



# London Regional Employment Services

## ESCases TRAINING GUIDE

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# (1) CaMS

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

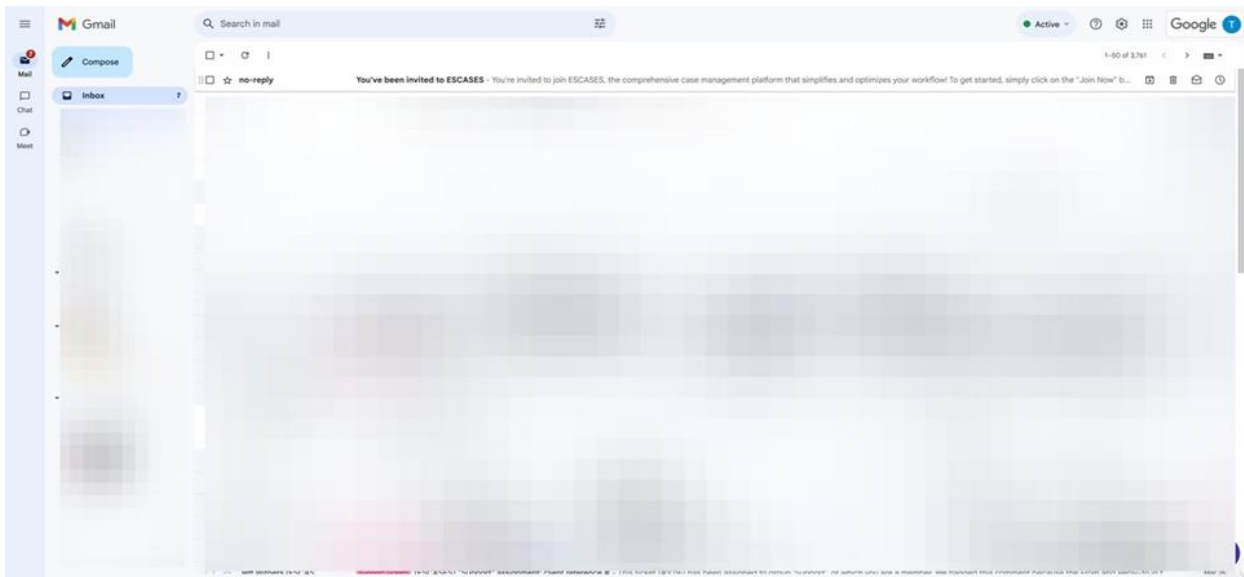
# (2) Accessing ESCases

## 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.

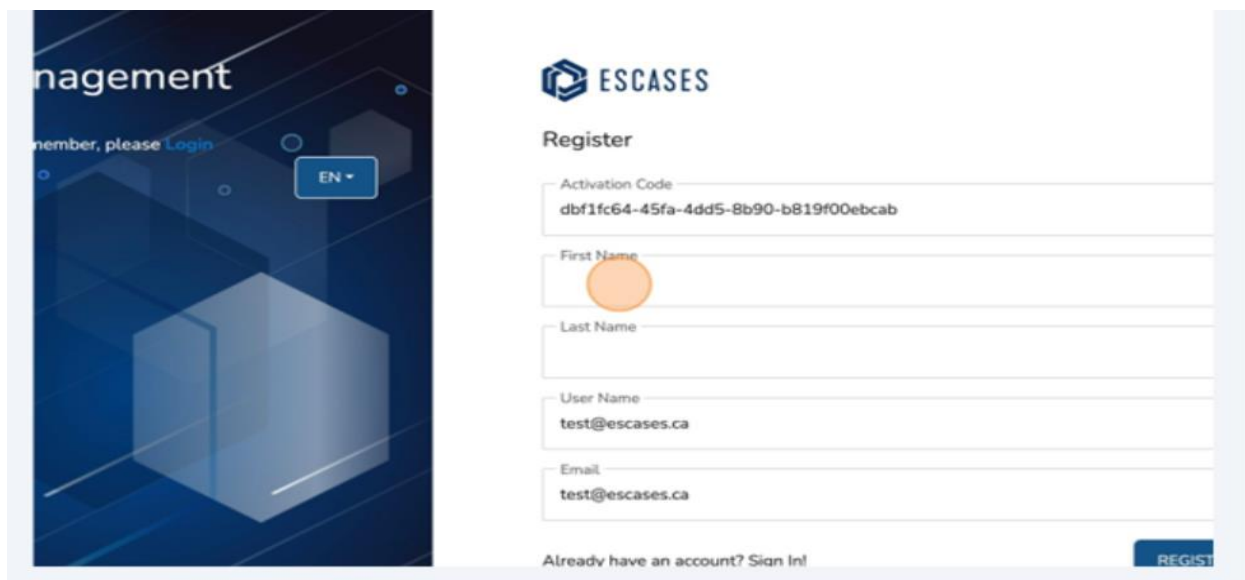
1. Click "Join Now."

To get started, simply click on the "Join Now" button to set up your account and experience the efficiency of ESCASES firsthand. Please note that this invitation will expire in 24 hours, so make sure to take action promptly!

ESCASES is your all-in one performance management software. It puts everything you need exactly where you need it.

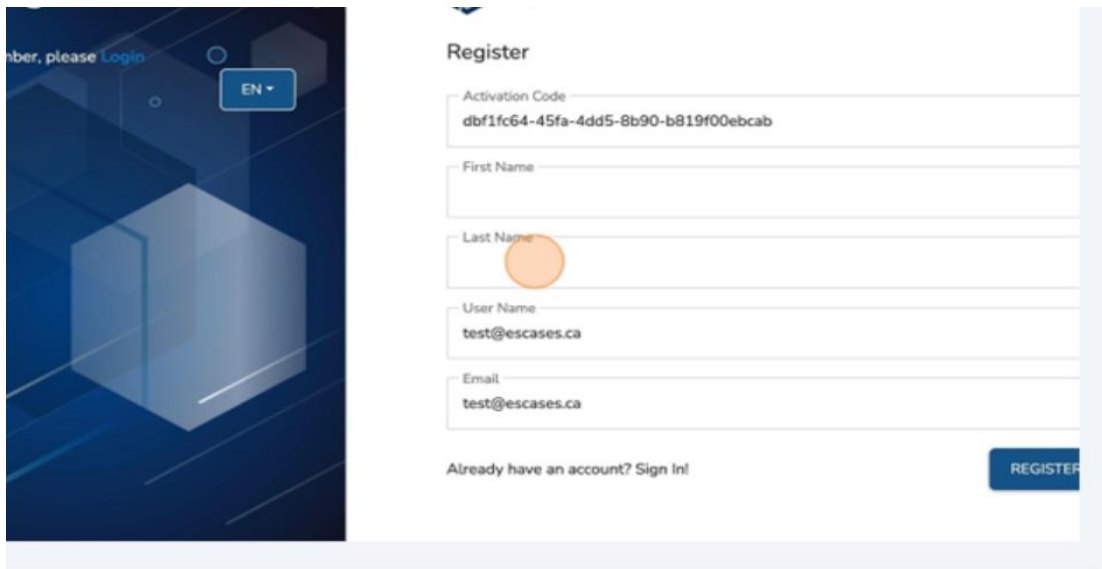


2. Click the "First Name" field.

A screenshot of the ESCASES registration page. On the left is a dark blue sidebar with the word "Management" at the top, a "Login" link, and a blue "EN" button. The main content area features the ESCASES logo and the heading "Register". Below the heading are several input fields: "Activation Code" (containing a long alphanumeric string), "First Name" (with an orange circle cursor), "Last Name", "User Name" (containing "test@escases.ca"), and "Email" (containing "test@escases.ca"). At the bottom left, there is a link "Already have an account? Sign In!". At the bottom right, there is a blue "REGISTER" button.

3. Enter your "First Name" field.

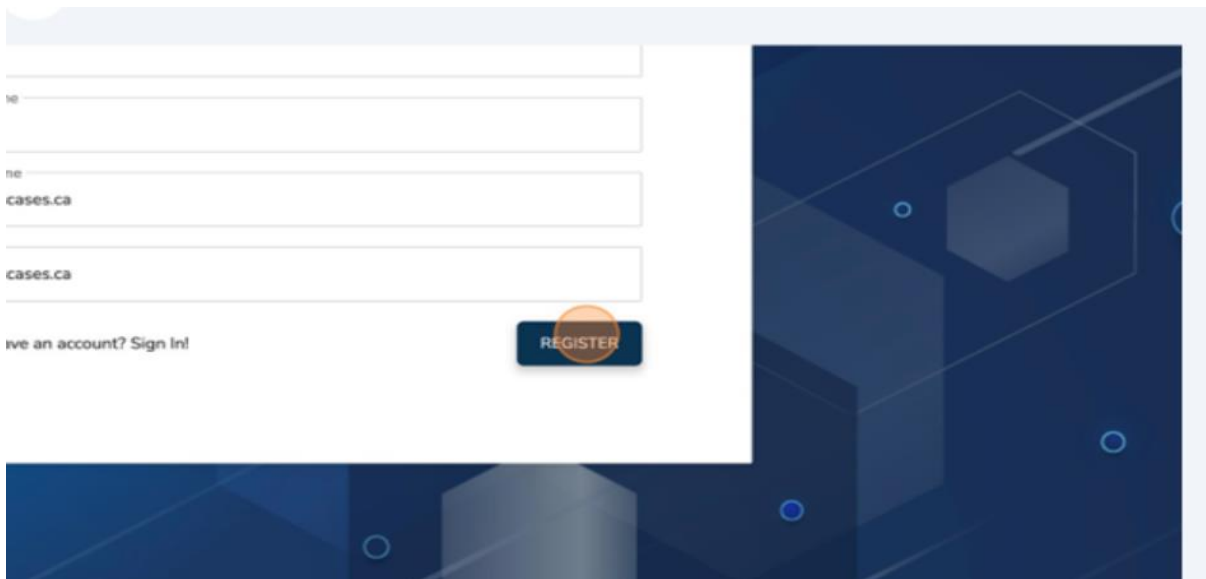
4. Click the “Last Name” field.



The screenshot shows a registration form titled "Register" on a dark blue background with a hexagonal pattern. The form fields are: "Activation Code" (dbf1fc64-45fa-4dd5-8b90-b819f00ebcab), "First Name", "Last Name" (highlighted with an orange circle), "User Name" (test@escases.ca), and "Email" (test@escases.ca). A "REGISTER" button is at the bottom right, and a link "Already have an account? Sign In!" is at the bottom left.

5. Enter your last name.

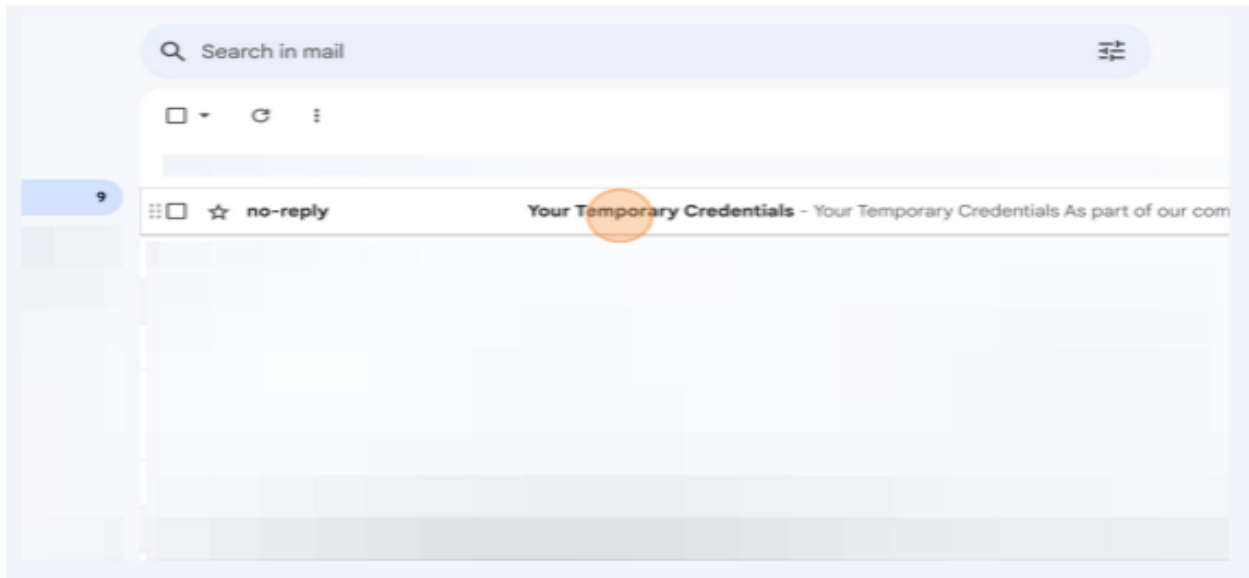
6. Click “Register.”



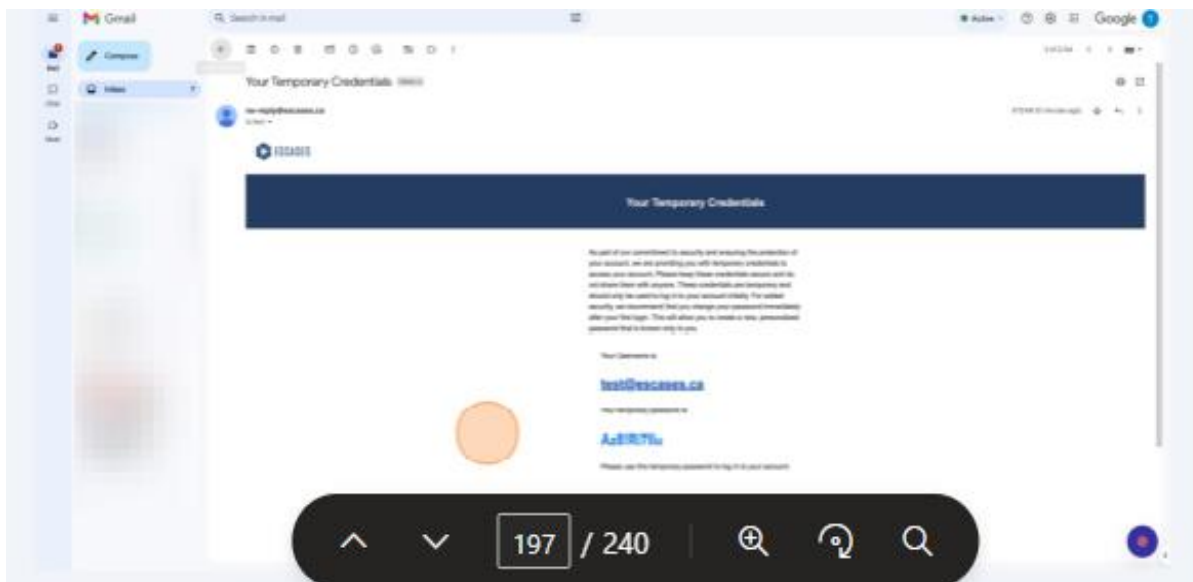
This screenshot is a close-up of the registration form. The "Last Name" field is now filled with "cases.ca". The "REGISTER" button is highlighted with an orange circle. The "Already have an account? Sign In!" link is visible at the bottom left.

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

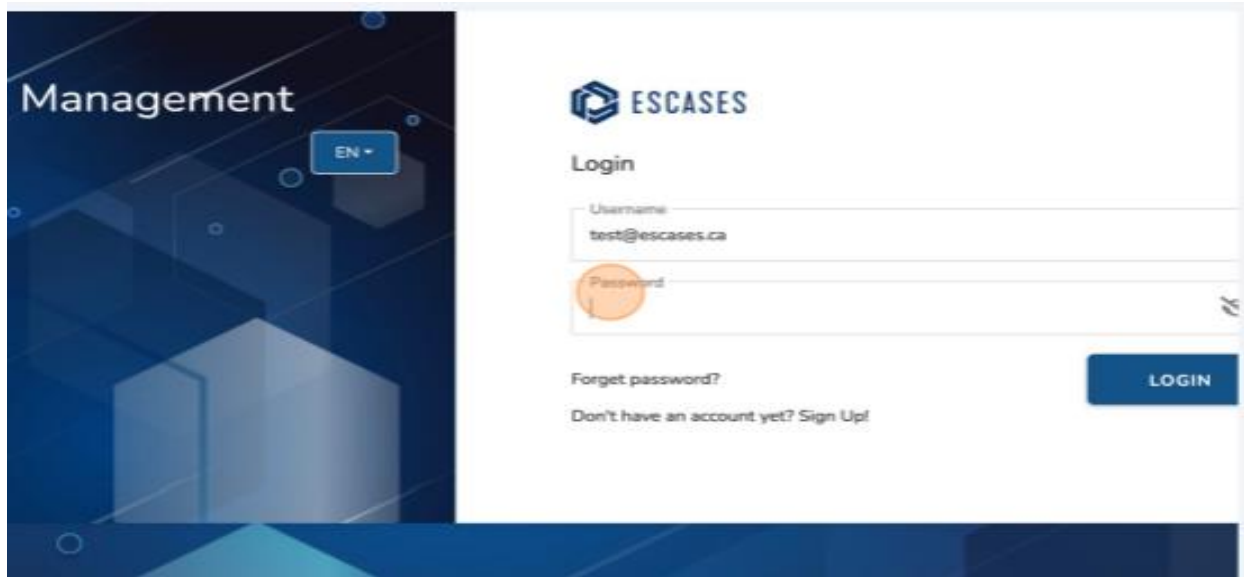
7. Click the email with your temporary credentials.



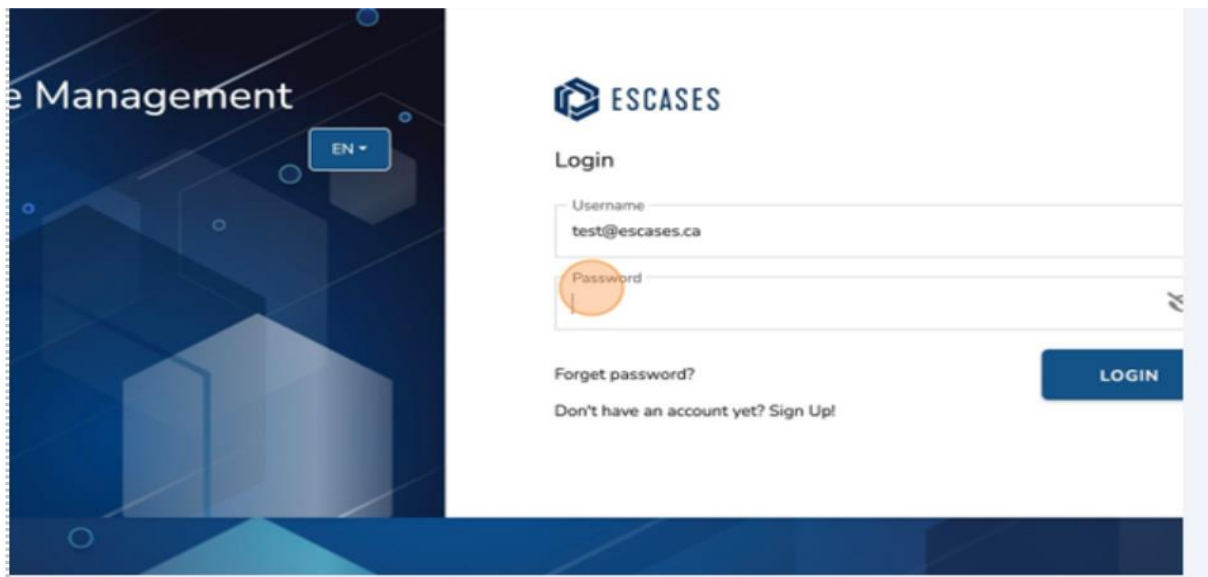
8. Copy your temporary Password.



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.”

gin

Username  
est@escases.ca

Password  
\*\*\*\*\*

Forgot password?

Don't have an account yet? Sign Up!

LOGIN

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

Management

EN

ESCASES

Login

To ensure the security of your account, please create a new password.

Password

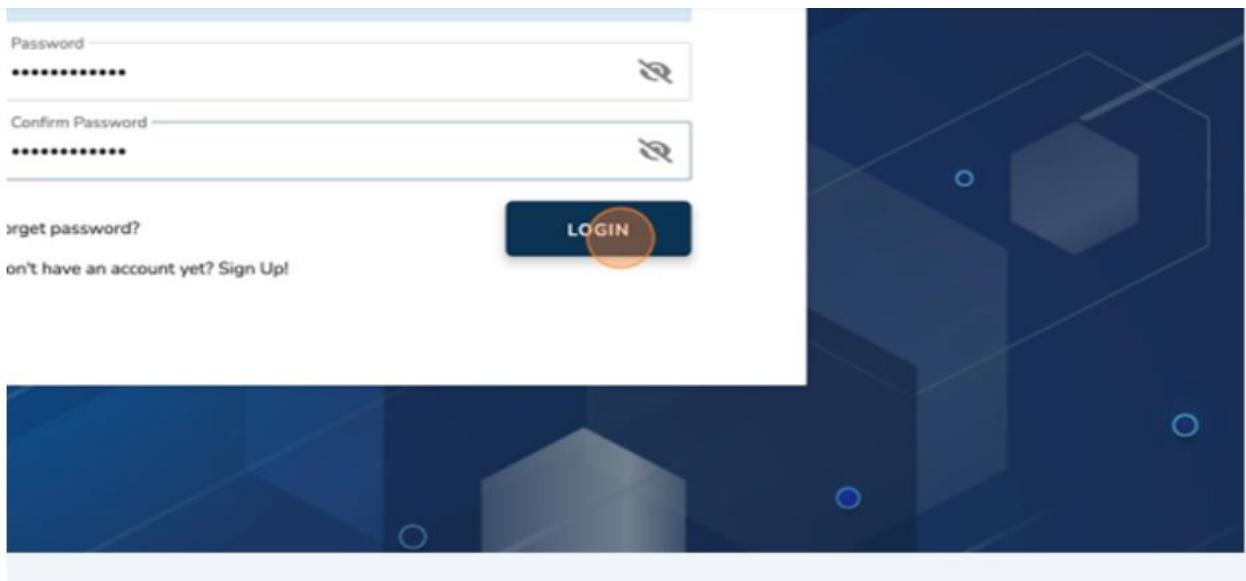
Confirm Password

Forgot password?

Don't have an account yet? Sign Up!

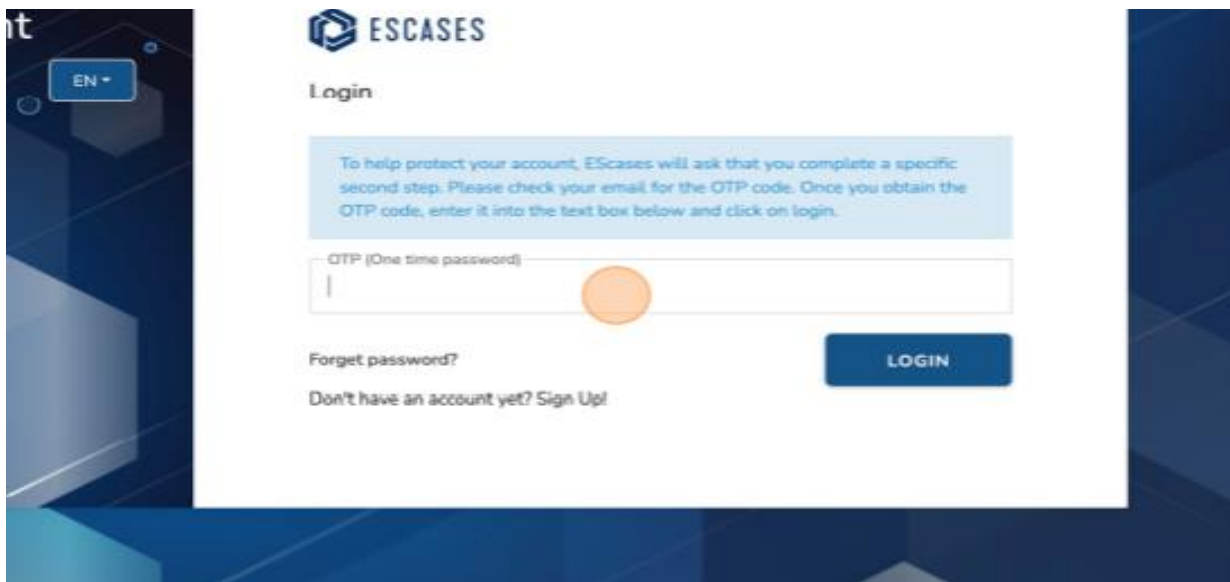
LOGIN

14. Click "Login."



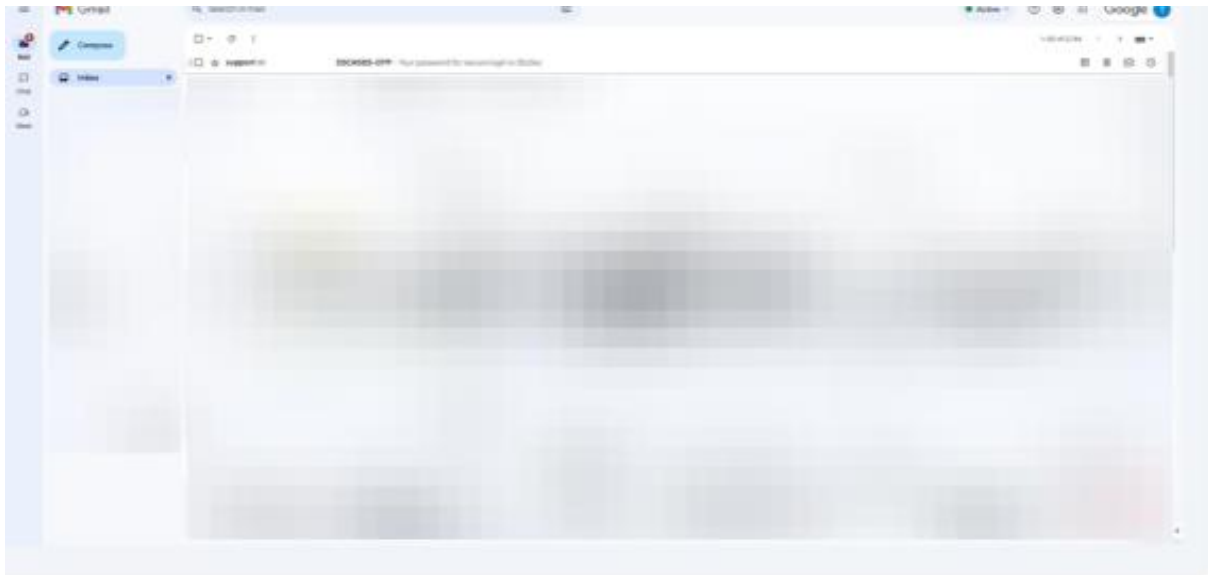
This screenshot shows the login form on the ESCases website. It features two input fields for "Password" and "Confirm Password", both with masked characters and toggle icons. Below the fields are links for "Forgot password?" and "Don't have an account yet? Sign Up!". A prominent blue "LOGIN" button is highlighted with an orange circle.

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

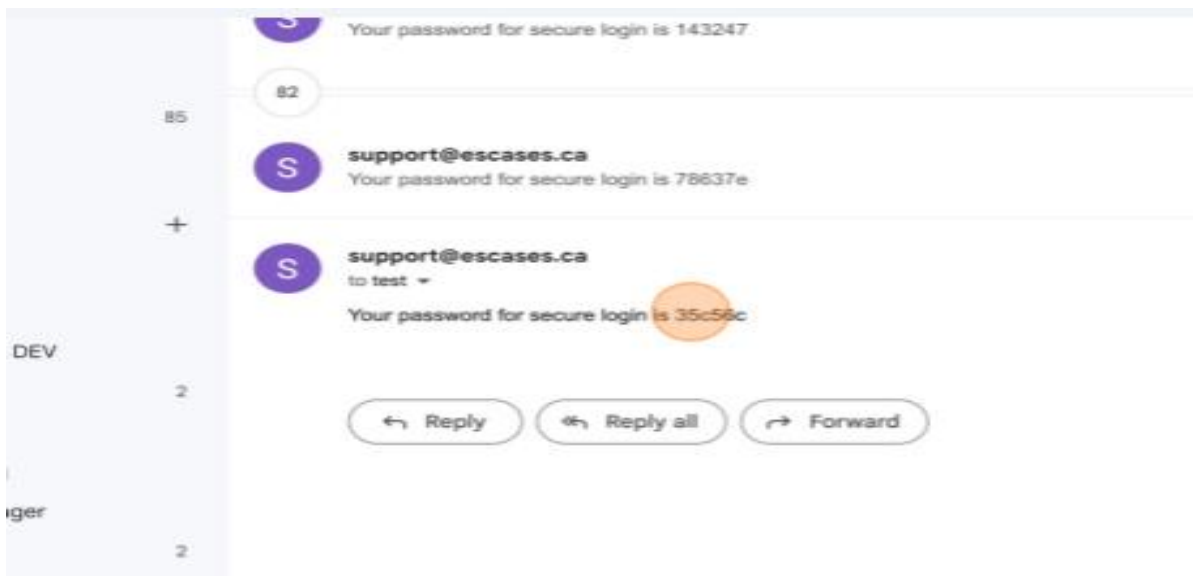


This screenshot shows the OTP verification step on the ESCases website. The page header includes the ESCases logo and a language selector set to "EN". The "Login" heading is followed by a light blue informational box: "To help protect your account, ESCases will ask that you complete a specific second step. Please check your email for the OTP code. Once you obtain the OTP code, enter it into the text box below and click on login." Below this is an input field labeled "OTP (One time password)" with a vertical cursor and a small orange circle. At the bottom, there are links for "Forgot password?" and "Don't have an account yet? Sign Up!", and a blue "LOGIN" button.

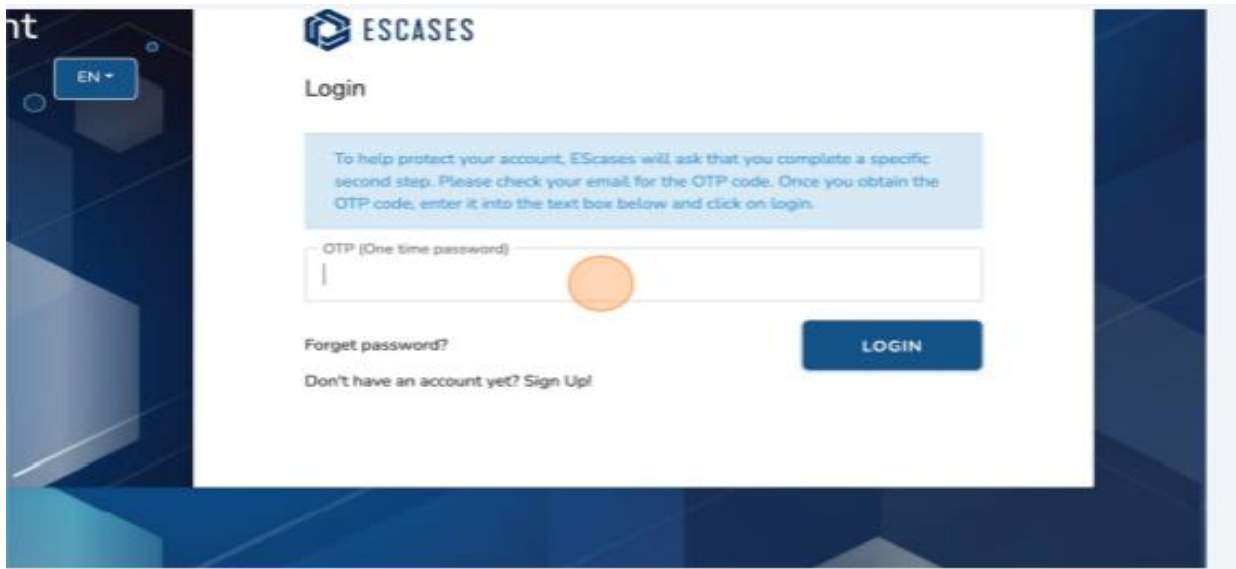
15. Click on the OTP email with the subject "ESCASES-OTP."



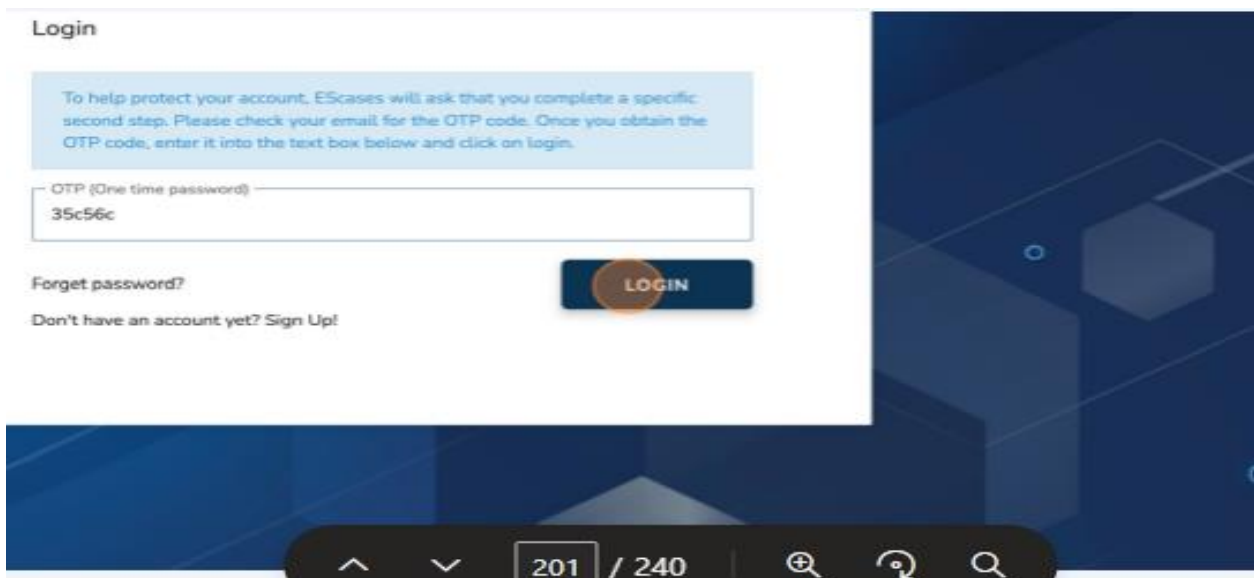
16. Copy the OTP.



17. Paste the OTP.



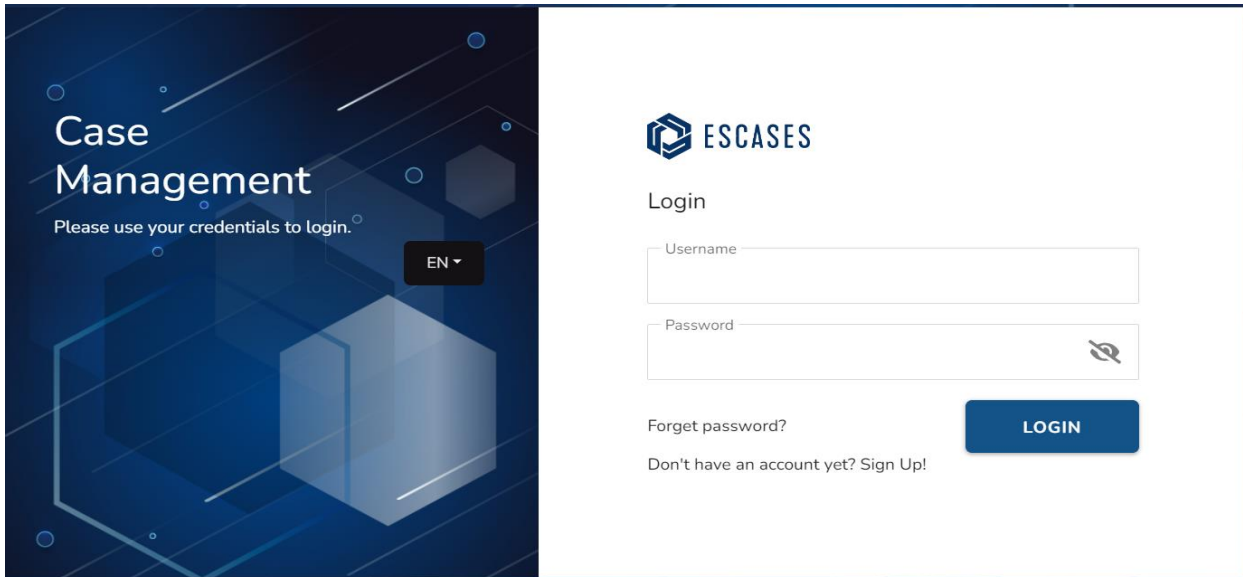
18. Click "Login."



## ESCases First Login

To Log into ESCases, complete the following steps:

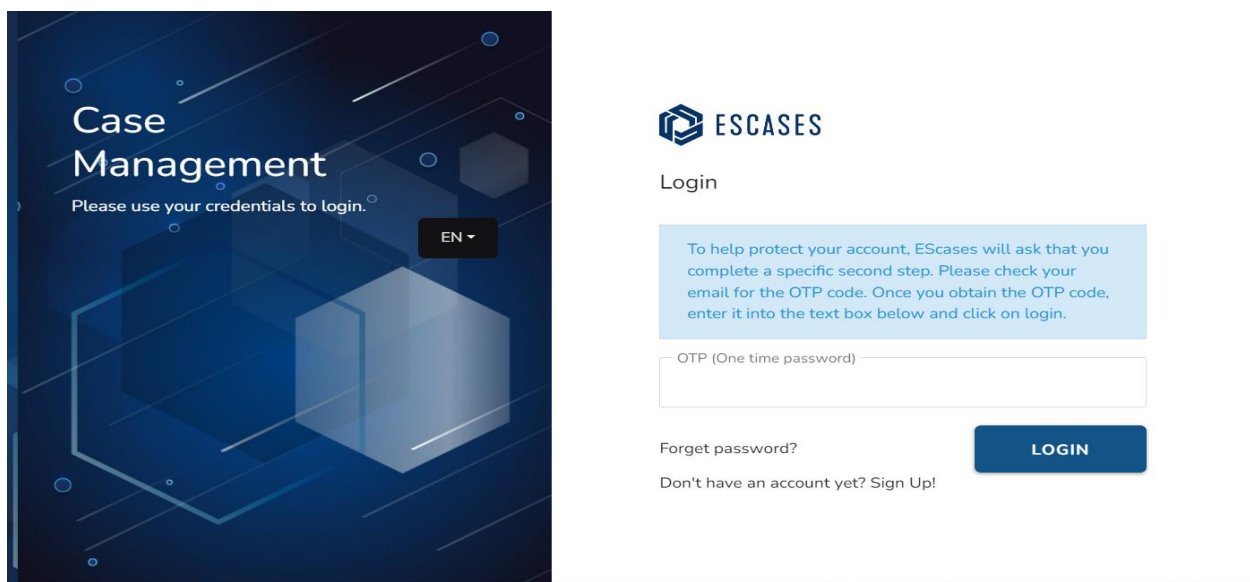
1. Enter Your Username i.e., the email address that was used to create the ESCases account.
2. Enter your Password.



The screenshot shows the ESCases login interface. On the left is a dark blue sidebar with the text "Case Management" and "Please use your credentials to login." Below this is a language selector "EN" with a dropdown arrow. The main content area is white and features the ESCases logo at the top. Below the logo is the word "Login". There are two input fields: "Username" and "Password". The "Password" field has a toggle icon for visibility. Below the fields are links for "Forgot password?" and "Don't have an account yet? Sign Up!". A blue "LOGIN" button is positioned to the right of the "Forgot password?" link.

A one-time password will be emailed to you.

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

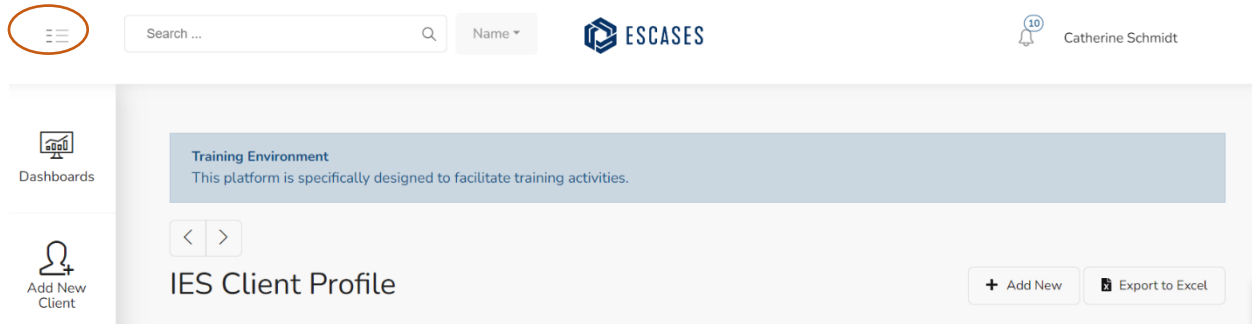


This screenshot shows the second step of the login process. The sidebar and logo remain the same. Below the "Password" field, a light blue informational box contains the text: "To help protect your account, ESCases will ask that you complete a specific second step. Please check your email for the OTP code. Once you obtain the OTP code, enter it into the text box below and click on login." Below this box is an input field labeled "OTP (One time password)". The "Forgot password?" and "Don't have an account yet? Sign Up!" links are still present, and the blue "LOGIN" button is now positioned to the right of the "Don't have an account yet? Sign Up!" link.

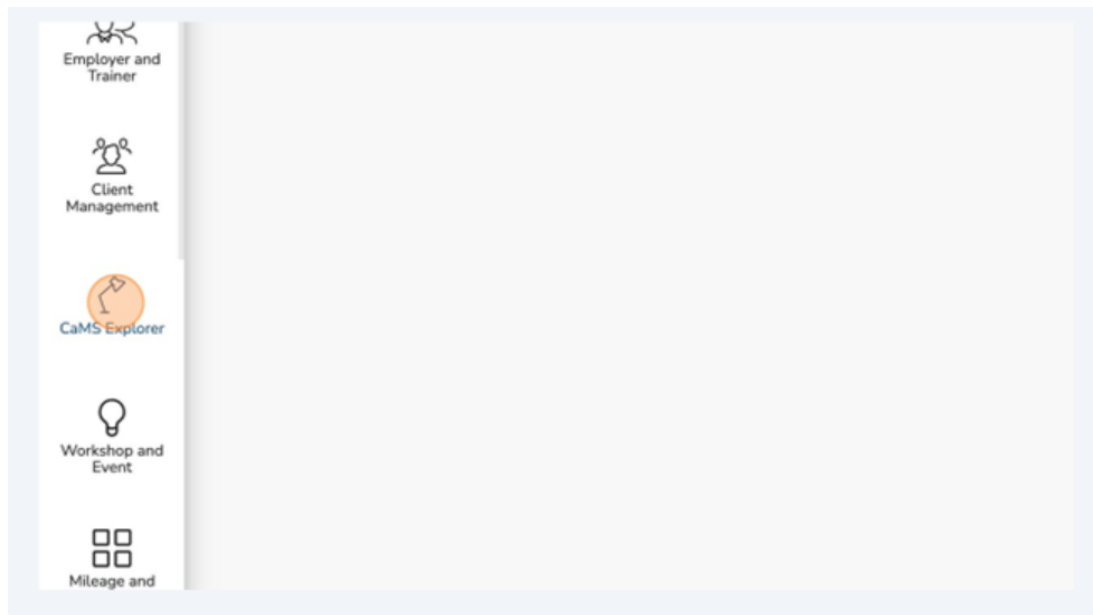
## (3) CaMS Explorer

- ✓ 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.

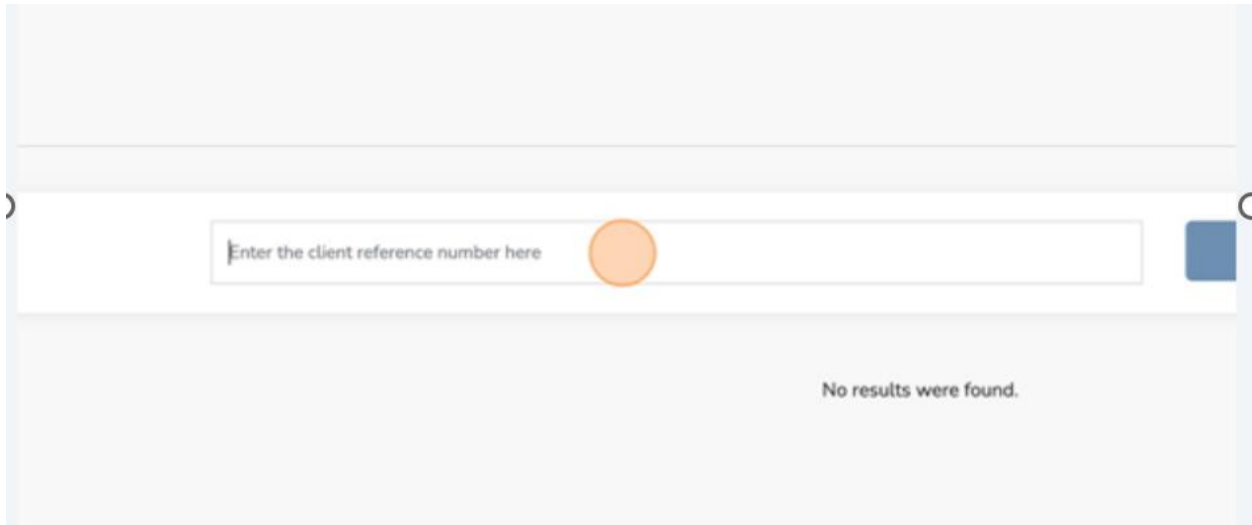
The Person Reference Number will be used to link ESCases and CaMS. To locate the Person Reference Number:

- Log into CaMS.
- Go to “Cases and outcome.”
- Under “Short Cuts” click on “Find Person.”
- The “Person Search” 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”.

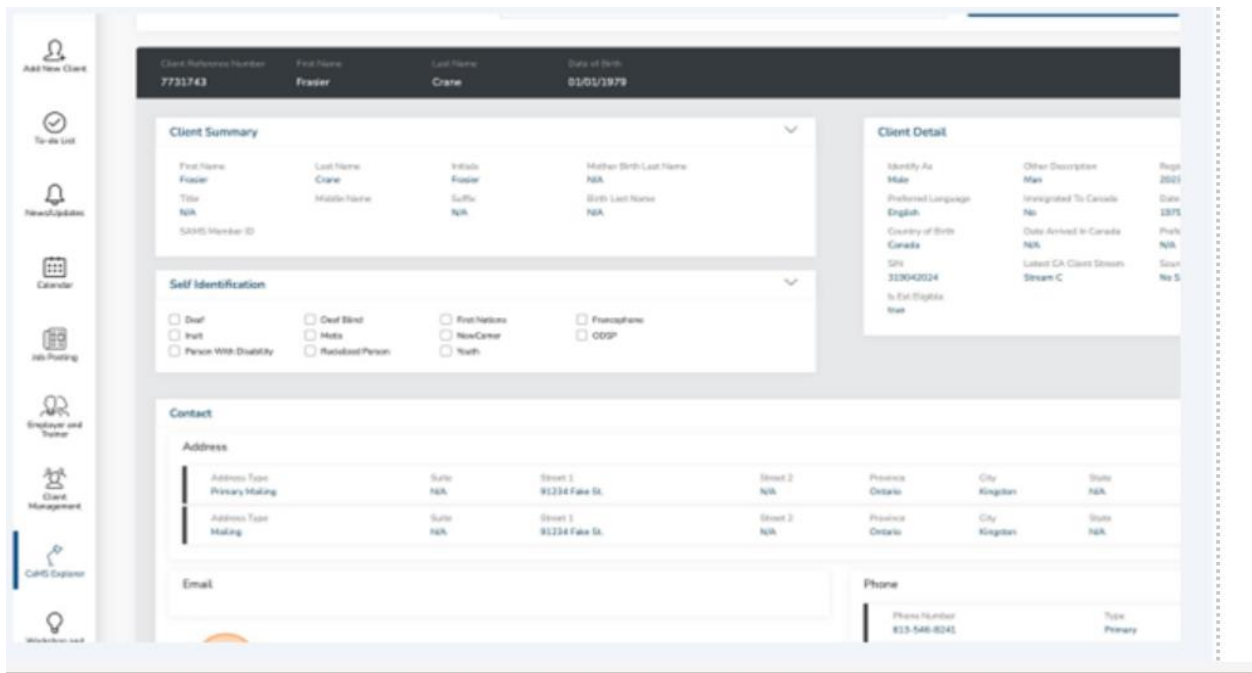
The screenshot shows the 'Person Search' interface in the 'CASE MANAGEMENT SYSTEM - SSM MANAGER APPLICATION'. The search form includes fields for Reference Number, Last Name, First Name, Date of Birth, and APPR Client Party ID. There are also checkboxes for 'I Identify As' and 'Display cases with SAMS Member ID'. A 'Search' button and a 'Reset' button are present. Below the search form, the 'Search Results' table is displayed with the following columns: Reference Number, First Name, Last Name, City, Date of Birth, APPR Client Party ID, and SAMS Member ID. The 'Reference Number' column is circled in orange.

Reference Number	First Name	Last Name	City	Date of Birth	APPR Client Party ID	SAMS Member ID
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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.

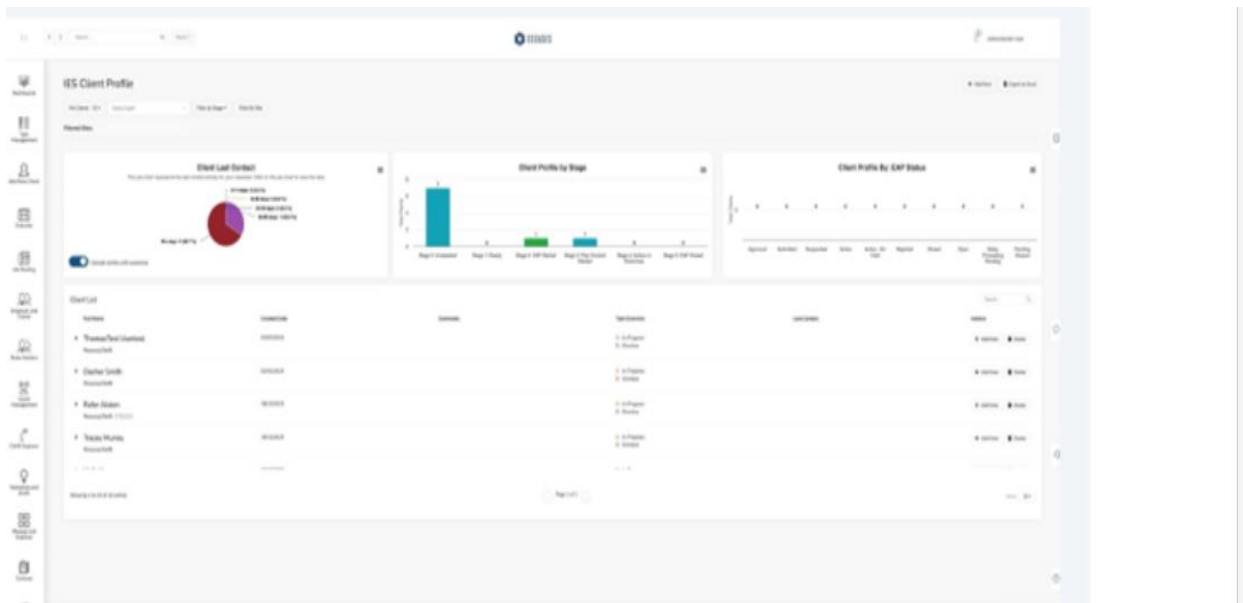


## (4) Add New Client

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.

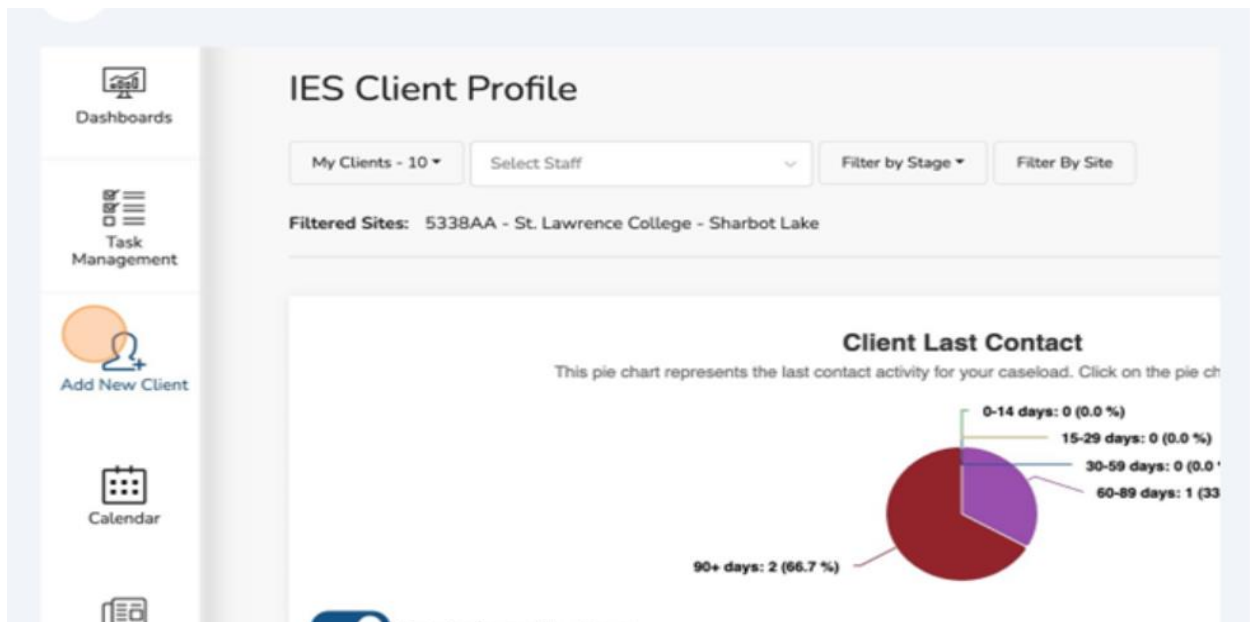
✓ Note: Only Case-Managed clients will be entered into ESCases at this time.

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.

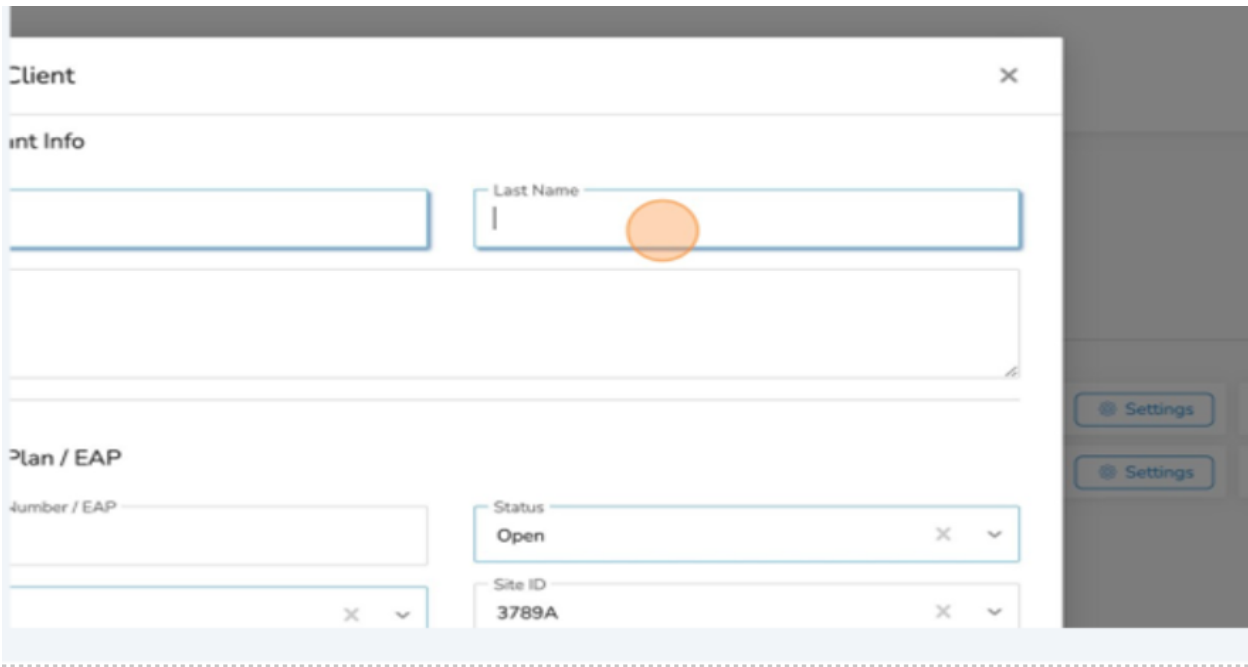


3. Click “First Name.”

The screenshot shows the 'Add New Client' form. The 'Participant Info' section contains a 'First Name' text input field, which is highlighted with an orange circle. To its right is a 'Last Name' text input field. Below these is a 'Note' text area. The 'Service Plan / EAP' section includes a 'Service Plan Number / EAP' text input field, a 'Status' dropdown menu set to 'Open', a 'Program' dropdown menu set to 'IES', and a 'Site ID' text input field set to '3789A'. There are two 'Settings' buttons on the left side of the form.

4. Enter the client’s First Name.

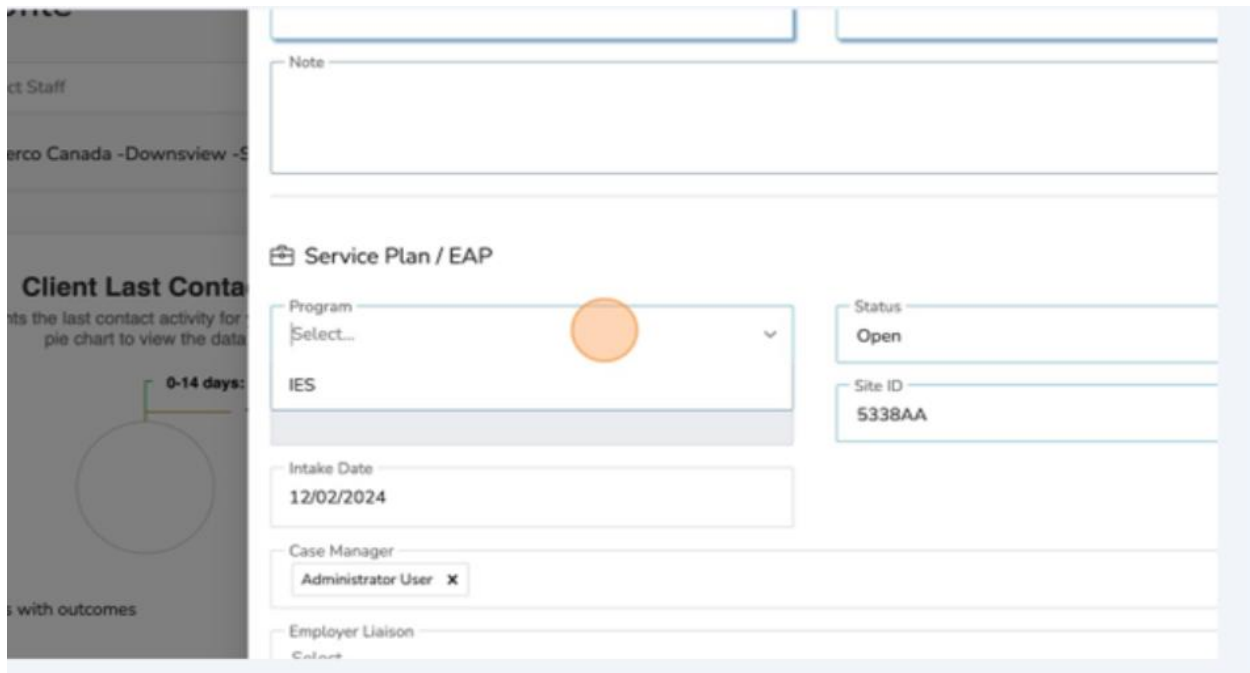
5. Click "Last Name."



The screenshot shows a 'Client' form window with a close button (X) in the top right corner. The form is divided into sections: 'Client Info' and 'Plan / EAP'. In the 'Client Info' section, there are two input fields. The second field is labeled 'Last Name' and has an orange circle highlighting it. Below this, there is a large empty text area. In the 'Plan / EAP' section, there are several fields: 'Number / EAP', 'Status' (with a dropdown menu showing 'Open'), 'Site ID' (with a dropdown menu showing '3789A'), and another dropdown menu. To the right of the form, there are two 'Settings' buttons.

6. Enter the client's last Name.

7. Click the "Service Plan/EAP."



The screenshot shows a 'Service Plan / EAP' form. At the top, there is a 'Note' field. Below it, the 'Service Plan / EAP' section contains several fields: 'Program' (a dropdown menu with 'Select...' and 'IES' options, highlighted with an orange circle), 'Status' (a dropdown menu showing 'Open'), 'Site ID' (a dropdown menu showing '5338AA'), 'Intake Date' (a text field showing '12/02/2024'), 'Case Manager' (a dropdown menu showing 'Administrator User'), and 'Employer Liaison' (a text field). On the left side, there is a sidebar with a 'Client Last Contact' section, which includes a pie chart and a '0-14 days' label.

8. Select "IES."

Note

Service Plan / EAP

Program  
Select...  
IES

Status  
Open

Site ID  
5338AA

Intake Date  
12/02/2024

Case Manager  
Administrator User X

Employer Liaison  
Select...

Client Last Contact

0-14 days:

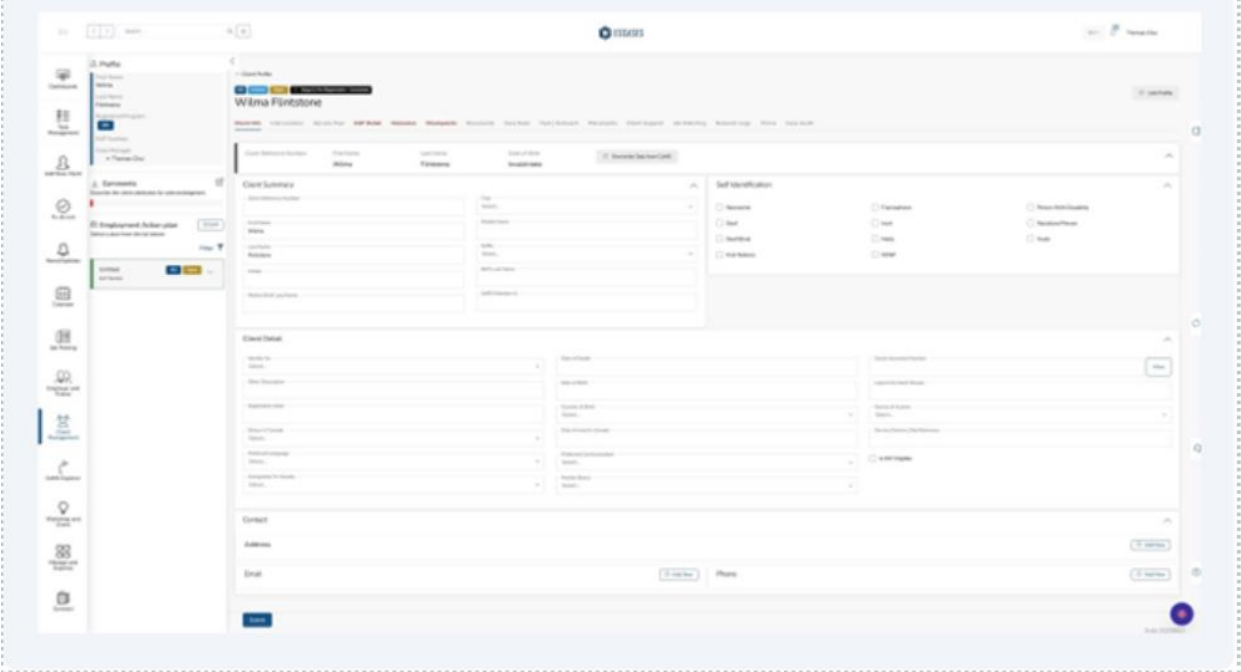
❖ Tip: Leave the "Status" option as open. The "Site ID" field can also be left with the default value as the system will auto-populate with your Site ID.

9. Select "Submit."

Submit

Cancel

You have successfully added a new client profile.



## (5) Navigation

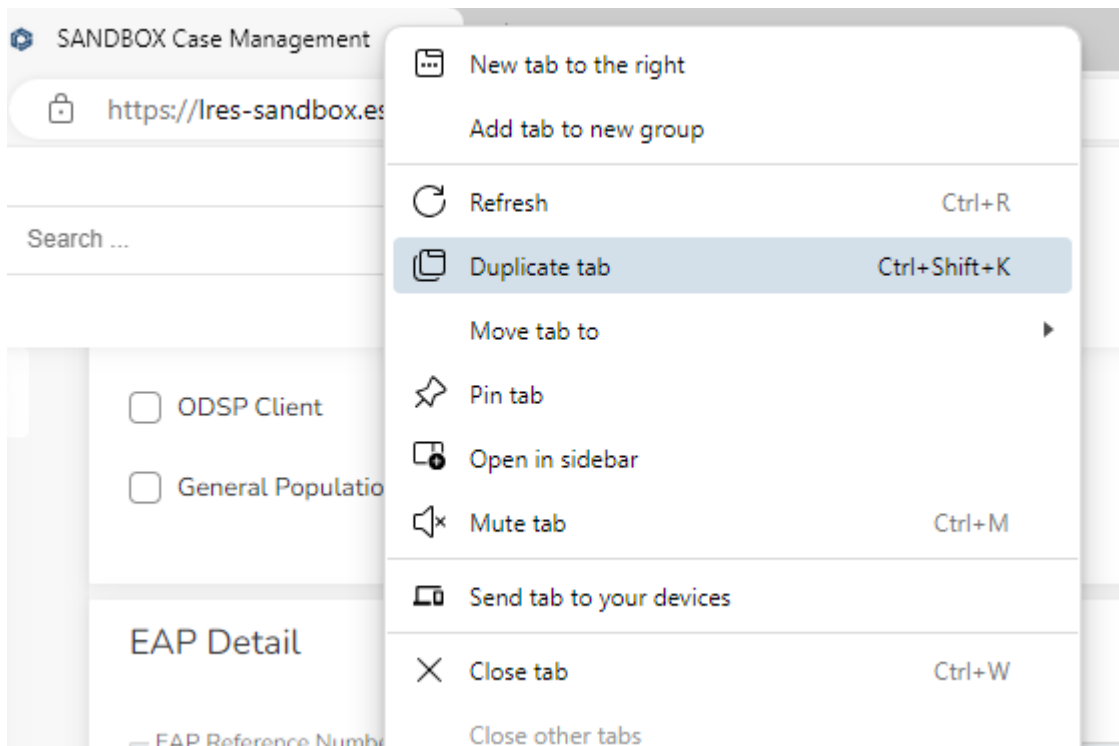
### Duplicate Tabs

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

The screenshot displays the ESCases software interface for a user named Wilma Finstone. The interface features a sidebar on the left with navigation icons and a main content area with several tabs. The tabs are color-coded: 'Client Summary' (red), 'Client Details' (grey), and 'Contact' (grey). The 'Client Summary' tab is active, showing fields for Name, Address, and other client information. The 'Client Details' tab is also visible, showing fields for Date of Birth, Gender, and other personal details. The 'Contact' tab shows fields for Address and Email. The interface includes a search bar at the top, a navigation menu on the left, and a 'Submit' button at the bottom right.

**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.



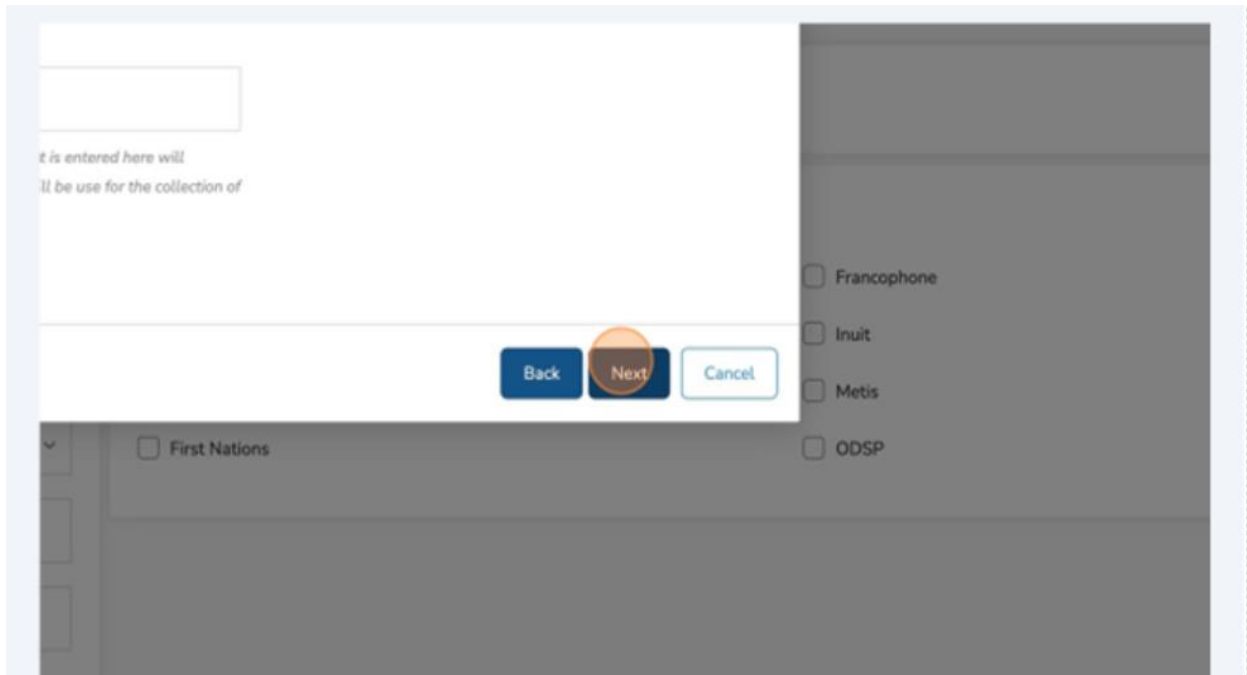


This screenshot shows a web form with a progress indicator at the top consisting of four circles. The first circle is filled with blue, while the others are grey. Below the progress bar is a light blue informational box containing the following text: "You are attempting to link this client's profile to that in CaMS. This will download all the CaMS information with the given Client Reference Number and save it under this client. Please go through all the steps to understand and agree to how the data will be downloaded and saved. If everything is correct, click 'Link Profile' to finalize the link." Below this box is a text input field labeled "Client Reference Number". The field is currently empty. A red error message box is overlaid on the field, stating "Client Reference Number is required". Below the field, there is a line of text: "The Client Reference Number that is entered here will overwrite the client record and will be used for the collection of CaMS Data." At the bottom of the form, there is a "First Nations" checkbox which is currently unchecked.

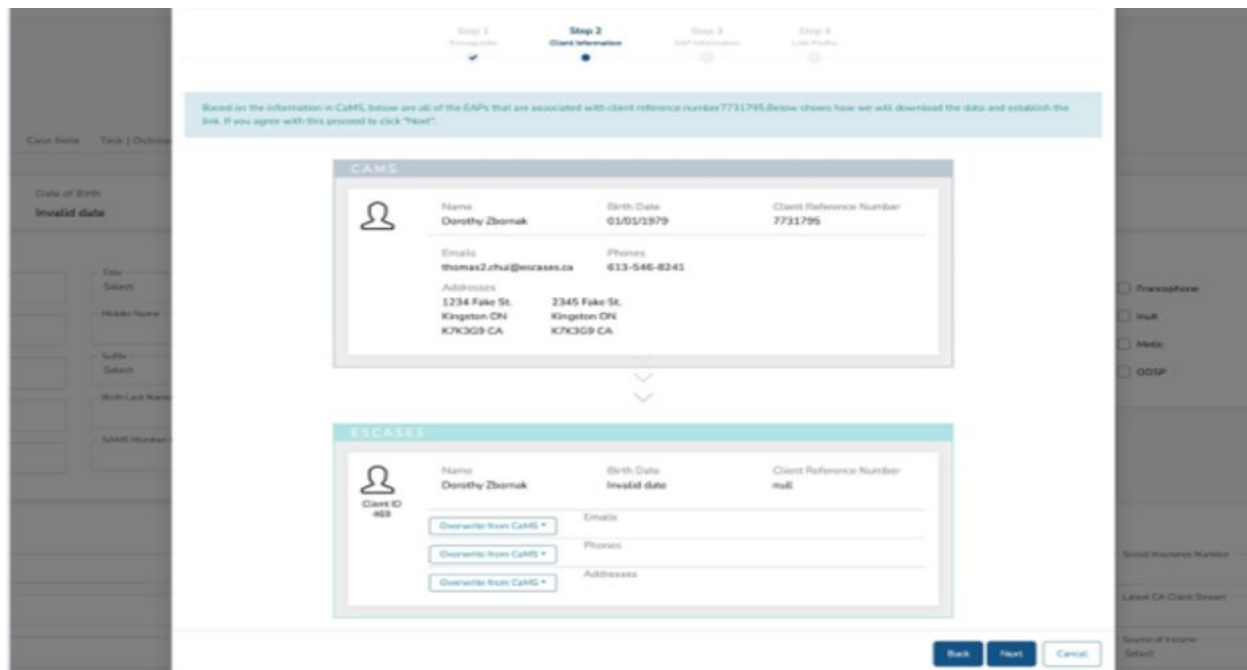
4. Insert the "Client Reference Number" from CaMS.

This screenshot shows the same web form as above, but now the "Client Reference Number" field contains the value "7731795". The progress indicator at the top now shows the first circle as filled with blue and the second circle as filled with grey, indicating that the user has moved to Step 2. The informational box and the text below the field remain the same. At the bottom right of the form, there are two buttons: a "Back" button and a "Next" button.

5. Click "Next."



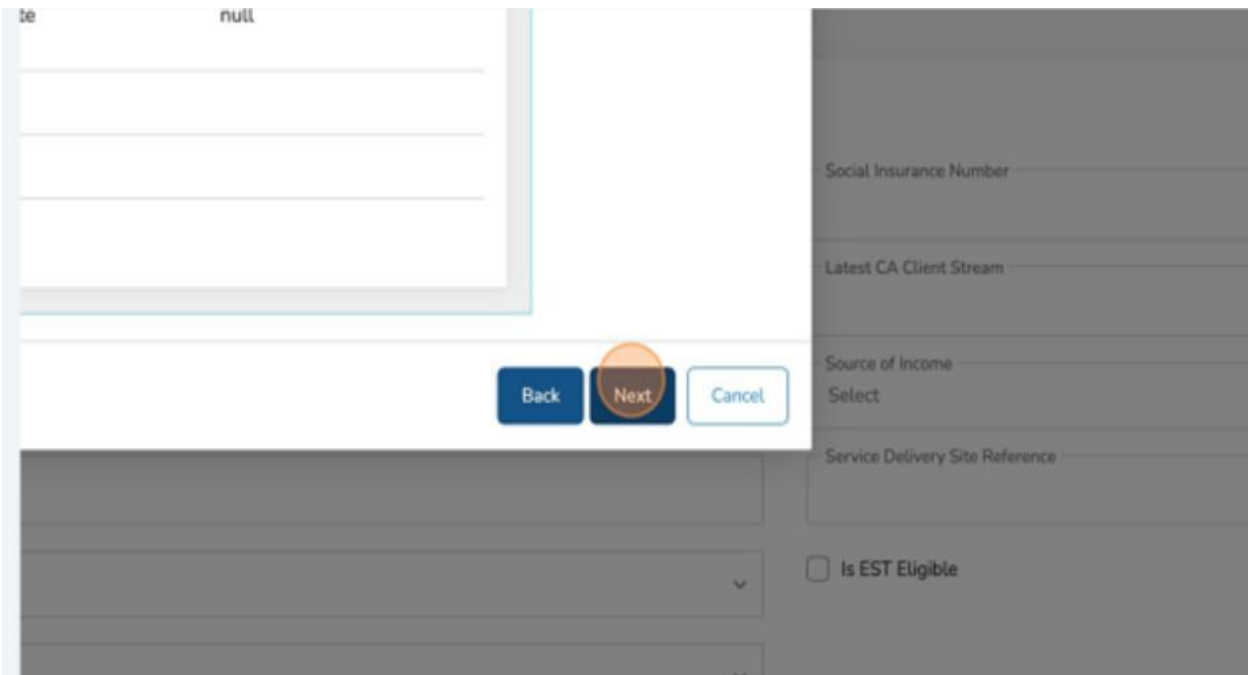
6. Select which data to download from CaMS.



- ❖ 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.”

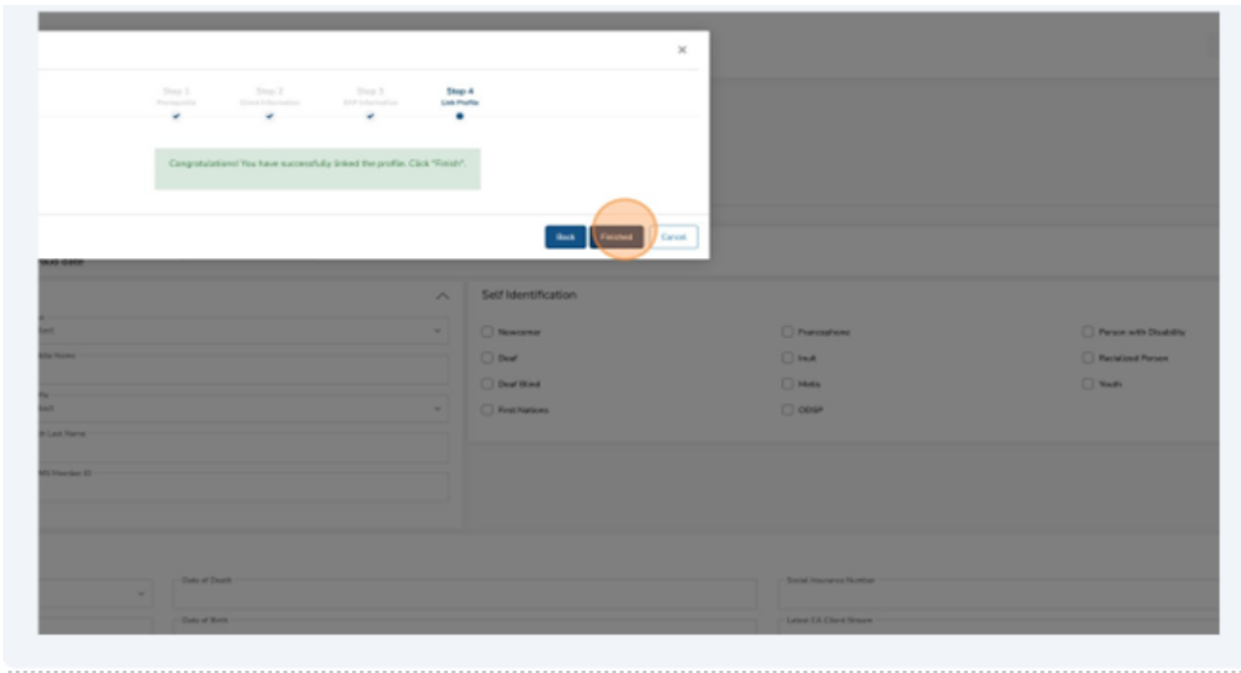
A screenshot of a software interface. On the left, there is a white modal window with a light blue border. Inside this window, there are three horizontal lines for text input. At the bottom of the modal window, there are three buttons: 'Back' (dark blue), 'Next' (dark blue with an orange circle highlight), and 'Cancel' (light blue). The background of the interface is a dark grey form with several fields. Visible fields include 'Social Insurance Number', 'Latest CA Client Stream', 'Source of Income' (with a 'Select' dropdown), and 'Service Delivery Site Reference'. There is also a checkbox labeled 'Is EST Eligible'.

### Review the EAP Details

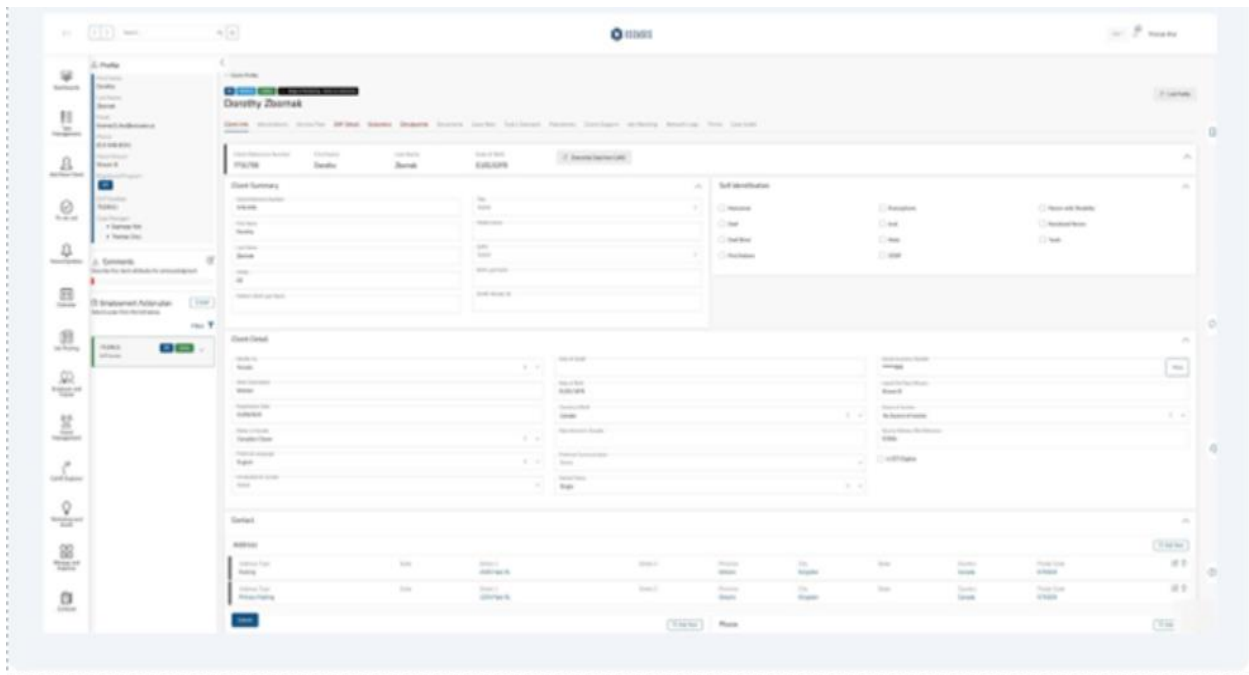
- ALERT! The next phase of linking a profile with CaMS addresses all EAPs found in CaMS - this includes closed and active EAPs.
- By default, any active EAP found in CaMS will overwrite any active IES EAP found in ESCases (case notes are still retained from ESCases when such an overwrite takes place).
- 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."



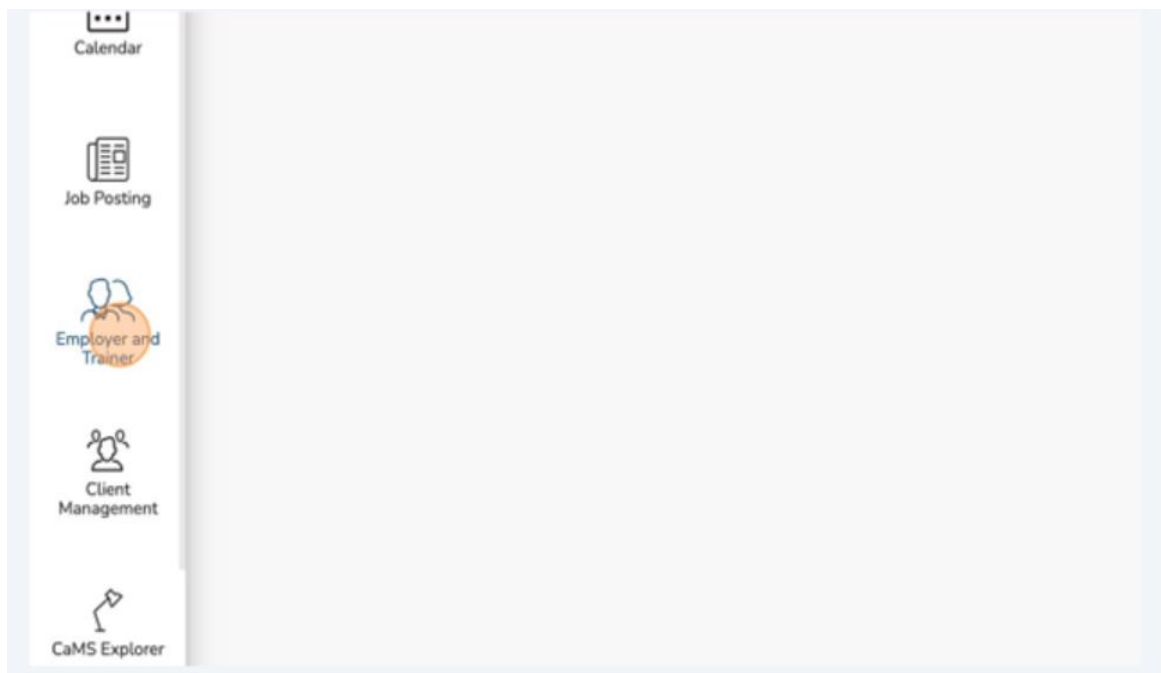
9. You have now successfully linked a client profile with CaMS.



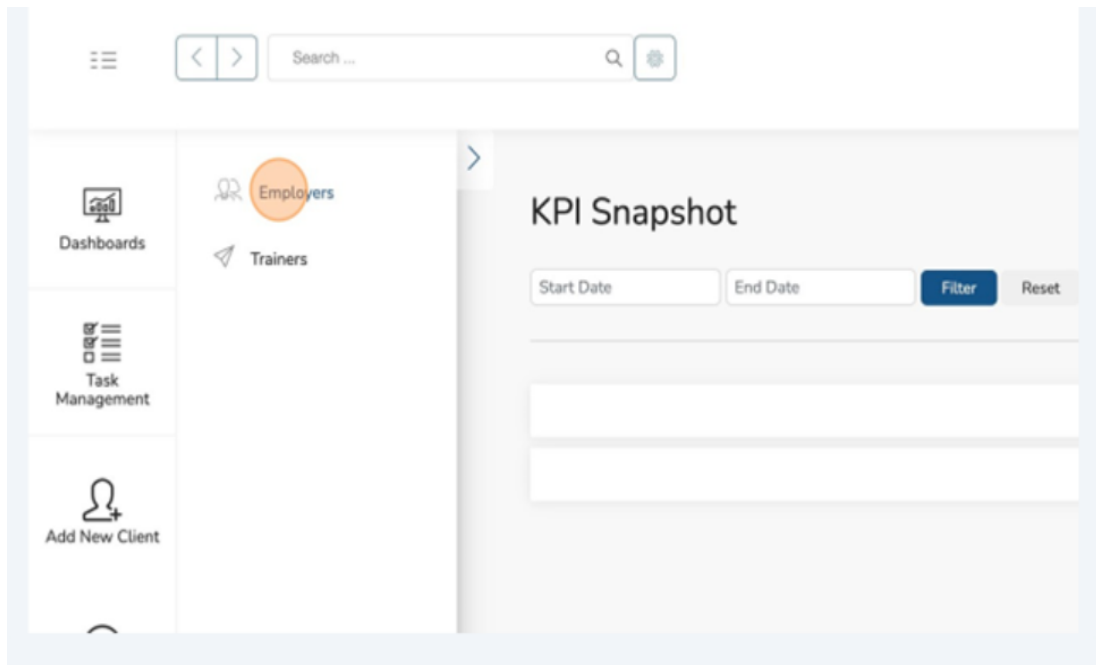
## (7) Add a New Employer

- 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.

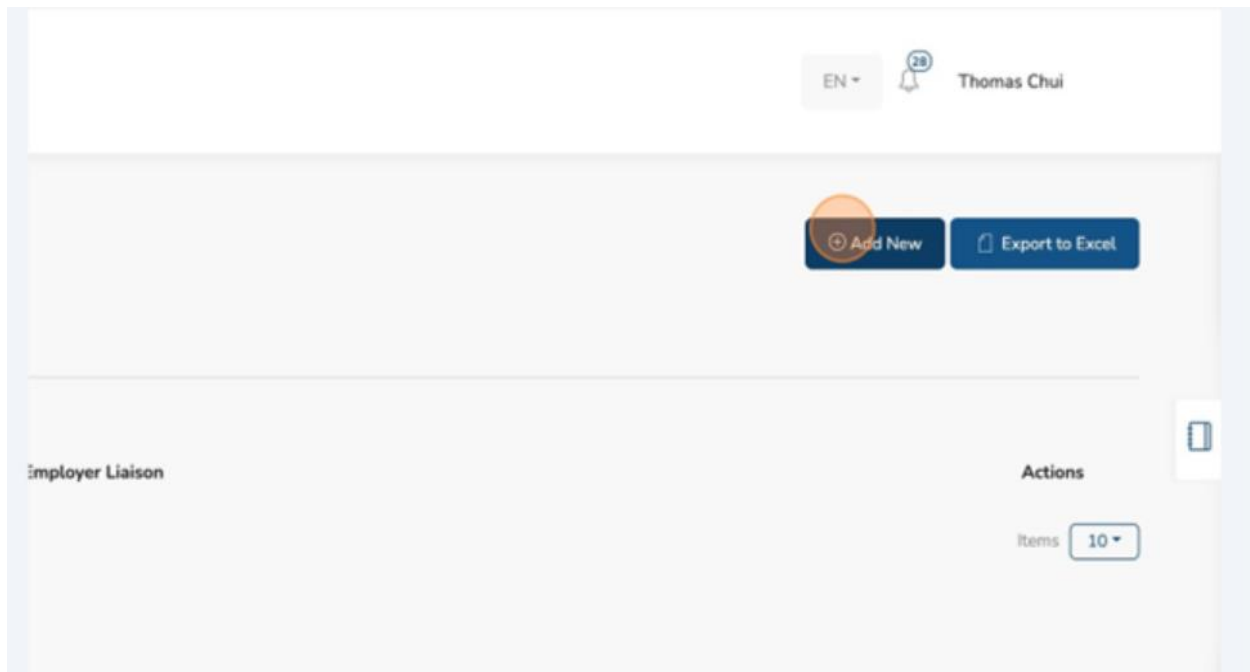
1. Navigate to ESCases navigation bar.
2. Click “Employer and Trainer” in the left Navigation window.



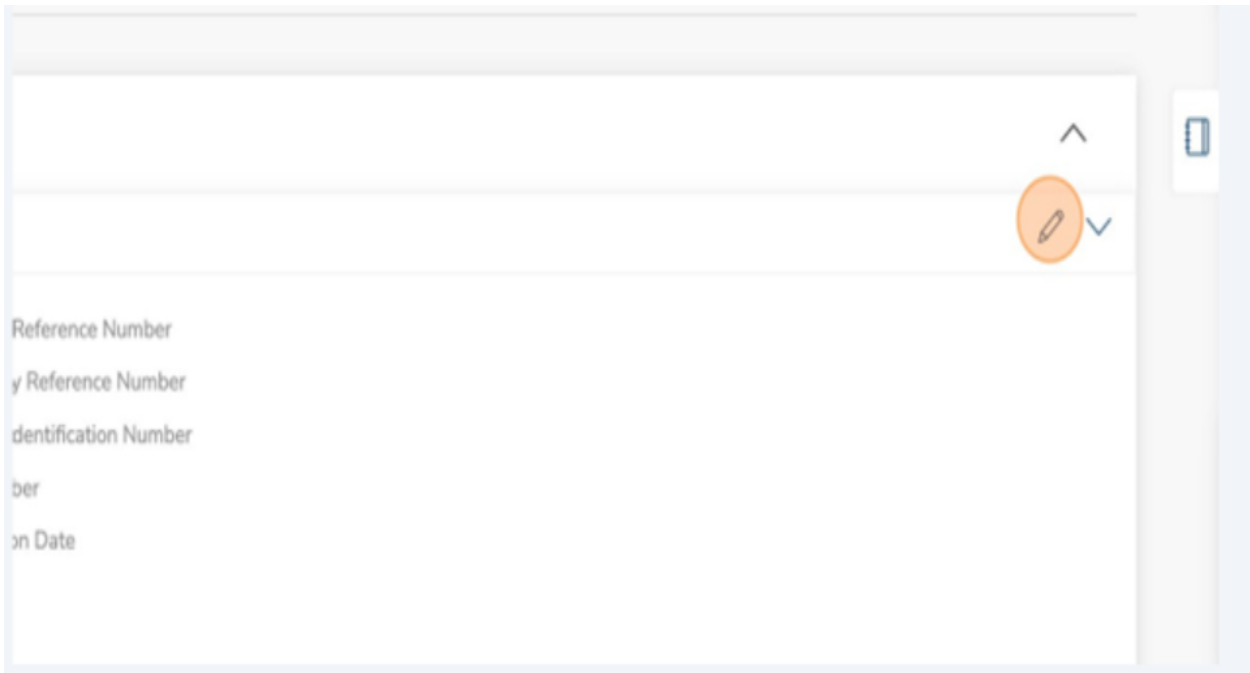
3. Click “Employers.”



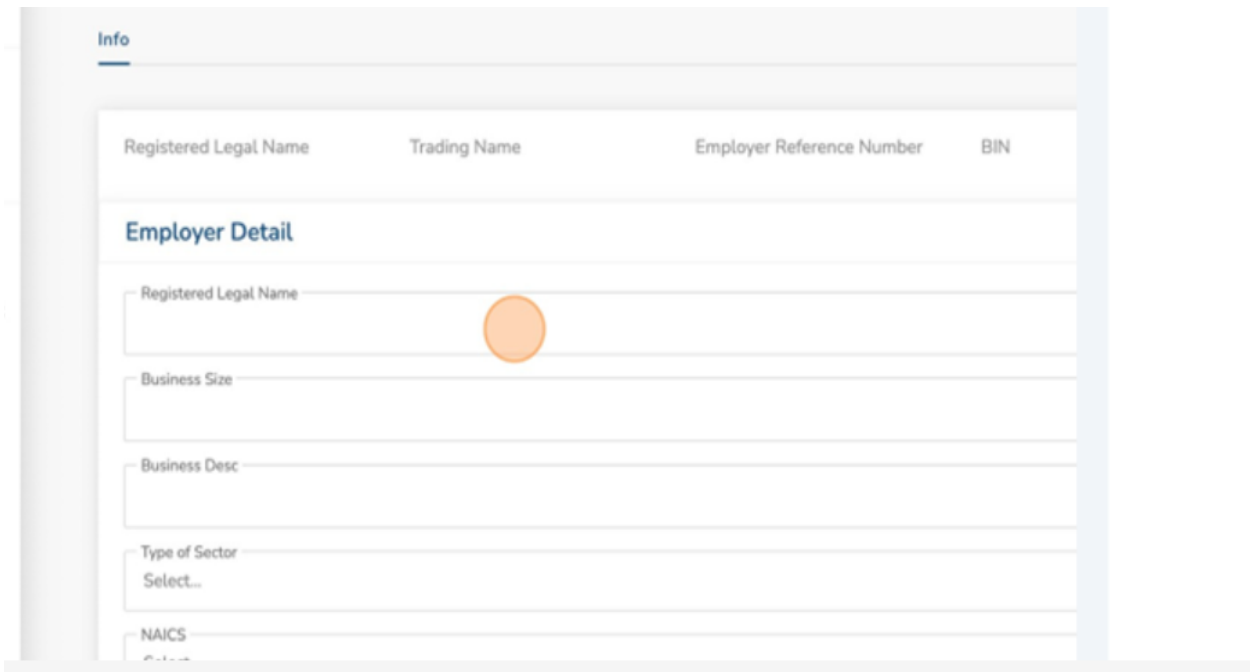
4. Click “Add New.”



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."

Job Posting

Employer and Trainer

Client Management

CaMS Explorer

Workshop and Event

Assign to

Users  
Select...

Submit

You have now successfully created a new employer profile.

Employer

Employer Detail

Name

Address

Phone

Email

Contact

Address

Email

Phone

Assign to

Submit





## (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.

Employer Search

   
\* required field

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

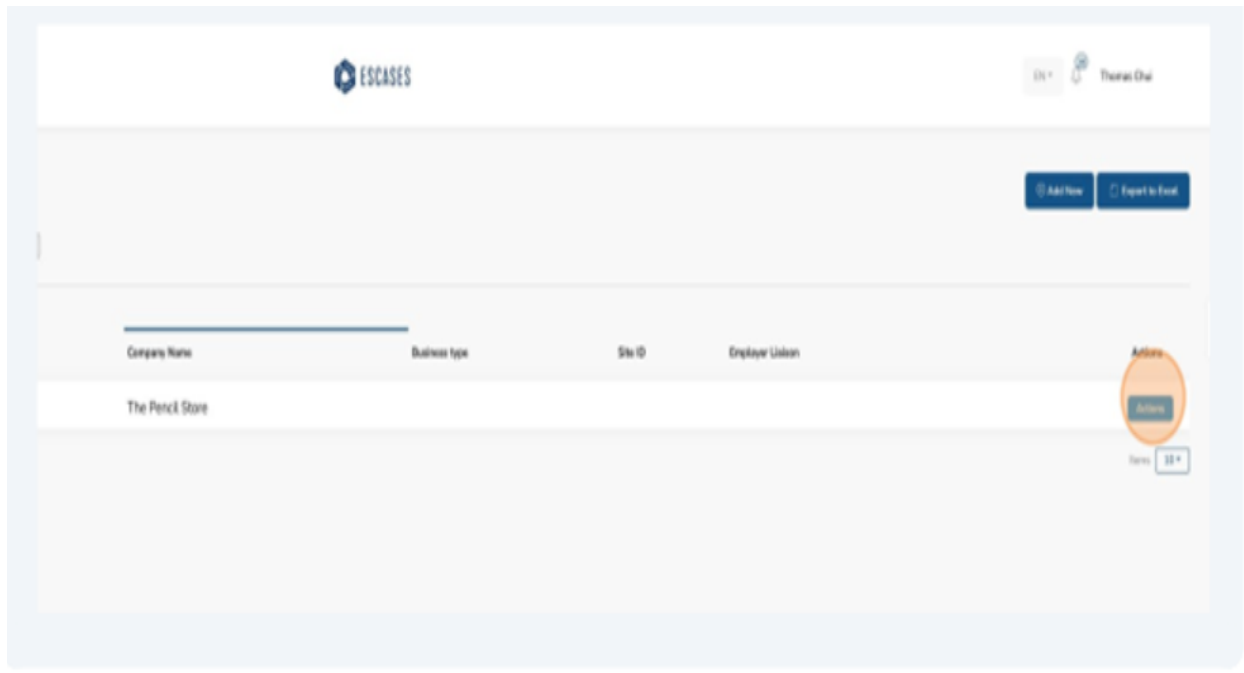
Search Results (Number of Items: 4 out of 4) ▼

Case Reference	Employer Reference Number	Trading / Business Name	Registered / Legal Name	Business City	Last Updated	Trading Status
.....	.....	.....	.....	.....	18/04/2023	.....

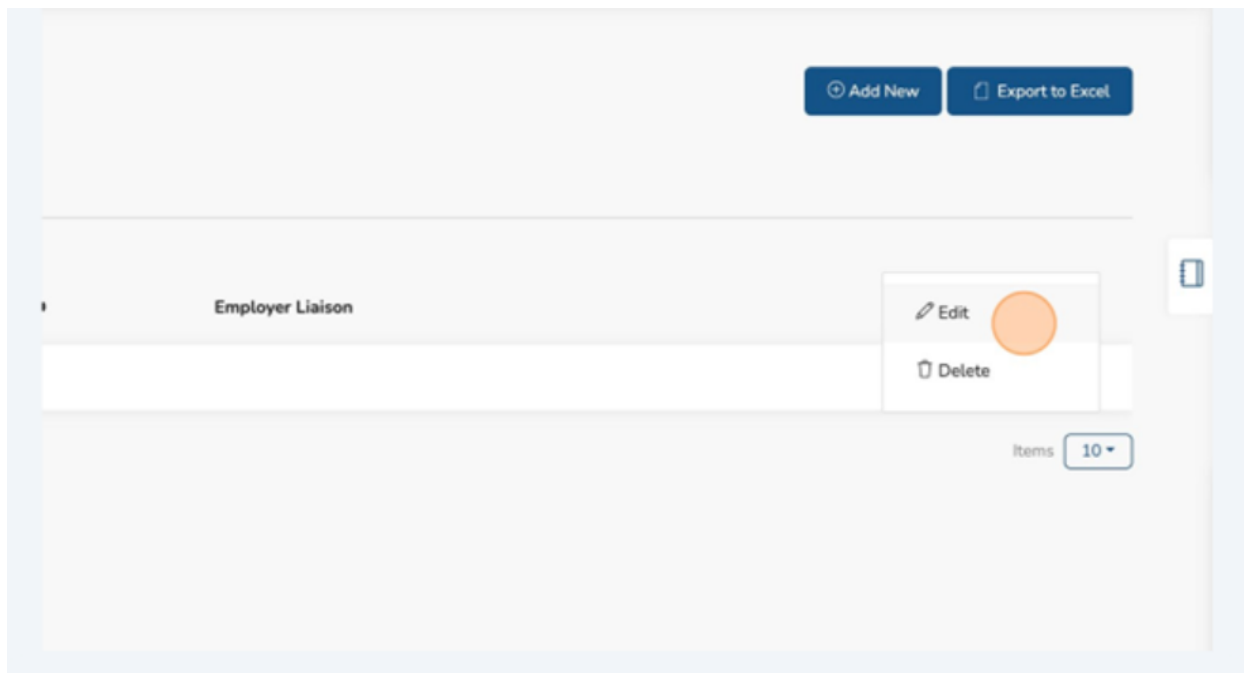
- Alert! A new version of this is currently being developed and should be live in Q2 of 2024 where full two-way syncing will be implemented.

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

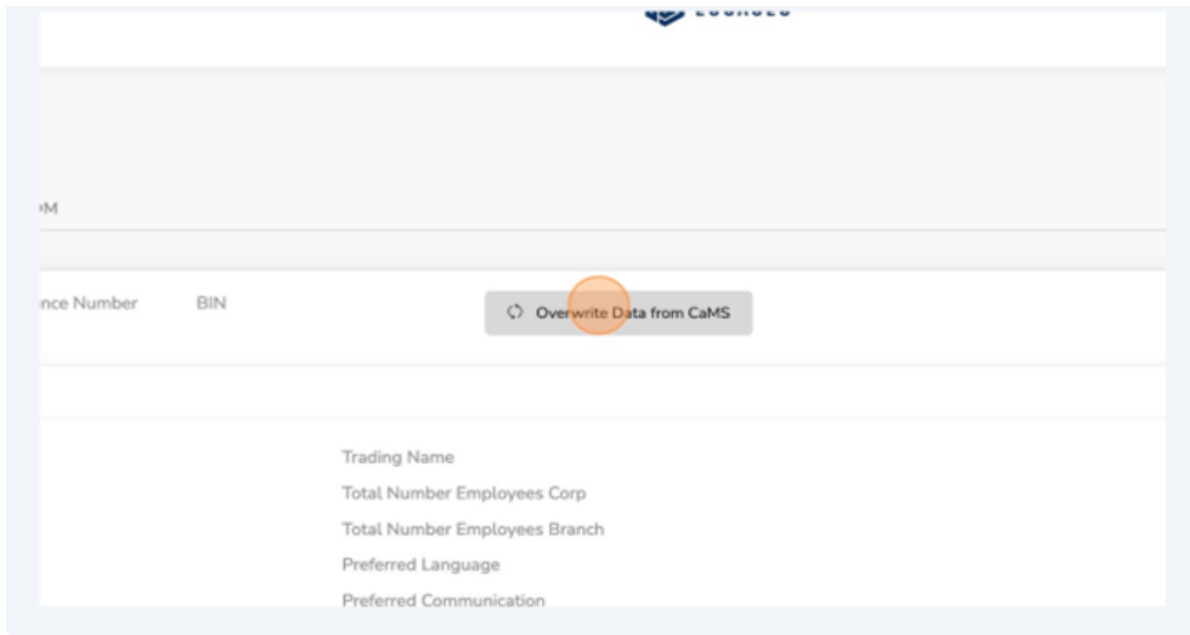
1. Click "Actions."



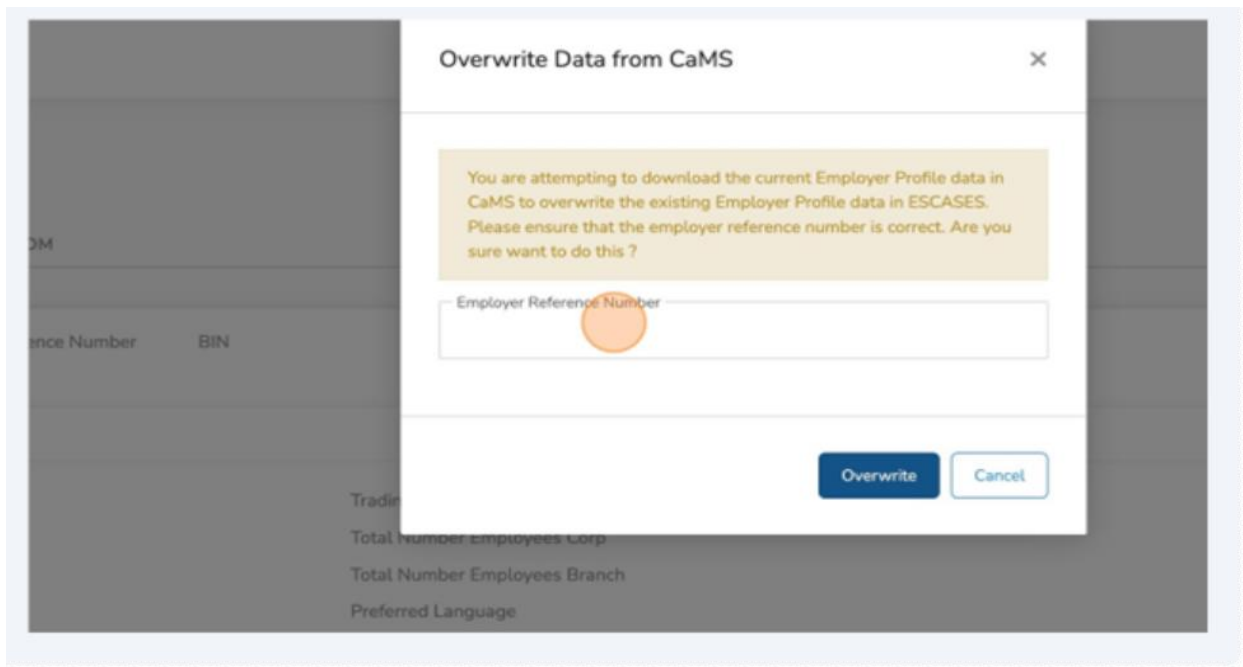
2. Click "Edit."



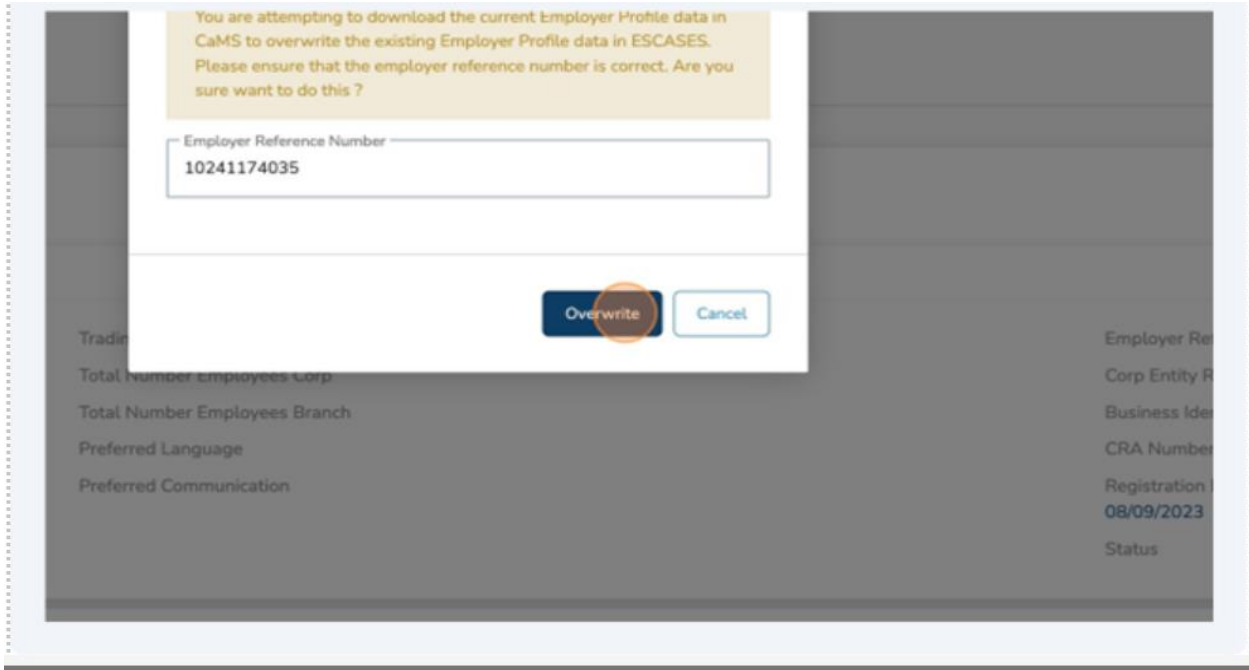
3. Click "Overwrite Data from CaMS."



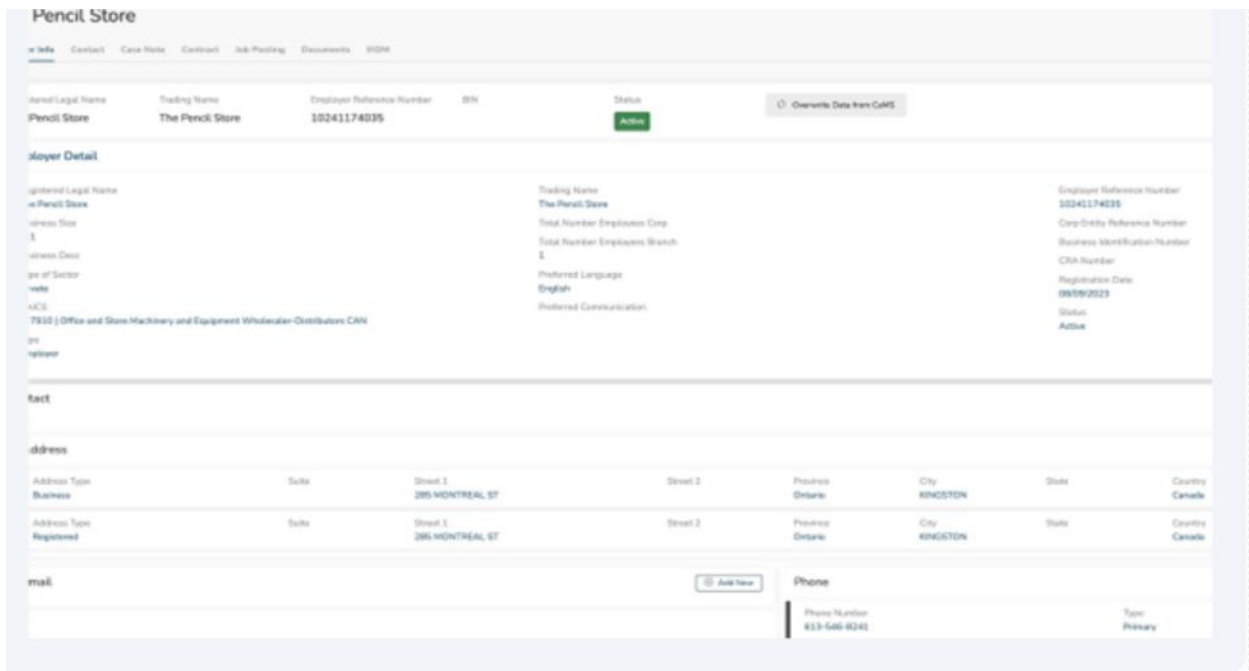
4. Click "Employer Reference Number."



5. Click "Overwrite."



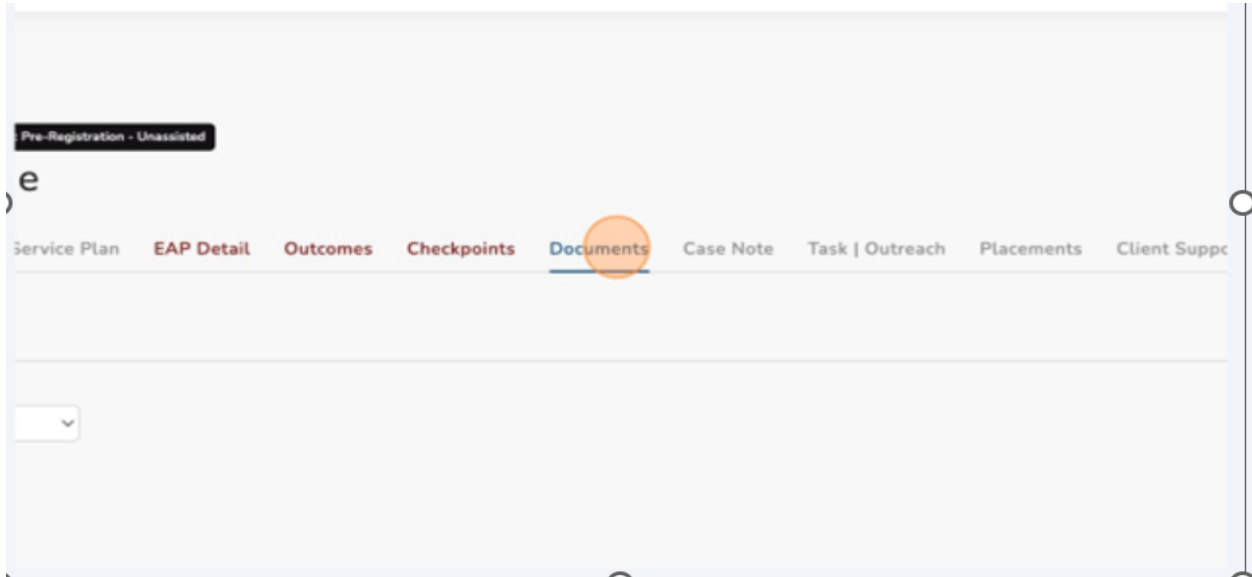
You have successfully linked the employer's profile with CaMS.



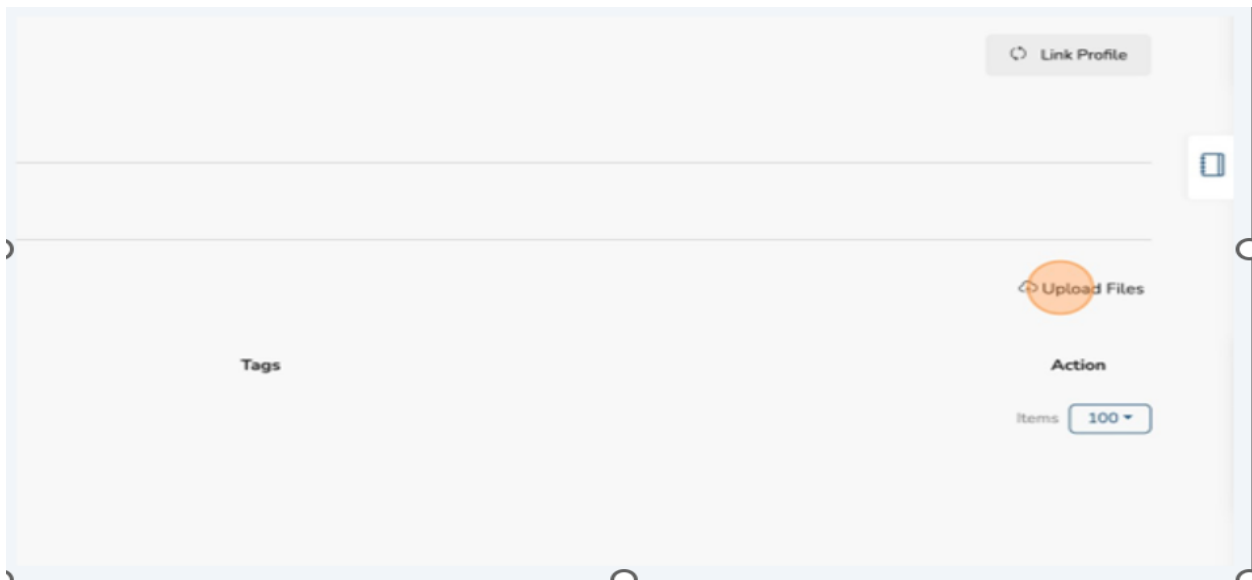
- Alert! Ministry APIs dictate that employer profiles in CaMS are not continuously synced with ESCases. Changes made in ESCases do not reflect in CaMS. If you want to update an employer profile, please do so in CaMS and repeat Step 4 onward from the above steps to update the changes in ESCases.
  
-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

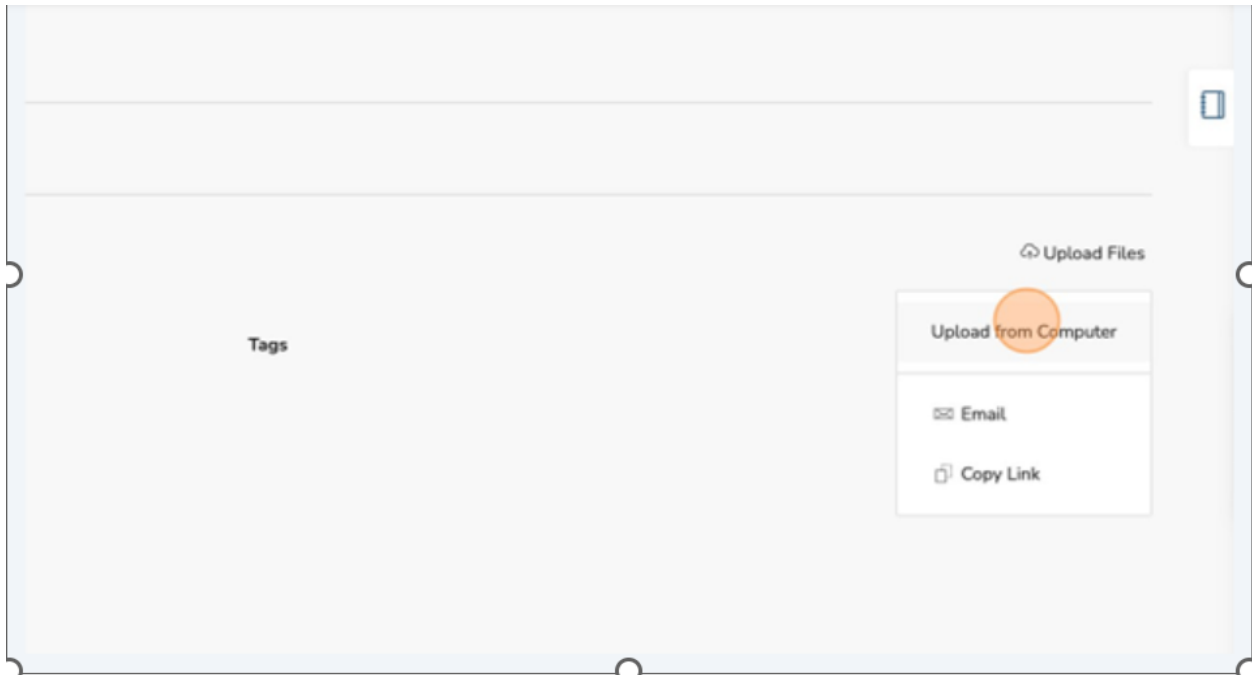
1. Navigate to the Client profile.
2. Click "Documents."



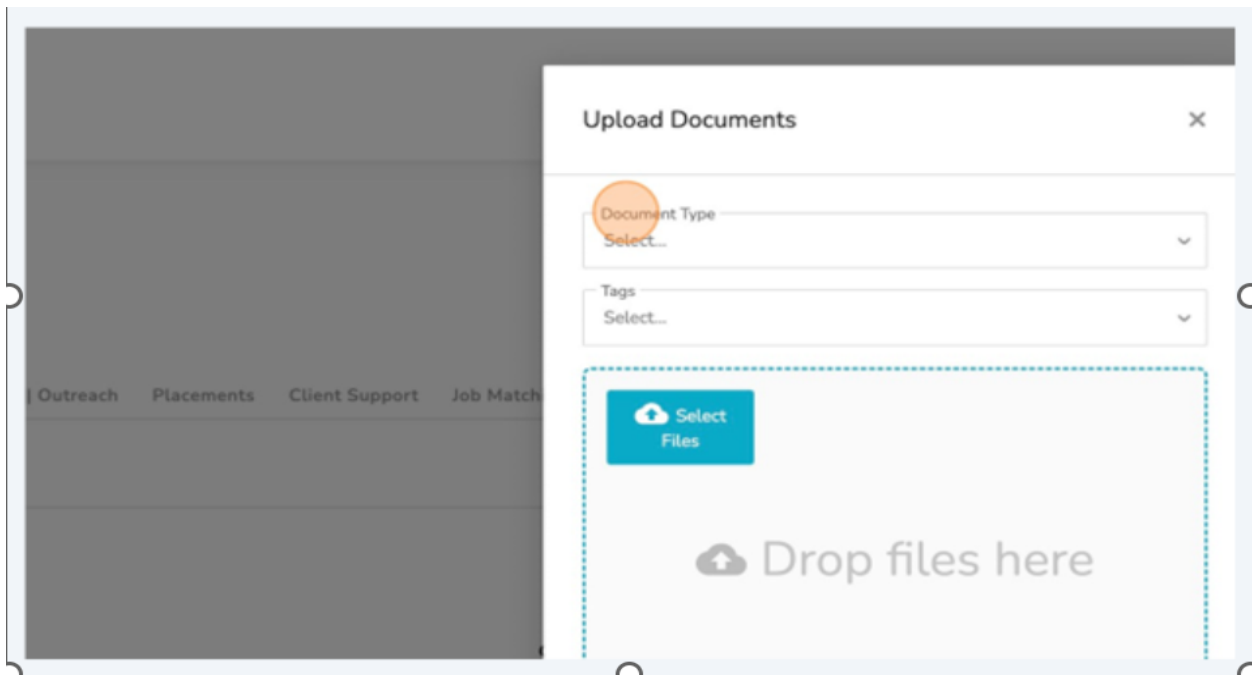
3. Click "Upload Files."



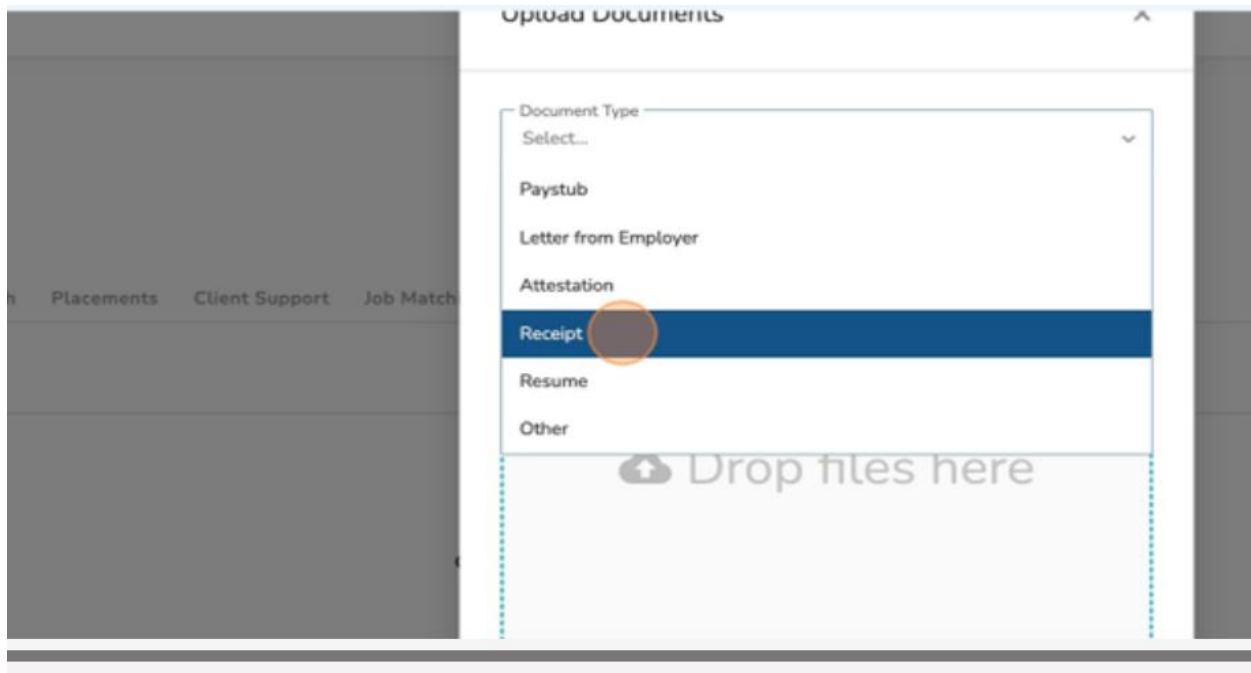
4. Click "Upload from Computer."



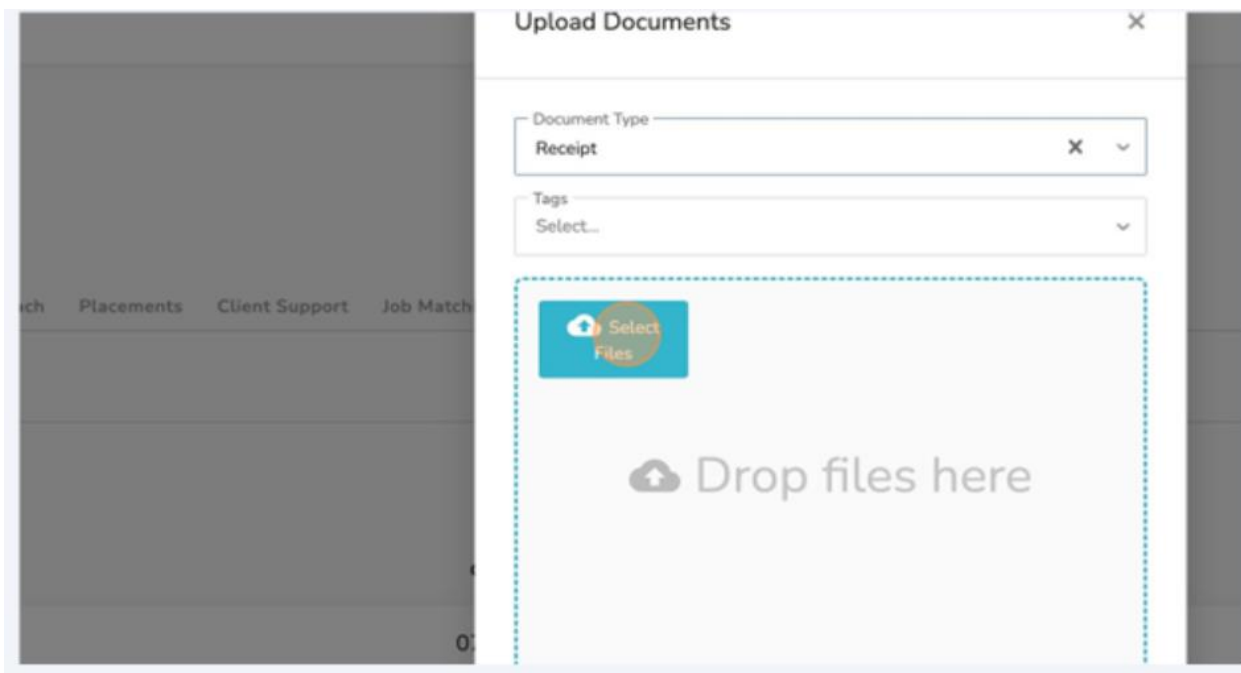
5. Click "Document Type."



6. Select the appropriate document type.

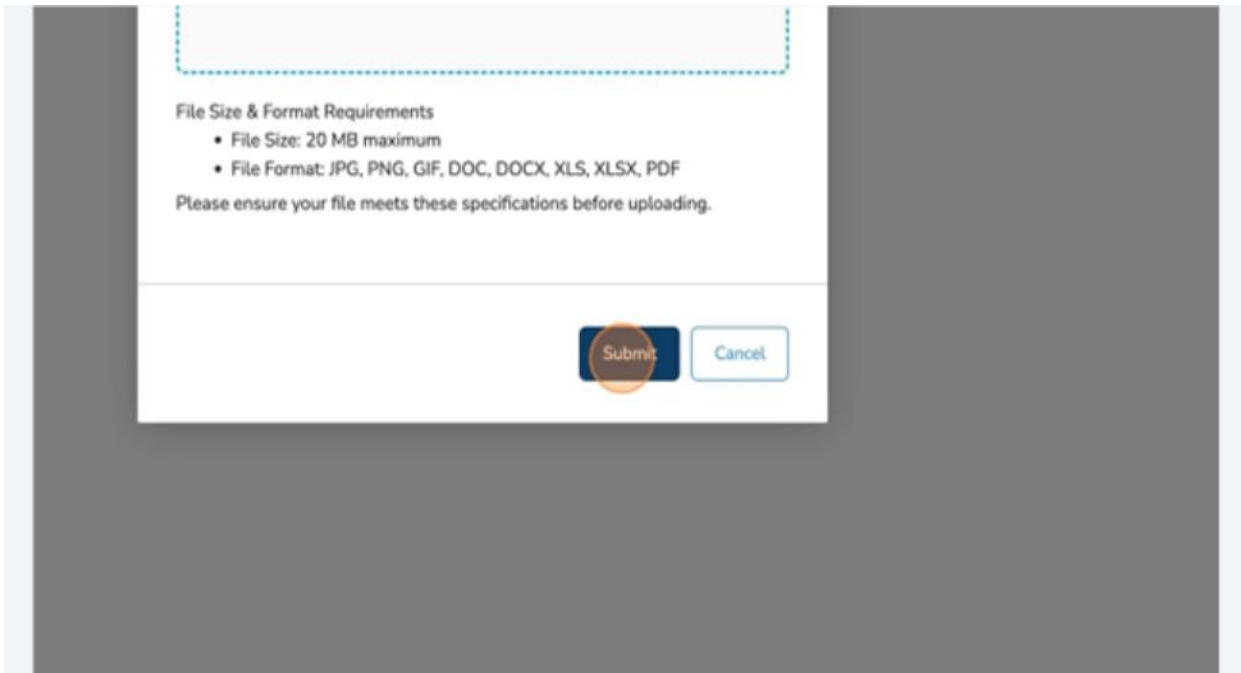


7. Click "Select Files" and choose the appropriate file from your computer.

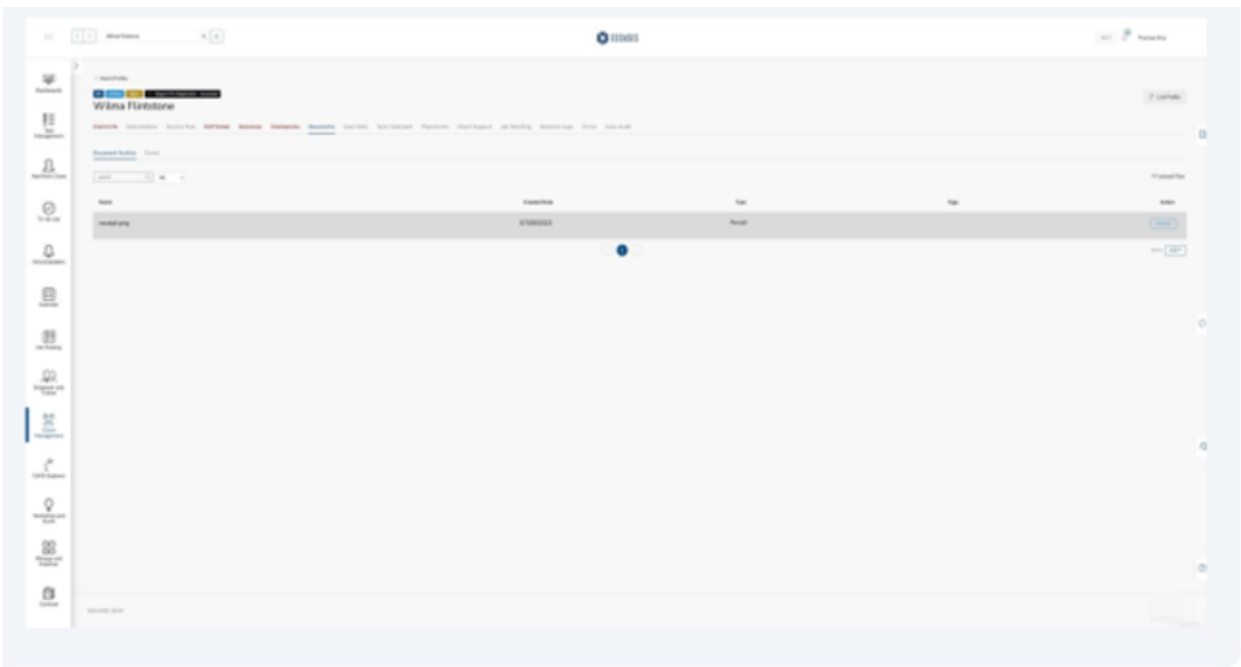




8. Click "Submit."



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

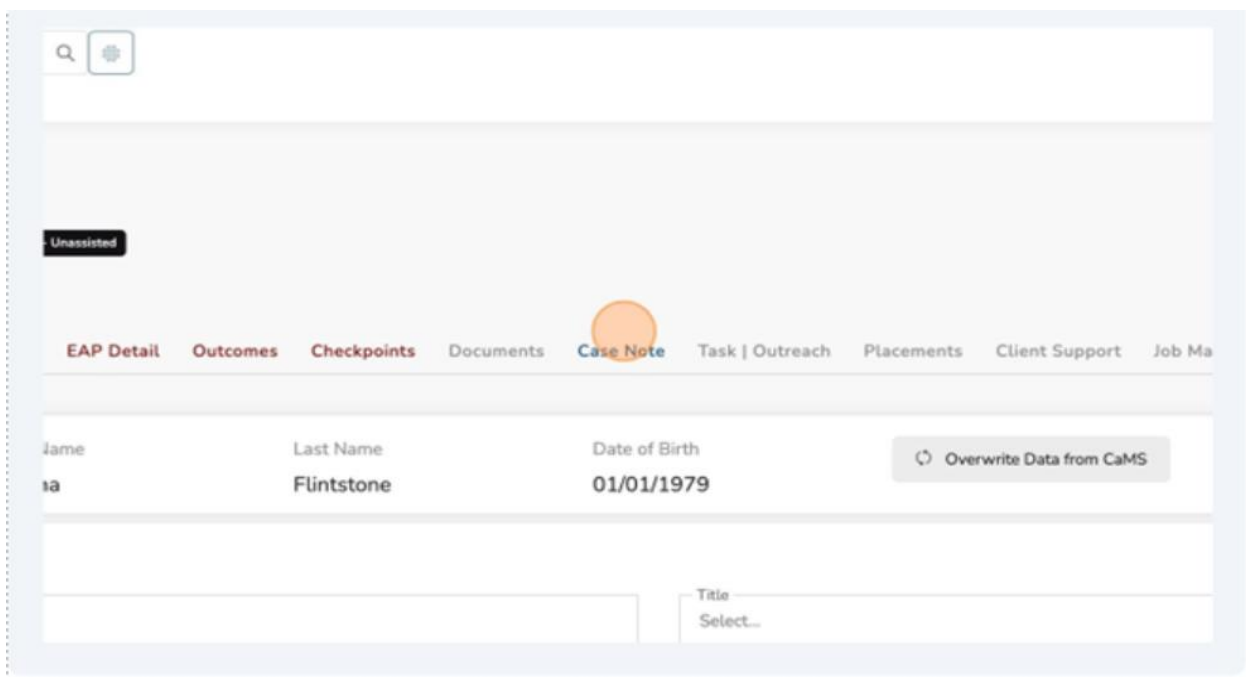


## (10) Add a New Case Note

- ❖ 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."

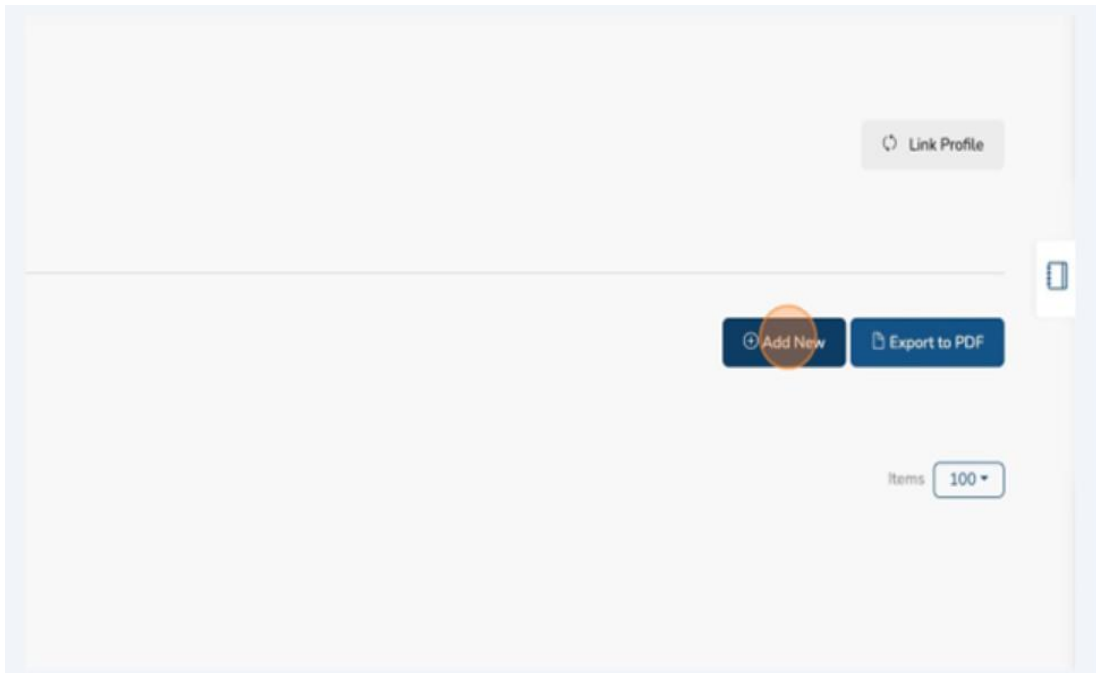


The screenshot shows a client profile page with a navigation bar at the top. The 'Case Note' tab is highlighted with an orange circle. Below the navigation bar, there is a table with client information and a 'Title' dropdown menu.

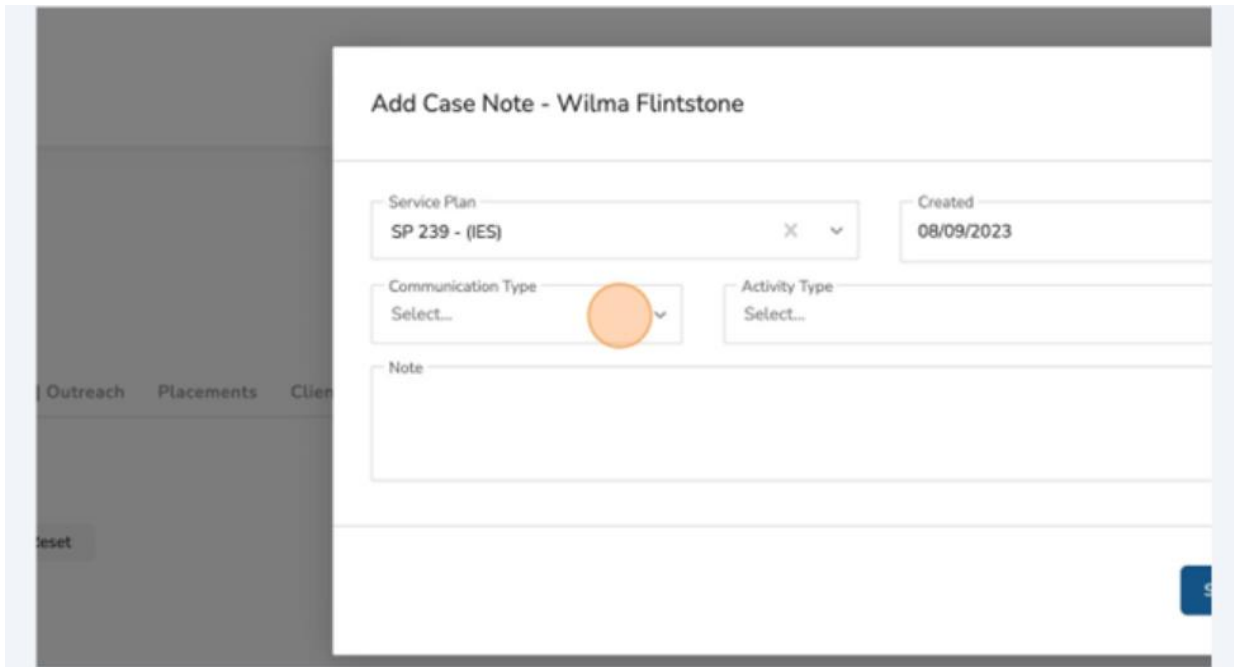
Name	Last Name	Date of Birth	Action
James	Flintstone	01/01/1979	<a href="#">Overwrite Data from CaMS</a>

Title  
Select...

3. Click "Add New."



4. Select "Communication Type."



5. Select the appropriate “Communication Type.”

The screenshot shows a web form titled "Add Case Note - Wilma Flintstone". At the top, there are two input fields: "Service Plan" with the value "SP 239 - (IES)" and "Created" with the value "08/09/2023". Below these are two dropdown menus: "Communication Type" and "Activity Type". The "Communication Type" dropdown is open, displaying a list of options: "Note", "Email", "Phone", "Text", "Virtual", and "In-Person". The "Note" option is highlighted in blue, and an orange circle is drawn around it. The "Activity Type" dropdown is currently closed and shows "Select...".

6. Click “Activity Type.”

The screenshot shows the same "Add Case Note - Wilma Flintstone" form. The "Communication Type" dropdown is now closed and shows "Note" with an "X" icon. The "Activity Type" dropdown is open, displaying a list of options: "Apprenticeship", "Arrange for Support", "Attended Interview/Update", "Career Coaching", "Career Exploration", "Communication/Advocacy (OW/ODSP)", and "Cover Letter". An orange circle is drawn around the "Activity Type" dropdown menu.

7. Select the appropriate “Activity Type.”

The screenshot shows a form with the following fields:

- Service Plan: SP 239 - (IES)
- Created: 08/09/2023
- Communication Type: (empty)
- Activity Type: (dropdown menu open)

The dropdown menu for Activity Type is open, showing the following options:

- Select...
- Follow-Up
- General Update/ Follow up
- Goal setting** (highlighted with a blue bar and an orange circle)
- Help with forms & computer
- Intake/Needs Assessment
- Interview Prep
- Interview Techniques
- JCP

8. Click the “Note” field.

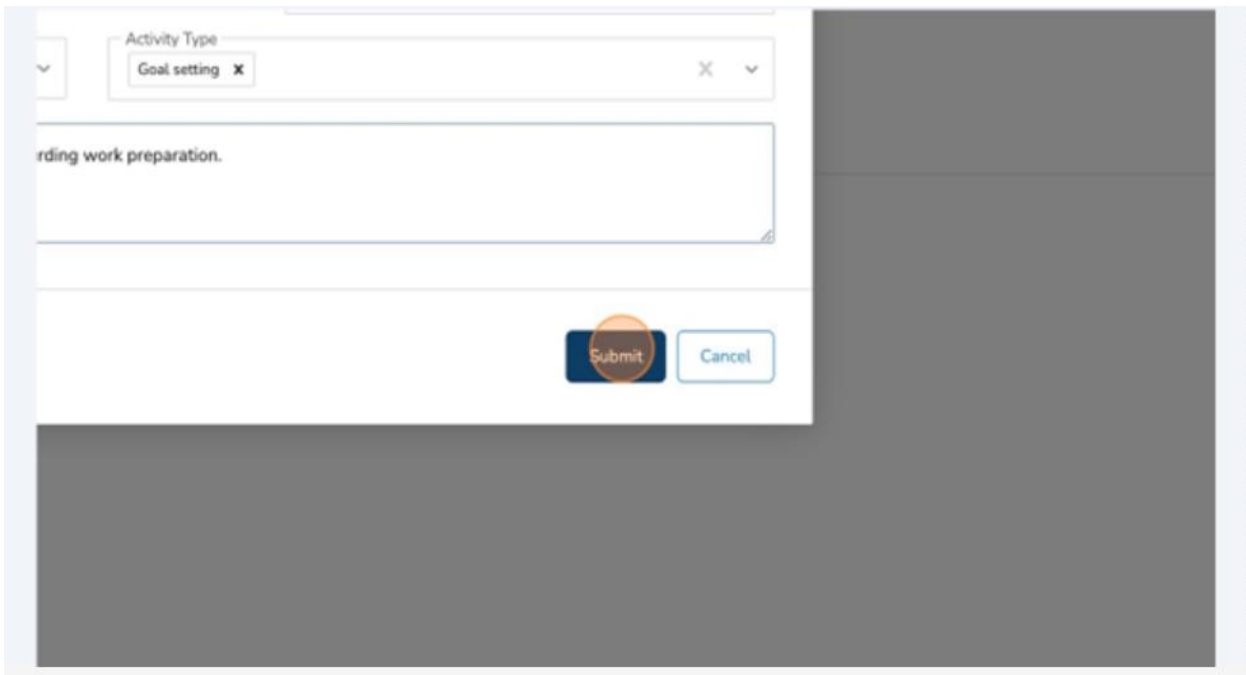
The screenshot shows the form with the following fields:

- Service Plan: SP 239 - (IES)
- Created: 08/09/2023
- Communication Type: Note
- Activity Type: Goal setting
- Note: (text area highlighted with an orange circle)

A "Reset" button is visible in the bottom left corner of the form.

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

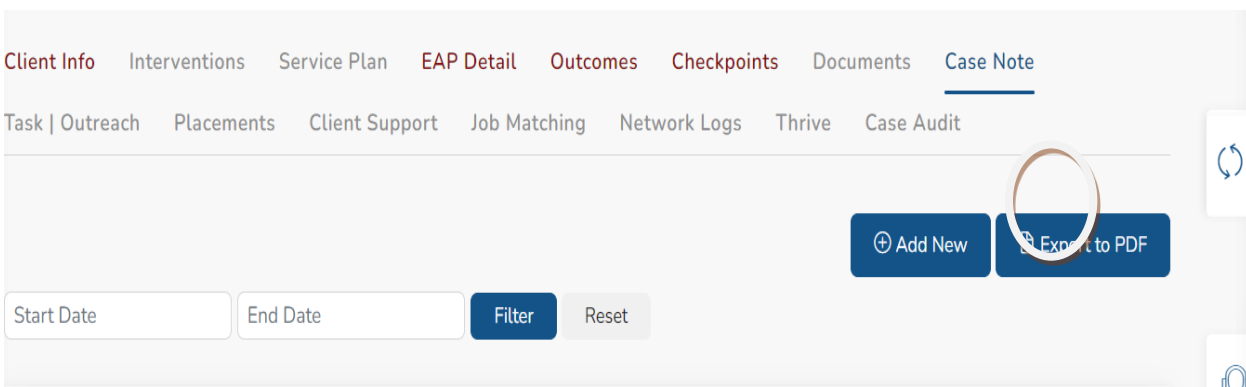
10. Click “submit.”

A screenshot of a web application form for creating a new note. At the top, there is a dropdown menu labeled "Activity Type" with "Goal setting" selected. Below this is a text input field containing the text "rding work preparation.". At the bottom of the form, there are two buttons: "Submit" (highlighted with a red circle) and "Cancel".

You have now successfully created a new note.

To print a list of notes:

1. Click “Export to PDF.”

A screenshot of a dashboard interface. The top navigation bar includes tabs for "Client Info", "Interventions", "Service Plan", "EAP Detail", "Outcomes", "Checkpoints", "Documents", and "Case Note" (which is underlined). Below this, there are more tabs: "Task | Outreach", "Placements", "Client Support", "Job Matching", "Network Logs", "Thrive", and "Case Audit". In the bottom right area, there are two buttons: "Add New" and "Export to PDF" (highlighted with a red circle). Below the buttons, there are input fields for "Start Date" and "End Date", followed by "Filter" and "Reset" buttons.

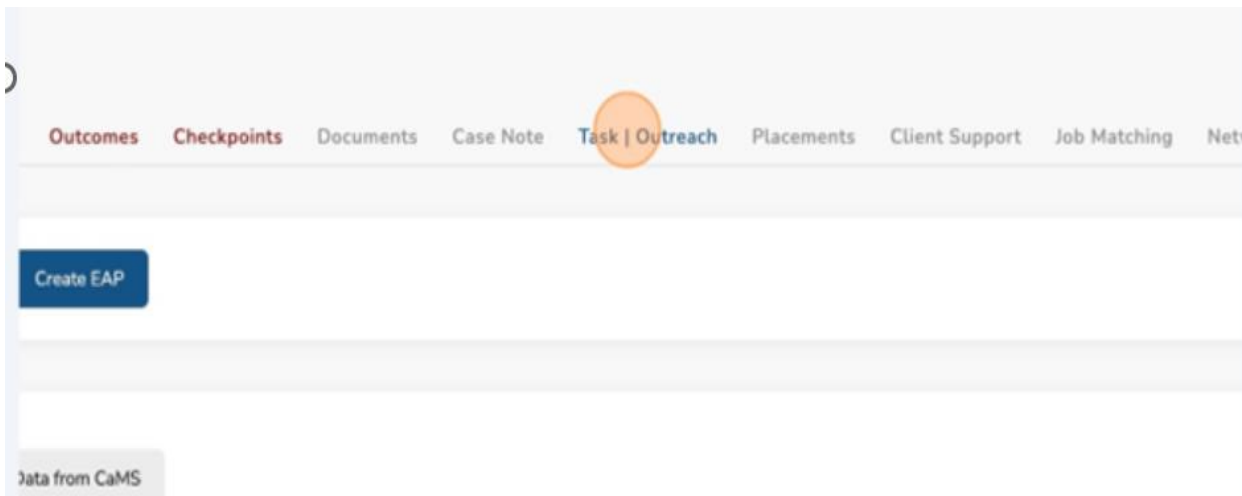
- Under “Downloads” Select “Open File.”
- A list of Case Notes for the client will be displayed.

## (11) Add a Task

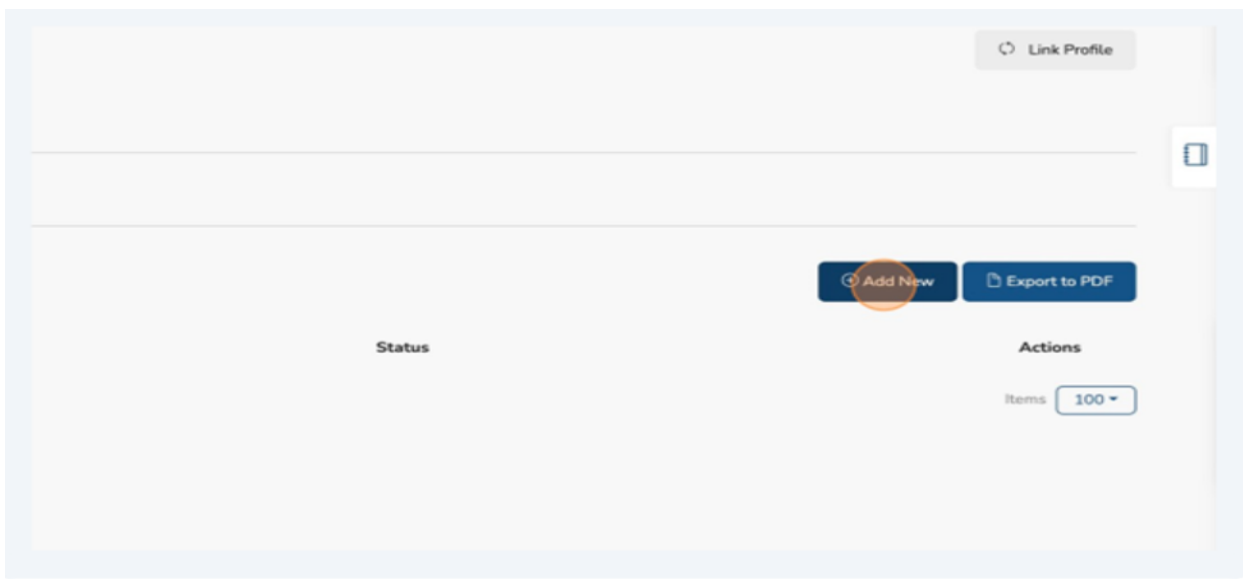
Using the task function is an effective method for handling items that are time critical. Tasks can also be assigned to clients so they too can receive notifications from the system regarding time sensitive items.

Navigate to the client profile.

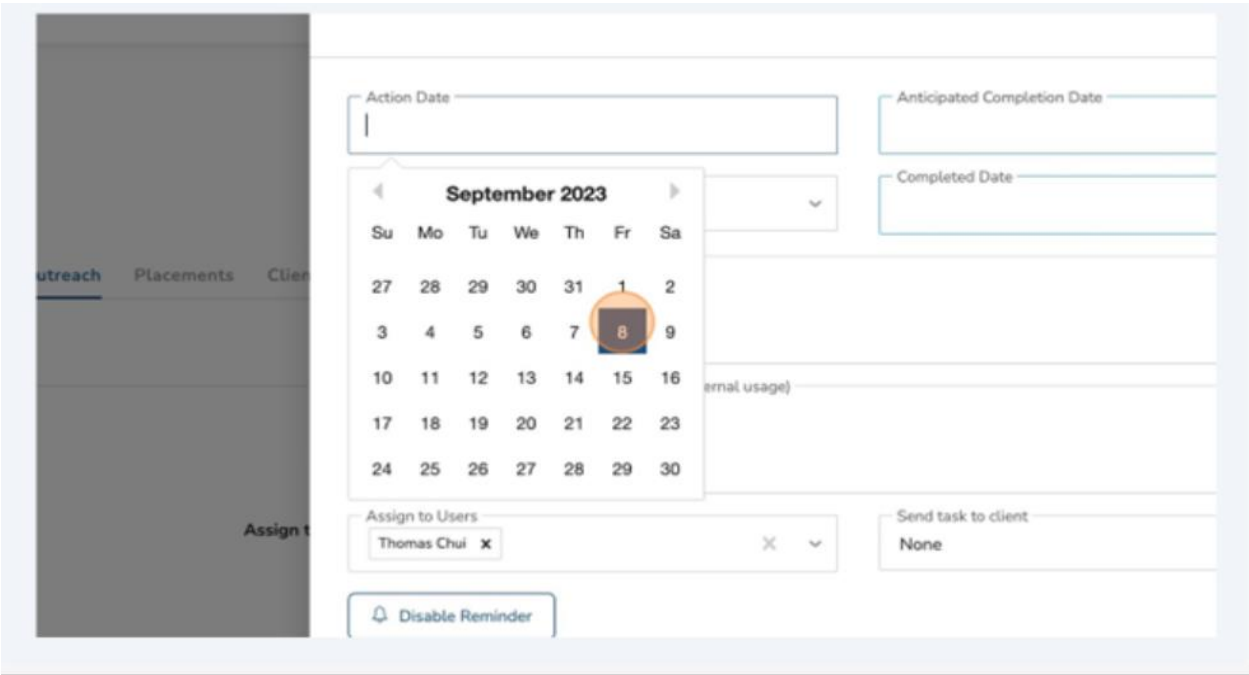
1. Click "Task/Outreach."



2. Click "Add New."

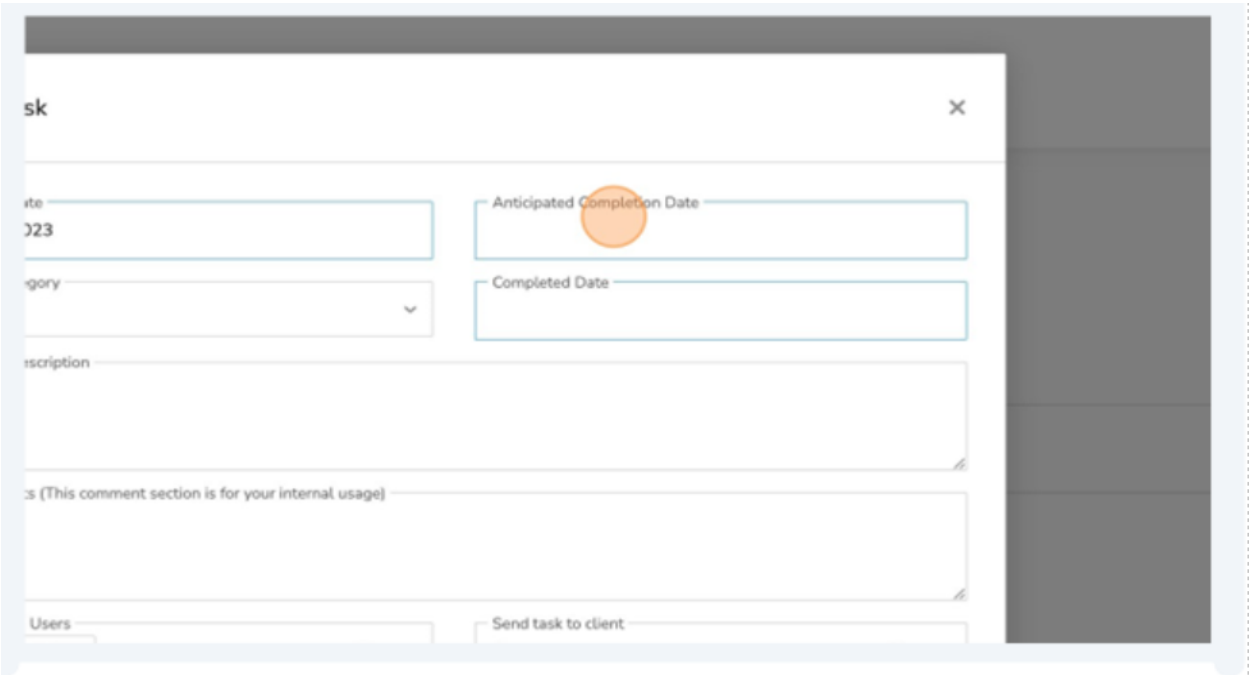


3. Click "Action Date."



4. Select the appropriate start date.

5. Click "Anticipated Completion Date."





6. Select the appropriate “Anticipated Completion Date.”

September 2023

Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

Send task to client  
None

Completed Date

7. Click “Task Category.”

New Task

Action Date: 08/09/2023

Anticipated Completion Date: 22/09/2023

Task Category: Select...

Completed Date:

Action Description:

Comments (This comment section is for your internal usage):

Assign to Users: Send task to client:

8. Select Appropriate Category.

The screenshot shows a 'New Task' form with the following fields and values:

- Action Date: 08/09/2023
- Anticipated Completion Date: 22/09/2023
- Task Category: Client Action (highlighted with an orange circle)
- Completed Date: (empty)
- Comments (This comment section is for your internal usage): (empty)
- Assign to Users: Thomas Chui (with a close button 'X' and a dropdown arrow)
- Send task to client: None

9. Click "Action Description" field.

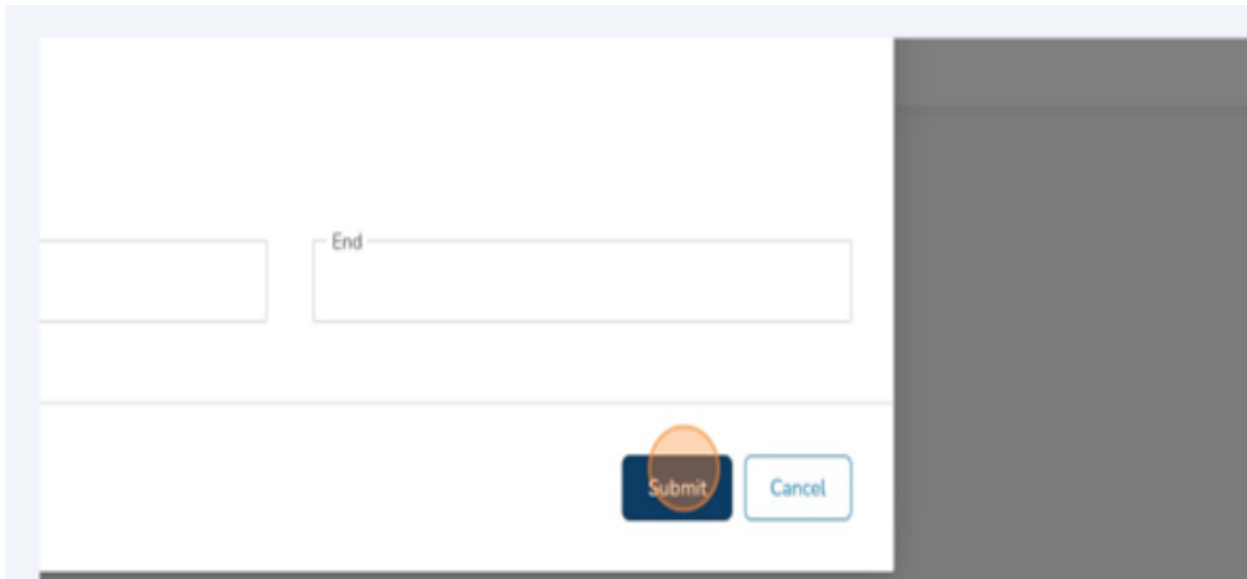
The screenshot shows the 'New Task' form with the 'Action Description' field highlighted by an orange circle. The form includes the following fields and values:

- Action Date: 08/09/2023
- Anticipated Completion Date: 22/09/2023
- Task Category: Client Action
- Action Description: (empty, highlighted with an orange circle)
- Completed Date: (empty)
- Comments (This comment section is for your internal usage): (empty)
- Assign to Users: Thomas Chui (with a close button 'X' and a dropdown arrow)
- Send task to client: None (with a close button 'X' and a dropdown arrow)
- Disable Reminder: (button)
- Default to 7 days: (checked radio button)
- Custom: (unchecked radio button)
- From: (empty)
- End: (empty)

10. Fill in the description.

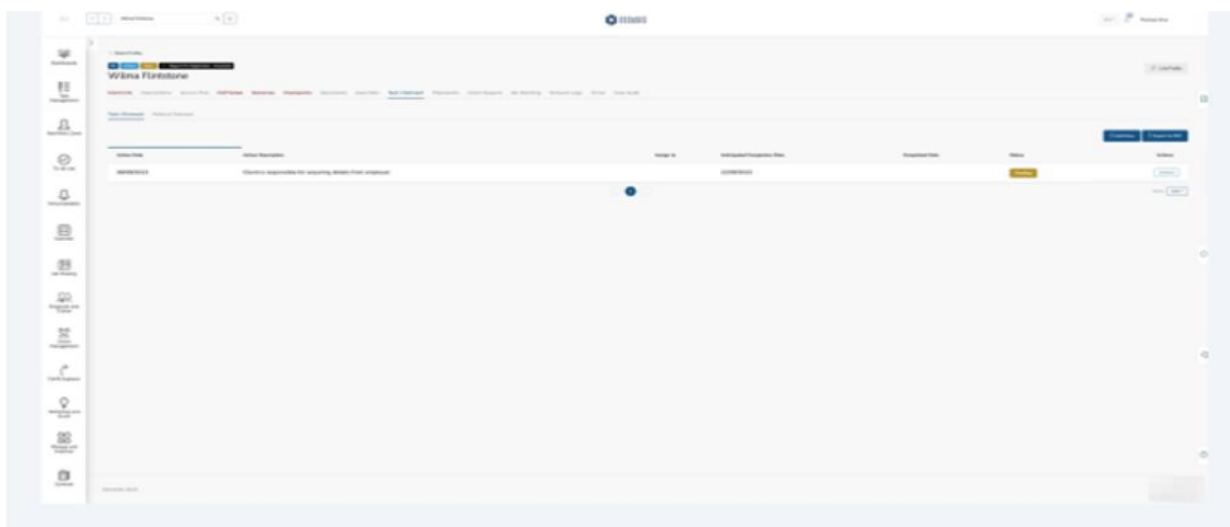
**Heads-up!** The standard reminder period is set to 7 days. Users assigned to tasks will get daily reminders through email and within ESCases notifications, starting from 7 days prior to the "Anticipated Completion Date" and continuing up until that date.

11. Click "Submit."



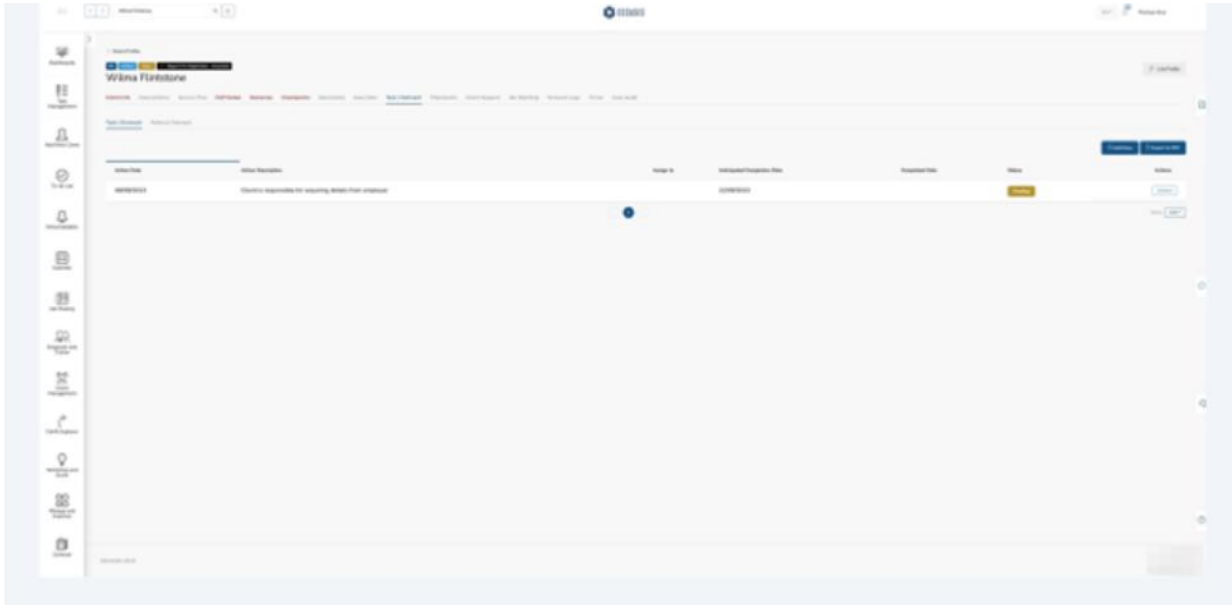
A screenshot of a web form for creating a task. The form is white and set against a light blue background. It features two input fields: a smaller one on the left and a larger one on the right labeled "End". Below these fields are two buttons: a blue "Submit" button with a white circular icon above it, and a white "Cancel" button with a blue border.

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:

### Task Summary

[Add New](#)

Pending	2 / 7
Overdue	3 / 7
Completed	2 / 7

### Milestone Check Points

Click on expander to see all. 1, 3, 6 and 12 months

Pending	9	Overdue	2	Rejected	0	Resubmission	0
---------	---	---------	---	----------	---	--------------	---

### My Assigned Task

Pending	1 / 1
Overdue	0 / 1
Completed	0 / 1

### Client Profile Activities

Here's an overview of your recent activities with job seeker profiles, giving you a historical perspective on your past client interactions.

- FM** Finlay Marsh  
User ... Add Action Plan | 08/05/2024 2:36:10 pm
- CB** Cleveland Barkley  
User ... Edited Action Plan | 08/05/2024 2:34:38 pm
- CB** Cleveland Barkley  
User ... Edited Action Plan | 08/05/2024 2:34:07 pm

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.

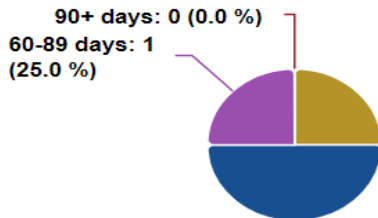
Scroll down to see the "Client Last Contact" pie chart.

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

## Client Last Contact



This pie chart represents the last contact activity for your caseload. Click on the pie chart to view the data



Exclude clients with outcomes

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

Client Last Contacted Within 15-29 days

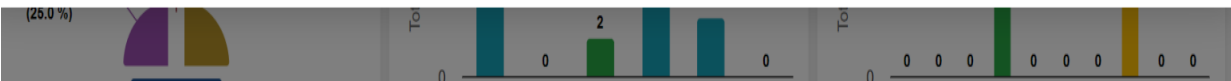
Export X

	15/04/2024 22 days	Action Date: 4/15/2024 Anticipated Completion Date: 4/17/2024 Communication Type: None Description: Client is going for job interview Comments: Will update on results	<a href="#">Add Note</a>
--	-----------------------	--	--------------------------

Showing 1 to 1 of 1 entries

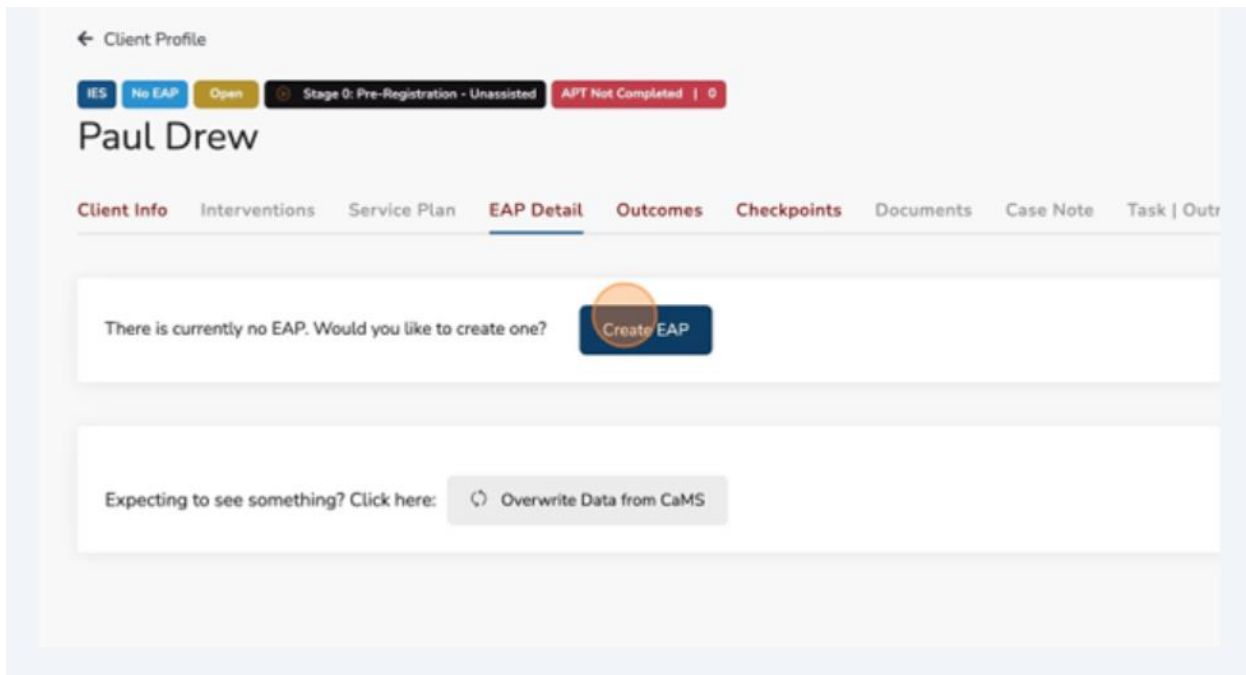
Items 5

Ok

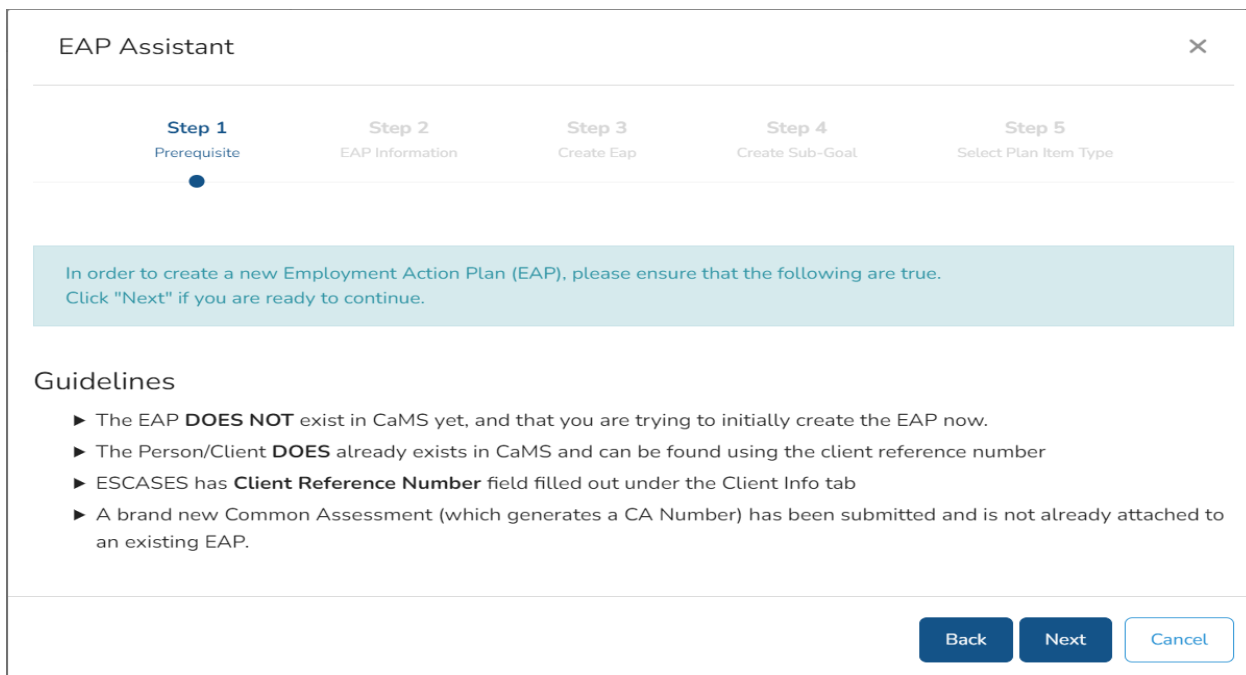




### 3. Click “Create EAP.”



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



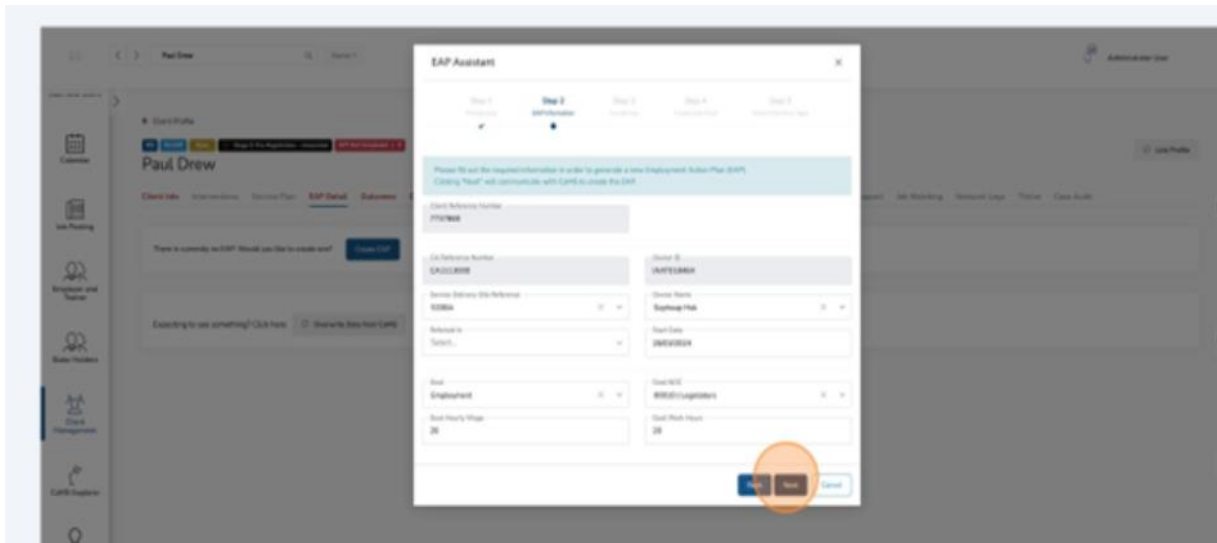


4. Click “Next”.

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

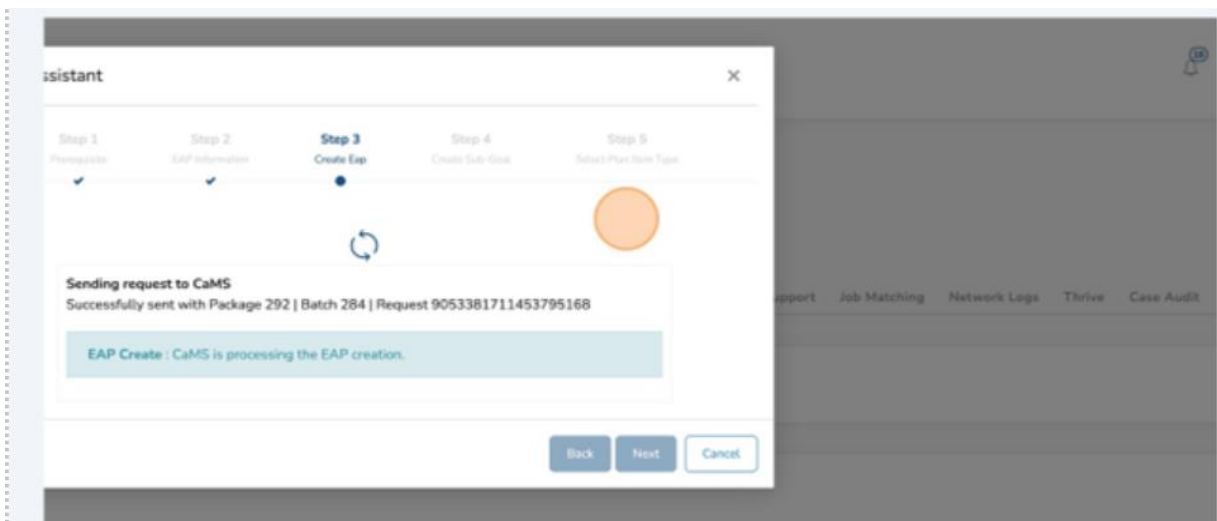
✓ Note: Ensure the Service Delivery Site is entered, or an error message will display.

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.

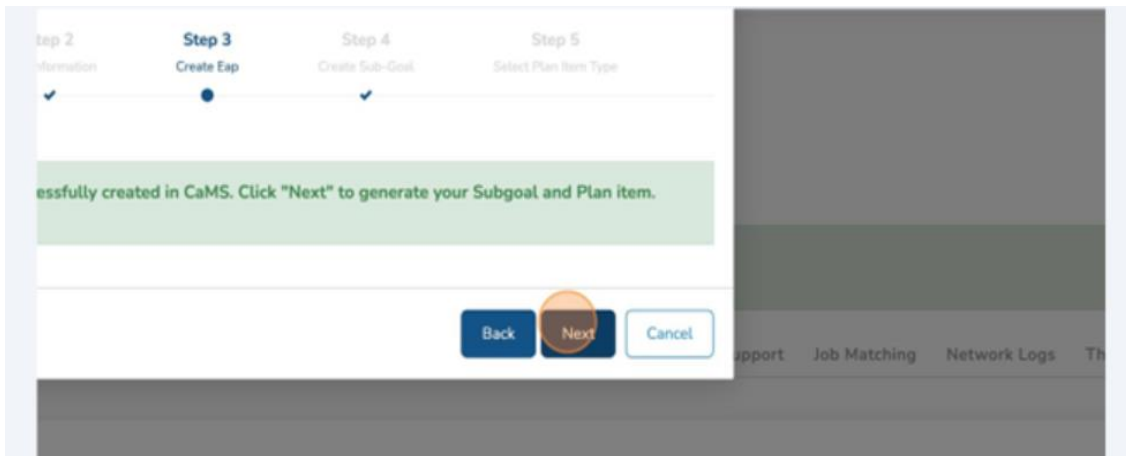
The creation of the EAP will put you in a queue to upload the details into CaMS.



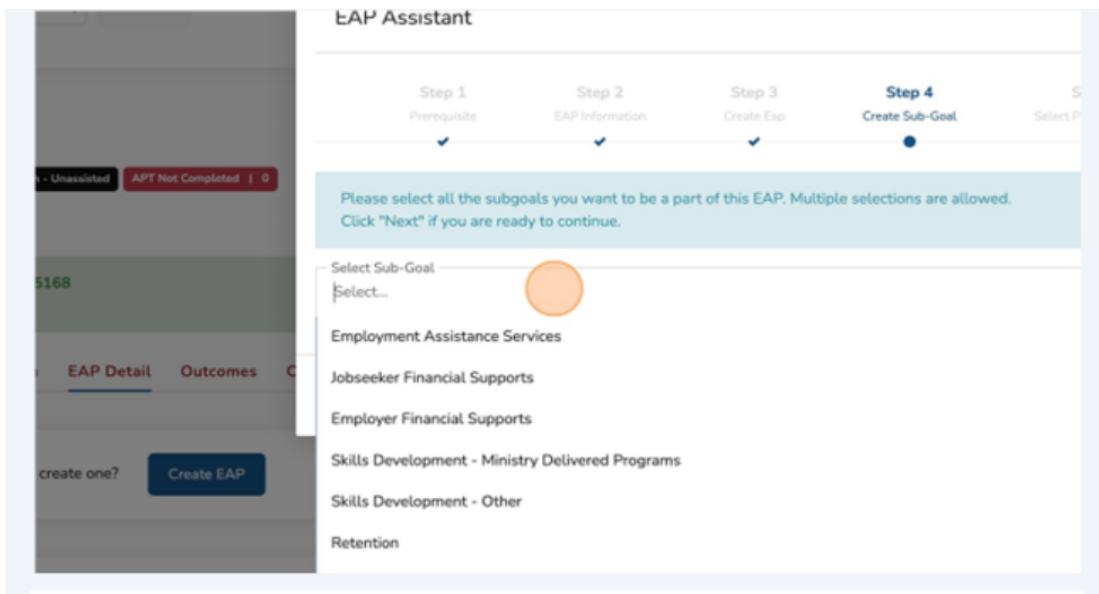
- ❖ Tip! You can multitask within ESCases while the progress modal is displaying your place in queue by working in another tab.

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.

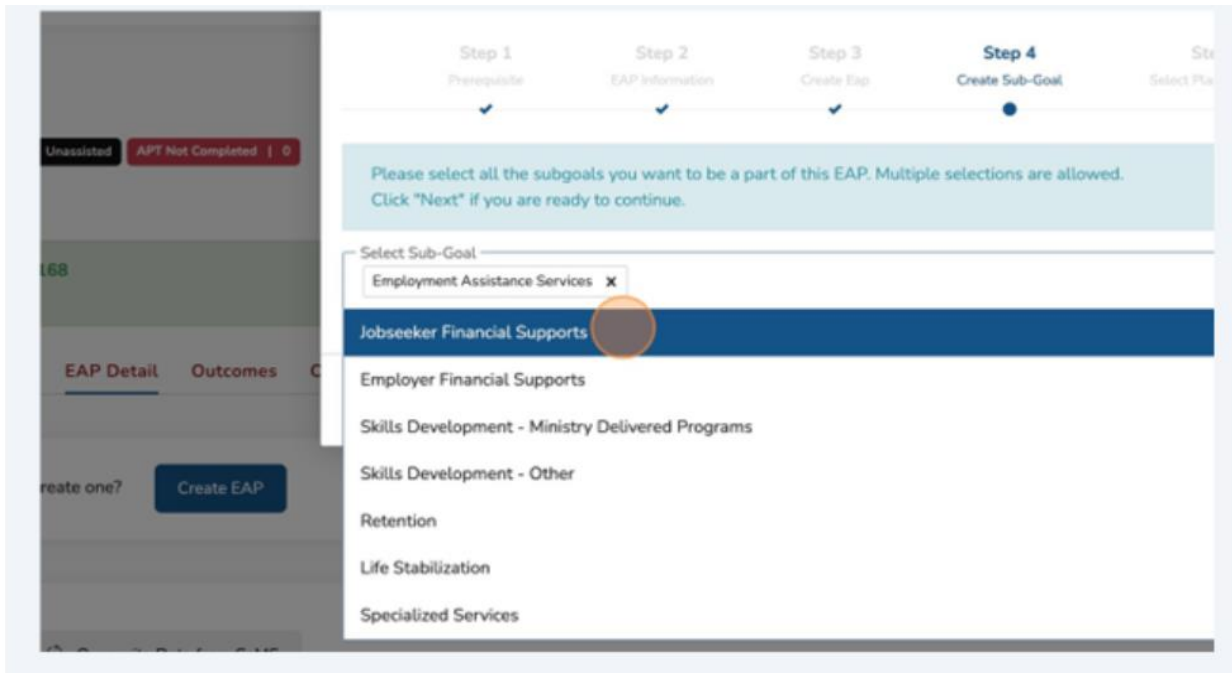
6. Click "Next."



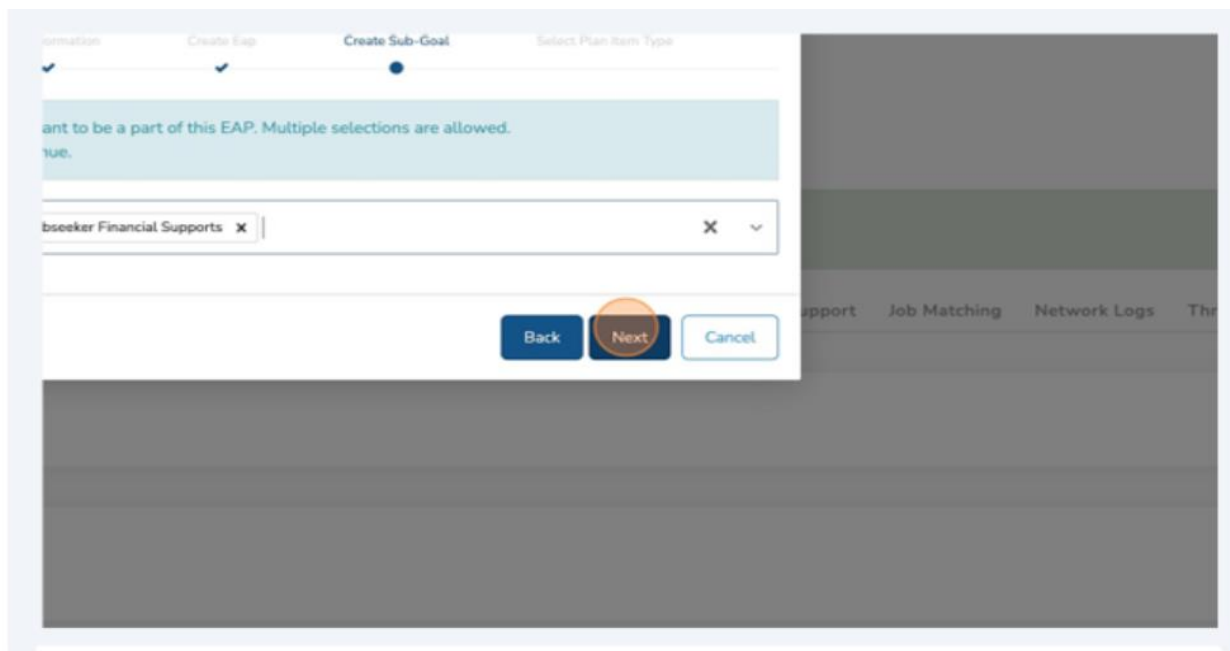
7. Click "Select Sub-Goal."



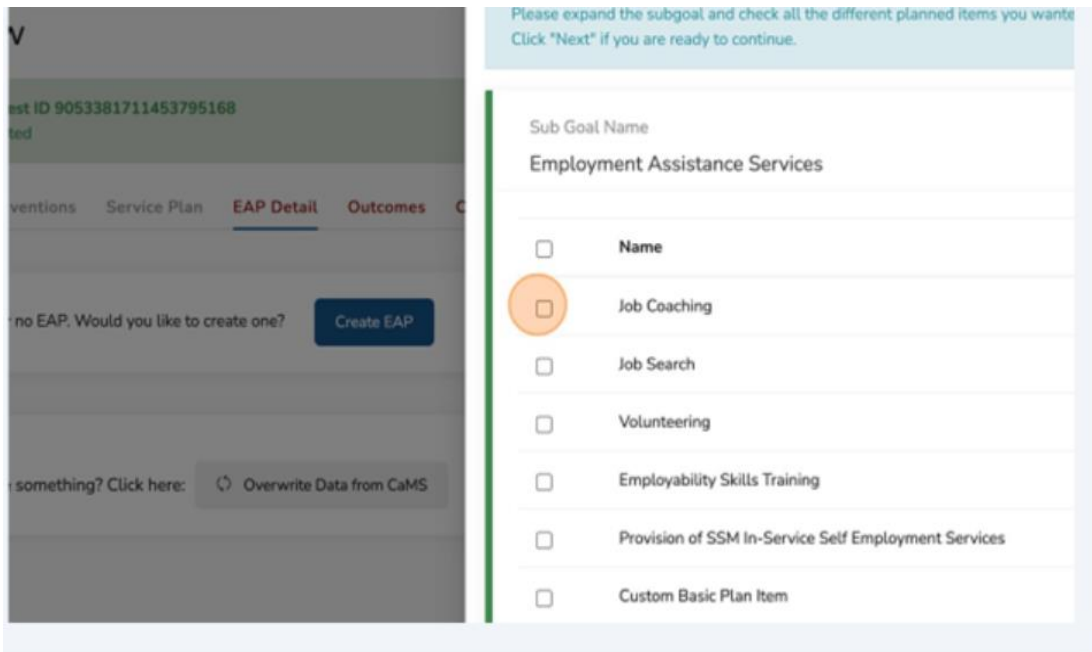
8. You can add multiple sub-goals by selecting them from the “Select Sub-Goal.” menu.



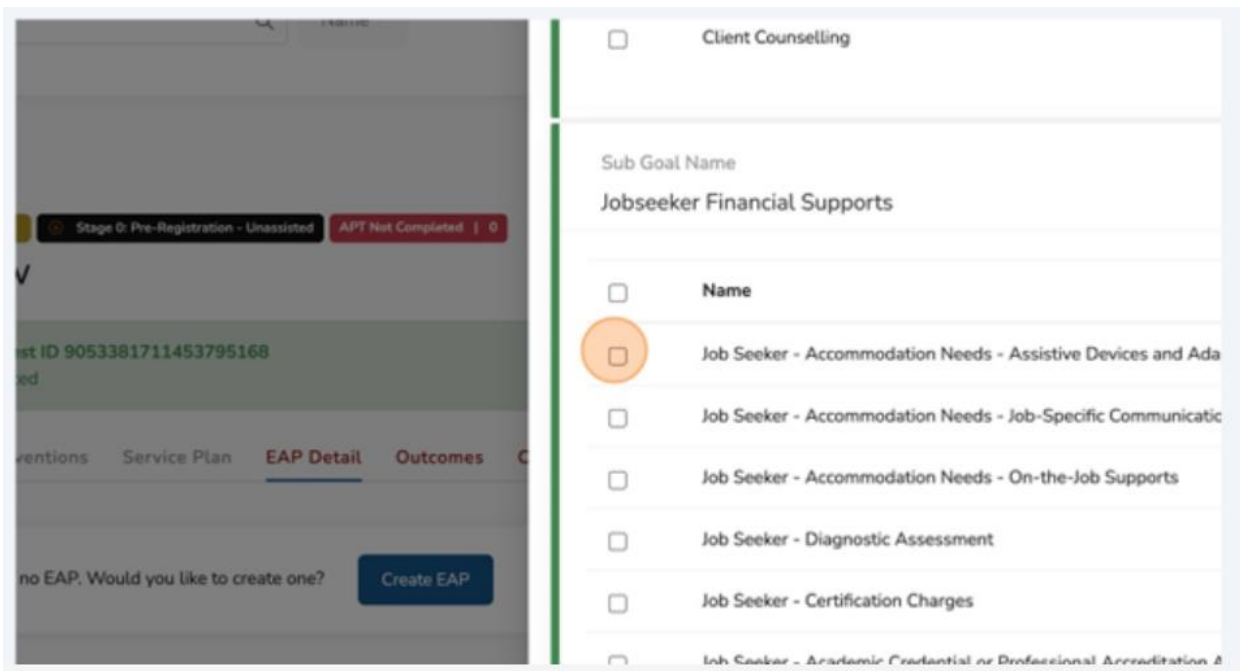
9. When you have selected all your sub-goals, click “Next.”



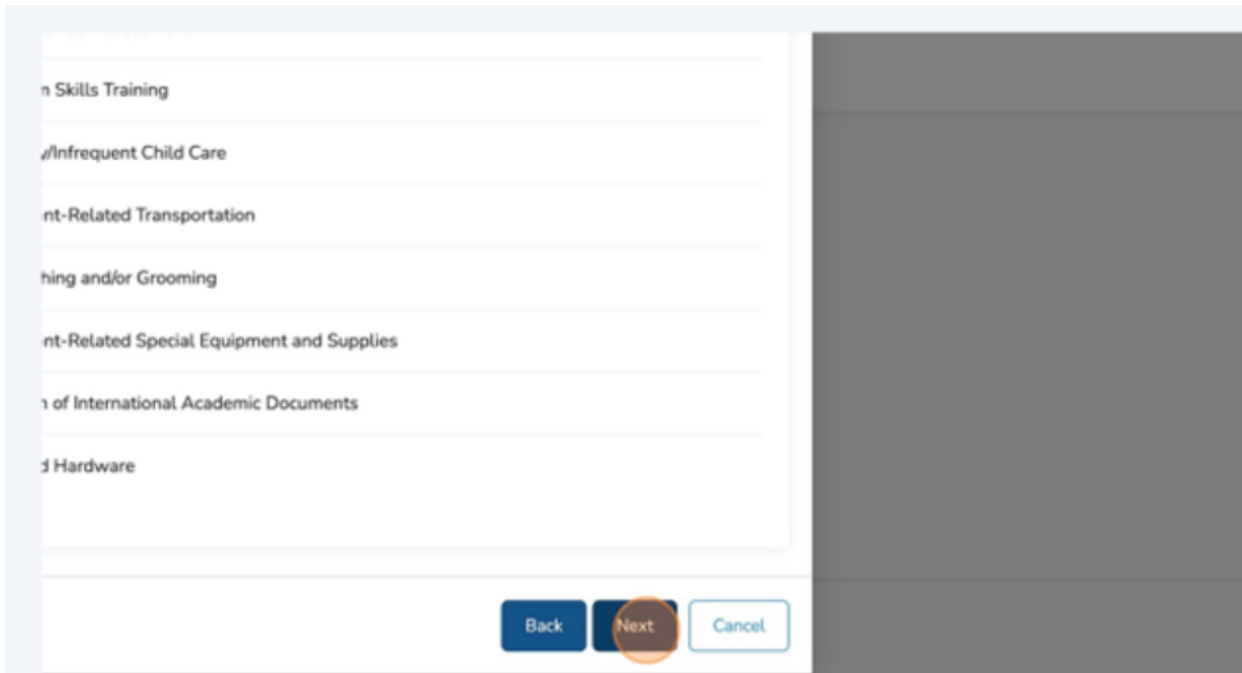
10. Select the "Planned Items" from the sub-goals you want to add.



11. Multiple Planned Items can be selected.

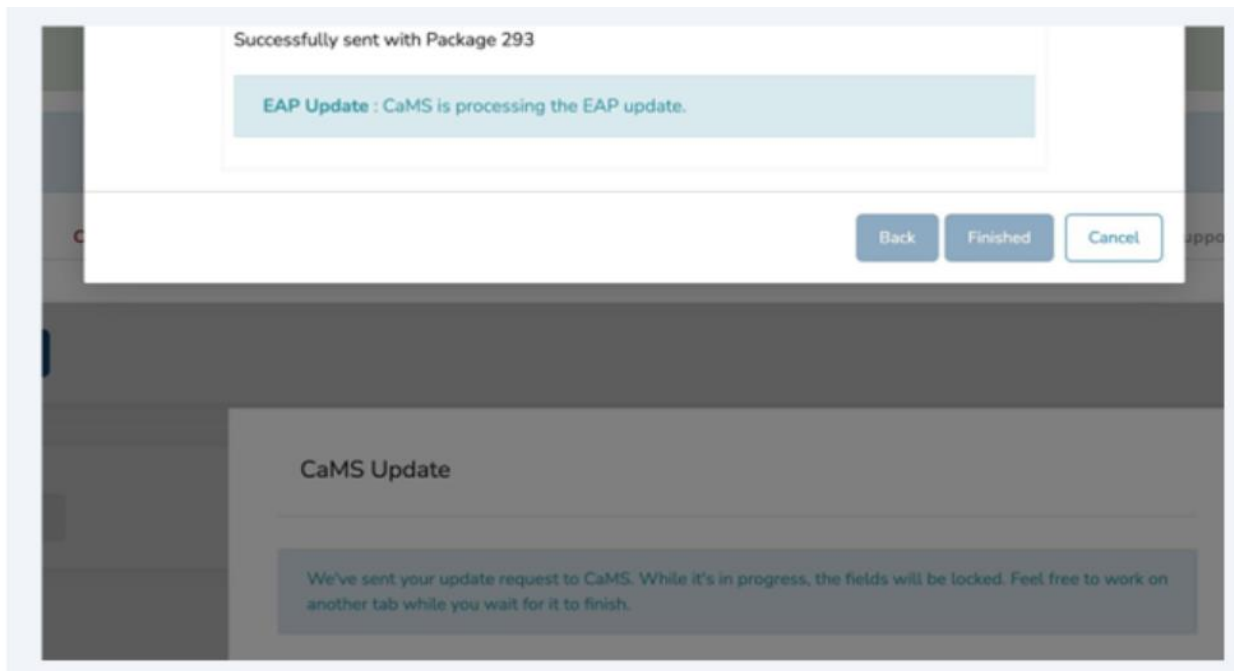


12. When all “Planned Items” have been selected, Click “Next.”



A screenshot of a web form with several text input fields. The fields contain the following text from top to bottom: "n Skills Training", "Infrequent Child Care", "nt-Related Transportation", "hing and/or Grooming", "nt-Related Special Equipment and Supplies", "n of International Academic Documents", and "d Hardware". At the bottom right of the form, there are three buttons: "Back", "Next", and "Cancel". The "Next" button is highlighted with a circular orange glow.

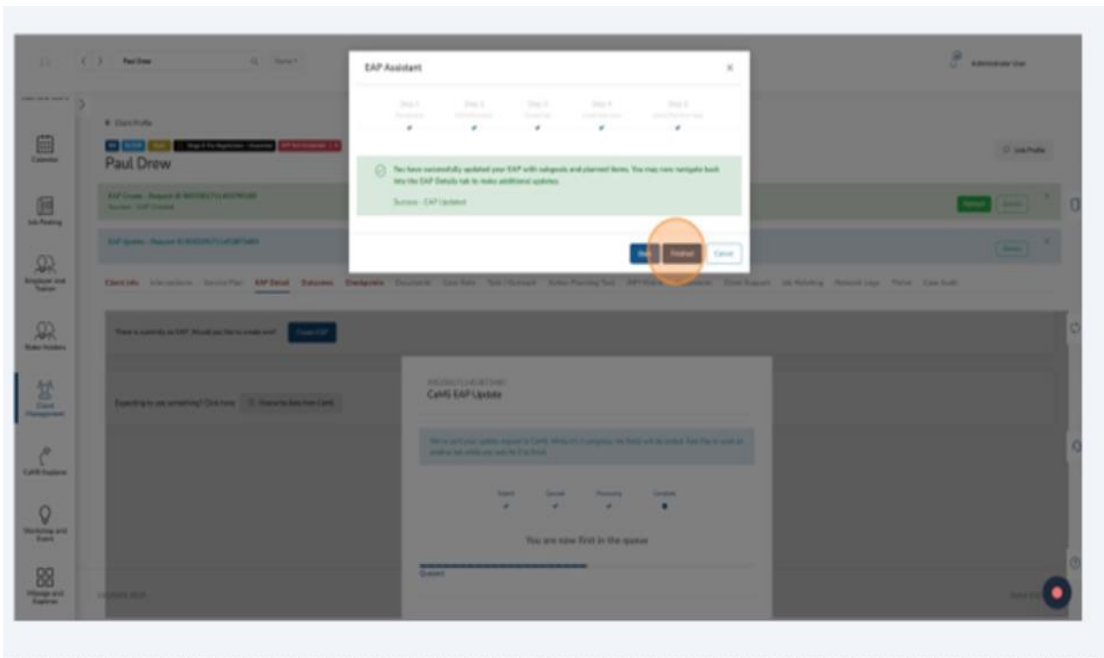
The EAP status will update to “Active” when the EAP Assistant is completed.



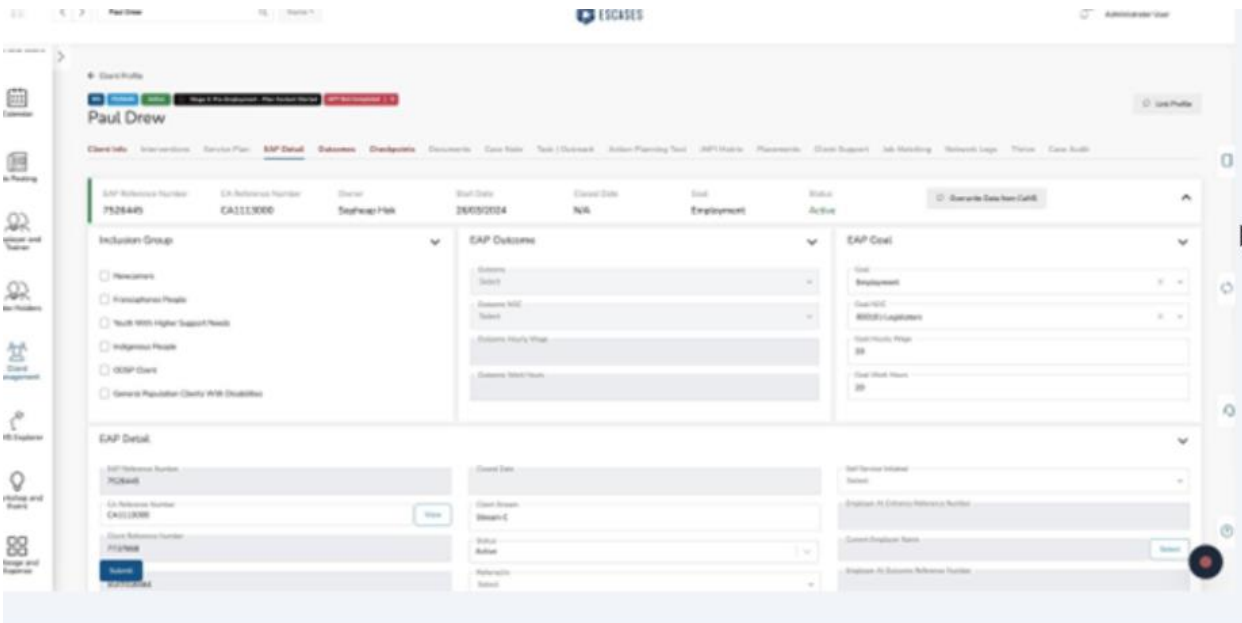
A screenshot of a web interface showing a confirmation message. At the top, it says "Successfully sent with Package 293". Below this is a light blue box containing the text "EAP Update : CaMS is processing the EAP update." To the right of this box are three buttons: "Back", "Finished", and "Cancel". Below the message box is a section titled "CaMS Update" with a grey background. Inside this section, a message reads: "We've sent your update request to CaMS. While it's in progress, the fields will be locked. Feel free to work on another tab while you wait for it to finish."

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.

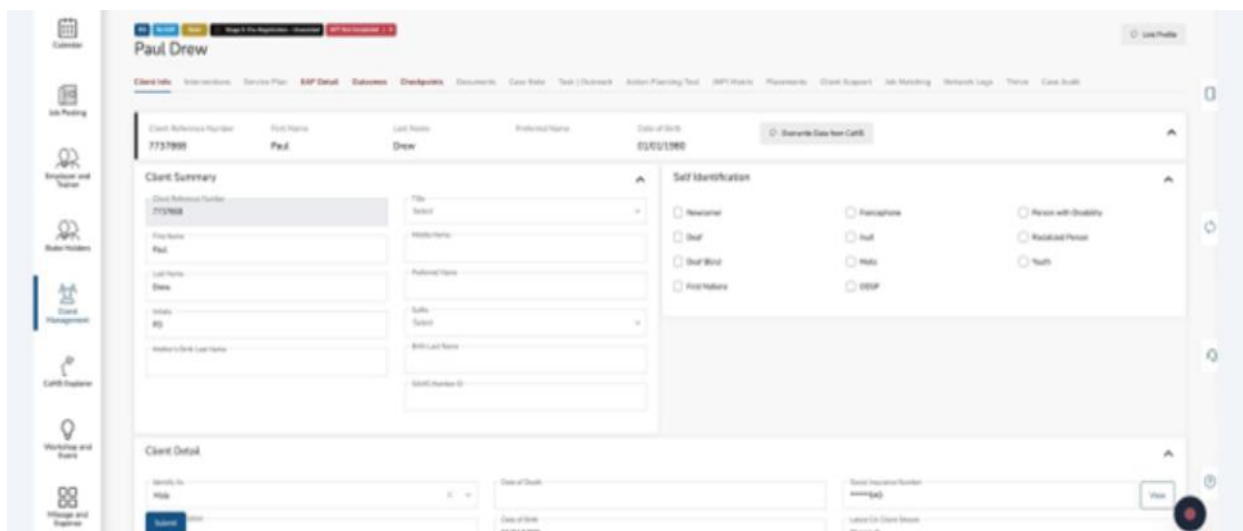


# (13) Upload a Document and Complete a Financial Support Planned Item

## 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.

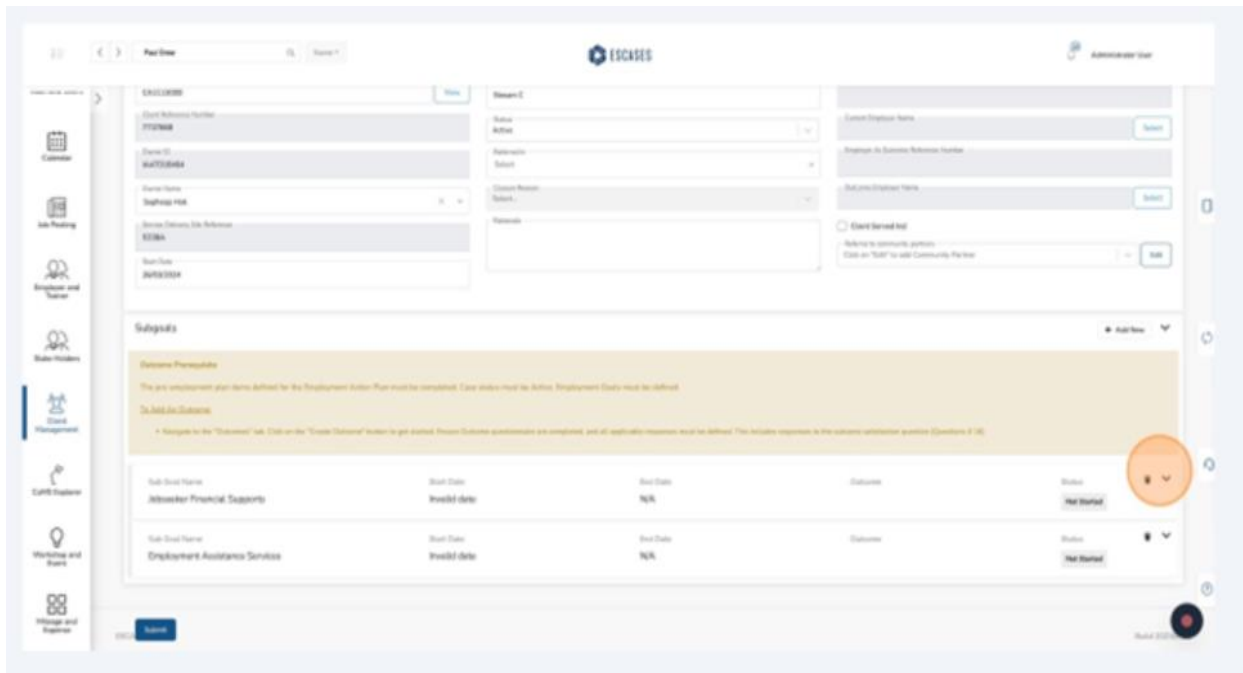
1. Navigate to the client profile.



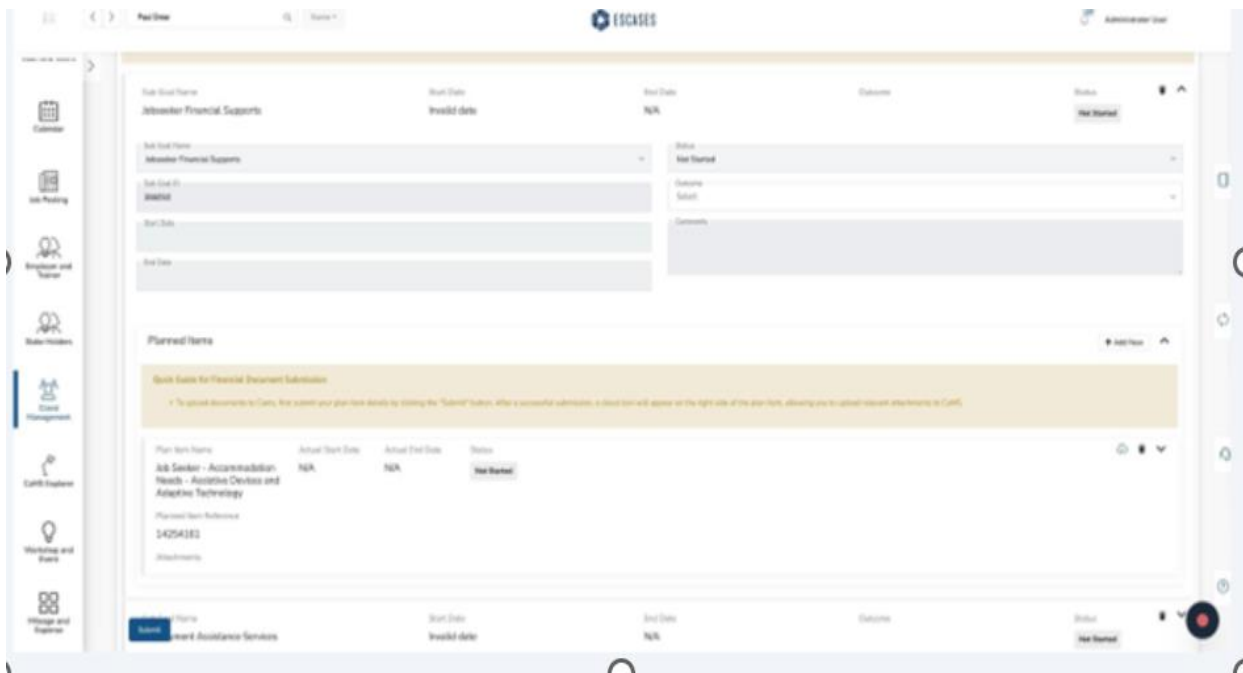
2. Click "EAP Detail."



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.

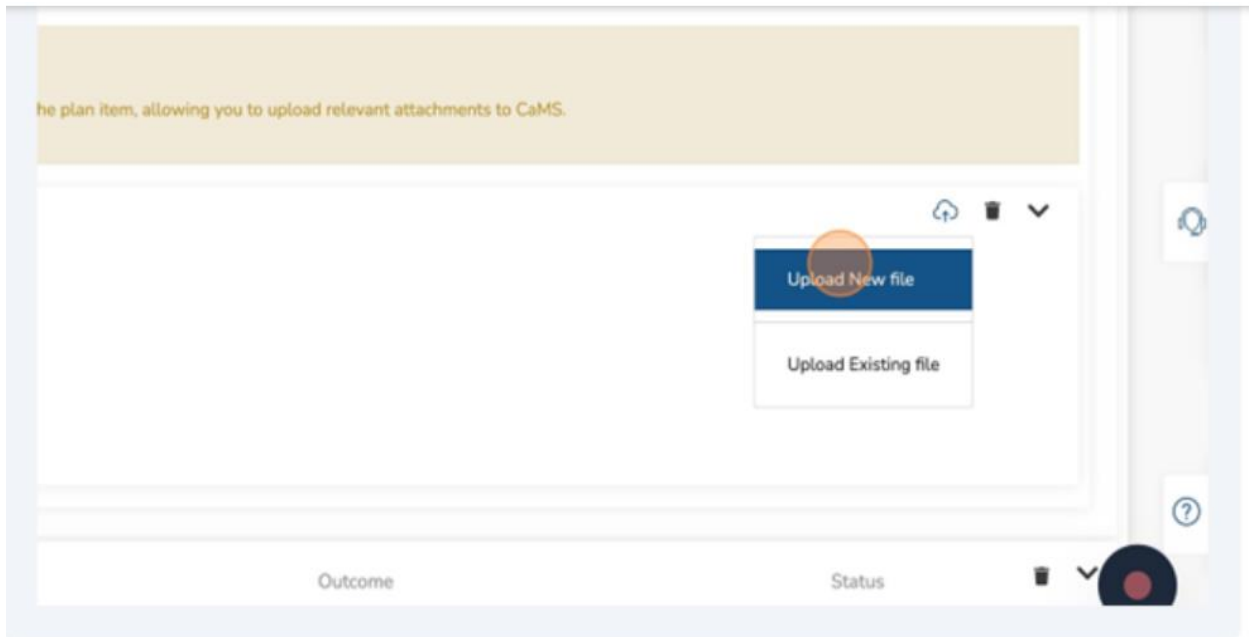




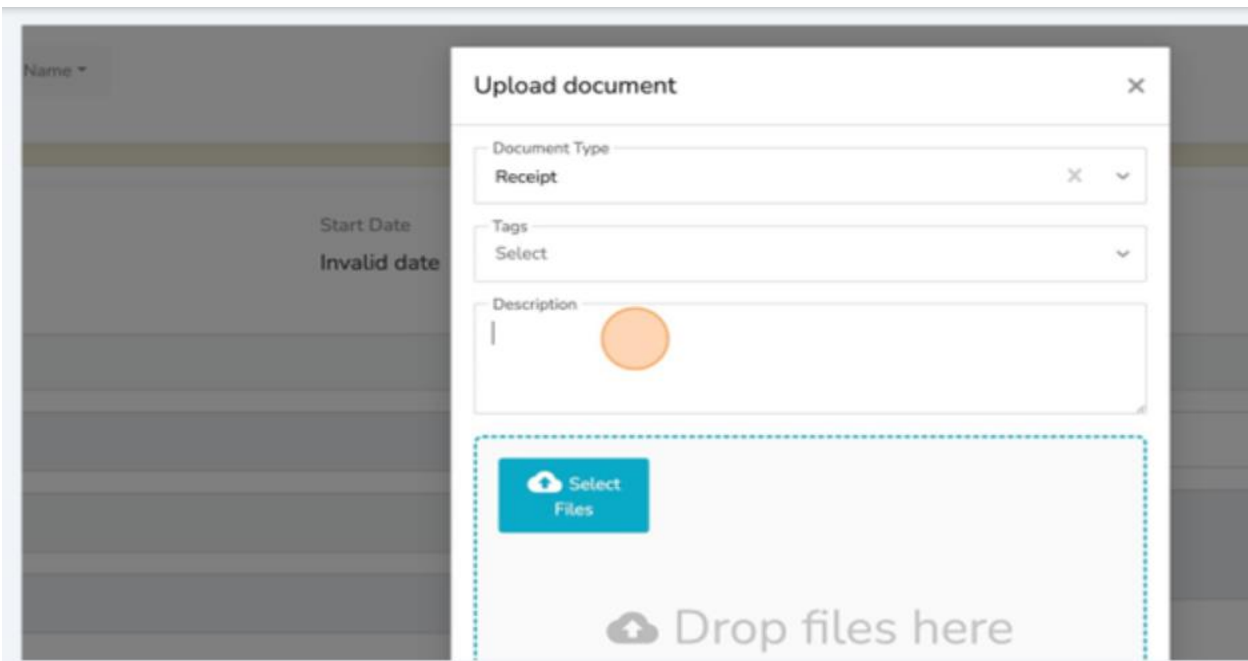
5. Click the “Cloud” icon to begin the process of attaching the required Planned Item document.



6. Click “Upload New File.”



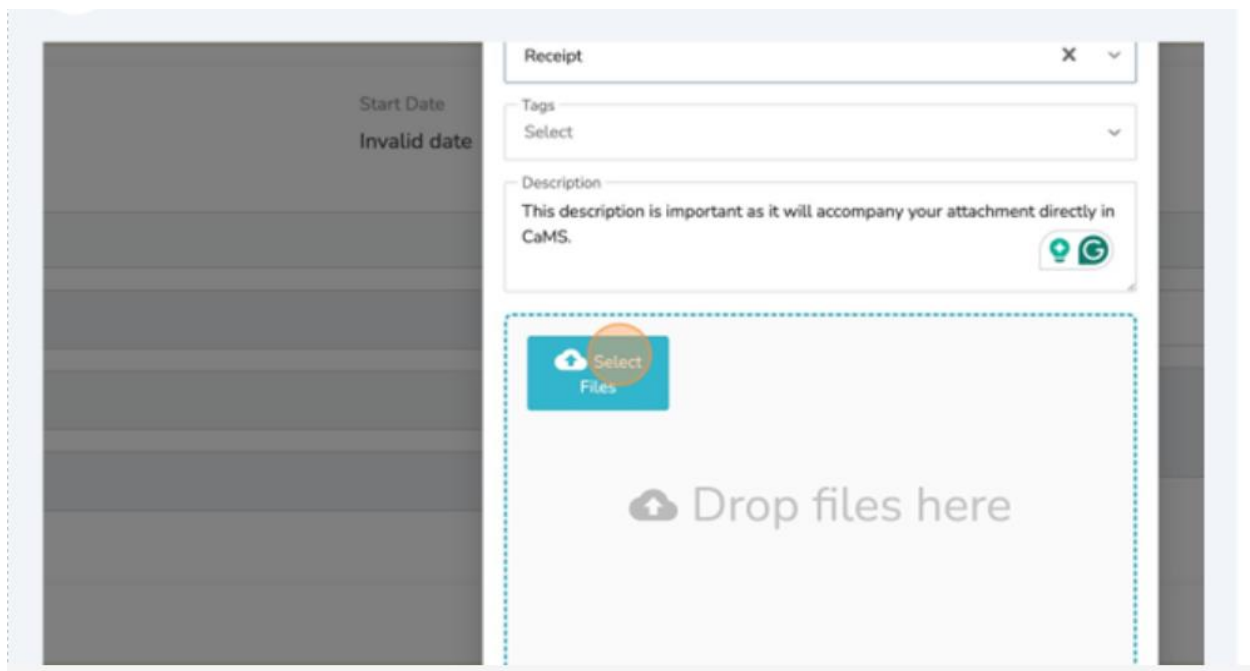
7. Click on the “Description” field.



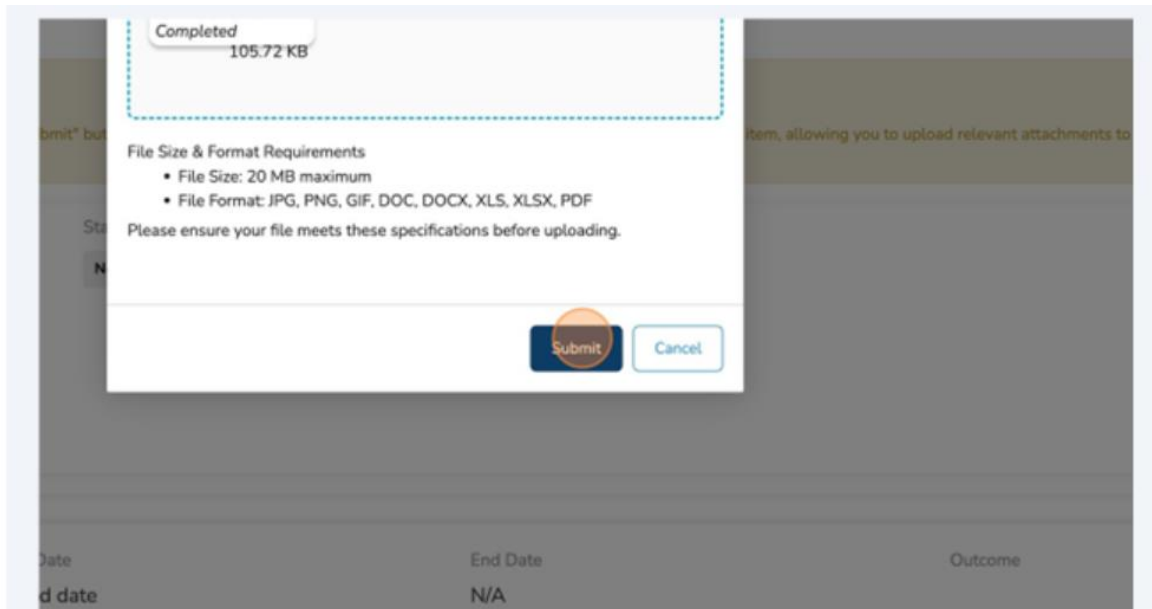
8. Insert the description for this attachment.

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

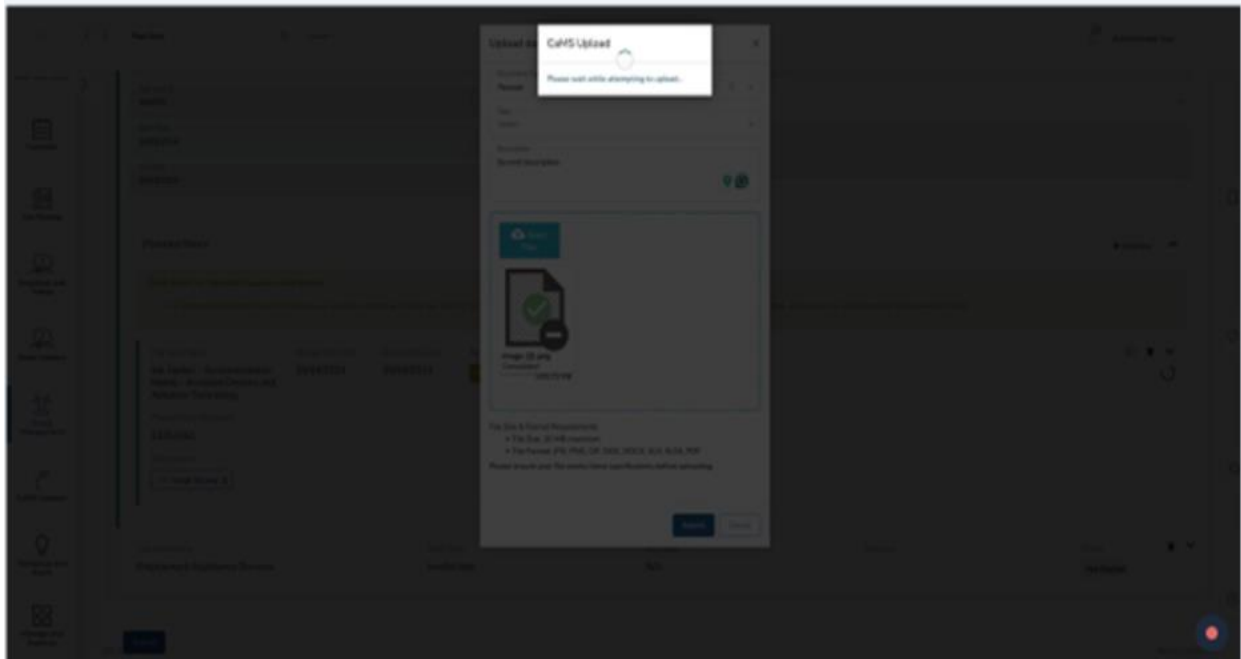
9. Click “Select Files” and choose the attachment for this planned item.



10. Click "Submit."

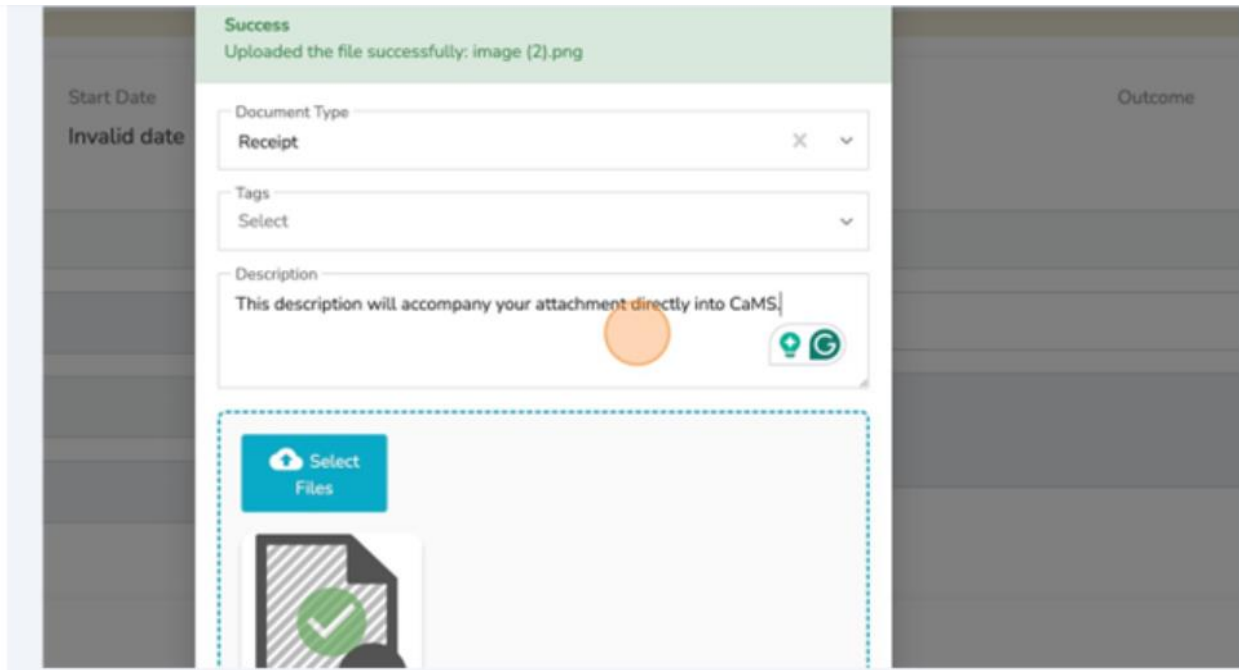


When the CaMS Upload begins, the entire screen focus will highlight the action.

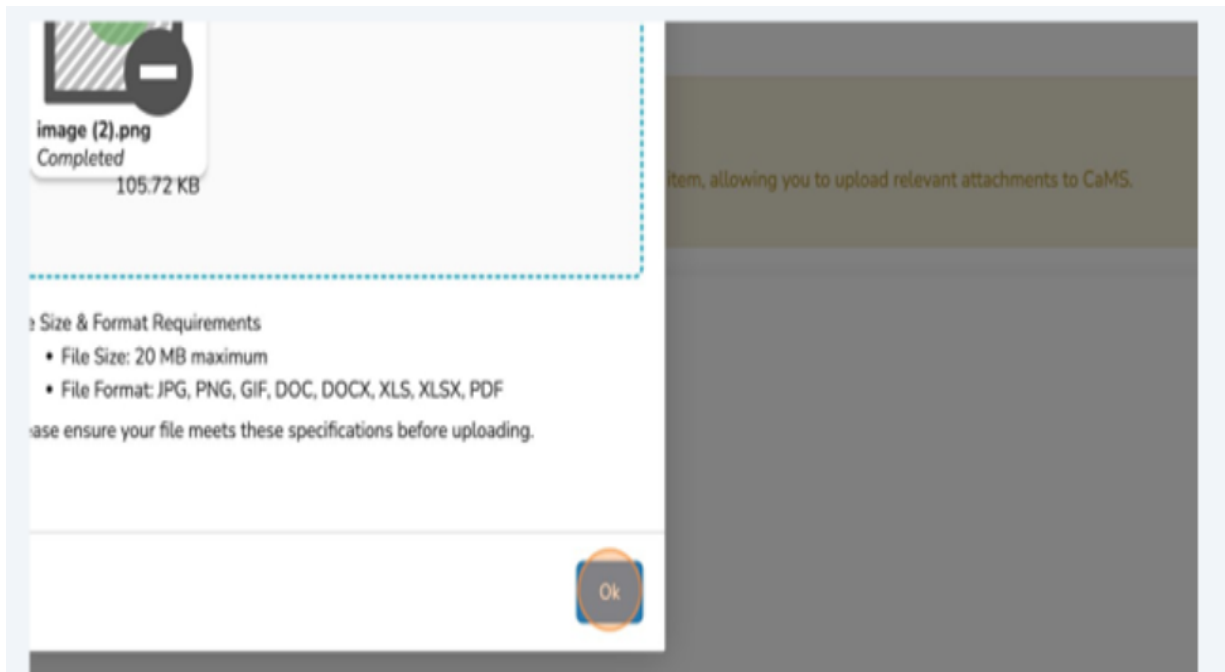


- Alert! While the upload is occurring directly into CaMS, the screen will display a primary focus on this action to signify the importance.

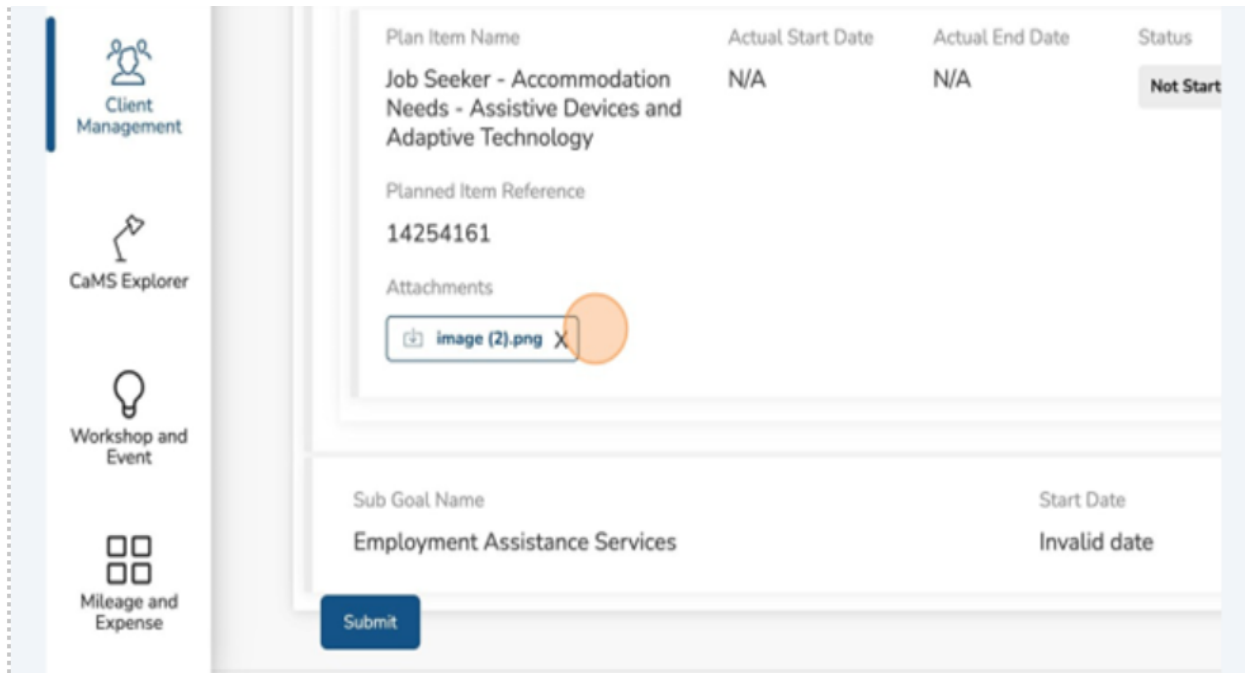
11. A “success” notification will display when the file is uploaded into CaMS.



12. Click “OK.”



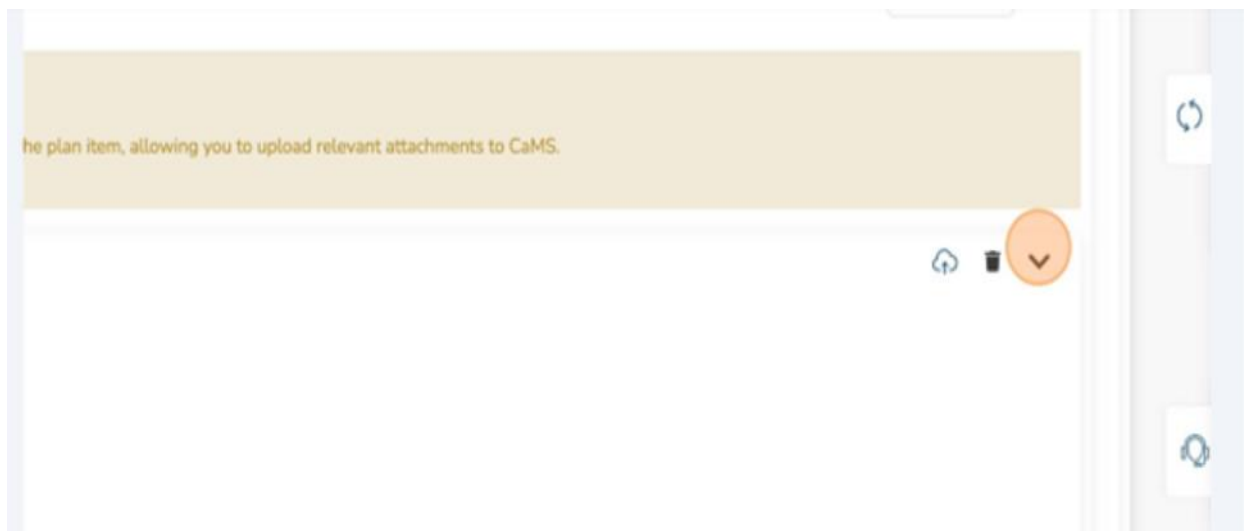
The new attachment can be seen in the Attachments section.



✓ 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."

The screenshot shows a form with several fields. On the left, there is a search bar with an 'X' and a dropdown arrow. Below it are four empty input fields. On the right, there are several labeled sections: 'Service Delivery Site Reference' with the value '5338A', 'Caseworker' with the value 'Select' (highlighted by an orange circle), 'Actual End Date', 'Outcome' with the value 'Select', and 'Status' with the value 'Not Started'.

3. Select the appropriate Caseworker.

This screenshot shows the same form as above, but the 'Caseworker' dropdown menu is open. The option 'Sopheap Hok' is selected and highlighted in blue. The text 'sop' is visible above the dropdown. At the bottom of the form, there is a checkbox labeled 'Ready for Review' which is currently unchecked.

4. Click "Actual Start Date."

General Information

Plan Item Name  
Job Seeker - Accommodation Needs - Assistive Devices and Adaptive Technology

Caseworker ID  
IAAT018464

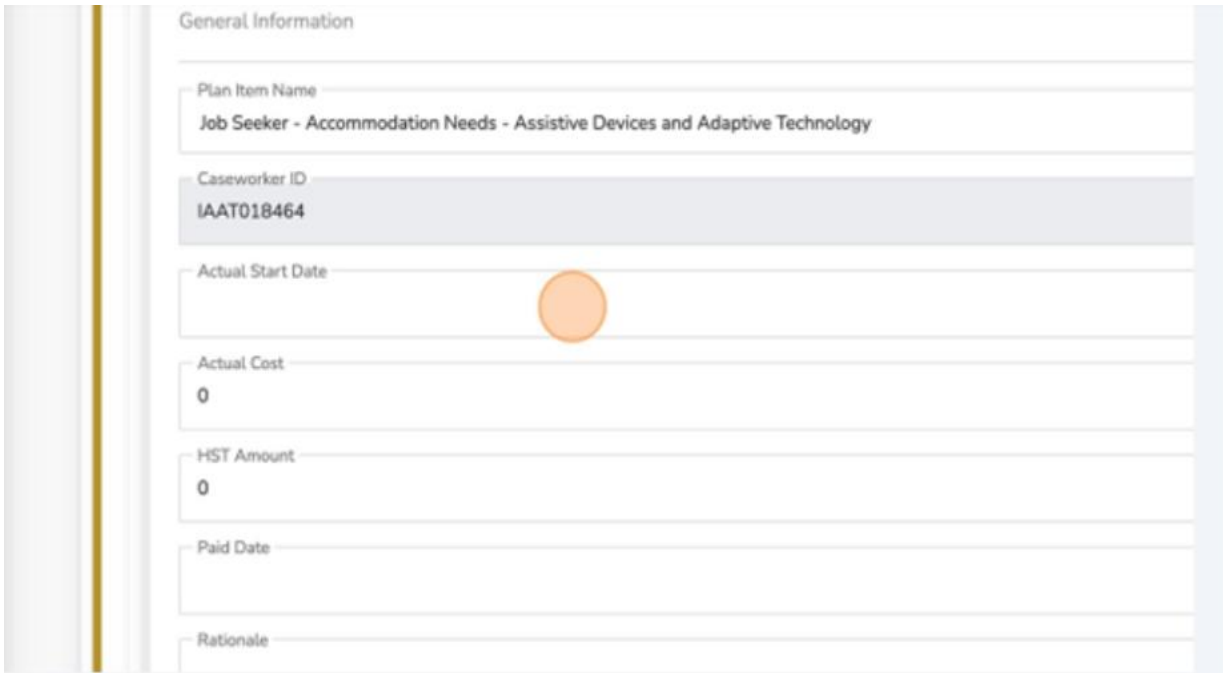
Actual Start Date

Actual Cost  
0

HST Amount  
0

Paid Date

Rationale



5. Select the appropriate "Start Date."

Client Management

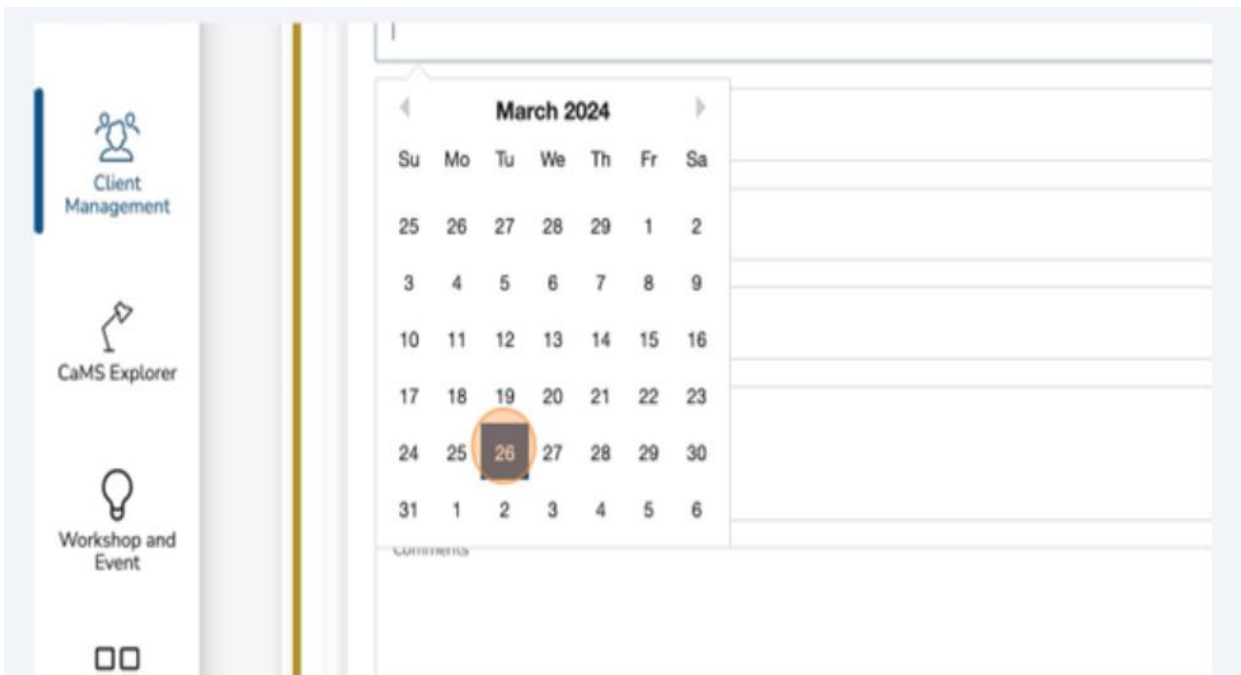
CaMS Explorer

Workshop and Event

March 2024

Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

COMMENTS



6. Click “Actual End Date.”

A screenshot of a web form with several input fields. The fields are arranged in two columns. The right column contains the following fields: 'Service Delivery Site Reference' with the value '5338A', 'Caseworker' with the value 'Sopheap Hok', 'Actual End Date' (highlighted with an orange circle), 'Outcome' with the value 'Select', and 'Status' with the value 'In Progress'. Below these fields is a checkbox labeled 'Ready for Review' which is currently unchecked. The left column contains several empty input fields, the top one having a clear button (X) and a dropdown arrow (v).

7. Select the appropriate “End Date.”

A screenshot of a calendar interface for March 2024. The calendar is displayed in a grid format with days of the week (Su, Mo, Tu, We, Th, Fr, Sa) as column headers. The dates are arranged in rows. The date '26' is highlighted with an orange circle. The calendar is overlaid on a form background with several empty input fields visible on the left and right sides.

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
25	26	27	28	29	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6



8. Click the “Actual Cost” field.

The screenshot shows a software interface with a sidebar on the left containing icons and labels: 'r and ver', 'olders', 'nt ment', and '>'. The main form area contains the following fields:

Plan Item Name	Job Seeker - Accommodation Needs - Assistive Devices and Adaptive Technology
Caseworker ID	IAAT018464
Actual Start Date	26/03/2024
Actual Cost	0
HST Amount	0
Paid Date	

An orange circle is positioned over the 'Actual Cost' field, which contains the value '0'.

9. Insert the appropriate cost.

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

10. Click the “HST Amount” field.

The screenshot shows a software interface with a sidebar on the left containing icons and labels: 'Holders', 'ment', 'Explorer', and 'shop and vent'. The main form area contains the following fields:

IAAT018464	
Actual Start Date	26/03/2024
Actual Cost	0
HST Amount	0
Paid Date	
Rationale	
Comments	

An orange circle is positioned over the 'HST Amount' field, which contains the value '0'.

11. Insert the appropriate HST Amount.

12. Click on the "Paid Date" field.

The screenshot shows a software interface with a sidebar on the left containing four menu items: "Stake Holders", "Client Management", "CaMS Explorer", and "Workshop and Event". The "Client Management" item is highlighted with a blue bar. The main area displays a calendar for March 2024, with the date 26 highlighted in blue. Below the calendar is a form with three fields: "Paid Date", "Rationale", and "Comments". An orange circle highlights the "Paid Date" field.

13. Select the appropriate "Paid Date."

The screenshot shows the same software interface as in the previous image, but with the "Employer and Trainer" menu item highlighted in the sidebar. The calendar is open to March 2024, and the date 26 is highlighted in blue. The "Paid Date" field in the form below the calendar is highlighted with an orange circle.

14. Click the “Rationale Field.”

The screenshot shows a software interface with a sidebar on the left containing three icons: 'Client Management' (two people), 'CaMS Explorer' (a magnifying glass), and 'Workshop and Event' (a lightbulb). The main area contains a form with the following fields: 'Actual Cost' with the value '100', 'HST Amount' with the value '0', 'Paid Date' with the value '26/03/2024', 'Rationale' (highlighted with an orange circle), and 'Comments'.

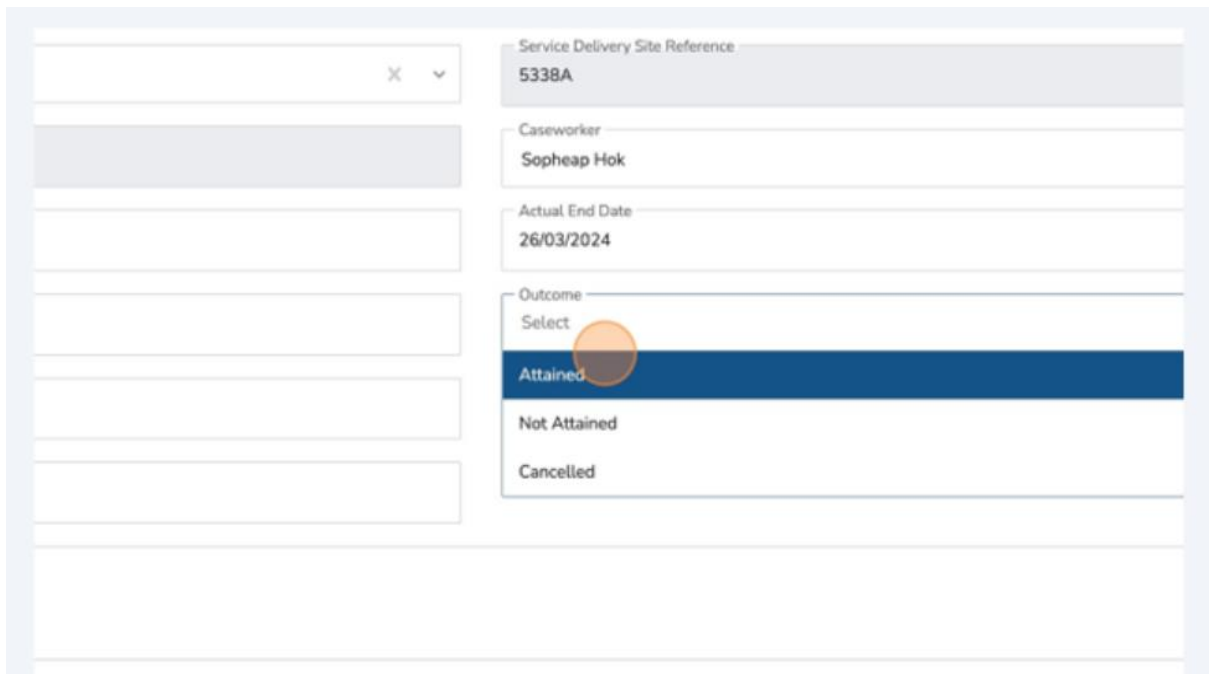
15. Insert the appropriate “Rationale.”

- ✓ 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.

The screenshot shows a software interface with a form containing the following fields: 'Service Delivery Site Reference' with the value '5338A', 'Caseworker' with the value 'Sopheap Hok', 'Actual End Date' with the value '26/03/2024', 'Outcome' with the value 'Select' (highlighted with an orange circle), 'Status' with the value 'Completed', and a checkbox labeled 'Ready for Review' which is currently unchecked.

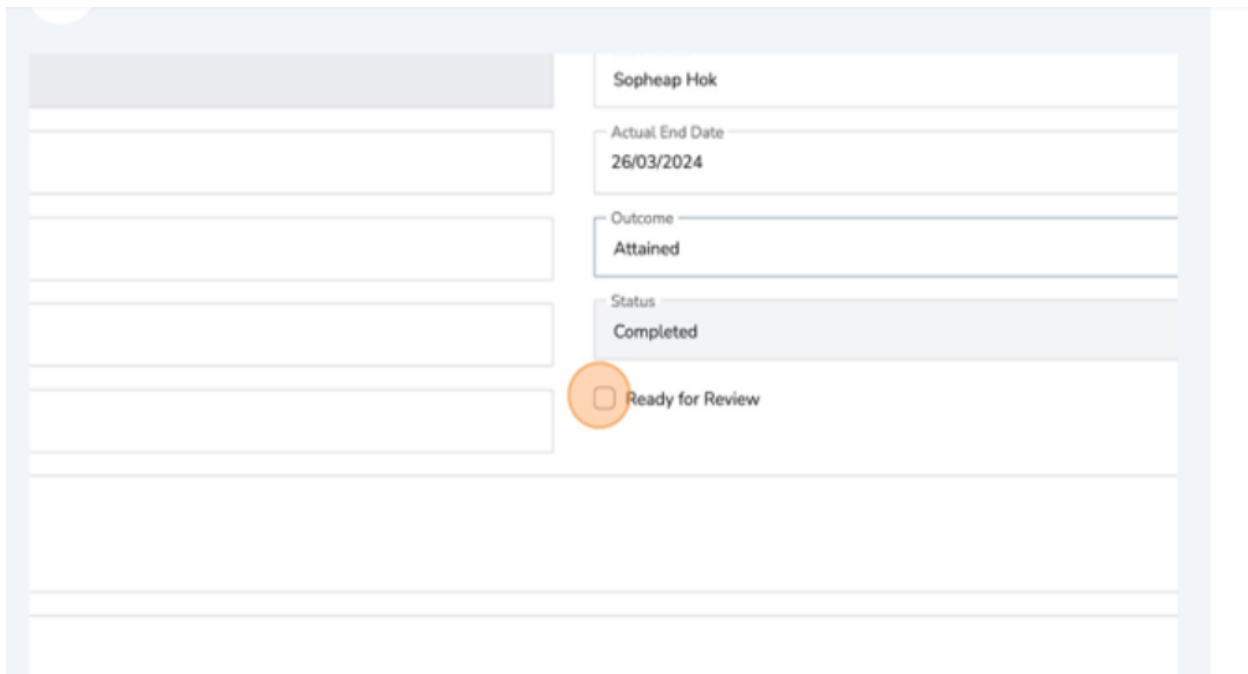
17. Select the appropriate "Outcome."



The screenshot shows a form with several input fields. On the right side, the following fields are visible:

- Service Delivery Site Reference: 5338A
- Caseworker: Sopheap Hok
- Actual End Date: 26/03/2024
- Outcome: A dropdown menu is open, showing options: Select, **Attained** (highlighted with a blue bar and an orange circle), Not Attained, and Cancelled.

18. Click the "Ready for Review" checkbox.



The screenshot shows the same form as above, but with the following changes:

- The 'Outcome' dropdown is now closed, and the text 'Attained' is displayed in the field.
- The 'Status' field is highlighted in grey and contains the text 'Completed'.
- Below the 'Status' field, there is a checkbox labeled 'Ready for Review', which is highlighted with an orange circle.

19. Click "Submit."

The screenshot shows a web form with a sidebar on the left containing navigation icons for Client Management, CaMS Explorer, Workshop and Event, and Mileage and Expense. The main form area contains the following fields:

- Actual Start Date: 26/03/2024
- Actual Cost: 100
- HST Amount: 0
- Paid Date: 26/03/2024
- Rationale: A rationale for this particular client support.
- Comments: (empty)

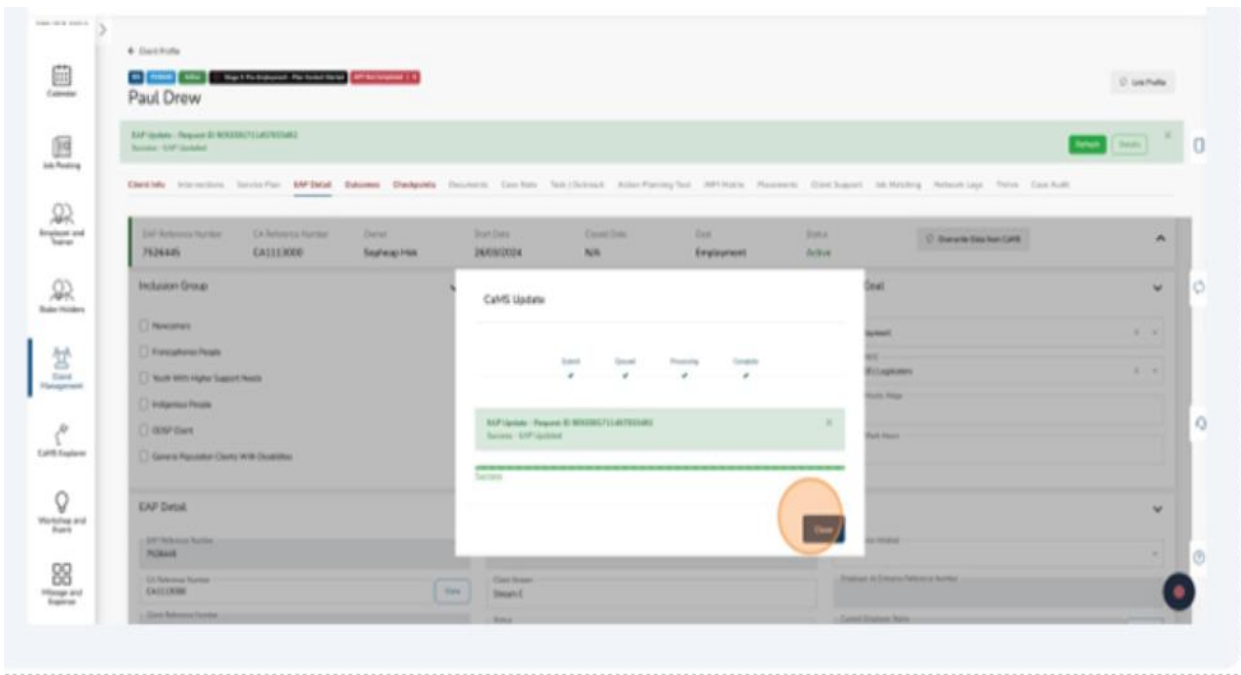
A blue "Submit" button is highlighted with an orange circle at the bottom left of the form area.

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

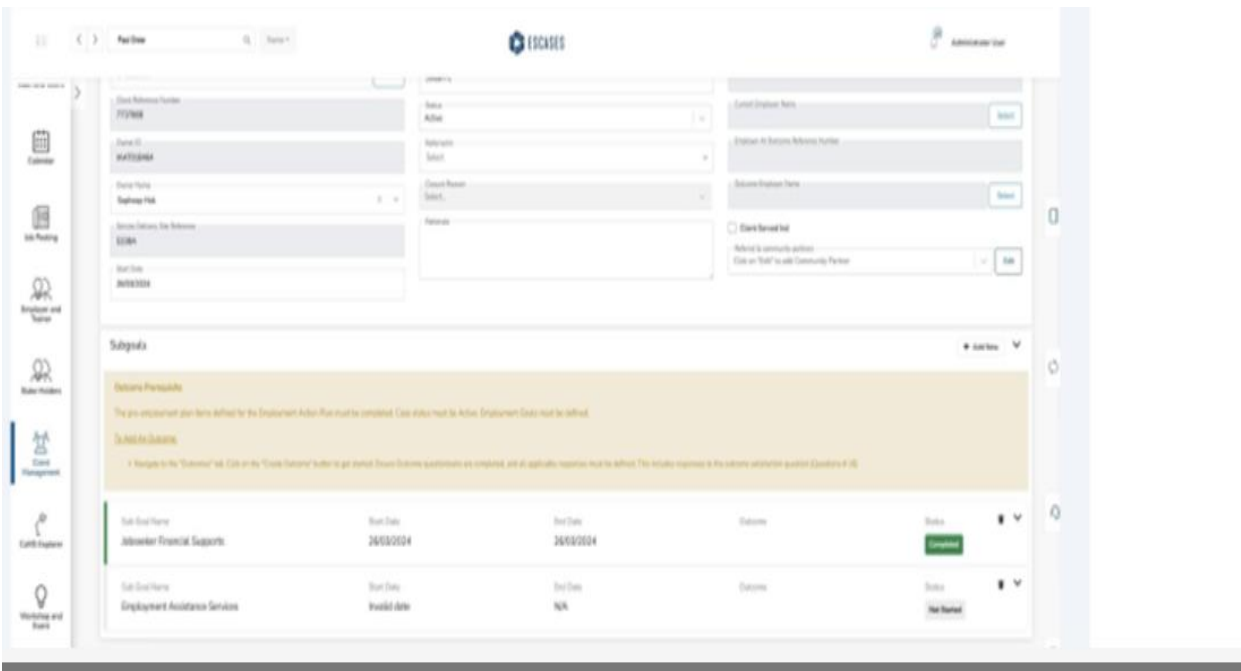
The screenshot shows a progress bar for a "CaMS Update". The progress bar has four stages: Submit, Queued, Processing, and Complete. The "Submitted" stage is marked with a checkmark, indicating it is complete. A message above the progress bar states: "We've sent your update request to CaMS. While it's in progress, the fields will be locked. Feel free to work on another tab while you wait for it to finish." Below the progress bar, the text "You are now first in the queue" is displayed. A "Submitted" label is visible at the bottom left of the progress bar area.

Start Date	Closed Date	Goal	Status
26/03/2024	N/A	Employment	Active

20. When the submission is completed, click “Close.”

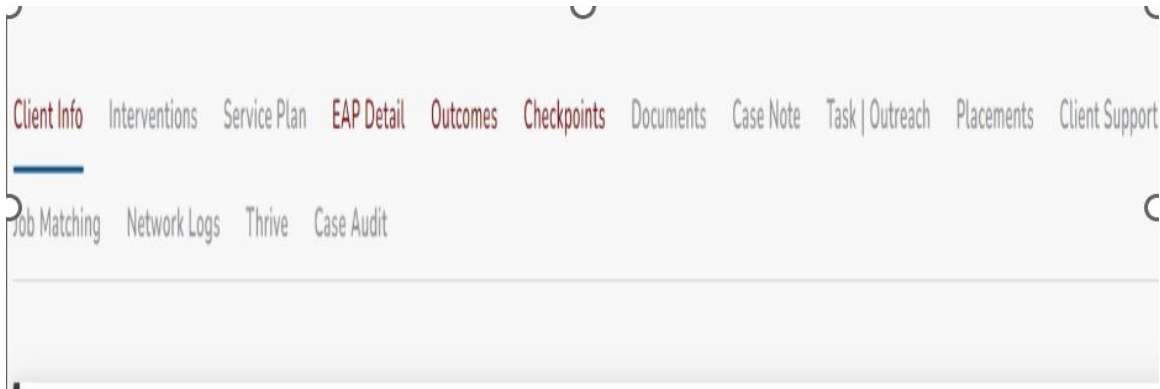


The page will refresh with your submission processed by CaMS.



## (14) Early Exits

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



2. Scroll down to “EAP Details.”

A screenshot of the 'EAP Detail' form. The title 'EAP Detail' is circled in black. The form contains the following fields:

EAP Reference Number 7526990	Closed Date	Self Service Initiated Select
CA Reference Number CA1113260 <a href="#">View</a>	Client Stream Stream A	Employer At Entrance Reference Number
Client Reference Number 7738410	Status Active	Current Employer Name <a href="#">Select</a>
Owner ID JAAT019158	Referred In EO - Employment Service Provider	Employer At Outcome Reference Number

3. Click "Status."

The screenshot shows the 'EAP Detail' form with the following fields and values:

- EAP Reference Number: 7526990
- Closed Date: (empty)
- Self Service Initiated: Select
- CA Reference Number: CA1113260 (with a 'View' button)
- Client Stream: Stream A
- Employer At Entrance Reference Number: (empty)
- Client Reference Number: 7738410
- Status: Active (circled in red)
- Current Employer Name: (empty) (with a 'Select' button)
- Owner ID: IAAT019158
- Referred In: EO - Employment Service Provider
- Employer At Outcome Reference Number: (empty)

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

The screenshot shows the 'Close Service Plan: 7526990' dialog box overlaid on the EAP Detail form. The dialog box contains the following fields and buttons:

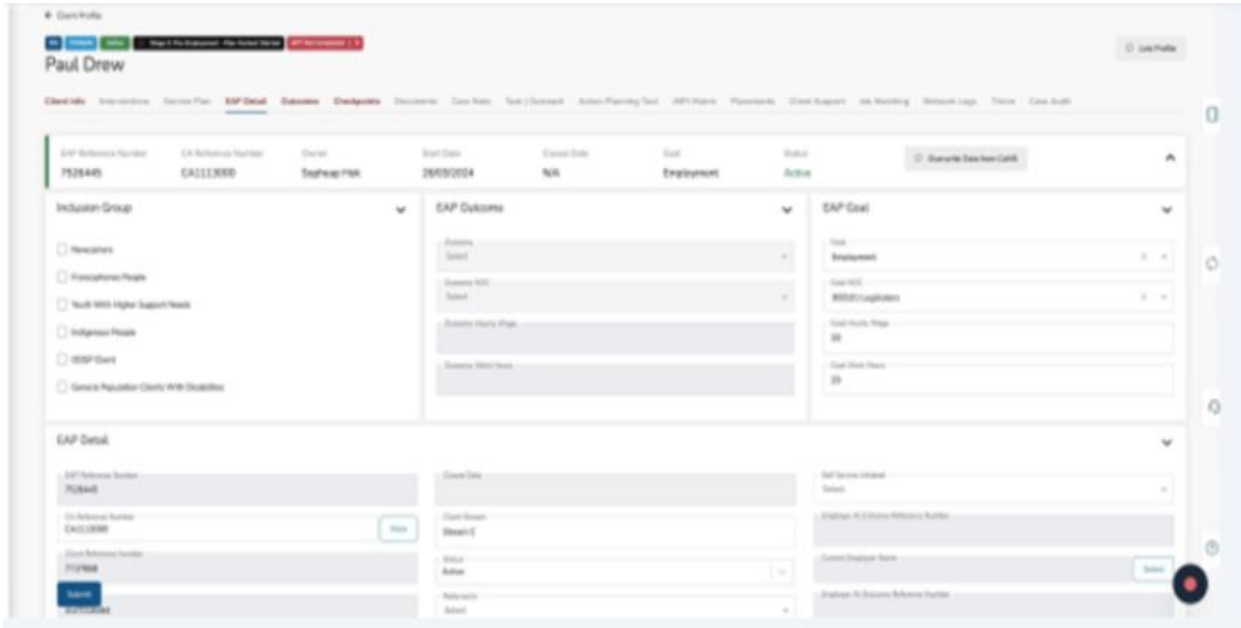
- Closure Reason: Select... (dropdown menu)
- Closure Rationale (1000 char. max): (text area)
- Submit: (blue button)
- Cancel: (white button)

5. Select a "Closure Reason."



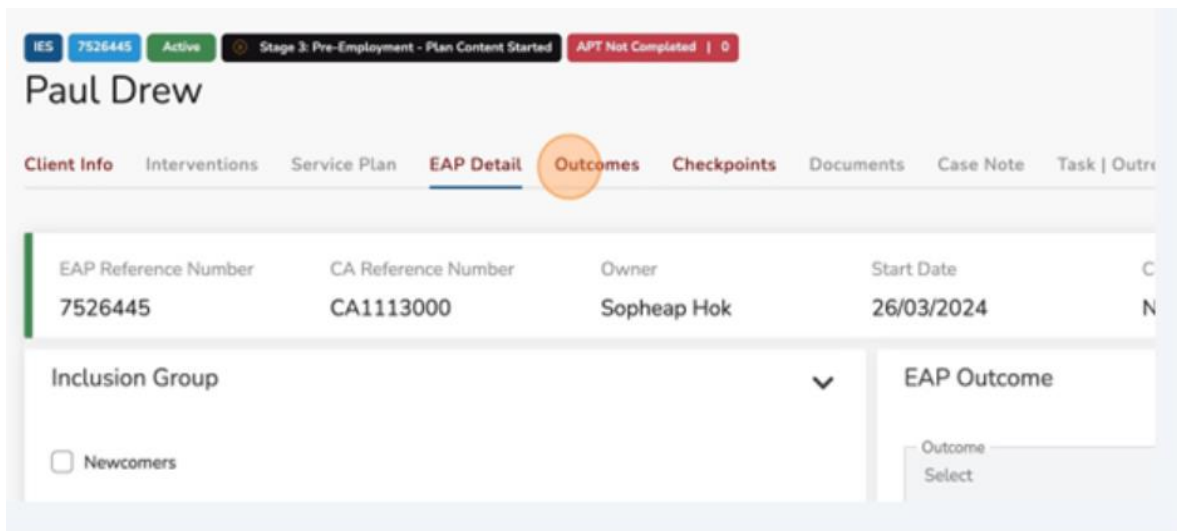
# (15) Create an Outcome for a Client

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."

N/A

Outcome Date

March 2024

Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Date is required.

employed or both?

3. How many jobs do you currently have?

Submit

3. Click the "Employment Situation" field.

Outcome Date: 26/03/2024

Outcome Reference Number: N/A

Current Employment: N/A

Outcome Date: 26/03/2024

EAP Reference Number: 7526445

Employment Situation: Select

1. Are you currently working at a job or business?  
Select

2. Are you currently working as an employee, self-employed or both?  
Select

4. Select the appropriate “Employment Situation.”

26/03/2024 N/A

Outcome Date  
26/03/2024

EAP Reference Number  
7526445

Employment Situation  
Select

**Client is employed at 20 hours or more per week**

Client completed all pre-employment activities in EAP but is not employed

Client completed all pre-employment activities in EAP but is employed below 20 hours per week

Client is employed at another employer at 20 hours or more per week

Select

Job Posting

Employer and Trainer

Stake Holders

Client Management

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

26/03/2024

Outcome Date  
26/03/2024

EAP Reference Number  
7526445

Employment Situation  
Client is employed at 20 hours or more per week

1. Are you currently working at a job or business?  
Select

2. Are you currently working as an employee, self-employed or both?  
Select

3. How many jobs do you currently have?

Employer and Trainer

Stake Holders

Client Management

6. Select the appropriate answer.

Employer and Trainer

EAP Reference Number  
7526445

Employment Situation  
Client is employed at 20 hours or more per week

1. Are you currently working at a job or business?

Select  
Yes  
No

3. How many jobs do you currently have?

4. How would you describe the work you do (i.e. your job title?)  
Select

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

Employer and Trainer

EAP Reference Number  
7526445

Employment Situation  
Client is employed at 20 hours or more per week

1. Are you currently working at a job or business?  
Yes

2. Are you currently working as an employee, self-employed or both?  
Select

3. How many jobs do you currently have?

4. How would you describe the work you do (i.e. your job title?)  
Select

8. Select the appropriate answer.

The screenshot shows a survey form with a sidebar menu on the left. The sidebar menu includes icons and labels for 'Stake Holders', 'Client Management', 'CaMS Explorer', and 'Workshop and Event'. The main form area contains the following questions and answers:

- Employment Situation: Client is employed at 20 hours or more per week
- 1. Are you currently working at a job or business? Yes
- 2. Are you currently working as an employee, self-employed or both? Employee (highlighted with an orange circle)
- 3. How would you describe the work you do (i.e. your job title?) Select
- 4. How would you describe the sector you work in? Submit

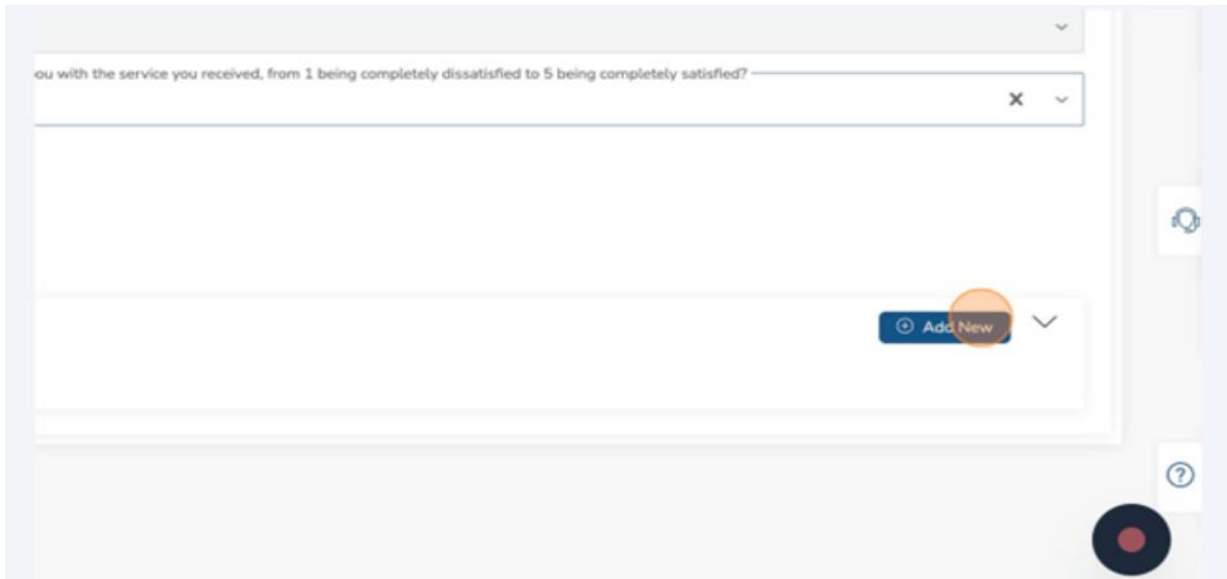
9. Click the “How many jobs do you currently have?” field.

The screenshot shows a survey form with a sidebar menu on the left. The sidebar menu includes icons and labels for 'Employer and Trainer', 'Stake Holders', 'Client Management', and 'CaMS Explorer'. The main form area contains the following questions and answers:

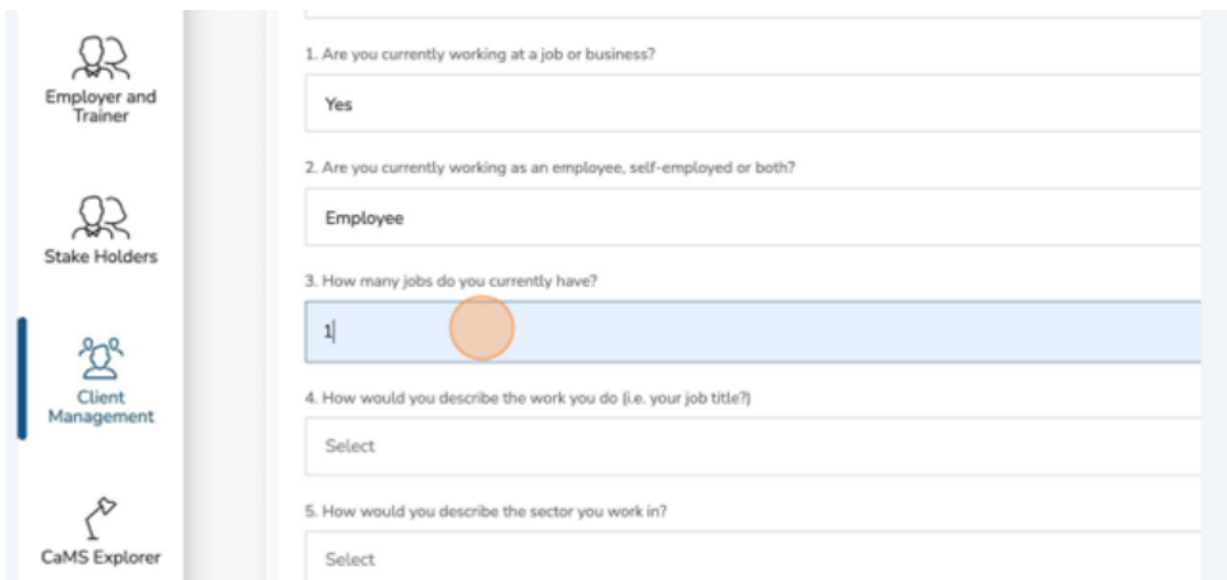
- 1. Are you currently working at a job or business? Yes
- 2. Are you currently working as an employee, self-employed or both? Employee
- 3. How many jobs do you currently have? (highlighted with an orange circle)
- 4. How would you describe the work you do (i.e. your job title?) Select
- 5. How would you describe the sector you work in? Select

- ✓ 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.”



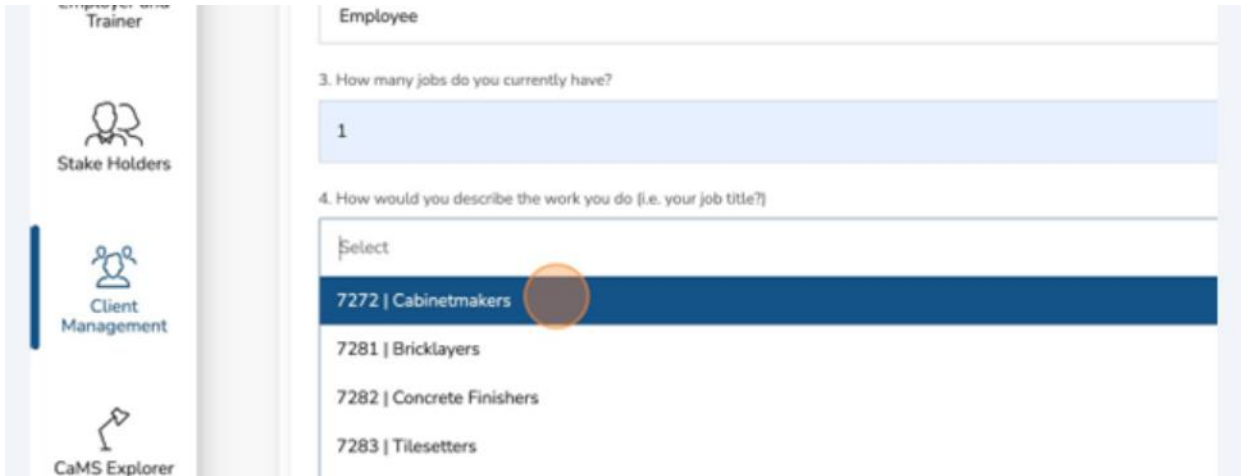
11. Input the appropriate number.



- ✓ 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

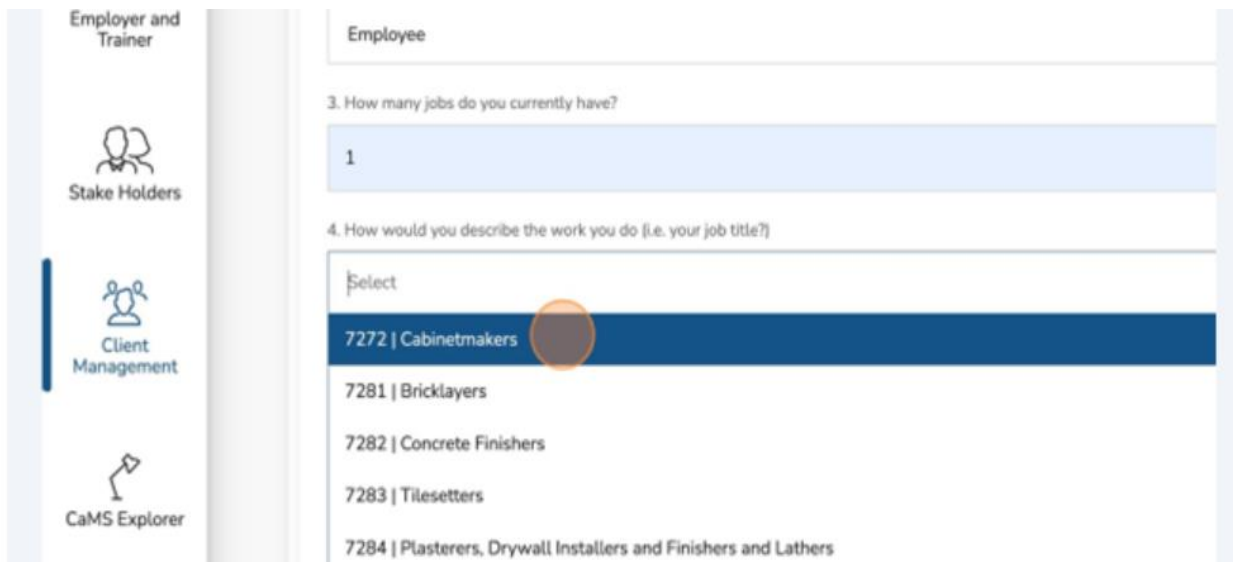
questionnaire for each job held. Please complete an additional Outcomes Jobs questionnaire for every job you report.

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



The screenshot shows a web interface with a sidebar on the left and a main content area on the right. The sidebar contains four menu items: 'Trainer', 'Stake Holders', 'Client Management', and 'CaMS Explorer'. The main content area is titled 'Employee' and contains two questions. Question 3, 'How many jobs do you currently have?', has a text input field containing the number '1'. Question 4, 'How would you describe the work you do (i.e. your job title?)', has a dropdown menu with a 'Select' placeholder. The dropdown is open, showing a list of job titles with their corresponding NOC codes: '7272 | Cabinetmakers', '7281 | Bricklayers', '7282 | Concrete Finishers', and '7283 | Tilesetters'. The '7272 | Cabinetmakers' option is highlighted in blue, and a mouse cursor is hovering over it.

13. Select the appropriate “NOC.”



The screenshot shows a web interface similar to the one above, but with an additional option in the dropdown menu. The sidebar contains four menu items: 'Employer and Trainer', 'Stake Holders', 'Client Management', and 'CaMS Explorer'. The main content area is titled 'Employee' and contains two questions. Question 3, 'How many jobs do you currently have?', has a text input field containing the number '1'. Question 4, 'How would you describe the work you do (i.e. your job title?)', has a dropdown menu with a 'Select' placeholder. The dropdown is open, showing a list of job titles with their corresponding NOC codes: '7272 | Cabinetmakers', '7281 | Bricklayers', '7282 | Concrete Finishers', '7283 | Tilesetters', and '7284 | Plasterers, Drywall Installers and Finishers and Lathers'. The '7272 | Cabinetmakers' option is highlighted in blue, and a mouse cursor is hovering over it.

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

The screenshot shows a sidebar on the left with four icons: 'Employer and Trainer', 'Stake Holders', 'Client Management', and 'CaMS Explorer'. The main content area contains question 4 with the answer '7272 | Cabinetmakers'. Question 5, 'How would you describe the sector you work in?', is highlighted with an orange circle and shows a 'Select' dropdown menu. Question 10 is partially visible below.

15. Select the appropriate sector.

The screenshot shows the same sidebar as above. Question 4 has the answer '7272 | Cabinetmakers'. Question 5 is expanded to show a list of sectors. An orange circle highlights the 'Select' dropdown, and a blue highlight is over the selected option: '311351 | Chocolate and Chocolate Confectionery Manufacturing from Cacao Beans'. Other options include '999999 | Unclassified Establishment', '311352 | Confectionery Manufacturing from Purchased Chocolate', '311824 | Flour Mixes, Dough, and Pasta Manufacturing from Purchased Flour', '315220 | Men's and Boys' Cut and Sew Clothing Manufacturing', '315249 | Women's and Girls' Cut and Sew Clothing Manufacturing', '315241 | Infants' Cut and Sew Clothing Manufacturing', and '315281 | Fur and Leather Clothing Manufacturing'.



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

The screenshot shows a web interface with a sidebar on the left containing four menu items: "Stake Holders", "Client Management", "CaMS Explorer", and "Workshop and Event". The main content area contains a form with the following elements:

- A text input field containing "7272 | Cabinetmakers".
- A question: "5. How would you describe the sector you work in?".
- A text input field containing "311351 | Chocolate and Chocolate Confectionery Manufacturing from Cacao Beans".
- A question: "10. When is the last time you were unemployed?".
- A text input field for the answer, which is currently empty and has an orange circle highlighting it.
- A section titled "Outcome Jobs".
- A "Submit" button at the bottom.

17. Select the appropriate date.

The screenshot shows the same web interface as above, but with a calendar widget overlaid on the form. The calendar displays the month of February, with the days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and the dates (25, 26, 27, 28, 29, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31). The date 25 is highlighted with an orange circle, and the date 26 is highlighted with a dark blue square. The form fields are partially visible behind the calendar.

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

20 hours

11. How many times have you changed employment since you were last unemployed?

12. Are you currently attending a school, college, university, apprenticeship or other training program?

Select

13. How would you best describe the education or training you are attending?

Select

EAP student status other text to describe the education or training you are attending

19. Insert the appropriate number.

Employer at 20 hours or more per week

Employer at Outcome also contains a value and these values should be different. Both these fields must be populated before adding an Outcome. (If you auto-generate the checkpoints.)

Current Employment

Client is employed at 20 hours or more per week

11. How many times have you changed employment since you were

0

12. Are you currently attending a school, college, university, apprenti

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

The screenshot shows a form with several input fields on the left and a list of questions on the right. Question 12, "Are you currently attending a school, college, university, apprenticeship or other training program?", is highlighted in blue. An orange circle is drawn around the "Select" text in the dropdown menu for this question. Other questions visible include "11. How many times have you changed employment since you were last unemployed?" with "0" selected, and "14. Are you enrolled as a full-time or part-time student?" with "Select" in the dropdown.

21. Select the appropriate answer.

The screenshot shows the same form as above, but now question 12 is selected and the "Yes" option in the dropdown menu is highlighted in dark blue. An orange circle is drawn around the "Yes" text. The "0" option for question 11 is still selected. Question 14 now has "Select" in its dropdown menu. The form also includes a text input field for "EAP student status other text to describe the education or training you are attending".

- ❖ 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.

The screenshot shows a questionnaire interface with three questions. Question 14 asks if the user is a full-time or part-time student. Question 15 asks for the best description of their current employment situation. Question 16 asks for satisfaction with the service received, with a scale from 1 (completely dissatisfied) to 5 (completely satisfied). An orange circle highlights the 'Select' dropdown for question 16. A 'Response required' label is positioned to the right of the question.

23. Select the appropriate answer.

The screenshot shows the dropdown menu for question 16. The options are: Select, Completely dissatisfied, Dissatisfied, Neutral, Satisfied, Completely satisfied, and Prefer not to answer. The 'Completely satisfied' option is highlighted with a blue background and an orange circle.

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

The screenshot shows a survey interface with a sidebar on the left containing icons for 'Calendar', 'Job Posting', 'Employer and Trainer', and 'Stake Holders'. The main form area contains the following fields:

- Job ID: 1
- Job ID: 1
- Are you looking to change your current employment in foreseeable future ?  
Select (highlighted with an orange circle)
- Excluding overtime, on average, how many paid hours do you usually work per week?  
0
- Not Sure
- What is your hourly wage (including tips and commissions), before taxes and other deductions? wage?  
0

25. Select the appropriate answer.

This screenshot shows the same survey form as above, but with the 'Are you looking to change your current employment in foreseeable future ?' dropdown menu expanded. The 'Yes' option is selected and highlighted in blue. The other options are 'No', 'Not Sure', and 'Not Sure' (with a radio button). The 'What is your hourly wage...' field now includes a 'Prefer not to say' option with a radio button.

- Job ID: 1
- Job ID: 1
- Are you looking to change your current employment in foreseeable future ?  
Yes (highlighted in blue)  
No  
Not Sure  
 Not Sure
- What is your hourly wage (including tips and commissions), before taxes and other deductions? wage?  
0  
 Prefer not to say

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

Calendar

Job Posting

Employer and Trainer

Stake Holders

1

Job ID

1

Are you looking to change your current employment in foreseeable future ?

No

Excluding overtime, on average, how many paid hours do you usually work per week?

0

Not Sure

What is your hourly wage (including tips and commissions), before taxes and other deductions? wage?

0

Prefer not to say

26. Input the appropriate answer.

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

Trainer

Stake Holders

Client Management

CaMS Explorer

Not Sure

What is your hourly wage (including tips and commissions), before taxes and other deductions? wage?

20

Prefer not to say

How would you best describe the nature of your job?

Select

Permanent Job

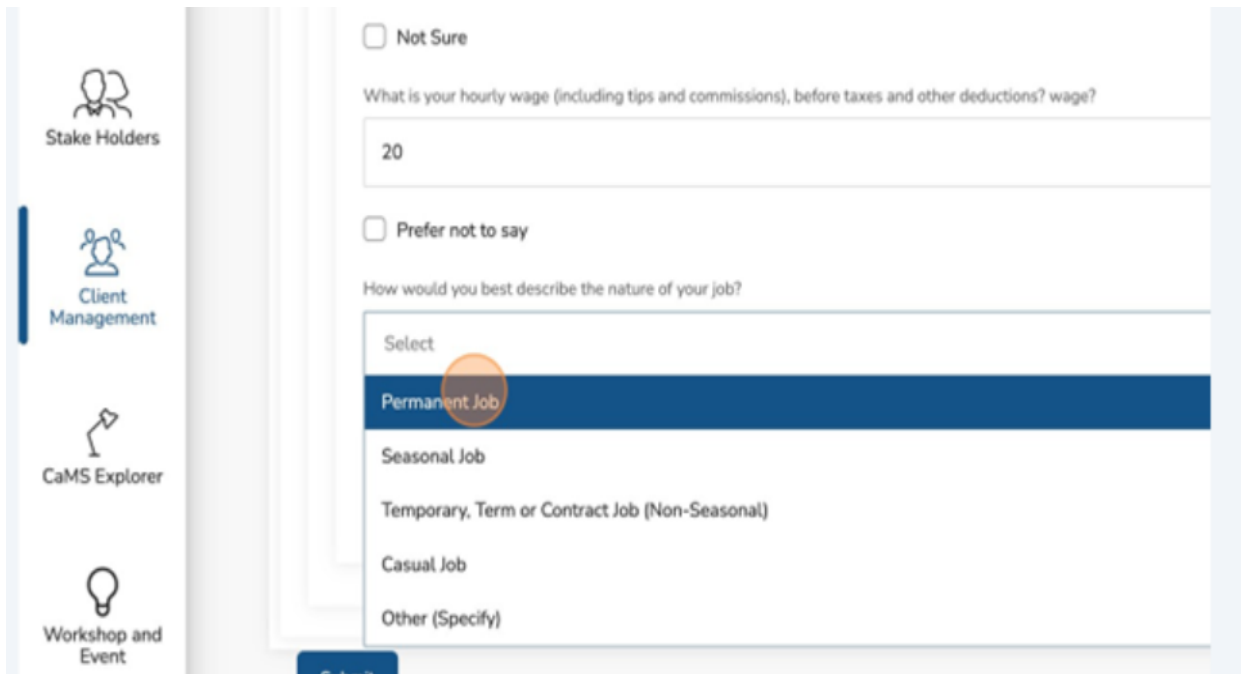
Seasonal Job

Temporary, Term or Contract Job (Non-Seasonal)

Casual Job

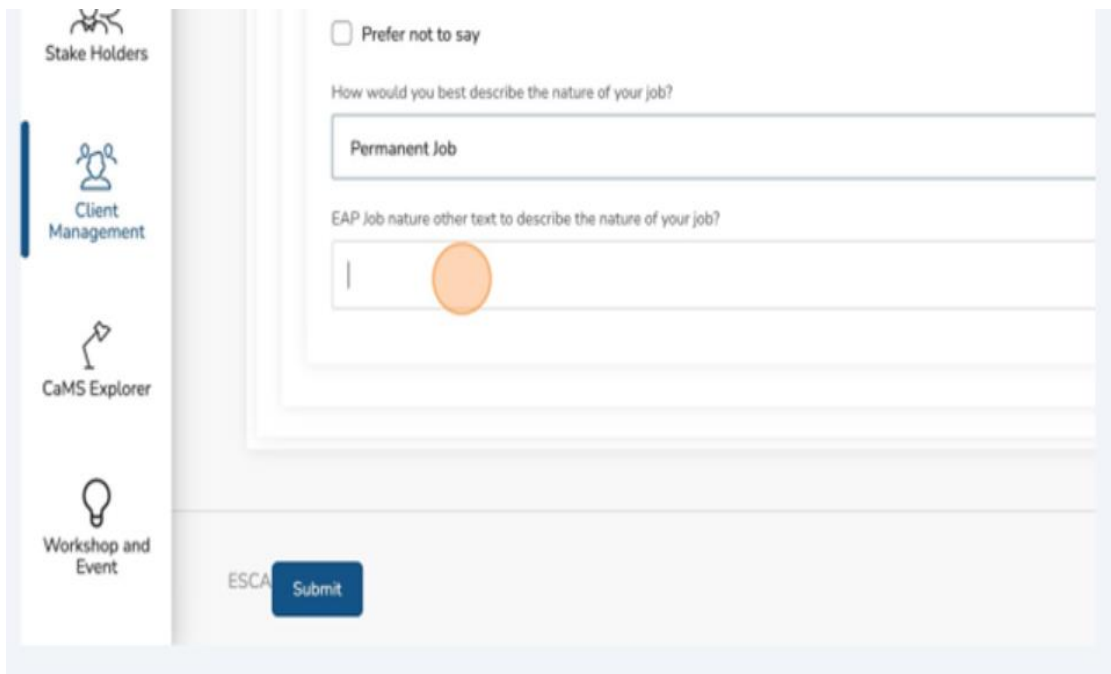
Other (Specify)

28. Select the appropriate answer.



The screenshot shows a survey interface with a sidebar on the left containing four menu items: Stake Holders, Client Management, CaMS Explorer, and Workshop and Event. The main content area contains two questions. The first question is "What is your hourly wage (including tips and commissions), before taxes and other deductions? wage?" with a text input field containing the number "20". Below this is a radio button labeled "Not Sure". The second question is "How would you best describe the nature of your job?" with a dropdown menu. The dropdown menu is open, showing a list of options: "Select", "Permanent Job", "Seasonal Job", "Temporary, Term or Contract Job (Non-Seasonal)", "Casual Job", and "Other (Specify)". The "Permanent Job" option is highlighted in blue and has an orange circle around it. A "Submit" button is visible at the bottom of the form.

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



The screenshot shows the same survey interface as in the previous image. The dropdown menu for the second question is now closed, and the text "Permanent Job" is displayed in the input field. Below this is a radio button labeled "Prefer not to say". The third question is "EAP job nature other text to describe the nature of your job?" with a text input field that is currently empty and has an orange circle around it. A "Submit" button is visible at the bottom of the form.

30. Input the appropriate answer.

31. Click "Submit."

The screenshot shows a web interface with a sidebar on the left containing four menu items: "Stake Holders" (with a person icon), "Client Management" (with a person and gear icon), "CaMS Explorer" (with a magnifying glass icon), and "Workshop and Event" (with a lightbulb icon). The main content area contains a form with the following elements:

- A text input field containing the number "20".
- A checkbox labeled "Prefer not to say" which is unchecked.
- A question: "How would you best describe the nature of your job?"
- A text input field containing "Permanent Job".
- A question: "EAP Job nature other text to describe the nature of your job?"
- A text input field containing "This is a full time job."

At the bottom of the page, there is a logo for "ESCA" and a partially visible "Submit" button.

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

The screenshot shows a confirmation message and a progress bar. The message box contains the text: "We've sent your update request to CaMS. While it's in progress, the fields will be locked. Feel free to work on another tab while you wait for it to finish." Below the message is a progress bar with four stages: "Submit" (with a checkmark), "Queued" (with a dot), "Processing" (with a dot), and "Complete" (with a dot). The text "You are now first in the queue" is displayed below the progress bar. A "Submitted" label is visible at the bottom left of the message box. Below the message box, there is a table with the following content:

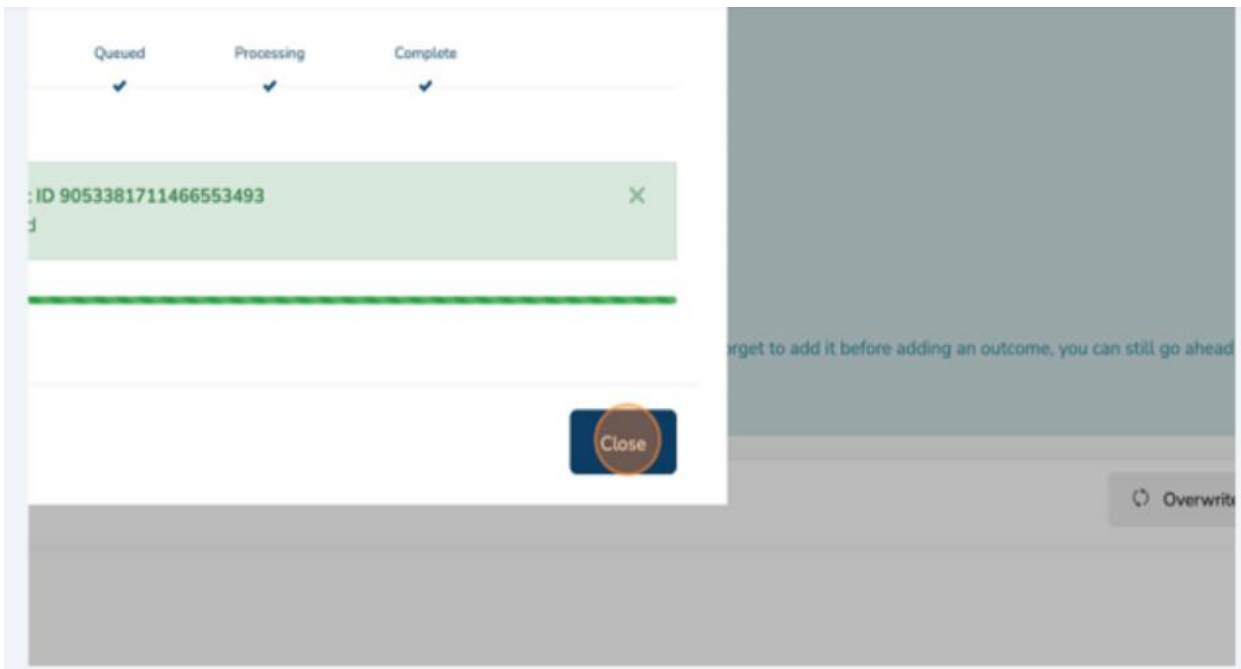
Reference Number	Current Employment
	Client is employed at 20 hours or more per week

Below the table, there are two questions with input fields:

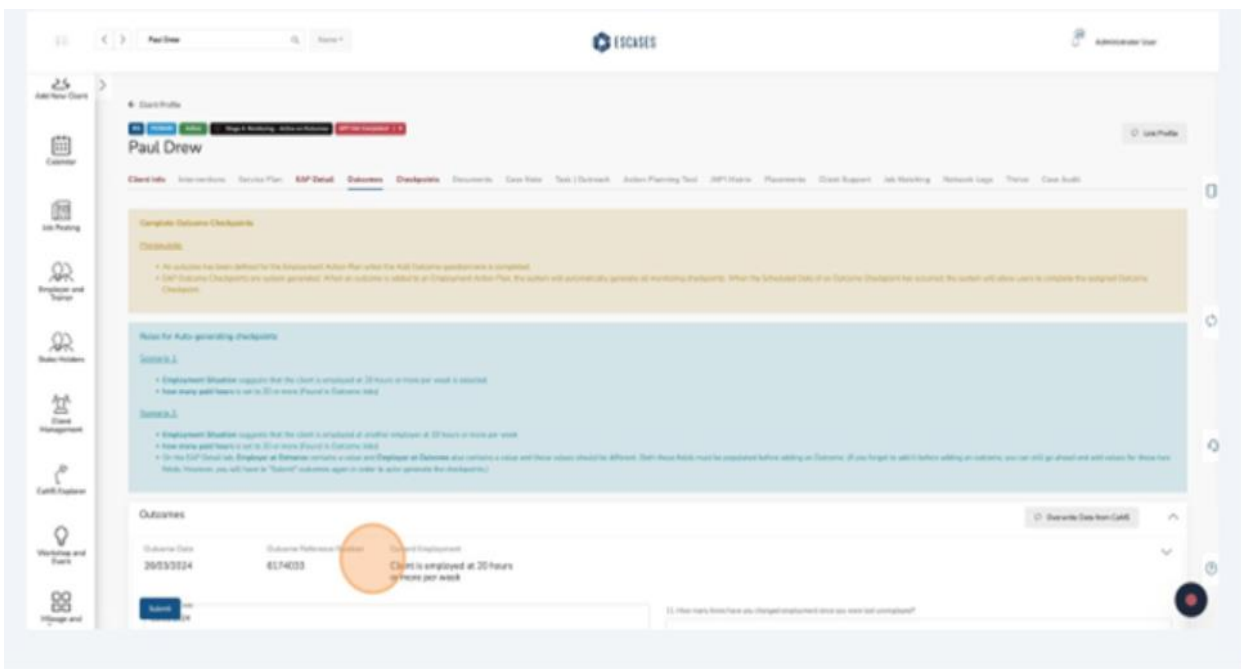
- Question 11: "How many times have you changed employment since you were last unemployed?" with an input field containing "0".
- Question 12: "Are you currently attending a school, college, university, apprenticeship or other training program?" with an input field containing "No".



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

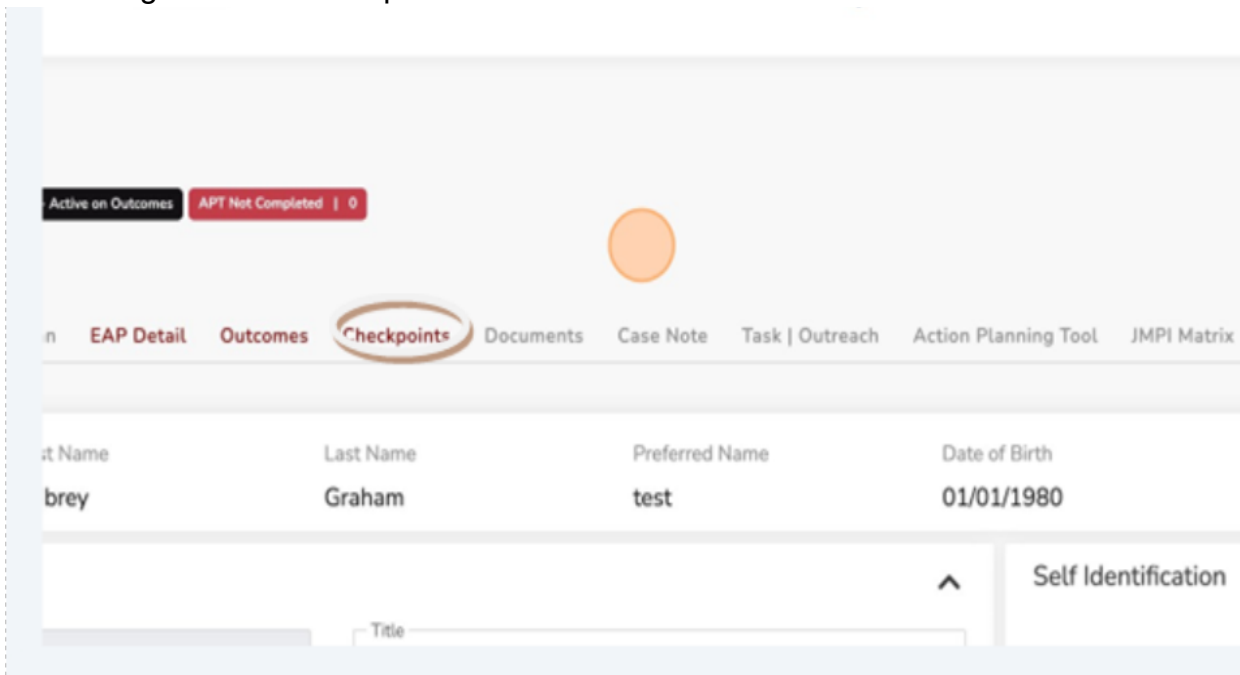


34. You have successfully submitted the Outcome.

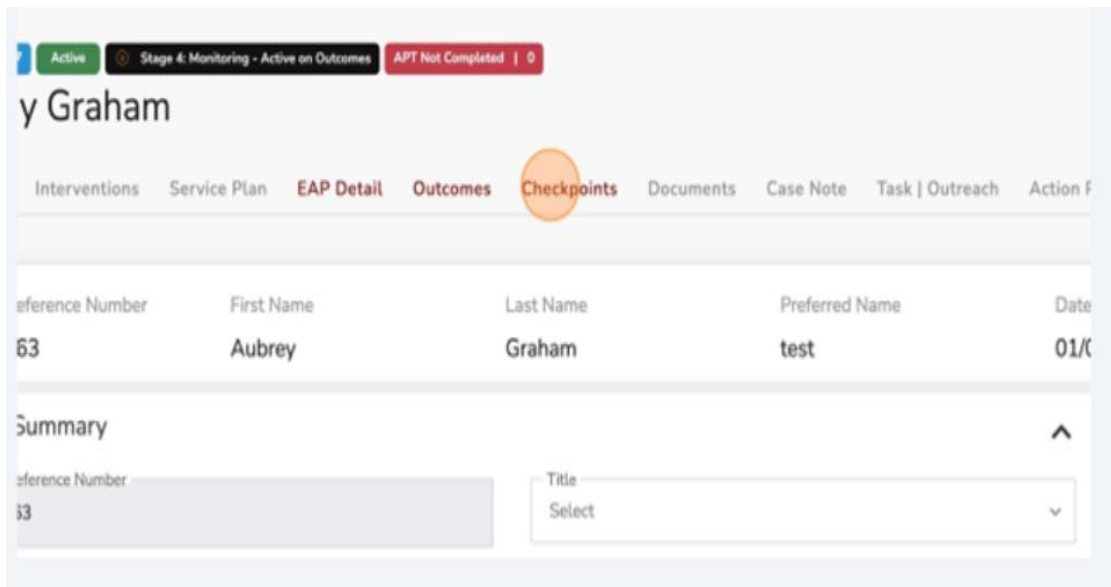


# (16) Checkpoint and Document Upload

1. Navigate to the client profile.

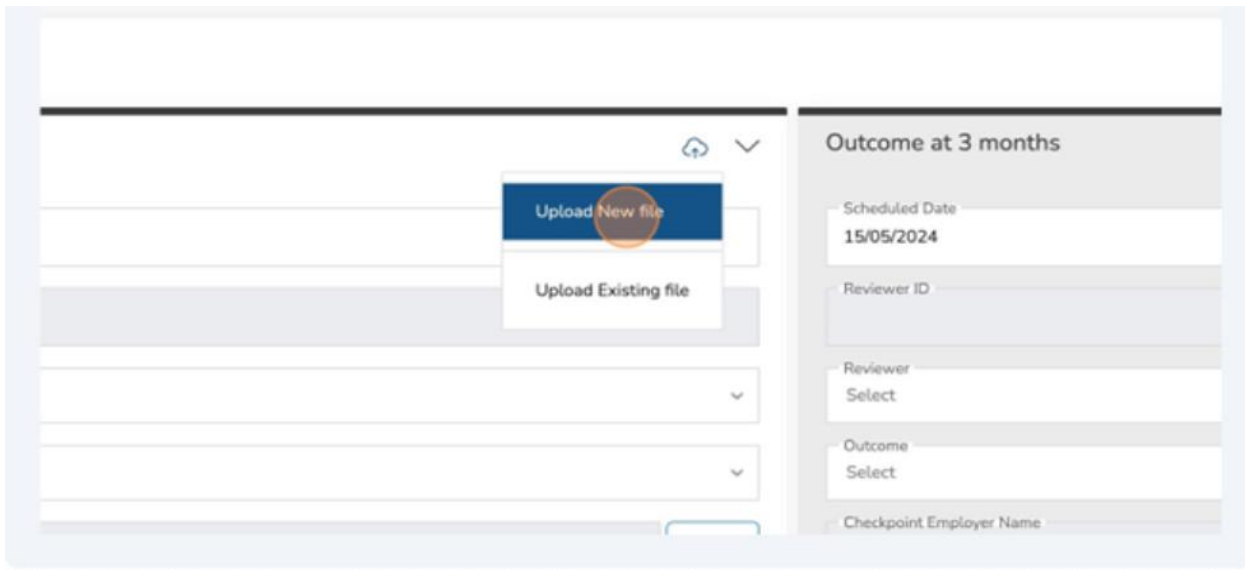


2. Click "Checkpoints."



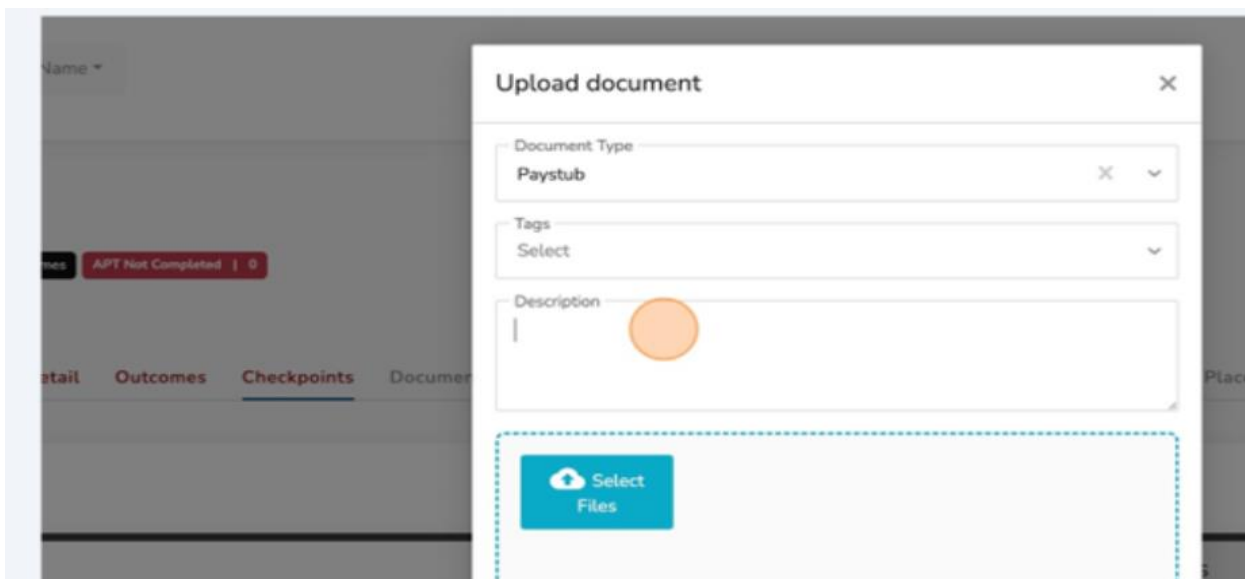
To upload proof of employment, complete the following steps:

3. Click "Upload New file."



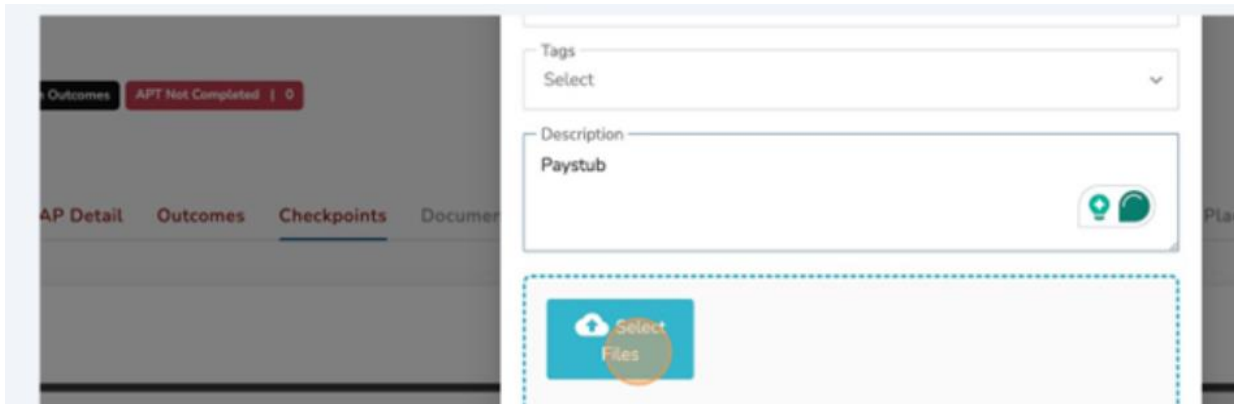
4. Select the appropriate "Document Type."

5. Click the "Description" field.

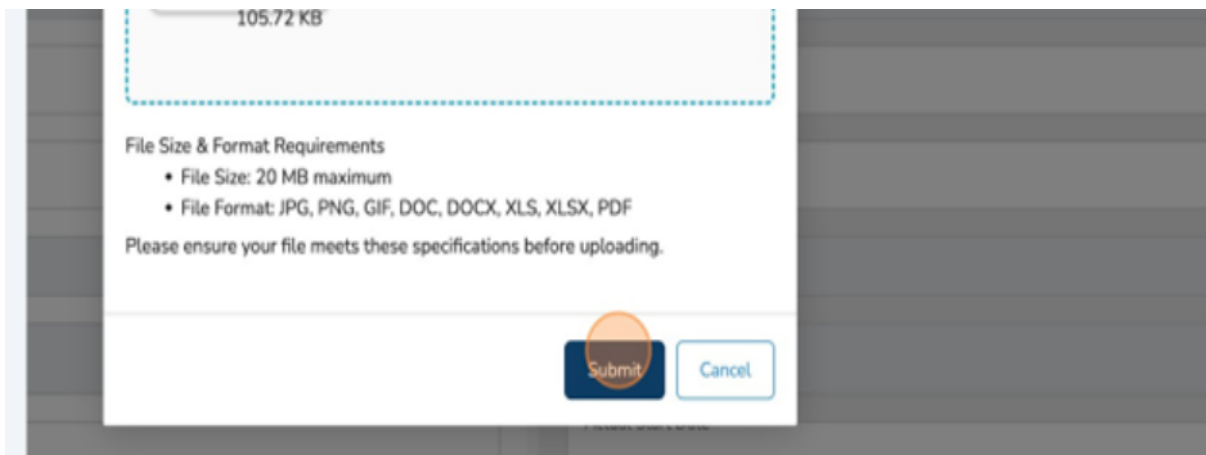


6. Input the appropriate description for the attachment.

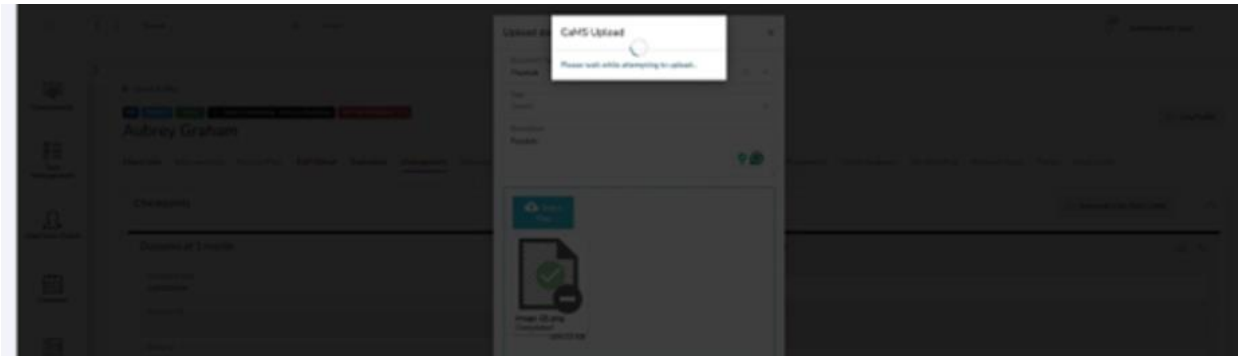
7. Click the “Select Files” button and select the appropriate attachment.



8. Click “Submit.”

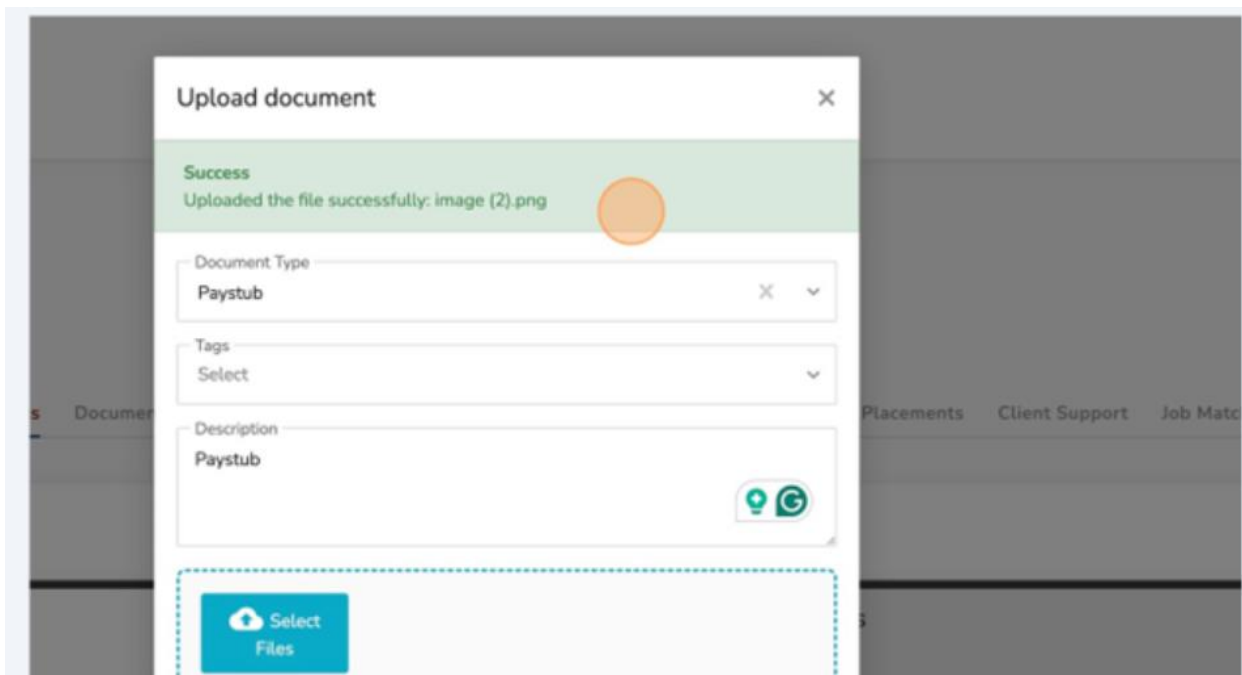


The attachment will be uploaded directly into CaMS.

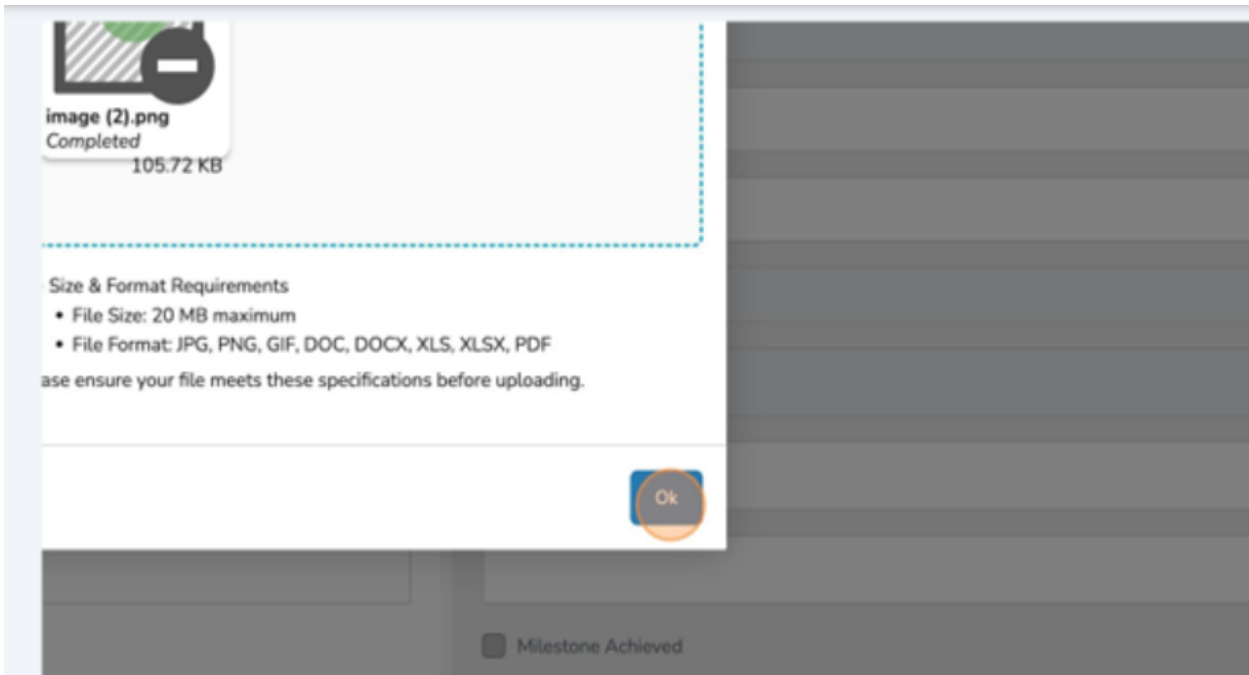


- ❖ Tip! Uploads directly into CaMS display a primary focus while the action is taking place to signify the importance.

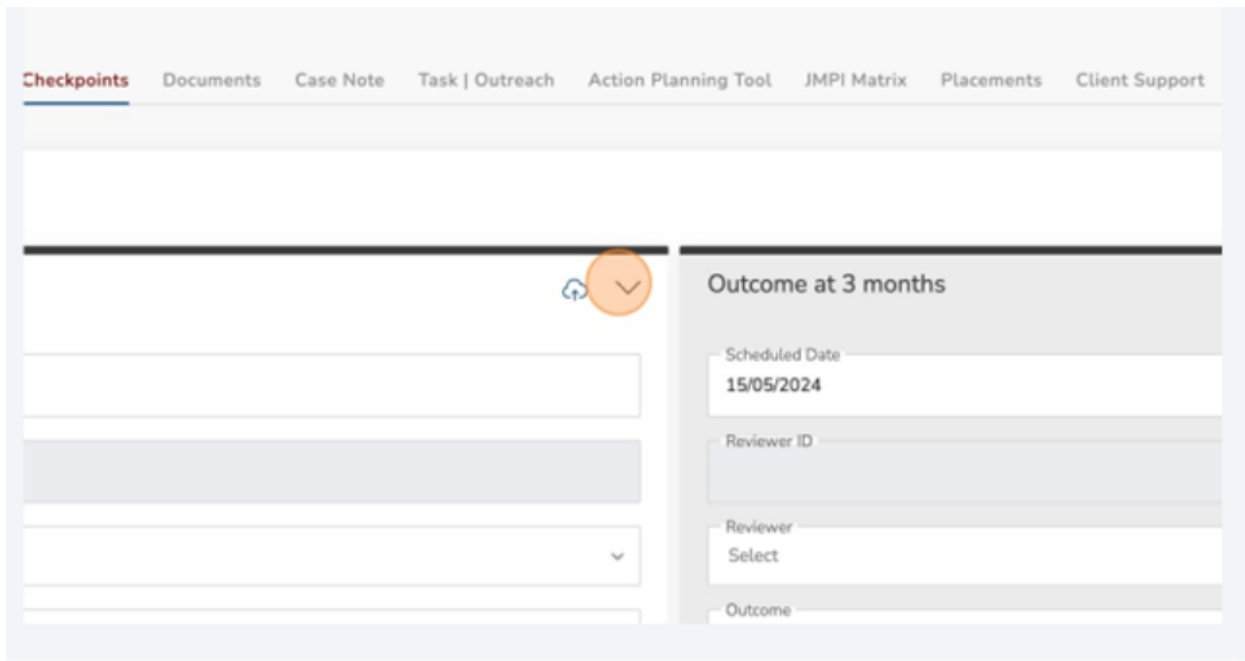
A success notification will be displayed.



9. Click "OK."



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



11. Click the "Reviewer" field.

The screenshot shows a web application interface. On the left is a vertical sidebar with icons and labels: 'Add New Client', 'Calendar', 'Job Posting', 'Employer and Trainer', and 'Stake Holders'. The main content area is titled 'Outcome at 1 month' and contains several input fields: 'Scheduled Date' (15/03/2024), 'Reviewer ID', 'Reviewer' (with 'Select' and an orange circle), 'Outcome' (with 'Select'), 'Checkpoint Employer Name' (N/A), and 'Checkpoint Employer ID'.

12. Select the appropriate "Reviewer."

This screenshot shows the same form as above, but the 'Reviewer' field now contains the text 'sop'. A dropdown menu is open below the input, showing a list of names. The name 'Sopheap Hok' is highlighted in a dark blue bar, indicating it has been selected. The rest of the form fields remain the same as in the previous screenshot.

13. Click the “Outcome” field.

Calendar

Job Posting

Employer and Trainer

Stake Holders

Scheduled Date  
15/03/2024

Reviewer ID  
IAAT018464

Reviewer  
Sopheap Hok

Outcome  
Select

Unemployed

Not in the Labour Force

Unable to Contact Client

Employed

Actual End Date

14. Select the appropriate “Outcome.”

Employer and Trainer

Stake Holders

Client Management

Outcome  
Select

Unemployed

Not in the Labour Force

Unable to Contact Client

Employed

Actual End Date

Milestone Achieved

Submit Achieved:



15. Click the "Actual Start Date."

The screenshot shows a sidebar on the left with icons and labels: Job Posting, Employer and Trainer, Stake Holders, and Client Management. The main form area contains the following fields and sections:

- Sopheap Hok
- Outcome: Employed
- Checkpoint Employer Name: N/A
- Checkpoint Employer ID
- Actual Start Date (highlighted with an orange circle)
- Actual End Date
- Milestone Achieved (checkbox)
- Milestone Achieved:
- Customer Survey
- Submit button

16. Select the appropriate start date.

The screenshot shows a sidebar on the left with icons and labels: Calendar, Job Posting, Employer and Trainer. The main form area displays a calendar for March 2024. The date 26 is highlighted with an orange circle. Below the calendar are the 'Actual Start Date' and 'Actual End Date' input fields.

March 2024						
Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

17. Click the "Actual End Date" field.

The screenshot shows a software interface with a sidebar on the left containing icons for 'Job Posting', 'Employer and Trainer', 'Stake Holders', and 'Client Management'. The main area features a calendar for March 2024 with the date 26 highlighted in blue. Below the calendar is a form with a text input field labeled 'Actual End Date' which has an orange circle around it. There is also a checkbox for 'Milestone Achieved' and a section for 'Milestone Achieved:' containing a 'Customer Survey' form with a 'Submit' button.

18. Enter the end date.

This screenshot is similar to the previous one, but the 'Actual End Date' field is now empty. The sidebar includes a 'Calendar' icon at the top. The calendar for March 2024 is shown with the date 26 highlighted in orange. The 'Milestone Achieved' checkbox and the 'Customer Survey' section are also visible.

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

The screenshot shows a web application interface. On the left is a vertical sidebar with five icons and their corresponding labels: a calendar icon for "Calendar", a document icon for "Job Posting", an icon of two people for "Employer and Trainer", another icon of two people for "Stake Holders", and an icon of a person for "Client". The main content area contains several form fields. The first field is "Outcome Checkpoint Reference Id" with the value "-9198514088995454976". The second field is "Outcome Ckp Reference Number" with the value "6172526". Below these is question 1: "1. Are you currently working at a job or business?". It has a dropdown menu with "Select" as the current selection, and two options, "Yes" and "No", listed below. An orange circle highlights the "Select" text. Below question 1 is question 3: "3. How many jobs do you currently have?" with a text input field containing the number "0". Below question 3 is question 4: "4. How would you describe the work you do (i.e. your job title?)" with a text input field containing "0".

20. Select the appropriate answer.

This screenshot is identical to the one above, but the "Yes" option for question 1 is now selected. The "Yes" option is highlighted with a dark blue background, and the orange circle is now positioned over the "Yes" text. The "Select" text in the dropdown menu is no longer highlighted.

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

Job Posting

Employer and Trainer

Stake Holders

Client Management

Outcome Ckp Reference Number  
6172526

1. Are you currently working at a job or business?  
Yes

2. Are you currently working as an employee, self-employed or both?  
Select  
Employee  
Self-employed  
Both

4. How would you describe the work you do (i.e. your job title?)  
Select

Submit

5. How would you describe the sector you work in?

22. Select the appropriate answer.

Job Posting

Employer and Trainer

Stake Holders

Client Management

6172526

1. Are you currently working at a job or business?  
Yes

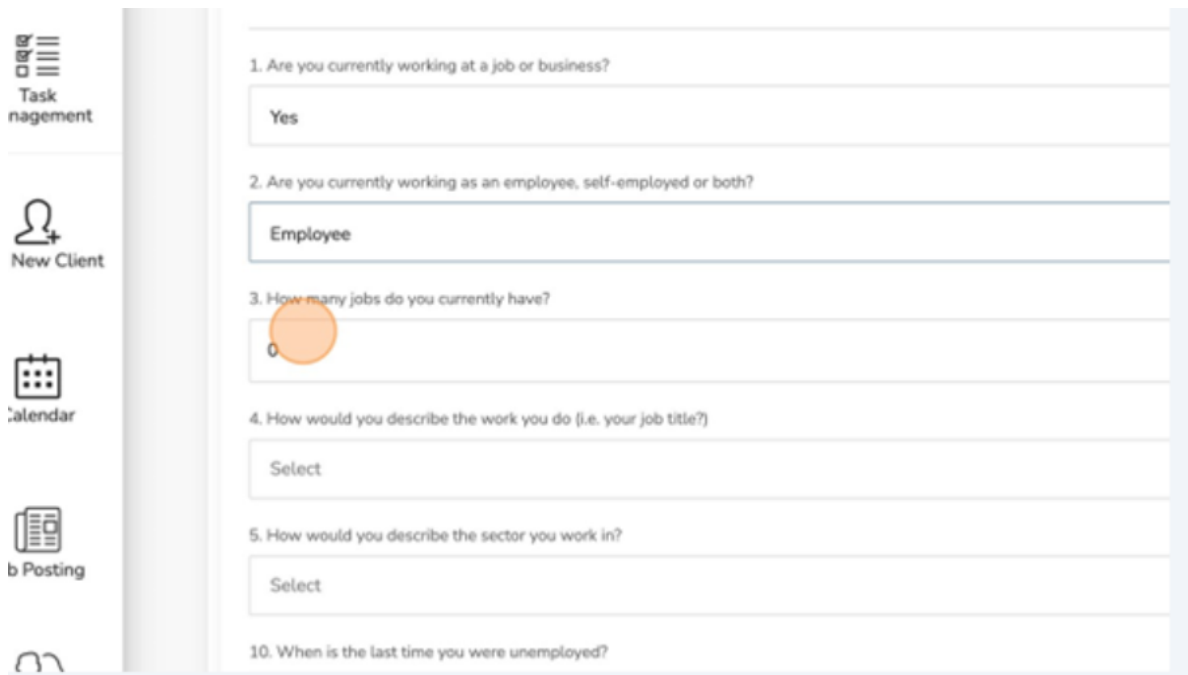
2. Are you currently working as an employee, self-employed or both?  
Select  
Employee  
Self-employed  
Both

4. How would you describe the work you do (i.e. your job title?)  
Select

Submit

5. How would you describe the sector you work in?

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



The screenshot shows a sidebar on the left with icons for 'Task nagement', 'New Client', 'Calendar', 'Job Posting', and 'Employer and Trainer'. The main form area contains several questions. Question 3, 'How many jobs do you currently have?', has a text input field containing the number '0'. An orange circle highlights the '0' in the input field.

1. Are you currently working at a job or business?  
Yes

2. Are you currently working as an employee, self-employed or both?  
Employee

3. How many jobs do you currently have?  
0

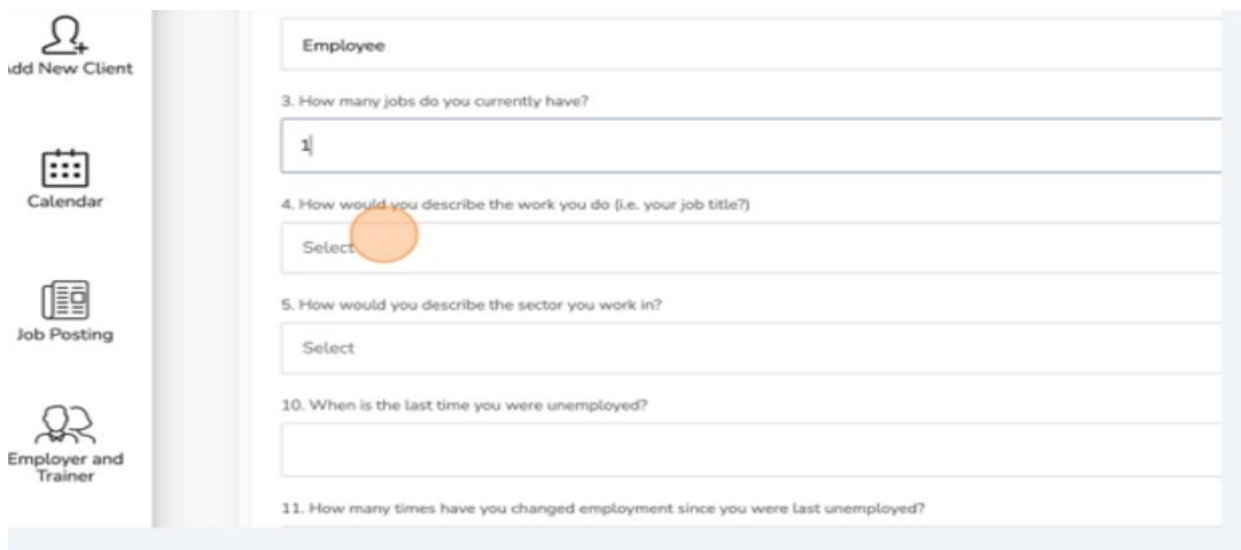
4. How would you describe the work you do (i.e. your job title?)  
Select

5. How would you describe the sector you work in?  
Select

10. When is the last time you were unemployed?

24. Insert the appropriate answer.

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



The screenshot shows the same sidebar as the previous image. In the main form area, question 3 now has the number '1' in the input field. Question 4, 'How would you describe the work you do (i.e. your job title?)', has a text input field containing the word 'Select'. An orange circle highlights the 'Select' text in the input field.

Add New Client

Calendar

Job Posting

Employer and Trainer

Employee

3. How many jobs do you currently have?  
1

4. How would you describe the work you do (i.e. your job title?)  
Select

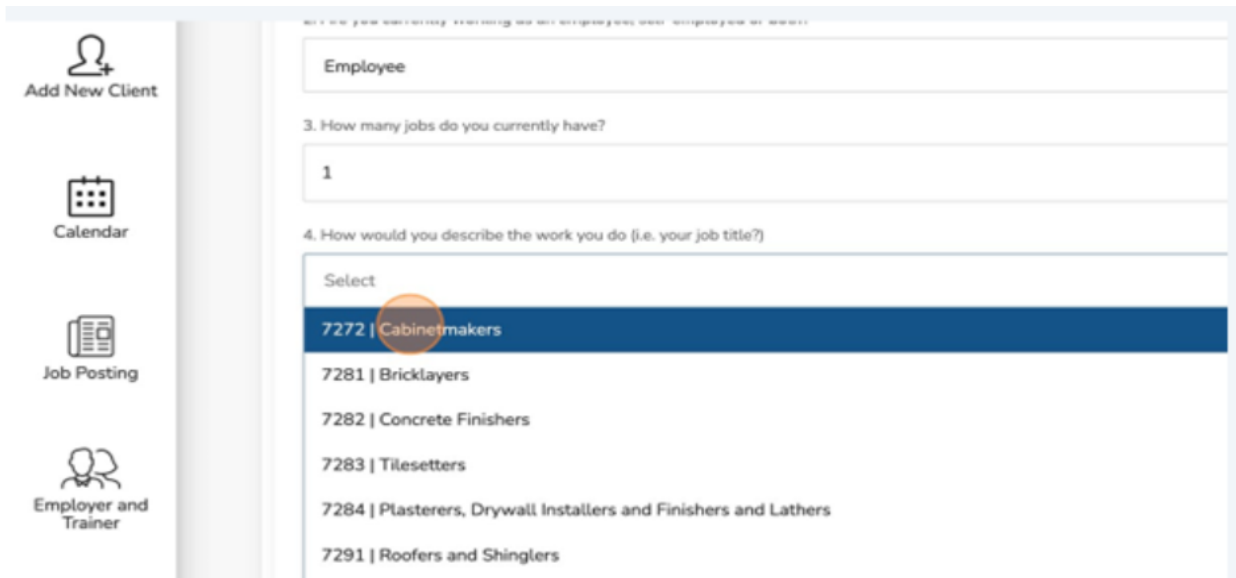
5. How would you describe the sector you work in?  
Select

10. When is the last time you were unemployed?

11. How many times have you changed employment since you were last unemployed?

26. Select the appropriate answer

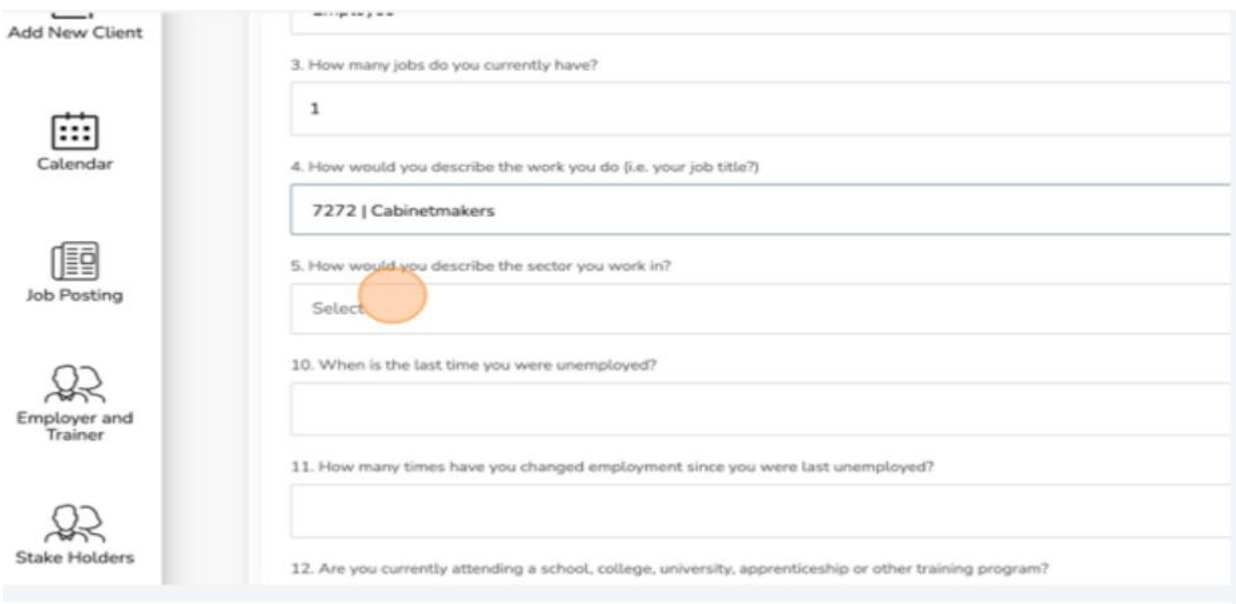
27. Select the appropriate NOC.



The screenshot shows a web form with a sidebar on the left containing navigation icons: 'Add New Client', 'Calendar', 'Job Posting', 'Employer and Trainer', and 'Stake Holders'. The main form area contains the following fields:

- A text field containing 'Employee'.
- Question 3: 'How many jobs do you currently have?' with a text input field containing '1'.
- Question 4: 'How would you describe the work you do (i.e. your job title?)' with a dropdown menu. The dropdown is open, showing a list of NOC codes and titles: '7272 | Cabinetmakers' (highlighted in blue), '7281 | Bricklayers', '7282 | Concrete Finishers', '7283 | Tilesetters', '7284 | Plasterers, Drywall Installers and Finishers and Lathers', and '7291 | Roofers and Shinglers'.

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



The screenshot shows the same web form as above, but with the dropdown menu for question 4 closed. The dropdown menu for question 5, 'How would you describe the sector you work in?', is now open, showing a list of options starting with 'Select'. An orange circle highlights the 'Select' text in the dropdown menu.

29. Select the appropriate sector.

7272 | Cabinetmakers

5. How would you describe the sector you work in?

Select

- 999999 | Unclassified Establishment
- 311351 | Chocolate and Chocolate Confectionery Manufacturing from Cacao Beans**
- 311352 | Confectionery Manufacturing from Purchased Chocolate
- 311824 | Flour Mixes, Dough, and Pasta Manufacturing from Purchased Flour
- 315220 | Men's and Boys' Cut and Sew Clothing Manufacturing
- 315249 | Women's and Girls' Cut and Sew Clothing Manufacturing
- 315241 | Infants' Cut and Sew Clothing Manufacturing
- 315281 | Fur and Leather Clothing Manufacturing
- 315289 | All Other Cut and Sew Clothing Manufacturing

Job Posting

Employer and Trainer

Stake Holders

Client

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

Calendar

Job Posting

Employer and Trainer

Stake Holders

4. How would you describe the work you do (i.e. your job title?)

7272 | Cabinetmakers

5. How would you describe the sector you work in?

311351 | Chocolate and Chocolate Confectionery Manufacturing from Cacao Beans

10. When is the last time you were unemployed?

11. How many times have you changed employment since you were last unemployed?





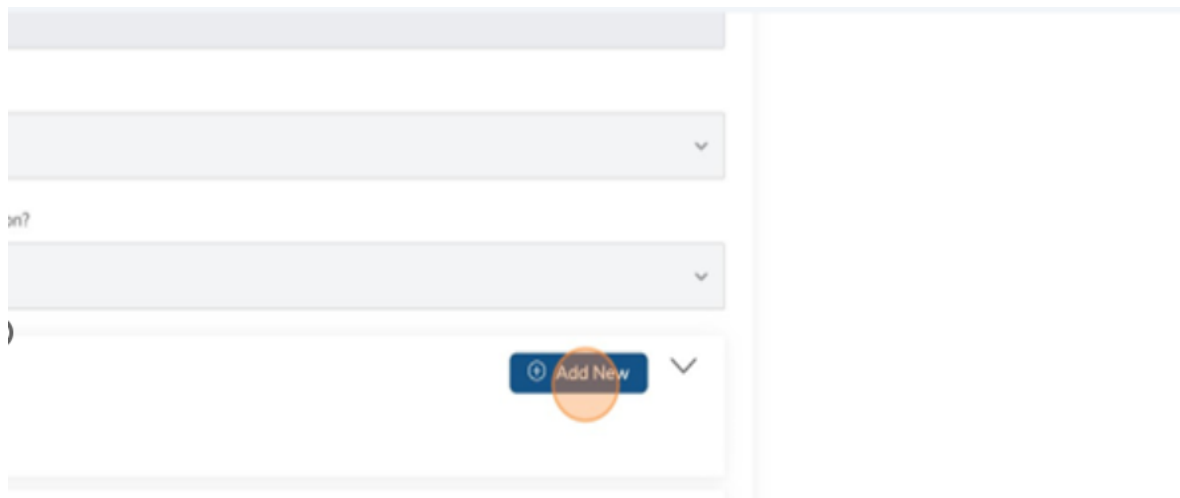
34. Click the “Are you currently attending a school, college, or university...?” field.

The image shows a screenshot of a web-based form titled "Add New Client". On the left is a vertical sidebar with four icons and labels: a calendar icon labeled "Calendar", a document icon labeled "Job Posting", an icon of two people labeled "Employer and Trainer", and a speech bubble icon. The main form area contains several input fields. At the top, a date field contains "25/03/2024". Below it, question 11 asks "How many times have you changed employment since you were last unemployed?" with a text input field containing "0". Question 12 asks "Are you currently attending a school, college, university, apprenticeship or other training program?" and has a dropdown menu with "Select" highlighted in orange, and options "Yes" and "No" below it. Below question 12 is a text input field with the placeholder "EAP student status other text to describe the education or training you are attending". Question 14 asks "Are you enrolled as a full-time or part-time student?" with a dropdown menu showing "Select".

35. Select the appropriate answer.

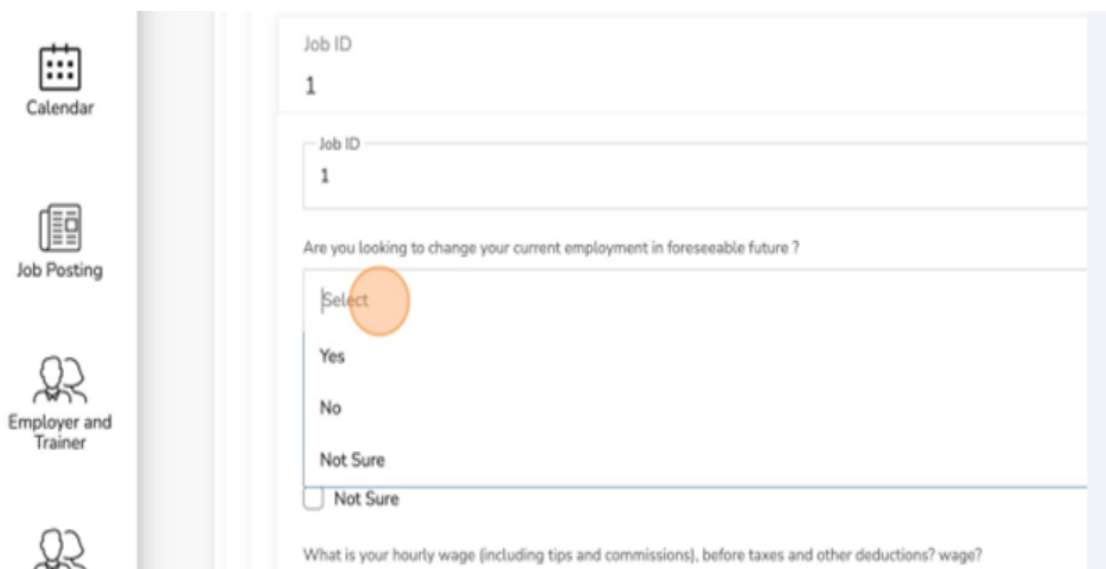
- ❖ Tip: The questions vary as they are guided by conditional logic. This means certain questions will only appear based on specific answers being supplied.
- Alert! Should your response to Question 3 (How many jobs do you currently have?) be one or more, it is mandatory to fill out the Checkpoints Jobs 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.”



A screenshot of a web form interface. It features several light gray input fields stacked vertically. The bottom-most field contains a blue button with a white plus icon and the text "Add New", which is circled in orange. To the right of the button is a small downward-pointing chevron icon. The form is partially obscured by a vertical line on the right side.

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



A screenshot of a web form interface. On the left is a vertical sidebar with four icons: a calendar, a document with a checklist, two people, and two people with a speech bubble. The main form area contains two "Job ID" fields, both with the value "1". Below these is a question: "Are you looking to change your current employment in foreseeable future ?". A dropdown menu is open, showing the word "Select" circled in orange, followed by the options "Yes", "No", and "Not Sure". At the bottom of the form is a text input field with the label "What is your hourly wage (including tips and commissions), before taxes and other deductions? wage?".

38. Select the appropriate answer.

Job ID  
1

Are you looking to change your current employment in foreseeable future ?

Select

Yes

**No**

Not Sure

Not Sure

What is your hourly wage (including tips and commissions), before taxes and other deductions? wage?

0

Prefer not to say

Wage cannot be zero

How would you best describe the nature of your job?

Calendar

Job Posting

Employer and Trainer

Stake Holders

Client

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

1

Job ID  
1

Are you looking to change your current employment in foreseeable future ?

No

Excluding overtime, on average, how many paid hours do you usually work per week?

0

Not Sure

What is your hourly wage (including tips and commissions), before taxes and other deductions? wage?

0

Prefer not to say

Wage cannot be zero

How would you best describe the nature of your job?

Calendar

Job Posting

Employer and Trainer

Stake Holders

Client

40. Input the appropriate answer.

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

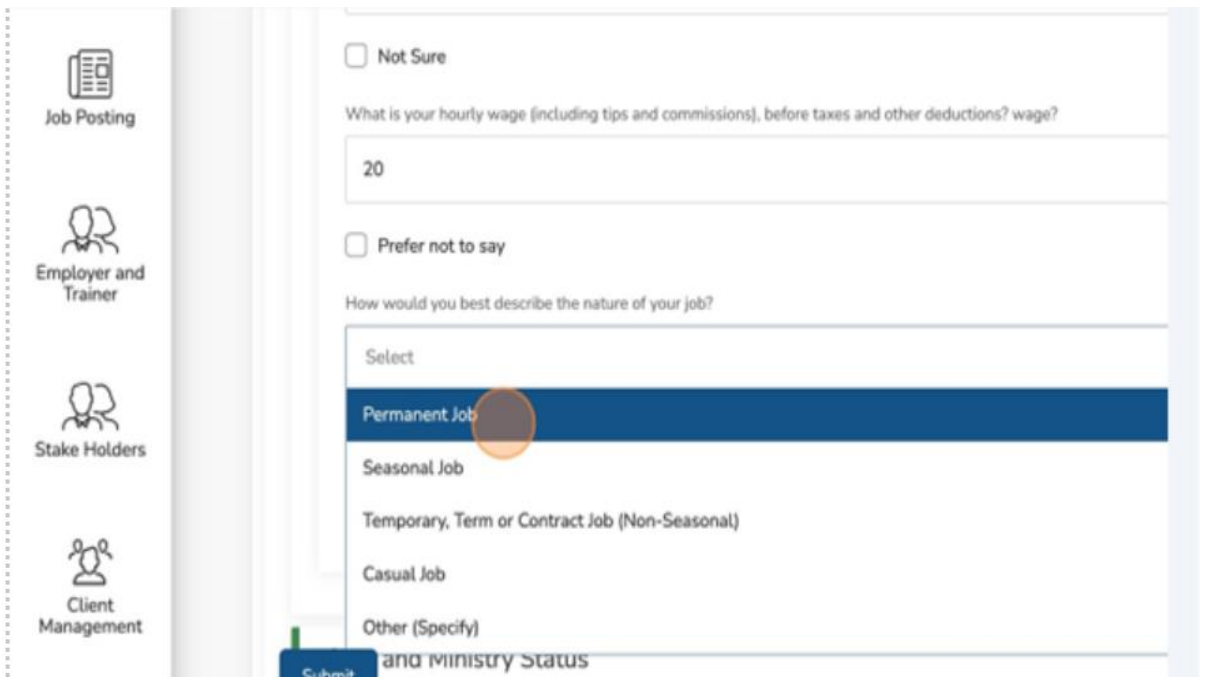
The screenshot shows a survey form with a sidebar on the left containing icons and labels for 'Job Posting', 'Employer and Trainer', 'Stake Holders', and 'Client Management'. The main form area contains several questions. The question 'What is your hourly wage (including tips and commissions), before taxes and other deductions? wage?' is highlighted with an orange circle. The input field for this question contains the number '0'. A blue callout box with the text 'Wage cannot be zero' points to the input field. Other visible questions include 'Are you looking to change your current employment in foreseeable future?' with the answer 'No', and 'Excluding overtime, on average, how many paid hours do you usually work per week?' with the answer '20'. A 'Submit' button is located at the bottom left of the form.

42. Input the appropriate answer.

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

The screenshot shows the same survey form as above, but with the question 'How would you best describe the nature of your job?' highlighted with an orange circle. The input field for this question contains the text 'Select'. The list of options below the input field includes 'Permanent Job', 'Seasonal Job', 'Temporary, Term or Contract Job (Non-Seasonal)', 'Casual Job', and 'Other (Specify)'. The 'Wage cannot be zero' callout box is still present. The 'Submit' button is at the bottom left. The text 'and Ministry Status' is partially visible at the bottom of the form.

44. Select the appropriate answer.

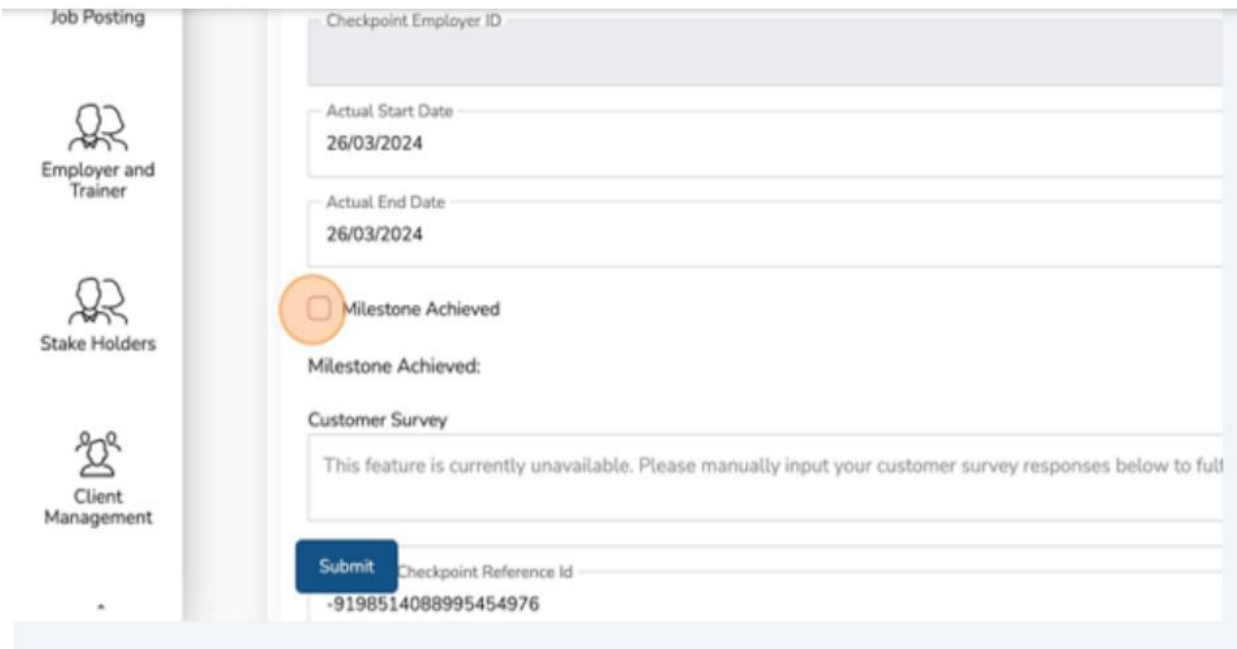


The screenshot shows a questionnaire interface with a sidebar on the left containing four menu items: Job Posting, Employer and Trainer, Stake Holders, and Client Management. The main content area contains the following elements:

- An unchecked checkbox labeled "Not Sure".
- A text input field with the label "What is your hourly wage (including tips and commissions), before taxes and other deductions? wage?" containing the value "20".
- An unchecked checkbox labeled "Prefer not to say".
- A dropdown menu with the label "How would you best describe the nature of your job?". The menu is open, showing options: "Select", "Permanent Job" (highlighted in blue), "Seasonal Job", "Temporary, Term or Contract Job (Non-Seasonal)", "Casual Job", and "Other (Specify)".
- A "Submit" button at the bottom left.
- Partial text "and Ministry Status" is visible at the bottom.

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

45. Check it.



The screenshot shows a questionnaire interface with a sidebar on the left containing four menu items: Job Posting, Employer and Trainer, Stake Holders, and Client Management. The main content area contains the following elements:

- A greyed-out text input field labeled "Checkpoint Employer ID".
- A text input field labeled "Actual Start Date" containing "26/03/2024".
- A text input field labeled "Actual End Date" containing "26/03/2024".
- An unchecked checkbox labeled "Milestone Achieved", which is circled in orange.
- A text label "Milestone Achieved:" below the checkbox.
- A text input field labeled "Customer Survey" containing the text "This feature is currently unavailable. Please manually input your customer survey responses below to fut".
- A "Submit" button at the bottom left.
- A text input field labeled "Checkpoint Reference Id" containing the value "-9198514088995454976".

46. Click "Submit."

The screenshot shows a form for a job posting. On the left is a navigation menu with icons and labels: 'Job Posting', 'Employer and Trainer', 'Stake Holders', and 'Client Management'. The main form area contains the following fields:

- Scheduled Date: 15/08/2024
- Reviewer ID: (empty)
- Reviewer: Select
- Outcome: Select
- Checkpoint Employer Name: N/A
- Checkpoint Employer ID: (empty)
- Actual Start Date: (empty)

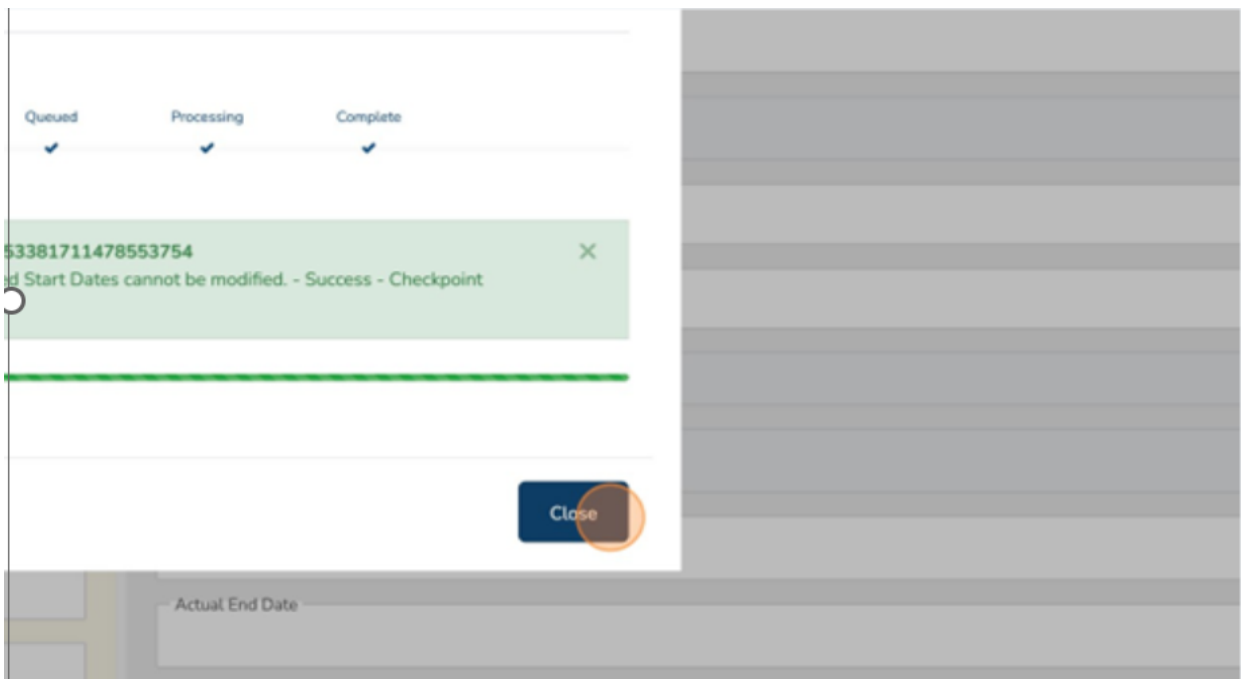
A blue 'Submit' button is located at the bottom left of the form area.

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

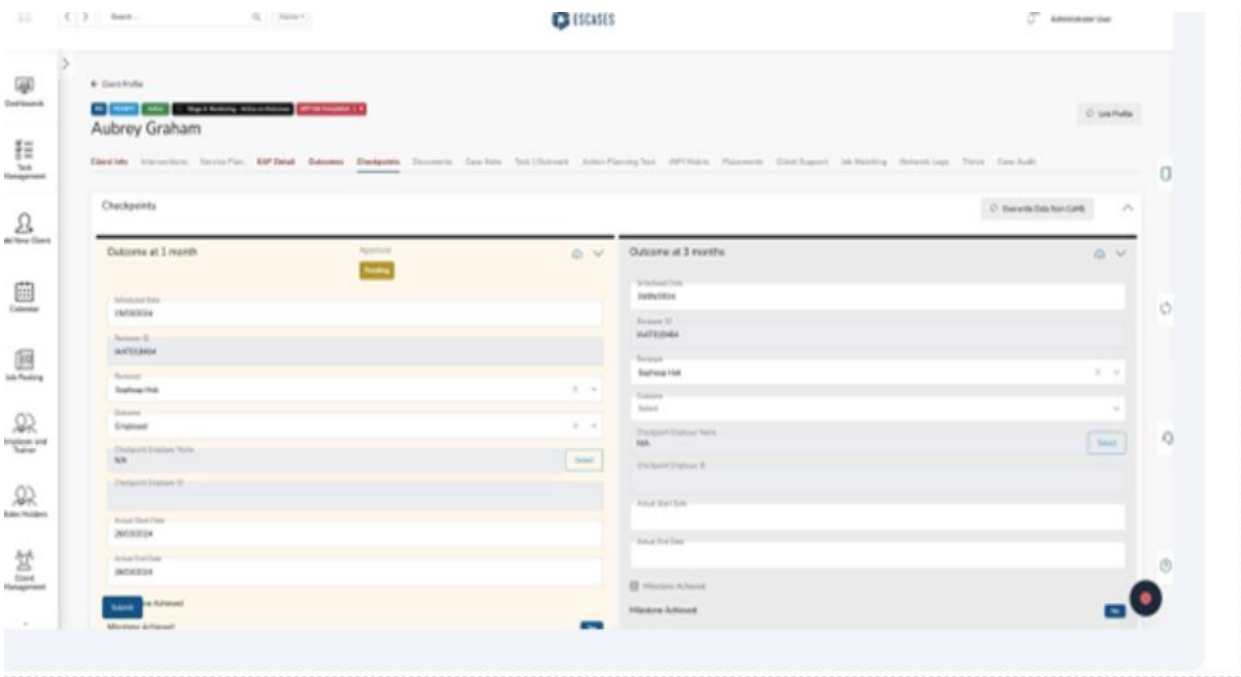
The screenshot shows a client profile page for 'Aubrey Graham'. The page has a navigation menu on the left with icons for 'Dashboard', 'Management', 'Add New Client', 'Calendar', 'Job Posting', 'Employer and Trainer', 'Stake Holders', and 'Client Management'. The main content area shows the 'Checkpoints' section for 'Outcome at 1 month'. A modal window titled 'CaMS Checkpoints Update' is open in the center, displaying a progress bar with four stages: 'None', 'Queue', 'Processing', and 'Complete'. The 'Queue' stage is currently active. Below the progress bar, it says 'You are now first in the queue' and shows a 'Queue' button. The modal also includes a 'Cancel' button and a 'Start' button.

You will be provided with a success notification.

47. Click “Closed.”



You have successfully submitted your checkpoint.



# (17) Client Supports

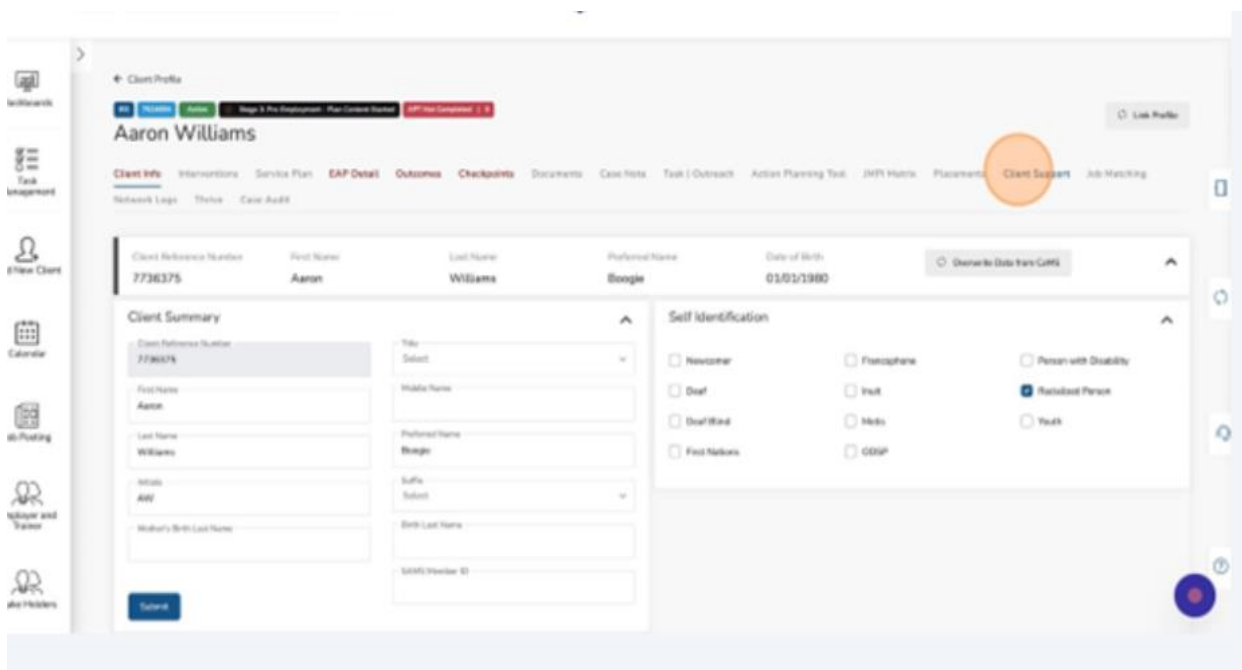
The Client Support workflow requires both submission of a request and approval.

## 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.

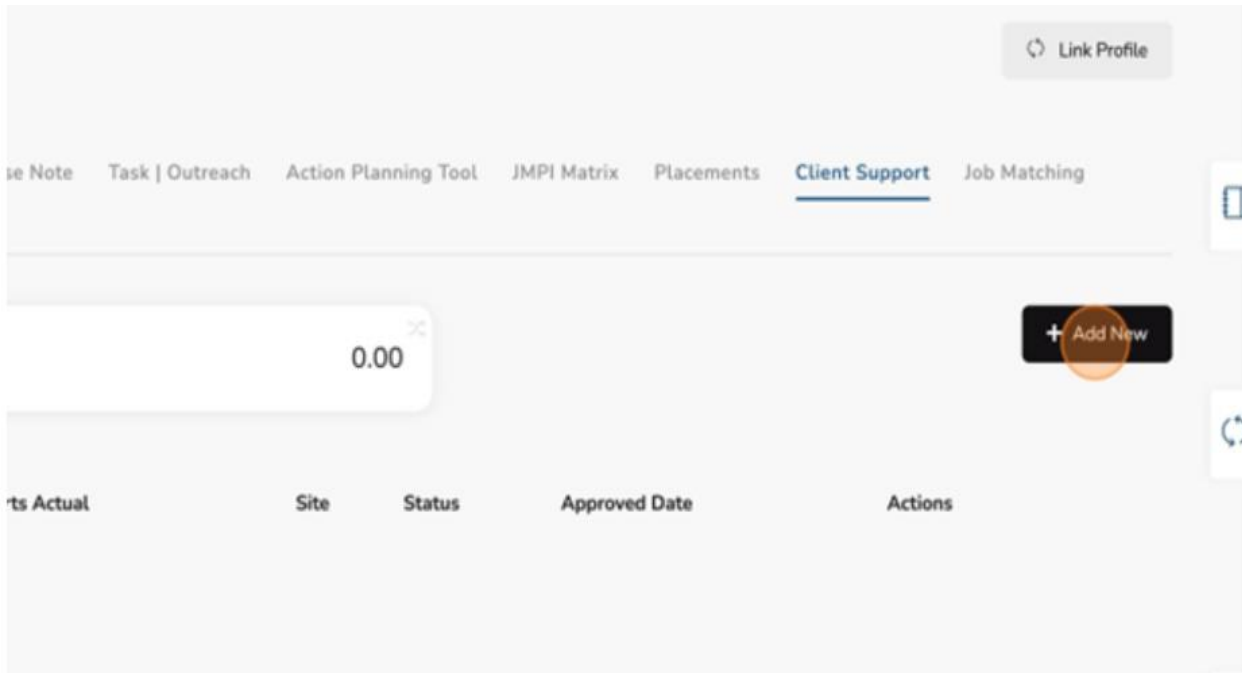
To track a client support amount, complete the following steps:

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

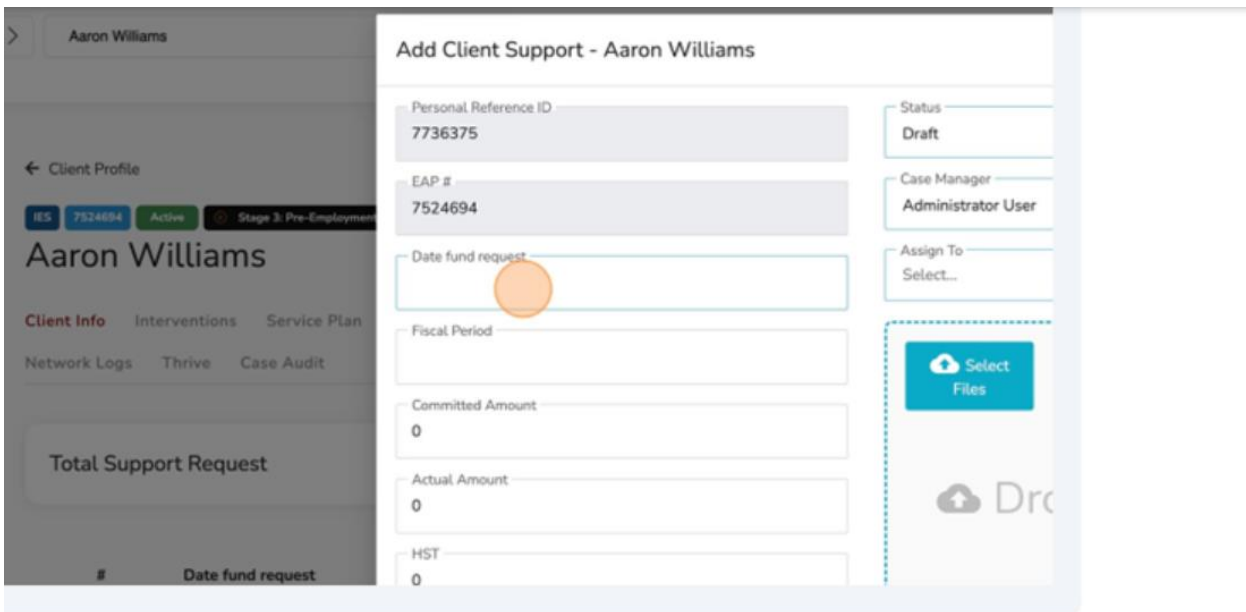




2. Click "Add New."



3. Click "Date Fund Request."



4. Select the appropriate date.

The screenshot shows a calendar for March 2024. The date 21 is highlighted with an orange circle. To the right of the calendar is a file upload area with a blue button labeled 'Select Files' and a dashed box containing the text 'Drop files here'.

5. Click the "Committed Amount" field.

The screenshot shows a client profile form for Aaron Williams. The 'Committed Amount' field is highlighted with an orange circle. The form includes the following fields: EAP # (7524694), Date fund request (21/03/2024), Fiscal Period (2023-2024), Committed Amount (0), Actual Amount (0), HST (0), Support Type (Select...), and Rationale.

6. Insert the appropriate Committed Amount.

7. Click the "Support Type" field.

The screenshot shows a form titled "Total Support Request". On the left, there is a grey sidebar with a "# Date fund request" label. The main form area contains several input fields: "Actual Amount" with the value "0", "HST" with the value "0", "Support Type" with a dropdown menu showing "Select..." (highlighted with an orange circle), "Rationale" (empty text area), "Program/Fund (ES/ODSP)" with a dropdown menu showing "General Support", and "Preferred Vendor" (empty text area). A dashed blue box on the right side of the form indicates a specific area of interest.

8. Select the appropriate "Support Type."

This screenshot shows the "Support Type" dropdown menu expanded. The first option, "Job seeker - Accommodation needs - assistive devices and adaptive technology", is highlighted with a blue background and an orange circle. Other options listed include "Job seeker - Accommodation needs - job-specific communication skills training", "Job seeker - Accommodation needs - on-the-job supports", "Job seeker - Diagnostic assessment", "Job seeker - Certification charges", and "Job seeker - Academic credential or professional accreditation assessment". The "Drc" logo is visible in the top right corner of the form area.

9. Click the “Rationale” field.

The image shows a screenshot of a web application interface for a 'Total Support Request' form. On the left, there is a dark grey sidebar with the title 'Total Support Request' at the top. Below the title, there are two columns: '#', which is currently empty, and 'Date fund request', which also appears to be empty. At the bottom of the sidebar, the text 'ESCASES 2020' is visible. The main content area on the right contains several input fields: 'Actual Amount' with the value '0', 'HST' with the value '0', 'Support Type' with a dropdown menu showing 'Job seeker - Accommodation needs - assistive de..' and an 'X' icon, 'Rationale' (highlighted with an orange circle), 'Program/Fund (ES/ODSP)' with a dropdown menu showing 'General Support' and an 'X' icon, and 'Preferred Vendor' which is currently empty. To the right of the form fields, there is a light blue vertical bar containing an upload icon (a cloud with an upward arrow) and a letter 'D'. A dashed blue line indicates a selection or focus area around the 'Rationale' field and the upload icon.

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.

The screenshot shows a web form titled "Total Support Request". On the left is a sidebar with a table containing a header "# Date fund request". The main form area includes several fields: "Support Type" with a dropdown menu showing "Job seeker - Accommodation needs - assistive de.."; "Rationale" with the text "This device is required for ABCD." and a green icon; "Program/Fund (ES/ODSP)" with a dropdown menu showing "General Support" and an orange circle highlighting this field; "Preferred Vendor" (empty); and "Item Description" (empty). At the bottom, there are radio buttons for "Internal Transfer" and "Clients responsible for obtaining receipt(s)".

13. Select the appropriate Fund.

This screenshot shows the "Program/Fund (ES/ODSP)" dropdown menu expanded. The menu lists "General Support" (highlighted in blue with an orange circle) and "ODSP". The rest of the form, including the sidebar and other fields, is visible in the background.

14. Click the “Preferred Vendor” field.

The screenshot shows a form with a dark grey sidebar on the left containing a '#' symbol and the text 'Date fund request'. The main form area has several fields: 'Program/Fund (ES/ODSP)' with the value 'General Support' and a dropdown arrow; 'Preferred Vendor' which is highlighted with an orange circle; and 'Item Description' which is empty. At the bottom, there are three radio button options: 'Internal Transfer', 'Clients responsible for obtaining receipt(s)', and 'Company will invoice' with a dropdown menu showing 'St. Lawrence College - Sharbot Lake'. The sidebar also contains the text 'ESCASES 2020' at the bottom.

15. Insert the “Preferred Vendor” as required.

16. Click the “Item Description” field.

The screenshot shows the same form as above, but with additional text. The 'Rationale' field contains the text 'This device is required for ABCD.' The 'Preferred Vendor' field now contains the text 'The preferred vendor is Selling Corp.' and has a small icon in the bottom right corner. The 'Item Description' field is still empty and highlighted with an orange circle. The sidebar and bottom options remain the same.

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

17. Insert the appropriate "Item Description."

18. Click the "Status" field.

Client Support - Aaron Williams

Reference ID

Status: Draft

Case Manager: Administrator User

Assign To: Select...

Select Files

Drop files here

19. Select "Submit."

Client Support - Aaron Williams

Personal Reference ID: 36375

P #: 24694

Date fund request: 10/03/2024

Fiscal Period: 2023-2024

Submitted Amount: 0

Actual Amount

Status: Draft

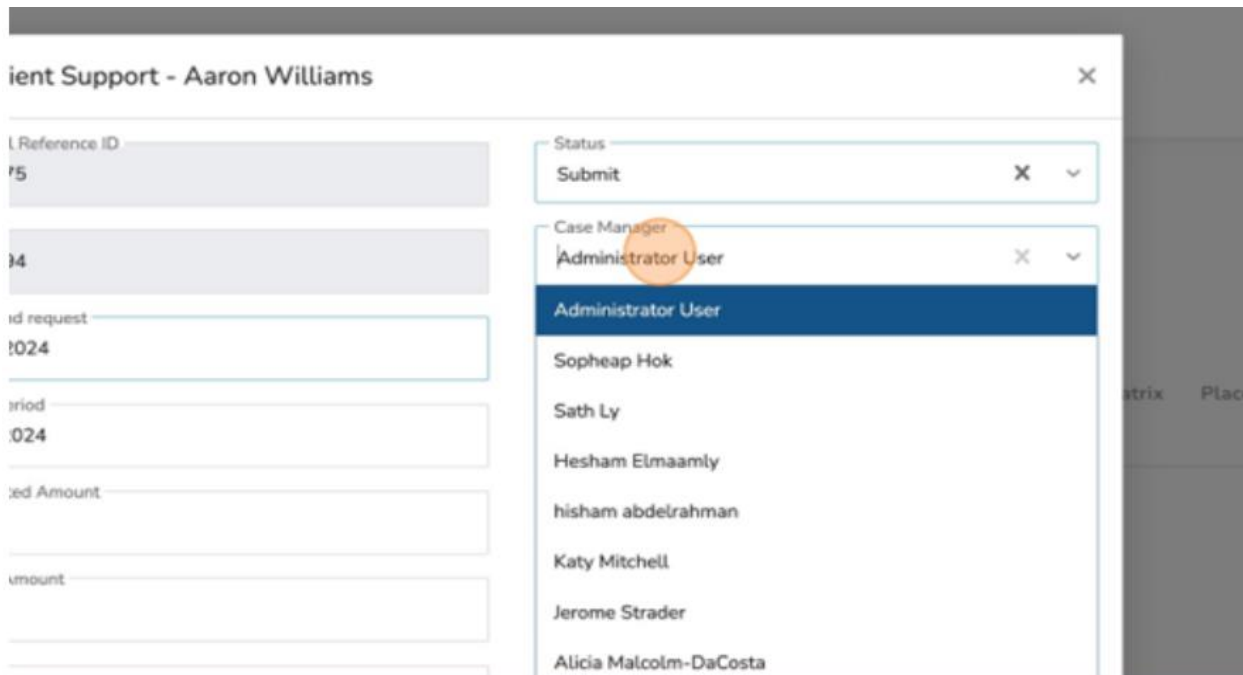
Submit

Assign To: Select...

Select Files

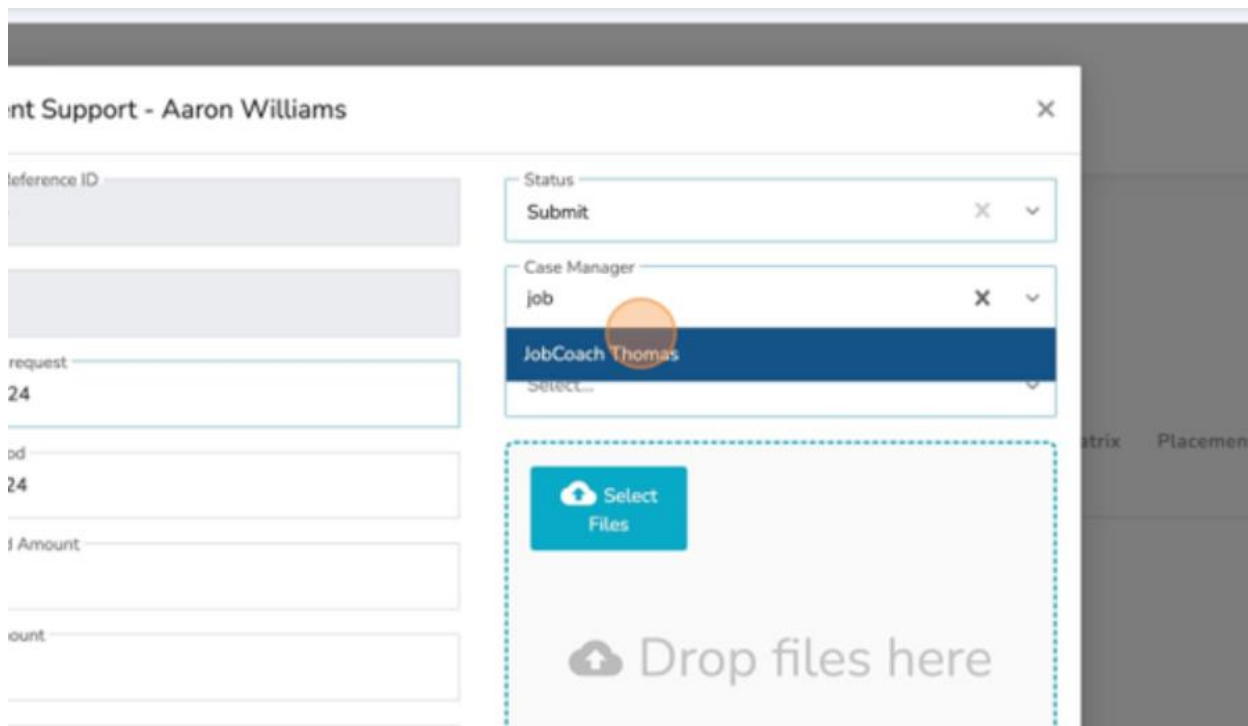
Drop files here

20. Click the “Case Manager” field.



The screenshot shows a form titled "Client Support - Aaron Williams". On the left, there are several input fields: "Reference ID" (value: 75), "Case ID" (value: 14), "Request ID" (value: 1024), "Period" (value: 024), "Budgeted Amount", and "Amount". On the right, there are two dropdown menus. The first is labeled "Status" and has "Submit" selected. The second is labeled "Case Manager" and has a list of names open: "Administrator User" (highlighted in blue), "Sopheap Hok", "Sath Ly", "Hesham Elmaamly", "hisham abdelrahman", "Katy Mitchell", "Jerome Strader", and "Alicia Malcolm-DaCosta". An orange circle highlights the "Case Manager" dropdown header.

21. Select the appropriate “Case Manager.”



The screenshot shows the same form as above, but now "JobCoach Thomas" is selected in the "Case Manager" dropdown menu. An orange circle highlights the selected name. Below the dropdown menu, there is a "Select Files" button and a "Drop files here" area with an upload icon.



22. Click the "Assign to" field.

Client Support - Aaron Williams

Final Reference ID: 5375

Case Manager: JobCoach Thomas

Assign To: Select...

Select Files

Drop files here

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

Client Support - Aaron Williams

Reference ID: 5

Case Manager: JobCoach Thomas

Assign To: man

Manager Thomas

hisham abdelrahman

- ✓ 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."

The screenshot shows a form with several input fields. The first field contains a search icon and a dropdown arrow. The second field contains a lightbulb icon and a green checkmark icon. The third field contains the text "00.". The fourth field contains the text "Receipt(s)" and a dropdown menu showing "ada - Downsview - SSM". At the bottom right, there are two buttons: "Submit" (highlighted with an orange circle) and "Cancel". To the right of the form is a dark grey sidebar with the text "Approved Date" and "Actions".

Client Support has been successfully submitted.

The screenshot shows a client profile page for "Aaron Williams". The page has a sidebar with navigation icons for Dashboard, Case Management, Add New Client, Calendar, Job Posting, Employer and Trainer, and Stakeholders. The main content area shows a "Client Profile" for "Aaron Williams" with tabs for Client Info, Interventions, Service Plan, GAP Detail, Outcomes, Checkpoints, Documents, Case Note, Task/Outreach, Action Planning Tool, JWPH Metric, Placement, Client Support, and Job Matching. Below the tabs are two summary cards: "Total Support Request" with a value of \$200.00 and "Total Support Actual" with a value of 0.00. Below these cards is a table with the following data:

#	Date first request	Supports Request	Supports Actual	Site	Status	Approved Date	Actions
1	21-Mar-2024	\$200.00	\$0.00	5338A	Submitted		Actions*

At the bottom of the page, it says "Showing 1 of 1 entries" and "Items 10". The footer contains "ESCADES 2020" and "Build 2024".

- ✓ 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**

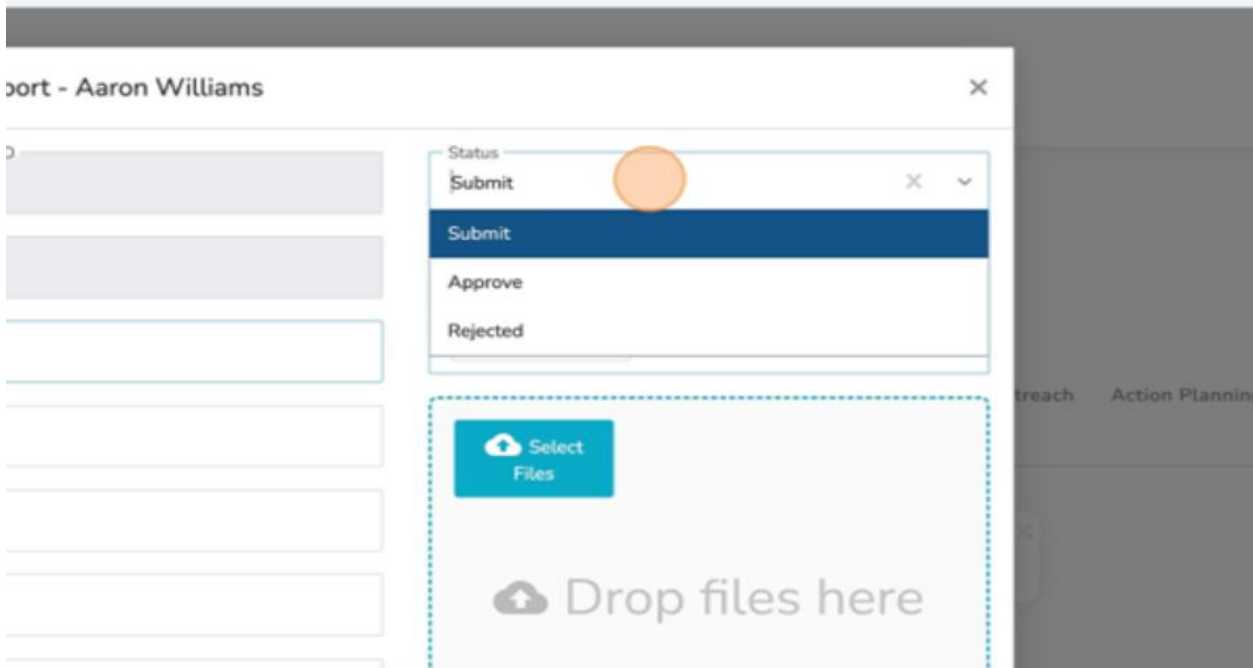
Client Support has been submitted

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

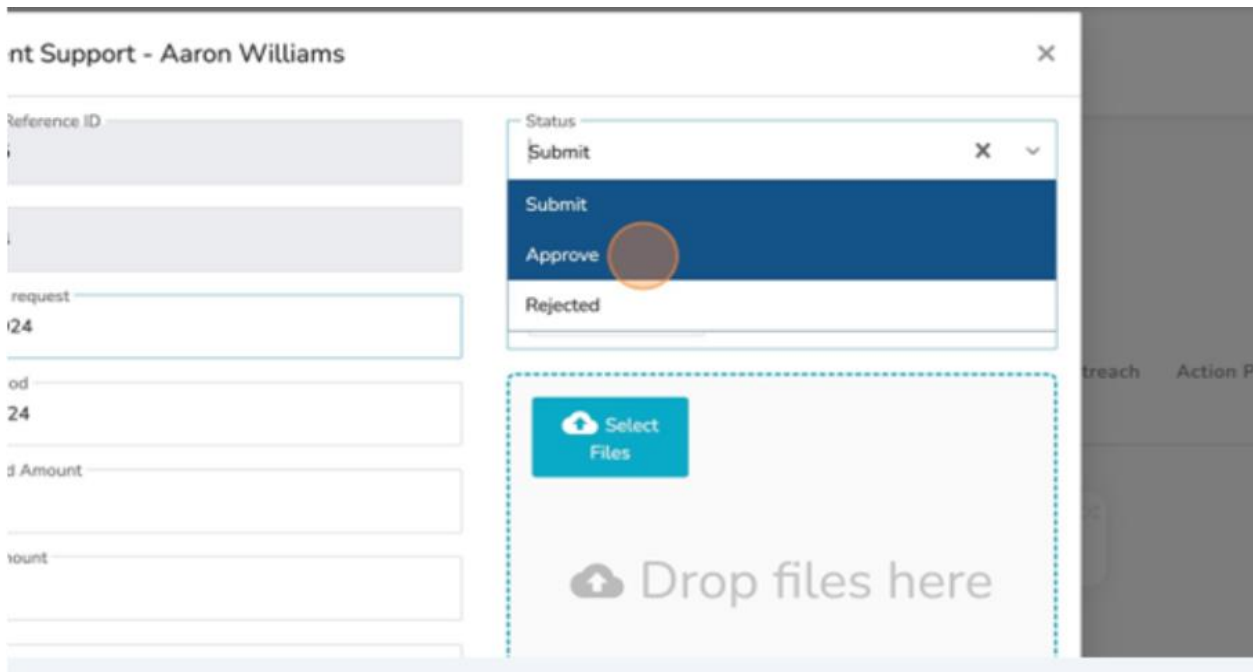
Review Request

[https://serco-sandbox.escases.ca/ep/client/1110/  
serviceplan/1080/program/es?sub=5&clientSupportId=116](https://serco-sandbox.escases.ca/ep/client/1110/serviceplan/1080/program/es?sub=5&clientSupportId=116)

2. Select the "Status" field.



3. Click "Approve."



4. Click the "Approve Date" field.

The screenshot shows a form with several input fields on the left and a dropdown menu on the right. The dropdown menu is open, showing a calendar for March 2024. An orange circle highlights the 'Approved Date' field, and a blue dashed box highlights the calendar.

Personal Reference ID	Status
736375	Approve

AP #	Case Manager
524694	JobCoach Thomas

Date fund request	Assign To
01/03/2024	Manager Thomas

Fiscal Period	Approved Date
2023-2024	

Committed Amount
0.00

Actual Amount
0

POST

Support Type

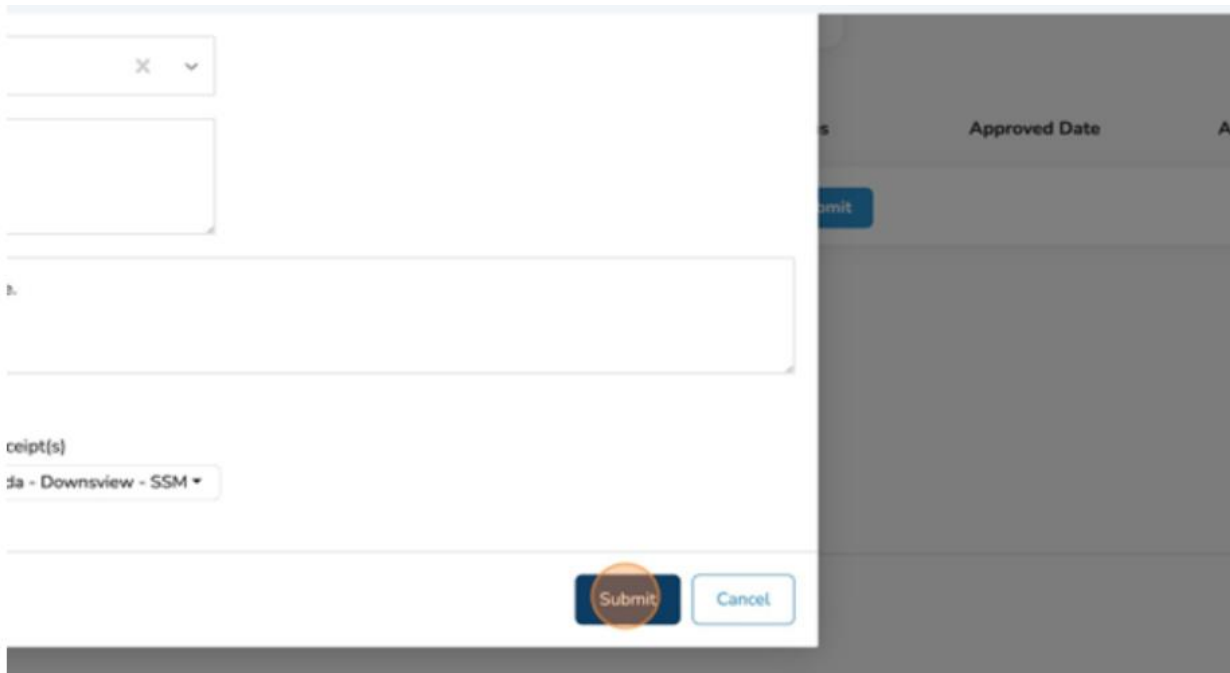
March 2024						
Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23

5. Select the appropriate date.

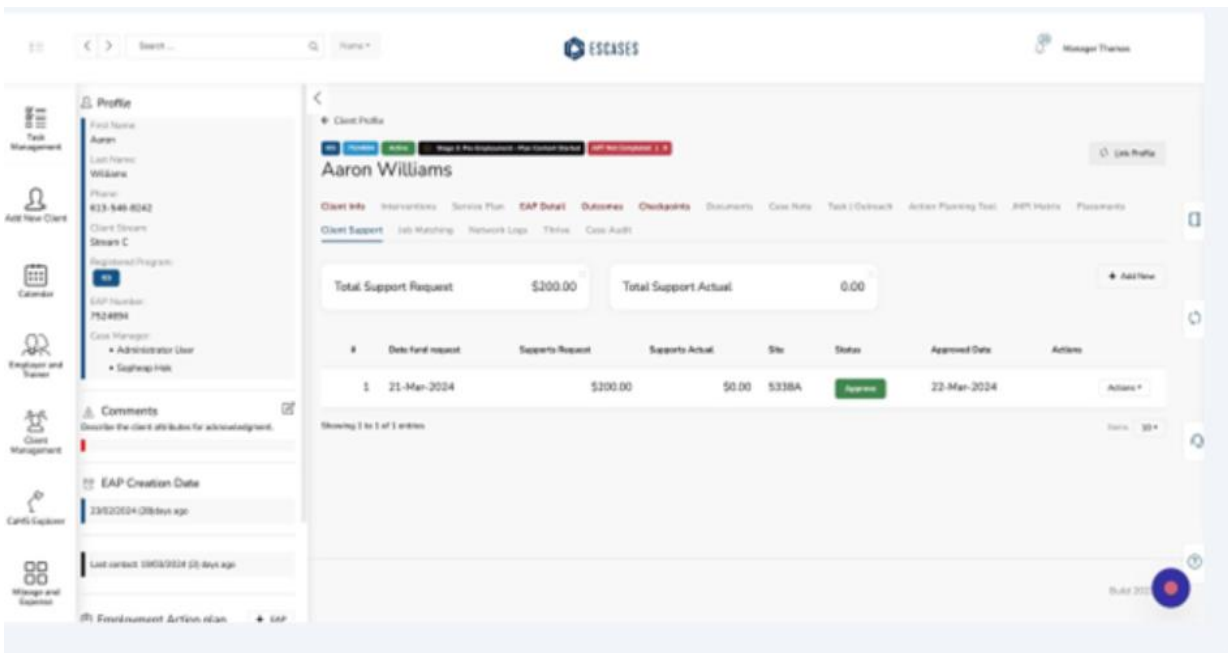
The screenshot shows the same form as above, but with the calendar open and the date 22 selected. A blue dashed box highlights the calendar, and an orange circle highlights the date 22. The 'Approved Date' field is now populated with the date 22.

Approved Date
22

6. Click "Submit."



The "Client Support" has been approved.

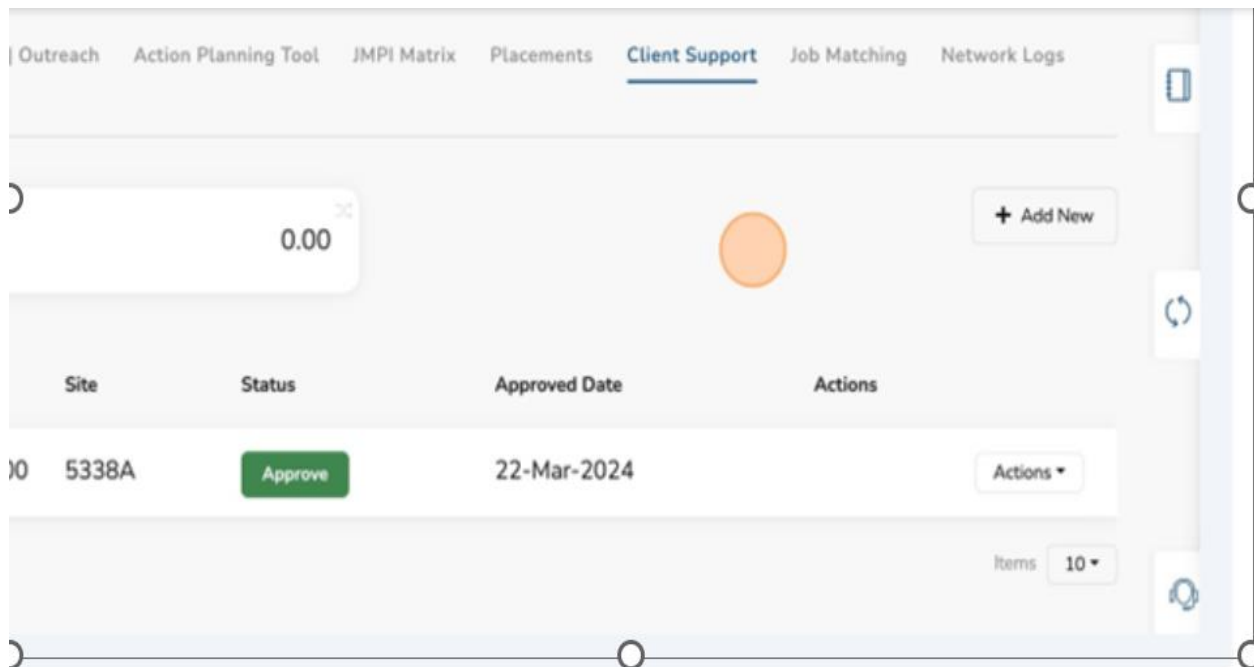


- ✓ The submitted and the approver will receive a notification through email when the status of the “Client Support” has changed.

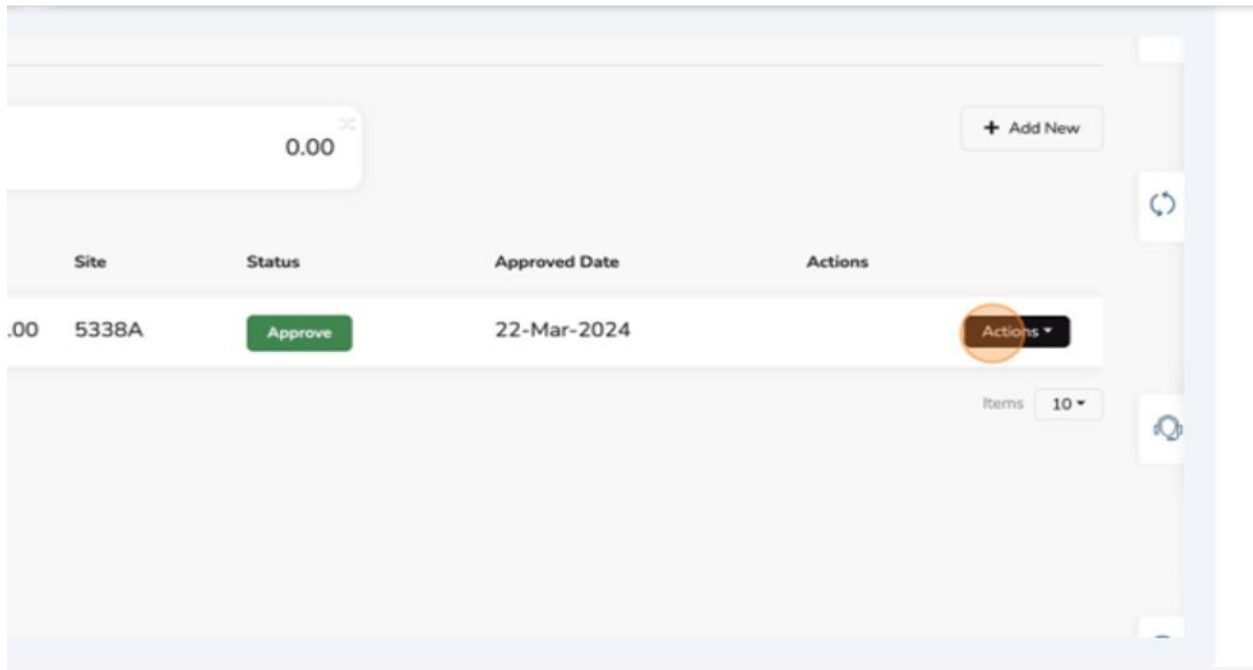


## Completing an Approved Client Support

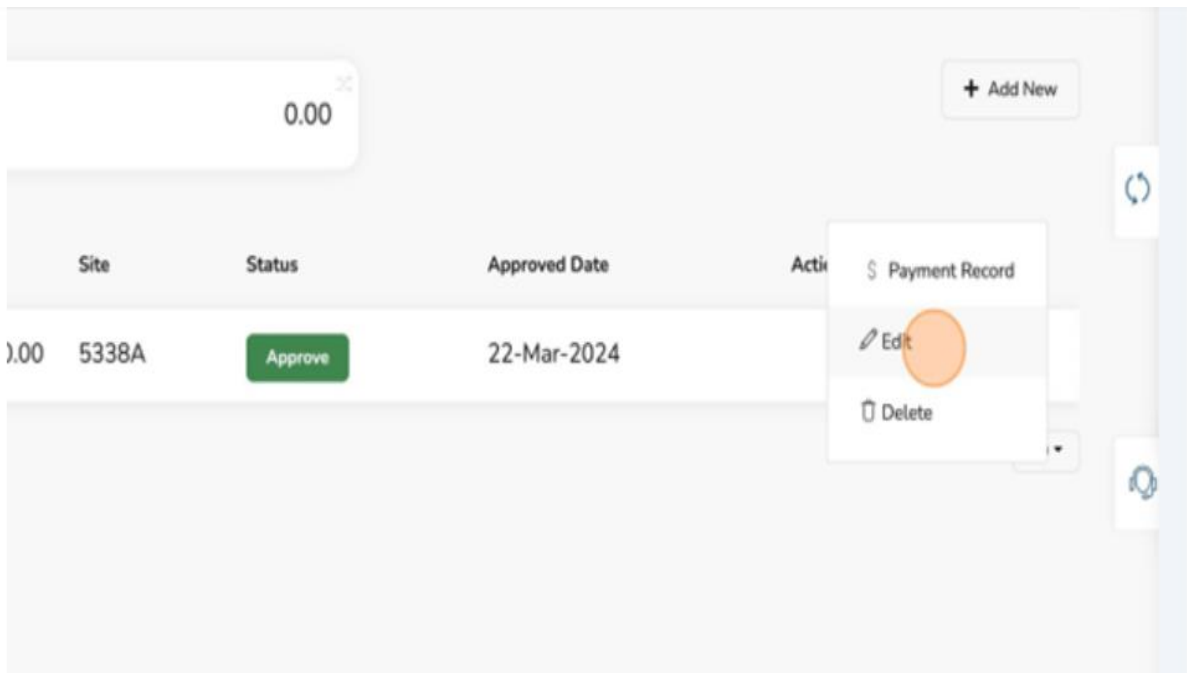
1. Select the client support.



2. Click "Actions."



3. Click "Edit."





4. Click “Actual Amount” field.

The screenshot shows a web interface for a support request. On the left, a sidebar displays the name 'aron Williams' and a table with one entry: '# 1', 'Date fund request 21-Mar-2024'. The main form area contains several fields: 'Date fund request' (21/03/2024), 'Fiscal Period' (2023-2024), 'Committed Amount' (200), 'Actual Amount' (0), 'HST' (0), 'Support Type' (Job seeker - Accommodation needs - assistive de...), and 'Rationale' (This device is required for ABCD.). On the right, there are fields for 'Assign To' (Manager Thomas) and 'Approved Date' (22/03/2024), along with a 'Select Files' button and a 'Drop files' area.

5. Input the appropriate “Actual Amount.”

6. Click the “HST” field.

This screenshot shows the same web form as above, but with the 'Actual Amount' field updated to 150. The 'HST' field is now highlighted with an orange circle. The 'Support Type' and 'Rationale' fields remain the same. The 'Assign To' and 'Approved Date' fields are also visible on the right side.

7. Input the appropriate "HST" amount.

8. Click the "Status" field.

Support - Aaron Williams

Reference ID

Request

Amount

Status

- Approve
- Completed
- Closed

Approved Date

22/03/2024

Select Files

9. Click "Complete."

Support - Aaron Williams

Reference ID

5

4

Request

024

Period

024

Amount

Status

- Approve
- Completed
- Closed

Approved Date

22/03/2024

Select Files

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

The screenshot shows a web form with several input fields and a file upload area. On the left side, there are fields for 'Final Reference ID' (value: 1375), 'Fund request' (value: 3/2024), 'Period' (value: 1-2024), 'Budgeted Amount', and 'Actual Amount'. On the right side, there are dropdown menus for 'Status' (value: Completed), 'Case Manager' (value: JobCoach Thomas), and 'Assign To' (value: Manager Thomas). Below these is a large dashed box containing a 'Select Files' button and the text 'Drop files here'. To the right of the form is a vertical sidebar with a 'Placements' section and an 'Approved Date' field.

11. Click “Submit.”

The screenshot shows a web form with a file upload confirmation. At the top, there is a file name 'Final Call for Orders.JPG' with a 'Remove' button. Below this is a large text area containing the text 'receipt(s)' and 'ada - Downsview - SSM'. At the bottom of the form, there are two buttons: 'Submit' and 'Cancel'. To the right of the form is a vertical sidebar with a 'Draft' button, an 'Approve' button, and a date '22-Mar-2024'.

You have successfully completed a client support submission.

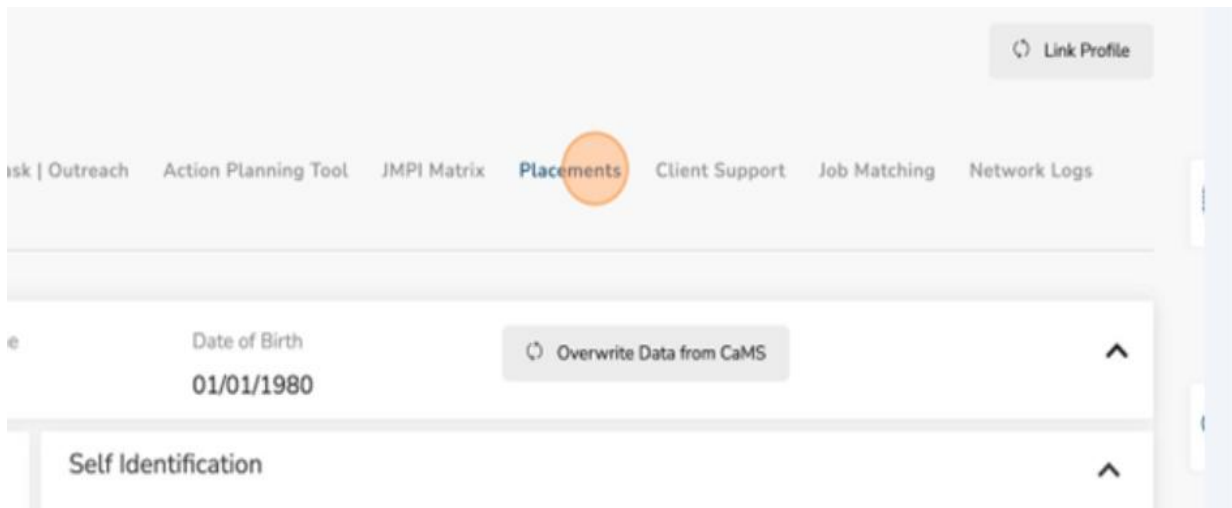
The screenshot shows a web application interface for client support. On the left is a navigation sidebar with icons for Case Management, Add New Client, Calendar, and Employment and Support. The main content area is titled 'Client Profile' for 'Aaron Williams'. It includes a 'Client Info' section with tabs for Interventions, Service Plan, EAP Detail, Subunits, Checkpoints, Documents, Case Notes, Tools / Dashboard, Action Planning Tool, JMT/Intake, Payments, Client Support, Job Monitoring, and Research Logs. Below this, there are two summary boxes: 'Total Support Request' for \$200.00 and 'Total Support Actual' for 200.00. A table below shows a single entry for a support request on 23-Mar-2024 for \$200.00, with a status of 'Complete' and an approval date of 22-Mar-2024. The interface also features a 'Comments' section, 'EAP Creation Date', and an 'Employment Action plan' section.

#	Date of request	Supports Request	Supports Actual	Site	Status	Approval Date	Action
1	23-Mar-2024	\$200.00	\$200.00	5338A	Complete	22-Mar-2024	Action

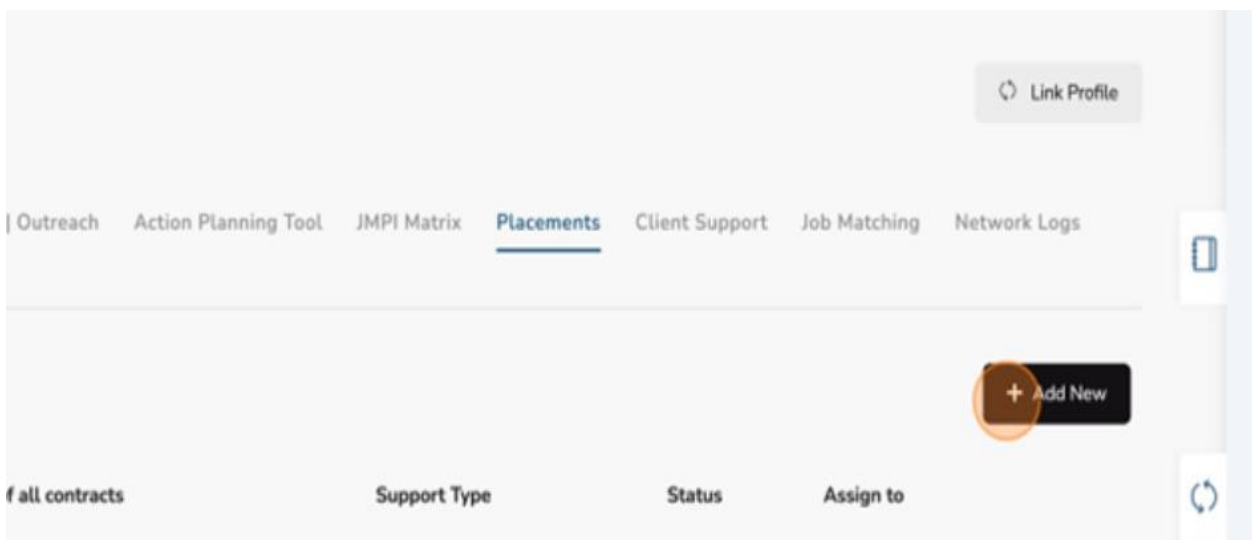
## (18) Placements

✓ 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."

**Add Placement - Immanuel Quickley**

Employer  [View](#)

Support Type

Contract Date

Hourly Wage

Hourly Incentive

Weeks

Hours

File ID

Apprenticeship

Agreement Type

Program/Fund (ES/OOSP)

Status

Note

5. Select the Employer for the placement.

**Bare Min.**  
⚠ Missing employer reference number

**ESCASES Inc.**  
ESCASES Inc.  
⚠ Missing employer reference number

**Fake Store that Sells Stuff**  
⚠ Missing employer reference number

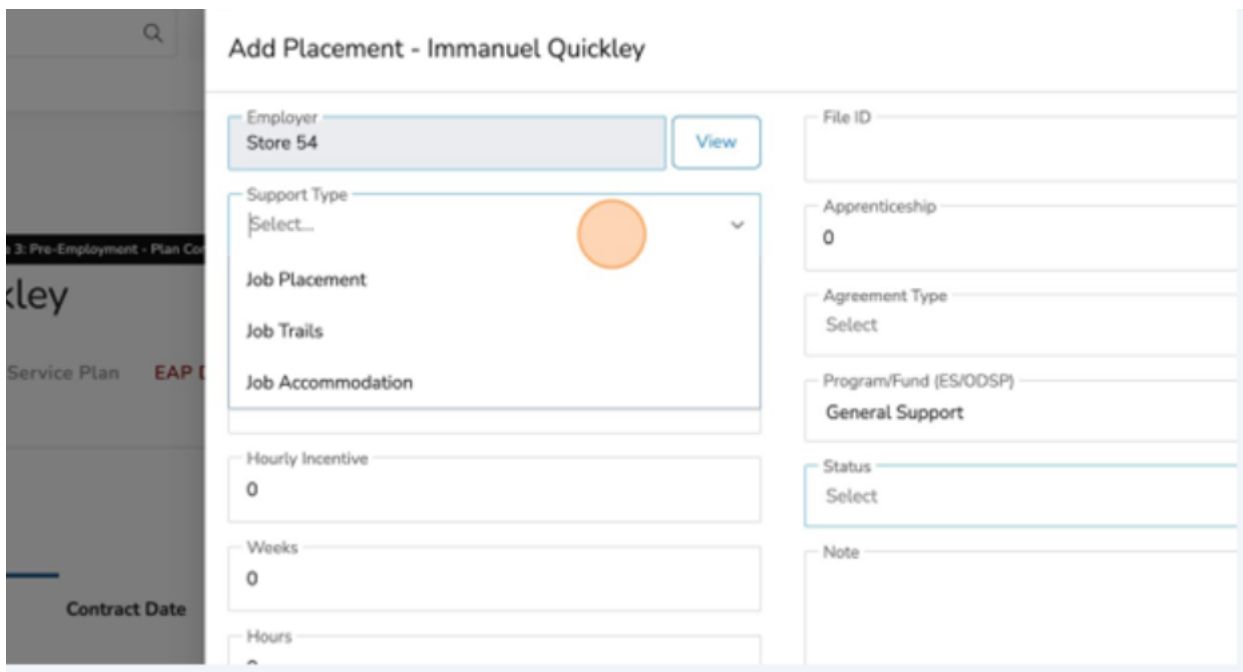
**Fill company**  
Fill company  
⚠ Missing employer reference number

**Natalie Vuong Pharmacy Ltd.**  
Shoppers Drugmart Maplevue  
📍 123456

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



7. Click the “Support Type” field.



8. Select the appropriate “Support Type.”

**Add Placement - Immanuel Quickley**

Employer: Store 54

Support Type: Select...  
Job Placement  
Job Trails  
Job Accommodation

File ID:

Apprenticeship: 0

Agreement Type: Select

Program/Fund (ES/ODSP): General Support

Status: Select

Note:

Hourly Incentive: 0

Weeks: 0

Hours:

Contract Date:

9. Click the “Contract Date” field.

**Add Placement - Immanuel Quickley**

Employer: Store 54

Support Type: Job Placement X

Contract Date:

File ID:

Apprenticeship: 0

Agreement Type: Select

Program/Fund (ES/ODSP): General Support

Status: Select

Note:

Hourly Wage: 0

Hourly Incentive: 0

Weeks: 0

Hours:

Contract Date:



10. Select the appropriate "Contract Date."

The screenshot shows a web interface for a client profile. A calendar for March 2024 is displayed, with the date 21st highlighted in blue. The form includes the following fields:

- Agreement Type: Select
- Program/Fund (ES/ODSP): General Support
- Status: Select
- Note: (empty text area)
- Actual Amount: \$0
- Assign to: Select (dropdown menu)

11. Click the "Hourly Wage" field.

The screenshot shows a web interface for a client profile. The 'Hourly Wage' field is highlighted with an orange circle. The form includes the following fields:

- Employer: Store 54 (with a View button)
- Support Type: Job Placement (with a close and dropdown button)
- Contract Date: 21/03/2024
- Hourly Wage: 0 (with a dropdown arrow)
- Hourly Incentive: 0
- Weeks: 0
- Hours: 0
- Committed Amount: \$0
- File ID: (empty text area)
- Apprenticeship: 0
- Agreement Type: Select
- Program/Fund (ES/ODSP): General Support
- Status: Select
- Note: (empty text area)

12. Input the appropriate "Hourly Wage."

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

Client Profile

IES 7526413 Active Stage 3: Pre-Employment - Plan Co

# Immanuel Quickley

Client Info Interventions Service Plan EAP

Thrive Case Audit

---

Company Contract Date

Support Type: Job Placement

Contract Date: 21/03/2024

Hourly Wage: 20

Hourly Incentive: 0

Weeks: 0

Hours: 0

Committed Amount: \$0

Actual Amount: \$0

Apprentic: 0

Agreeme: Select

Program/F: General

Status: Select

Note:

Fi

14. Click the “Weeks” field.

Immanuel Quickley

Client Info Interventions Service Plan EAP

Thrive Case Audit

---

Company Contract Date

Contract Date: 21/03/2024

Hourly Wage: 20

Hourly Incentive: 4

Weeks: 0

Hours: 0

Committed Amount: \$0

Actual Amount: \$0

Assign to:

Agreemen: Select

Program/F: General

Status: Select

Note:

Fi

15. Input the appropriate “Weeks” value.

16. Click the "Hours" field.

The screenshot shows a software interface with a dark sidebar on the left containing navigation tabs: "Client Info", "Interventions", "Service Plan", and "EAP". Below these are "Thrive" and "Case Audit". The main area contains a form with the following fields: "Hourly Wage" (20), "Hourly Incentive" (4), "Weeks" (8), "Hours" (0), "Committed Amount" (\$0), "Actual Amount" (\$0), "Assign to" (Select), and "Site ID" (Select). An orange circle highlights the "Hours" field.

17. Input the appropriate "Hours" amount.

18. Click the "Assign to" field.

The screenshot shows the same software interface as before, but with updated values: "Hours" is now 320 and "Committed Amount" is \$1,280. The "Assign to" field is highlighted with an orange circle. To the right of the form is a file upload area with a "Select Files" button and a "Drop files here" area.

19. Select the appropriate staff from the drop down.

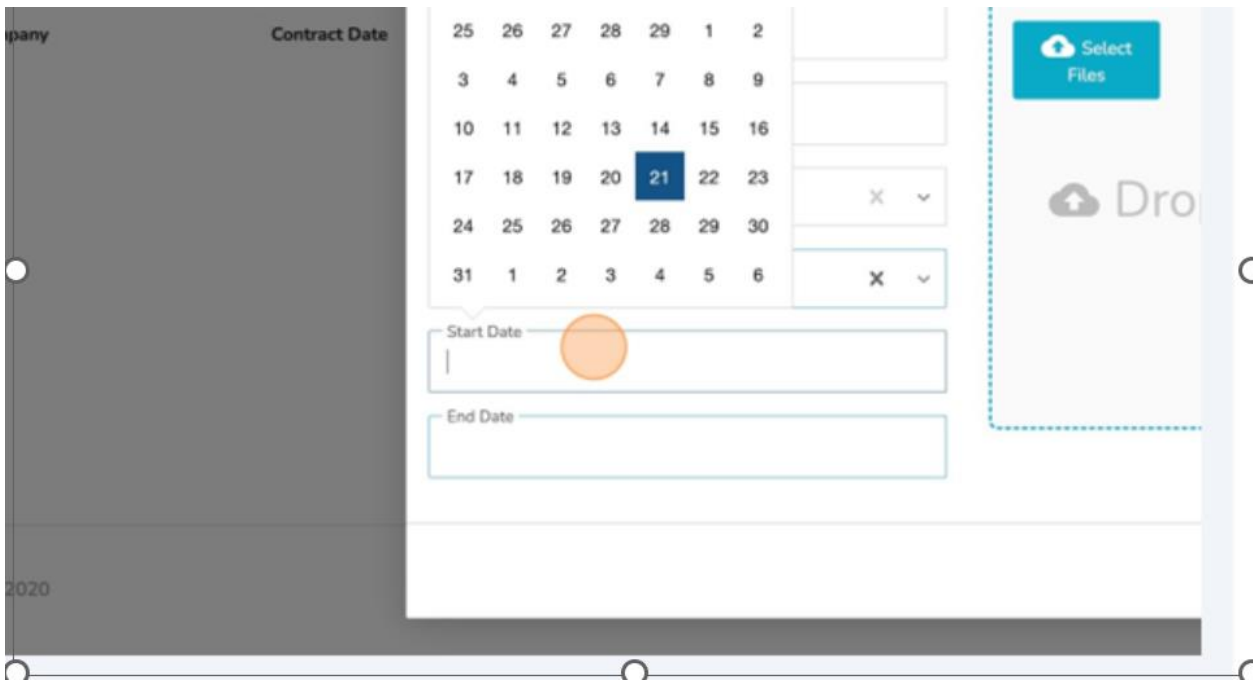
20. Select the "Site ID" field.

A screenshot of a web form with a dark grey sidebar on the left containing the text "Company" and "Contract Date". The main form area contains several input fields: a text field with "320", a "Committed Amount" field with "\$1,280", an "Actual Amount" field with "\$0", an "Assign to" dropdown menu showing "Manager Thomas", a "Site ID" dropdown menu with "Select" and "5338A" (highlighted with an orange circle), and an "End Date" field. To the right of the form is a file upload area with a "Select Files" button and a "Drop" label.

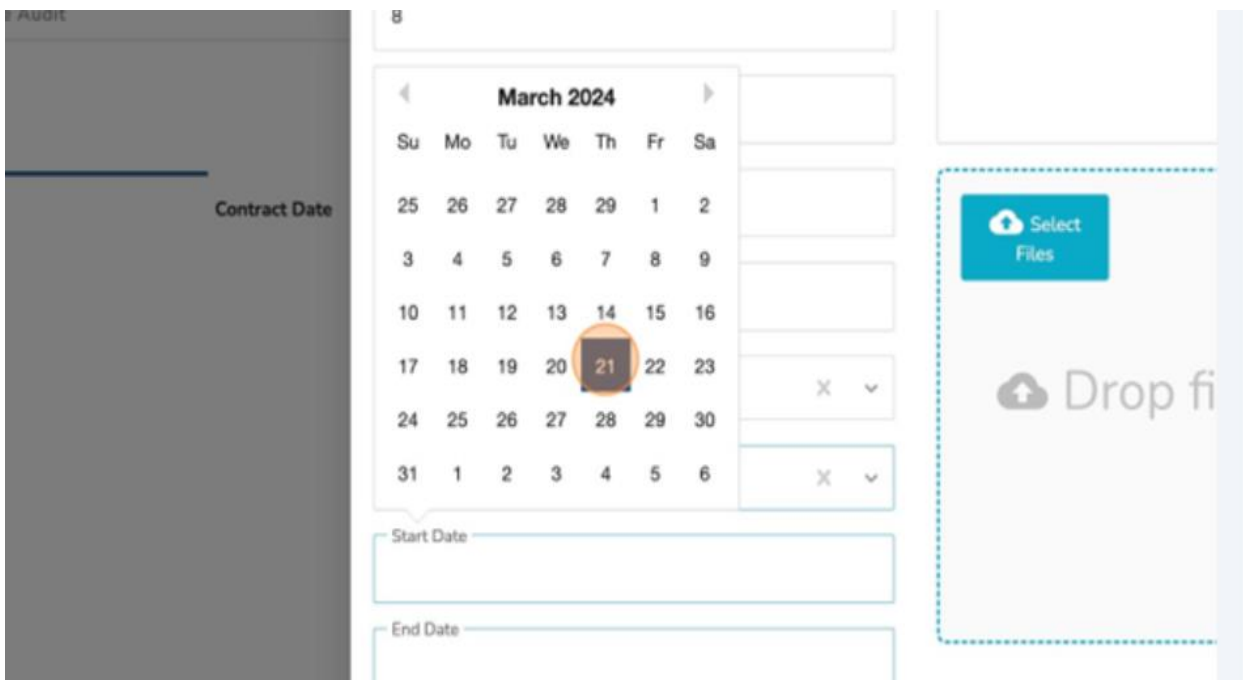
21. Select the appropriate "Site ID."

A screenshot of the same web form as above, but with the "Site ID" dropdown menu open. The option "5338A" is highlighted in a dark blue bar, and an orange circle is positioned over it. The "Select" option is visible above it. The rest of the form and the file upload area remain the same.

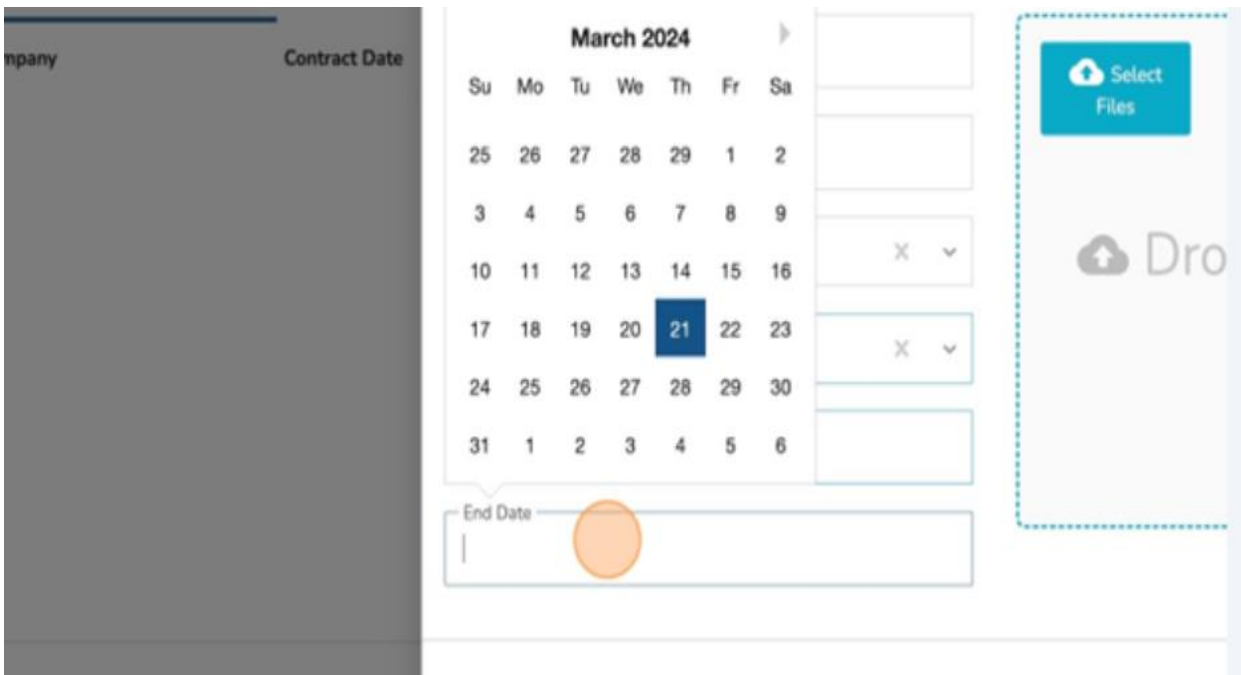
22. Select the "Start Date" field.



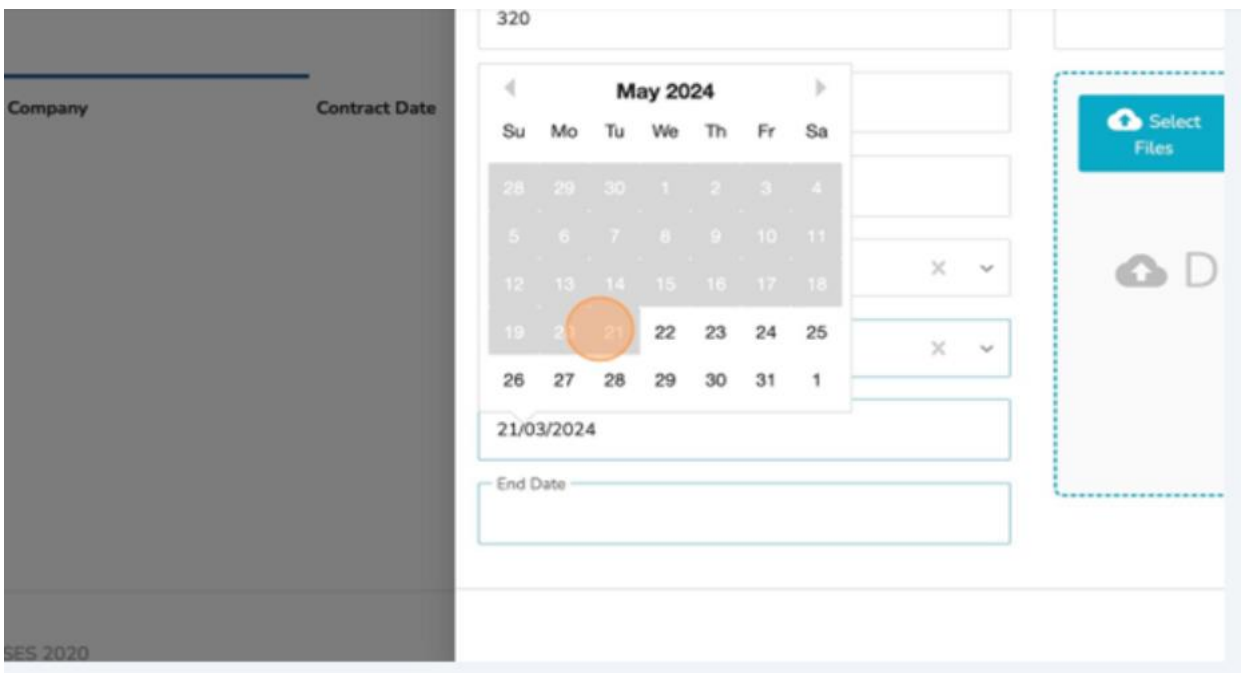
23. Select the appropriate "Start Date."



24. Click the “End Date” field.



25. Select the appropriate “End Date.”



26. Click "Agreement Type."

Placement - Immanuel Quickley

Employer: [Employer ID: 54] View

Placement Type: Placement

Start Date: 03/2024

Hourly Wage: \_\_\_\_\_

Hourly Incentive: \_\_\_\_\_

File ID: \_\_\_\_\_

Apprenticeship: 0

Agreement Type: Select

Program/Fund (ES/ODSP): General Support

Status: Select

Note: \_\_\_\_\_

27. Select the appropriate "Agreement Type."

Placement - Immanuel Quickley

Employer: [Employer ID: 54] View

Placement Type: Placement

Start Date: 3/2024

Hourly Wage: \_\_\_\_\_

Hourly Incentive: \_\_\_\_\_

File ID: \_\_\_\_\_

Apprenticeship: 0

Agreement Type: Select

Placement with Incentive

Test and Hire

Status: Select

Note: \_\_\_\_\_

28. Click the "Status" field.

The screenshot shows a web form with several input fields. On the right side, a dropdown menu for 'Status' is open, displaying options: 'Select', 'Job Searching', 'Placed', 'Employed', and 'Quit'. An orange circle highlights the 'Status' label and the 'Select' option. Other visible fields include 'Report Type' (Placement), 'Contract Date' (10/03/2024), 'Hourly Wage' (0), 'Hourly Incentive', 'Weeks', 'Hours' (20), 'Committed Amount' (1,280), 'Actual Amount' (0), and 'Assign to' (Manager Thomas). The 'Agreement Type' is 'Placement with Incentive' and 'Program/Fund (ES/ODSP)' is 'General Support'.

29. Select the appropriate "Status."

The screenshot shows the same web form as above, but the 'Placed' option in the 'Status' dropdown menu is now selected and highlighted with a blue bar. An orange circle highlights the 'Placed' option. The 'Status' field now displays 'Placed'. The other fields remain the same as in the previous screenshot.



30. Click the "Note" field.

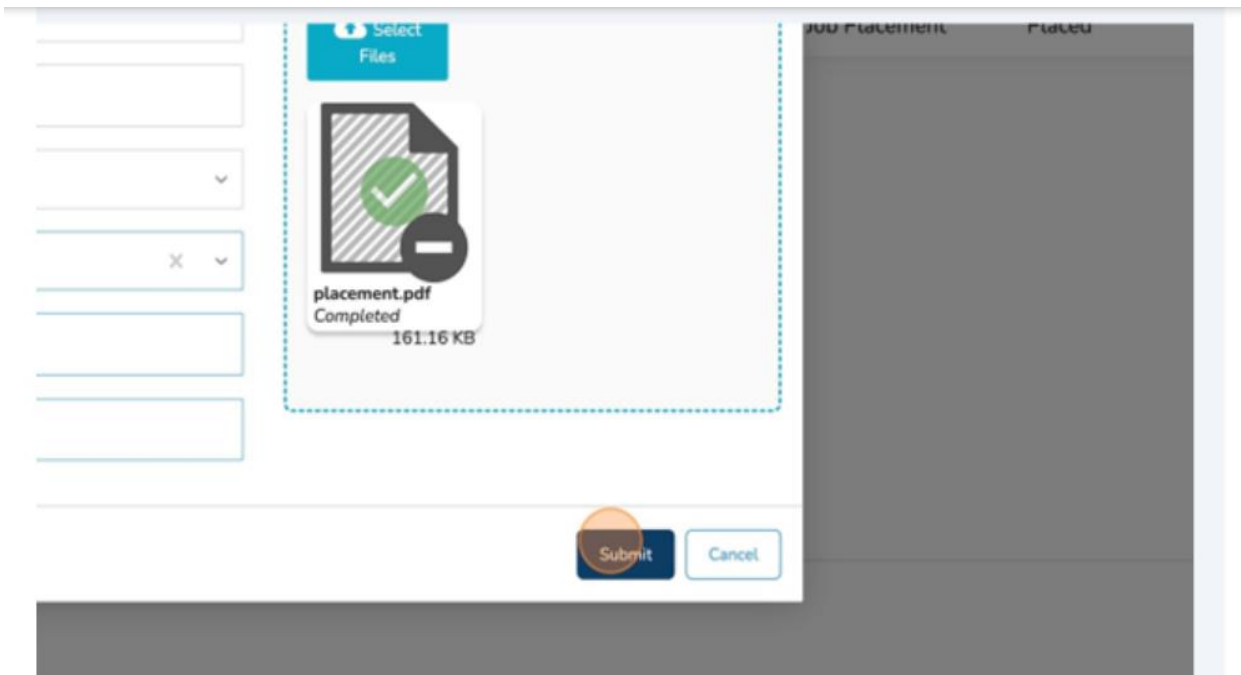
The screenshot shows a web form with several input fields. On the left side, there are fields for 'Contract Date' (03/2024), 'Hourly Wage' (10), 'Hourly Incentive', 'Weeks', 'Hours' (20), 'Submitted Amount' (1,280), 'Actual Amount' (10), and 'Assign to'. On the right side, there are dropdown menus for 'Agreement Type' (Placement with Incentive), 'Program/Fund (ES/ODSP)' (General Support), and 'Status' (Placed). Below these is a 'Note' field with a vertical cursor and an orange circle highlighting it. At the bottom right, there is a file upload area with a 'Select Files' button and a 'Drop files here' instruction.

31. Insert the appropriate "Note."

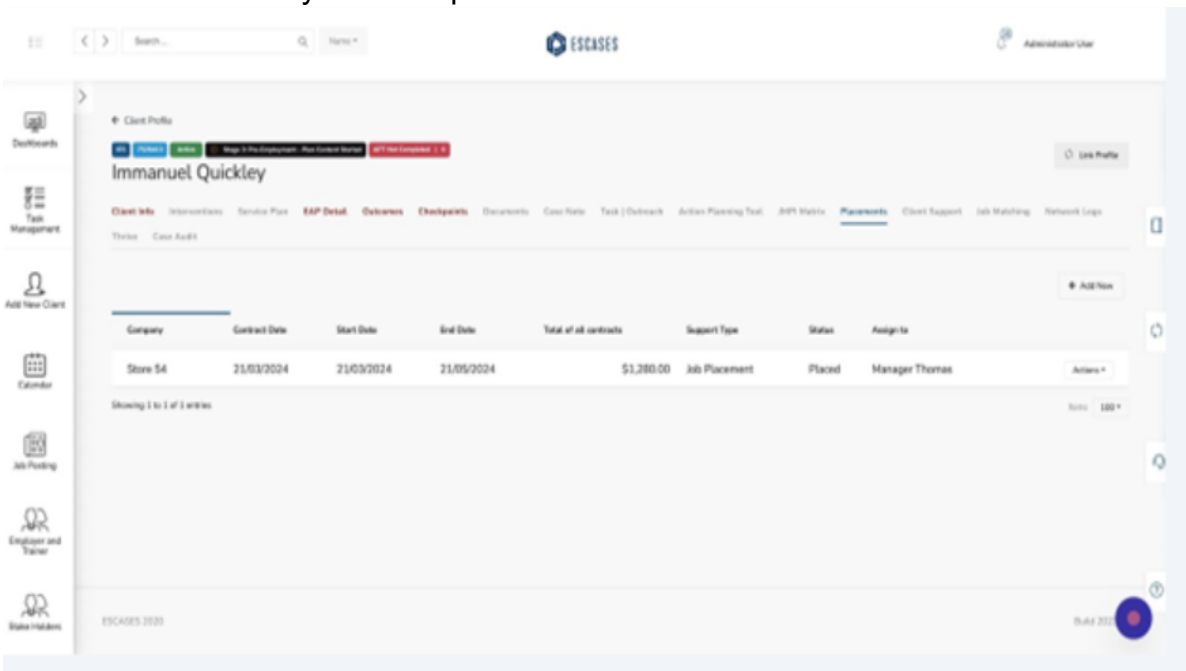
32. Click the "Select Files" upload box to attach the placement document(s).

This screenshot shows the same web form as above, but with the 'Note' field now containing the text 'This is placement stuff'. The 'Status' dropdown is still set to 'Placed'. The 'Select Files' button in the file upload area is highlighted with a yellow circle, indicating it should be clicked next.

33. Click "Submit."



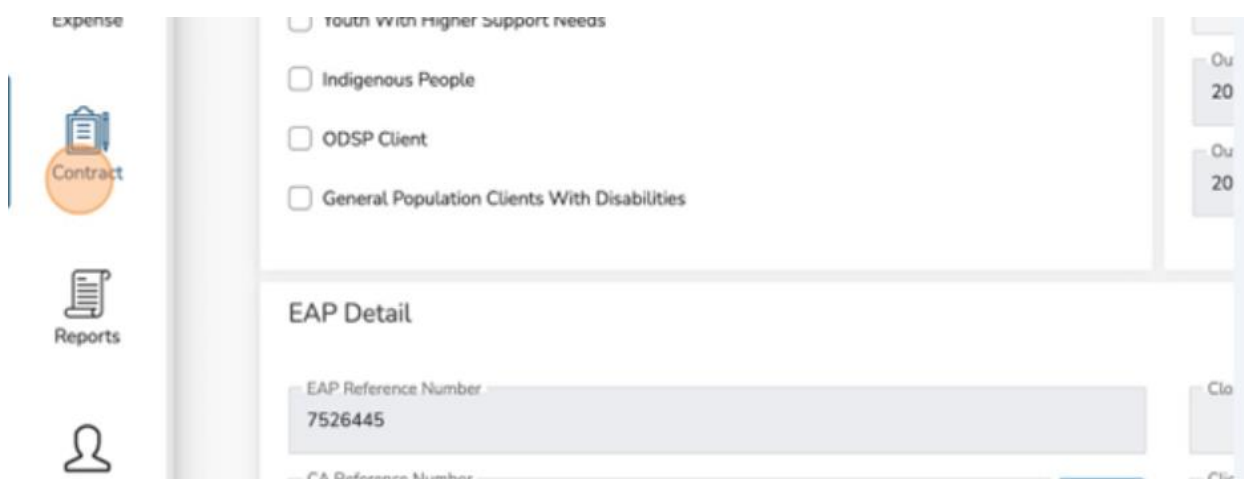
You have successfully added a placement.



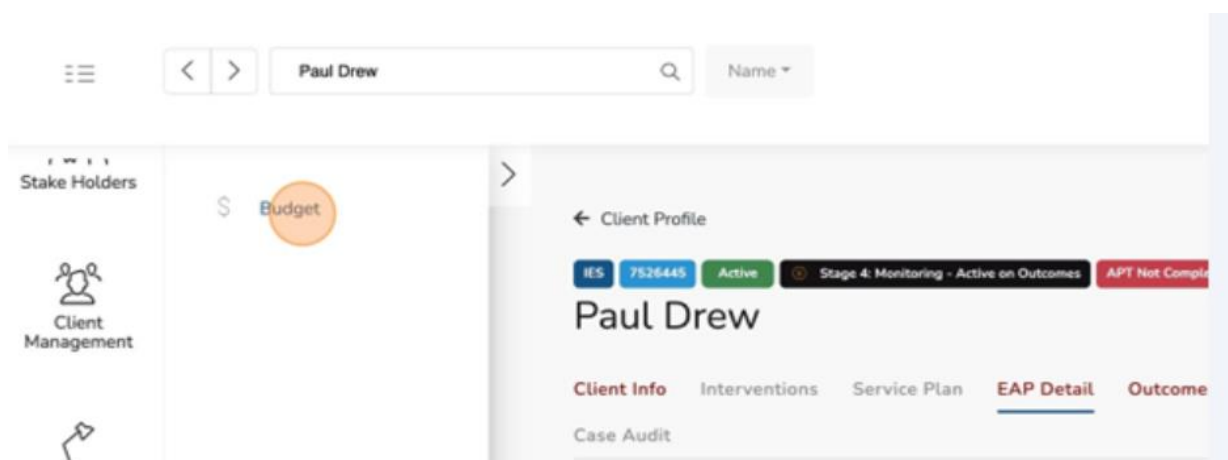
## (19) Budget Settings - Contract

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

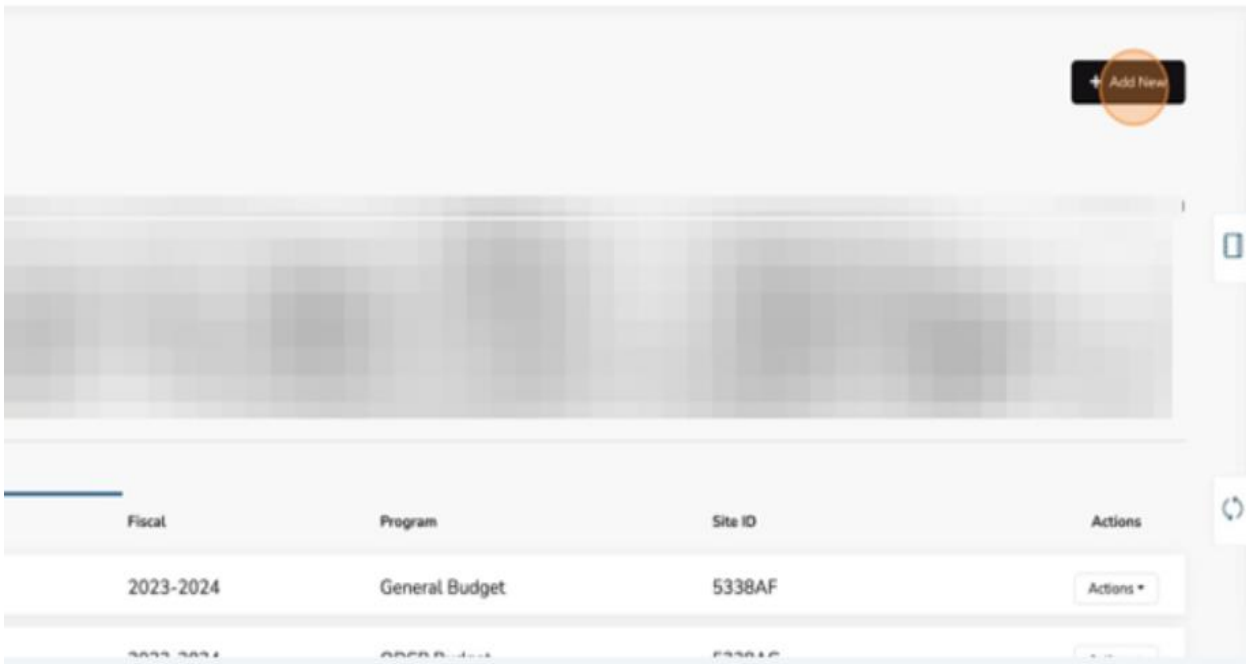
1. Click on the three lines at the top left-hand corner.
2. Click “Contract” on the left navigation bar.



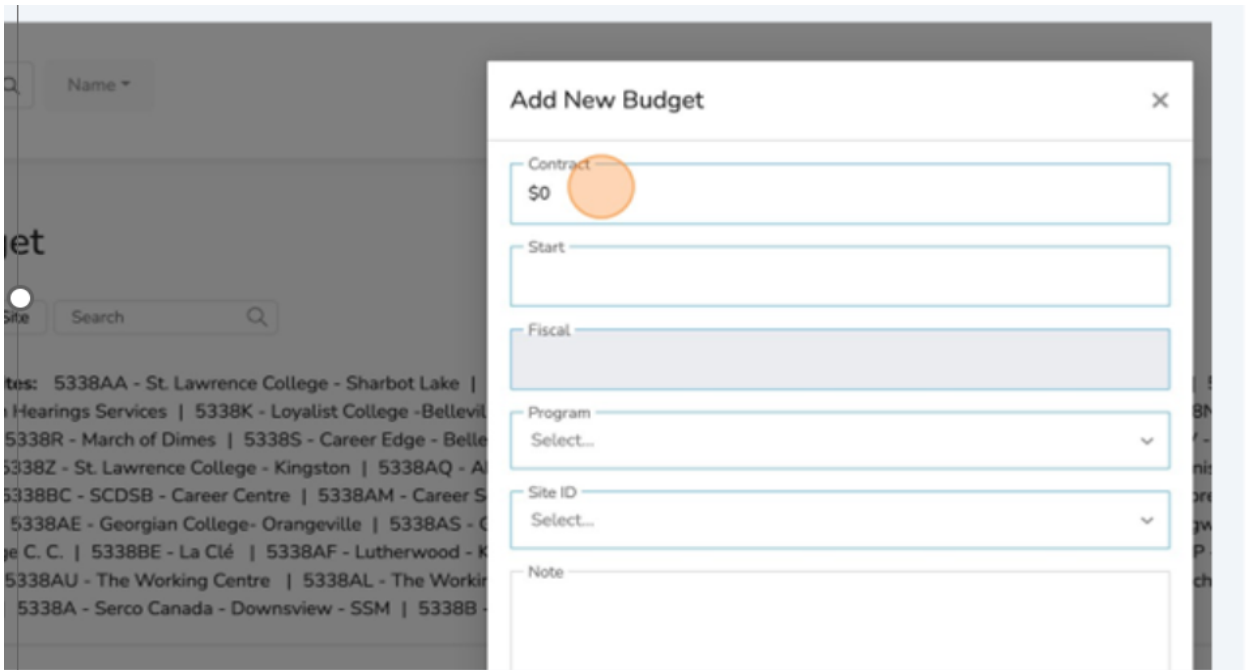
3. Click “Budget.”



4. Click "Add New."



5. Click the "Contract" field.



6. Input the appropriate budget amount.

7. Click the "Start" field.

The screenshot shows a web interface for budget management. On the left, there is a sidebar with a search bar and a list of sites. The main area contains a form with several fields: 'Contract' (value: \$1,000,000.00), 'Start' (highlighted with an orange circle), 'Fiscal' (greyed out), 'Program' (dropdown menu), 'Site ID' (dropdown menu), and 'Note'.

Contract: \$1,000,000.00

Start

Fiscal

Program: Select...

Site ID: Select...

Note

Filter by Site Search

Selected Sites: 5338AA - St. Lawrence College - Sharbot Lake | Canadian Hearings Services | 5338K - Loyalist College - Belleville | 5338R - March of Dimes | 5338S - Career Edge - Belleville | 5338Z - St. Lawrence College - Kingston | 5338AQ - Algonquin College - Ottawa (VB) | 5338BC - SCDSB - Career Centre | 5338AM - Career Services - Ottawa (VB) | 5338AE - Georgian College - Orangeville | 5338AS - Carleton Place C. C. | 5338BE - La Clé | 5338AF - Lutherwood - Kingston | 5338AU - The Working Centre | 5338AL - The Working Centre - Ottawa | 5338A - Serco Canada - Downsview - SSM | 5338B -

8. Select the appropriate "Start Date."

The screenshot shows the same budget form as in the previous image, but with a calendar overlay for the 'Start' field. The calendar is for April 2024, and the date '1' is highlighted with an orange circle. The 'Contract' field still shows \$1,000,000.00.

Contract: \$1,000,000.00

Start

April 2024

Su	Mo	Tu	We	Th	Fr	Sa
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4


# Contract

9. Select the "Program" field.

Contract  
\$1,000,000.00

Start  
01/04/2024

Fiscal  
2024-2025

Program  
Select... 

Site ID  
Select...

Note

Search

538AA - St. Lawrence College - Sharbot Lake |  
gs Services | 5338K - Loyalist College - Bellevil  
- March of Dimes | 5338S - Career Edge - Belle  
St. Lawrence College - Kingston | 5338AQ - A  
- SCDSB - Career Centre | 5338AM - Career S  
E - Georgian College- Orangeville | 5338AS - C  
| 5338BE - La Clé | 5338AF - Lutherwood - K  
)- The Working Centre | 5338AL - The Workin


5338F -  
BN - Cotna  
f - Caree  
nisfil | 53  
real | 53  
ywood | 5  
P - Region  
chner | 5

10. Select the appropriate "Budget Type."

Contract  
\$1,000,000.00

Start  
01/04/2024

Fiscal  
2024-2025

Program  
Select...   
ODSP Budget  
General Budget  
PBFT

Search

538AA - St. Lawrence College - Sharbot Lake |  
Services | 5338K - Loyalist College - Bellevil  
March of Dimes | 5338S - Career Edge - Belle  
t. Lawrence College - Kingston | 5338AQ - A  
SCDSB - Career Centre | 5338AM - Career S  
- Georgian College- Orangeville | 5338AS - C  
5338BE - La Clé | 5338AF - Lutherwood - K  
- The Working Centre | 5338AL - The Workin  
- Serco Canada - Downsview - SSM | 5338B

5338F  
BN - Cot  
f - Caree  
nisfil | 5  
real | 53  
ywood | 5  
P - Regi  
chner |

Contract

Prog

11. Click the "Site ID" field.

The screenshot shows a search dropdown on the left with a list of contract entries. On the right, a form panel contains several fields: a currency field with the value \$1,000,000.00, a Start date field with 01/04/2024, a Fiscal year field with 2024-2025, a Program dropdown with ODSP Budget, a Site ID dropdown with a search icon and a downward arrow, and a Note text area. An orange circle highlights the Site ID dropdown.

#	Contract
1	\$10,000.00
2	\$5,000.00
3	\$1,000,000.00
4	\$1,000,000.00
5	\$10,000.00

12. Select the appropriate "Site ID."

The screenshot shows a dropdown menu for Site ID selection. The menu is open, displaying a list of Site IDs: 5338AL, 5338BG, 5338AG, 5338AV, 5338AH, 5338BD, 5338A (highlighted with a blue bar and an orange circle), and 5338B. The background shows a table with contract details.

#	Contract	Amount	Start Date	Fiscal Year
1		\$10,000.00		
2		\$5,000.00		
3		\$1,000,000.00	05/03/2024	2023-2024
4		\$1,000,000.00	04/03/2024	2023-2024
5		\$10,000.00	18/09/2023	2023-2024

13. Click "Submit."

The screenshot shows a budget entry interface. A modal dialog box is open in the center, containing a "Site ID" field with the value "5338A" and a "Note" field. At the bottom of the dialog are "Submit" and "Cancel" buttons. The background is a table of budget entries. The table has columns for amount, start date, fiscal year, and program type. The entries are:

Amount	Start Date	Fiscal Year	Program
\$10,000.00	06/03/2024	2023-2024	ODSP Budget
\$1,000,000.00	05/03/2024	2023-2024	ODSP Budget
\$1,000,000.00	04/03/2024	2023-2024	General Budget

You have successfully added a New Budget.

The screenshot shows a dashboard with a sidebar on the left containing icons for Client Management, CRM Explorer, Workshop and Event, Message and Expense, Contact, and Reports. The main area displays a table of budget entries. The table has columns for #, Contract, Start, Fiscal, Program, Site ID, and Actions. The first row is highlighted with an orange circle around the "Actions" column.

#	Contract	Start	Fiscal	Program	Site ID	Actions
1	\$1,000,000.00	01/04/2024	2024-2025	ODSP Budget	5338A	Actions*



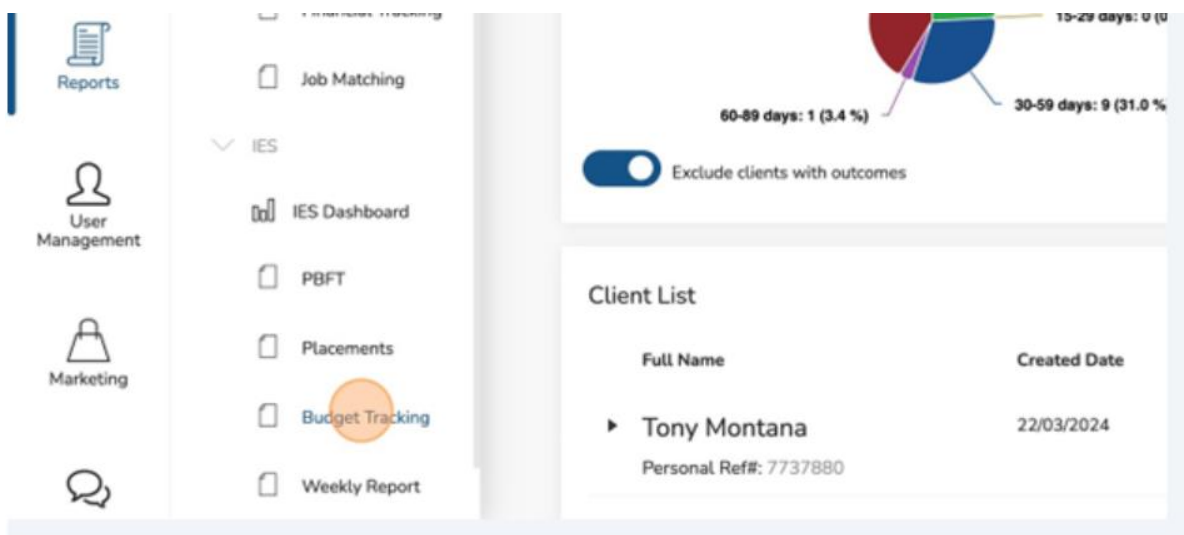
## (20) Budget Tracking Report

- ✓ 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.

General Budget: \$1,010,000		ODSP Budget: \$1,000,005	
Committed	\$106,929.5	Committed	
Return	\$40,923	Return	
Spent	\$66,006.5	Spent	
Available	\$943,993.5	Available	

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

ODSP Budget: \$1,000,005		Financial Support Categories	
,929.5	Committed	\$469	Support Type
0,923	Return	\$152	Job seeker - Academic credential or profession
,006.5	Spent	\$317	Job seeker - Accommodation needs - assistive
,993.5	Available	\$999,688	

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

4. Click the chevron to expand the "Financial Support Categories" view.

1/03/2024 Reset

	Financial Support Categories				
	Support Type	Total	Stream A	Stream B	Stream C
\$469	Job seeker - Academic credential or professional accreditation assessment	\$0.00	\$0.00	\$0.00	\$0.00
\$152	Job seeker - Accommodation needs - assistive devices and adaptive technology	\$4,105.00	\$18.00	\$567.00	\$3,520.00
\$317					
\$999,688					

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

	Financial Support Categories				
	Support Type	Total	Stream A	Stream B	Stream C
\$469	Job seeker - Academic credential or professional accreditation assessment	\$0.00	\$0.00	\$0.00	\$0.00
\$152	Job seeker - Accommodation needs - assistive devices and adaptive technology	\$4,105.00	\$18.00	\$567.00	\$3,520.00
\$317	Job seeker - Accommodation needs - job-specific communication skills training	\$12.00	\$0.00	\$0.00	\$12.00
\$999,688	Job seeker - Accommodation needs - on-the-job supports	\$210.00	\$0.00	\$10.00	\$200.00
	Job seeker - Certification charges	\$224.00	\$0.00	\$0.00	\$224.00
	Job seeker - Diagnostic assessment	\$20.00	\$0.00	\$0.00	\$20.00
	Job seeker - Emergency/frequent child care	\$0.00	\$0.00	\$0.00	\$0.00

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

**Budget Tracking**

General Budget \$1,030,000

Committed	\$106,929.5	Committed	\$489
Return	\$40,923	Return	\$152
Spent	\$66,006.5	Spent	\$317
Available	\$943,993.5	Available	\$909,686

OOSP Budget \$1,000,000

Committed	\$489
Return	\$152
Spent	\$317
Available	\$909,686

Financial Support Categories

Support Type	Total	Stream A	Stream B	Stream C
Job seeker - Academic credential or professional accreditation assessment	\$0.00	\$0.00	\$0.00	\$0.00
Job seeker - Accommodation needs - assistive devices and adaptive technology	\$4,150.00	\$0.00	\$4,150.00	\$0.00

Client Support - Employer Support

#	Client Name	Support Type	Committed Amount	Actual Amount	Post Date	Budget	Remarks	Status	Action
1	Aaron Williams	Job seeker - Accommodati...	\$200	\$200	21/03/2024	General	This device is required for ...	Completed	Action*
2	Alan Anderson	Job seeker - Accommodati...	\$200	\$0	07/03/2024	General	test	Draft	Action*
3	Alan Anderson	Job seeker - Accommodati...	\$0	\$0	02/03/2024	OOSP	isPuffBl	Draft	Action*

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

Client Management

Committed	\$106,929.5	Committed	
Return	\$40,923	Return	
Spent	\$66,006.5	Spent	
Available	\$943,993.5	Available	

iAMS Explorer

Workshop and Event

Mileage and Expense

Client Support **Employer Support**

#	Client Name	Support Type	Committed Amount
	Aaron Williams	Job seeker - Accommodati...	\$200
	Alan Anderson	Job seeker - Accommodati...	\$200

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

The screenshot shows a dashboard with a sidebar on the left containing icons for Home, Case Files, Workflows and Tools, Usage and Support, Contact, Reports, User Management, and Helpdesk. The main content area is divided into three sections:

- General Budget: \$1,033,000**

Committed	\$108,929.5
Return	\$40,923
Spent	\$68,006.5
Available	\$943,993.5
- OOSP Budget: \$1,000,000**

Committed	\$489
Return	\$152
Spent	\$317
Available	\$999,688
- Financial Support Categories** (Chevron icon highlighted)

Below these sections is a table for 'Client Support' with the following data:

#	Client Name	Support Type	Committed Amount	Actual Amount	Post Date	Budget	Comments	Status	Action
1	Aaron Williams	Job Placement	\$4,800	\$0.00	19/03/2024	General	This is placement staff	Placed	Action
2	Aaron Williams	Job Placement	\$1,000	\$0	21/03/2024	General		Placed	Action
3	Adam Seckler		\$1,000	\$1,000	09/02/2024	General		Placed	Action
4	Adam Seckler	Job Placement	\$3,000	\$0	20/03/2024	General		Placed	Action
5	Adam Seckler	Job Placement	\$0	\$0	21/03/2024	General	Test	Placed	Action
6	Adam Z Ciol	Job Placement	\$900	\$200	21/03/2024	General		Placed	Action
7	Alan Anderson	Job Placement	\$0	\$0	21/03/2024	General		Employed	Action

A full view of all Placement items will be displayed.

The screenshot shows the ESCASES dashboard with the 'Financial Support Categories' section expanded. The top right shows the user is 'Administrator User'. The expanded view shows the following data:

Support Type	Total	Stream A	Stream B	Stream C
Job Accommodation	\$52,000.00	\$0.00	\$52,000.00	\$0.00
Job Placement	\$16,428.00	\$15.00	\$200.00	\$16,213.00
Job Trails	\$2,234.00	\$2,000.00	\$234.00	\$0.00

On the left side of the expanded view, the following values are listed:

- \$469
- \$152
- \$317
- \$999,688

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

The screenshot displays the ESCASES Placement List. At the top, there are budget tracking sections for General Budget (\$1,010,000) and OOSP Budget (\$1,000,000). Below these are summary tables for Committed, Return, Spent, and Available amounts. The main section is a table of placements with columns for Client Name, Support Type, Committed Amount, Actual Amount, Post Date, Budget, Comments, Status, and Action. An orange circle highlights the 'Employee' column header in the table.

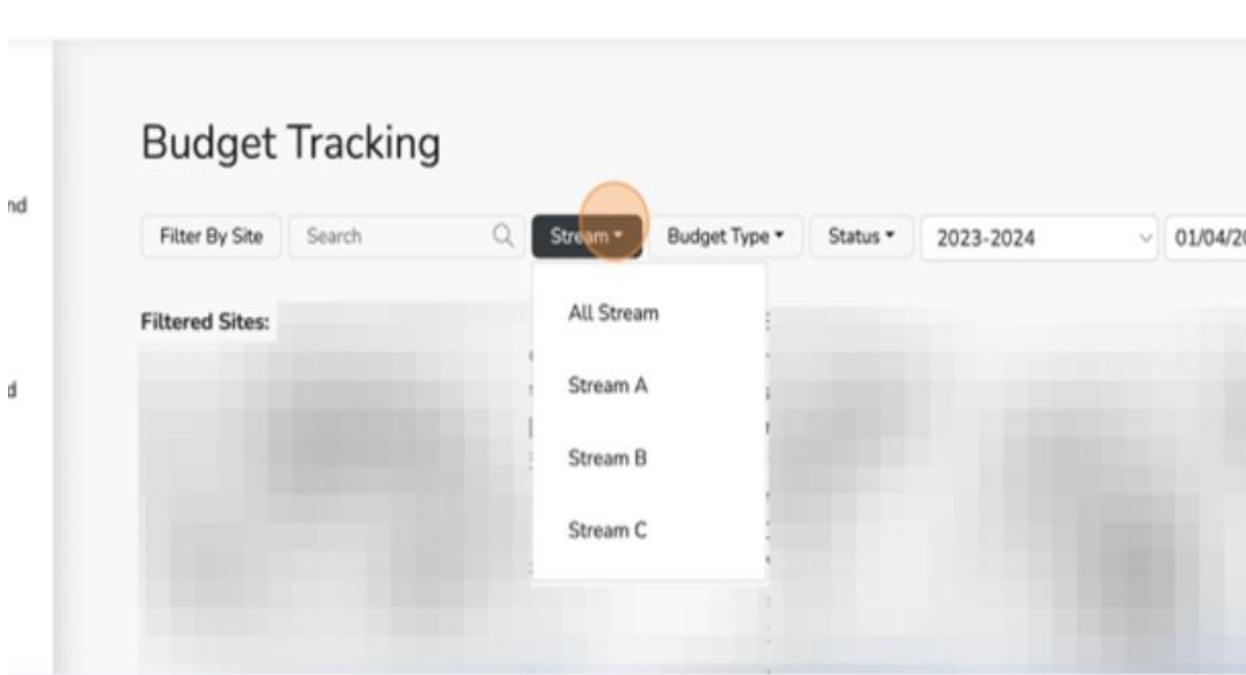
Client Name	Support Type	Committed Amount	Actual Amount	Post Date	Budget	Comments	Status	Action
Aaron Williams	Job Placement	\$4,000	\$0.00	19/03/2024	General	This is placement stuff	Placed	Action
Aaron Williams	Job Placement	\$1,000	\$0	21/03/2024	General		Placed	Action
Adam Sackler		\$1,055	\$1,055	09/02/2024	General		Placed	Action
Adam Sackler	Job Placement	\$3,000	\$0	22/03/2024	General		Placed	Action
Adam Sackler	Job Placement	\$0	\$0	21/03/2024	General	Test	Placed	Action
Adam Z Child	Job Placement	\$200	\$200	21/03/2024	General		Placed	Action

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

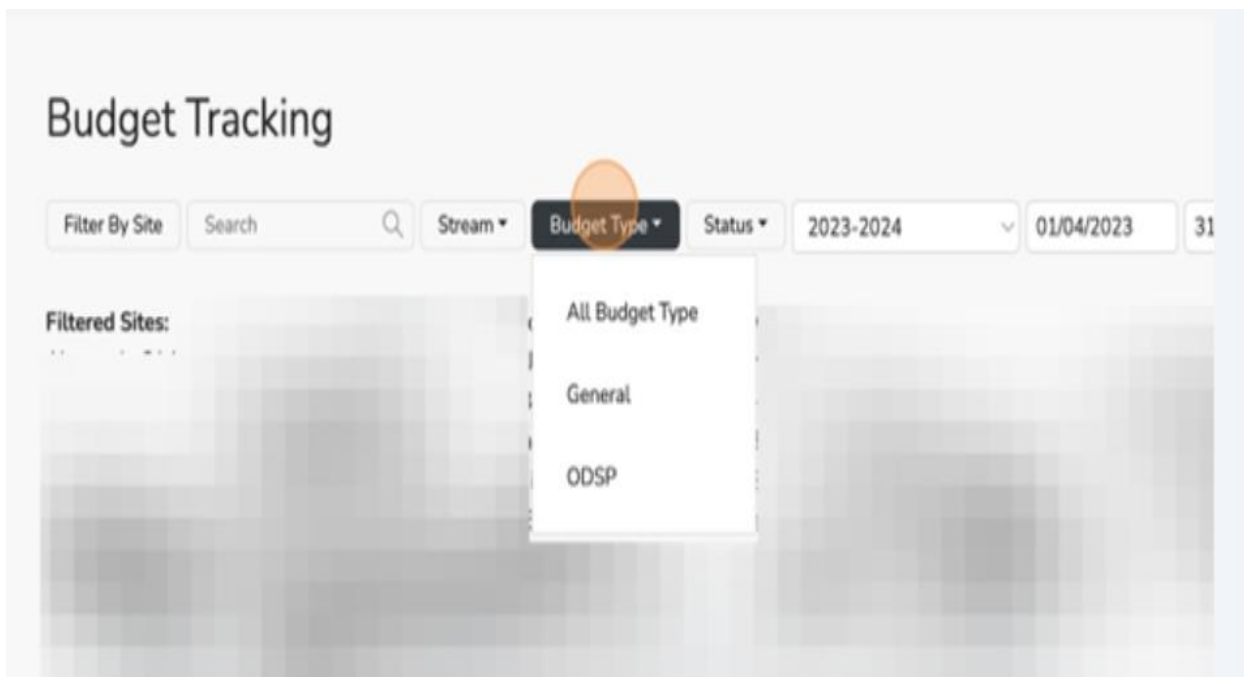
The screenshot displays the ESCASES Budget Tracking interface. At the top, there is a 'Budget Tracking' heading. Below it is a filter bar with 'Filter By Date' and 'Stream' dropdowns. An orange circle highlights the 'Filter' button in the filter bar. Below the filter bar is a 'Filtered Show' section, followed by budget tracking tables for General Budget (\$1,010,000) and OOSP Budget (\$1,000,000). The main section is a table of budget data with columns for Support Type, Total, Stream A, Stream B, and Stream C.

Support Type	Total	Stream A	Stream B	Stream C
Job seeker - Academic credential or professional accreditation assessment	\$0.00	\$0.00	\$0.00	\$0.00

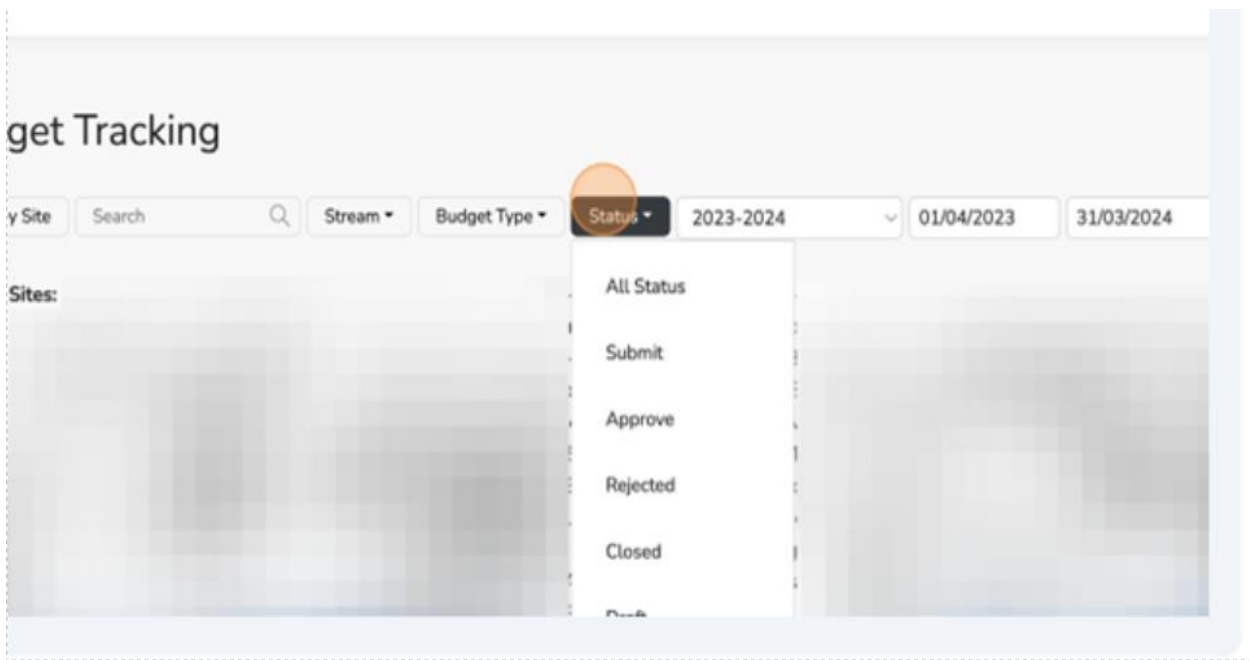
7. Click the “Stream” field to filter by stream.



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

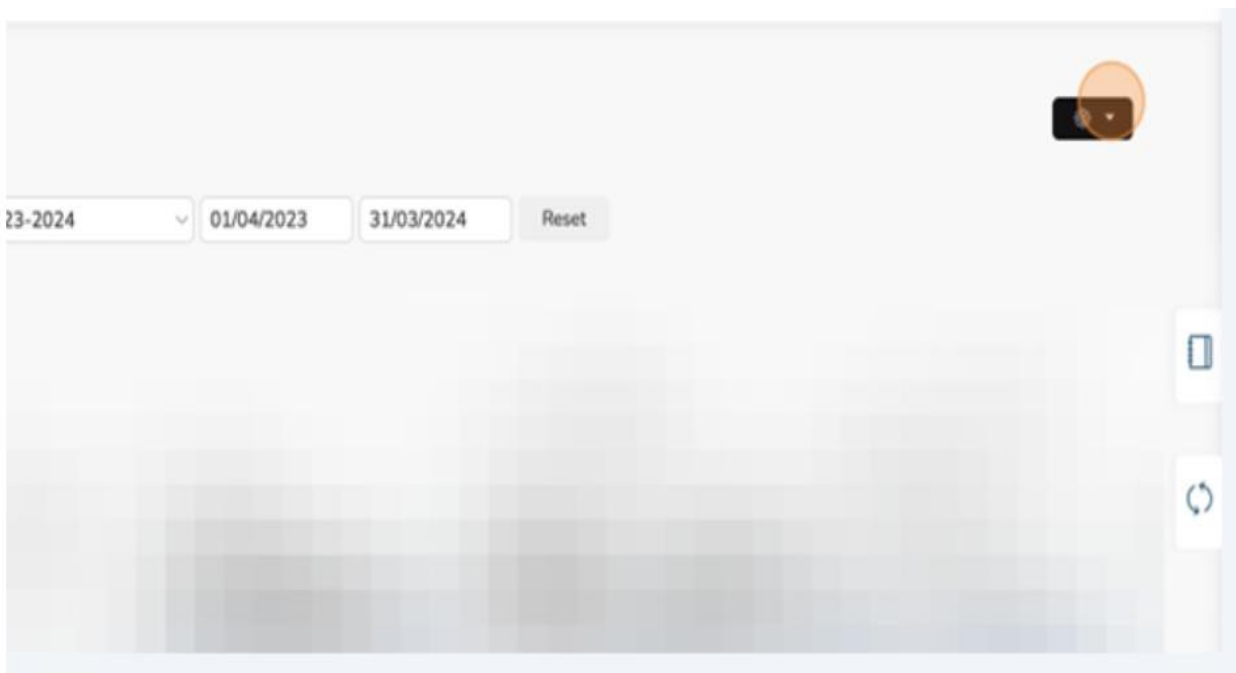


9. Click on "Status" to filter by "Status."



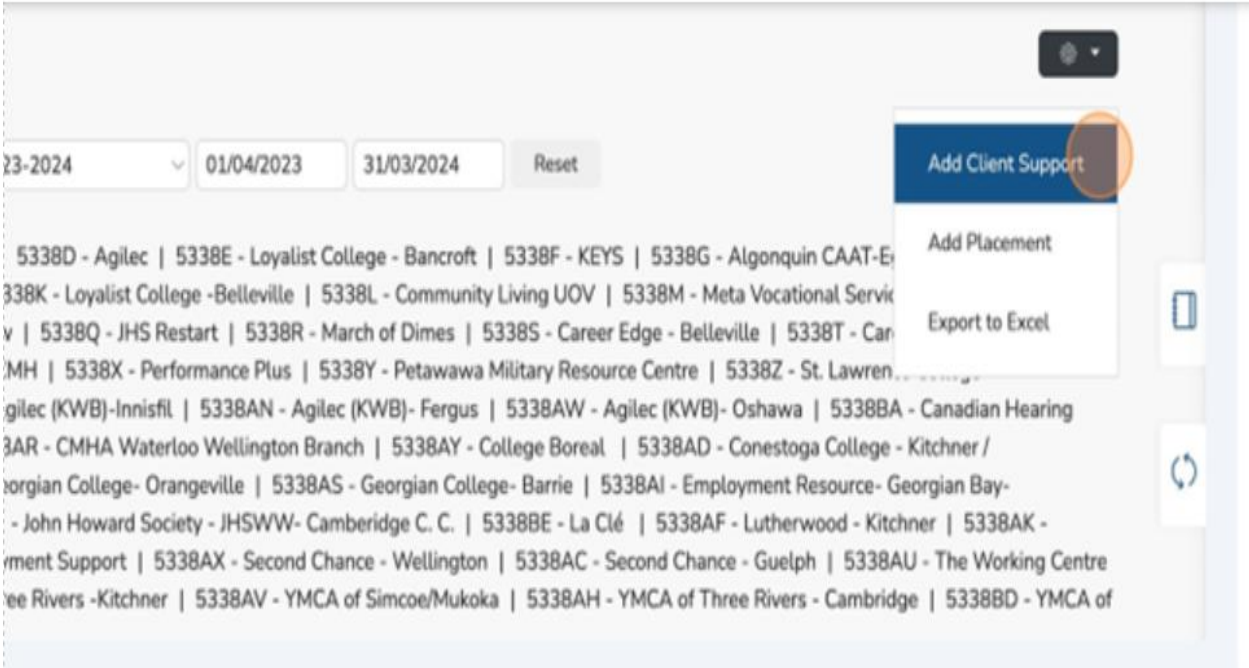
✓ You can also generate a Client Support or Placement by clicking the gear icon from the top right of the report.

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."

Apt Guy	Job seeker - Accommodati...	\$1
Aubrey Graham		\$0
Aubrey Graham		\$200
Betty Rubble	Job seeker - Accommodati...	\$5
Betty Rubble	Job seeker - Accommodati...	\$5

Showing 1 to 10 of 58 entries

2. Click "PBFT."

- Referrals
- Financial Tracking
- Job Matching
- IES
  - IES Dashboard
  - PBFT**
  - Placements

Apt Guy	Job seeker - Accommodati...	\$
Aubrey Graham		\$
Aubrey Graham		\$
Betty Rubble	Job seeker - Accommodati...	\$
Betty Rubble	Job seeker - Accommodati...	\$

Showing 1 to 10 of 58 entries

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

The screenshot shows a web interface with a 'Funding Allocation' section. A table lists three streams (Stream A, Stream B, Stream C) with columns for 1 Month, 3 Month, 6 Month, and 12 Month funding amounts, and a 'Maximum Total per Client' column. To the right, a 'Funding Allocation' summary table shows 'Maximum Performance Based Funding' at \$20,000.00, 'Performance Based Funding Served' at \$4,000.00, and 'Remaining Performance Based Funding Available' at \$16,000.00. A 'Submit' button is highlighted with an orange circle.

	1 Month	3 Month	6 Month	12 Month	Maximum Total per Client
Stream A	\$1.00	\$3.00	\$6.00	\$12.00	\$12.00
Stream B	\$30.00	\$60.00	\$90.00	\$180.00	\$180.00
Stream C	\$90.00	\$180.00	\$270.00	\$540.00	\$540.00

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

The screenshot shows a 'Stream PBF' modal form. It contains a table with columns for 1 Month, 3 Month, 6 Month, and 12 Month. The rows are for Stream A, Stream B, and Stream C. The input fields contain the following values:

	1 Month	3 Month	6 Month	12 Month
Stream A	1	3	6	12
Stream B	30	60	90	180
Stream C	90	180	270	540

A 'Submit' button is highlighted with an orange circle.



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

Edit

Month	12 Month	Maximum Total per Candidate
\$30.00	\$65.00	\$130.00
\$90.00	\$180.00	\$360.00
270.00	\$540.00	\$1,080.00

### Funding Allocation

Maximum Performance Based Funding	\$10,00
> Performance Based Funding Earned	\$54
> Remaining Performance Based Funding Available	\$39

Case Manager
Stream
EAP Outcome ...
1 Month PBF
3 Month PBF
6 Month PBF
12 Month PBF
PBF Available

## Updating Payments

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

Event

Mileage and Expense

Contract

Reports

User Management

By Staff

Select... v

Client Name	EAP Reference ...	Case Manager	Stream	EAP Outcome D...	1 Mont
▶ Laurie Skydigger	7523957	Angela Wiggins	Stream C	05-01-2024	
▶ Sean Marks	7524112	Sopheap Hok	Stream C	19-01-2024	
▶ Kevin Willis	7524114	Administrator U...	Stream C	23-01-2024	\$90.00
▶ Dee Brown	7524613	Administrator U...	Stream C	25-01-2024	
▶ Rick Grime	7523328	Administrator U...	Stream B	18-01-2024	
▶ Muggsy Bagues	7524616	Administrator U...	Stream C	30-01-2024	
▶ Dell Curry	7524618	Administrator U...	Stream C	30-01-2024	

2. Click "Add PTMS."

am	EAP Outcome D...	1 Month PBF	3 Month PBF	6 Month PBF	12 Month PBF	PBF Available
am C	05-01-2024					\$0.00
am C	19-01-2024					\$0.00
am C	23-01-2024	\$90.00				\$90.00

Completion Date	Milestone Achieved	PBF EARNED	
	Yes	\$90.00	<input type="button" value="ADD PTMS"/>
	No		<input type="button" value="ADD PTMS"/>
	No		<input type="button" value="ADD PTMS"/>

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

Kevin Willis

Stream A	\$5.00	\$30.00
Stream B	\$30.00	\$60.00
Stream C	\$90.00	\$180.00

By Staff  
Select...

Client Name	EAP Reference ...	Ca
▶ Laurie Skydigger	7523957	Ar
▶ Sean Marks	7524112	Se

### Month PBF PMTS

Month PBF Paid Q1:

Month PBF Paid Q2:

Month PBF Paid Q3:

Month PBF Paid Q4:

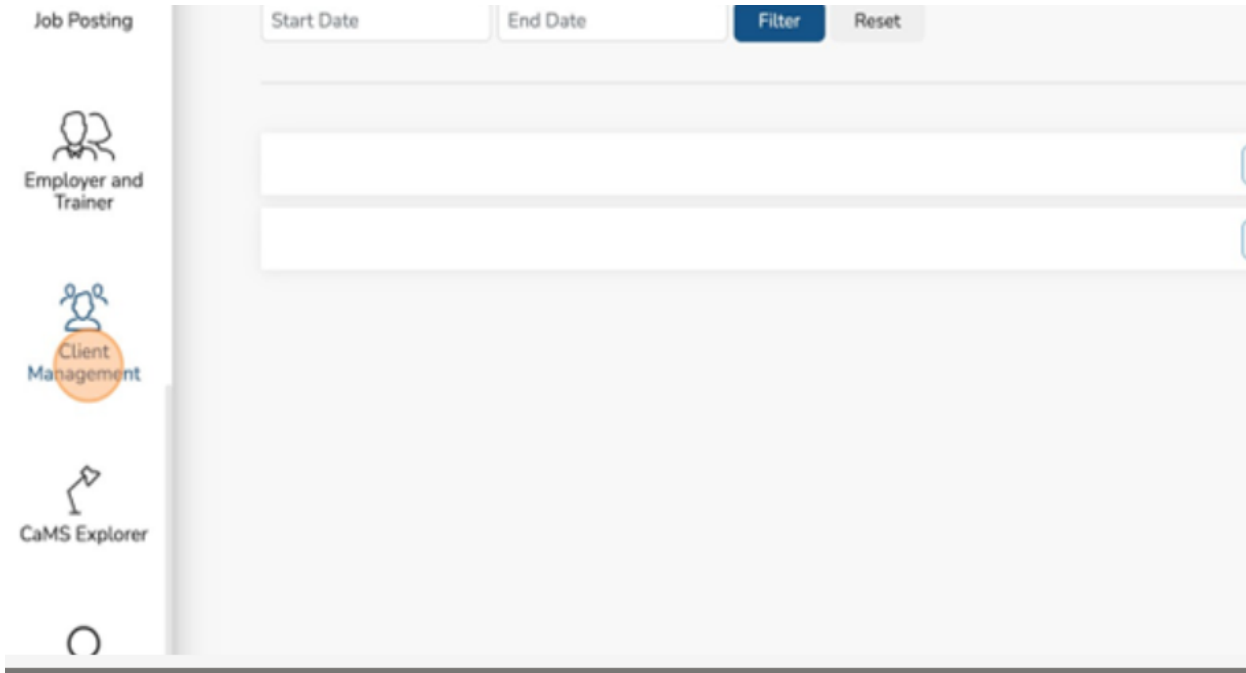
Month PBF Variance:



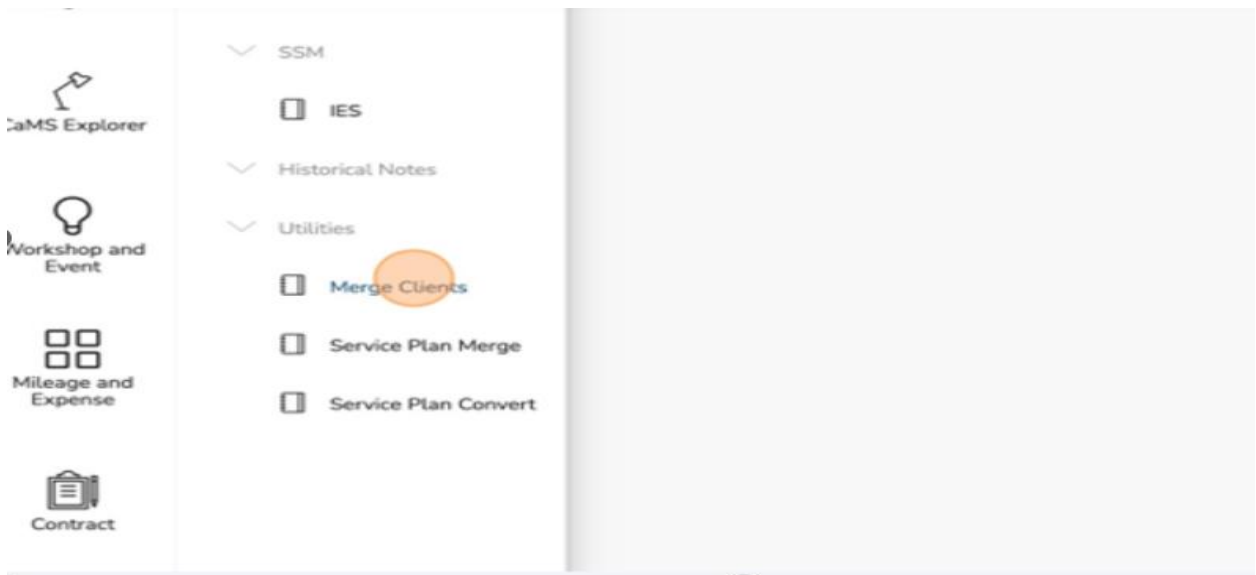
## (25) Admin Tools - Merging Client Profiles

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

1. Click “Client Management.”

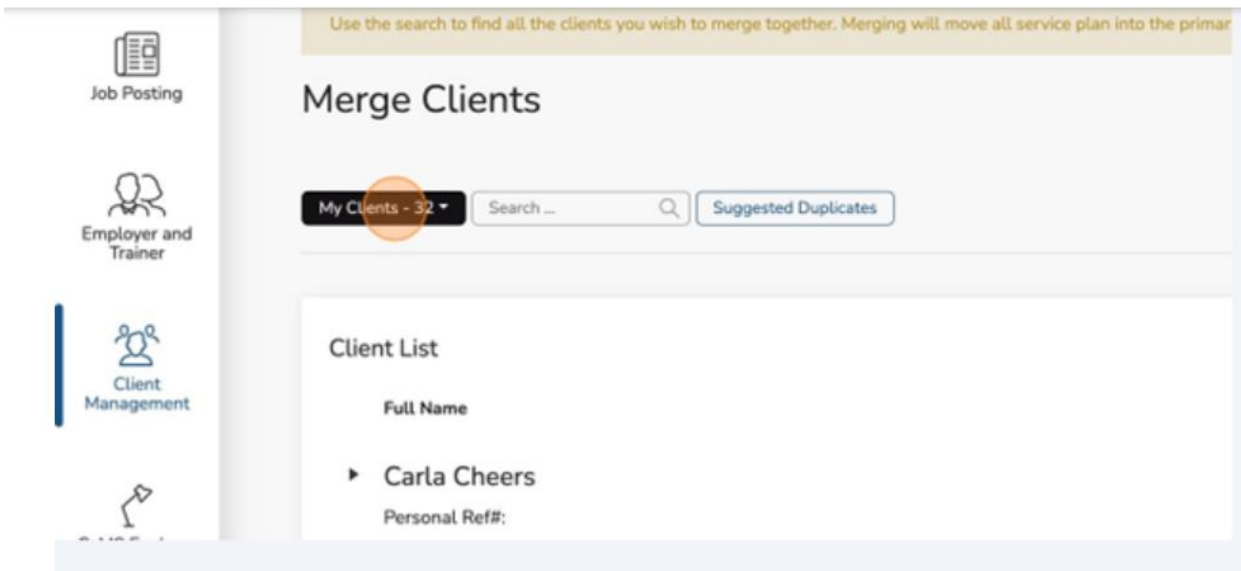


2. Click “Merge Clients.”

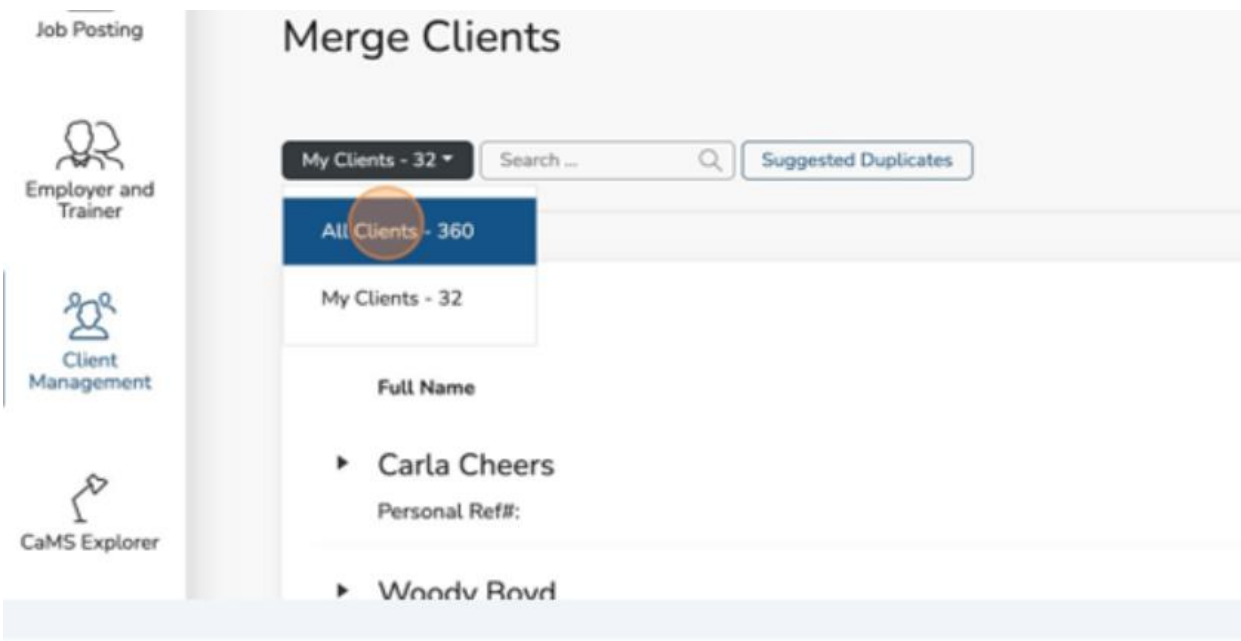




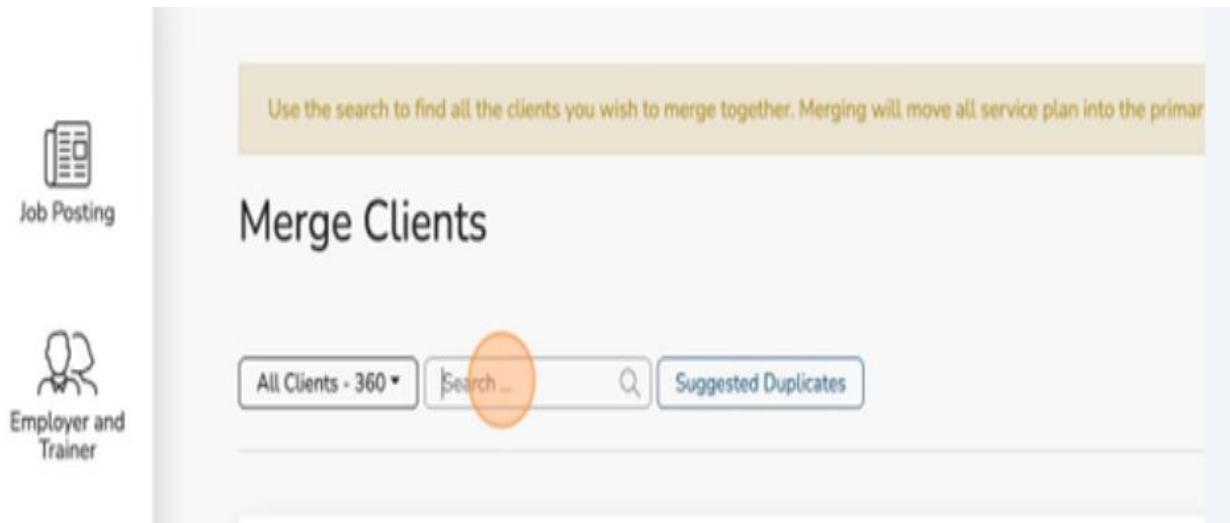
3. Click "My Clients."



4. Click "All Client."



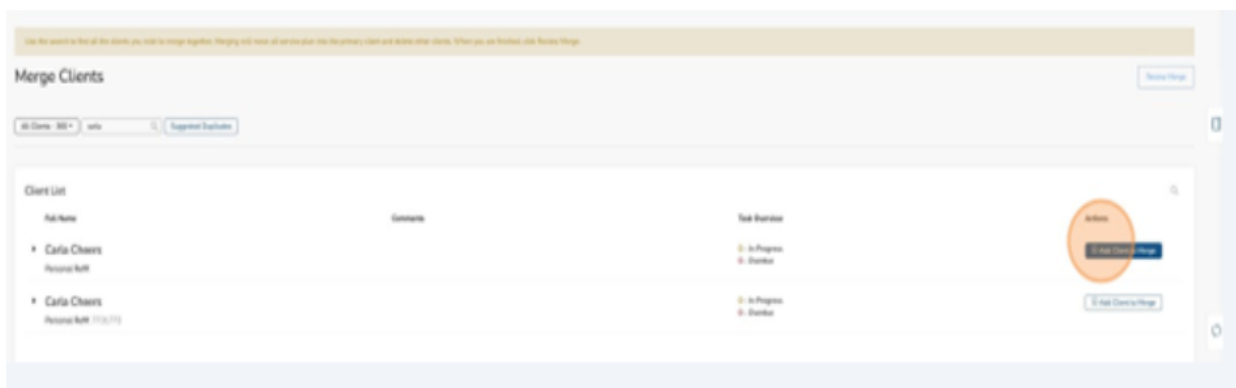
5. Click the “Search” field.



6. Enter the client Name.

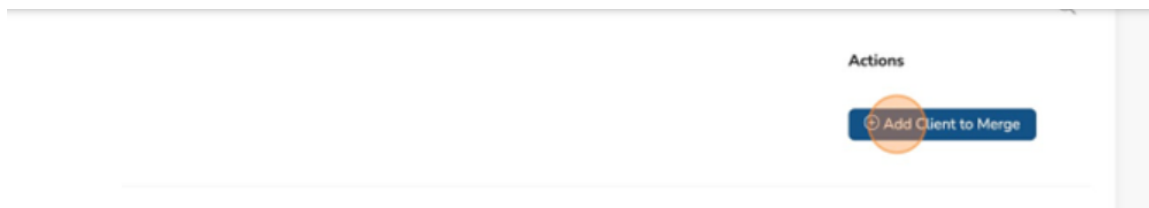
7. Locate the client profile you want to add to the merge.

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.”

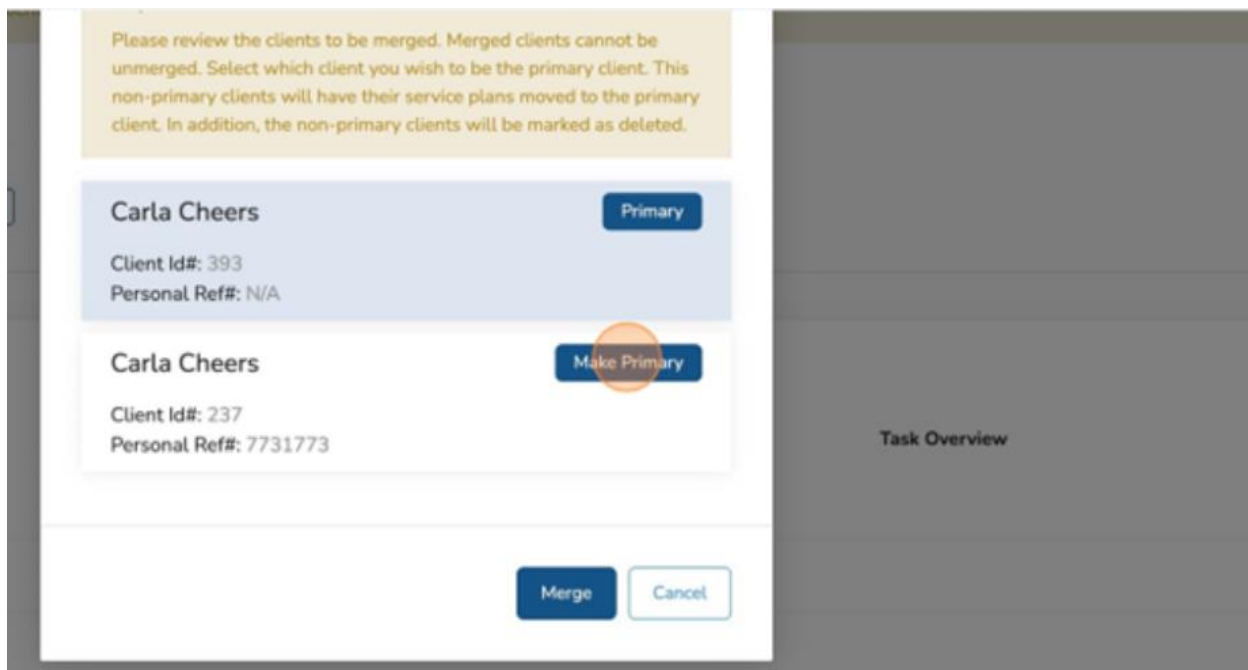


11. Click “Review Merge.”

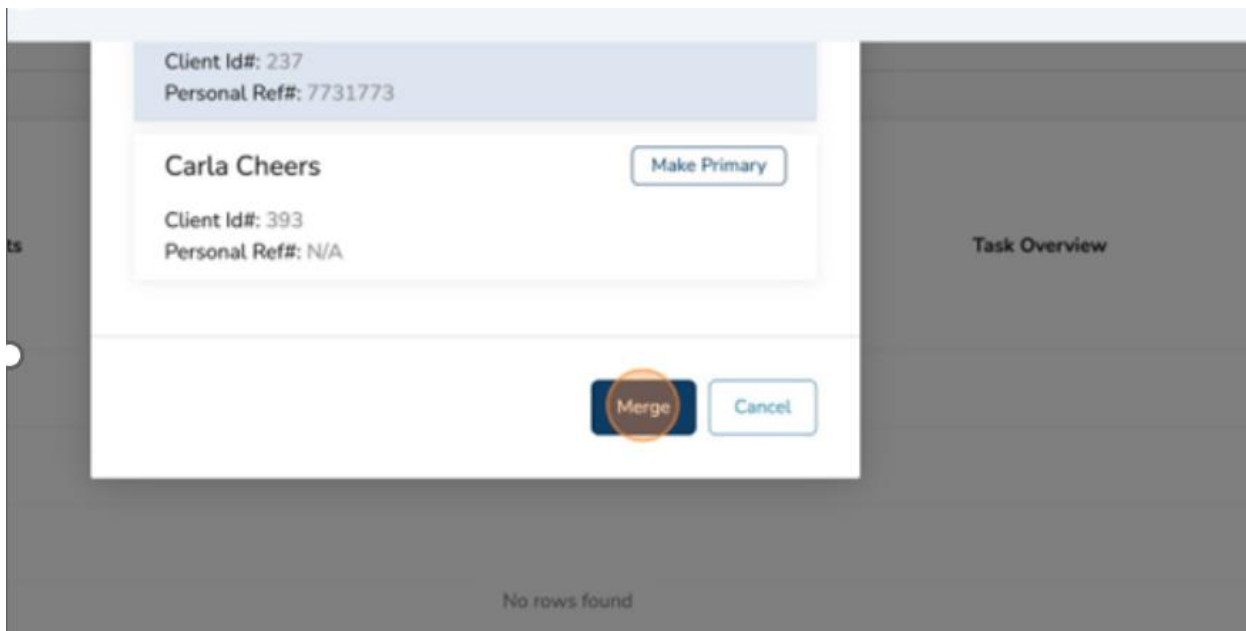


- Alert! Ensure you identify the appropriate profile as the “Primary” profile. Choosing the "Primary" profile will set this client as the main profile moving forward. All other profiles involved in this merge will be consolidated into the primary profile.

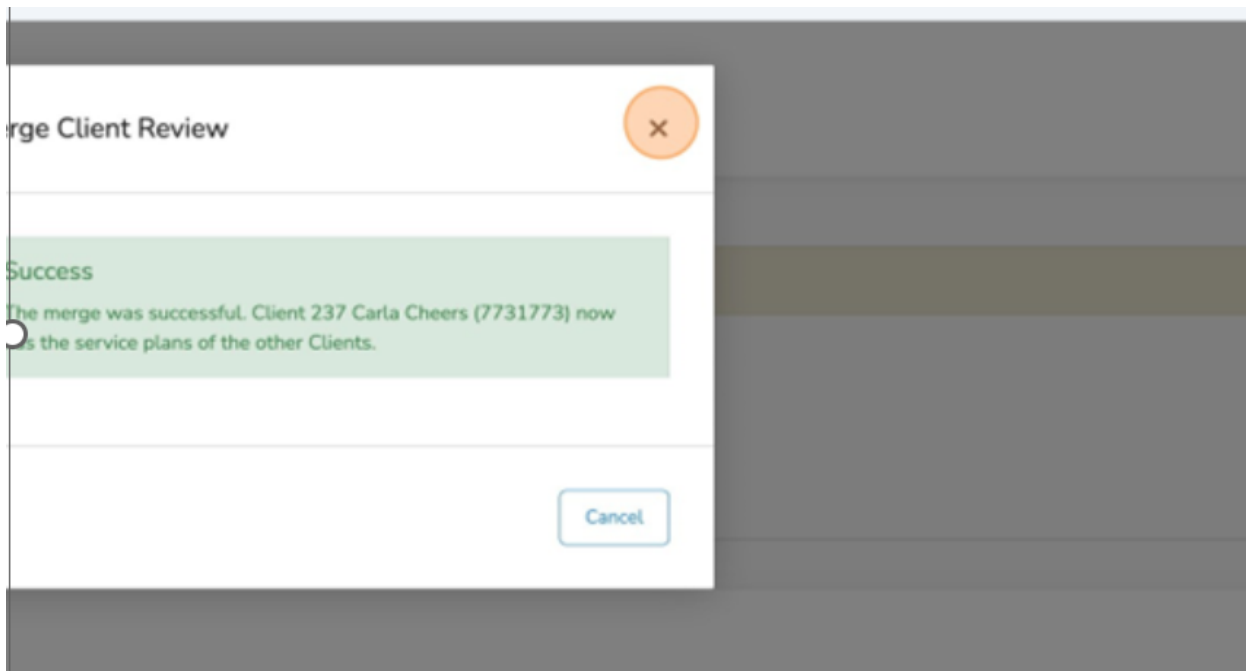
12. Click “Make Primary.”



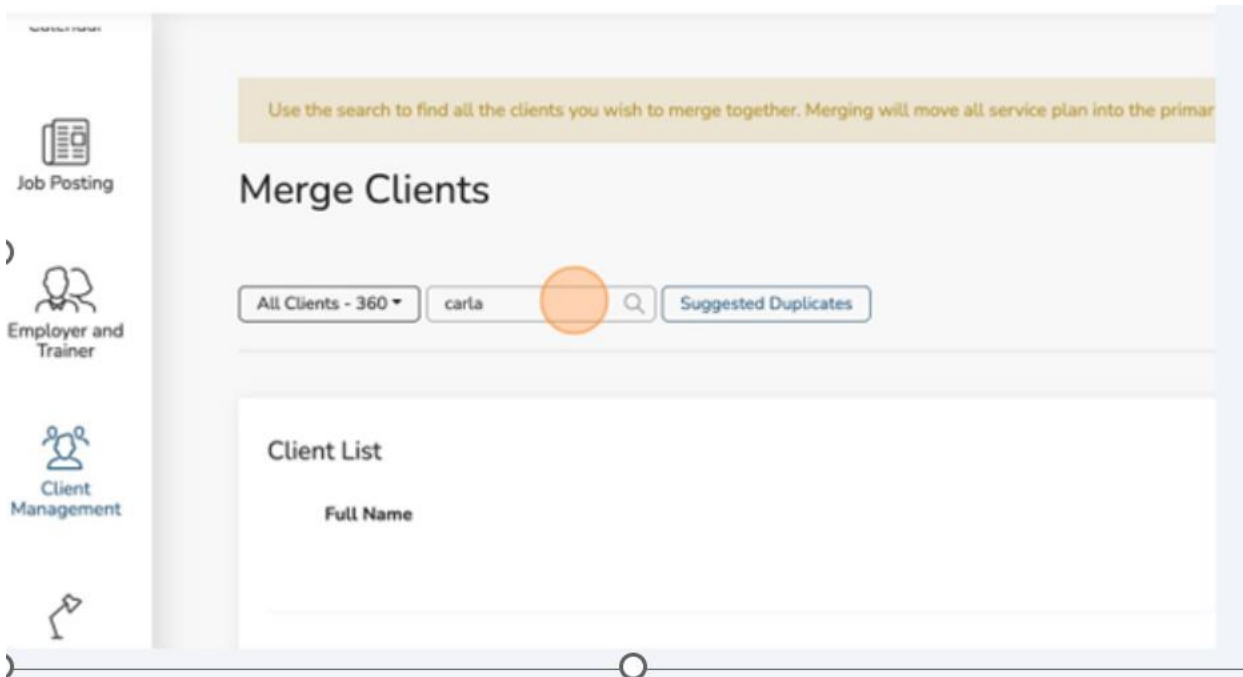
13. Click "Merge."



14. Click "X" to close.

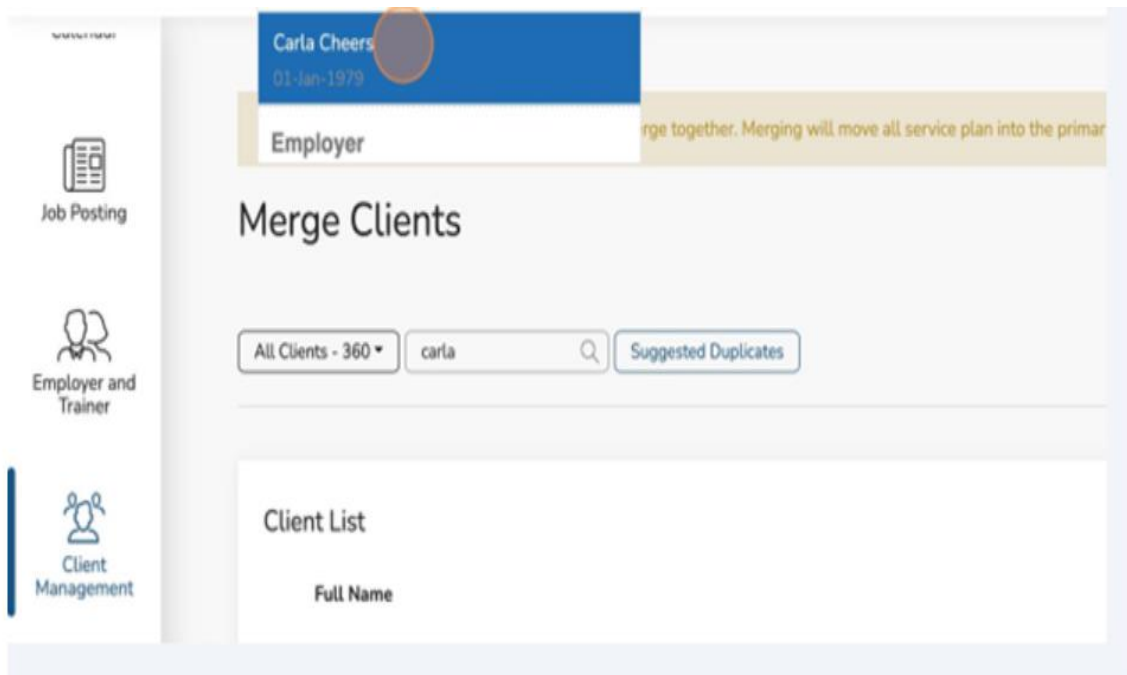


15. Click the “Search” field.

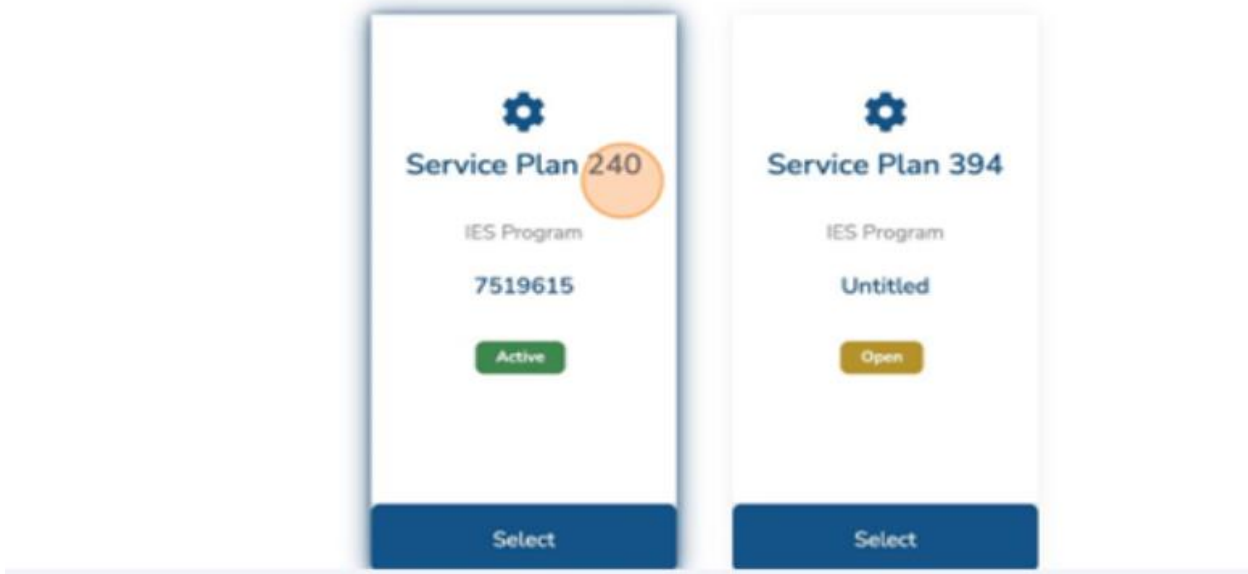


16. Type the name of the client profile you just merged.

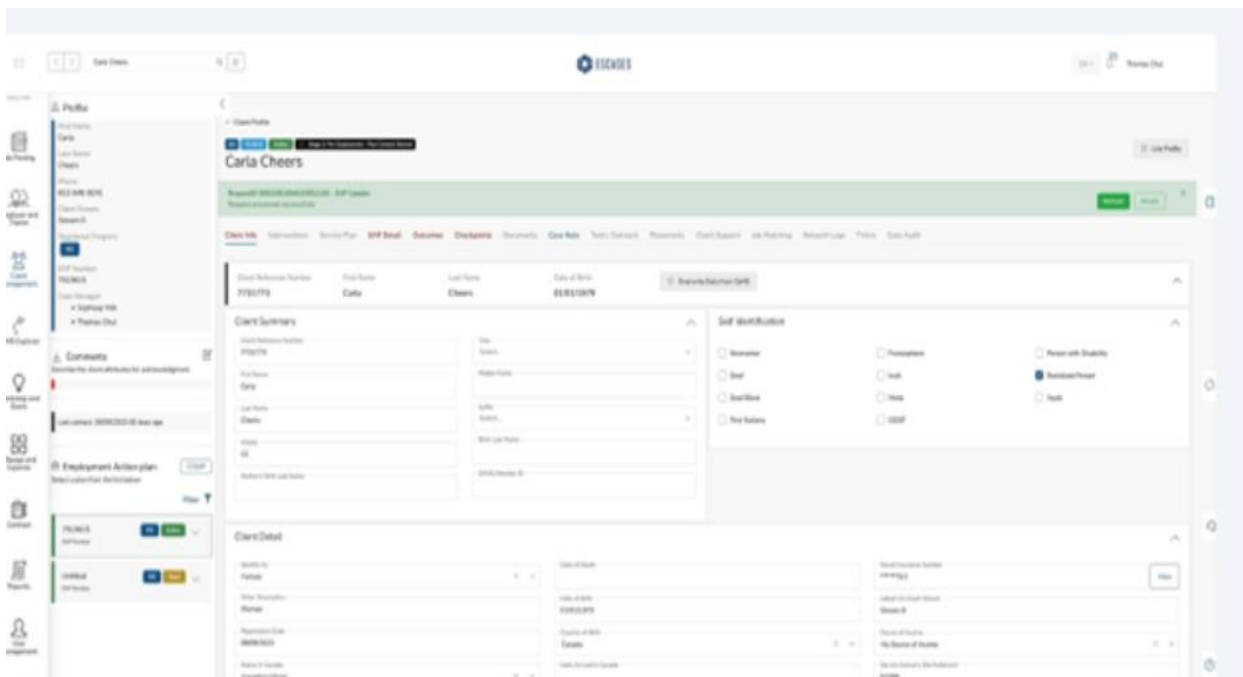
17. Select the “Client profile.”



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



You have successfully merged profiles.

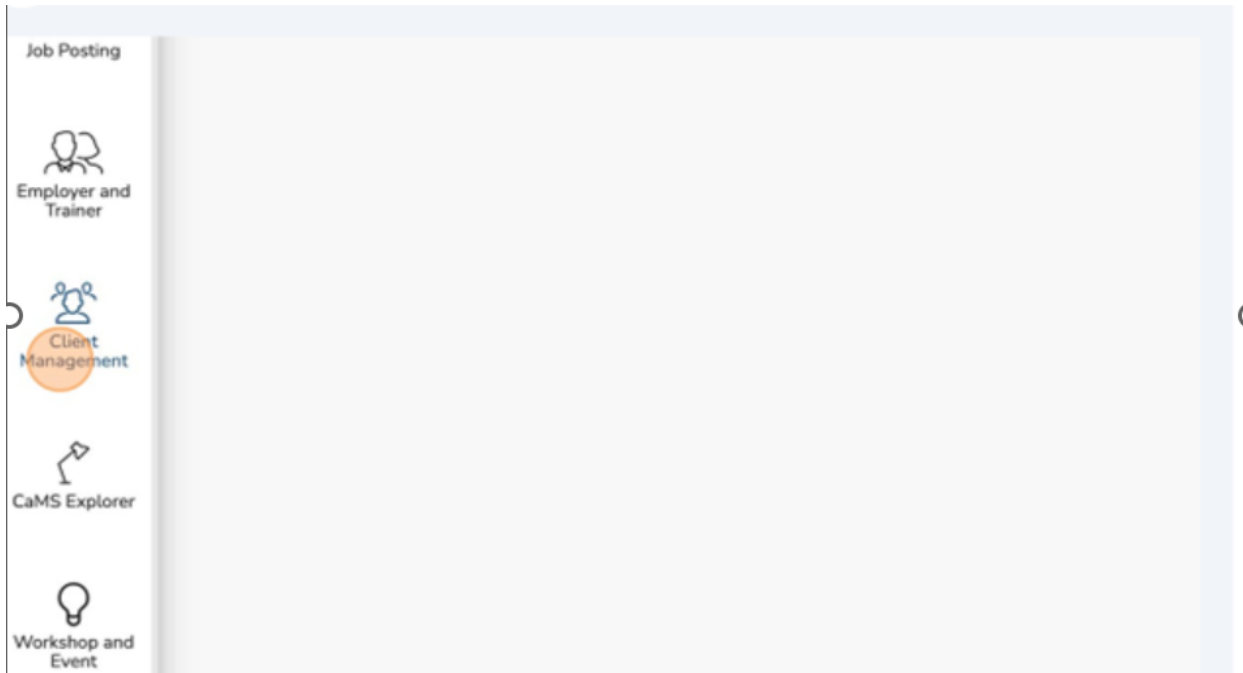


After the Profiles are merged the EAP must be merged. To merge the EAP, complete the steps under merging service plans in the next section.

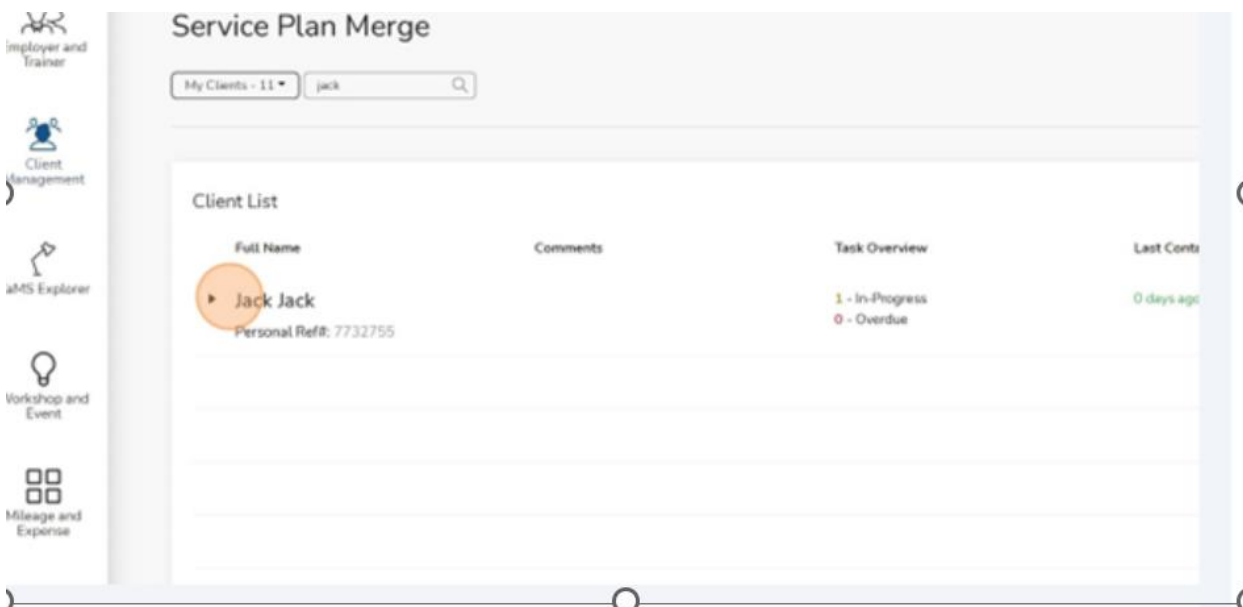
## (26) Admin Tools - Merging Service Plans

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

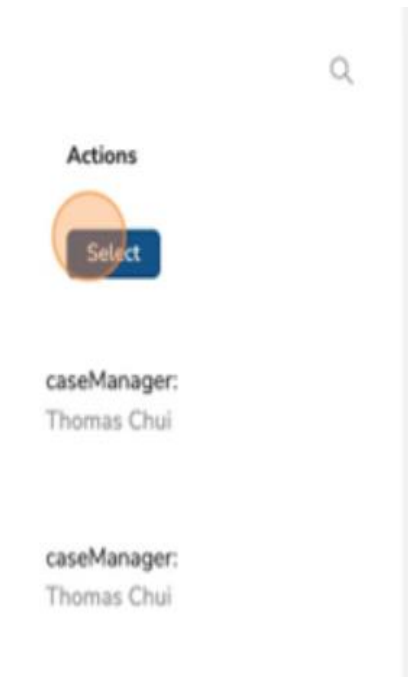
1. Click "Client Management."



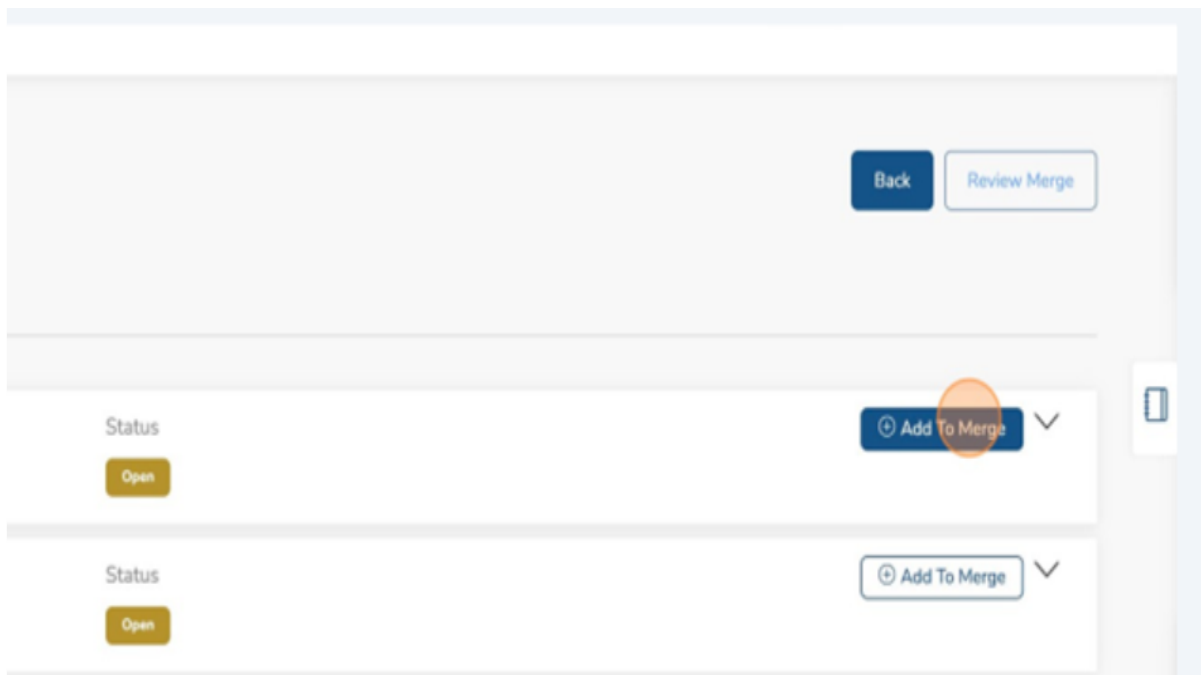
2. Enter the client that has the service plan to be merged.



3. Click "Select."

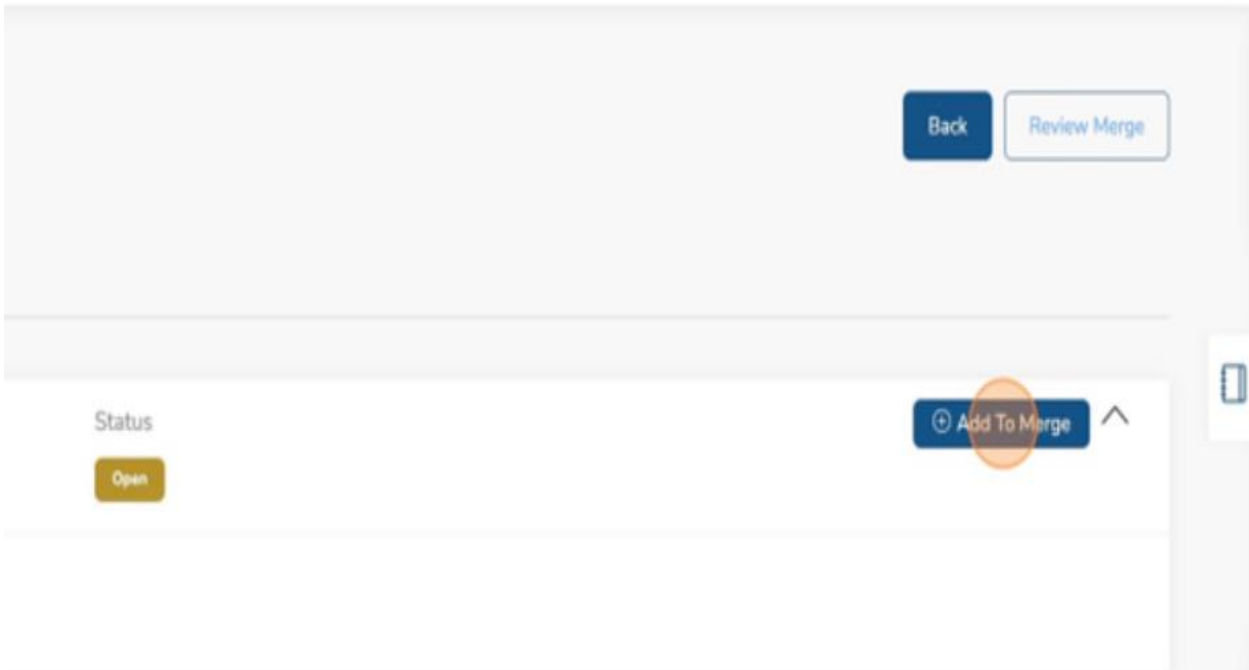


4. Click "Add to Merge" for the first service plan you want to merge.

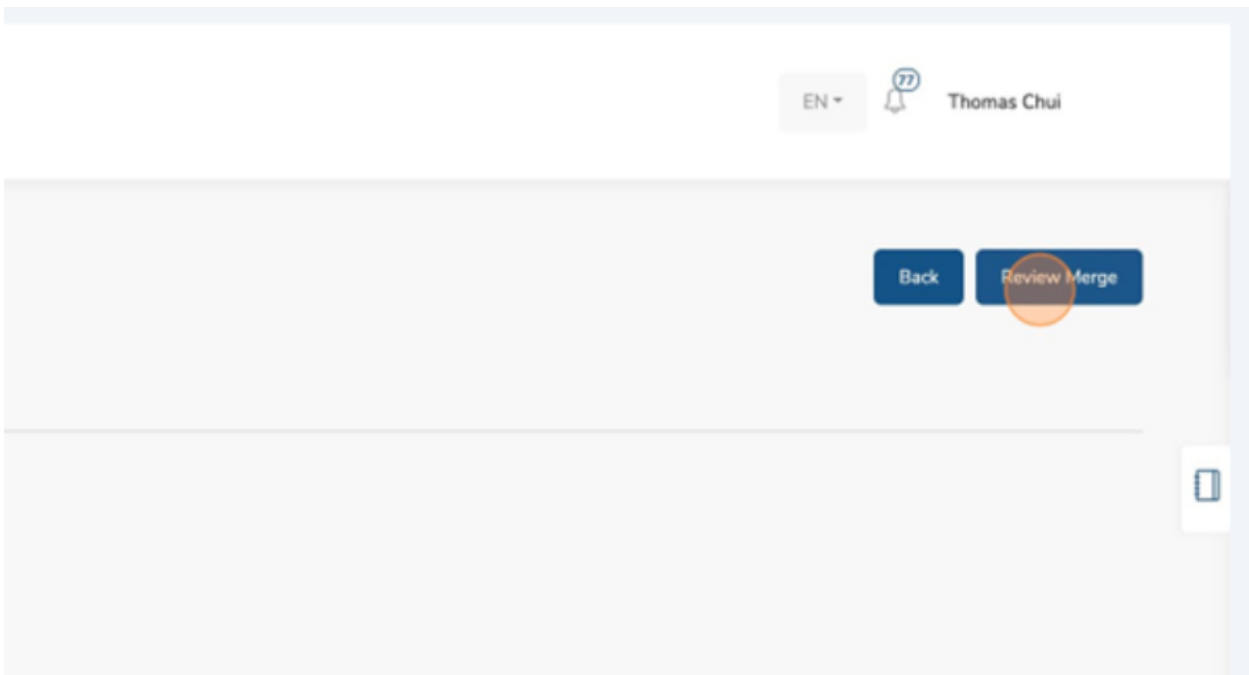




5. Click “Add to Merge” for the second service plan you want to merge.

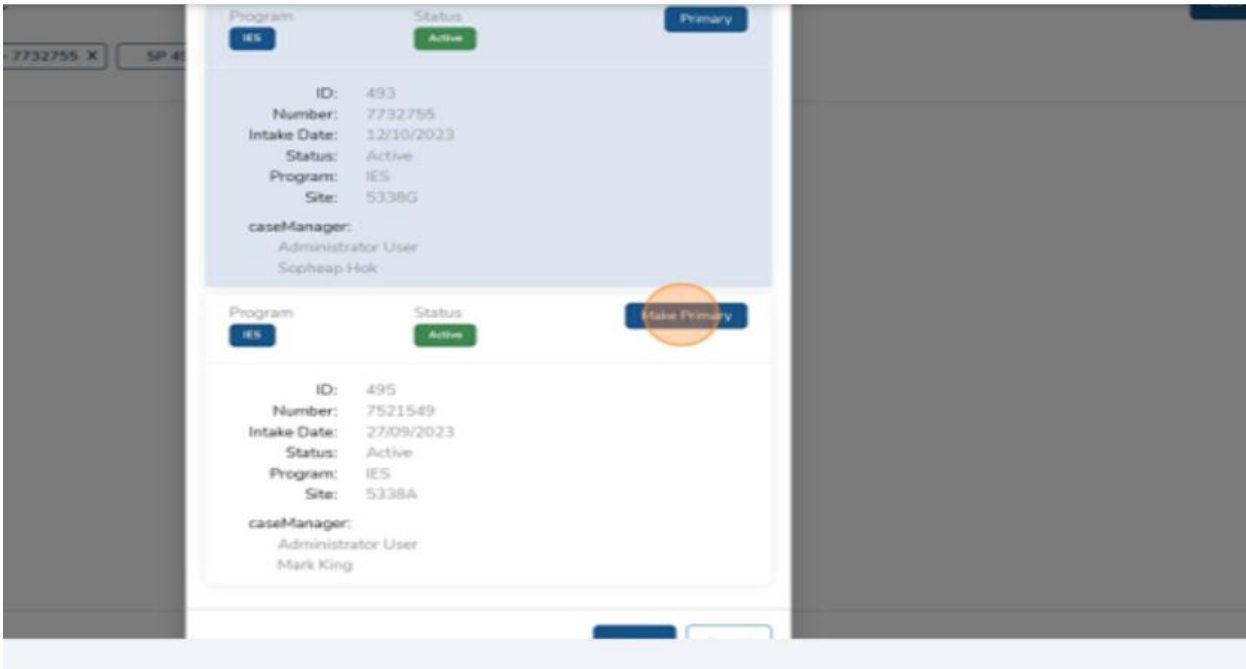


6. Click “Review Merge.”

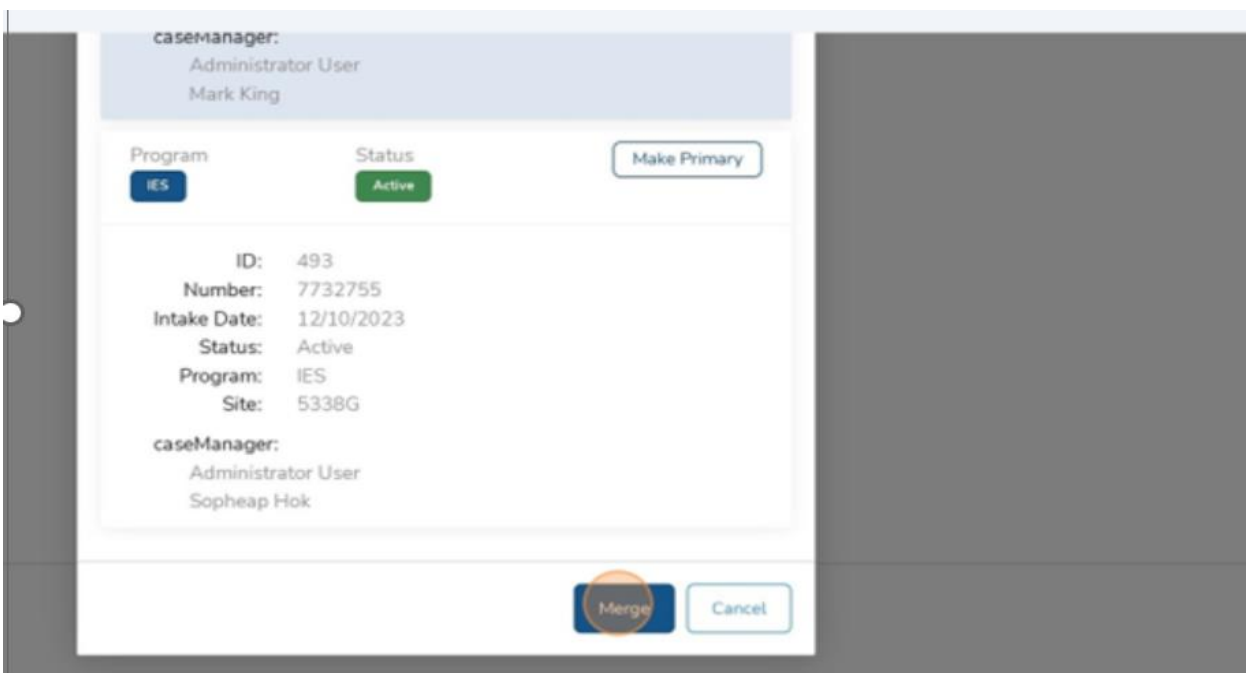


- Alert! Choosing the "Primary" service plan will set this as the Primary Service Plan. All other service plans involved in this merge will be consolidated into the primary service plan.

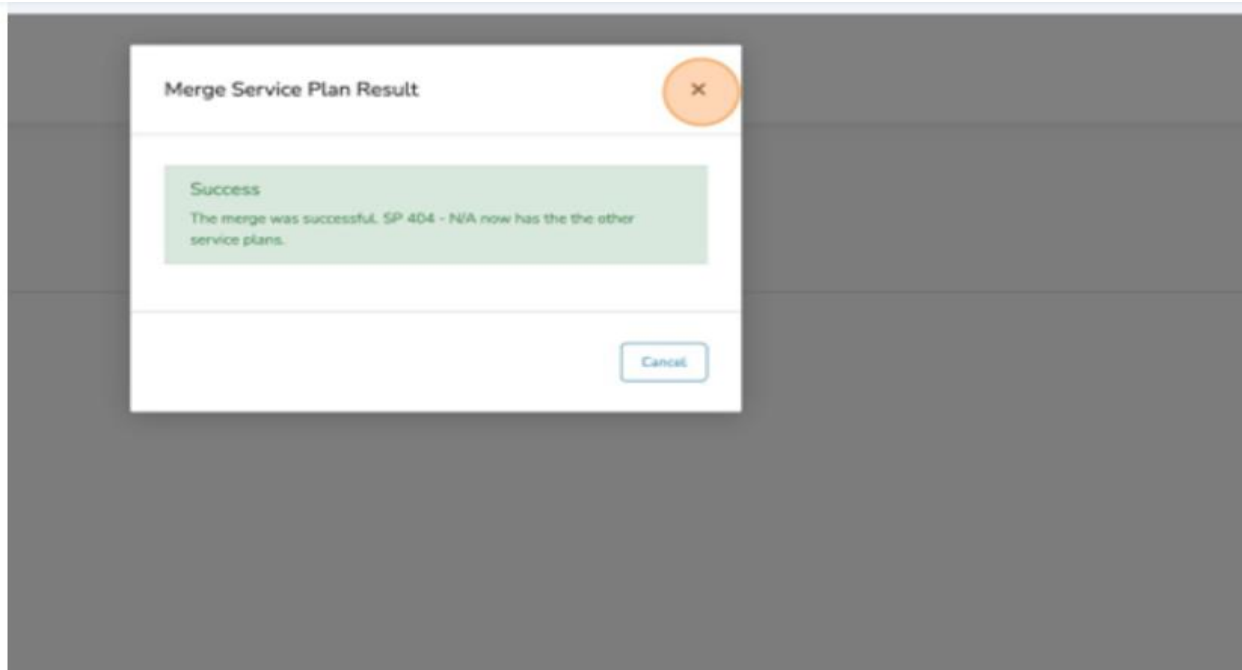
7. Click "Make Primary."



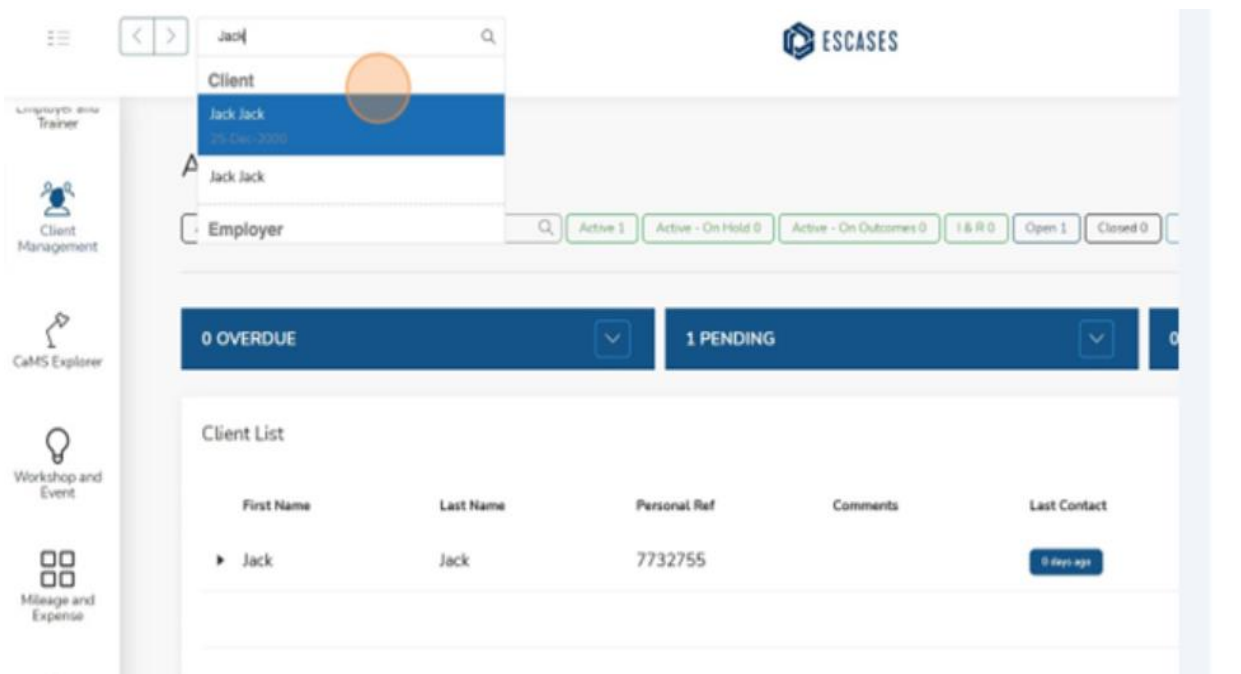
8. Click "Merge."



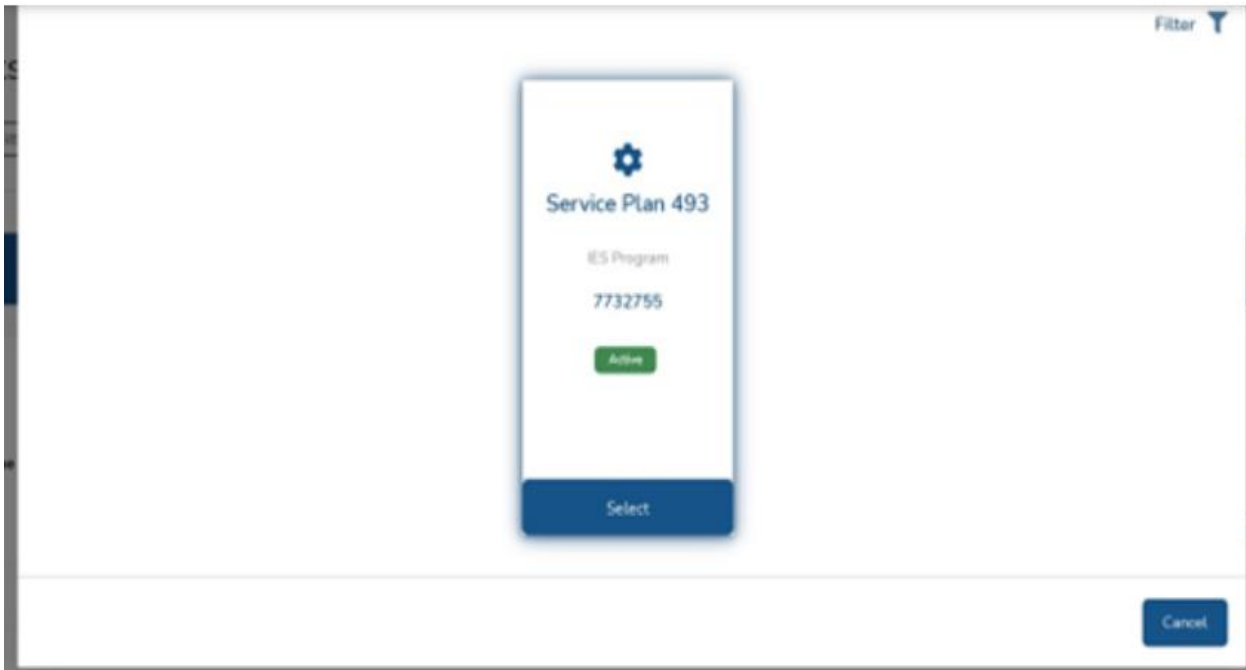
9. Click on the "X" to close.



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



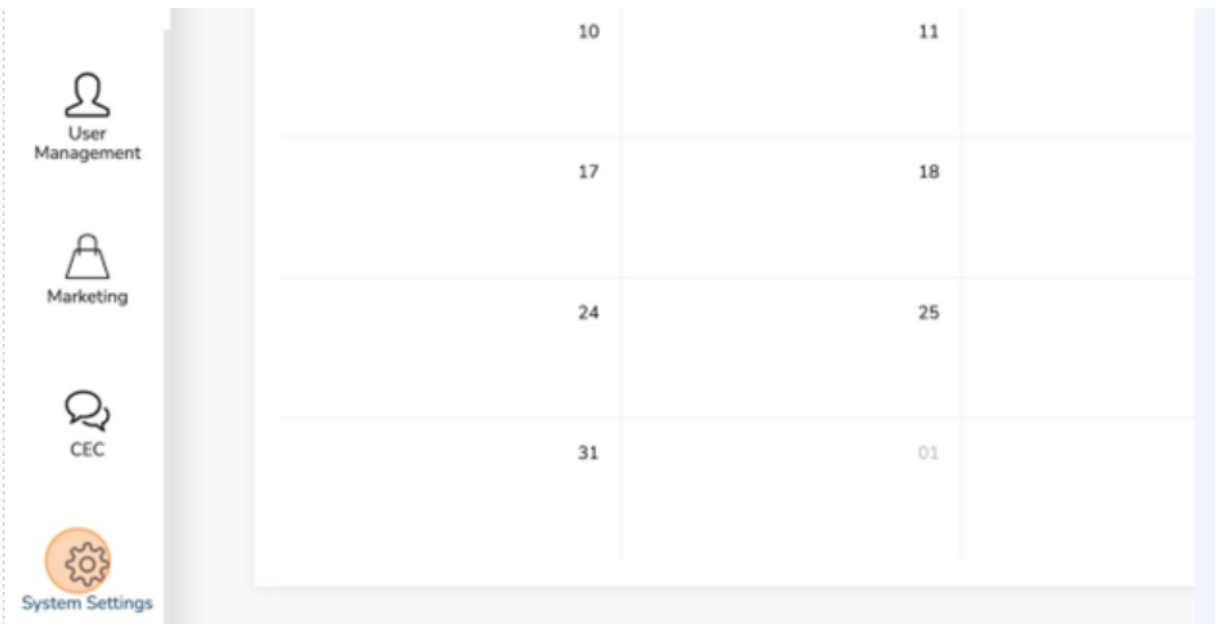
You have successfully merged service plans.



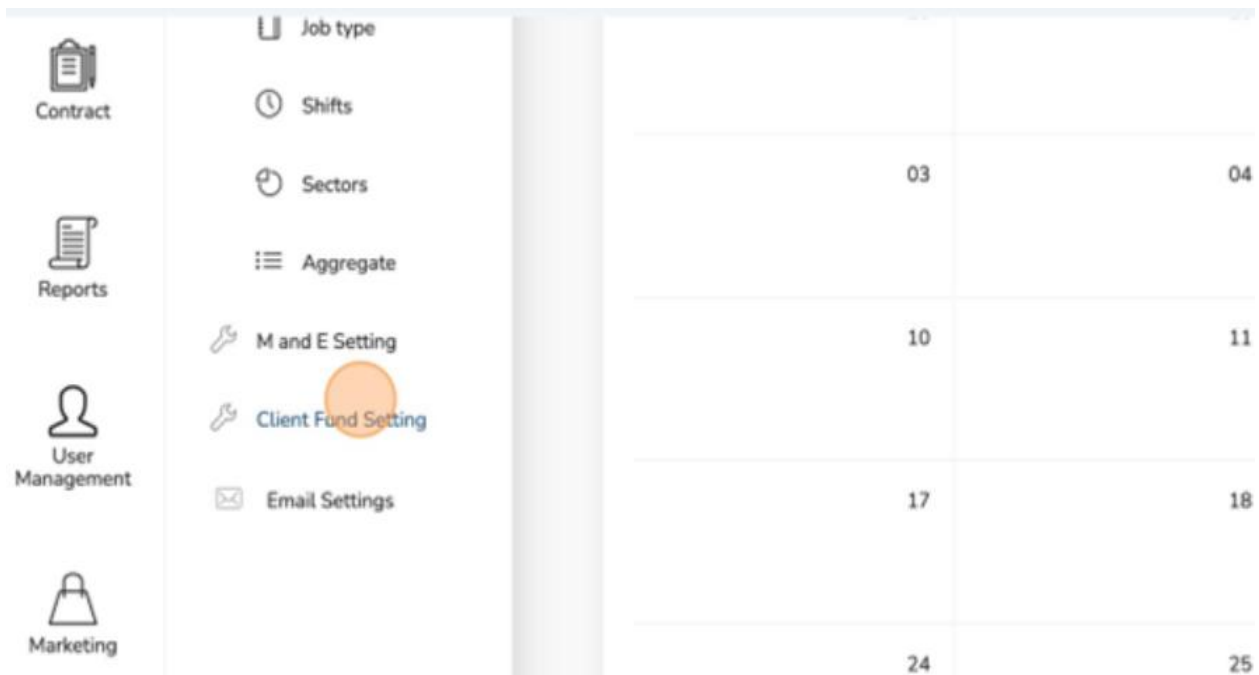
## (27) Admin Tools - Client Fund Settings

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

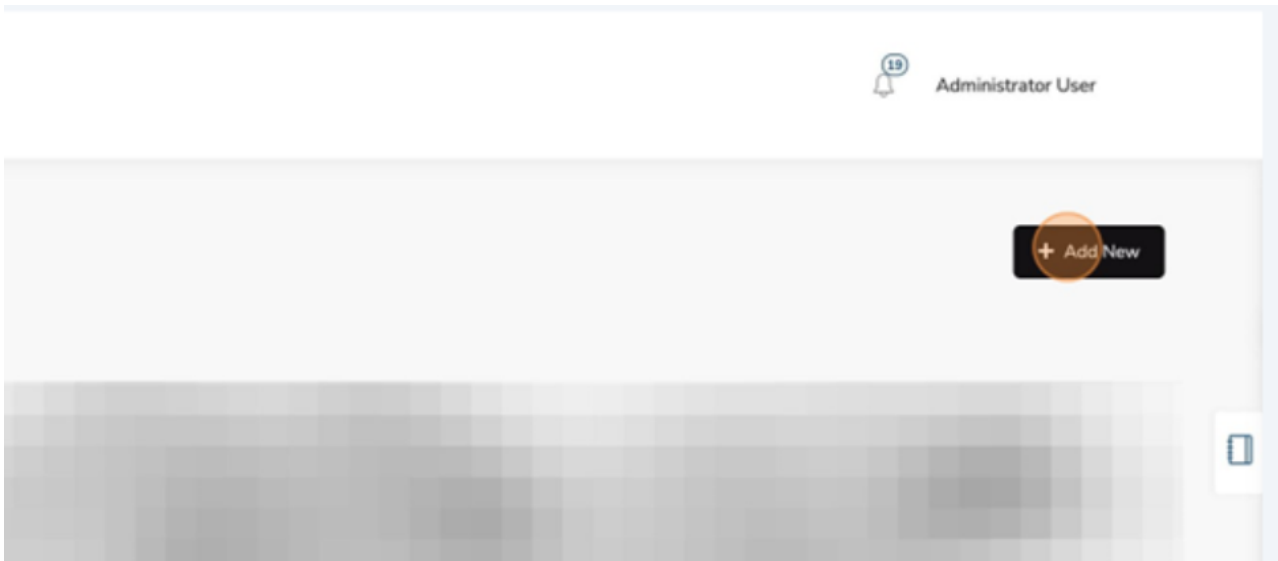
1. Click "System Settings."



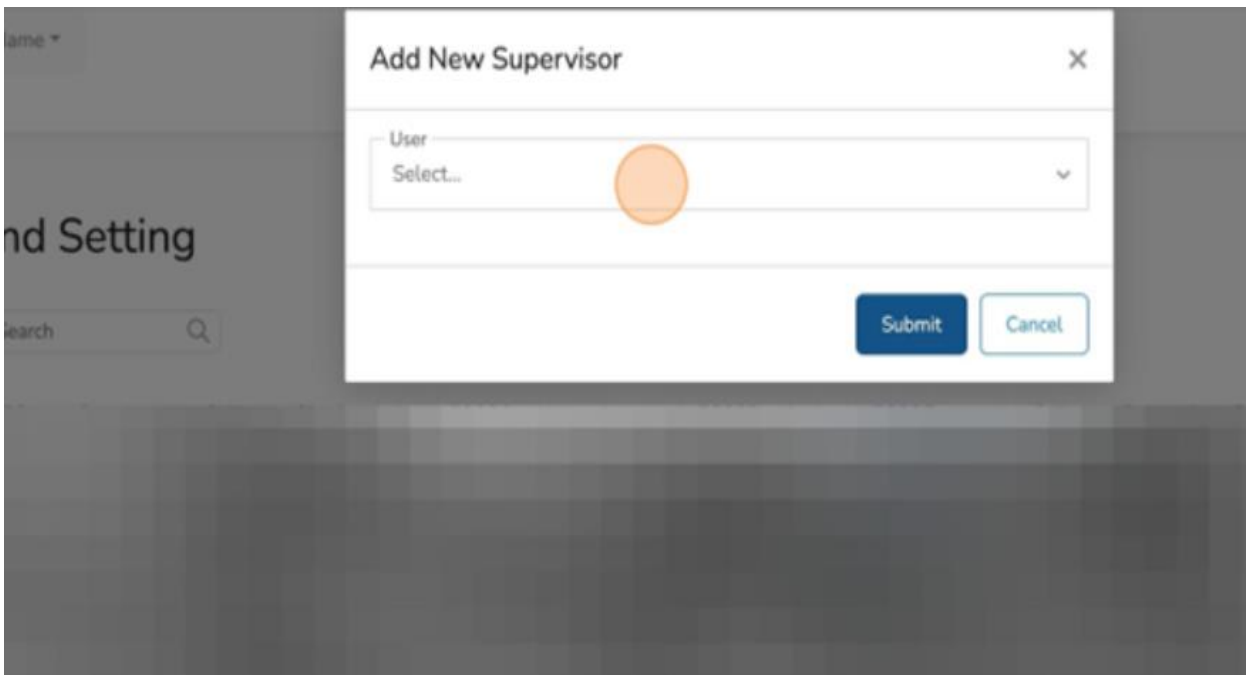
2. Click "Client Fund Settings."



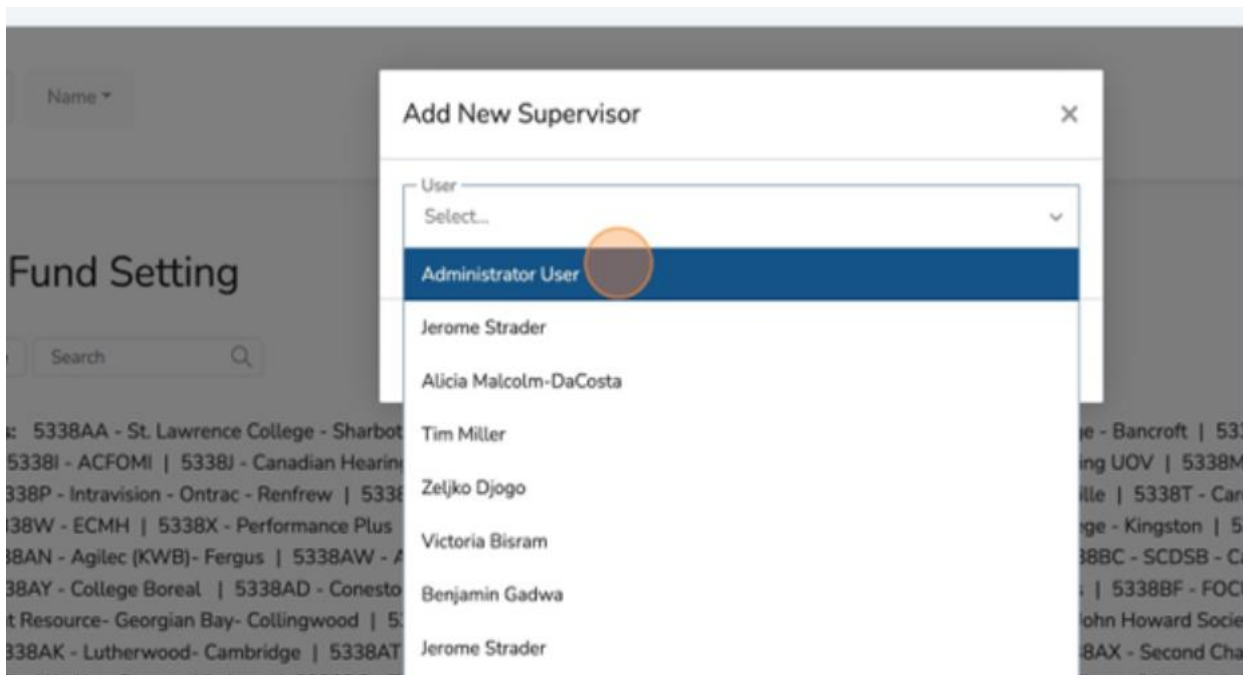
3. Click “Add new.”



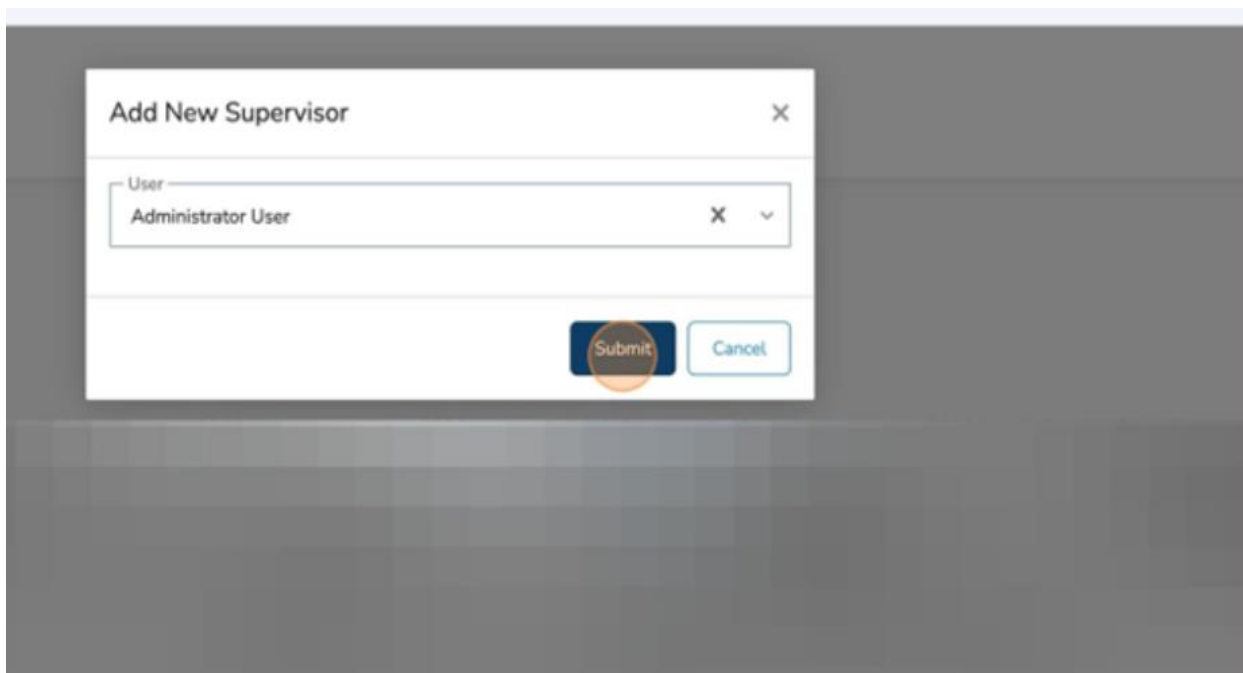
4. Click the “User” field.



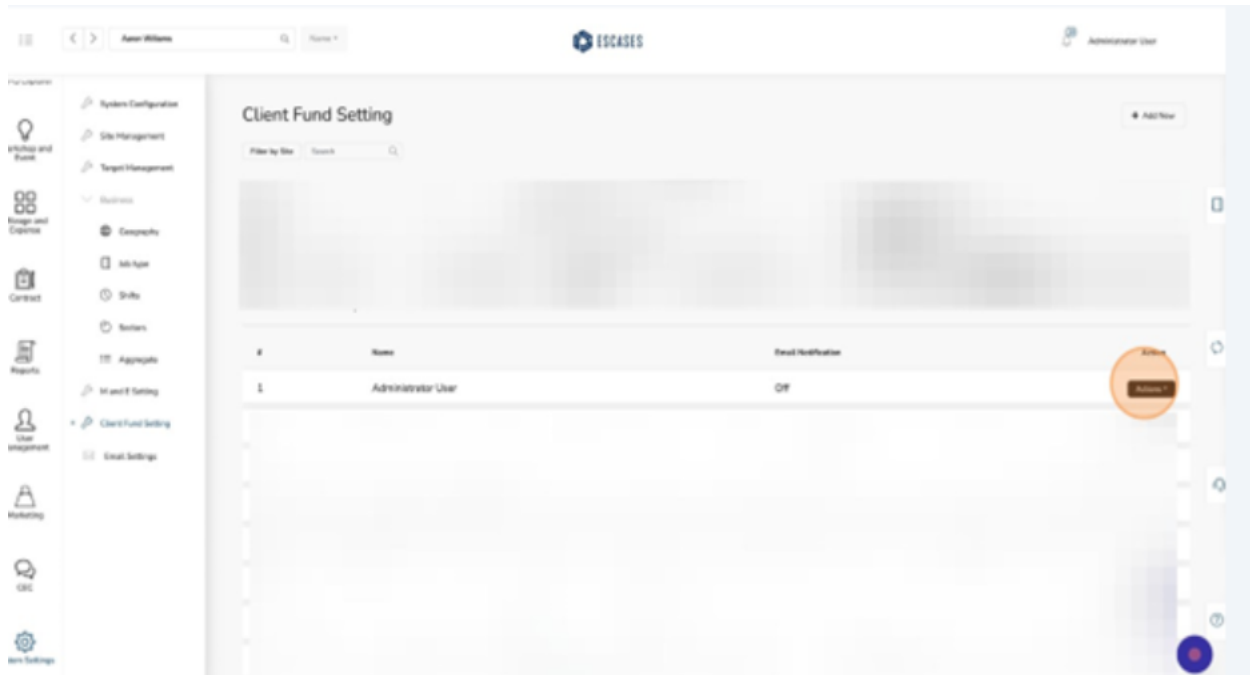
1. Select the appropriate user to add.



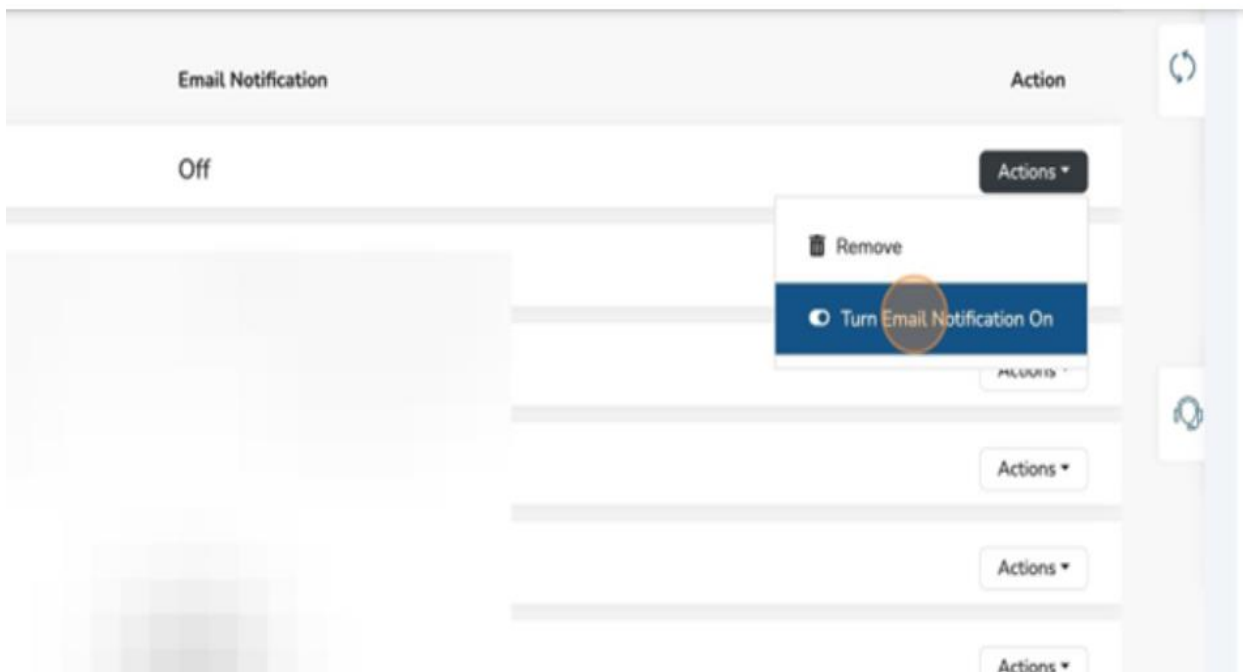
2. Click "Submit."



3. Click "Actions."



4. Click "Turn Email Notification On."





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

