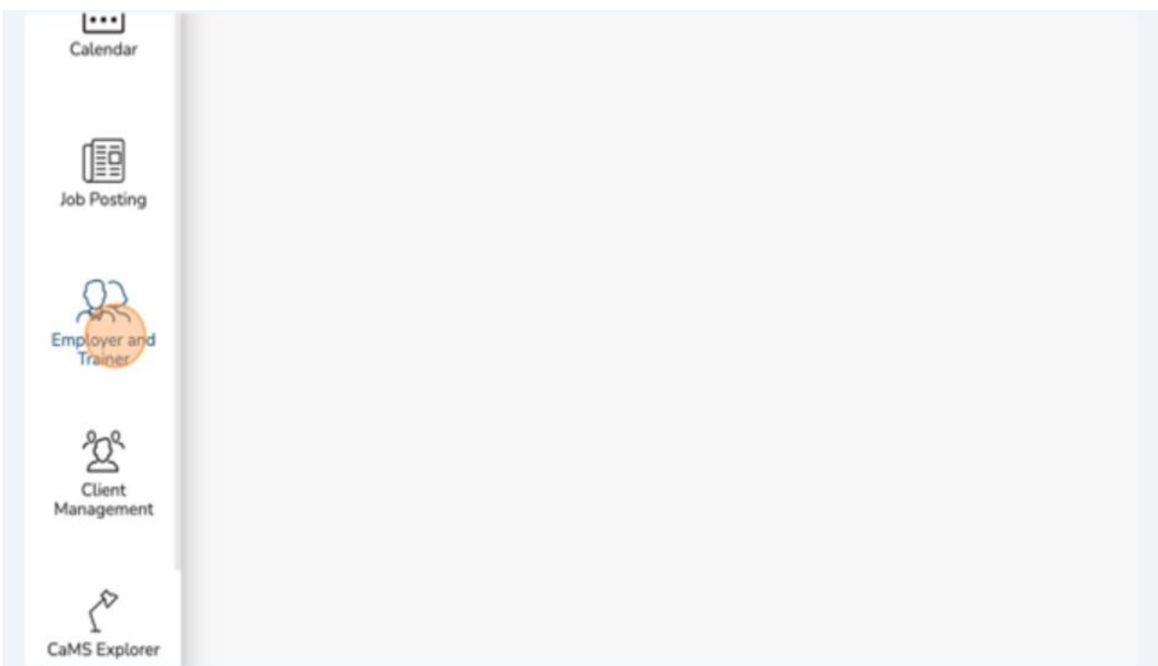
(7) Add a New Employer

- Alert! The Employer details must be first entered in CaMS. ESCases can only retrieve Employer details from CaMS. Current Ministry API for Employers is one-way only. Creating an employer in ESCases will not upload Employer details to CaMS.

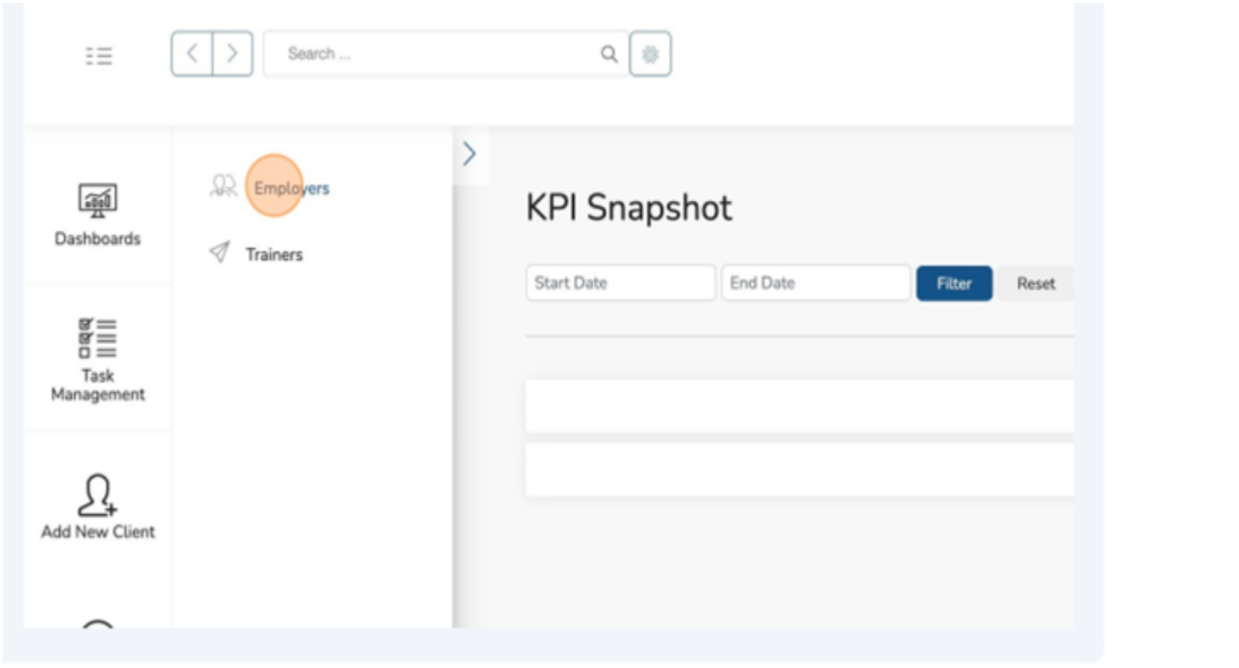
- Alert! A new version of this is currently being developed but is not yet available. It is anticipated that full two-way syncing will be implemented in Q2 of 2024

- ✓ Note: Section “Linking an Employer in CaMS” will document the steps to find the employer reference number in CaMS.

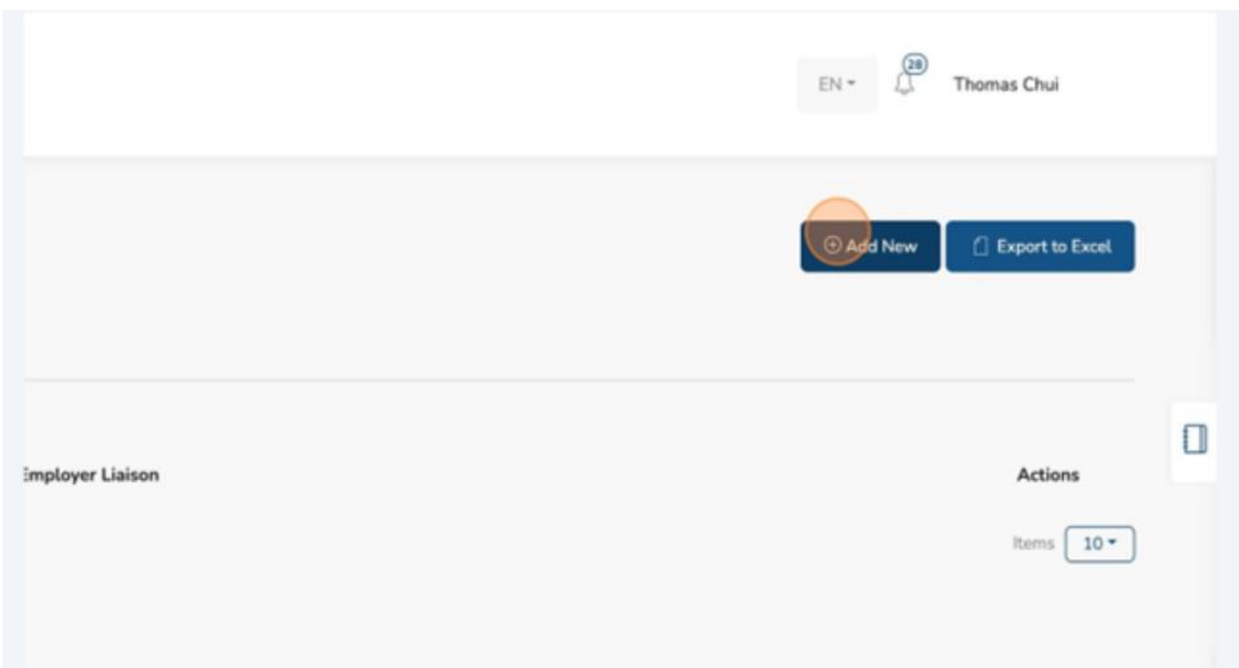
1. Navigate to ESCases navigation bar.
2. Click “Employer and Trainer” in the left Navigation window.



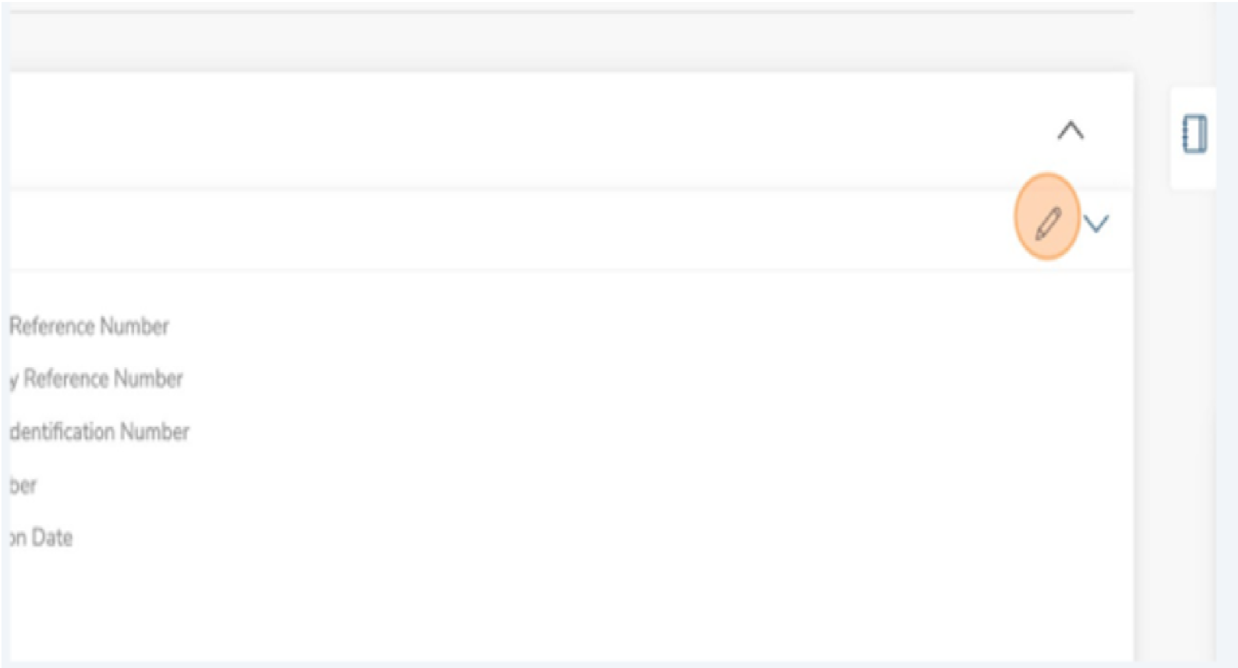
3. Click “Employers.”



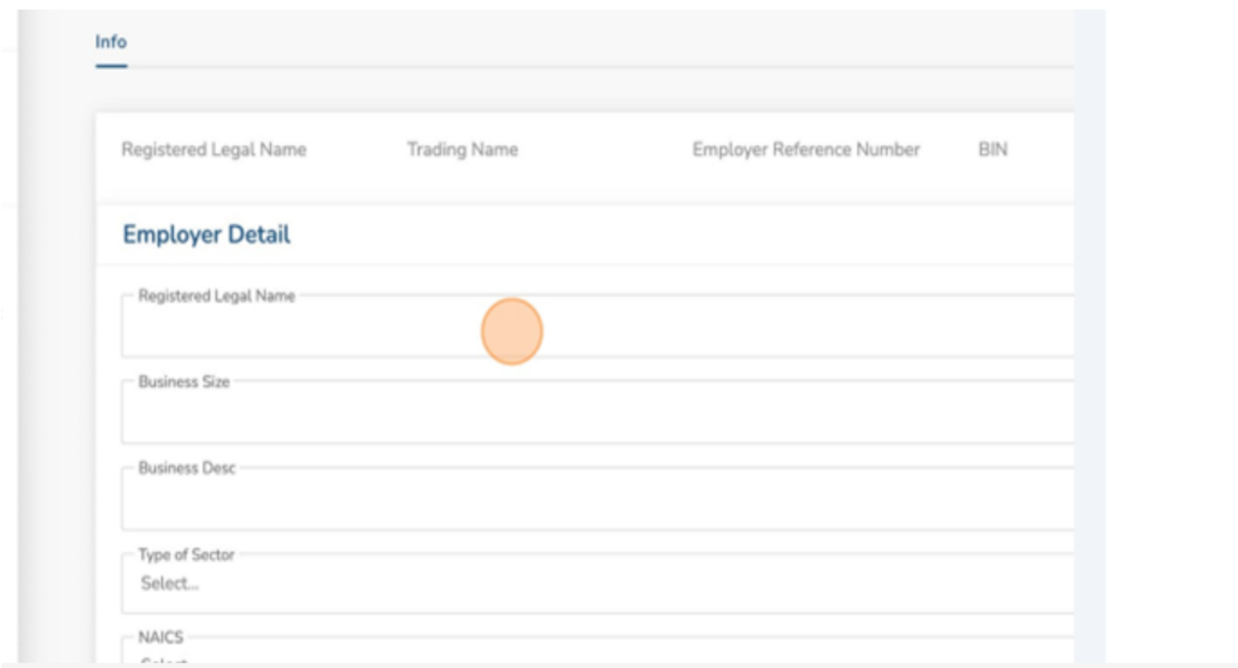
4. Click “Add New.”



5. Click the “Pencil” to edit.

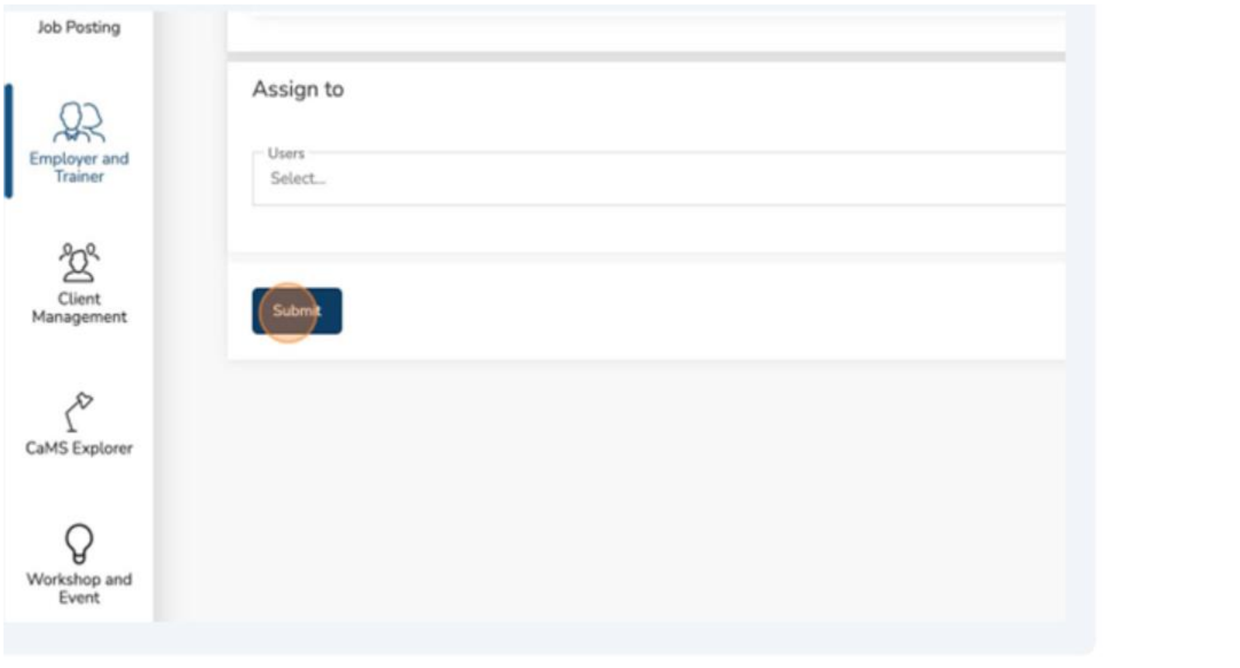


6. Click “Registered Legal Name” and enter the business name of the employer.

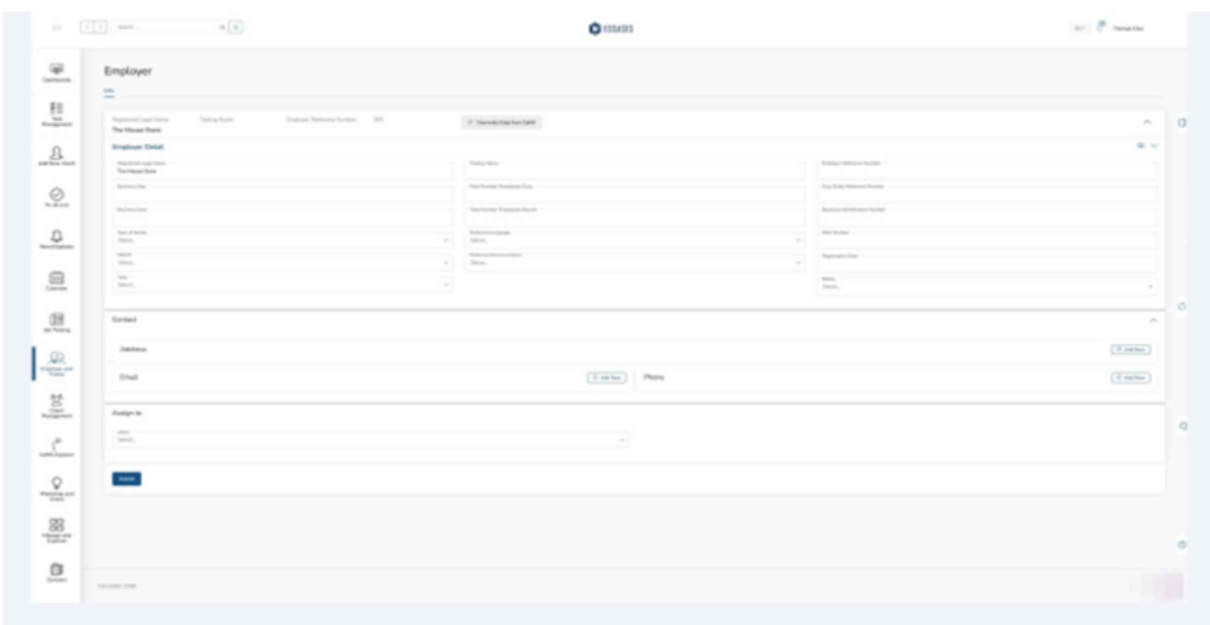


7. Fill in all remaining relevant details.

8. Click “Submit.”



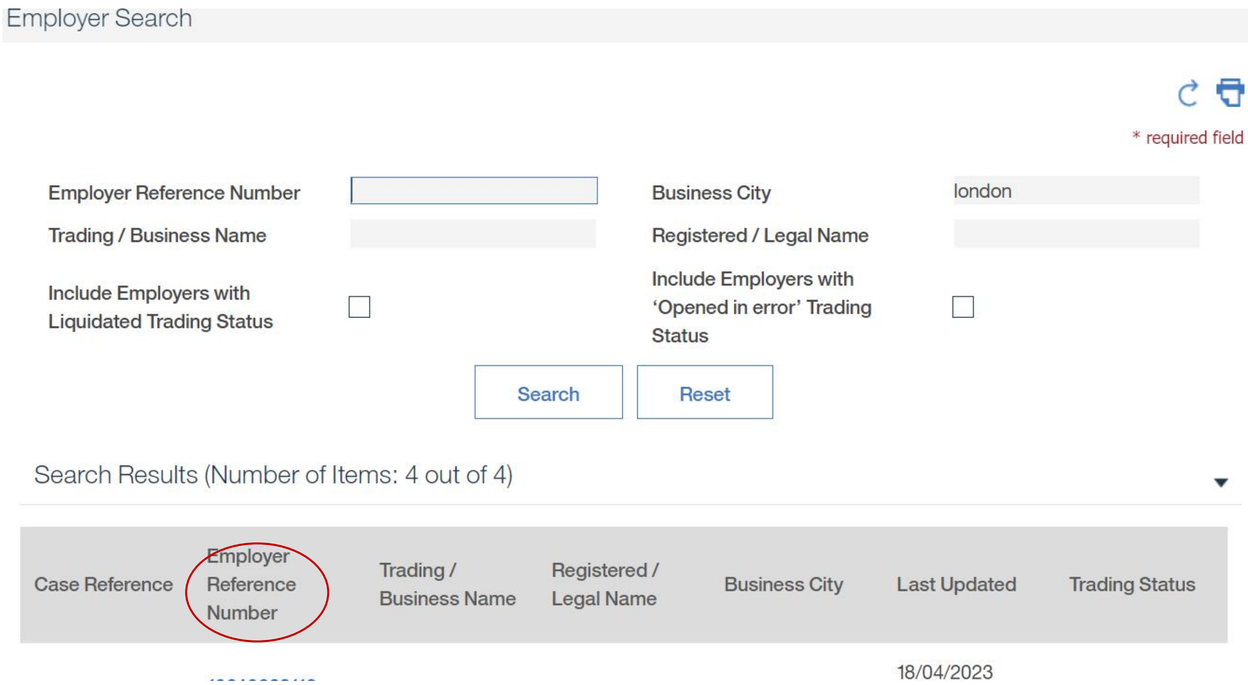
You have now successfully created a new employer profile.



(8) Linking an Employer with CaMS

To Locate the employer reference number in CaMS:

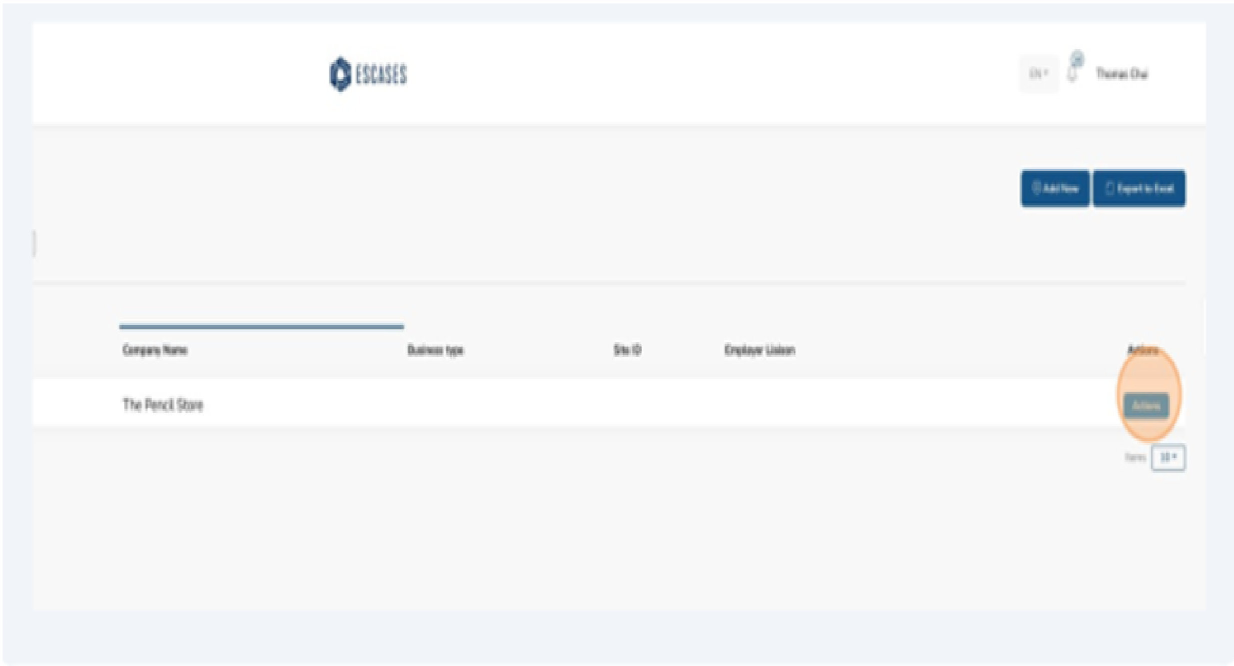
- Navigate to “Cases and Outcomes.”
- Open “Short Cuts.”
- Select “Find Employer.”
- Enter the employer information under “Employer Search.”
- Copy “Employer Reference Number” from the “Search Results” list.



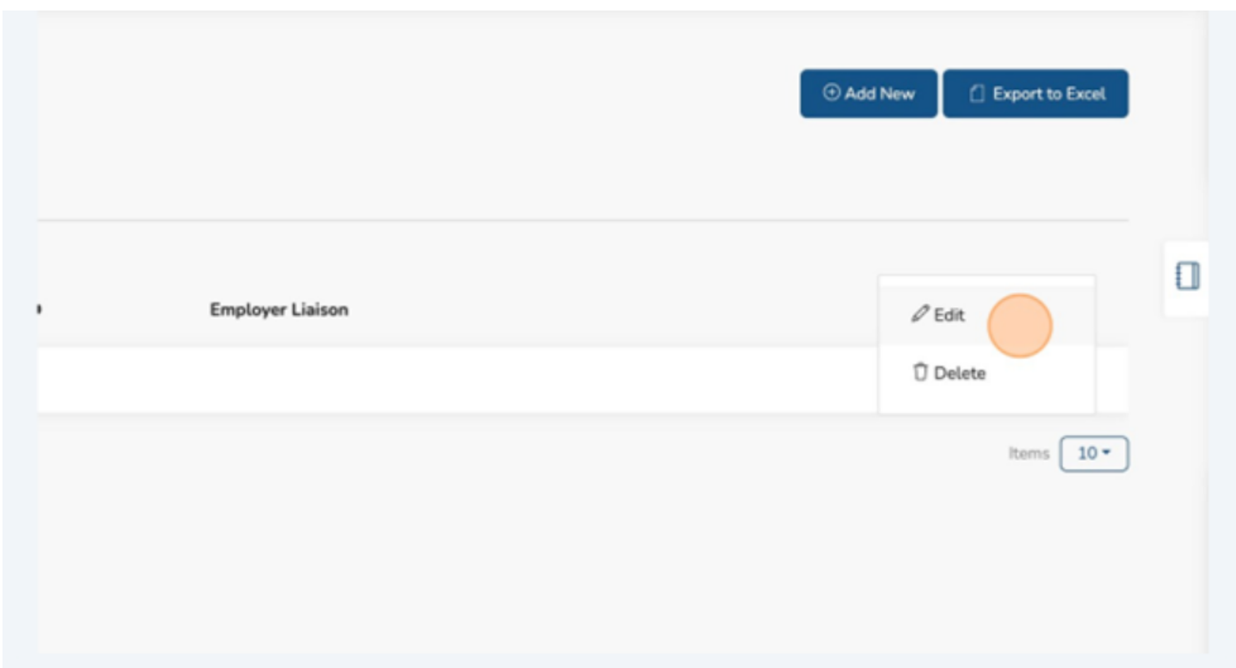
➢ Alert! A new version of this is currently being developed and should be live in Q2 of 2024 where full two-way syncing will be implemented.

Navigate to the Employer Profile that you want to Link with CaMS.

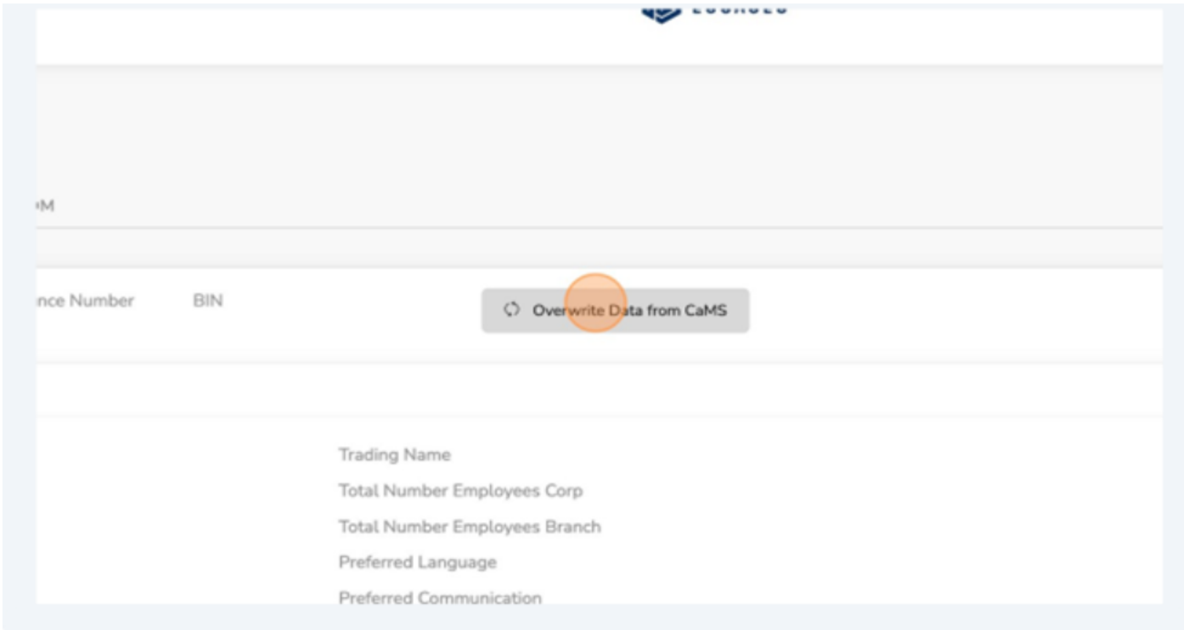
1. Click “Actions.”



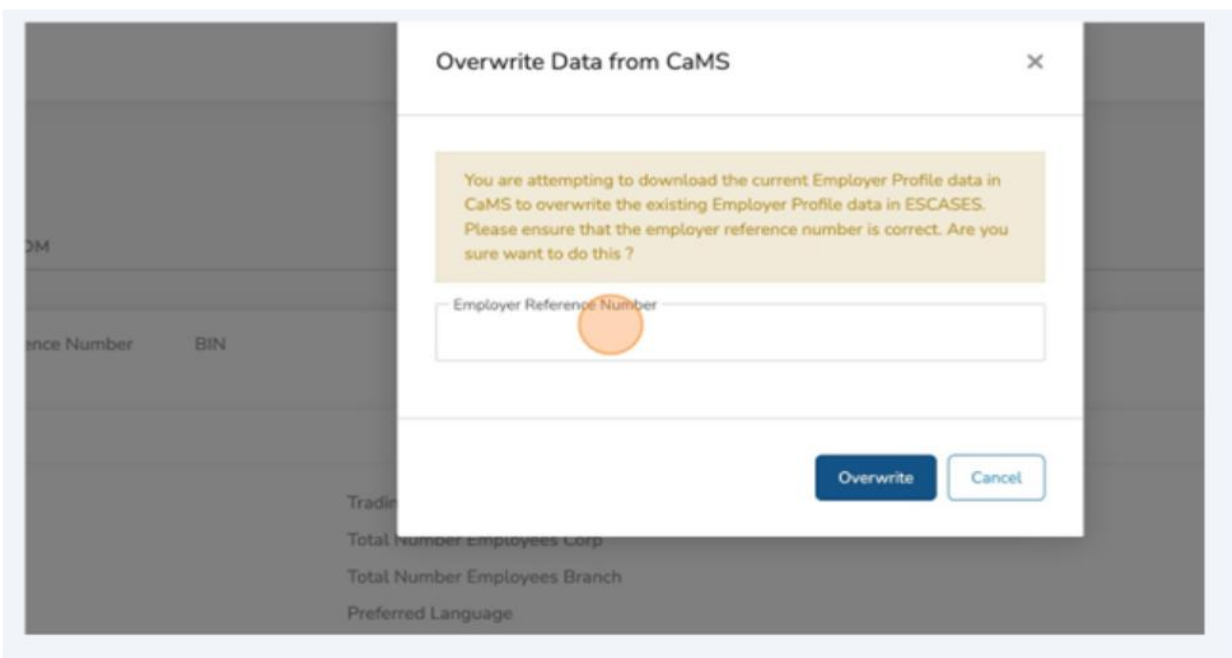
2. Click “Edit.”



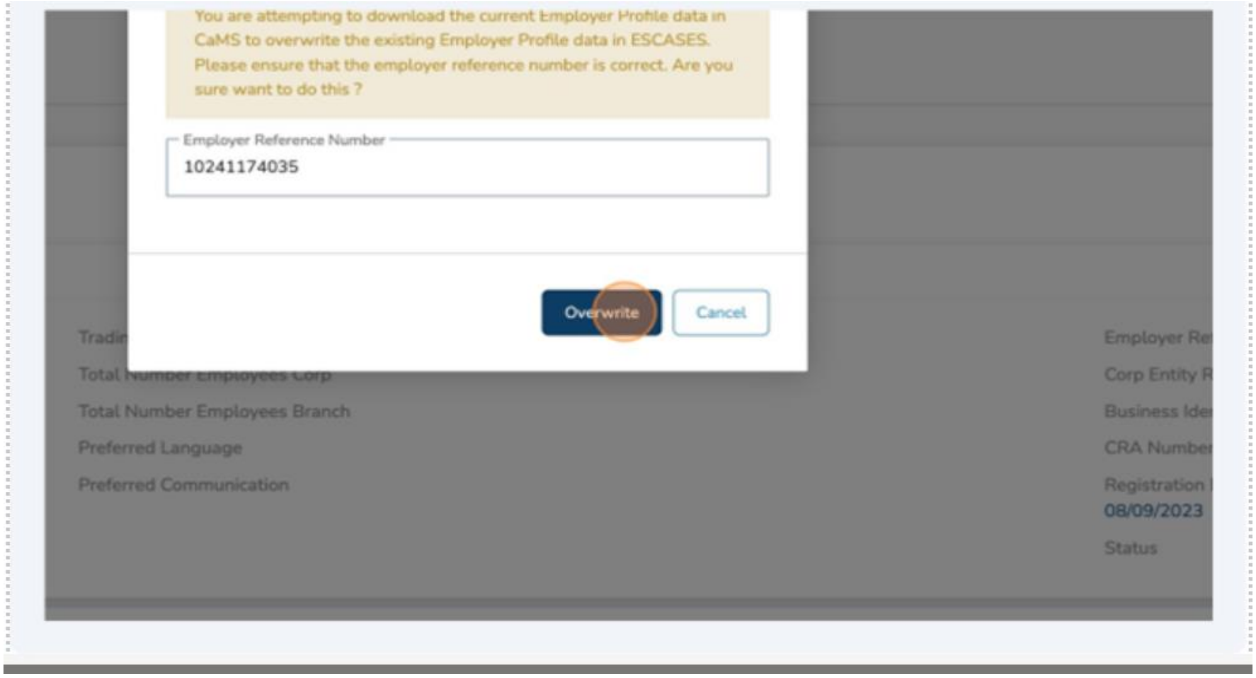
3. Click “Overwrite Data from CaMS.”



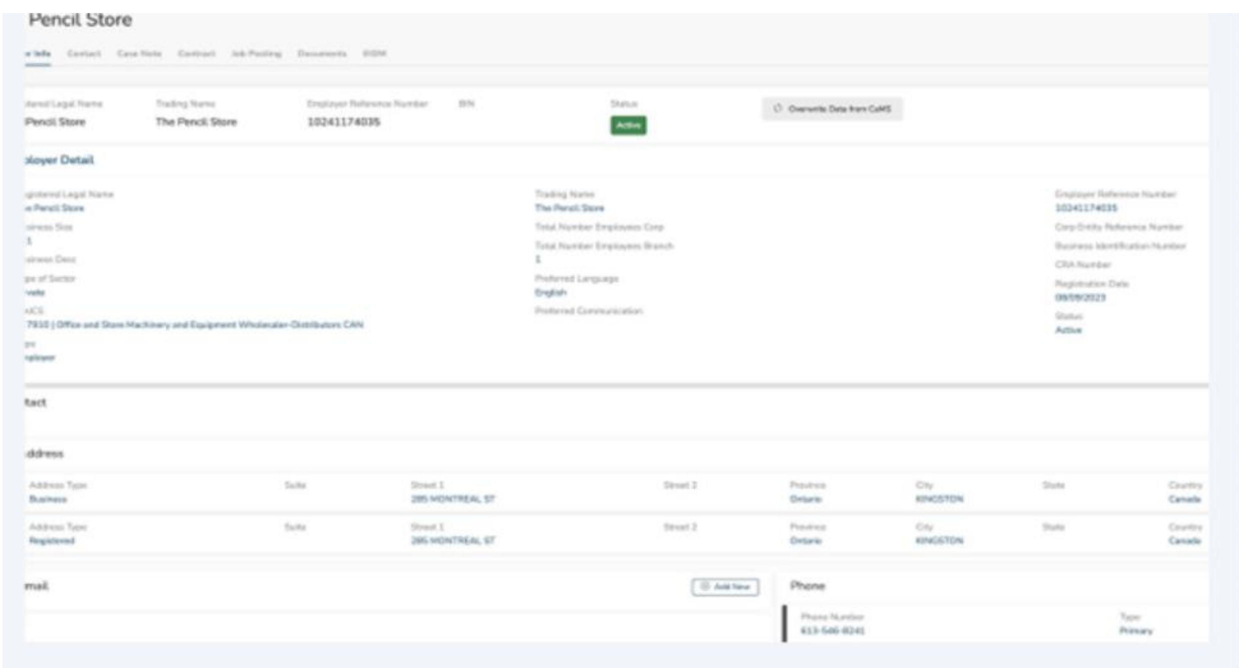
4. Click “Employer Reference Number.”



5. Click “Overwrite.”



You have successfully linked the employer’s profile with CaMS.

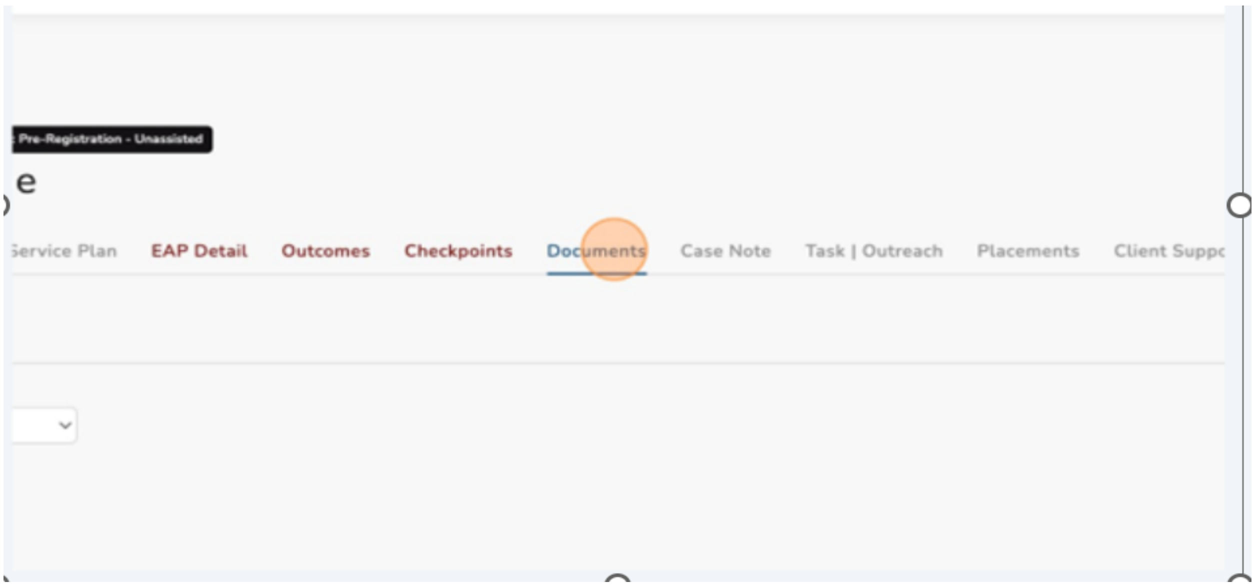


- ➢ Alert! Ministry APIs dictate that employer profiles in CaMS are not continuously synced with ESCases. Changes made in ESCases do not reflect in CaMS. If you want to update an employer profile, please do so in CaMS and repeat Step 4 onward from the above steps to update the changes in ESCases.

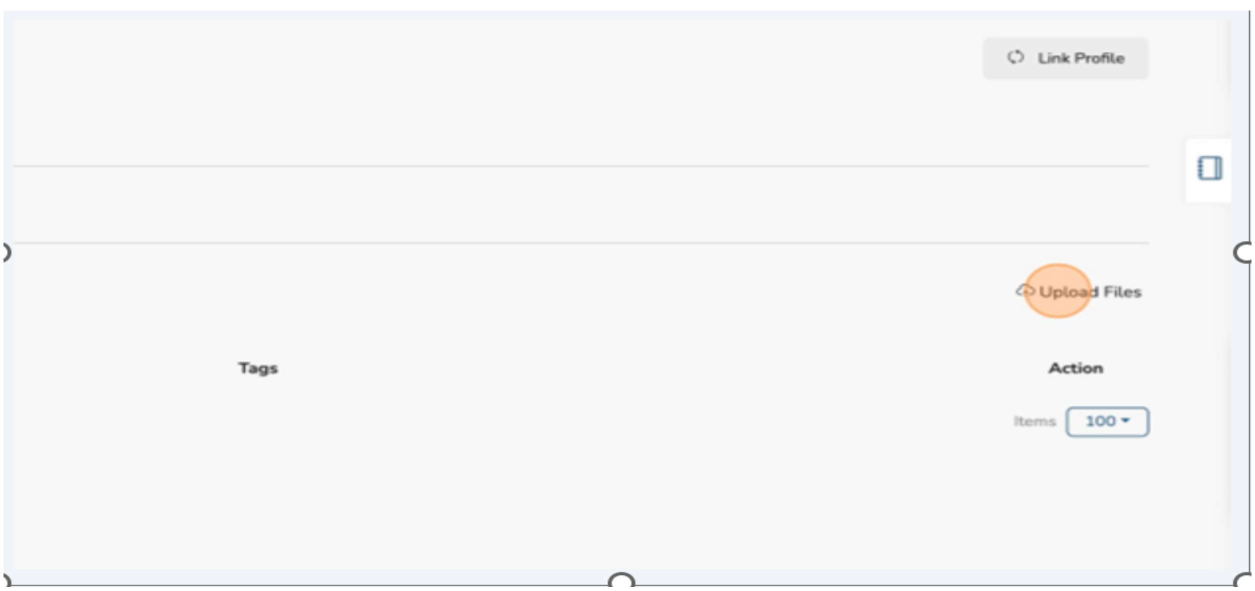
- ✓ Note: The employer can be assigned to a staff member. The default is “My Employers” which allows you to view the employers you created in ESCases. Changing the default to “All Employers” will allow you to view all employers for your location.

(9) Upload a Document to a Client Profile

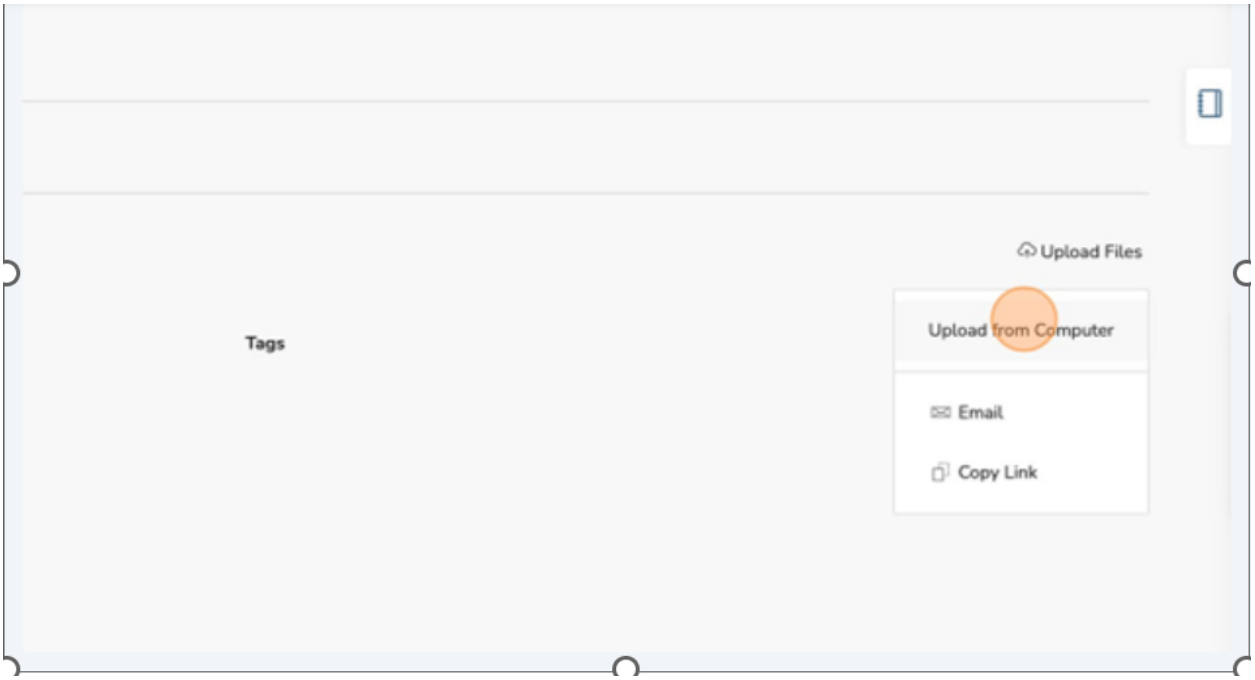
1. Navigate to the Client profile.
2. Click “Documents.”



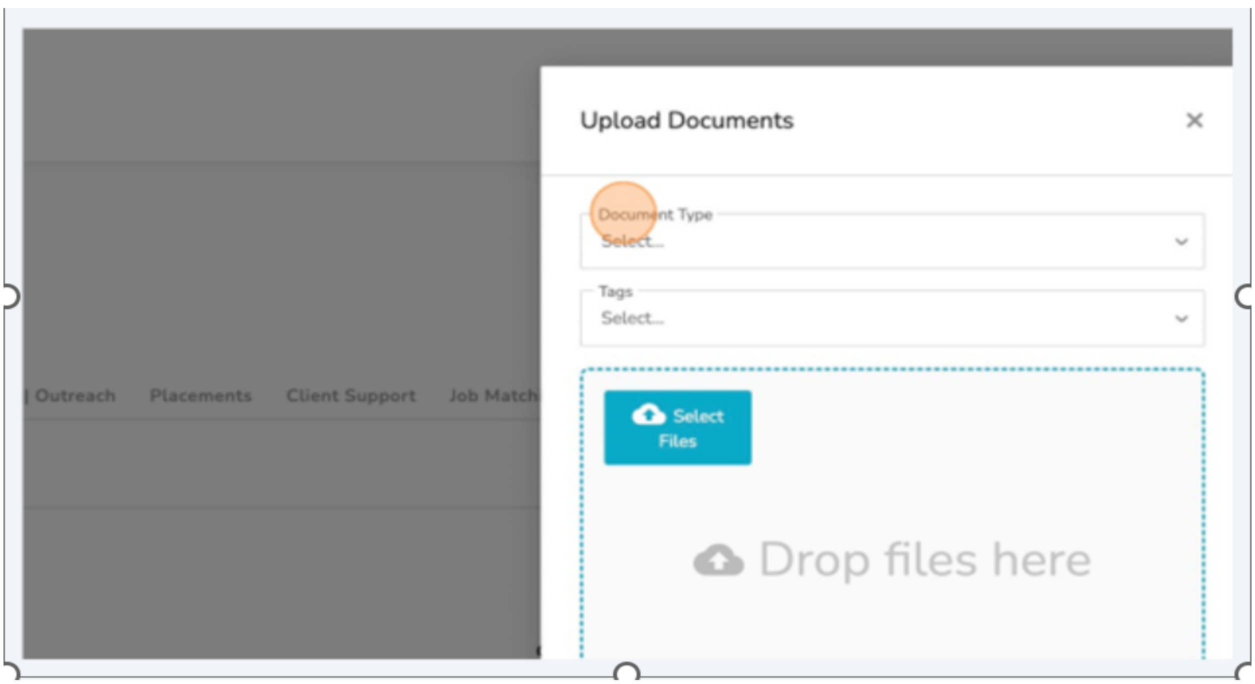
3. Click “Upload Files.”



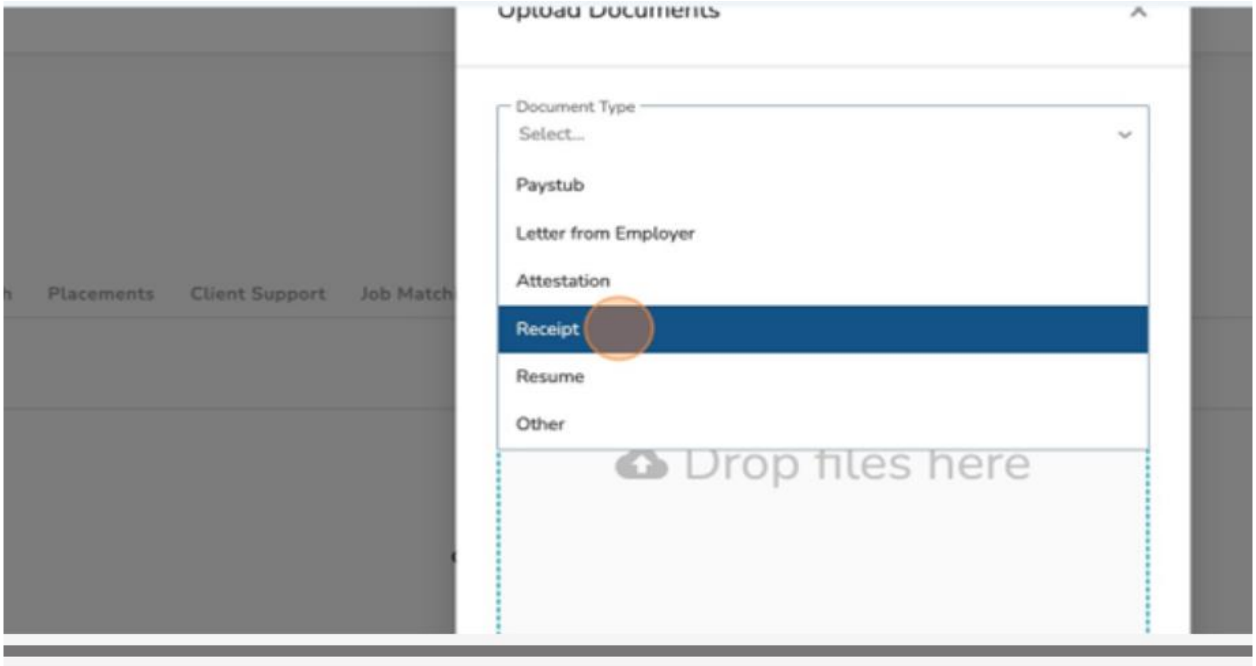
4. Click “Upload from Computer.”



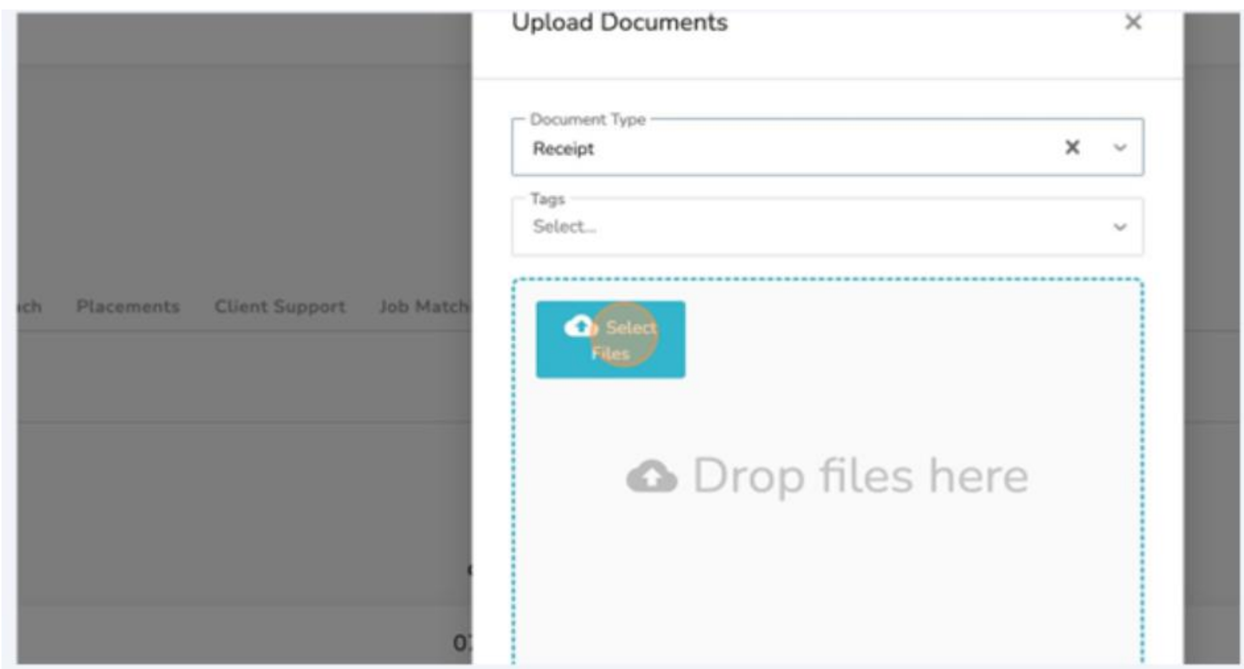
5. Click “Document Type.”



6. Select the appropriate document type.

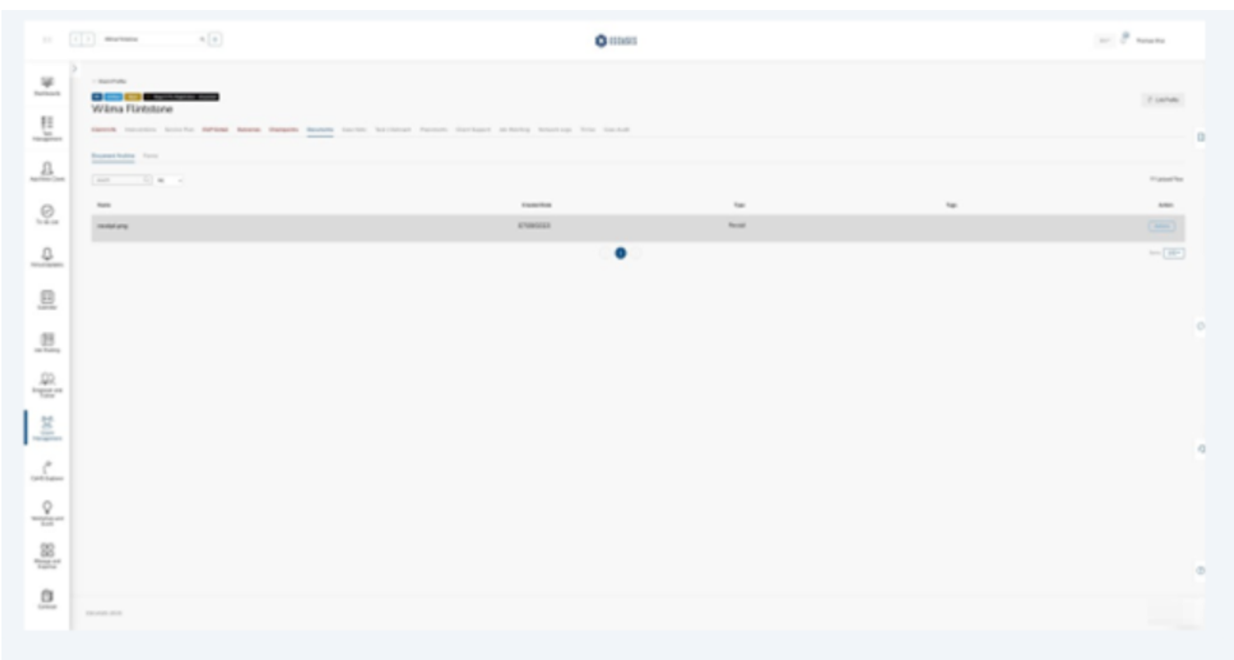


7. Click “Select Files” and choose the appropriate file from your computer.



8. Click "Submit."

9. Your file has been successfully uploaded to the client profile.

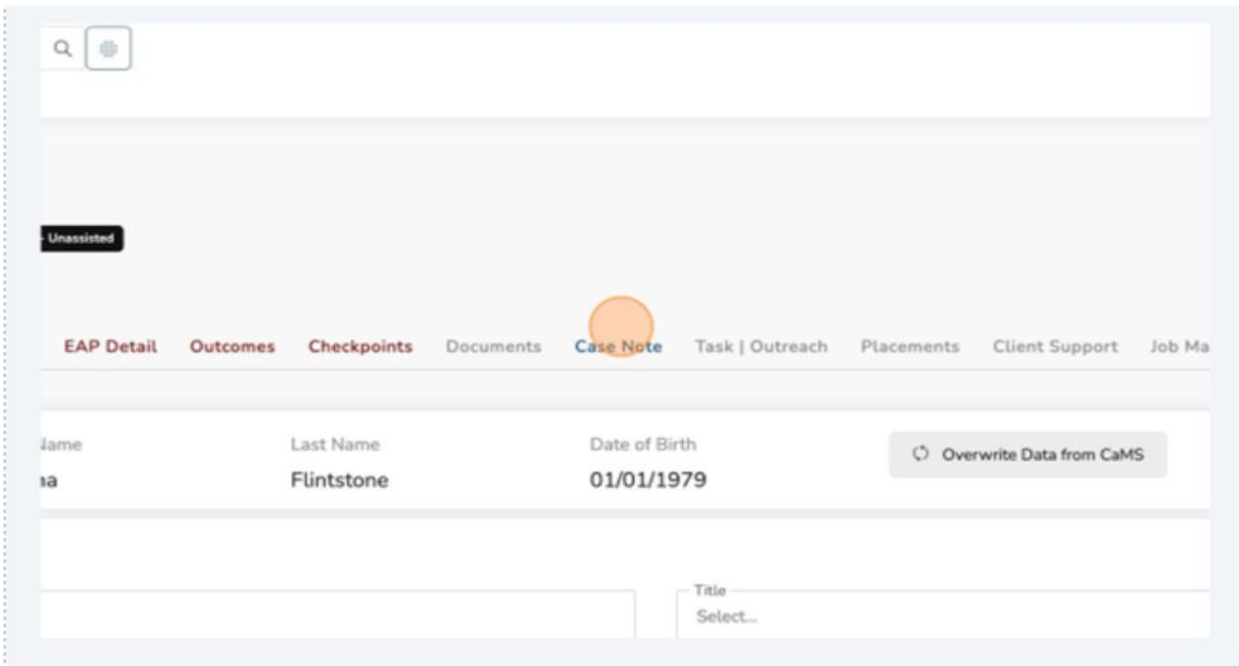


(10) Add a New Case Note

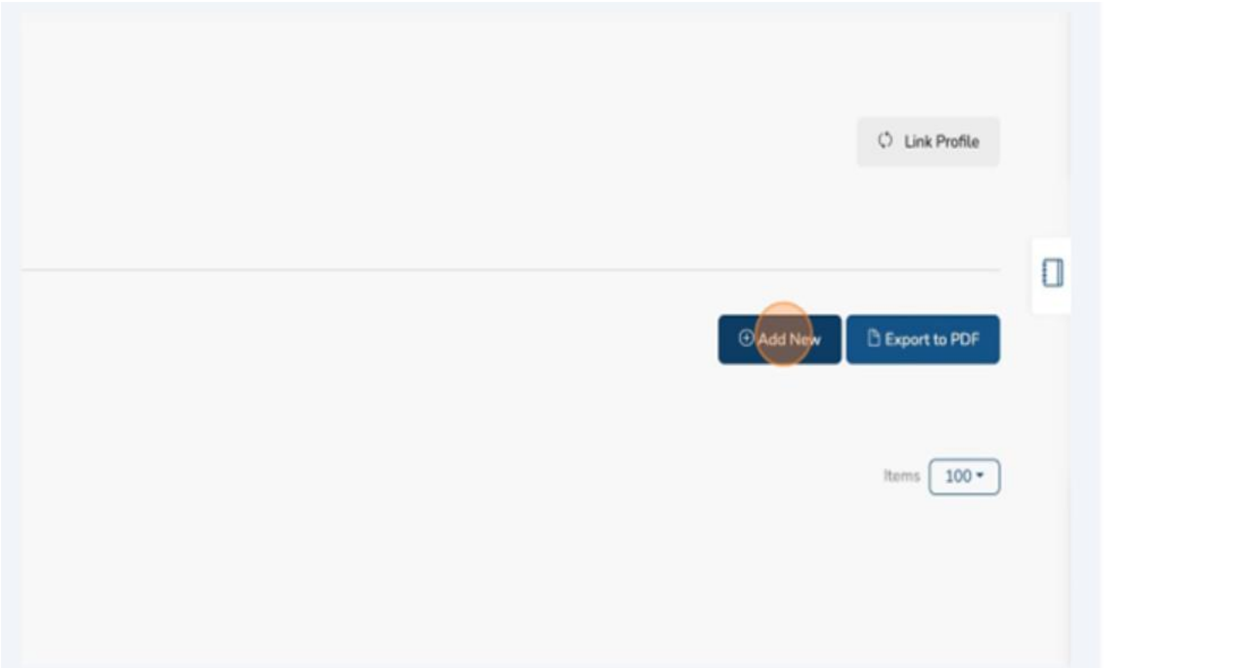
❖ Tip: Not only do case notes help you comment on client interactions, but they also appear visually in your "Task Management" summary as a "Client Last Contact" pie chart.

To Create a Case Note:

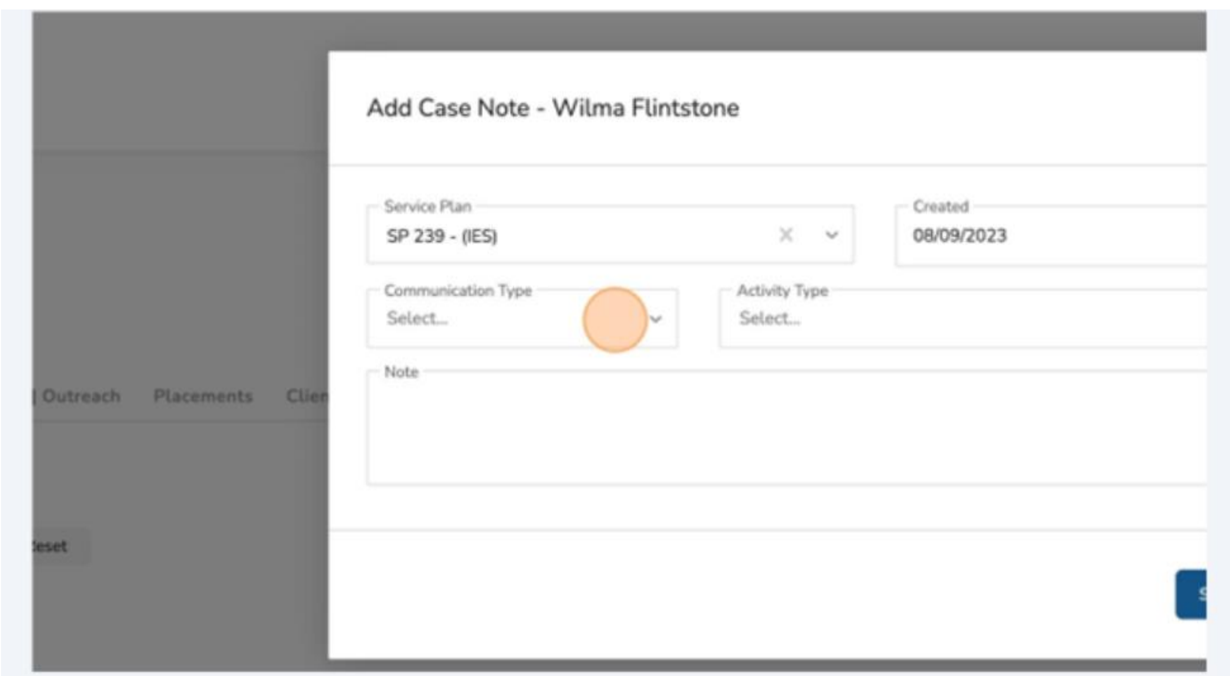
1. Navigate to the client profile.
2. Click "Case Note."



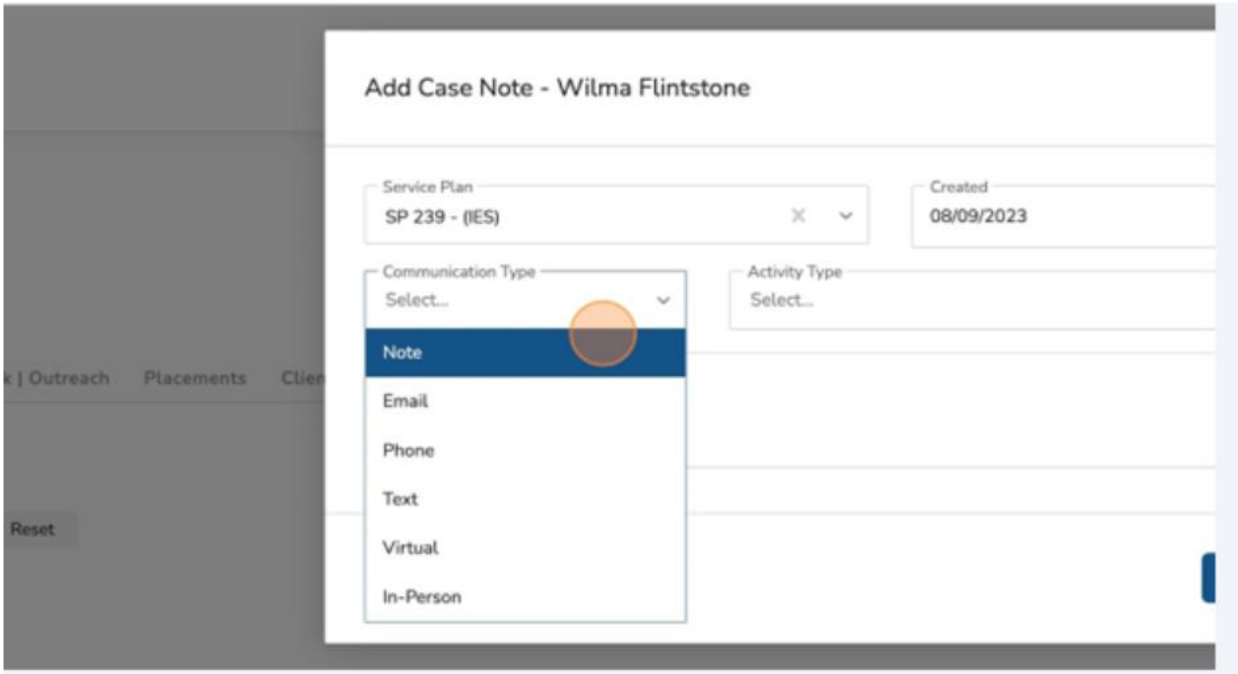
3. Click “Add New.”



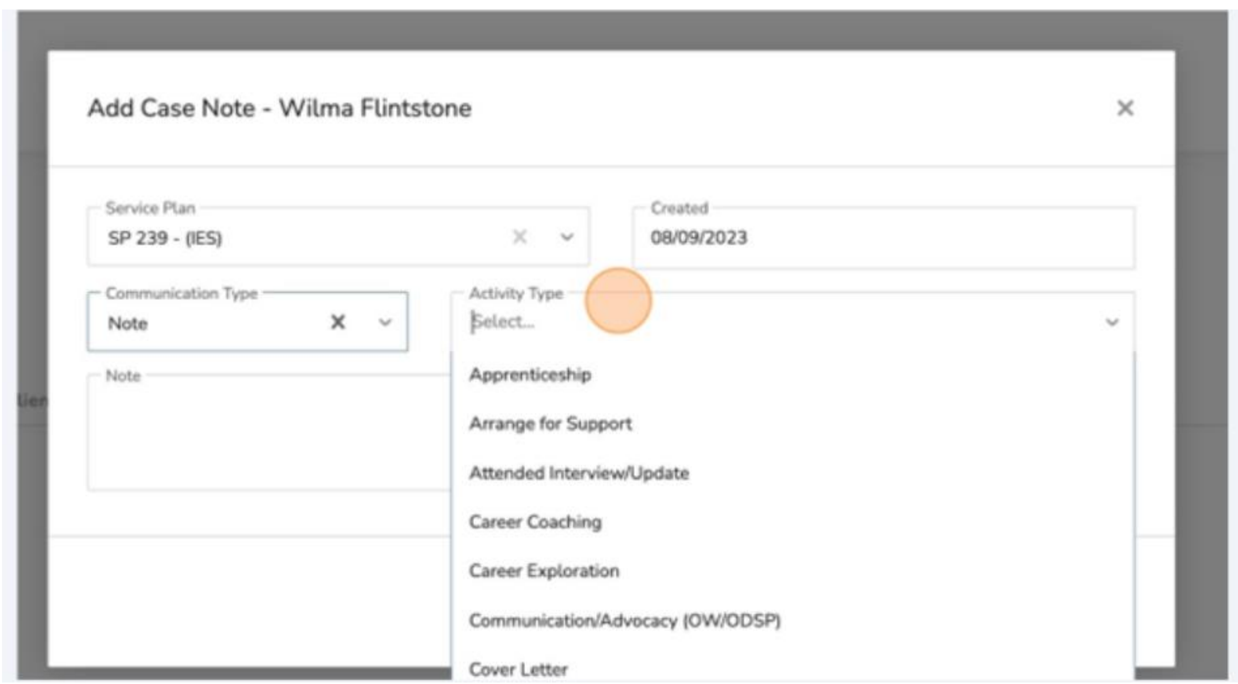
4. Select “Communication Type.”



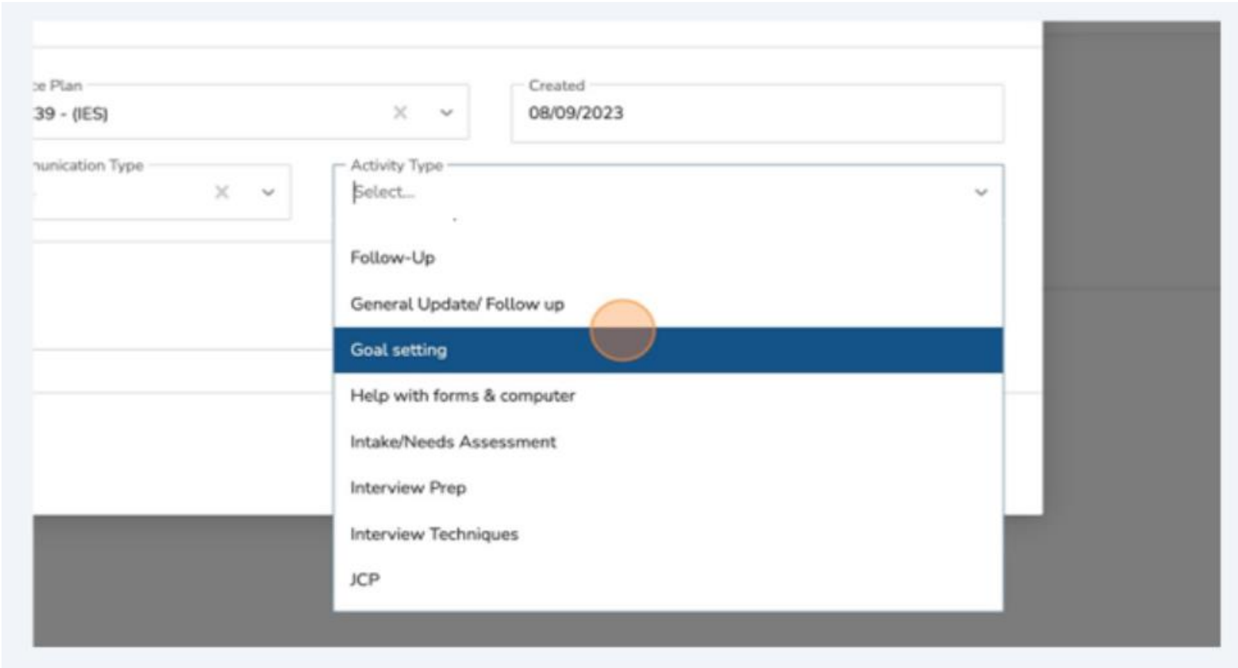
5. Select the appropriate "Communication Type."



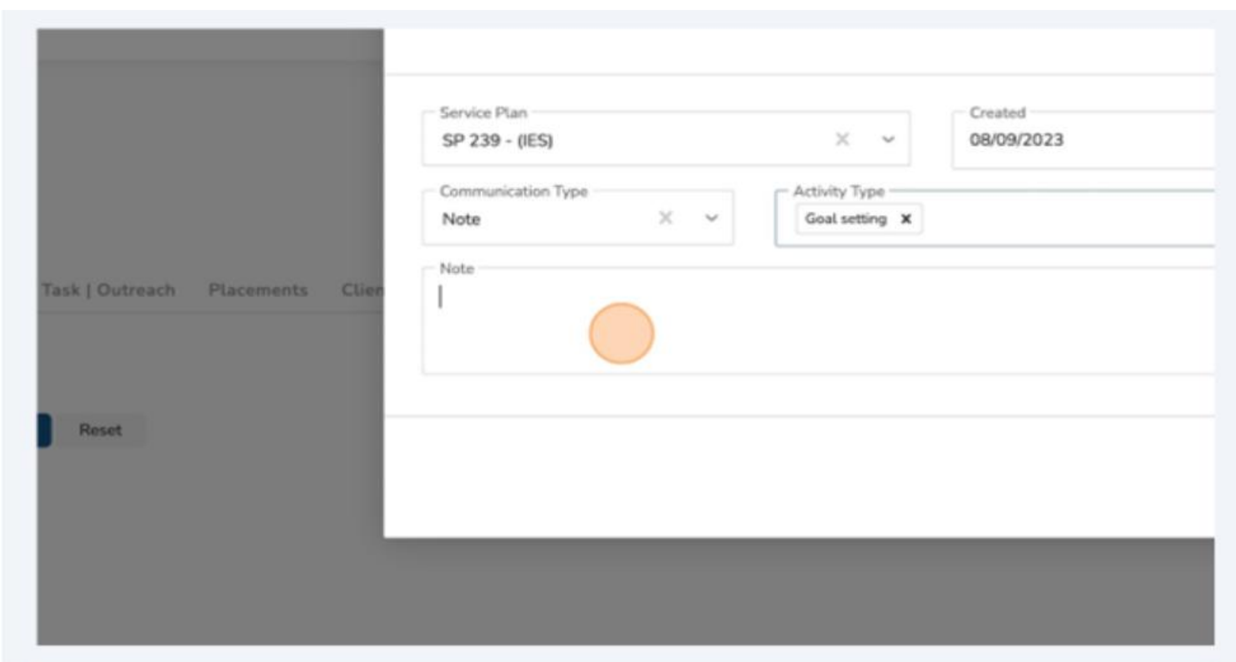
6. Click "Activity Type."



7. Select the appropriate “Activity Type.”

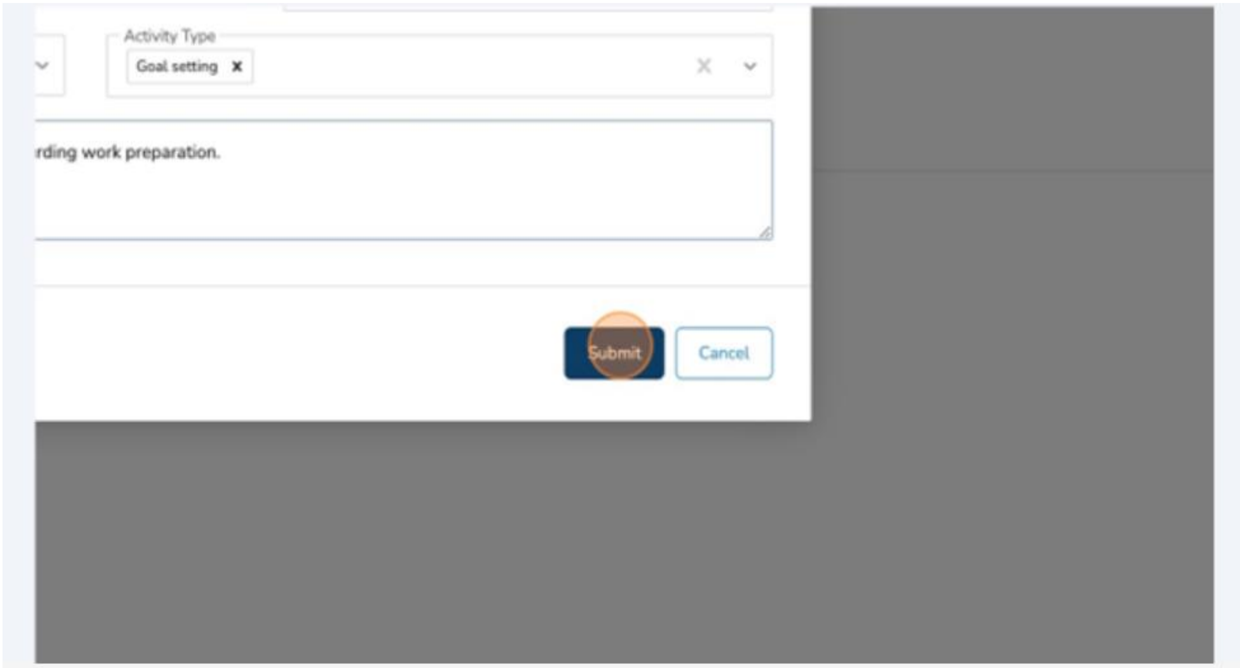


8. Click the “Note” field.



9. Fill in your comments in the “Note” field.

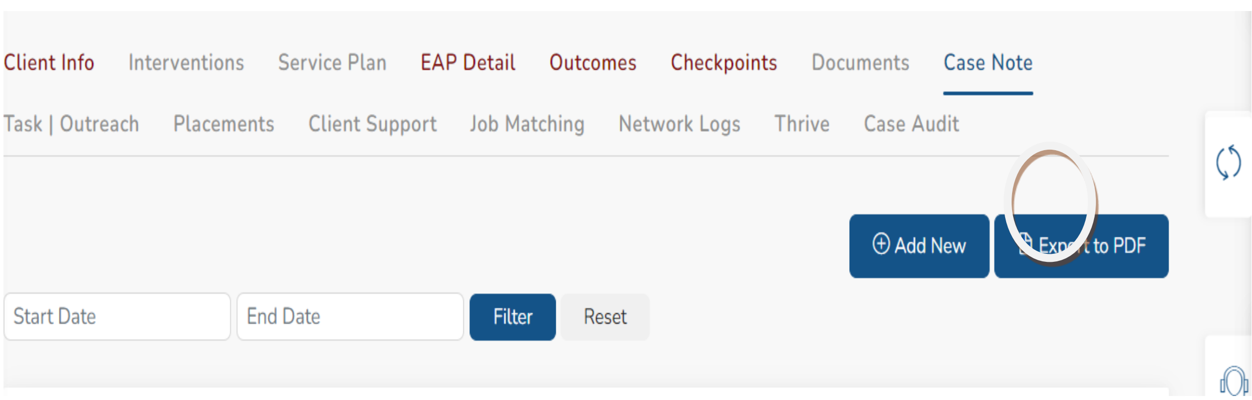
10. Click “submit.”



You have now successfully created a new note.

To print a list of notes:

1. Click “Export to PDF.”



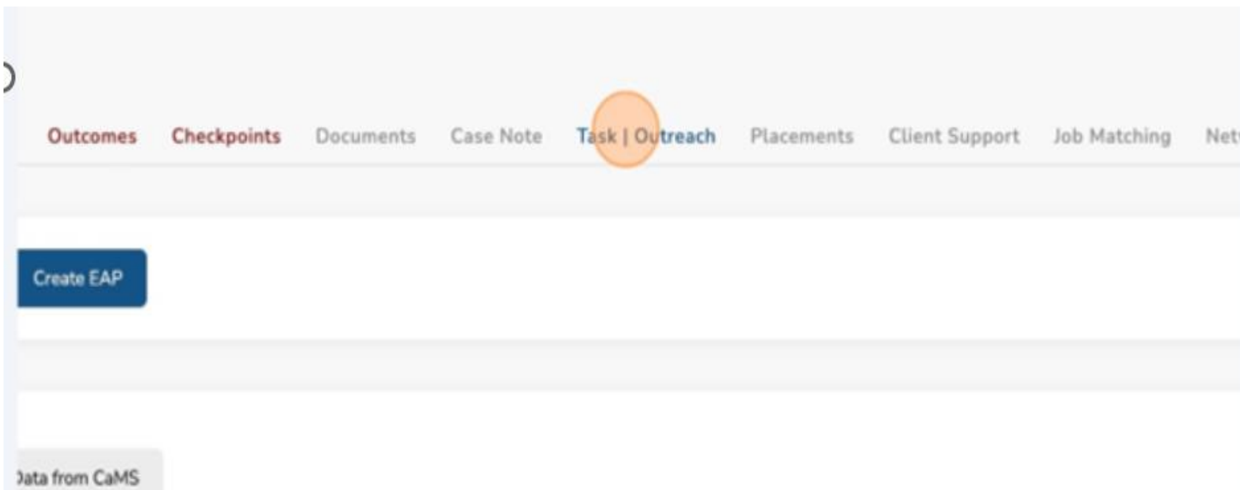
- Under “Downloads” Select “Open File.”
- A list of Case Notes for the client will be displayed.

(11) Add a Task

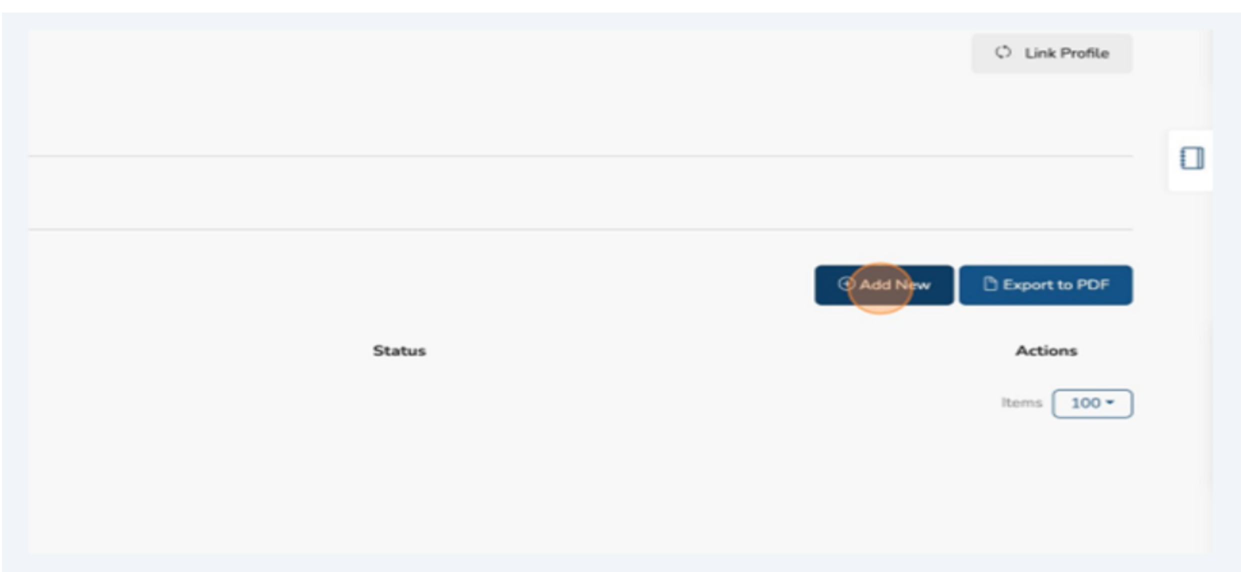
Using the task function is an effective method for handling items that are time critical. Tasks can also be assigned to clients so they too can receive notifications from the system regarding time sensitive items.

Navigate to the client profile.

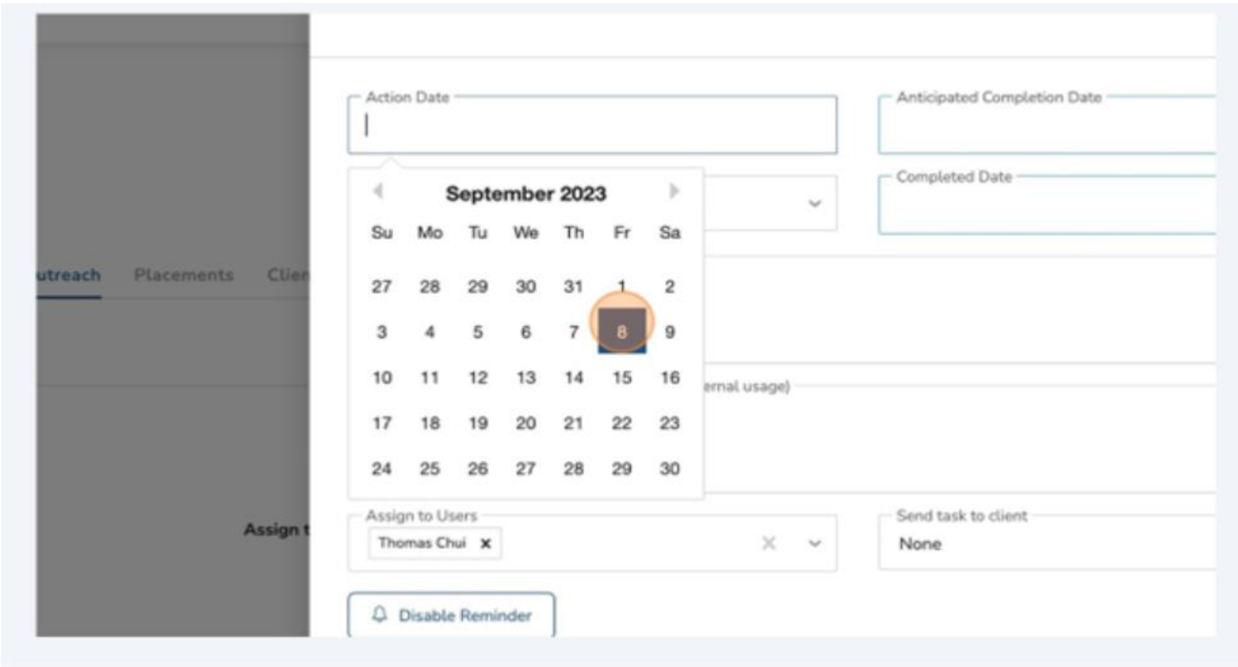
1. Click “Task/Outreach.”



2. Click “Add New.”

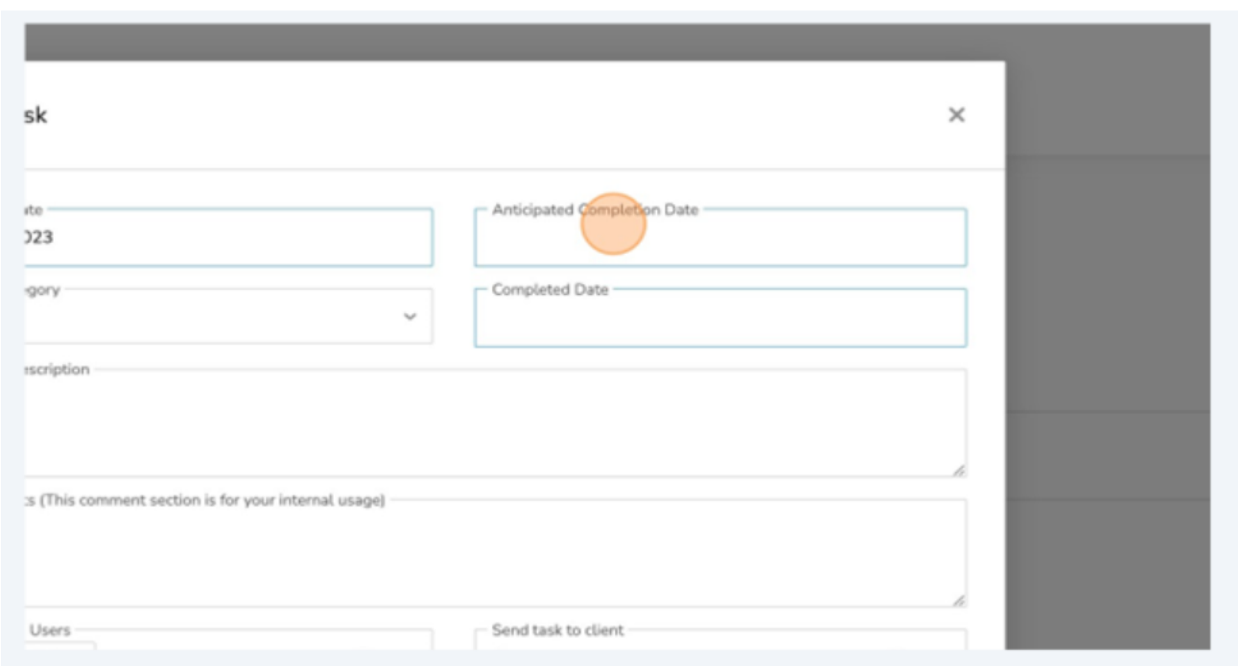


3. Click “Action Date.”

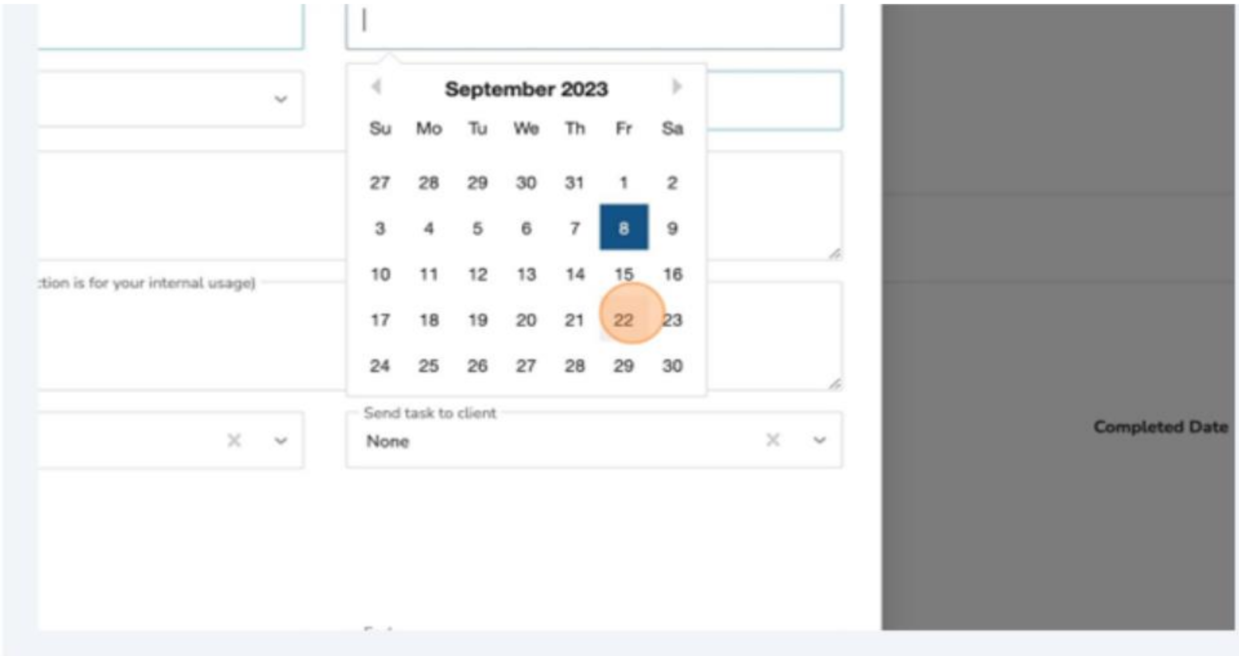


4. Select the appropriate start date.

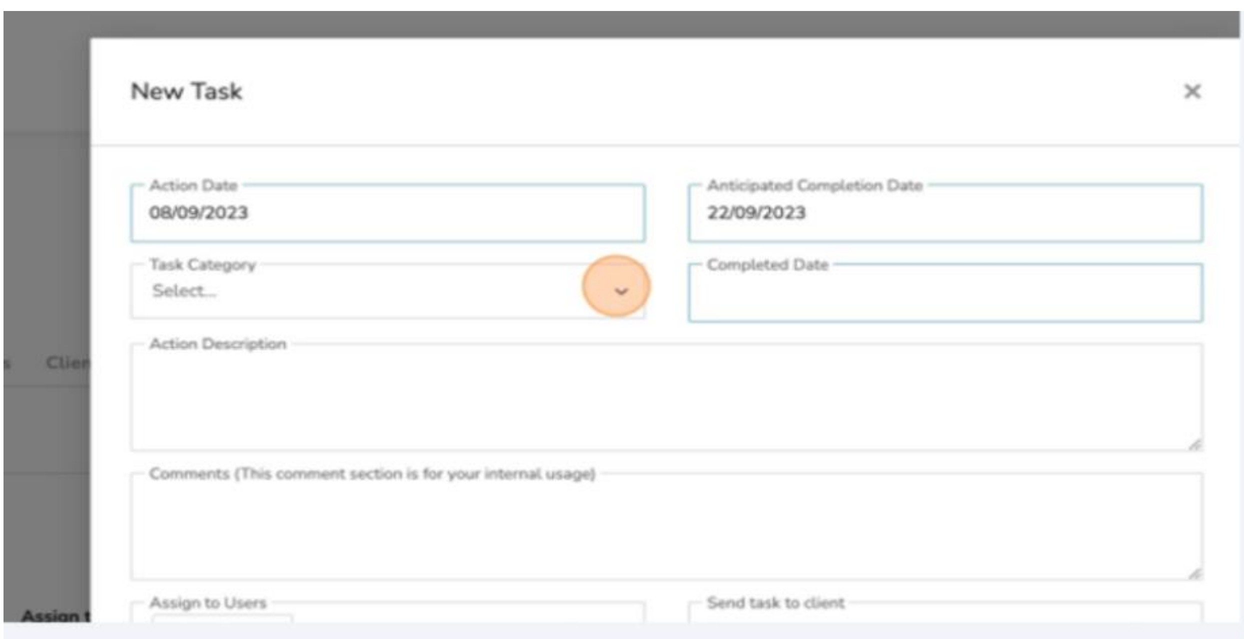
5. Click “Anticipated Completion Date.”



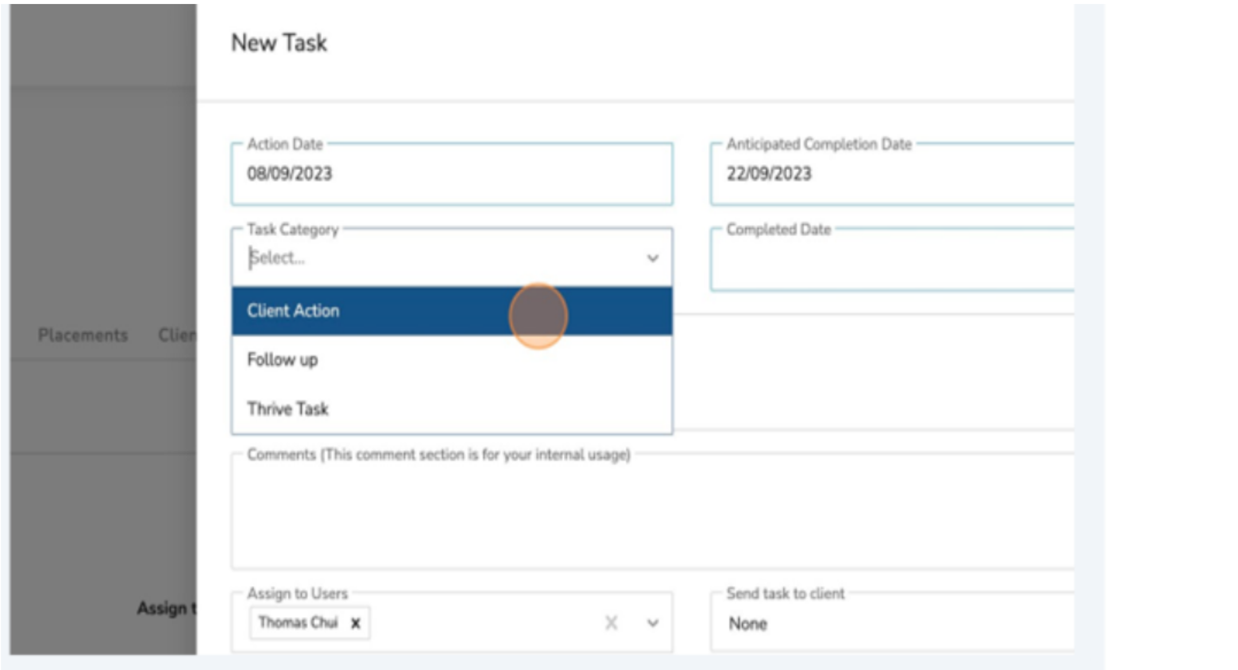
6. Select the appropriate "Anticipated Completion Date."



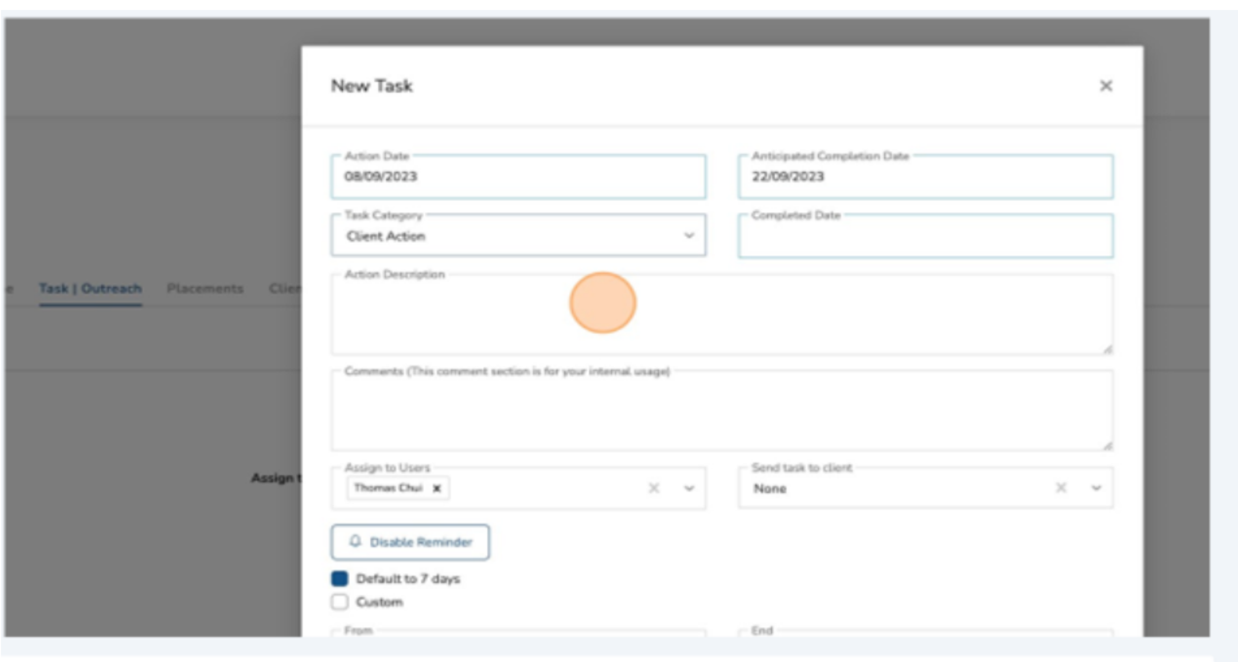
7. Click "Task Category."



8. Select Appropriate Category.



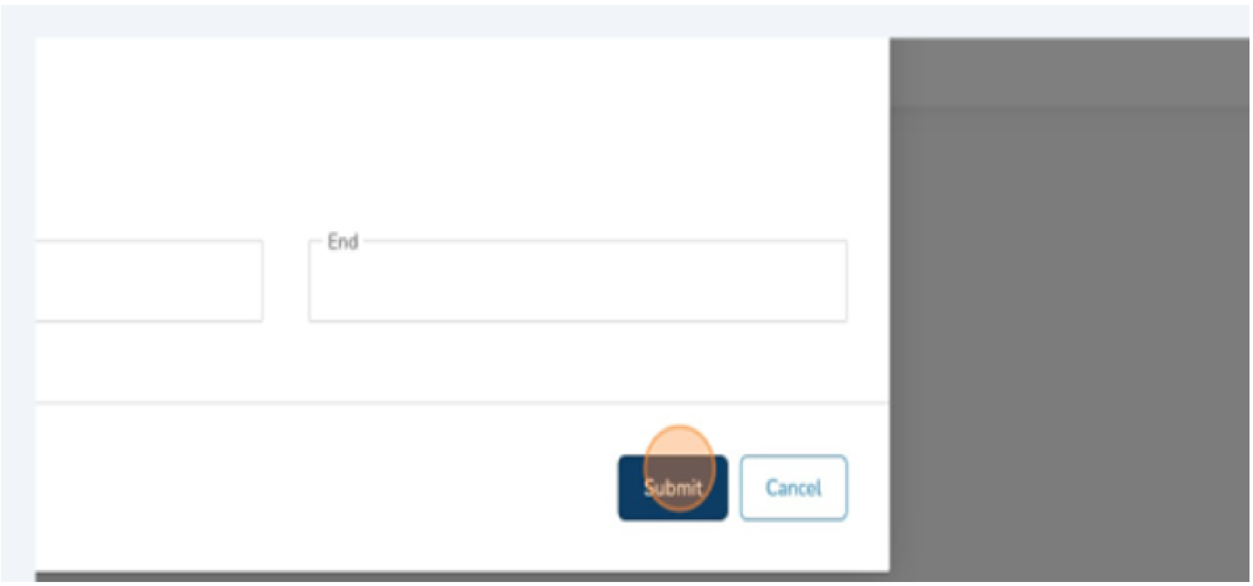
9. Click “Action Description” field.



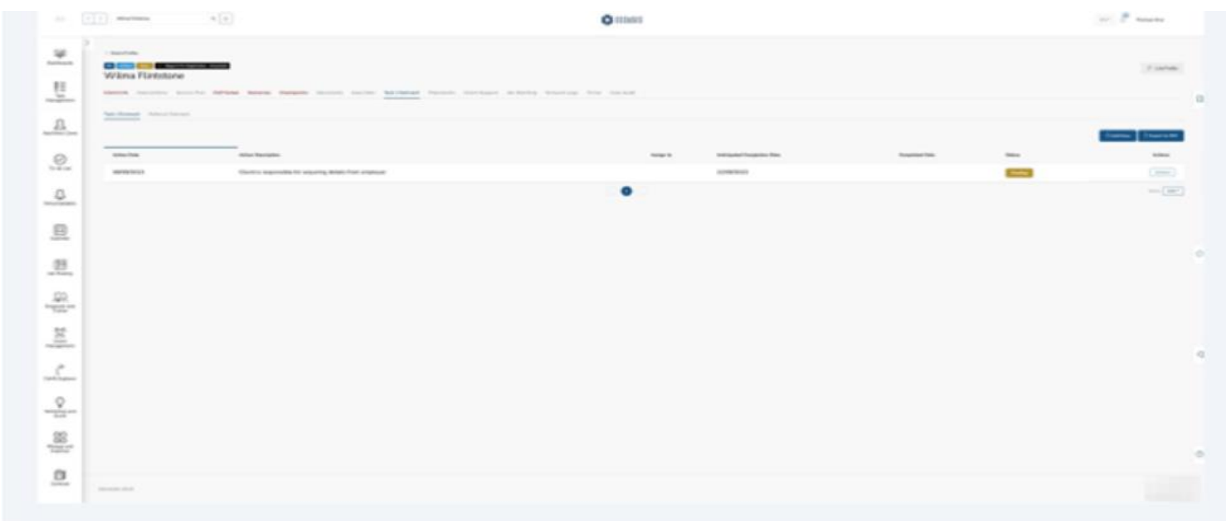
10. Fill in the description.

Heads-up!: The standard reminder period is set to 7 days. Users assigned to tasks will get daily reminders through email and within ESCases notifications, starting from 7 days prior to the "Anticipated Completion Date" and continuing up until that date.

11. Click ”Submit.”

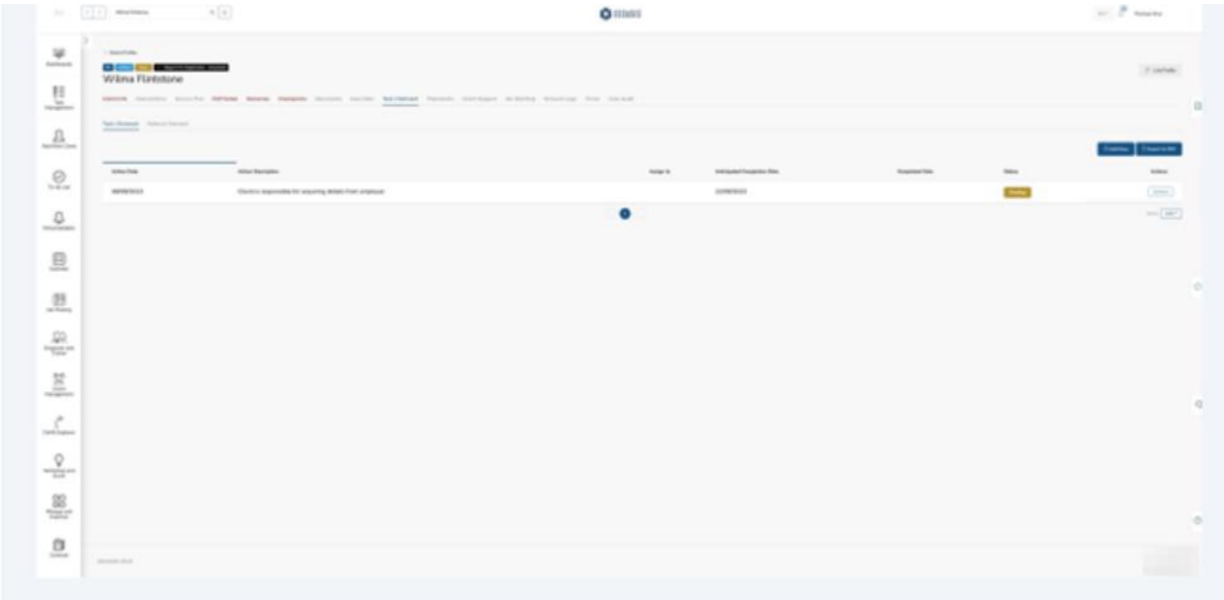


You have now created a new task.



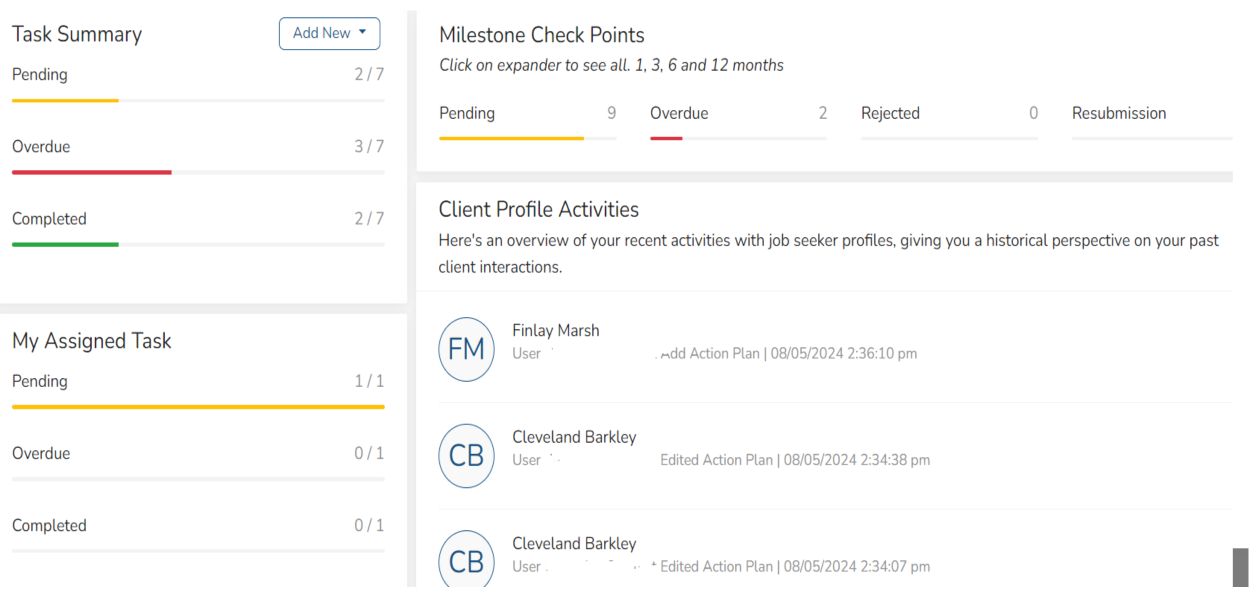
To View the “Task Management” area:

1. Click on the three lines to open the left navigation bar.
2. Select “Task Management” from the side navigation bar.
3. The “Task Management” page will open.



4. Default is “Task.”

The following information can be viewed under task management:



1. Clicking on the status (pending, overdue, completed) will provide a list of clients.
2. Clicking on a client name under “Client Profile Activities” will open the “Client Info” page.
3. Additional reports can be found by clicking the three lines on the right of the “Client Last Contact”, “Client profile by Stage” and “Client Profile by EAP Status”.

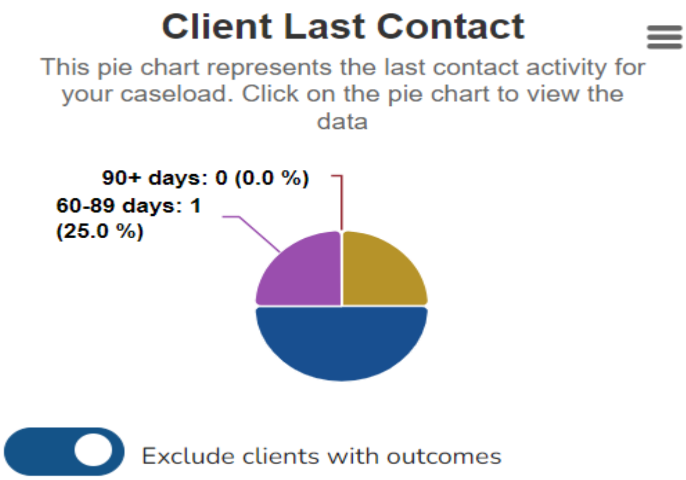
Select “Performance” to view various reports by stream such as:

- Clients by Stream
- Employed at Outcome
- Job Seeker Retained by Employer Overtime
- Unable to Contact Client
- Client Satisfaction by Specialized Population
- Life Stabilization, Employment assistance, Specialized Services, Skills Development, Job Attainment Supports, Job Retention Supports
- Income Supports,
- Hiring by Sector
- Budget Tracking
- Number of Clients in Service
- Employed at Outcome by Specialized Population
- Number of Clients Employed by Month
- Early Exits
- Skills Development
- Employment Assistance Services

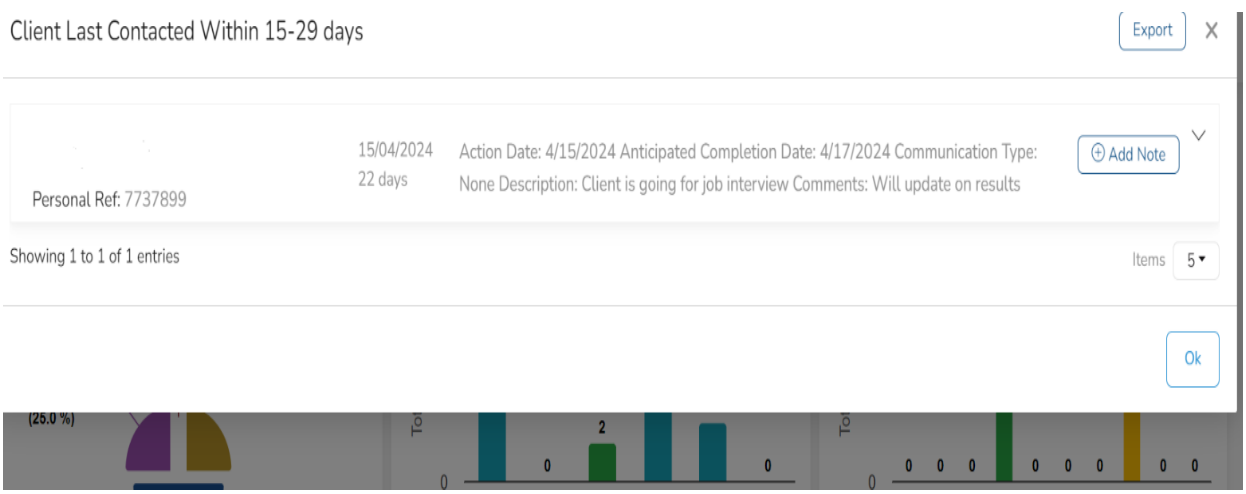
Selecting the three lines to the right of the report will produce a list of information to download.

Scroll down to see the “Client Last Contact” pie chart.

1. Clicking on the three lines in the right-hand corner will produce a list of options to download the data.



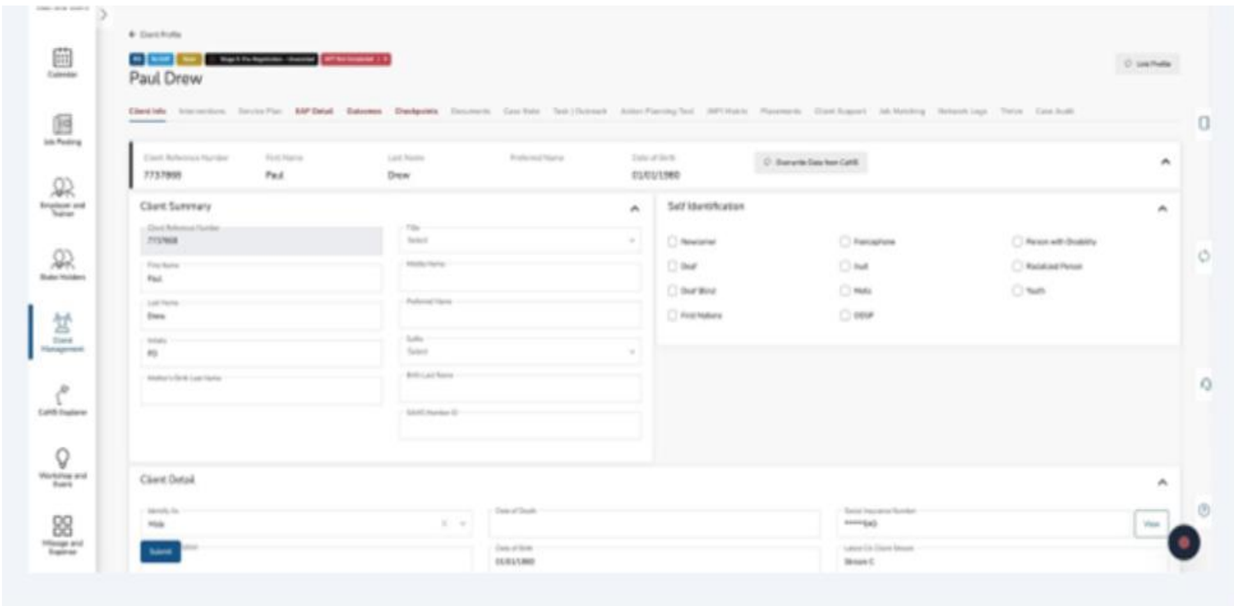
2. Clicking on a section of the pie chart or number of days will provide a list of clients who fall under that category.



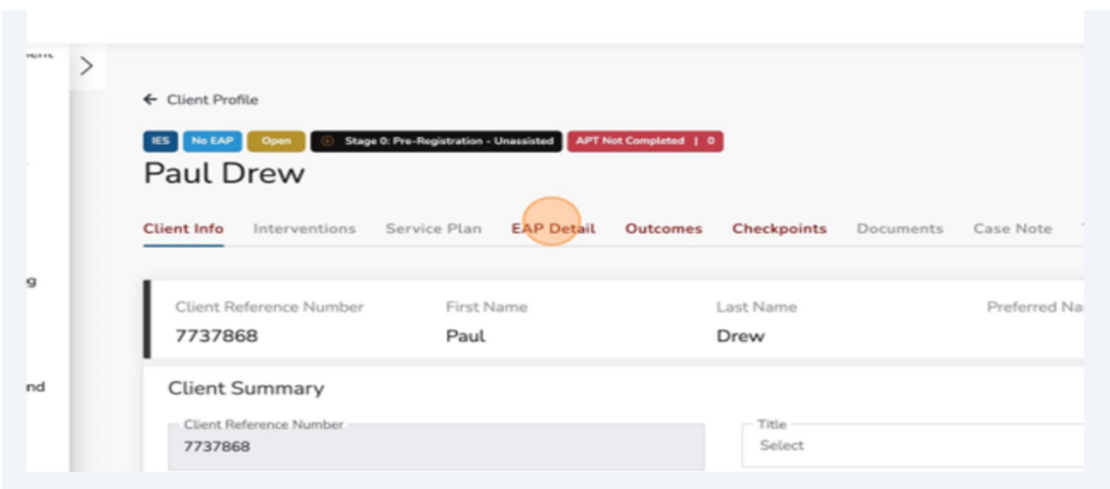
(12) Create an EAP, Sub-Goal, Planned Item with the EAP Assistant

The EAP Assistant will take you through the creation and activation of an EAP, inclusive of adding Sub-Goals and Planned in a two-stage process.

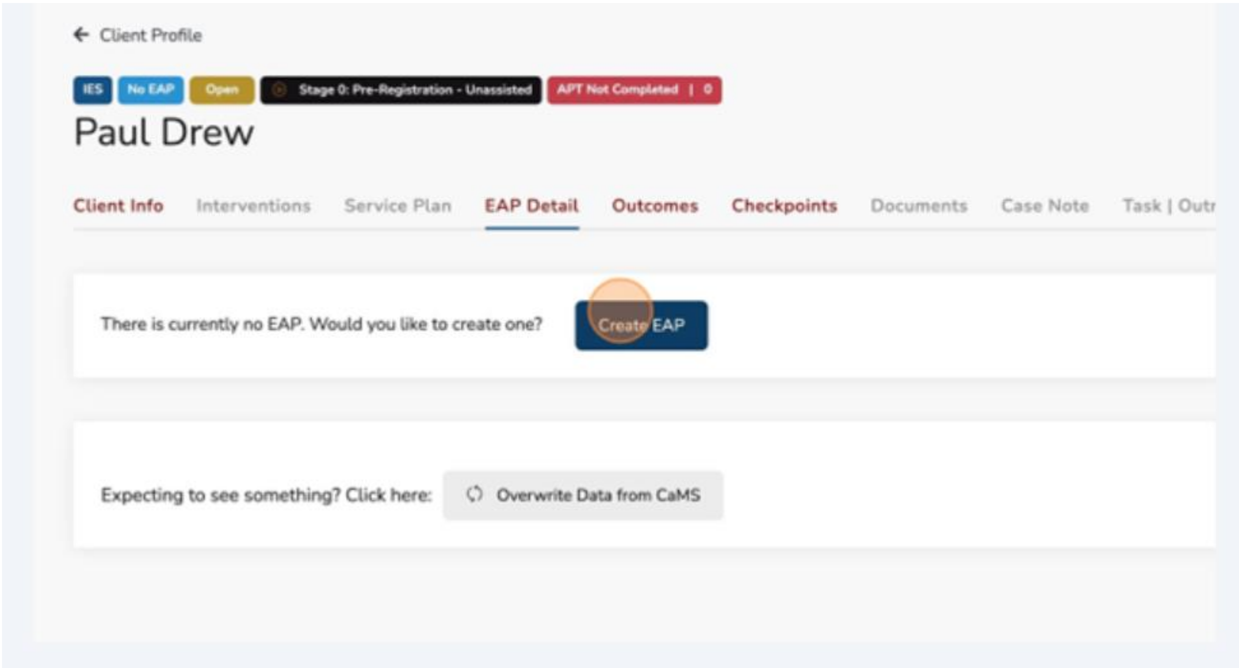
1. Navigate to the Client Profile.



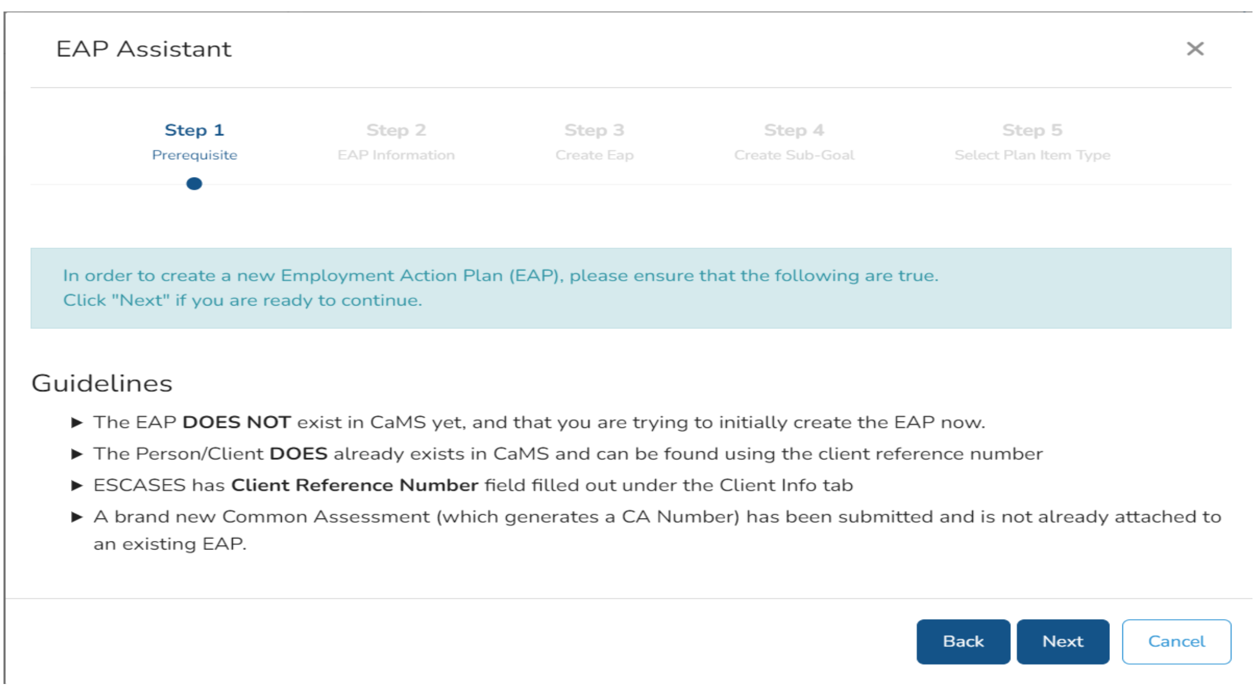
2. Click “EAP Detail.”



3. Click "Create EAP."



The EAP Assistant will display the following guidelines prior to adding the EAP.

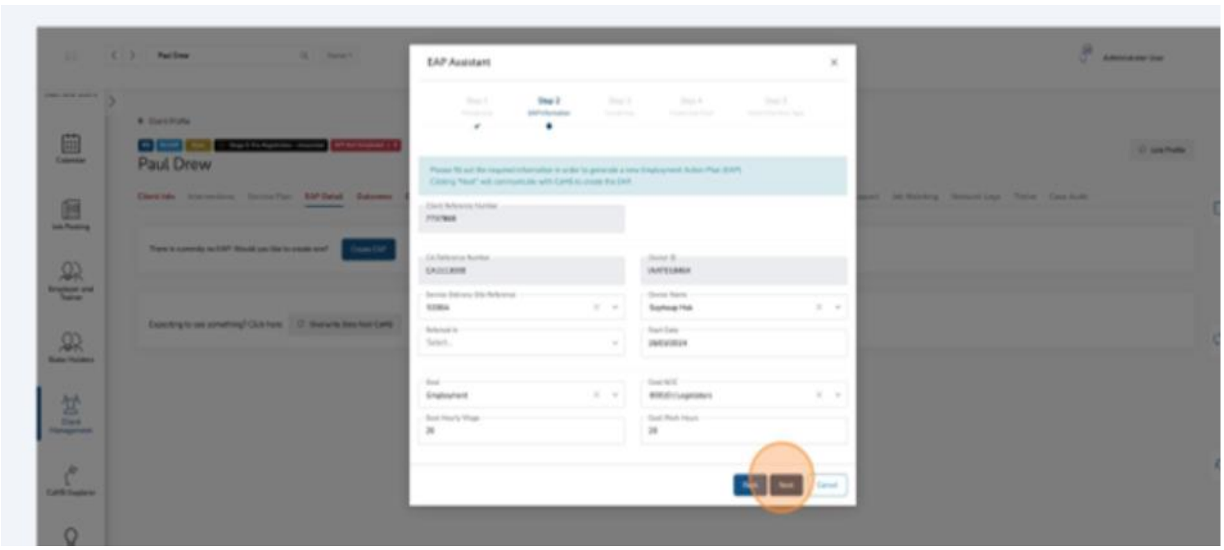


4. Click “Next”.

The EAP Assistant will display a form to complete the details to generate the new Employment Action Plan (EAP).

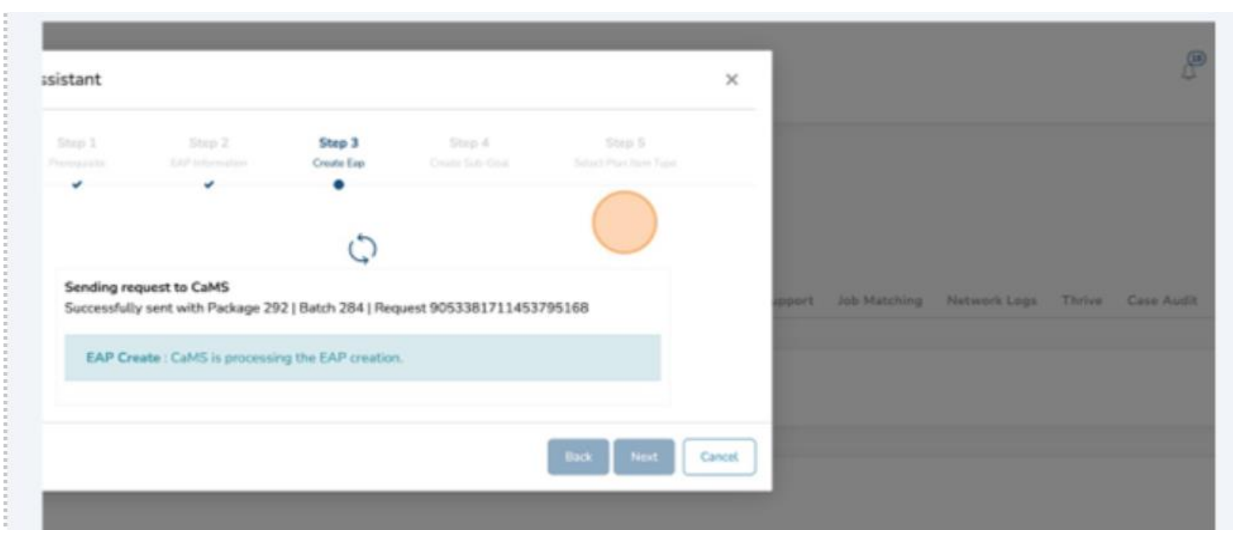
✓ Note: Ensure the Service Delivery Site is entered, or an error message will display.

5. When presented with Common Assessment (CA) details for the client, Click “Next.”



The EAP Wizard has two stages: Creation of the EAP then adding and activating the EAP with sub-goals and Plan items.

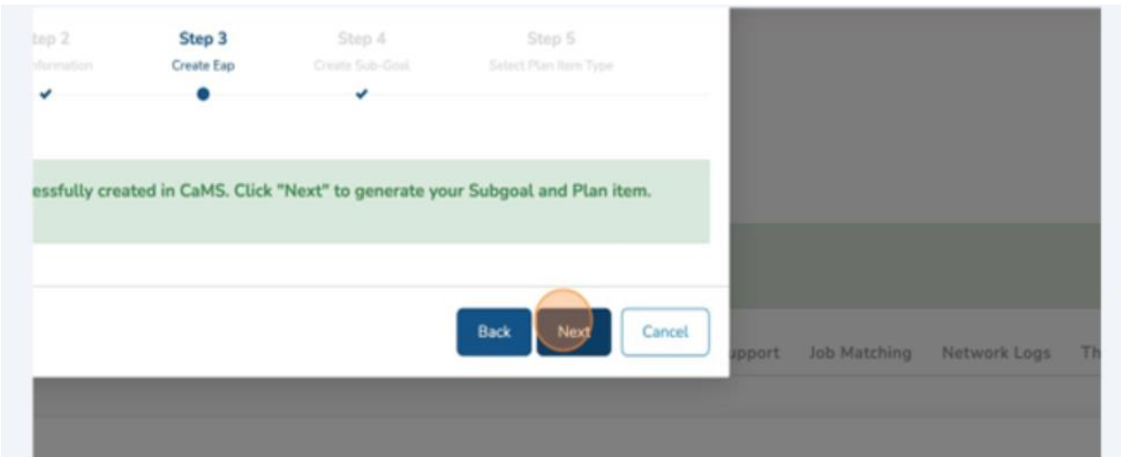
The creation of the EAP will put you in a queue to upload the details into CaMS.



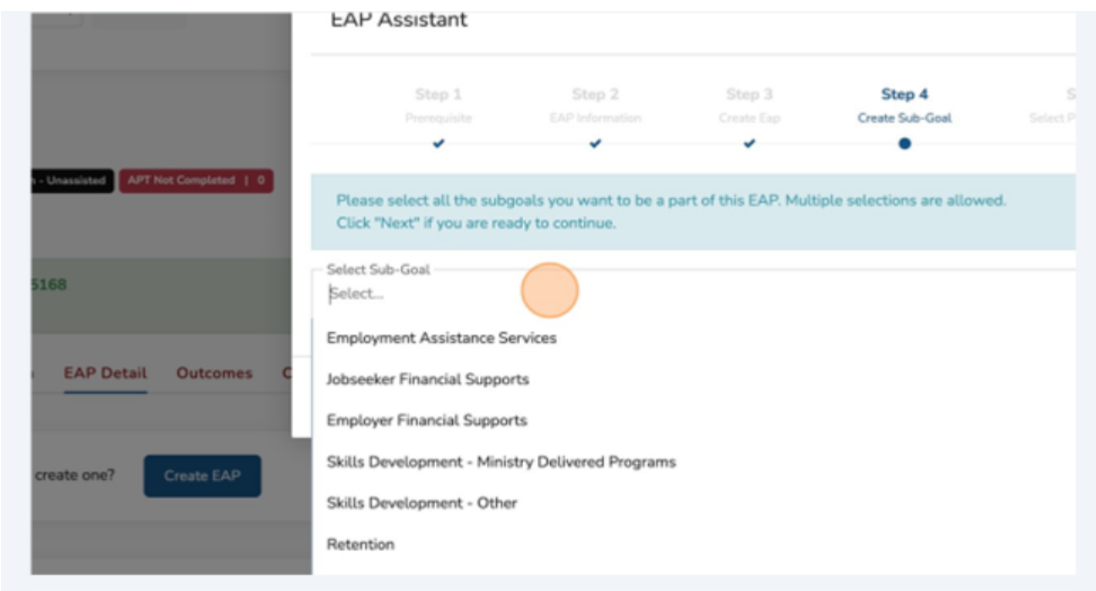
❖ Tip! You can multitask within ESCases while the progress modal is displaying your place in queue by working in another tab.

Once the first phase has completed (EAP number generation), you will be asked to progress forward by adding sub-goals and plan items to the EAP.

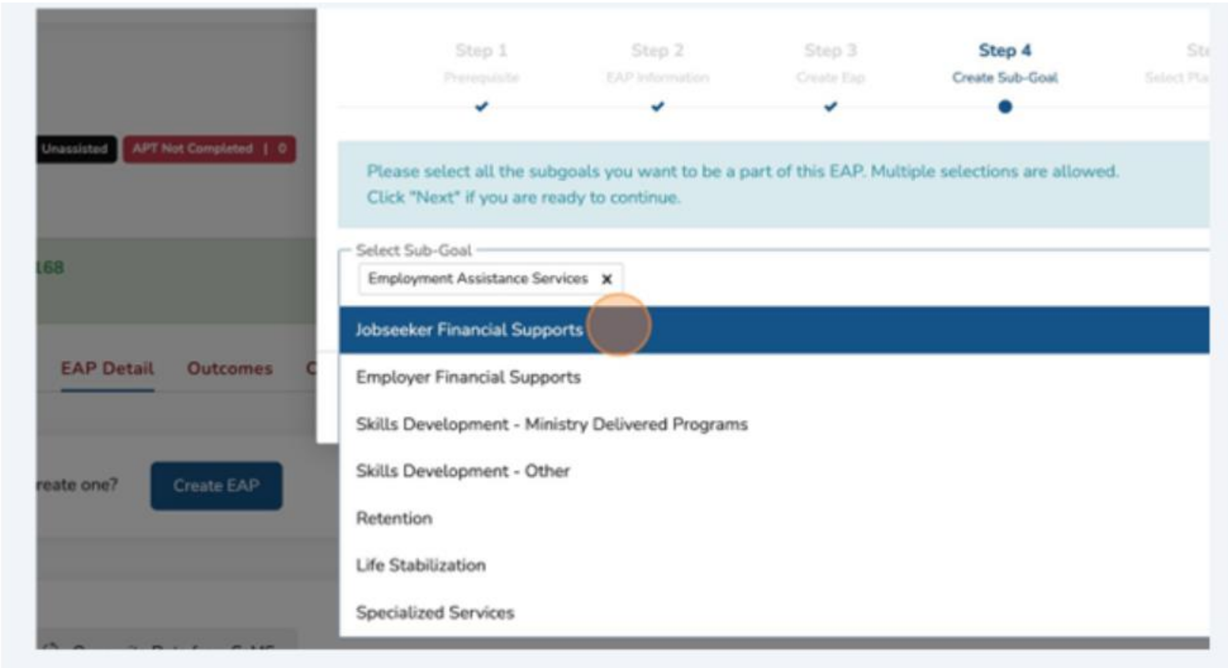
6. Click “Next.”



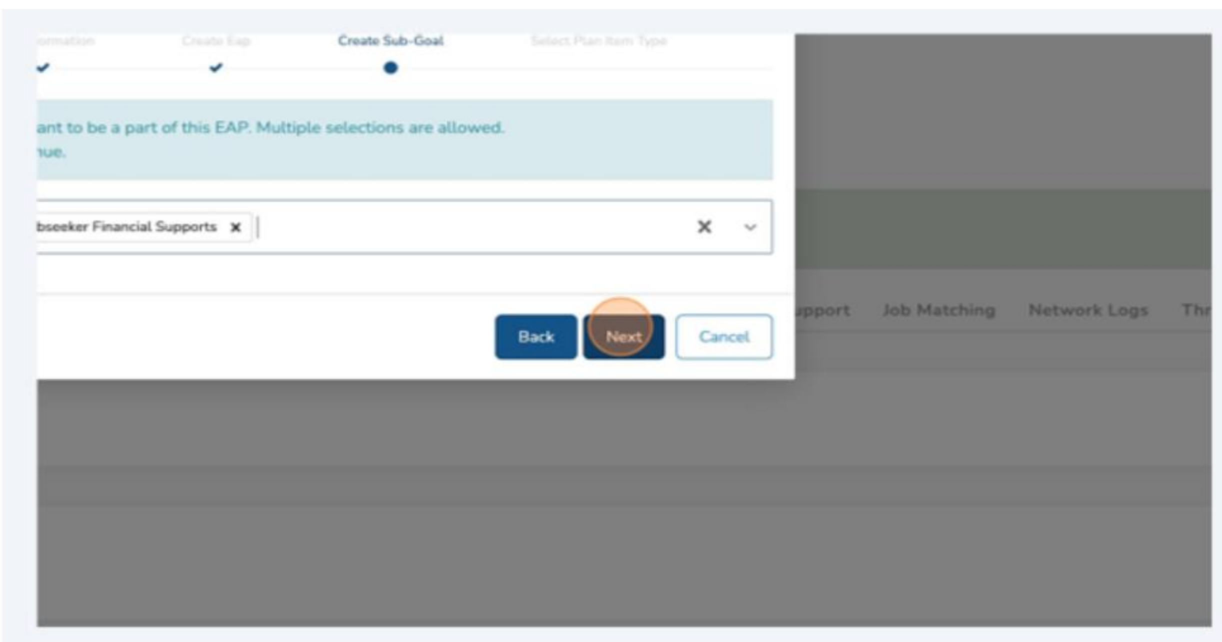
7. Click “Select Sub-Goal."



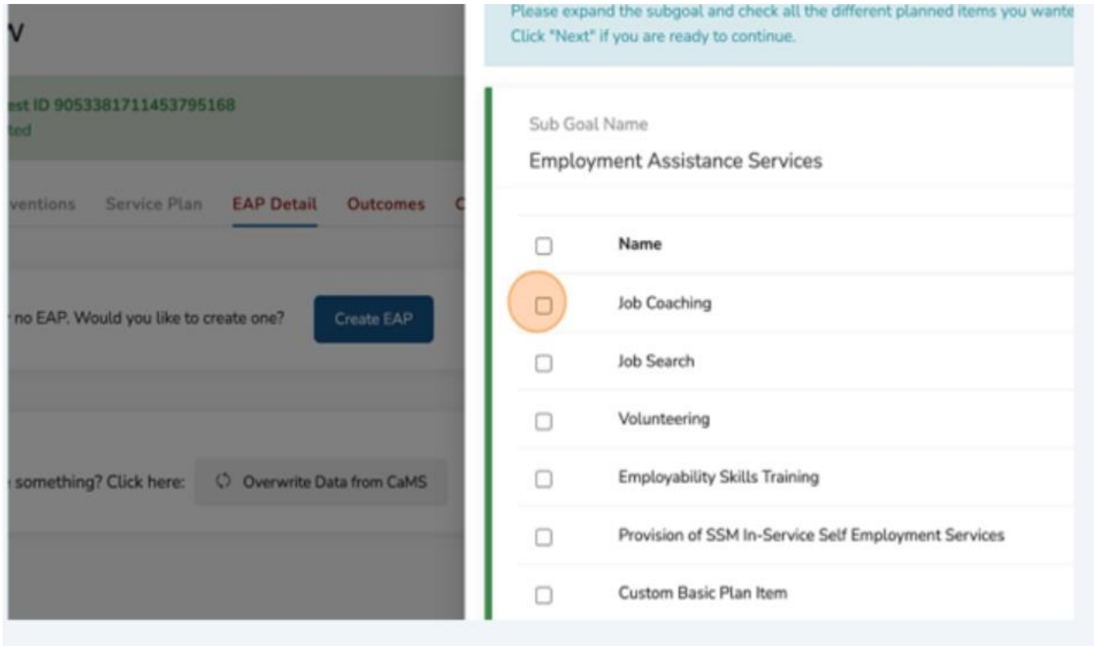
8. You can add multiple sub-goals by selecting them from the “Select Sub-Goal." menu.



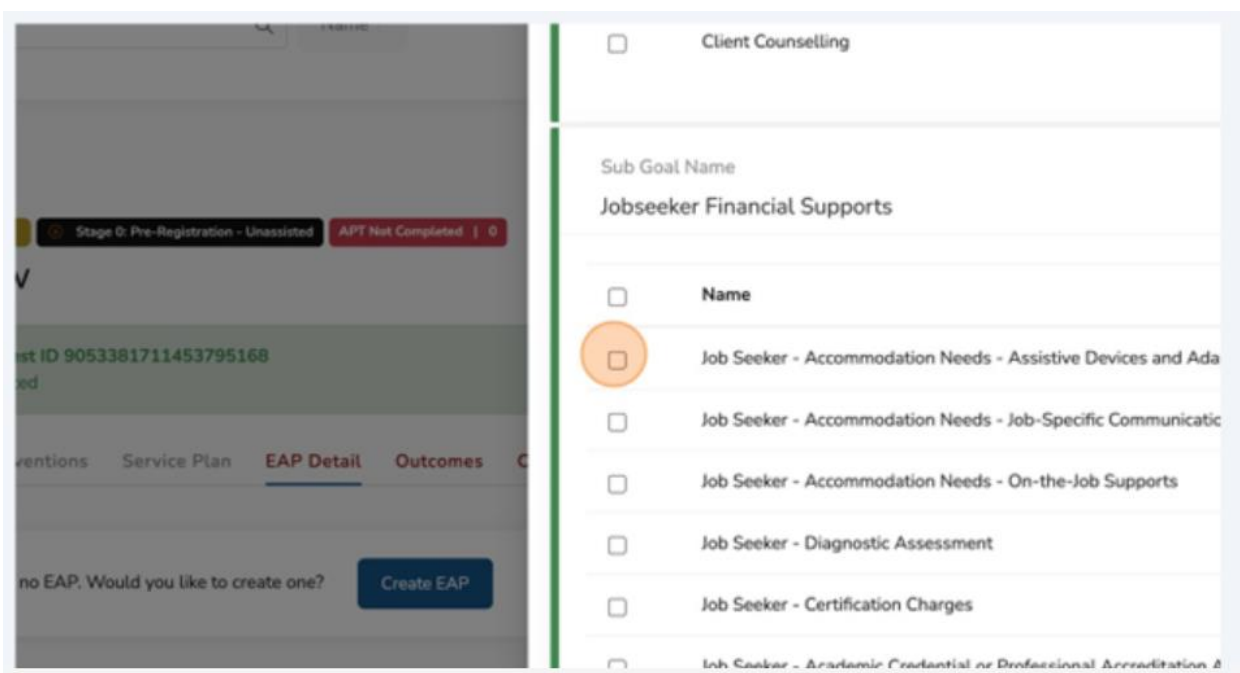
9. When you have selected all your sub-goals, click “Next.”



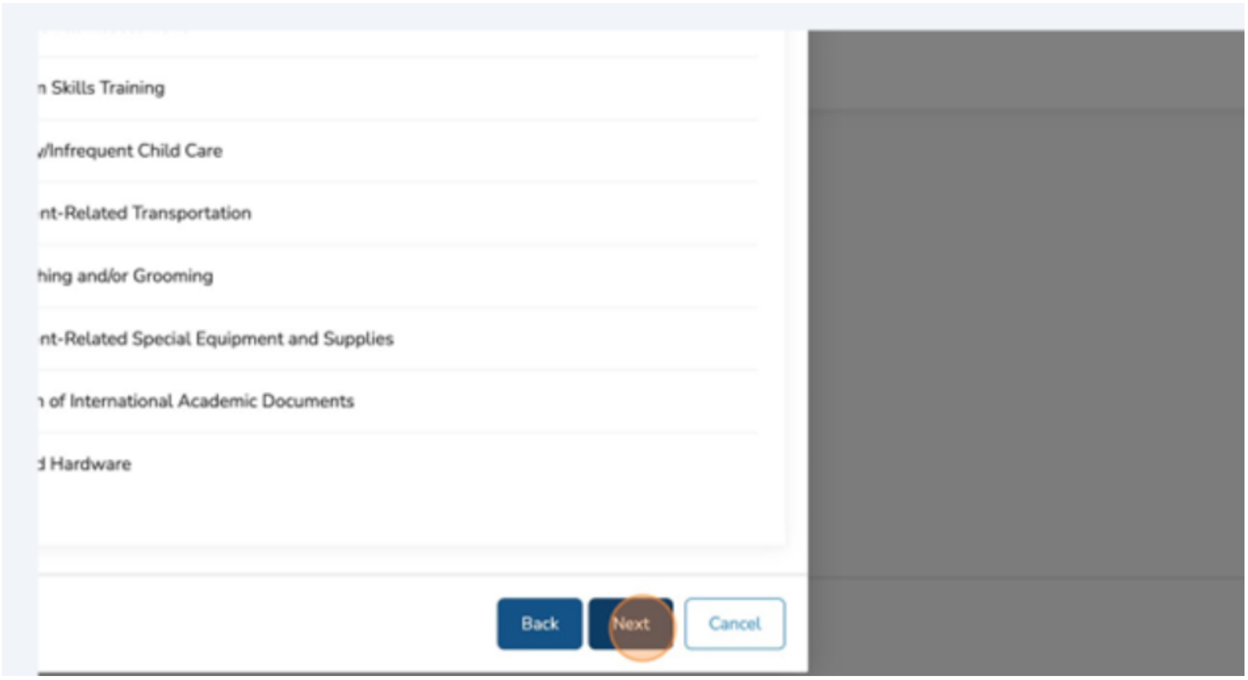
10. Select the “Planned Items” from the sub-goals you want to add.



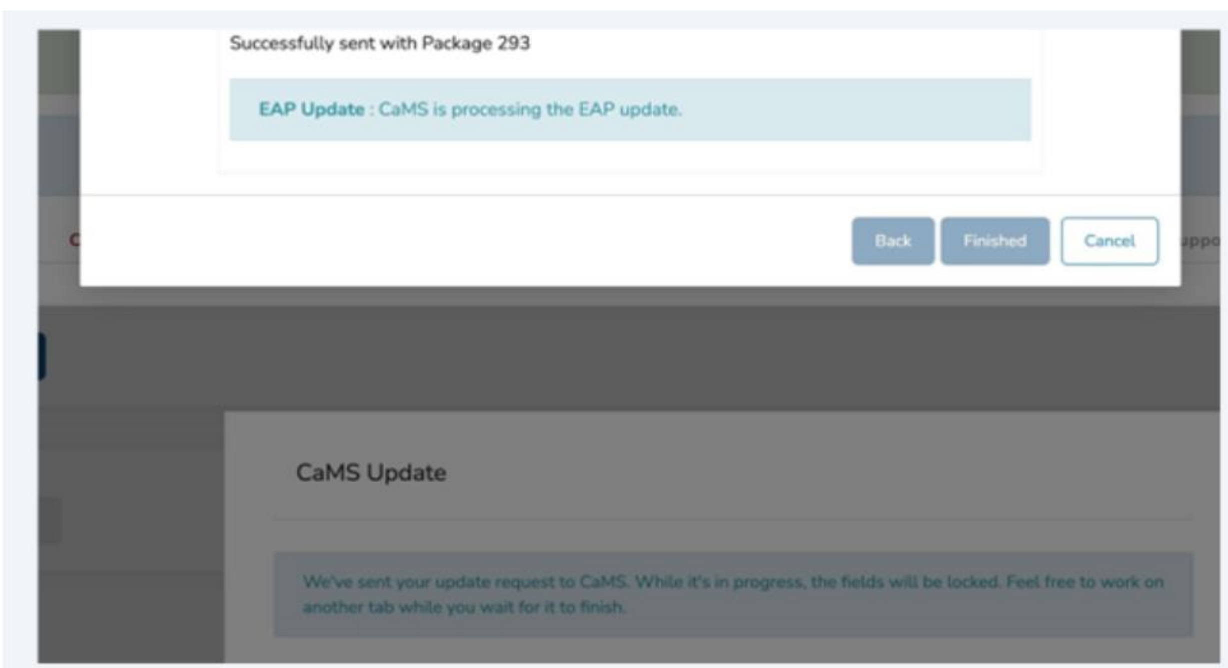
11. Multiple Planned Items can be selected.



12. When all "Planned Items" have been selected, Click "Next."

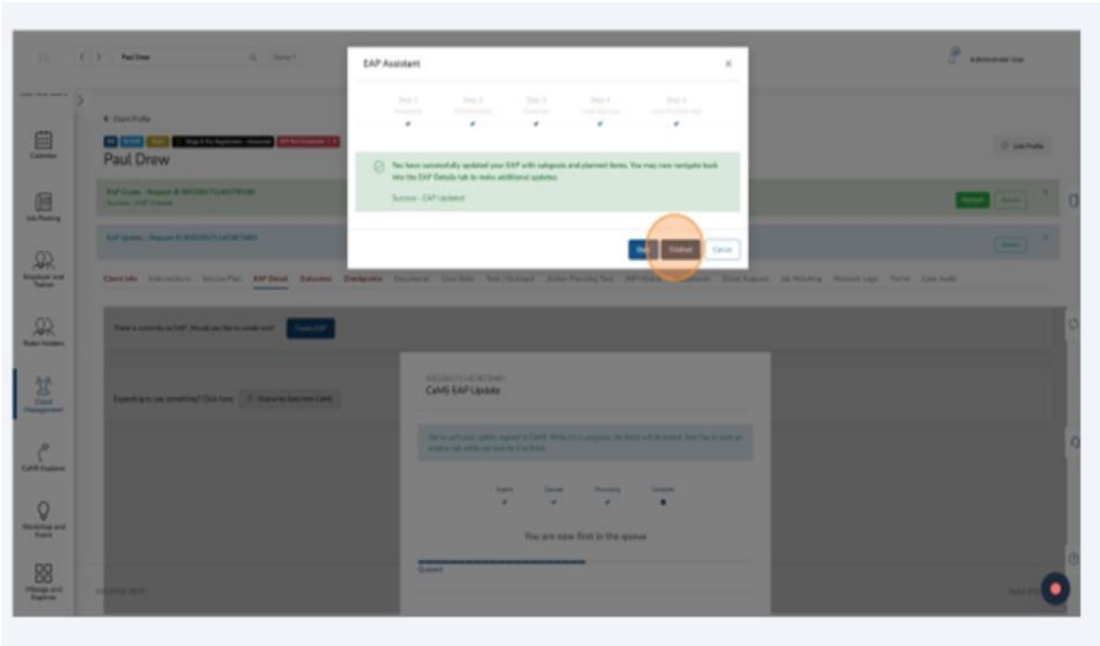


The EAP status will update to "Active" when the EAP Assistant is completed.

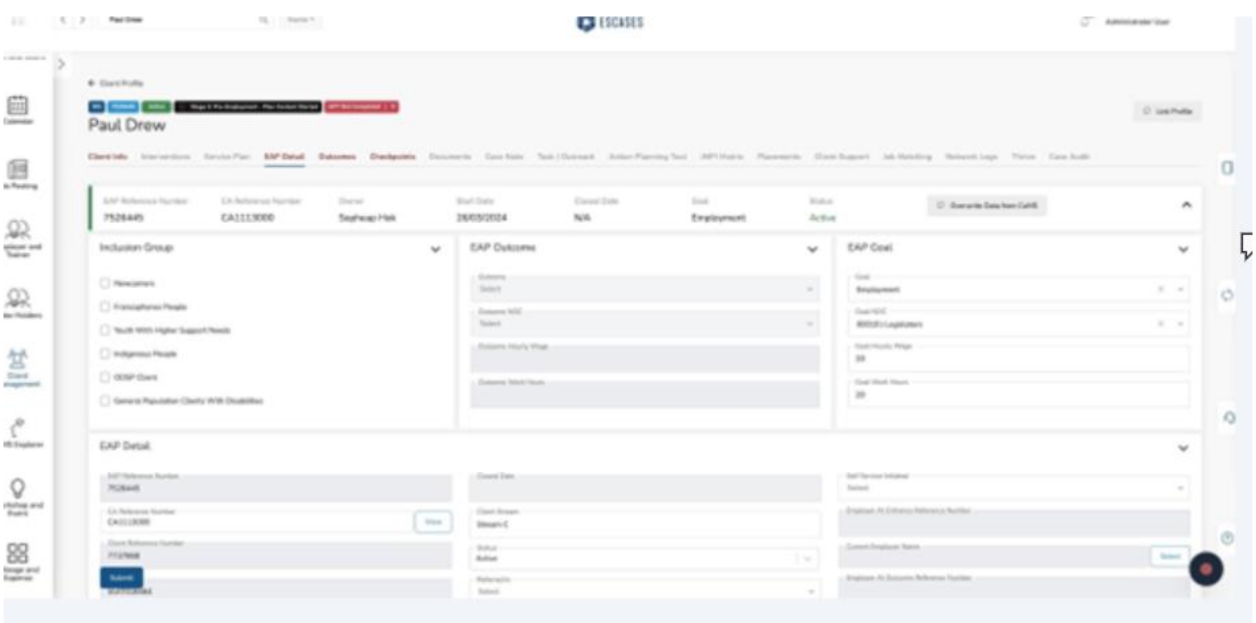


Once the EAP Assistant has been completed, a success notification will display.

13. Click “Finished” to exit the Assistant and your screen will refresh the EAP details.



An active EAP with Sub-goals and Plan Items has been successfully created.

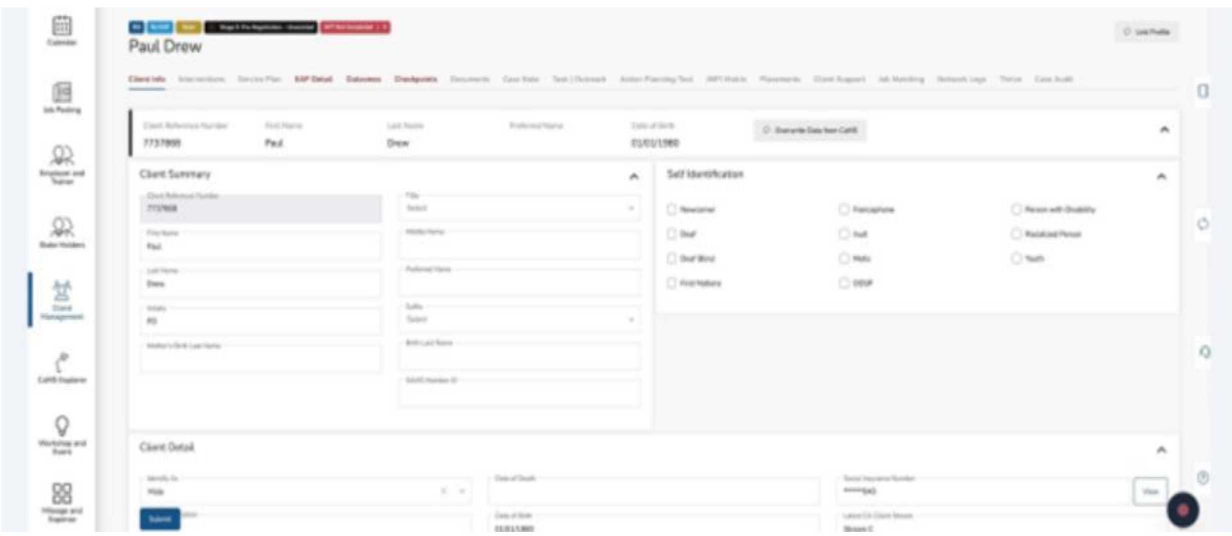


(13) Upload a Document and Complete a Financial Support Planned Item

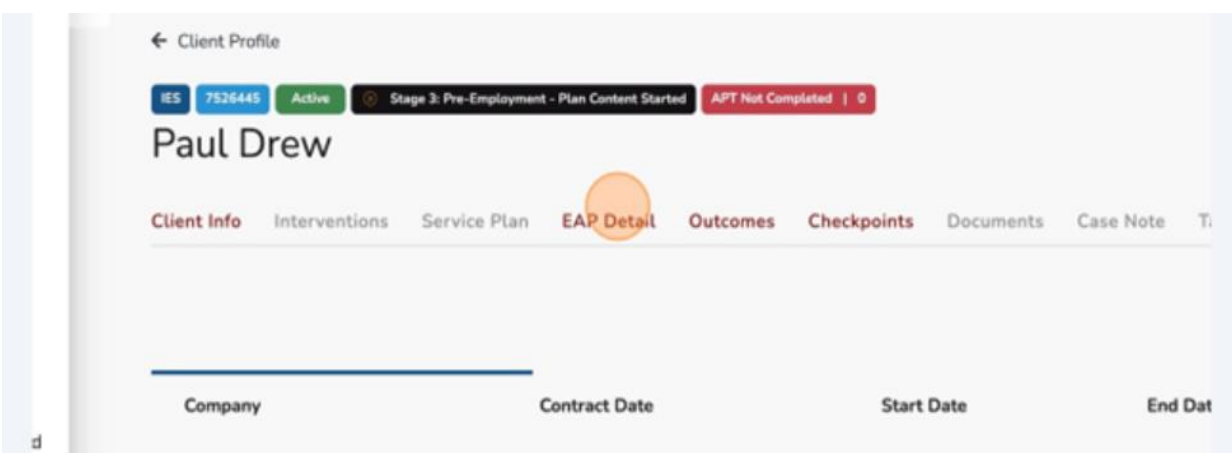
Uploading an attachment to a Financial Support

✓ Note: To upload documents to Cams, ensure the plan item details were submitted by clicking the "Submit" button. After a successful submission, a cloud icon will appear on the right side of the plan item, allowing you to upload relevant attachments to CaMS.

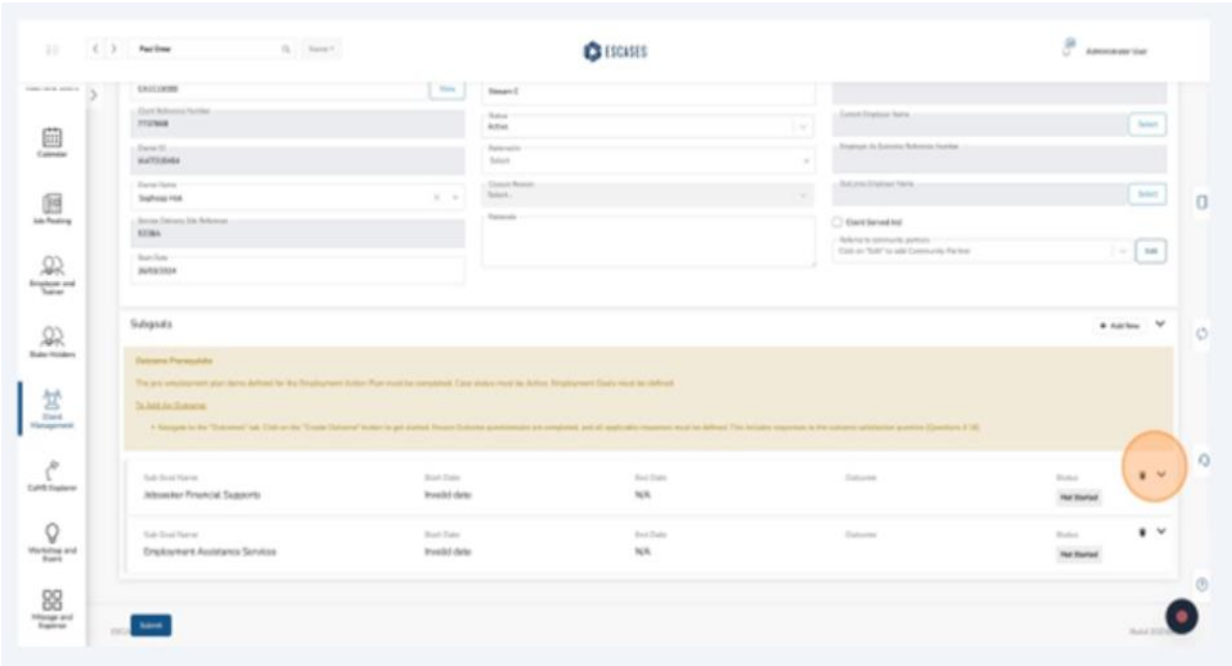
1. Navigate to the client profile.



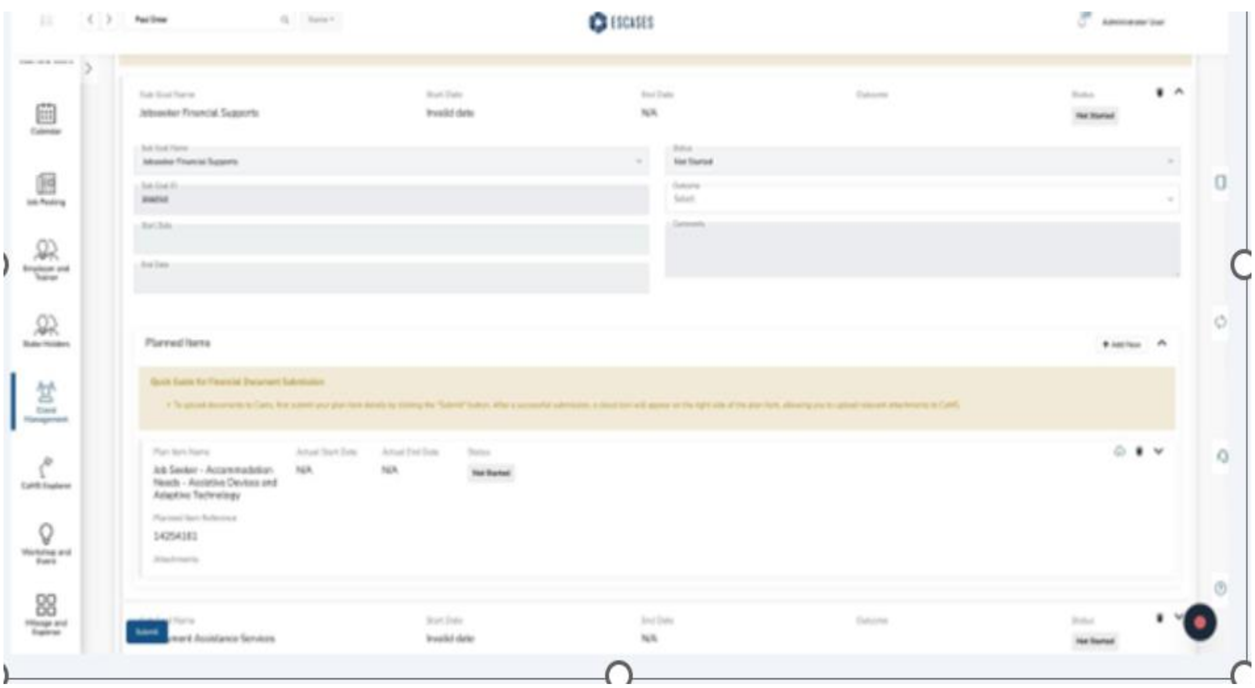
2. Click “EAP Detail.”



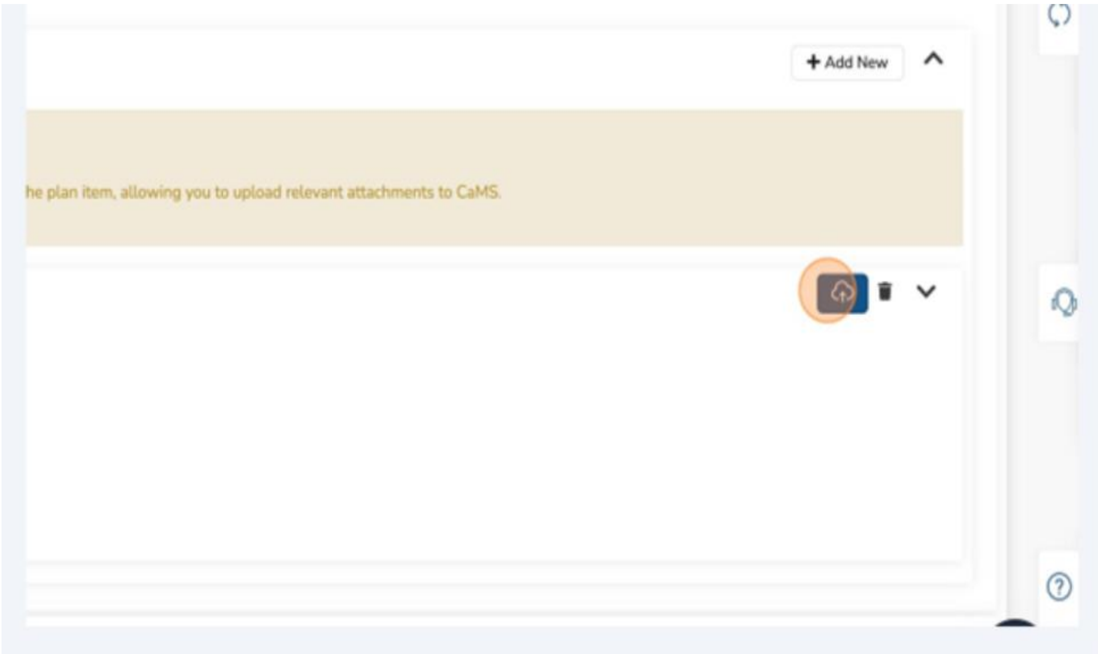
3. Locate the Sub-goal with Planned Item that you need to upload a document to. Click the chevron to expand the Sub-Goal.



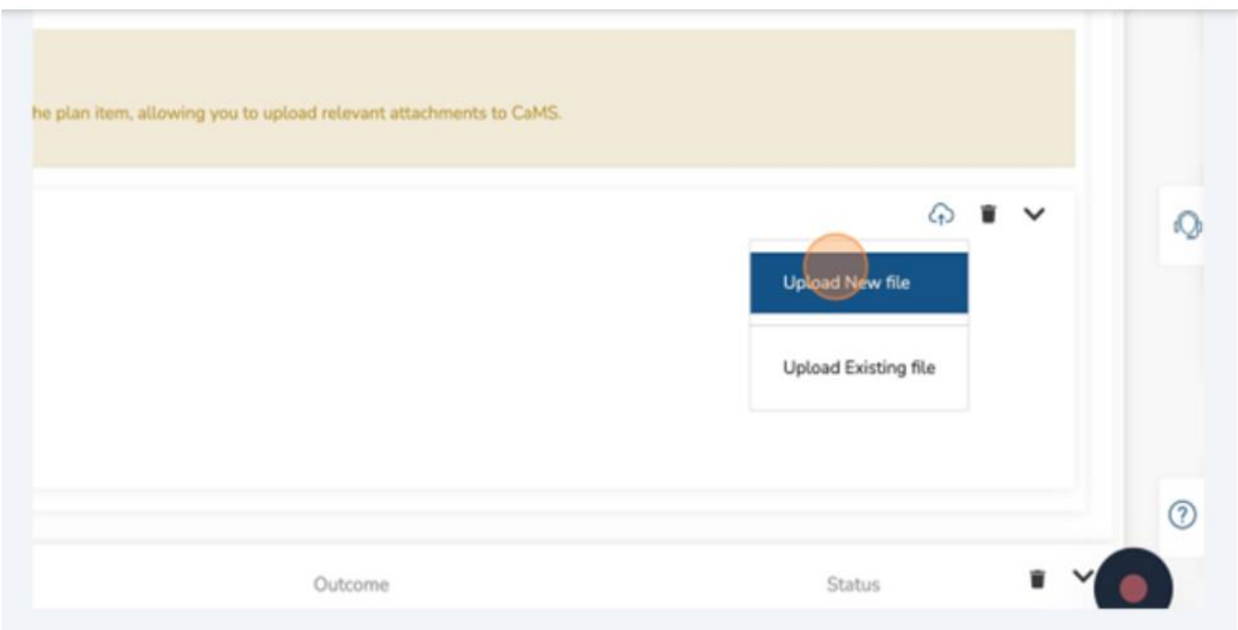
4. The “Cloud” icon will display once the Planned Item is exposed.



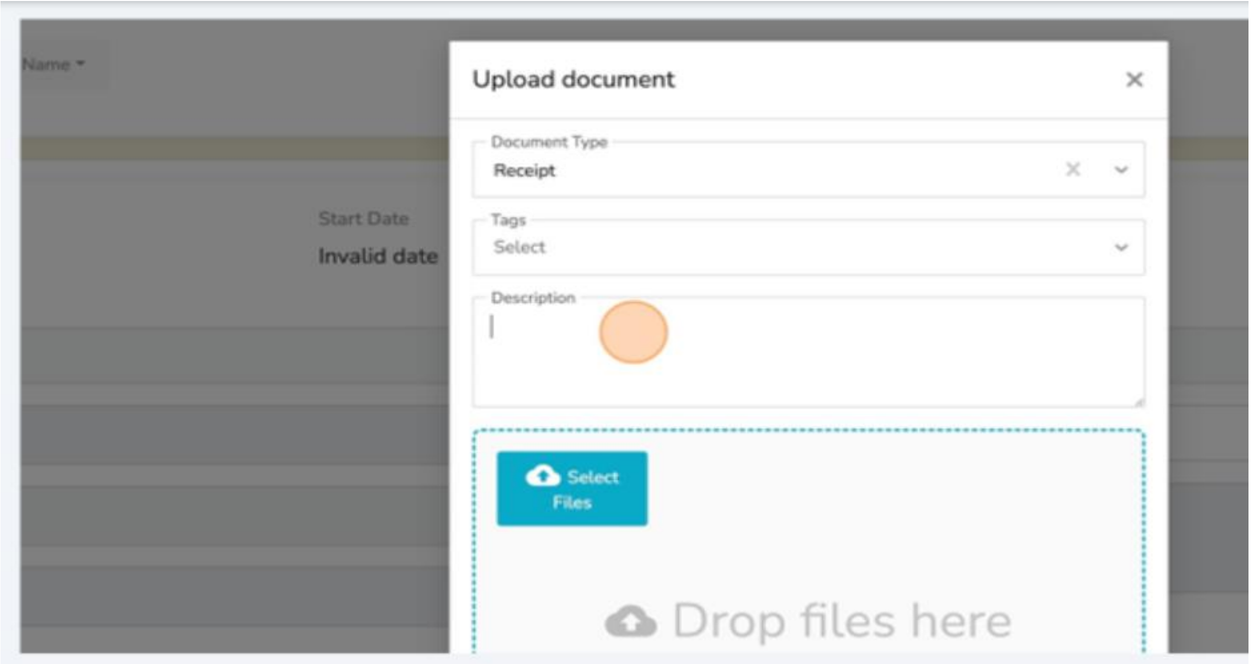
5. Click the “Cloud” icon to begin the process of attaching the required Planned Item document.



6. Click “Upload New File.”



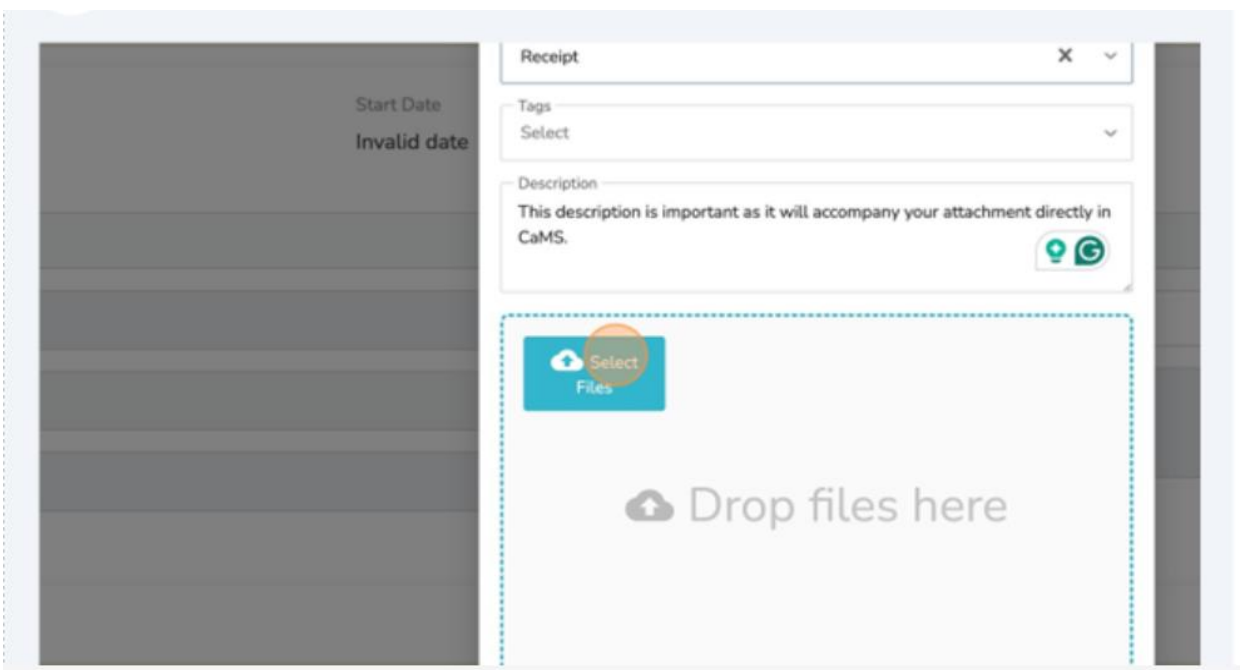
7. Click on the “Description” field.



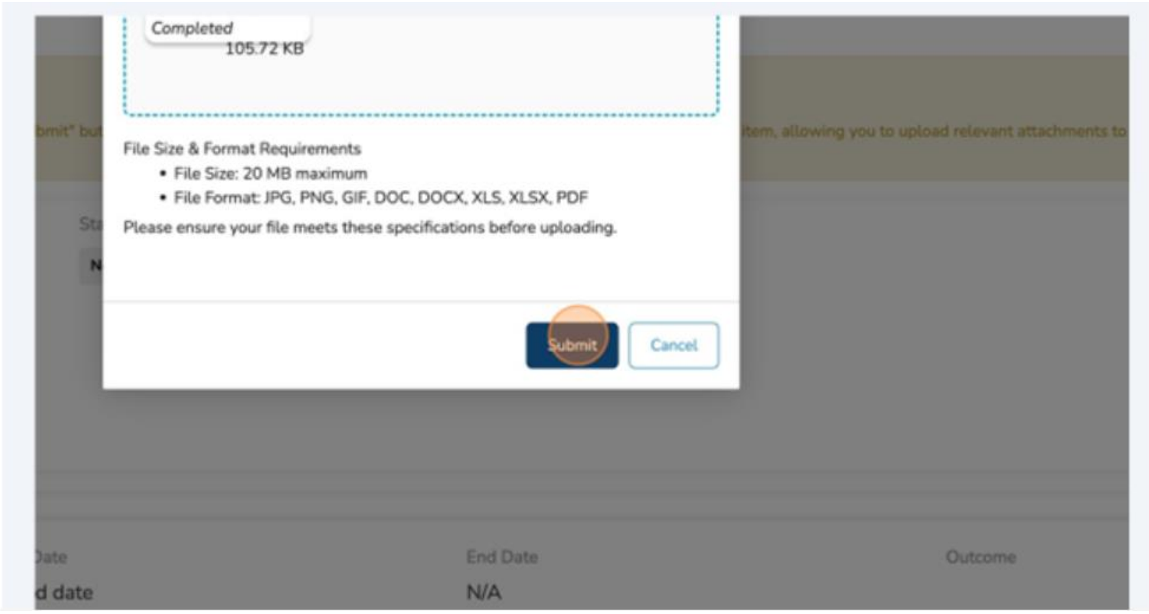
8. Insert the description for this attachment.

❖ Tip! The description is extremely important as it will accompany your attachment directly to CaMS.

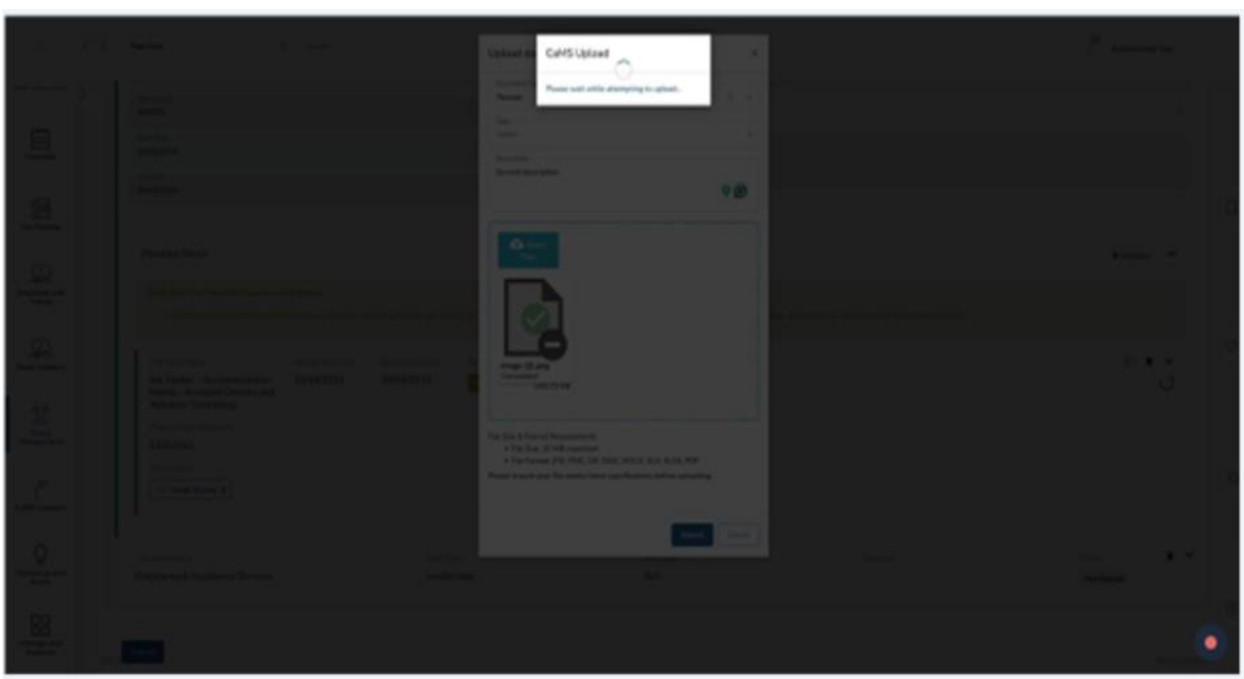
9. Click “Select Files” and choose the attachment for this planned item.



10. Click “Submit.”

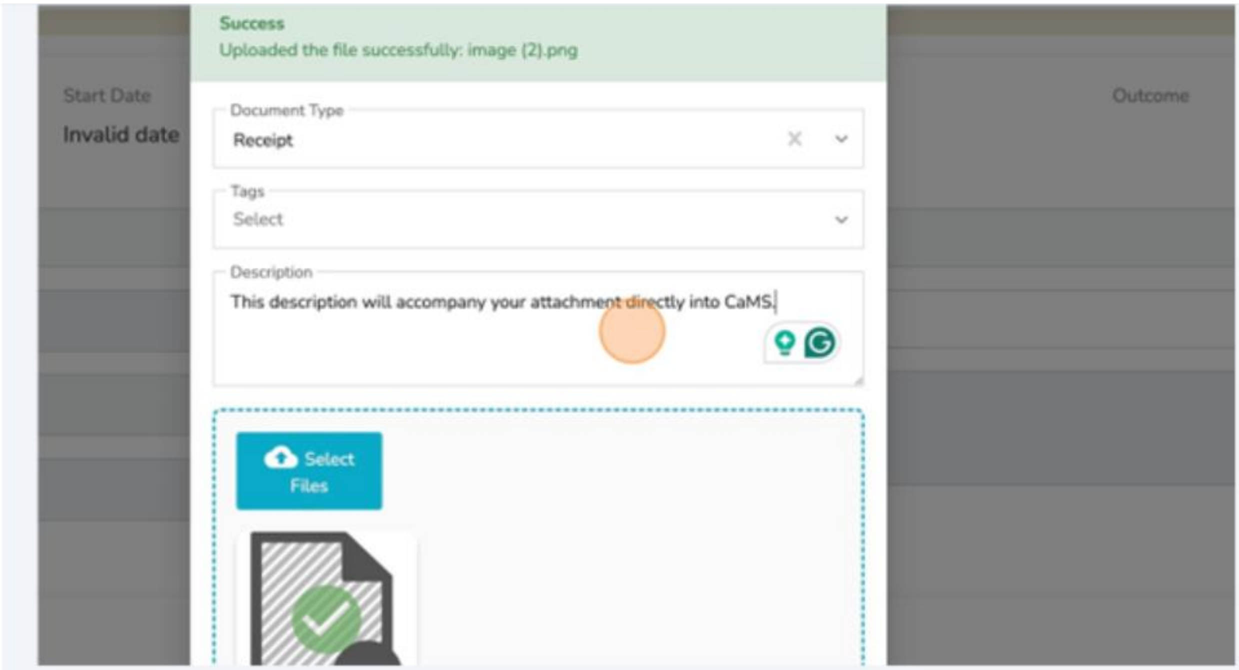


When the CaMS Upload begins, the entire screen focus will highlight the action.

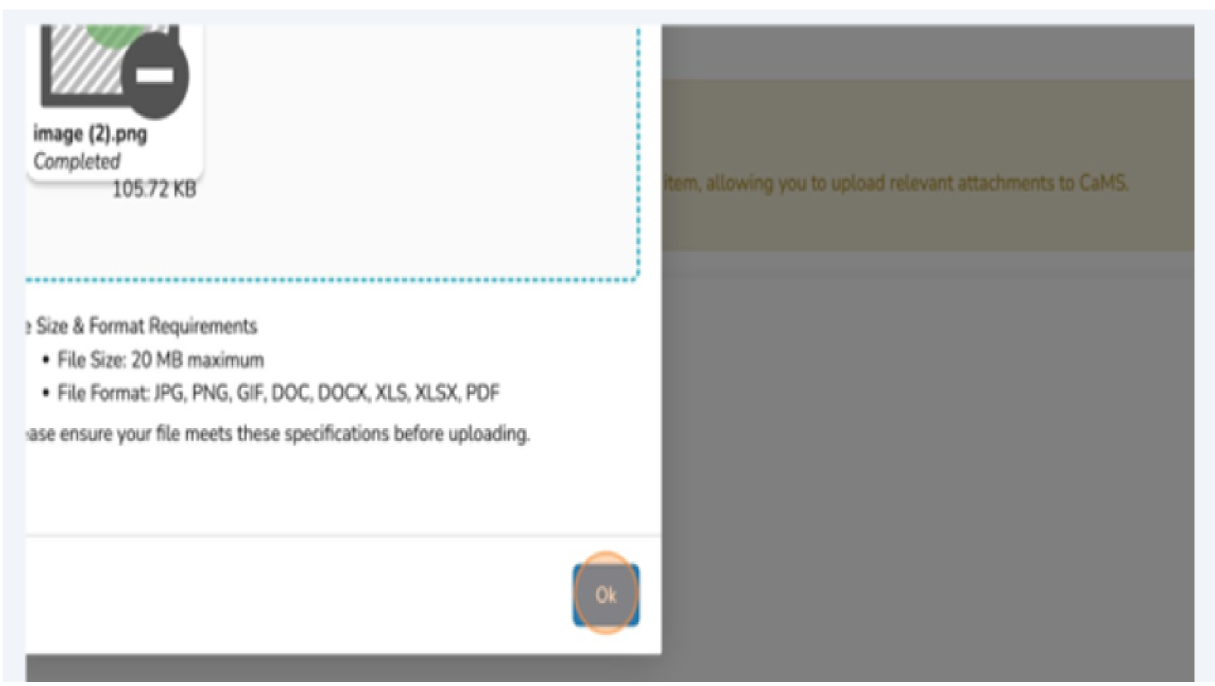


- Alert! While the upload is occurring directly into CaMS, the screen will display a primary focus on this action to signify the importance.

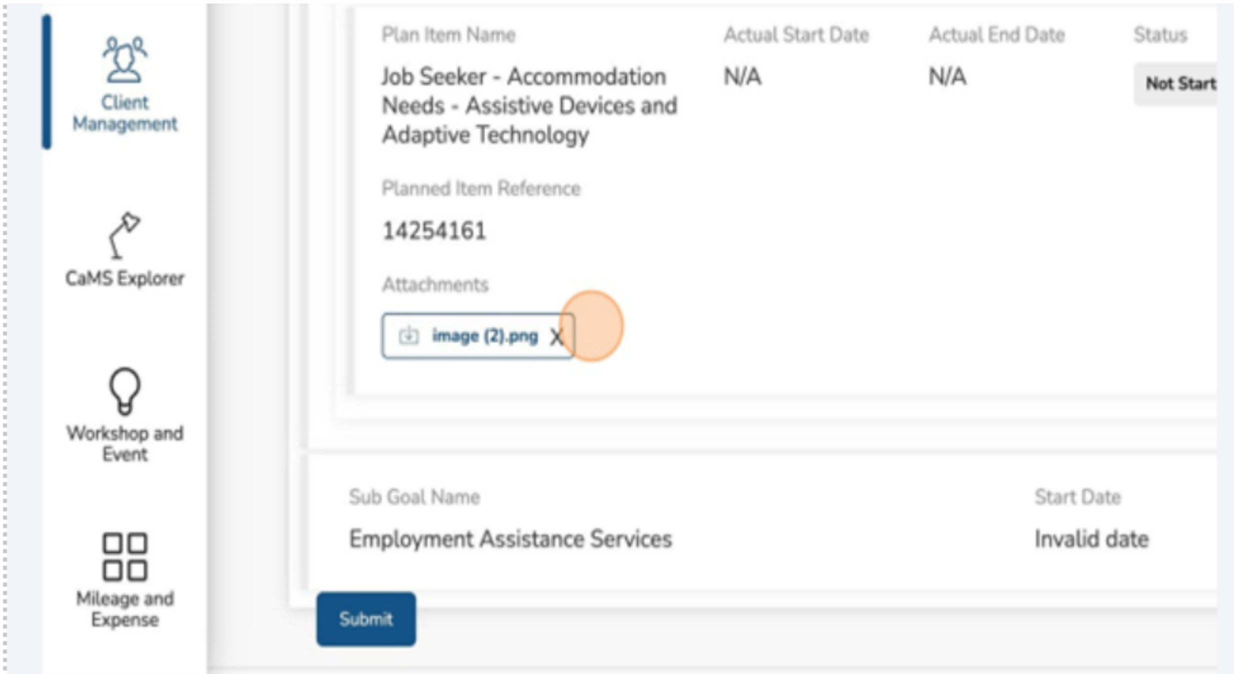
11. A “success” notification will display when the file is uploaded into CaMS.



12. Click “OK.”



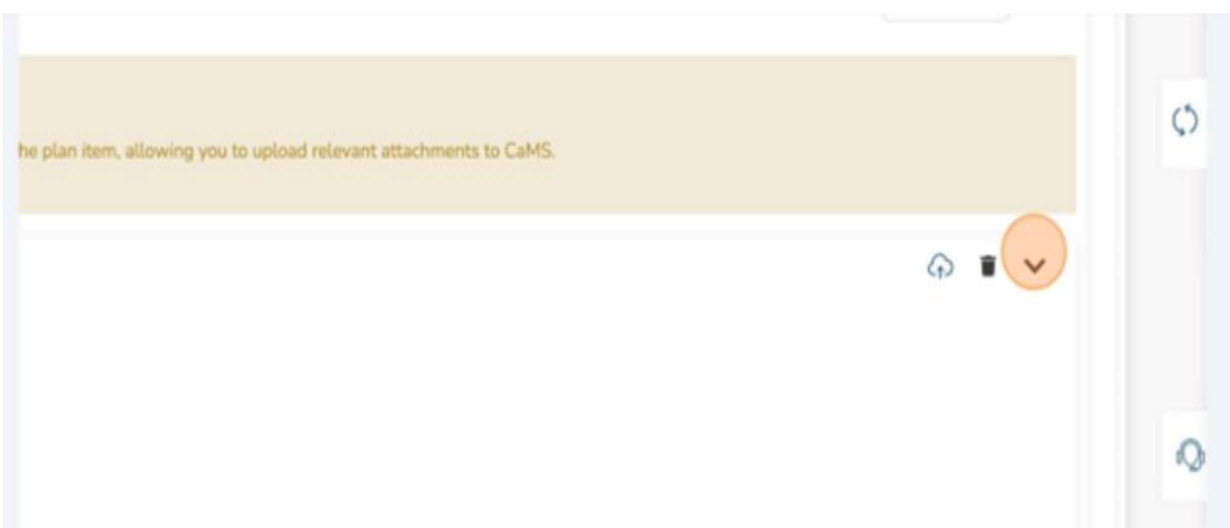
The new attachment can be seen in the Attachments section.



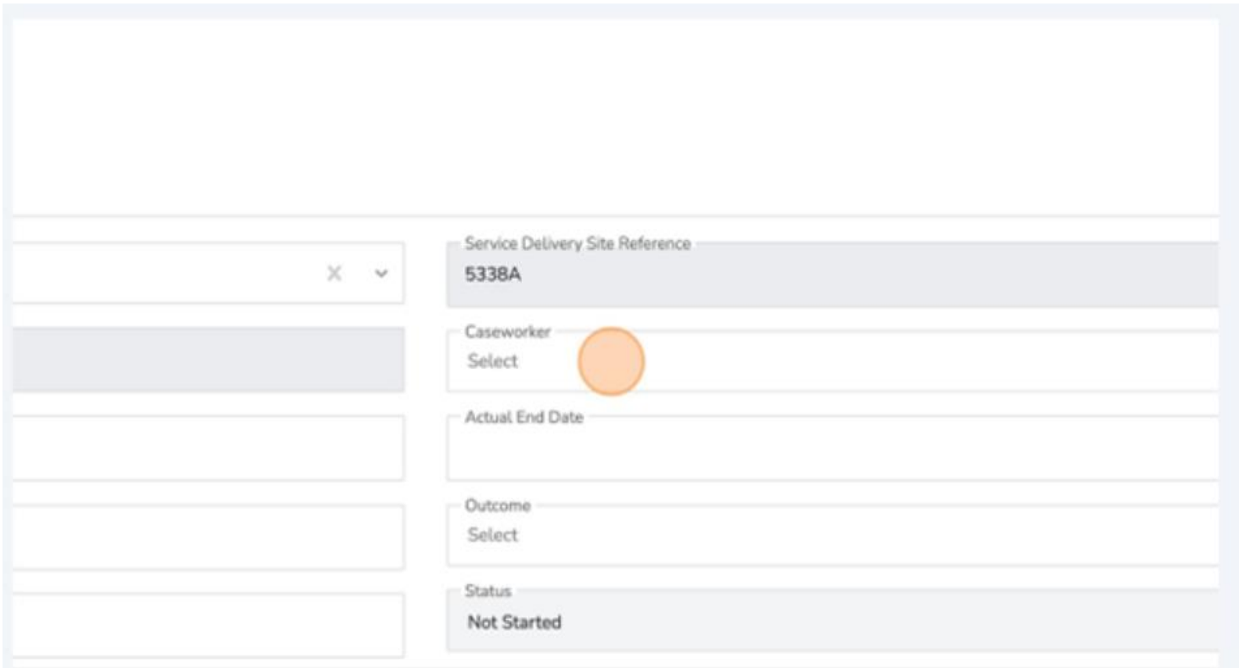
✓ Note: To see the details, click the attachment link.

Completing the Financial Support Submission

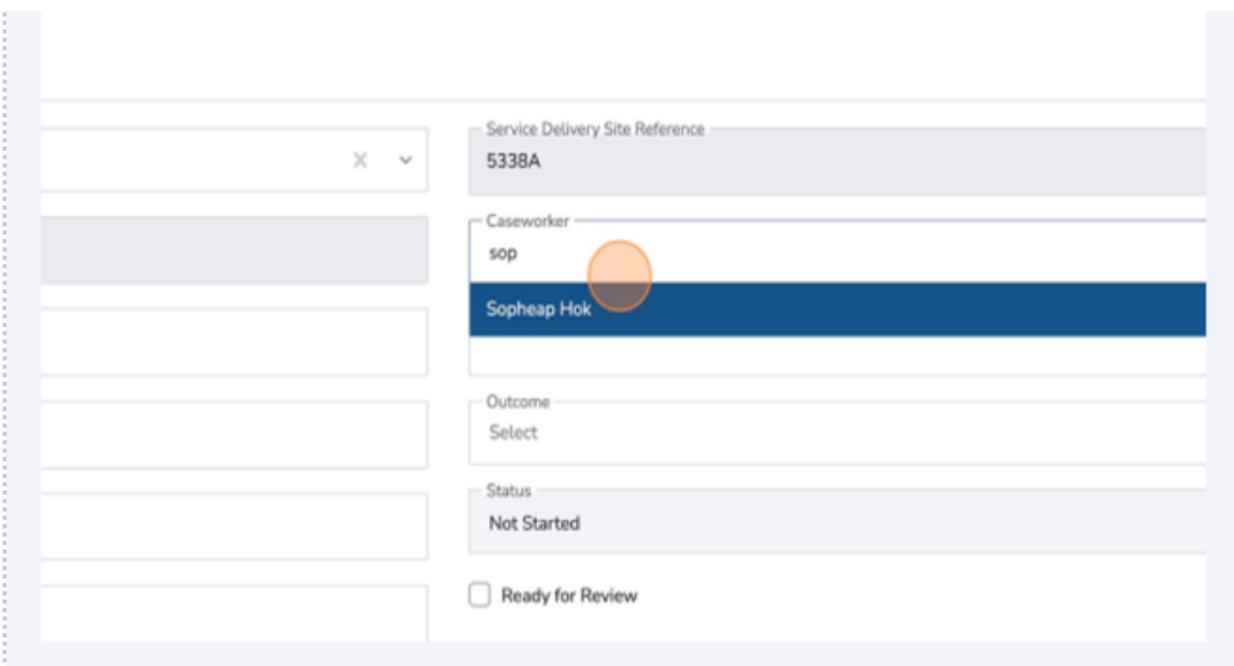
1. Click the chevron to expand the rest of the planned item.



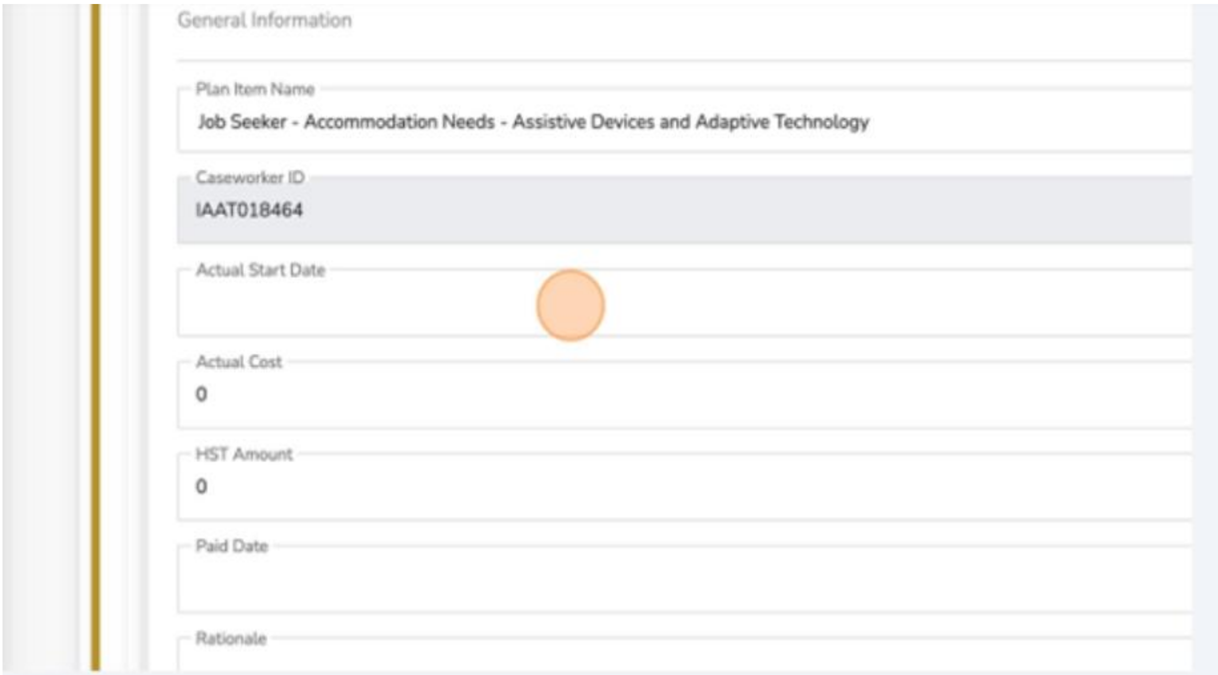
2. Click “Caseworker.”



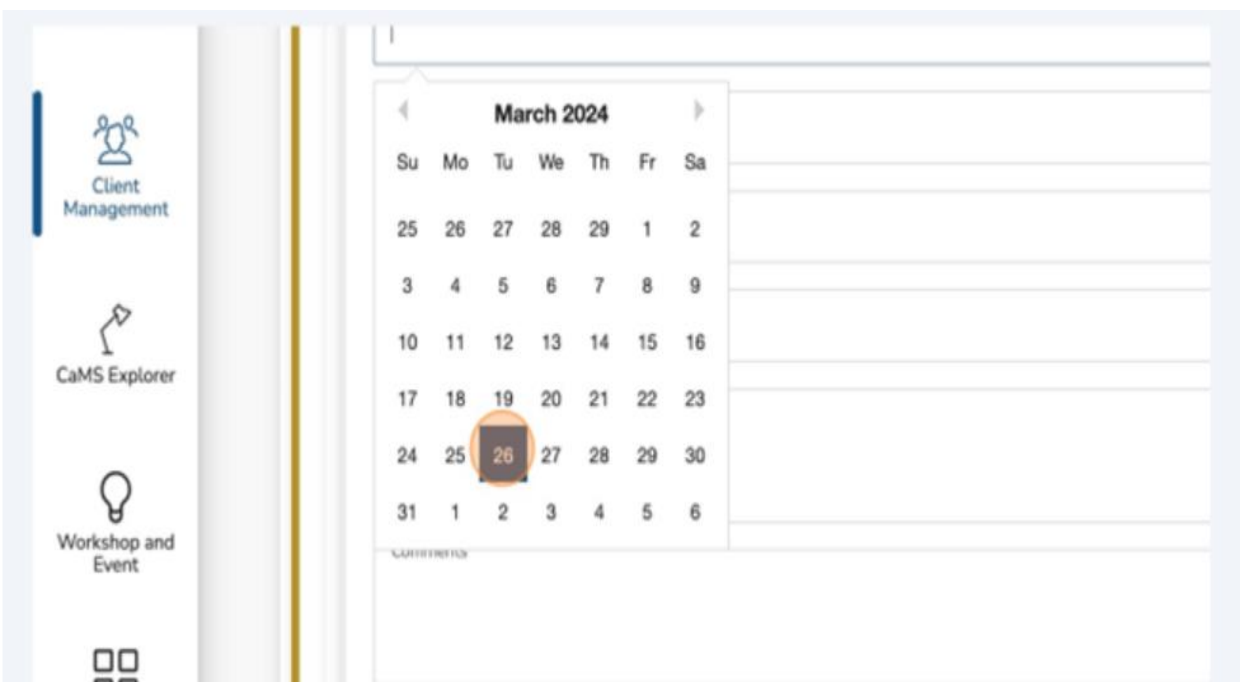
3. Select the appropriate Caseworker.



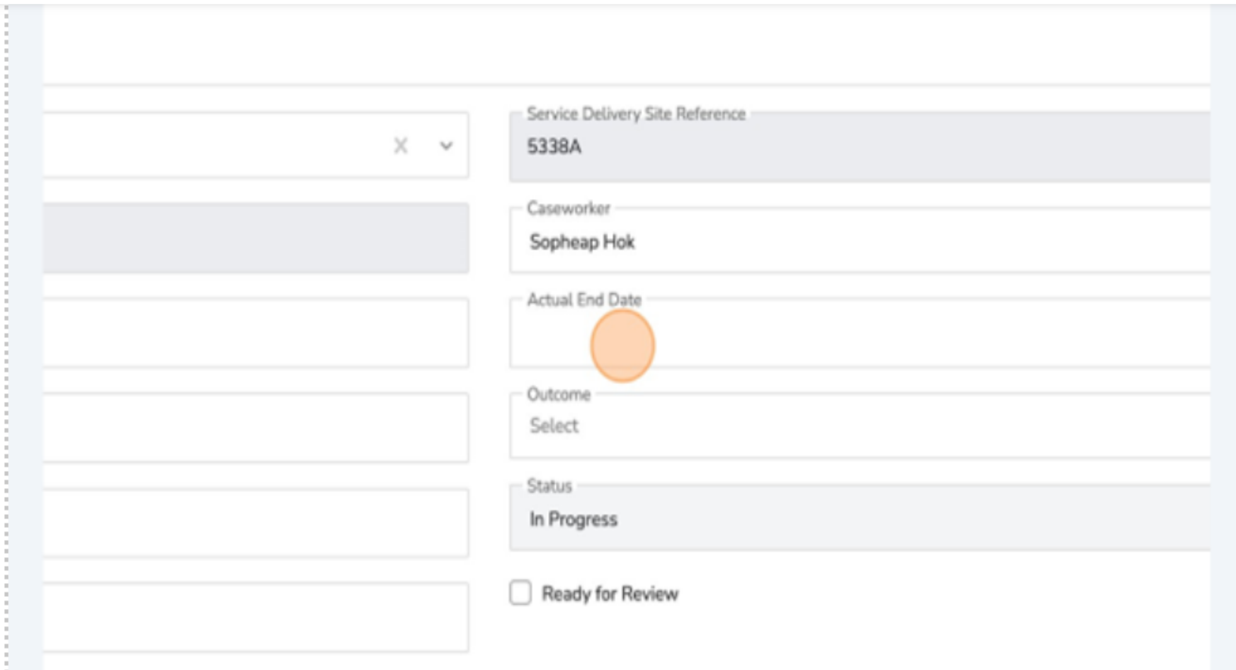
4. Click “Actual Start Date.”



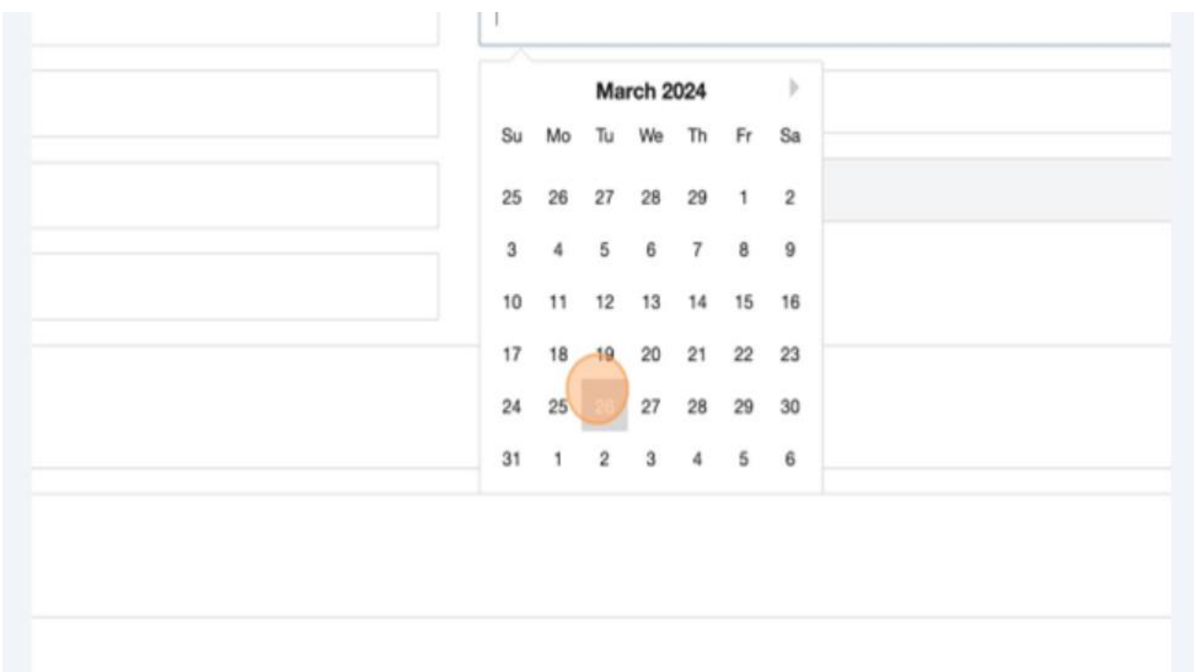
5. Select the appropriate “Start Date.”



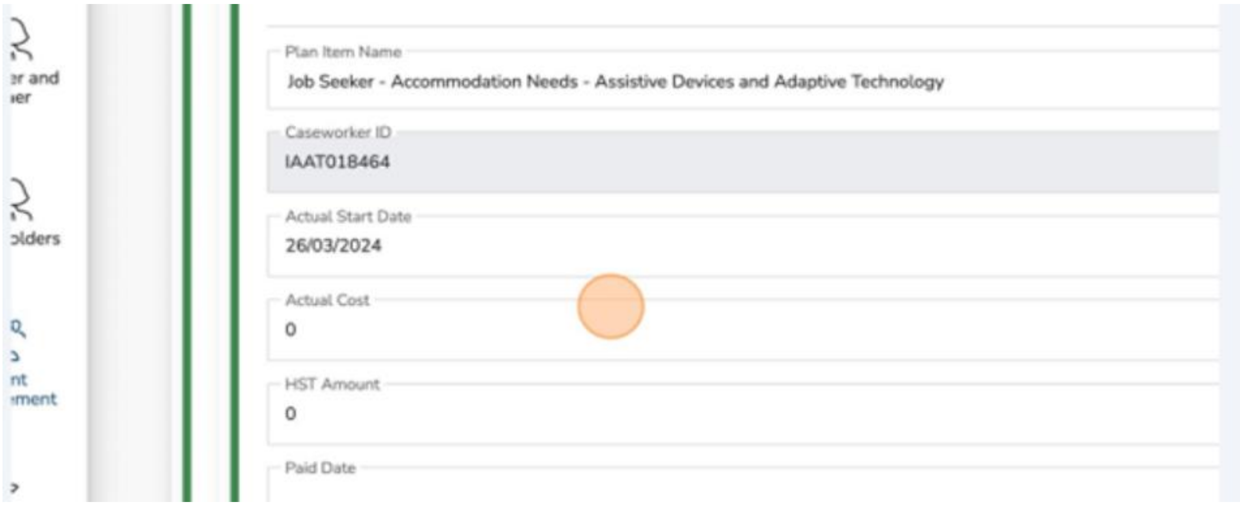
6. Click “Actual End Date.”



7. Select the appropriate “End Date.”



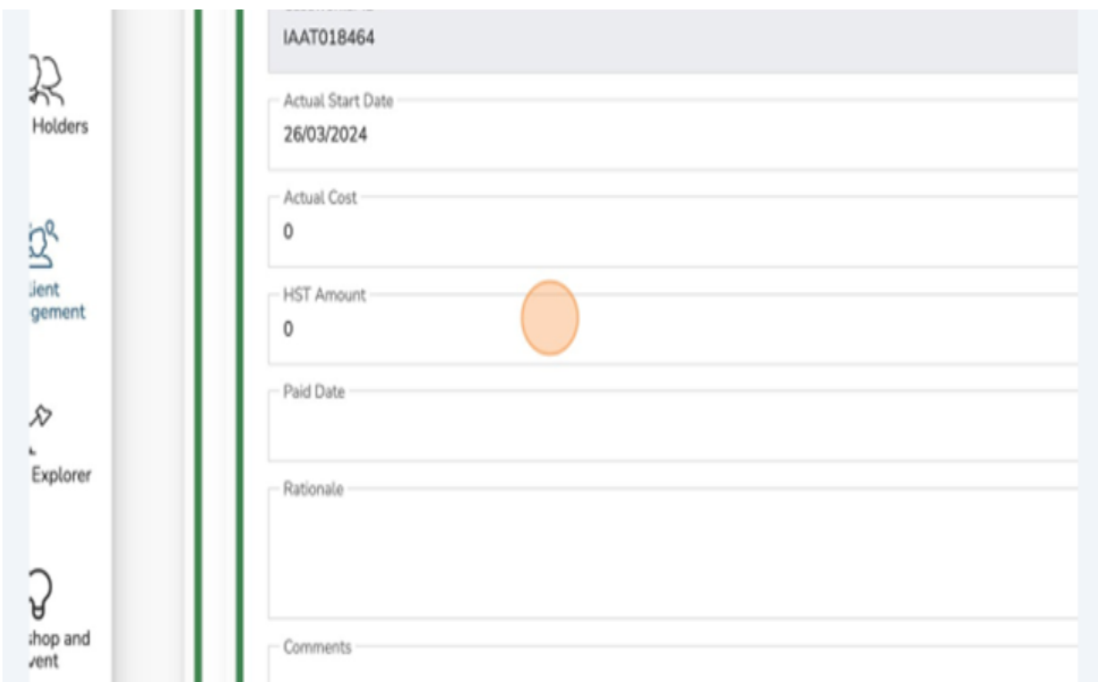
8. Click the “Actual Cost” field.



9. Insert the appropriate cost.

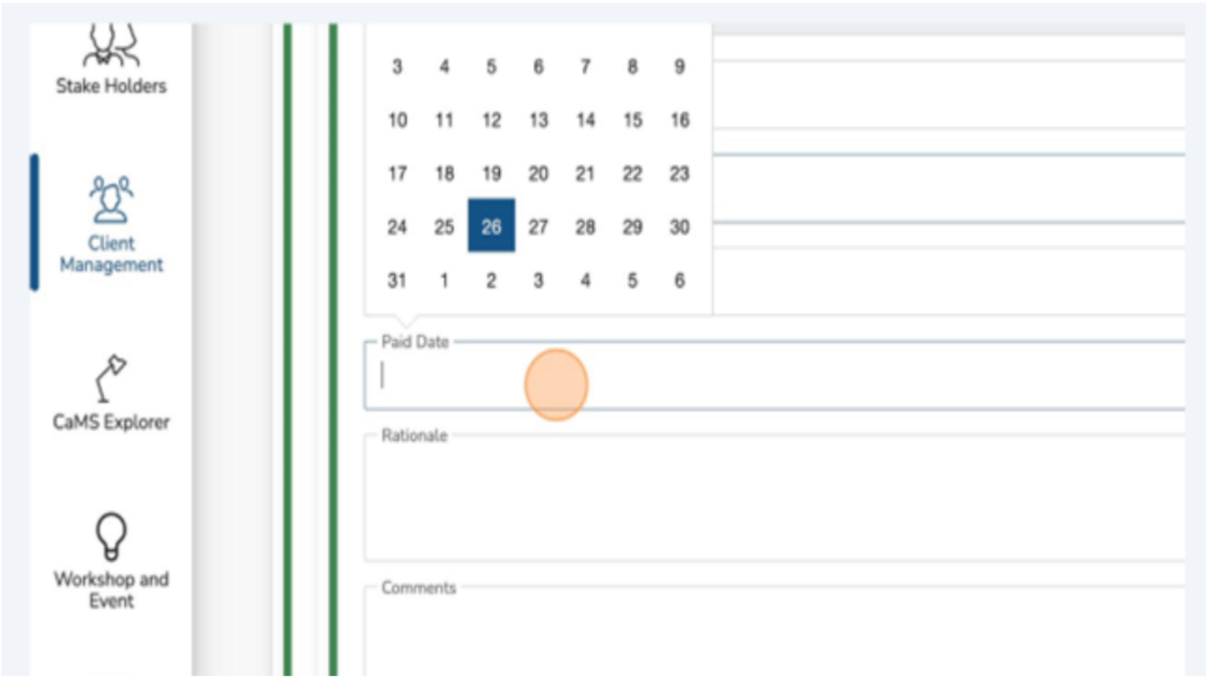
✓ Note: The actual cost is the total cost of the item, including HST.

10. Click the “HST Amount” field.

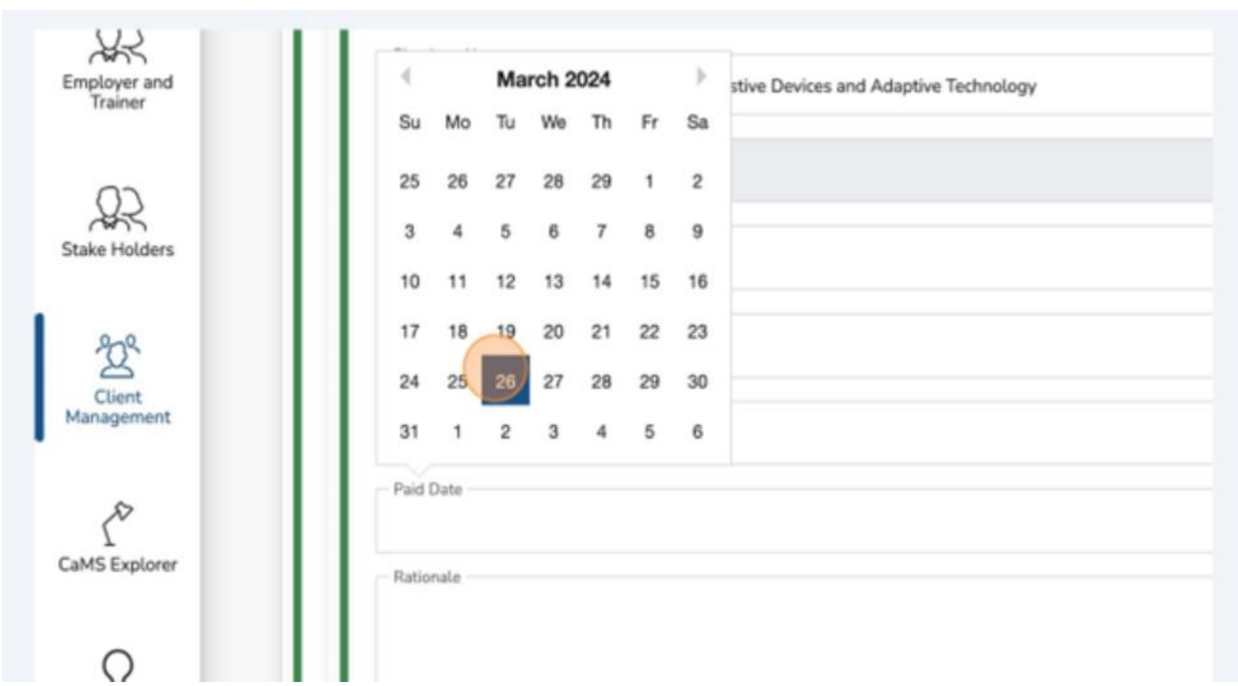


11. Insert the appropriate HST Amount.

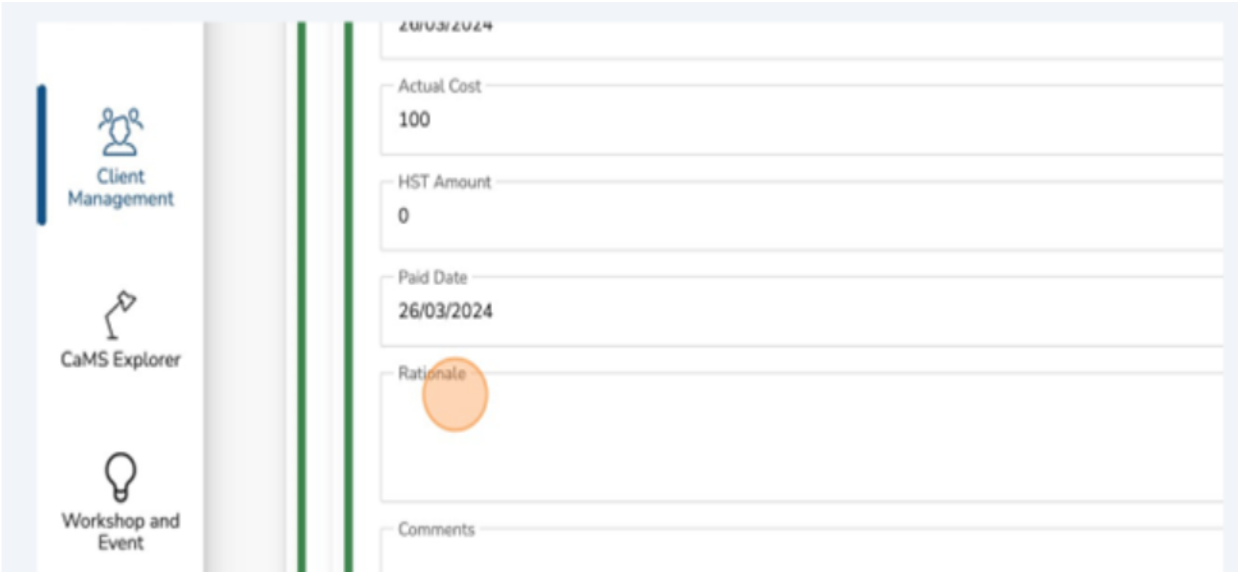
12. Click on the “Paid Date” field.



13. Select the appropriate “Paid Date.”



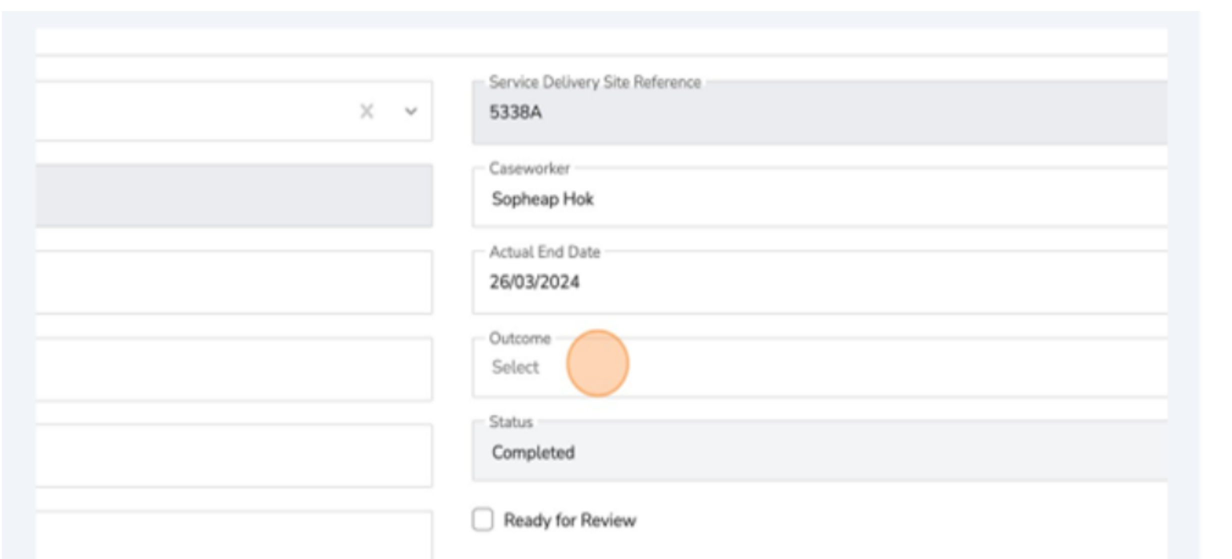
14. Click the “Rationale Field.”



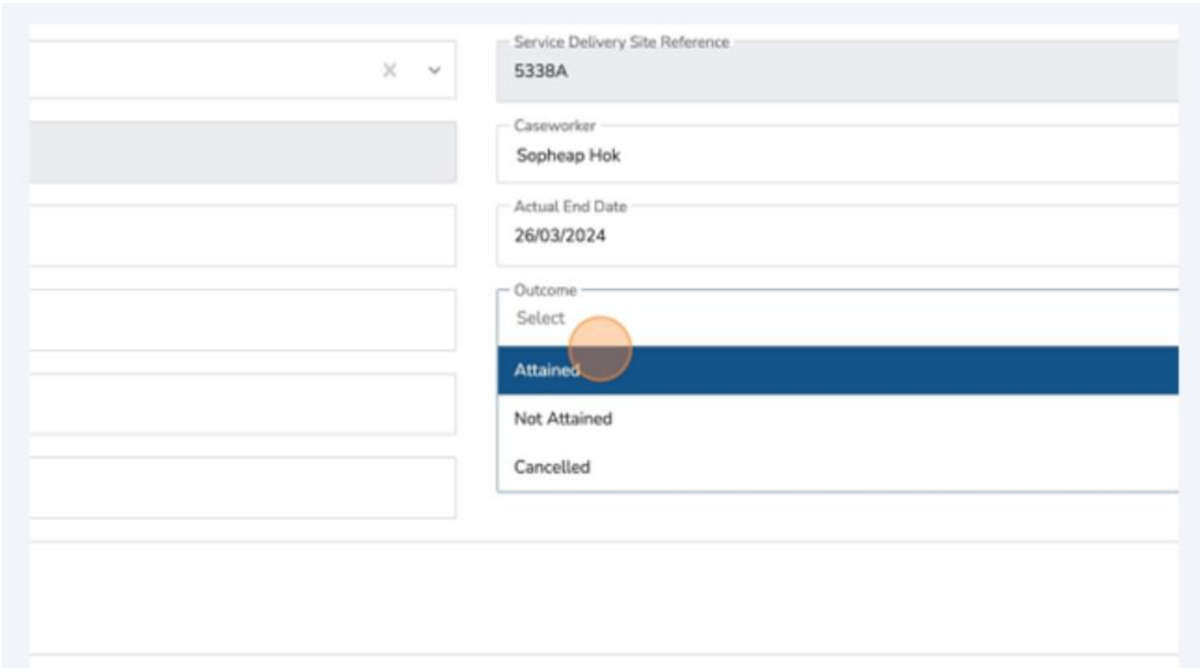
15. Insert the appropriate “Rationale.”

✓ Note: Rationale should be detailed and explain why it removes a temporary barrier for the client. Please include enough information for the approver to determine why the item is required. The Rationale has a maximum of 500 characters that can be supplied.

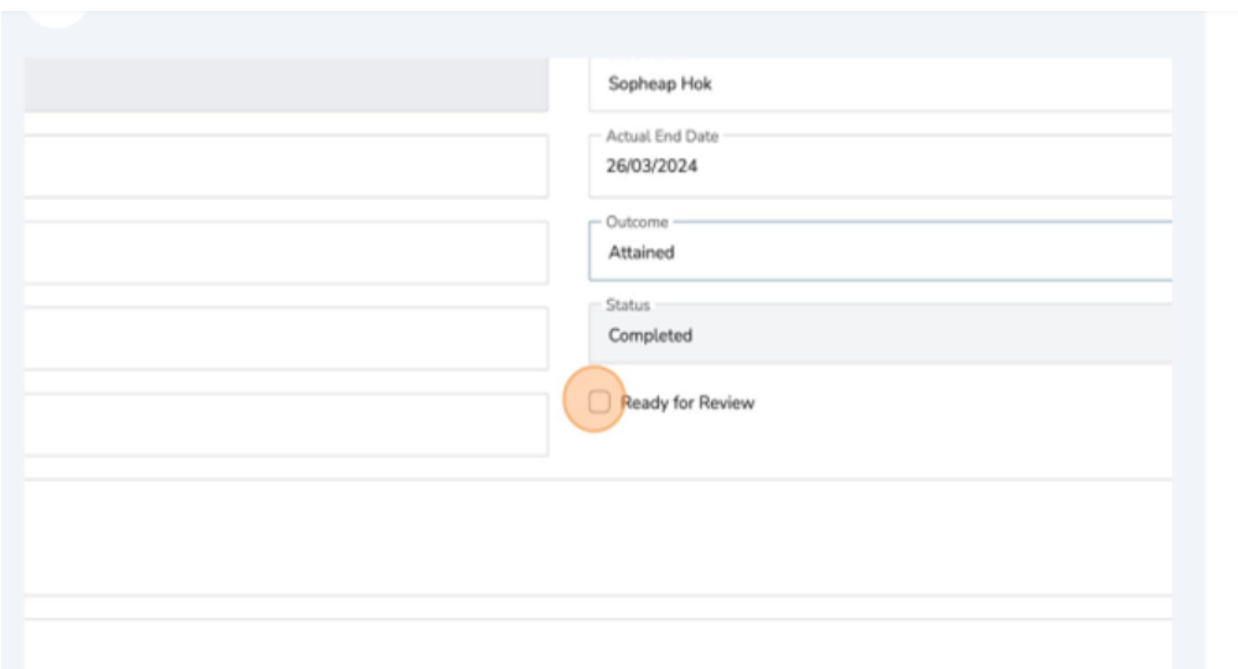
16. Click the “Outcome” field.



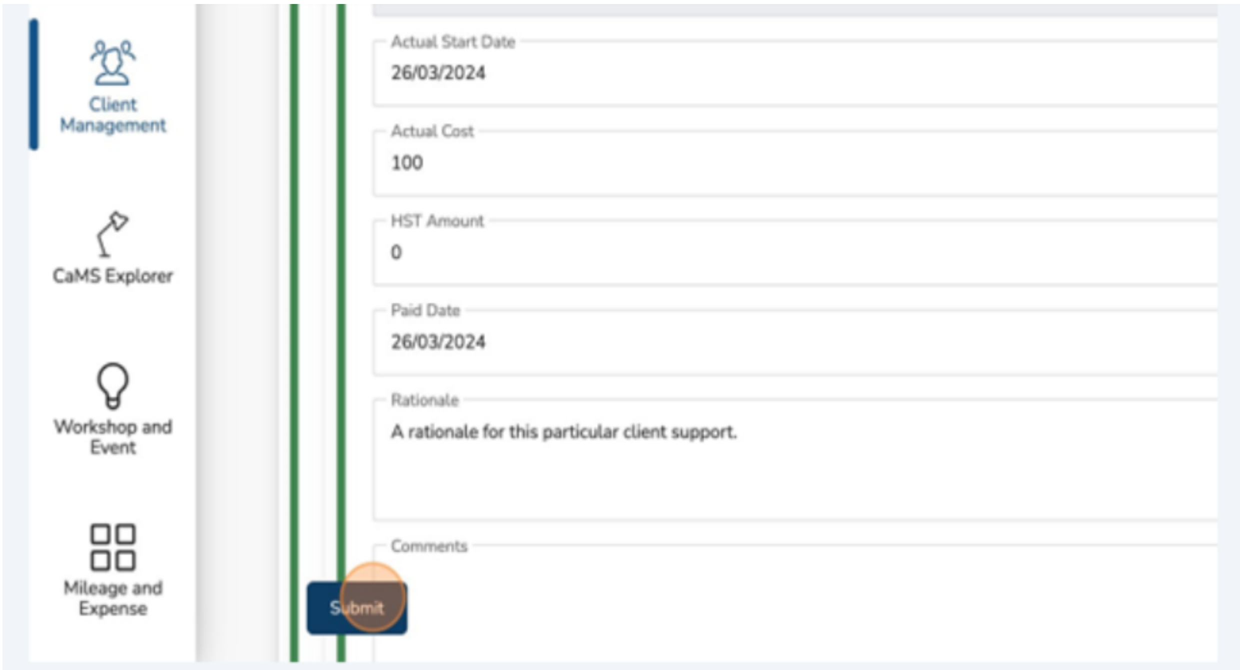
17. Select the appropriate “Outcome.”



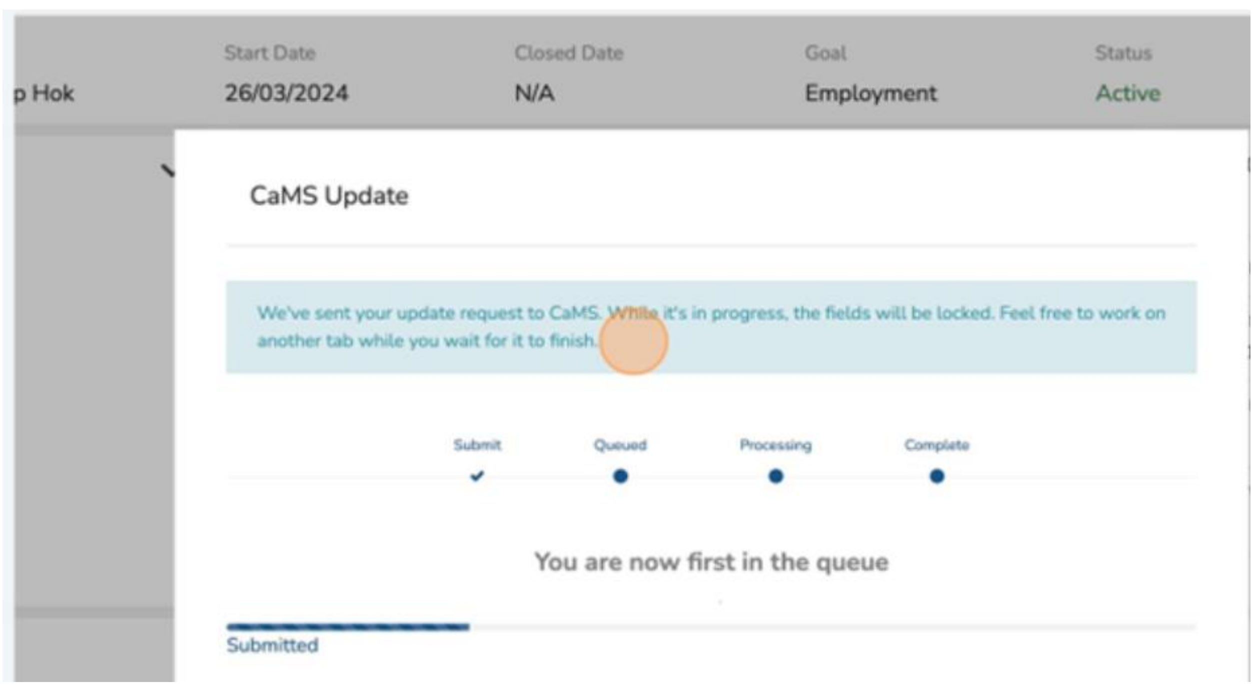
18. Click the “Ready for Review” checkbox.



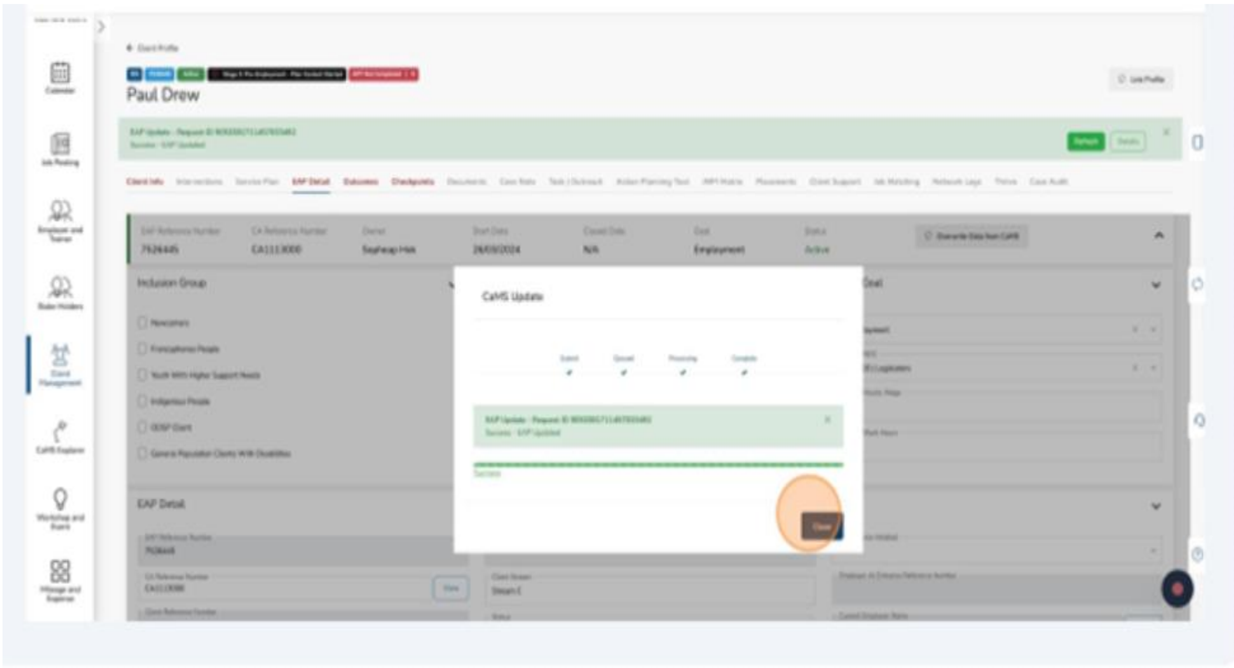
19. Click “Submit.”



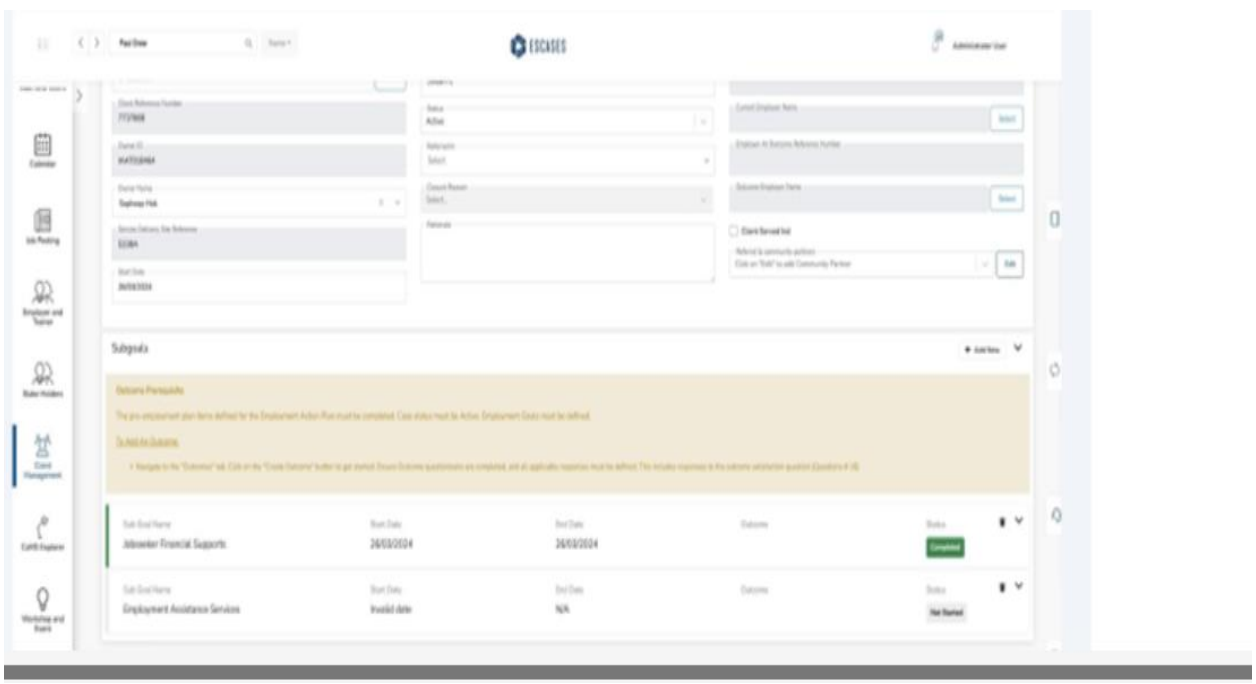
The planned item will be uploaded in CaMS. You will be placed in queue while the upload takes place.



20. When the submission is completed, click "Close."

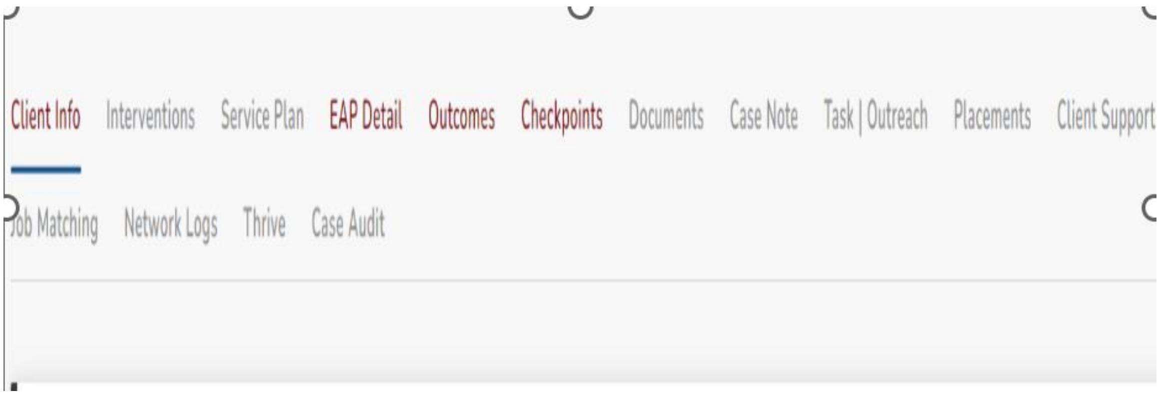


The page will refresh with your submission processed by CaMS.

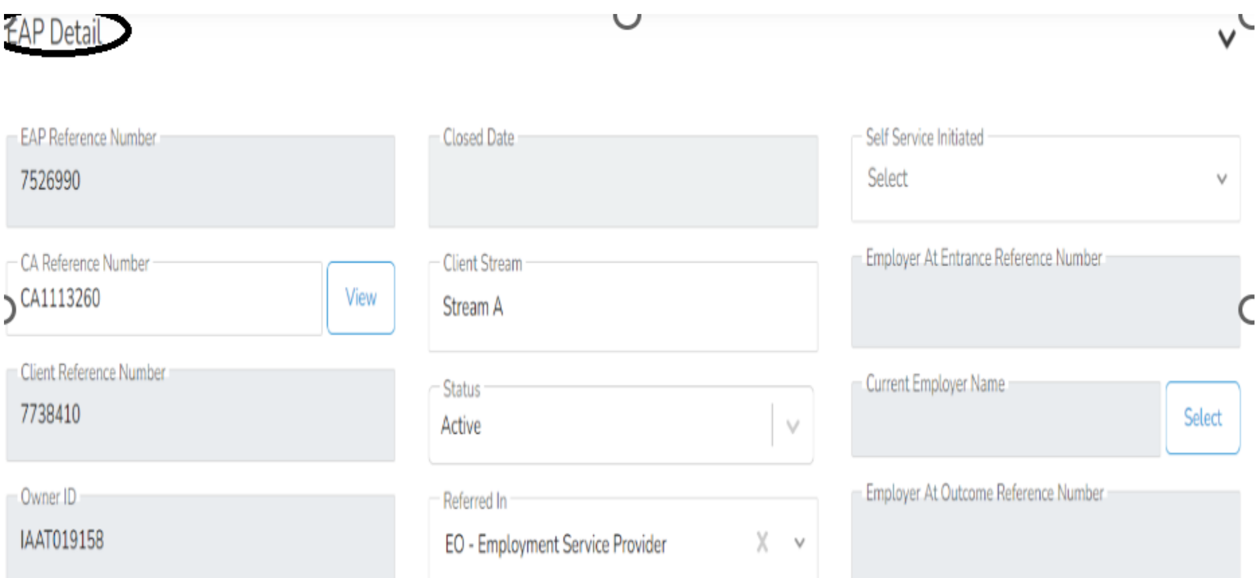


(14) Early Exits

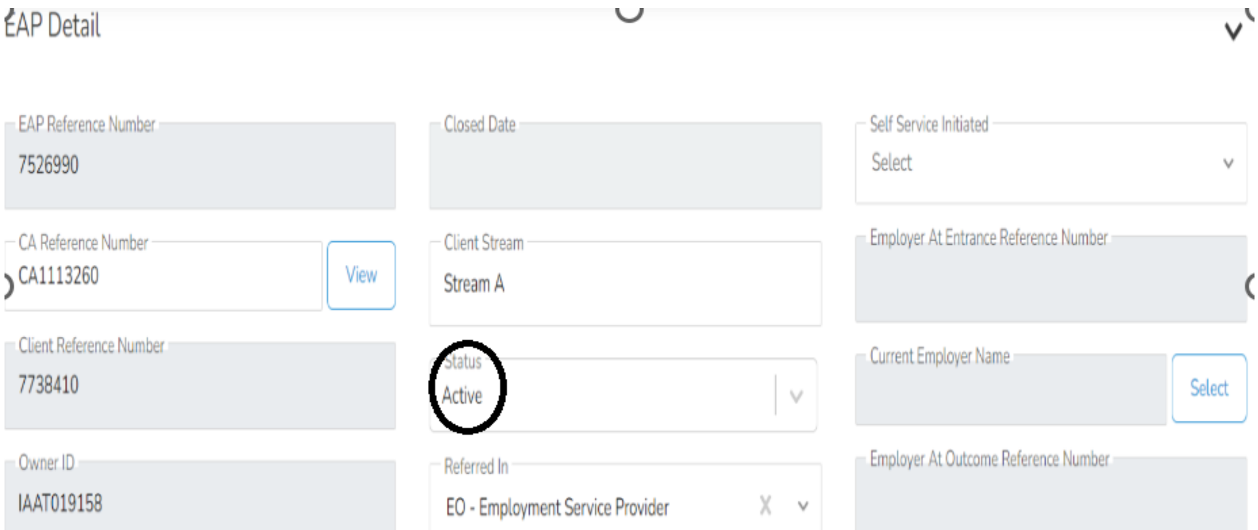
1. On the client page, click “EAP details.”



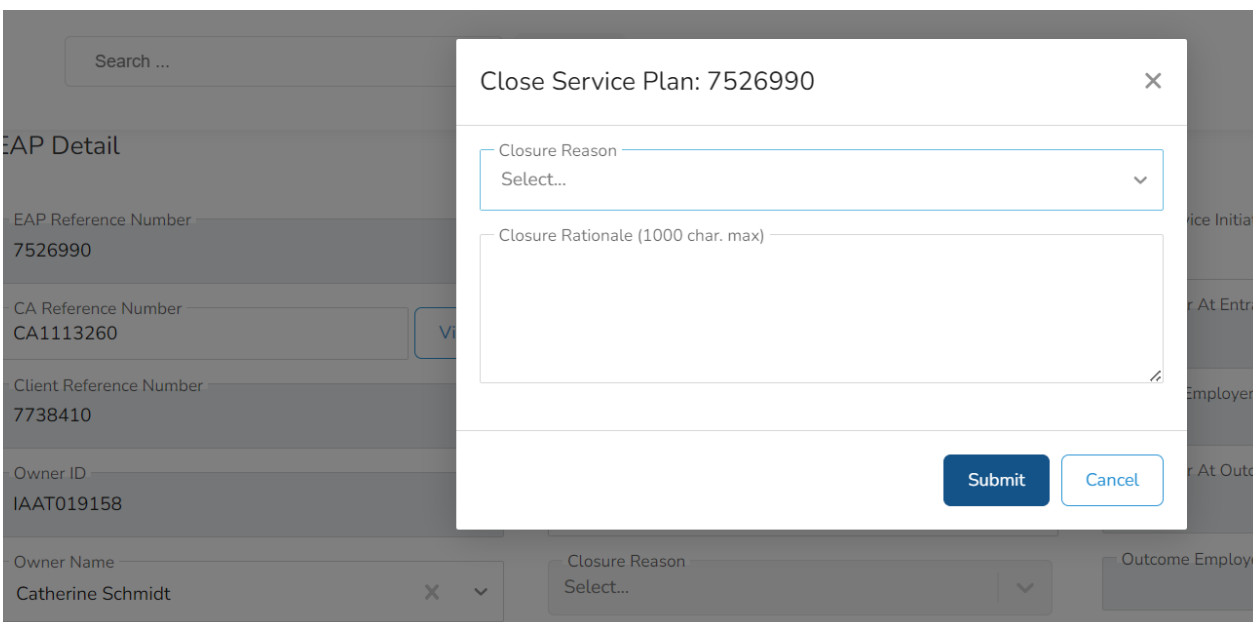
2. Scroll down to “EAP Details.”



3. Click “Status.”



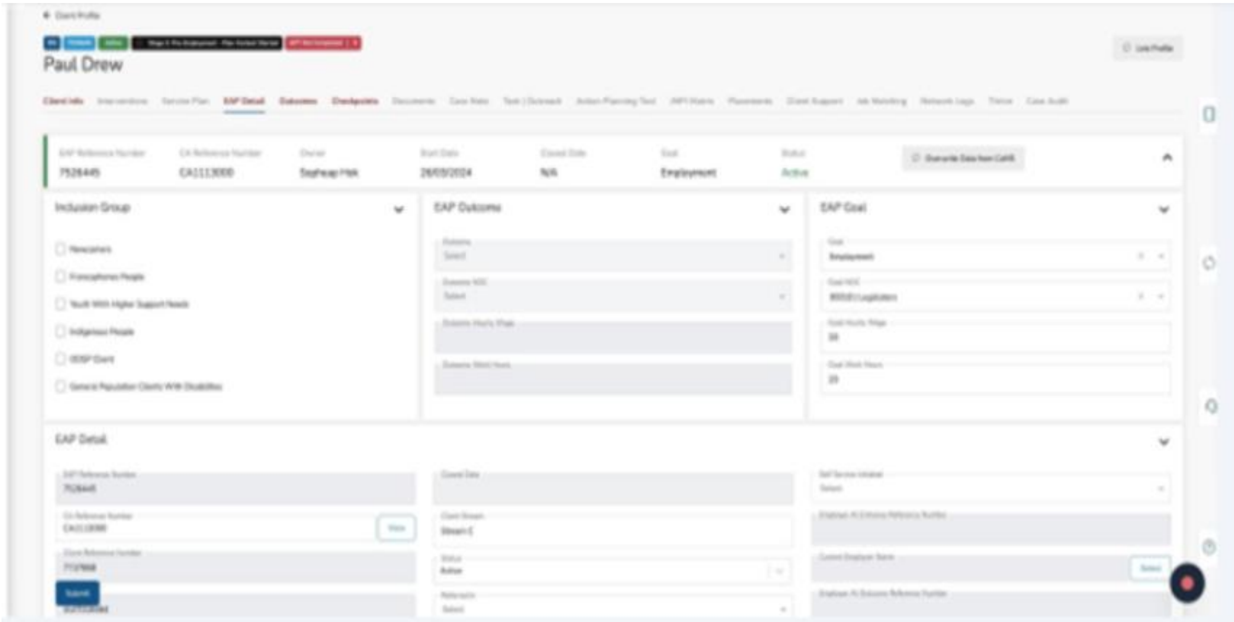
4. Change Status to “Closed” or “Active - On Hold.” Close Service Plan screen displays.



5. Select a “Closure Reason.”

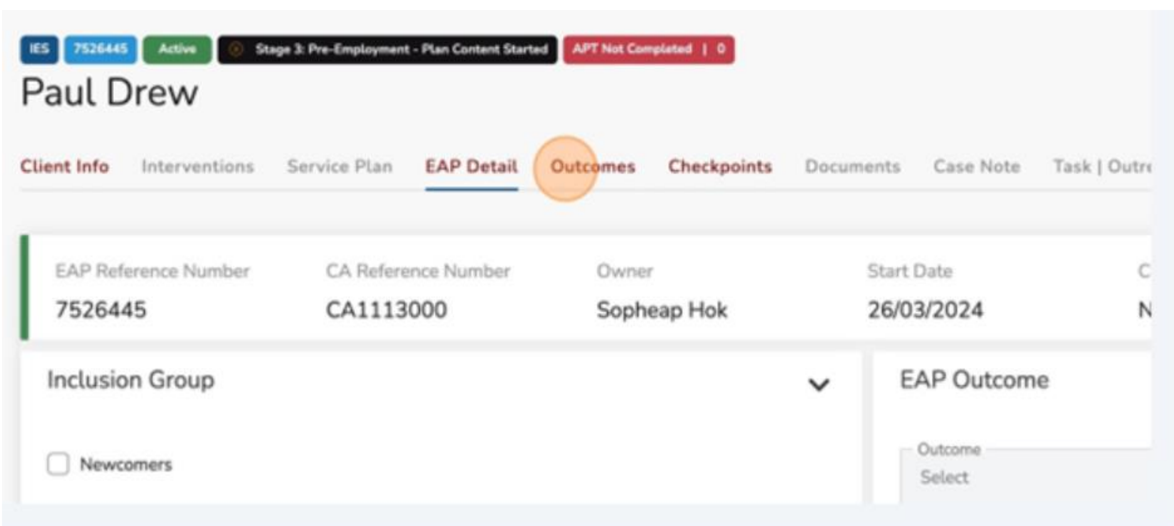
(15) Create an Outcome for a Client

1. Navigate to the client profile.

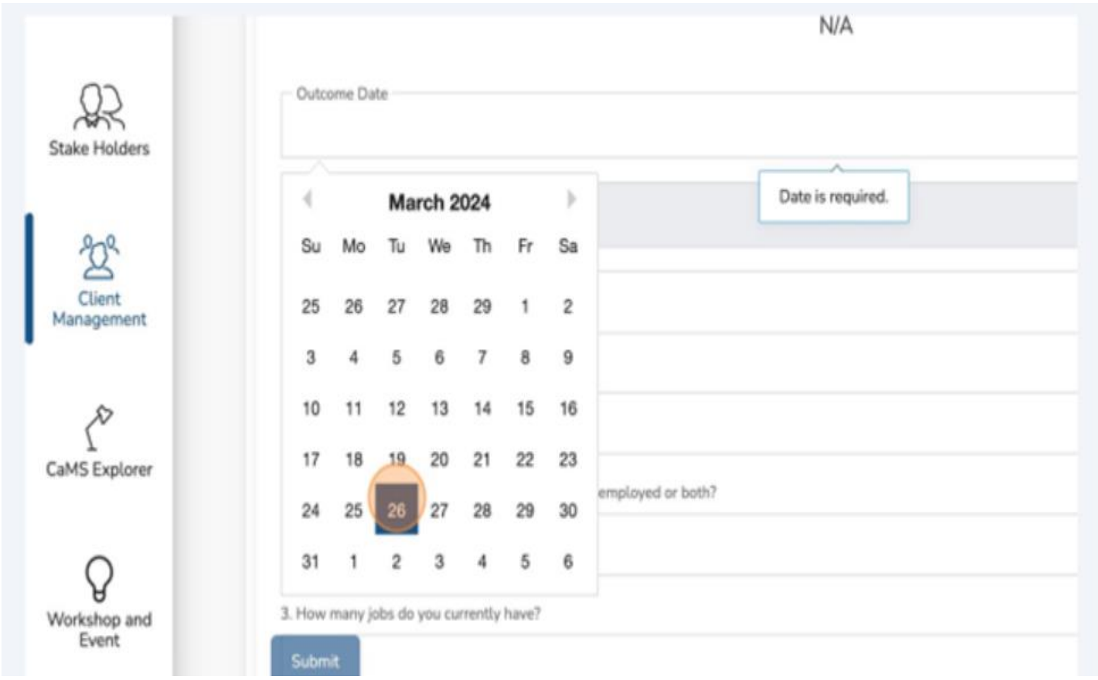


➢ Alert! There are several conditions to be completed prior to completing an Outcomes such as ensuring all Subgoals and Planned Items have a "Completed" status as well as having all four of the EAP Goals from the CA fulfilled (Goal NOC, Goal Hourly Wage, Goal Work Hours, Goal Employment).

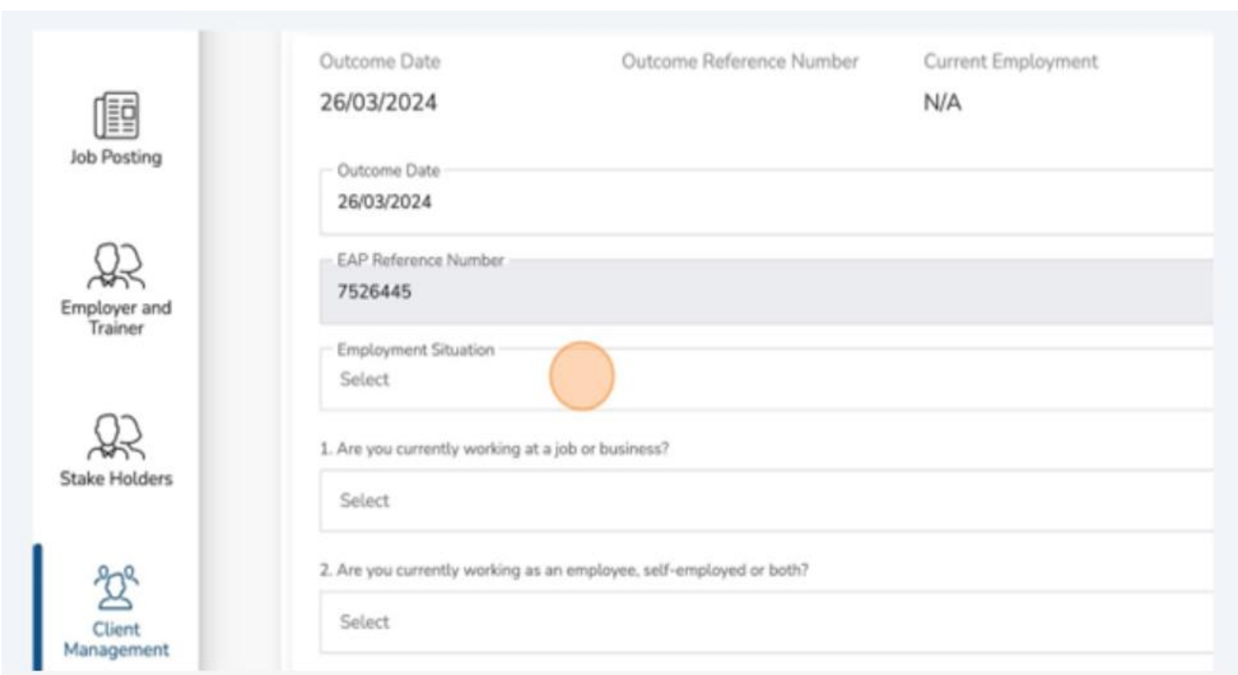
1. Click “Outcomes.”



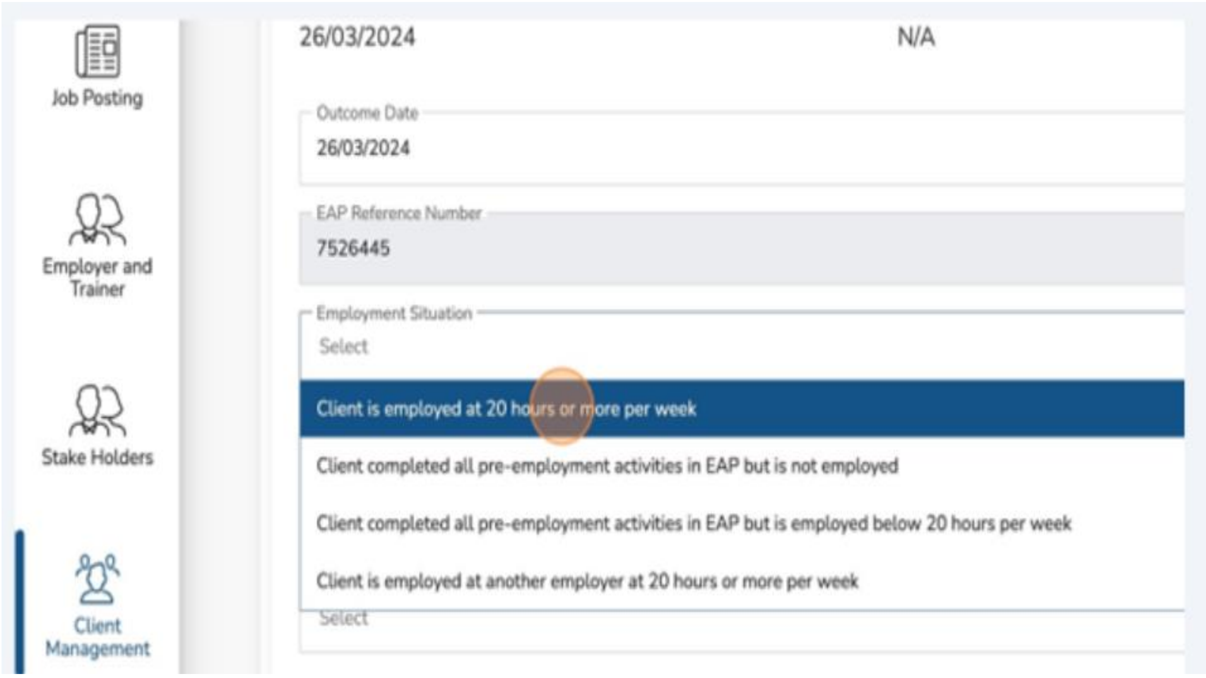
2. Select the appropriate “Outcome Date.”



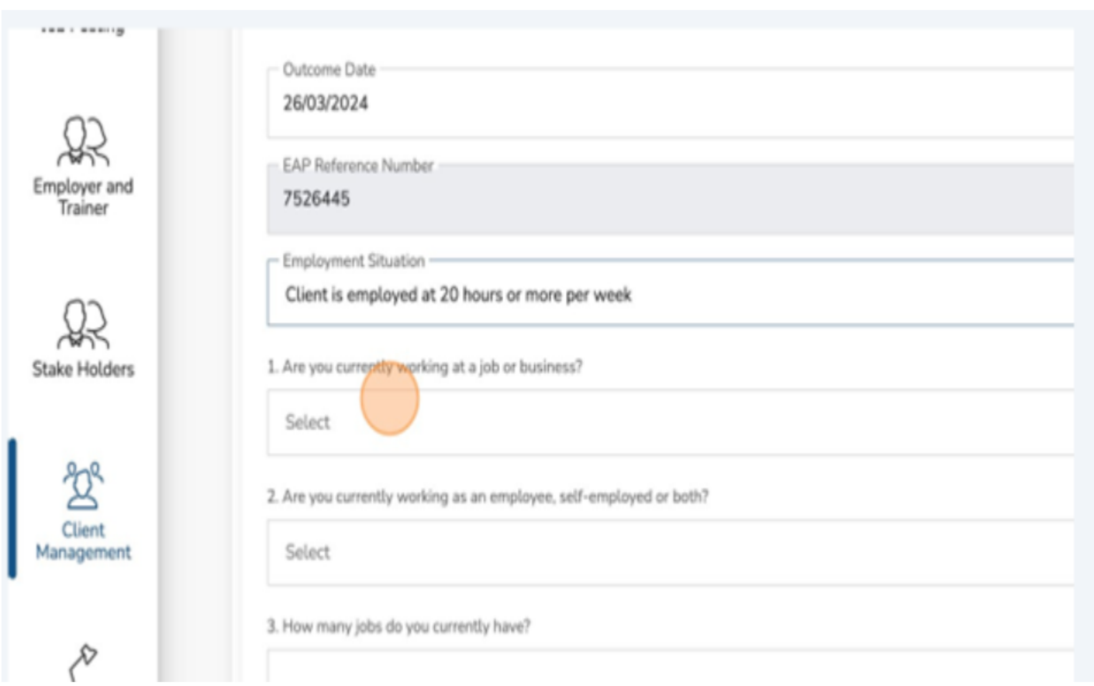
3. Click the “Employment Situation” field.



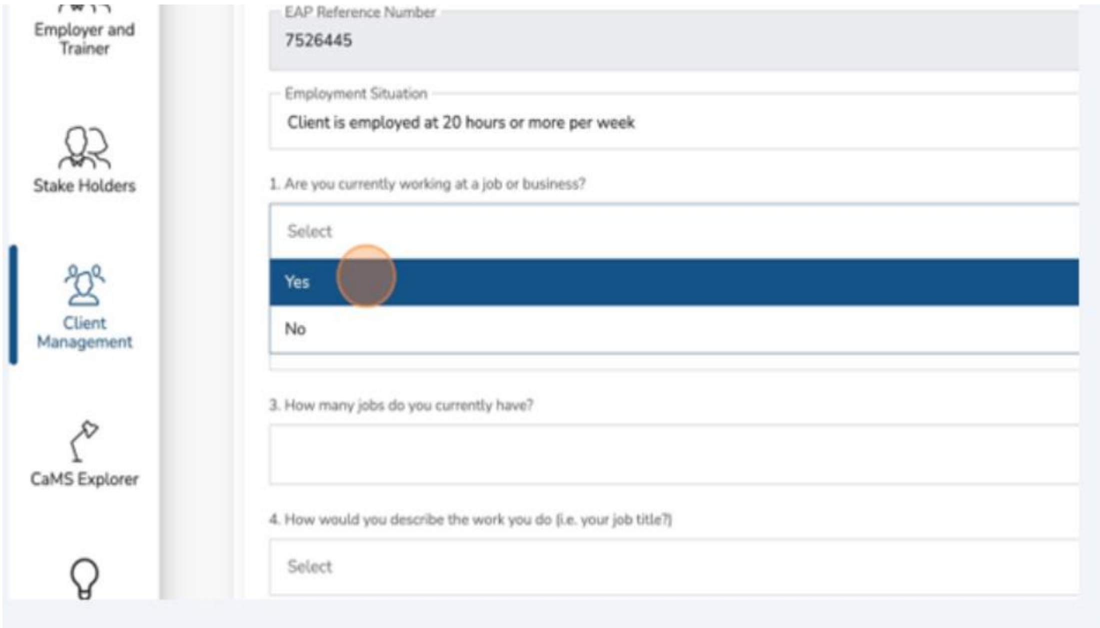
4. Select the appropriate “Employment Situation.”



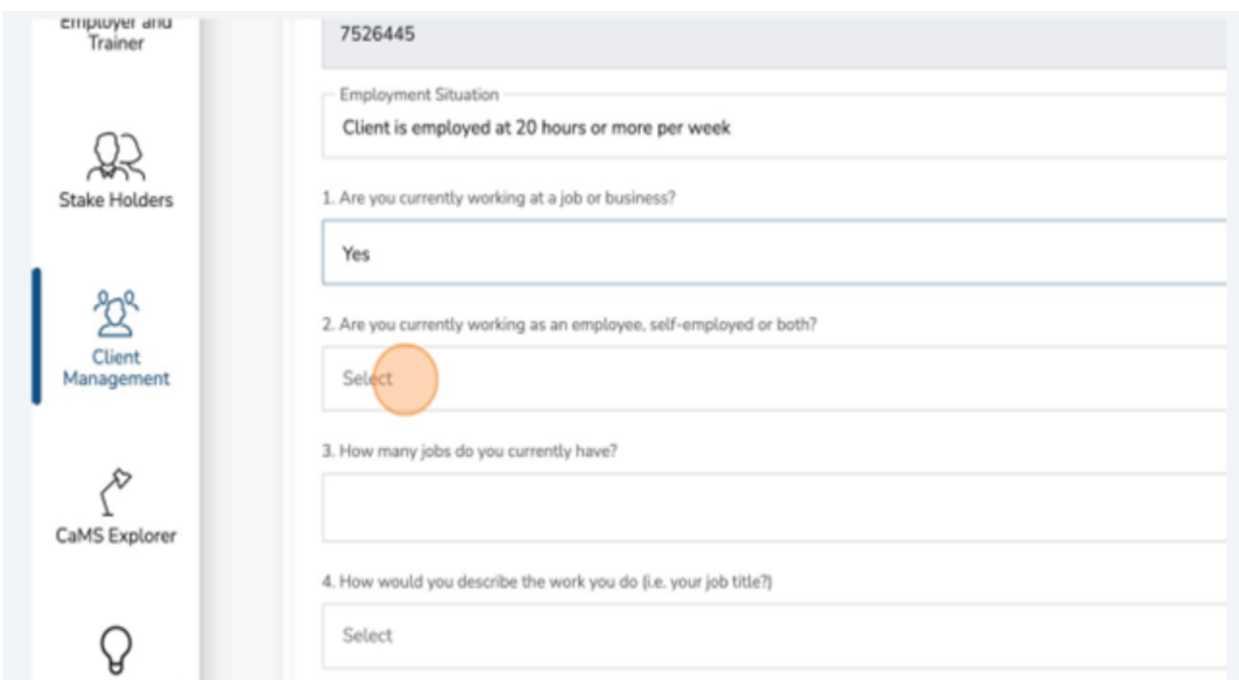
5. Click the “Are you currently working at a job or business?” field.



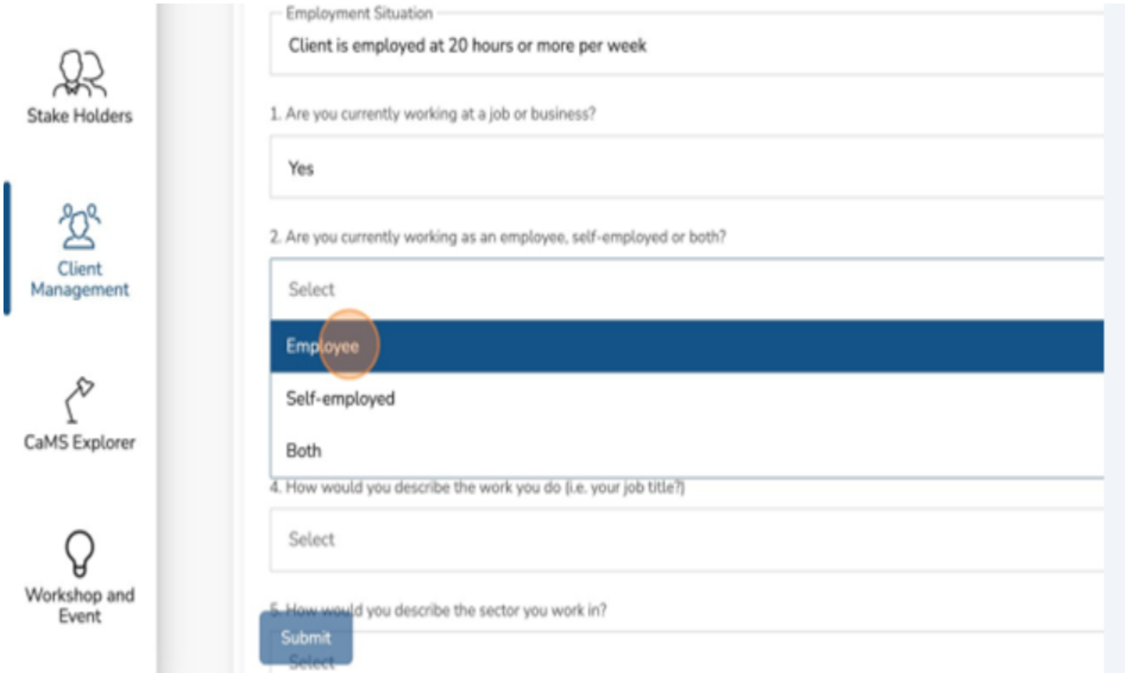
6. Select the appropriate answer.



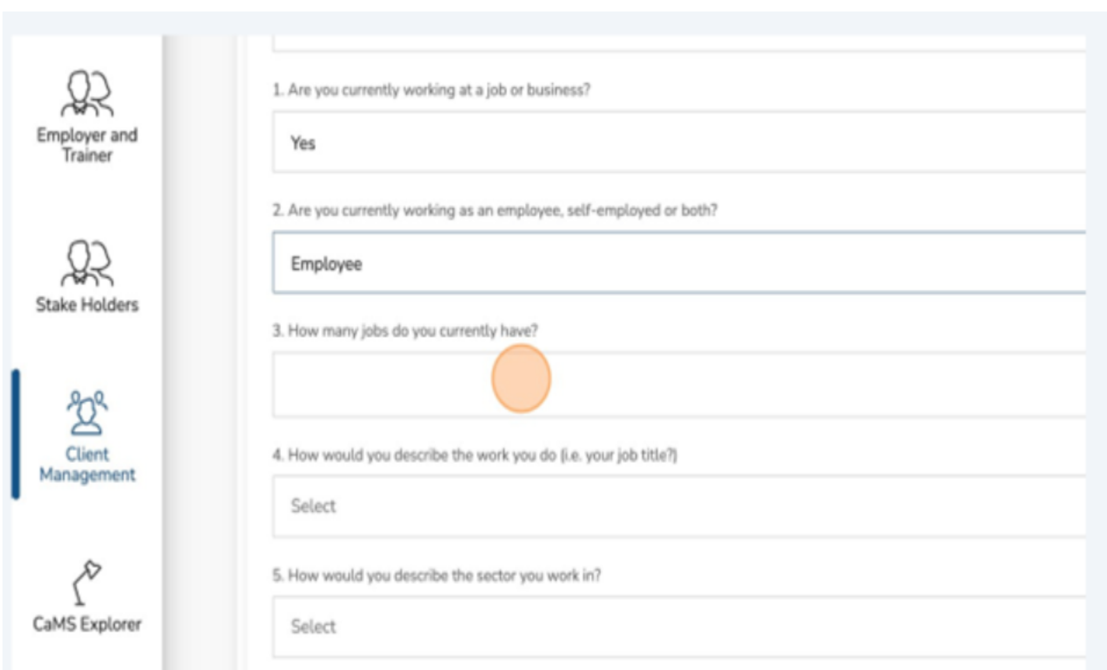
7. Click the "Are you currently working as an employee, self-employed or both?" field.



8. Select the appropriate answer.

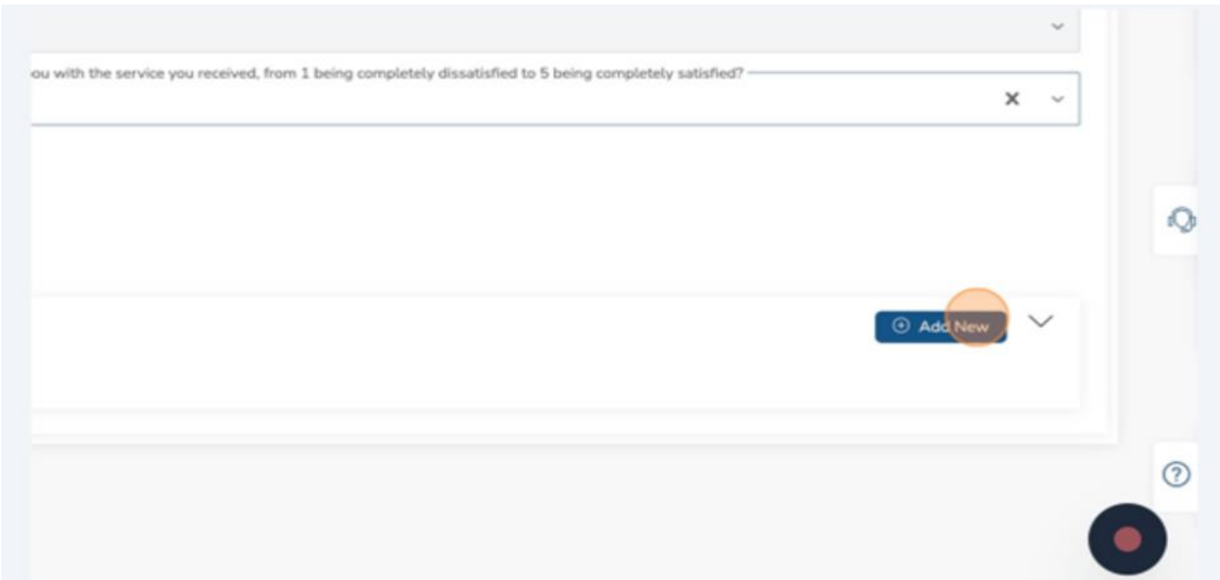


9. Click the “How many jobs do you currently have?” field.

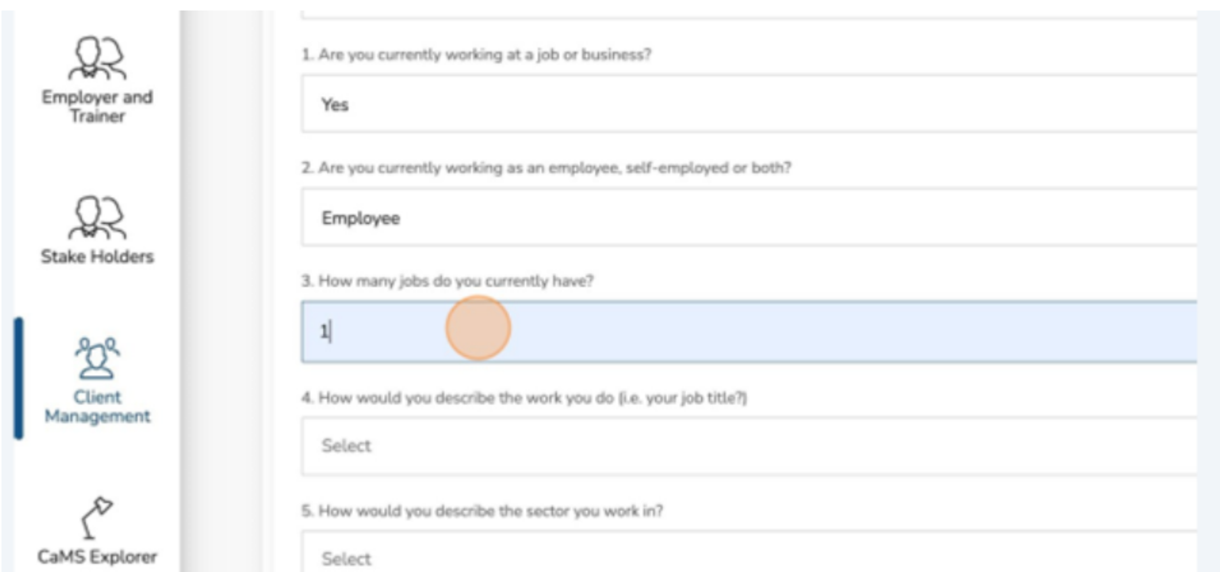


✓ Note: Should your response to Question 3 (How many jobs do you currently have?) be one or more, it is mandatory to fill out the Outcomes Jobs section of the questionnaire for each job held. Please complete additional Outcomes Jobs questionnaire for every job you report.

10. Click "Add New."

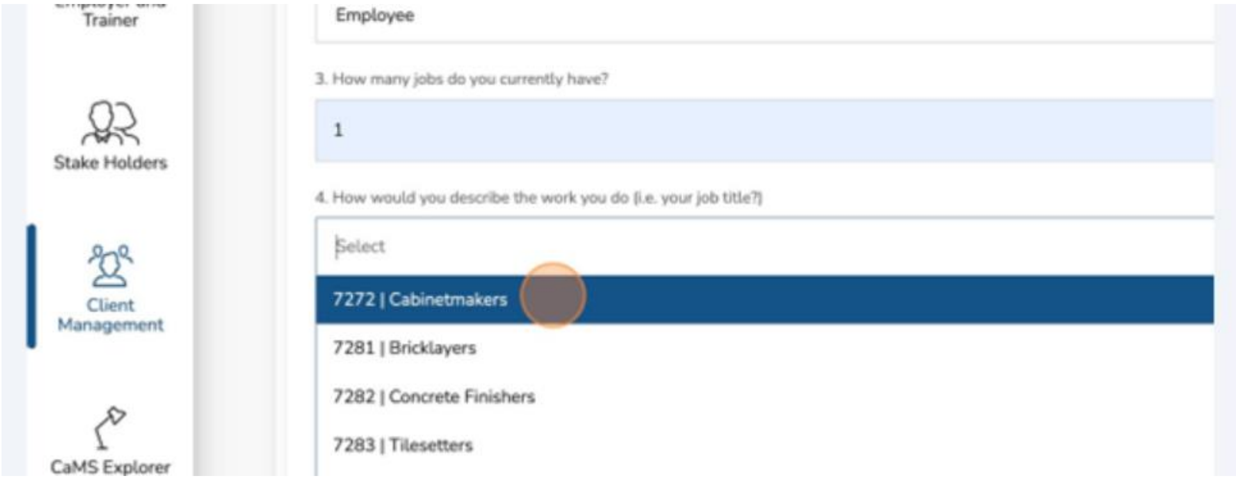


11. Input the appropriate number.

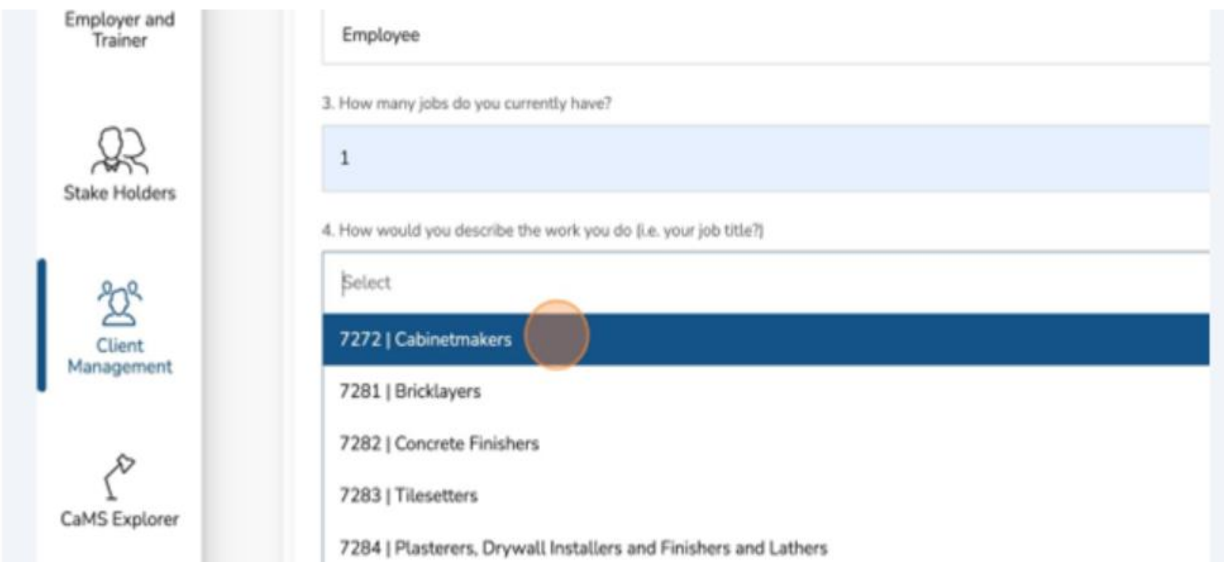


✓ Should your response to Question 3 (How many jobs do you currently have?) be one or more, it's mandatory to fill out the Outcomes Jobs section of the questionnaire for each job held. Please complete an additional Outcomes Jobs questionnaire for every job you report.

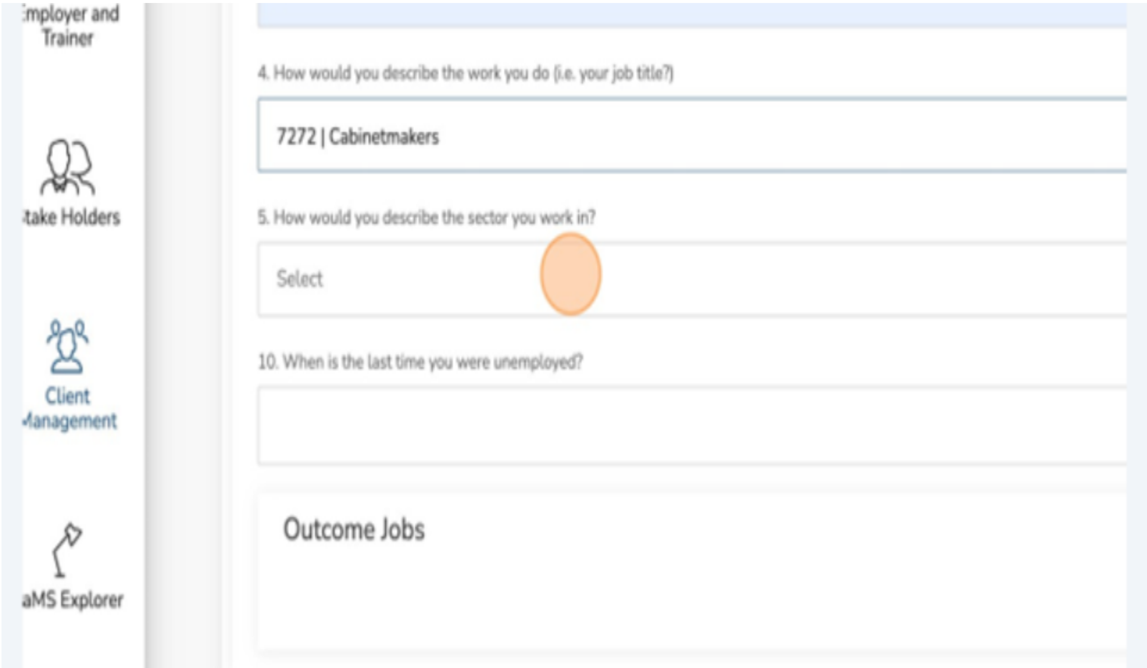
12. Click “How would you describe the work you do (i.e. your job title?).”



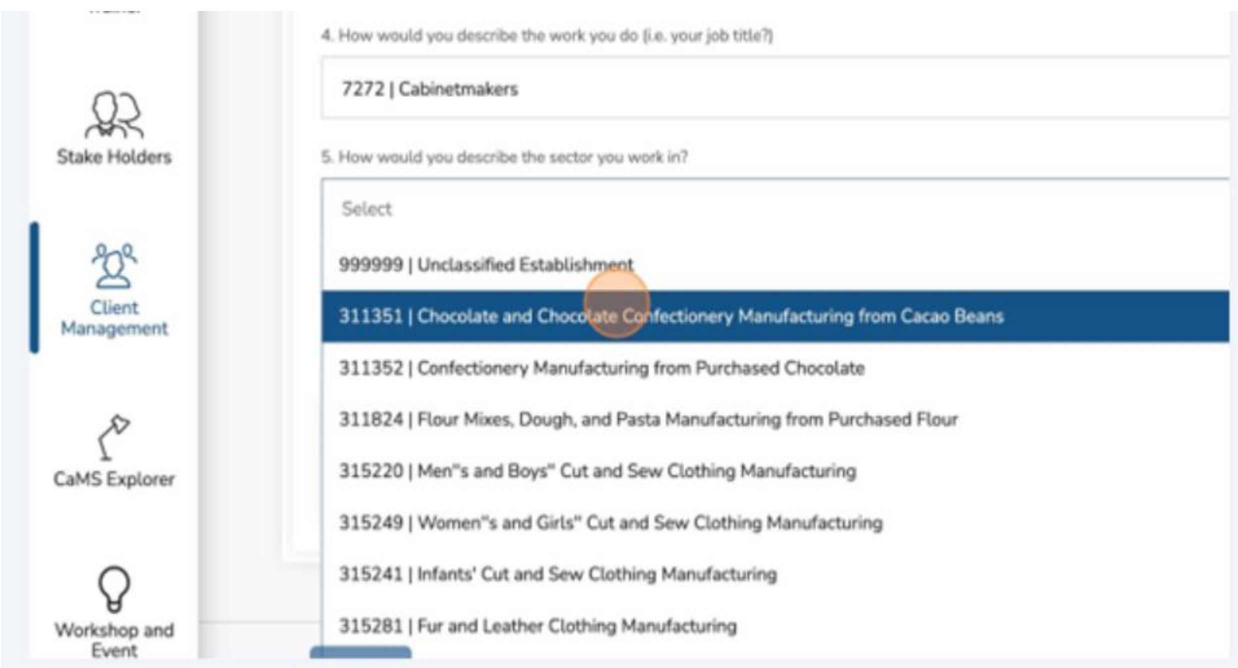
13. Select the appropriate “NOC.”



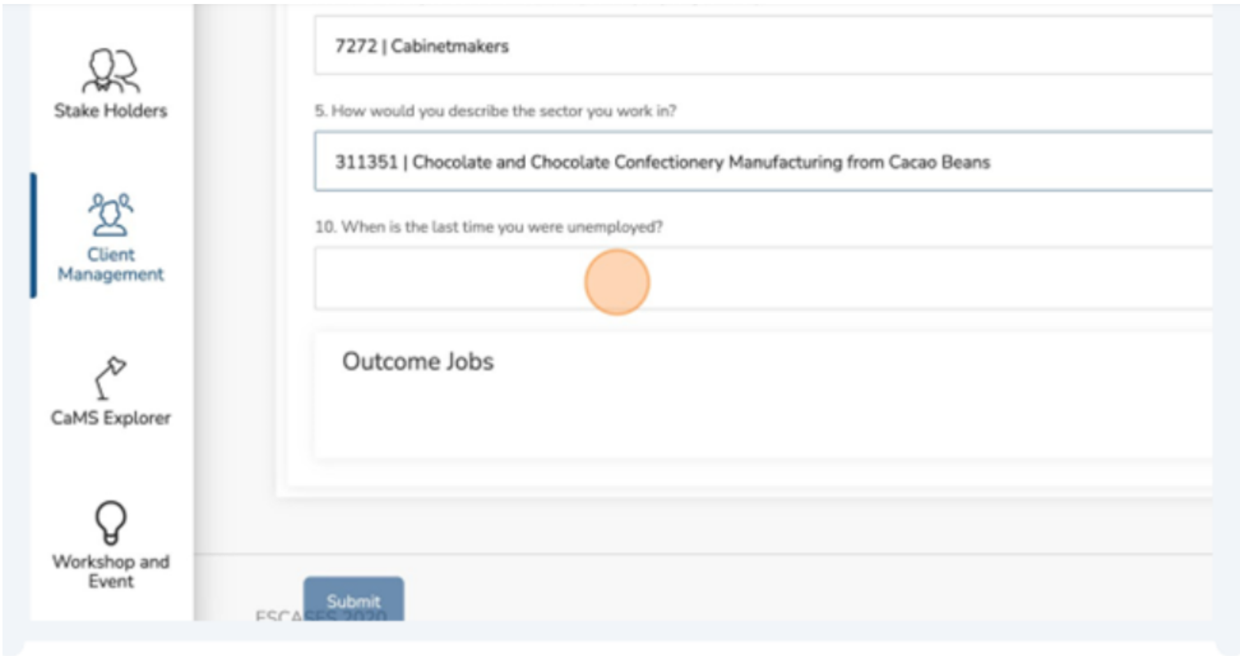
14. Click the “How would you describe the sector you work in?” field.



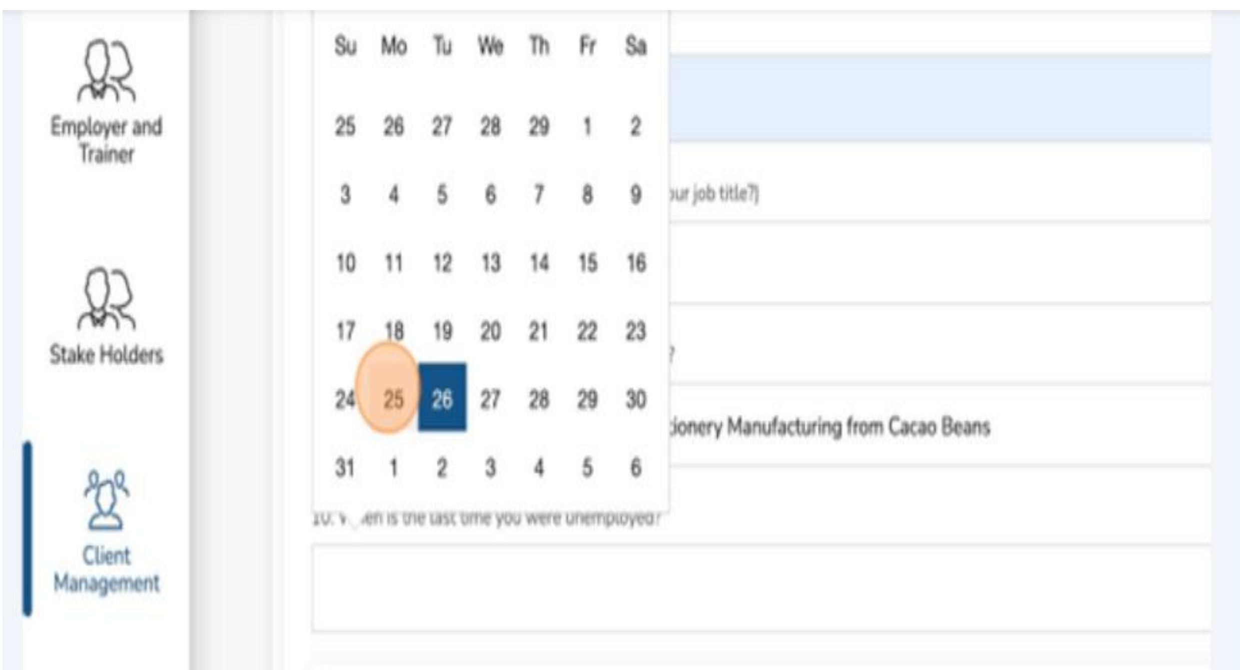
15. Select the appropriate sector.



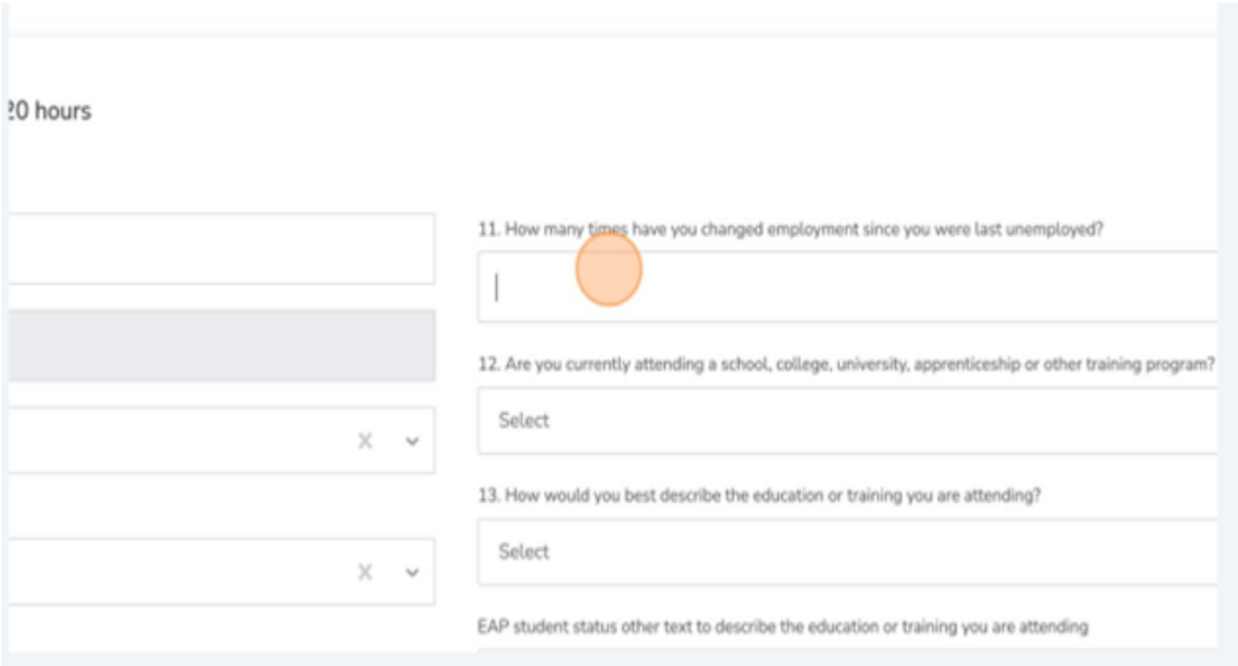
16. Click the “When is the last time you were unemployed” field.



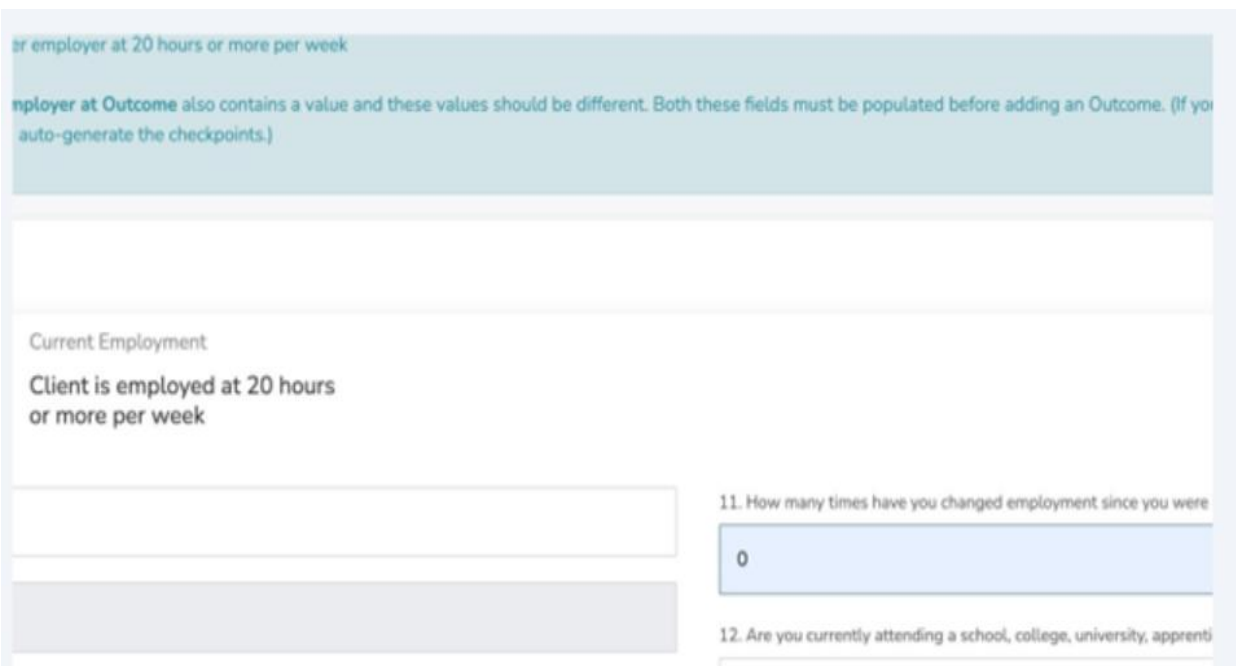
17. Select the appropriate date.



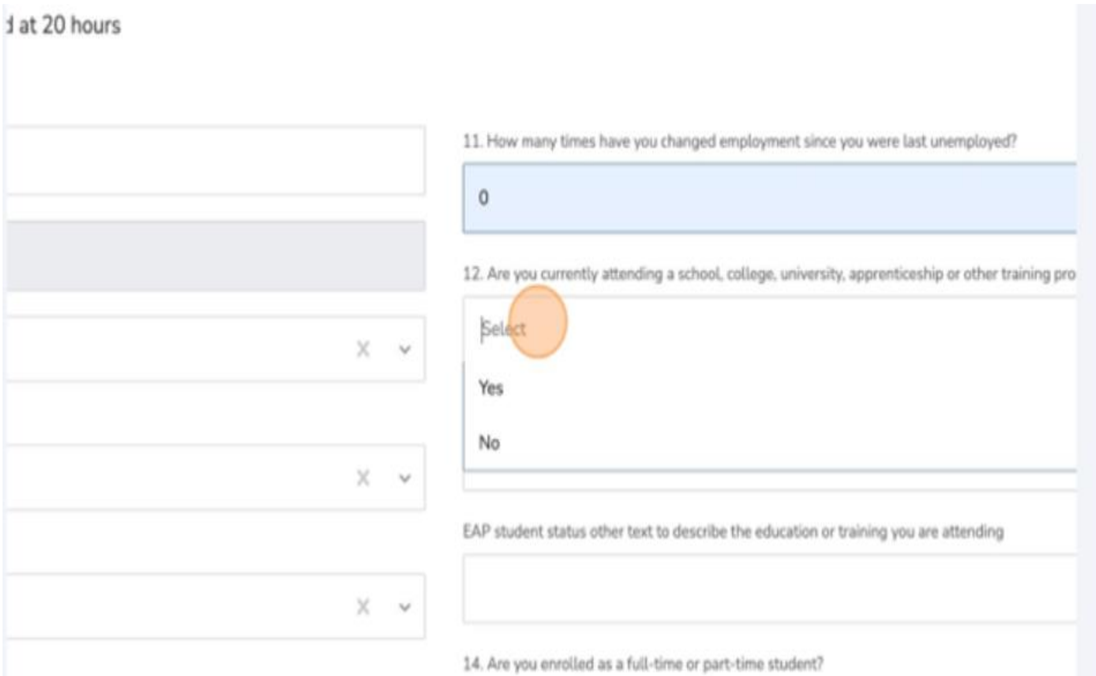
18. Click the “How many times have you changed employment since you were last unemployed” field.



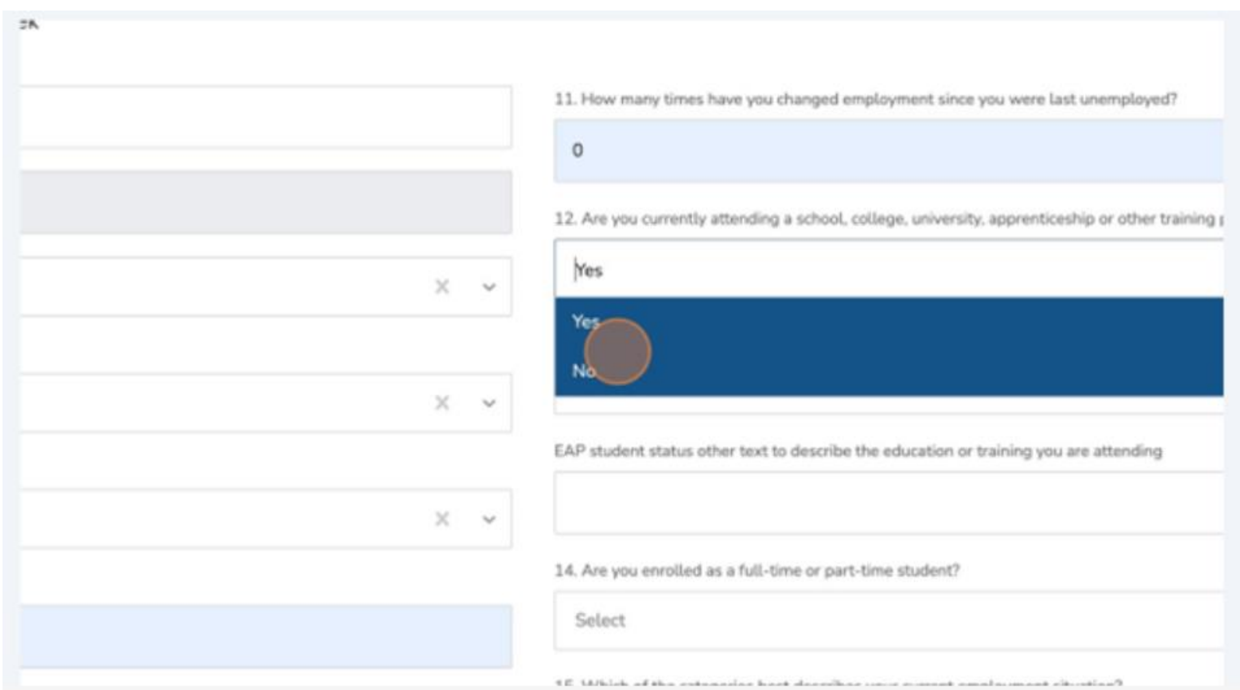
19. Insert the appropriate number.



20. Click the “Are you currently attending a school, college, university, apprenticeship, or other training program” field.

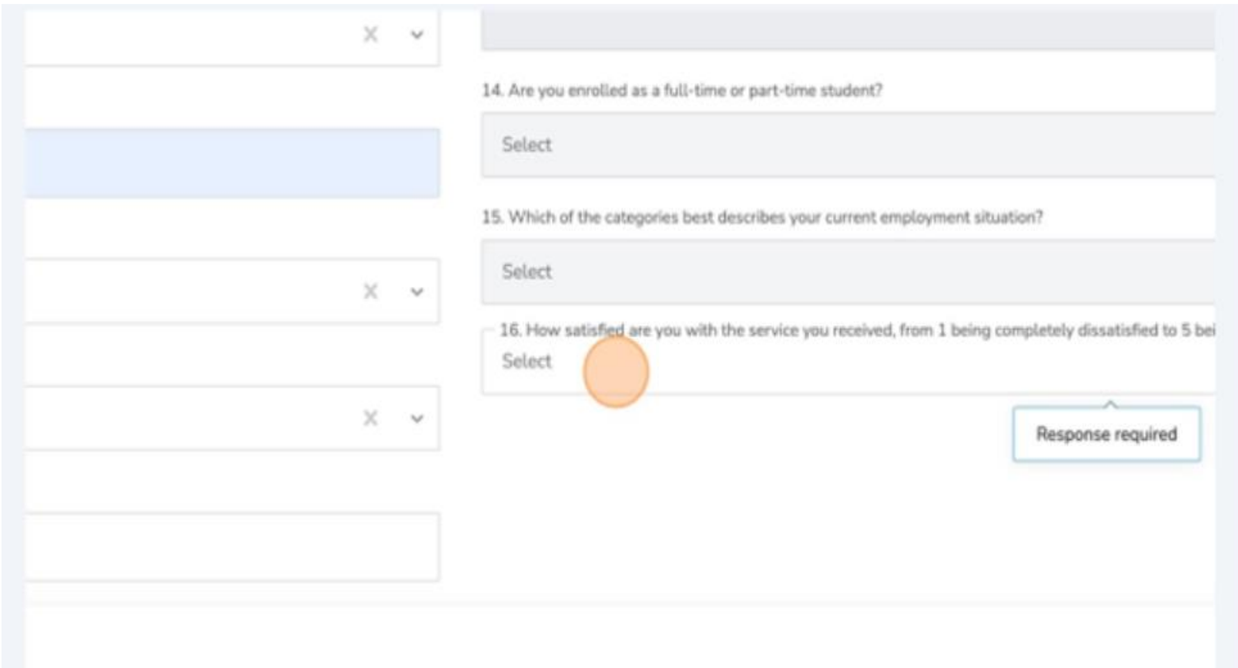


21. Select the appropriate answer.

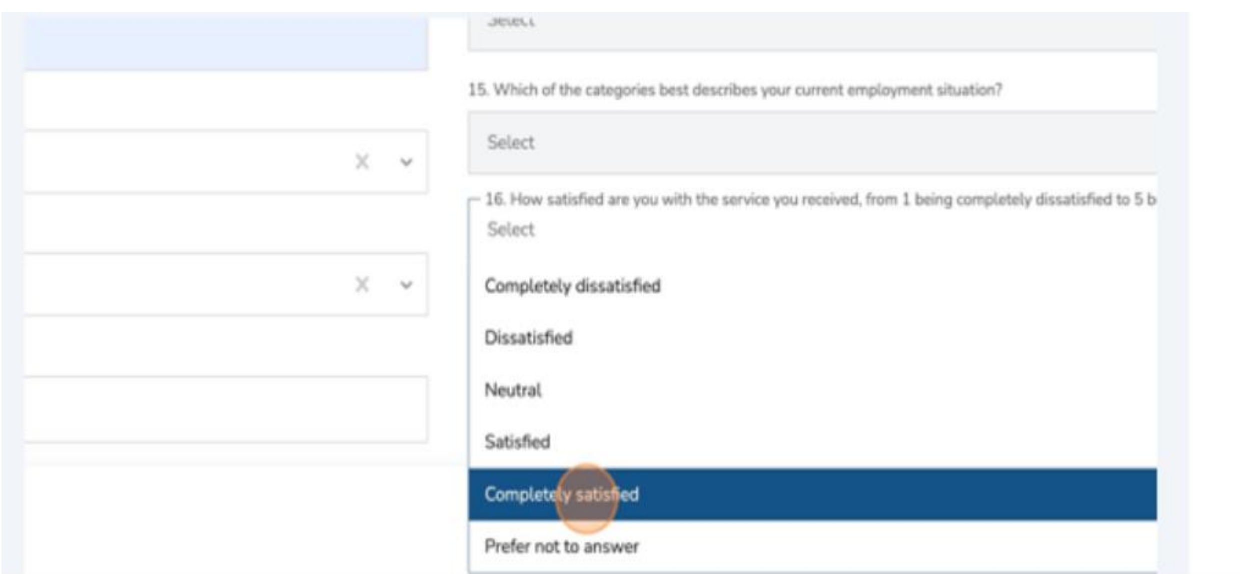


❖ Tip: The questionnaire in Outcomes vary as they are guided by conditional logic. This means certain questions will only appear based on specific answers being supplied. If yes is selected to this question, answer the additional questions required.

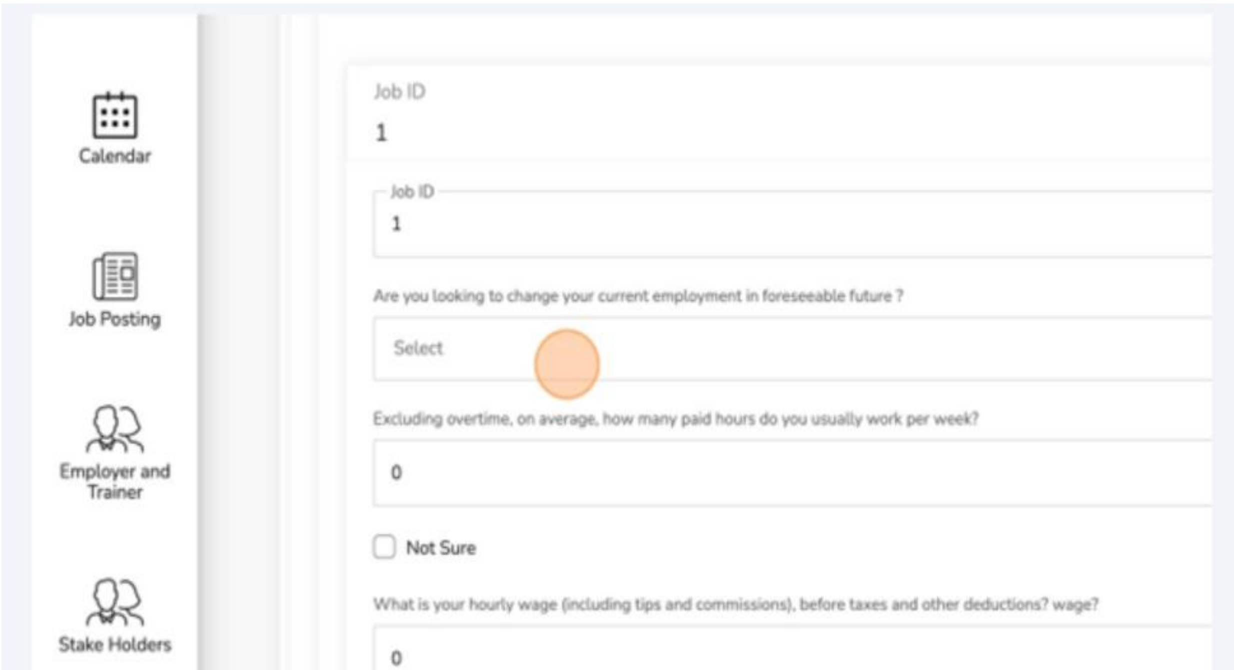
22. Click "How satisfied are you with the service you received" field.



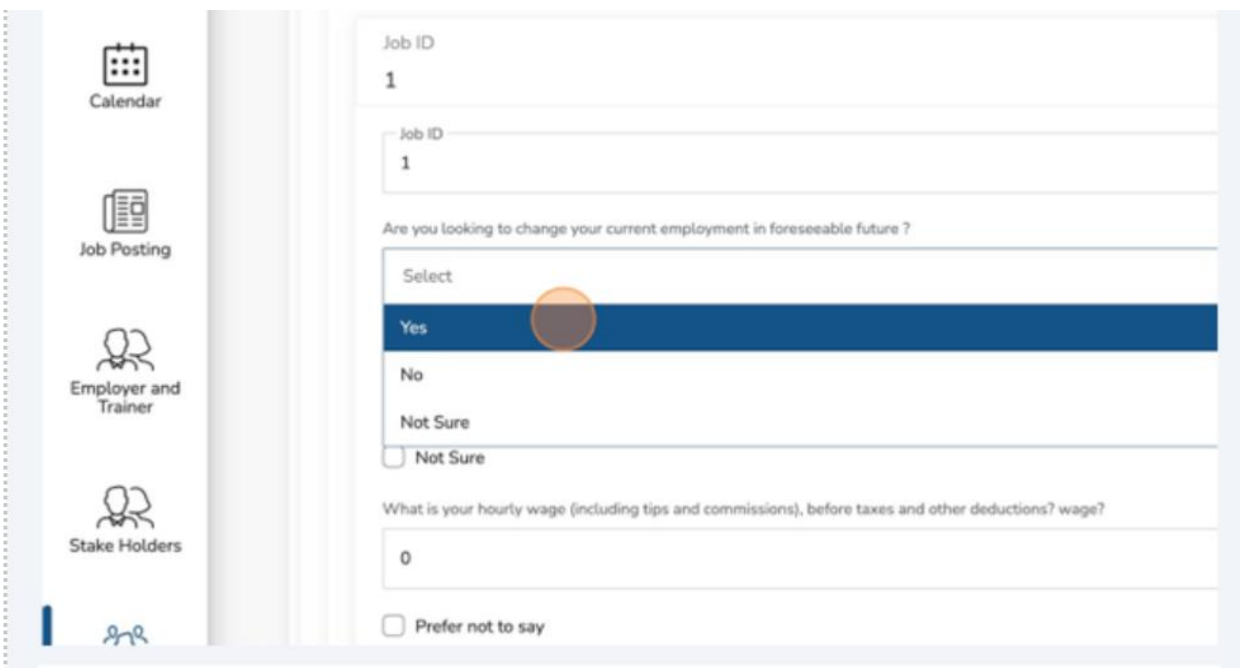
23. Select the appropriate answer.



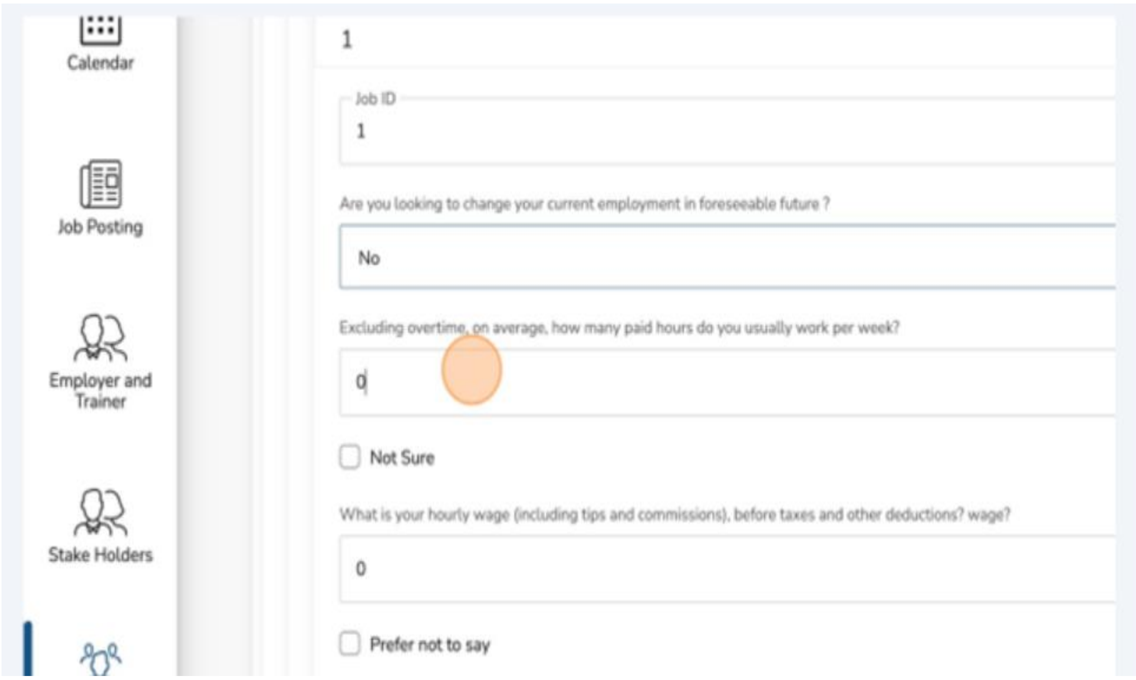
24. Click the “Are you looking to change your current employment in foreseeable future?” field.



25. Select the appropriate answer.

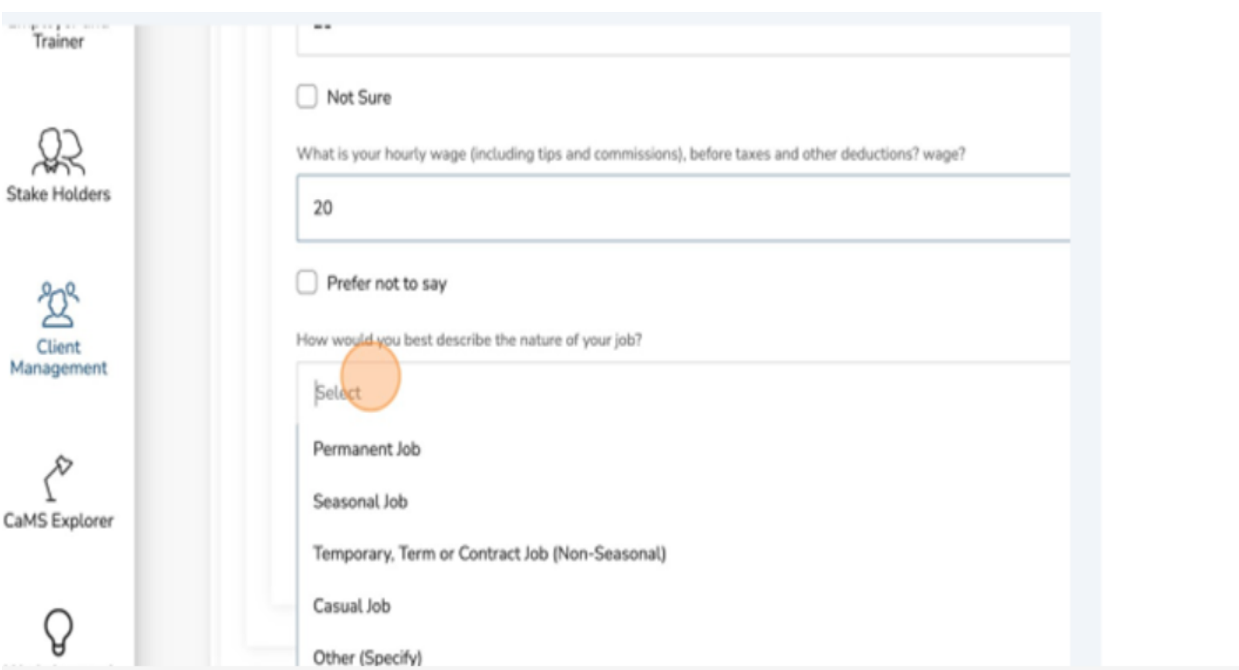


25.Click the “Excluding overtime, on average, how many paid hours do you usually work per week?” field.

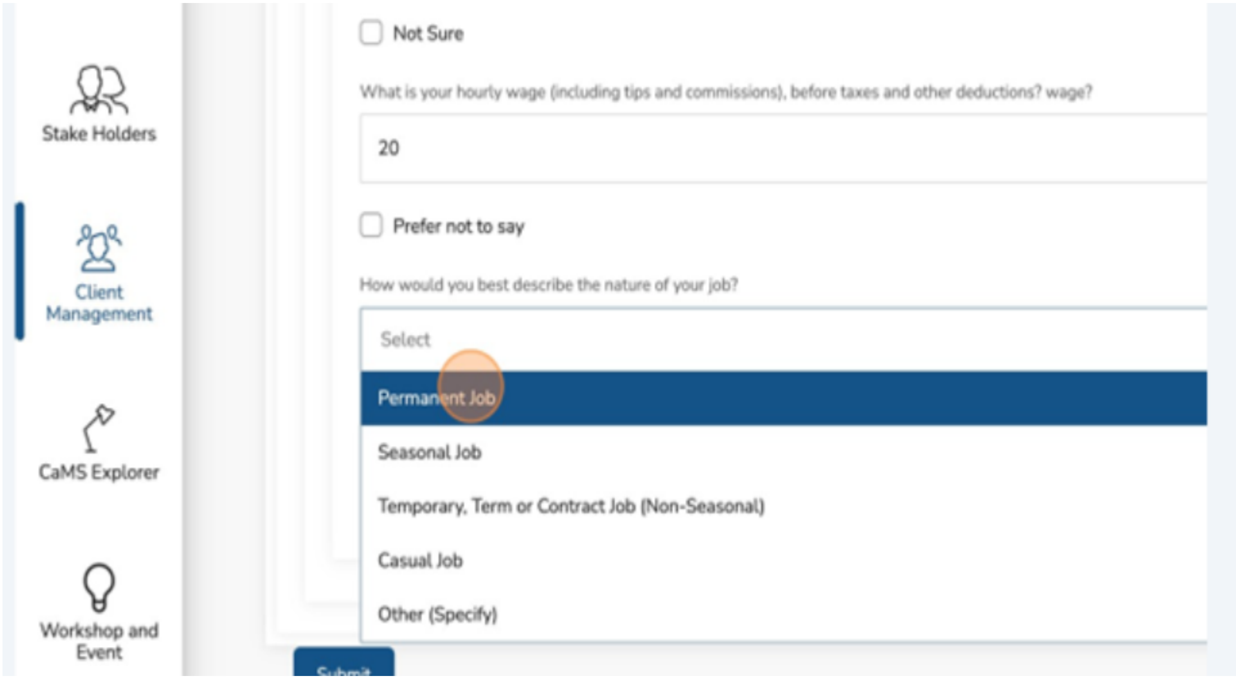


26. Input the appropriate answer.

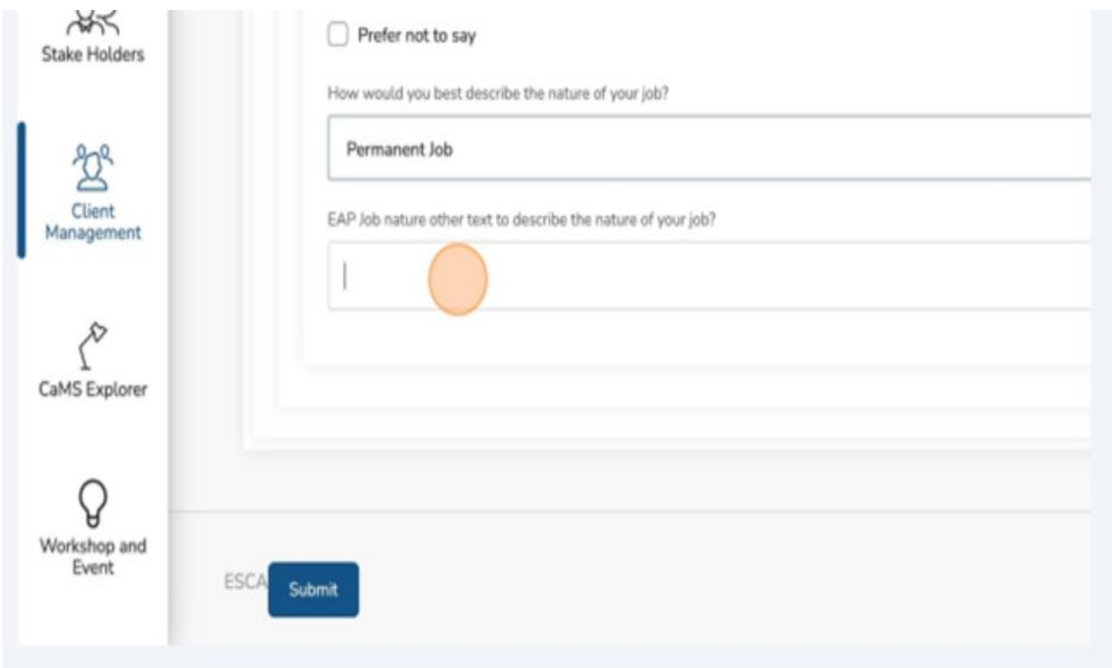
27. Click “How would you best describe the nature of your job?” field.



28. Select the appropriate answer.

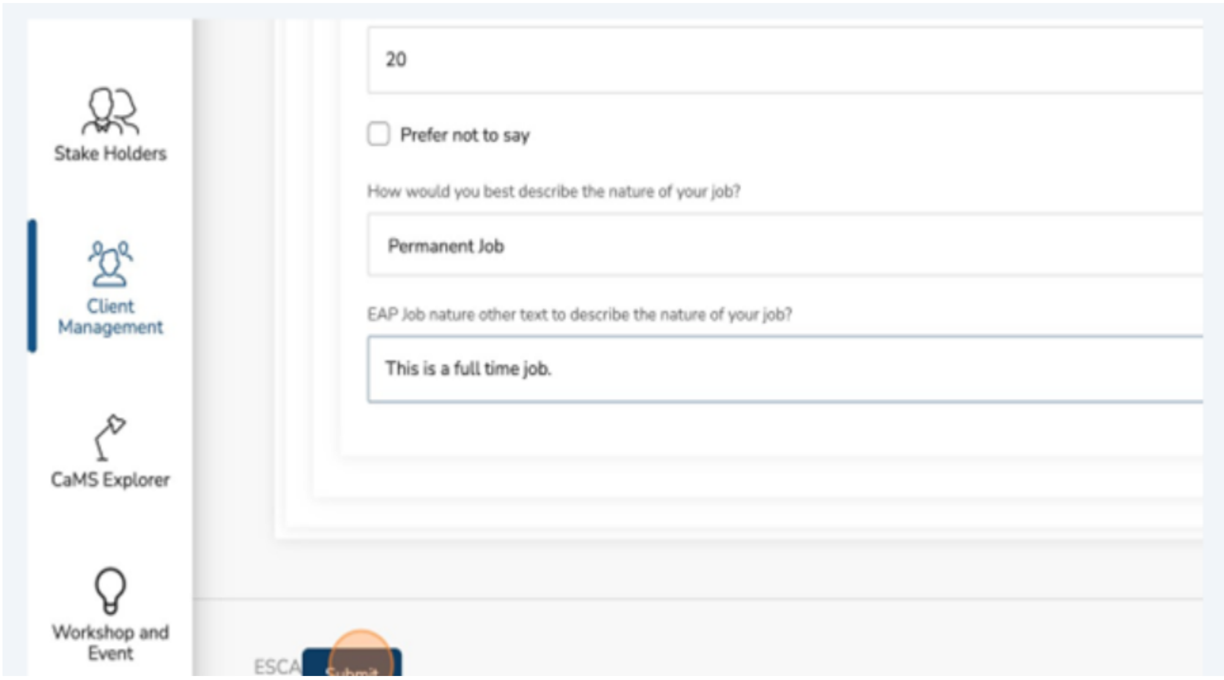


29. Click the “EAP job nature other text to describe the nature of your job” field.

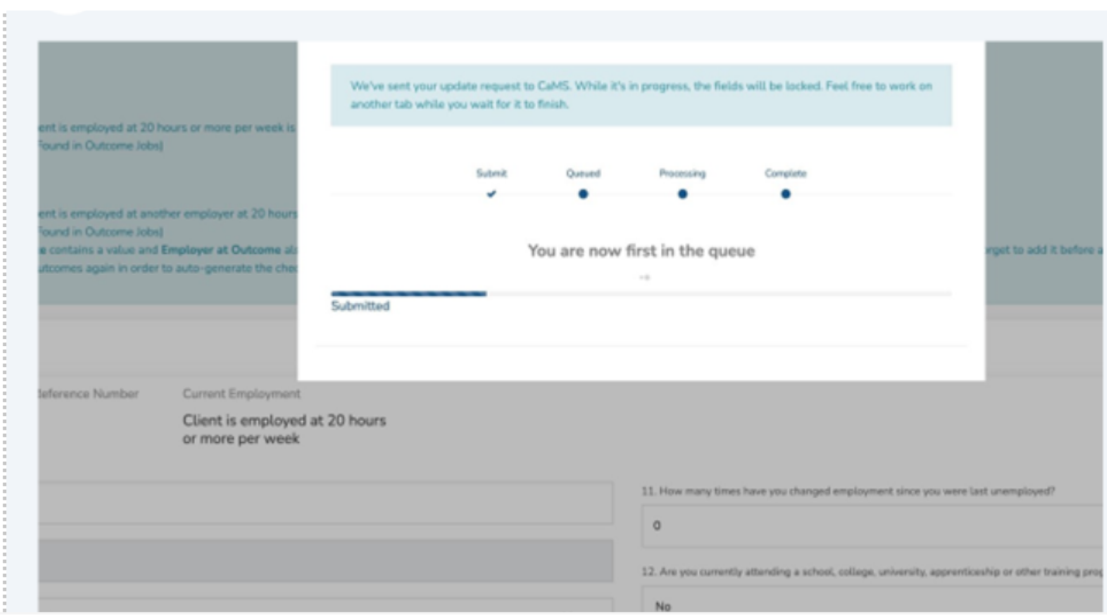


30. Input the appropriate answer.

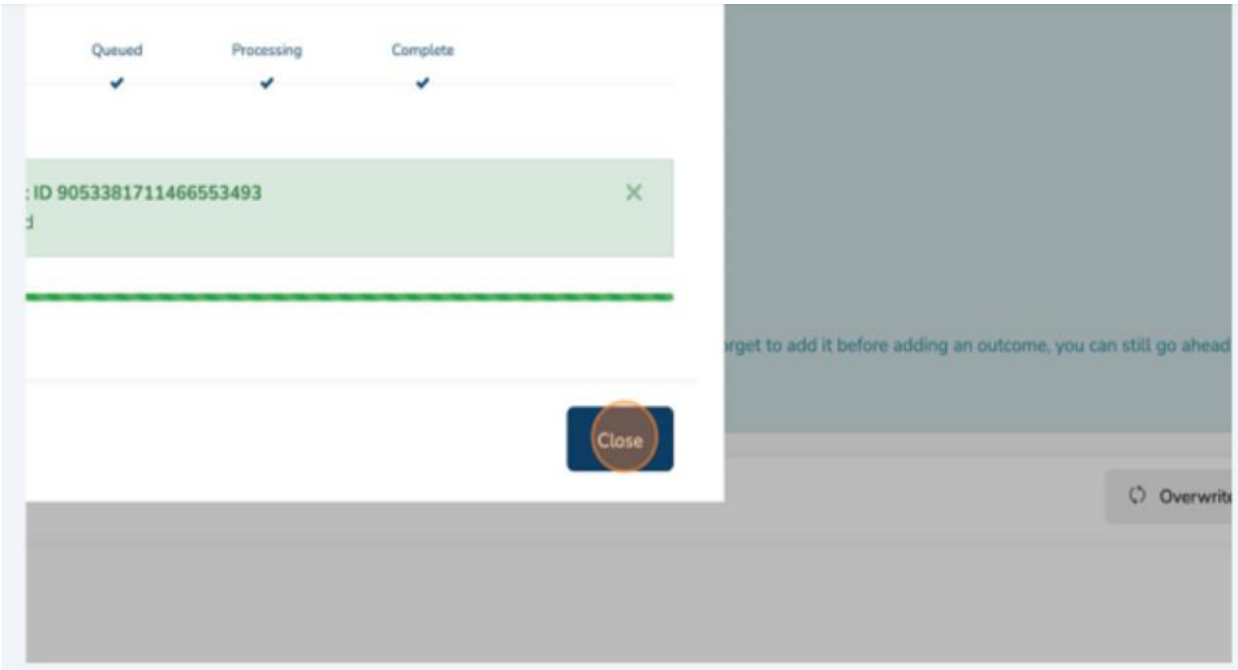
31. Click “Submit.”



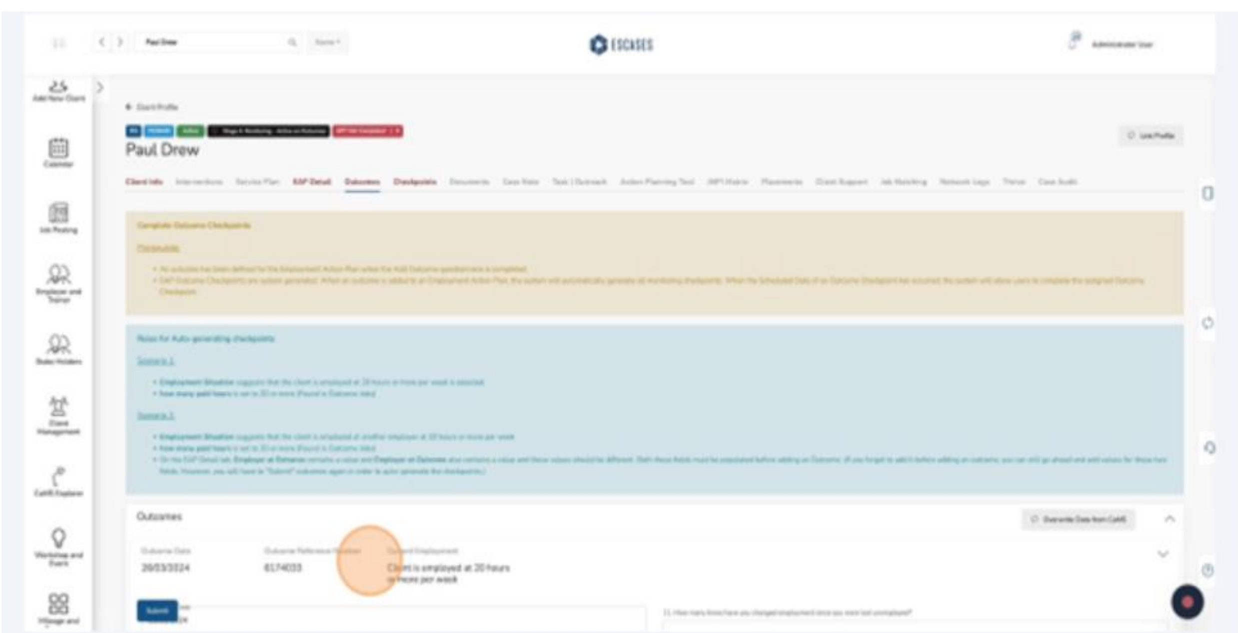
32. You will be placed in queue while CaMS processes the questionnaire.



33. Click “Close” when the success notification displays.

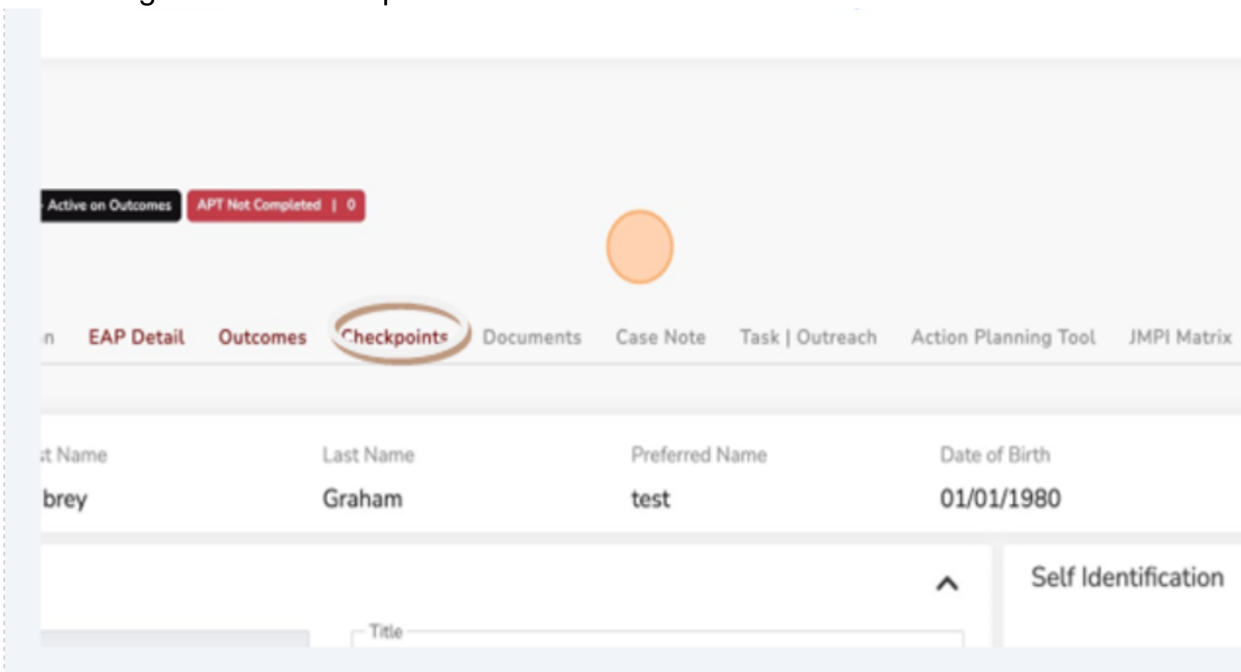


34. You have successfully submitted the Outcome.

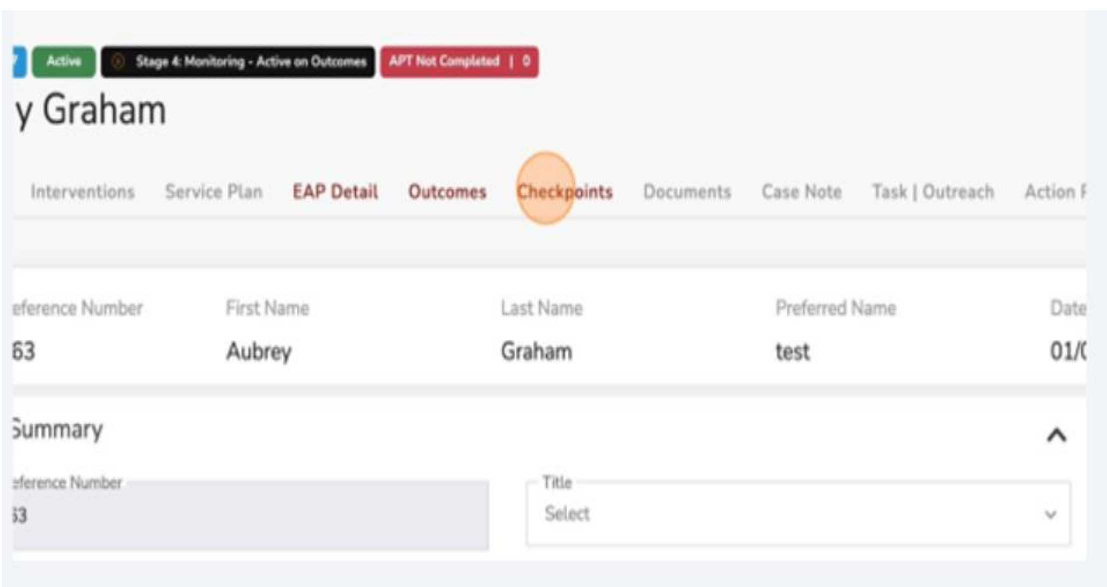


(16) Checkpoint and Document Upload

1. Navigate to the client profile.

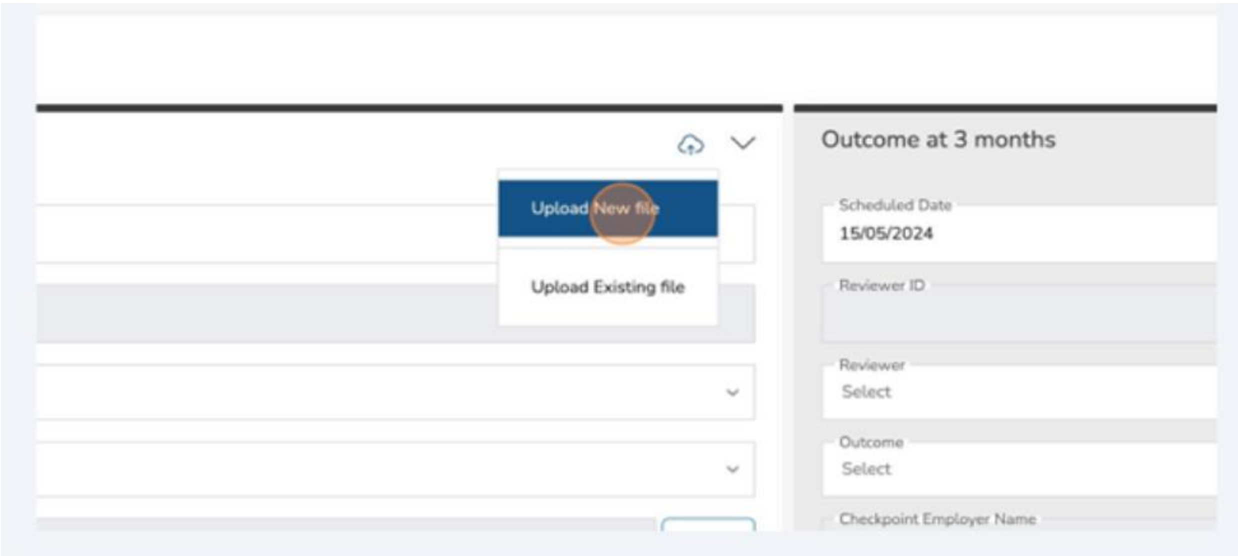


2. Click "Checkpoints."



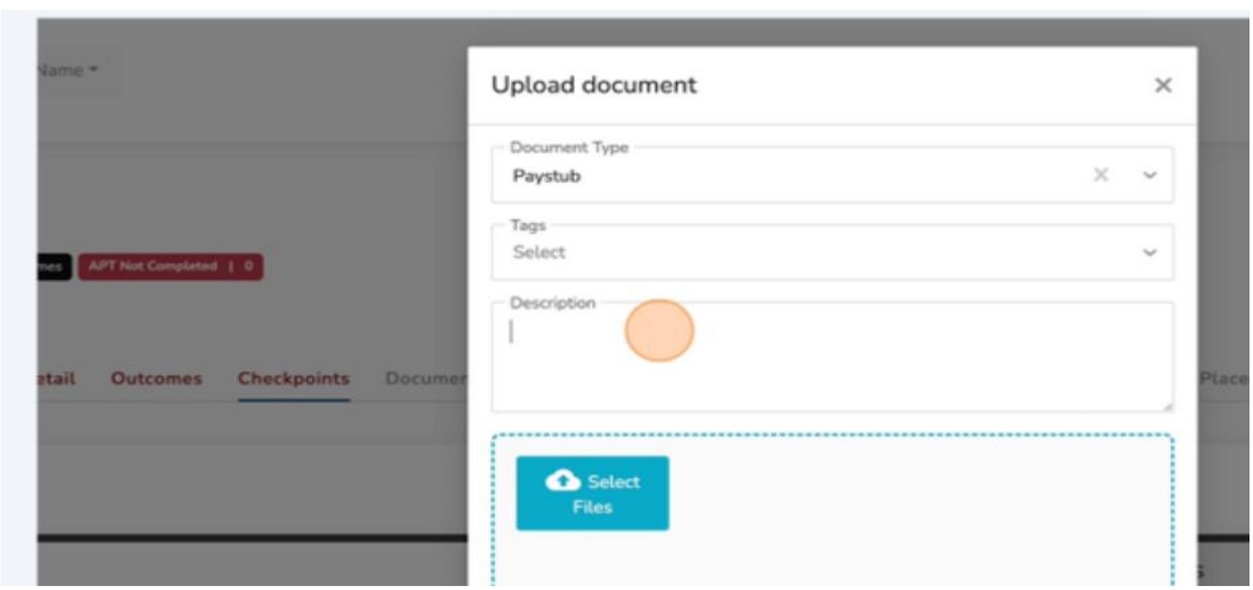
To upload proof of employment, complete the following steps:

3. Click “Upload New file.”



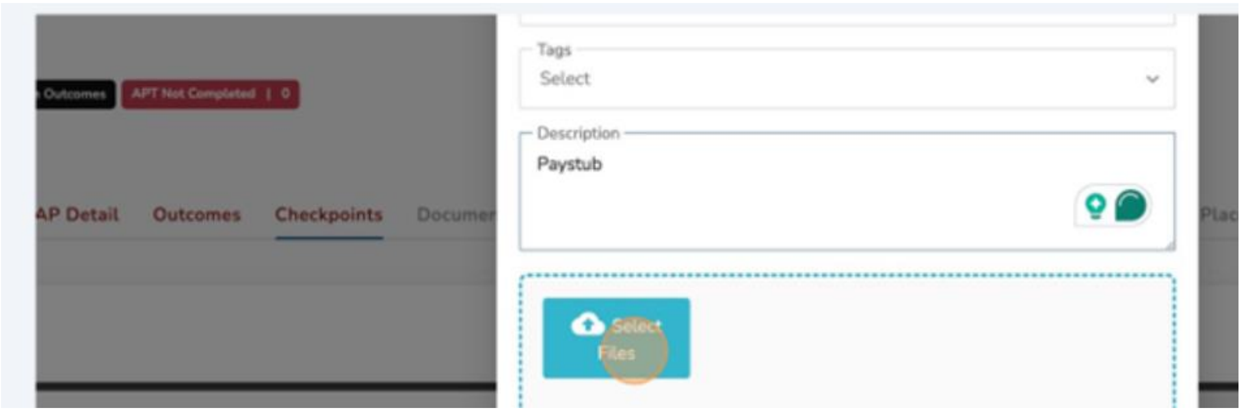
4. Select the appropriate “Document Type."

5. Click the “Description” field.

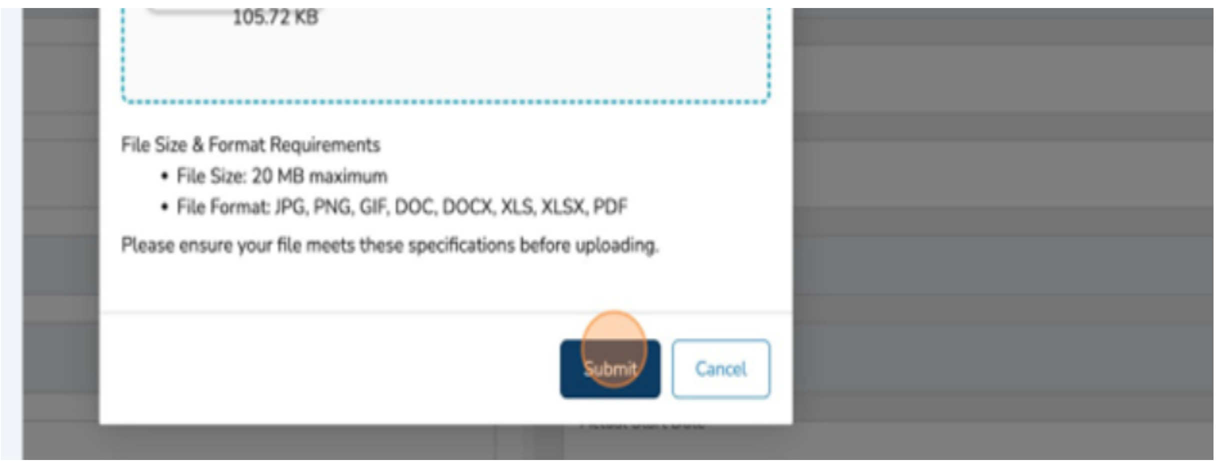


6. Input the appropriate description for the attachment.

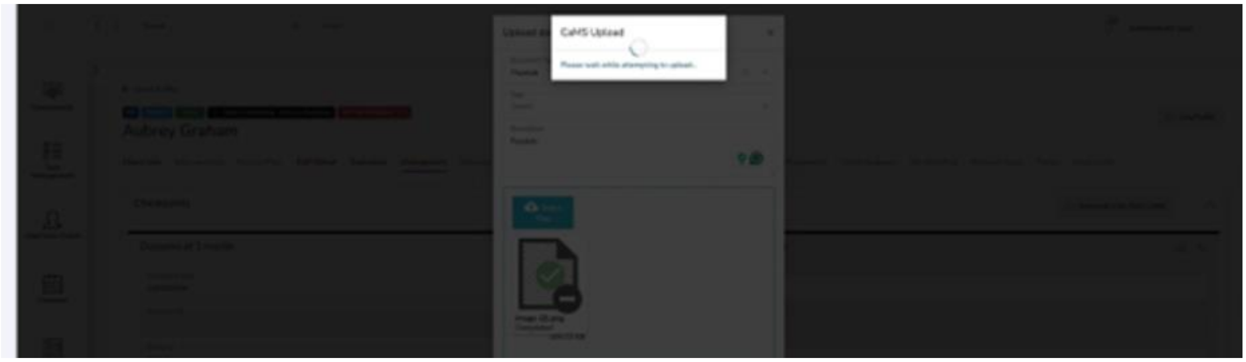
7. Click the “Select Files” button and select the appropriate attachment.



8. Click “Submit.”

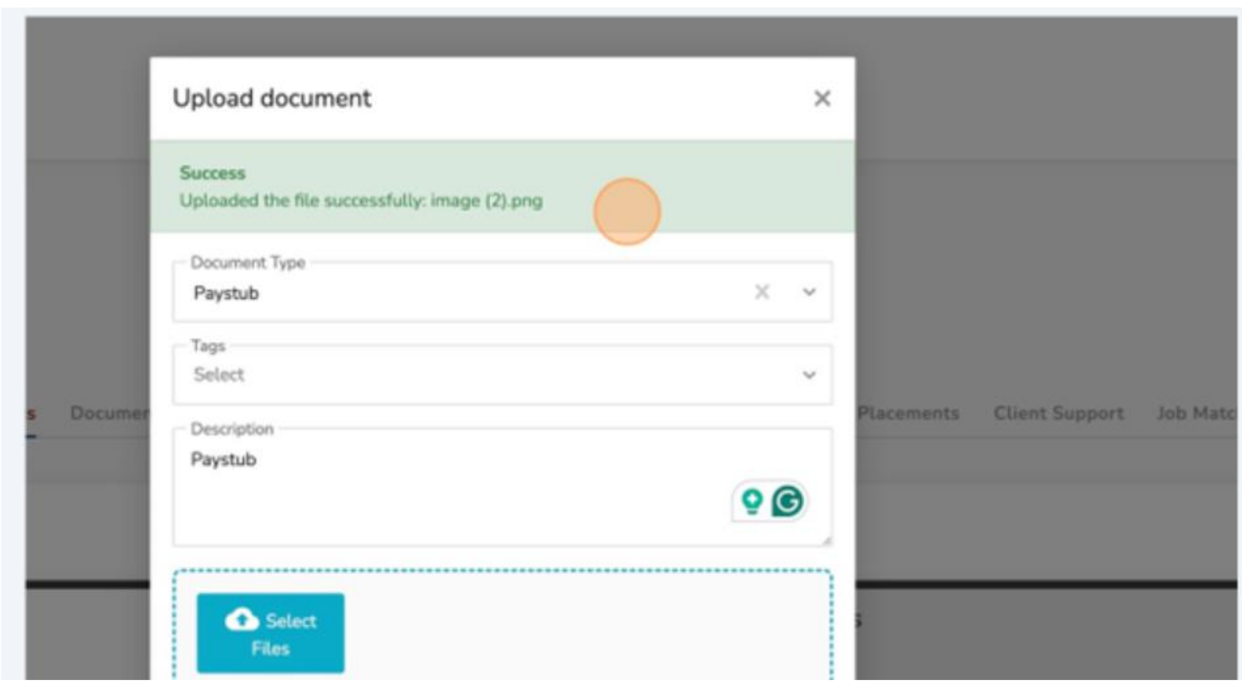


The attachment will be uploaded directly into CaMS.

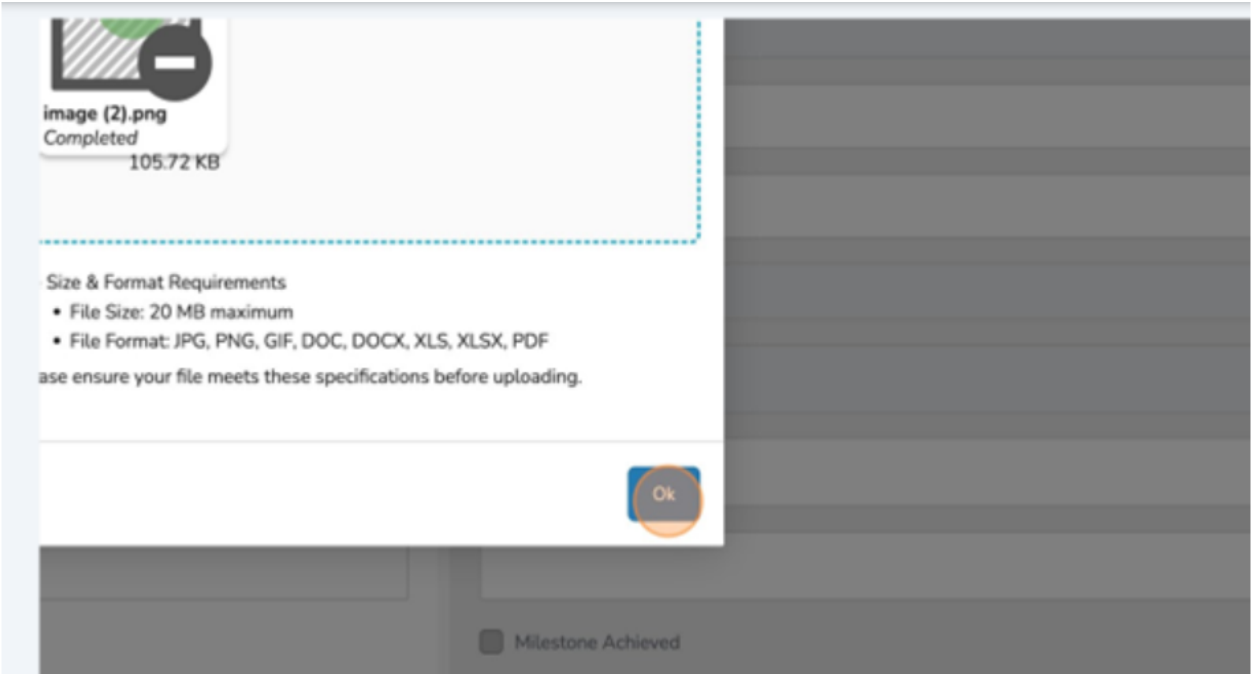


❖ Tip! Uploads directly into CaMS display a primary focus while the action is taking place to signify the importance.

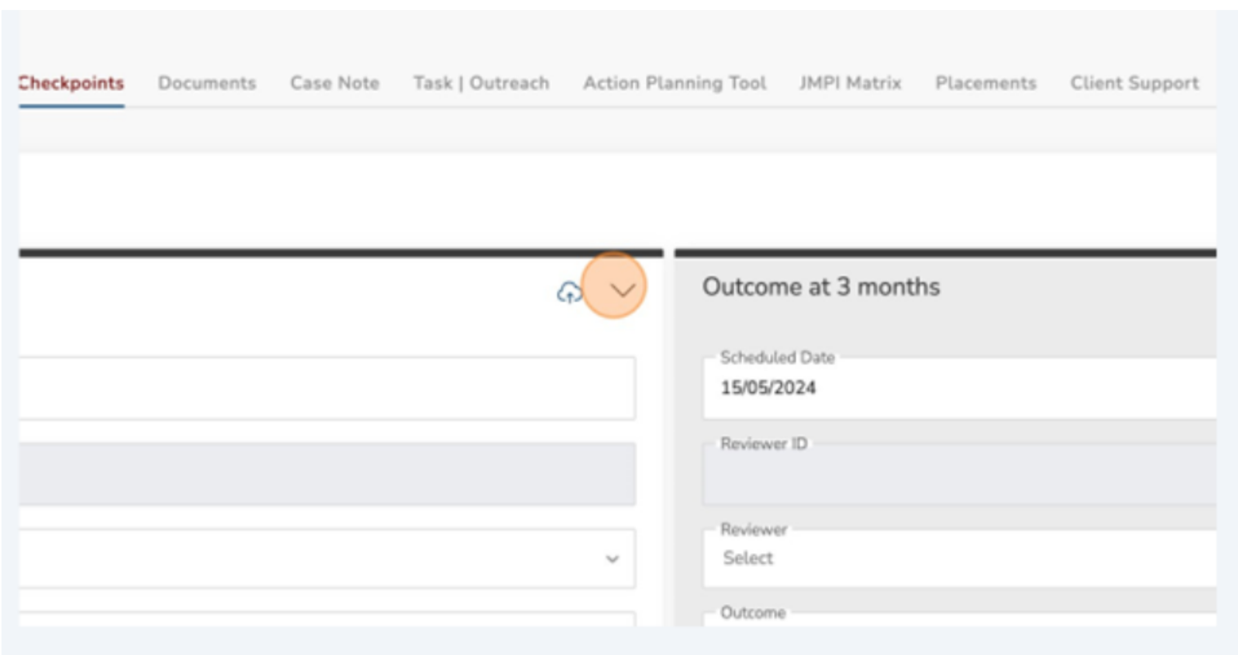
A success notification will be displayed.



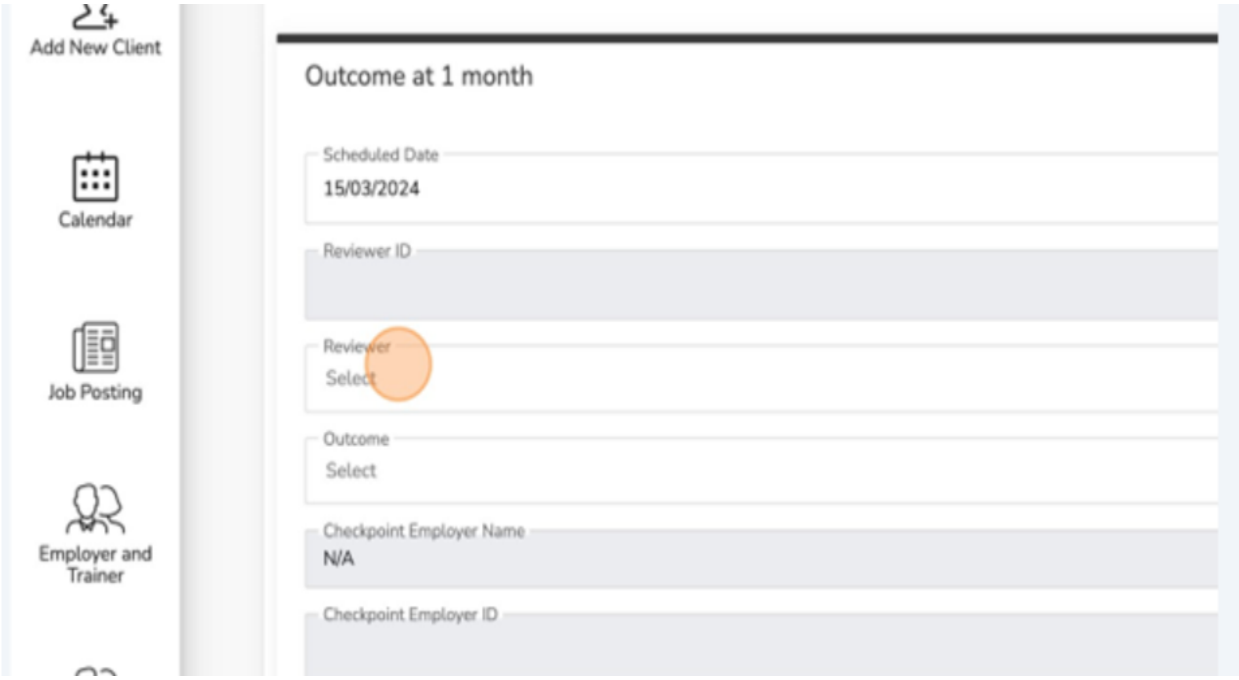
9. Click “OK.”



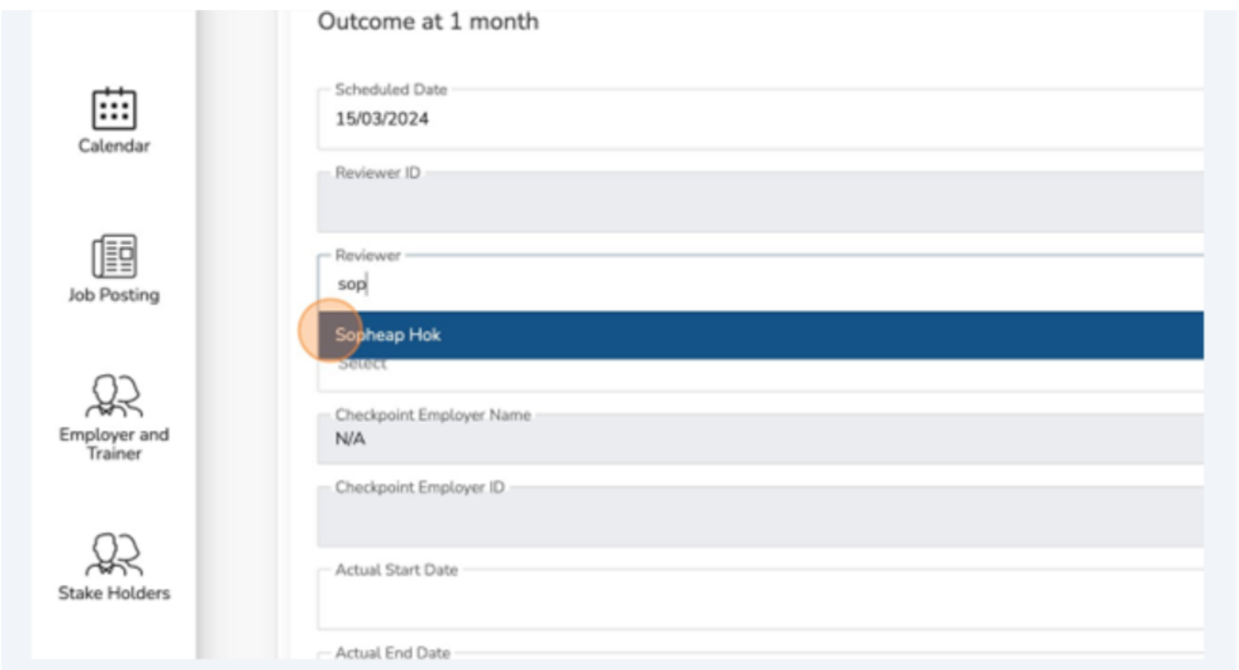
10. Click the chevron to expand the entire one-month questionnaire.



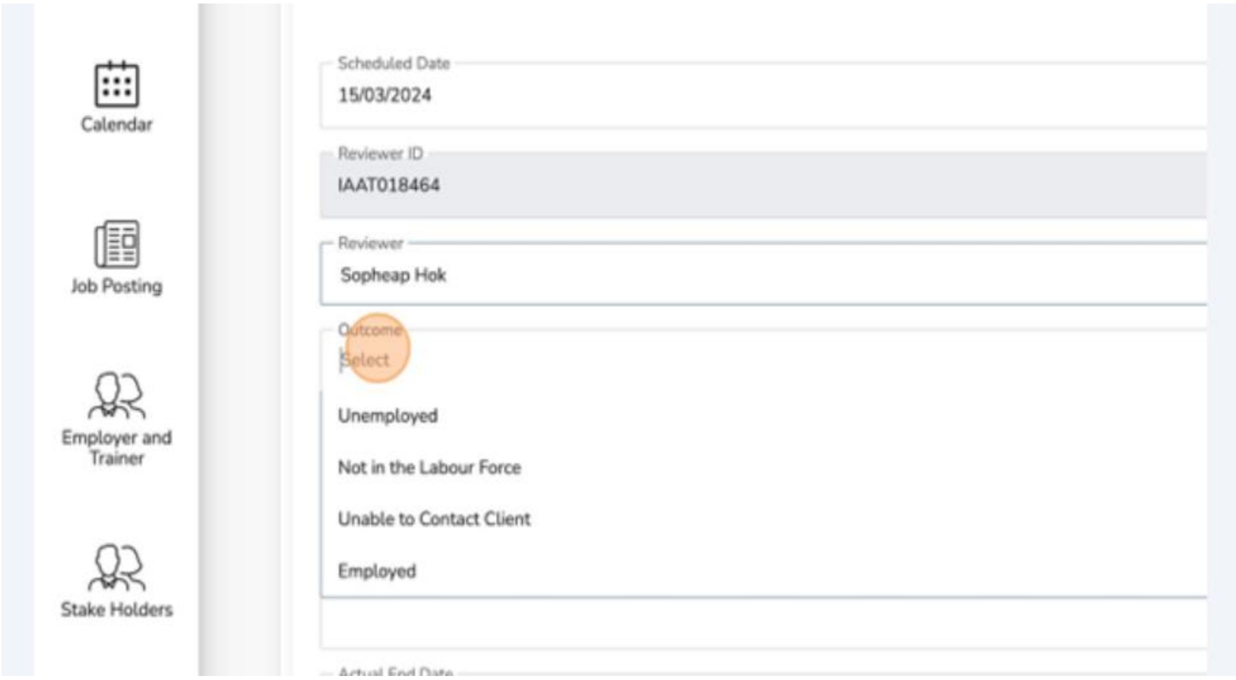
11. Click the “Reviewer” field.



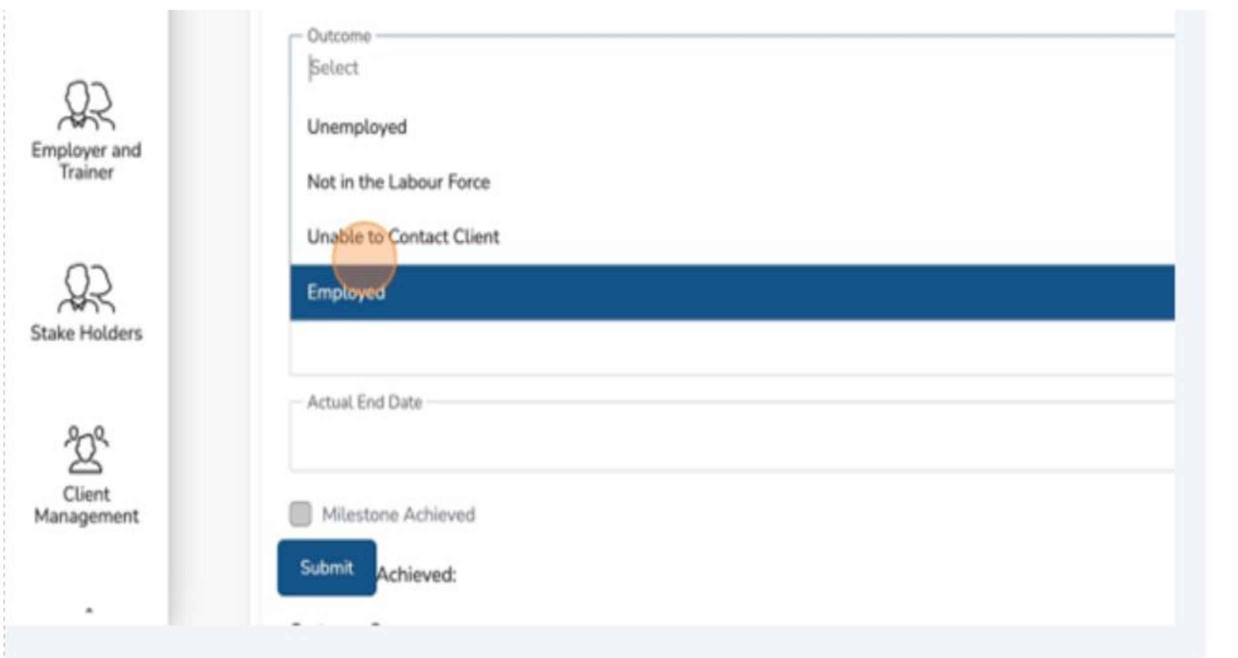
12. Select the appropriate “Reviewer.”



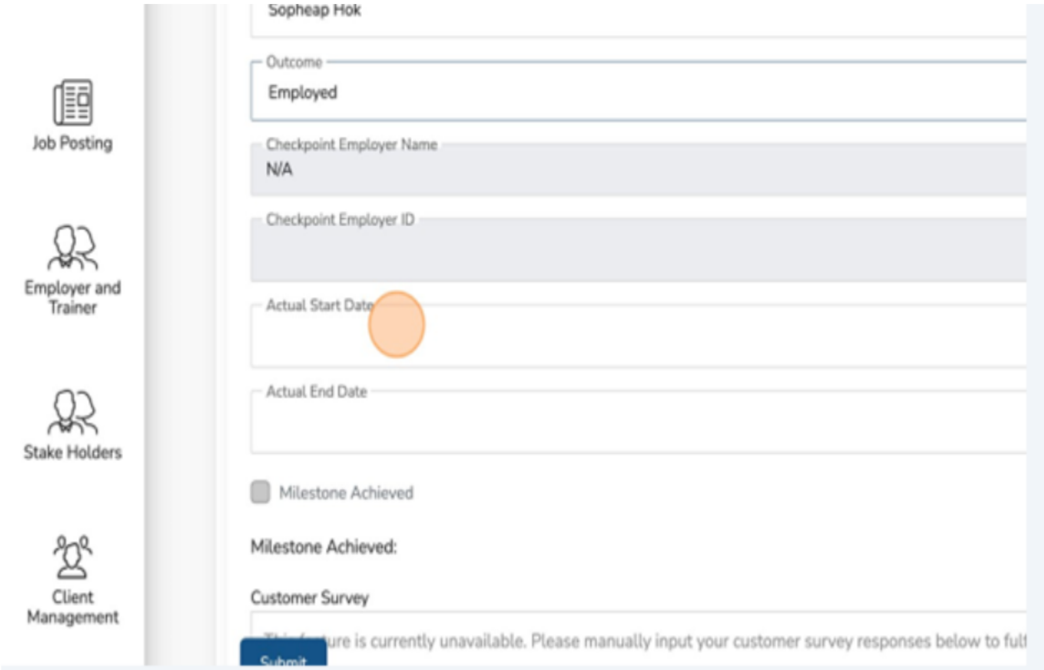
13. Click the “Outcome” field.



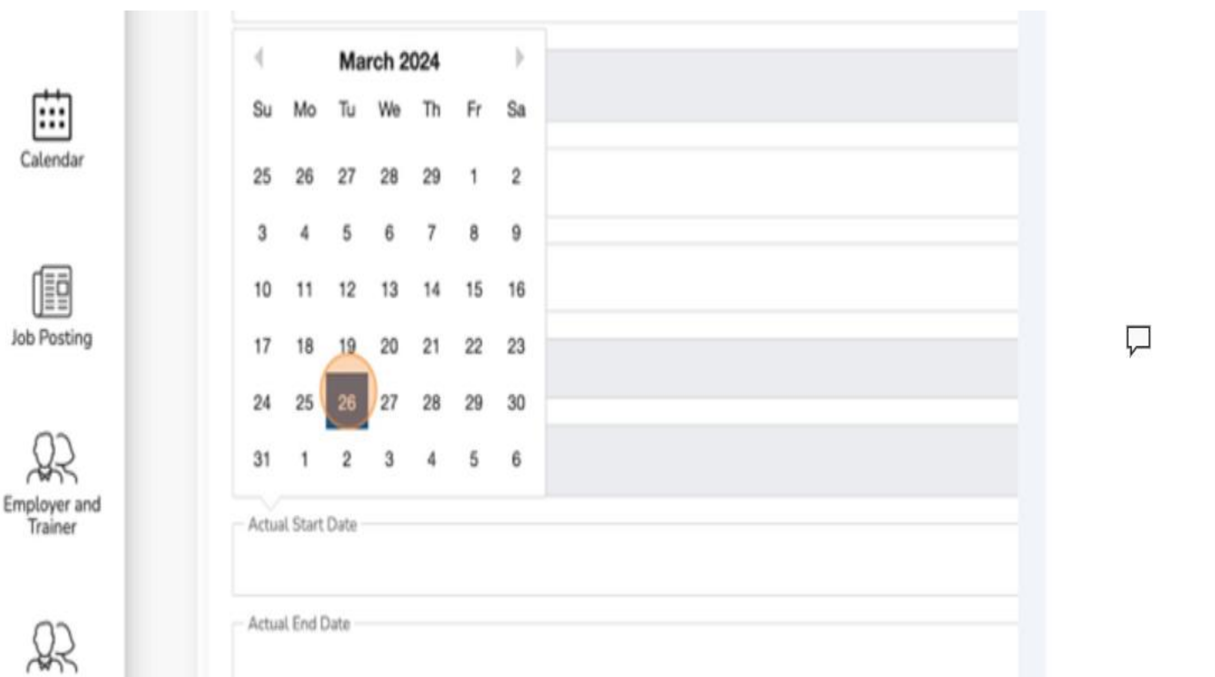
14. Select the appropriate “Outcome.”



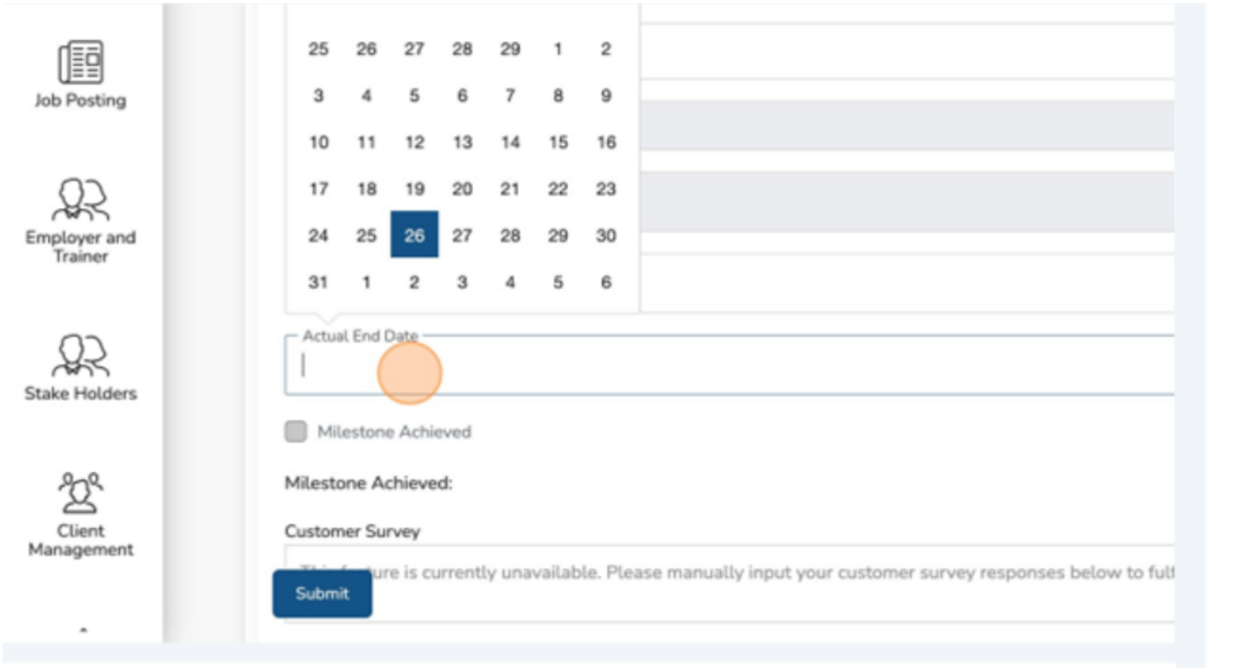
15. Click the "Actual Start Date."



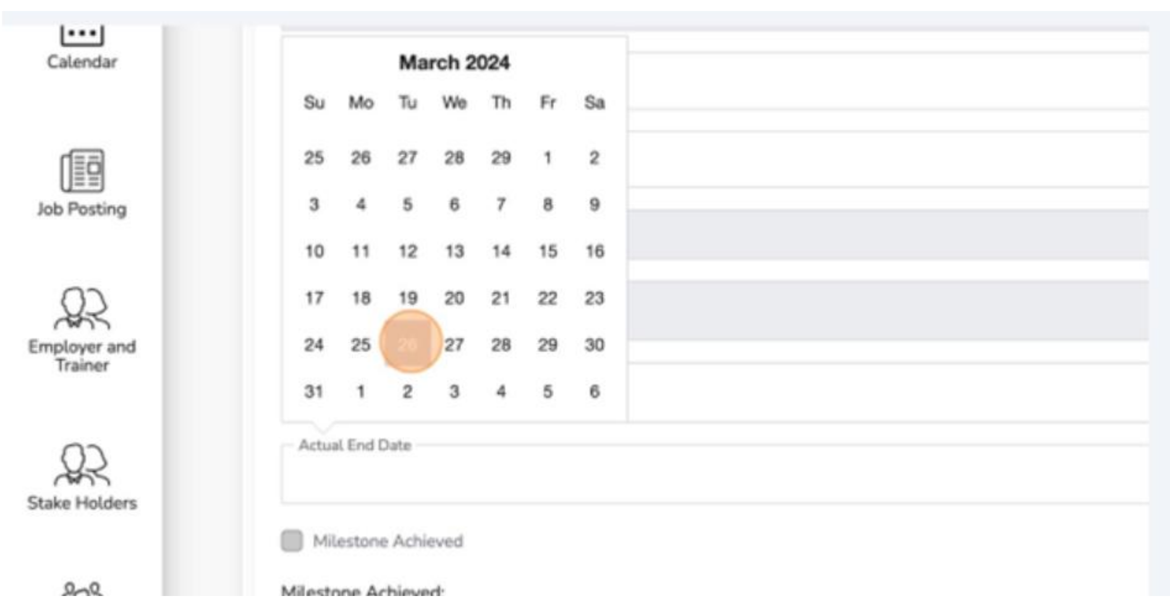
16. Select the appropriate start date.



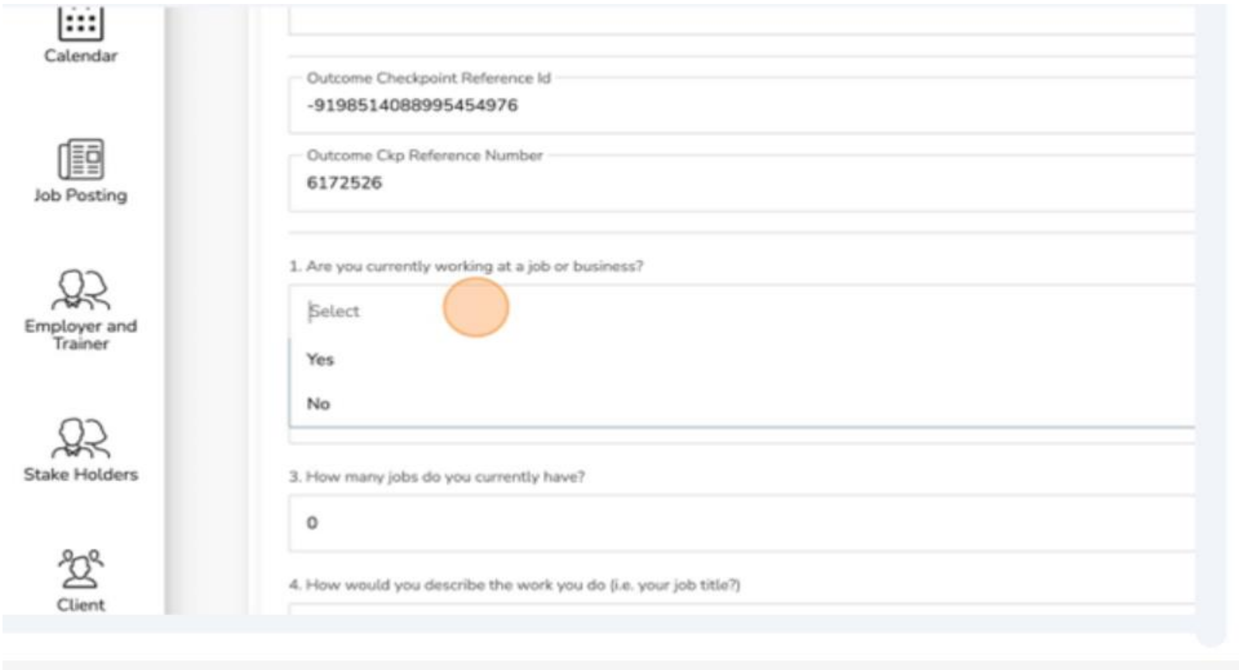
17. Click the “Actual End Date” field.



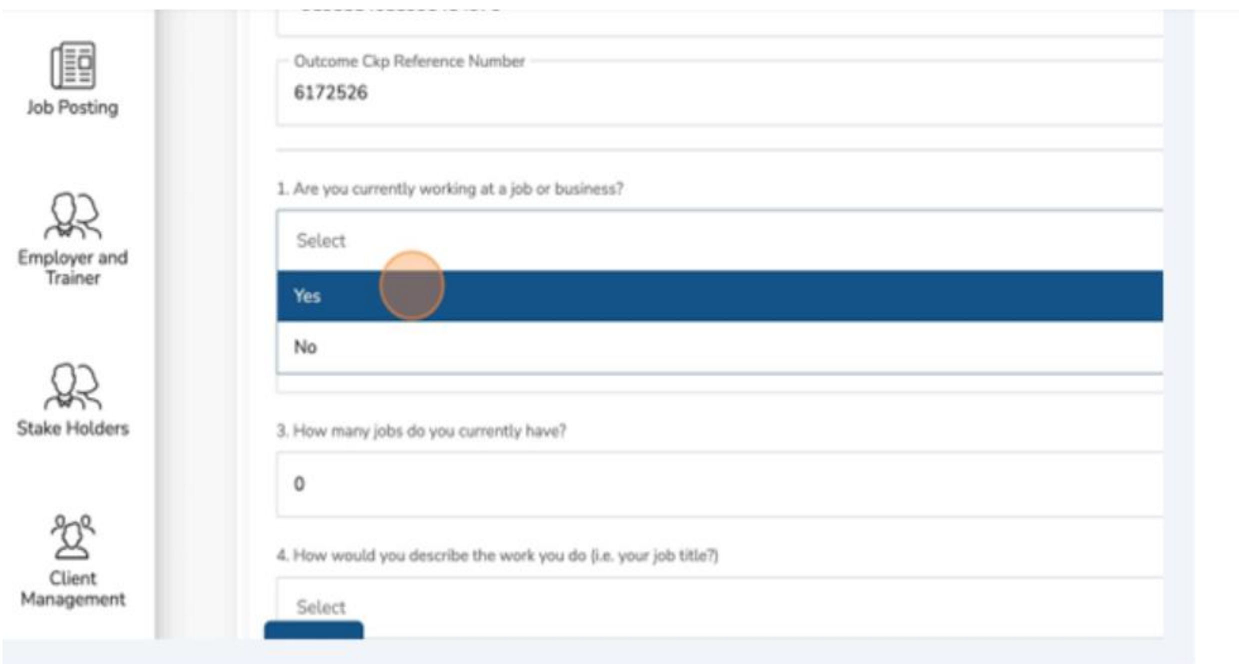
18. Enter the end date.



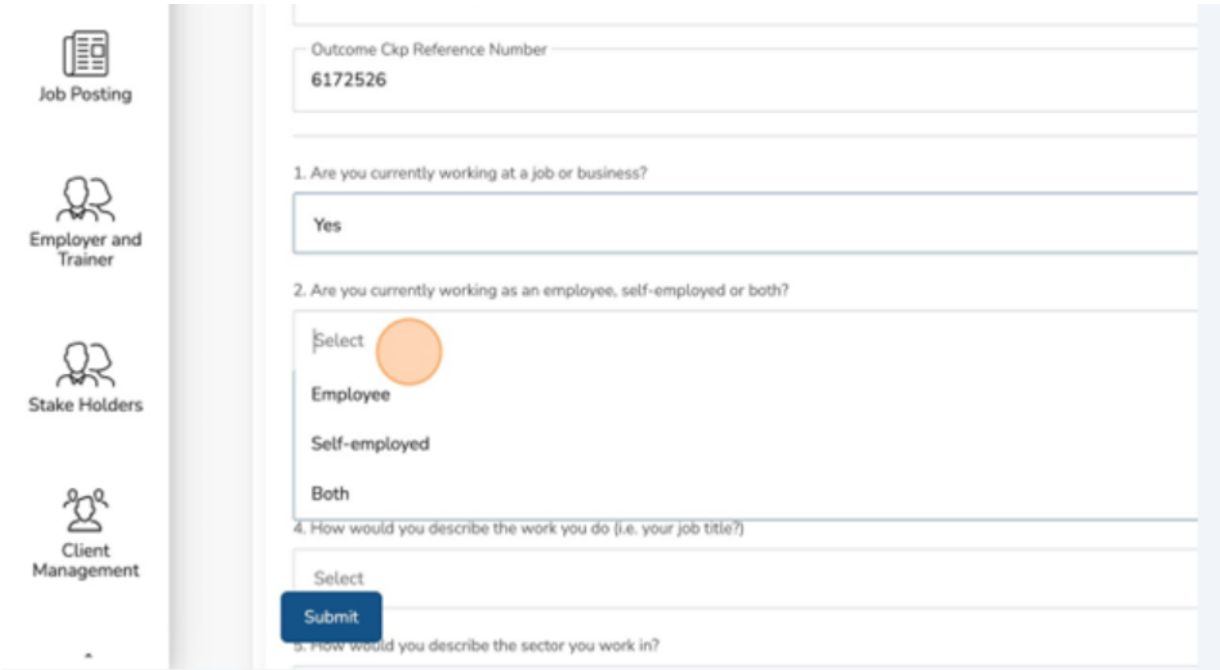
19. Click the “Are you currently working at a job or business” field.



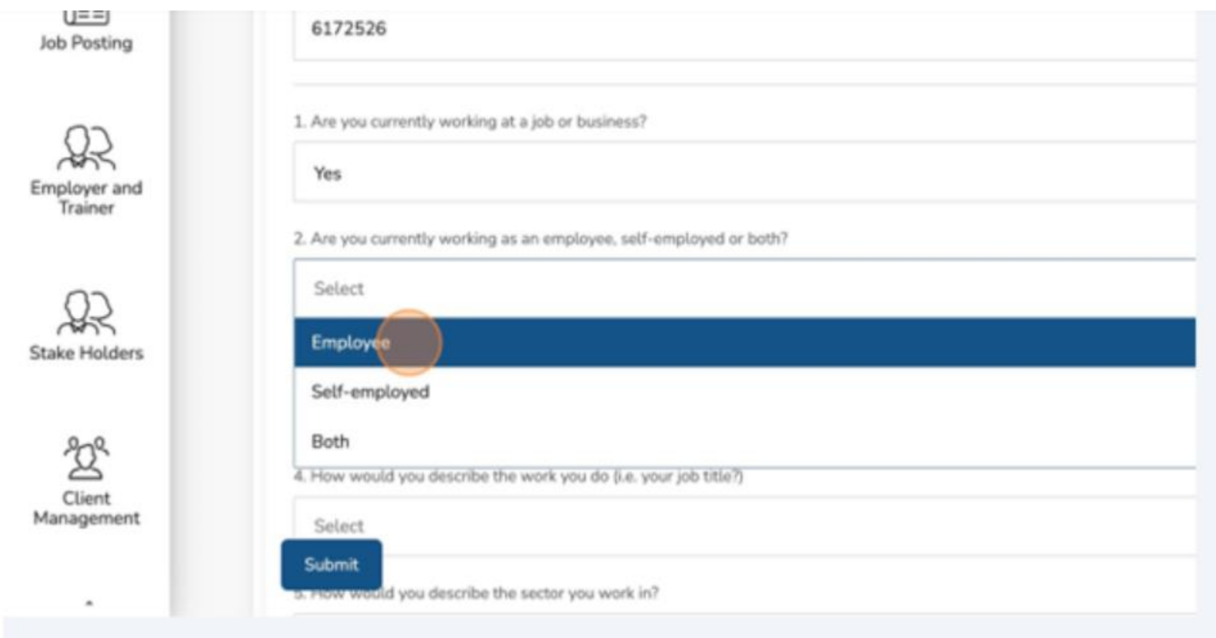
20. Select the appropriate answer.



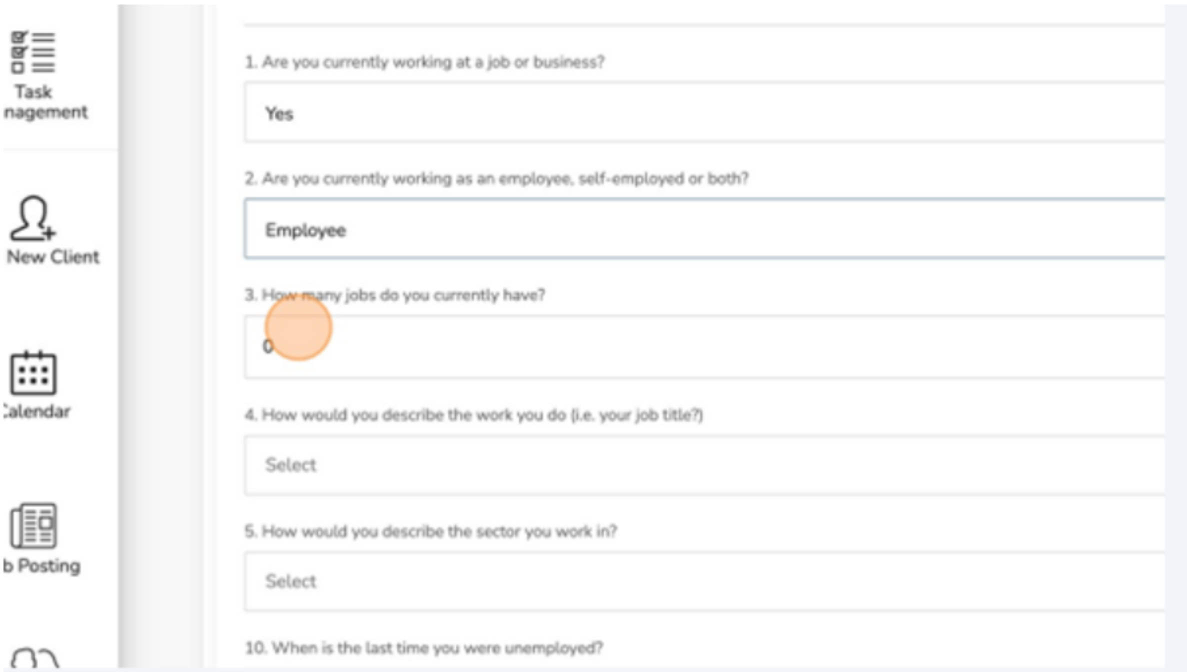
21. Click the “Are you currently working as an employee, self-employed, or both?” field.



22. Select the appropriate answer.

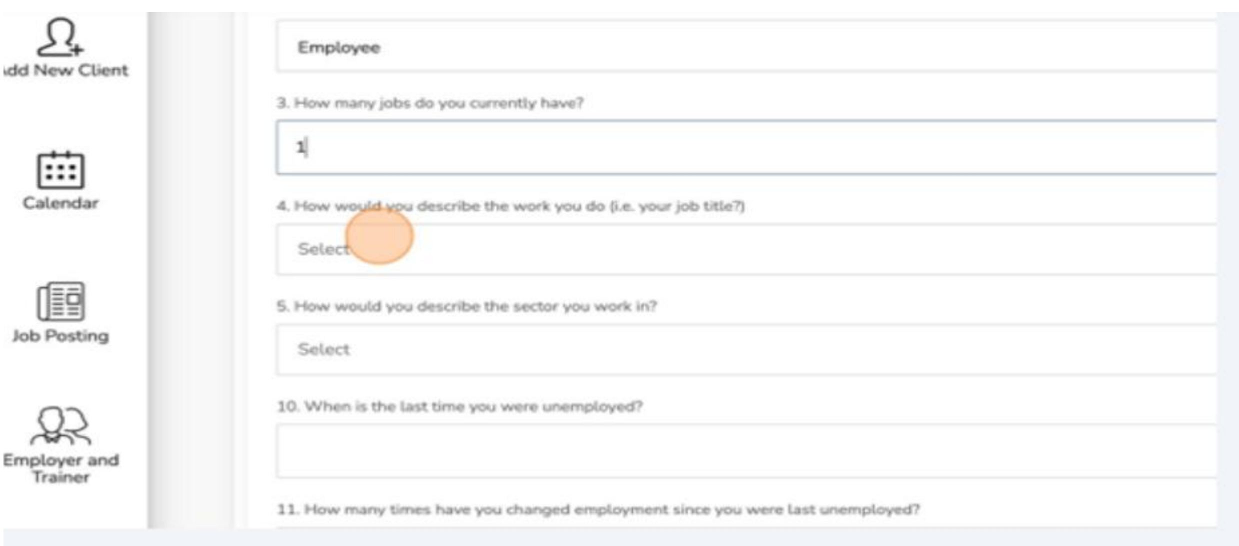


23. Click the “How many jobs do you currently have?” field.



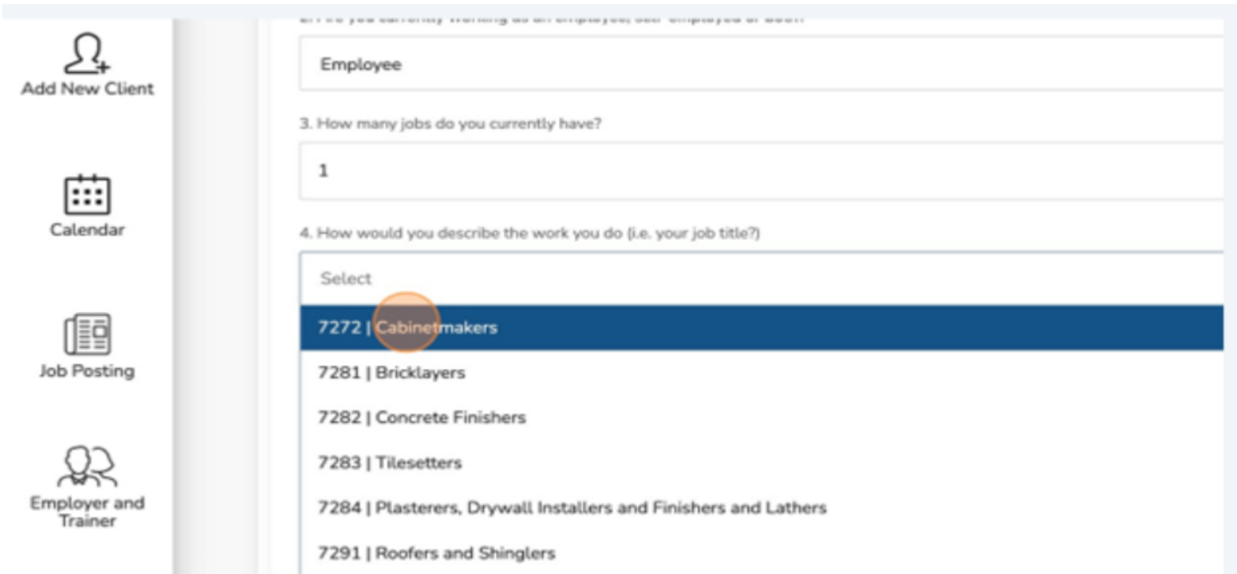
24. Insert the appropriate answer.

25. Click the “How would you describe the work you do?” field.

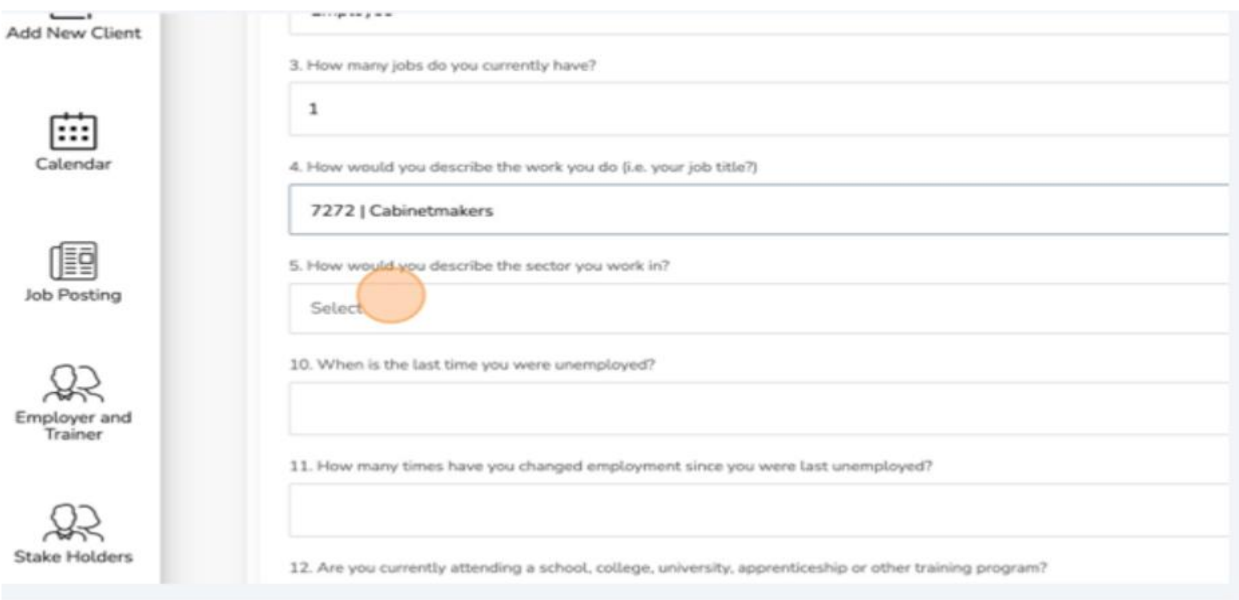


26. Select the appropriate answer

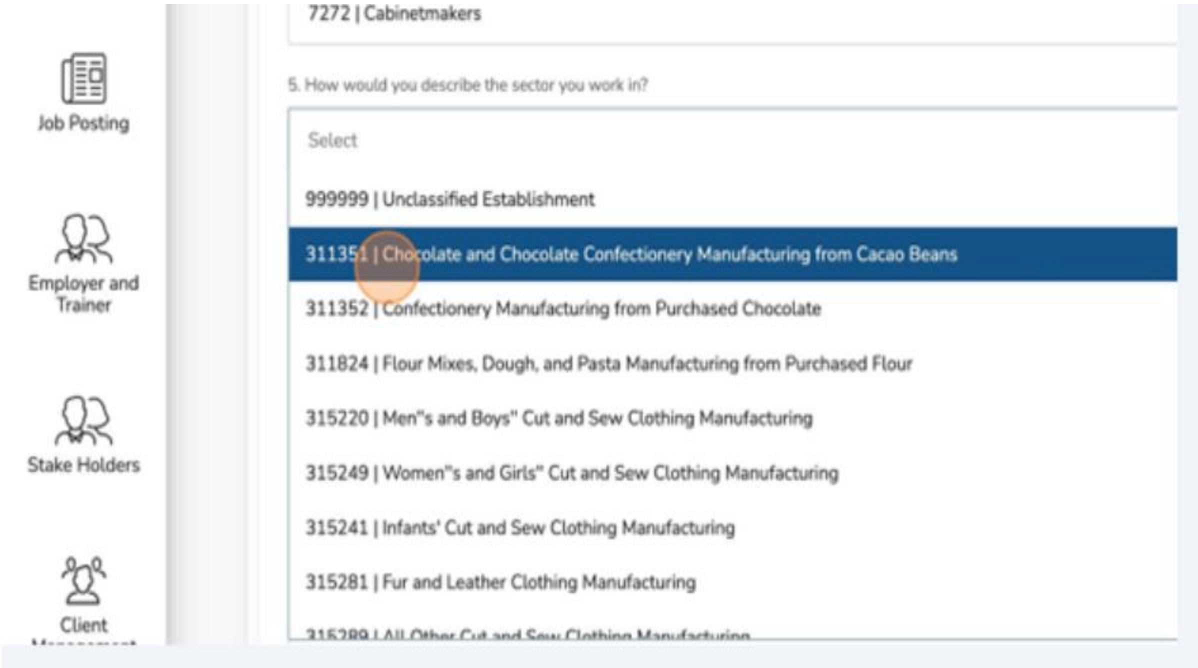
27. Select the appropriate NOC.



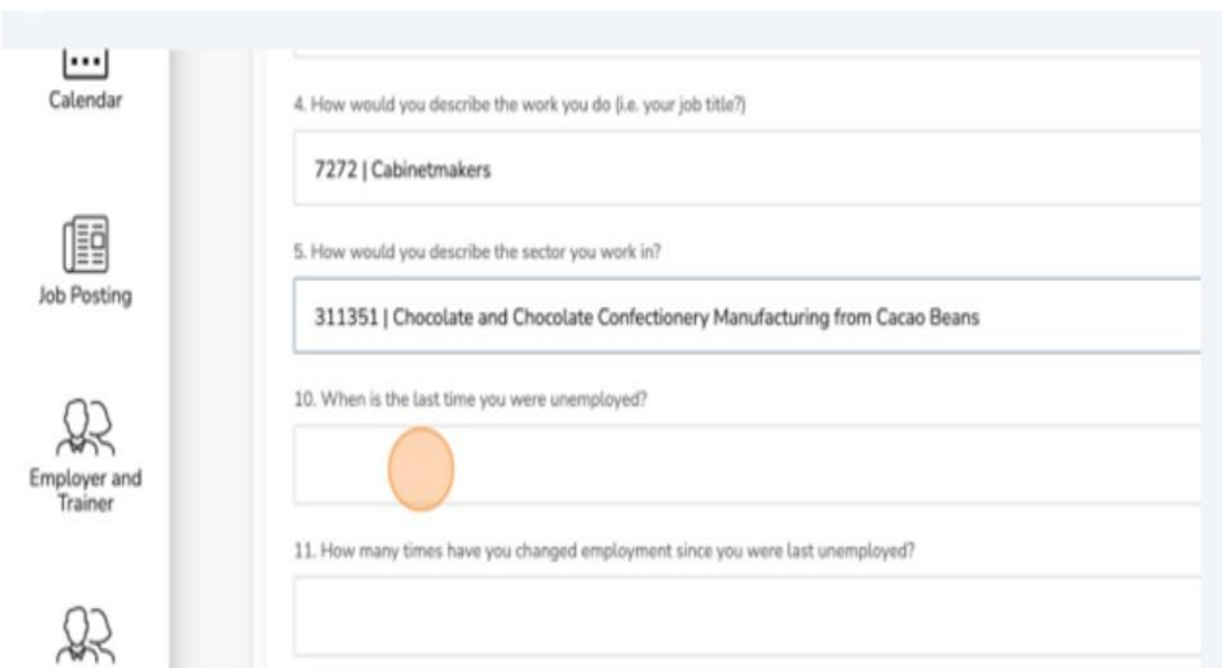
28. Click the “How would you describe the sector you work in?” field.



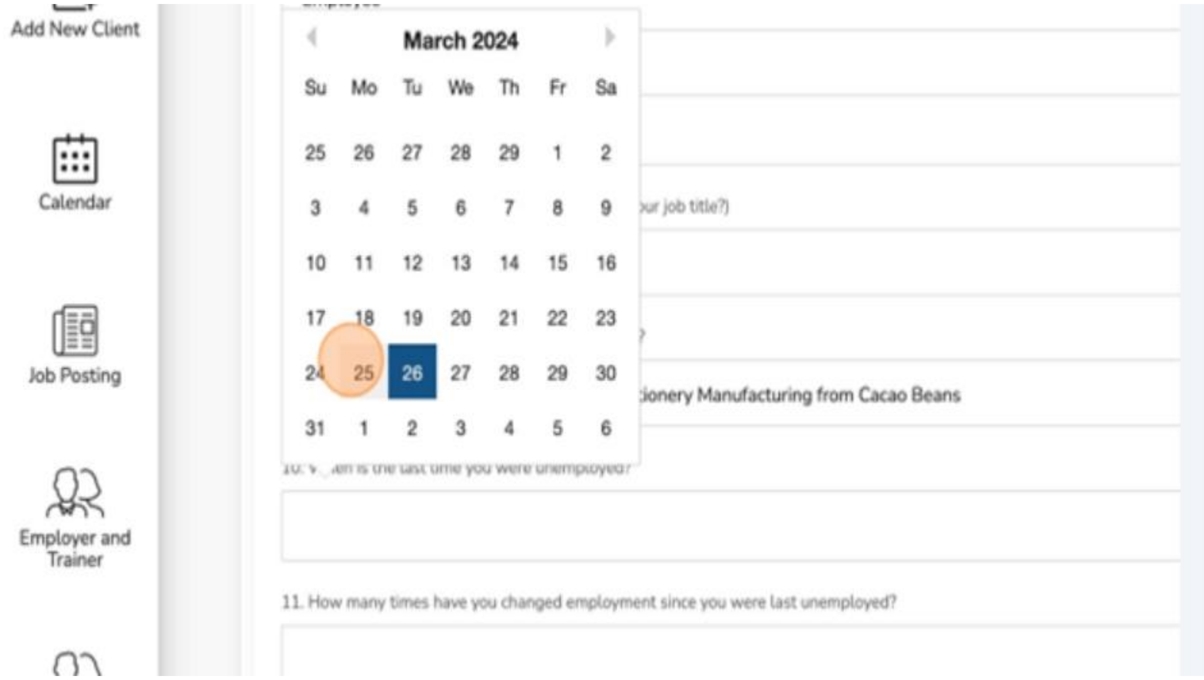
29. Select the appropriate sector.



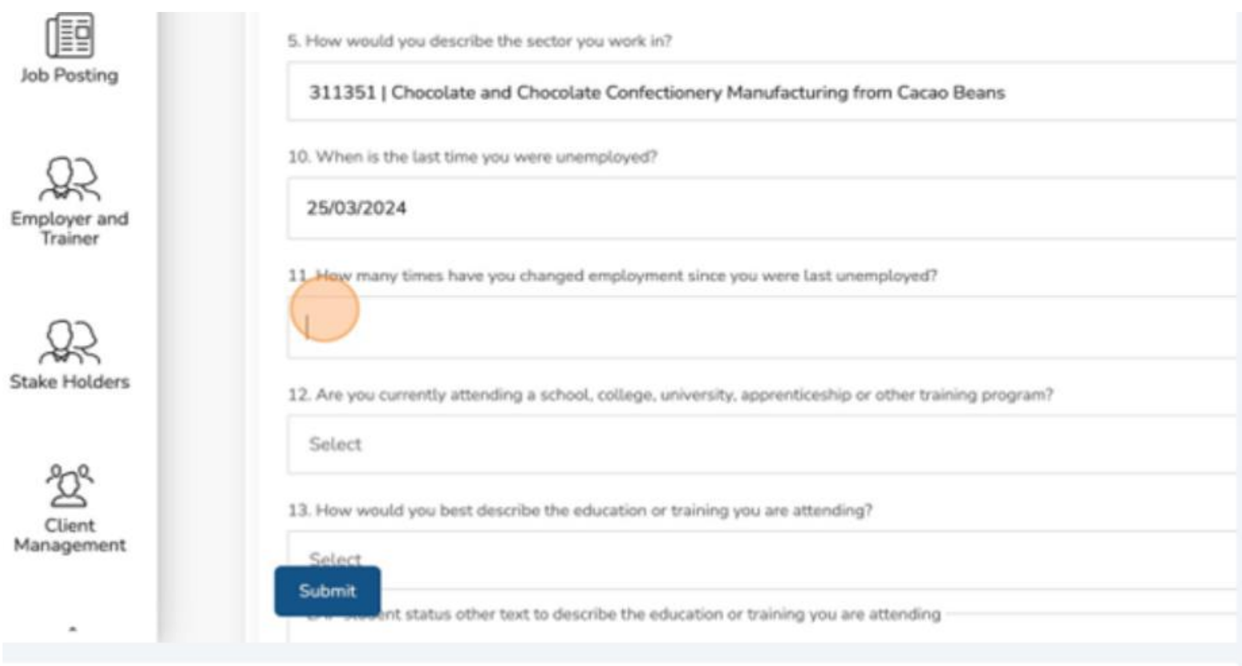
30. Click the “When is the last time you were unemployed?” field.



31. Select the appropriate date.

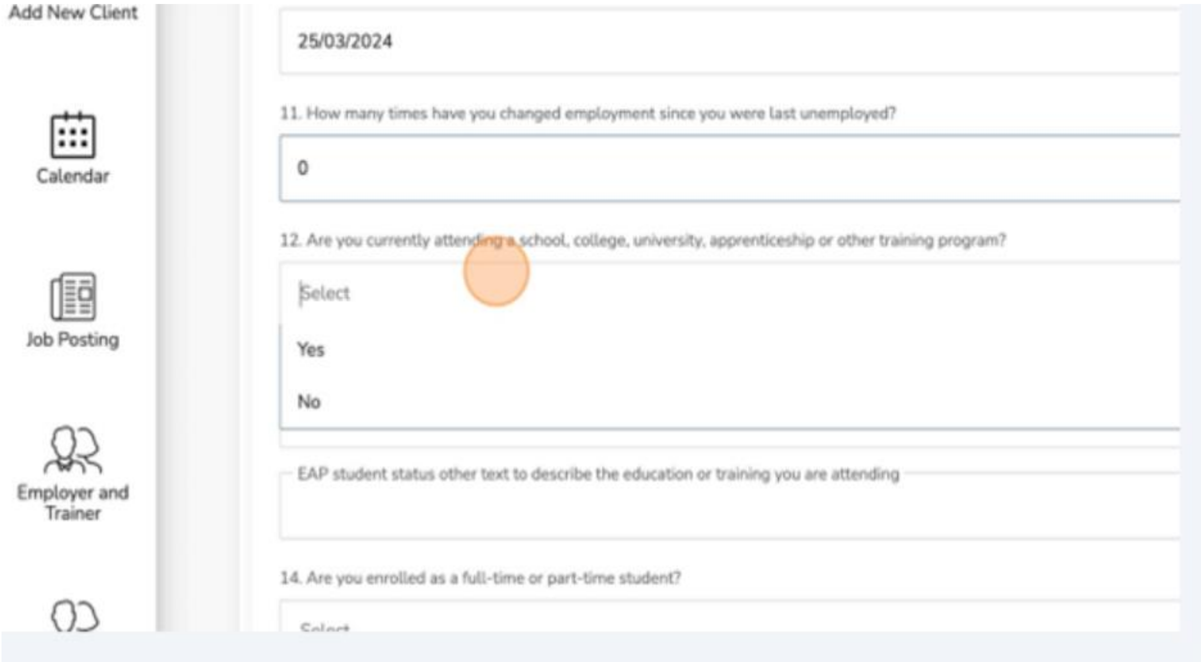


32. Click the “How many times have you changed employment since you were last employed?” field.



33. Enter the appropriate number.

34. Click the “Are you currently attending a school, college, or university...?” field.

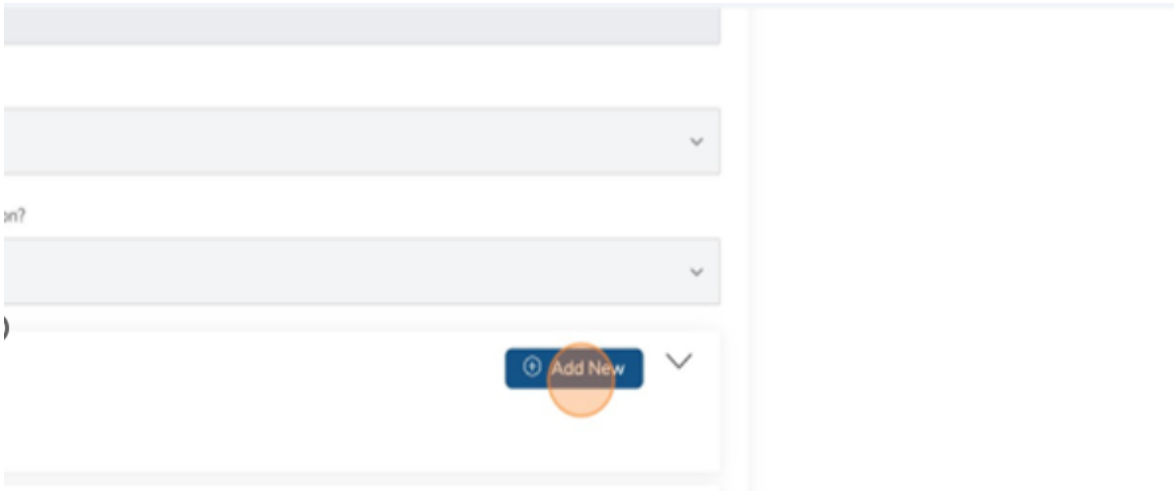


35. Select the appropriate answer.

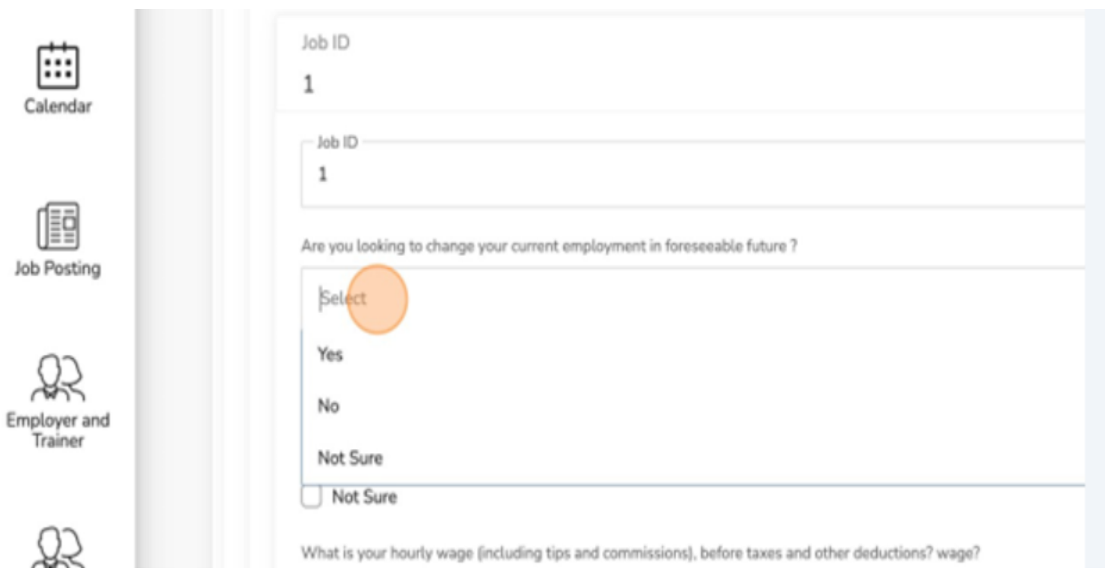
❖ Tip: The questions vary as they are guided by conditional logic. This means certain questions will only appear based on specific answers being supplied.

➢ Alert! Should your response to Question 3 (How many jobs do you currently have?) be one or more, it is mandatory to fill out the Checkpoints Jobs section of the questionnaire for each job held. Please complete an additional Checkpoints Jobs questionnaire for every job you report.

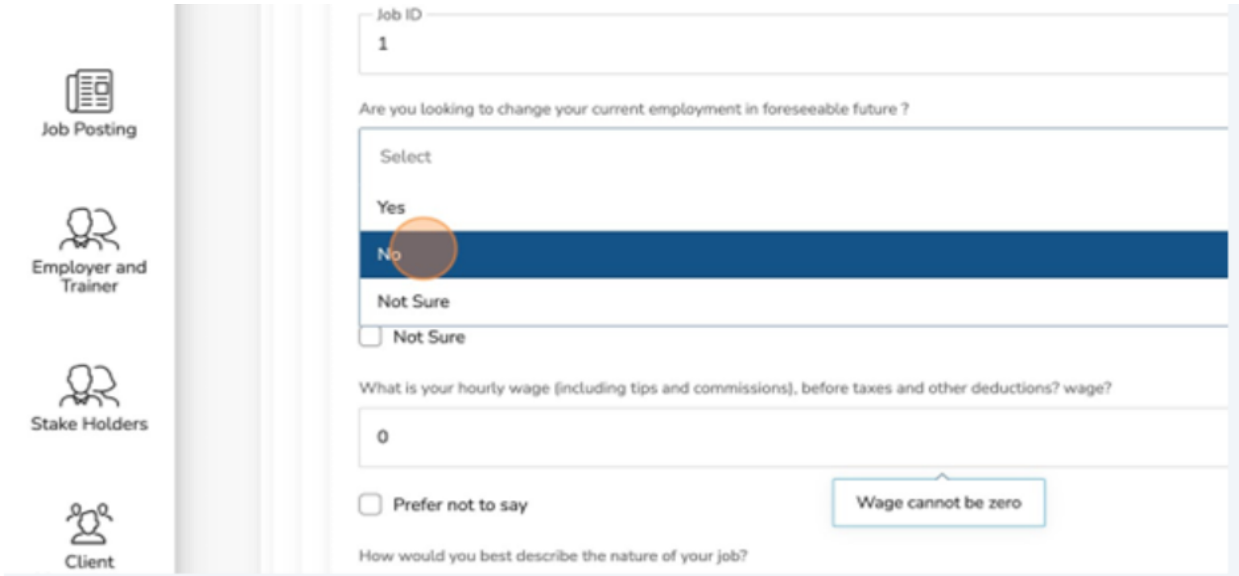
36. If the client has more than one job, click “Add New.”



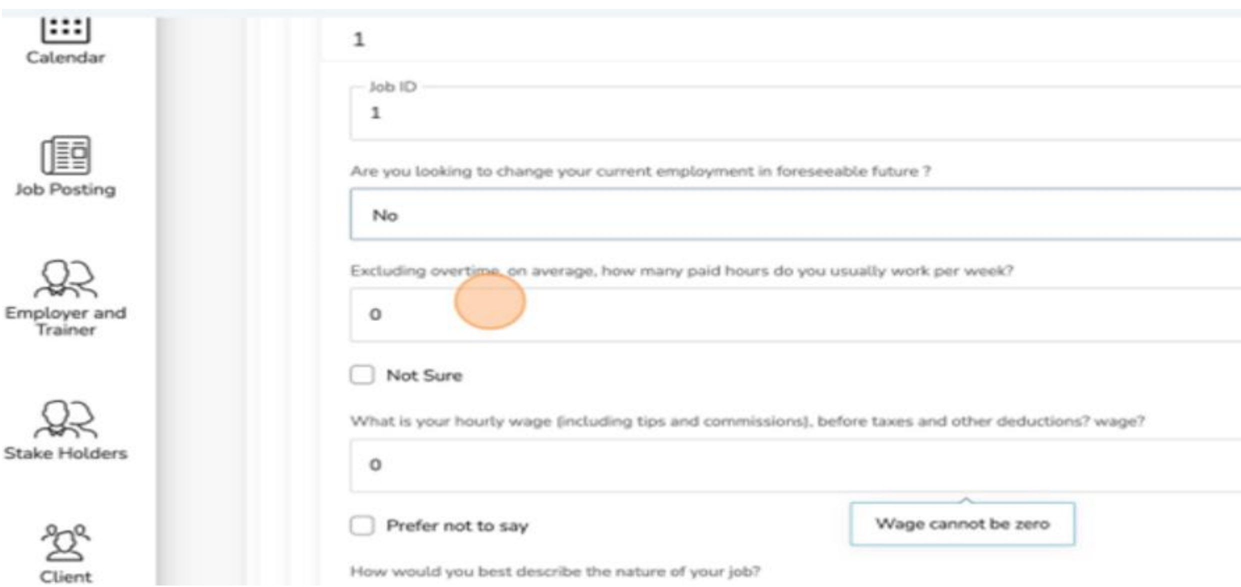
37. Click the “Are you looking to change your current employment in the foreseeable future?” field.



38. Select the appropriate answer.

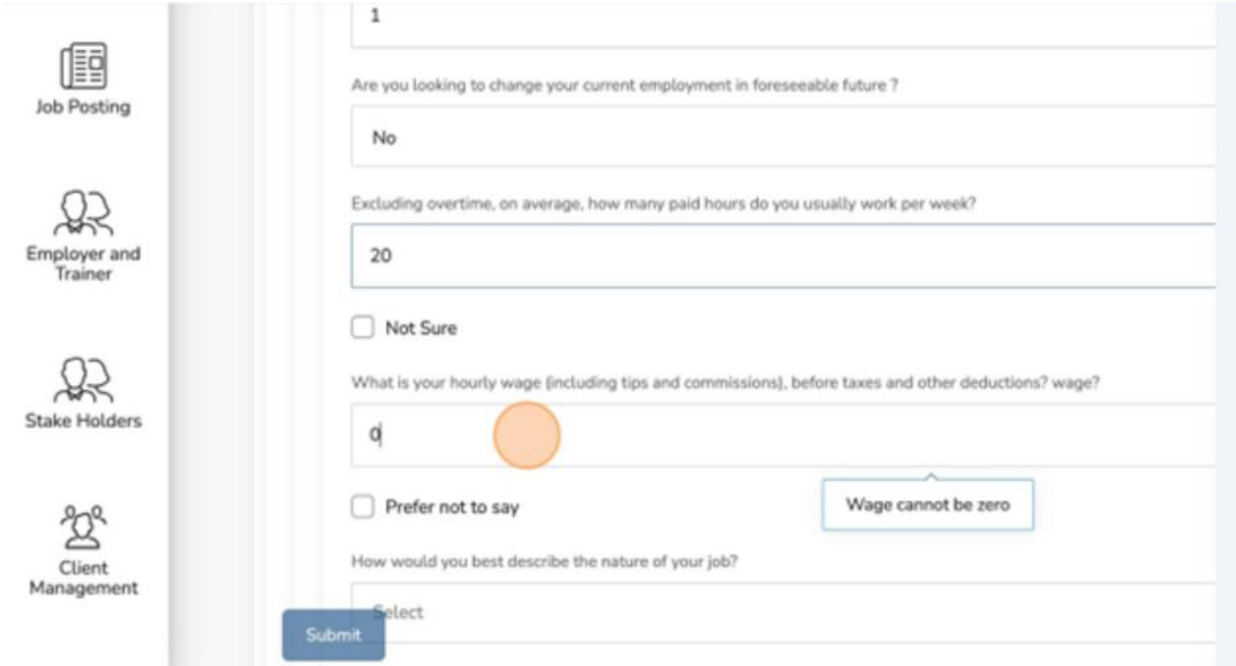


39. Click the “Excluding overtime, on average how many.......?” field.



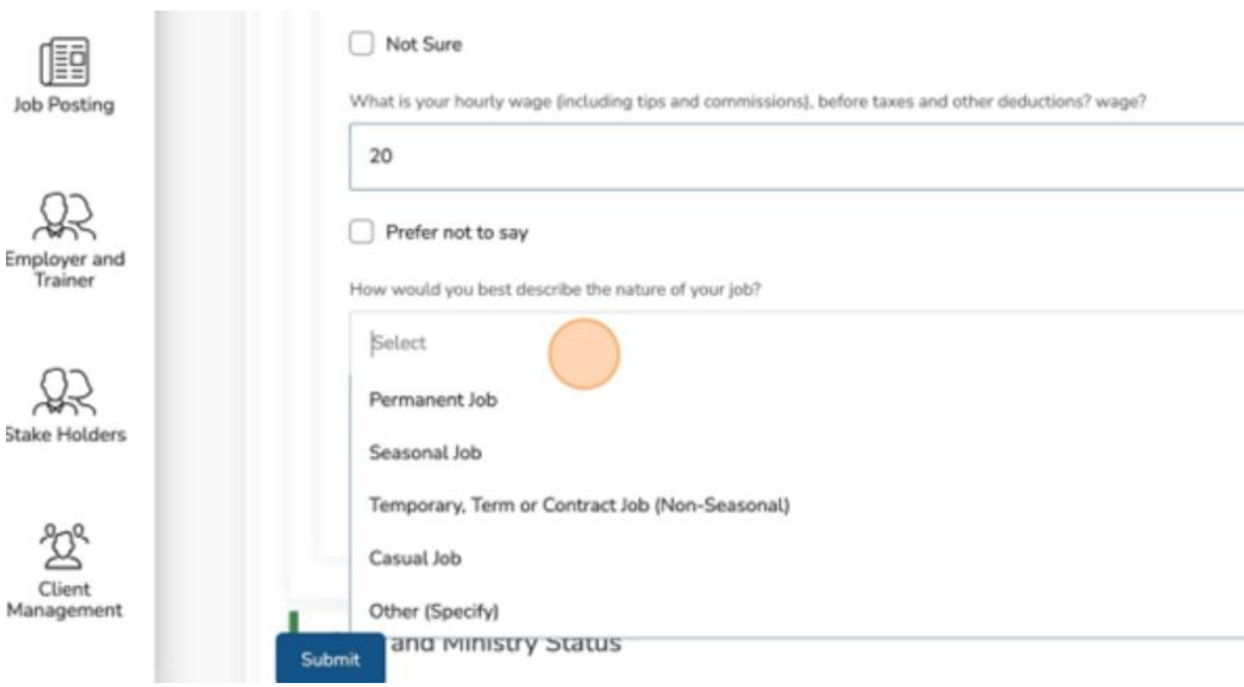
40. Input the appropriate answer.

41. Click the “What is your hourly wage (including tips...?” field.

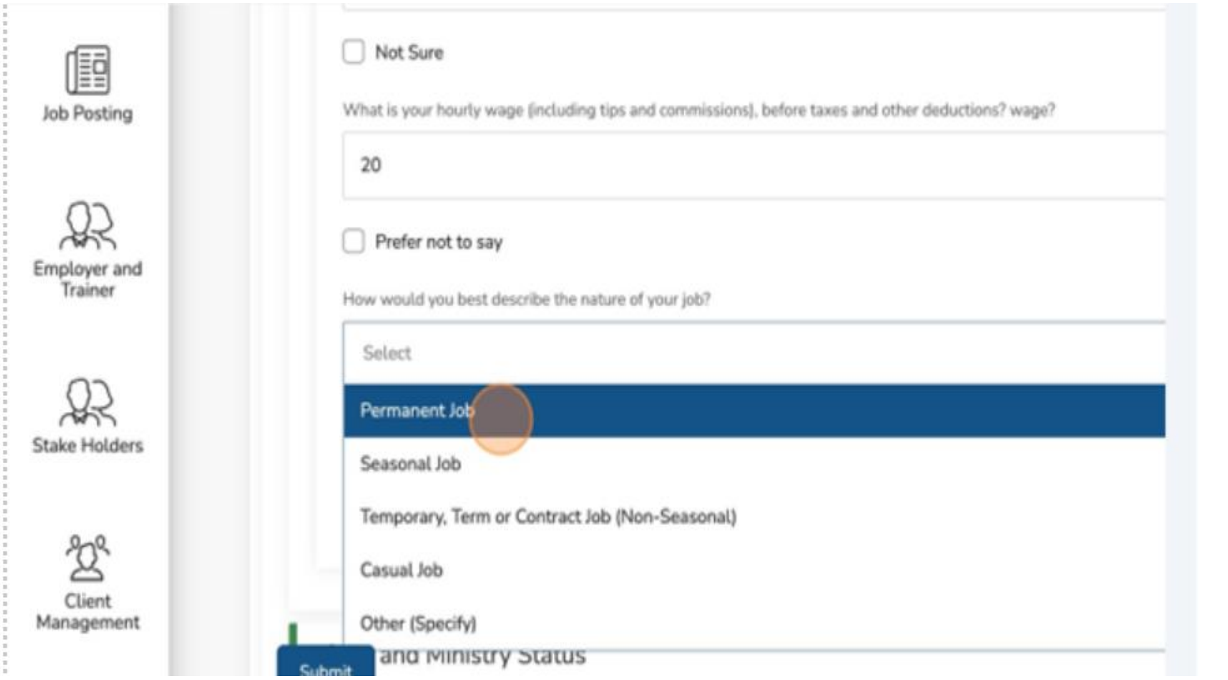


42. Input the appropriate answer.

43. Click the “How would you best describe the nature of your job?” field.

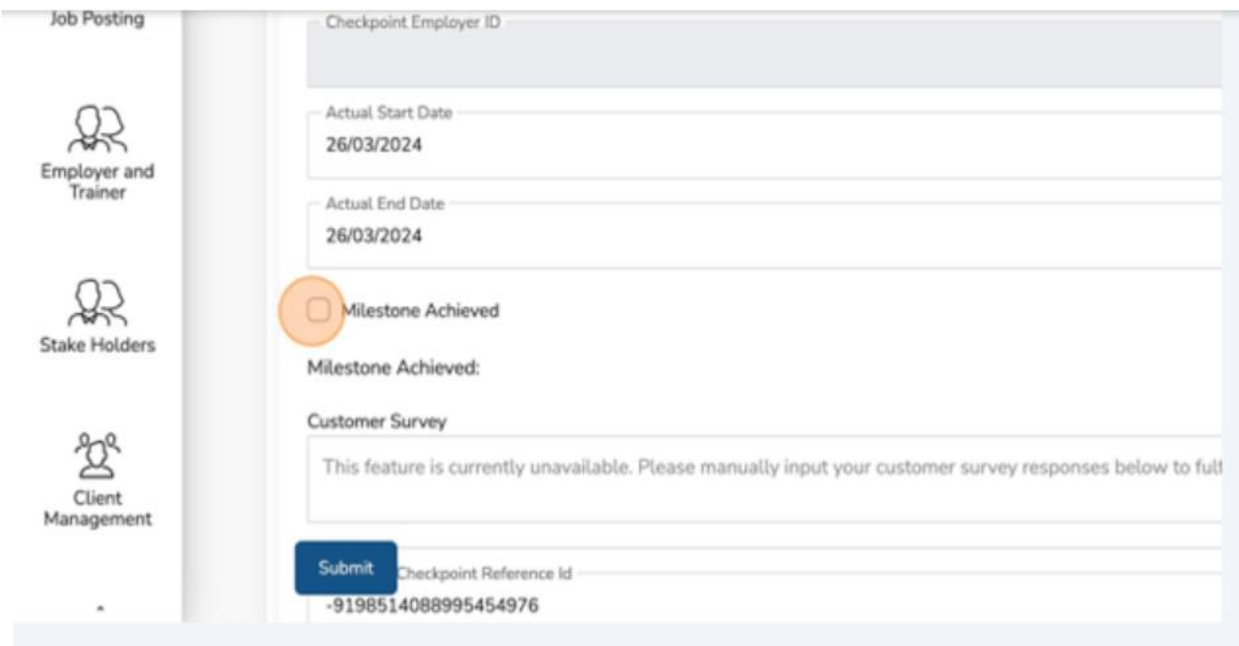


44. Select the appropriate answer.

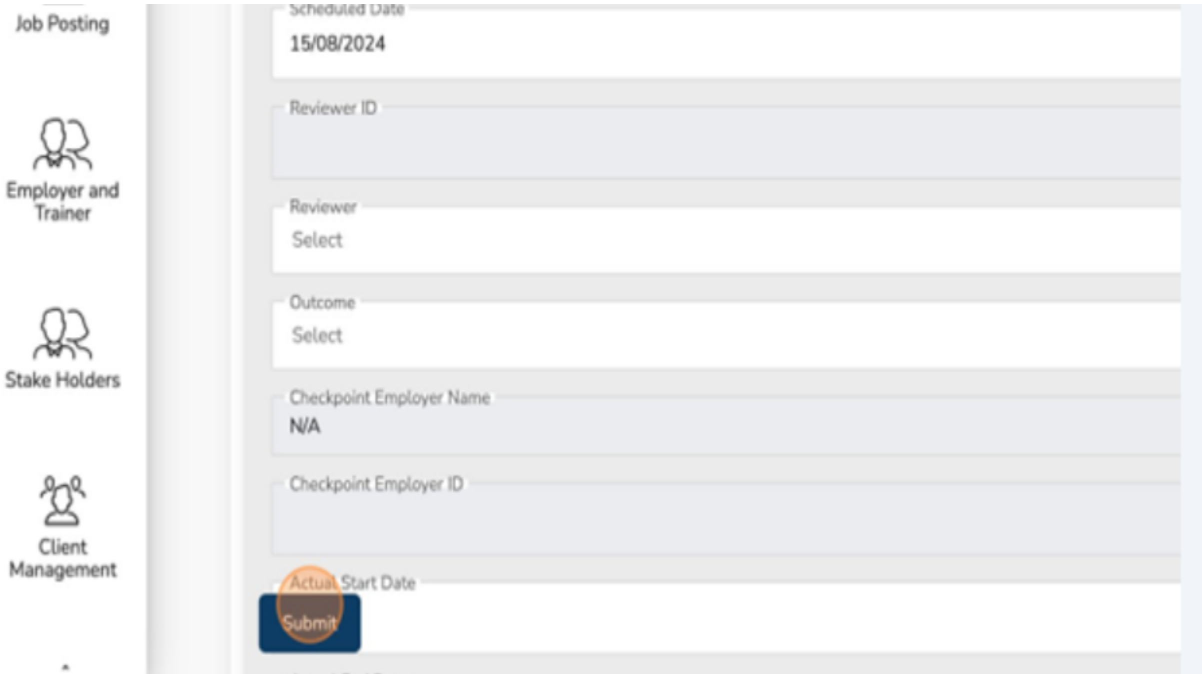


Return to the top of the questionnaire and locate the “Milestone Achieved” checkbox.

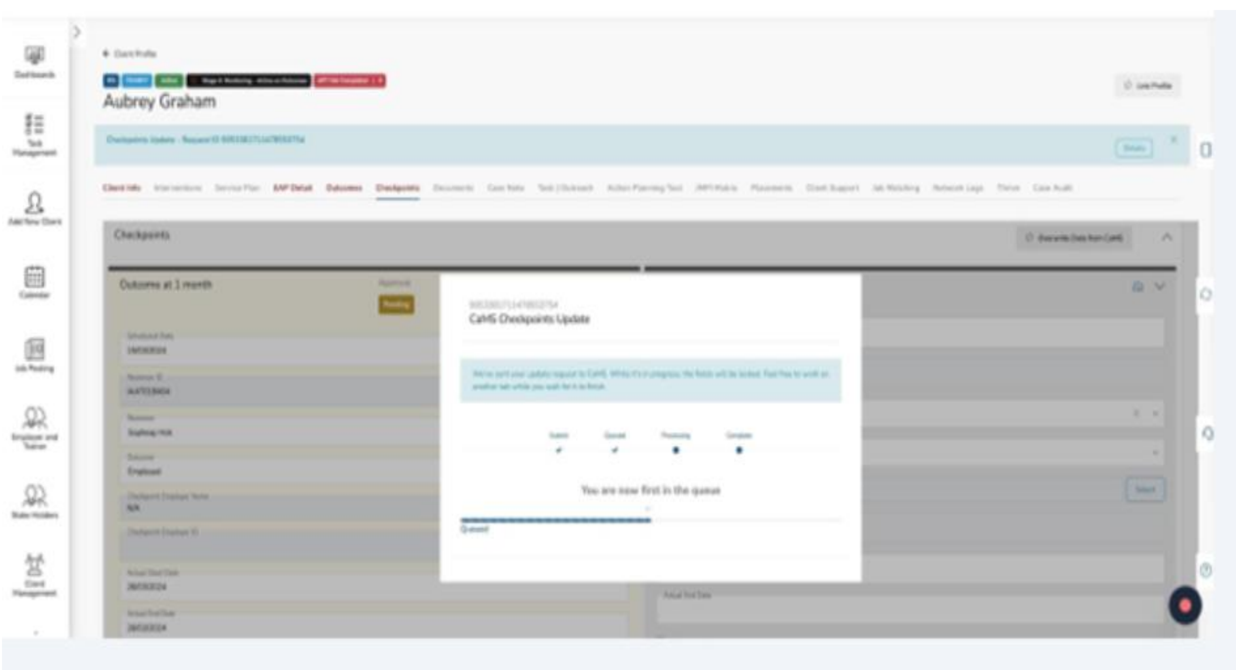
45. Check it.



46. Click “Submit.”

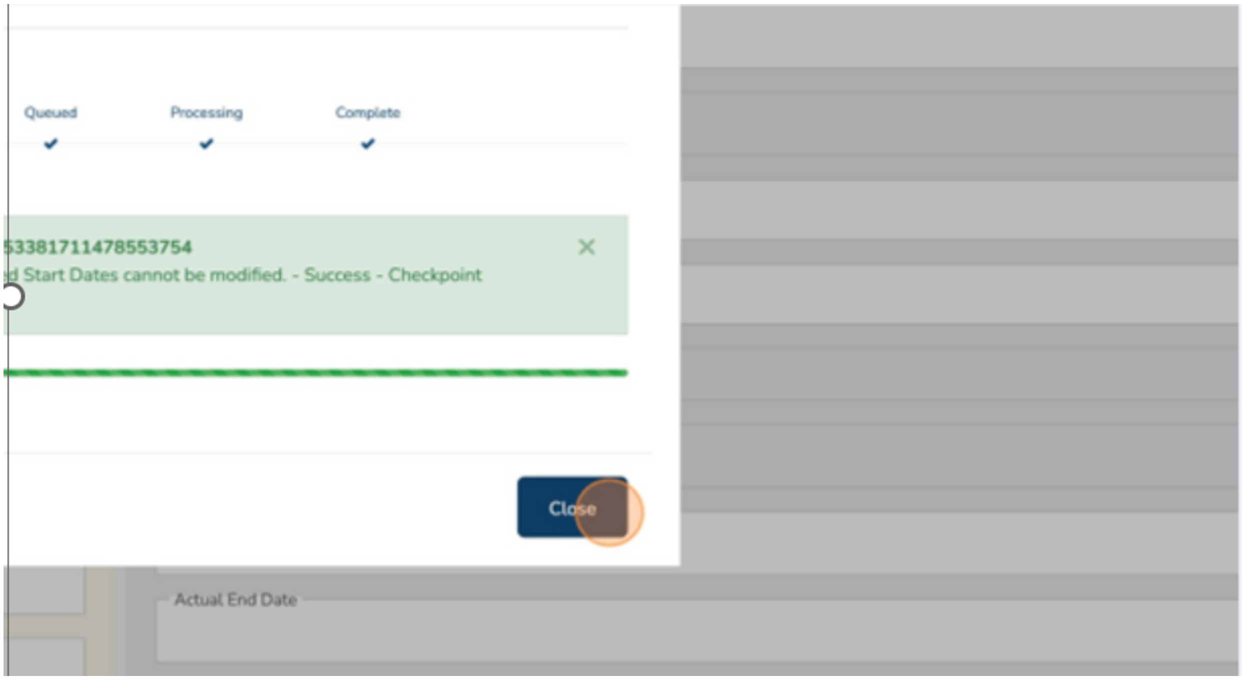


You will be placed in a queue while the checkpoint is being processed by CaMS.

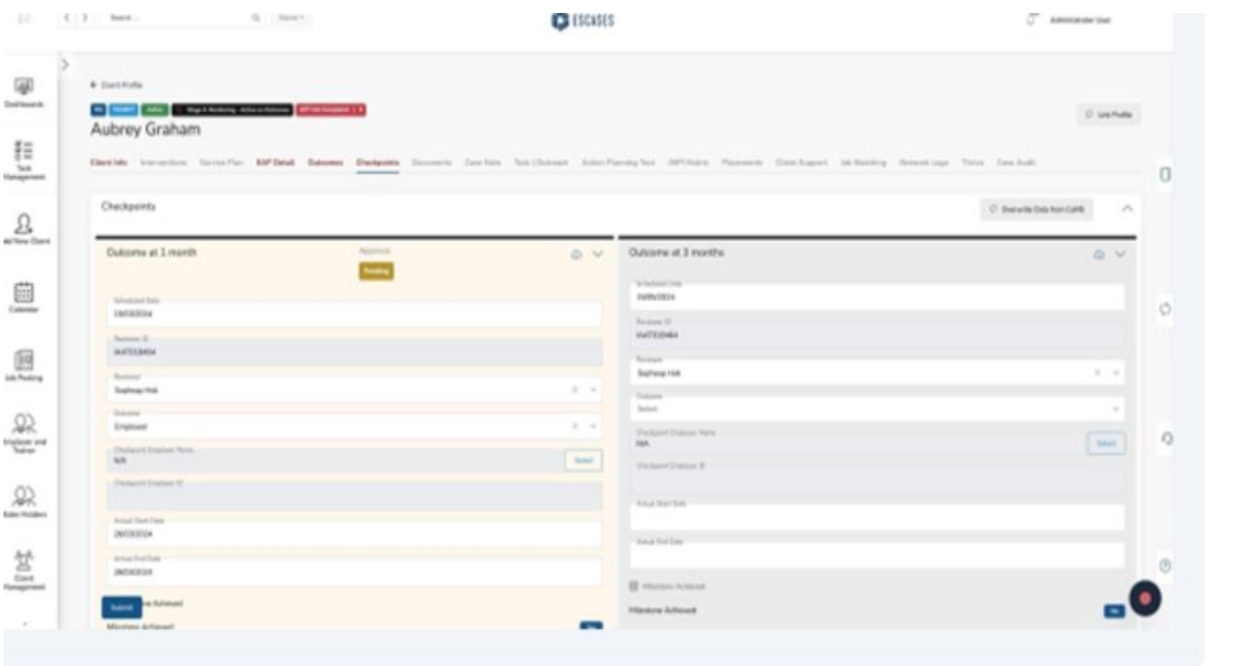


You will be provided with a success notification.

47. Click “Closed.”



You have successfully submitted your checkpoint.



(17) Client Supports

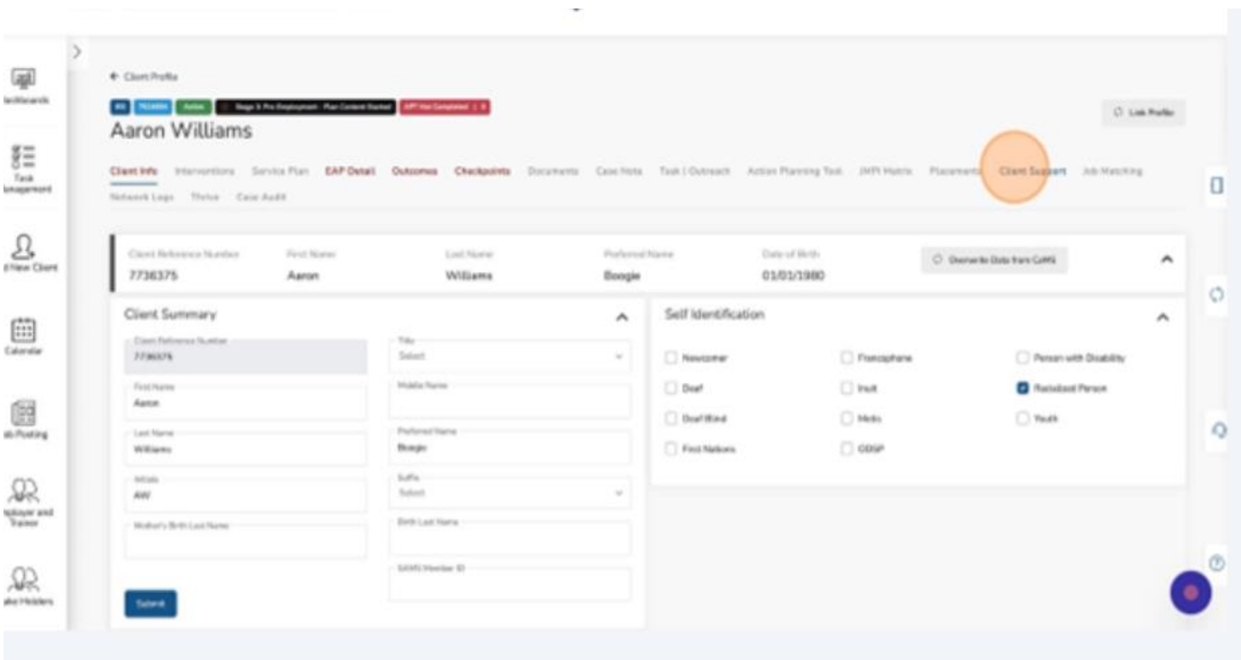
The Client Support workflow requires both submission of a request and approval.

Client Support Workflow – Submit a Request

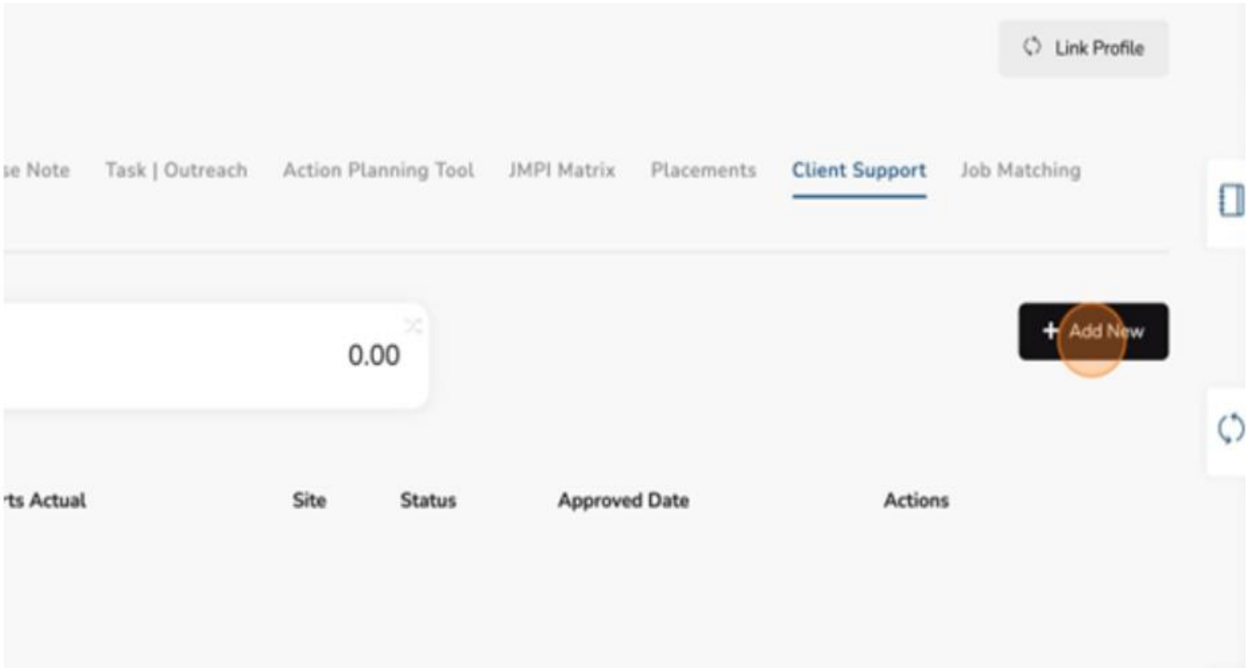
Please note: Information entered in this section will not be uploaded to CaMS. ESCases has the ability to track budgets and the actual or committed amounts attached to the budget.

To track a client support amount, complete the following steps:

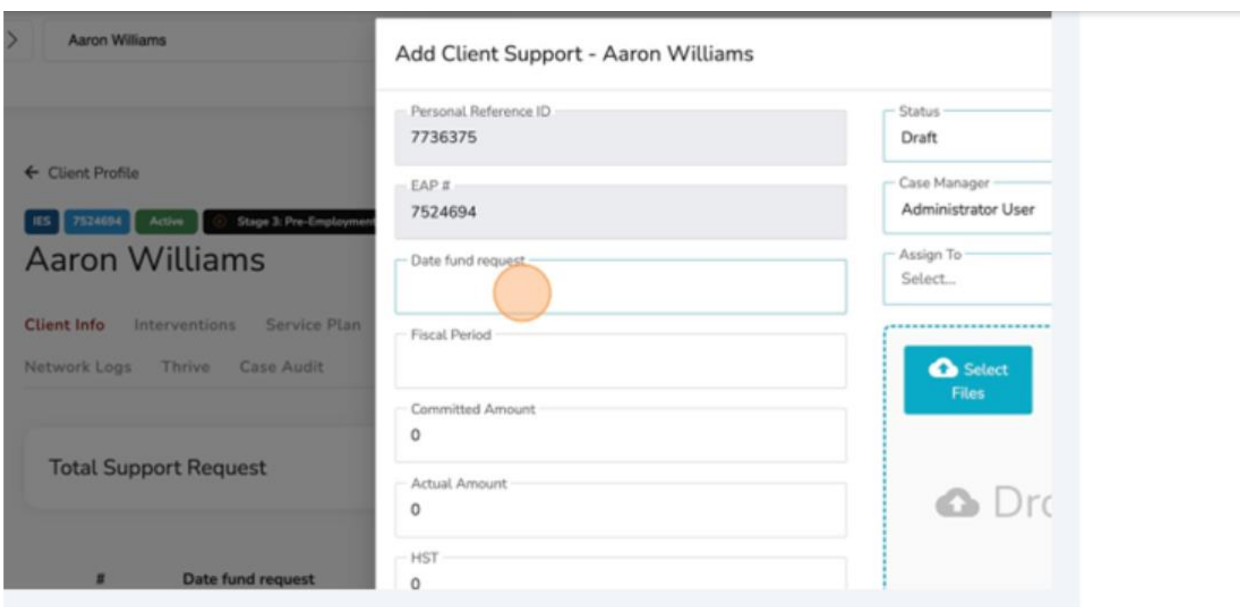
1. Navigate to the client profile and click “Client Support.”



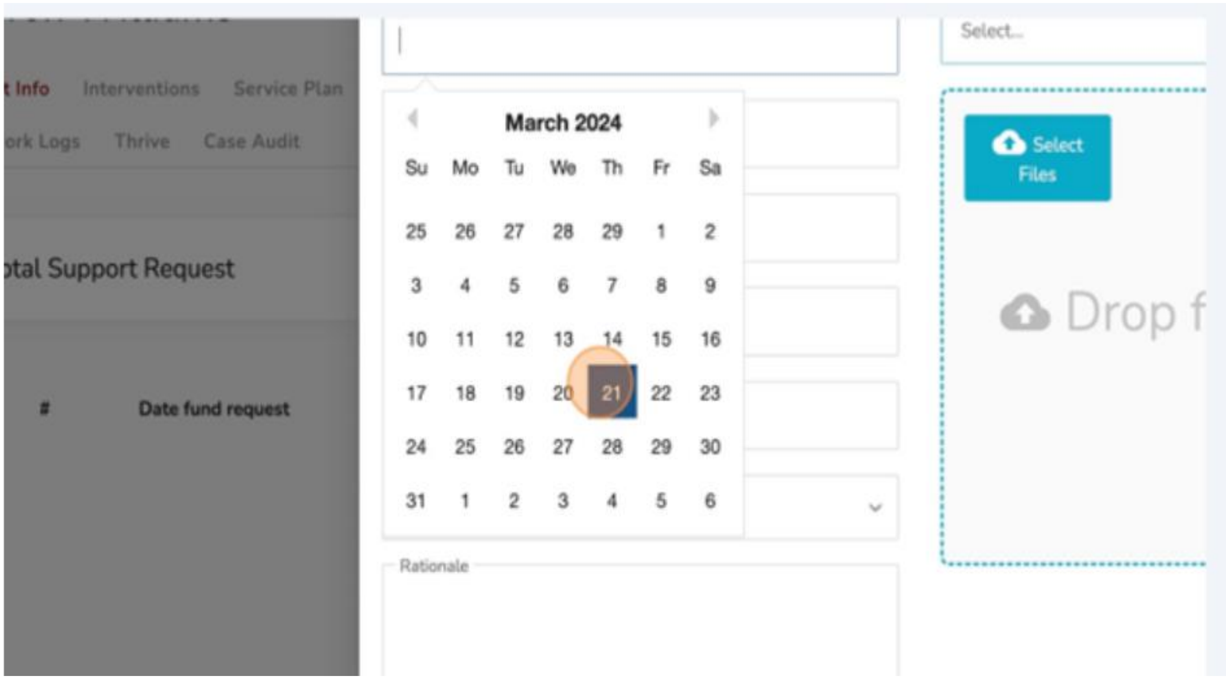
2. Click “Add New.”



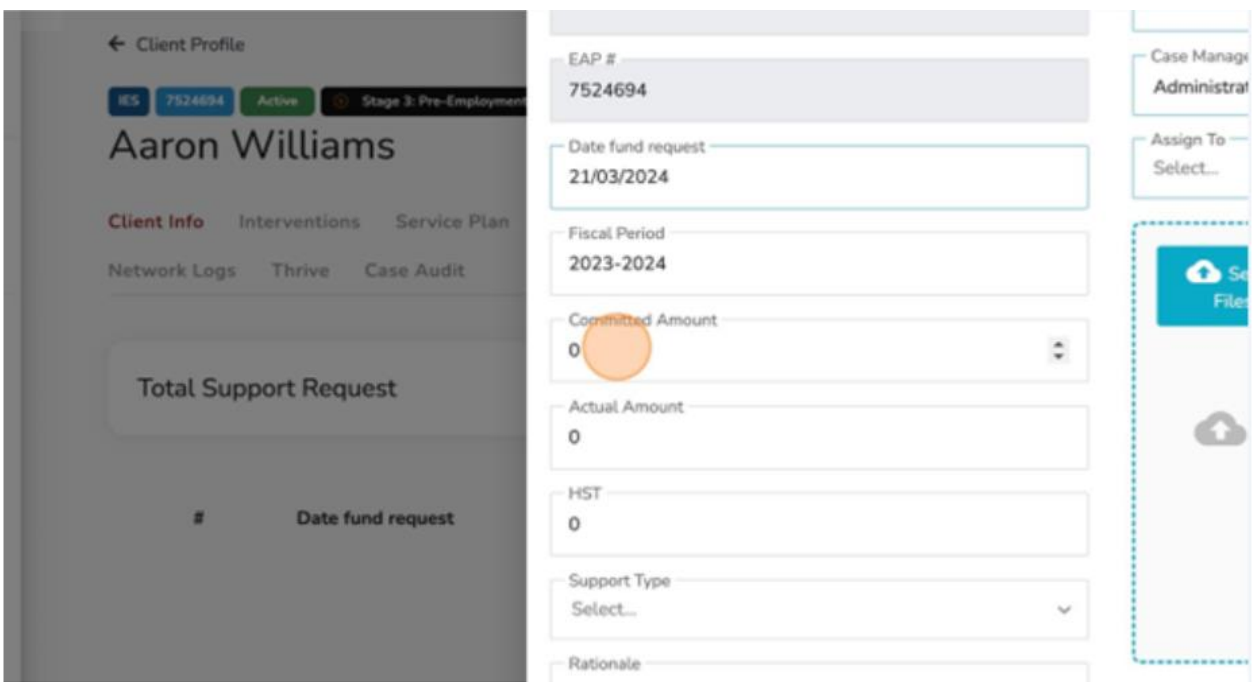
3. Click “Date Fund Request.”



4. Select the appropriate date.

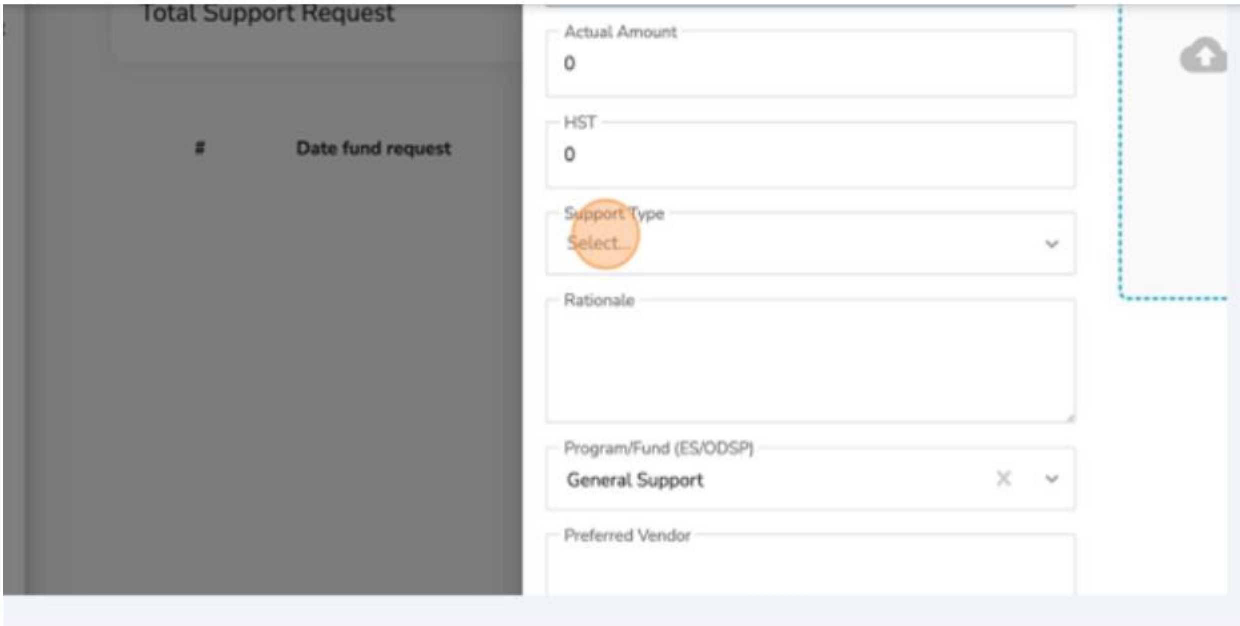


5. Click the “Committed Amount” field.

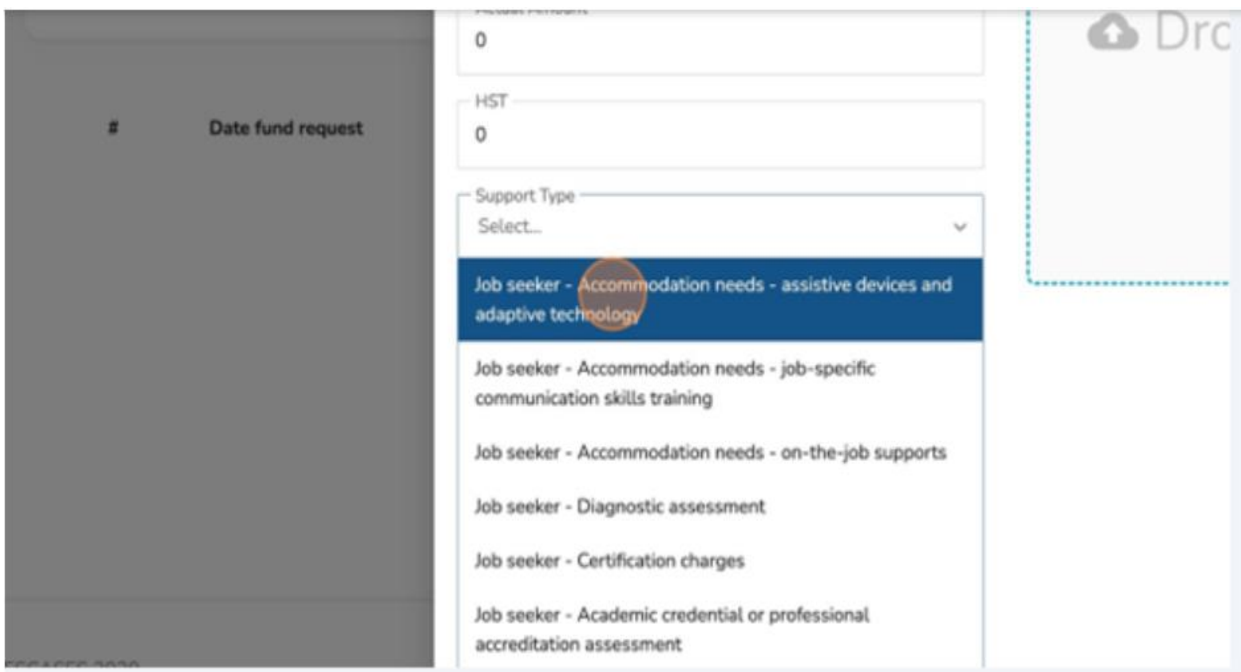


6. Insert the appropriate Committed Amount.

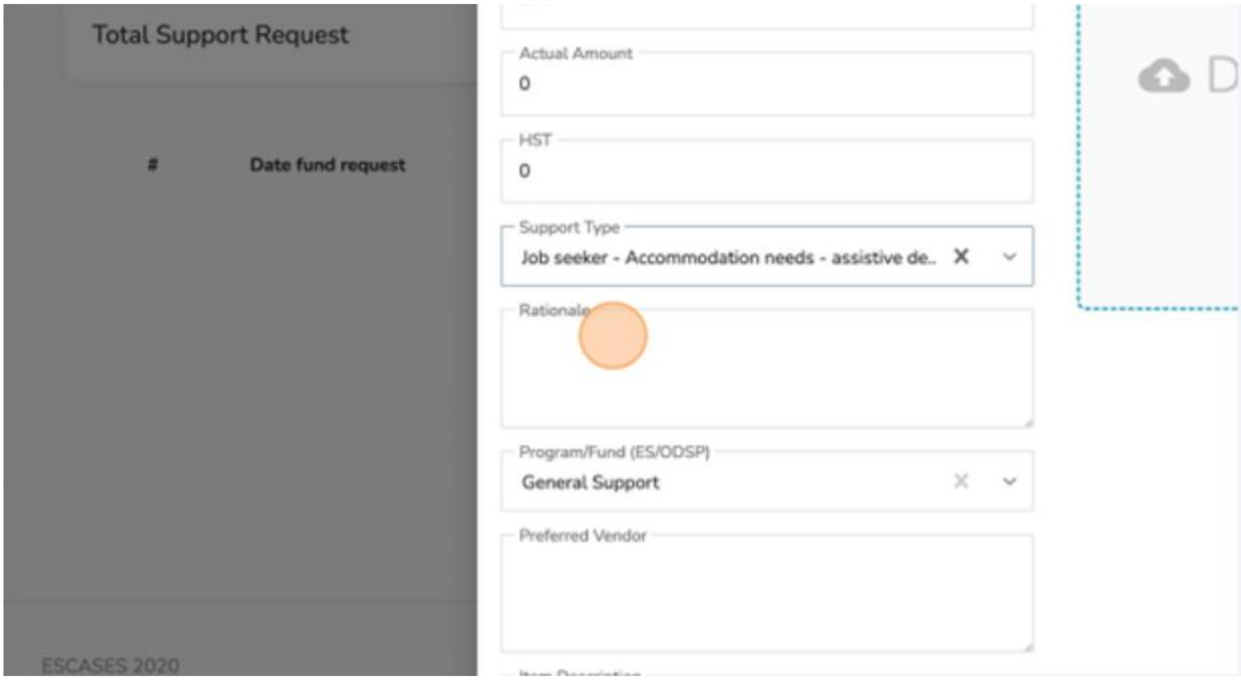
7.Click the “Support Type” field.



8. Select the appropriate “Support Type.”



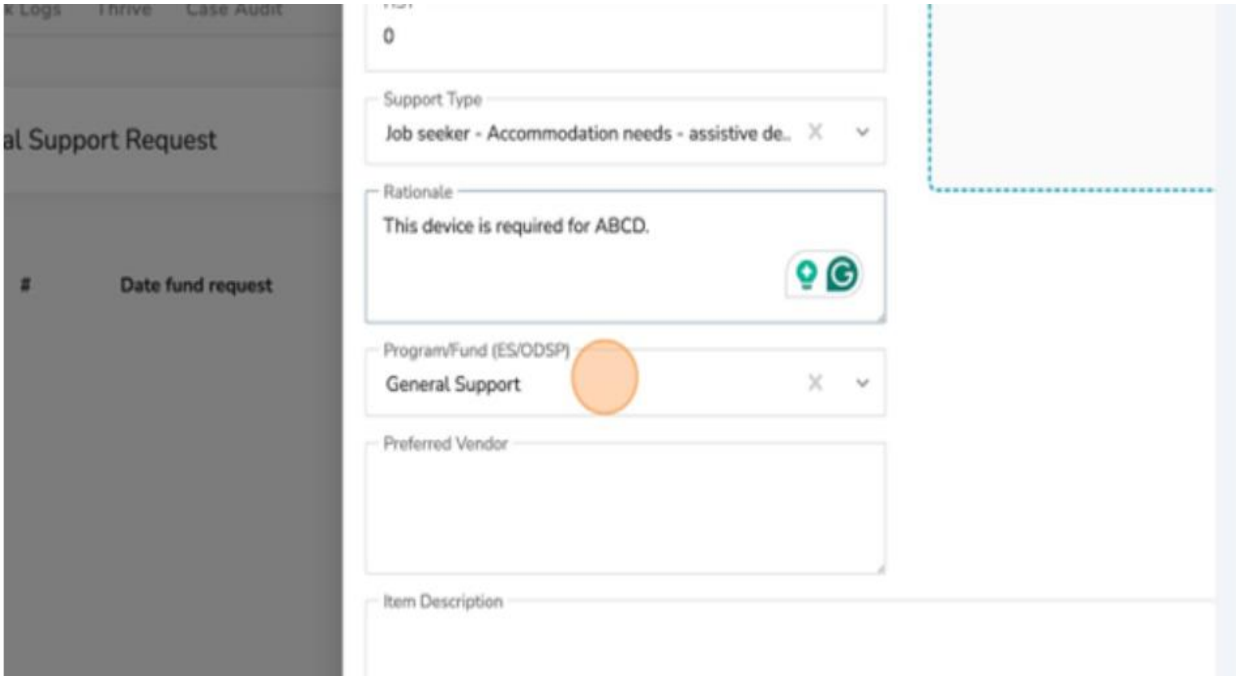
9. Click the “Rationale” field.



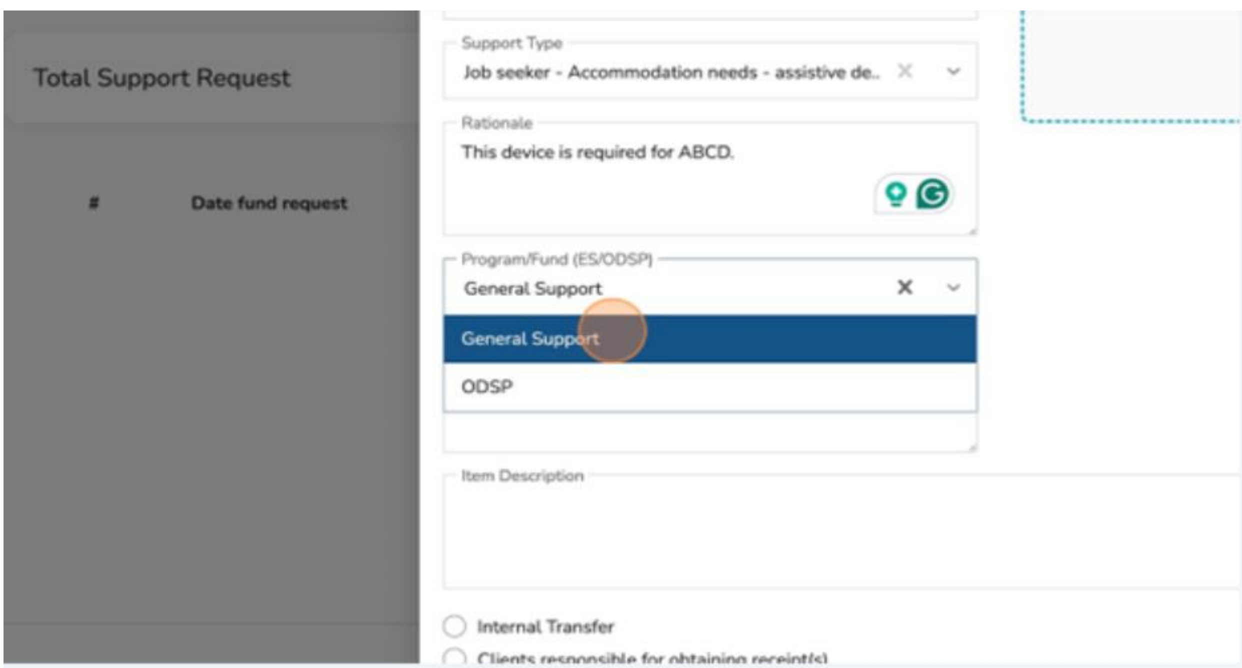
11. Insert the appropriate Rationale.

✓ Note: Please include a detailed rationale of why the support removes a temporary barrier for the client and aligns with the client's EAP and/or employment goal.

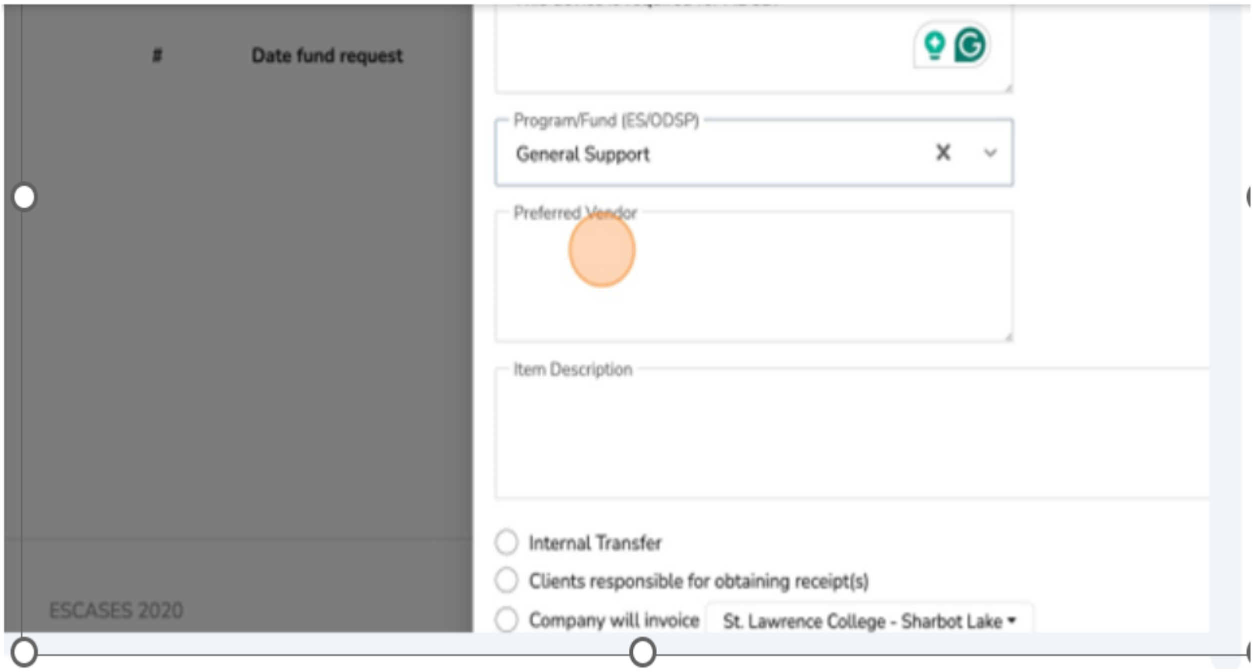
12. Click the “Program Fund” field.



13. Select the appropriate Fund.

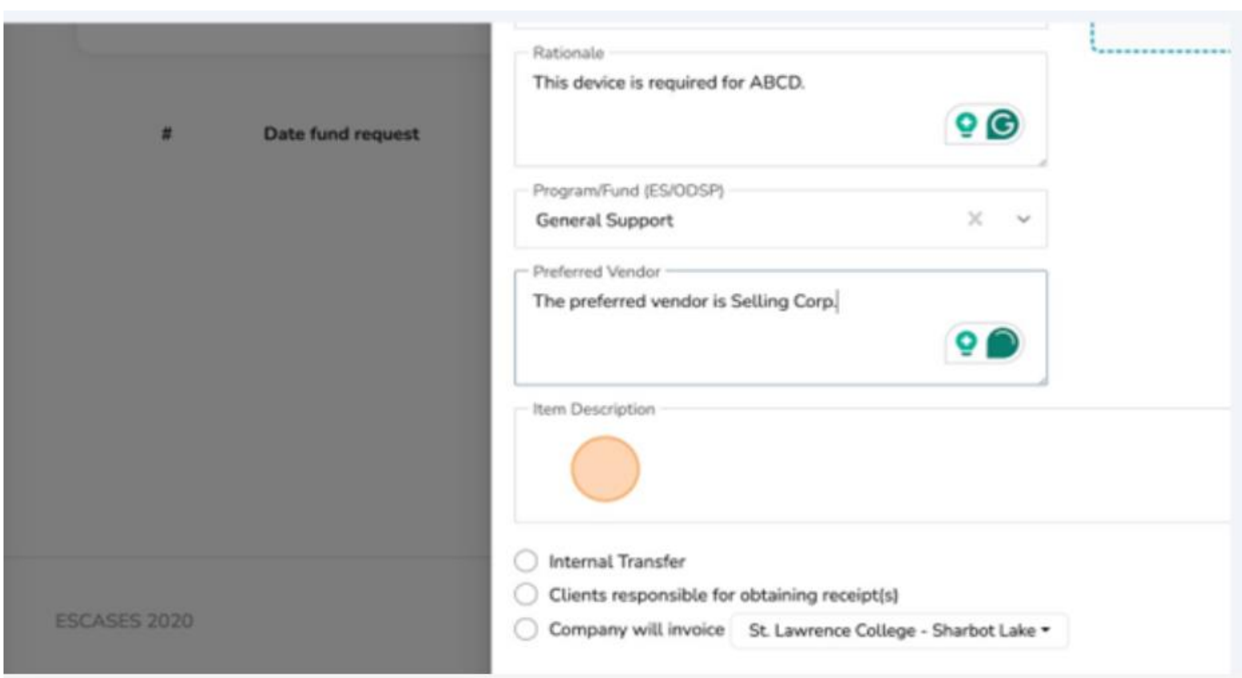


14. Click the “Preferred Vendor” field.



15. Insert the “Preferred Vendor” as required.

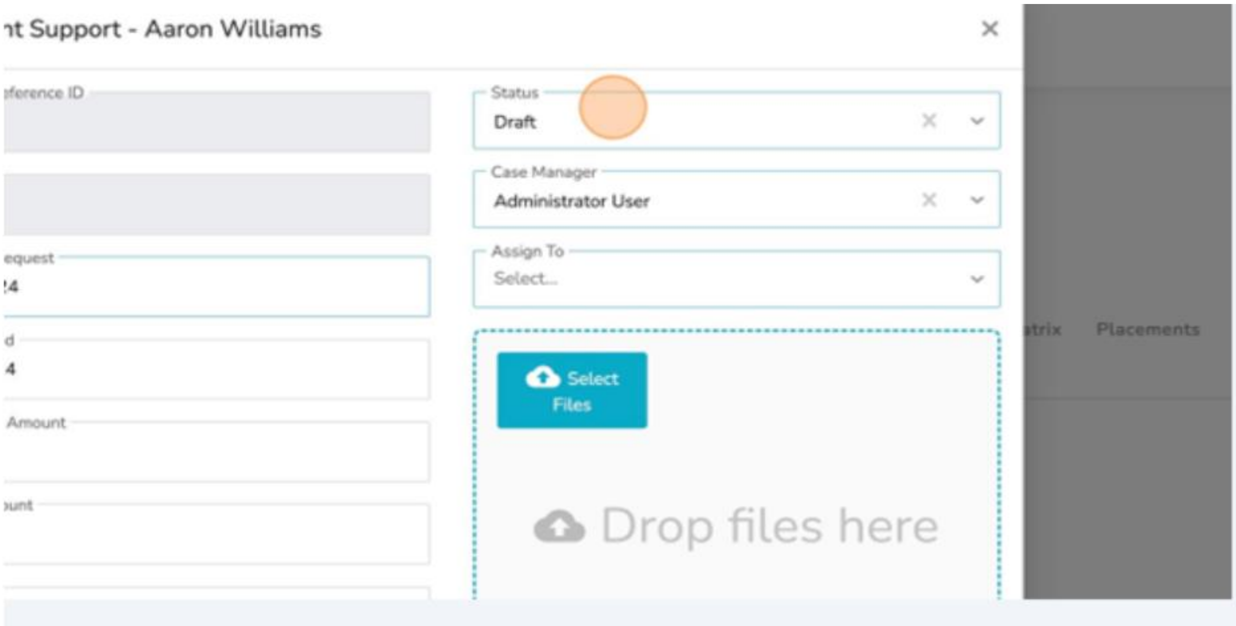
16. Click the “Item Description” field.



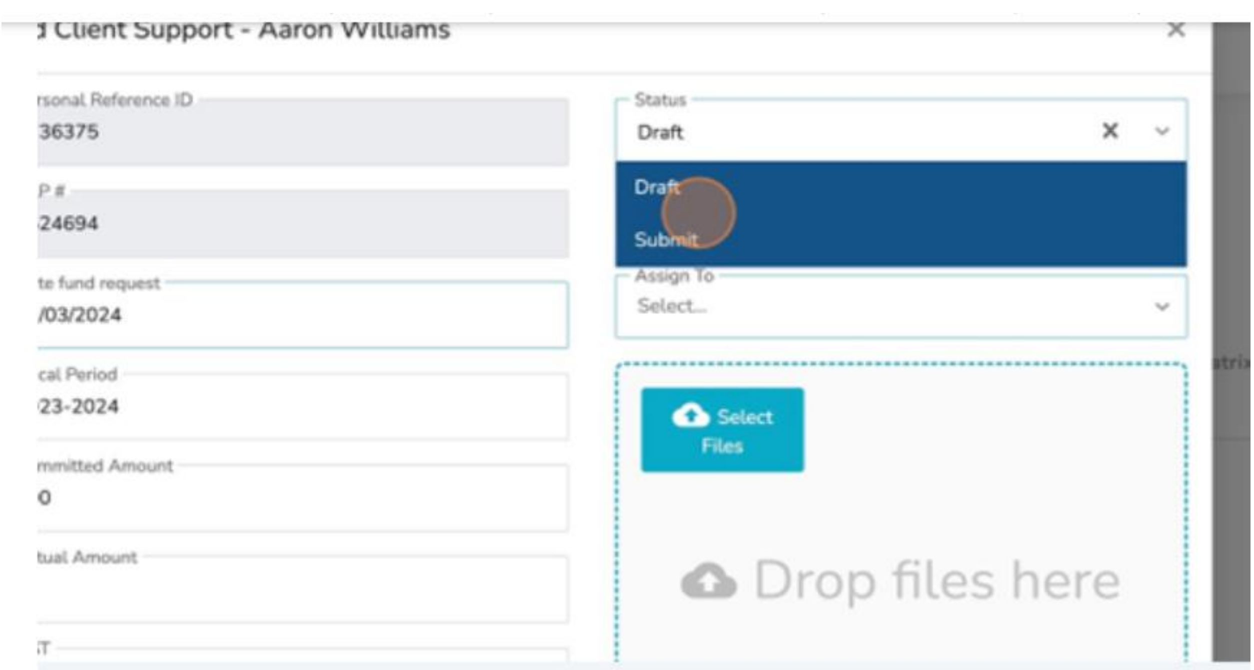
❖ The description as a 500-character limit as set by the Ministry.

17. Insert the appropriate “Item Description.”

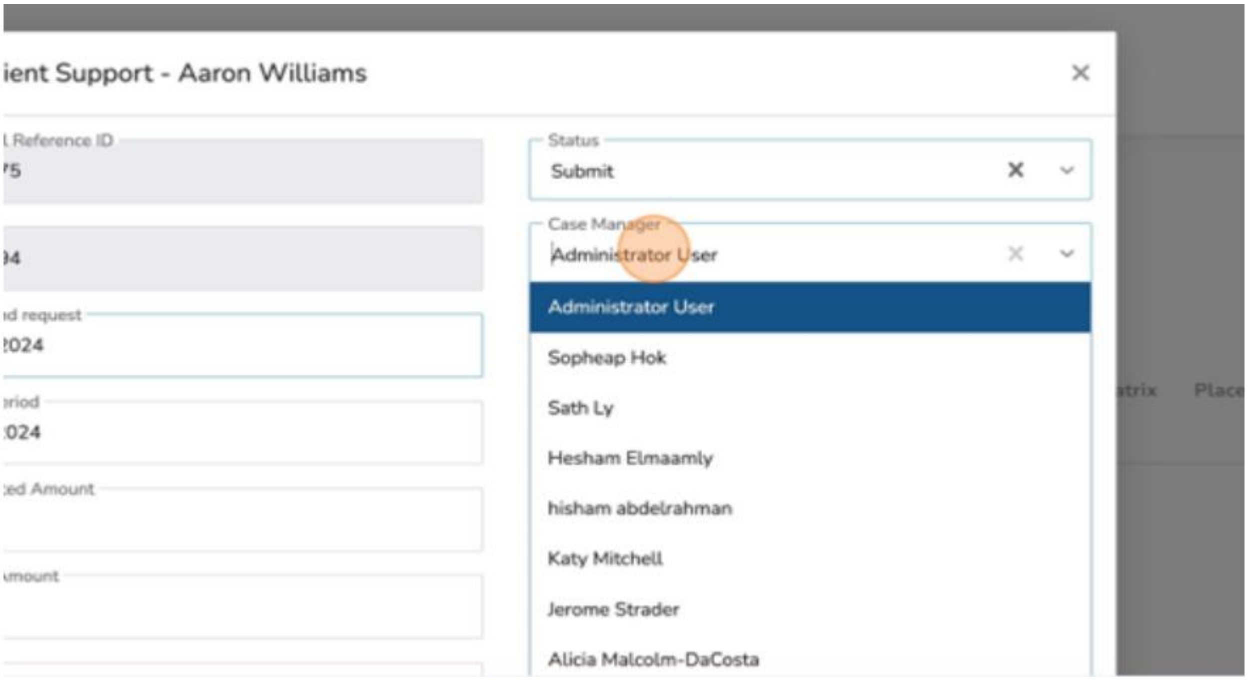
18. Click the “Status” field.



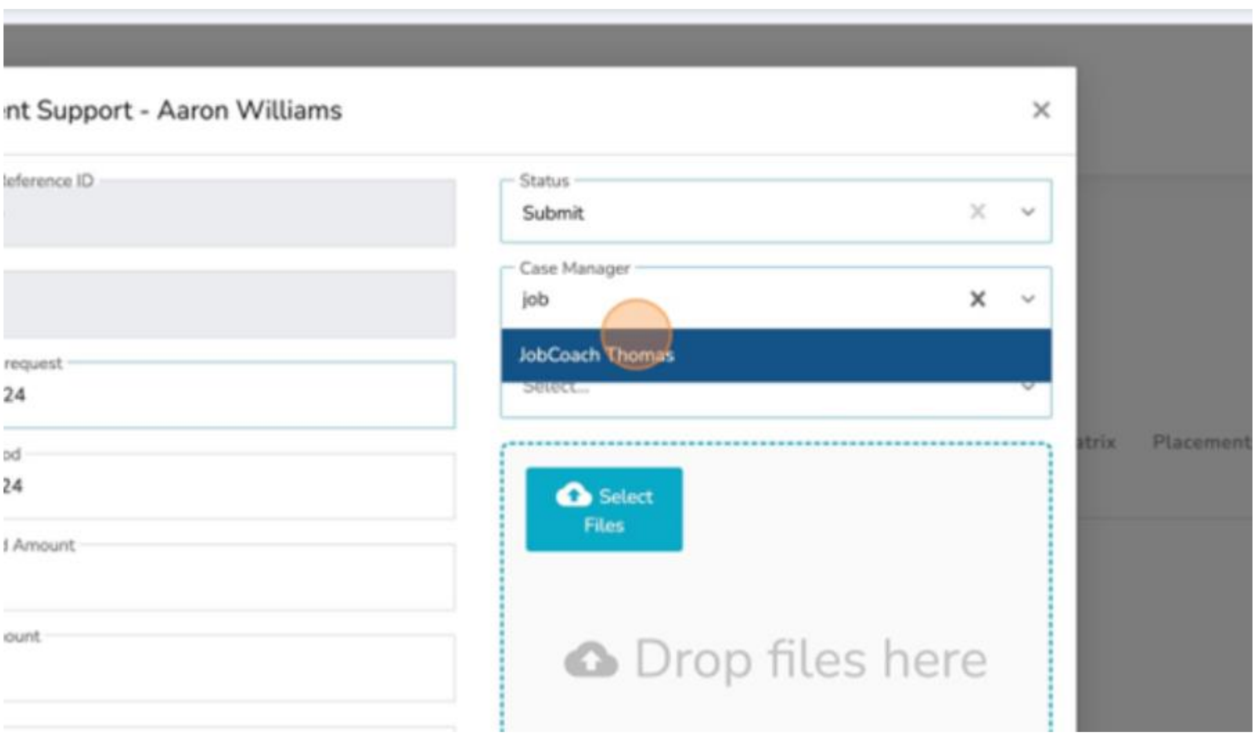
19. Select “Submit.”



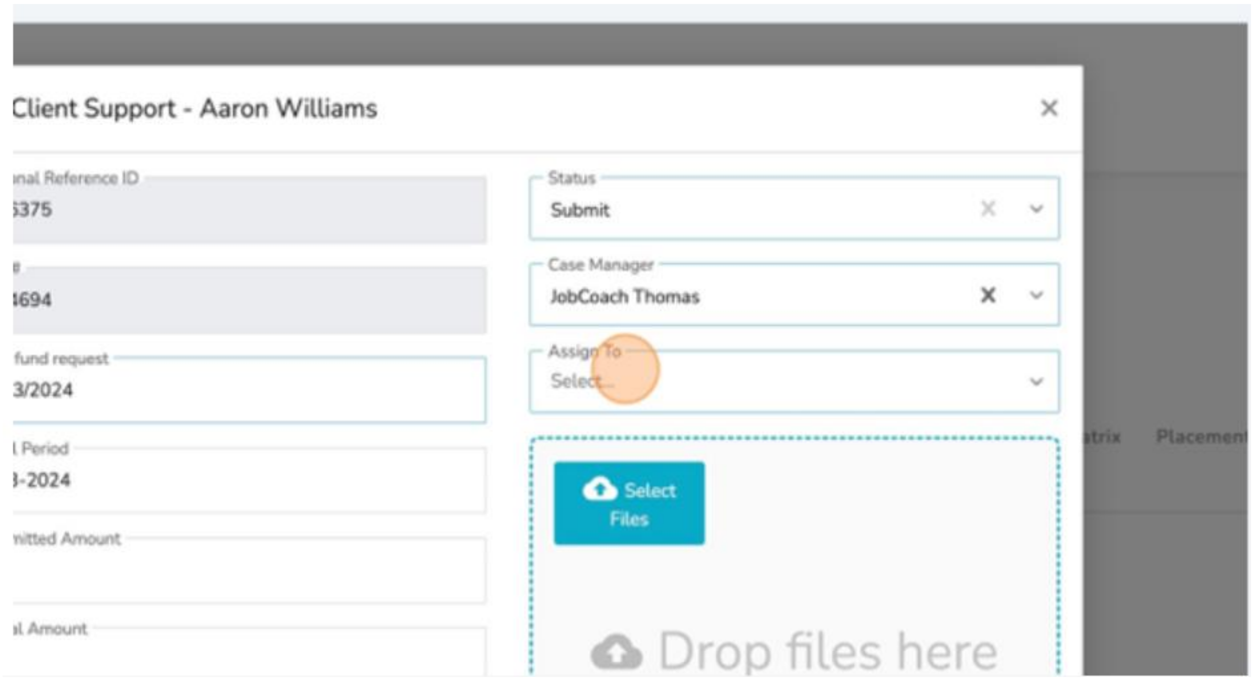
20. Click the “Case Manager” field.



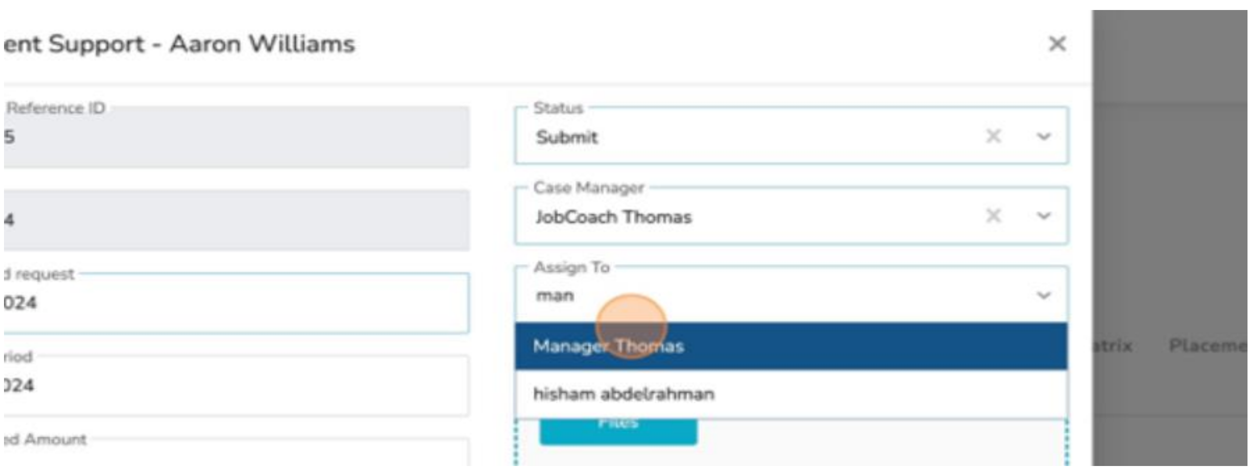
21. Select the appropriate “Case Manager.”



22. Click the “Assign to” field.

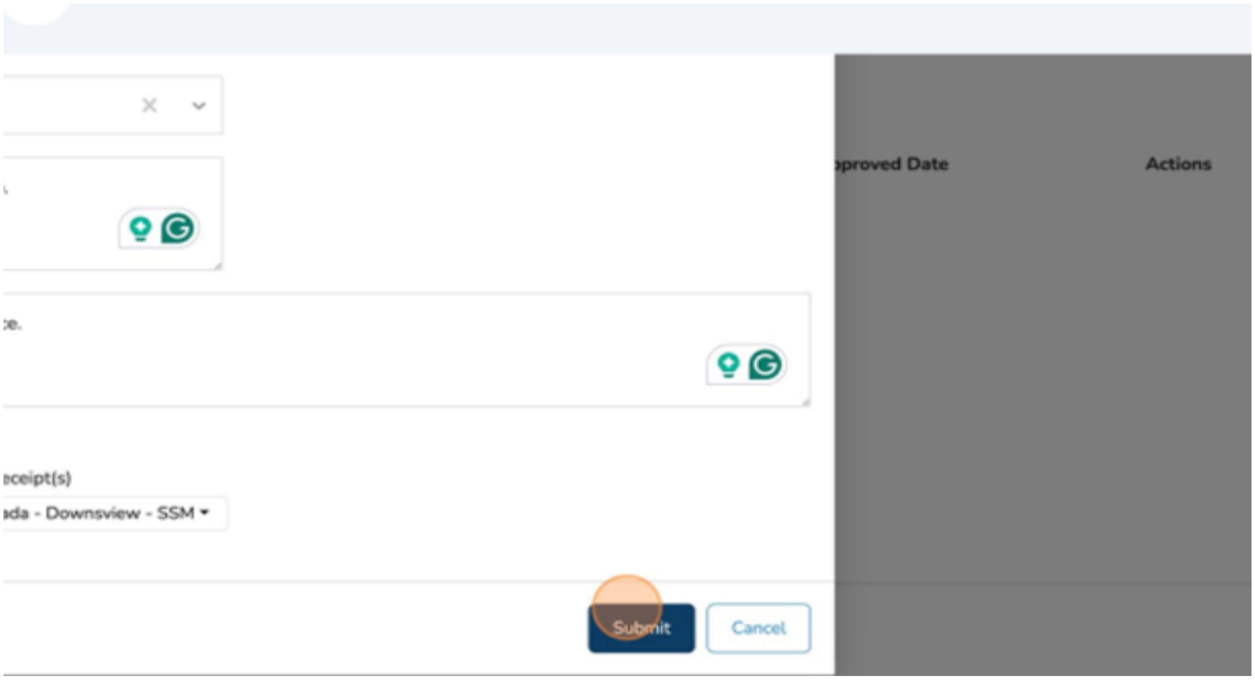


23. Select the appropriate Manager that is to approve this client support.

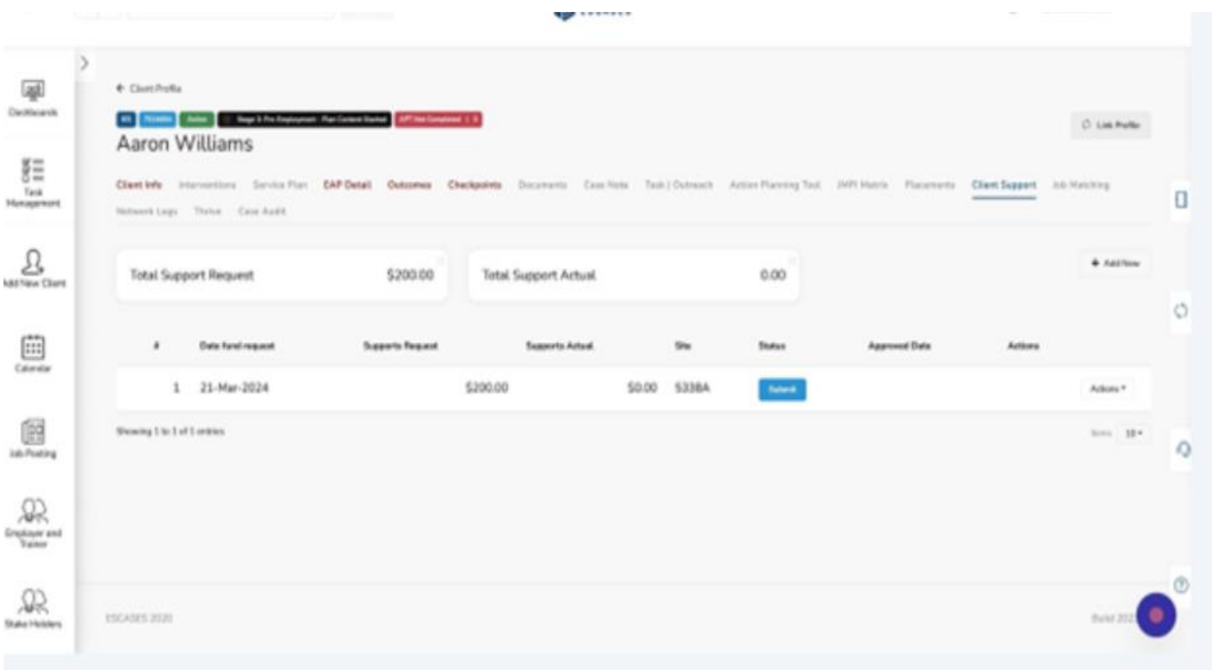


- ✓ If you don't see the person that's supposed to approve this request on the "Assign To" list, please see the "Client Fund Setting" in the admin section of the training guide.
- ✓ Note: The “Client Fund Setting” can be update by the staff in your organization that has the authority to complete this section based on assigned staff roles in ESCases.

24. Click “Submit.”



Client Support has been successfully submitted.



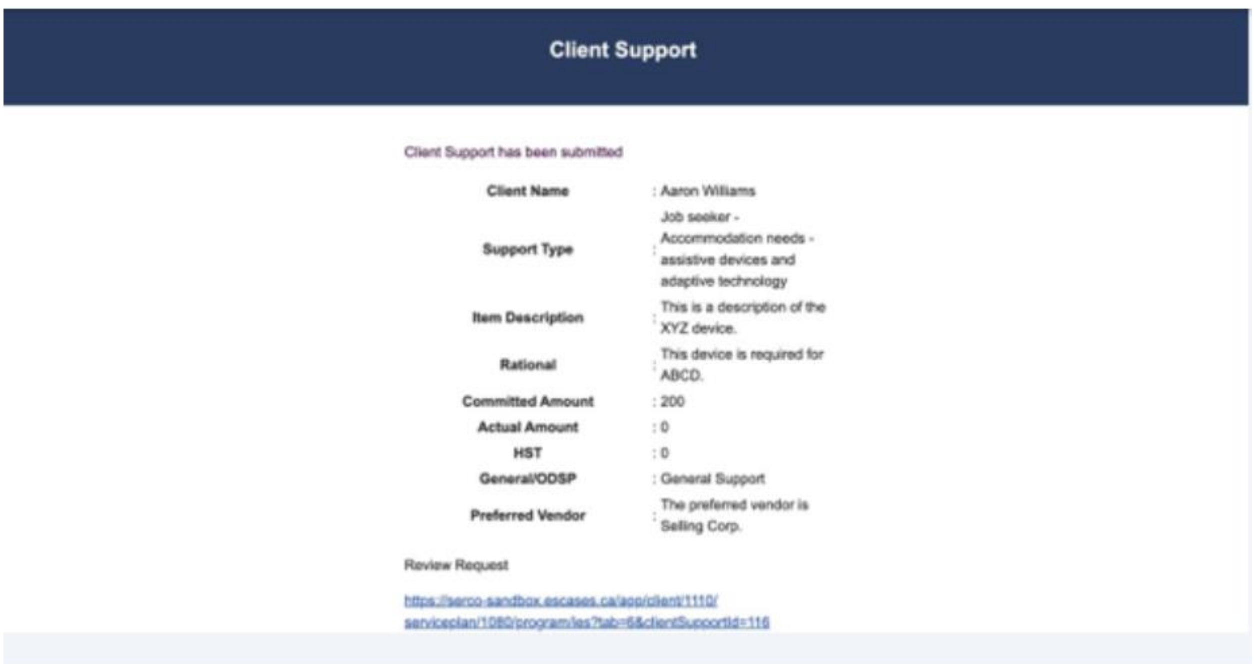
- ✓ Note: If client signature is required:
  - Go to list. On Actions
  - select Payment Record. Print the record and have client sign.
  - The signed copy can be scanned and uploaded in documents.

Client Support Workflow – Approve Request

- ❖ Tip! When a client support request is made by the submitter, an email is sent to the approver.

The approver will receive an email.

1. The approver will click the link to access the client support.



Client Support

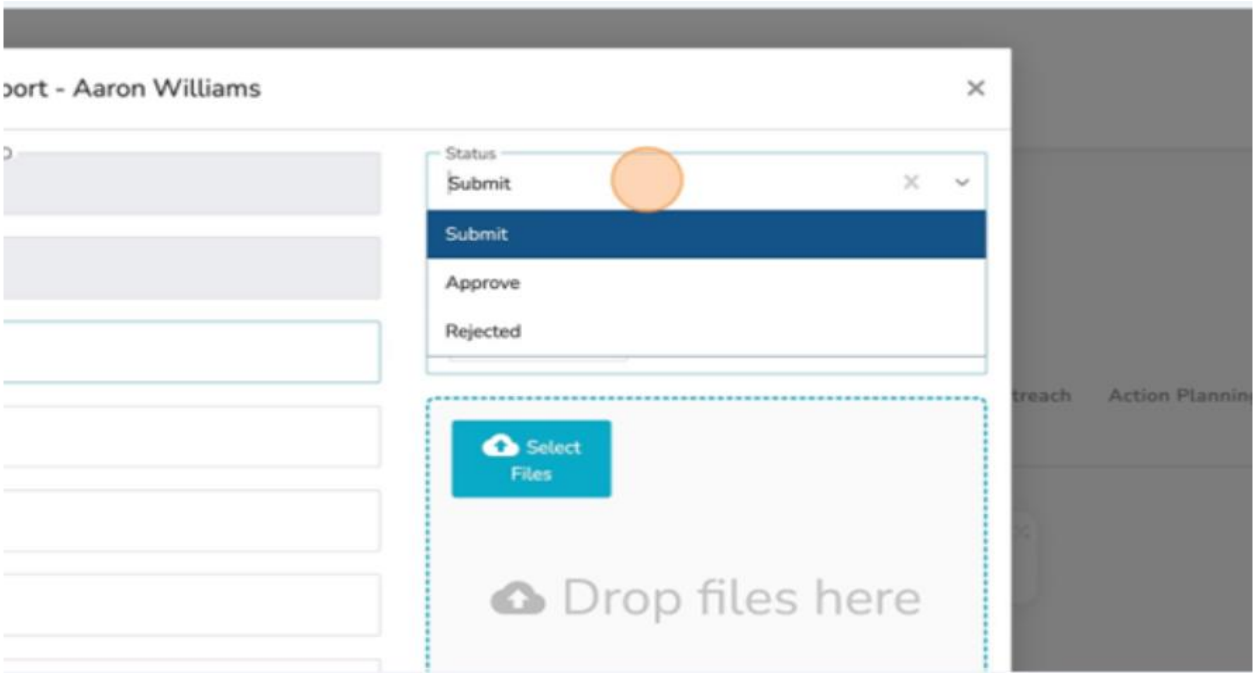
Client Support has been submitted

Client Name	: Aaron Williams
Support Type	: Job seeker - Accommodation needs - assistive devices and adaptive technology
Item Description	: This is a description of the XYZ device.
Rational	: This device is required for ABCD.
Committed Amount	: 200
Actual Amount	: 0
HST	: 0
General/ODSP	: General Support
Preferred Vendor	: The preferred vendor is Selling Corp.

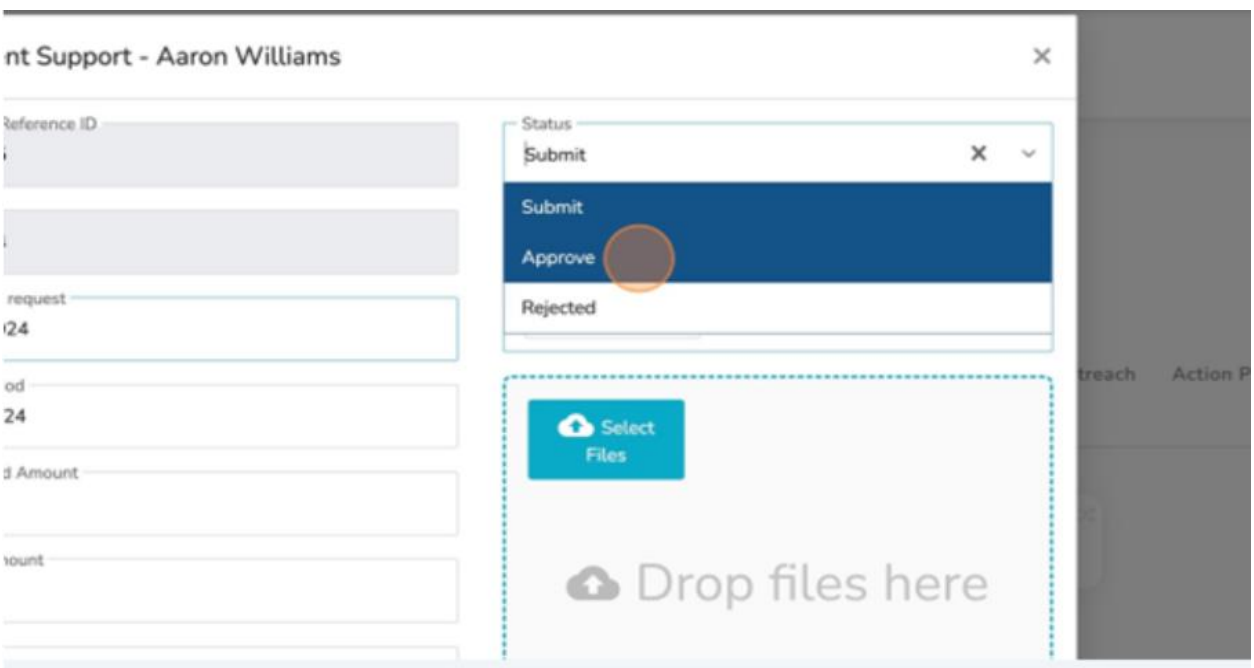
Review Request

https://serco-sandbox.escases.ca/app/client/1110/serviceplan/1080/program/es?tab=6&clientSupportId=116

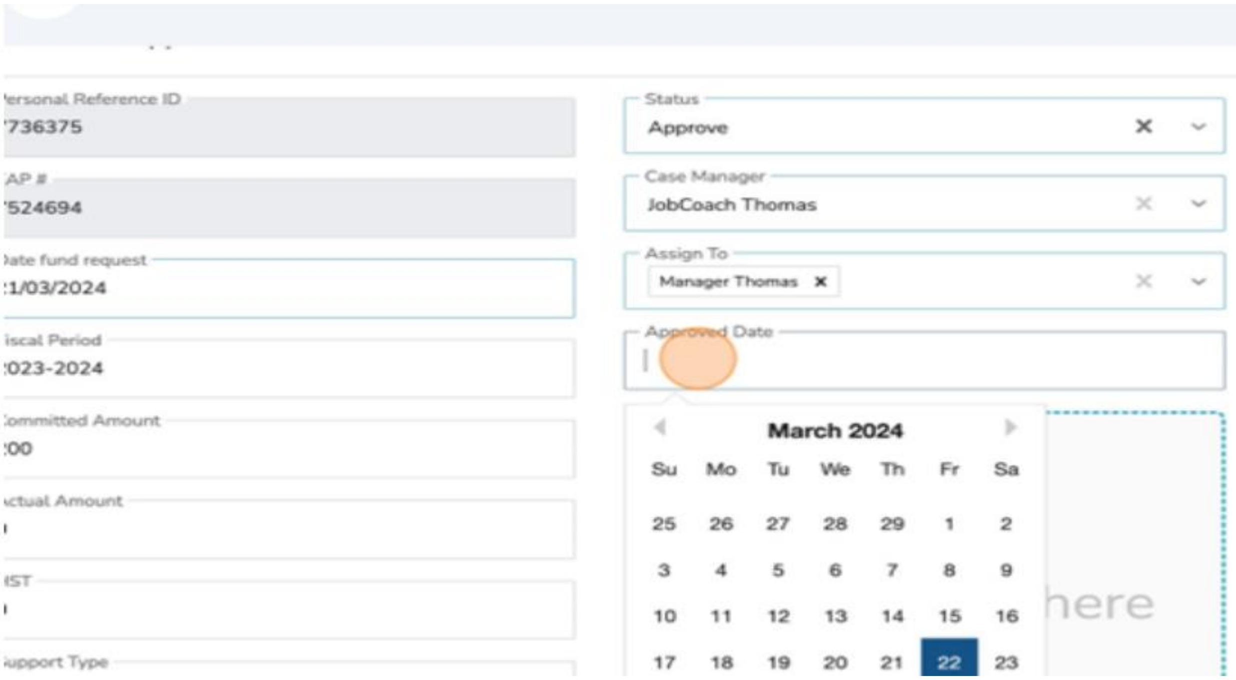
2. Select the “Status” field.



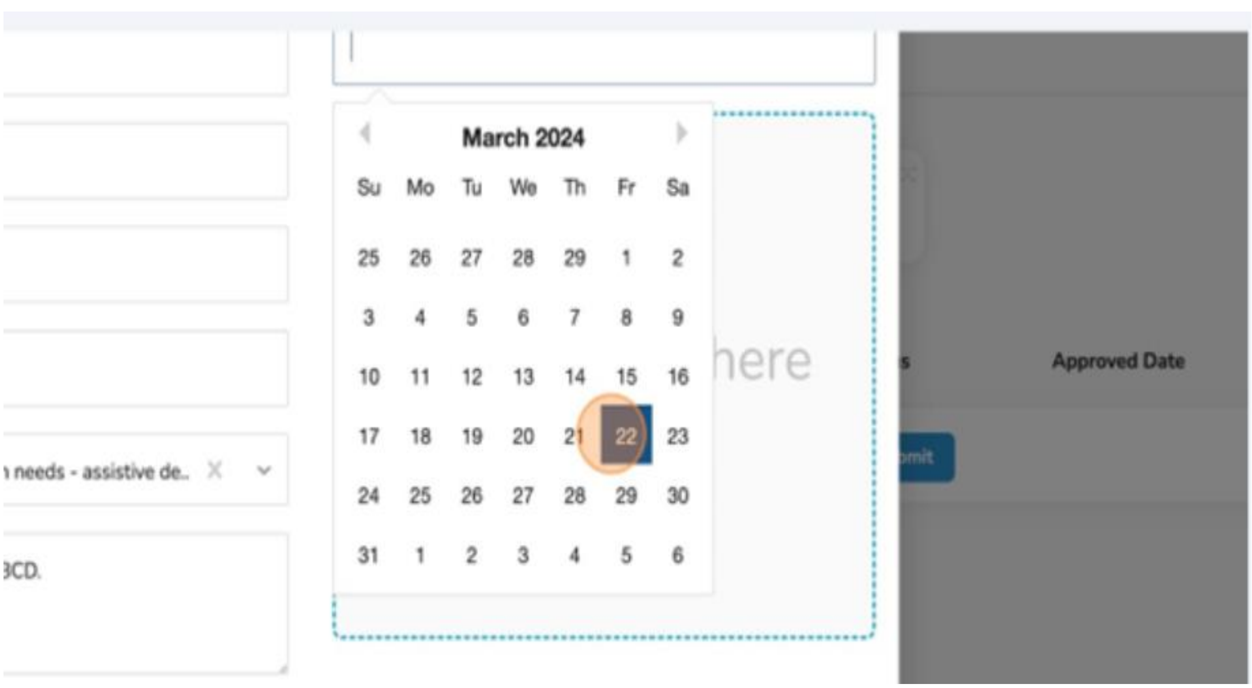
3. Click “Approve.”



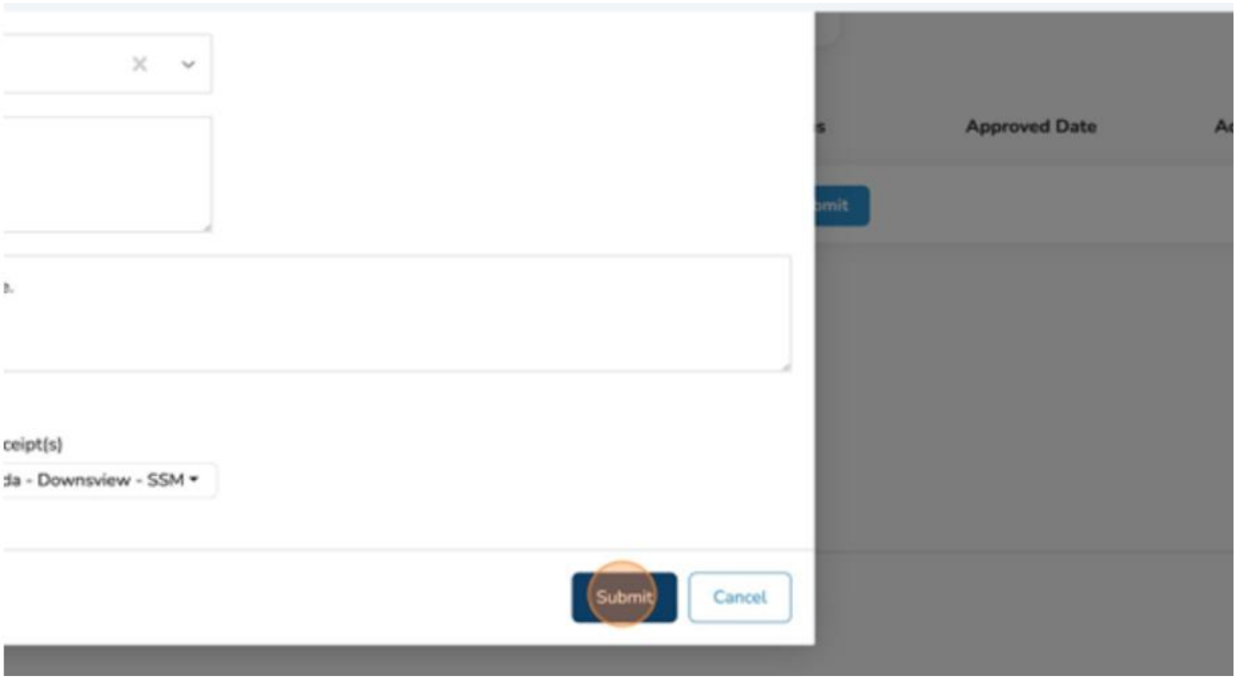
4. Click the “Approve Date” field.



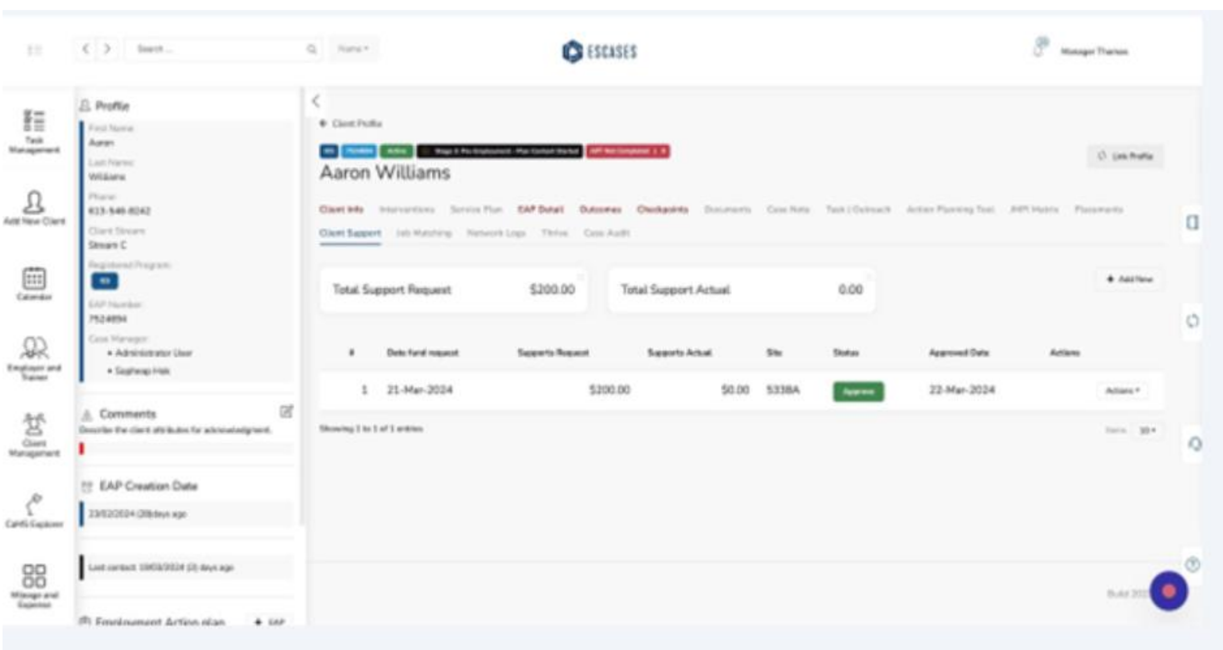
5. Select the appropriate date.



6. Click “Submit.”



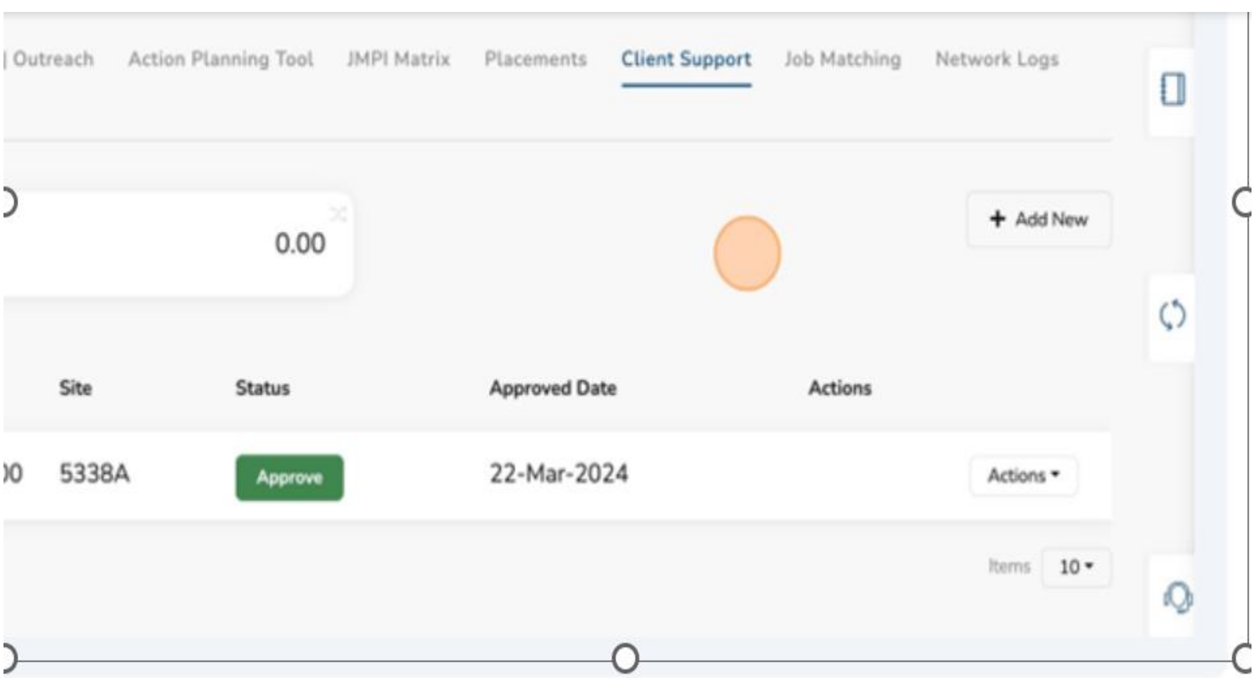
The “Client Support” has been approved.



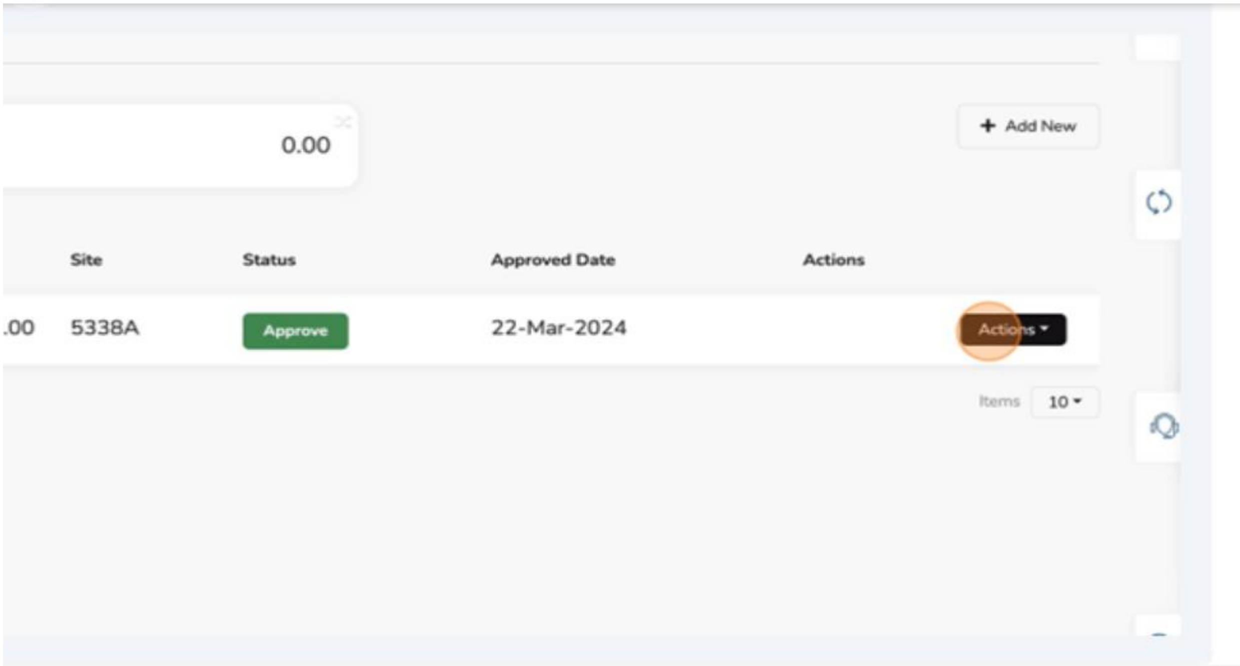
✓ The submitted and the approver will receive a notification through email when the status of the “Client Support” has changed.

Completing an Approved Client Support

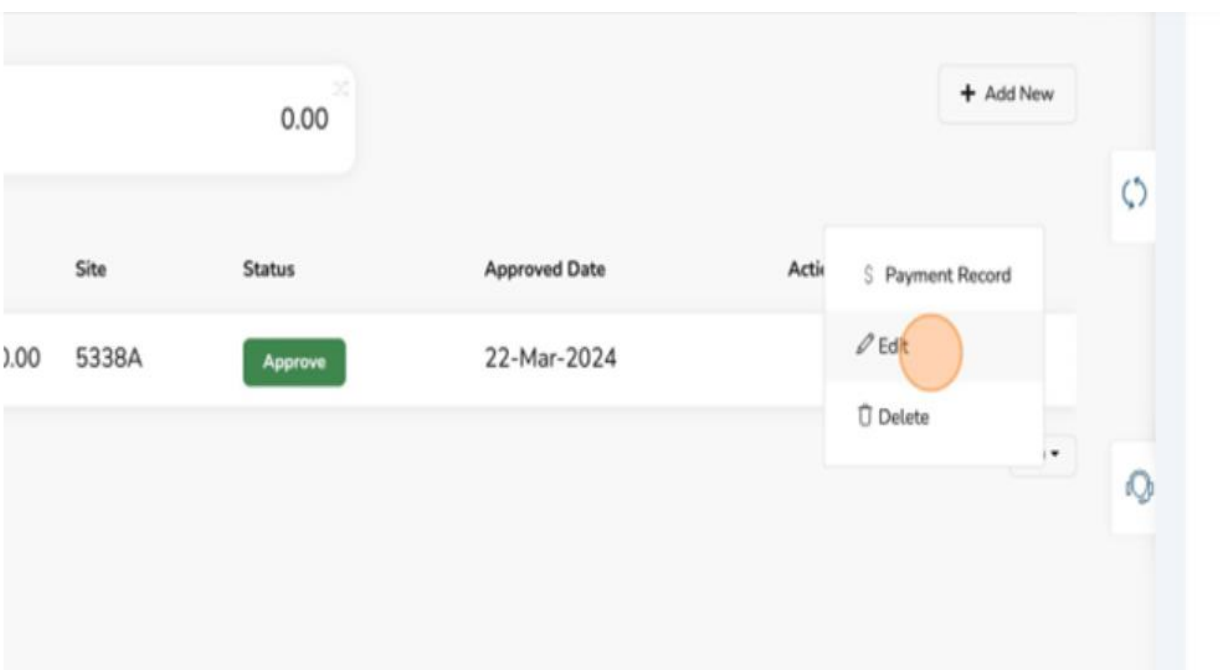
1. Select the client support.



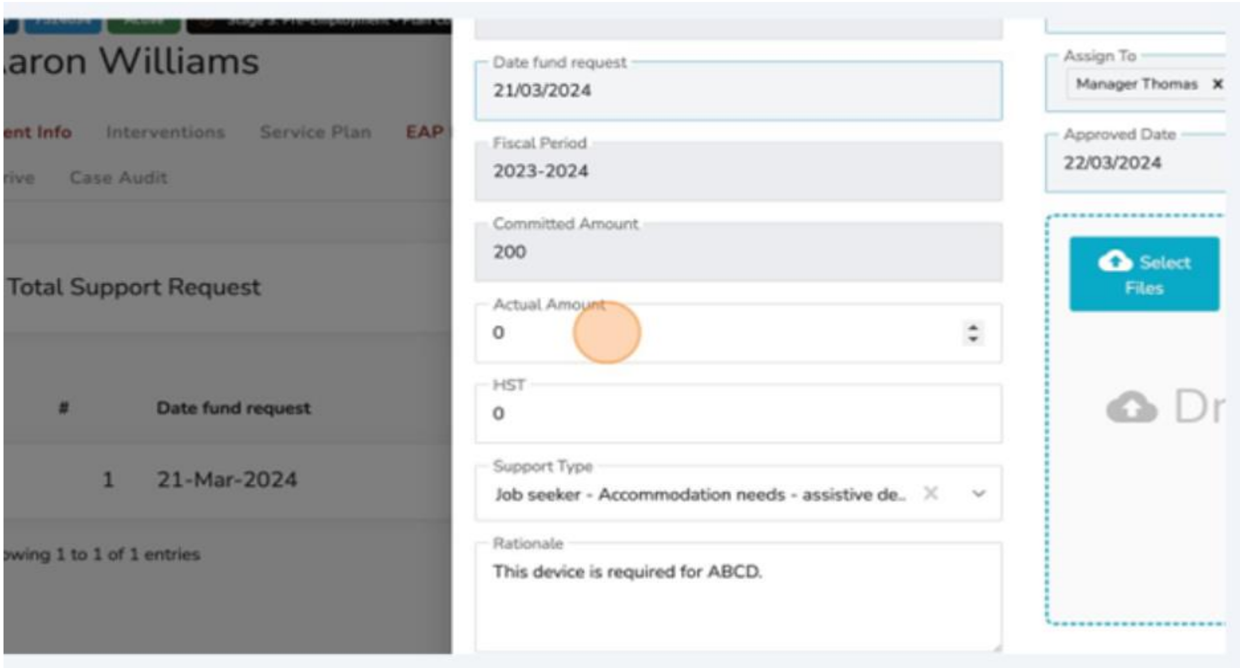
2. Click “Actions.”



3. Click “Edit.”

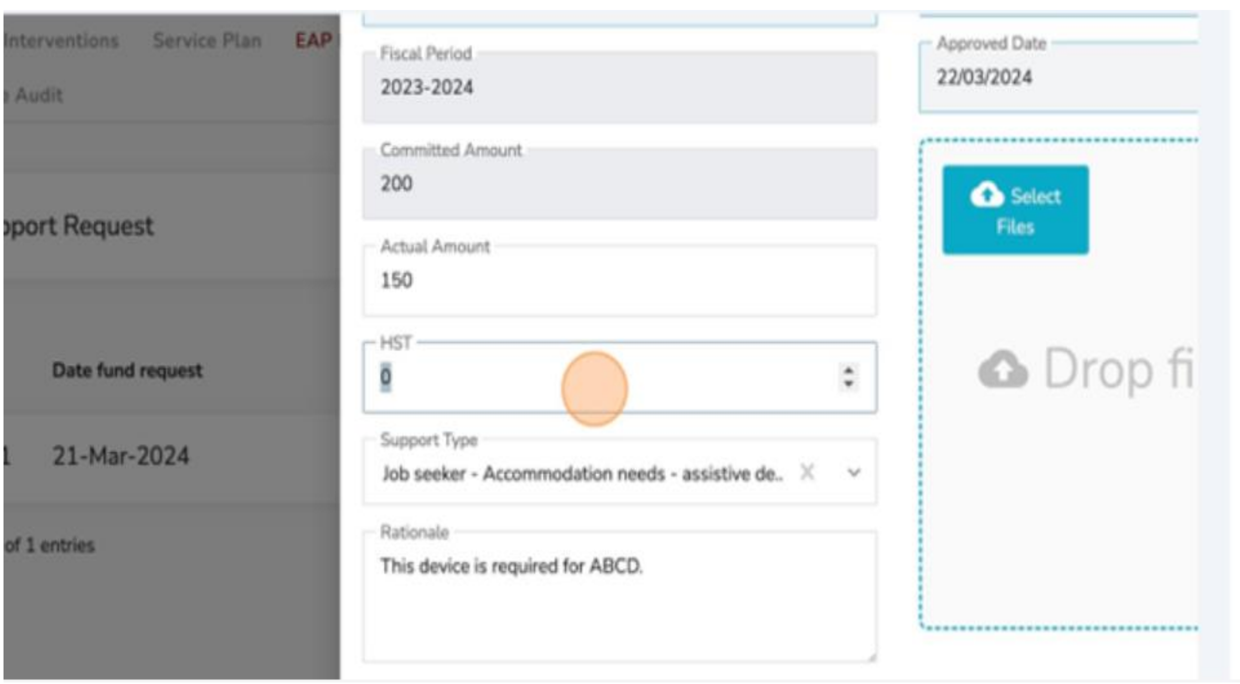


4. Click “Actual Amount” field.

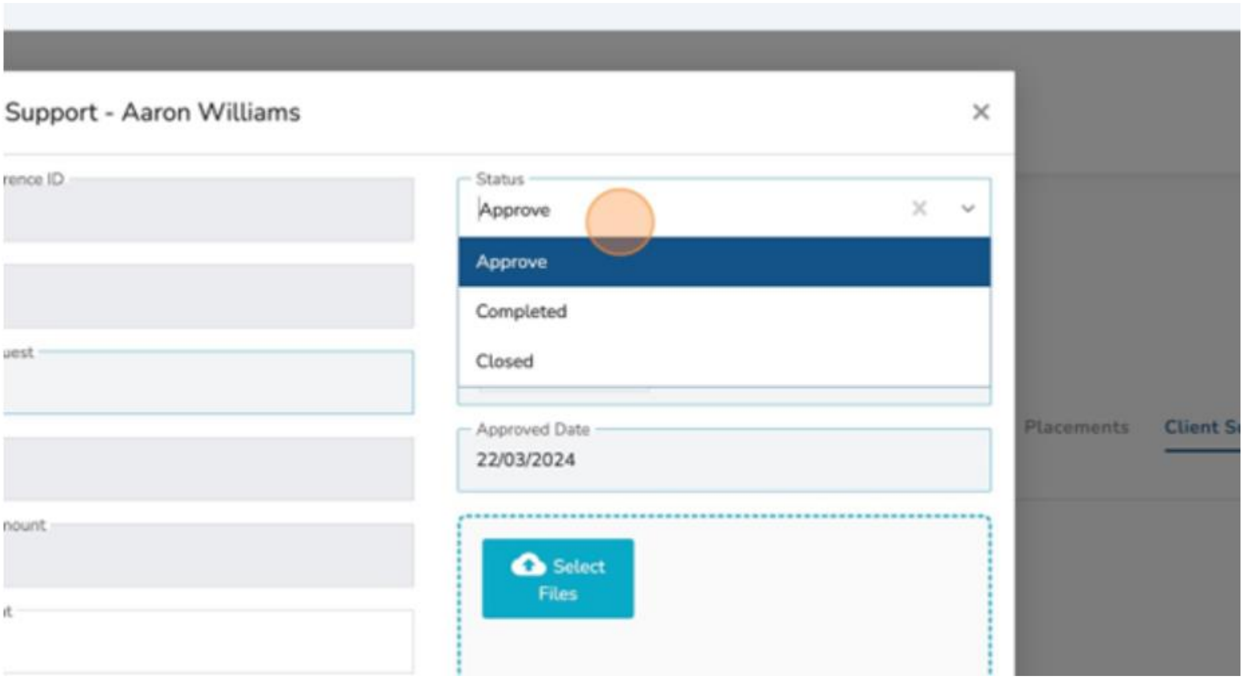


5. Input the appropriate “Actual Amount.”

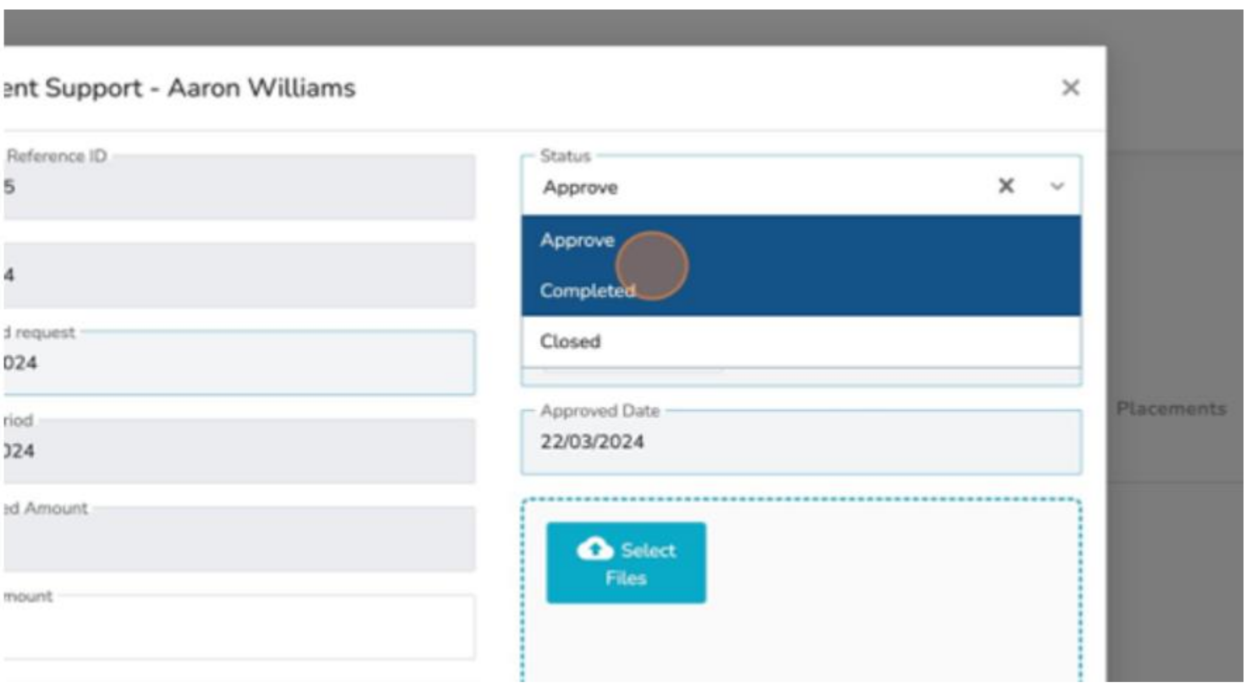
6. Click the “HST” field.



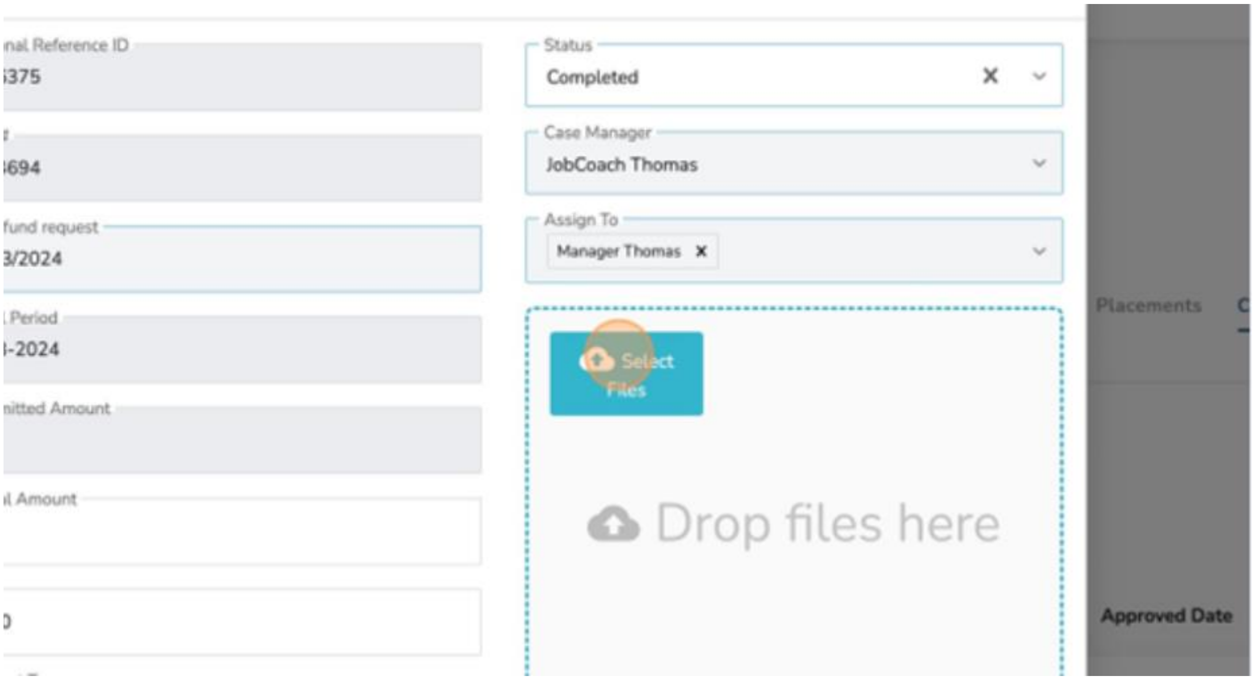
7. Input the appropriate “HST” amount.
8. Click the “Status” field.



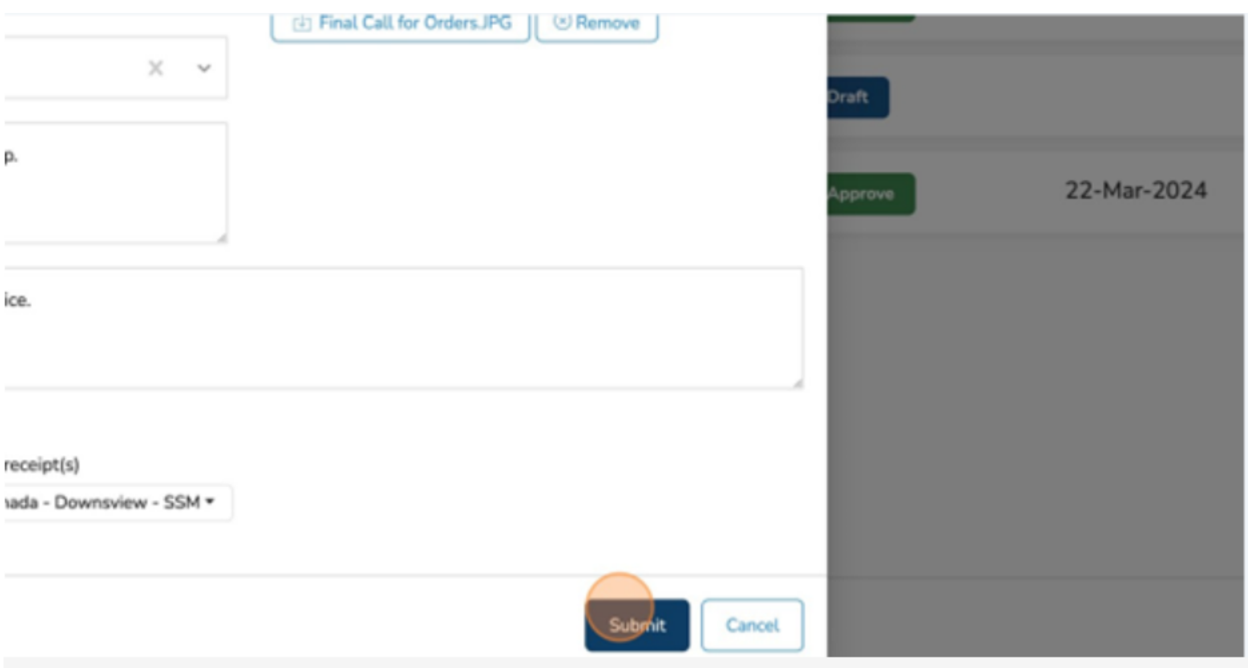
9. Click “Complete.”



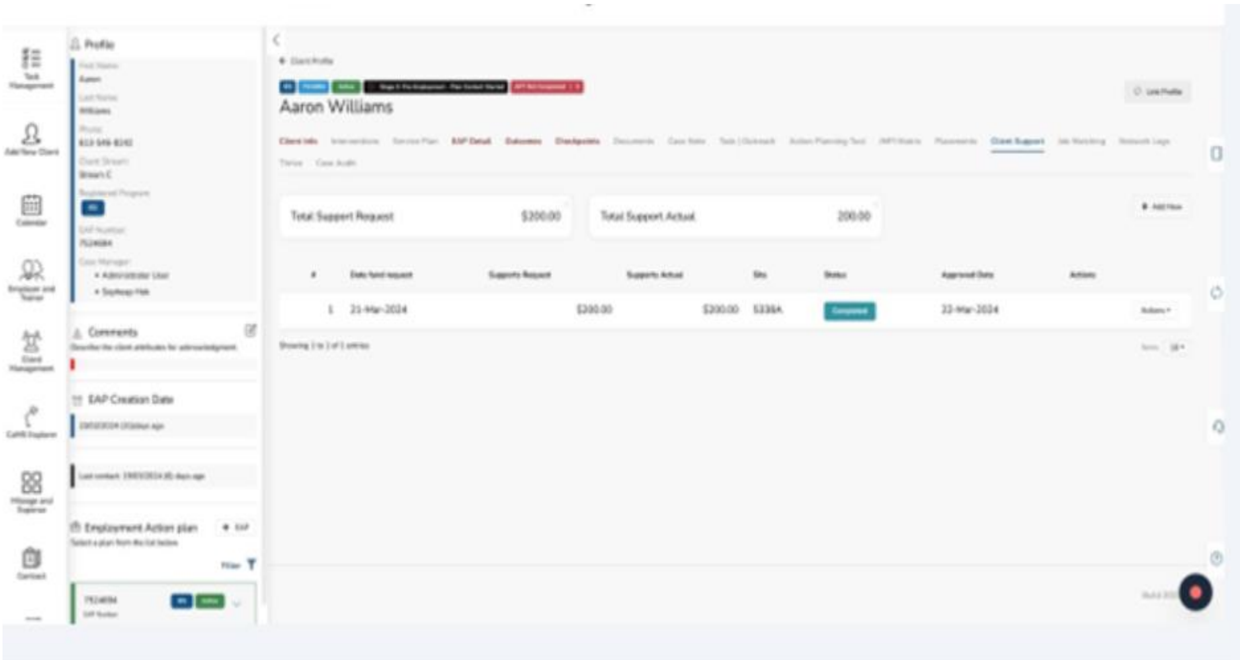
10. Click “Select Files” field and attach the “Receipts” or “Invoices” to validate the information in the “Actual Amount” field.



11. Click “Submit.”



You have successfully completed a client support submission.

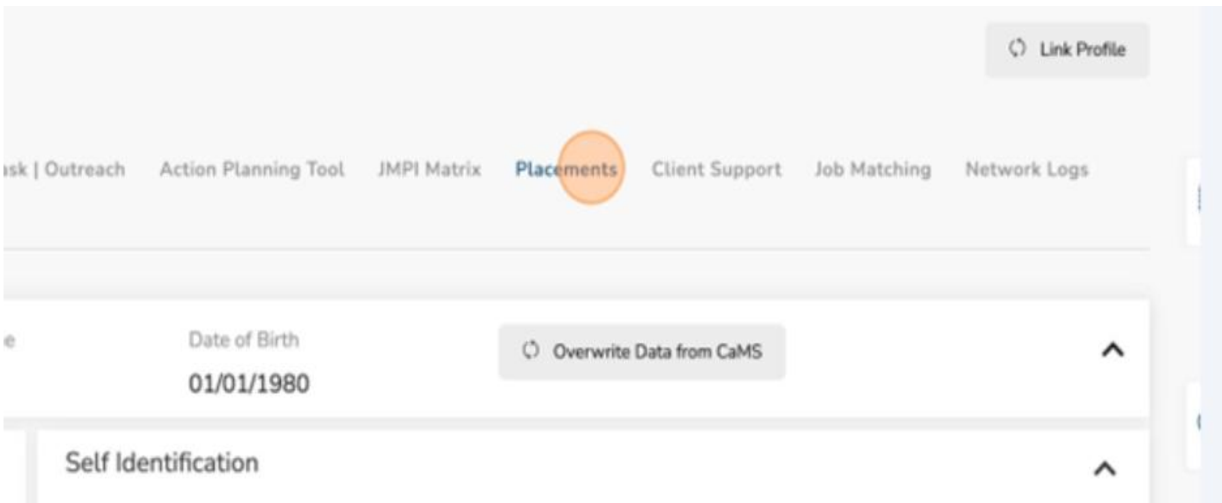


(18) Placements

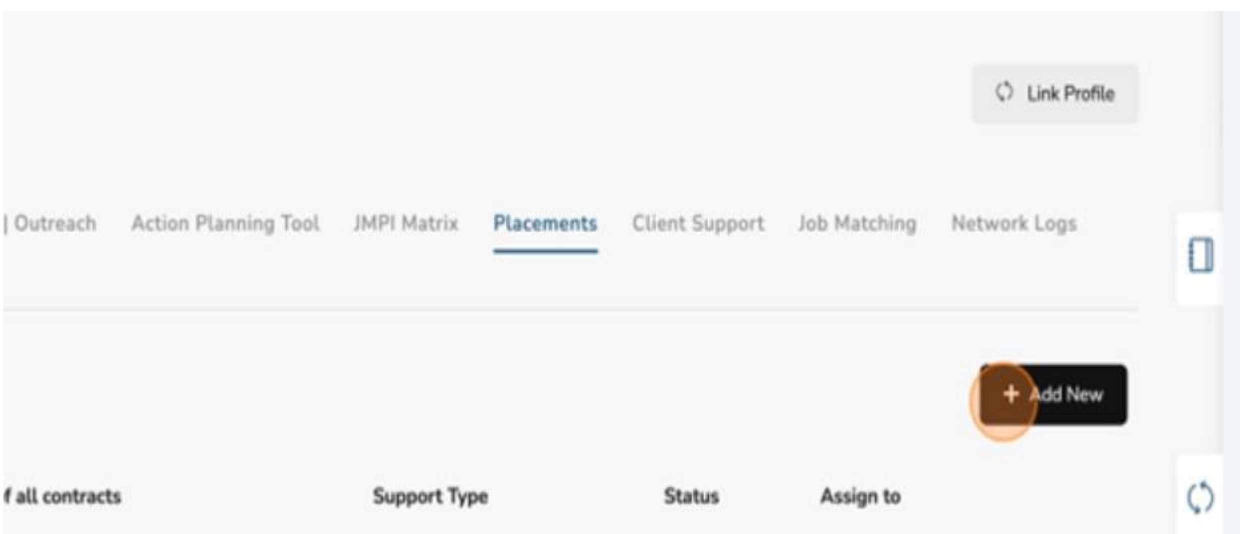
✓ Note: An employer must first be entered into CaMS and linked to ESCases using the Employer Reference Number.

1. Navigate to the “Client Profile.”

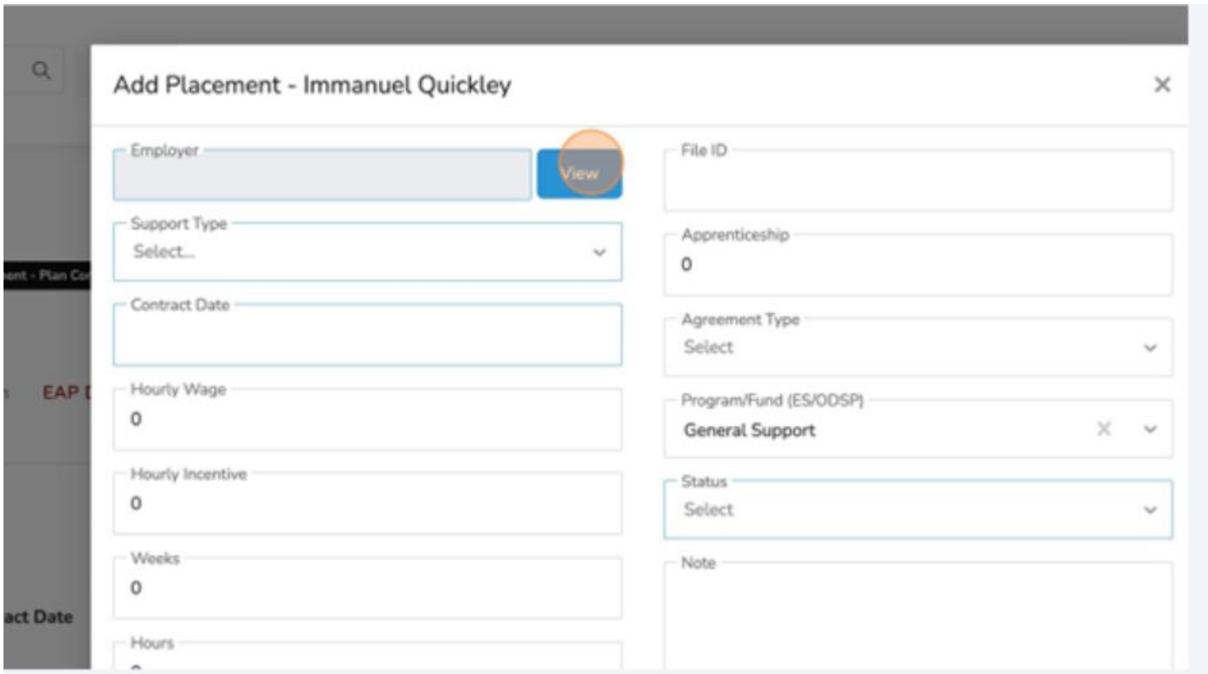
2. Click “Placements.”



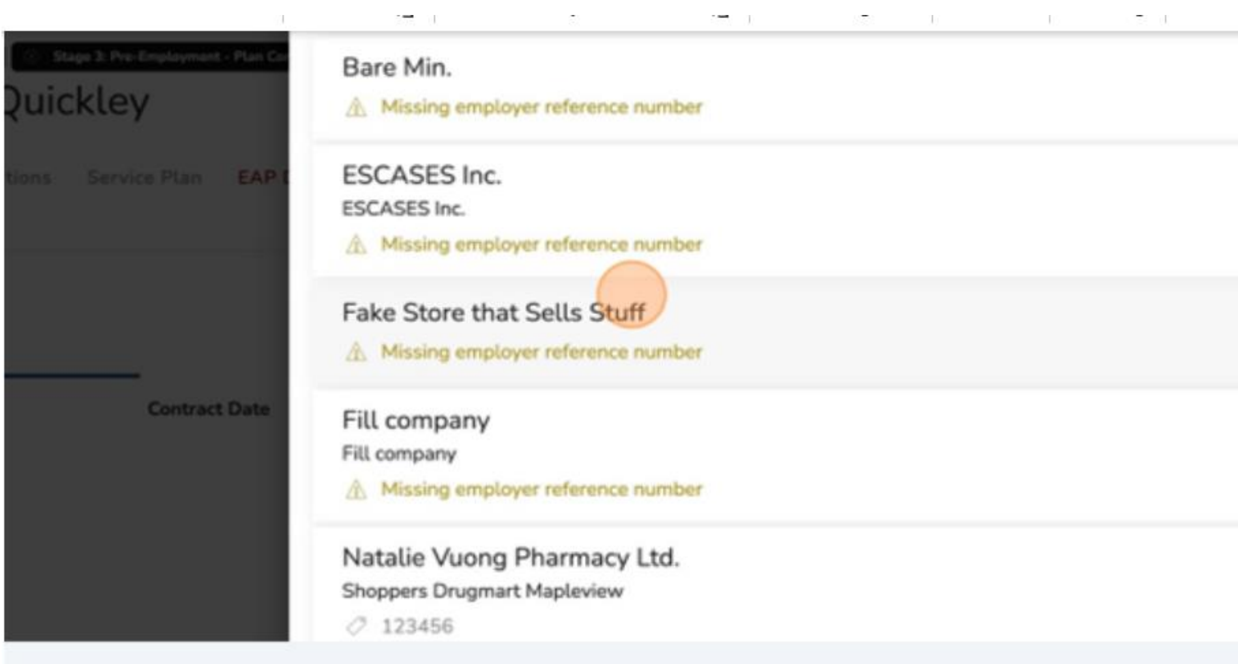
3. Click “Add New.”



4. Click “View.”

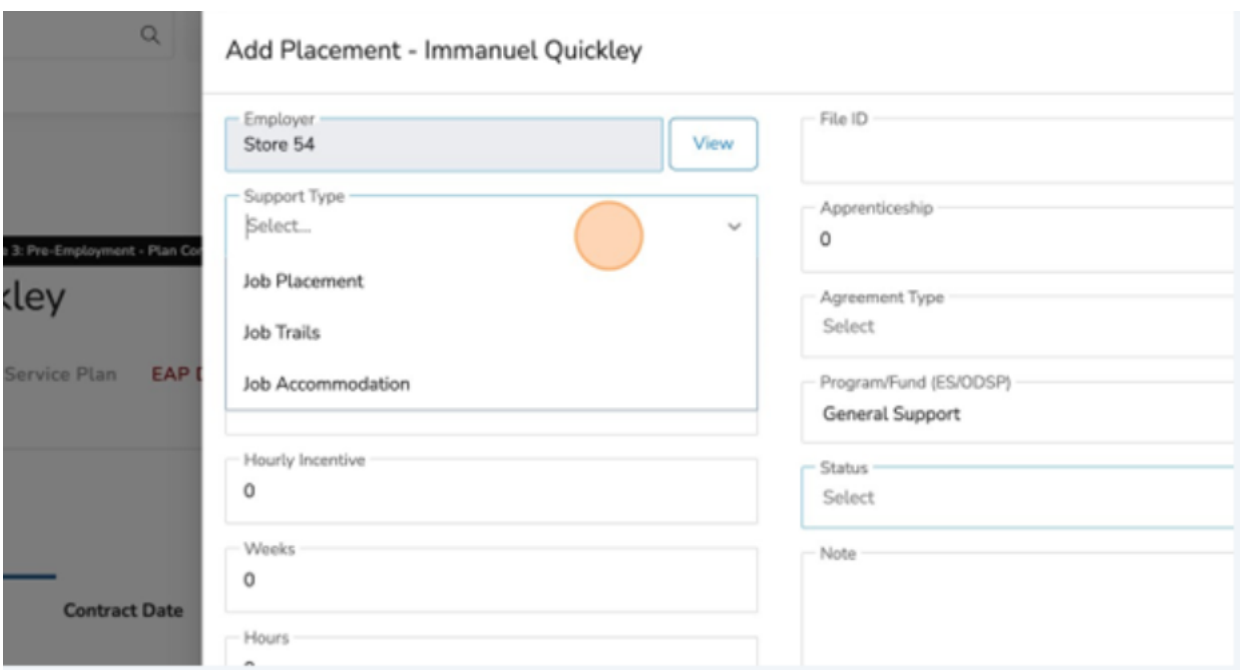


5. Select the Employer for the placement.

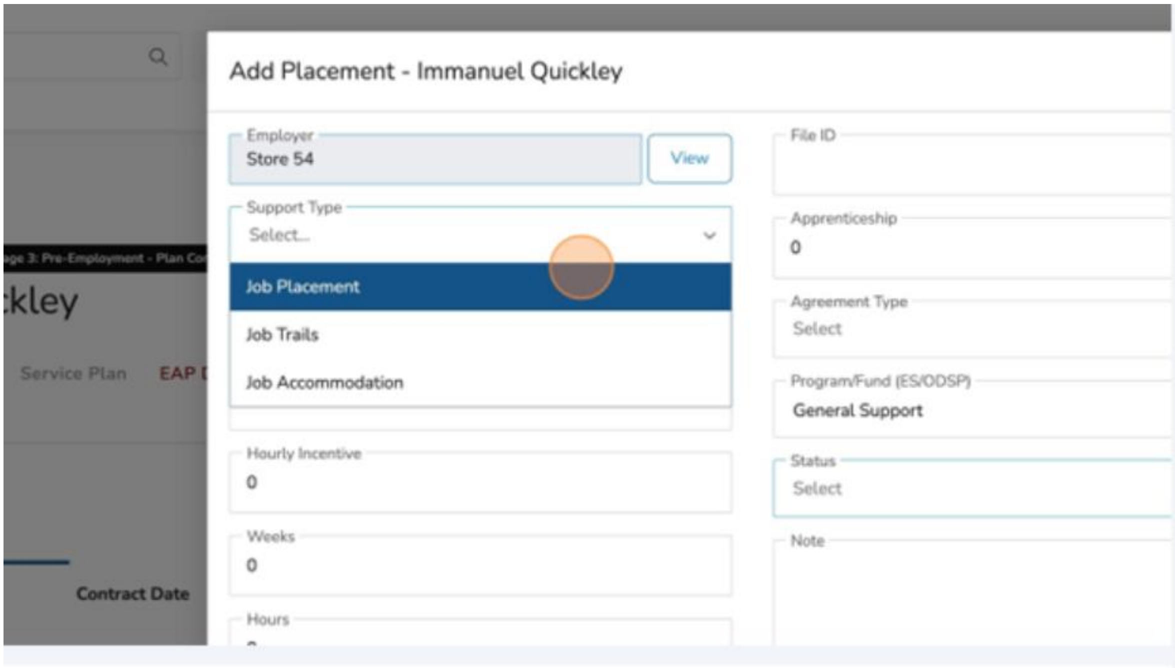


6. When you find the employer for the placement, click “Select.”

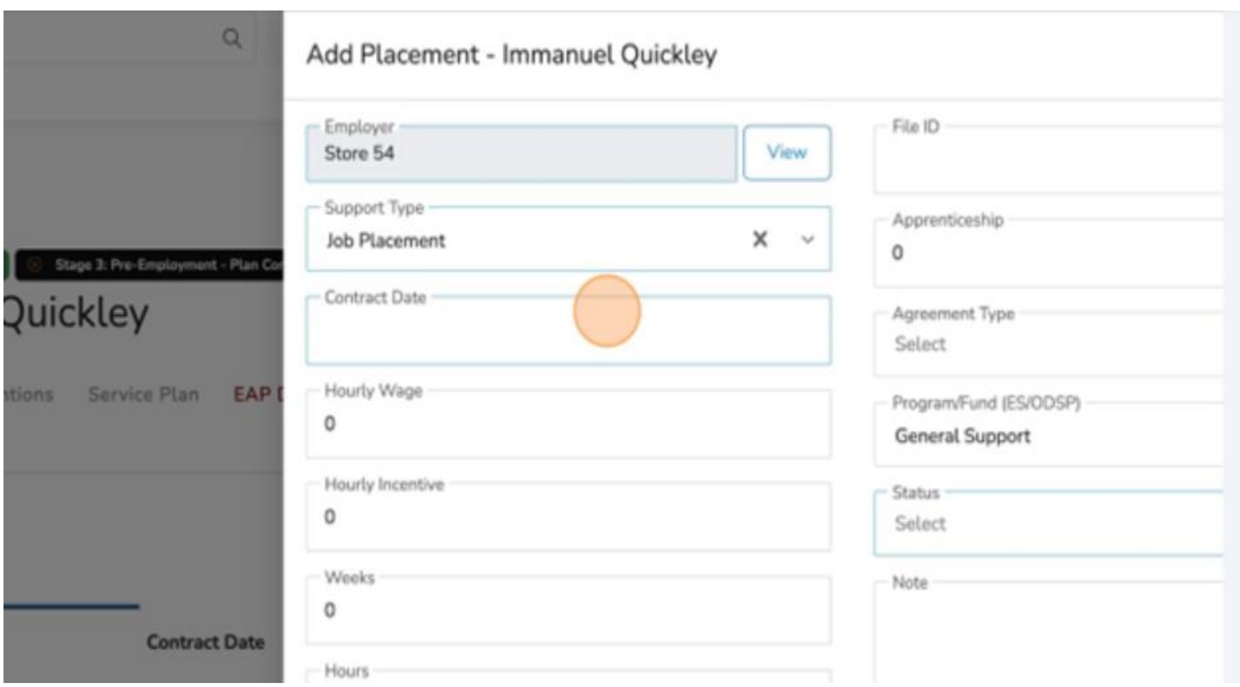
7. Click the “Support Type” field.



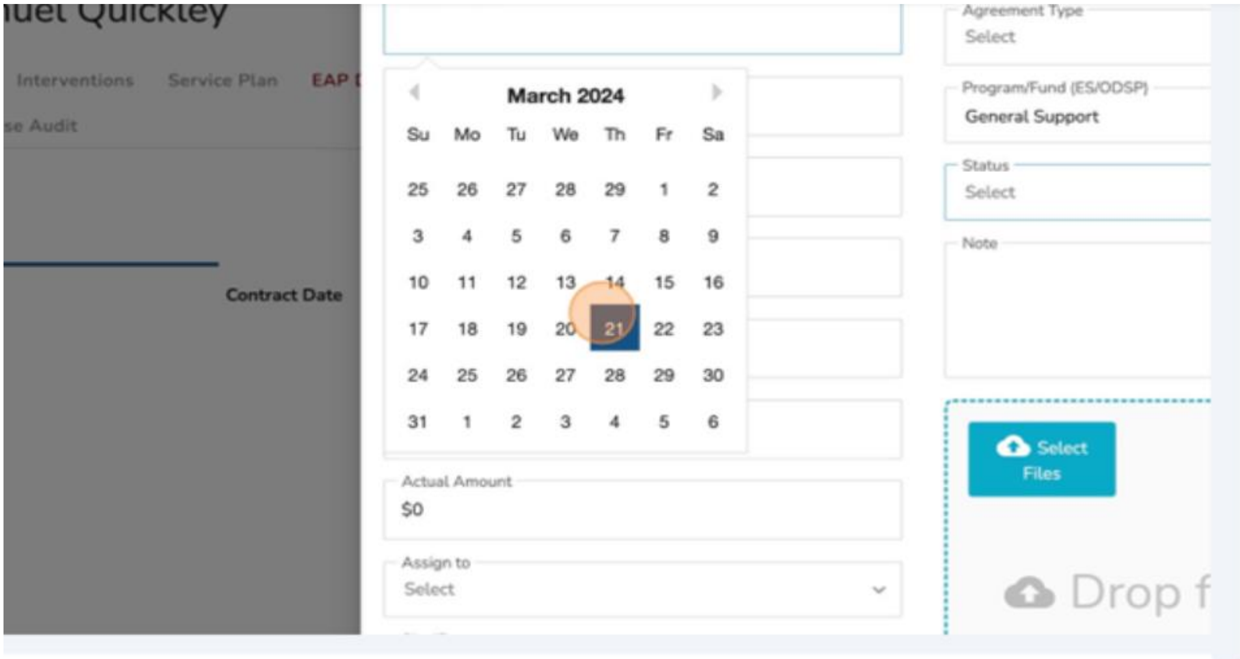
8. Select the appropriate “Support Type.”



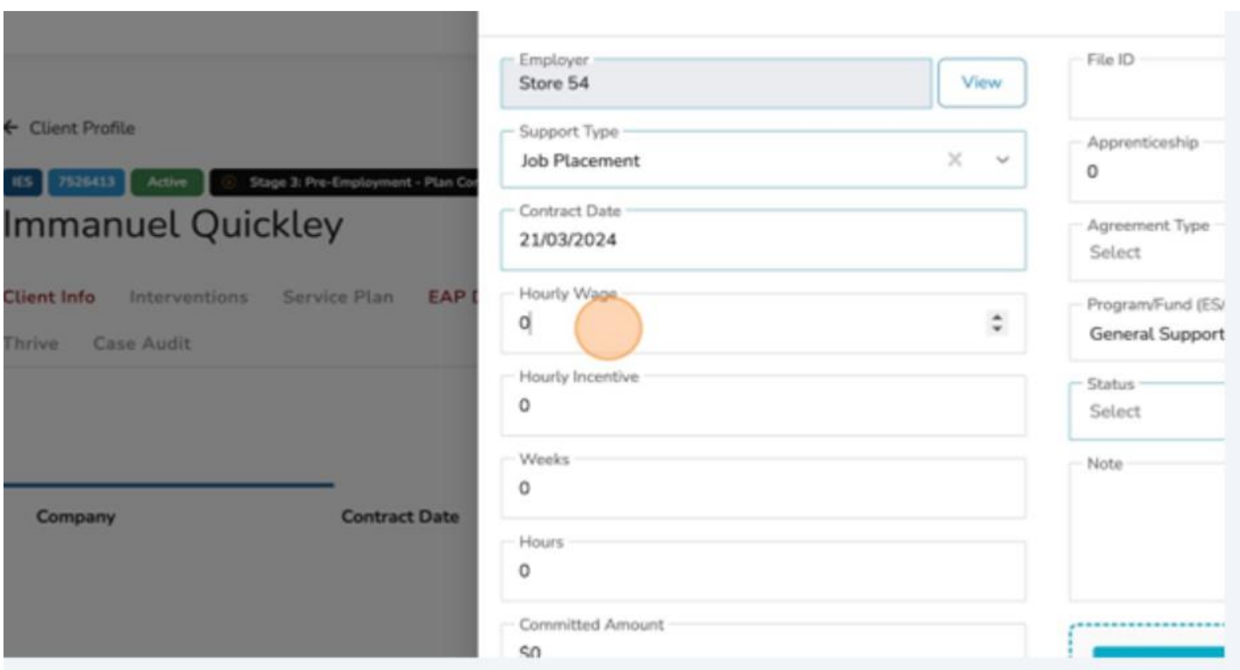
9. Click the “Contract Date” field.



10. Select the appropriate “Contract Date.”

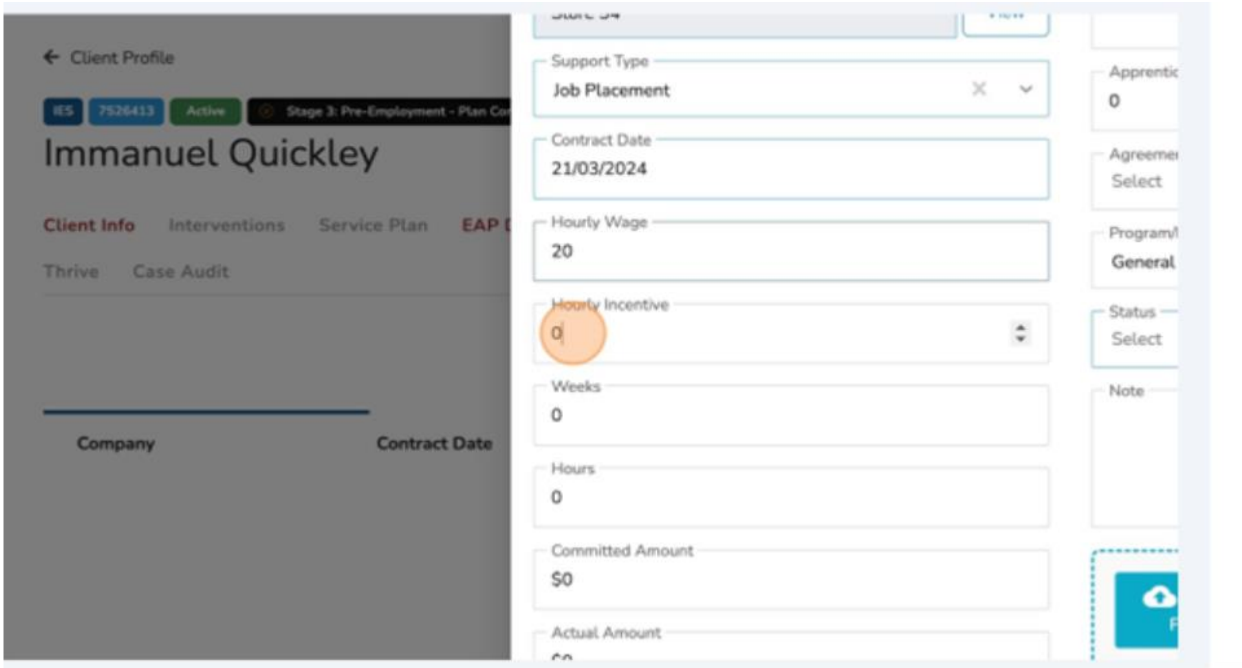


11. Click the “Hourly Wage” field.

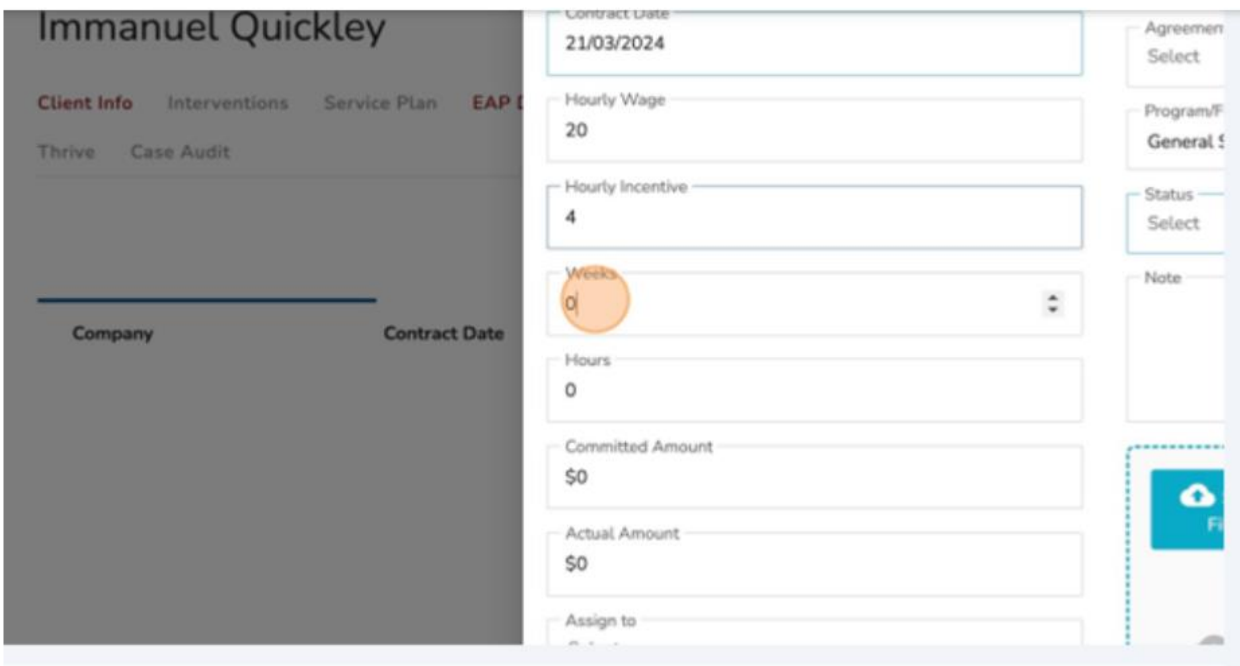


12. Input the appropriate “Houry Wage.”

13. Click the “Hourly incentive” and input the appropriate incentive amount.

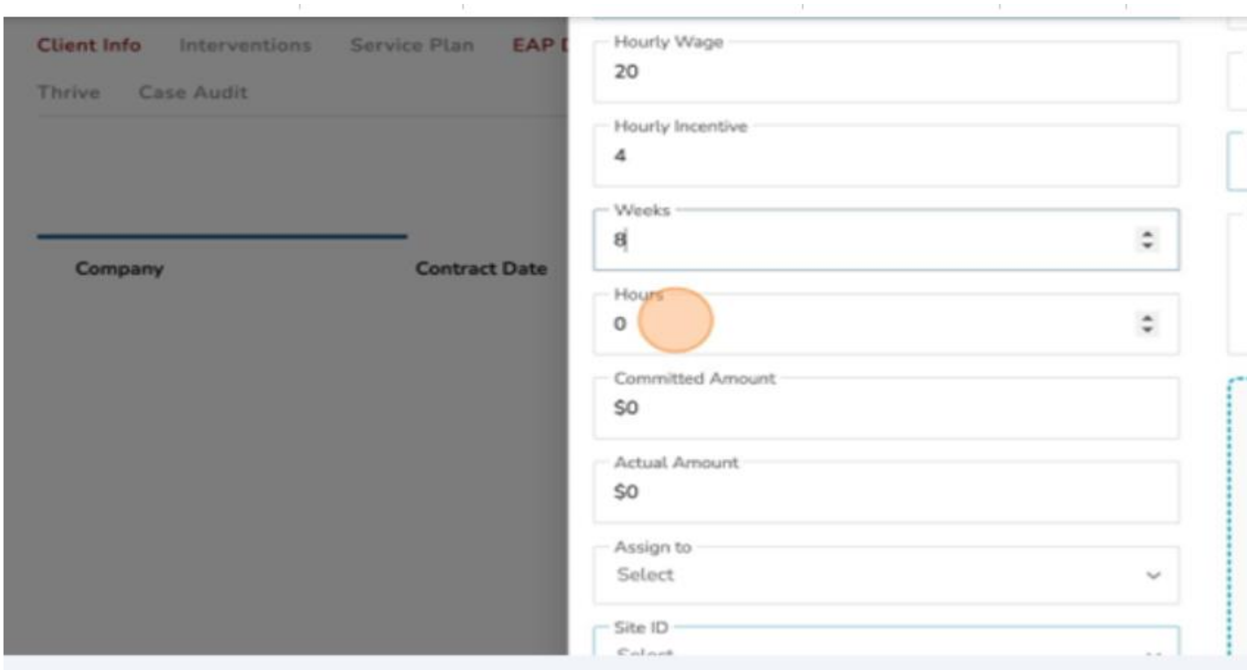


14. Click the “Weeks” field.



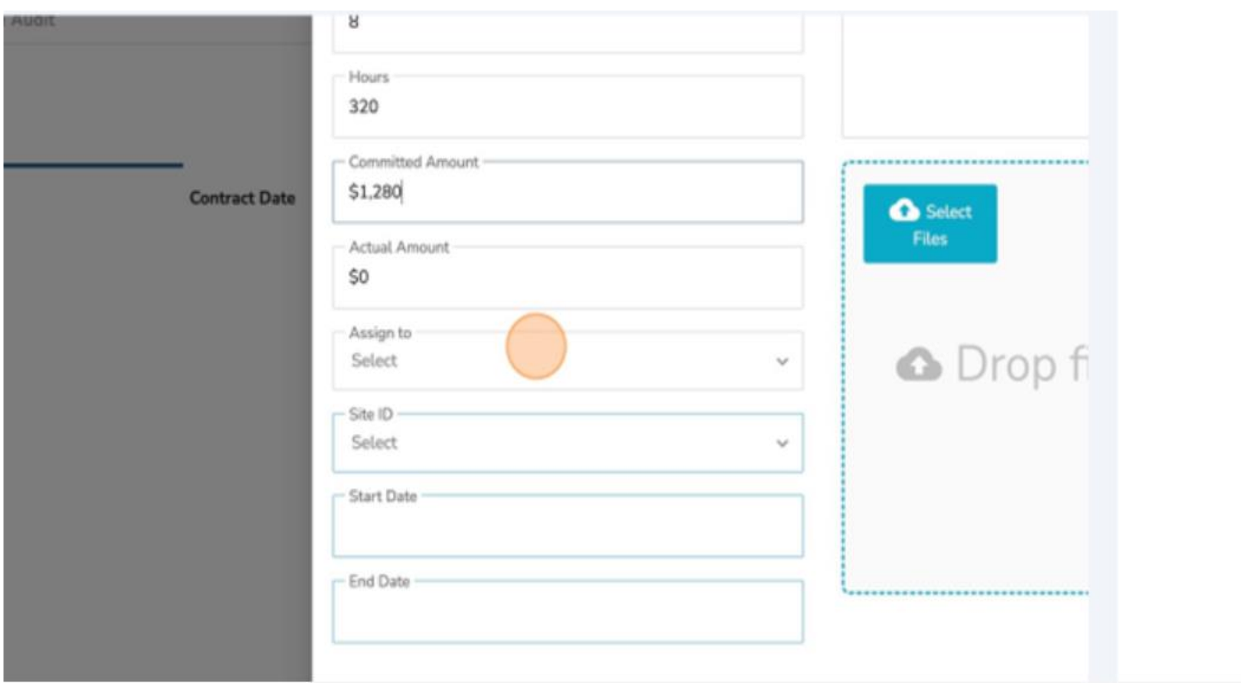
15. Input the appropriate “Weeks” value.

16. Click the “Hours” field.



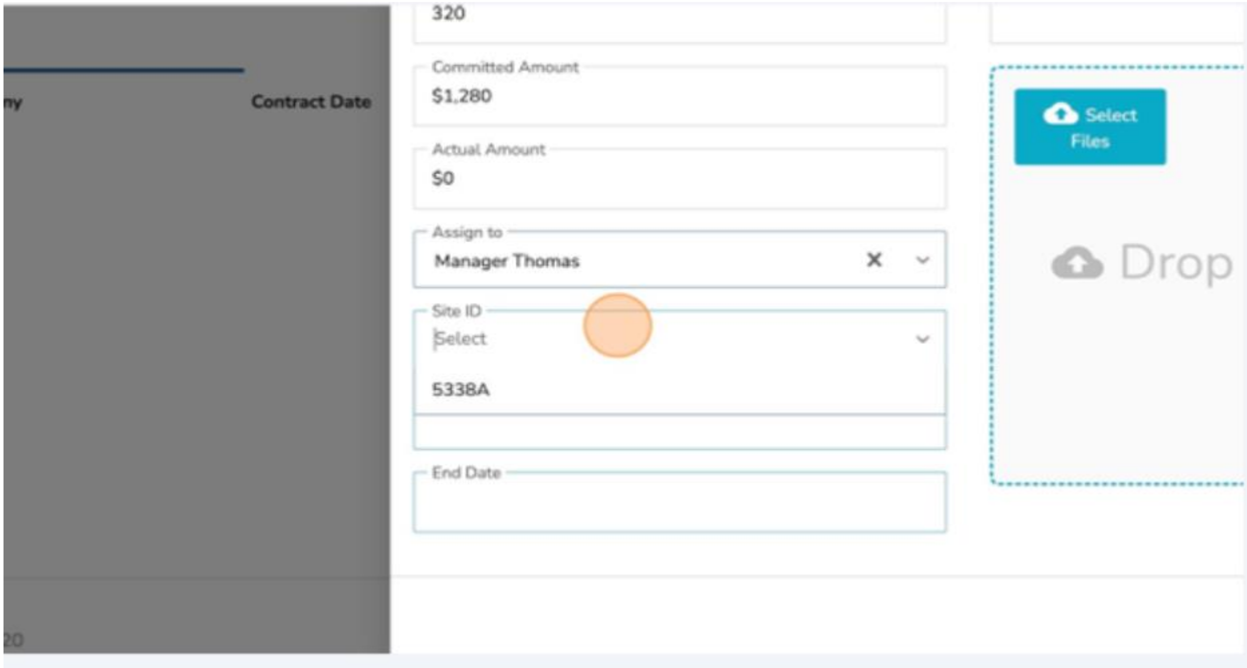
17. Input the appropriate “Hours” amount.

18. Click the “Assign to” field.

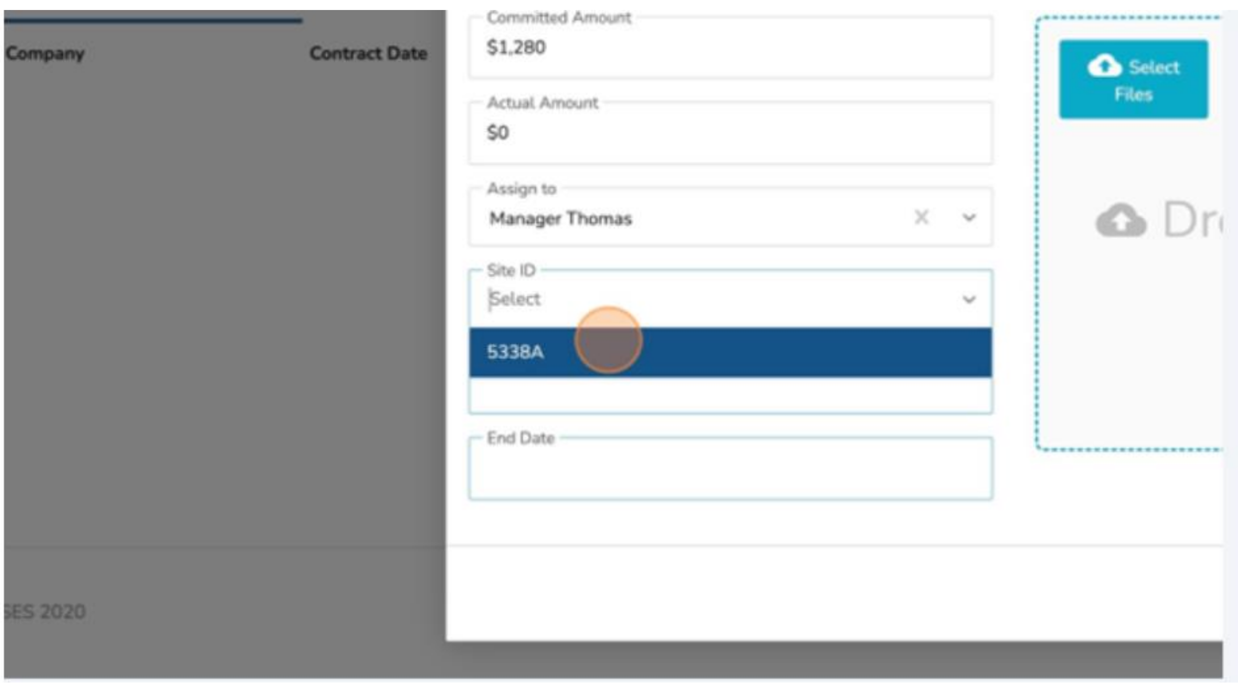


19. Select the appropriate staff from the drop down.

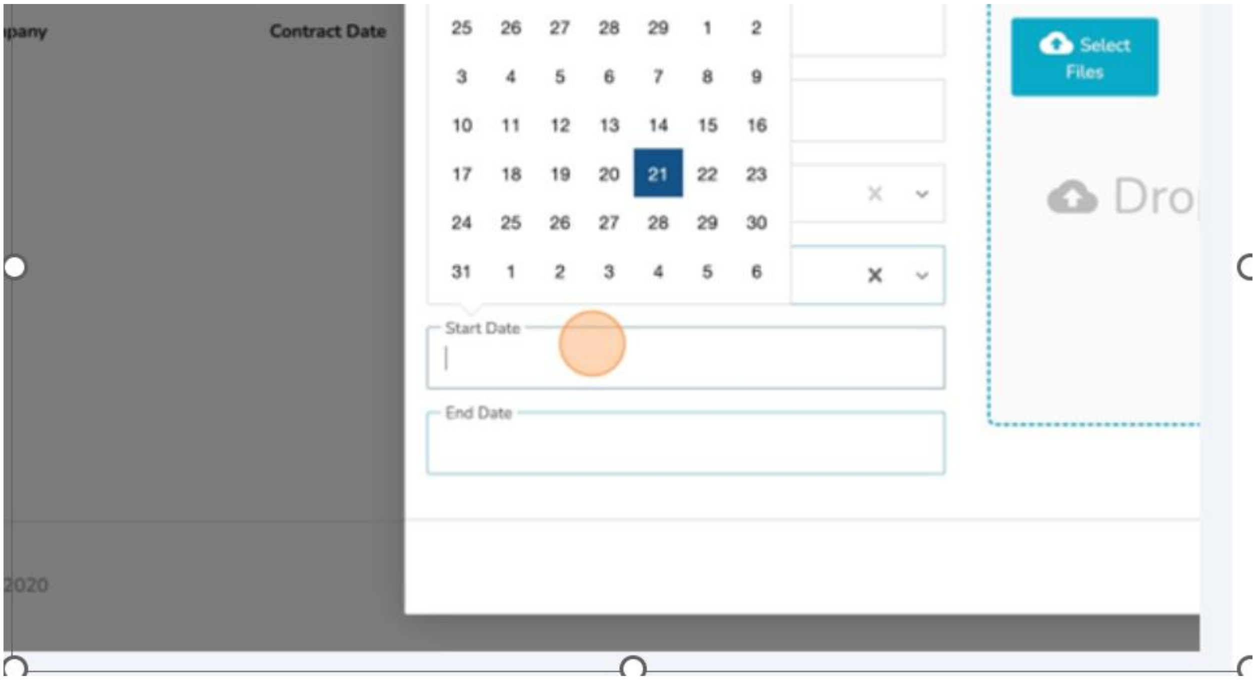
20. Select the “Site ID” field.



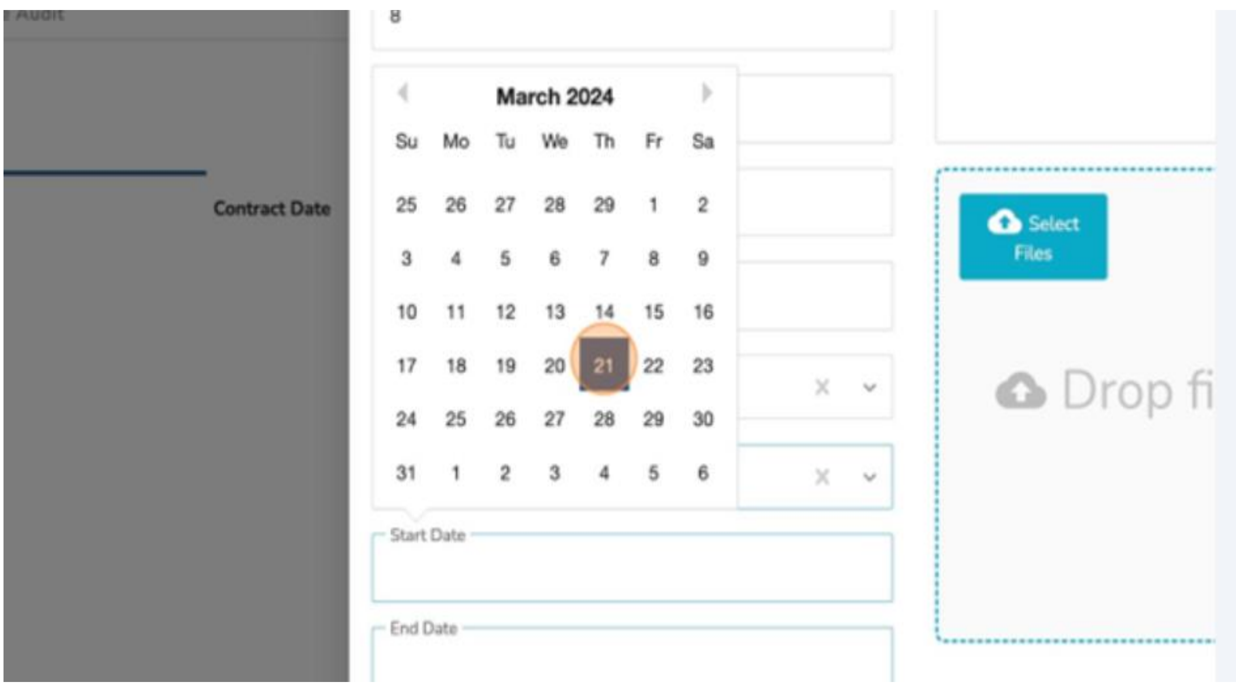
21. Select the appropriate “Site ID.”



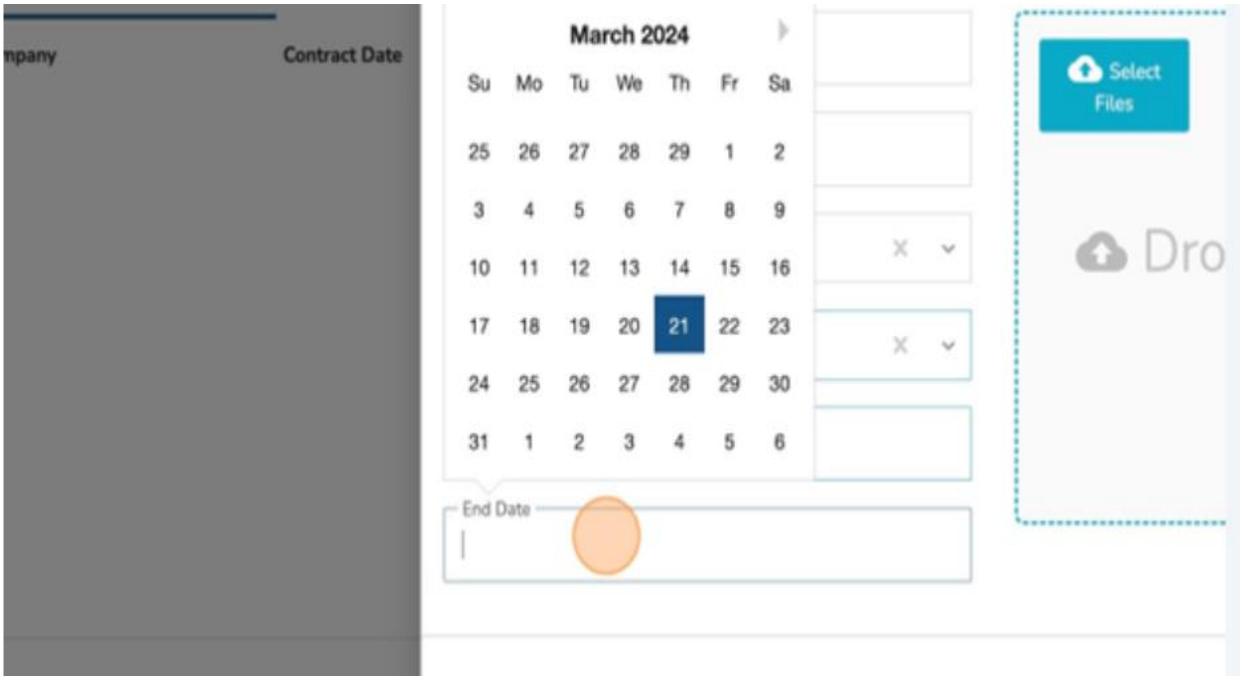
22. Select the “Start Date” field.



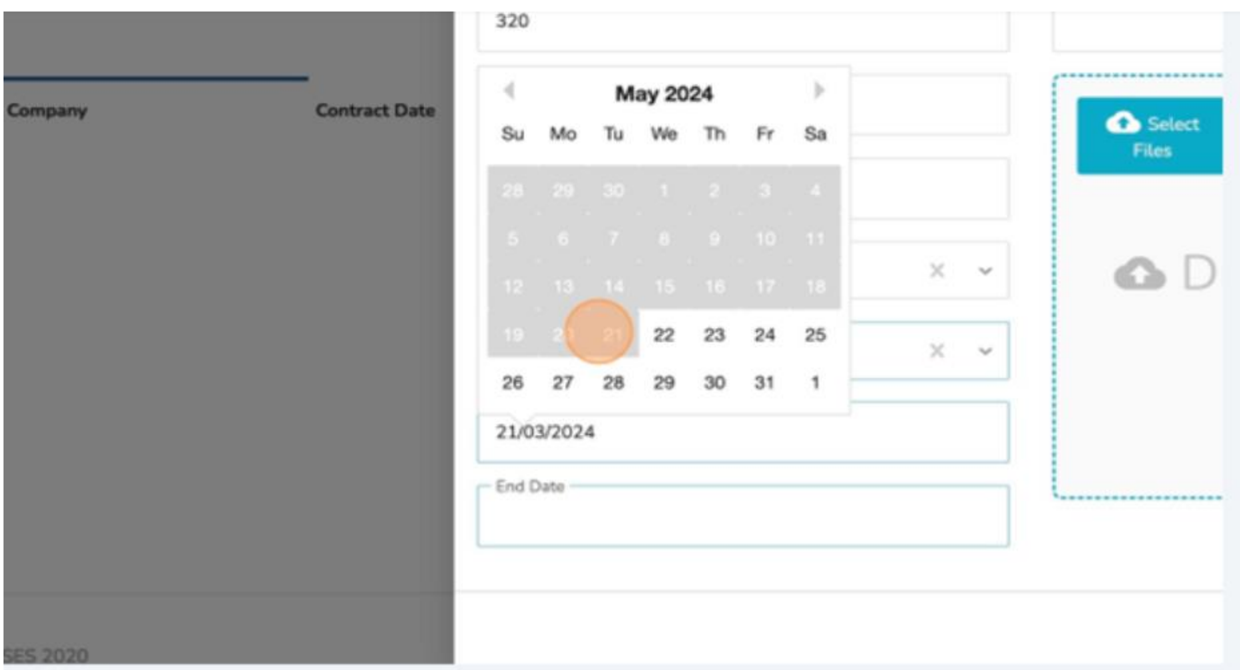
23. Select the appropriate “Start Date.”



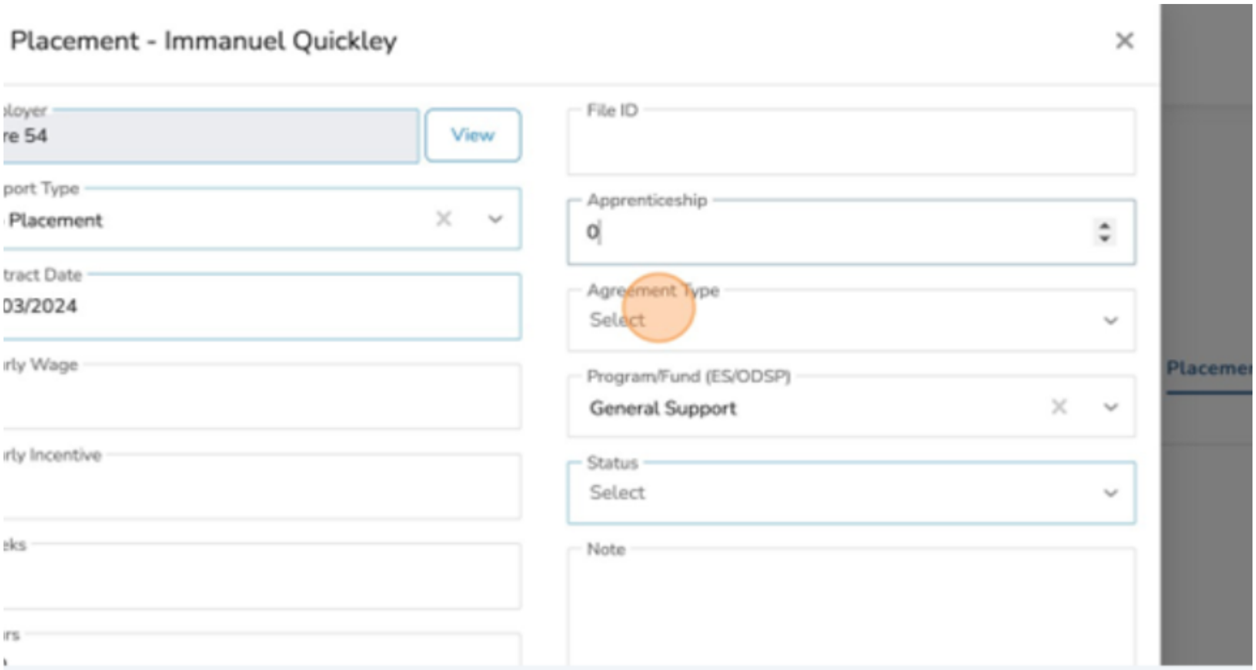
24. Click the “End Date” field.



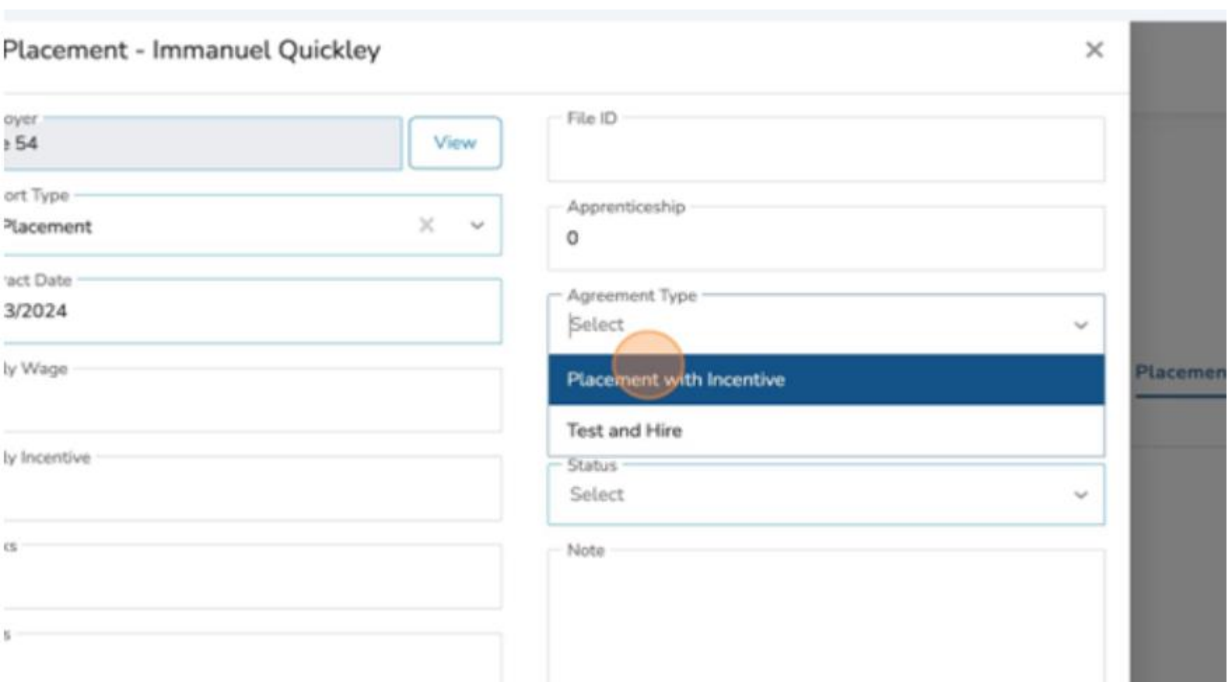
25. Select the appropriate “End Date.”



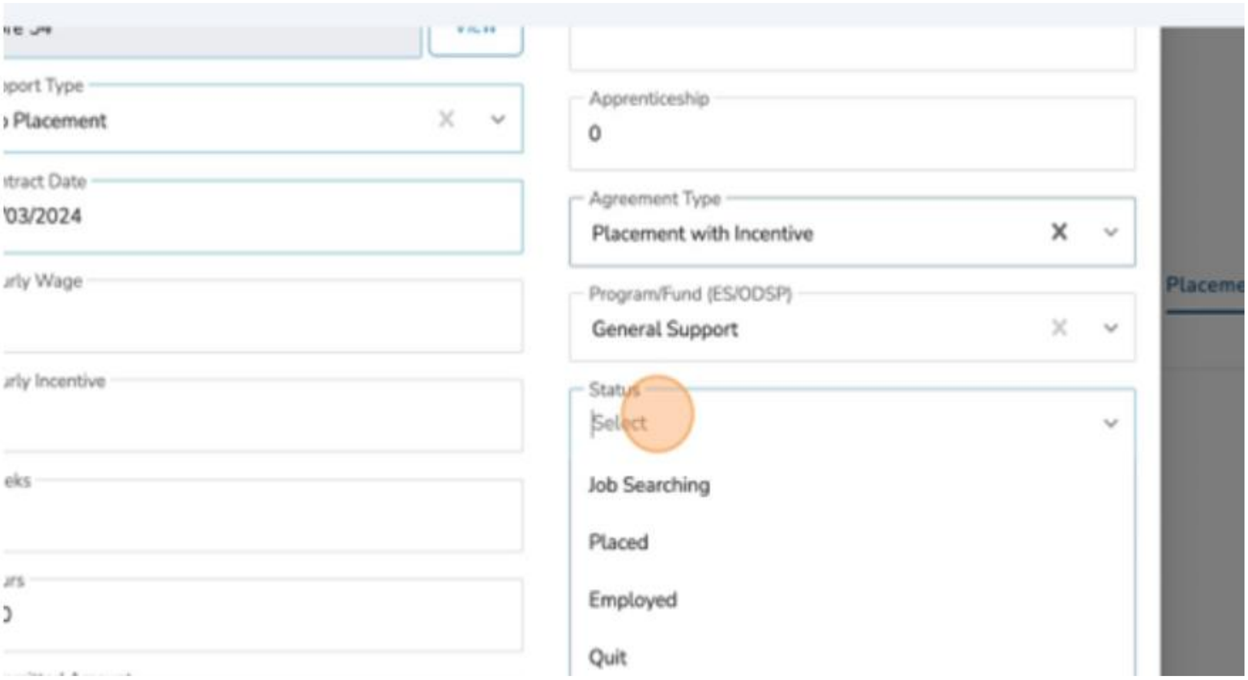
26. Click “Agreement Type.”



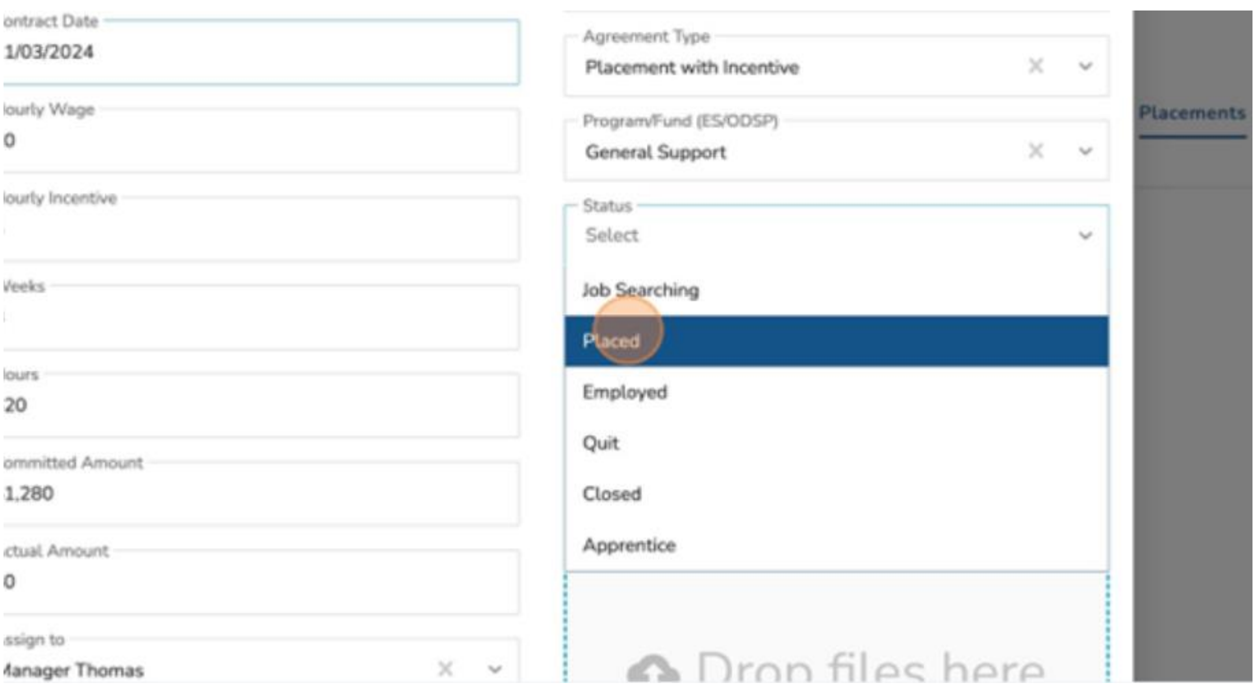
27. Select the appropriate “Agreement Type.”



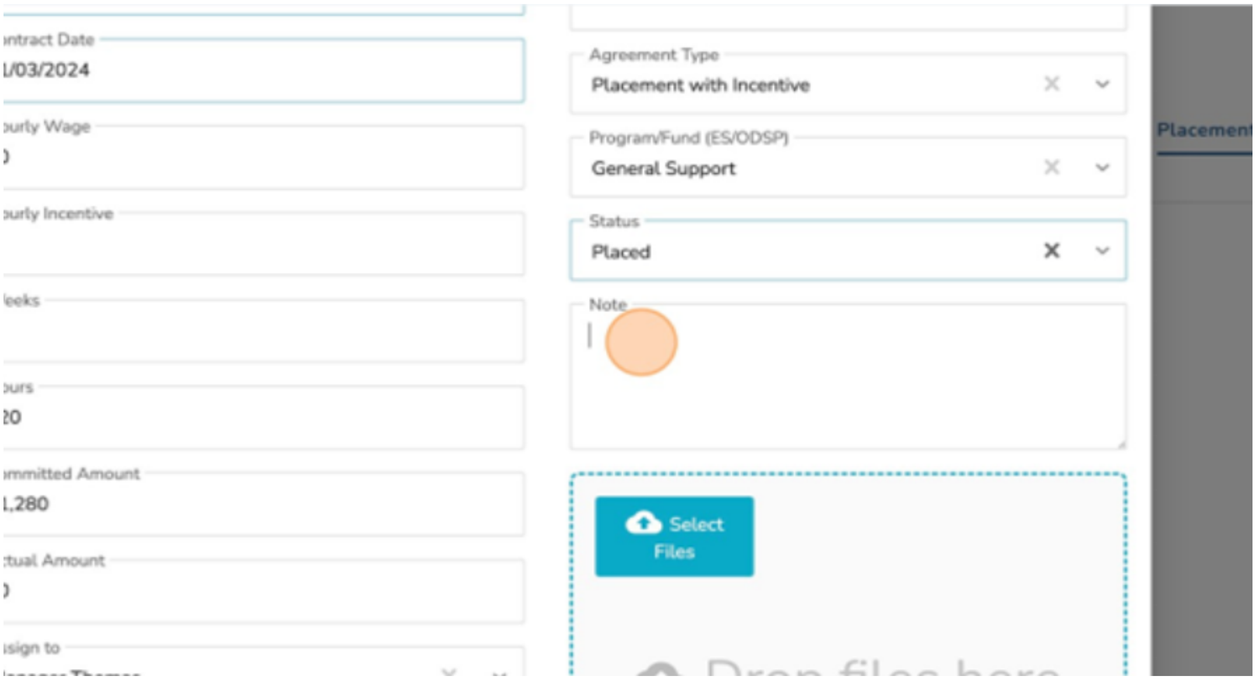
28. Click the “Status” field.



29. Select the appropriate “Status.”

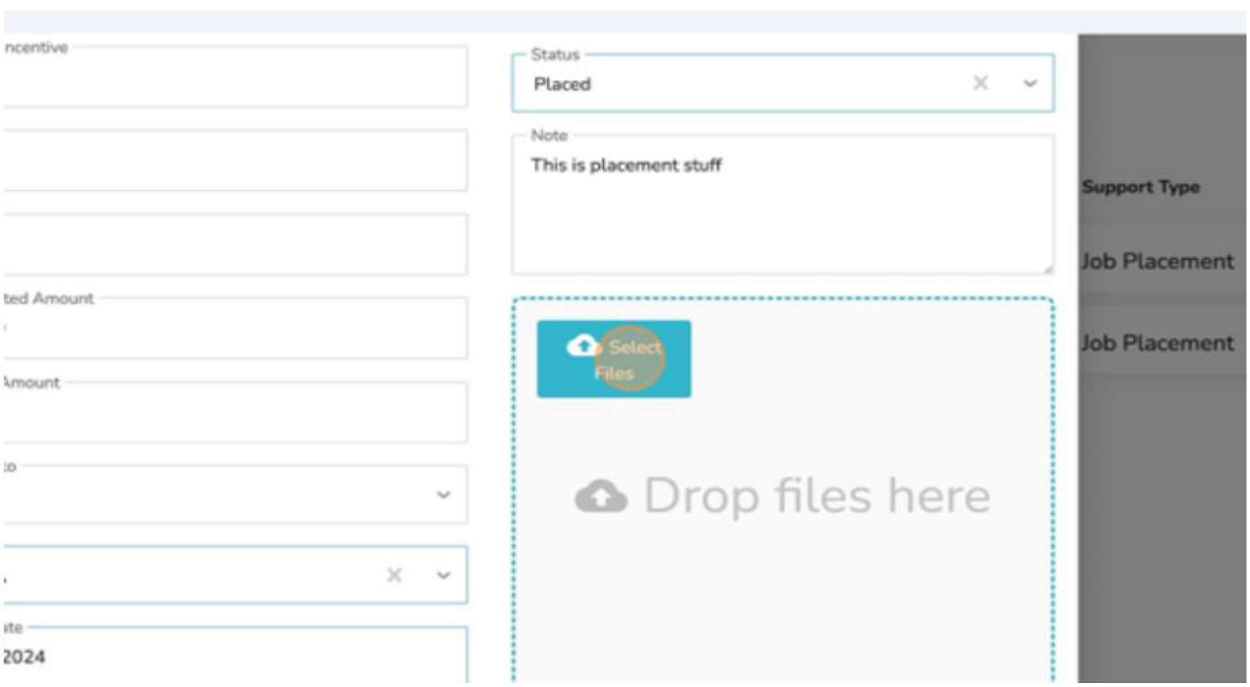


30. Click the “Note” field.

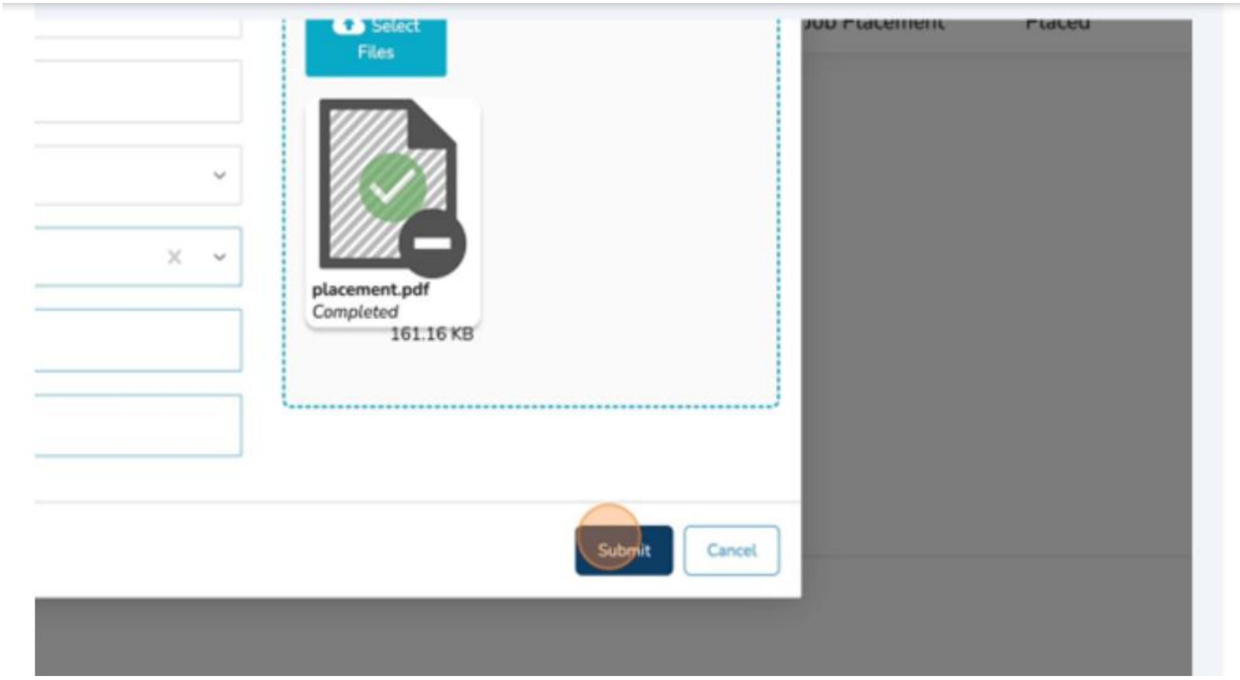


31. Insert the appropriate “Note.”

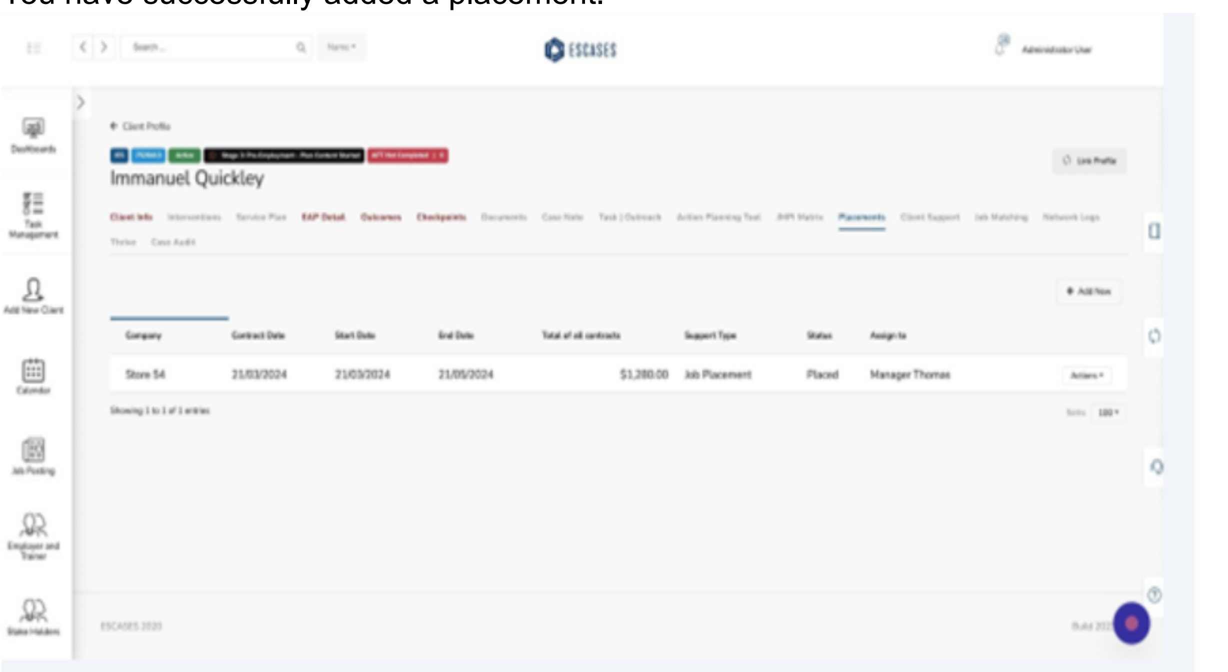
32. Click the “Select Files” upload box to attach the placement document(s).



33. Click “Submit.”



You have successfully added a placement.

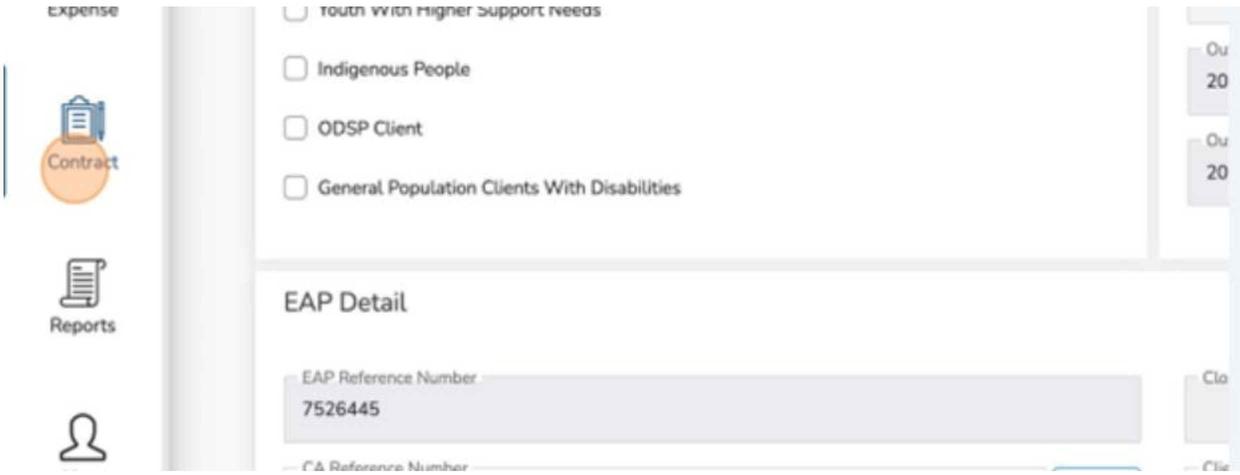


(19) Budget Settings - Contract

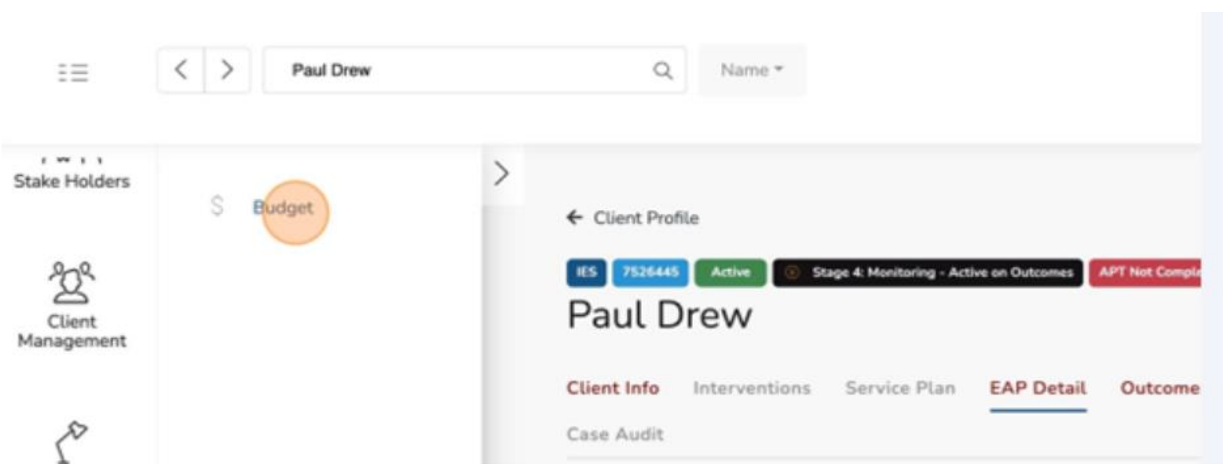
❖ There are several areas to set the budget for your organization. This can be accomplished through the Contract section in ESCases.

1. Click on the three lines at the top left-hand corner.

2. Click “Contract” on the left navigation bar.

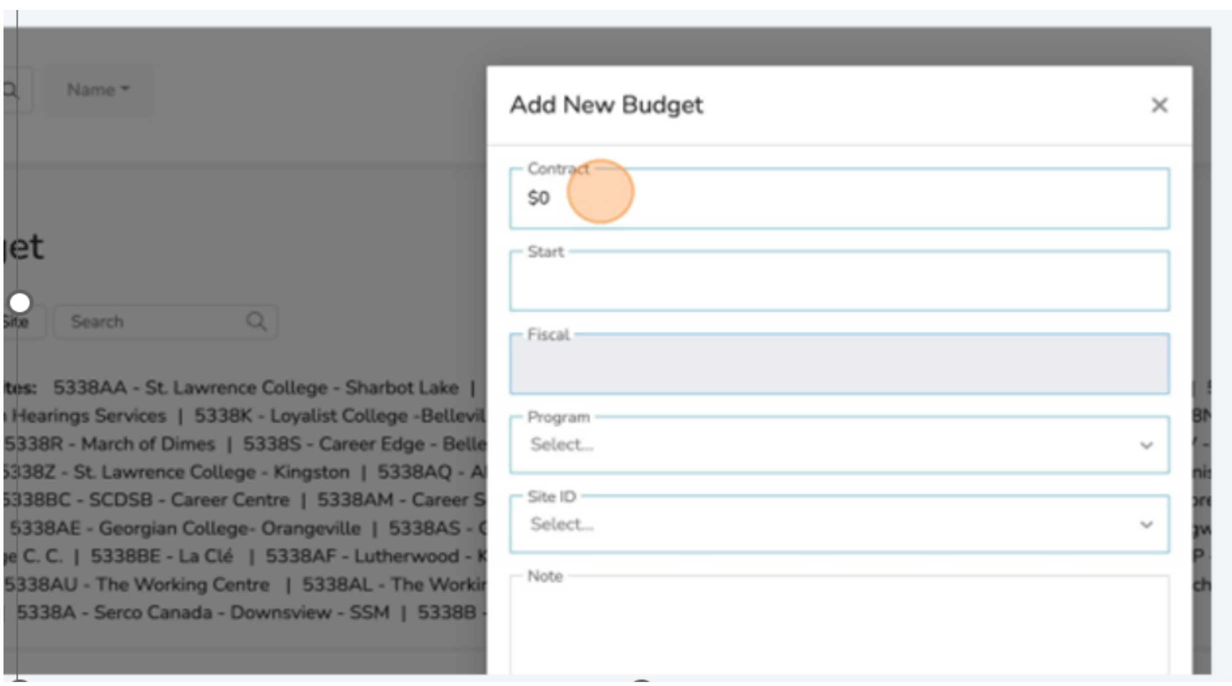


3. Click “Budget.”



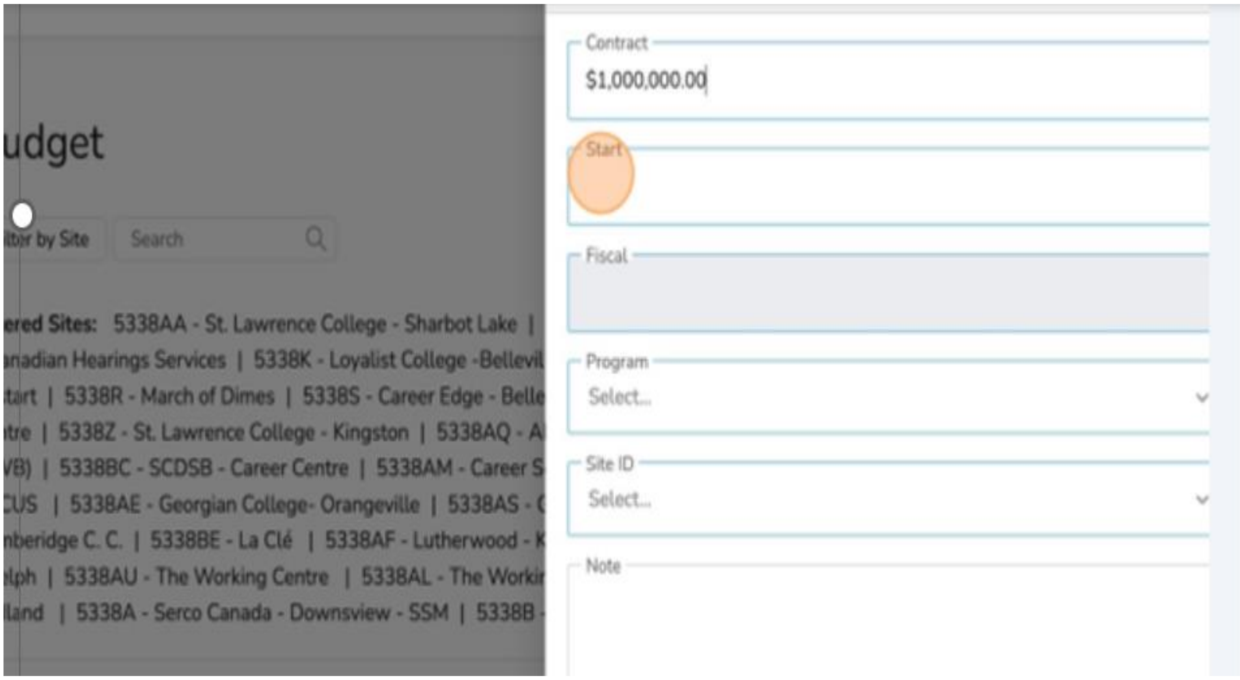
4. Click “Add New.”

5. Click the “Contract” field.

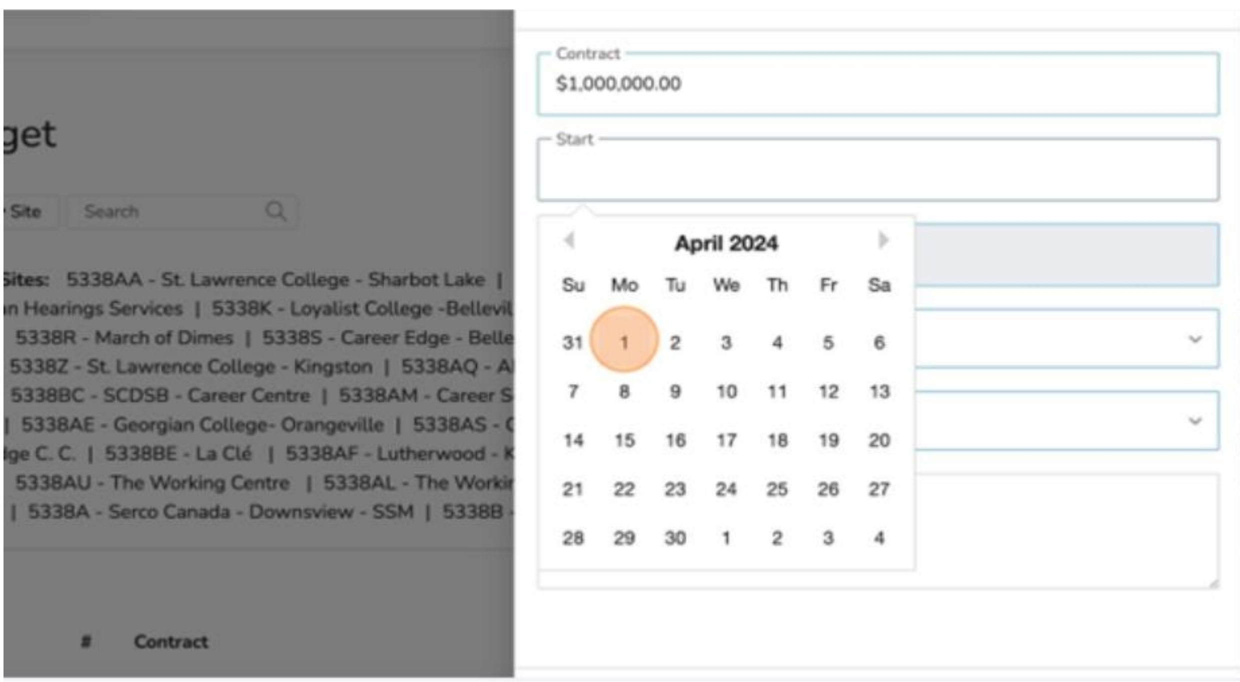


6. Input the appropriate budget amount.

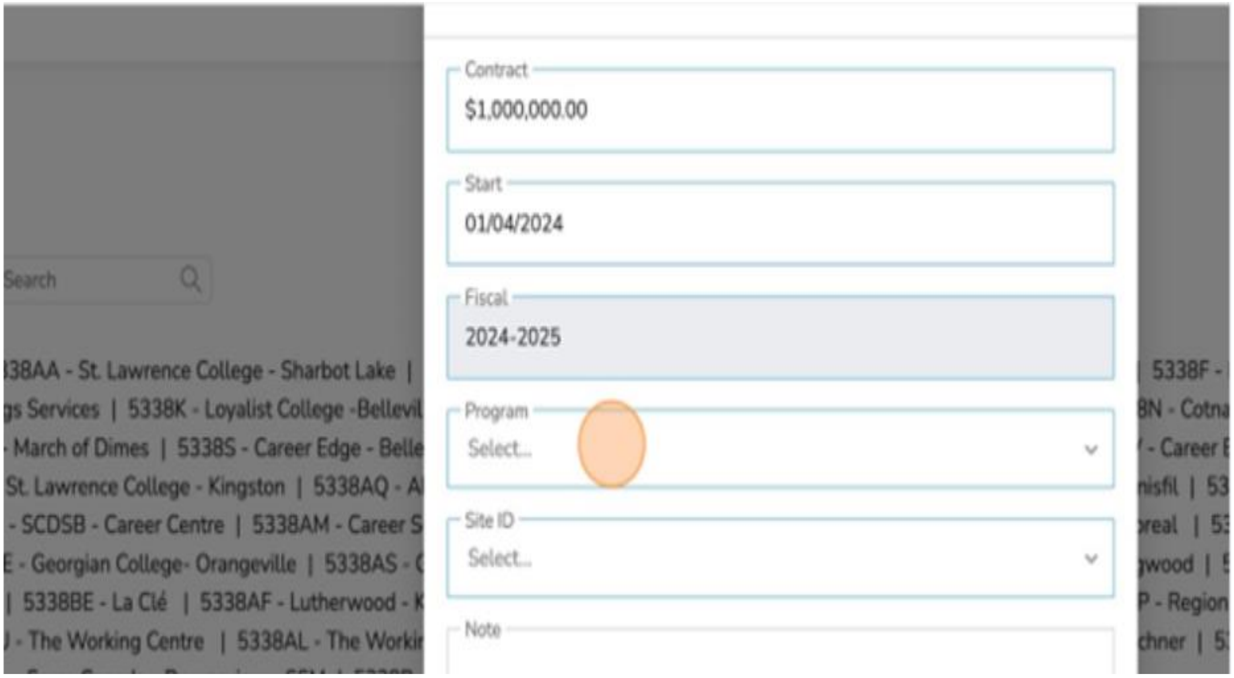
7. Click the “Start” field.



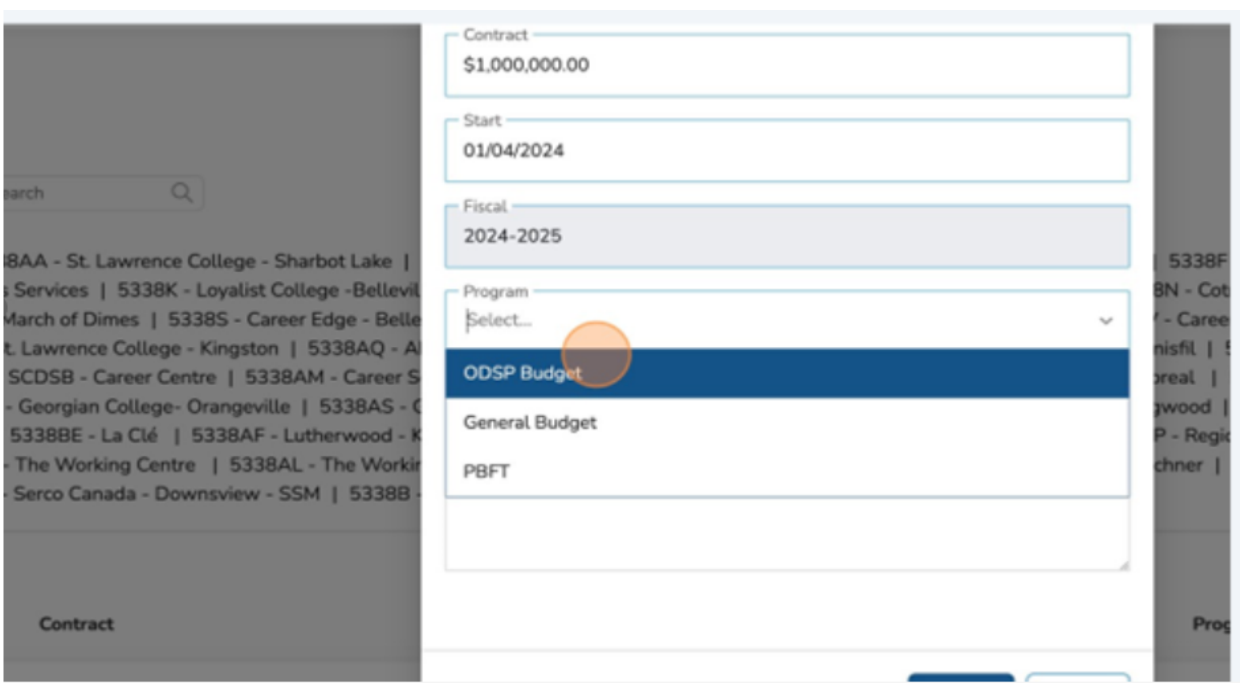
8. Select the appropriate “Start Date.”



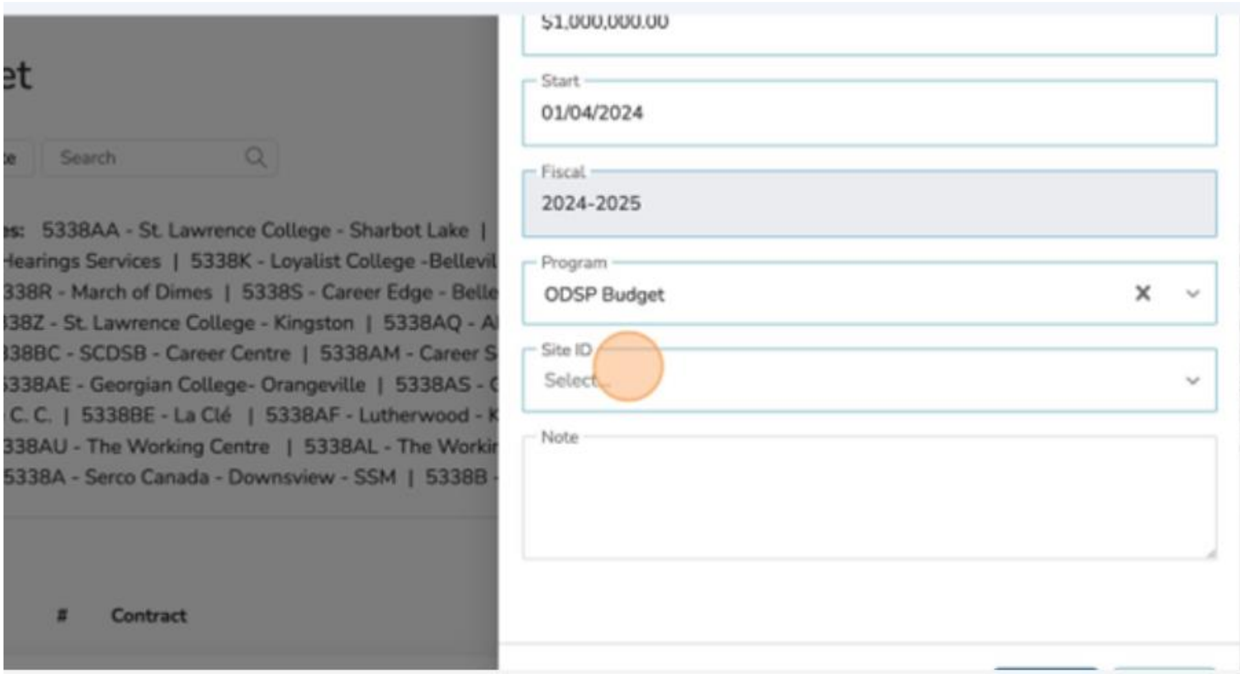
9. Select the “Program” field.



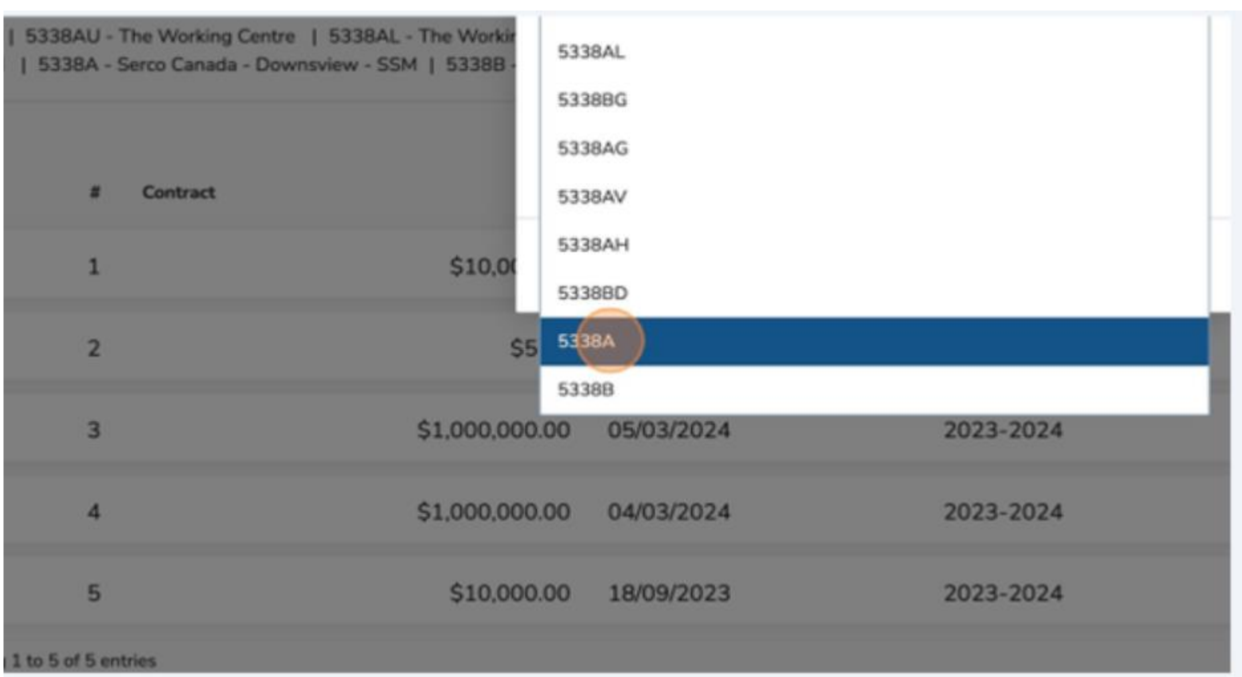
10. Select the appropriate “Budget Type.”



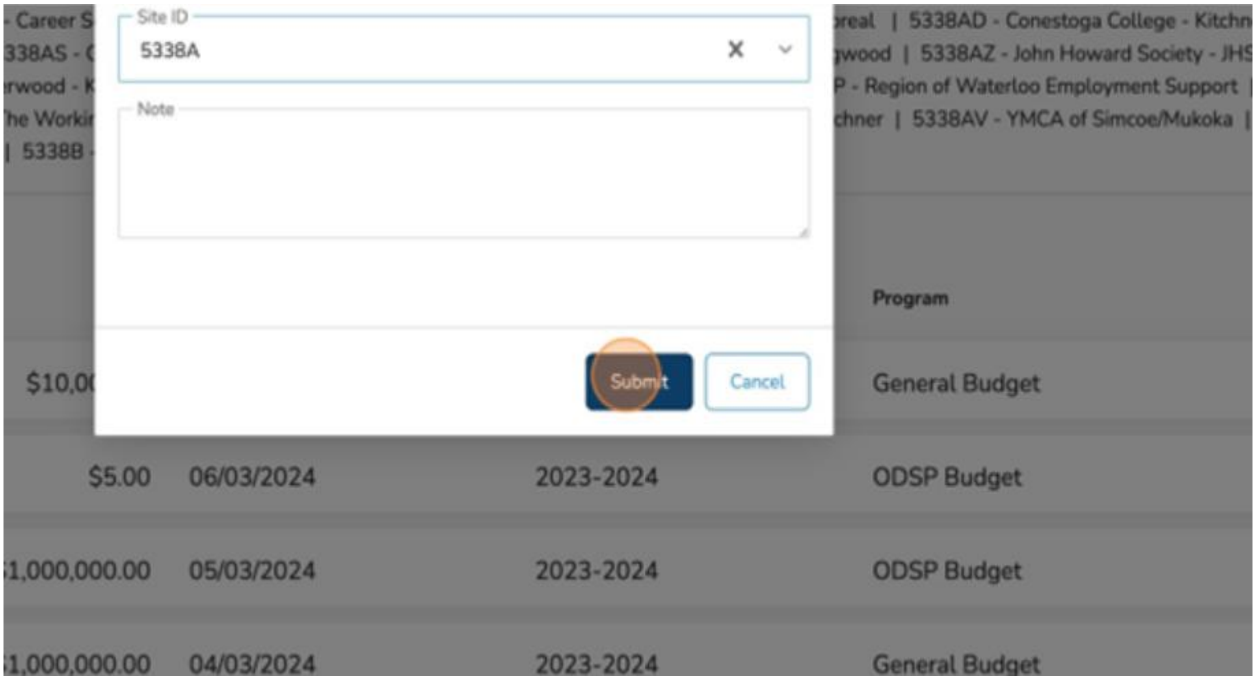
11. Click the “Site ID” field.



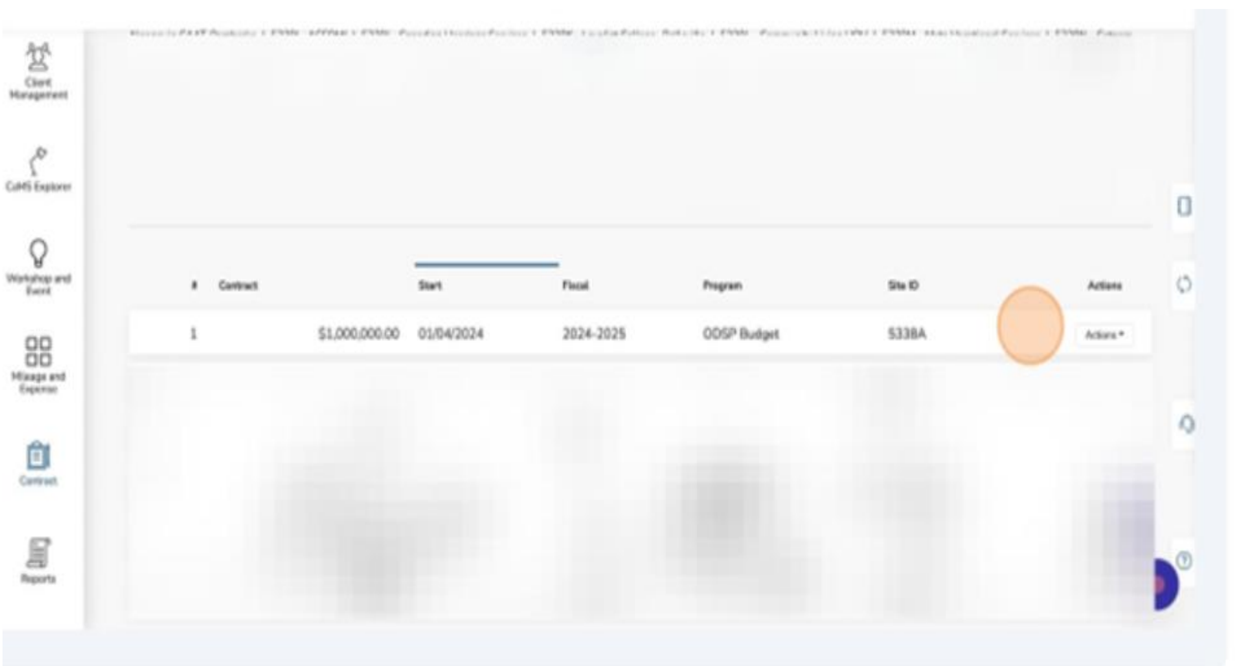
12. Select the appropriate “Site ID.”



13. Click “Submit.”



You have successfully added a New Budget.

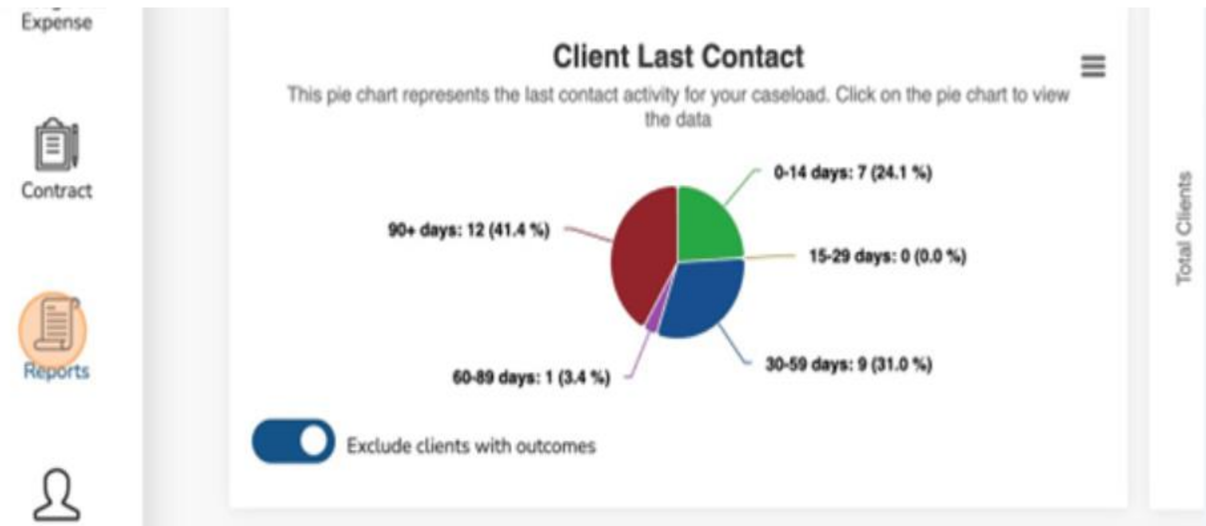


(20) Budget Tracking Report

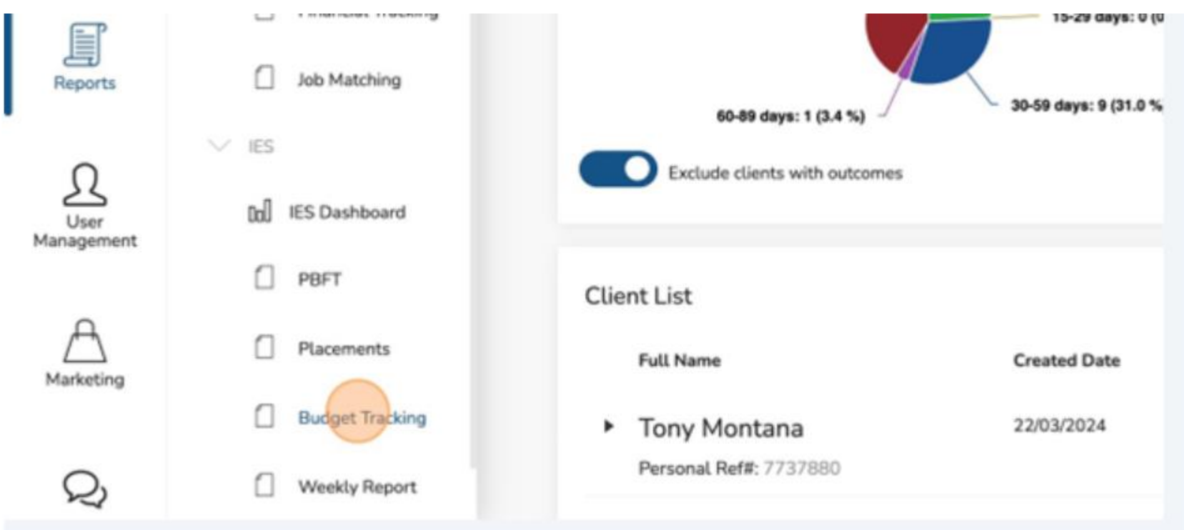
✓ The Budget Tracking Report in ESCases efficiently consolidates Client Supports and Placements into a streamlined and user-friendly summary. It offers administrators a straightforward way to handle daily financial duties and maintain focus on broader financial goals.

1. Click on the three lines at the top left-hand corner.

2. Click "Reports."

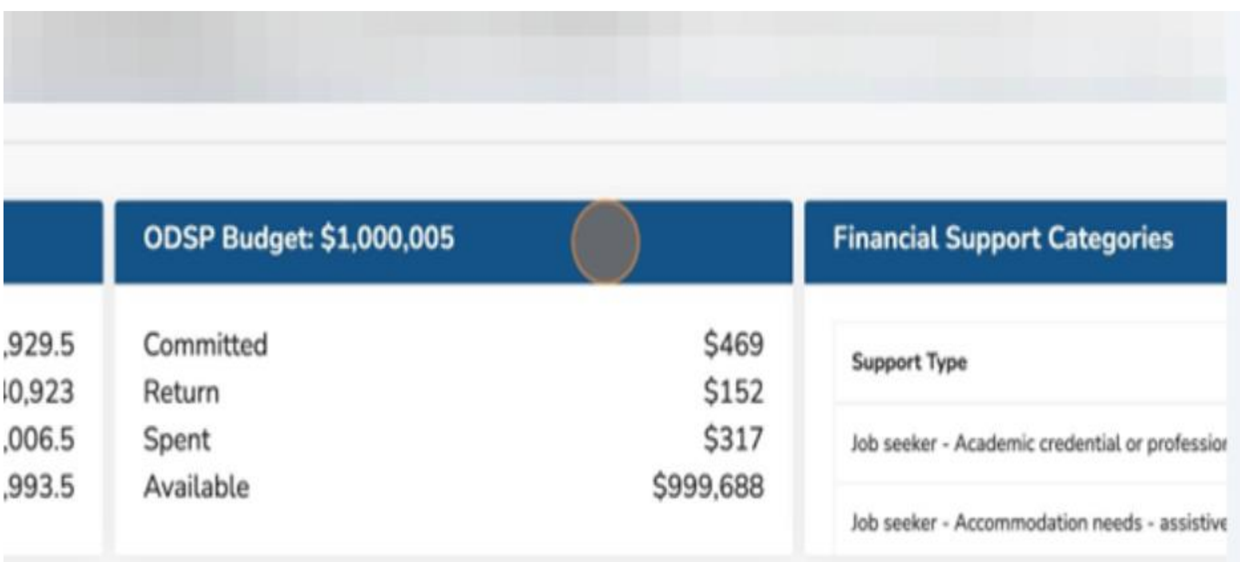


3. Click "Budget Tracking."



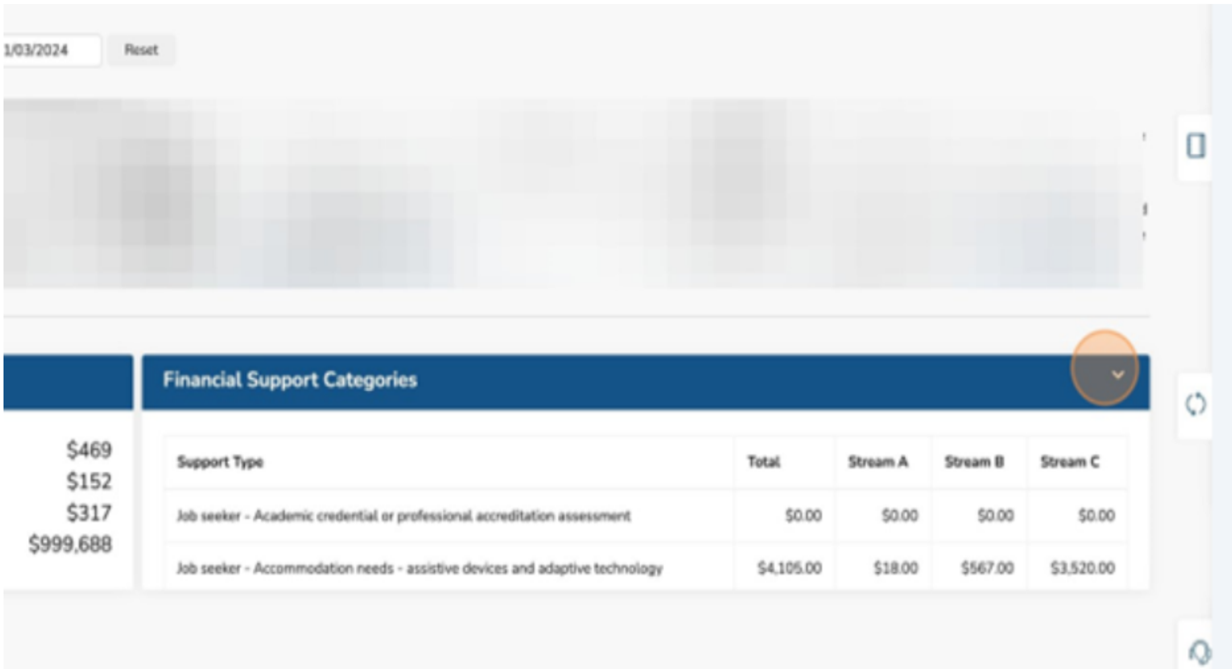
The “General Budget” displays totals for Committed, Return, Spend, and available funds based on the Client Support submissions.

The “ODSP Budget” displays totals for Committed, Return, Spent and Available funds based on the Client Support submissions.

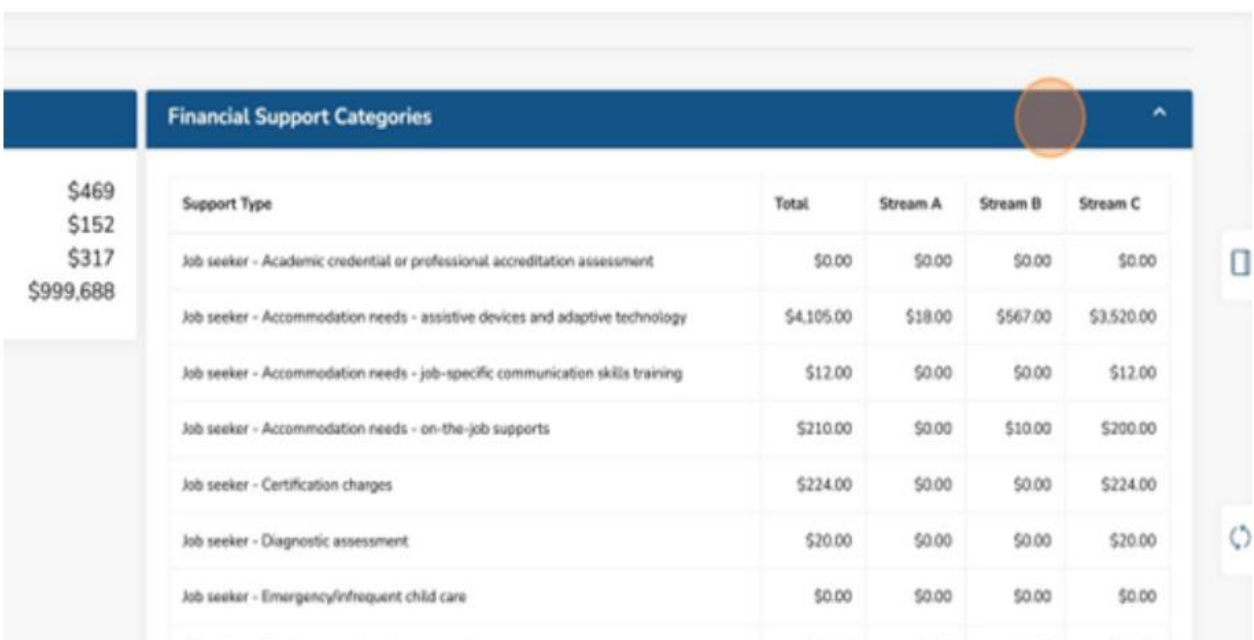


✓ Budget calculations are based on "Approved" & "Completed" statuses, only.

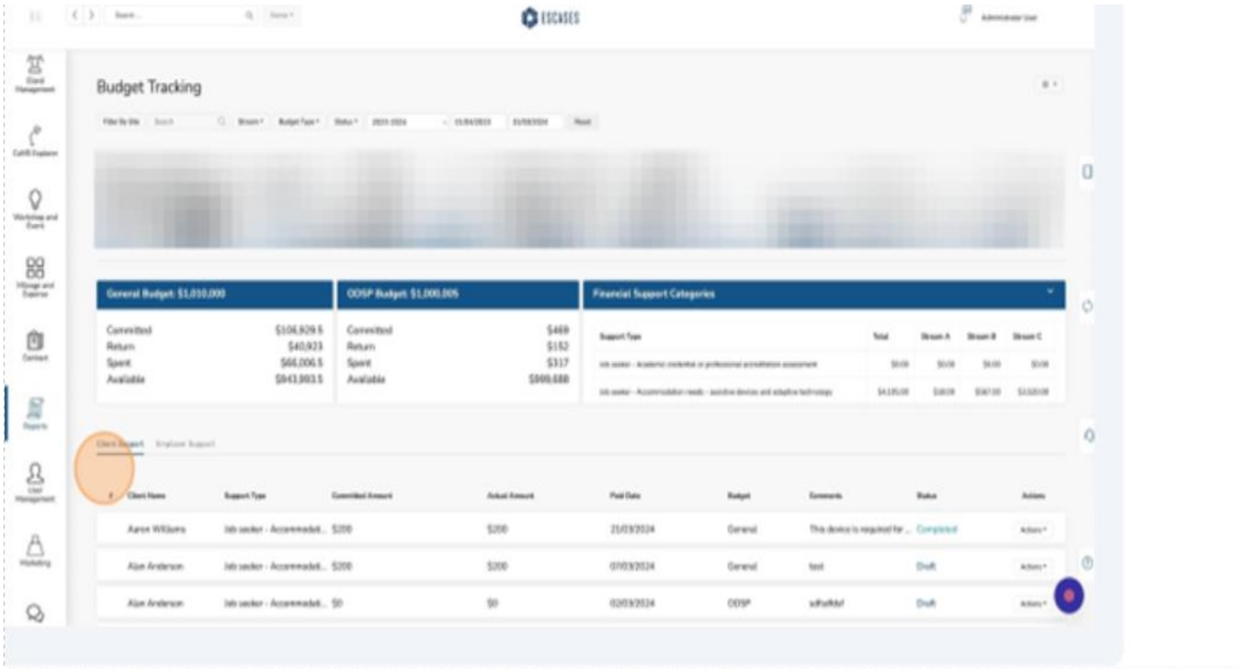
4. Click the chevron to expand the “Financial Support Categories” view.



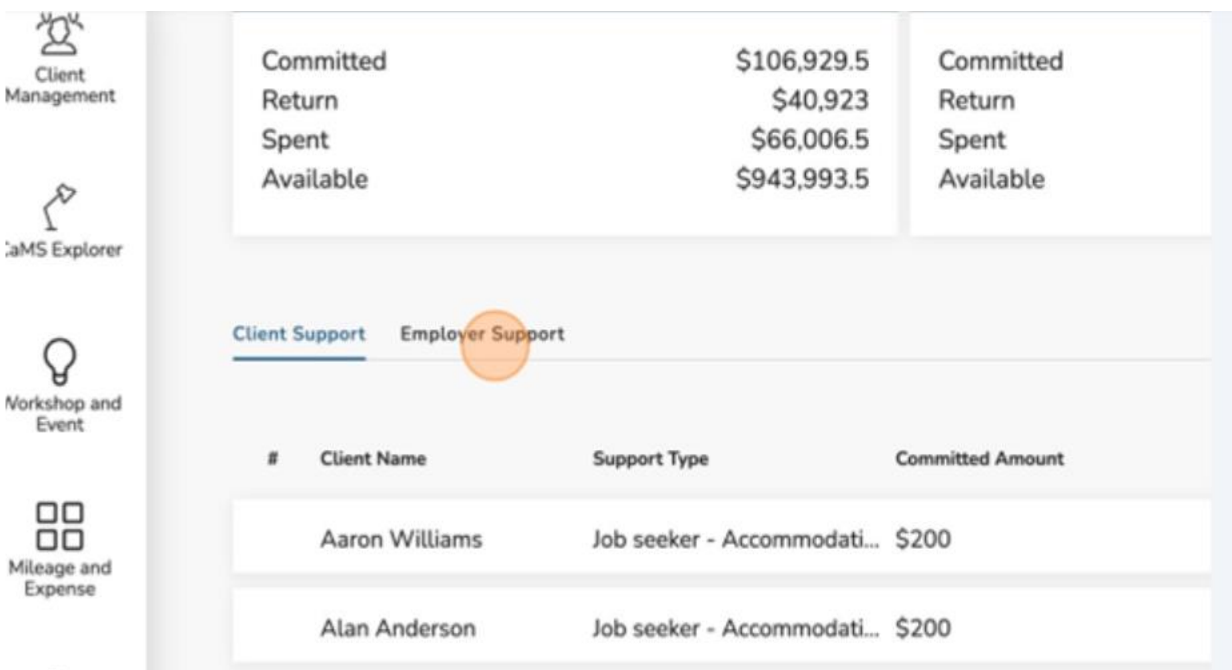
A full view of all Client Support Categories will be displayed.



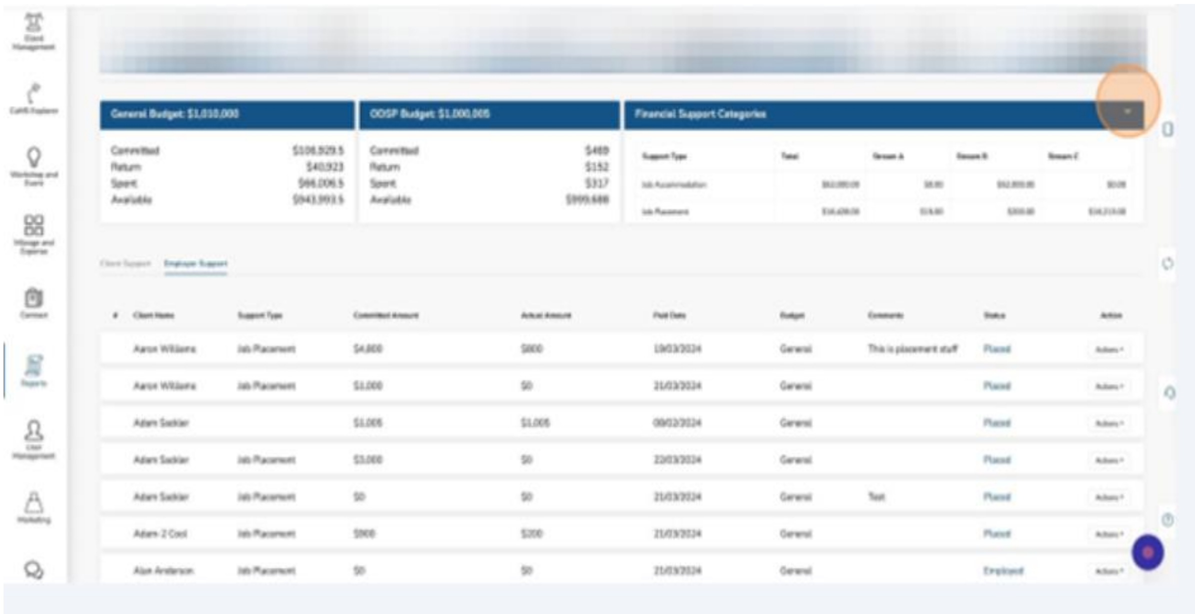
The Client Support list shows all Client supports currently in your organization inclusive of all statuses (Draft, Submit, Approved, Completed, Closed).



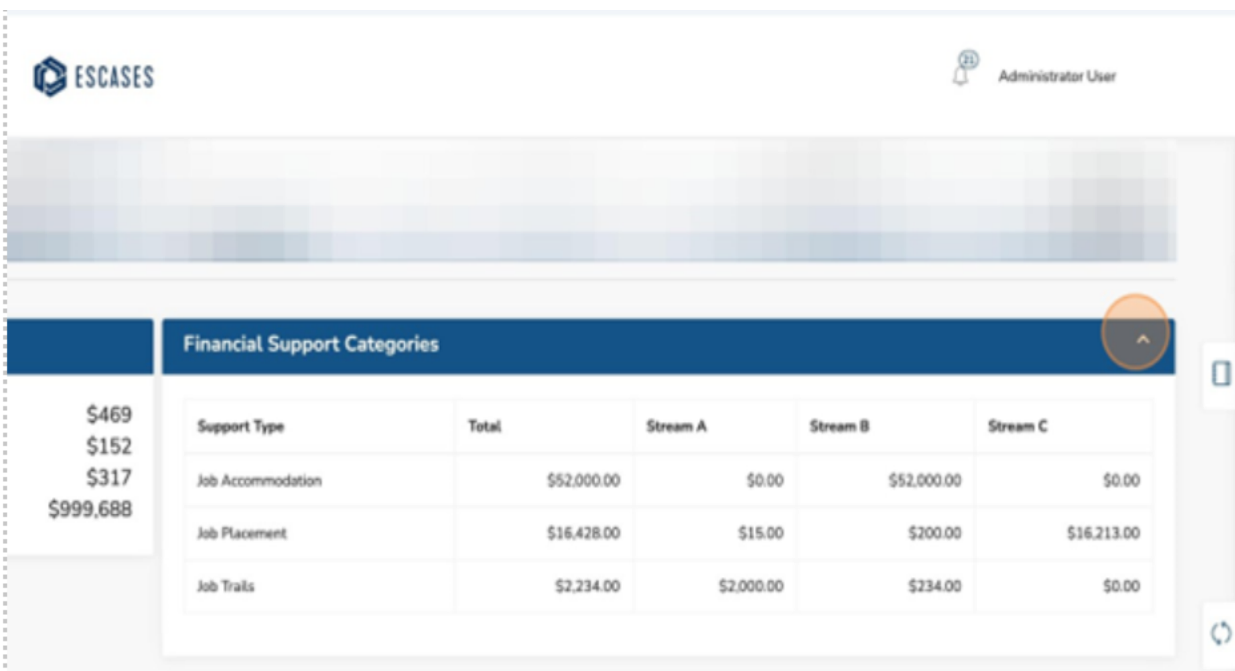
5. Click “Employer Support” to change the displayed items to “Employer Supports.”



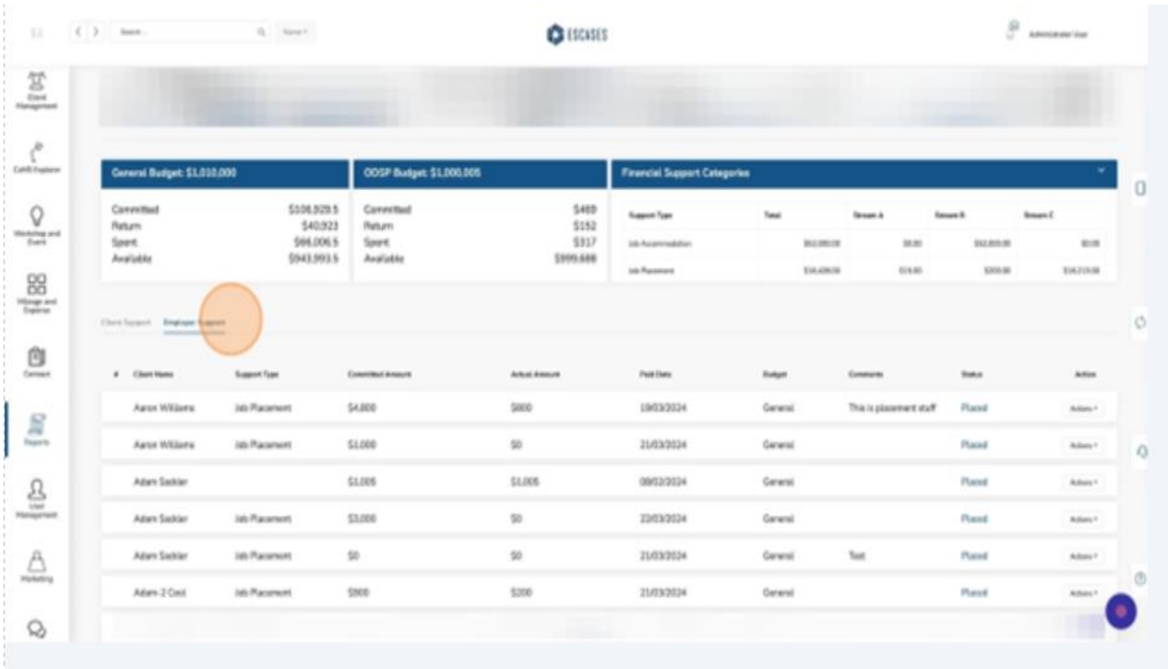
6. Click the chevron to expand the “Financial Support Categories” view.



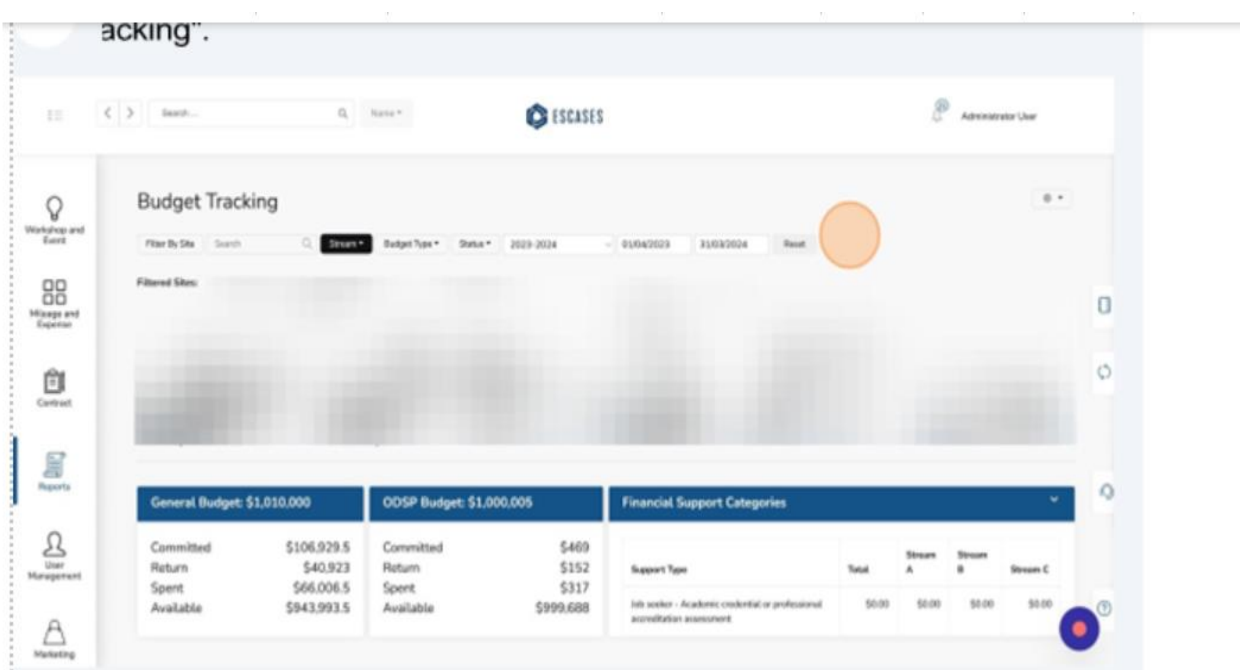
A full view of all Placement items will be displayed.



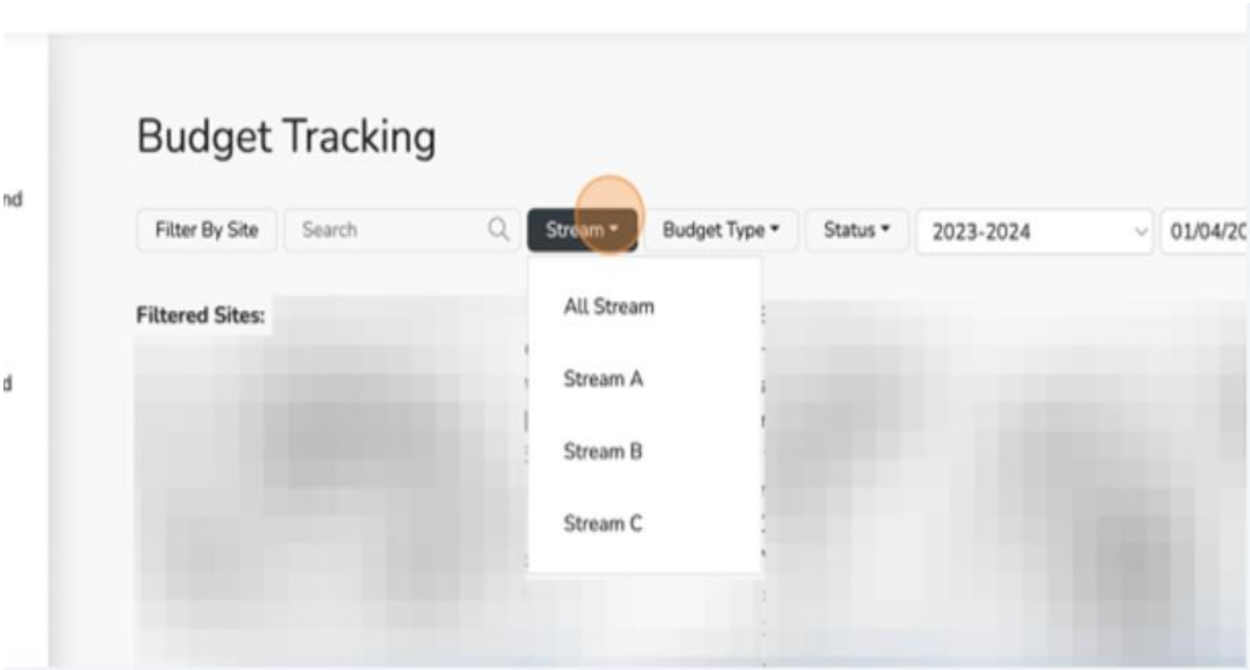
The Placement List shows all placements currently in your organization inclusive of all statuses (Placed, Quit, Active, Hold).



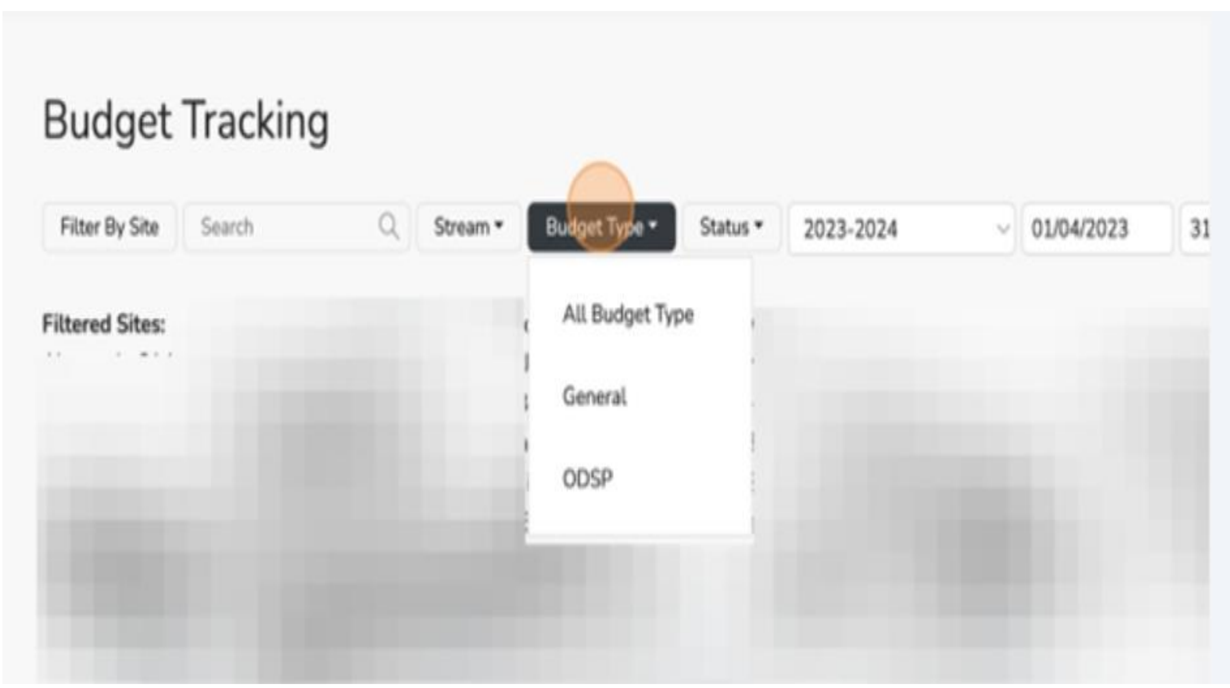
“Filter” can be found at the top of the page underneath the heading “Budget Tracking.”



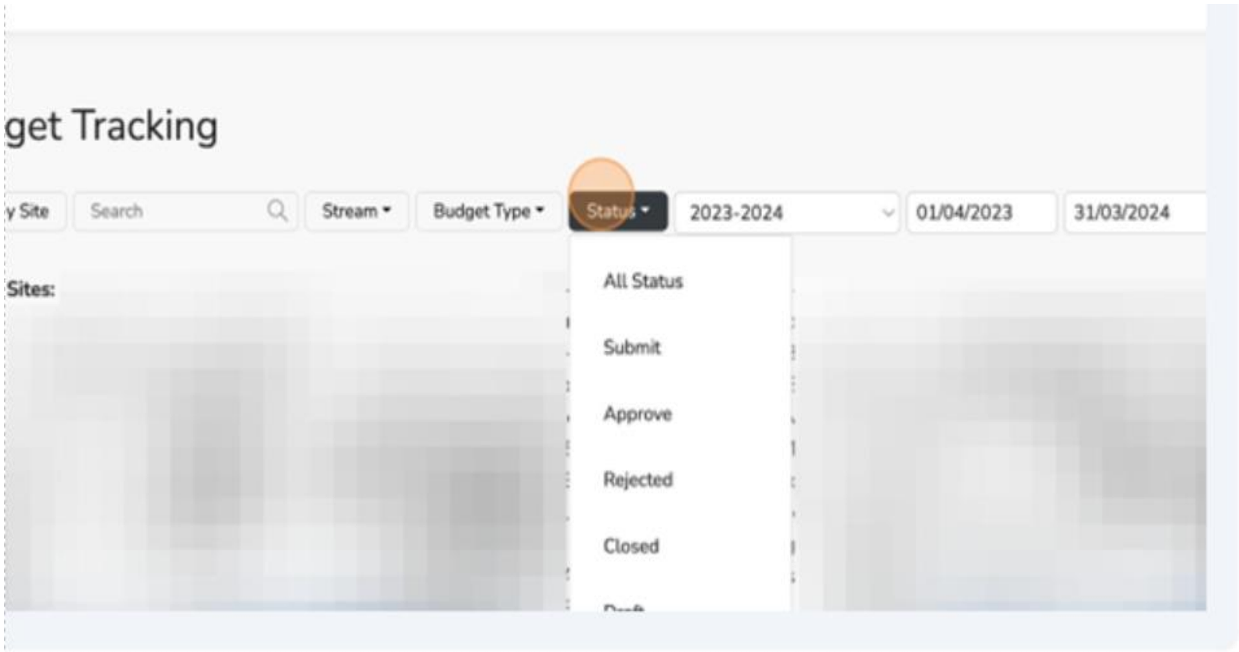
7. Click the “Stream” field to filter by stream.



8. Click “Budget Type” to filter by “Budget Type.”

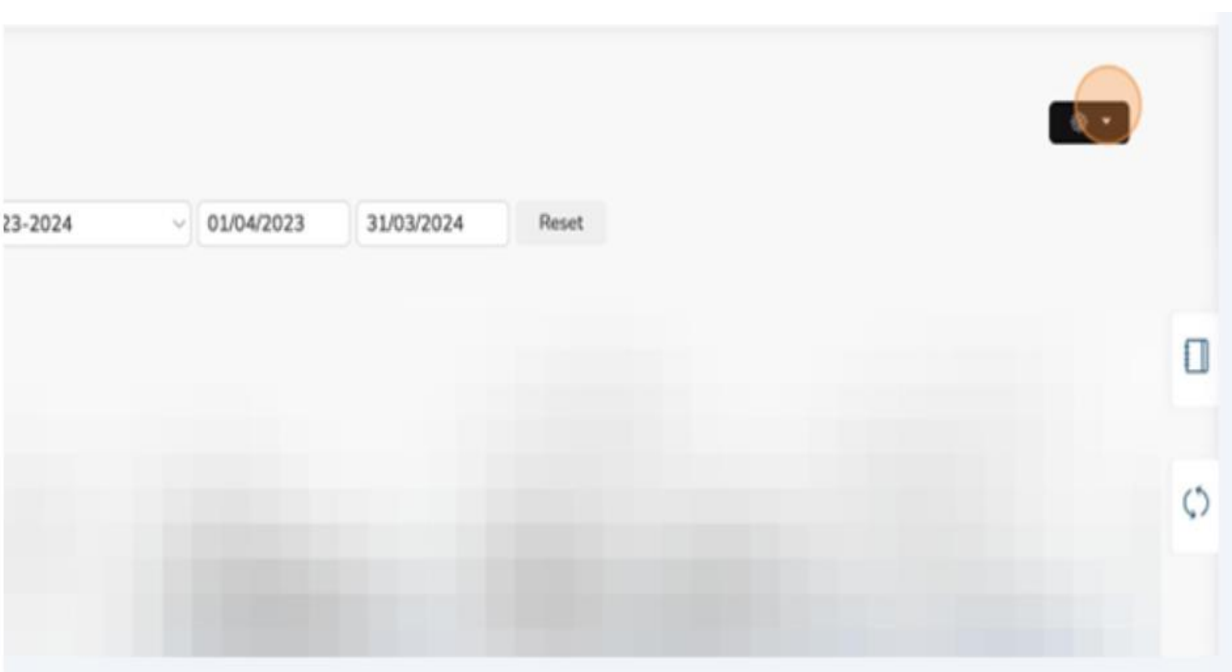


9. Click on “Status” to filter by “Status.”

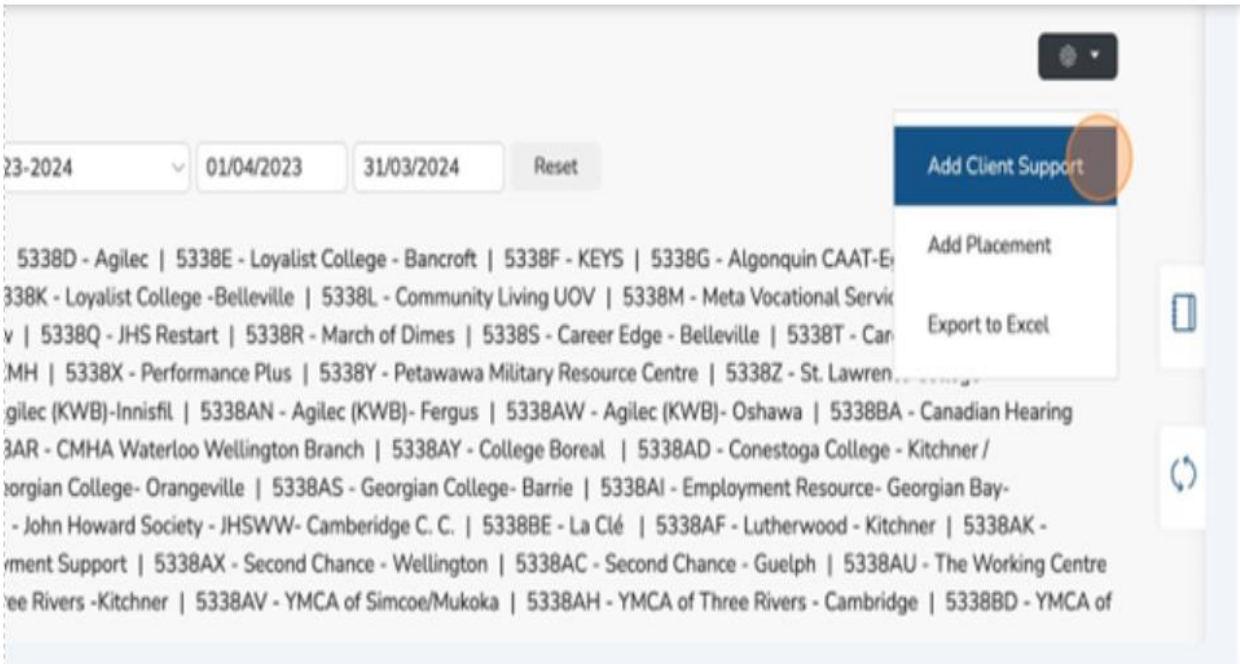


✓ You can also generate a Client Support or Placement by clicking the gear icon from the top right of the report.

10. Click the “Gear” icon.



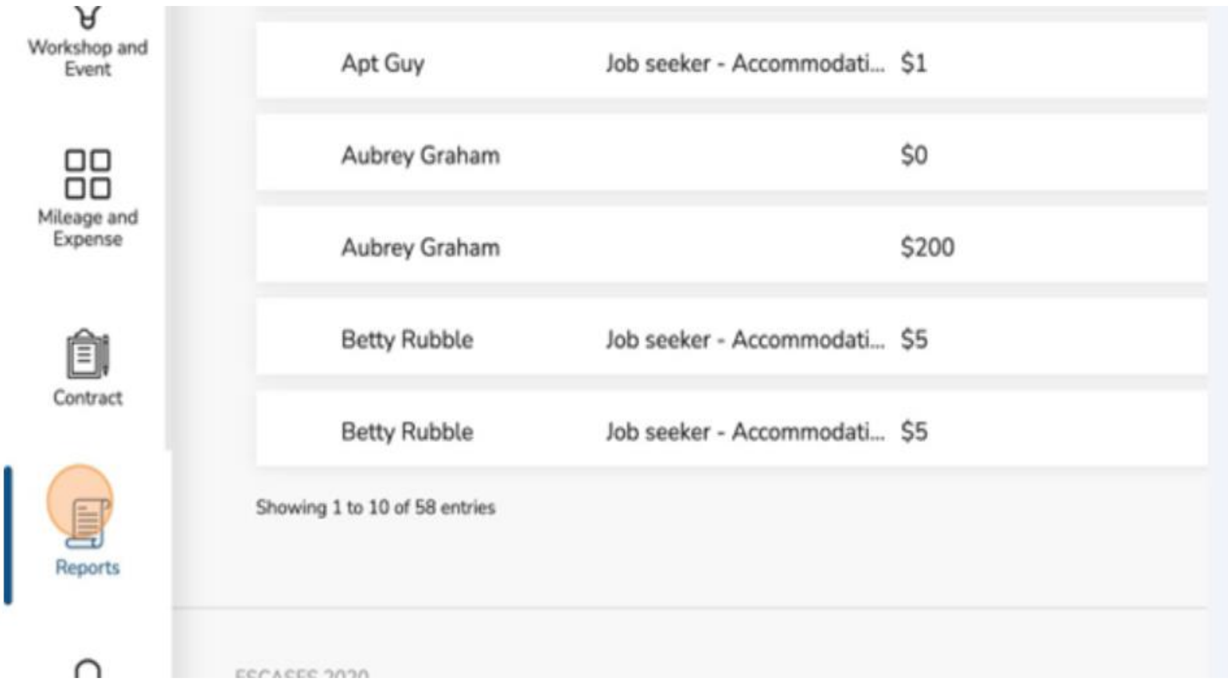
You can select to Add a “Client Support” or a “Placement” as well as Export the support to Excel.



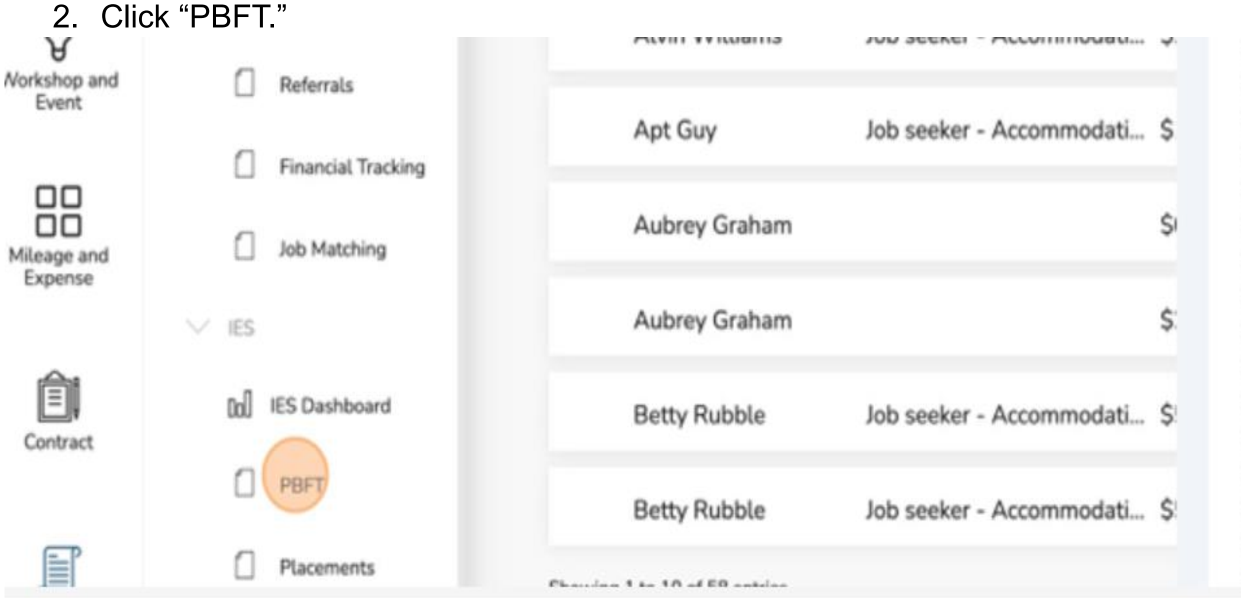
(21) Performance Based Funding (PBFT Report)

✓ The Performance Based Funding Tracking report brings together the oversight and summarization of Checkpoints, enabling administrators to record expected revenues from the SSM in alignment with a predetermined fee structure.

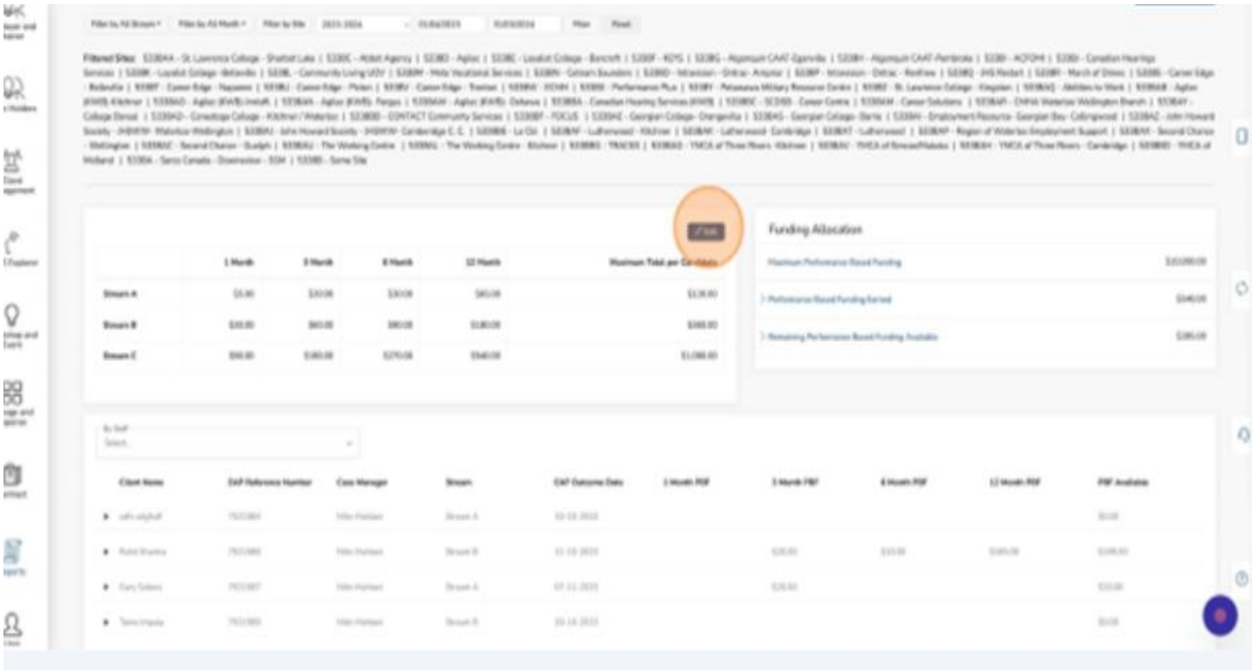
1. Click “Reports.”



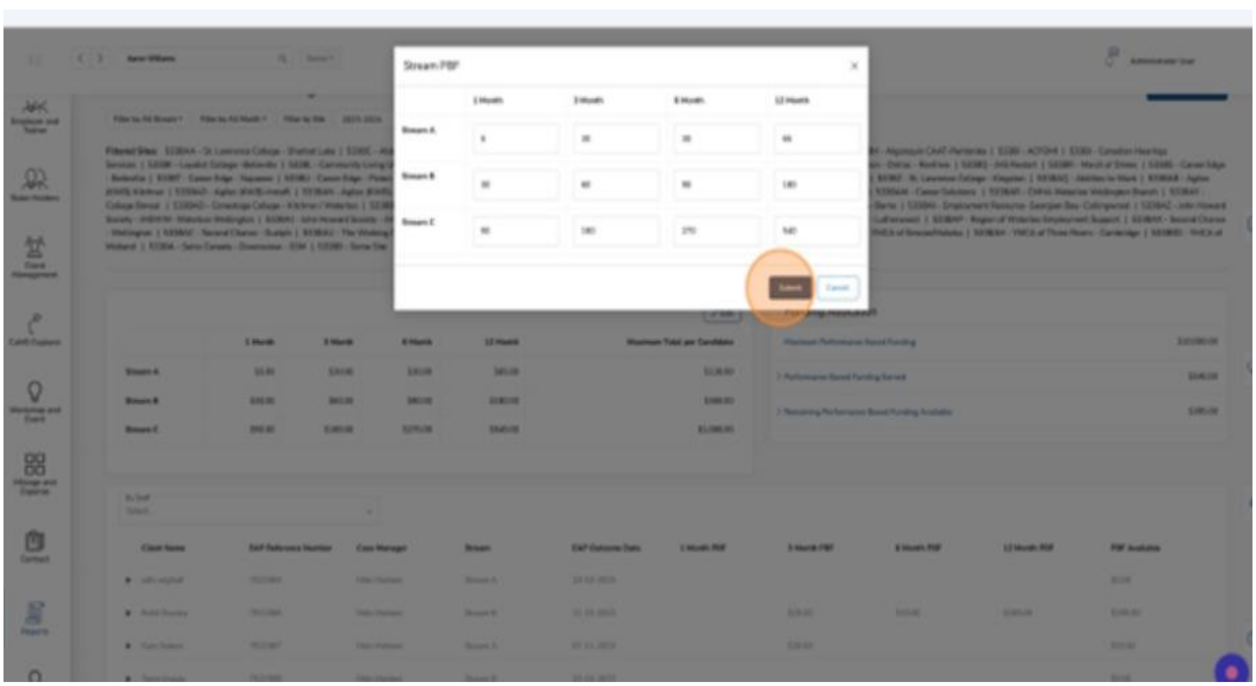
2. Click “PBFT.”



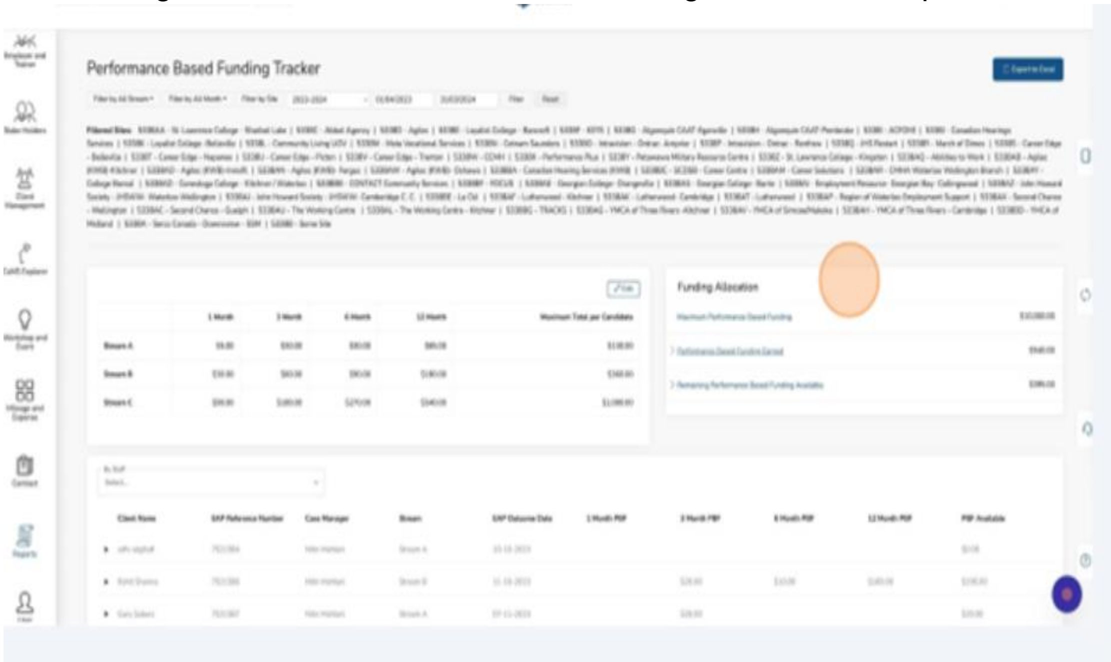
3. Click “Edit” to edit the fee structure of PBF.



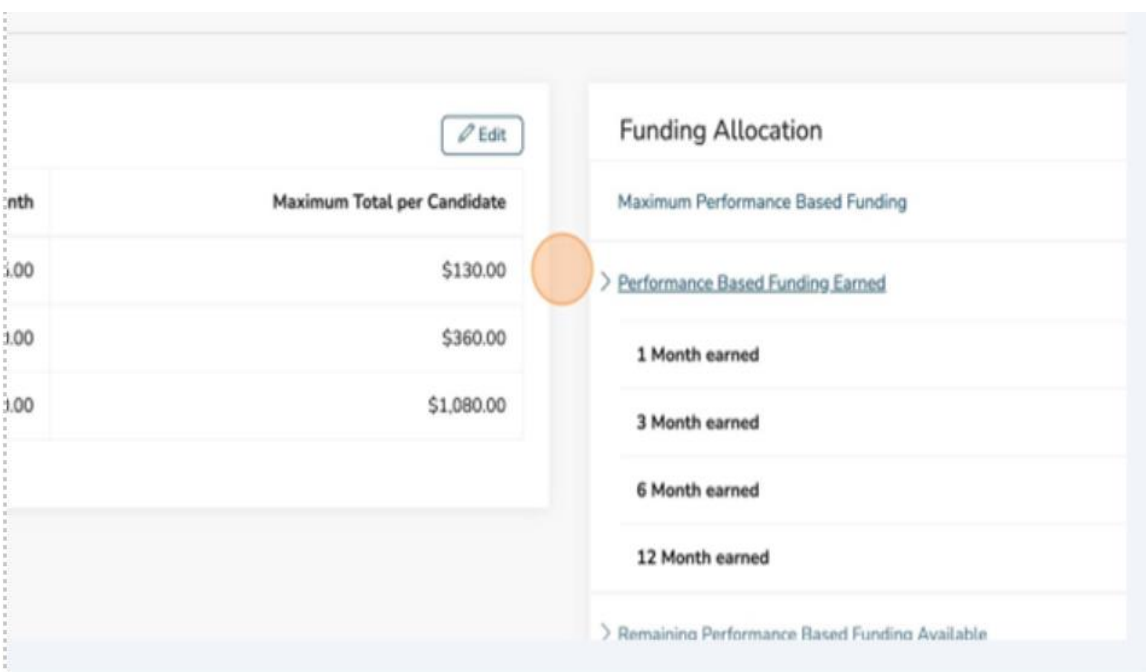
4. Input the value for each stream for each checkpoint and select “Submit.”



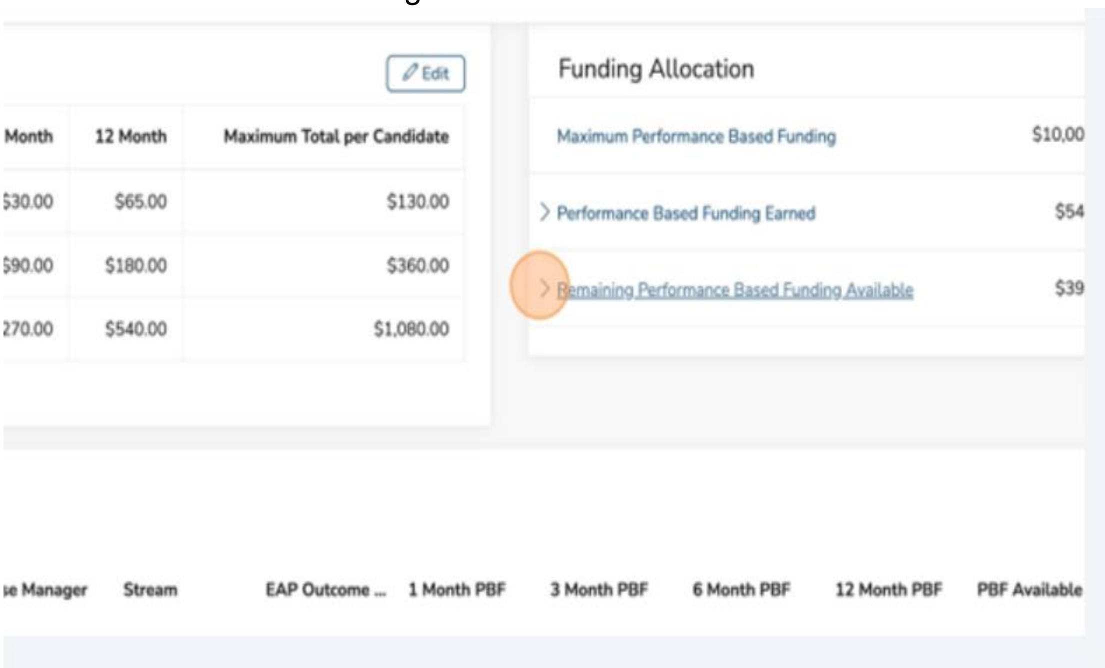
The funding allocation can be viewed from the right side of the report.



Performance Based Funding Earned is the total amount of PBF collected.

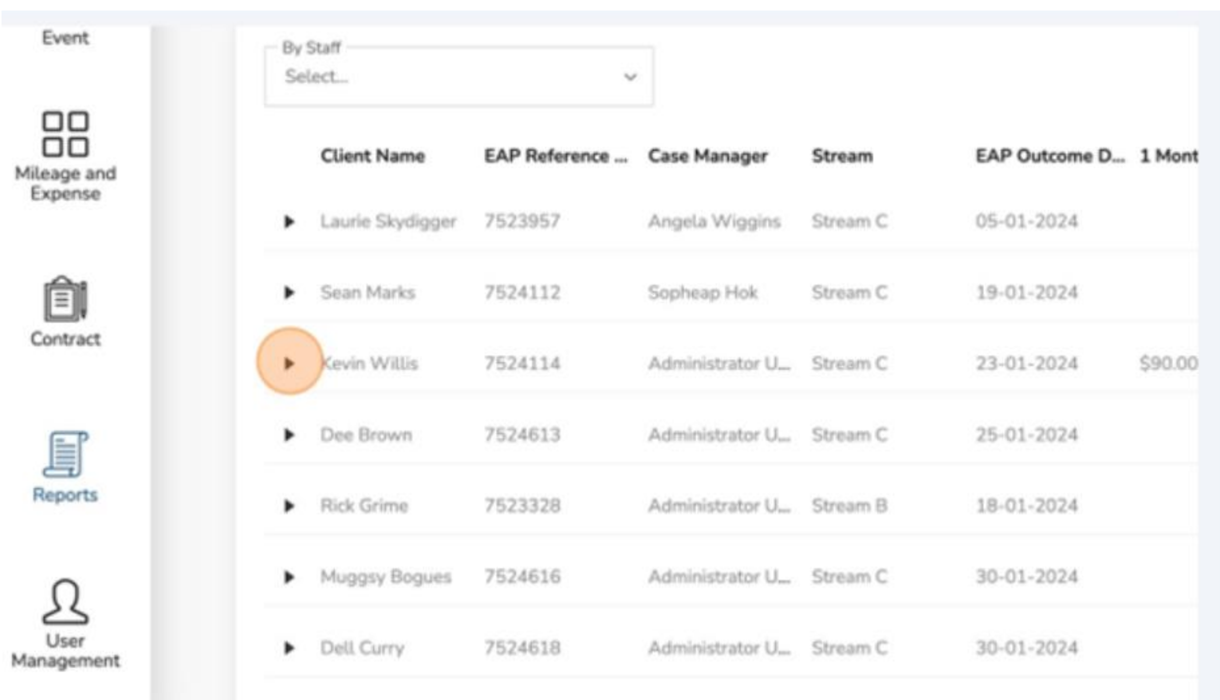


The remaining Performance Based Funding Available is the remaining balance between PBF collected and PBF outstanding.

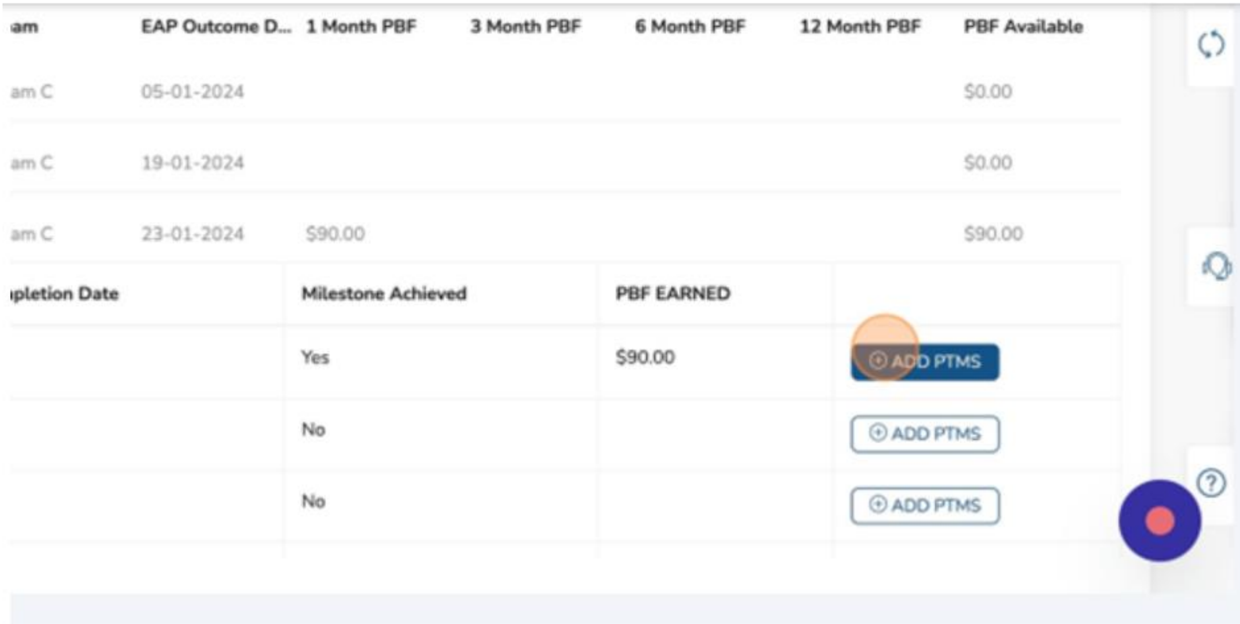


Updating Payments

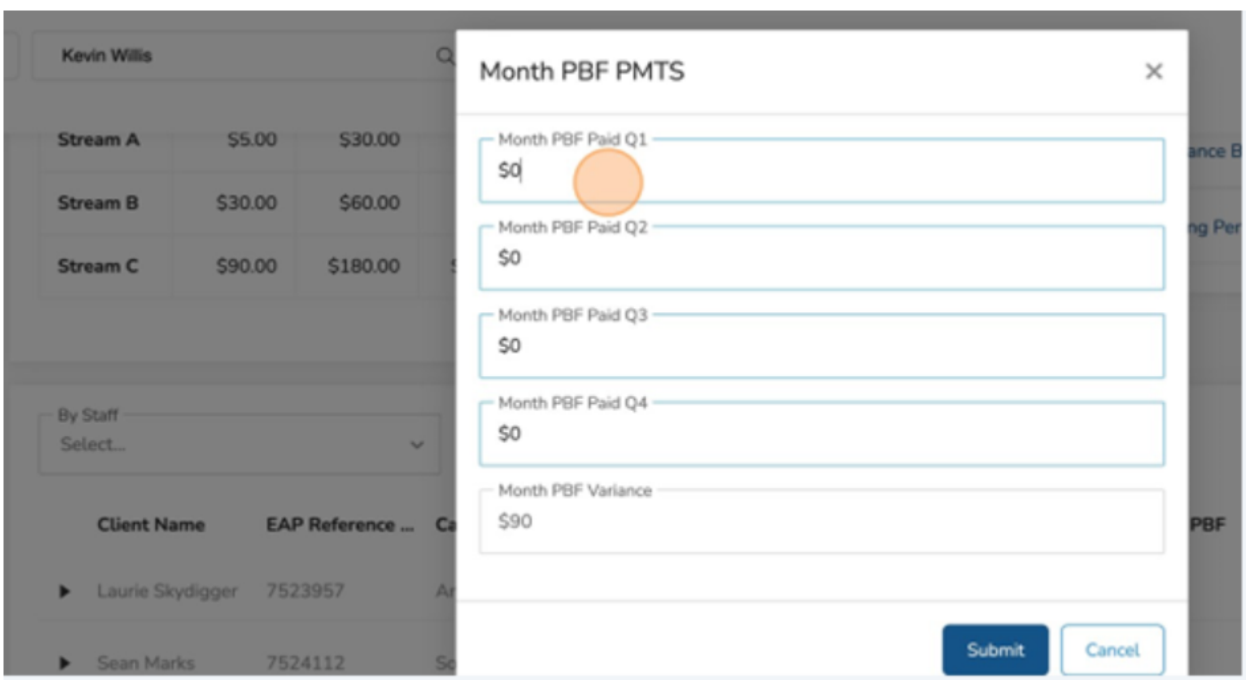
1. Locate the client you would like to update and expand the chevron to view the details.



2. Click “Add PTMS.”

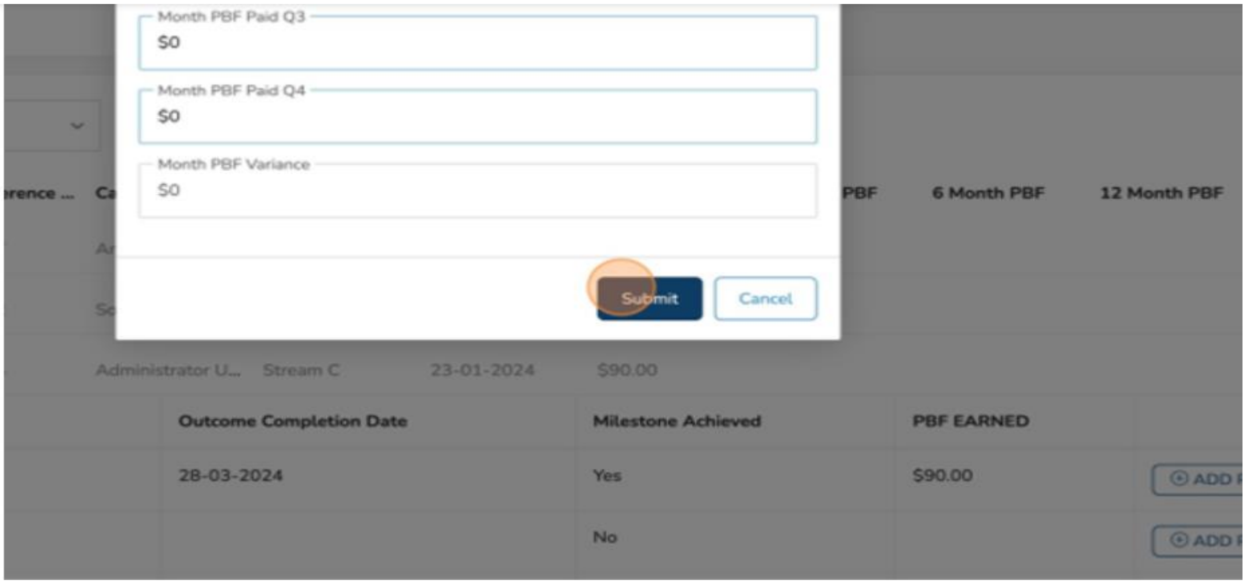


3. Click the appropriate quarter when the payment was received.

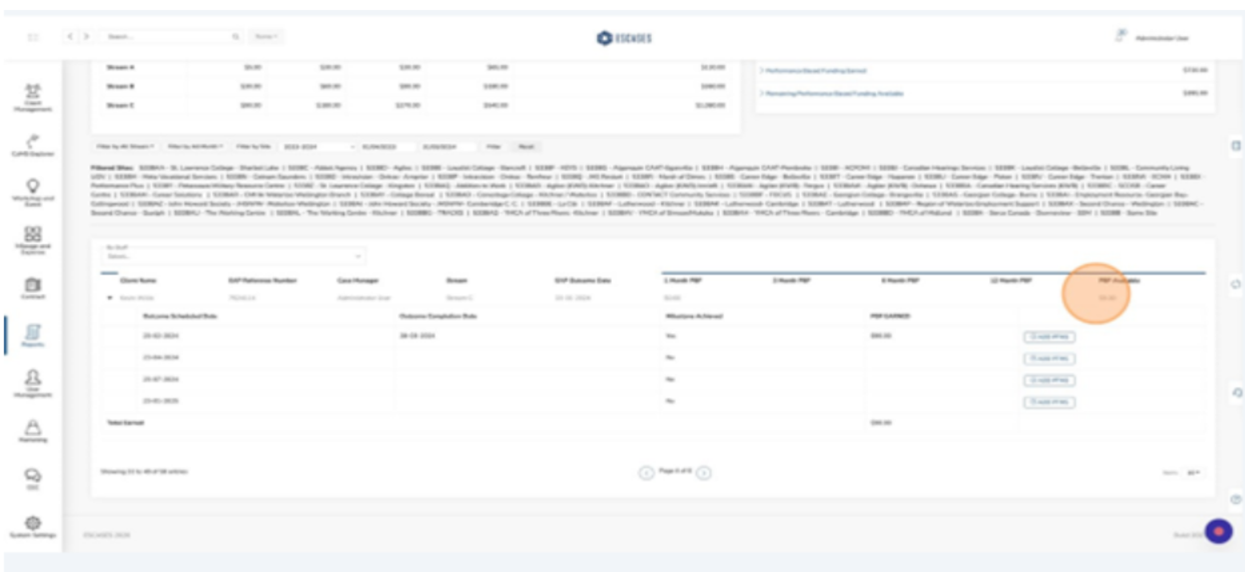


4. Enter the appropriate amount received.

5. Click “Submit.”



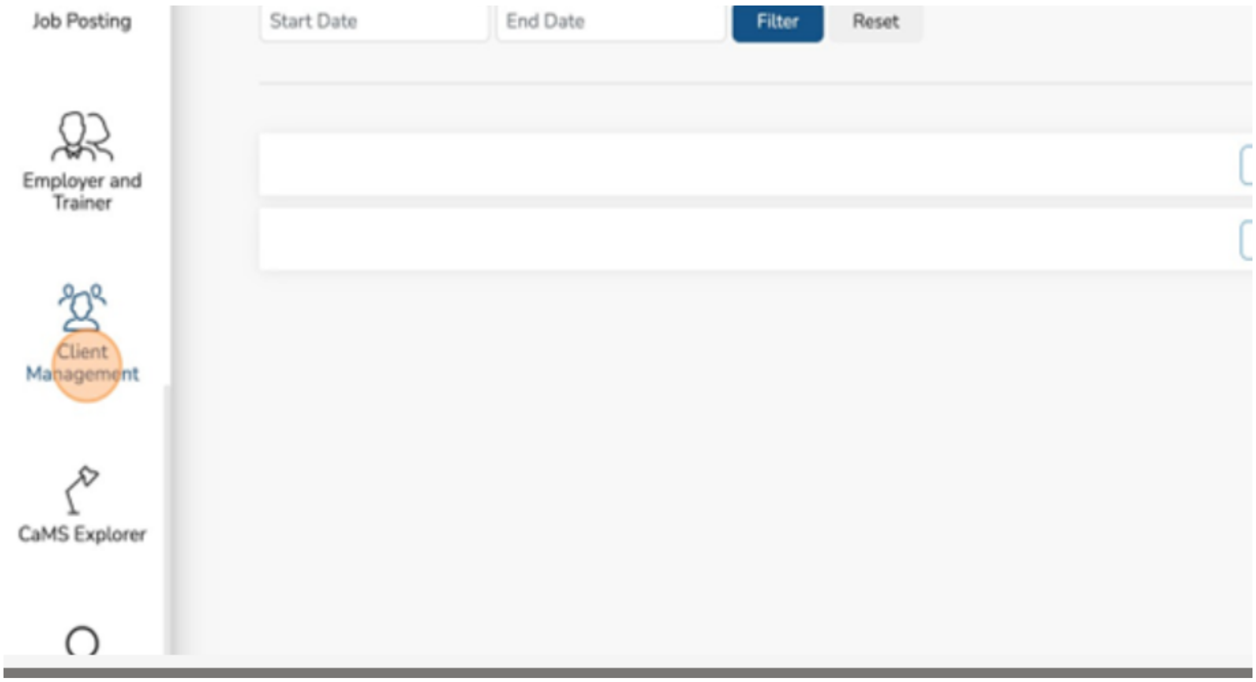
You have successfully updated the payment for PBF.



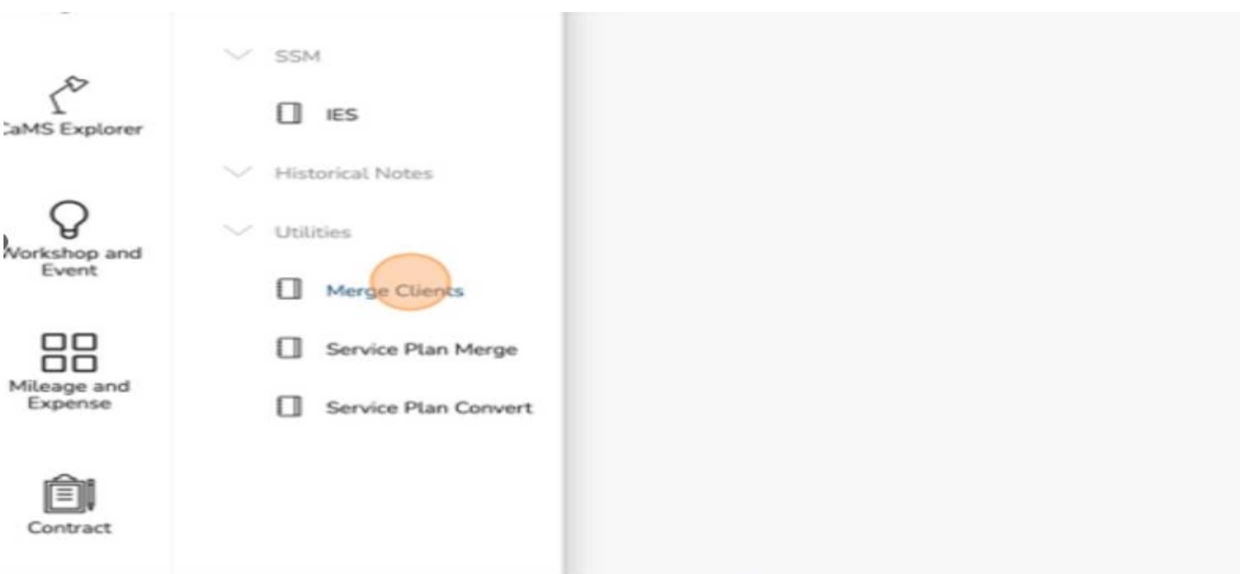
(25) Admin Tools - Merging Client Profiles

➢ **Alert!!! Merging cannot be undone. Use with extreme caution.**

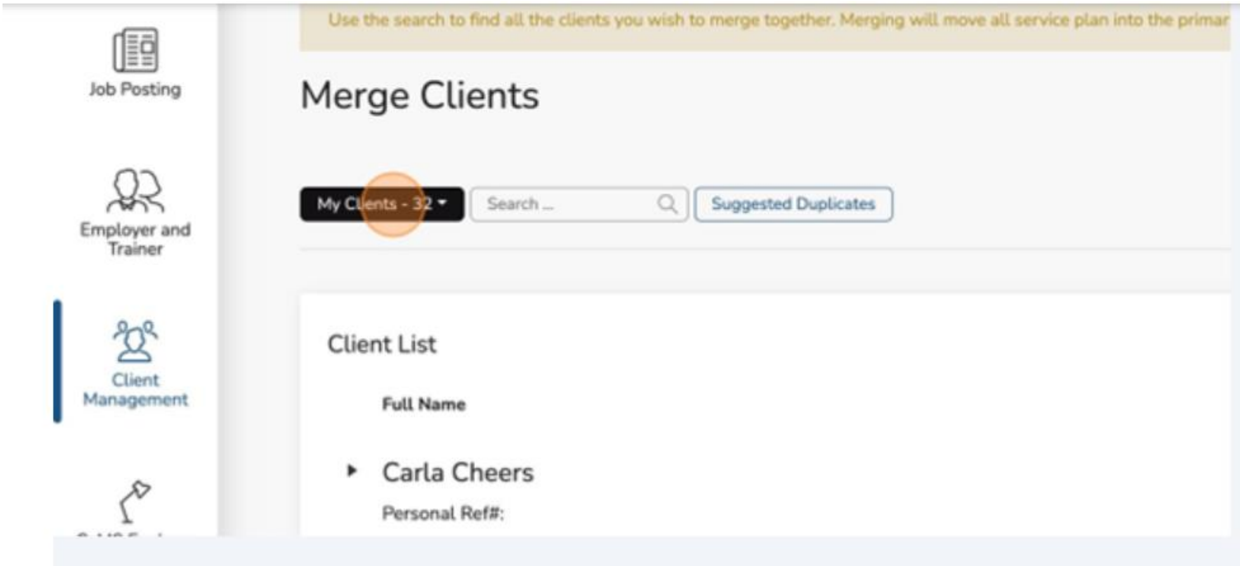
1. Click “Client Management.”



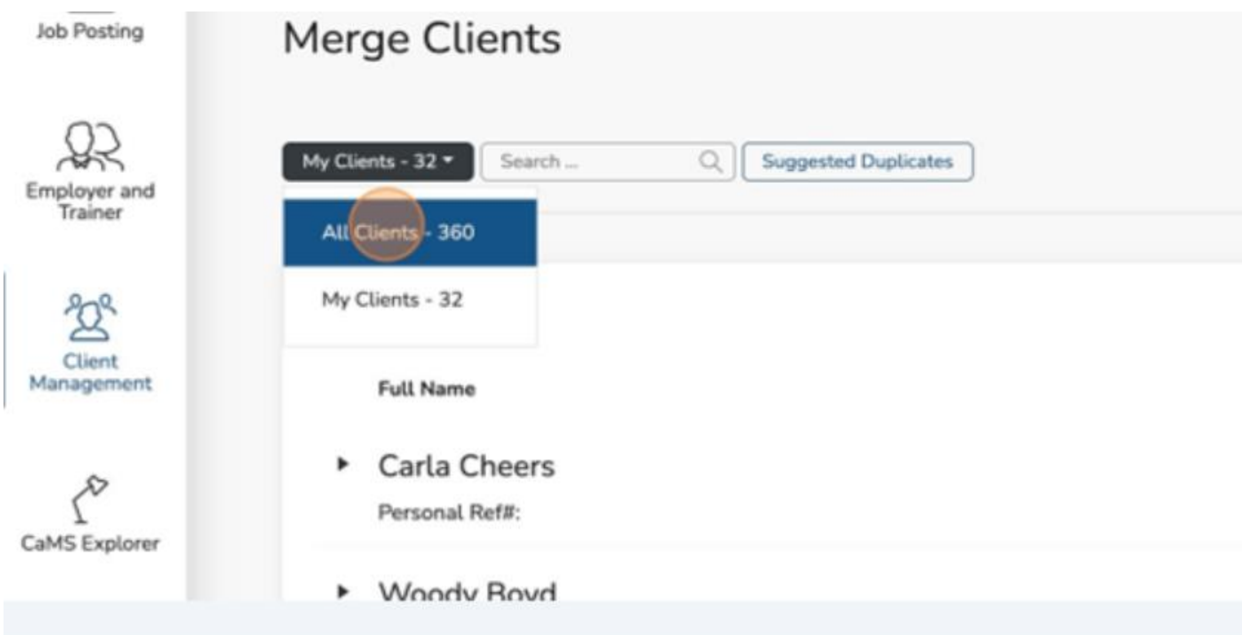
2. Click “Merge Clients.”



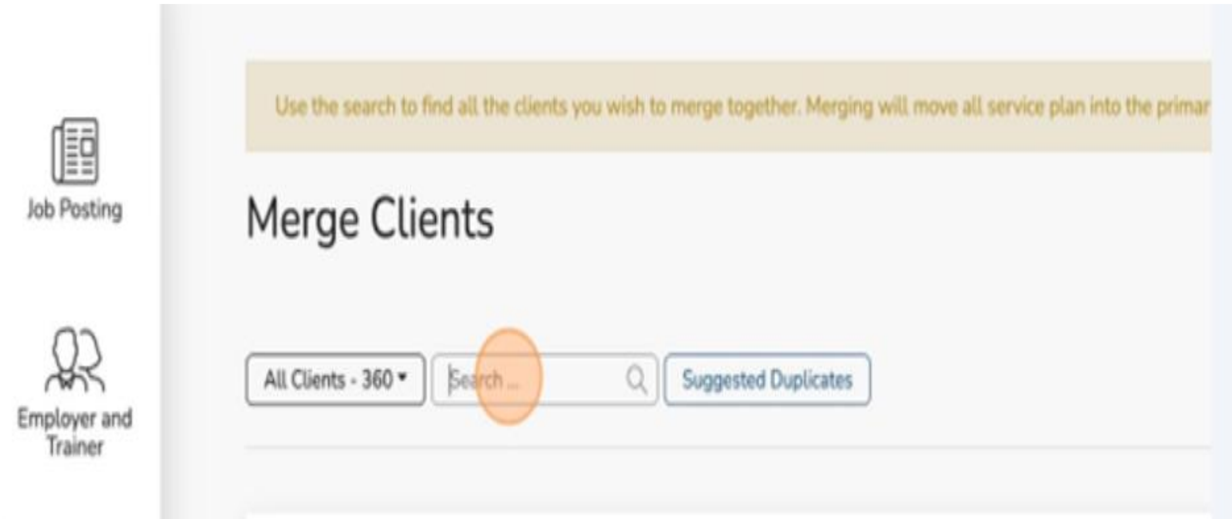
3. Click “My Clients.”



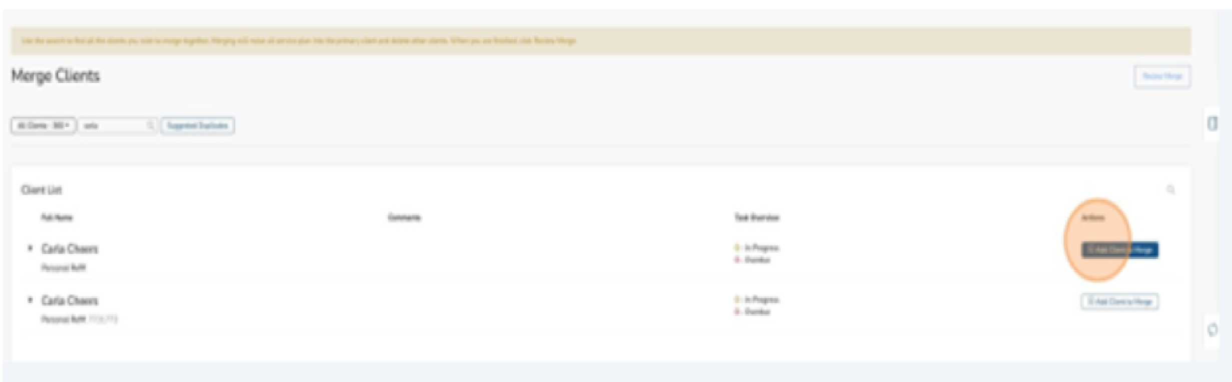
4. Click “All Client.”



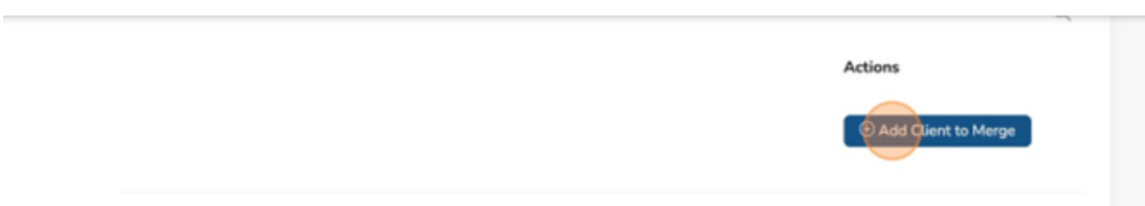
5. Click the “Search” field.



6. Enter the client Name.
7. Locate the client profile you want to add to the merge.
8. Click “Add client to the merge.”



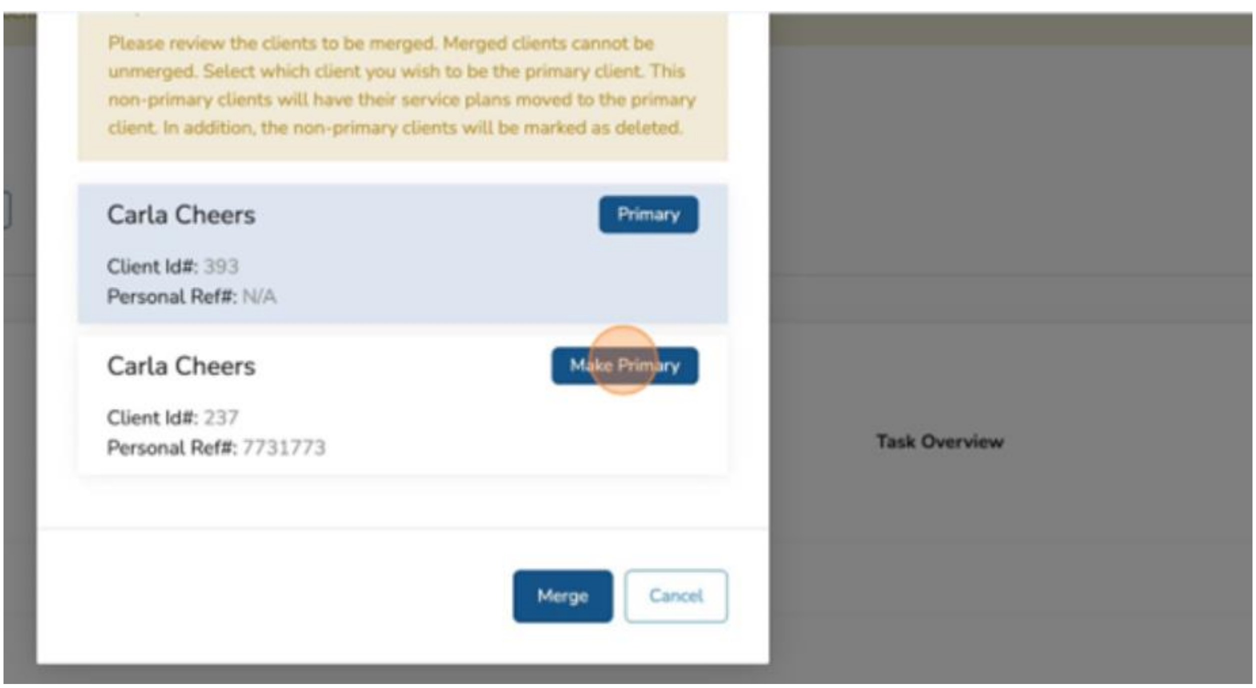
9. Locate the other client profile you want to add to the merge.
10. Click “Add client to the Merge.”



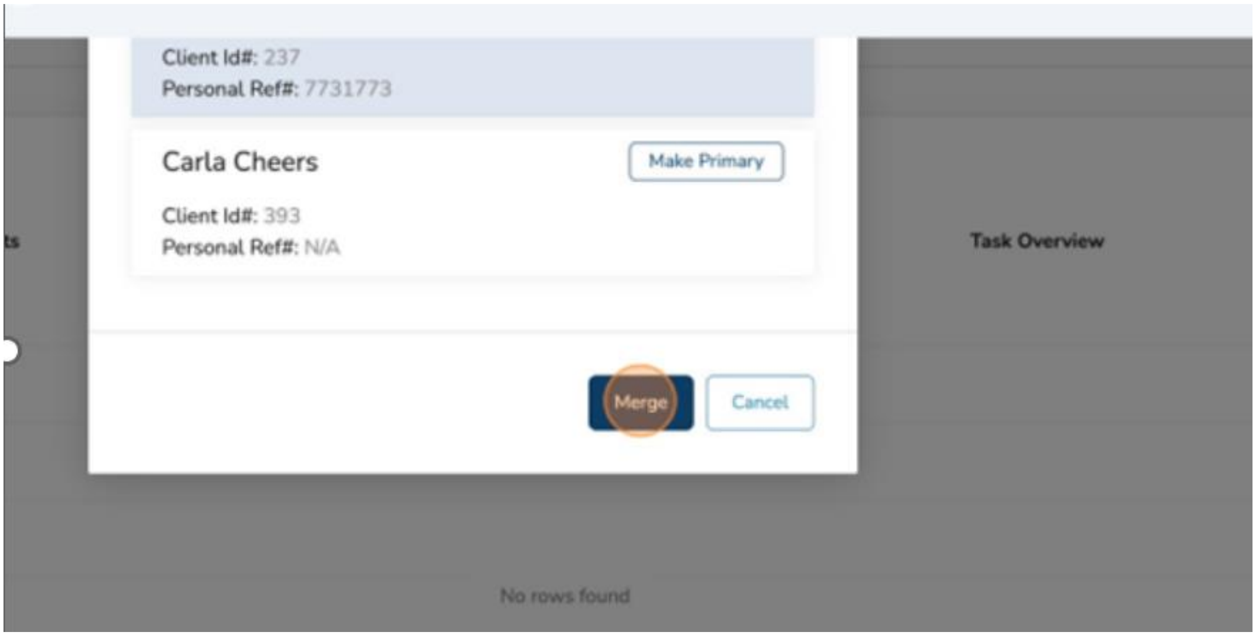
11. Click “Review Merge.”

➢ Alert! Ensure you identify the appropriate profile as the “Primary” profile. Choosing the "Primary" profile will set this client as the main profile moving forward. All other profiles involved in this merge will be consolidated into the primary profile.

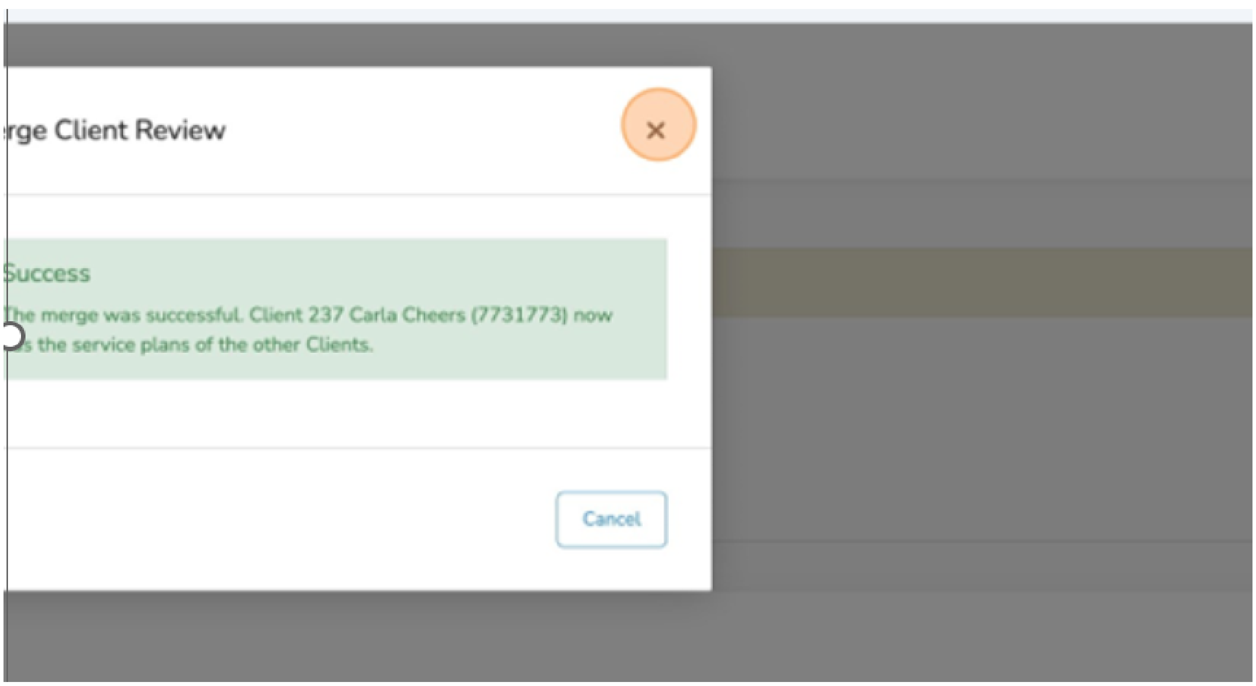
12. Click “Make Primary.”



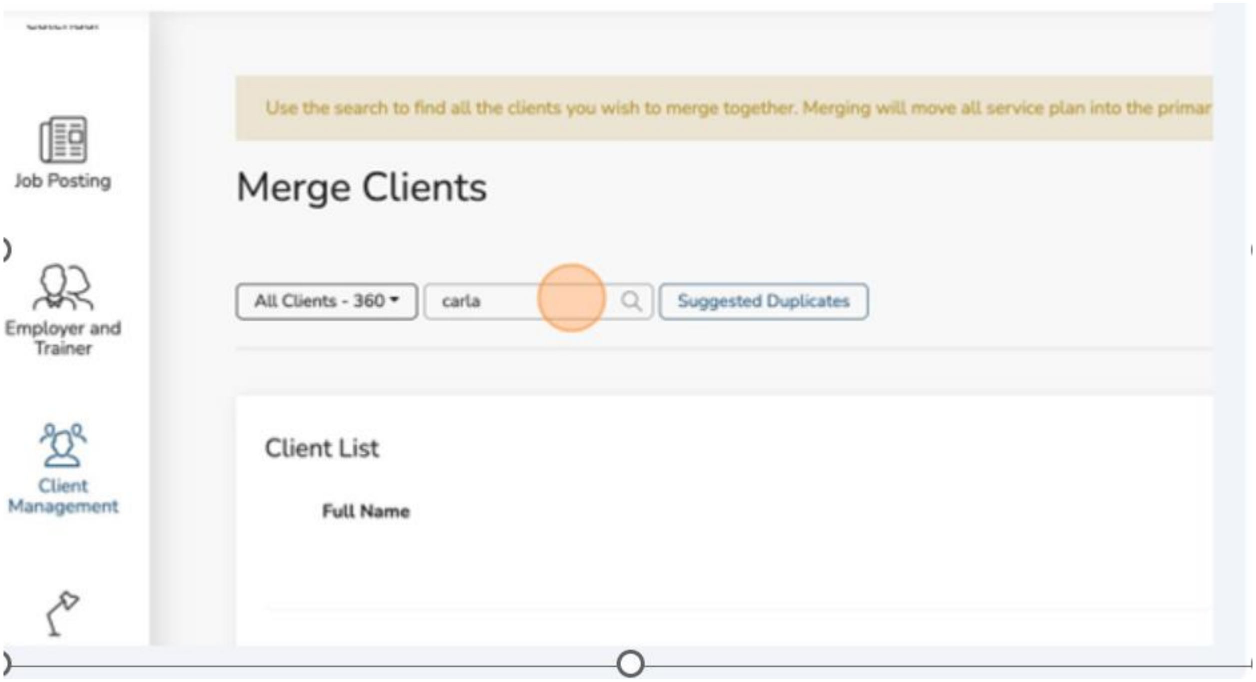
13. Click “Merge.”



14. Click “X” to close.

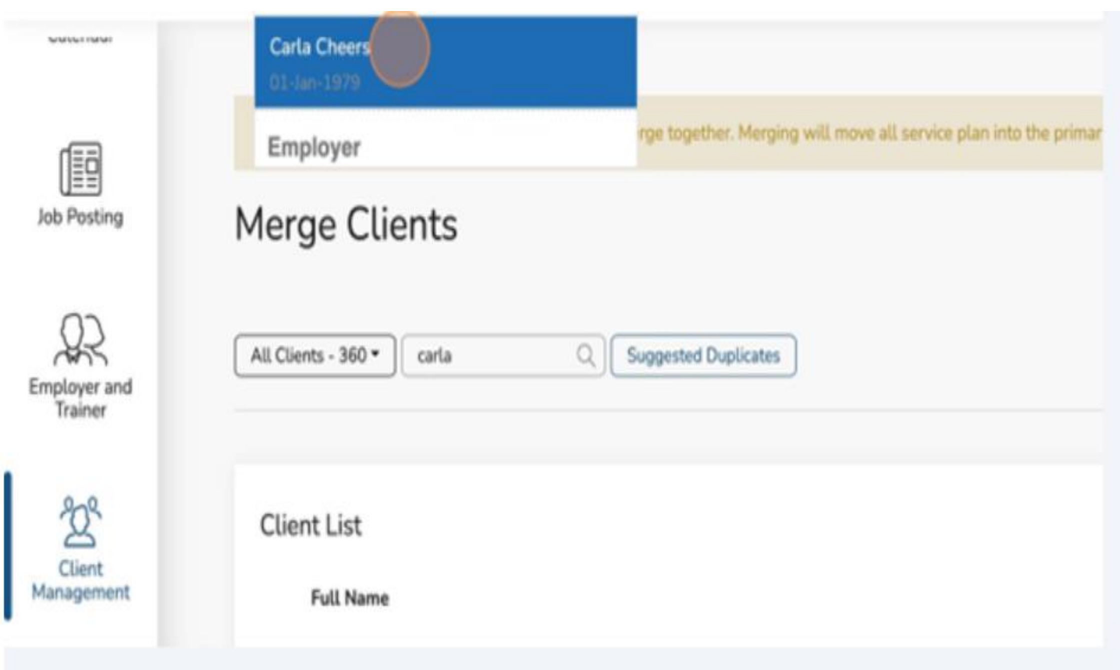


15. Click the “Search” field.

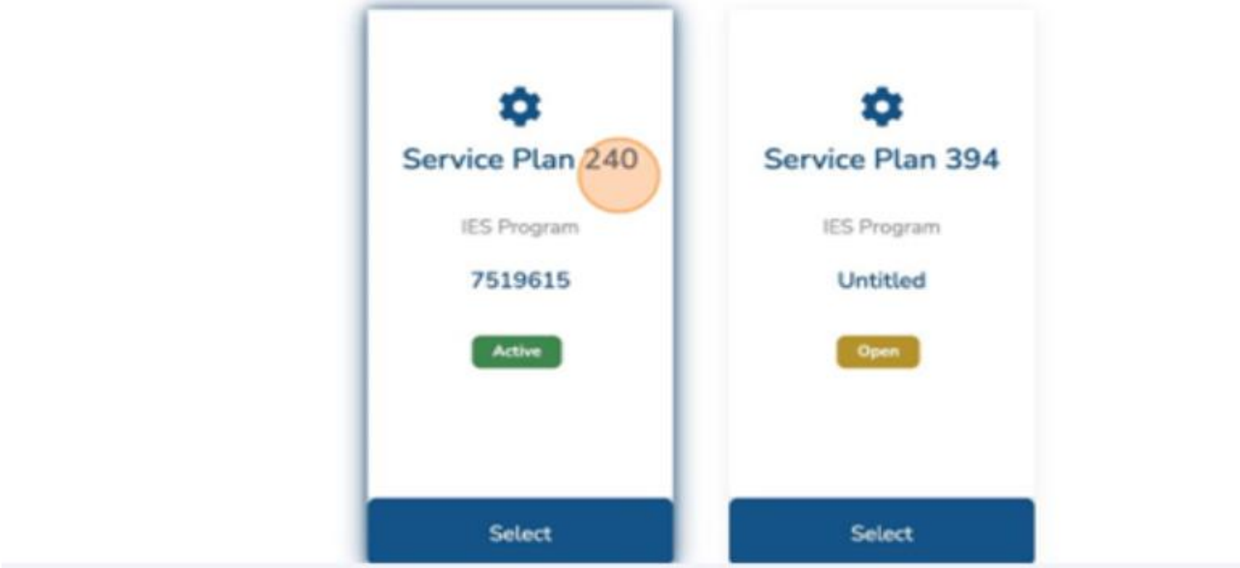


16. Type the name of the client profile you just merged.

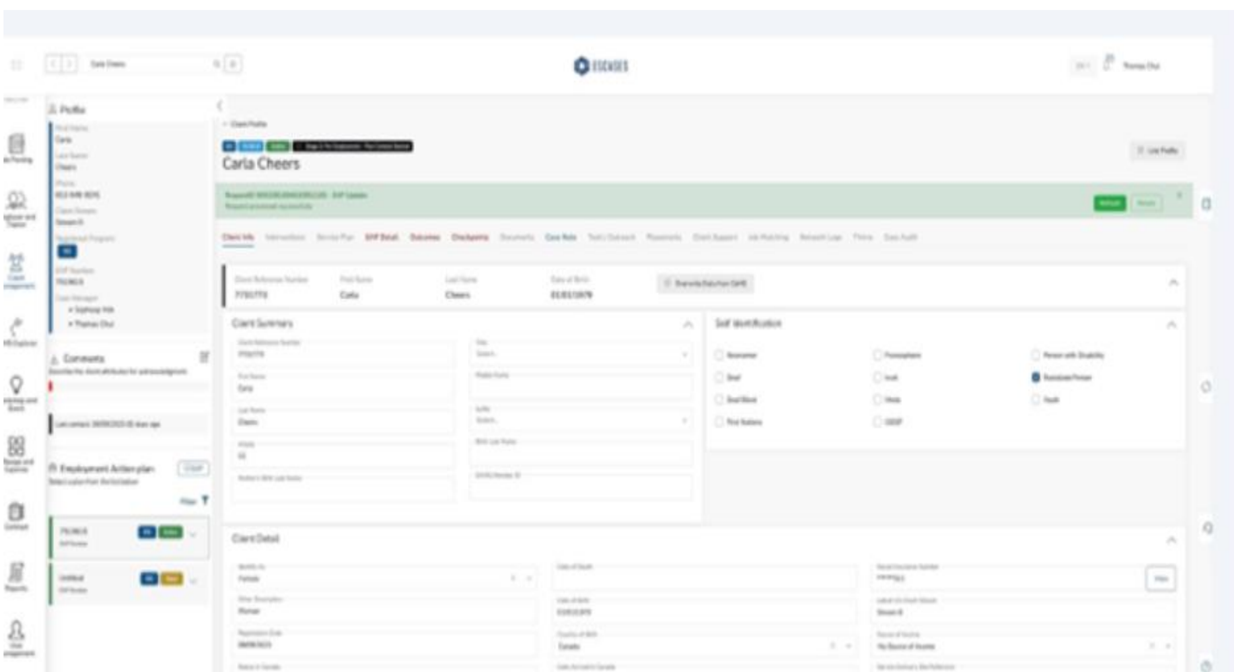
17. Select the “Client profile.”



You can now see two (2) service plans after the merge for the client.



You have successfully merged profiles.

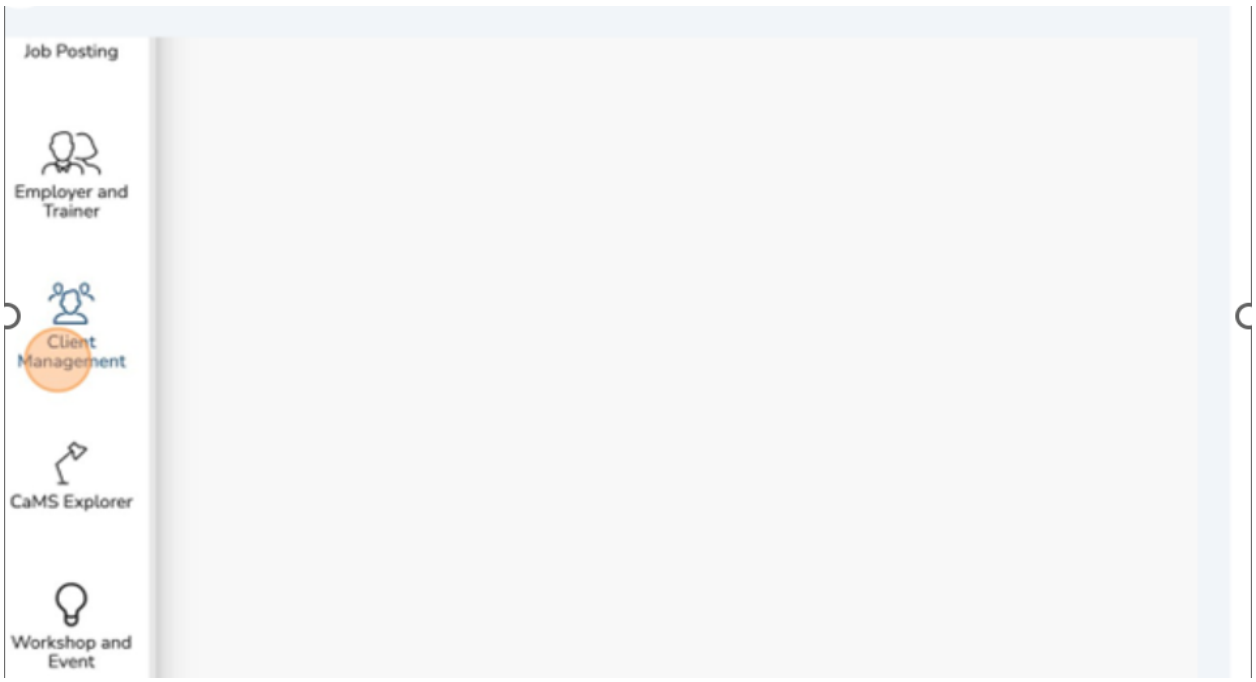


After the Profiles are merged the EAP must be merged. To merge the EAP, complete the steps under merging service plans in the next section.

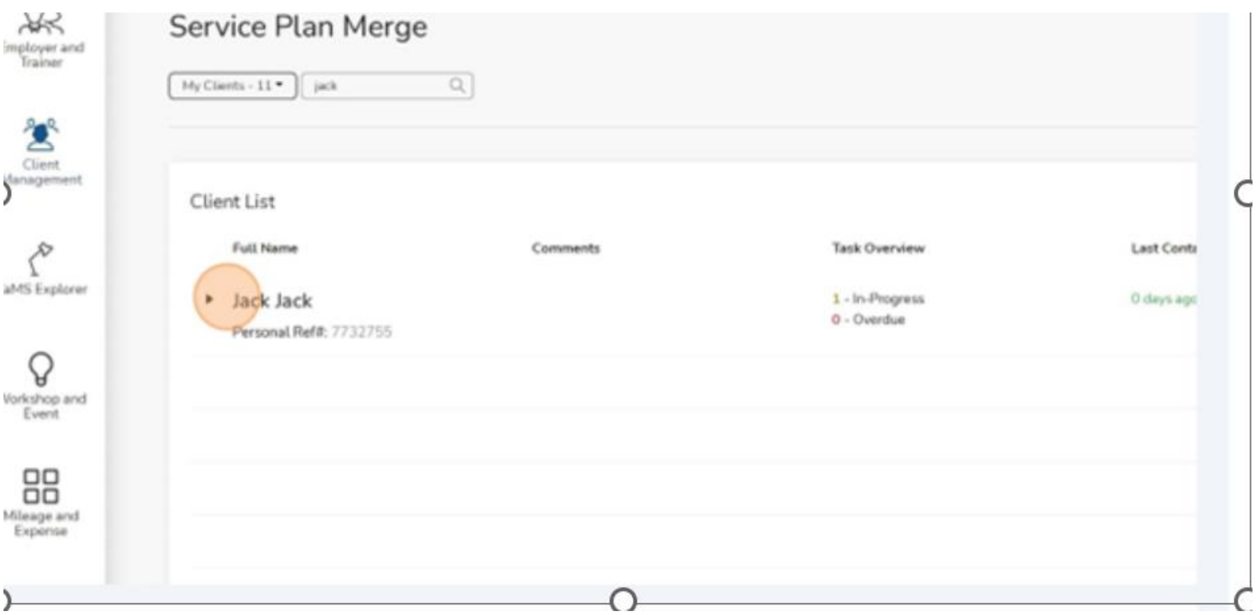
(26) Admin Tools - Merging Service Plans

❖ **Alert!! Merging cannot be undone. Use with extreme caution.**

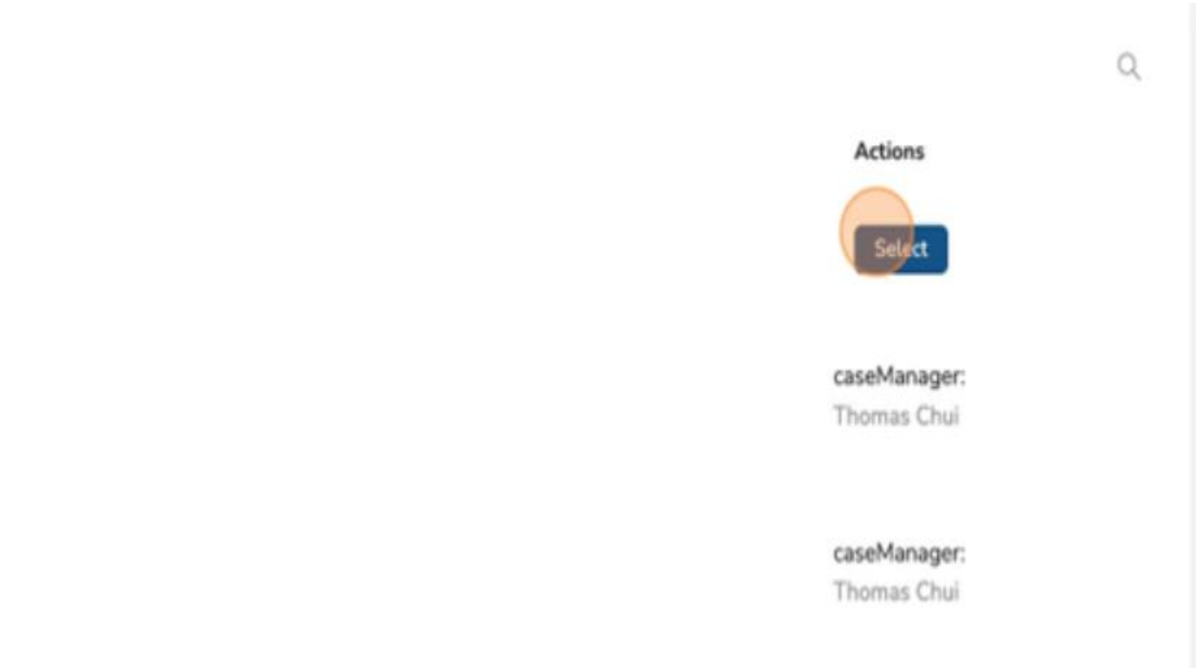
1. Click “Client Management.”



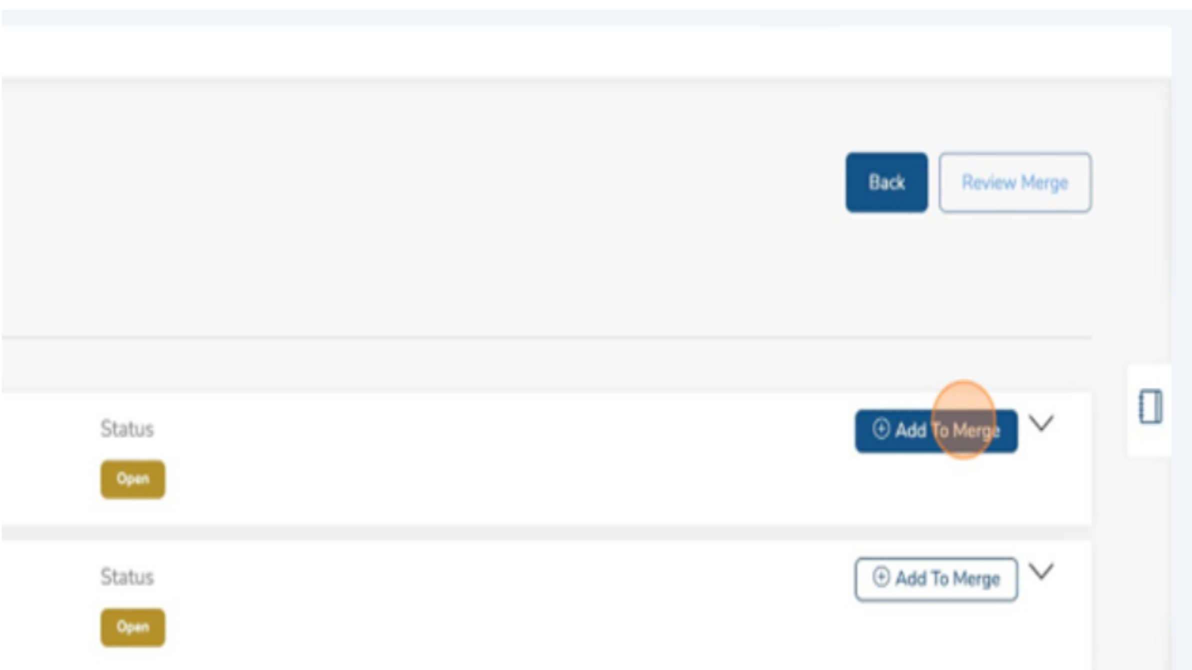
2. Enter the client that has the service plan to be merged.



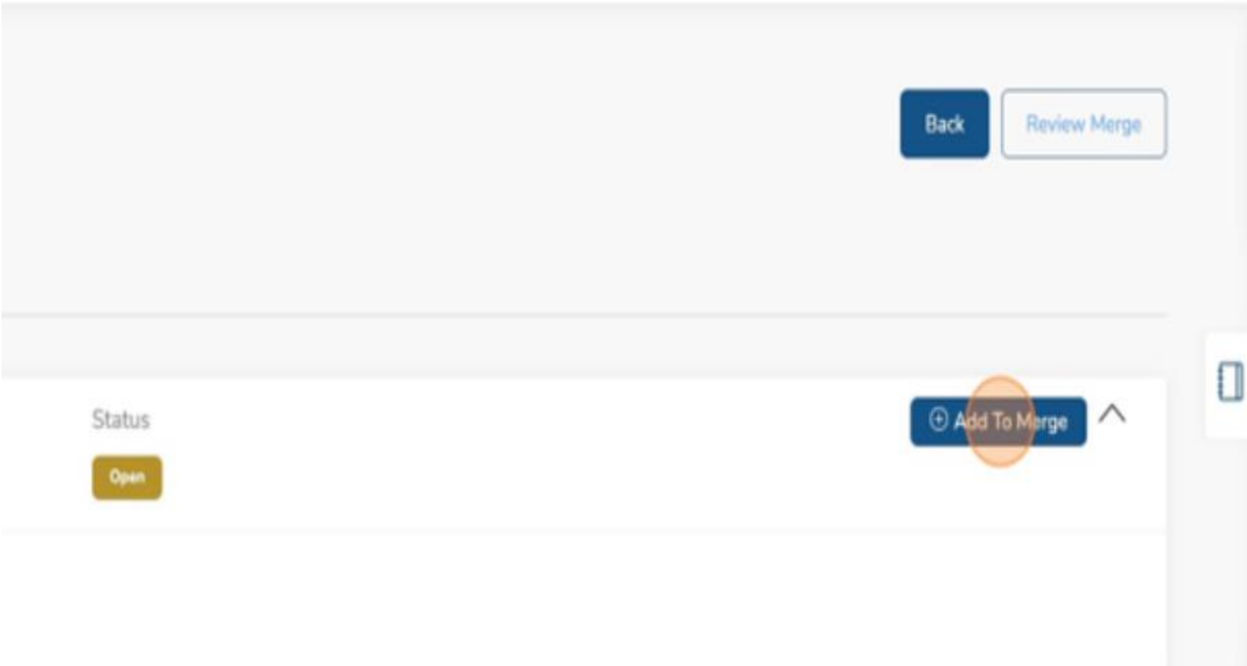
3. Click “Select.”



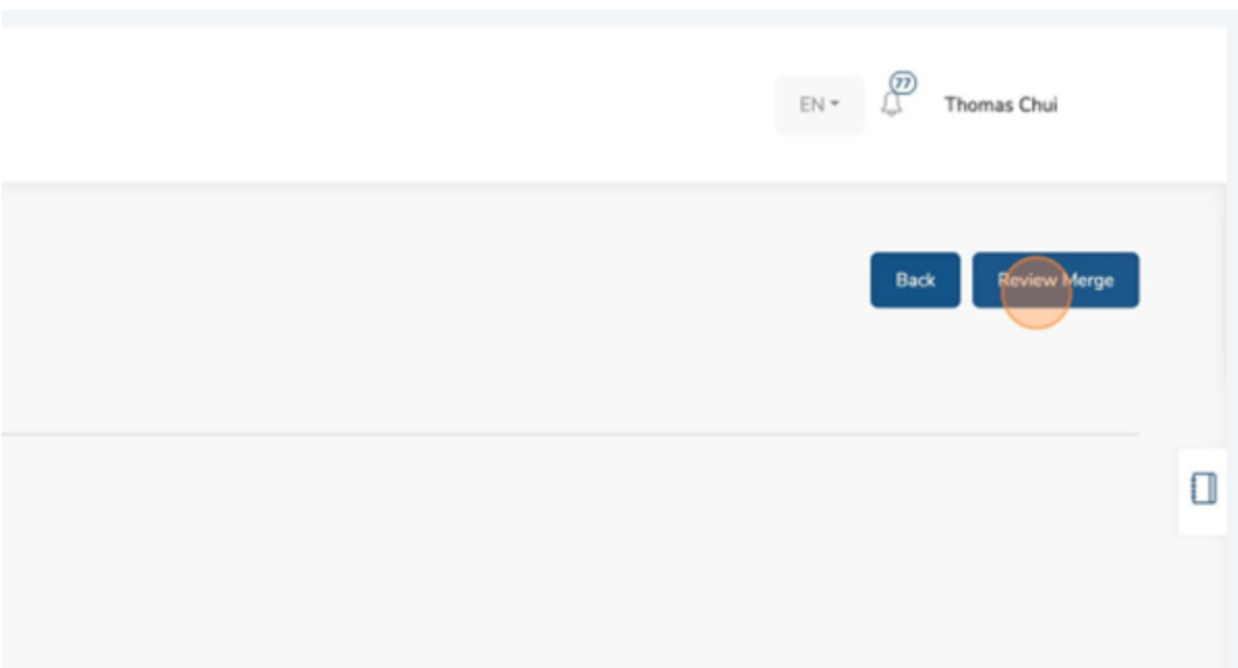
4. Click “Add to Merge” for the first service plan you want to merge.



5. Click “Add to Merge” for the second service plan you want to merge.

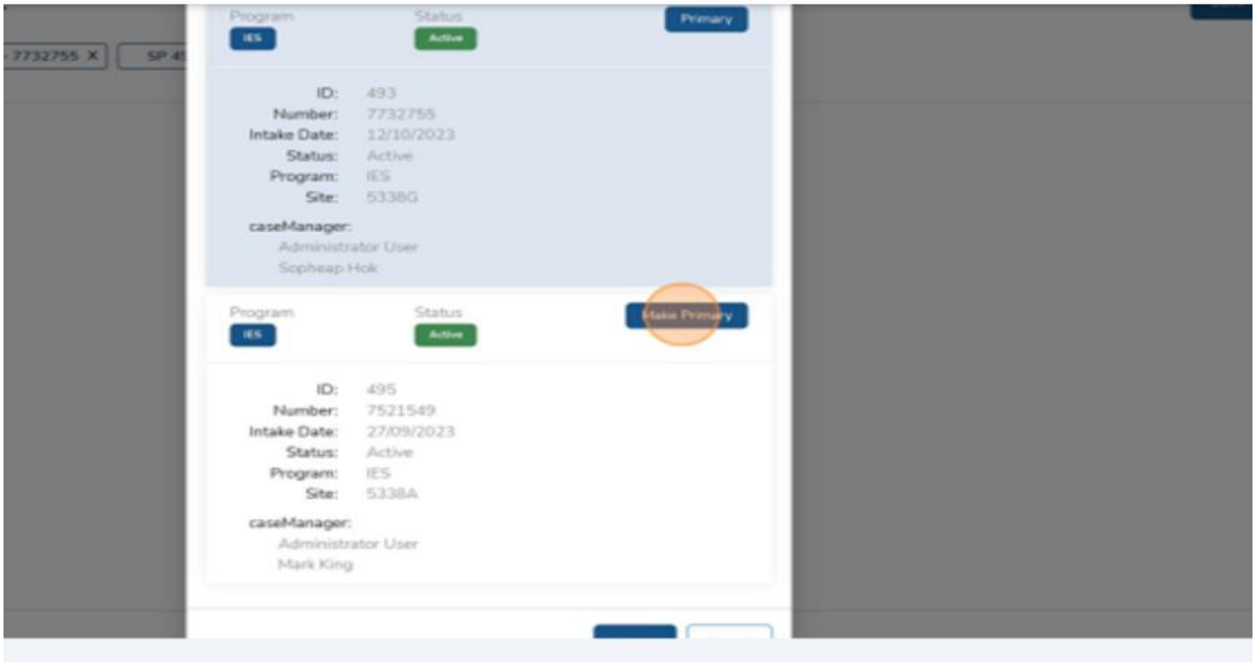


6. Click “Review Merge.”

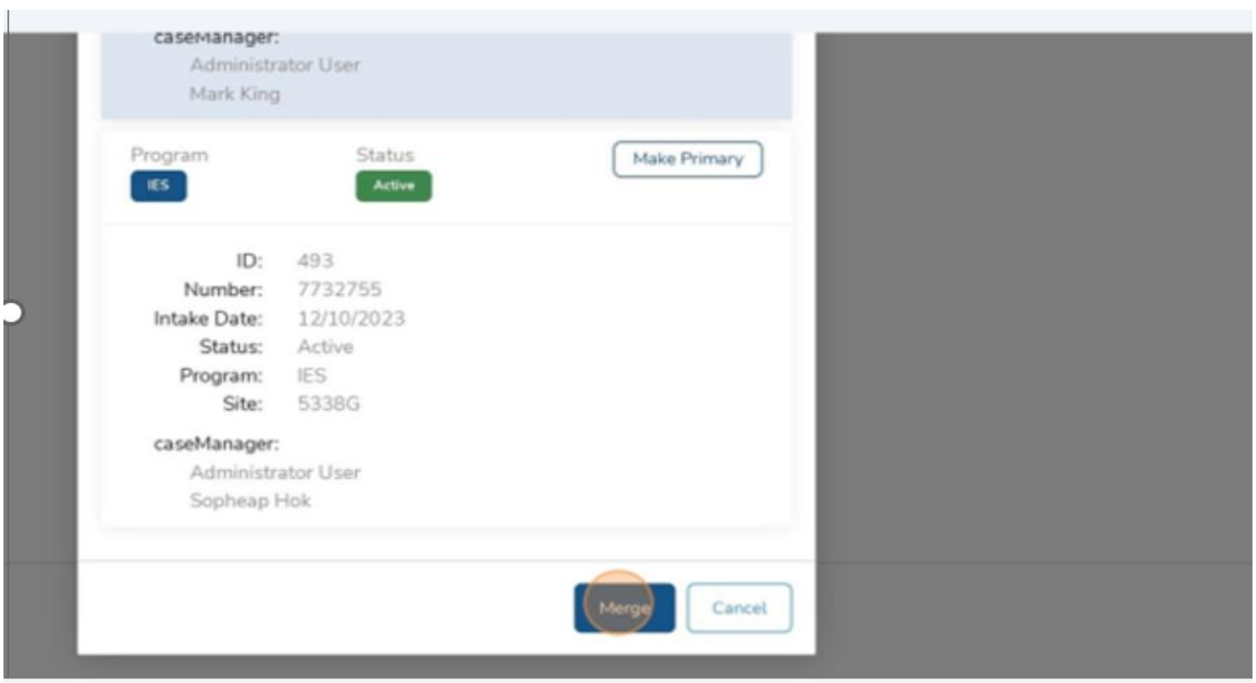


➢ Alert! Choosing the "Primary" service plan will set this as the Primary Service Plan. All other service plans involved in this merge will be consolidated into the primary service plan.

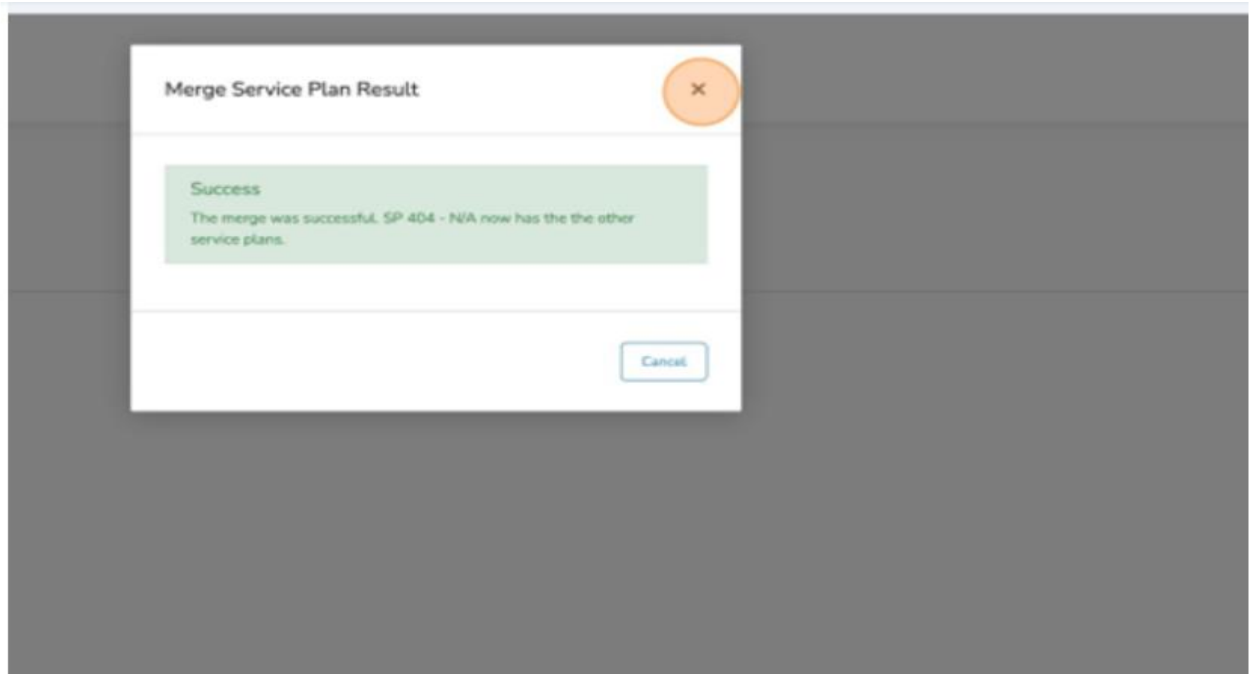
7. Click “Make Primary.”



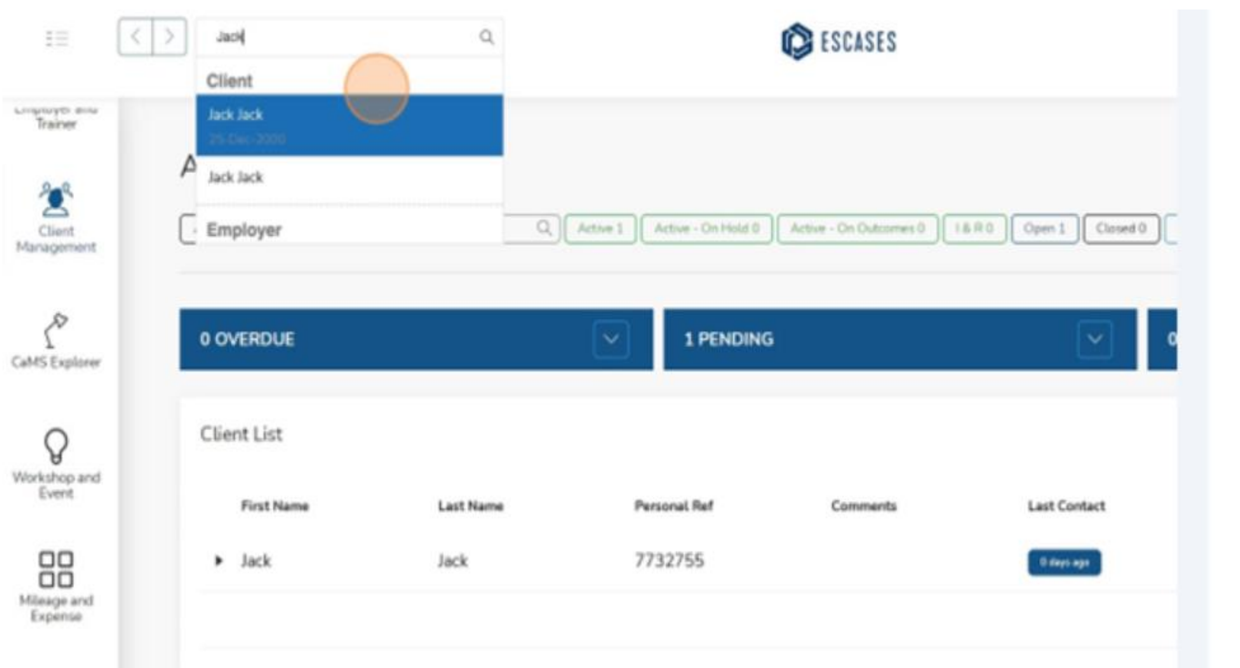
8. Click “Merge.”



9. Click on the “X” to close.



10. Search for your client with the newly merged Service Plans.

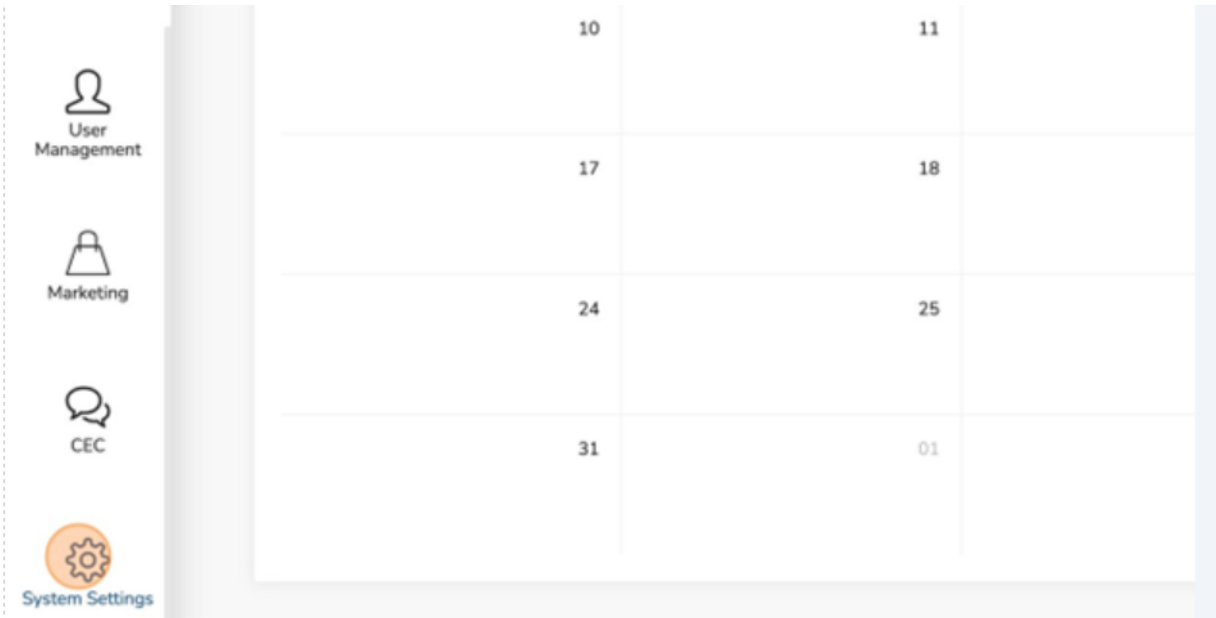


You have successfully merged service plans.

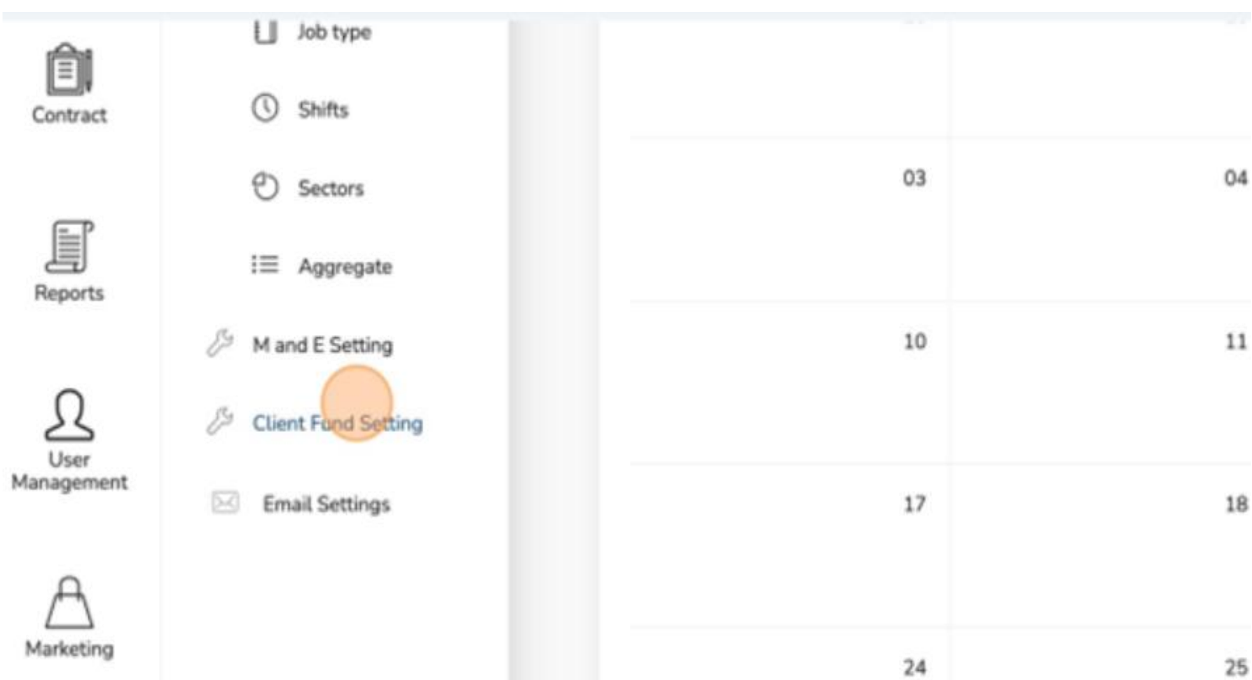
(27) Admin Tools - Client Fund Settings

✓ Note: this can only be completed by staff with the appropriate access level at your organization.

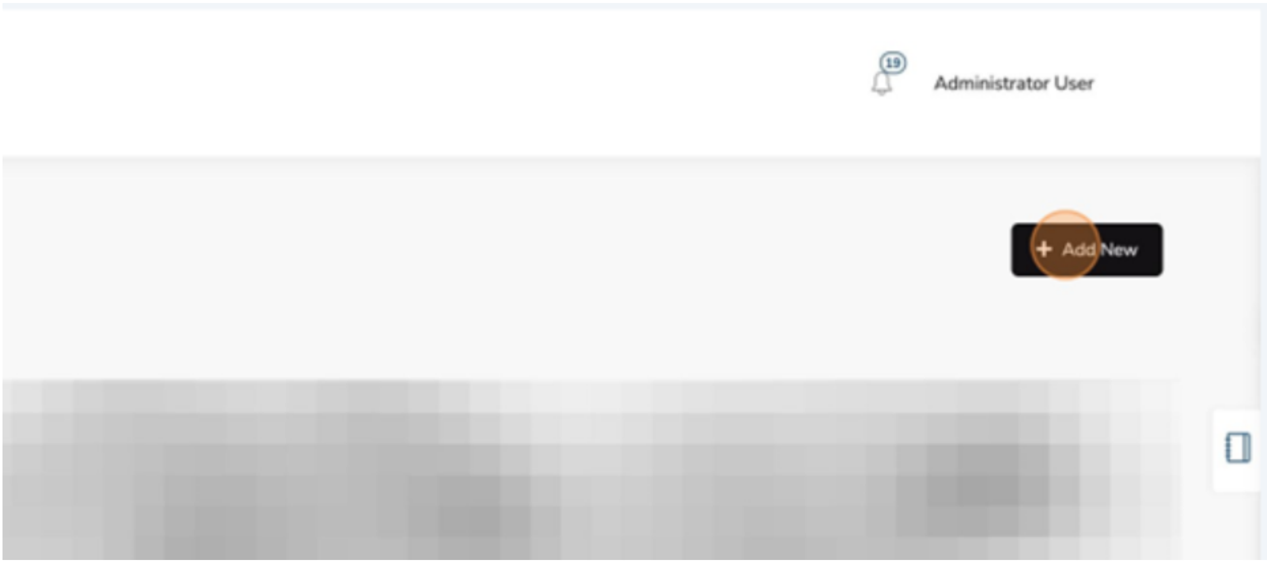
1. Click "System Settings."



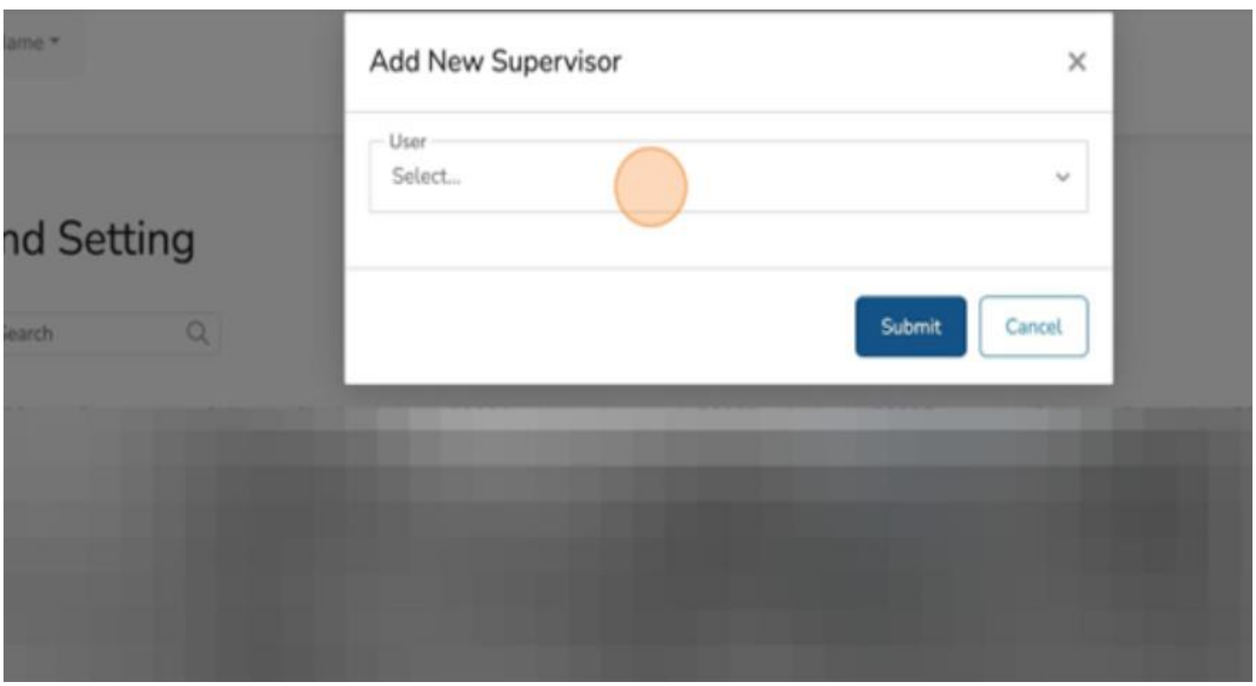
2. Click "Client Fund Settings."



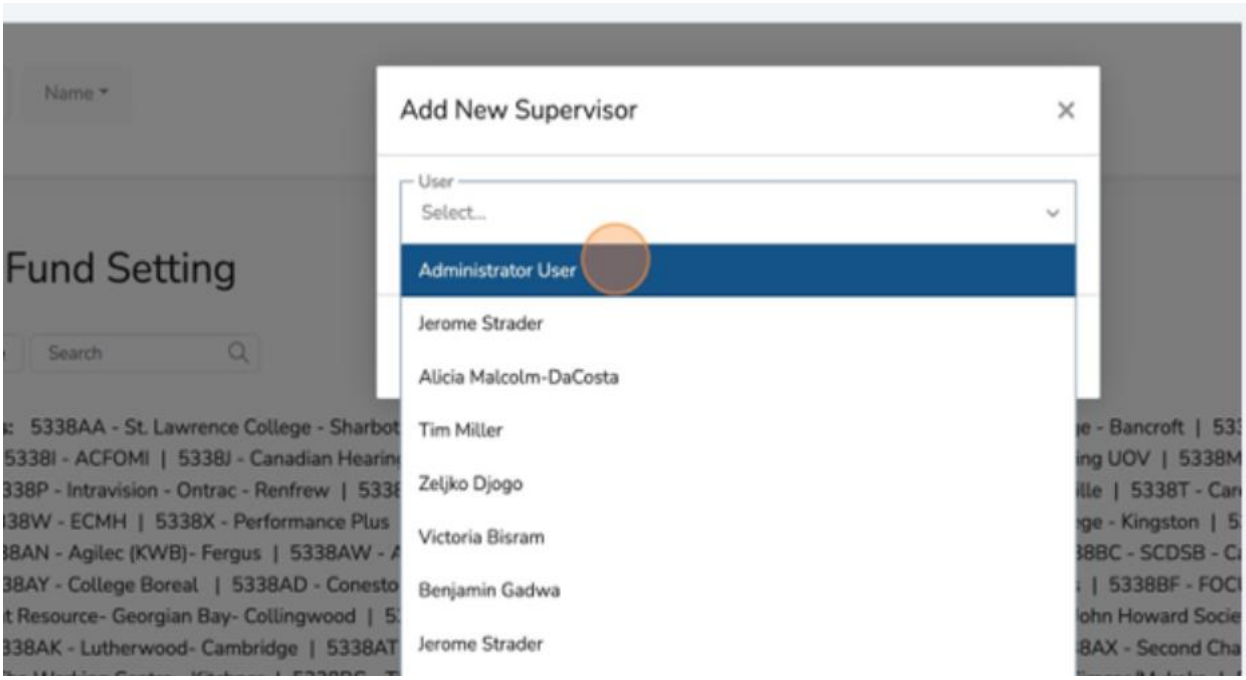
3. Click “Add new.”



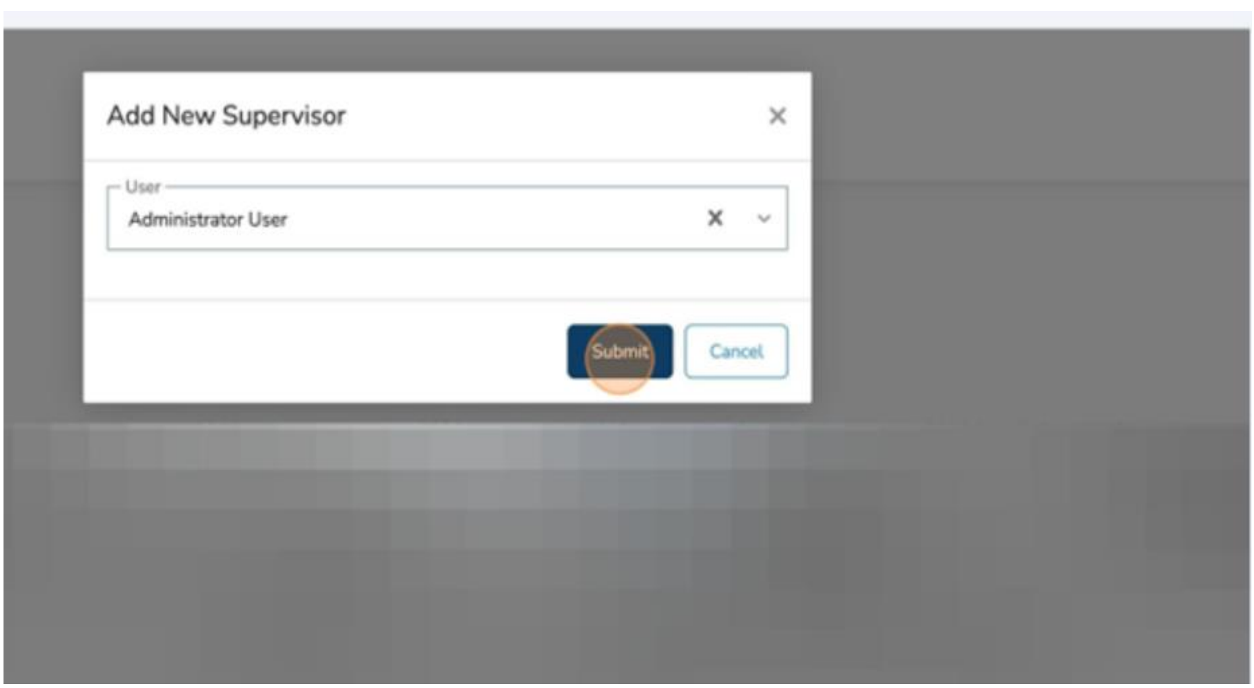
4. Click the “User” field.



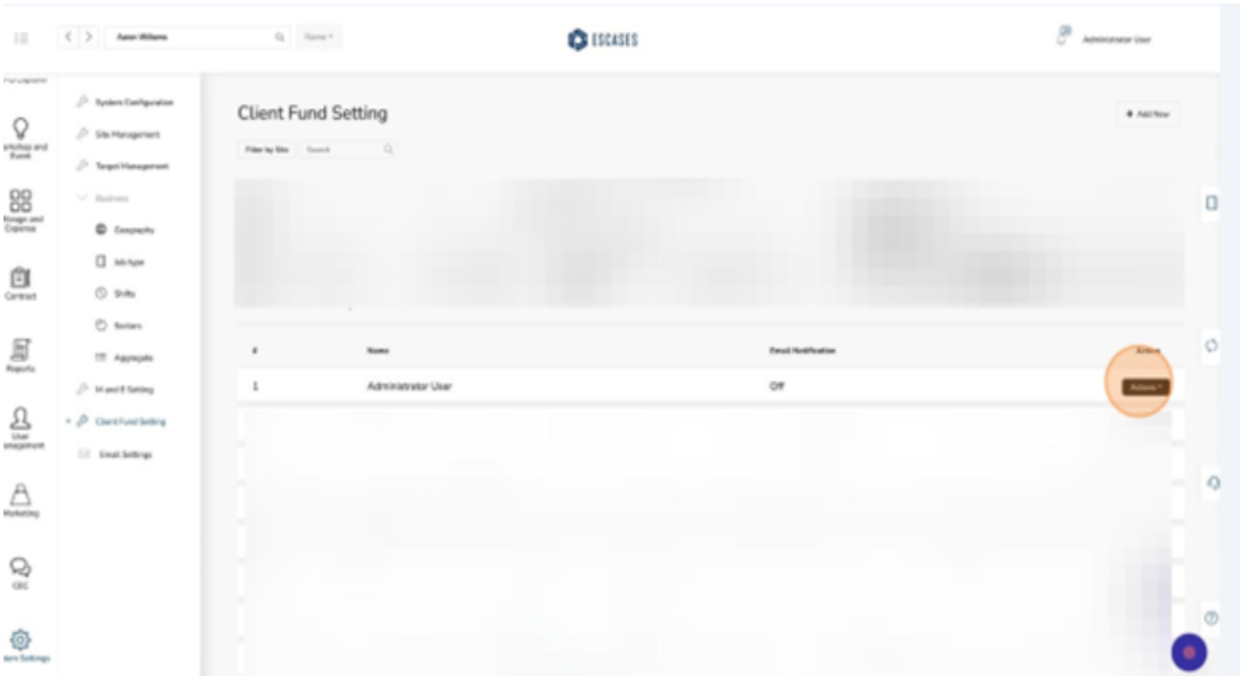
1. Select the appropriate user to add.



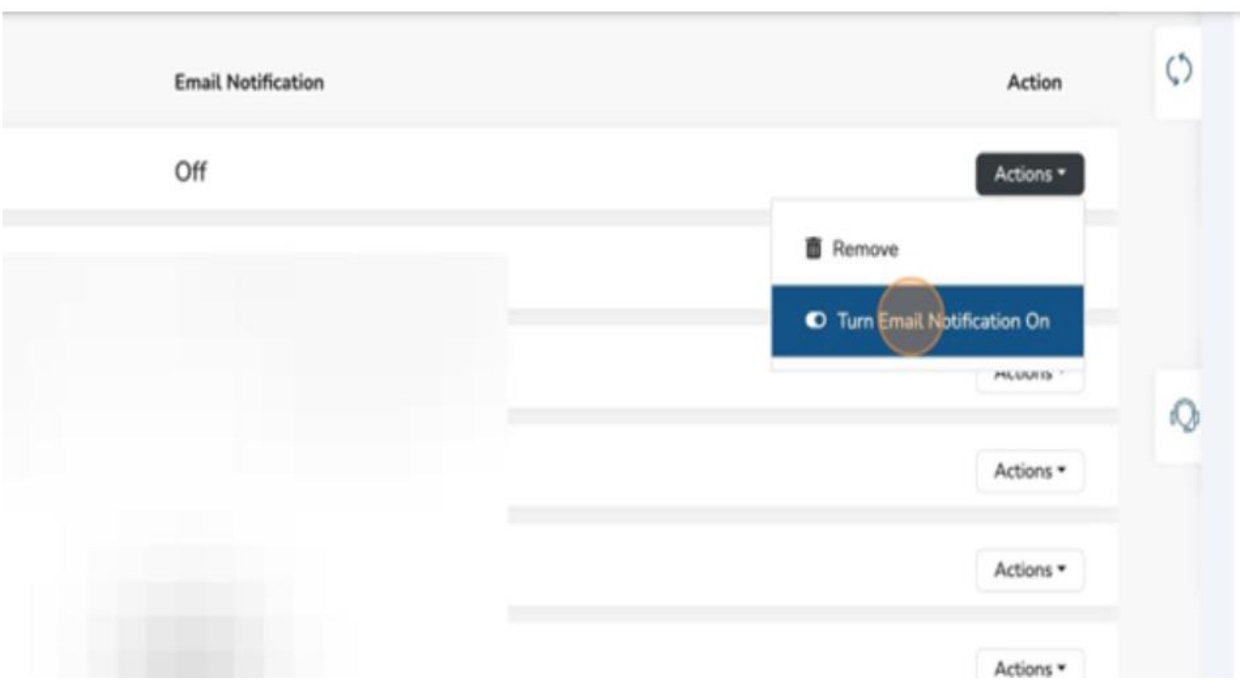
2. Click “Submit.”



3. Click “Actions.”



4. Click “Turn Email Notification On.”



You have successfully added a new user to the assign list.