



London Regional Employment Services

ESCases TRAINING GUIDE


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 Note: - icon denoting new content

(1) CaMS

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

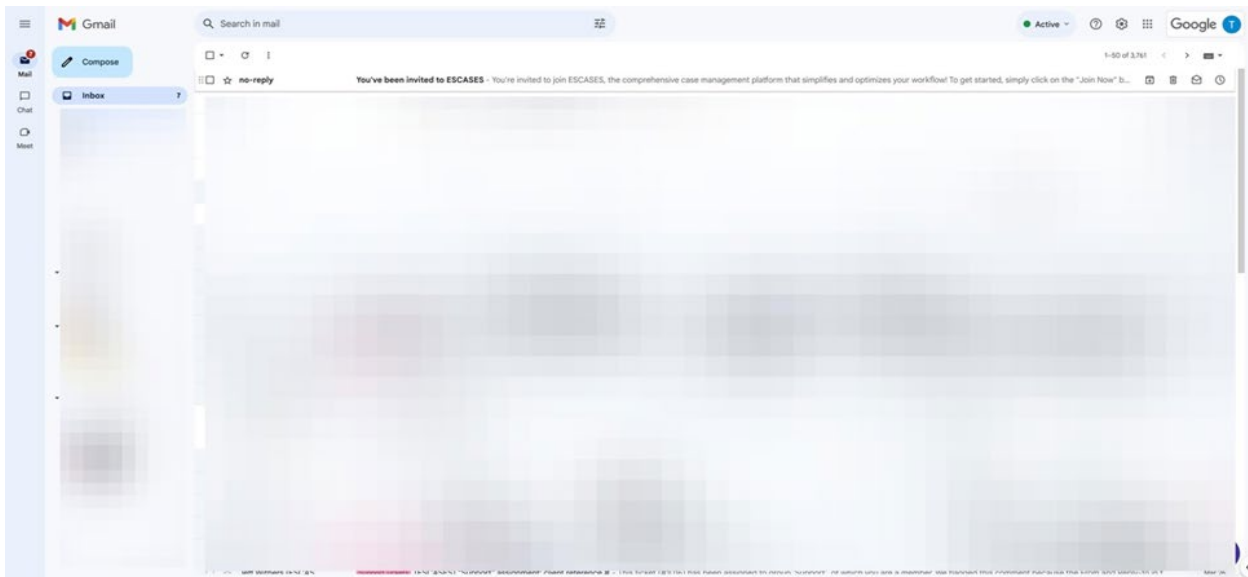
(2) Accessing ESCases


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 button labeled "EN". The main content area features the ESCASES logo and a "Register" heading. Below the heading are several input fields: "Activation Code" (containing a long alphanumeric string), "First Name" (with an orange circle over the field), "Last Name", "User Name" (containing "test@escases.ca"), and "Email" (containing "test@escases.ca"). At the bottom, there is a link "Already have an account? Sign In!" and a blue "REGISTER" button.

3. Enter your "First Name" field.

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

- ✚ If the information in the username field is changed, please review to confirm the username and the spelling that is selected. The username cannot be changed after registering for ESCases access.

4. Click the “Last Name” field.

The screenshot shows a registration form titled "Register". The 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). At the bottom, there is a link "Already have an account? Sign In!" and a blue "REGISTER" button.

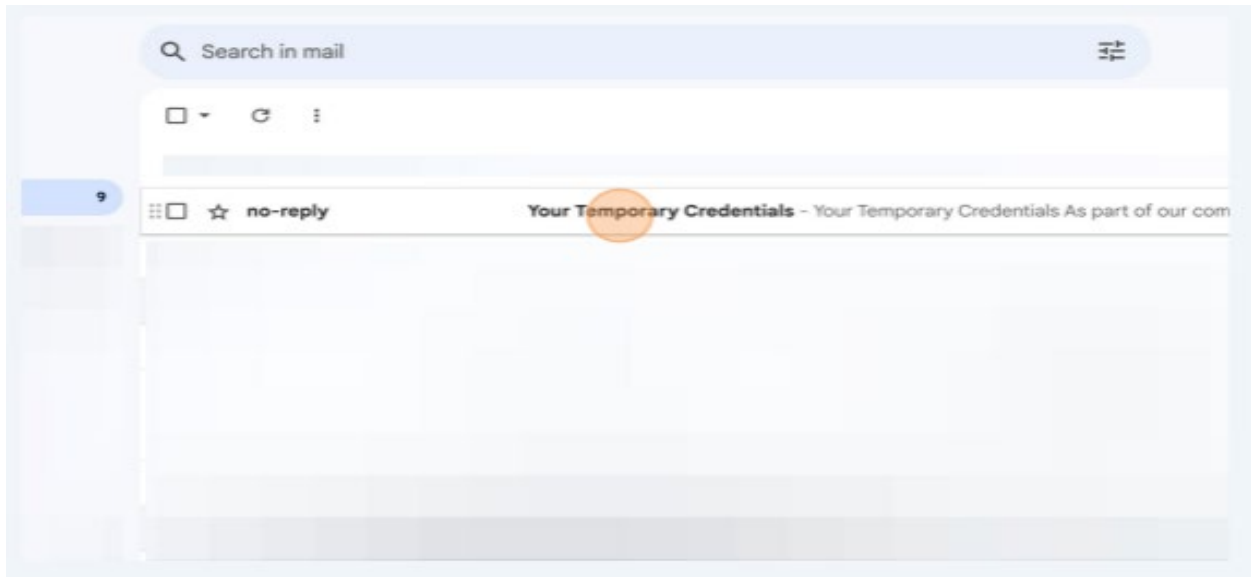
5. Enter your last name.

6. Click “Register.”

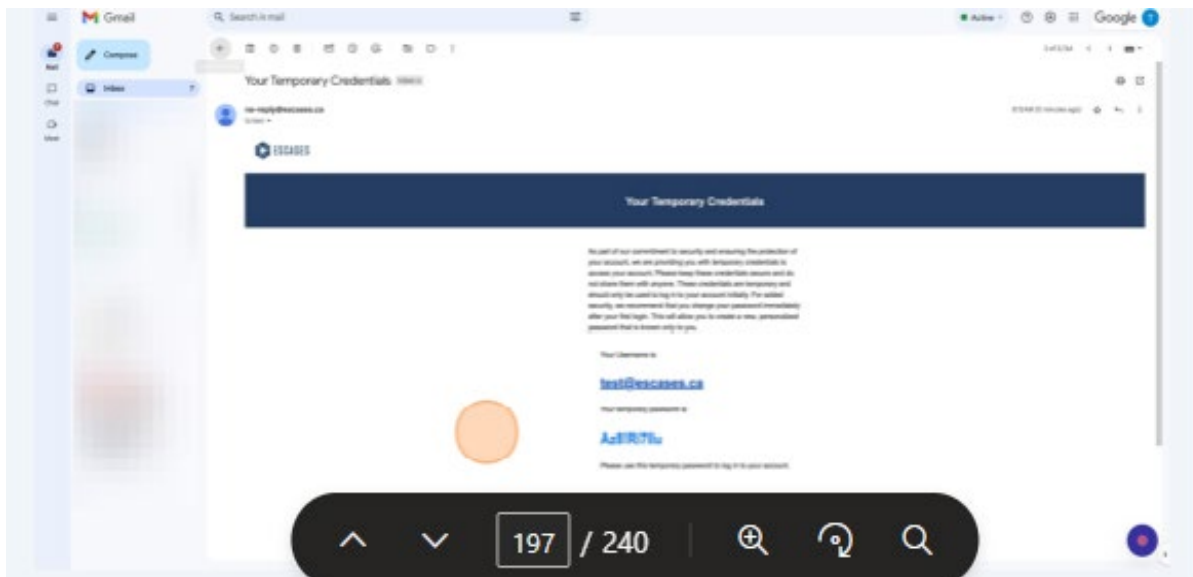
This is a close-up of the bottom part of the registration form. The "REGISTER" button is highlighted with an orange circle. The form fields contain the following text: "ne", "ne", "cases.ca", and "cases.ca". Below the fields is the text "ve an account? Sign In!".

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

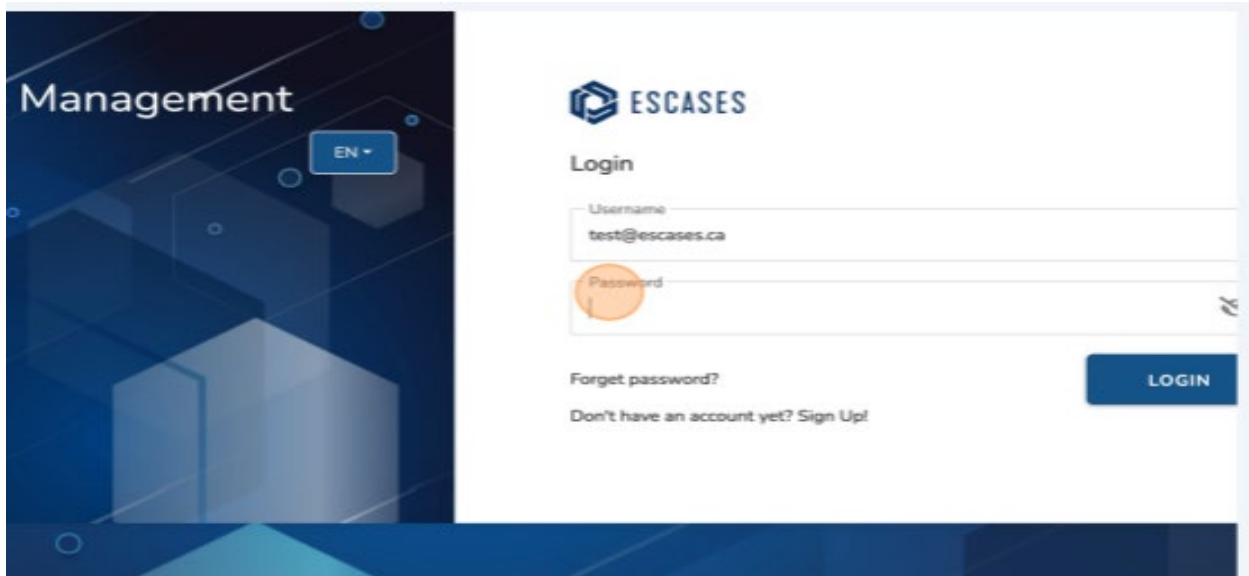
7. Click the email with your temporary credentials.



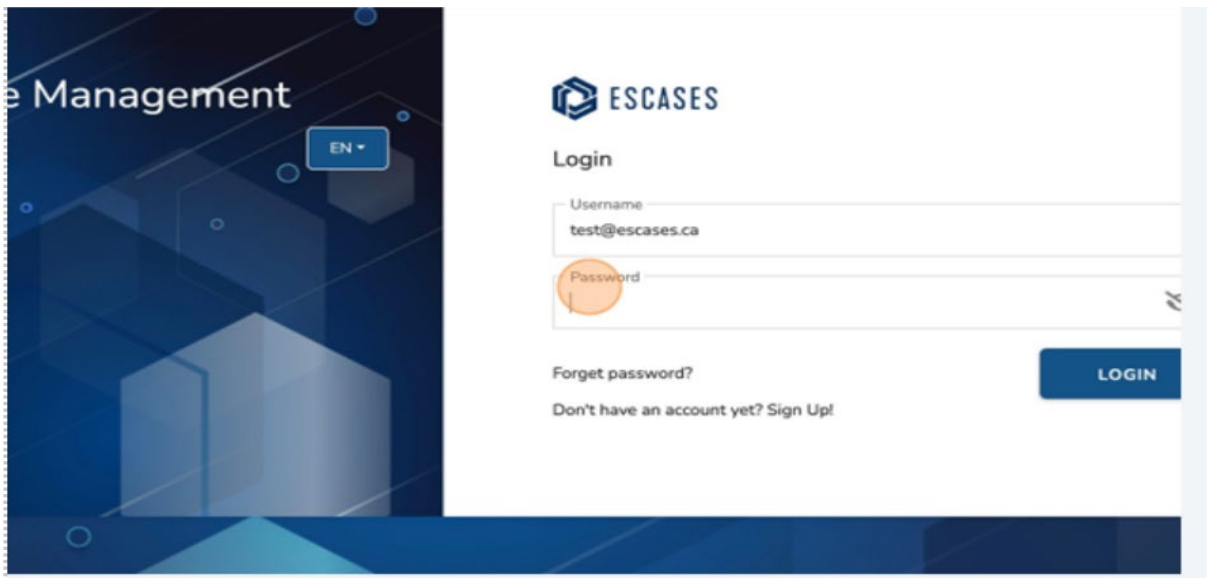
8. Copy your temporary Password.



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

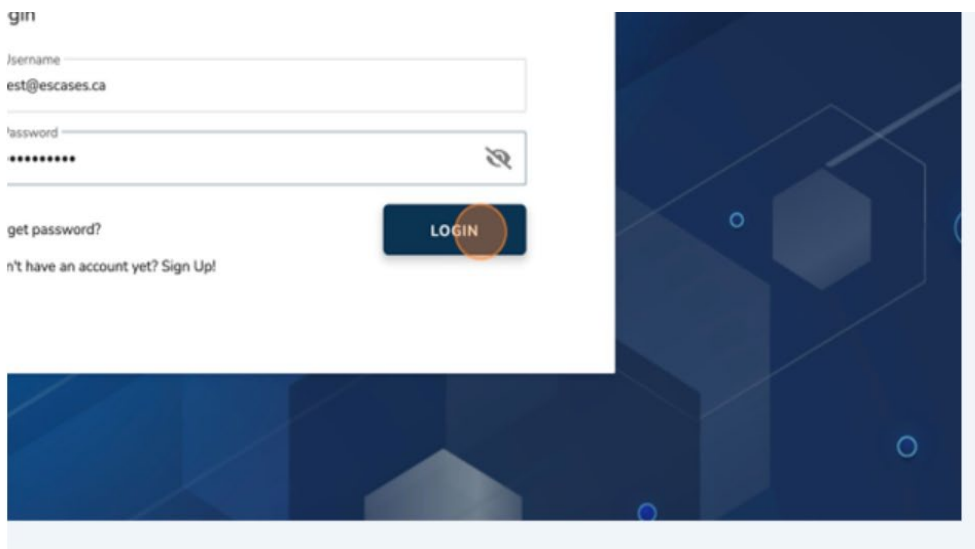


10. Click “Login.”

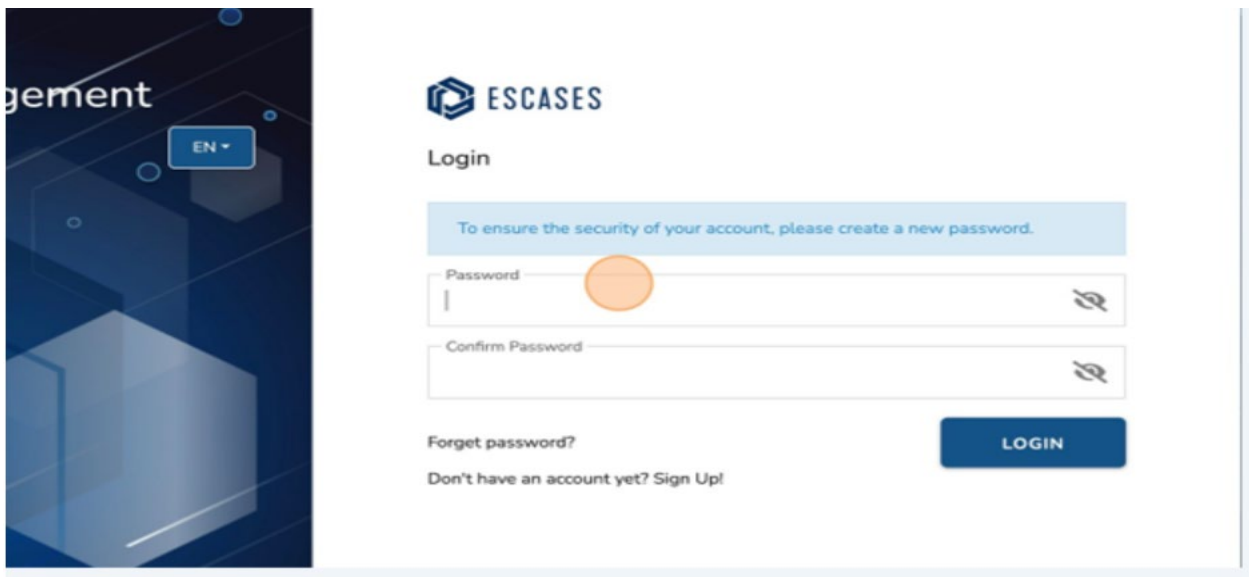


11. Click the email with the subject “Your temporary credentials.”

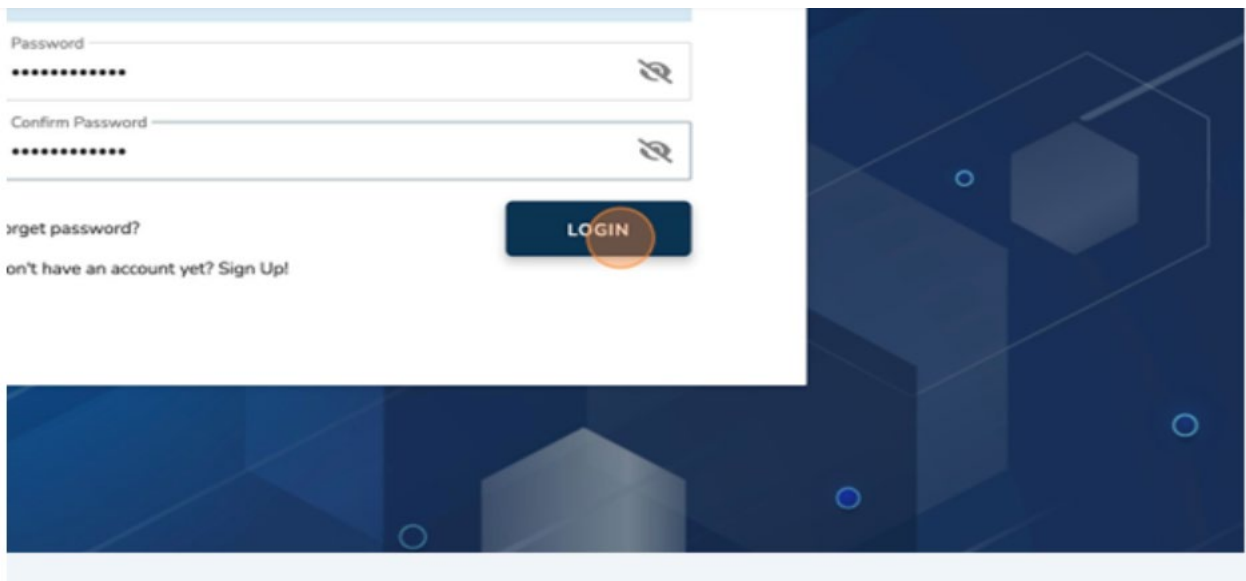
12. Click “Login.”



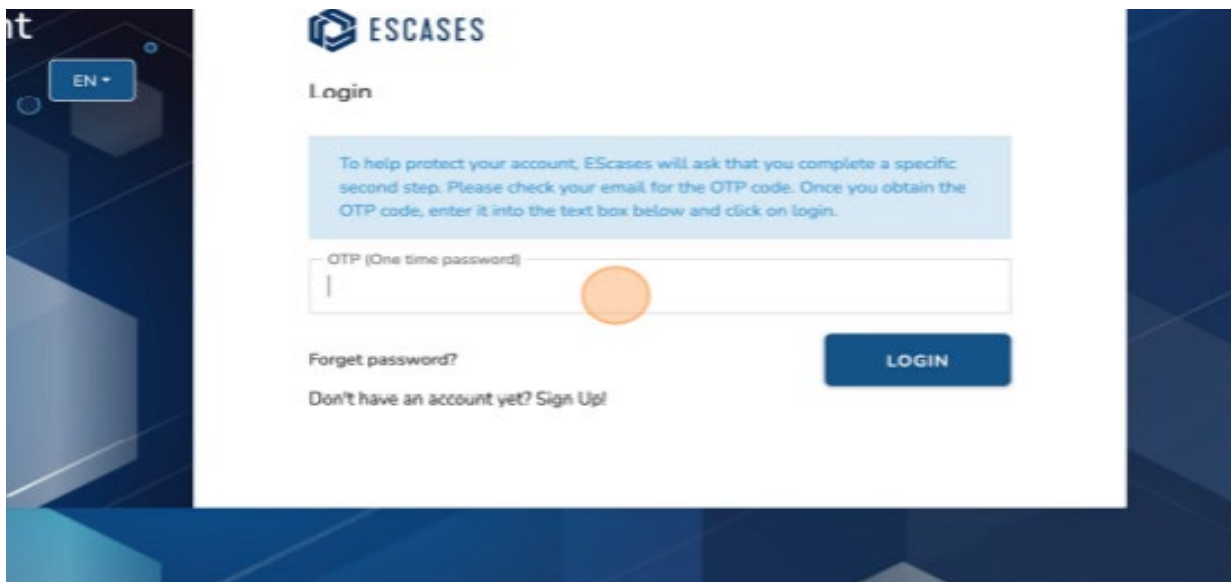
13. Enter a new password in the “Password” and “Confirm Password” fields.



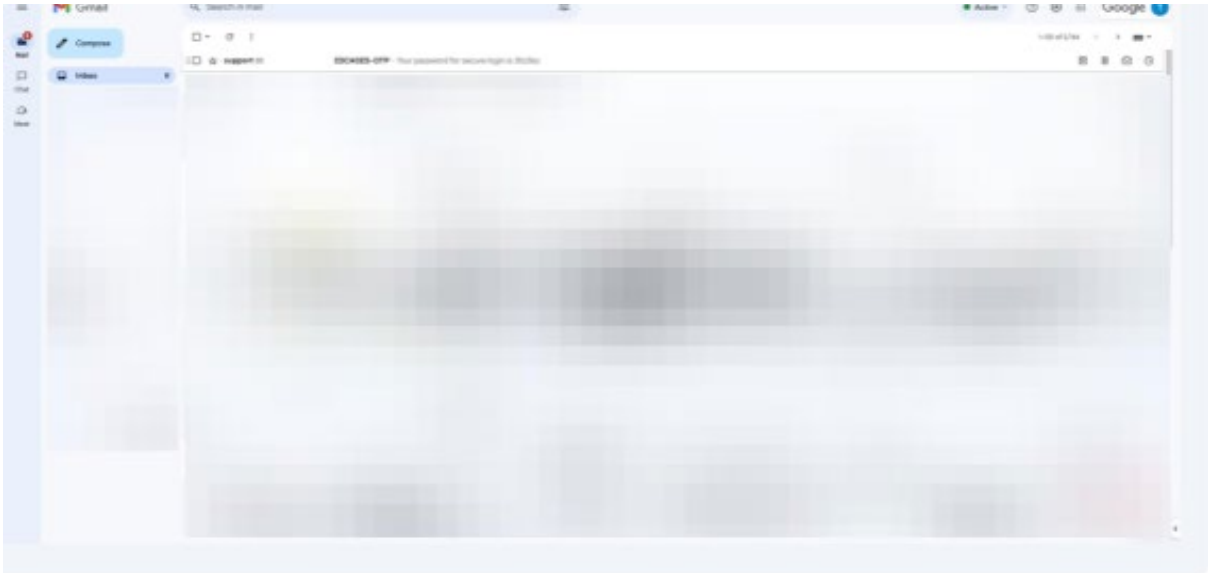
14. Click "Login."



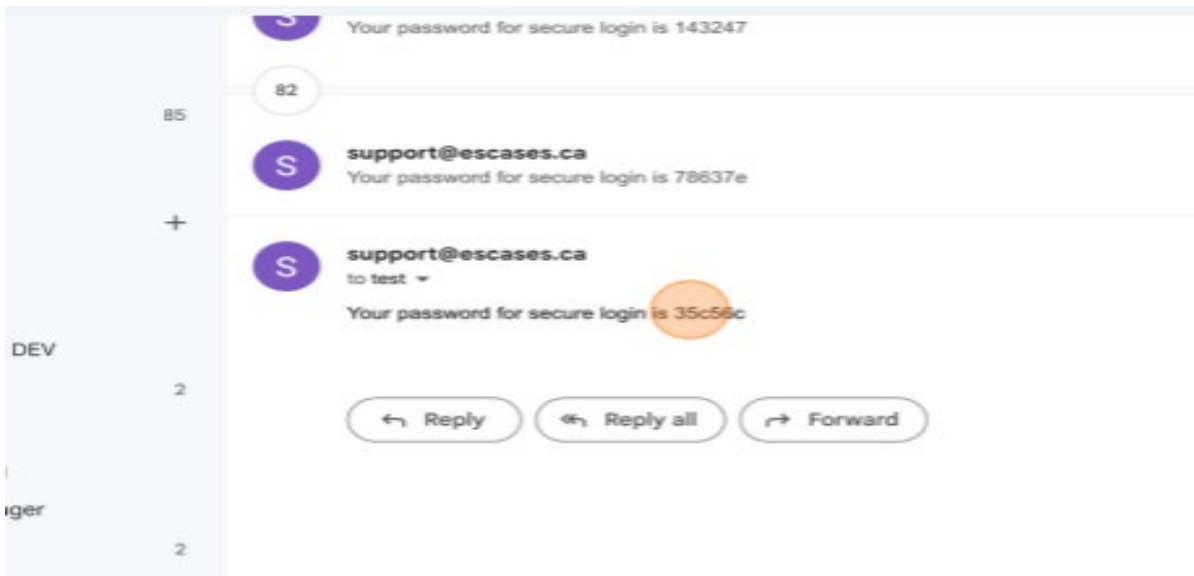
You will be asked for your OTP-One Time password sent to your email.



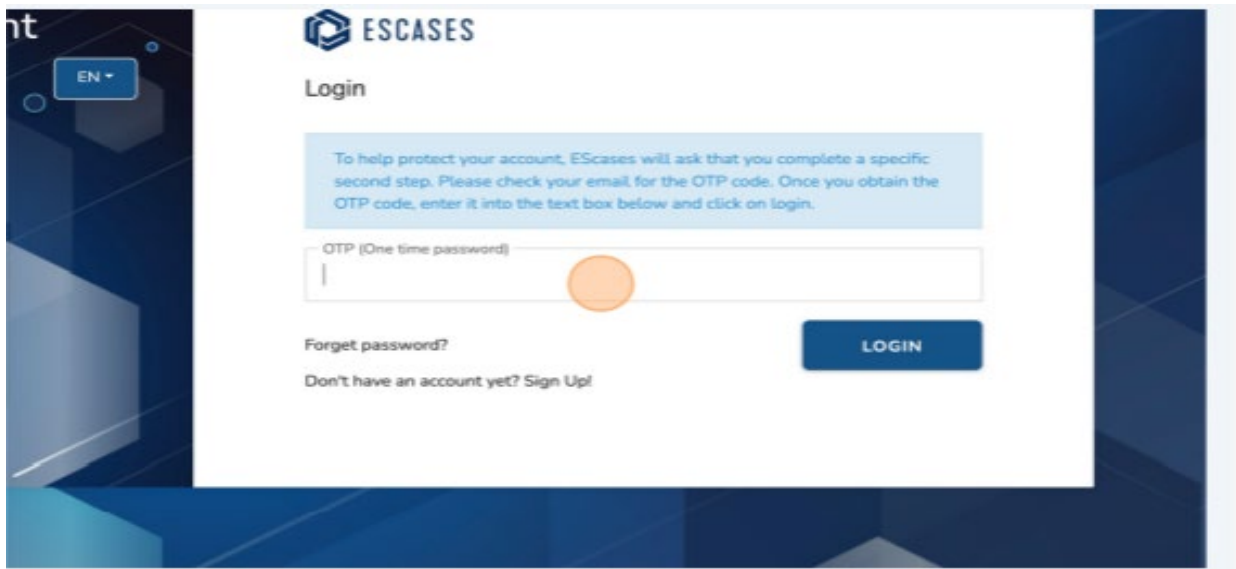
15. Click on the OTP email with the subject "ESCASES-OTP."



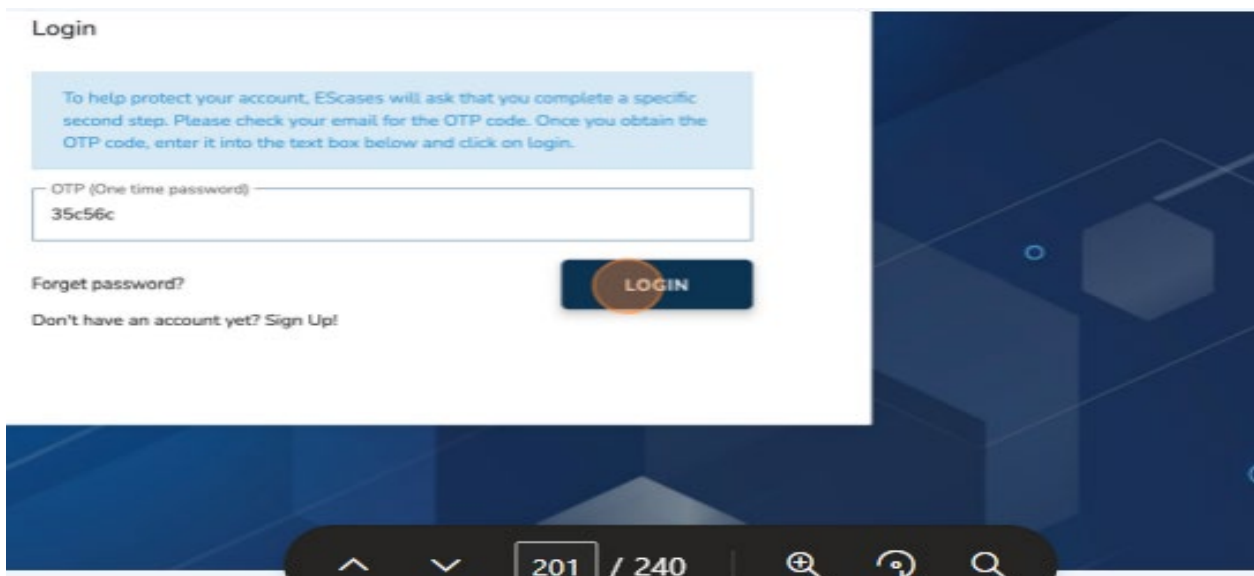
16. Copy the OTP.



17. Paste the OTP.



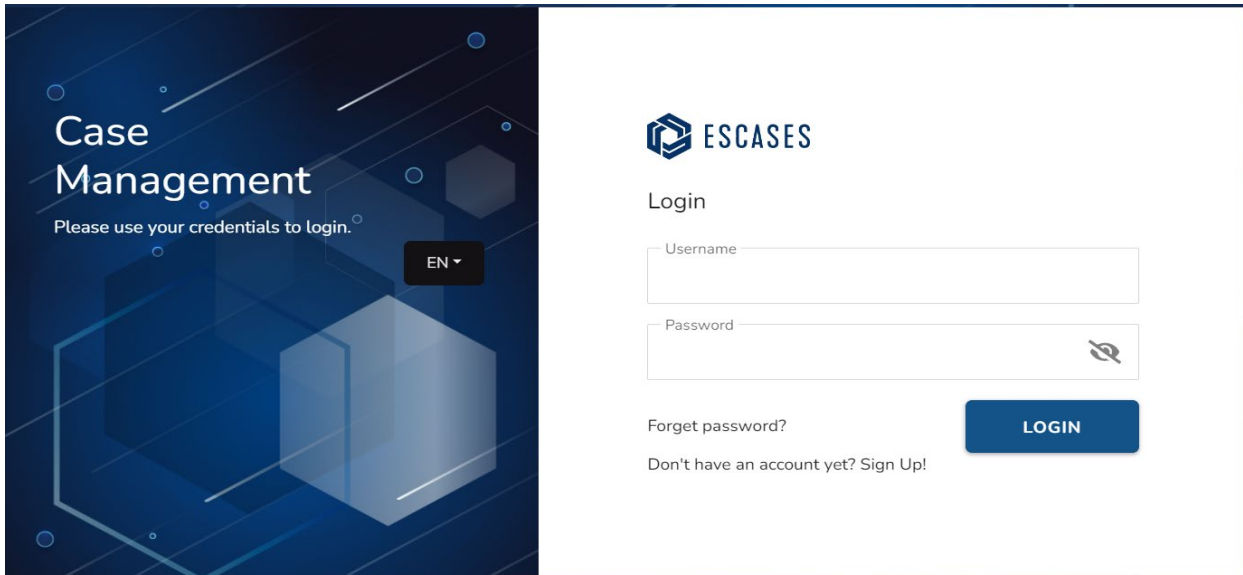
18. Click "Login."



ESCases First Login

To Log into ESCases, complete the following steps:

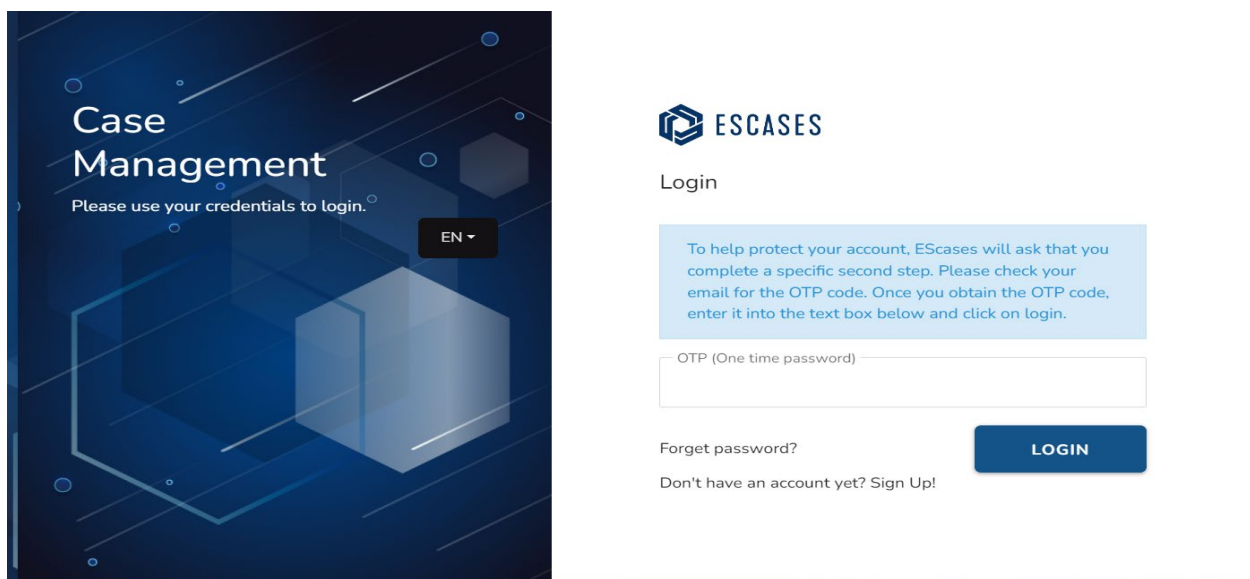
1. Enter Your Username i.e., the email address that was used to create the ESCases account.
2. Enter your Password.



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". 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 Reference Number

Preconditions: 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' page in the 'CASE MANAGEMENT SYSTEM - SSM MANAGER APPLICATION'. The interface includes a top navigation bar with 'Workspace', 'Cases and Outcomes', 'Tasks', and 'Calendar'. A left sidebar contains 'Shortcuts' and 'Participant' sections. The main area has search 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'. 'Search' and 'Reset' buttons are present. Below the search area is a 'Search Results' table with columns: Reference Number, First Name, Last Name, City, Date of Birth, APPR Client Party ID, and SAMS Member ID. The 'Reference Number' column header is circled in orange.

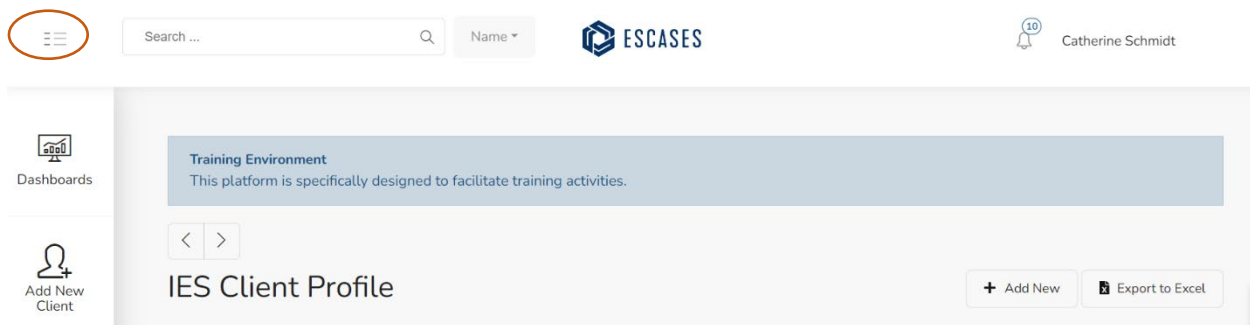
Reference Number	First Name	Last Name	City	Date of Birth	APPR Client Party ID	SAMS Member ID
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(4) CAMS Explorer

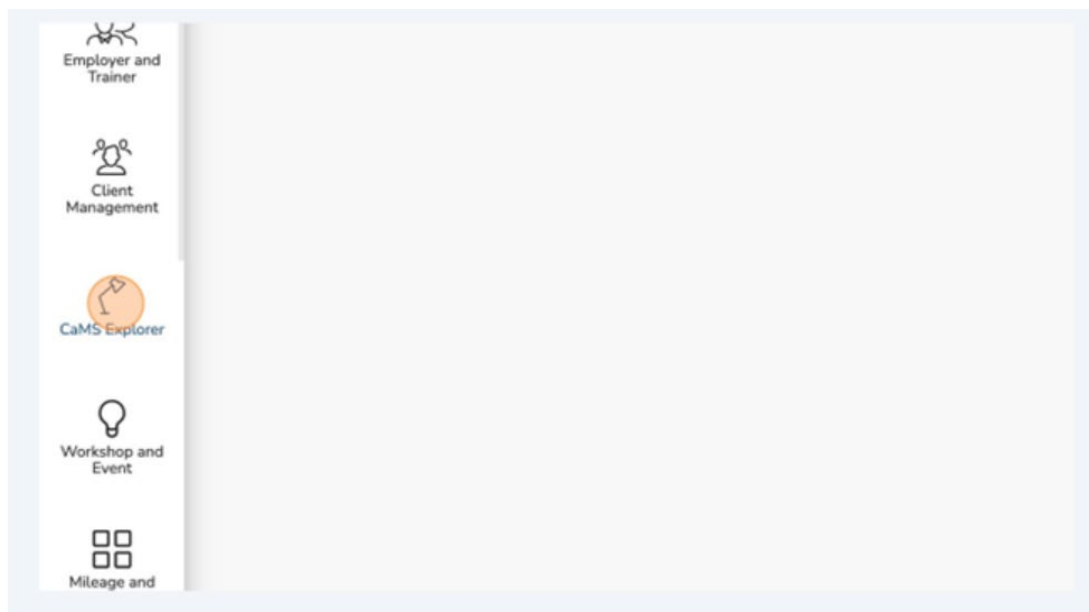
CaMS Explorer is one of the primary tools to help users what is happening in the CaMS environment while also working within ESCases – all without logging into CaMS!

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



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

CaMS Explorer

Client Employer

Select catchments
4614 | Catchment 1 x

7738404

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.

The screenshot displays the CaMS Explorer interface for a client profile. The client's information is as follows:

Client Reference Number	First Name	Last Name	Date of Birth
7731743	Fraser	Crane	01/01/1979

Client Summary

Field Name	Last Name	Initials	Mother Birth Last Name
Fraser	Crane	Fraser	N/A
Title	Middle Name	Suffix	Birth Last Name
N/A		N/A	N/A
SAMS Member ID			

Self Identification

<input type="checkbox"/> Deaf	<input type="checkbox"/> Deaf Blind	<input type="checkbox"/> First Nations	<input type="checkbox"/> Francophone
<input type="checkbox"/> Inuit	<input type="checkbox"/> Mute	<input type="checkbox"/> NewComer	<input type="checkbox"/> ODDP
<input type="checkbox"/> Person With Disability	<input type="checkbox"/> Racialized Person	<input type="checkbox"/> Youth	

Client Detail

Identity As	Other Description	Regn
Male	Immigrated To Canada	2021
Preferred Language	Invited To Canada	Date
English	No	1875
Country of Birth	Date Arrived in Canada	Perk
Canada	N/A	N/A
SN	Latest CA Client Stream	Scan
339040224	Stream C	No 5
Is Full Eligible		
Yes		

Contact

Address

Address Type	Suite	Street 1	Street 2	Province	City	State
Primary Mailing	N/A	91234 Fake St.	N/A	Ontario	Kingston	N/A
Mailing	N/A	91234 Fake St.	N/A	Ontario	Kingston	N/A

Email

Phone

Phone Number	Type
813-546-8242	Primary

Note: If the client has been linked with ESCases, the "View Profile" link will be enabled. Clicking the link will open up a duplicate tab which will take you to the client's case.

(5) Navigation

Duplicate Tabs

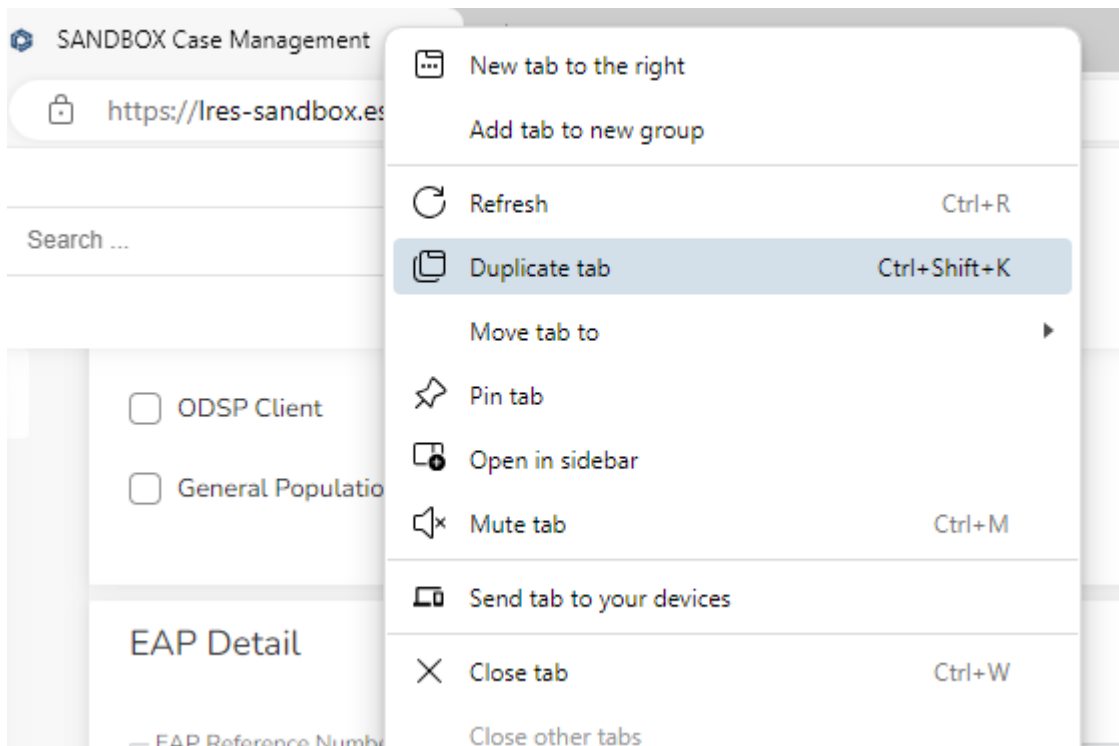
ESCases allows a user to open multiple tabs in order to continue working when ESCases is syncing with CaMS.

To duplicate a tab:

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

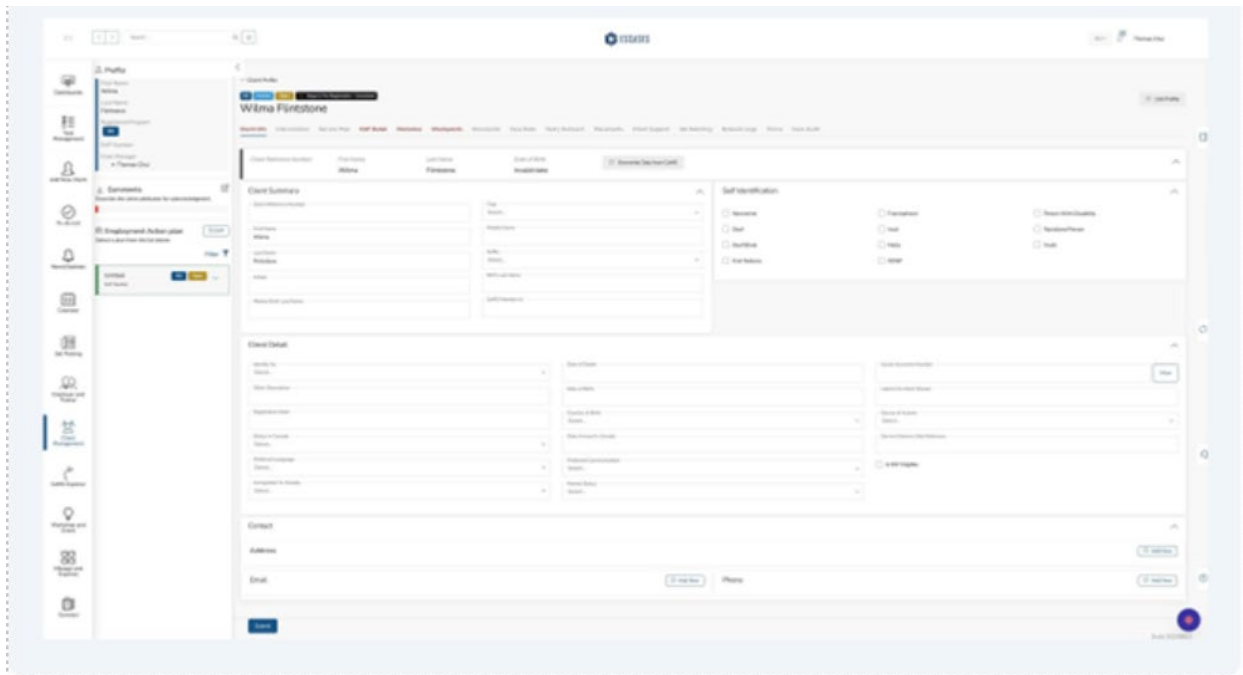
A second tab will open. Users can duplicate as many tabs as required.

- ✚ Specific actions in ESCases may open up a duplicate tab (e.g. selecting “Client Profile” in CaMS explorer).



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

Tab colour



Red tabs – sync with CaMS.

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

Grey tabs - do not sync with CaMS.

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

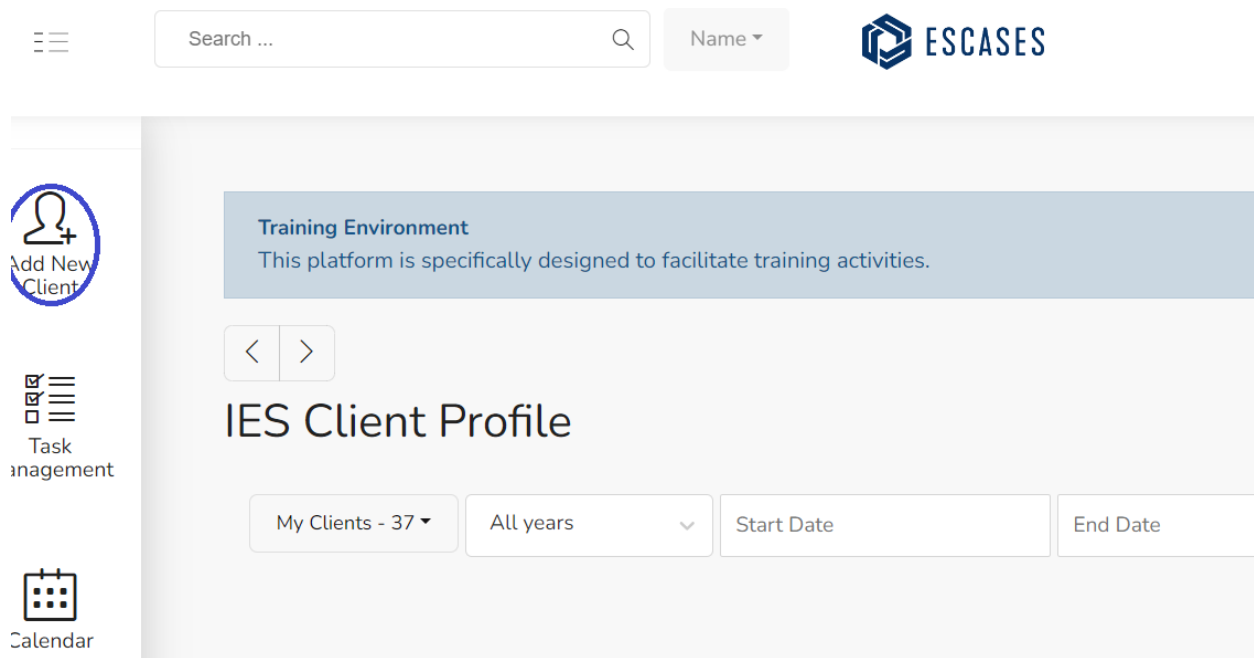
(6) Add New Client

ESCases has streamlined the process for onboarding a new client. New clients are entered into ESCases in the exact same way.

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

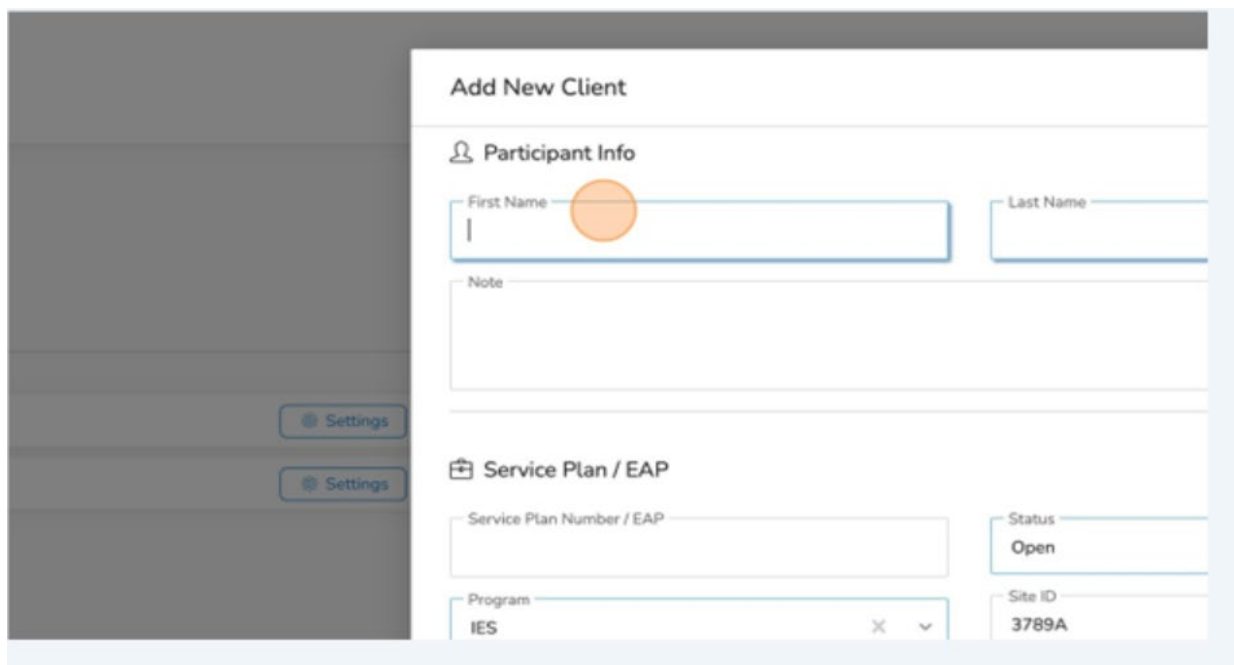
The first step is to add/register clients in ESCases. The following steps outline the process for adding a new client in ESCases:

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



The “Add New Client” page displays.

2. Click “First Name.”



3. Enter the client’s First Name.

4. 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 contains a single character 'I'. An orange circle highlights this field. Below this is a large text area. The 'Plan / EAP' section contains several fields: 'Number / EAP', 'Status' (a dropdown menu with 'Open' selected), 'Site ID' (a dropdown menu with '3789A' selected), and another dropdown menu. To the right of the form, there are two 'Settings' buttons.

5. Enter the client’s last Name.

6. Click the “Service Plan/EAP.”

The screenshot shows a 'Service Plan / EAP' form. On the left, there is a sidebar with a 'Client Last Contact' section. The main form has a 'Note' field at the top. Below it is the 'Service Plan / EAP' section. The 'Program' dropdown menu is highlighted with an orange circle and shows 'IES' as the selected option. Other fields include 'Status' (dropdown with 'Open'), 'Site ID' (dropdown with '5338AA'), 'Intake Date' (text field with '12/02/2024'), 'Case Manager' (dropdown with 'Administrator User'), and 'Employer Liaison' (dropdown with 'Select...').

7. Select "IES."

Client Last Contact

0-14 days:

Service Plan / EAP

Program: Select... (IES selected)

Status: Open

Site ID: 5338AA

Intake Date: 12/02/2024

Case Manager: Administrator User

Employer Liaison: Select...

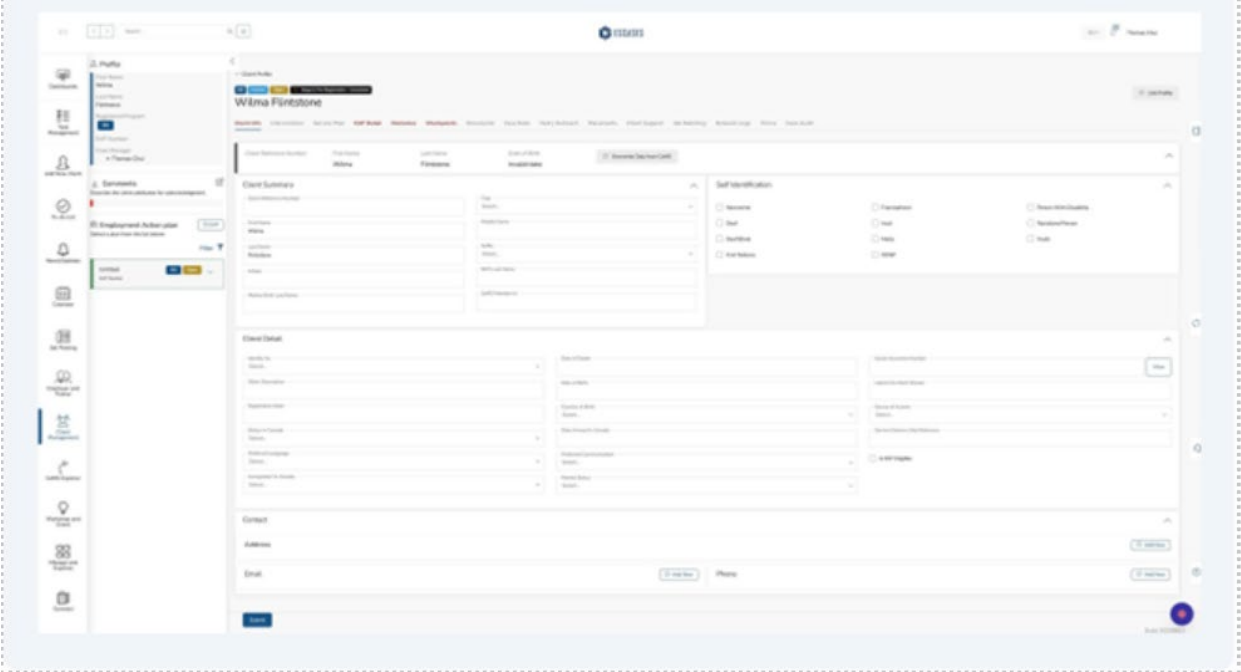
❖ Tip: Leave the "Status" option as open. The "Site ID" field can also be left with the default value as the system will auto-populate with your Site ID.

8. Select "Submit."

Submit

Cancel

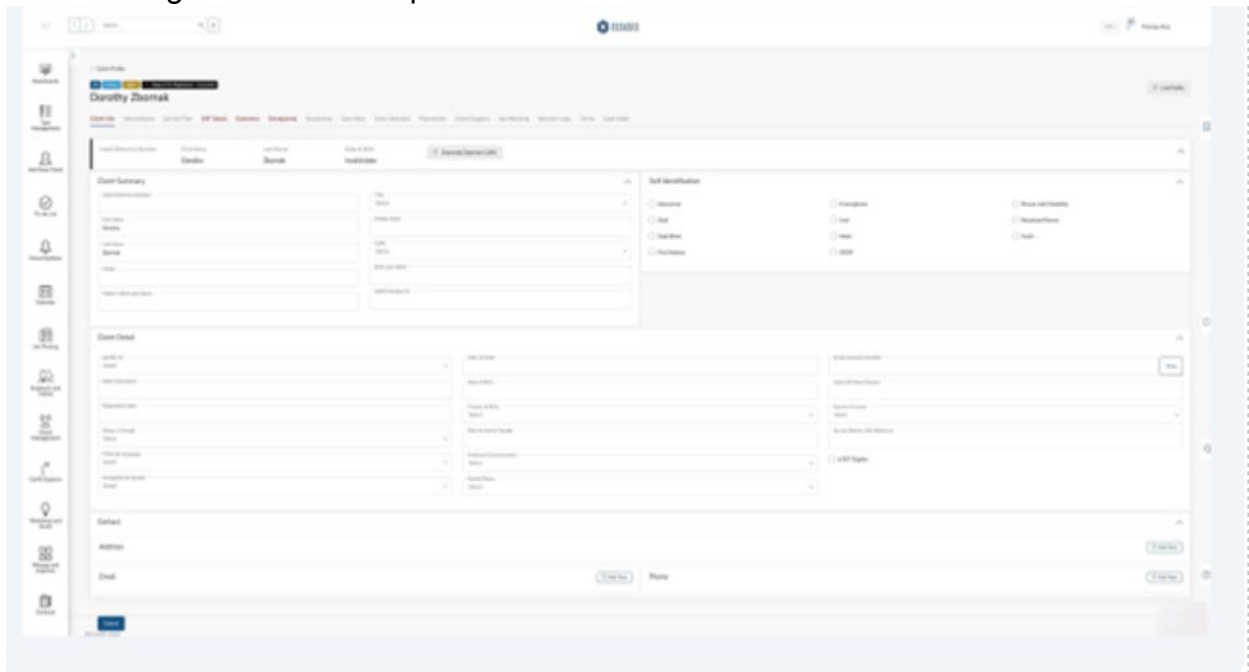
You have successfully added a new client profile.



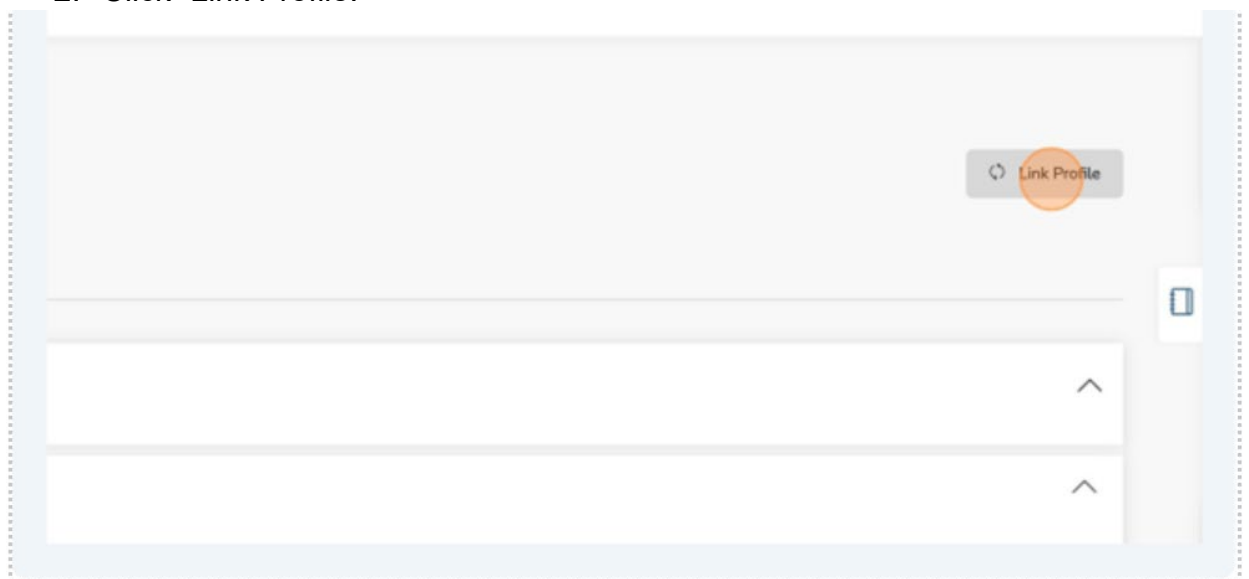
(7) Linking a Client Profile with CaMS

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

1. Navigate to the client profile.



2. Click "Link Profile."



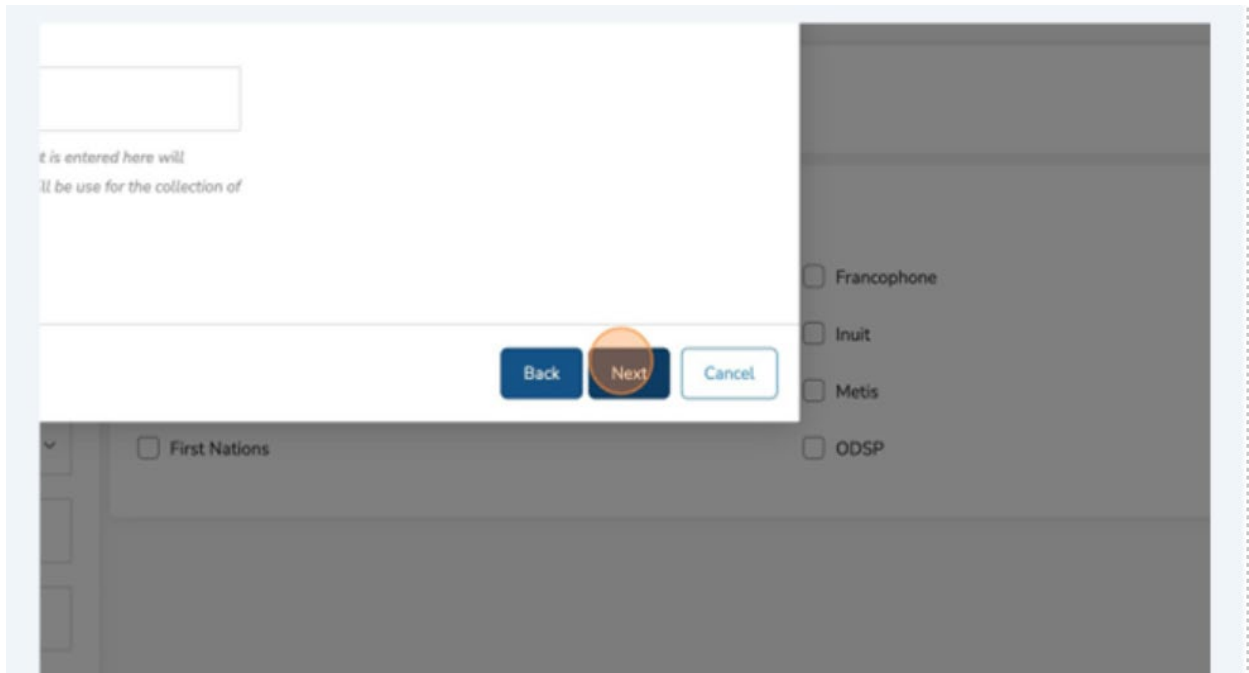
3. Click the "Client Reference Number" field.

The screenshot shows a multi-step process. At the top, a progress bar has four steps, with the first step, "Prerequisite", being the active step. Below the progress bar is a light blue warning box with the 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 the warning box is a text input field labeled "Client Reference Number". An orange circle highlights the input field, and a tooltip box points to it with the text "Client Reference Number is required". Below the input field 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 right of the form, there is a dropdown menu currently set to "First Nations".

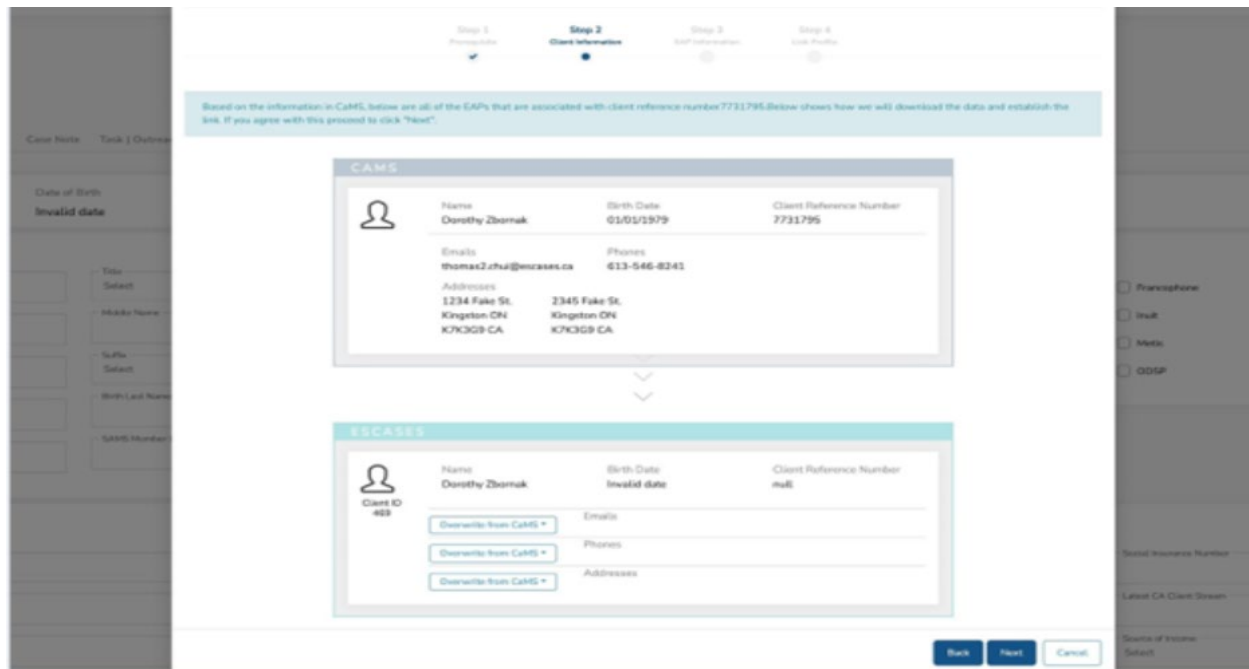
4. Insert the "Client Reference Number" from CaMS.

The screenshot shows the same multi-step process. The progress bar now has four steps: "Step 1 Prerequisite", "Step 2 Client Information", "Step 3 EAP Information", and "Step 4 Link Profile". The "Prerequisite" step is still active. The light blue warning box is still present. The "Client Reference Number" input field now contains the text "7731795". The text below the input field remains the same: "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 right of the form, there are two buttons: "Back" and "Next".

5. Click "Next."



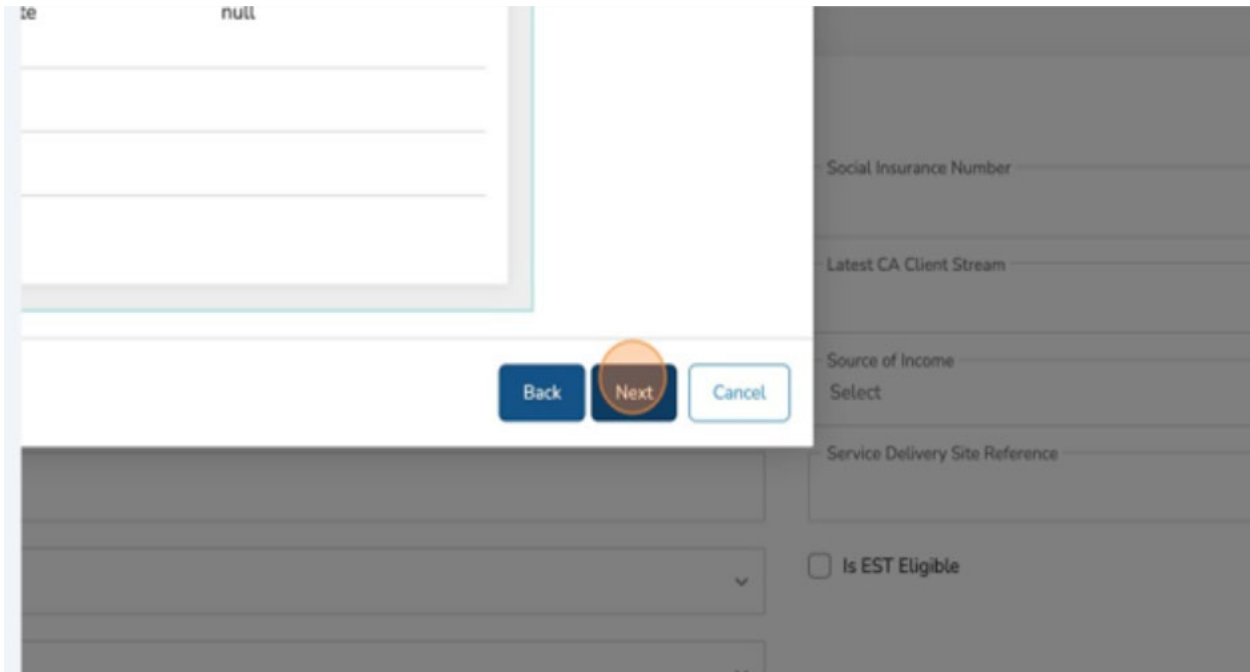
6. Select which data to download from CaMS.



❖ 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. A white modal window is centered on the screen, containing three buttons: 'Back' (blue), 'Next' (orange with a white circle), and 'Cancel' (white with a blue border). The 'Next' button is highlighted with a white circle. In the background, a greyed-out form is visible with fields for 'Social Insurance Number', 'Latest CA Client Stream', 'Source of Income' (with a 'Select' dropdown), 'Service Delivery Site Reference', and 'Is EST Eligible' (with an unchecked checkbox). The top left of the background form shows the text 'te' and 'null'.

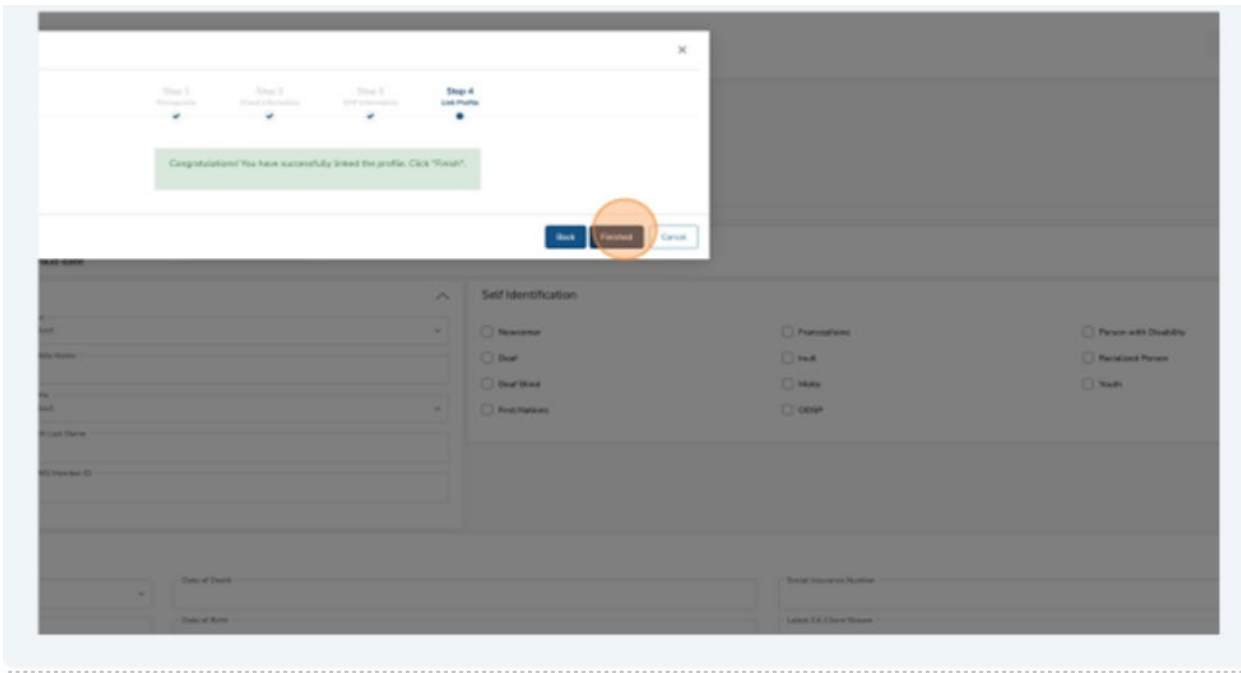
Review the EAP Details

- 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.

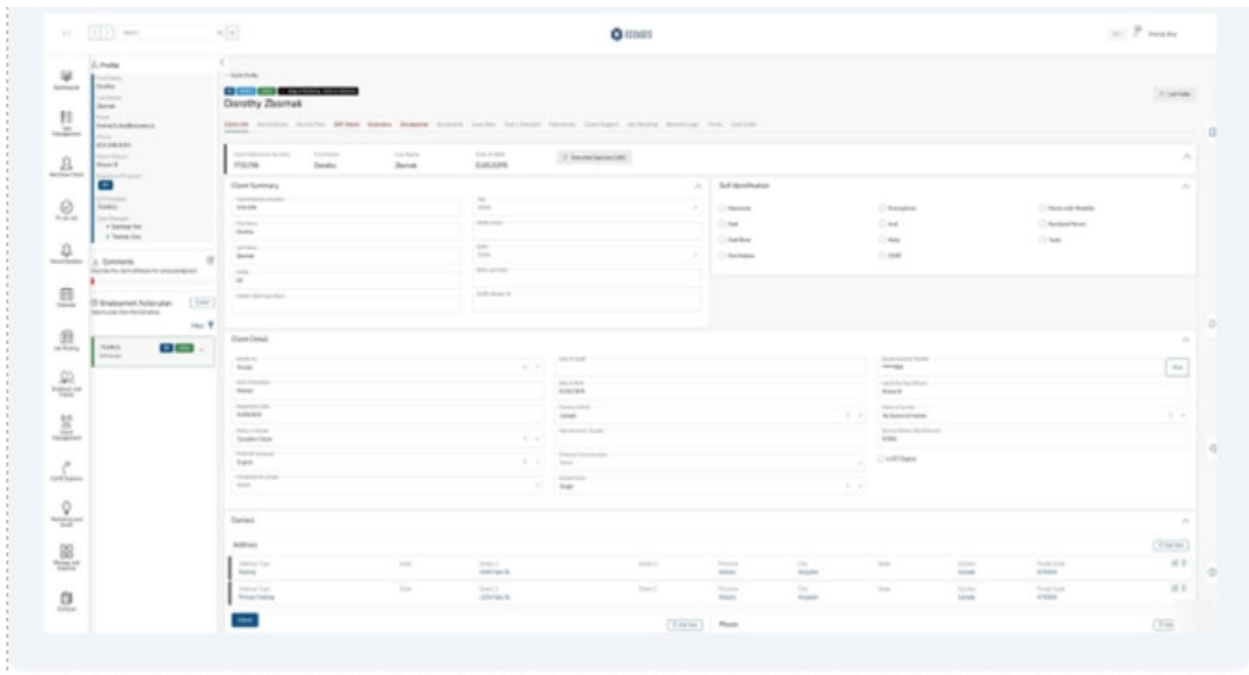
Please wait while the sync takes place. The following message will display:

“Congratulations! You have successfully linked the profile”.

8. Click "Finished."



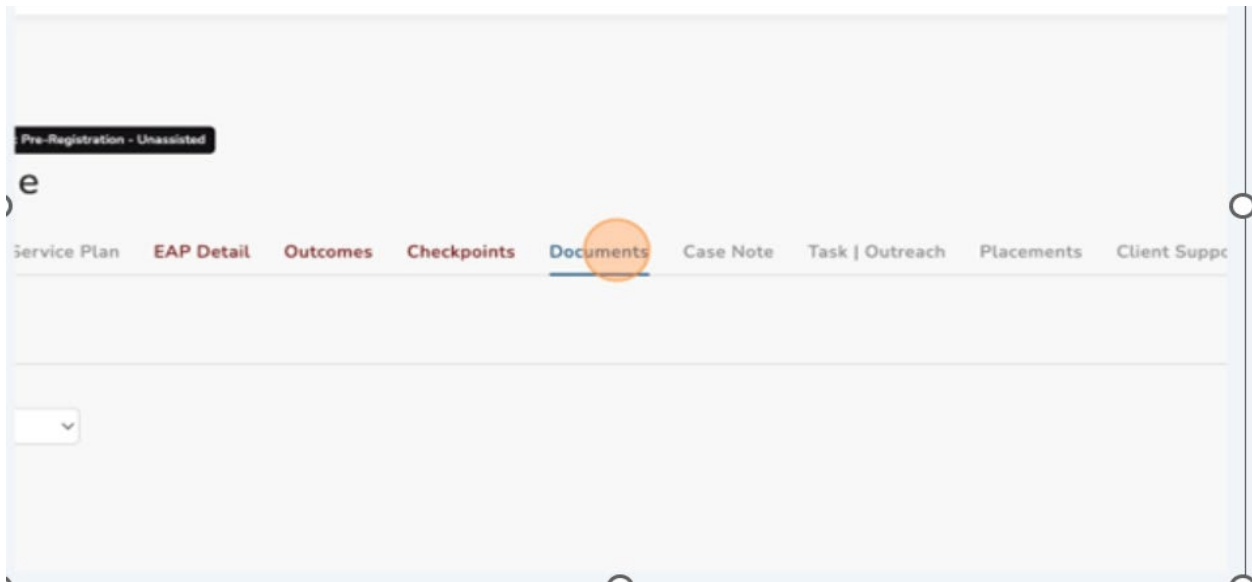
9. You have now successfully linked a client profile with CaMS.



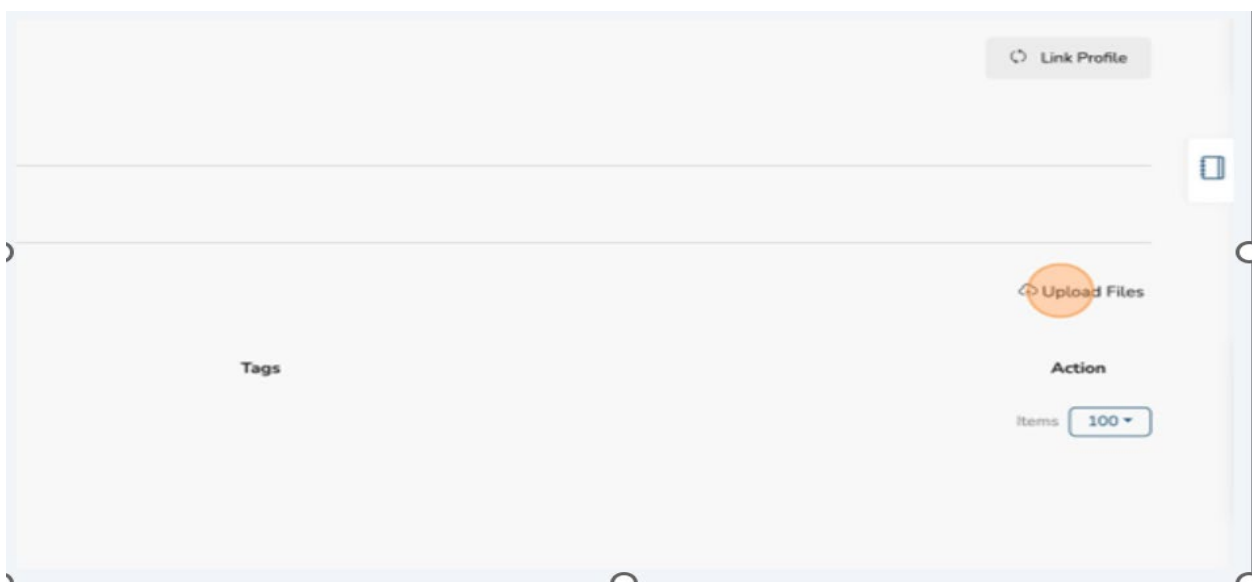
(8) Upload a Document to a Client Profile

✓ Note: The “Documents” tab is used to upload any relevant documents to the client file. The documents uploaded are not synced with CaMS.

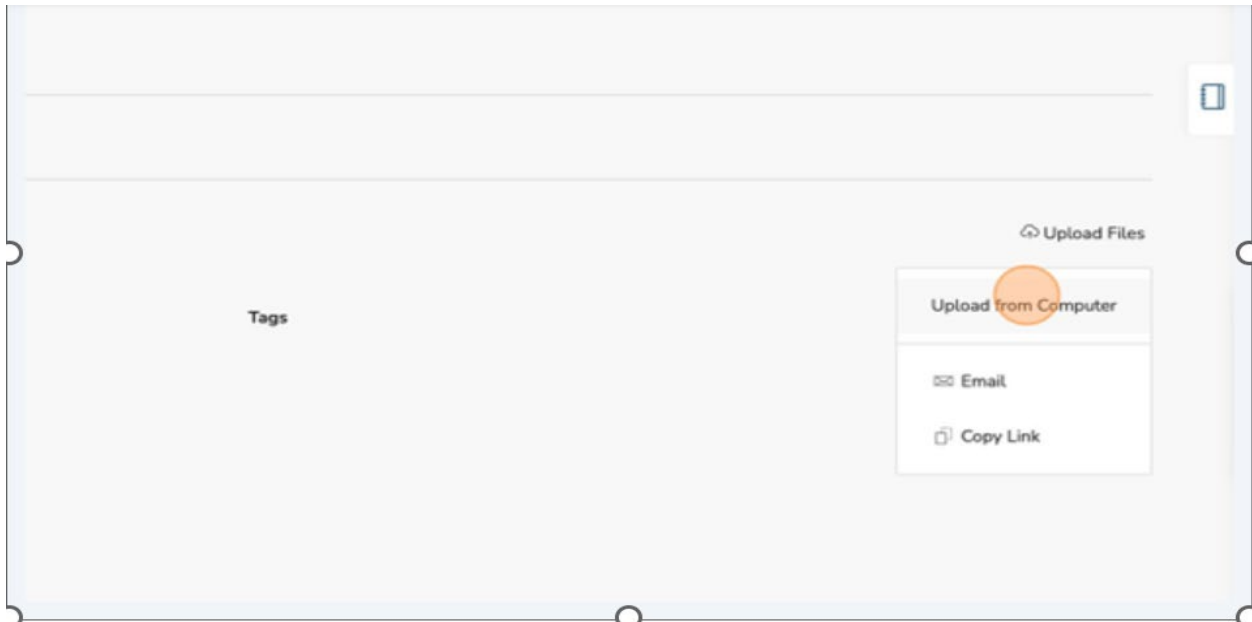
1. Navigate to the Client profile.
2. Click “Documents.”



3. Click “Upload Files.”

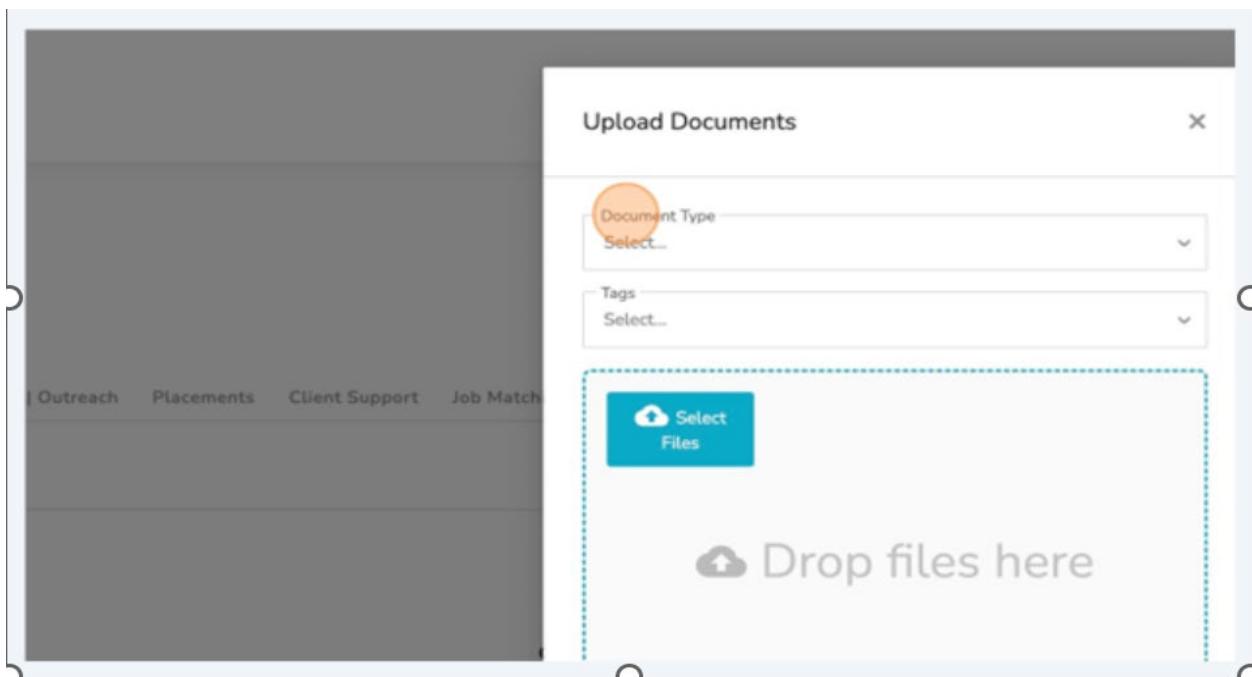


4. Click “Upload from Computer.”

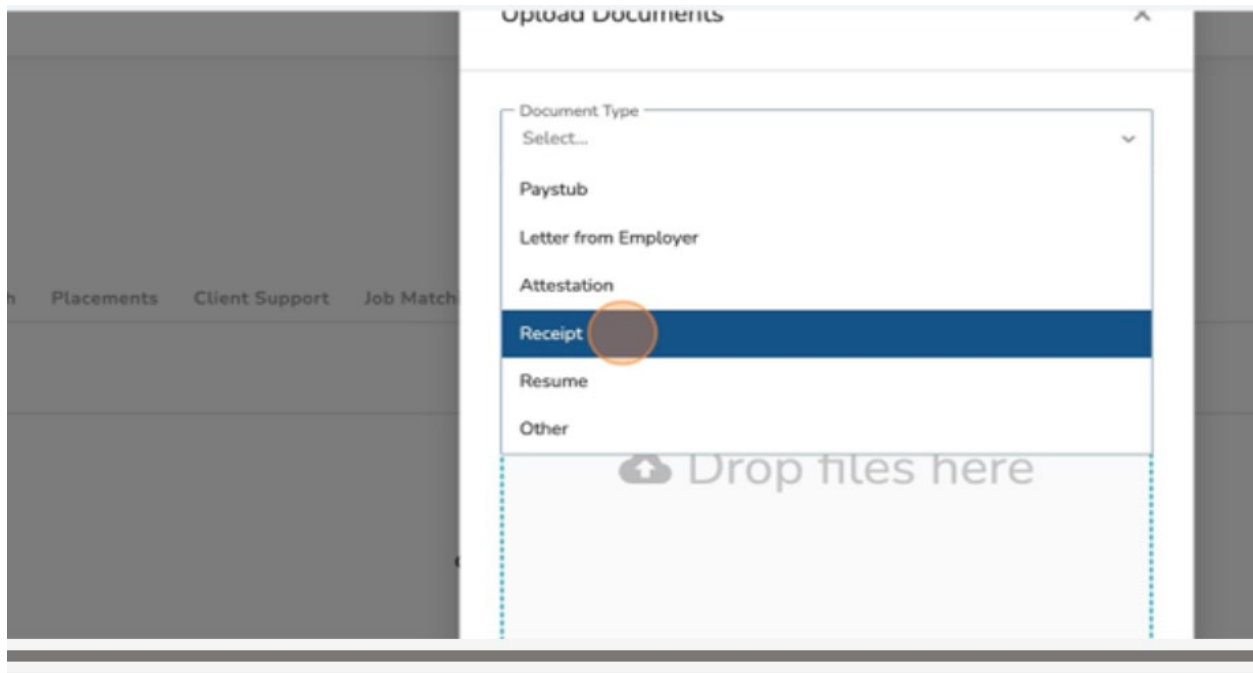


❖ Tip: “Copy Link” can be used to send a link to the client. The client is able to upload documents directly to the “Documents” tab.

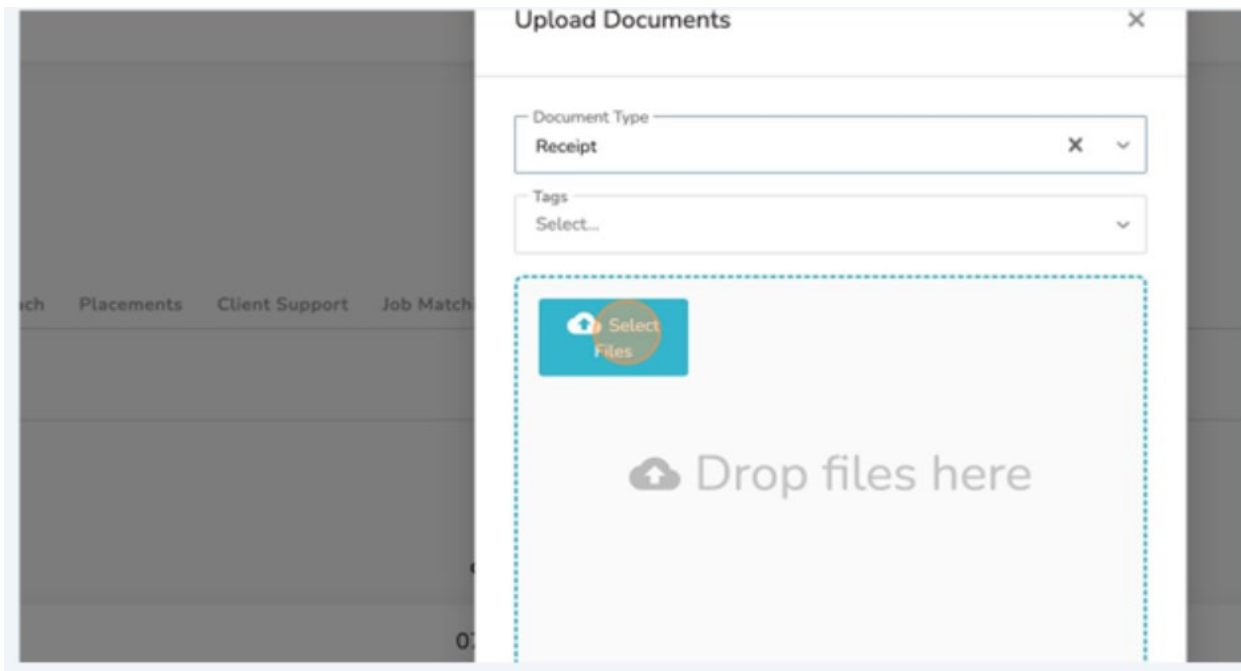
5. Click “Document Type.”



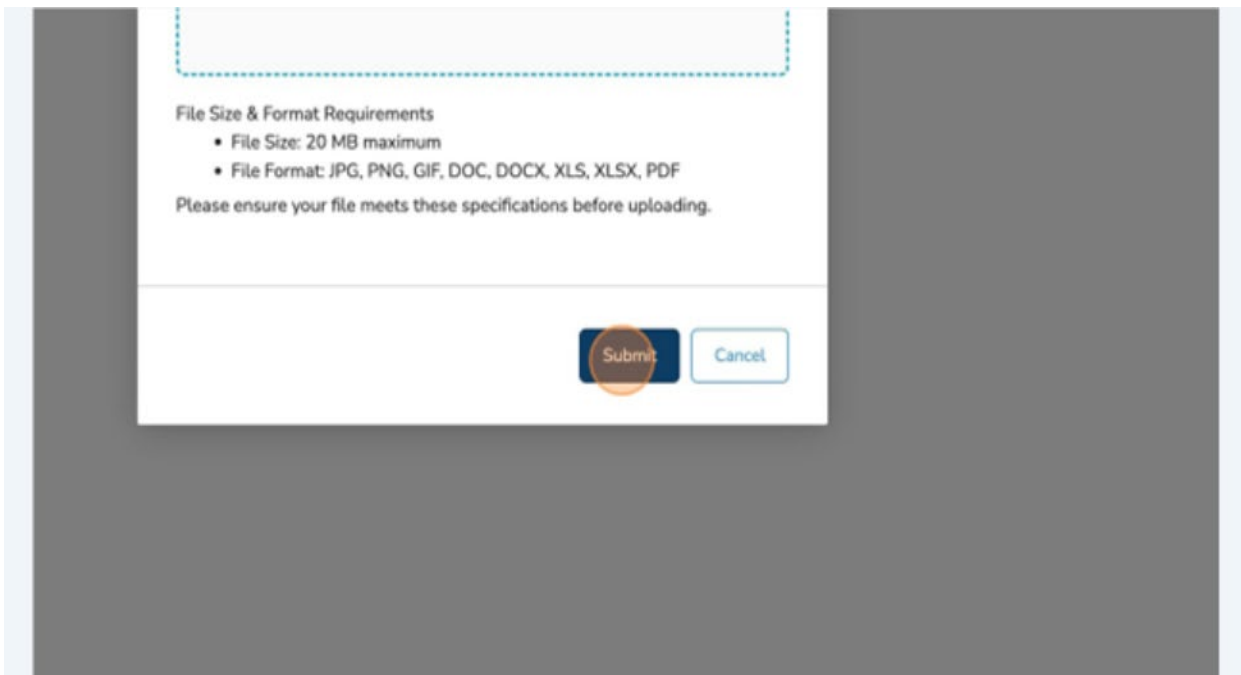
6. Select the appropriate document type.



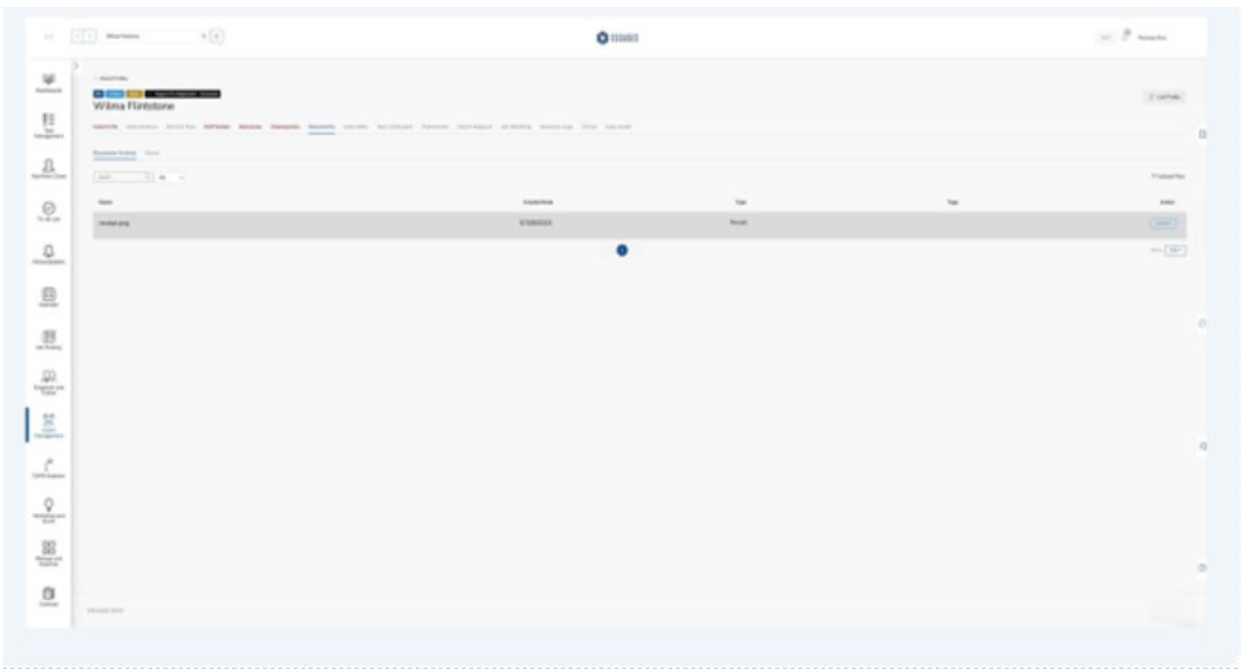
7. Click "Select Files" and choose the appropriate file from your computer.



8. Click "Submit."

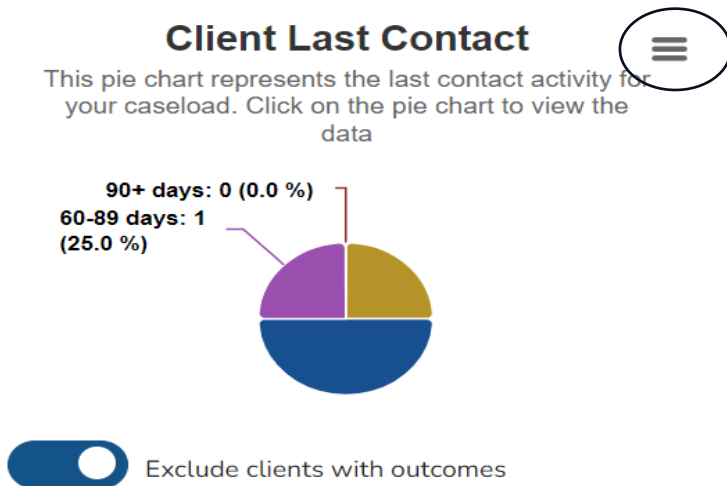


9. Your file has been successfully uploaded to the client profile.



(9) 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.
1. Clicking on the three lines in the right-hand corner will produce a list of options to download the data.



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

Client Last Contacted Within 15-29 days Export X

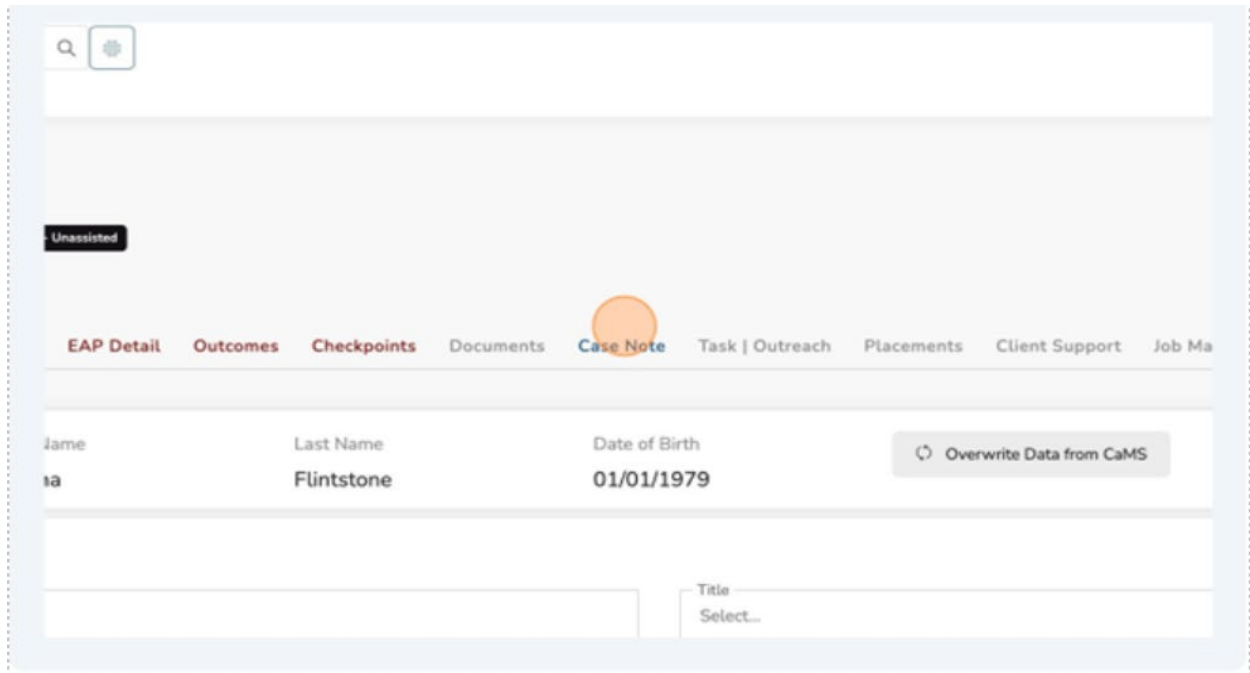
Personal Ref: 7737899

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 Add Note

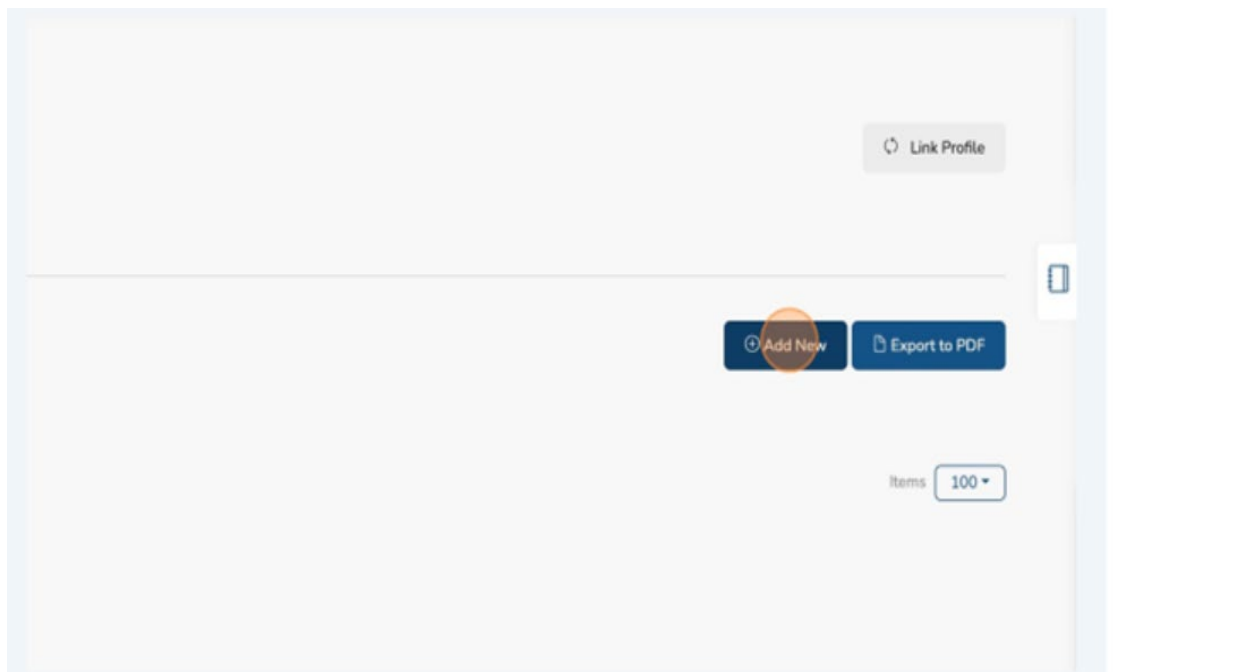
Showing 1 to 1 of 1 entries Items 5 Ok

To Create a Case Note:

1. Navigate to the client profile.
2. Click “Case Note.”



3. Click “Add New.”



4. Select "Communication Type."

The screenshot shows a web form titled "Add Case Note - Wilma Flintstone". The form has several input fields: "Service Plan" with the value "SP 239 - (IES)", "Created" with the date "08/09/2023", "Communication Type" with a dropdown menu showing "Select...", and "Activity Type" with a dropdown menu showing "Select...". Below these fields is a large text area labeled "Note". The form is set against a dark grey sidebar with navigation options like "Outreach", "Placements", and "Client".

5. Select the appropriate "Communication Type."

This screenshot shows the same "Add Case Note" form as above, but with the "Communication Type" dropdown menu open. The menu lists several options: "Note", "Email", "Phone", "Text", "Virtual", and "In-Person". The "Note" option is currently selected and highlighted in blue. The other fields and the form layout remain the same.

6. Click "Activity Type."

Add Case Note - Wilma Flintstone X

Service Plan: SP 239 - (IES) Created: 08/09/2023

Communication Type: Note

Activity Type: Select...

- Apprenticeship
- Arrange for Support
- Attended Interview/Update
- Career Coaching
- Career Exploration
- Communication/Advocacy (OW/ODSP)
- Cover Letter

7. Select the appropriate “Activity Type.”

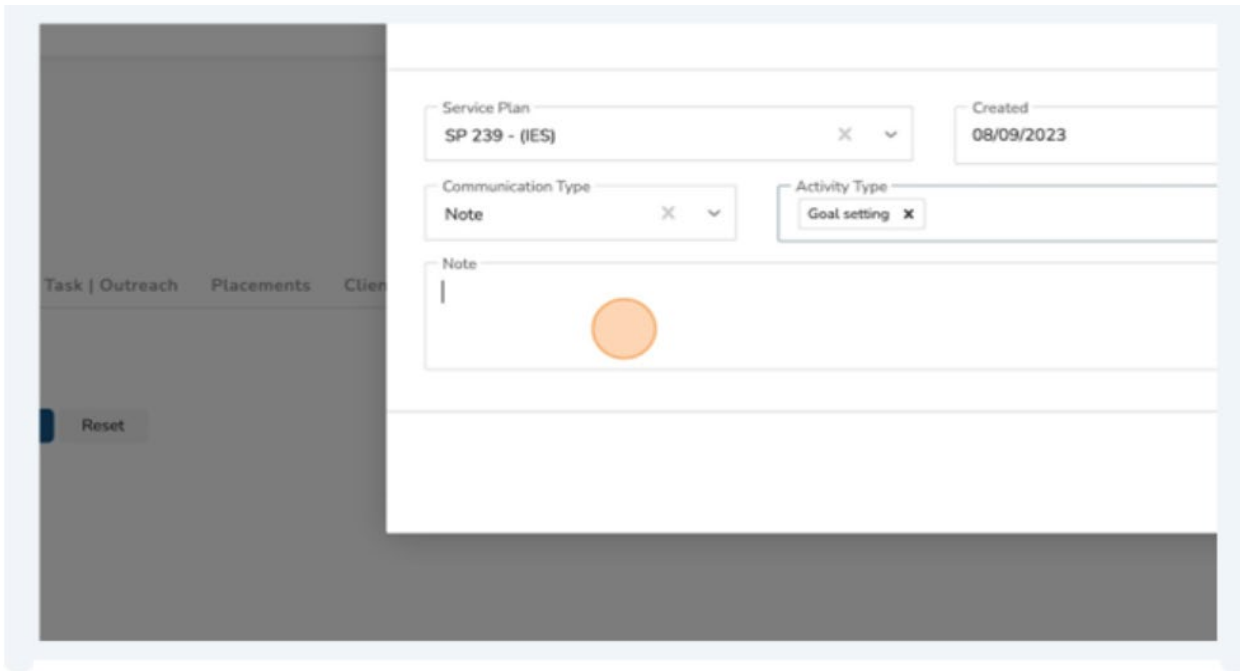
Service Plan: 39 - (IES) Created: 08/09/2023

Communication Type: [Empty]

Activity Type: Select...

- Follow-Up
- General Update/ Follow up
- Goal setting**
- Help with forms & computer
- Intake/Needs Assessment
- Interview Prep
- Interview Techniques
- JCP

8. Click the “Note” field.



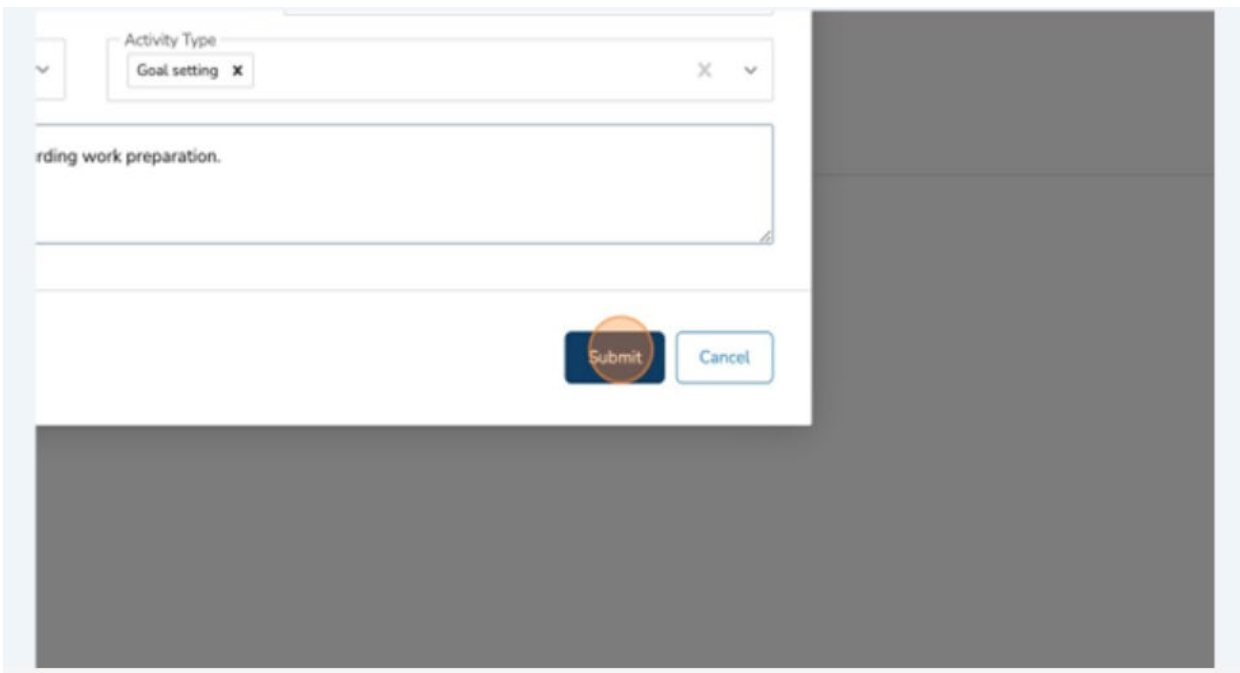
The screenshot shows a form with the following fields:

- Service Plan: SP 239 - (IES)
- Created: 08/09/2023
- Communication Type: Note
- Activity Type: Goal setting
- Note: A text area with a vertical cursor and a large orange circle in the center.

On the left side of the form, there is a sidebar with a "Reset" button and a list of tabs: "Task | Outreach", "Placements", and "Client".

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

10. Click “submit.”



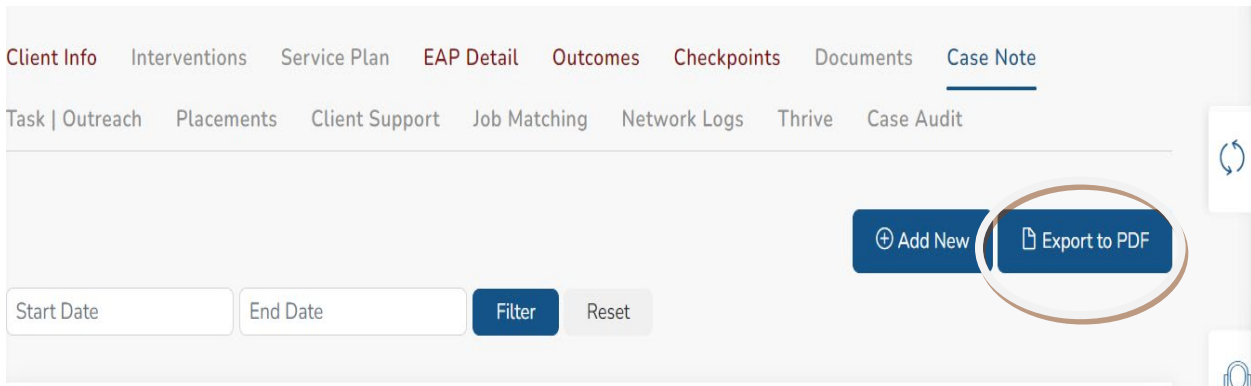
The screenshot shows the form with the following fields:

- Activity Type: Goal setting
- Note: A text area containing the text "rding work preparation."
- Submit: A blue button with a white circle and the text "Submit".
- Cancel: A light blue button with the text "Cancel".

You have now successfully created a new note.

To print a list of notes:

1. Click “Export to PDF.”



- Under “Downloads” Select “Open File.”
 - A list of Case Notes for the client will be displayed.
- ✚ Notes in ESCases must contain factual information and not personal viewpoints or information not related to the client’s employment activities. Case-Note standards include:
- Accuracy - Notes accurately reflect interactions, assessments, and outcomes.
 - Clarity and Objectivity - Use clear, concise language. Maintain objectivity and avoid biased or judgmental language, subjective interpretations, or assumptions.
 - Documentation of Consent – Document informed consent, note any changes or updates to consent.
 - Outcomes and Closures – Document any goals achieved, referrals made and recommendations.
- ✚ Please refer to the standard operating procedures for direction on inputting notes in ESCases.

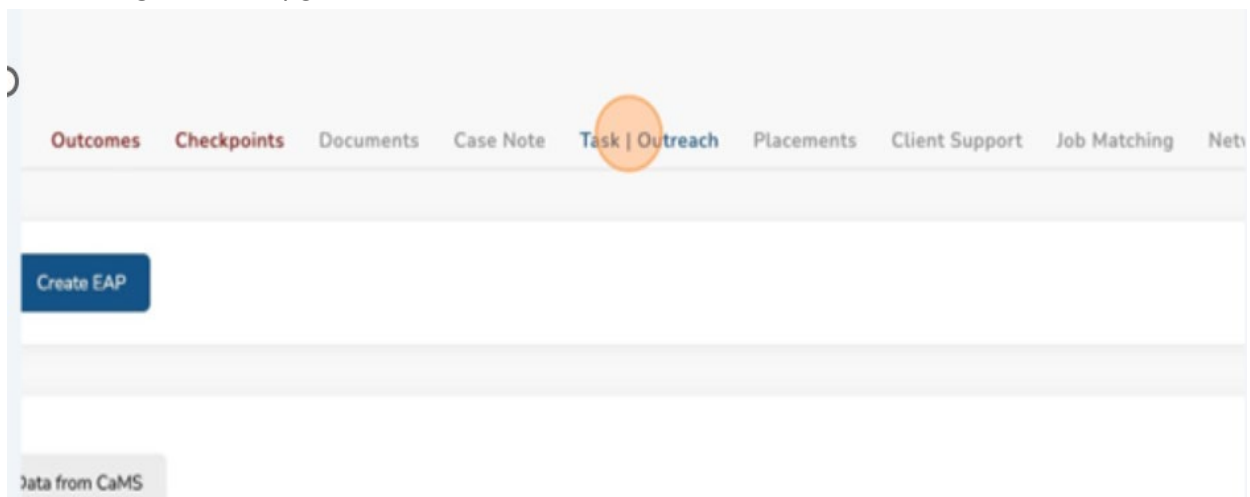
(10) Add a Task

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.

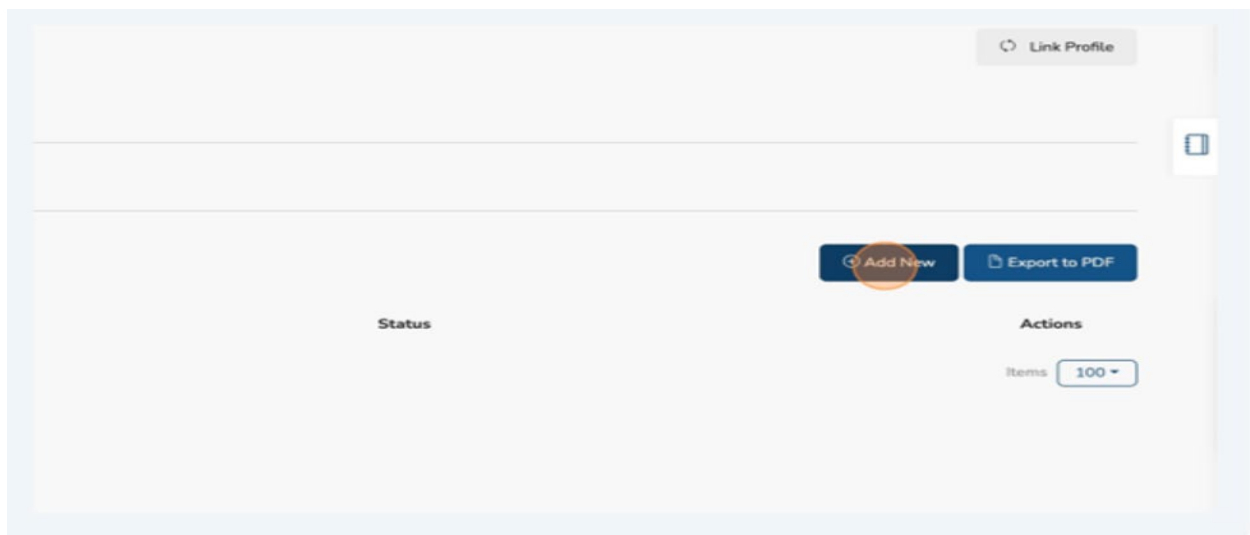
- ✚ Note: “Thrive” is currently not used by London Regional Employment Services (LRES). Do not use “Thrive Task” when creating a “New Task”.

Navigate to the client profile.

1. Click “Task/Outreach.”



2. Click “Add New.”



3. Click "Action Date."

The screenshot shows a task management interface. On the left, there is a sidebar with tabs for 'Outreach', 'Placements', and 'Client'. The main area contains a form with several fields: 'Action Date' (with a calendar dropdown), 'Anticipated Completion Date', and 'Completed Date'. The calendar for September 2023 is open, and the date '8' is highlighted with a blue circle. Below the calendar, there are fields for 'Assign to Users' (showing 'Thomas Chui') and 'Send task to client' (set to 'None'). A 'Disable Reminder' button is also visible.

4. Select the appropriate start date.

- ✚ Action date is the date the task should start. Task reminders will start to generate email reminders beginning on the action date and terminating on the anticipated completion date or when the completion date is entered. The "Disable Reminder" tab can be used to disable the daily notifications.

5. Click "Anticipated Completion Date."

The screenshot shows a task management interface. The form has several fields: 'Site' (with '2023' entered), 'Category' (with a dropdown arrow), 'Description', 'Comments (This comment section is for your internal usage)', 'Users', 'Anticipated Completion Date' (highlighted with a blue circle), and 'Completed Date'. There is also a 'Send task to client' field.

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... (highlighted)

Completed Date: [Empty]

Action Description: [Text Area]

Comments (This comment section is for your internal usage): [Text Area]

Assign to Users: [Dropdown]

Send task to client: [Dropdown]

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: A dropdown menu is open, showing 'Client Action' (highlighted in blue), 'Follow up', and 'Thrive Task'.
- Completed Date: (empty)
- Comments: (This comment section is for your internal usage) (empty)
- Assign to Users: Thomas Chul
- Send task to client: None

9. Click "Action Description" field.

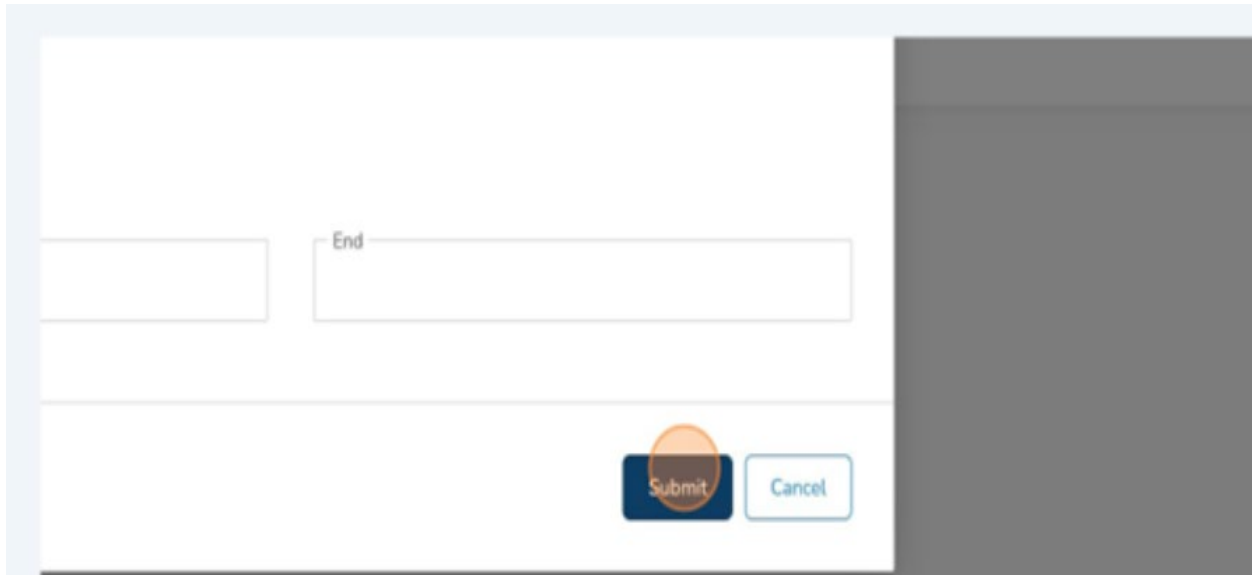
The screenshot shows the 'New Task' form with the 'Action Description' field highlighted. The form contains the following fields and values:

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

10. Fill in the description.

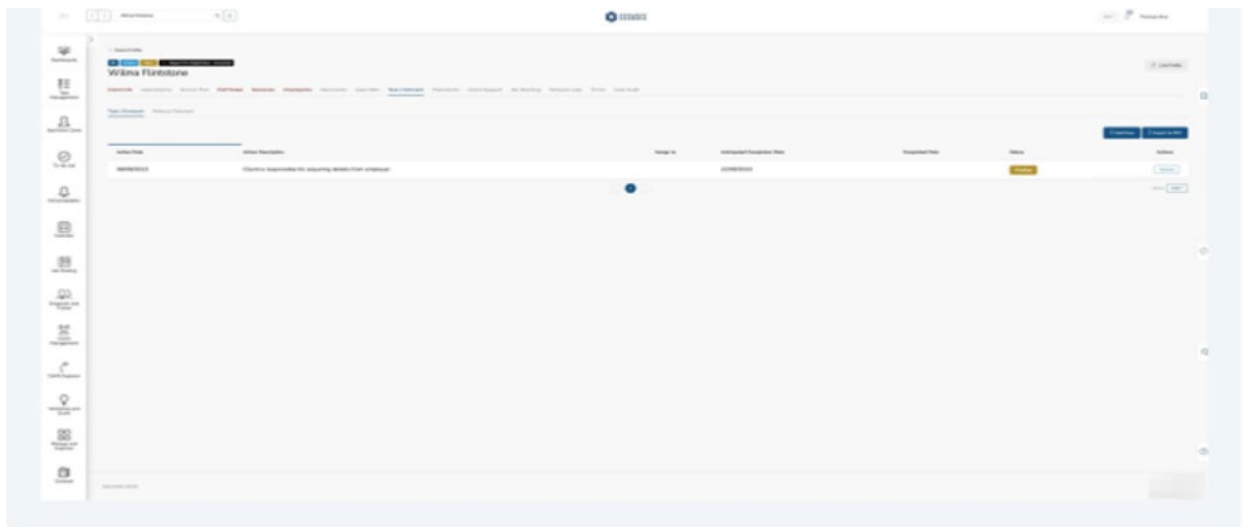
 Note: The standard reminder period is set to 7 days. Users assigned to tasks will get daily reminders through email and within ESCases notifications, starting from 7 days prior to the "Anticipated Completion Date" and continuing up until that date.

11. Click "Submit."



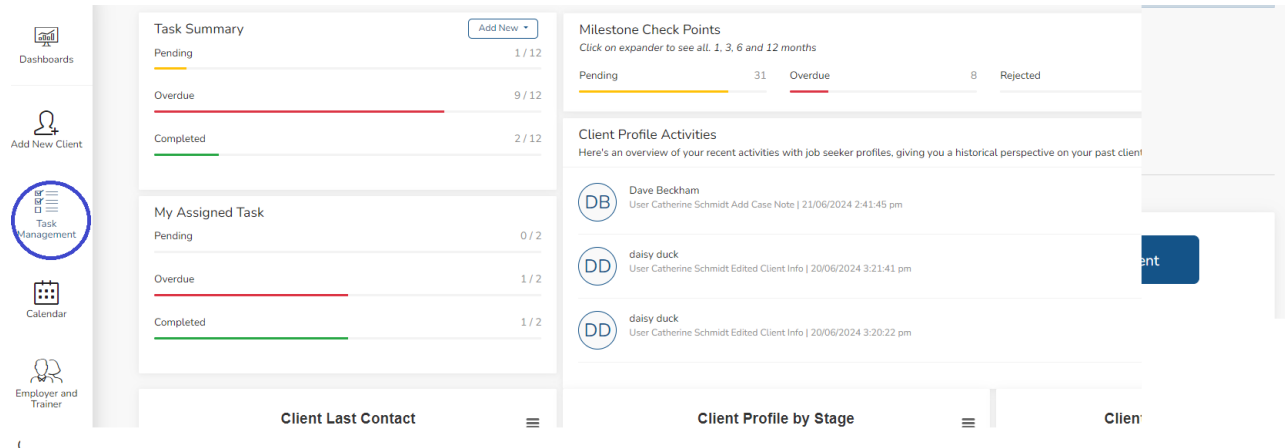
A screenshot of a web form for creating a task. The form has a white background and is set against a dark grey sidebar on the right. It contains two input fields: a smaller one on the left and a larger one on the right labeled "End". At the bottom right of the form, there are two buttons: a blue "Submit" button with a white circle and a white "Cancel" button.

You have now created a new task.



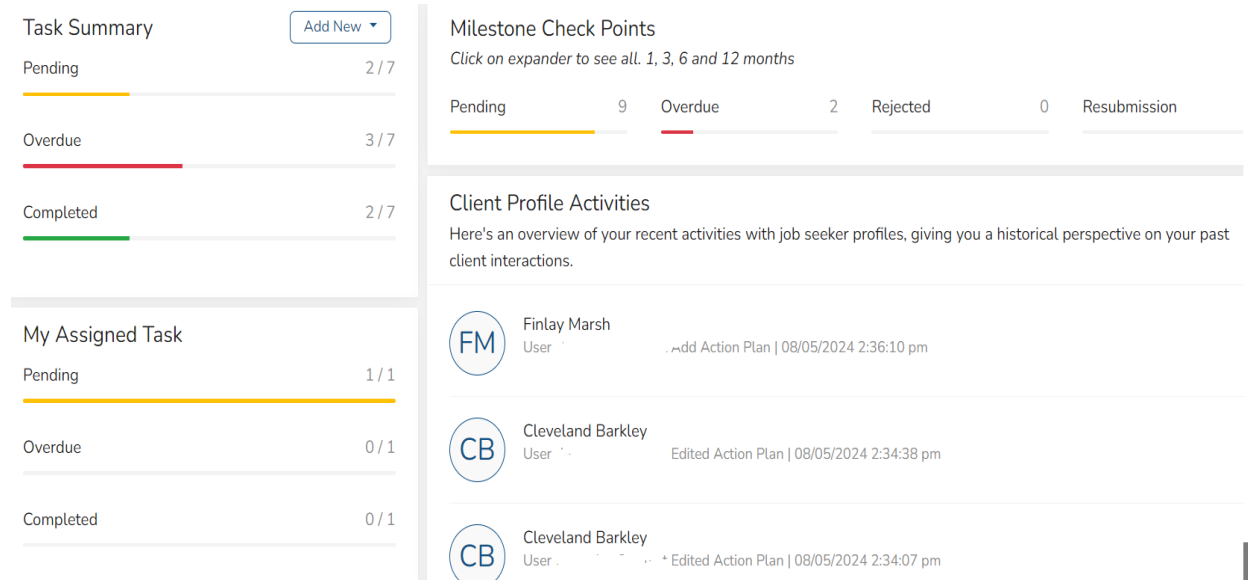
To View the “Task Management” area:

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



4. Default is “Task.”

The following information can be viewed under task management:



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

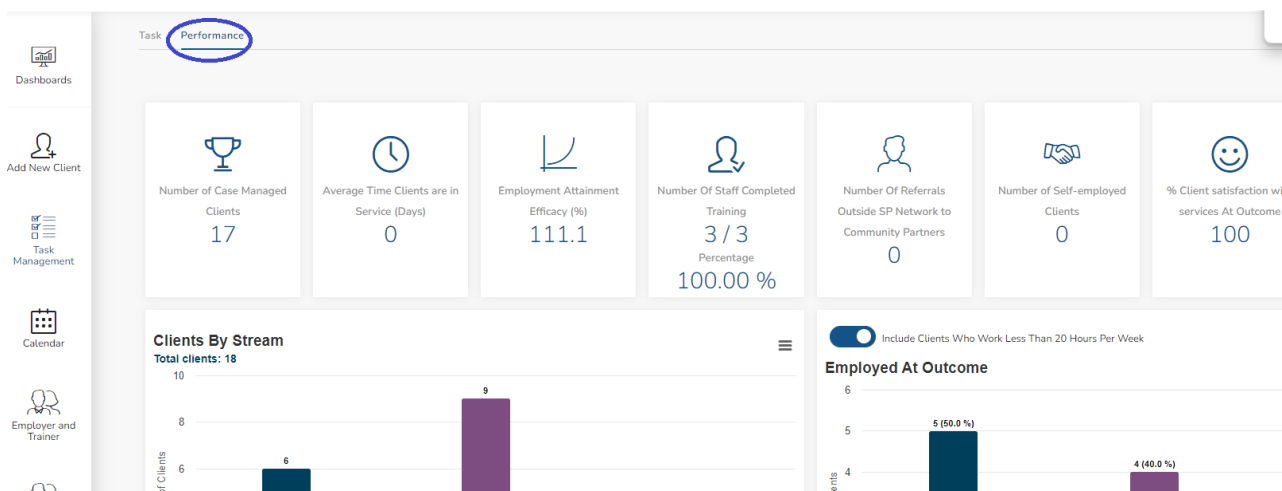
Select "Performance" to view various reports by stream such as:

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

Permissions

 New section

Additional reporting can be viewed by selecting "Performance."



The following information can be viewed under “Performance:”

- Number of case managed clients.
- Average time clients are in service.
- Employment attainment.
- Number of staff completed training.
- Number of referrals outside SP network to community partners.
- Number of self-employed clients.
- % client satisfaction with services at outcome.
- % client satisfaction with services at 12 months.

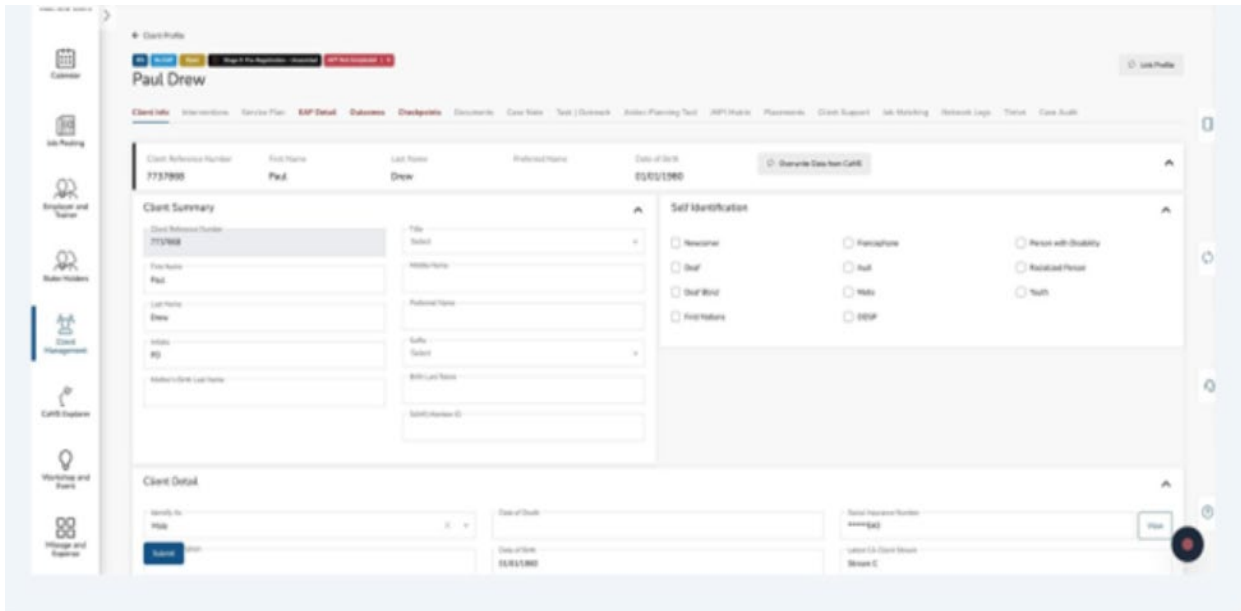
Charts are available for the following:

- Clients by stream.
- Employed at outcome.
- Job seeker retained by employer overtime.
- Unable to contact client (1, 3, 6, 12 months).
- % client satisfaction by specialized population at outcome.
- % client satisfaction by specialized population at 12-month outcome.
- Life stabilization, employment assistance, specialized services, skills development, job attainment supports, job retention supports.
- Income source.
- Hiring per 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.

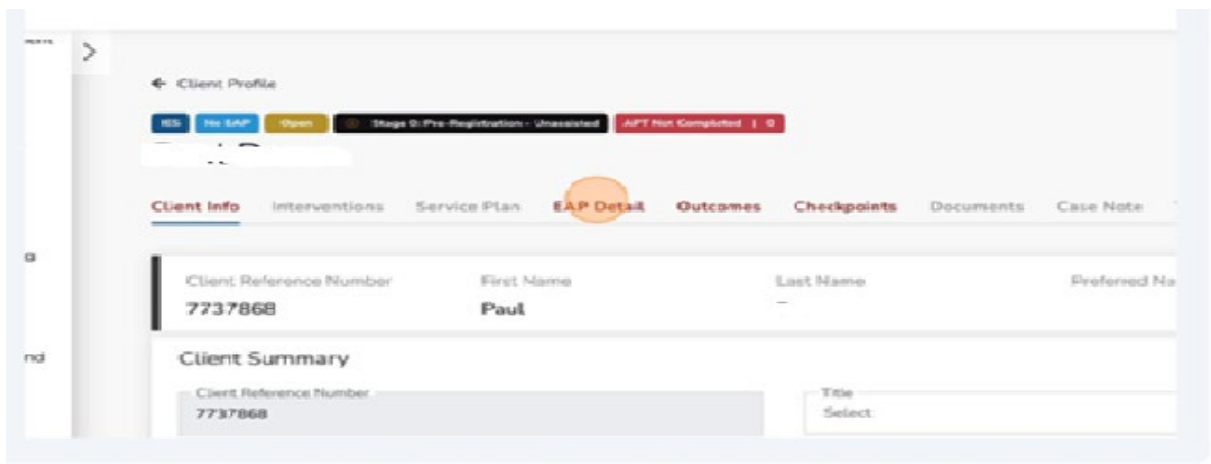
(11) Create an EAP, Sub-Goal, Planned Item with the EAP Assistant

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

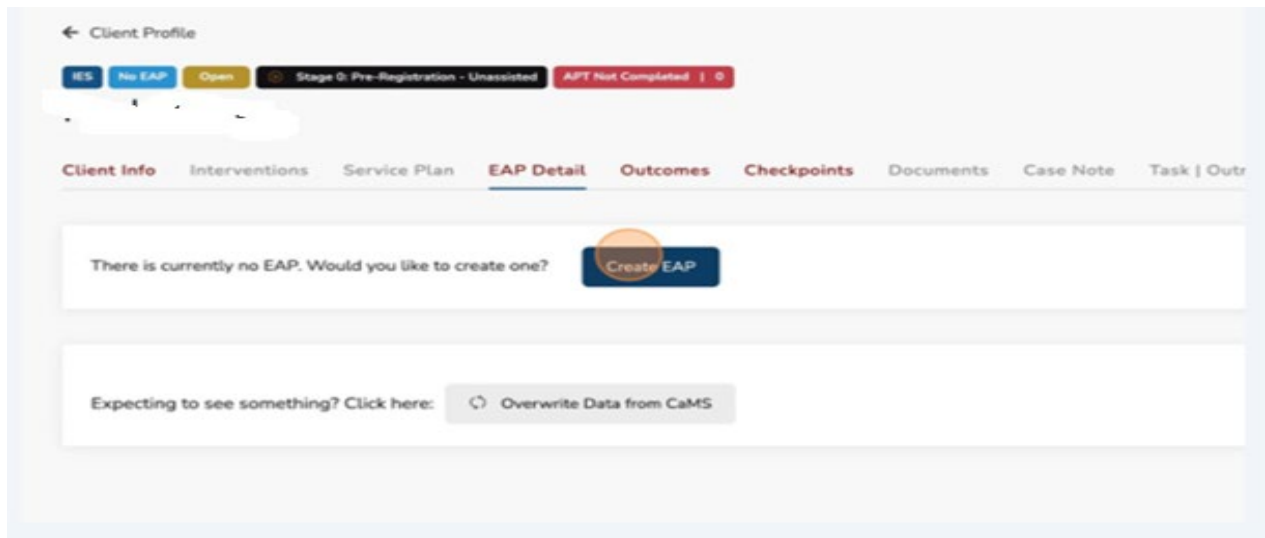
1. Navigate to the Client Profile.



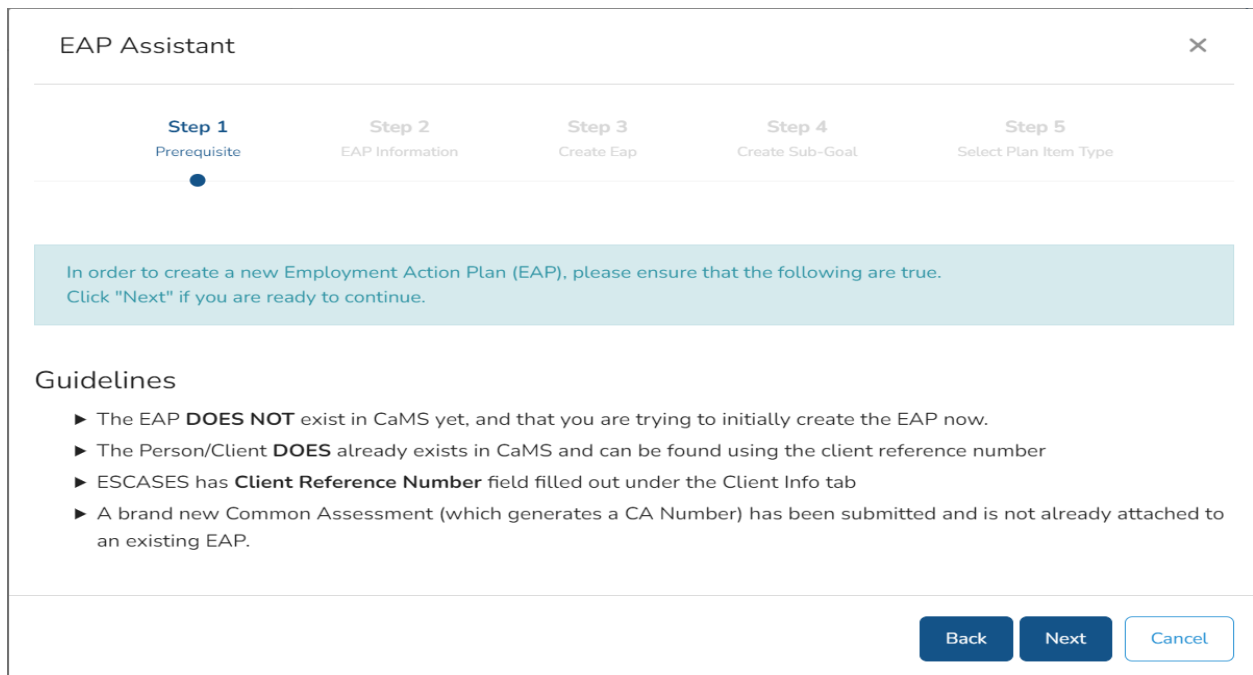
2. Click "EAP Detail."



3. Click "Create EAP."



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

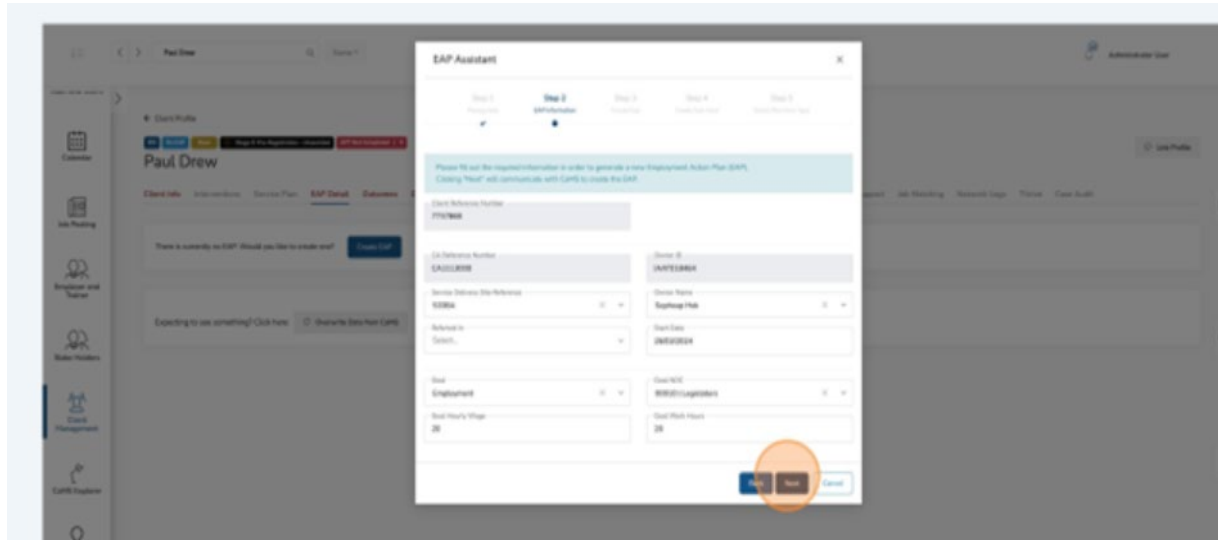


4. Click "Next".

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

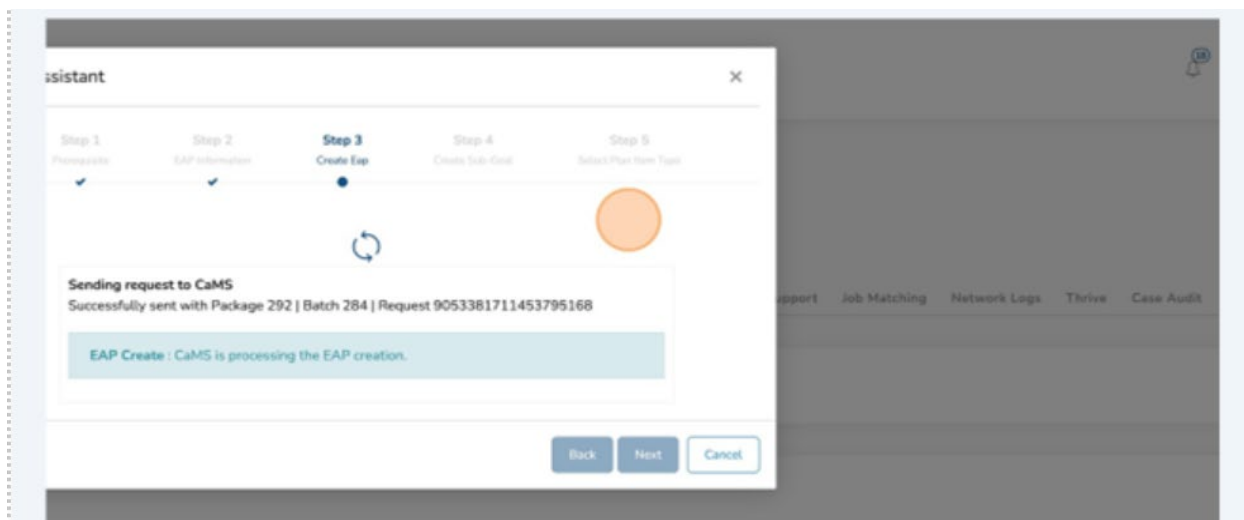
✓ Note: Ensure the Service Delivery Site is entered, or an error message will display.

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



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

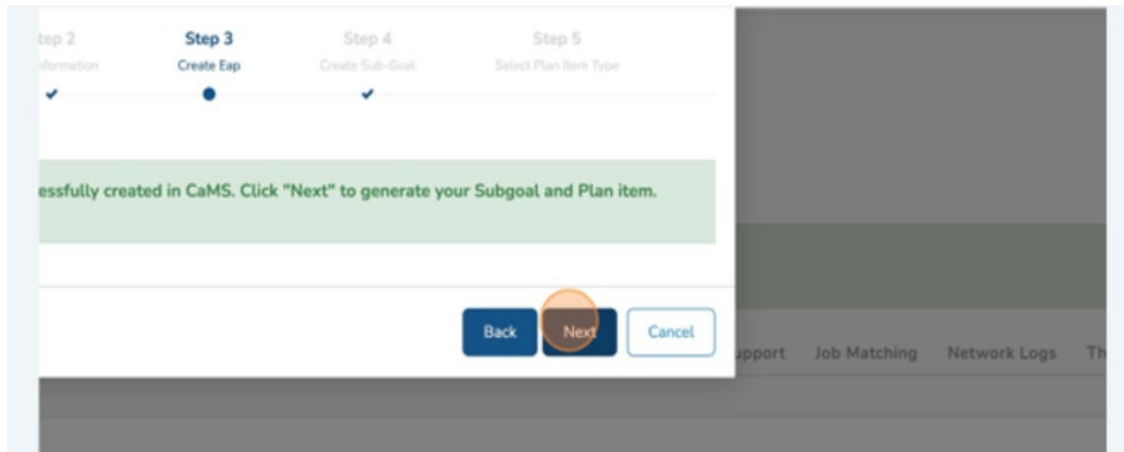
The creation of the EAP will put you in a queue to upload the details into CaMS.



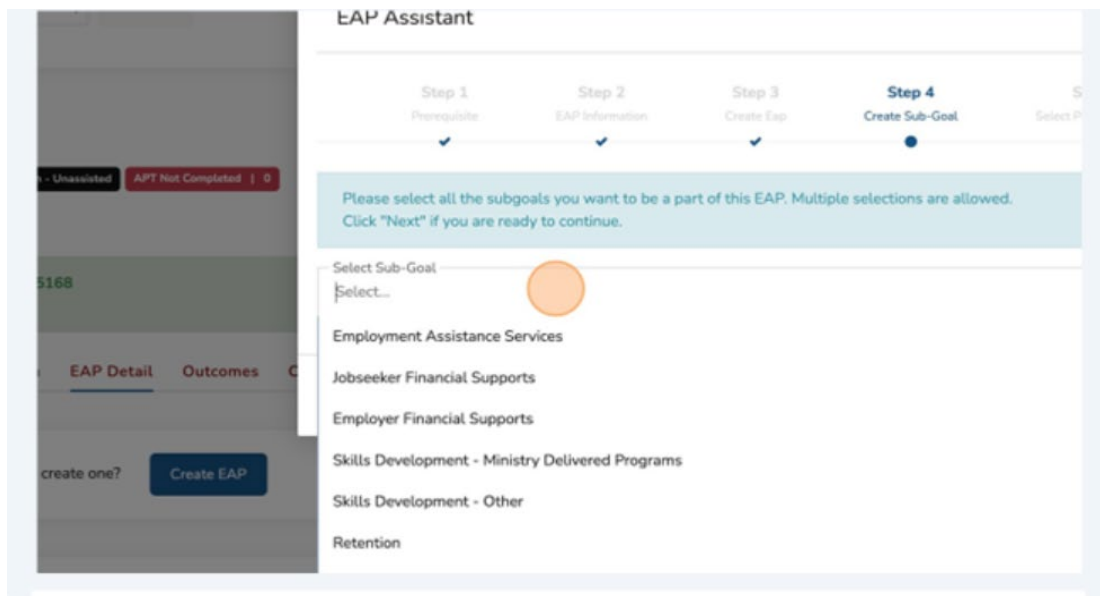
❖ Tip! You can multitask within ESCases while the progress modal is displaying your place in queue by working in another tab.

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

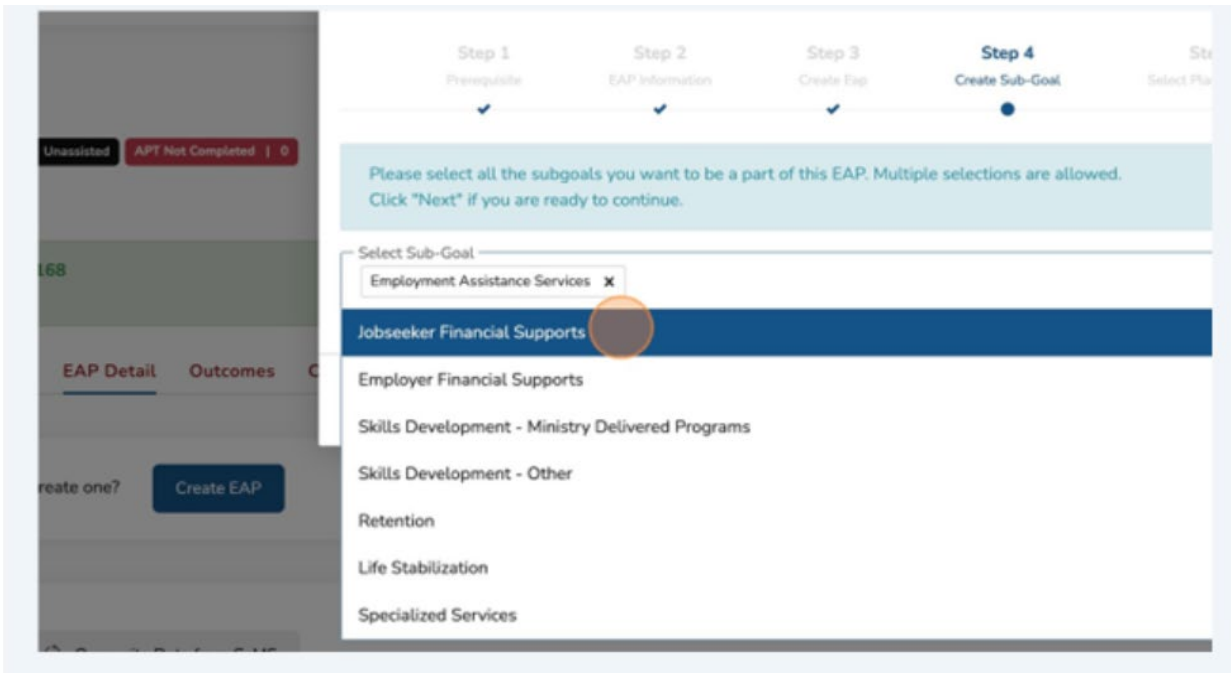
6. Click "Next."



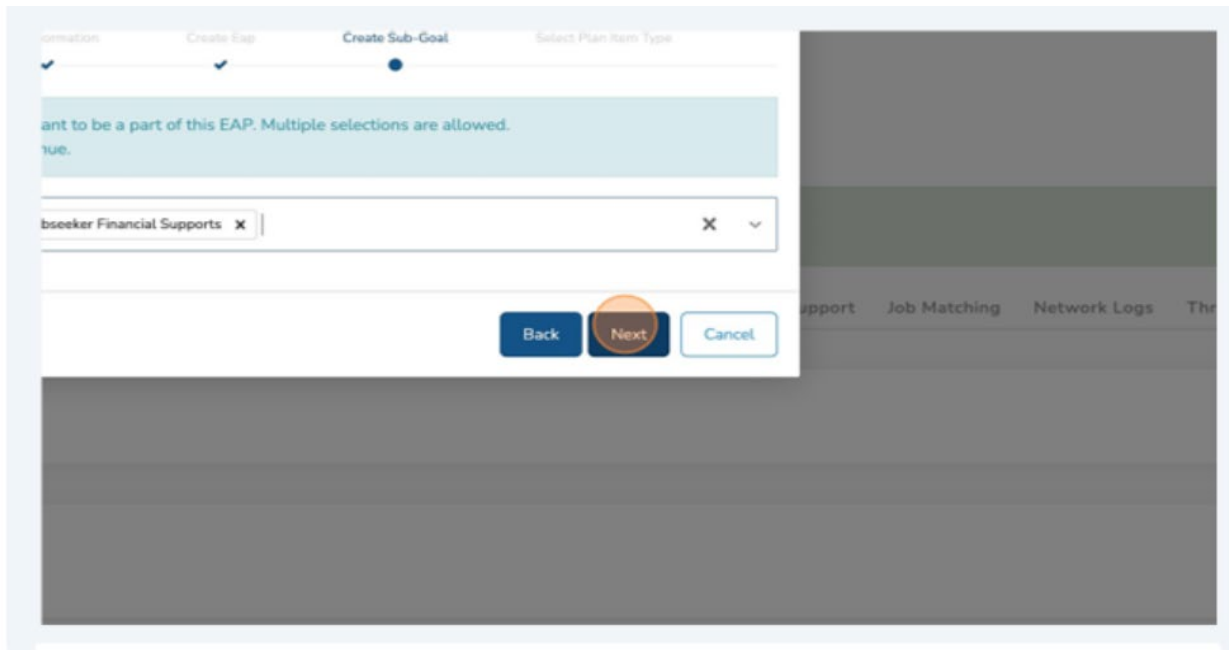
7. Click "Select Sub-Goal."



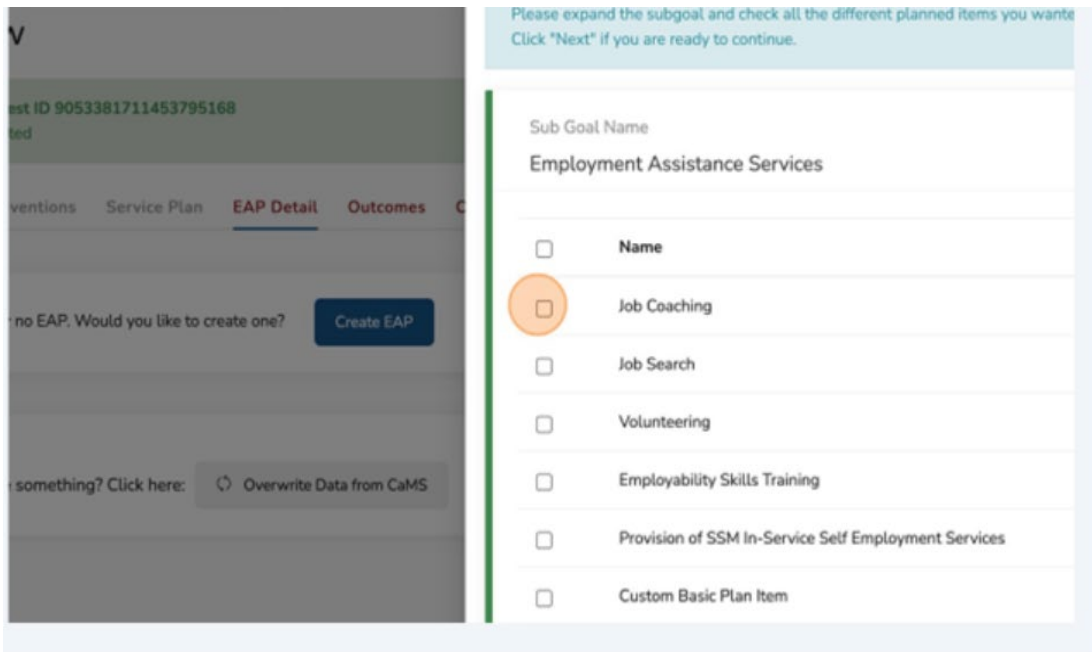
8. You can add multiple sub-goals by selecting them from the “Select Sub-Goal.” menu.



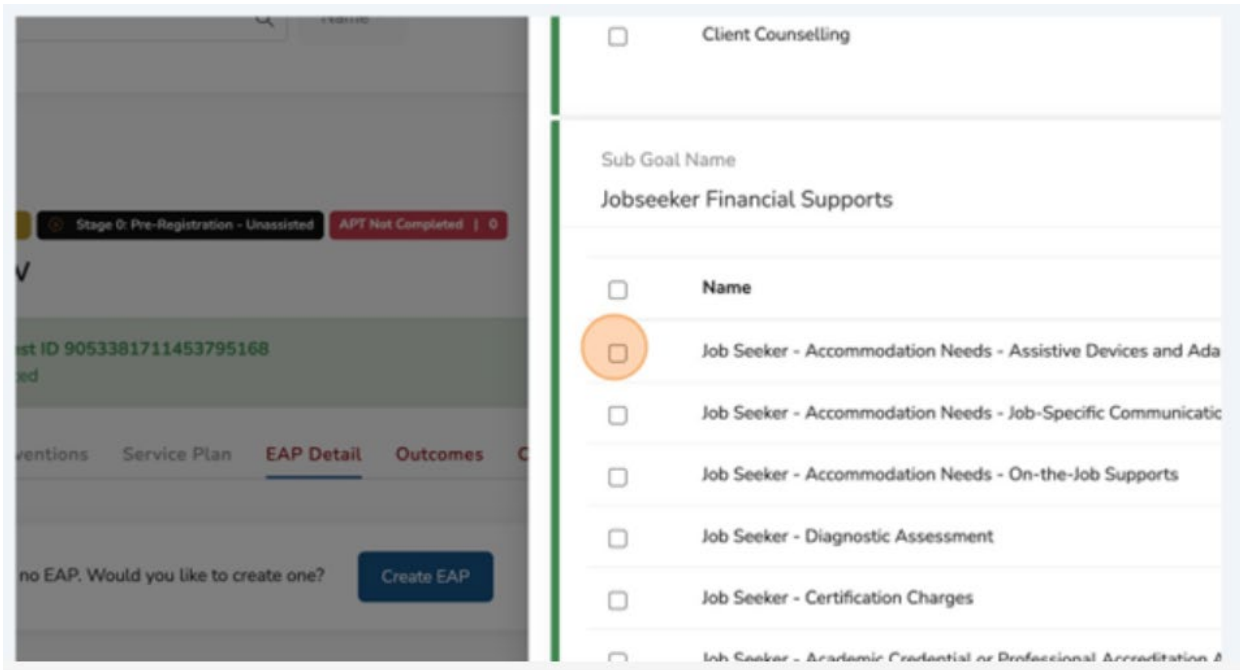
9. When you have selected all your sub-goals, click “Next.”



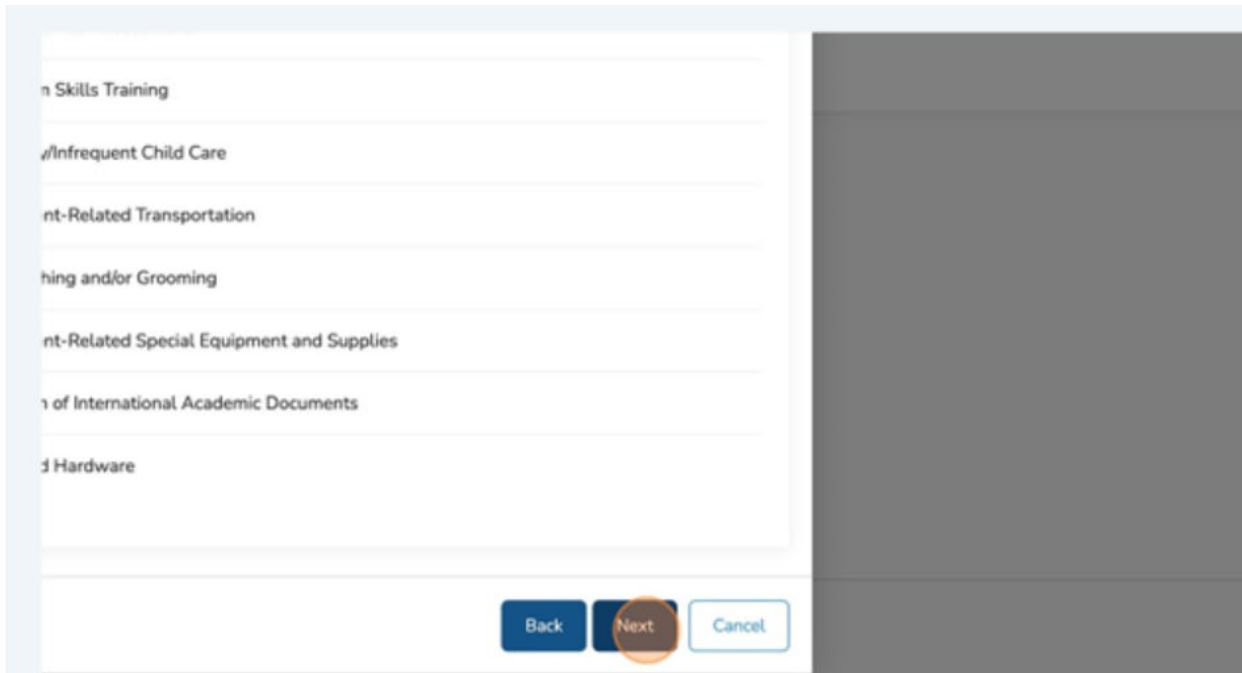
10. Select the "Planned Items" from the sub-goals you want to add.



11. Multiple Planned Items can be selected.

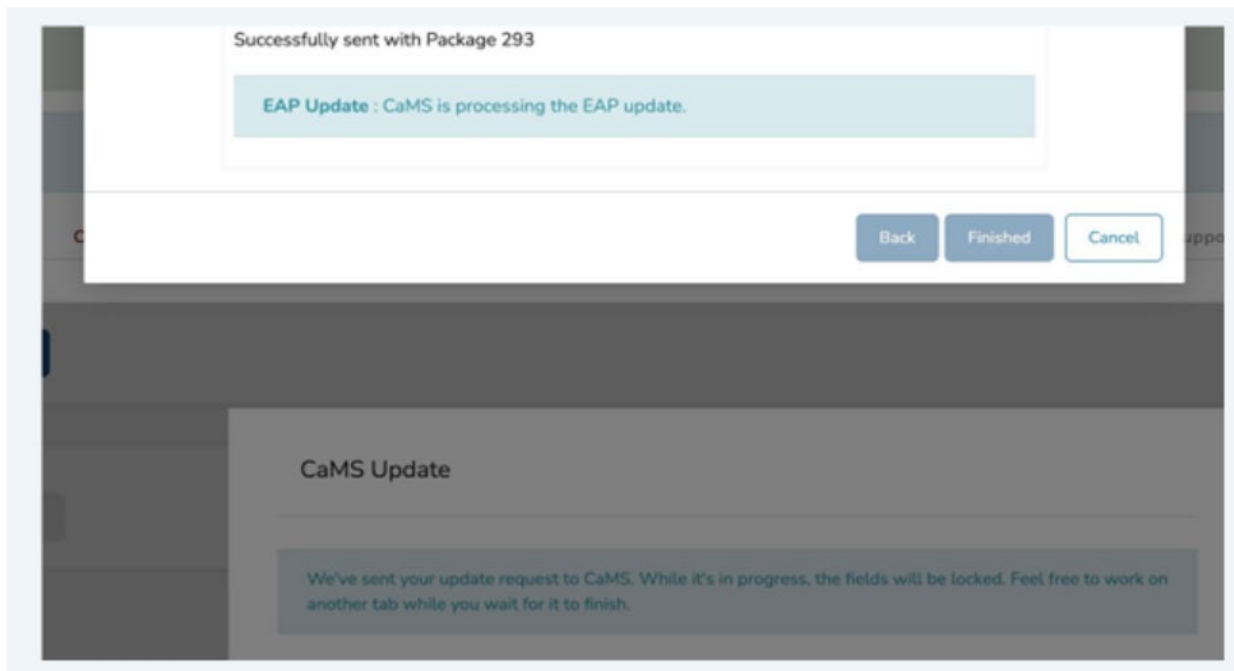


12. When all “Planned Items” have been selected, Click “Next.”



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", "1 of International Academic Documents", and "3 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.

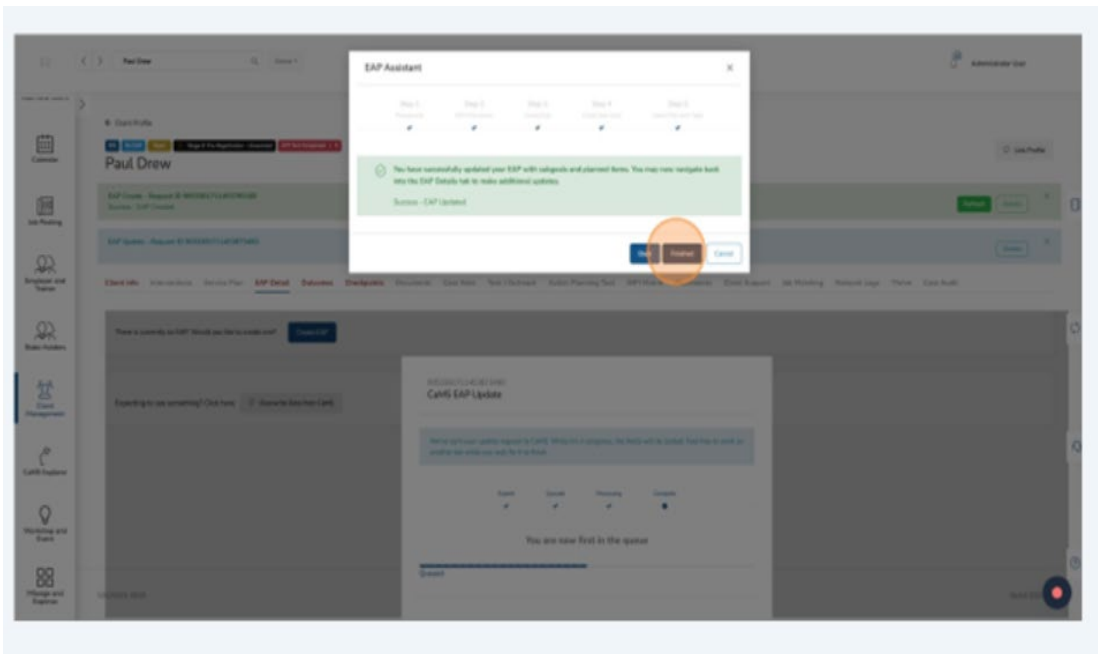
The EAP status will update to “Active” when the EAP Assistant is completed.



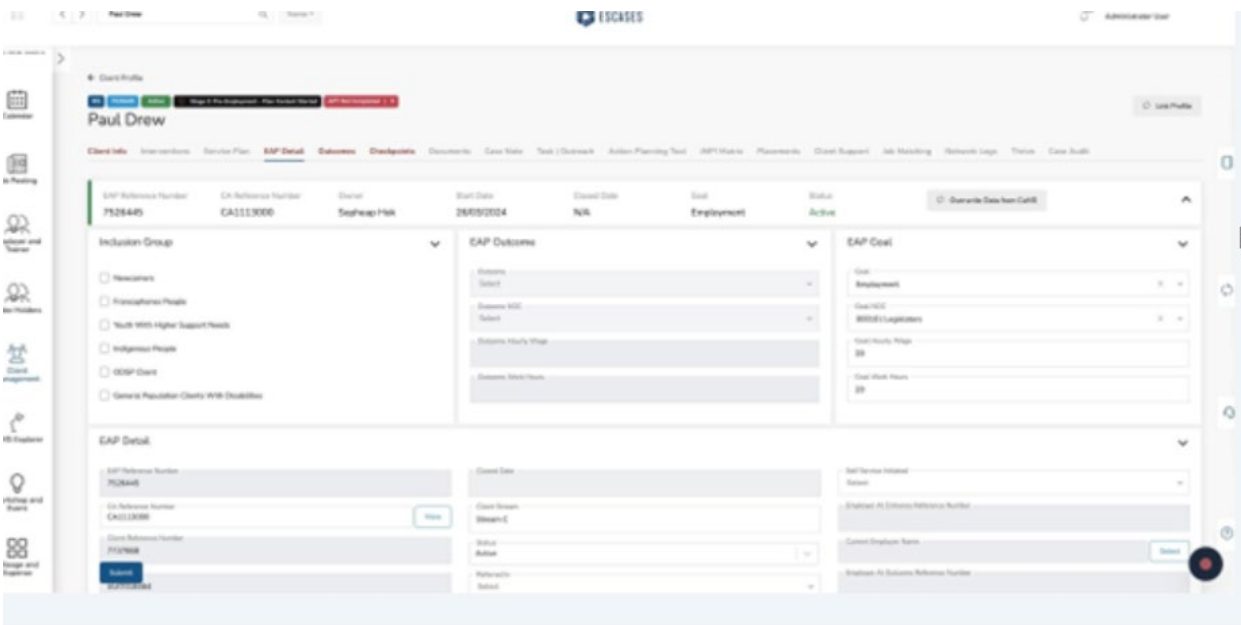
A screenshot of a web interface showing a confirmation message and a section titled "CaMS Update". The confirmation message is a light blue box with the text "EAP Update : CaMS is processing the EAP update." Above it, a white box says "Successfully sent with Package 293". Below the confirmation message are three buttons: "Back", "Finished", and "Cancel". The "CaMS Update" section has a grey background and 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."

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.



Note: additional subgoals can be added at a later date, if required by selecting the “Add New” button in the “Subgoals” section under the “EAP Detail” tab.

Subgoals + Add New

Outcome Prerequisite

The pre-employment plan items defined for the Employment Action Plan must be completed. Case status must be Active. Employment Goals must be defined.

To Add An Outcome:

- Navigate to the "Outcomes" tab. Click on the "Create Outcome" button to get started. Ensure Outcome questionnaire are completed, and all applicable responses must be defined. This includes responses to the outcome satisfaction

Additional plan items can be added at a later date, if required by selecting the “Add New” button in the “Plan Item” section under the “EAP Detail” tab.

Plan Item + Add New

Quick Guide for Financial Document Submission

- To upload documents to Cams, first submit your plan item details 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.

(12) Reactivate a Closed EAP

Preconditions:

- A new common assessment must be created, assigned, and processed (submitted into CaMS).
- A previous EAP is closed in ESCases or is closed when linked to ESCases.

The following steps are to be completed to open a new EAP:

1. Select “+EAP” tab next to the “Employment Action Plan”.

The screenshot displays a web interface for creating an Employment Action Plan (EAP). On the left, a sidebar contains navigation icons for 'Trainer', 'Holders', 'Client', and 'Client Management'. The main content area is divided into two columns. The left column shows the 'EAP Creation Date' as 22/05/2024 (33 days ago) and 'Last contact' as 22/05/2024 (32 days ago). Below this is the 'Employment Action plan' section, which includes a '+ EAP' button circled in blue. A 'Filter' icon is also visible. The right column contains a form for 'Client Detail' with fields for 'Mother's Birth Last Name', 'SAMS Member ID', 'Identify As' (set to 'Female'), 'Date of Death', 'Other Description', and 'Date of Birth' (set to 05/05/1995). A 'Submit' button is located at the bottom of the form.

The “Add New Employment Action Plan” page opens.

Add New Employment Action Plan ✕

<p>Program <input type="text" value="IES"/> ✕ ▾</p> <p>Service Plan Number <input type="text"/></p> <p>Intake Date <input type="text" value="24/06/2024"/></p> <p>Case Manager <input type="text"/></p> <p>Employer Liaison <input type="text" value="Select"/> ▾</p> <p>Job Coach/Client Success Specialist <input type="text" value="Select"/> ▾</p>	<p>Status <input type="text" value="Open"/> ✕ ▾</p> <p>Site ID <input type="text" value="4614A"/> ✕ ▾</p>
---	---

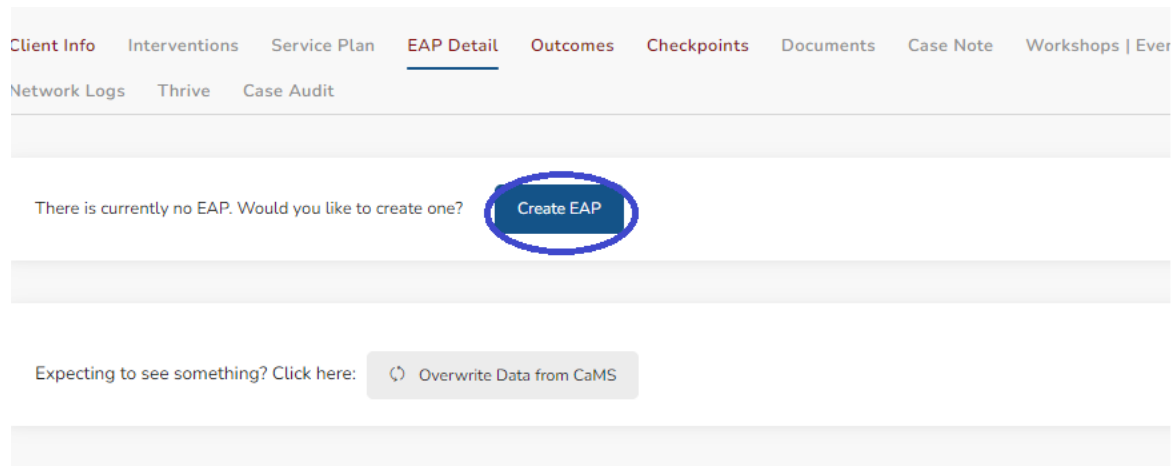
2. Ensure the Site ID is correct.

3. Click “Submit.”

Add New Employment Action Plan ✕

<p>Program <input type="text" value="IES"/> ✕ ▾</p> <p>Service Plan Number <input type="text"/></p> <p>Intake Date <input type="text" value="24/06/2024"/></p> <p>Case Manager <input type="text"/></p> <p>Employer Liaison <input type="text" value="Select"/> ▾</p> <p>Job Coach/Client Success Specialist <input type="text" value="Select"/> ▾</p>	<p>Status <input type="text" value="Open"/> ✕ ▾</p> <p>Site ID <input type="text" value="4614A"/> ✕ ▾</p>
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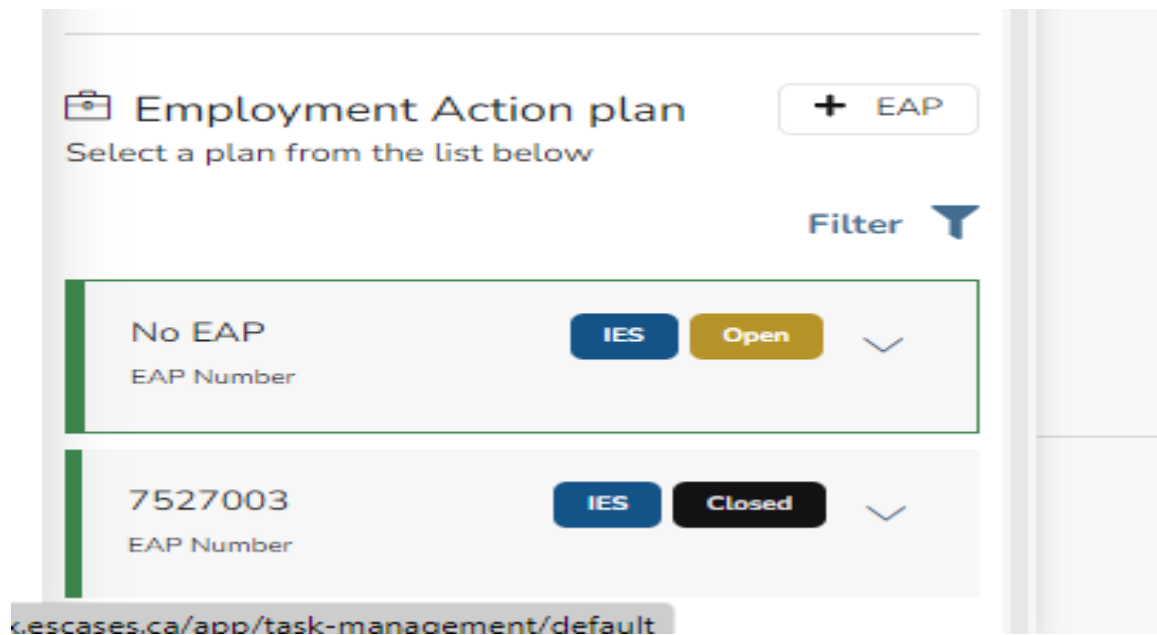
4. Click on the “EAP Detail” tab and select “Create EAP”.



The EAP assistant is displayed.

5. Follow the steps to create an EAP as outlined under the section : Create EAP, Sub-Goal, Planned Item with the EAP Assistant.

Closed EAP’s can be viewed and accessed under the “Employment Action Plan” section on the left.

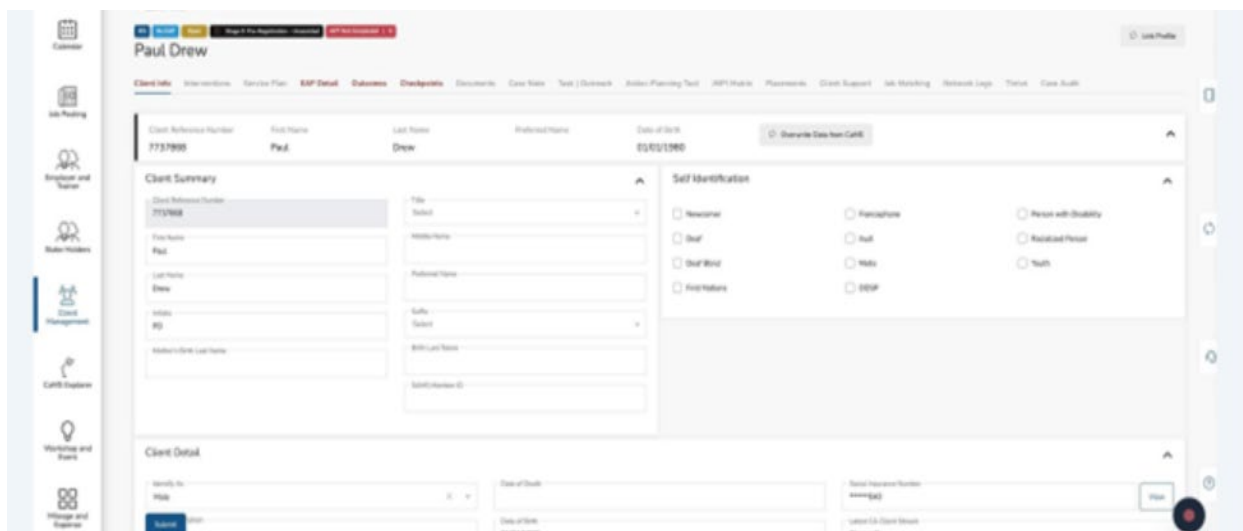


(13) Upload a Document and Complete a Financial Support Planned Item

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.

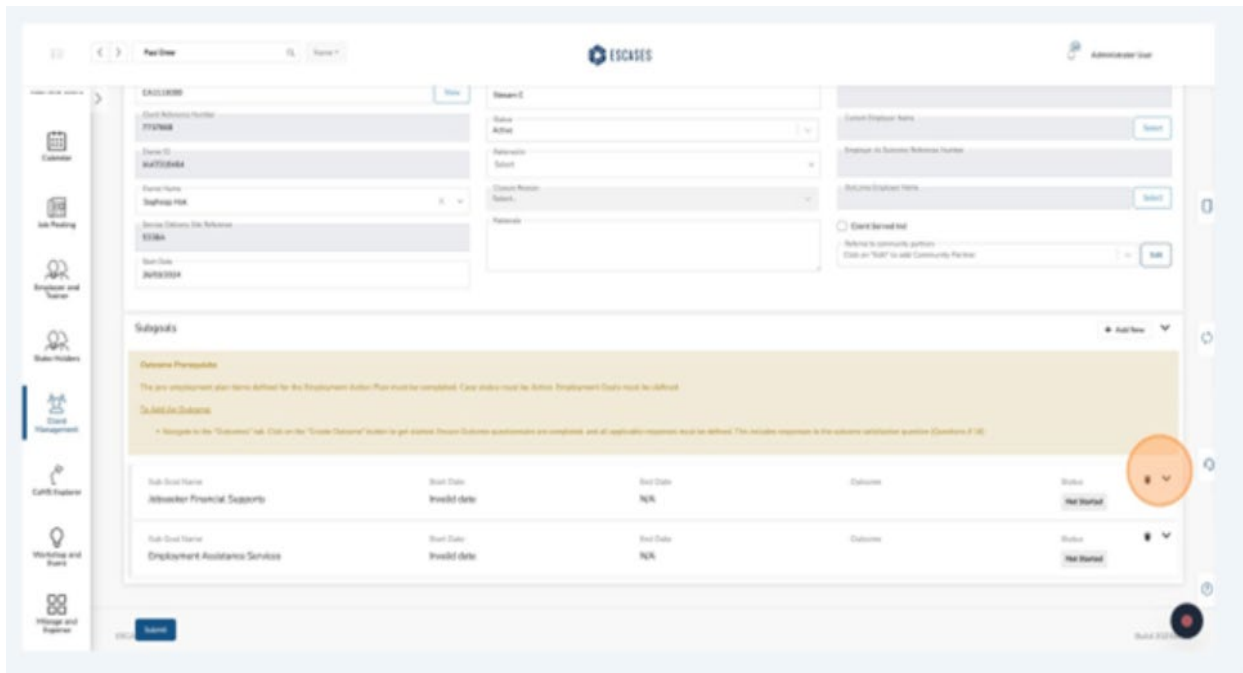
1. Navigate to the client profile.



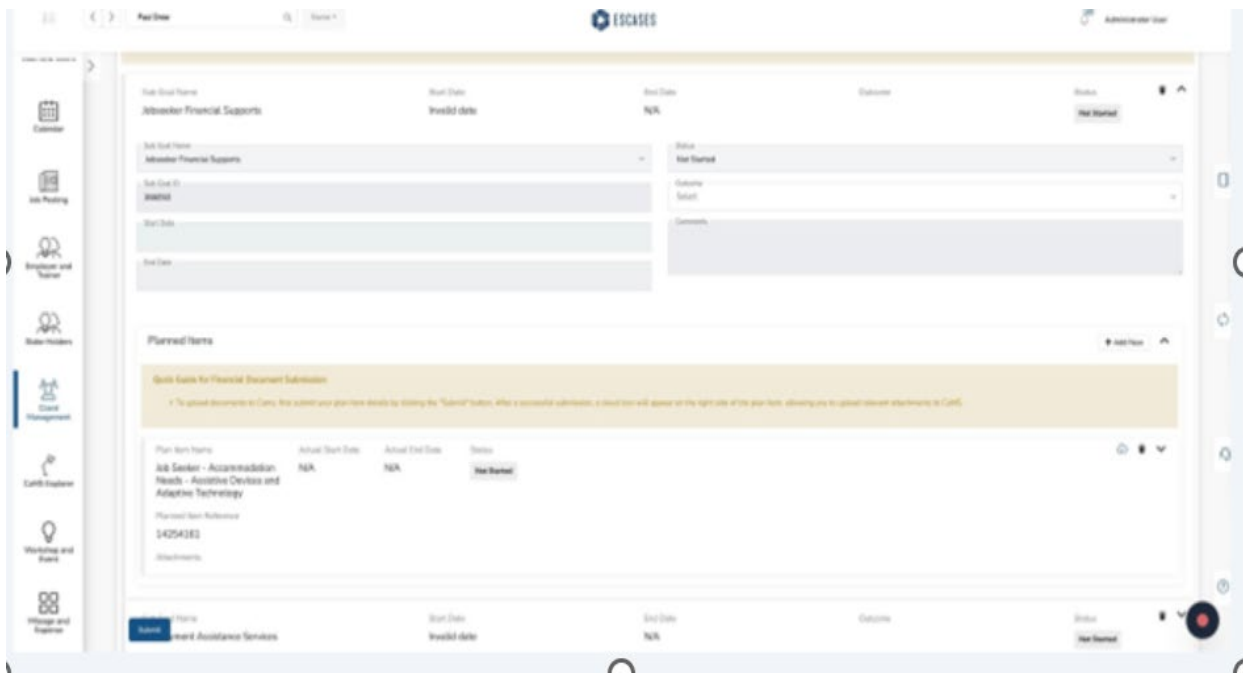
2. Click "EAP Detail."



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



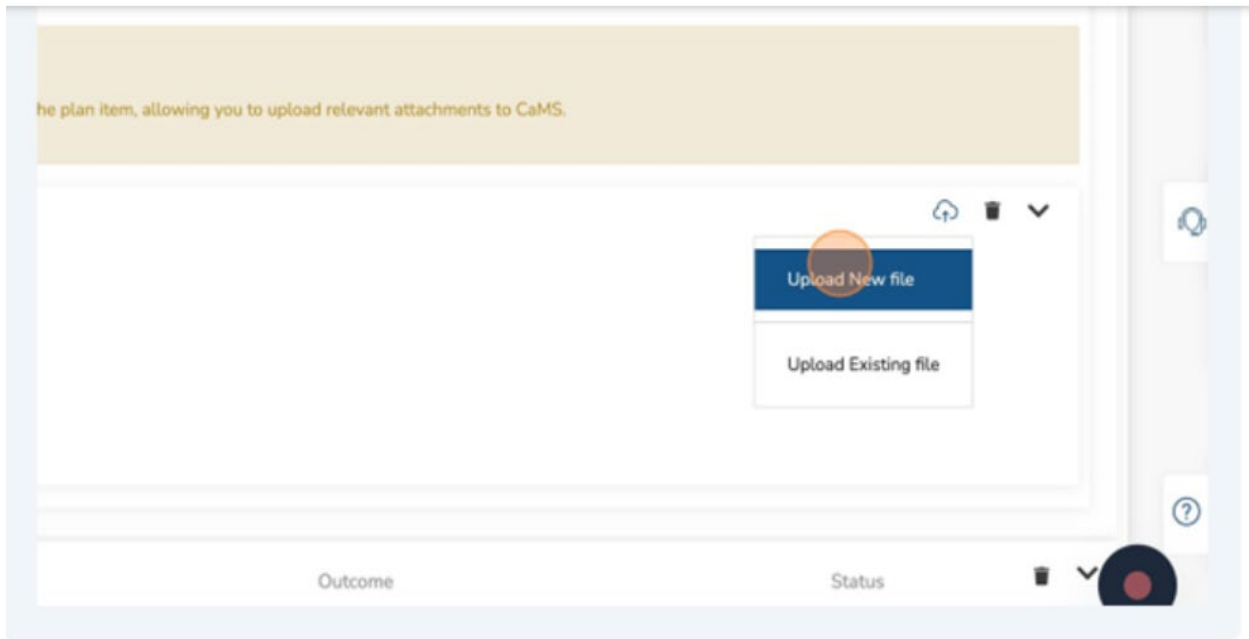
4. The "Cloud" icon will display once the Planned Item is exposed.



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.

The screenshot shows a modal window titled "Upload document" with a close button (X) in the top right corner. The form contains three main sections: "Document Type" with a dropdown menu showing "Receipt" and a clear button (X); "Tags" with a dropdown menu showing "Select"; and "Description" with a text input field. Below the text field is a blue button labeled "Select Files" with a cloud icon, which is highlighted by a dashed blue border. Below the button is a large area with a cloud icon and the text "Drop files here".

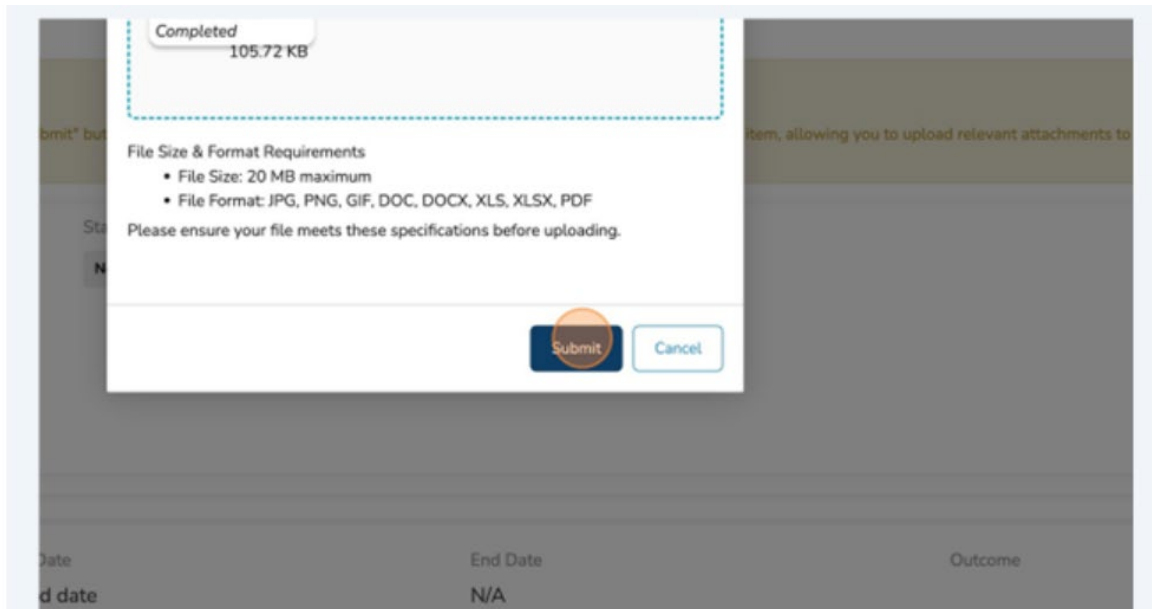
8. Insert the description for this attachment.

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

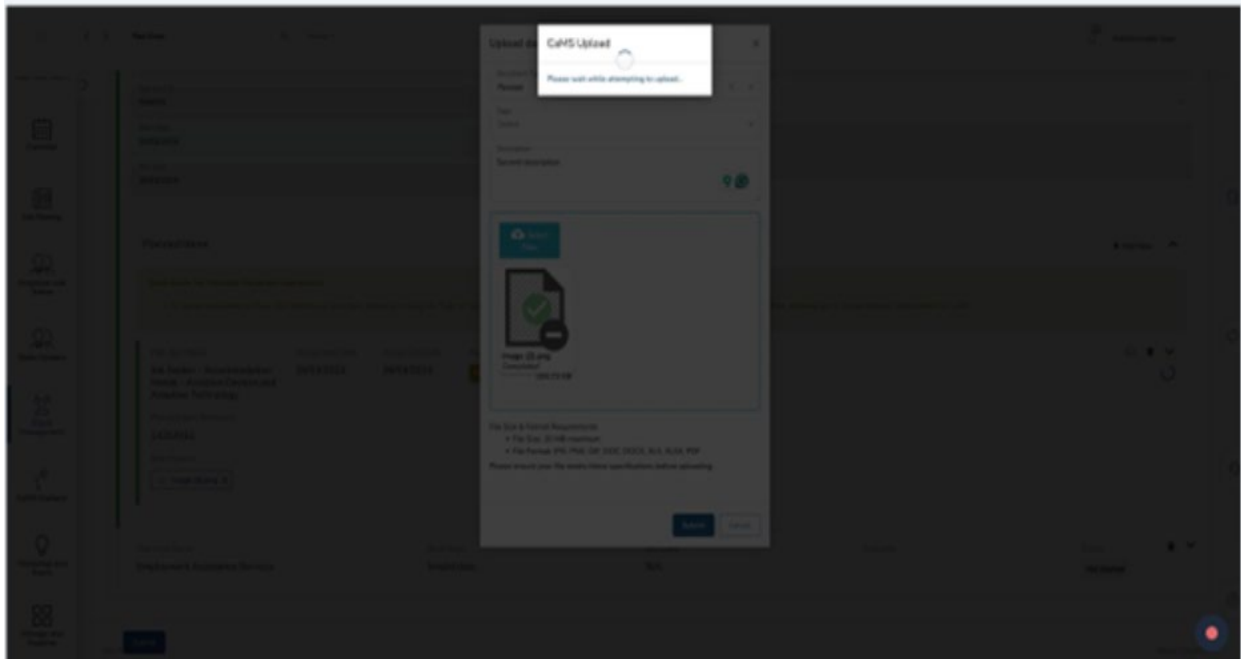
9. Click “Select Files” and choose the attachment for this planned item.

This screenshot shows the same "Upload document" dialog box, but the "Description" field is now populated with the text: "This description is important as it will accompany your attachment directly in CaMS." To the right of the text are two small circular icons: a lightbulb and a speech bubble. The "Select Files" button remains highlighted with a dashed blue border.

10. Click "Submit."

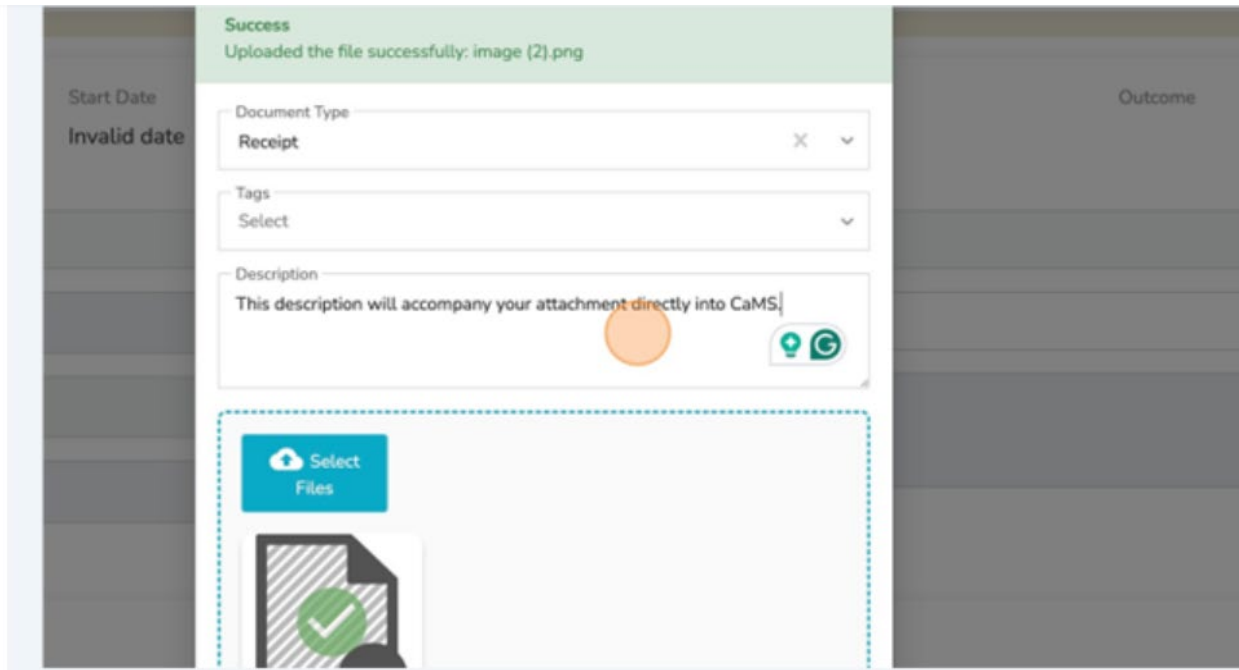


When the CaMS Upload begins, the entire screen focus will highlight the action.

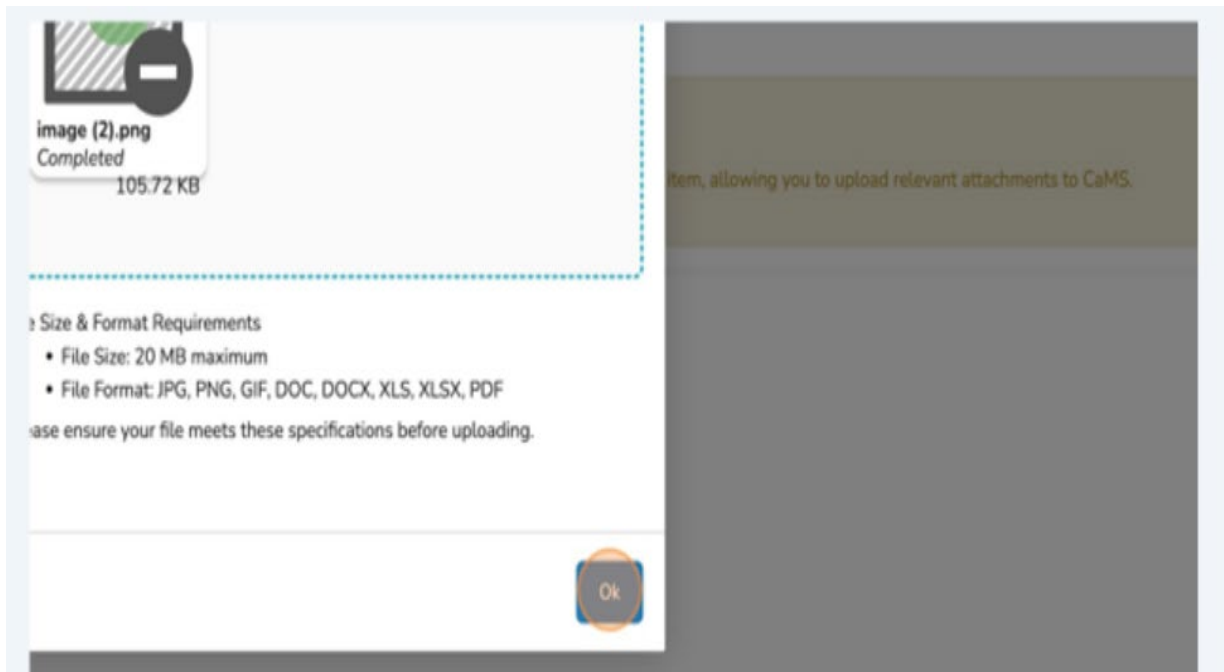


- Alert! While the upload is occurring directly into CaMS, the screen will display a primary focus on this action to signify the importance.

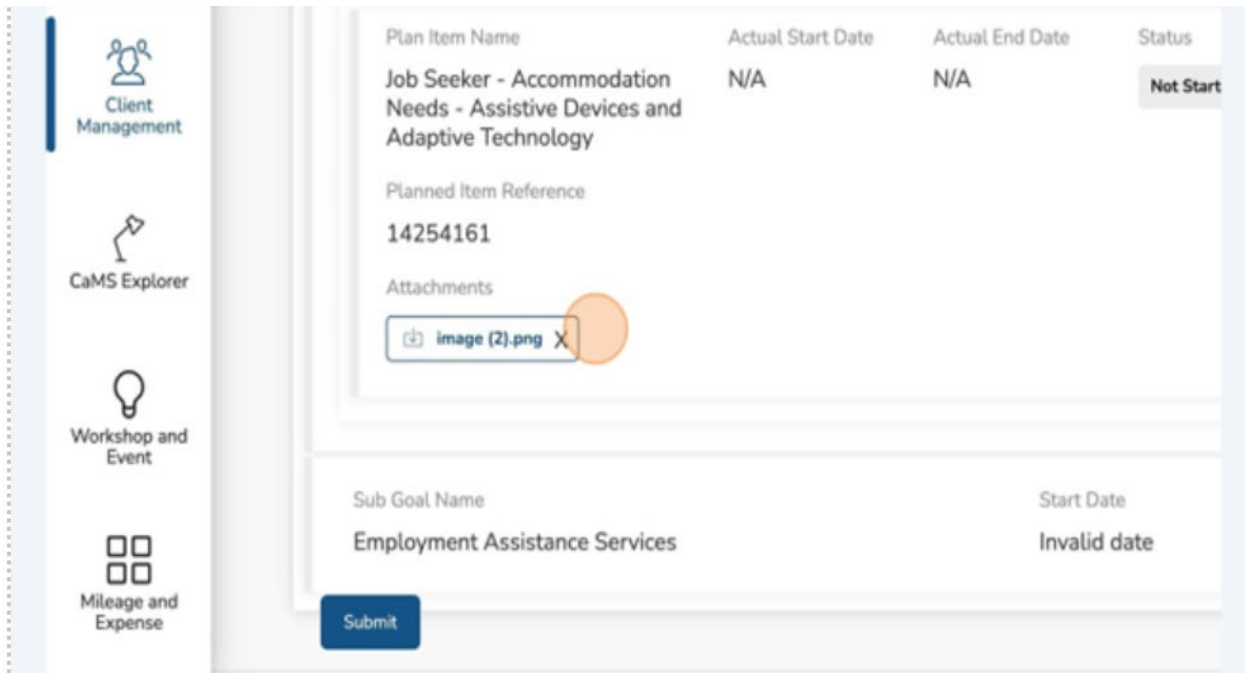
11. A “success” notification will display when the file is uploaded into CaMS.



12. Click “OK.”



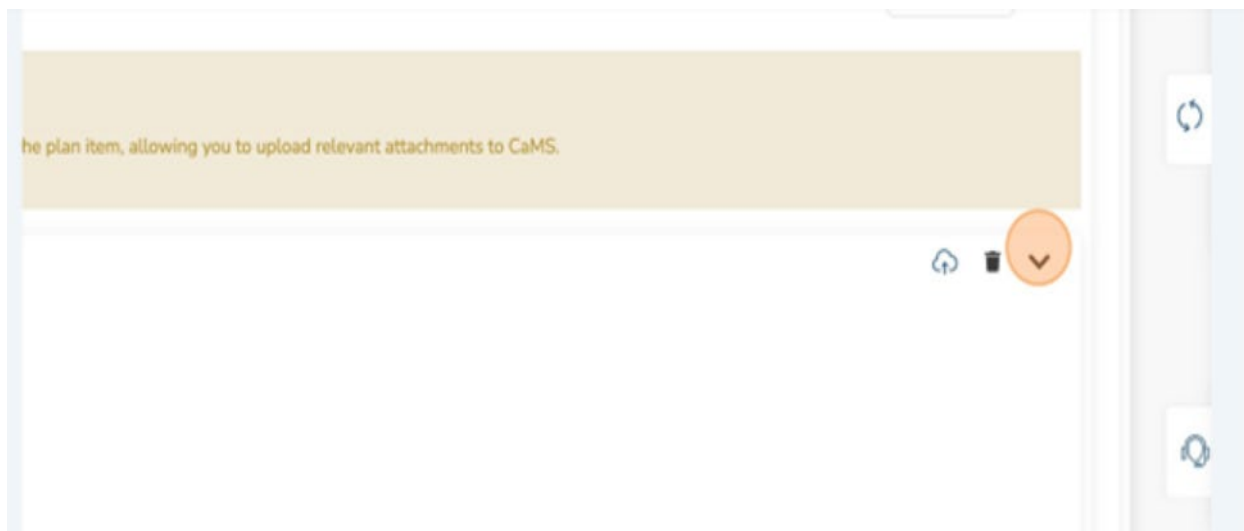
The new attachment can be seen in the Attachments section.



✓ 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 several empty input fields. On the right, the form is divided into 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.

The screenshot shows the same form as above, but with the 'Caseworker' field now showing a list of options. The option 'Sopheap Hok' is highlighted in blue, and an orange circle is placed over it. The other fields remain the same: 'Service Delivery Site Reference' is '5338A', 'Outcome' is 'Select', and 'Status' is 'Not Started'. At the bottom right, 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

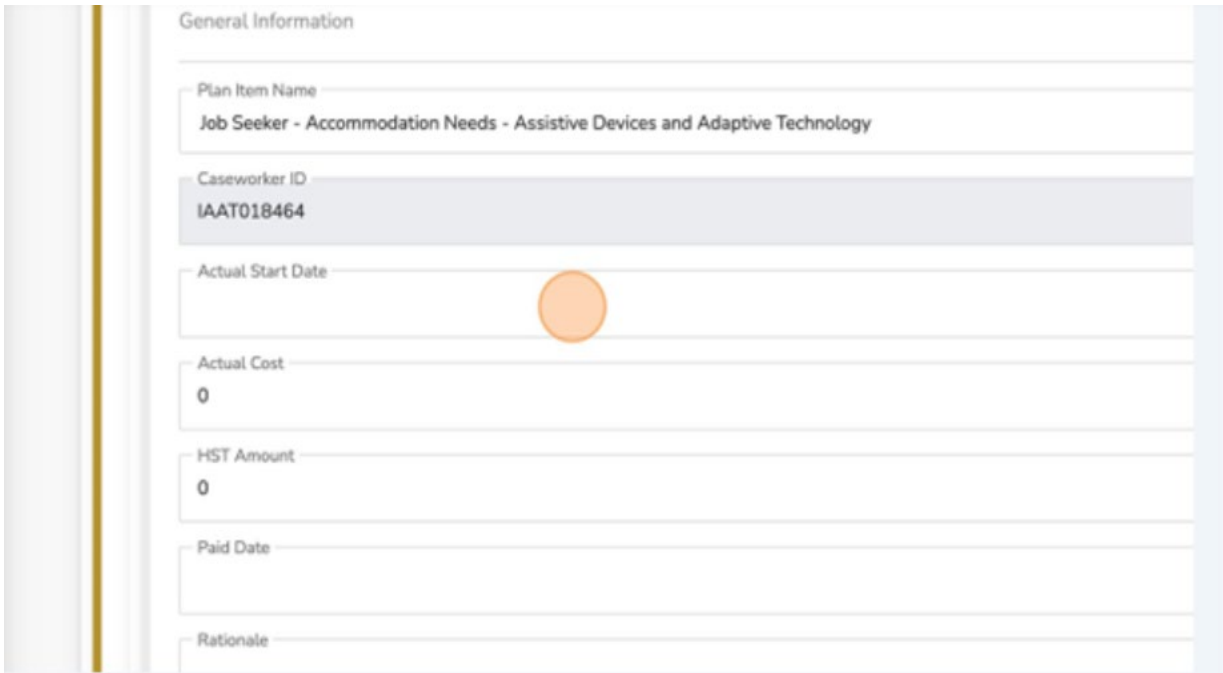
Actual Start Date

Actual Cost
0

HST Amount
0

Paid Date

Rationale



5. Select the appropriate “Start Date.”

Client Management

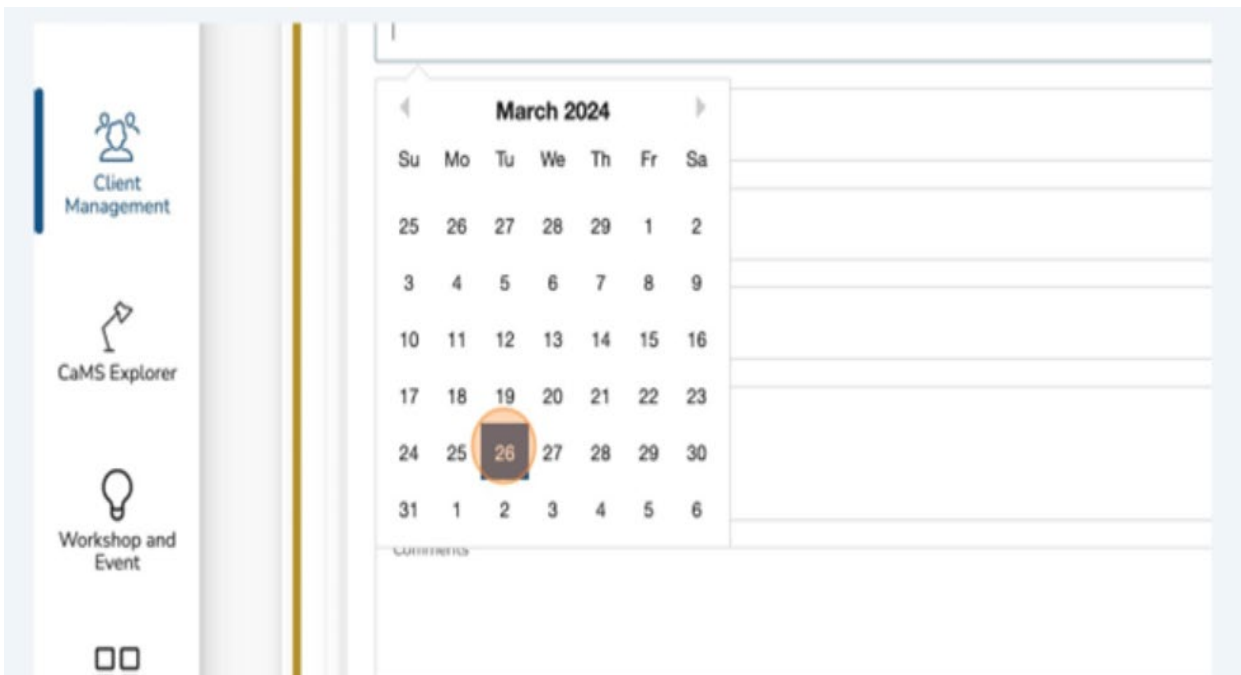
CaMS Explorer

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, including a search bar with an 'X' icon and a dropdown arrow.

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 columns and dates as rows. The date 26 is highlighted with an orange circle. The calendar is overlaid on a form with several empty input fields.

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
25	26	27	28	29		
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: 'er and ver', 'olders', 'nt ment', and '>'. The main content area contains a form with 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 (highlighted with an orange circle)
- HST Amount: 0
- Paid Date: (empty)

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', 'ient gement', 'Explorer', and 'shop and vent'. The main content area contains a form with the following fields:

- IAAT018464 (header)
- Actual Start Date: 26/03/2024
- Actual Cost: 0
- HST Amount: 0 (highlighted with an orange circle)
- Paid Date: (empty)
- Rationale: (empty)
- Comments: (empty)

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' (with a spider icon), 'Client Management' (with a person icon), 'CaMS Explorer' (with a magnifying glass icon), and 'Workshop and Event' (with a lightbulb icon). The 'Client Management' item is highlighted with a blue bar. The main area displays a calendar for March 2024, with the date '26' selected and 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, which is currently empty.

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 main area displays a calendar for March 2024, with the date '26' selected and 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, which is currently empty.

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'.

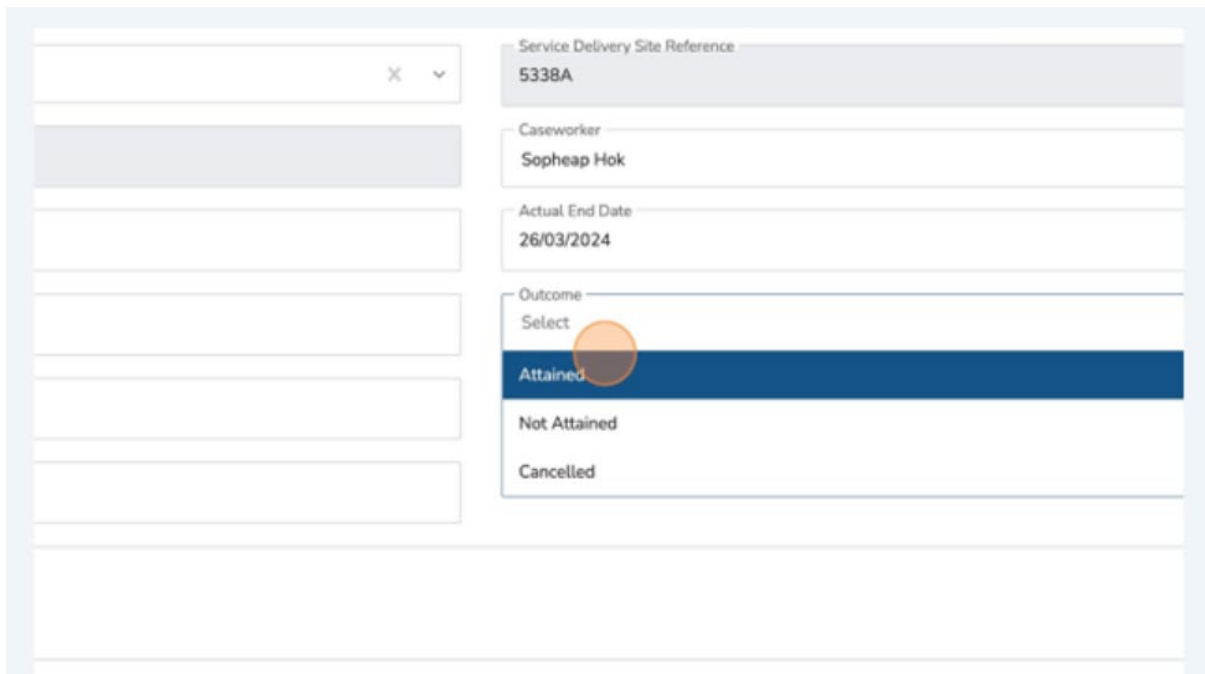
15. Insert the appropriate “Rationale.”

- ✓ 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 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: '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), and 'Status' with the value 'Completed'. There is also a checkbox labeled 'Ready for Review' which is currently unchecked.

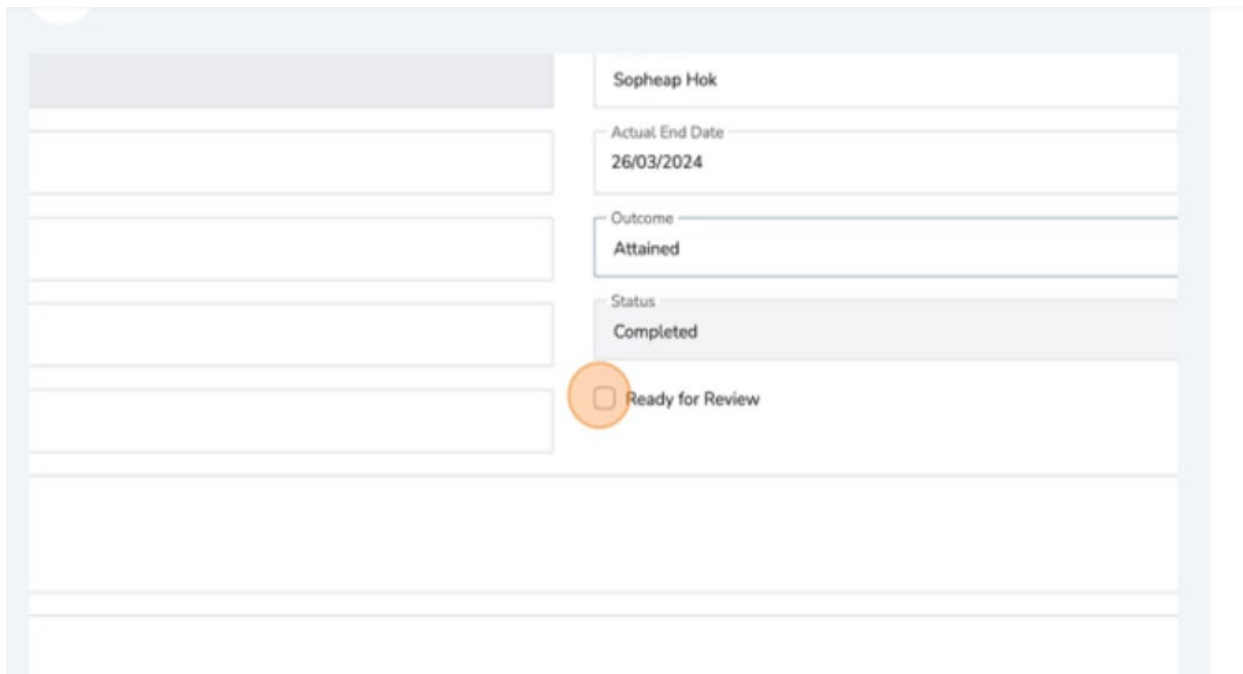
17. Select the appropriate "Outcome."



The screenshot shows a form with several fields. On the right side, the following information is displayed:

- 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 a red circle), Not Attained, and Cancelled.

18. Click the "Ready for Review" checkbox.



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

- The 'Outcome' dropdown is now closed, and the text 'Attained' is displayed in the field.
- The 'Status' field is set to 'Completed'.
- The 'Ready for Review' checkbox is now visible and highlighted with a red circle.

19. Click "Submit."

The screenshot shows a web form with a sidebar on the left containing four menu items: 'Client Management' (with a person icon), 'CaMS Explorer' (with a magnifying glass icon), 'Workshop and Event' (with a lightbulb icon), and 'Mileage and Expense' (with a grid icon). The main form area contains several input fields: 'Actual Start Date' with the value '26/03/2024', 'Actual Cost' with '100', 'HST Amount' with '0', 'Paid Date' with '26/03/2024', and 'Rationale' with the text 'A rationale for this particular client support.'. A 'Comments' field is also present but empty. A blue 'Submit' button is located at the bottom left of the form, with an orange circle highlighting it.

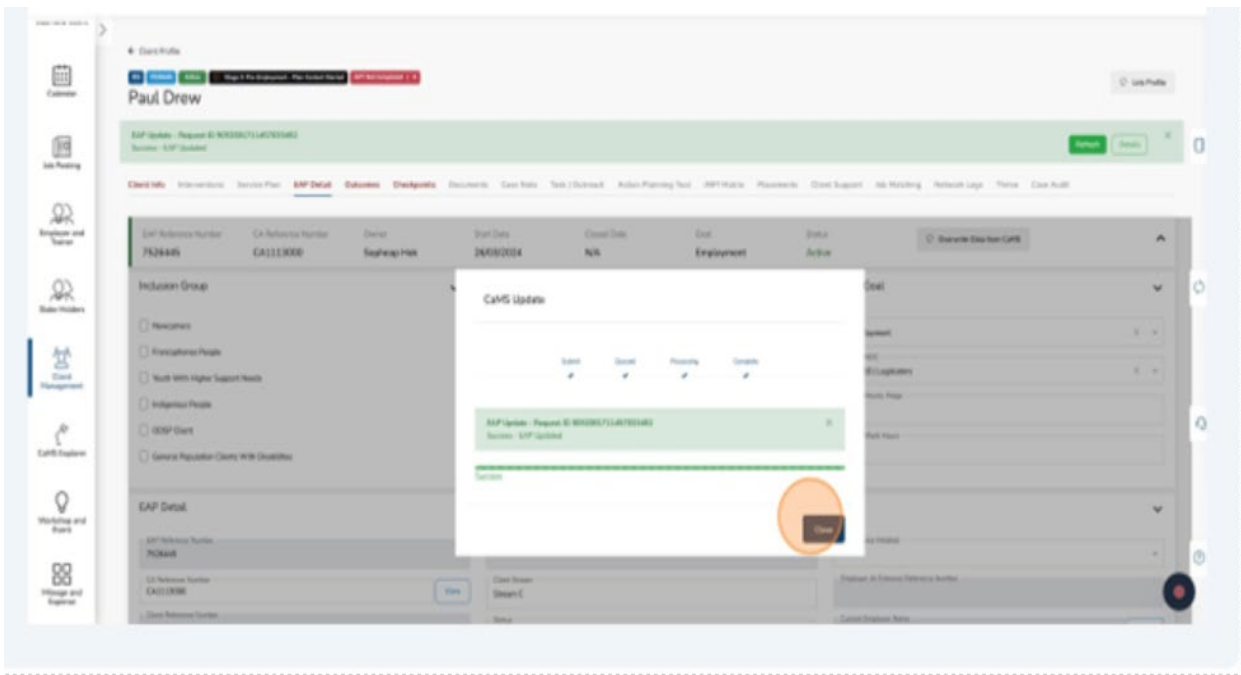
The planned item will be uploaded in CaMS. You will be placed in queue while the upload takes place.

The screenshot shows a progress bar for a 'CaMS Update'. At the top, a table displays the following information:

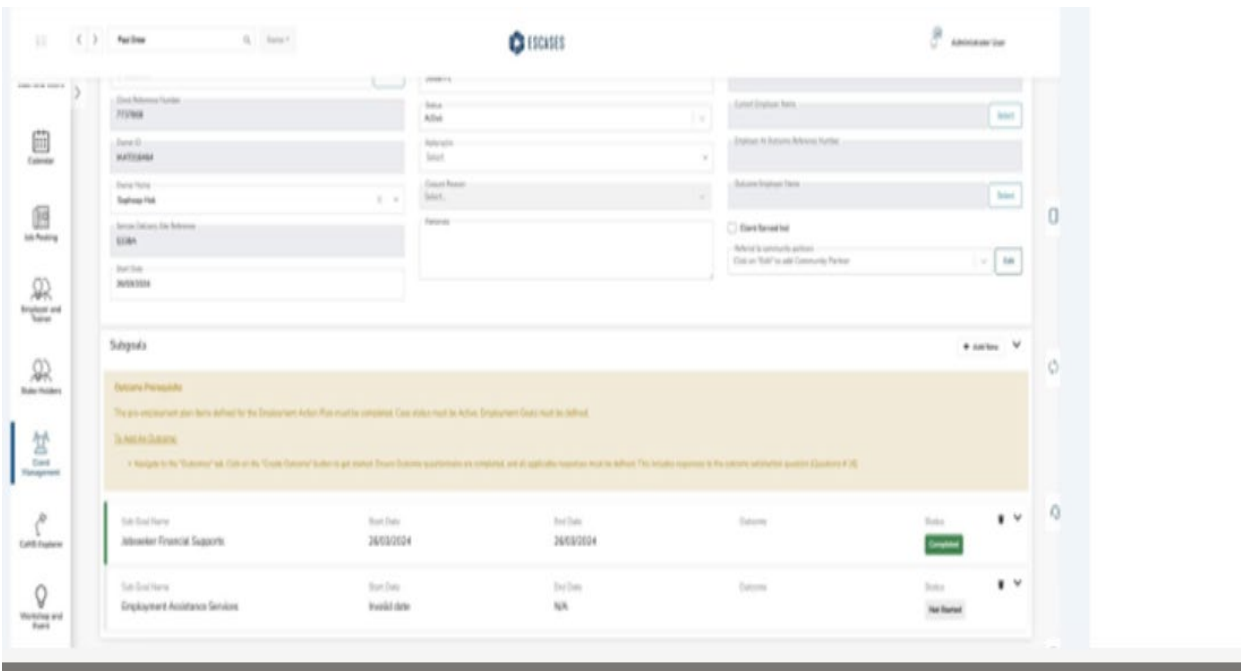
	Start Date	Closed Date	Goal	Status
p Hok	26/03/2024	N/A	Employment	Active

Below the table, the 'CaMS Update' section features a light blue message box: "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." An orange circle highlights the word "While". Below the message is a progress bar with four stages: 'Submit' (checked), 'Queued' (active), 'Processing', and 'Complete'. Below the progress bar, the text "You are now first in the queue" is displayed. At the bottom left, the word "Submitted" is shown next to a blue progress bar.

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

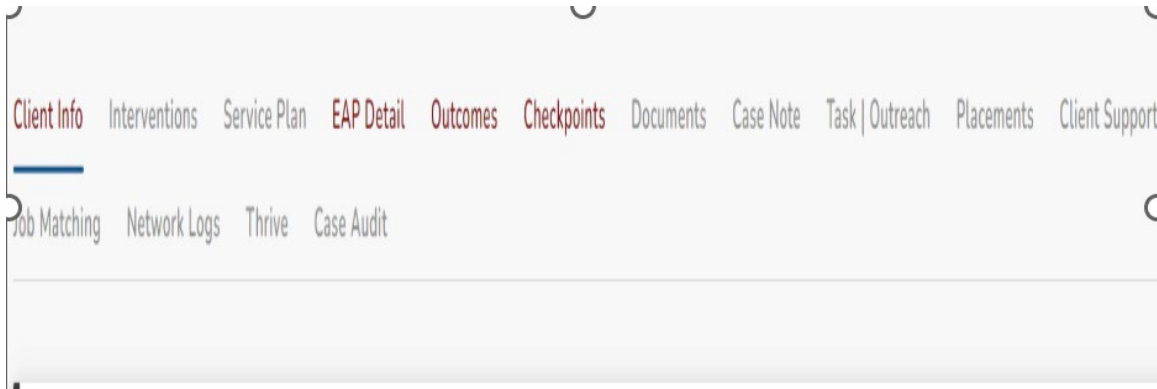


The page will refresh with your submission processed by CaMS.



(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 at the top left. The form contains the following fields and controls:

- EAP Reference Number:** 7526990
- Closed Date:** (Empty field)
- Self Service Initiated:** Select (dropdown menu)
- CA Reference Number:** CA1113260 (with a 'View' button)
- Client Stream:** Stream A
- Employer At Entrance Reference Number:** (Empty field)
- Client Reference Number:** 7738410
- Status:** Active (dropdown menu)
- Current Employer Name:** (Empty field with a 'Select' button)
- Owner ID:** IAAT019158
- Referred In:** EO - Employment Service Provider (dropdown menu with an 'X' icon)
- Employer At Outcome Reference Number:** (Empty field)

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:

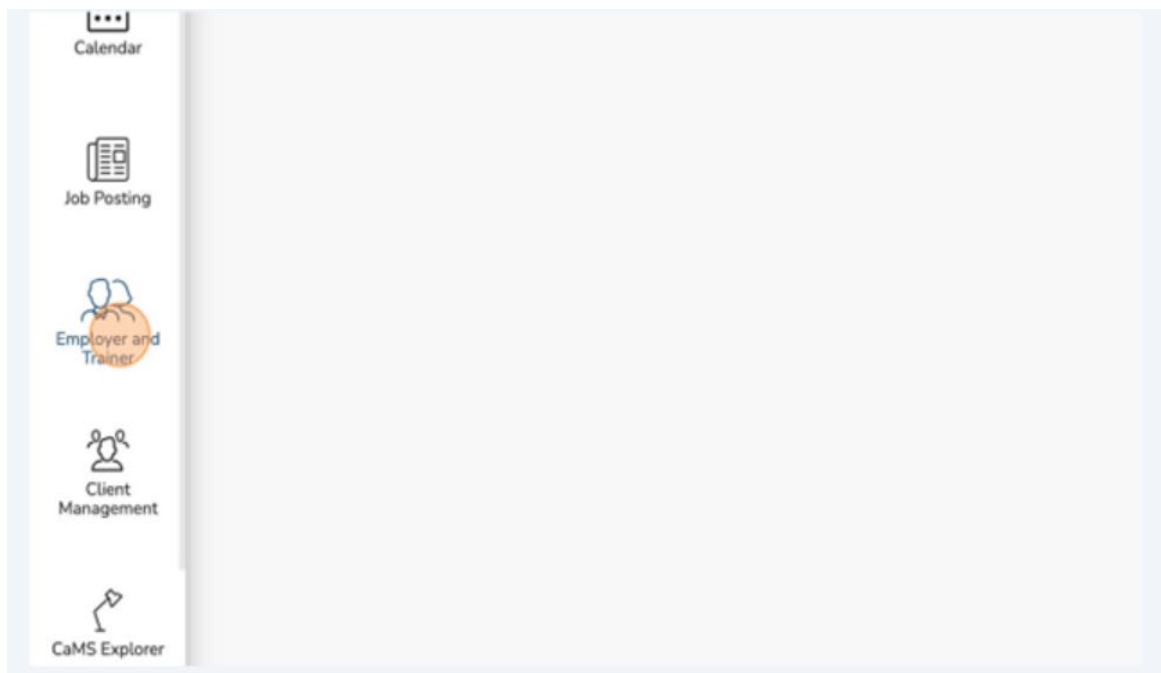
- Search ... (input field)
- Close Reason: Select... (dropdown menu)
- Closure Rationale (1000 char. max): (text area)
- Submit (button)
- Cancel (button)

5. Select a "Closure Reason."

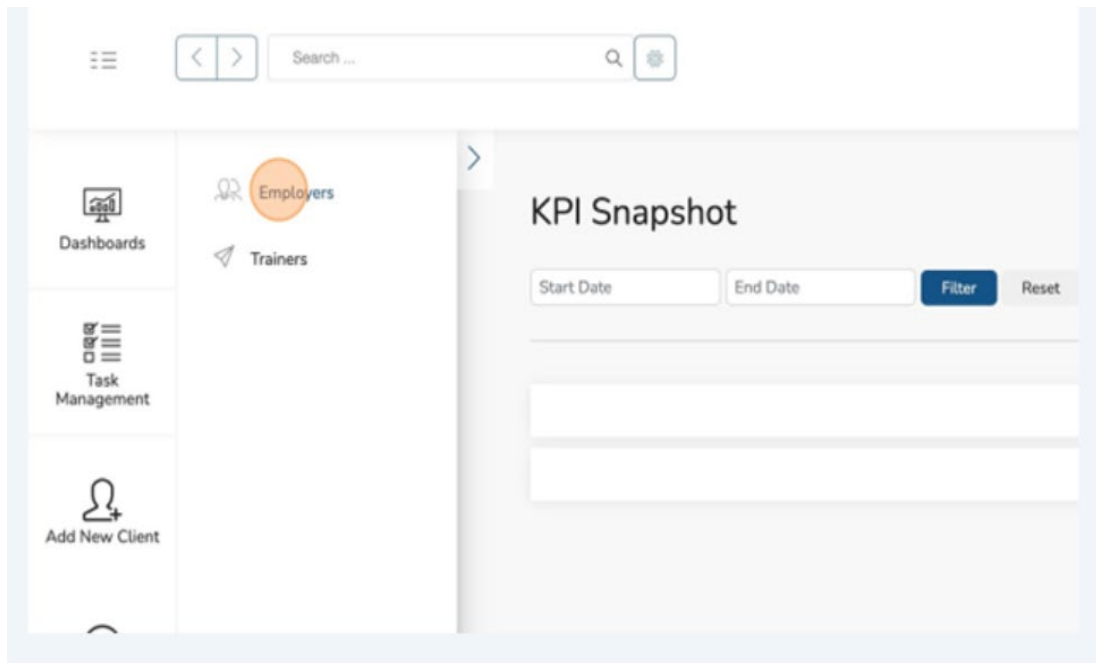
(15) Add a New Employer

- 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 or Q3 of 2024
- ✓ Note: Section “Linking an Employer in CaMS” will document the steps to find the employer reference number in CaMS.

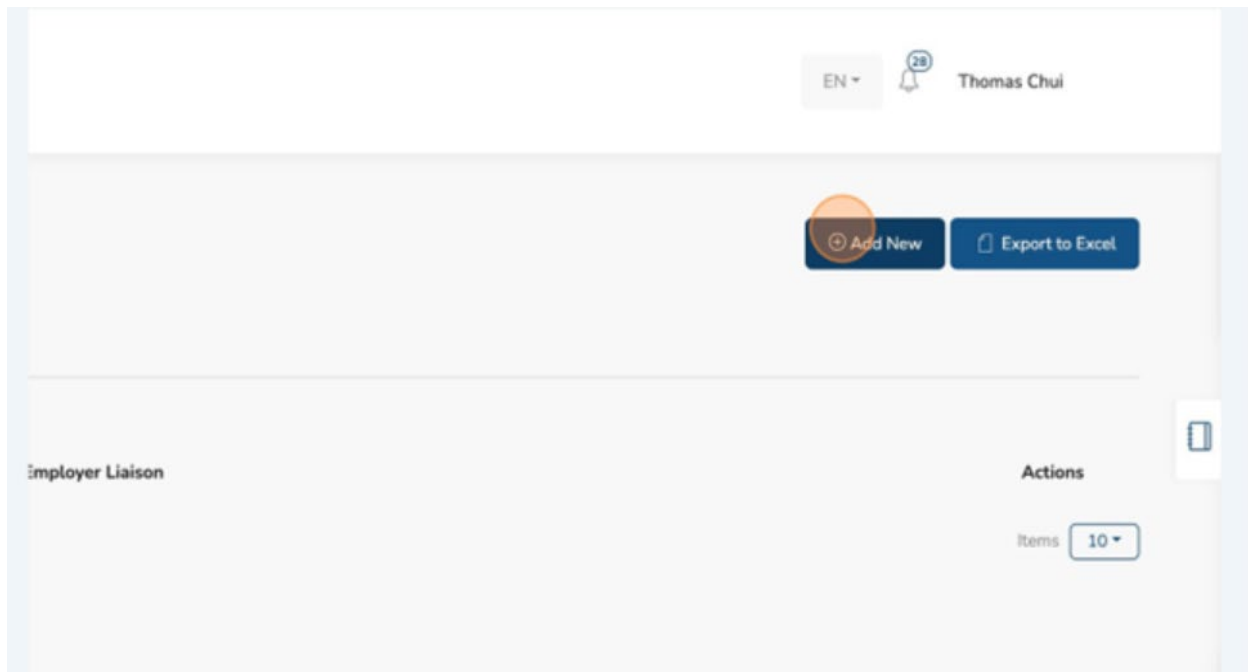
1. Navigate to ESCases navigation bar.
2. Click “Employer and Trainer” in the left Navigation window.



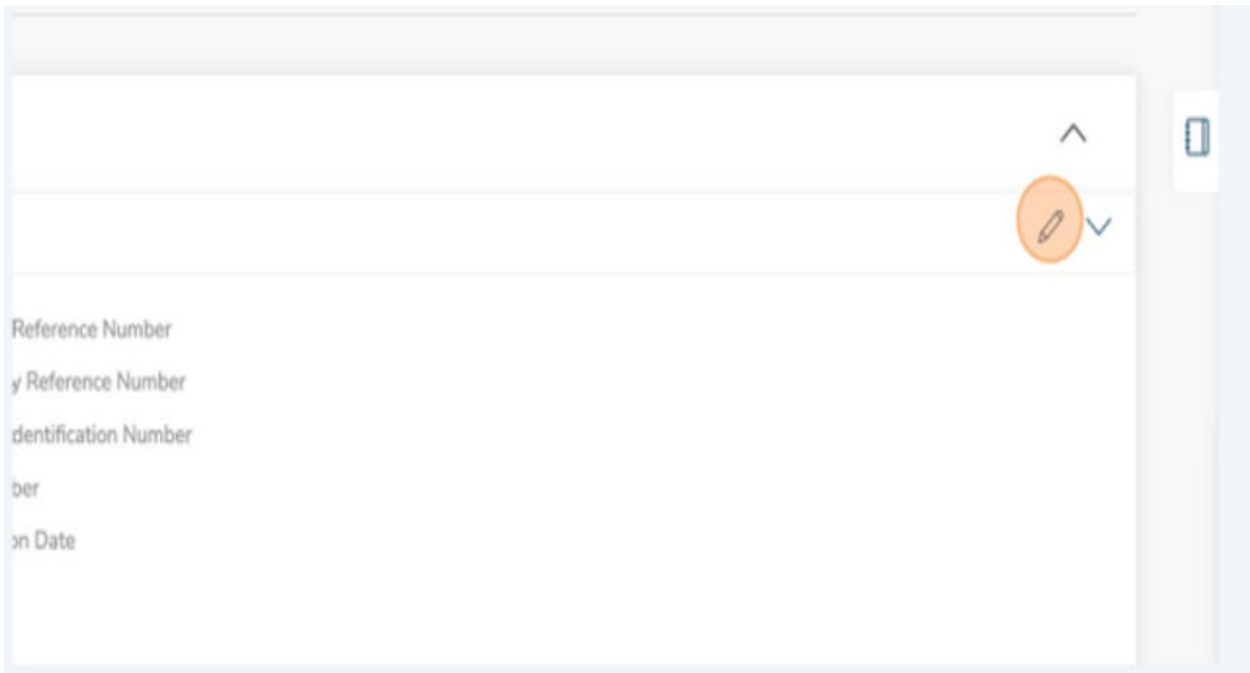
3. Click “Employers.”



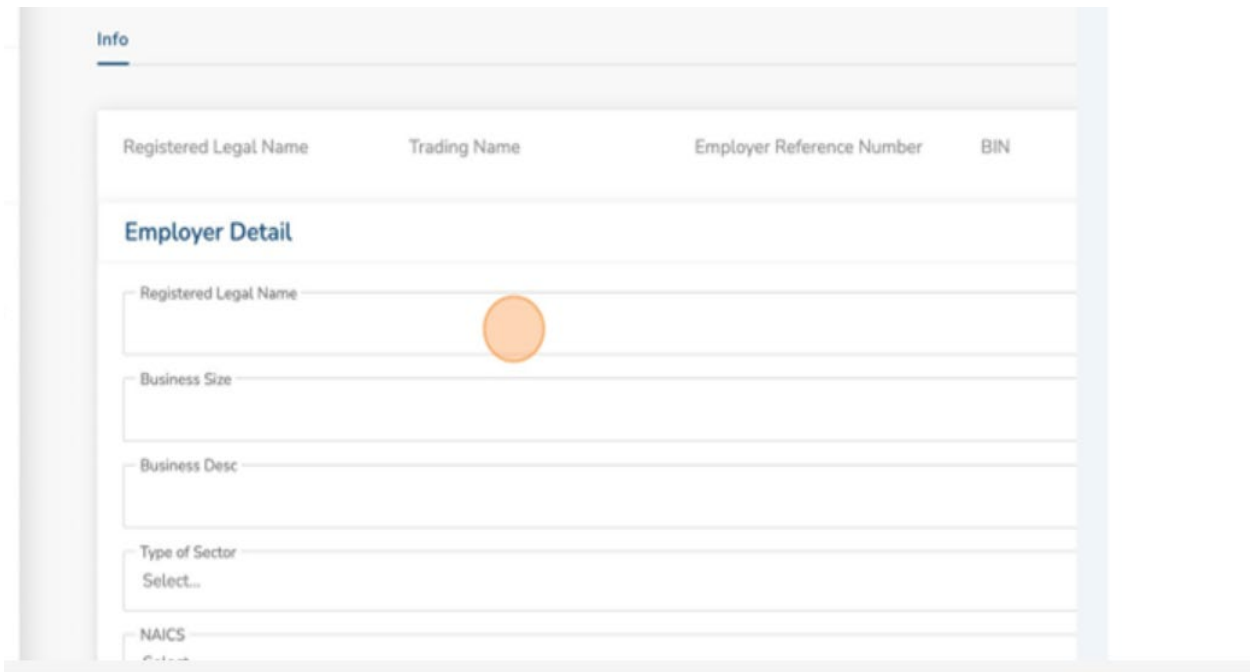
4. Click “Add New.”



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."

The screenshot shows a web application interface with a sidebar on the left and a main content area. The sidebar contains four menu items: "Employer and Trainer" (highlighted with a blue bar), "Client Management", "CaMS Explorer", and "Workshop and Event". The main content area is titled "Assign to" and contains a "Users" dropdown menu with "Select..." text. Below the dropdown is a blue "Submit" button.

You have now successfully created a new employer profile.



The screenshot shows a web application interface for creating an employer profile. The page is titled "Employer" and has a sidebar on the left with various navigation icons. The main content area is divided into several sections: "Employer Detail" (with fields for Name, Address, Phone, Email, etc.), "Contact" (with fields for Address, Email, Phone), and "Employer" (with a dropdown menu). There is a blue "Submit" button at the bottom left of the form.

(16) 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"/>

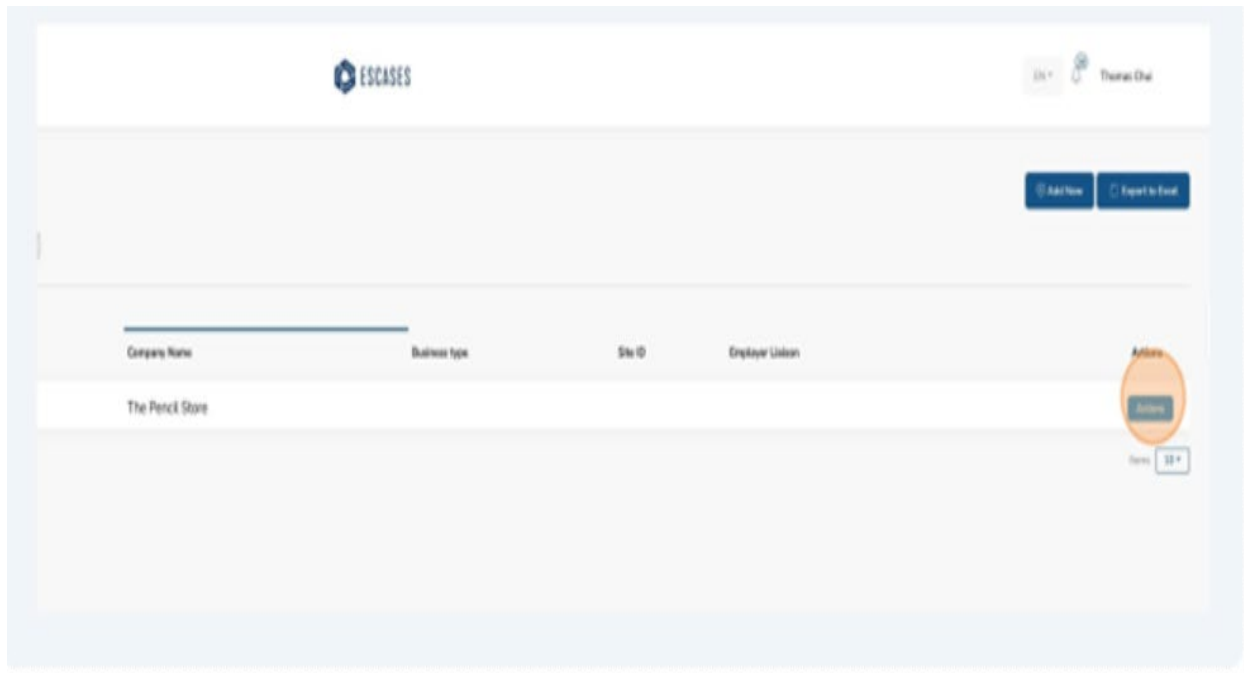
Search Results (Number of Items: 4 out of 4) ▼

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

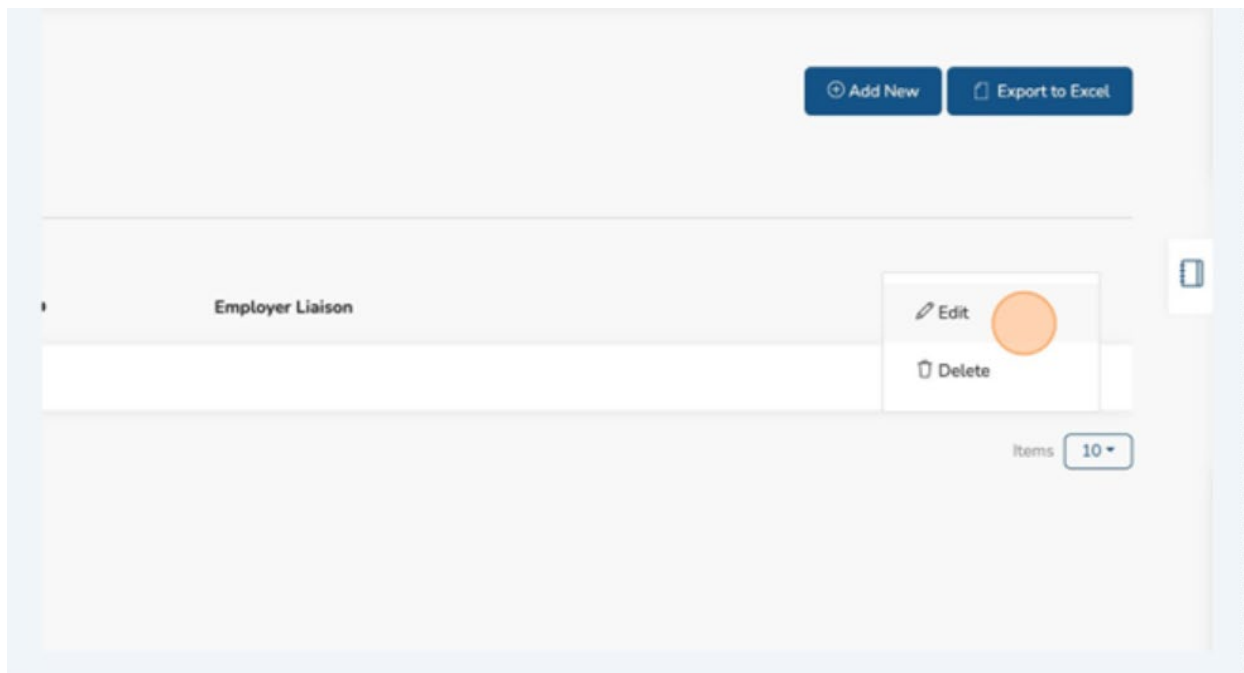
- Alert! A new version of this is currently being developed and should be live in Q2 of 2024 where full two-way syncing will be implemented.

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

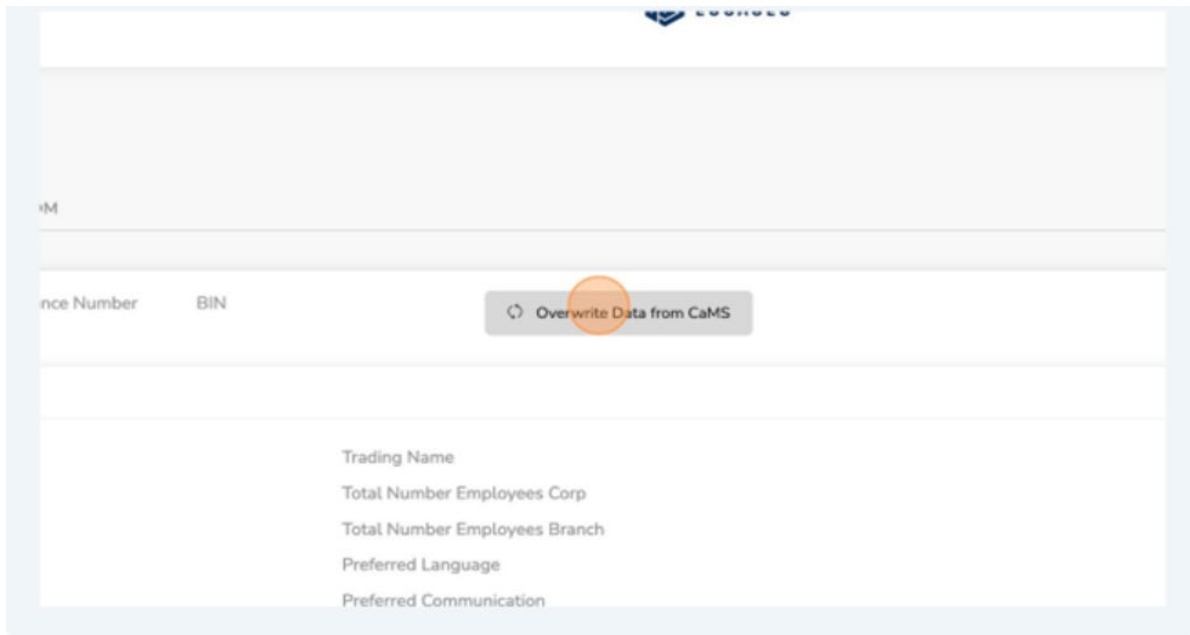
1. Click "Actions."



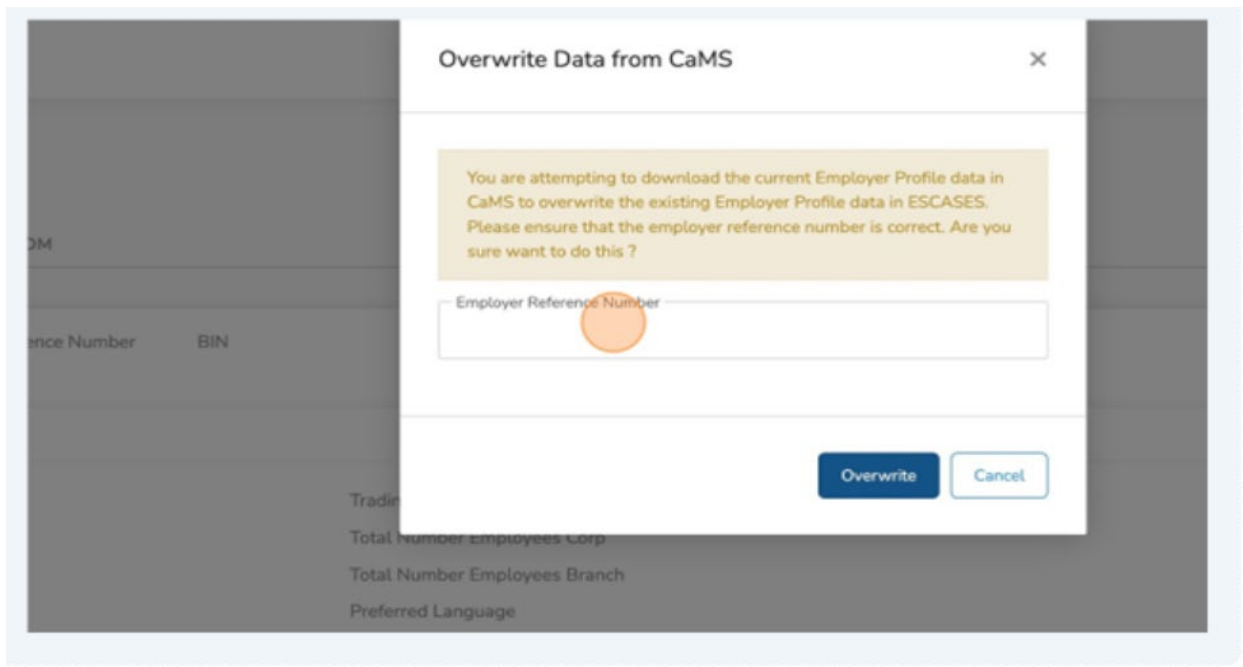
2. Click "Edit."



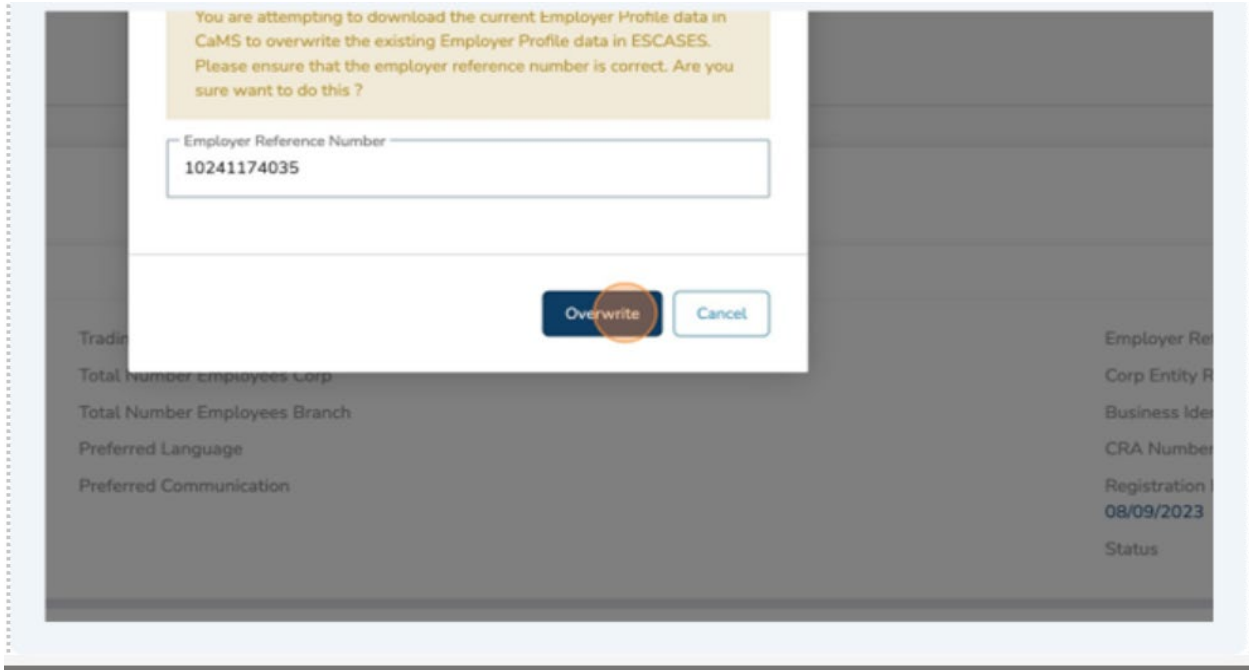
3. Click "Overwrite Data from CaMS."



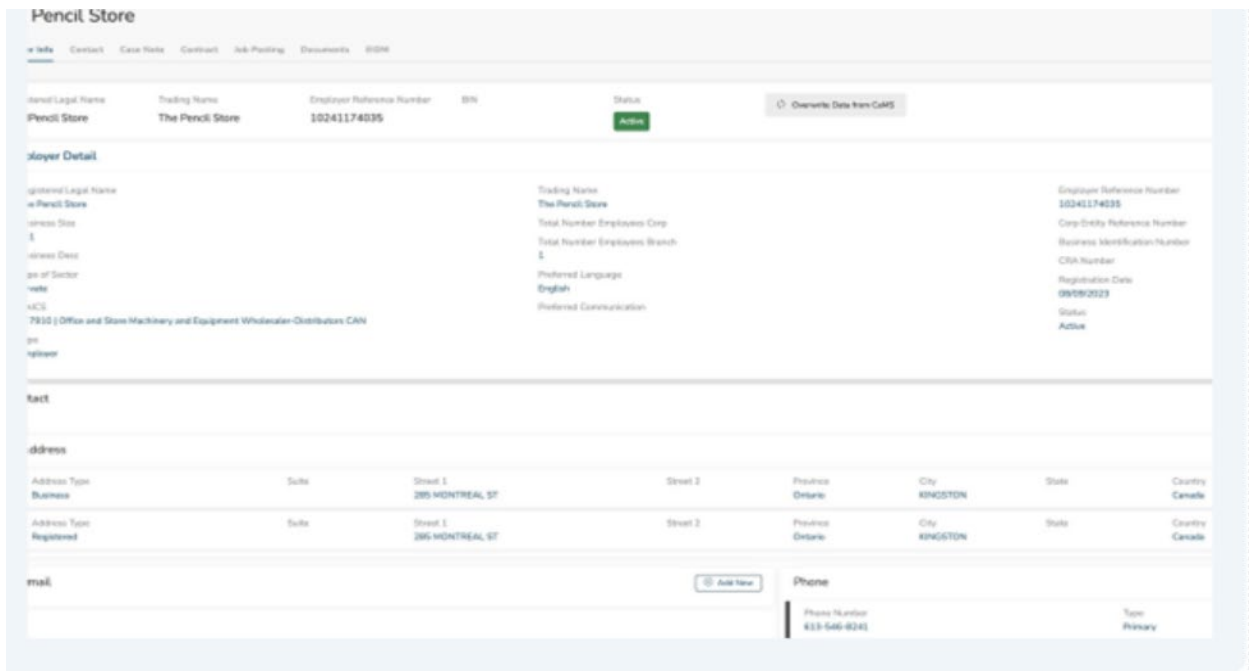
4. Click "Employer Reference Number."



5. Click "Overwrite."



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

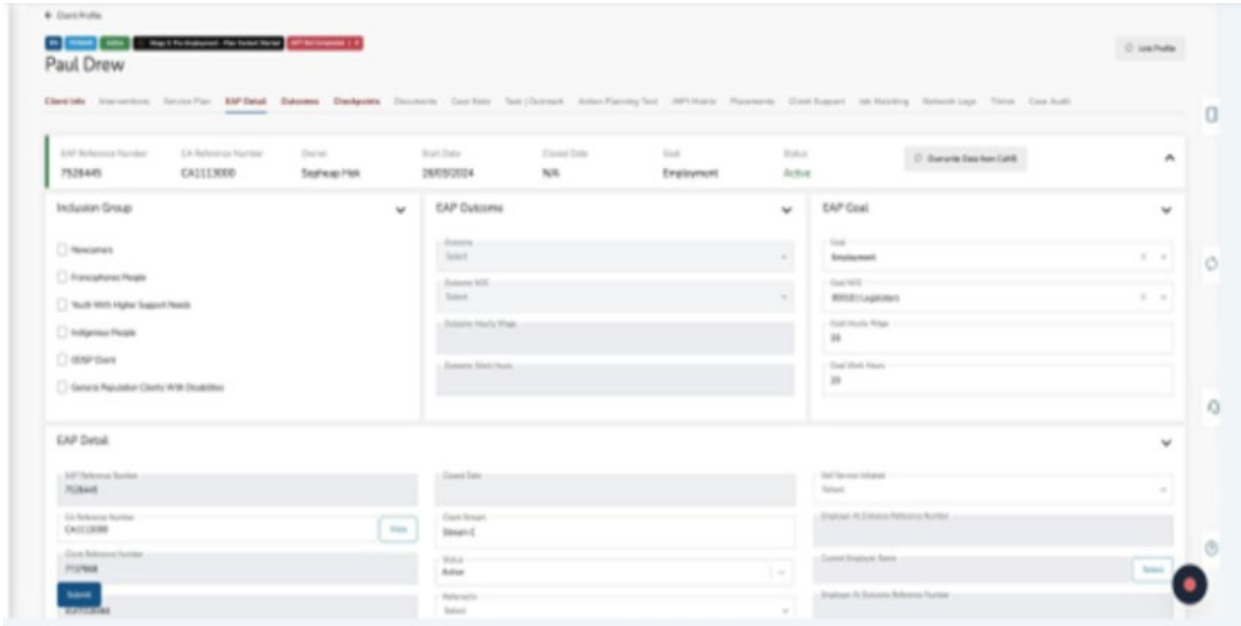


- Alert! Ministry APIs dictate that employer profiles in CaMS are not continuously synced with ESCases. Changes made in ESCases do not reflect in CaMS. If you want to update an employer profile, please do so in CaMS and repeat Step 4 onward from the above steps to update the changes in ESCases.

- ✓ 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.

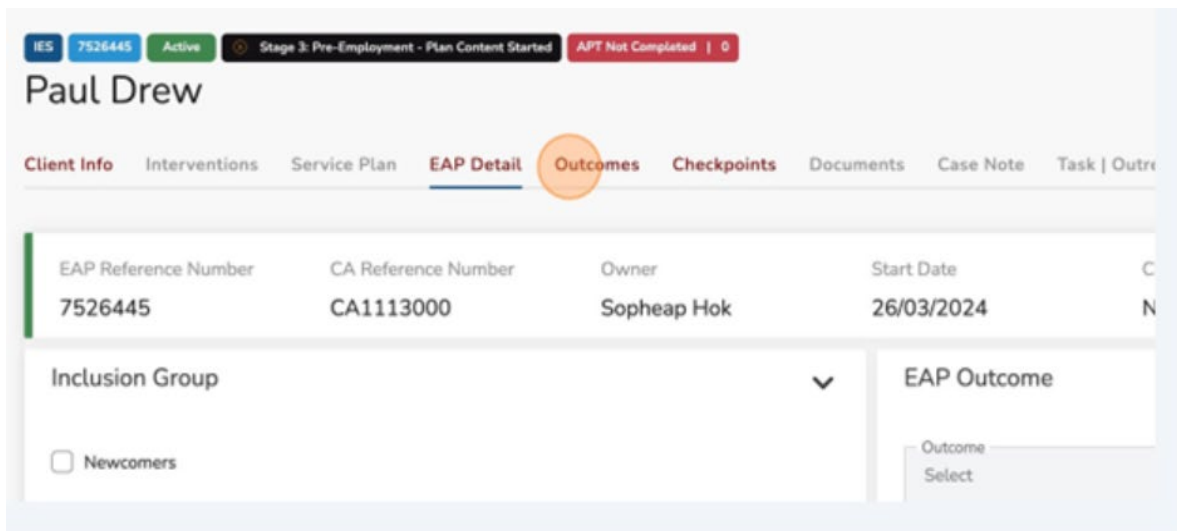
(17) Create an Outcome for a Client

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."

Outcome Date

N/A

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

7526445

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

Stake Holders

Client Management

CaMS Explorer

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

Stake Holders

Client Management

CaMS Explorer

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

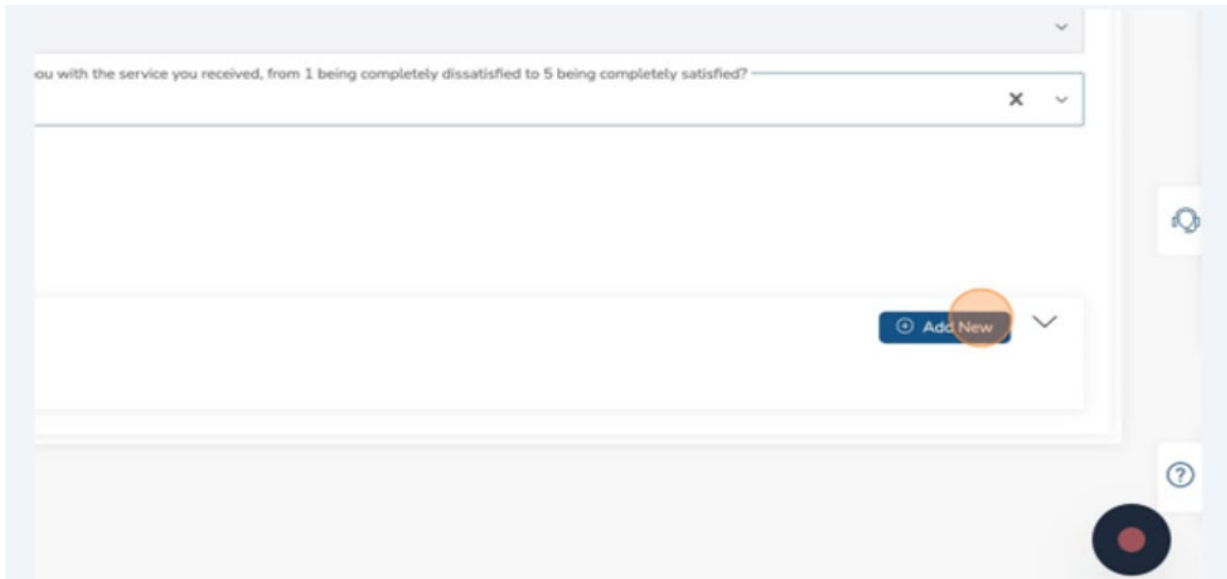
9. Click the “How many jobs do you currently have?” field.

The screenshot shows the same survey form as above, but with the 'How many jobs do you currently have?' field highlighted with an orange circle. The sidebar menu is now expanded to include 'Employer and Trainer' at the top. The main form area contains the following questions and answers:

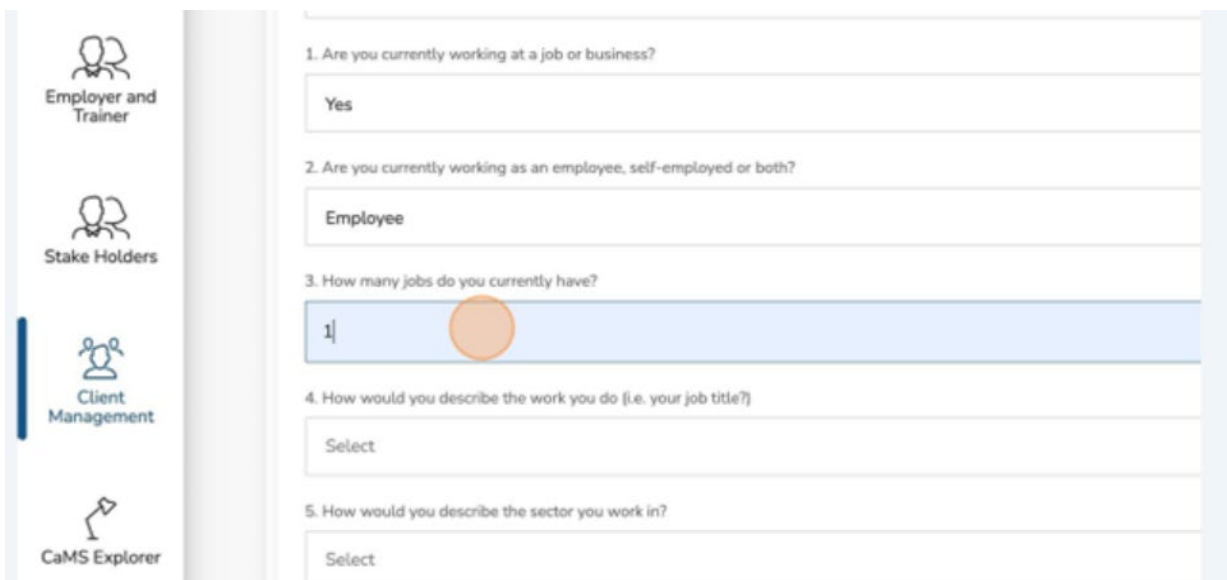
- 1. Are you currently working at a job or business? Yes
- 2. Are you currently working as an employee, self-employed or both? Employee
- 3. How many jobs do you currently have? (highlighted with an orange circle)
- 4. How would you describe the work you do (i.e. your job title?) Select
- 5. How would 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 containing navigation icons for '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: '7272 | Cabinetmakers' (highlighted with a blue bar and a mouse cursor), '7281 | Bricklayers', '7282 | Concrete Finishers', and '7283 | Tilesetters'.

13. Select the appropriate “NOC.”

This screenshot is similar to the previous one, showing the same sidebar and 'Employee' section. Question 3 has the answer '1'. Question 4's dropdown menu is open, showing a list of job titles: '7272 | Cabinetmakers' (highlighted with a blue bar and a mouse cursor), '7281 | Bricklayers', '7282 | Concrete Finishers', '7283 | Tilesetters', and '7284 | Plasterers, Drywall Installers and Finishers and Lathers'.

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

The screenshot shows a sidebar on the left with four menu items: 'Employer and Trainer', 'Stake Holders', 'Client Management', and 'CaMS Explorer'. The main content area contains three questions. Question 4, 'How would you describe the work you do (i.e. your job title)?', has a text input field containing '7272 | Cabinetmakers'. Question 5, 'How would you describe the sector you work in?', has a dropdown menu with 'Select' chosen. Question 10, 'When is the last time you were unemployed?', has an empty text input field. Below the questions is a section titled 'Outcome Jobs'.

15. Select the appropriate sector.

This screenshot shows the same form as above, but with the dropdown menu for question 5 open. The menu lists several options, with '311351 | Chocolate and Chocolate Confectionery Manufacturing from Cacao Beans' highlighted in blue. The other options are: '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'. The sidebar on the left is the same as in the previous screenshot.

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

The screenshot shows a web application interface. On the left is a sidebar with 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 date selection field with an orange circle highlighting the date '25'.
- A section titled 'Outcome Jobs'.
- A 'Submit' button at the bottom.

17. Select the appropriate date.

The screenshot shows the same web application interface as above, but with a calendar overlay. The calendar is for the month of August, with days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and 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 behind the calendar shows the question '10. When is the last time you were unemployed?' and the text '311351 | Chocolate and Confectionery Manufacturing from Cacao Beans'.

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 with a blue background. An orange circle highlights the "Select" text in the dropdown menu for question 12. Other questions visible include question 11 (number of employment changes) and question 14 (enrollment status).

21. Select the appropriate answer.

The screenshot shows the same form as above, but now question 12 is selected with a dark blue background. The dropdown menu for question 12 is open, and the "Yes" option is highlighted with a dark blue background and a brown circle. The "No" option is visible below it. Question 14 is also visible below question 12.

- ❖ 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. On the left, there are several input fields, some with an 'X' and a dropdown arrow. The main content area contains three questions:

- 14. Are you enrolled as a full-time or part-time student?
Select
- 15. Which of the categories best describes your current employment situation?
Select
- 16. How satisfied are you with the service you received, from 1 being completely dissatisfied to 5 being completely satisfied?
Select

An orange circle highlights the 'Select' text for question 16. A 'Response required' label is located to the right of question 16.

23. Select the appropriate answer.

The screenshot shows the dropdown menu for question 16. The question text is: "16. How satisfied are you with the service you received, from 1 being completely dissatisfied to 5 being completely satisfied?". The dropdown options are:

- Select
- Completely dissatisfied
- Dissatisfied
- Neutral
- Satisfied
- Completely satisfied
- Prefer not to answer

An orange circle highlights the 'Completely satisfied' option, which is also highlighted with a blue background.

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

The screenshot shows a form 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
- 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 form as above, but with the 'Yes' option selected for the question 'Are you looking to change your current employment in foreseeable future ?'. The 'Yes' option is highlighted with a dark blue background and a radio button. The other options are 'No', 'Not Sure', and 'Prefer not to say'.

- Job ID: 1
- 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

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

26. Input the appropriate answer.

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

Trainer

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 web form 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 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.

This screenshot shows the same web form as above, but with the dropdown menu closed. The text input field for the second question now contains "Permanent Job". 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 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 is 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."

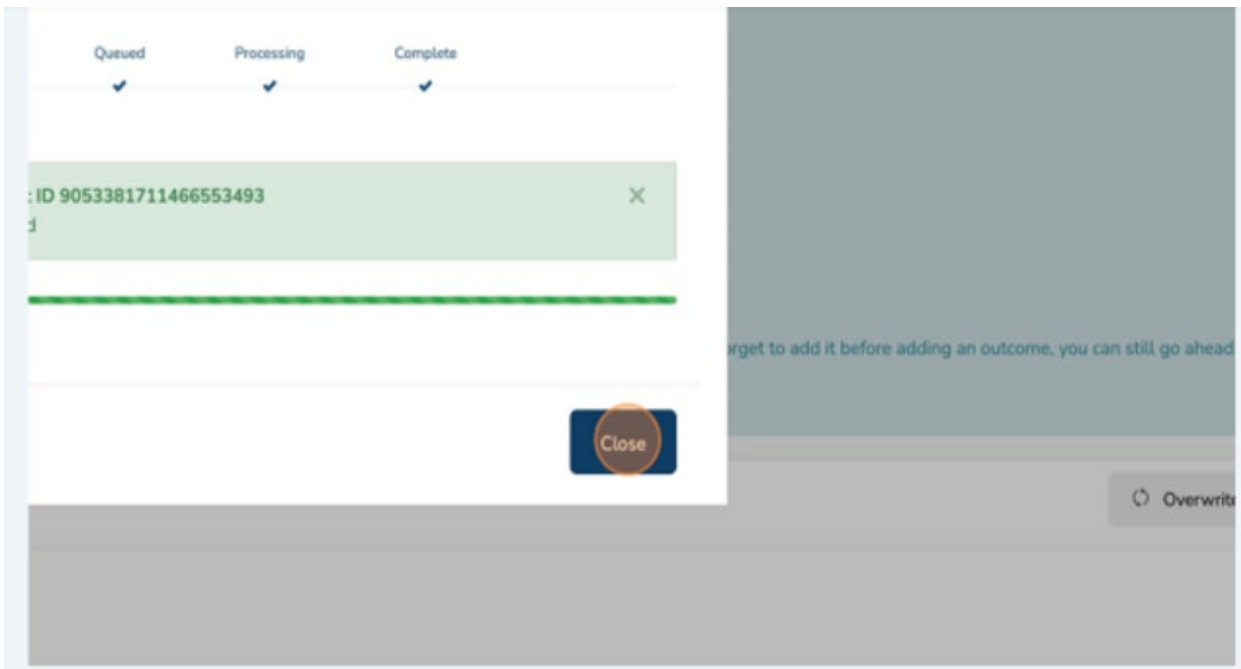
At the bottom of the page, there is a logo for "ESCA" and a "Submit" button.

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

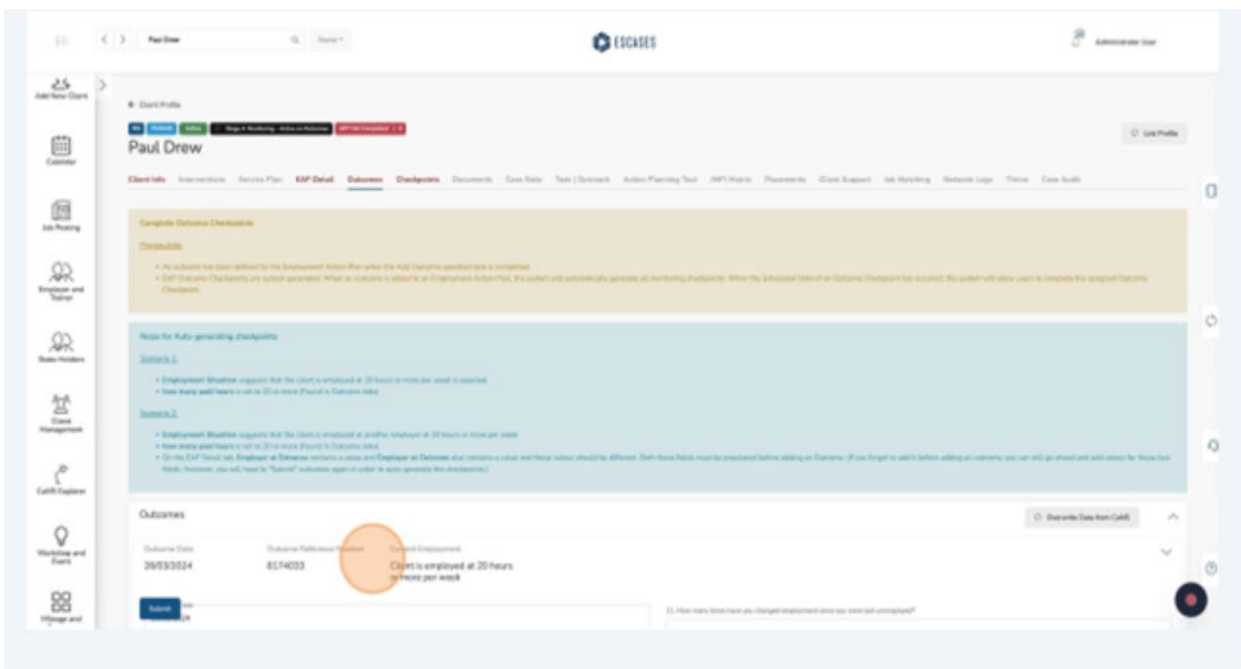
The screenshot shows a confirmation message overlaid on a form. The message box contains the text: "We've sent your update request to CaMS. While it's in progress, the fields will be locked. Feel free to work on another tab while you wait for it to finish." Below the message is a progress bar with four stages: "Submit" (checked), "Queued" (active), "Processing" (inactive), and "Complete" (inactive). Below the progress bar, the text reads "You are now first in the queue" followed by a loading spinner and a "Submitted" label. The background form is partially visible, showing a "Reference Number" field and a "Current Employment" section with the text "Client is employed at 20 hours or more per week". At the bottom right, there are two questions:

- 11. How many times have you changed employment since you were last unemployed? (Input: 0)
- 12. Are you currently attending a school, college, university, apprenticeship or other training program? (Input: No)

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

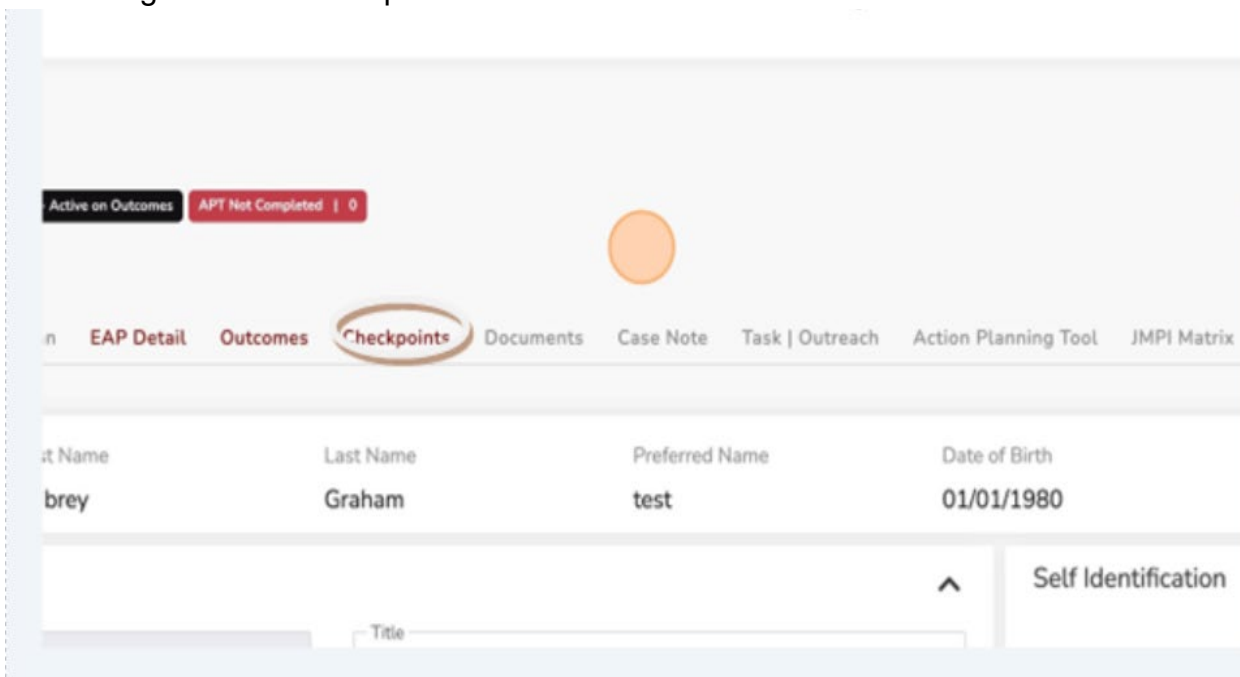


34. You have successfully submitted the Outcome.

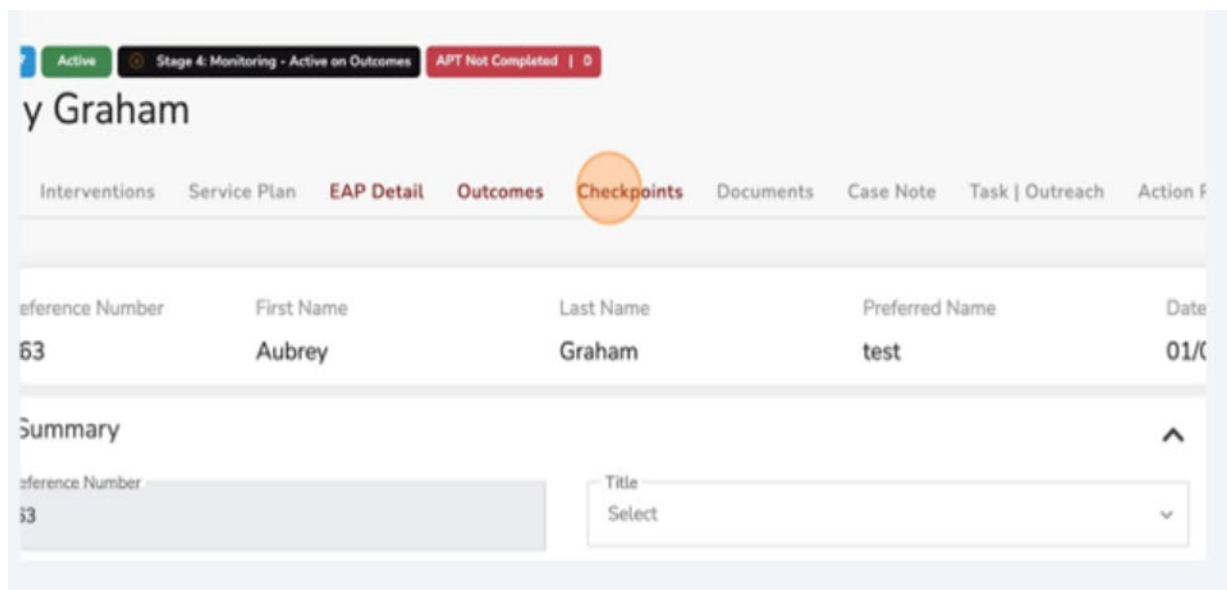


(18) Checkpoint and Document Upload

1. Navigate to the client profile.

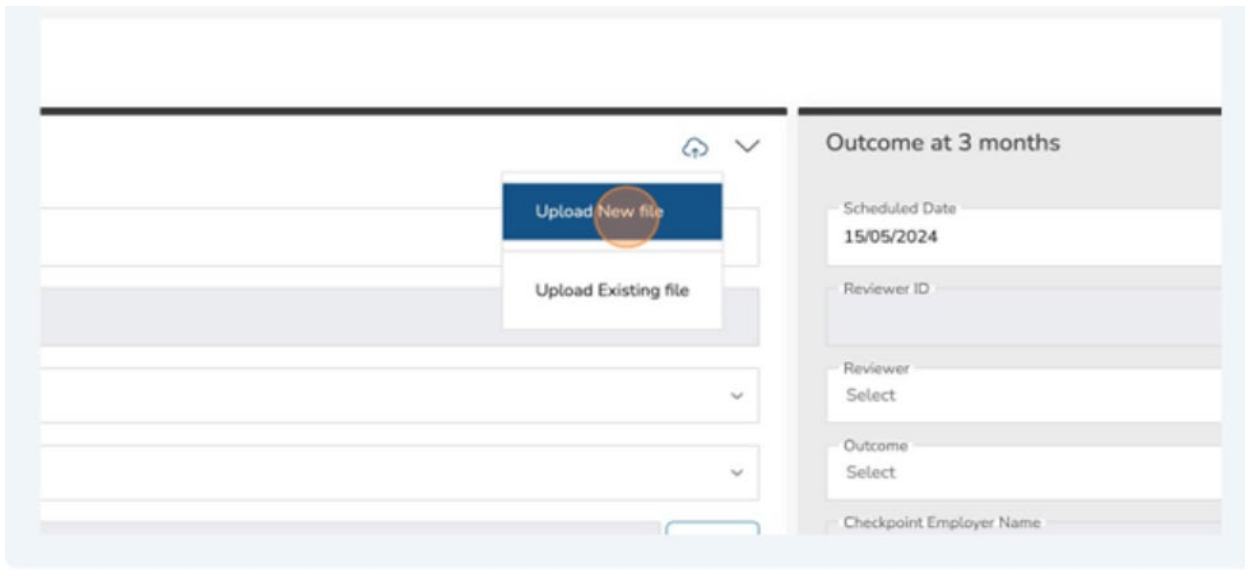


2. Click "Checkpoints."



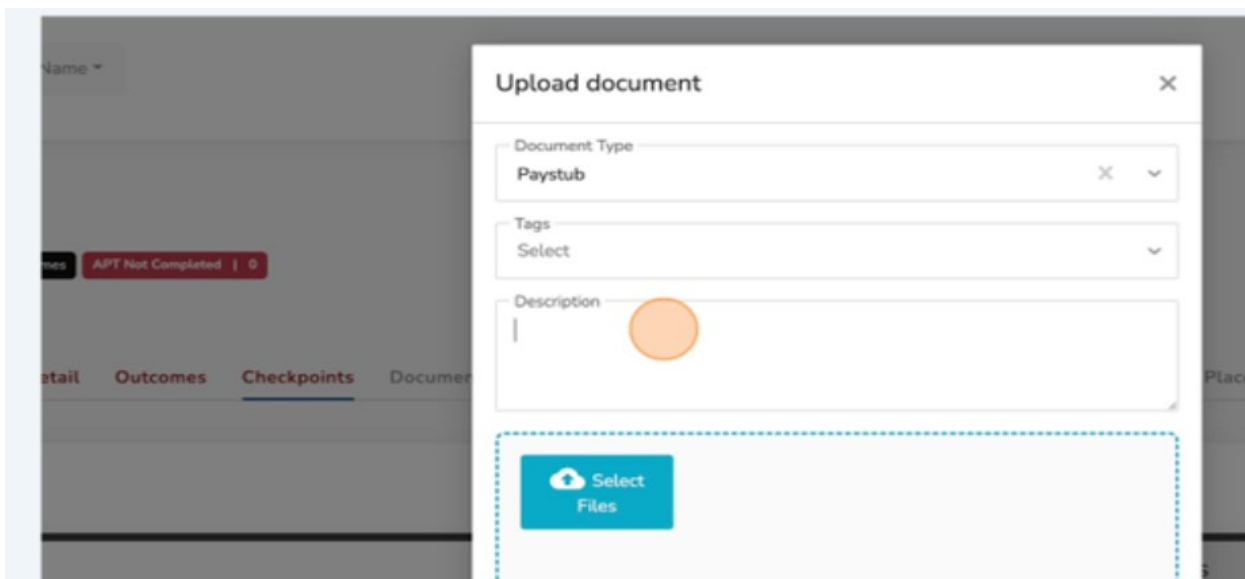
To upload proof of employment, complete the following steps:

3. Click "Upload New file."



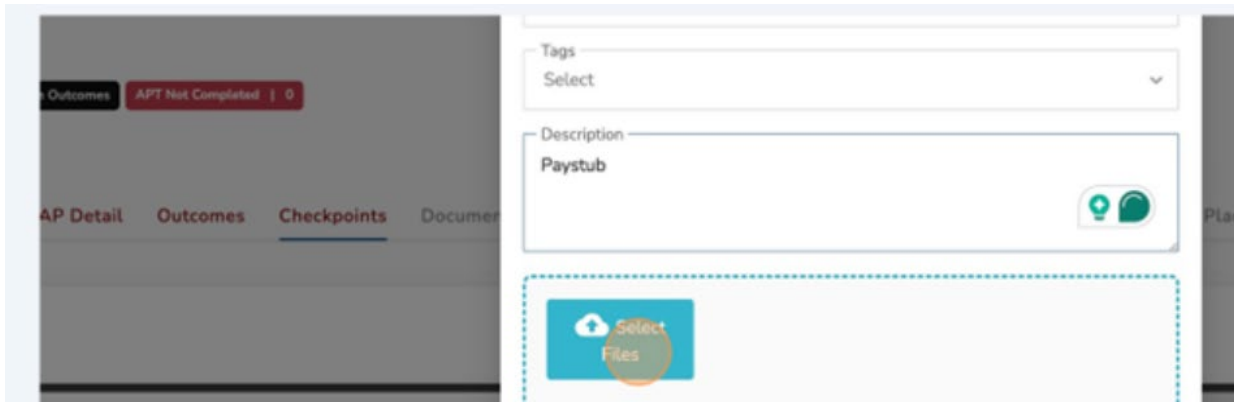
4. Select the appropriate "Document Type."

5. Click the "Description" field.

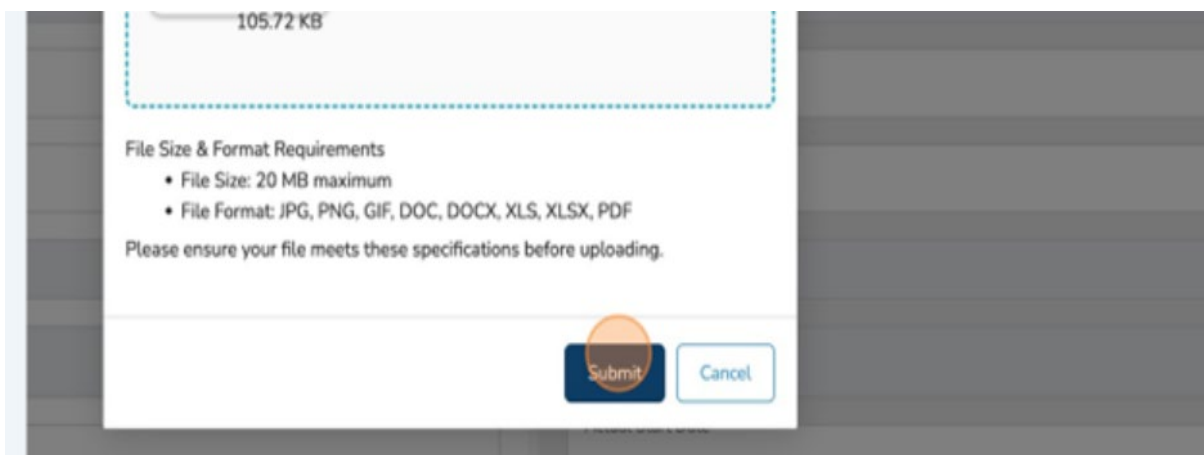


6. Input the appropriate description for the attachment.

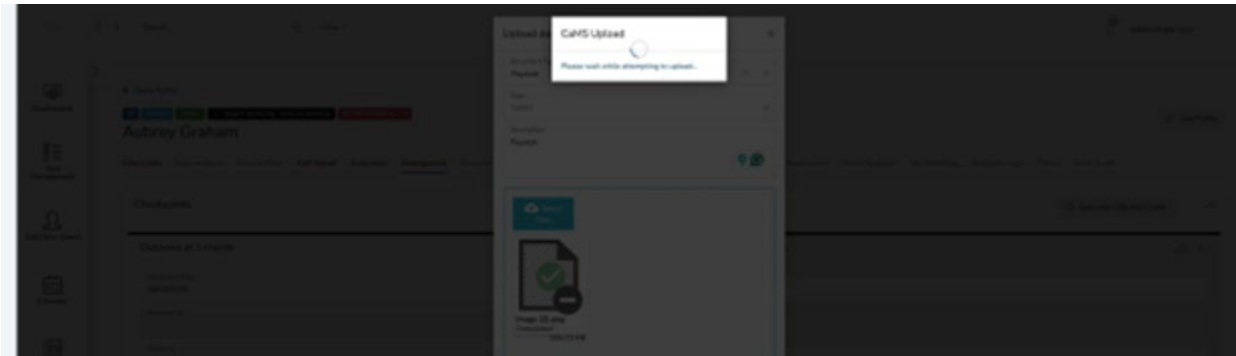
7. Click the “Select Files” button and select the appropriate attachment.



8. Click “Submit.”

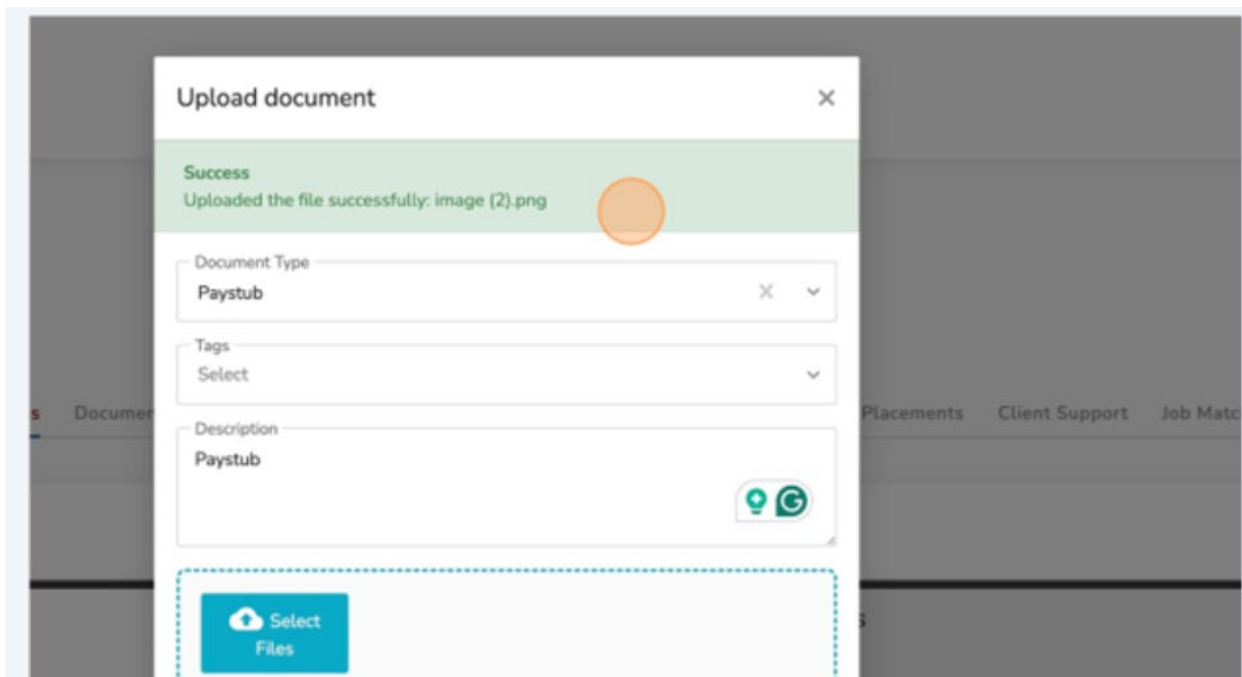


The attachment will be uploaded directly into CaMS.

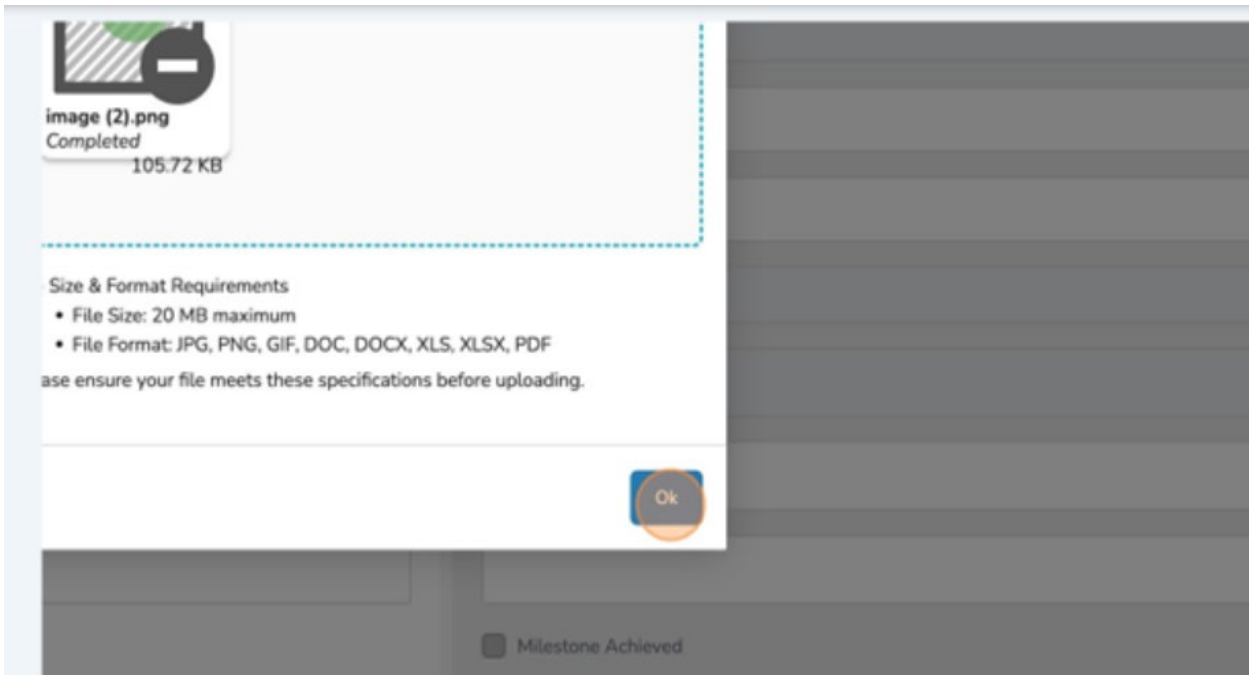


- ❖ Tip! Uploads directly into CaMS display a primary focus while the action is taking place to signify the importance.

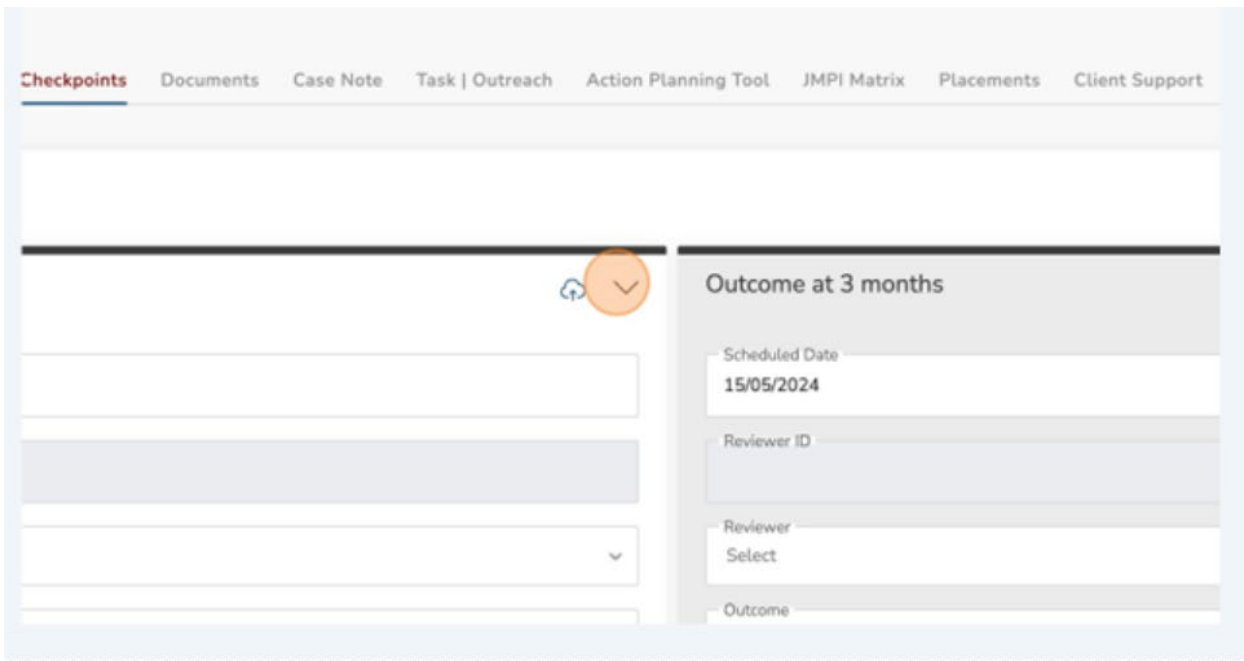
A success notification will be displayed.



9. Click "OK."



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



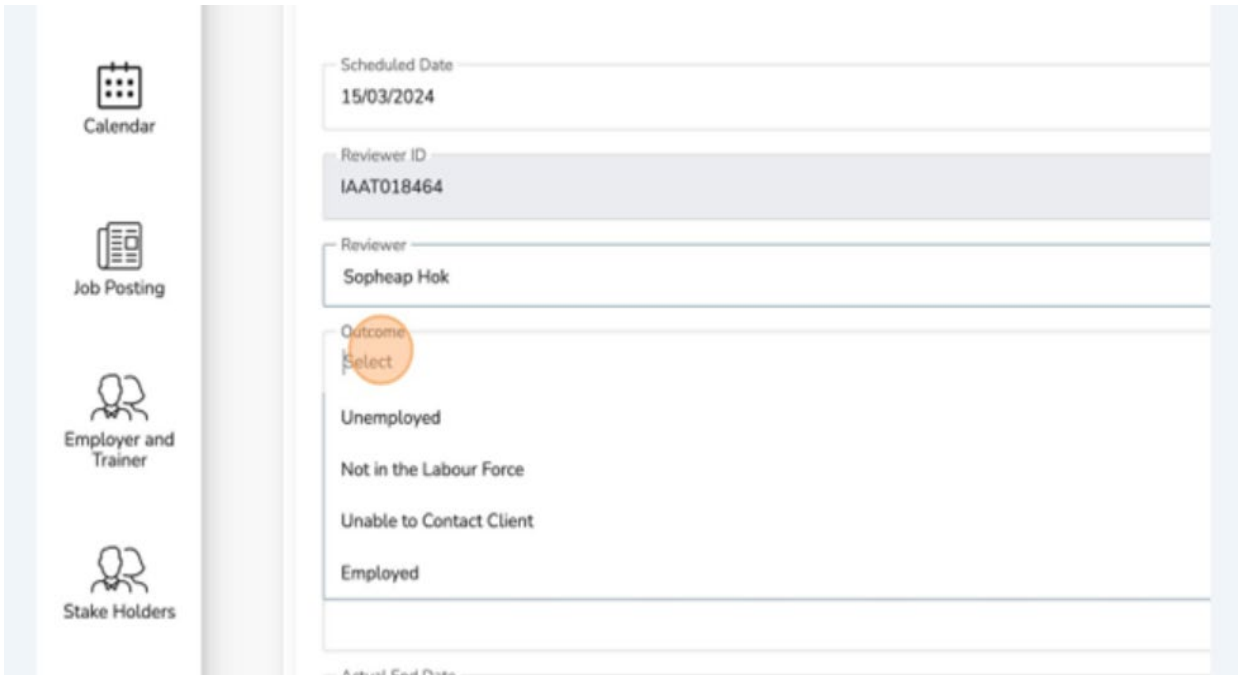
11. Click the "Reviewer" field.

The screenshot shows a web application interface. On the left is a vertical sidebar with five icons and their corresponding labels: 'Add New Client' (with a plus icon), 'Calendar' (with a calendar icon), 'Job Posting' (with a document icon), 'Employer and Trainer' (with a person icon), and 'Stake Holders' (with a person icon). The main content area is titled 'Outcome at 1 month' and contains several input fields. The 'Scheduled Date' field is filled with '15/03/2024'. The 'Reviewer ID' field is empty. The 'Reviewer' field is currently displaying 'Select' and is highlighted with an orange circle. Below it, the 'Outcome' field also displays 'Select'. The 'Checkpoint Employer Name' field is filled with 'N/A'. The 'Checkpoint Employer ID' field is empty.

12. Select the appropriate "Reviewer."

This screenshot shows the same 'Outcome at 1 month' form, but the 'Reviewer' dropdown menu is now open. The menu lists 'sop' and 'Sopheap Hok', with 'Sopheap Hok' highlighted in a dark blue bar. An orange circle highlights the 'Sopheap Hok' option. The 'Actual Start Date' and 'Actual End Date' fields are visible at the bottom of the form.

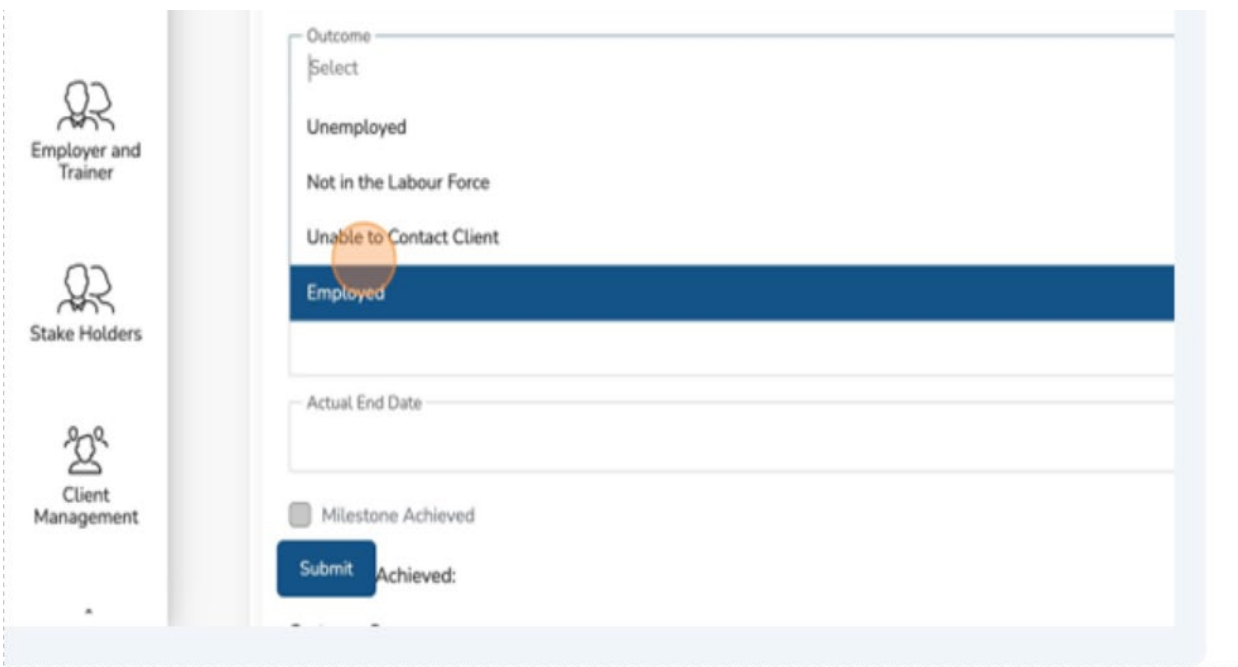
13. Click the "Outcome" field.



The screenshot shows a sidebar on the left with four icons: a calendar, a document, two people, and two people with a plus sign. The main content area contains a form with the following fields:

- Scheduled Date: 15/03/2024
- Reviewer ID: IAAT018464
- Reviewer: Sopheap Hok
- Outcome: Select (highlighted with an orange circle)
- Unemployed
- Not in the Labour Force
- Unable to Contact Client
- Employed

14. Select the appropriate "Outcome."



The screenshot shows the same sidebar as above. The main content area shows the 'Outcome' field with a dropdown menu open. The options are:

- Select
- Unemployed
- Not in the Labour Force
- Unable to Contact Client
- Employed (highlighted with a blue bar and an orange circle)

Below the dropdown is the 'Actual End Date' field, a 'Milestone Achieved' checkbox, and a 'Submit' button.

15. Click the "Actual Start Date."

The screenshot shows a web application interface. On the left is a vertical sidebar menu with four icons and labels: 'Job Posting', 'Employer and Trainer', 'Stake Holders', and 'Client Management'. The main content area contains a form for 'Sopheap Hok'. The form has several sections: 'Outcome' with the value 'Employed'; 'Checkpoint Employer Name' with the value 'N/A'; 'Checkpoint Employer ID' (empty); 'Actual Start Date' (empty, highlighted with an orange circle); 'Actual End Date' (empty); 'Milestone Achieved' (checkbox is unchecked); 'Milestone Achieved:' (empty); and 'Customer Survey' (empty). At the bottom, there is a blue 'Submit' button and a message: 'This feature is currently unavailable. Please manually input your customer survey responses below to full'.

16. Select the appropriate start date.

The screenshot shows the same web application interface as above, but with a calendar widget open over the 'Actual Start Date' field. The calendar is for 'March 2024' and shows days from Sunday to Saturday. The date '26' is highlighted with a dark blue circle. Below the calendar, the 'Actual Start Date' and 'Actual End Date' input fields are visible. A speech bubble icon is present on the right side of the interface.

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 26th 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 'Milestone Achieved' checkbox and a 'Submit' button.

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

Actual End Date

Milestone Achieved

Milestone Achieved:

Customer Survey

Submit

18. Enter the end date.

This screenshot is similar to the previous one, but the 'Actual End Date' field now contains the date '26/03/2024'. The calendar is still visible, and the 'Submit' button is present.

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

Actual End Date

Milestone Achieved

Milestone Achieved:

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

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

- Outcome Checkpoint Reference Id: -9198514088995454976
- Outcome Ckp Reference Number: 6172526
- Question 1: "1. Are you currently working at a job or business?" with a dropdown menu showing "Select", "Yes", and "No". An orange circle highlights the "Select" option.
- Question 3: "3. How many jobs do you currently have?" with a text input field containing "0".
- Question 4: "4. How would you describe the work you do (i.e. your job title?)" with a text input field.

20. Select the appropriate answer.

This screenshot shows the same form as above, but with the "Yes" option selected for question 1. The "Yes" option is highlighted with a dark blue background, and an orange circle is positioned over it. The other fields remain the same: Outcome Ckp Reference Number is 6172526, and the number of jobs is 0. The dropdown for question 4 now shows "Select" as the chosen option.

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

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

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

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

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

Task nagement

New Client

Calendar

Job Posting

Employer and Trainer

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.

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

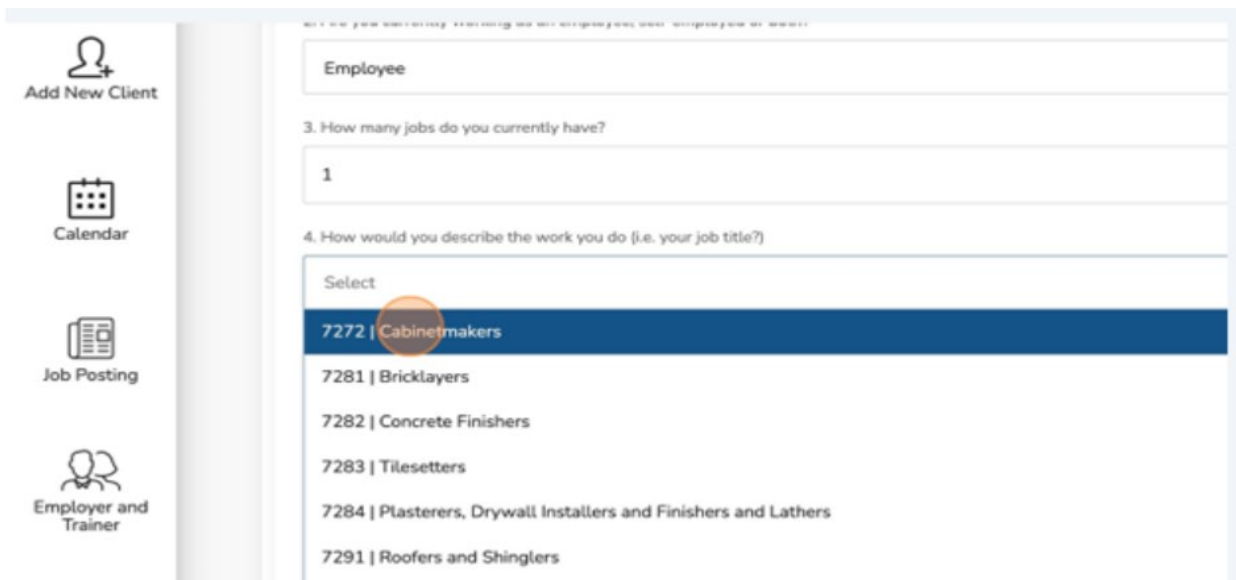
5. How would you describe the sector you work in?
Select

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

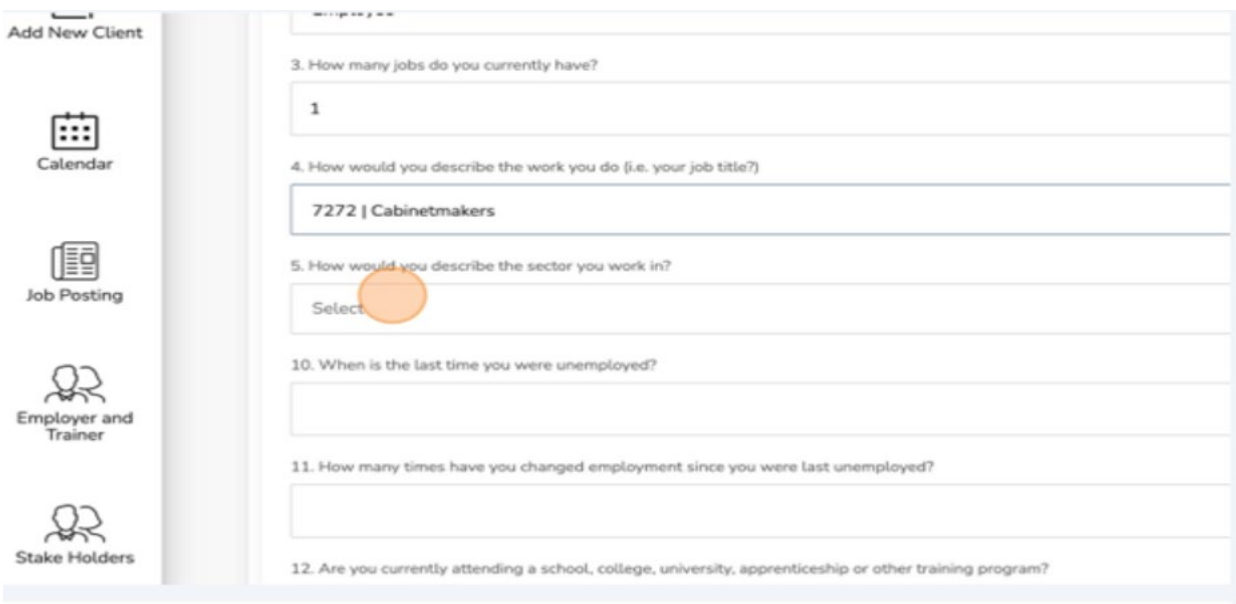
27. Select the appropriate NOC.



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 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 with a blue bar and an orange circle), '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 and highlighted with an orange circle. The dropdown menu contains the text 'Select'.

The sidebar on the left remains the same, with the 'Stake Holders' icon at the bottom.

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?

31. Select the appropriate date.

The screenshot shows a form interface with a sidebar on the left containing icons for 'Add New Client', 'Calendar', 'Job Posting', 'Employer and Trainer', and another icon. A calendar pop-up is displayed over the form, showing the month of March 2024. The calendar grid has days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and dates from 1 to 31. The date 25 is highlighted with an orange circle, and the date 26 is highlighted with a blue square. Below the calendar, the form contains question 10: 'When is the last time you were unemployed?' with an empty text input field. Below that is question 11: 'How many times have you changed employment since you were last unemployed?' with an empty text input field.

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

The screenshot shows a form interface with a sidebar on the left containing icons for 'Job Posting', 'Employer and Trainer', 'Stake Holders', and 'Client Management'. The form contains several questions: question 5 'How would you describe the sector you work in?' with a text input field containing '311351 | Chocolate and Chocolate Confectionery Manufacturing from Cacao Beans'; question 10 'When is the last time you were unemployed?' with a text input field containing '25/03/2024'; question 11 'How many times have you changed employment since you were last unemployed?' with a text input field containing '1', which is highlighted with an orange circle; question 12 'Are you currently attending a school, college, university, apprenticeship or other training program?' with a dropdown menu showing 'Select'; and question 13 'How would you best describe the education or training you are attending?' with a dropdown menu showing 'Select'. A blue 'Submit' button is located at the bottom of the form.

33. Enter the appropriate number.

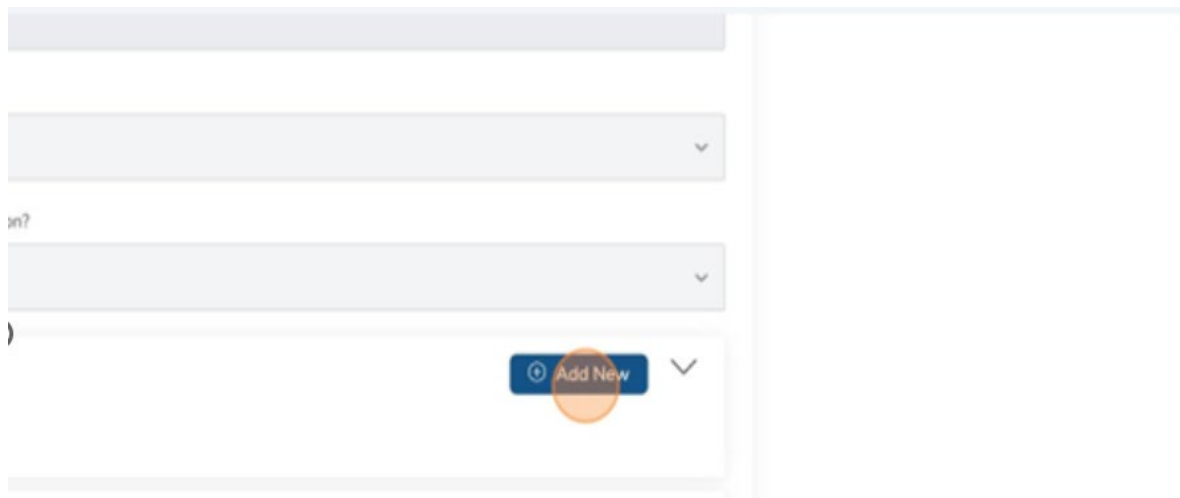
34. Click the “Are you currently attending a school, college, or university...?” field.

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

35. Select the appropriate answer.

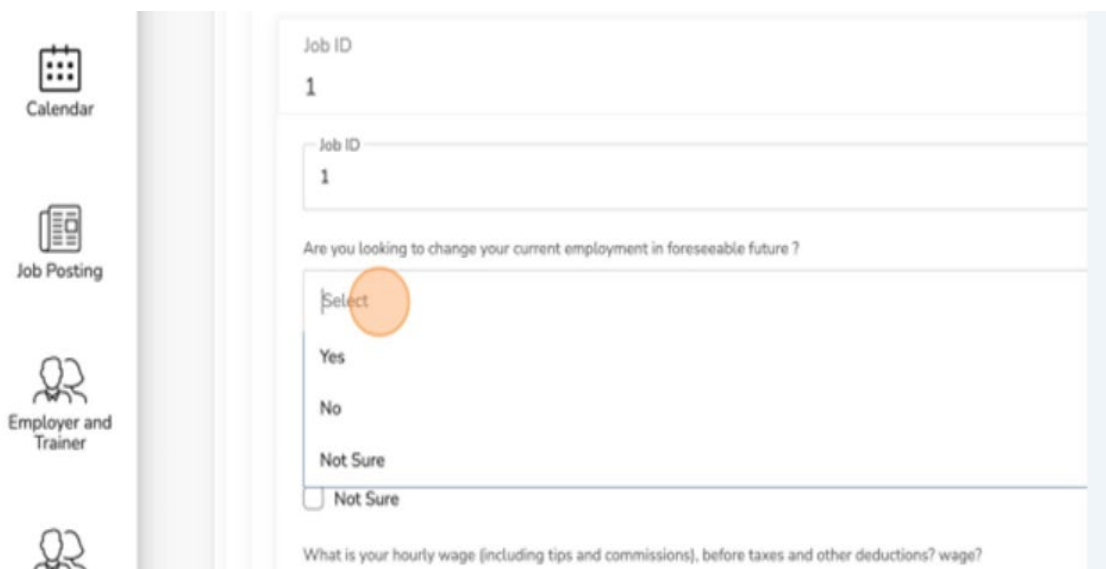
- ❖ Tip: The questions vary as they are guided by conditional logic. This means certain questions will only appear based on specific answers being supplied.
- Alert! Should your response to Question 3 (How many jobs do you currently have?) be one or more, it is mandatory to fill out the Checkpoints Jobs 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 rectangular input fields stacked vertically. The bottom-most field contains a blue button with a white plus sign and the text "Add New", which is circled in orange. To the right of the button is a small downward-pointing chevron icon. The text "m?" is visible to the left of the second field from the top.

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 the following elements:

- A "Job ID" field with the value "1".
- A second "Job ID" field with the value "1".
- A question: "Are you looking to change your current employment in foreseeable future ?".
- A dropdown menu with the text "Select" circled in orange. Below it are the options "Yes", "No", and "Not Sure".
- A radio button next to the text "Not Sure".
- A question at the bottom: "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?

Client

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

Calendar

Job Posting

Employer and Trainer

Stake Holders

Client

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?

40. Input the appropriate answer.

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

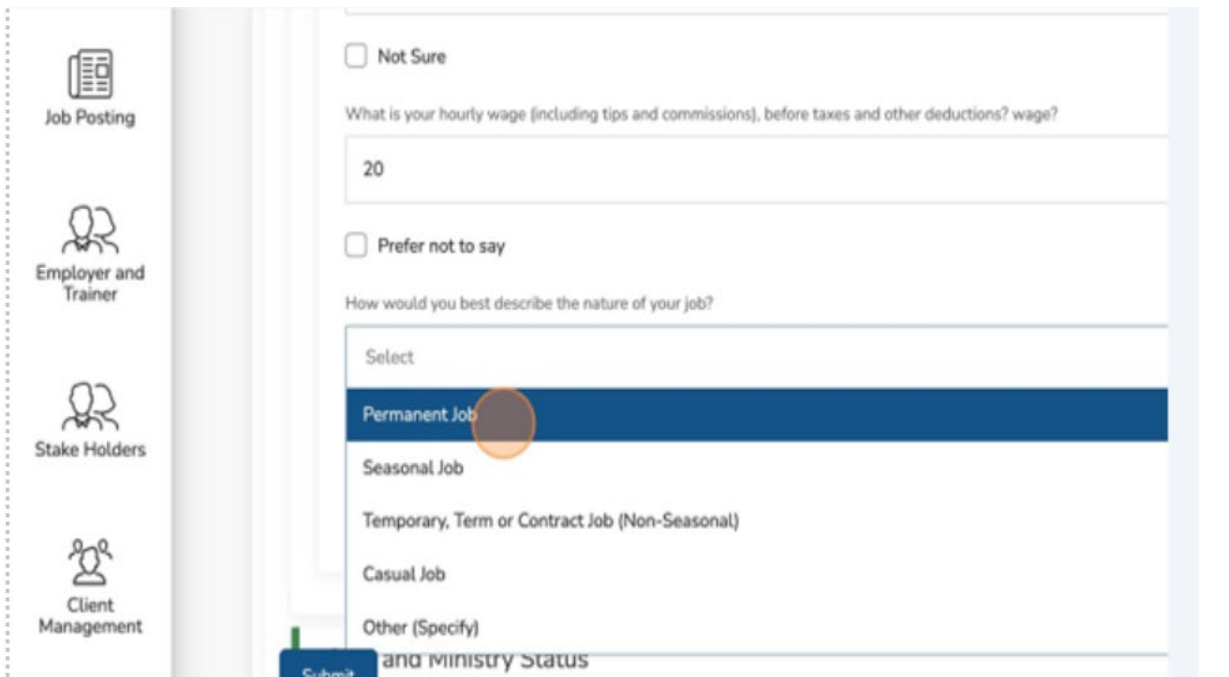
The screenshot shows a form with a sidebar on the left containing four icons: Job Posting, Employer and Trainer, Stake Holders, and Client Management. The main form area contains several questions. The question "What is your hourly wage (including tips and commissions), before taxes and other deductions? wage?" has a text input field containing the number "0". An orange circle highlights this field. 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 a "No" response, and "Excluding overtime, on average, how many paid hours do you usually work per week?" with a "20" response. A "Submit" button is located at the bottom left of the form area.

42. Input the appropriate answer.

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

The screenshot shows the same form as above, but with the question "How would you best describe the nature of your job?" expanded. The dropdown menu is open, showing options: "Select", "Permanent Job", "Seasonal Job", "Temporary, Term or Contract Job (Non-Seasonal)", "Casual Job", and "Other (Specify)". An orange circle highlights the "Select" option. 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.

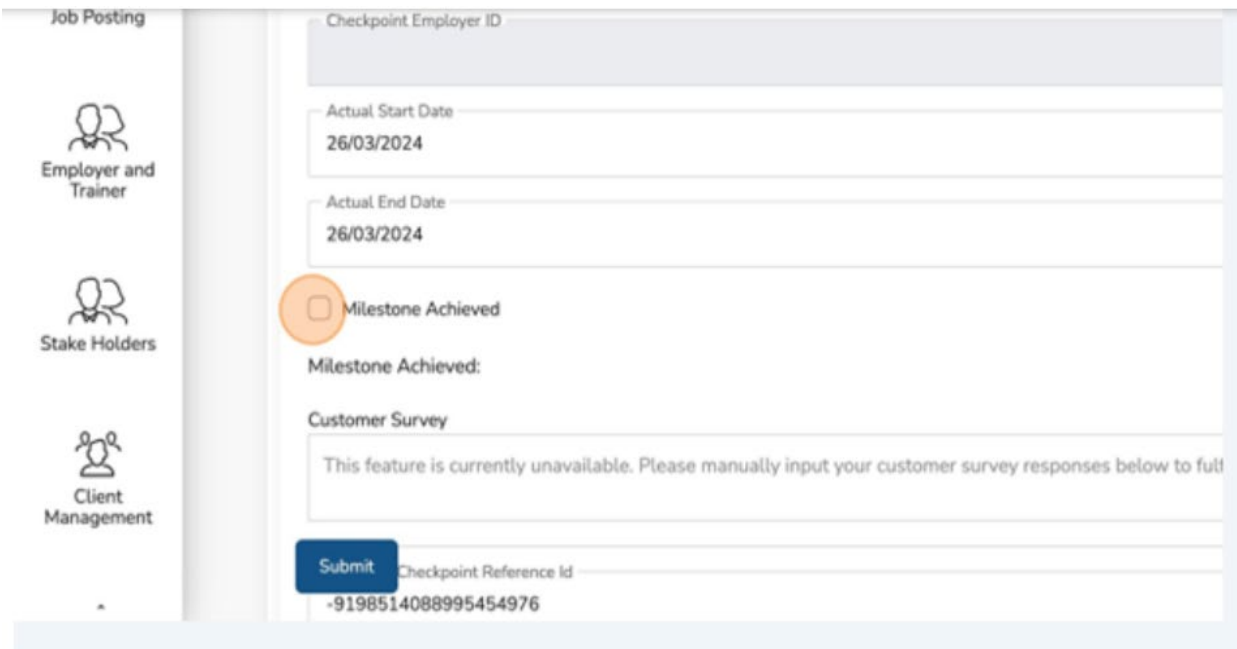


The screenshot shows a questionnaire interface with a sidebar on the left containing four menu items: Job Posting, Employer and Trainer, Stake Holders, and Client Management. The main content area contains the following elements:

- A radio button 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".
- A radio button 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 with a blue bar and an orange circle), "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 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".
- A radio button labeled "Milestone Achieved" which is highlighted with an orange circle.
- A text input field labeled "Milestone Achieved:".
- 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 "-9198514088995454976".

46. Click "Submit."

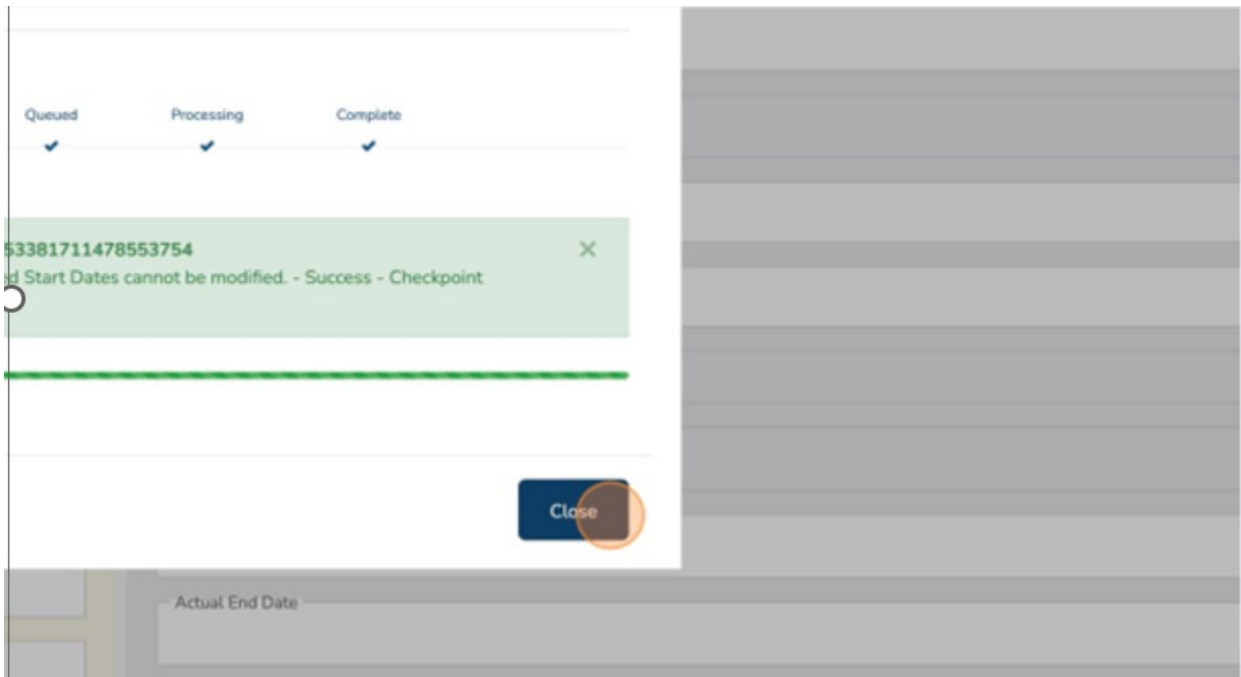
A screenshot of a web form for job posting details. The form is titled "Job Posting" and contains several input fields. The "Scheduled Date" field is filled with "15/08/2024". The "Reviewer ID" field is empty. The "Reviewer" field has a dropdown menu with "Select" as the current selection. The "Outcome" field also has a dropdown menu with "Select" as the current selection. The "Checkpoint Employer Name" field is filled with "N/A". The "Checkpoint Employer ID" field is empty. At the bottom of the form, there is a field for "Actual Start Date" and a blue "Submit" button.

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

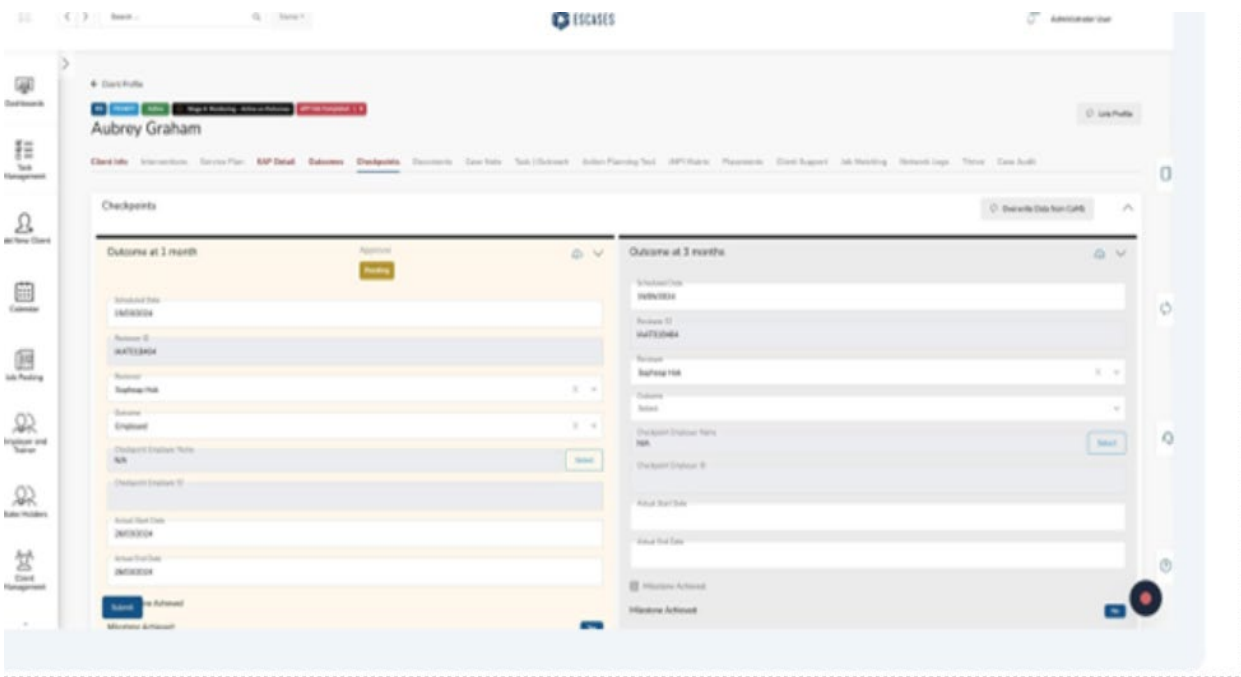
A screenshot of a web application interface. The main content area shows a "Checkpoints" section for "Aubrey Graham". A modal window titled "CaMS Checkpoints Update" is open in the center. The modal contains a progress bar with four steps: "Save", "Cancel", "Processing", and "Complete". The "Processing" step is currently active. Below the progress bar, it says "You are now first in the queue" and "Queue". The background of the application is dimmed, showing various navigation icons on the left and a top navigation bar.

You will be provided with a success notification.

47. Click "Closed."



You have successfully submitted your checkpoint.



(19) Client Supports

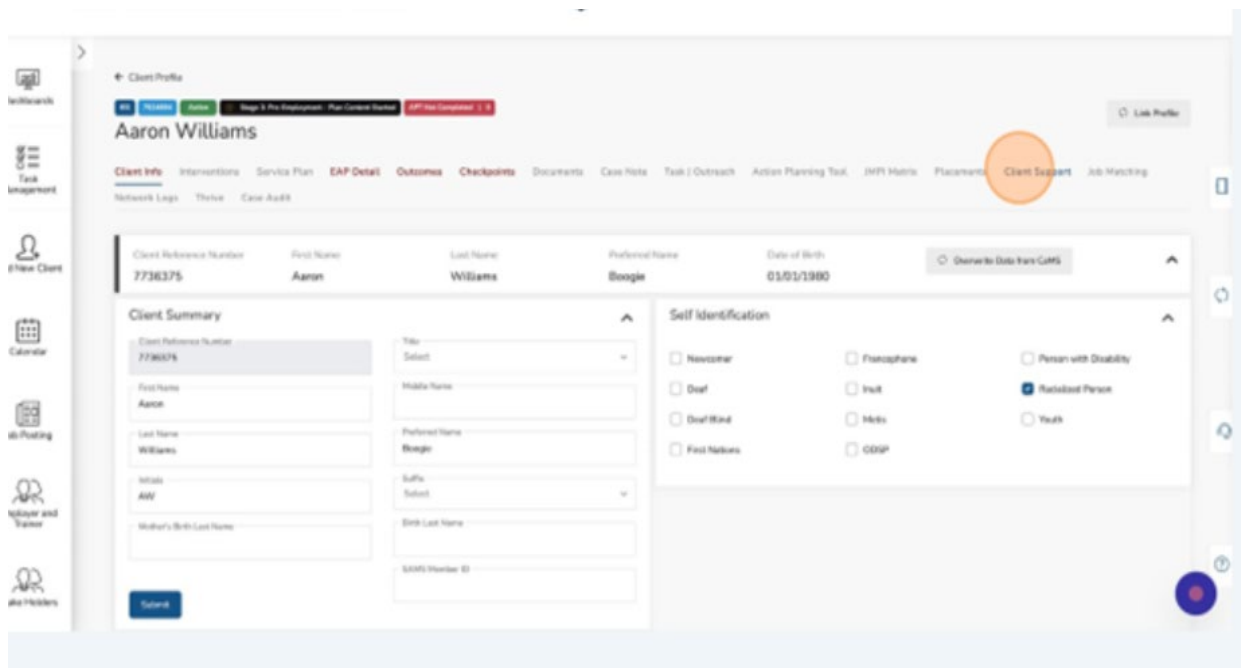
The Client Support workflow requires both submission of a request and approval.

Client Support Workflow – Submit a Request

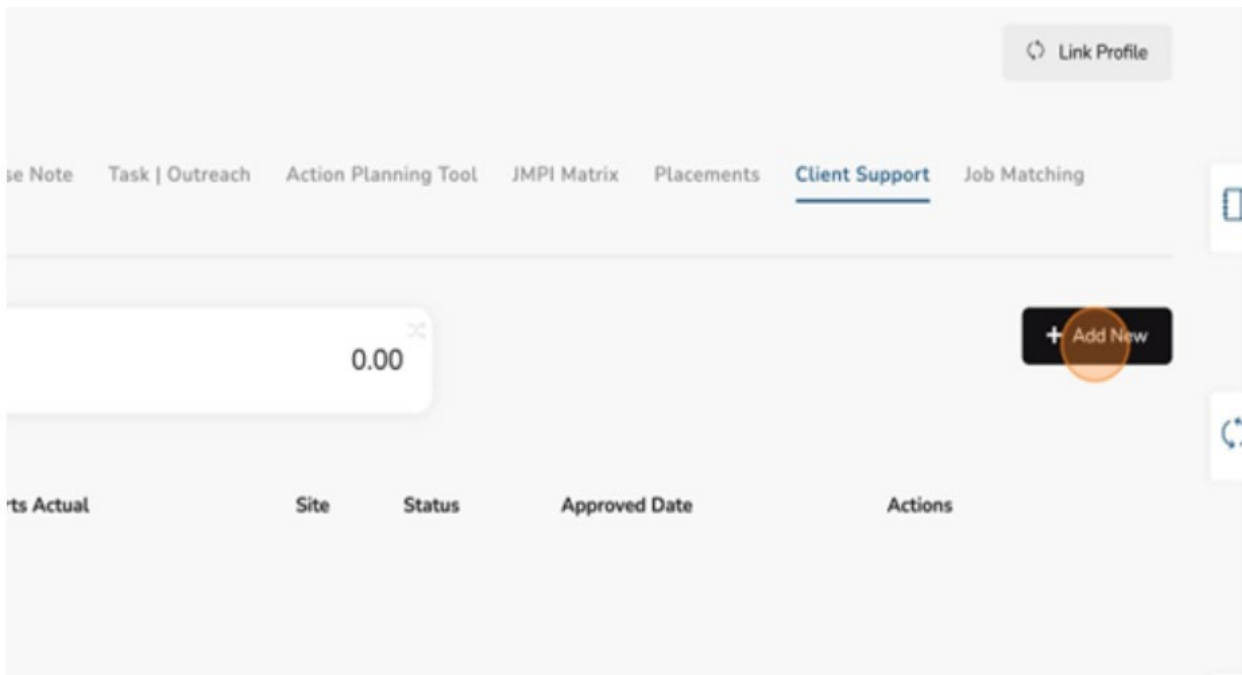
Please note: Information entered in this section will not be uploaded to CaMS. ESCases has the ability to track budgets and the actual or committed amounts attached to the budget.

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

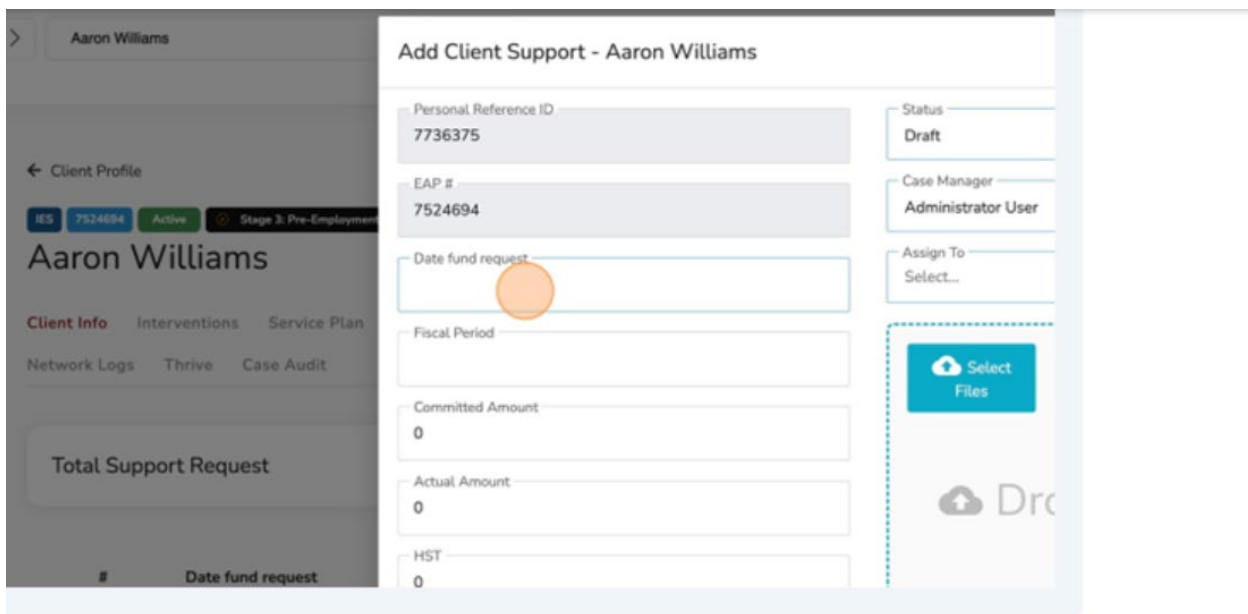
1. Navigate to the client profile and click “Client Support.”



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" with a sidebar on the left containing "# Date fund request". The main form fields are: "Actual Amount" (0), "HST" (0), "Support Type" (Select...), "Rationale" (empty text area), "Program/Fund (ES/ODSP)" (General Support), and "Preferred Vendor" (empty). An orange circle highlights the "Support Type" dropdown menu. 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 in blue and has an orange circle around it. Other options in the list 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: the first column has a '#' symbol, and the second column has the text 'Date fund request'. At the bottom of the sidebar, it says 'ESCASES 2020'. The main form 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, there is a light blue vertical bar with a dashed blue border, containing an upload icon (a cloud with an arrow) and a letter 'D'.

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 application interface for a 'Total Support Request'. On the left is a dark sidebar with the title 'Total Support Request' and a table with columns '#', 'Date fund request', and a plus sign icon. The main content area contains several form fields: 'Support Type' (dropdown menu with 'Job seeker - Accommodation needs - assistive de...' selected), 'Rationale' (text area with 'This device is required for ABCD.' and a green 'G' icon), 'Program/Fund (ES/ODSP)' (dropdown menu with 'General Support' selected and highlighted by an orange circle), 'Preferred Vendor' (empty text area), and 'Item Description' (empty text area). At the bottom, there are radio button options for 'Internal Transfer' and 'Clients responsible for obtaining receipt(s)'. A dashed blue box highlights the right side of the form.

13. Select the appropriate Fund.

This screenshot shows the 'Program/Fund (ES/ODSP)' dropdown menu expanded. The 'General Support' option is highlighted with a blue background and an orange circle. Below it, the 'ODSP' option is visible. 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 '#' icon 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' with an orange circle highlighting the field; and 'Item Description' which is empty. At the bottom, there are radio buttons for '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'.

15. Insert the “Preferred Vendor” as required.

16. Click the “Item Description” field.

The screenshot shows the same form as above, but with the 'Rationale' field filled with the text 'This device is required for ABCD.' and the 'Preferred Vendor' field filled with the text 'The preferred vendor is Selling Corp.'. The 'Item Description' field is now highlighted with an orange circle. The rest of the form, including the sidebar and bottom options, remains 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.

The screenshot shows a web form titled "Client Support - Aaron Williams". On the left side, there are several input fields: "Personal Reference ID" (empty), "P #" (empty), "Request Date" (containing "/03/2024"), "Fiscal Period" (containing "23-2024"), "Submitted Amount" (containing "0"), and "Actual Amount" (empty). On the right side, there are three dropdown menus: "Status" (set to "Draft"), "Case Manager" (set to "Administrator User"), and "Assign To" (set to "Select..."). A blue circle highlights the "Status" dropdown. Below these menus is a file upload area with a "Select Files" button and a "Drop files here" instruction. A dark sidebar on the right contains the text "Matrix Placements".

19. Select "Submit."

This screenshot is similar to the previous one, but the "Status" dropdown menu is open, showing three options: "Draft", "Submit", and "Submit". A blue circle highlights the "Submit" option. The rest of the form fields and the file upload area remain the same as in the previous screenshot.

20. Click the “Case Manager” field.

The screenshot shows a form titled "Client Support - Aaron Williams" with a close button (X) in the top right corner. On the left side, there are several input fields: "Reference ID" (containing "75"), "Case ID" (containing "14"), "Request ID" (containing "1024"), "Period" (containing "024"), "Budgeted Amount", and "Amount". On the right side, there are two dropdown menus. The top one is labeled "Status" and has "Submit" selected. The second dropdown is labeled "Case Manager" and is currently open, showing a list of names: "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 "Administrator User" option in the dropdown menu.

21. Select the appropriate “Case Manager.”

This screenshot shows the same form as above, but with the "Case Manager" dropdown menu closed and "JobCoach Thomas" selected. An orange circle highlights the "JobCoach Thomas" option. Below the dropdown menu, a file upload area is visible, enclosed in a dashed blue border. It contains a blue button labeled "Select Files" and a larger area with the text "Drop files here" and an upload icon.

22. Click the "Assign to" field.

Client Support - Aaron Williams

Final Reference ID: 13375

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: 13375

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 green plus icon and a green 'G' icon. The third field contains the text '20.'. The fourth field contains the text 'Receipt(s)' and a dropdown menu with the text 'ada - Downsview - SSM'. At the bottom right, there are two buttons: 'Submit' (highlighted with an orange circle) and 'Cancel'.

Client Support has been successfully submitted.

The screenshot shows a client profile page for Aaron Williams. The page includes a navigation menu on the left with icons for Dashboard, Case Management, Add New Client, Calendar, Job Posting, Employer and Trainer, and Stakeholders. The main content area shows the client's name, a 'Link Profile' button, and a list of tabs including Client Info, Interventions, Service Plan, EAP Detail, Outcomes, Checkpoints, Documents, Case Note, Task / Outreach, Action Planning Tool, JWP Matrix, Placements, Client Support (selected), and Job Matching. Below the tabs, there are two summary boxes: 'Total Support Request' with a value of \$200.00 and 'Total Support Actual' with a value of 0.00. An 'Add New' button is next to the second box. Below these boxes is a table with the following data:

#	Date fund request	Supports Request	Supports Actual	Site	Status	Approved Date	Actions
1	21-Mar-2024	\$200.00	50.00	5338A	Submitted		Action*

Below the table, it says 'Showing 1 to 1 of 1 entries'. At the bottom left, it says 'ESCAES 2020' and at the bottom right, it says 'Week 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

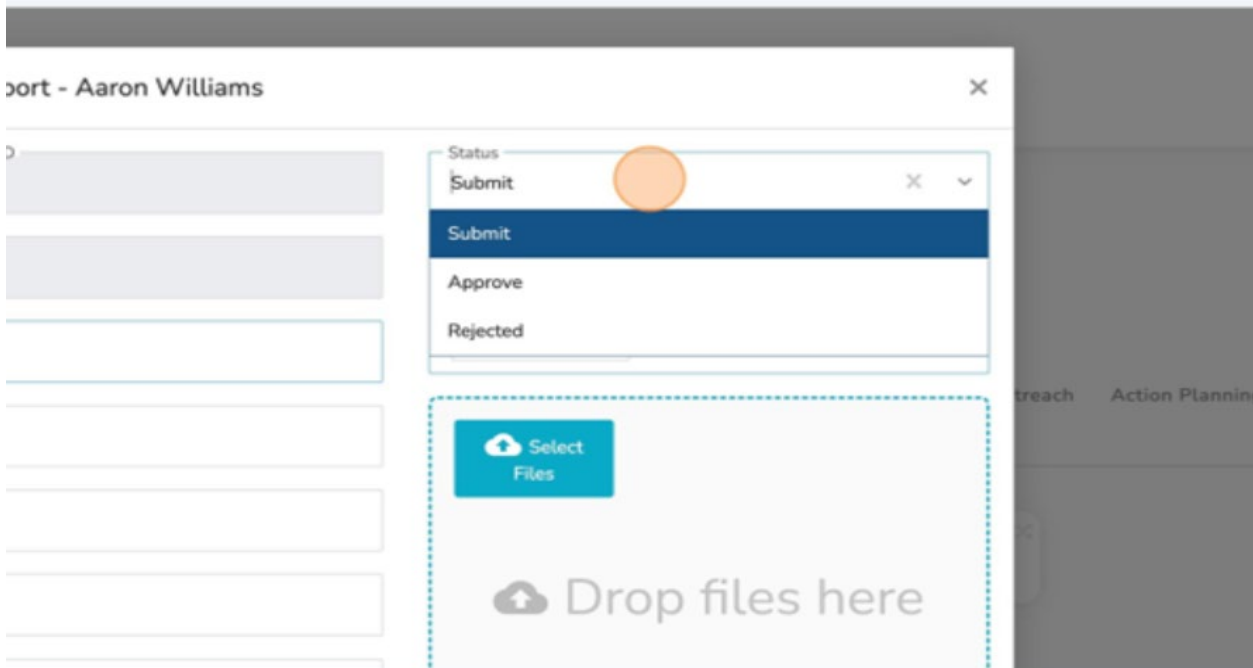
Client Support has been submitted

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

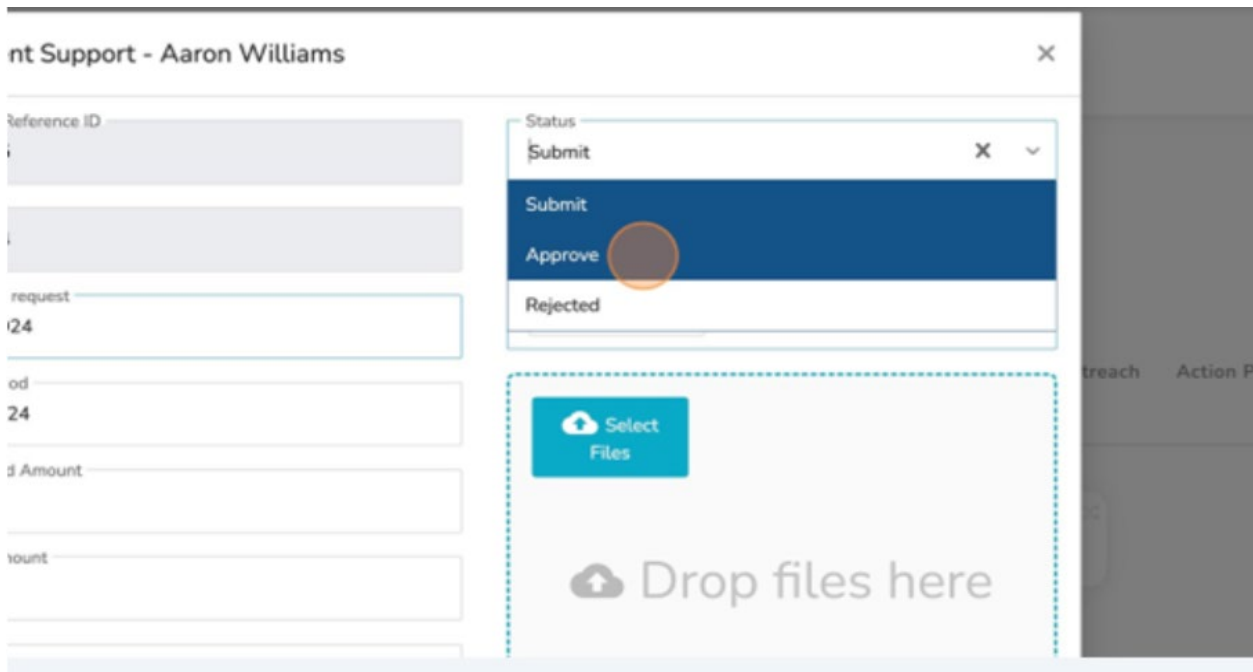
Review Request

[https://serco-sandbox.escases.ca/app/client/1110/
serviceplan/1080/program/es?tab=9&clientSupportId=116](https://serco-sandbox.escases.ca/app/client/1110/serviceplan/1080/program/es?tab=9&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. The date 22 is highlighted in blue. An orange circle is drawn around the date 22 in the calendar.

Personal Reference ID	Status
736375	Approve

AP #	Case Manager
524694	JobCoach Thomas

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

Fiscal Period	Approved Date
2023-2024	

Committed Amount
0.00

Actual Amount
0

IST

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 pop-up now closed. The date 22 is now entered into the "Approved Date" field. A blue dashed box highlights the date 22 in the calendar pop-up.

Personal Reference ID	Status
736375	Approve

AP #	Case Manager
524694	JobCoach Thomas

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

Fiscal Period	Approved Date
2023-2024	03/22/2024

Committed Amount
0.00

Actual Amount
0

IST

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
24	25	26	27	28	29	30
31	1	2	3	4	5	6

6. Click "Submit."

A screenshot of a web application showing a modal dialog box for submitting a request. The dialog box is white and has a close button (X) in the top right corner. It contains a large text input field with the text "Receipt(s)" and a dropdown menu below it showing "ja - Downsview - SSM". At the bottom of the dialog box are two buttons: "Submit" (highlighted with a red circle) and "Cancel". The background is a blurred view of a client profile page with a table header including "Approved Date".

The "Client Support" has been approved.

A screenshot of the ESCASES web application interface. The page displays the profile for Aaron Williams. The left sidebar contains navigation icons for Task Management, Add New Client, Calendar, Employee and Trainer, Client Management, and Care Explorer. The main content area shows the client's profile with tabs for Client Info, Interventions, Service Plan, EAP Detail, Outcomes, Checkpoints, Documents, Case Note, Task / Outreach, Action Planning Tool, JMH Metrics, and Placements. Under the Client Support tab, there are summary cards for "Total Support Request" (\$200.00) and "Total Support Actual" (0.00). Below these is a table with the following data:

#	Date Fund request	Supports Request	Supports Actual	Site	Status	Approved Date	Actions
1	21-Mar-2024	\$100.00	50.00	5318A	Approved	22-Mar-2024	Actions *

At the bottom of the table, it says "Showing 1 of 1 entries". The page footer includes the date "Build 2024" and a user profile icon.

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

Client Support has been approved

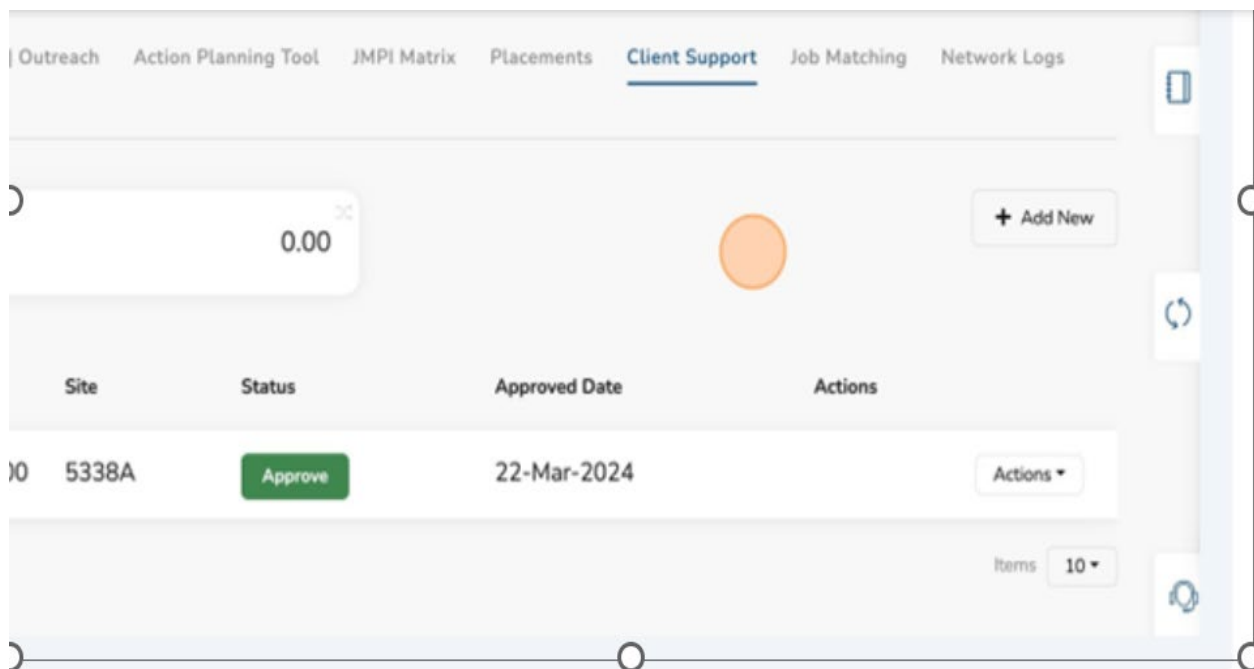
Client Name : Aaron Williams
Job seeker -
Support Type : Accommodation needs - assistive devices and adaptive technology
Item Description : This is a description of the XYZ device.
Rational : This device is required for ABCD.
Committed Amount : 200
Actual Amount : 0
HST : 0
General/ODSP : General Support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

Review Request
<https://serco-sandbox.escases.ca/aop/client/1110/serviceplan/1080/program/ies?tab=6&clientSupportId=116>

Canada  Ontario 

Completing an Approved Client Support

1. Select the client support.

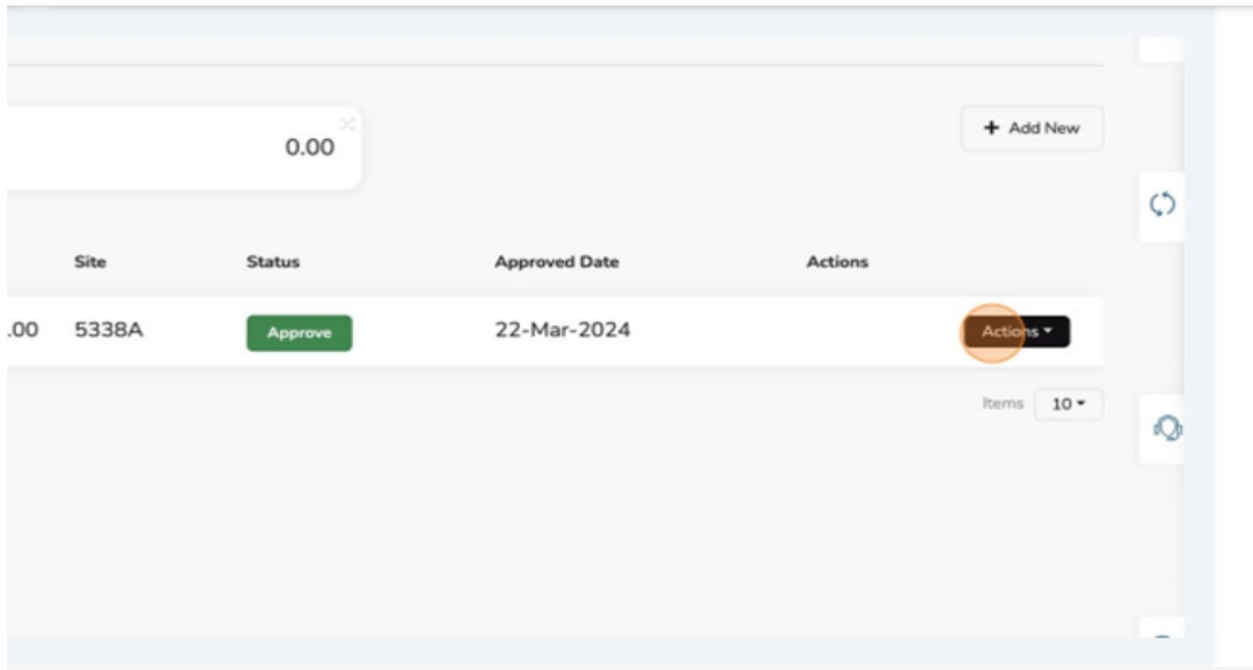


The screenshot shows a web application interface for 'Client Support'. At the top, there are navigation tabs: Outreach, Action Planning Tool, JMPI Matrix, Placements, Client Support (selected), Job Matching, and Network Logs. Below the tabs is a search bar with the value '0.00' and a '+ Add New' button. A table displays the following data:

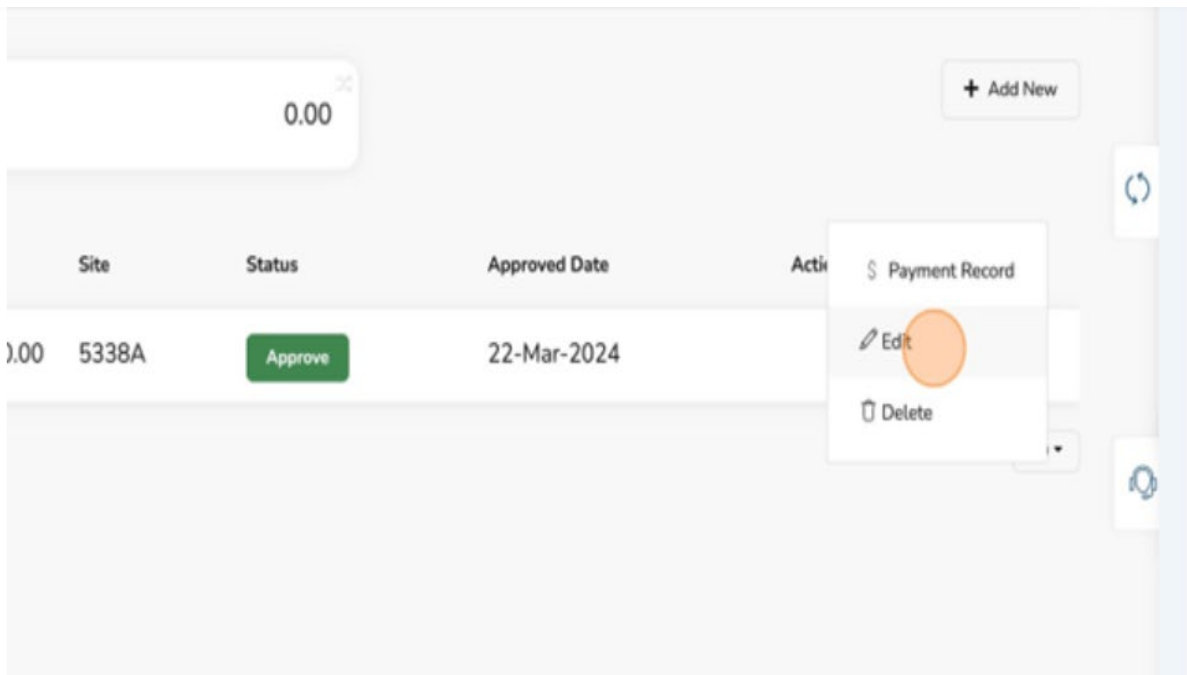
Site	Status	Approved Date	Actions
10 5338A	Approve	22-Mar-2024	Actions ▾

At the bottom right, there is a 'Items' dropdown menu set to '10'.

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. An orange circle highlights the 'Actual Amount' field.

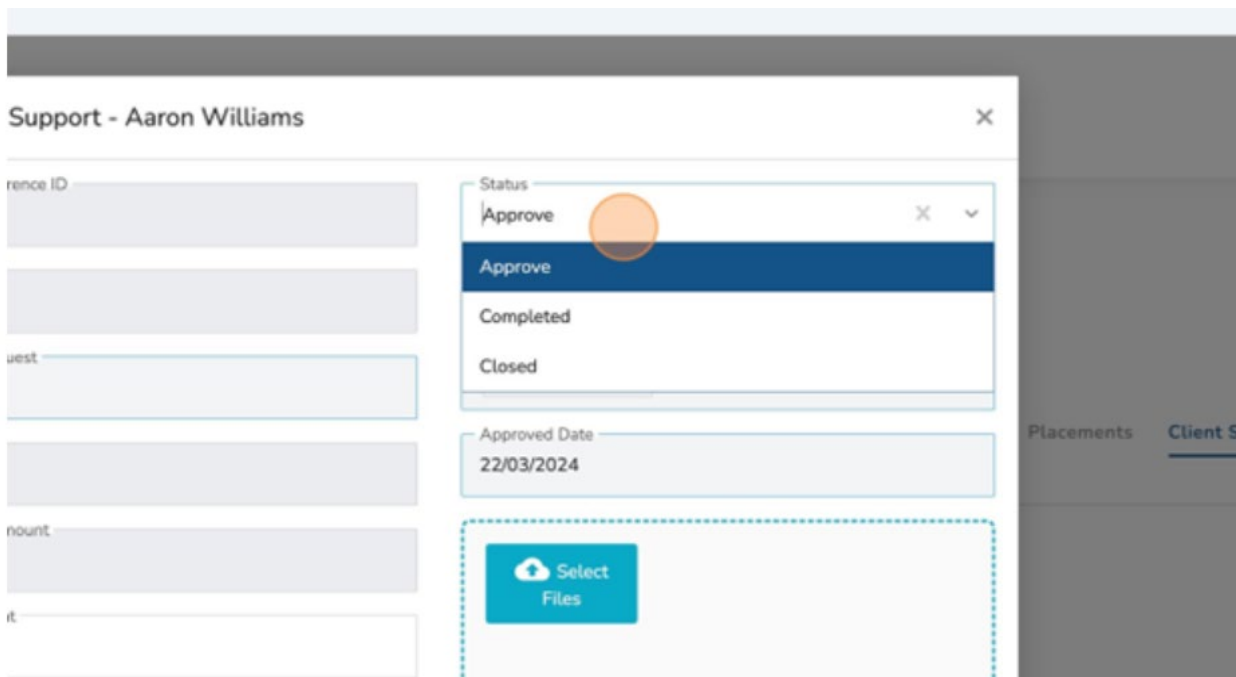
5. Input the appropriate "Actual Amount."

6. Click the "HST" field.

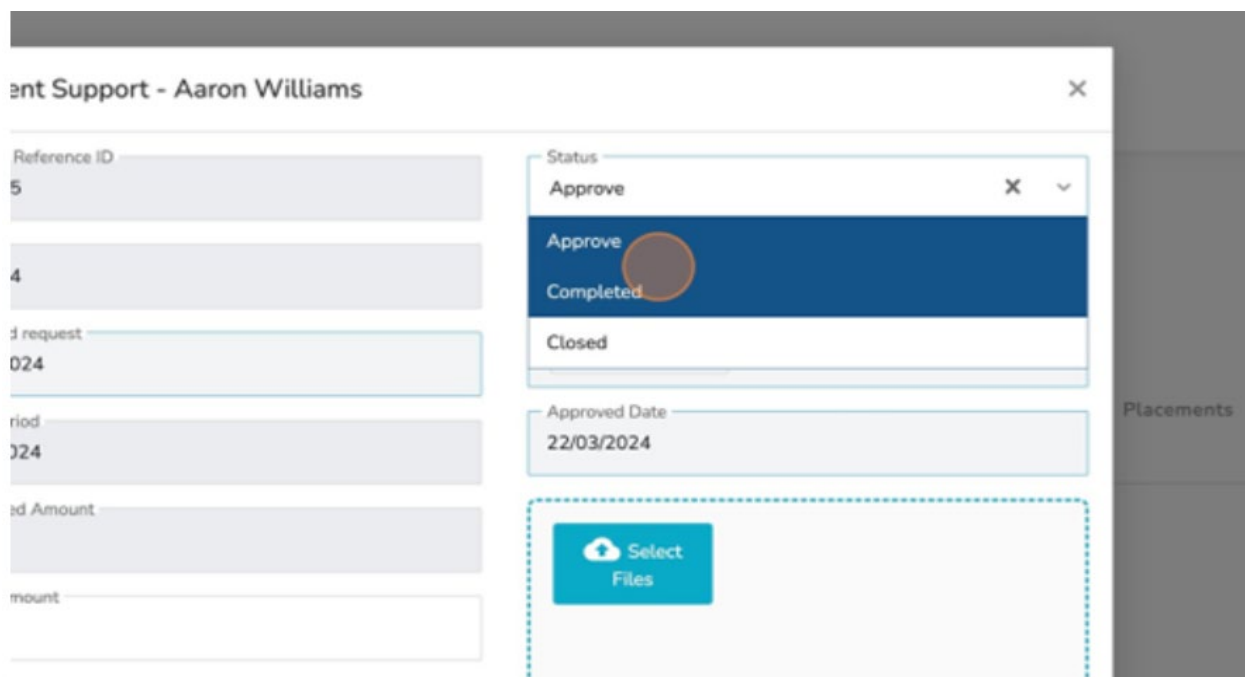
This screenshot shows the same web form as above, but with updates. The 'Actual Amount' field now contains the value '150'. The 'HST' field is highlighted with an orange circle. The 'Support Type' and 'Rationale' fields remain the same. The 'Assign To' and 'Approved Date' fields are also visible on the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

7. Input the appropriate "HST" amount.

8. Click the "Status" field.



9. Click "Complete."



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

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.

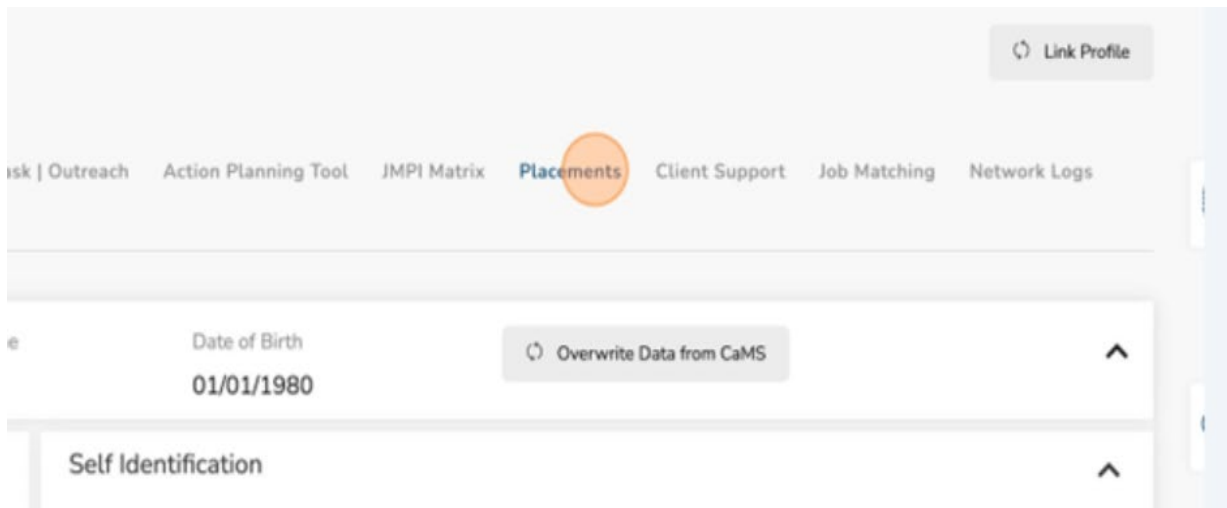
The screenshot shows a web application interface for client support. On the left is a sidebar with navigation icons for 'Task Management', 'Add New Client', 'Calendar', 'EAP', 'EAP Management', 'EAP Support', 'EAP and Support', and 'Contact'. The main content area is titled 'Client Profile' for 'Aaron Williams'. It includes a 'Client Info' section with tabs for 'Client Info', 'Interventions', 'Service Plan', 'EAP Detail', 'Outcomes', 'Checkpoints', 'Documents', 'Case Notes', 'Task / Dashboard', 'Action Planning Tool', 'EAP History', 'Placements', 'Client Support', 'Job Working', and 'Networks Log'. 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 22-Mar-2024 with a status of 'Completed'. The table has columns for '#', 'Date of request', 'Supports Request', 'Supports Actual', 'Site', 'Status', 'Approval Date', and 'Action'. The entry shows 1 request for \$200.00, with 200.00 supports actualized at site \$338A, on 22-Mar-2024.

#	Date of request	Supports Request	Supports Actual	Site	Status	Approval Date	Action
1	22-Mar-2024	\$200.00	200.00	\$338A	Completed	22-Mar-2024	Action

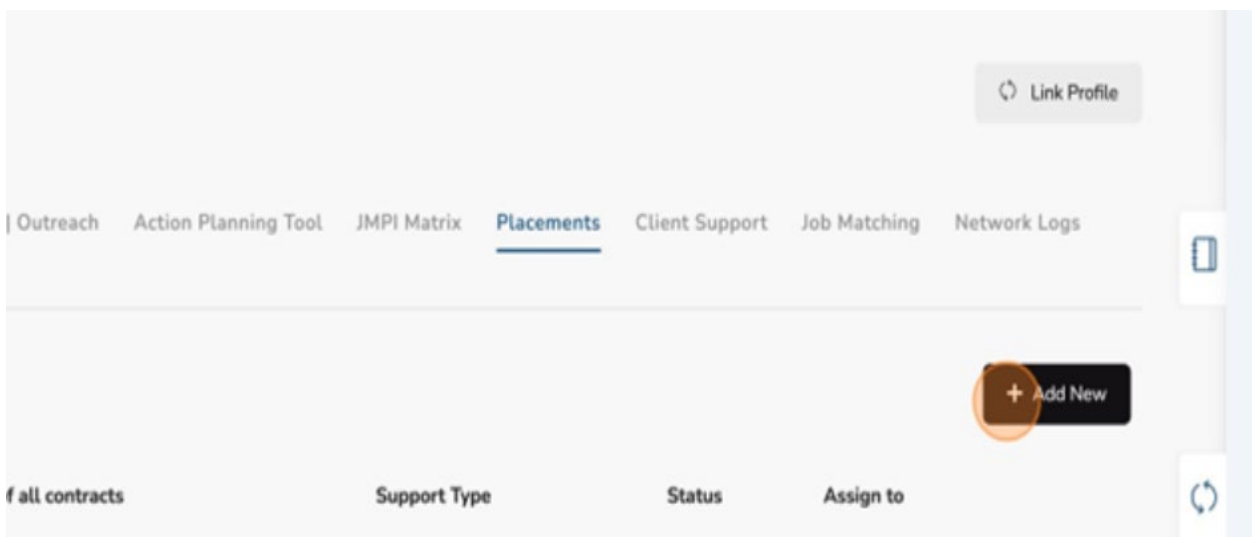
(20) Placements

✓ 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/ODSP)

Status

Note

5. Select the Employer for the placement.

Bare Min.
⚠ Missing employer reference number

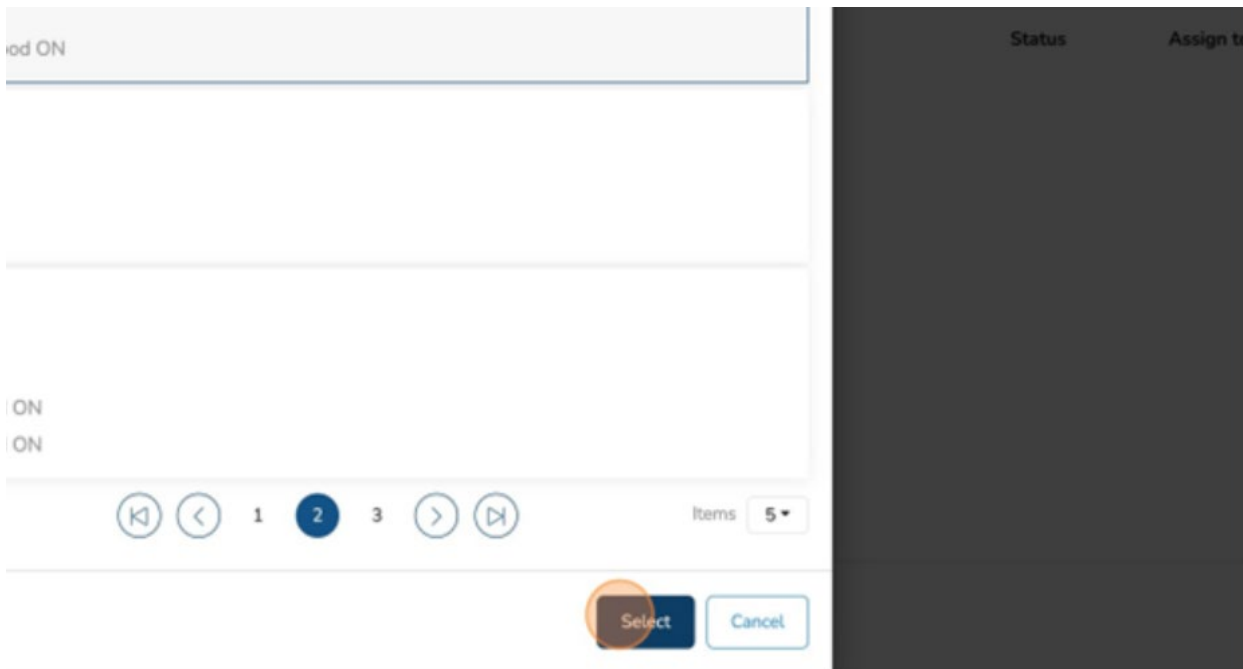
ESCASES Inc.
ESCASES Inc.
⚠ Missing employer reference number

Fake Store that Sells Stuff
⚠ Missing employer reference number

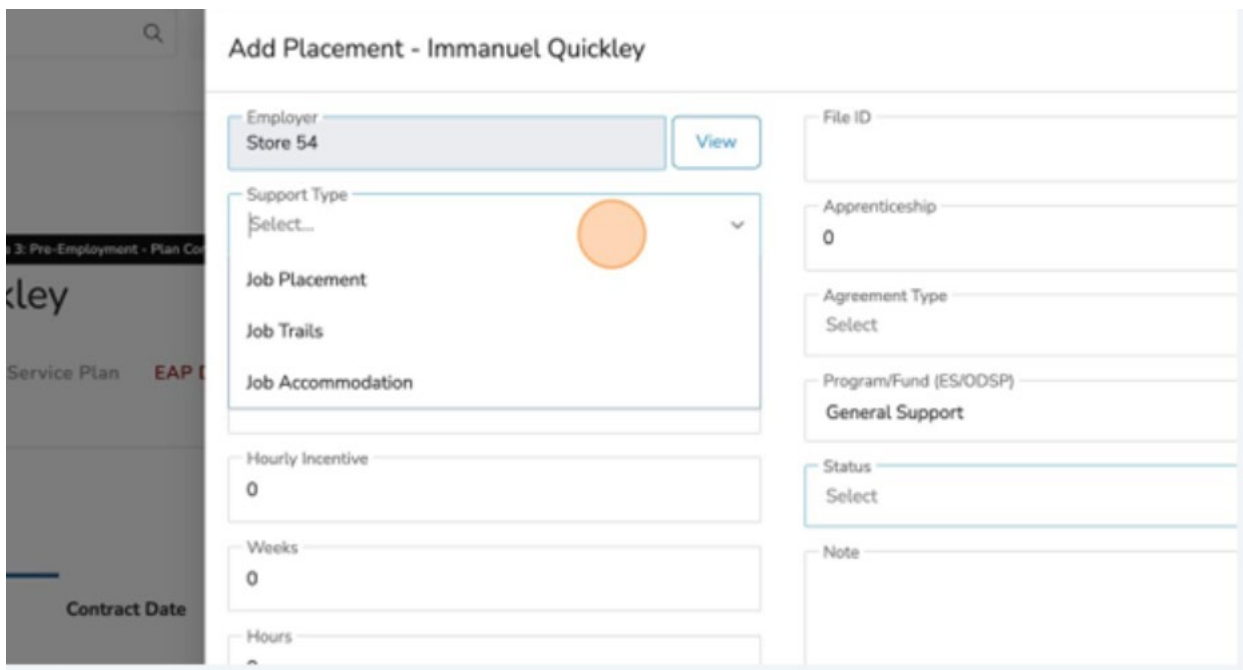
Fill company
Fill company
⚠ Missing employer reference number

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."

The screenshot shows a web form titled "Add Placement - Immanuel Quickley". The form is divided into several sections. On the left, there is a sidebar with a search icon and a list of items including "Service Plan" and "EAP". The main form area contains the following fields:

- Employer:** Store 54 (with a "View" button)
- Support Type:** A dropdown menu is open, showing three options: "Job Placement" (highlighted in blue), "Job Trails", and "Job Accommodation".
- File ID:** (empty)
- Apprenticeship:** 0
- Agreement Type:** Select
- Program/Fund (ES/ODSP):** General Support
- Status:** Select
- Note:** (empty)
- Hourly Incentive:** 0
- Weeks:** 0
- Hours:** (empty)

9. Click the "Contract Date" field.

The screenshot shows the same web form as above, but with the "Contract Date" field highlighted. The "Support Type" dropdown menu is now closed, and "Job Placement" is selected. The "Contract Date" field is empty and has an orange circle highlighting it. The other fields remain the same as in the previous screenshot.

10. Select the appropriate "Contract Date."

The screenshot shows a web form with a calendar for March 2024. The date 21 is highlighted with an orange circle. 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

There is also a "Select Files" button and a "Drop f" area at the bottom right.

11. Click the "Hourly Wage" field.

The screenshot shows a web form with the following fields:

- Employer: Store 54 (View button)
- Support Type: Job Placement (X button)
- Contract Date: 21/03/2024
- Hourly Wage: 0 (highlighted with an orange circle)
- Hourly Incentive: 0
- Weeks: 0
- Hours: 0
- Committed Amount: \$0
- File ID: (empty)
- 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

Agreemen
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 and a light main area on the right. The sidebar has tabs for 'Client Info', 'Interventions', 'Service Plan', and 'EAP'. Below the tabs are 'Thrive' and 'Case Audit' options. 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 in the form: 'Hours' is now 320, 'Committed Amount' is \$1,280, and 'Actual Amount' is still \$0. The 'Assign to' field is now 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.

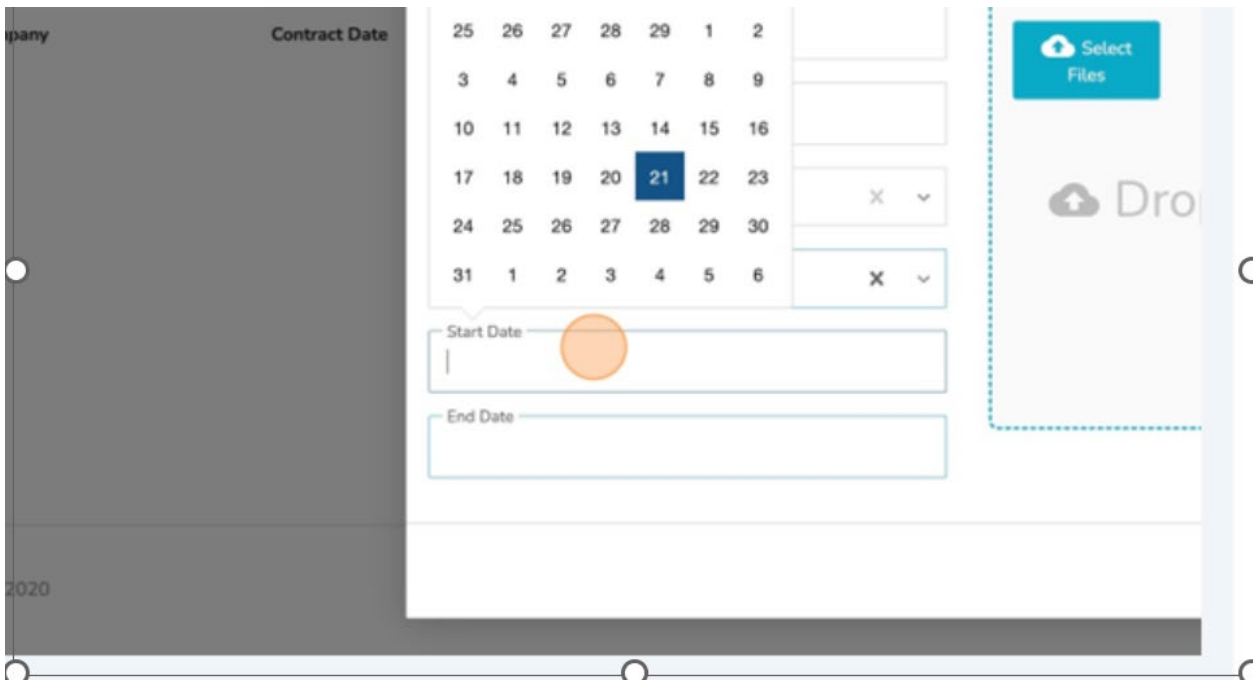
20. Select the "Site ID" field.

A screenshot of a web form. On the left is a dark grey sidebar with 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" area with an upward arrow icon.

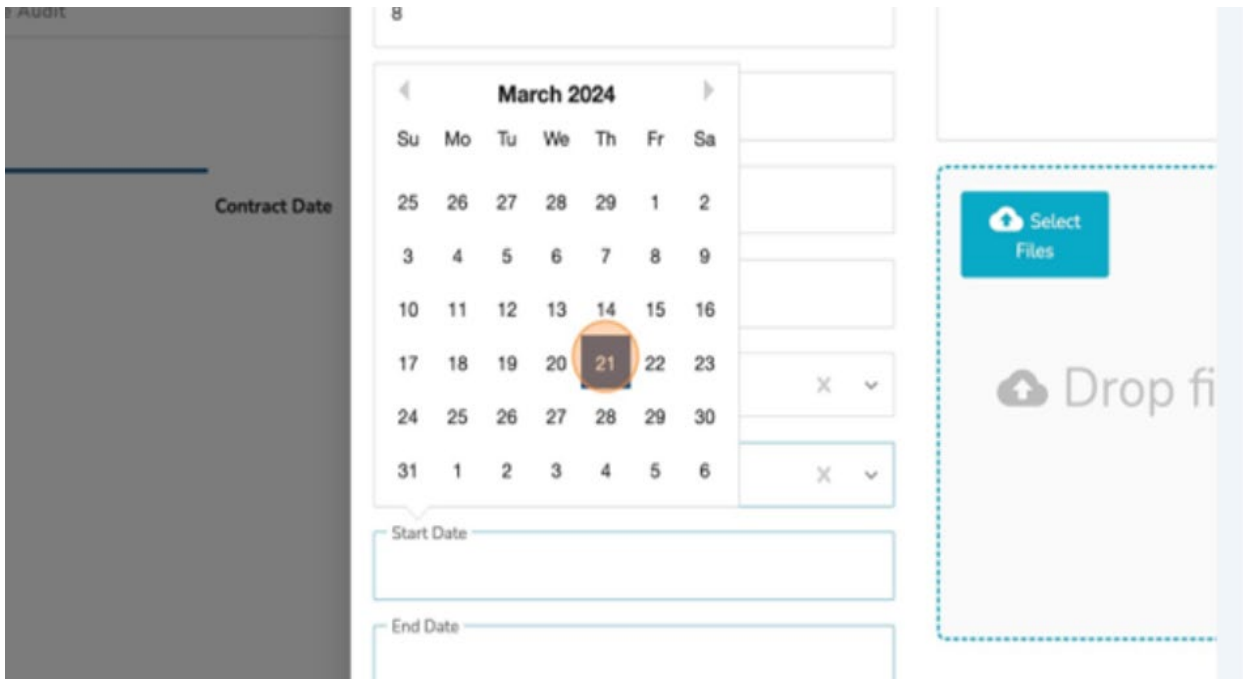
21. Select the appropriate "Site ID."

A screenshot of the same web form as above. The "Site ID" dropdown menu is now open, showing the "5338A" option highlighted in a dark blue bar with an orange circle. The "Select" option is no longer visible. The rest of the form and the file upload area remain the same.

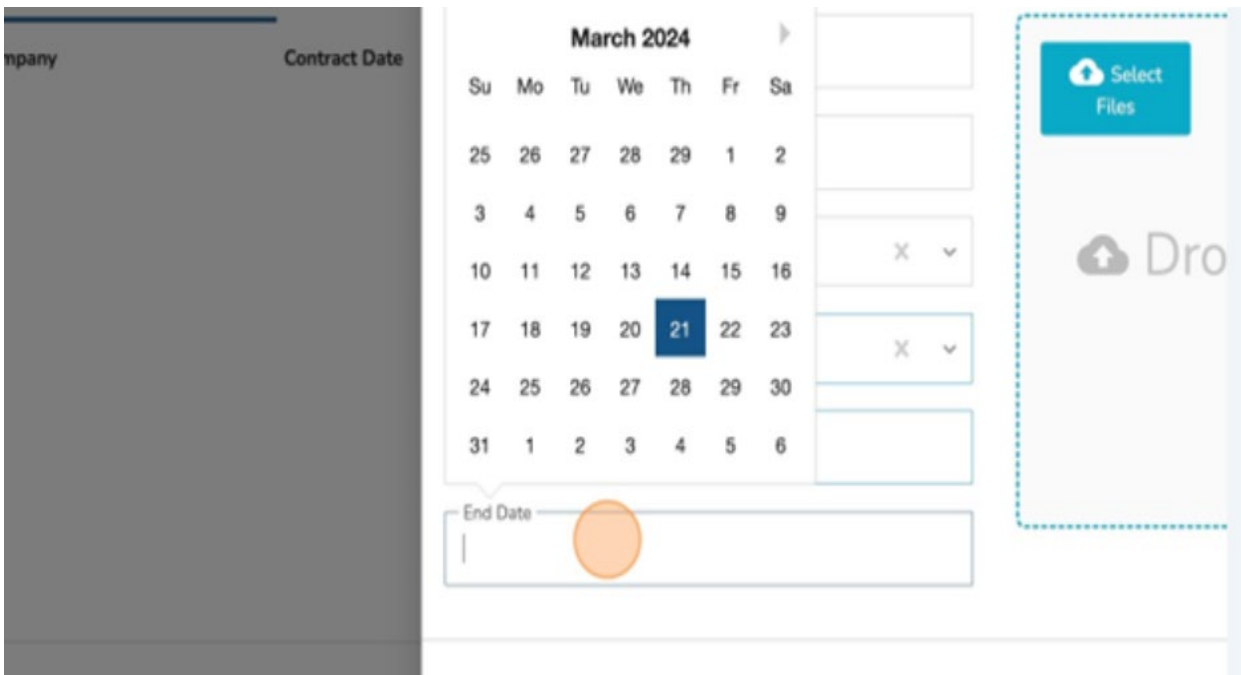
22. Select the "Start Date" field.



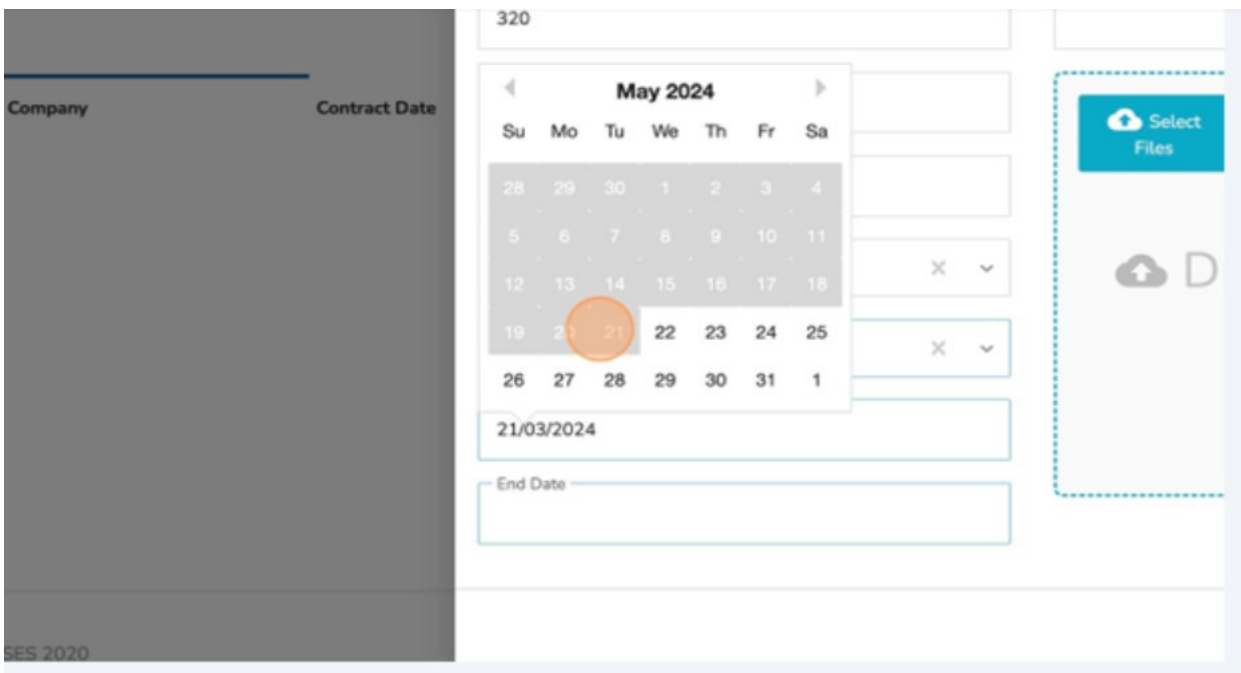
23. Select the appropriate "Start Date."



24. Click the “End Date” field.



25. Select the appropriate “End Date.”



26. Click "Agreement Type."

Placement - Immanuel Quickley

Employer: [Employer Name] 54 View

Placement Type: Placement

Start Date: 03/2024

Hourly Wage: _____

Hourly Incentive: _____

Skills: _____

Notes: _____

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 Name] 54 View

Placement Type: Placement

Start Date: 3/2024

Hourly Wage: _____

Hourly Incentive: _____

Skills: _____

Notes: _____

File ID: _____

Apprenticeship: 0

Agreement Type: **Select**

- Placement with Incentive
- Test and Hire

Status: Select

Note: _____

28. Click the "Status" field.

A screenshot of a web form with two columns of input fields. The left column contains fields for Report Type (Placement), Contract Date (10/03/2024), Hourly Wage (0), Hourly Incentive, Weeks, and Hours (20). The right column contains fields for Apprenticeship (0), Agreement Type (Placement with Incentive), Program/Fund (ES/ODSP) (General Support), and Status. The Status dropdown menu is open, showing options: Select, Job Searching, Placed, Employed, and Quit. An orange circle highlights the 'Status' field label and the 'Placed' option.

29. Select the appropriate "Status."

A screenshot of the same web form as above, but with the 'Placed' option selected in the Status dropdown menu. The 'Placed' option is highlighted with a dark blue background and an orange circle. The other fields remain the same: Report Type (Placement), Contract Date (10/03/2024), Hourly Wage (0), Hourly Incentive, Weeks, Hours (20), Apprenticeship (0), Agreement Type (Placement with Incentive), Program/Fund (ES/ODSP) (General Support), Committed Amount (1,280), Actual Amount (0), and Assign to (Manager Thomas). A 'Drop files here' area is visible at the bottom of the form.

30. Click the "Note" field.

The screenshot shows a web form with the following fields and values:

- Intract Date: 1/03/2024
- Hourly Wage:)
- Hourly Incentive:
- Weeks:
- Hours: 20
- Submitted Amount: 1,280
- Actual Amount:)
- Assign to:
- Agreement Type: Placement with Incentive
- Program Fund (ES/ODSP): General Support
- Status: Placed
- Note: (An orange circle is placed over the text input area.)
- File Upload: A dashed blue box contains a "Select Files" button and the text "Drop files here".

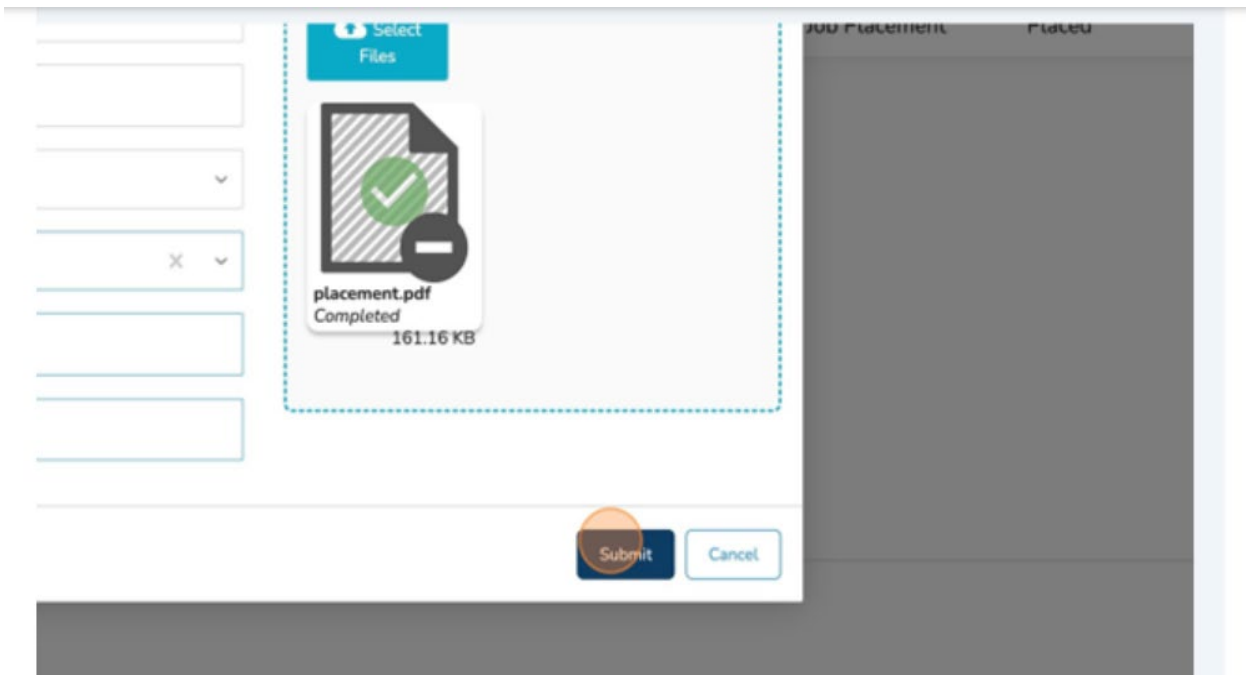
31. Insert the appropriate "Note."

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

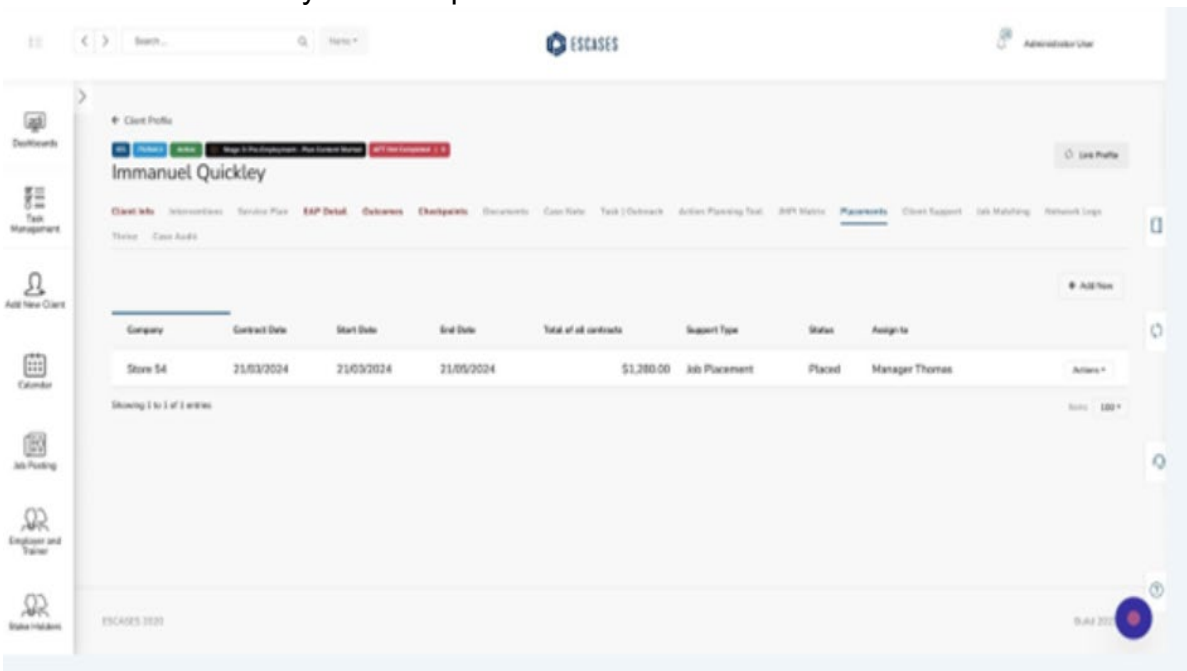
The screenshot shows the same web form with the following updates:

- Note: This is placement stuff
- File Upload: The "Select Files" button is highlighted with a yellow circle.

33. Click "Submit."



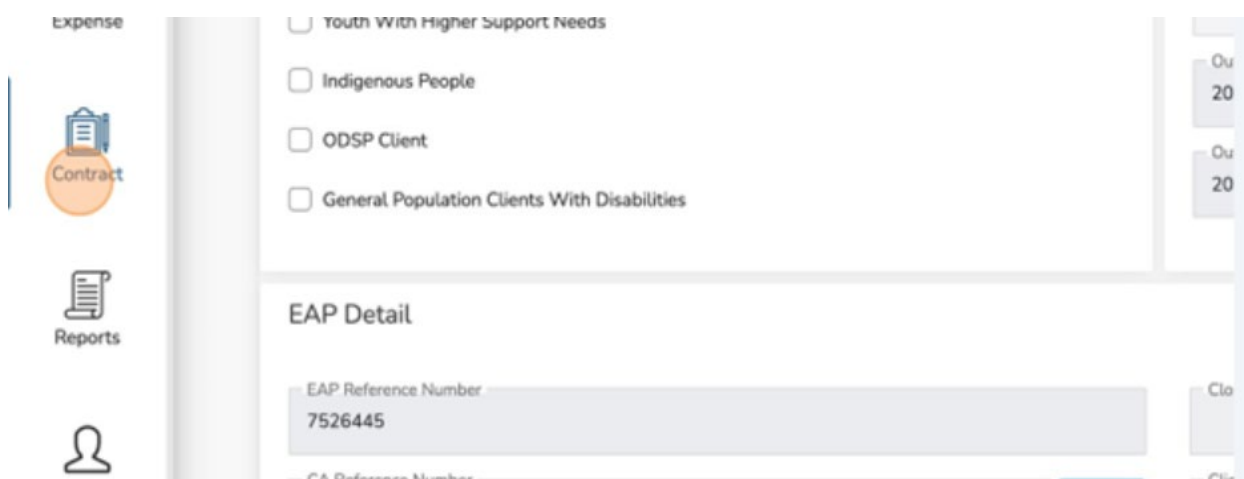
You have successfully added a placement.



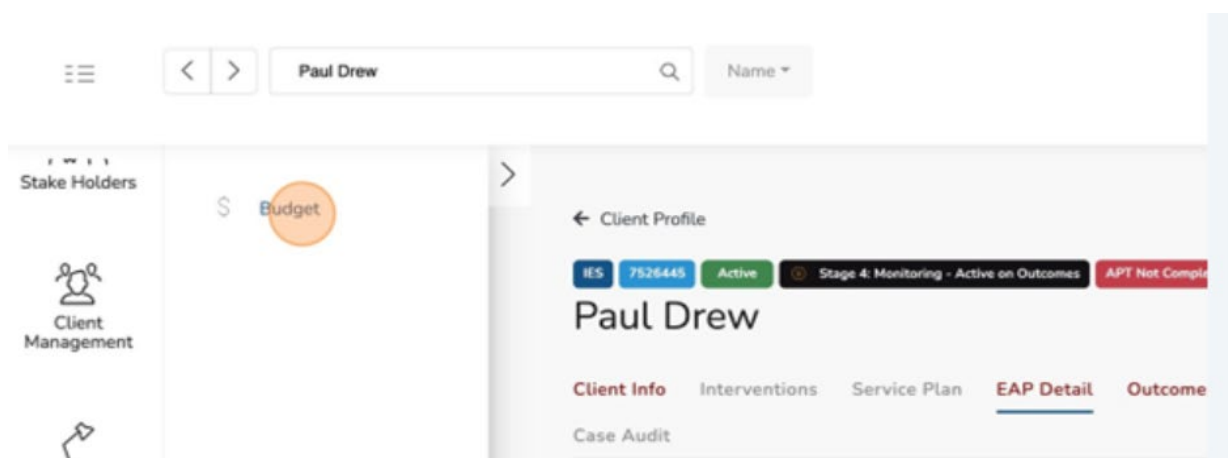
(21) Budget Settings - Contract

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

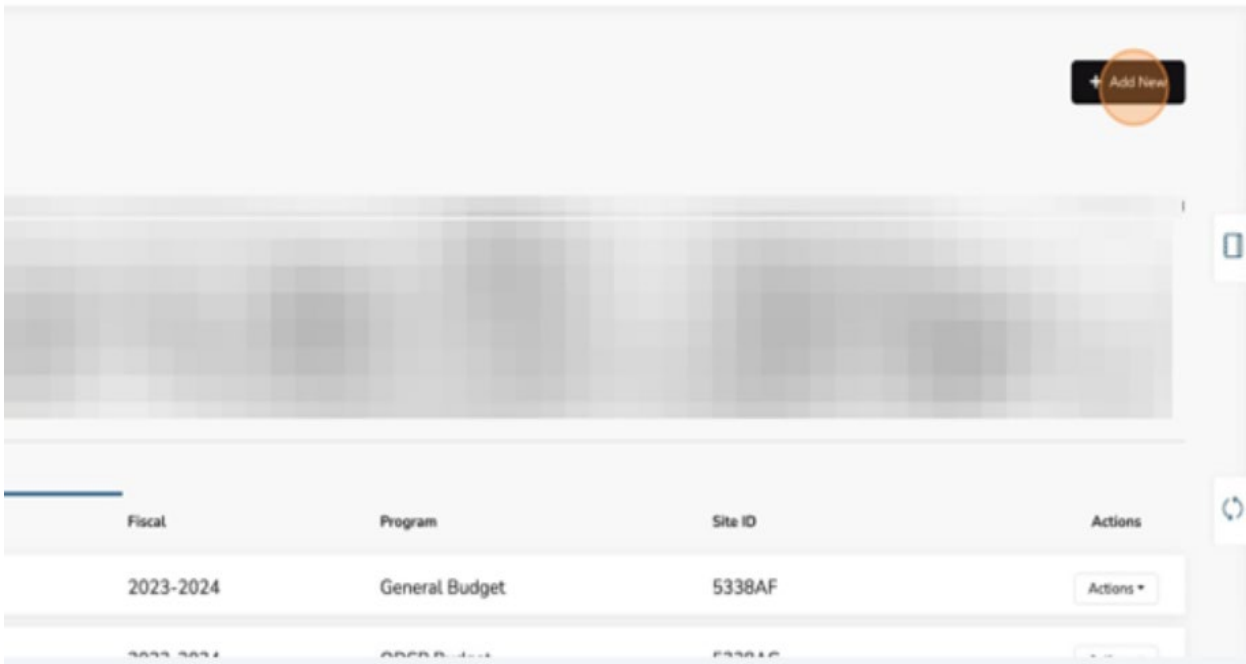
1. Click on the three lines at the top left-hand corner.
2. Click “Contract” on the left navigation bar.



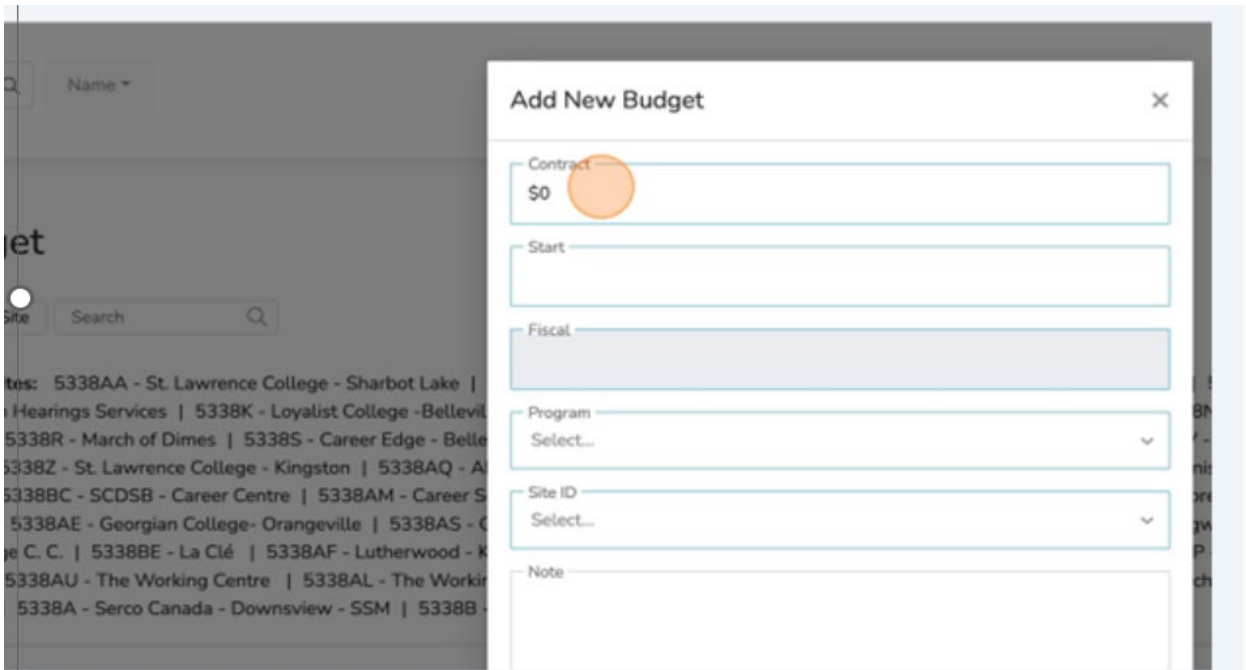
3. Click “Budget.”



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 the following 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.

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 -

Contract: \$1,000,000.00

Start

Fiscal

Program: Select...

Site ID: Select...

Note

8. Select the appropriate "Start Date."

The screenshot shows the same web interface as above, but with a calendar open for April 2024. The calendar is displayed over the Start field, and the date '1' is highlighted with an orange circle. The calendar shows the days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and the dates from 1 to 30.

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

9. Select the "Program" field.

Contract
\$1,000,000.00

Start
01/04/2024

Fiscal
2024-2025

Program
Select...

Site ID
Select...

Note

Search

5338AA - St. Lawrence College - Sharbot Lake |
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
- Career E
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

Note

Search

5338AA - 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
- Caree
nisfil |
real |
ywood |
P - Regi
chner |

Contract

Prog

11. Click the "Site ID" field.

The screenshot shows a form with the following fields:

- Amount: \$1,000,000.00
- Start: 01/04/2024
- Fiscal: 2024-2025
- Program: ODSP Budget
- Site ID: Select... (highlighted with an orange circle)
- Note: (empty text area)

On the left, a list of contract entries is visible, including:

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

12. Select the appropriate "Site ID."

The screenshot shows a table with a dropdown menu for Site ID. The dropdown is open, showing a list of Site IDs with 5338A highlighted. The table has the following columns:

#	Contract	Amount	Start	Fiscal
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

The dropdown menu for Site ID shows the following options:

- 5338AL
- 5338BG
- 5338AG
- 5338AV
- 5338AH
- 5338BD
- 5338A (highlighted)
- 5338B

13. Click "Submit."

The screenshot shows a modal form for adding a new budget. The form contains a 'Site ID' dropdown menu with '5338A' selected, and a 'Note' text area. At the bottom of the form are 'Submit' and 'Cancel' buttons. The background is a table of existing budgets:

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 table of budget entries. The table has columns for Contract, Start, Fiscal, Program, Site ID, and Actions. A new entry is highlighted with an orange circle:

Contract	Start	Fiscal	Program	Site ID	Actions
1	01/04/2024	2024-2025	ODSP Budget	5338A	Actions*

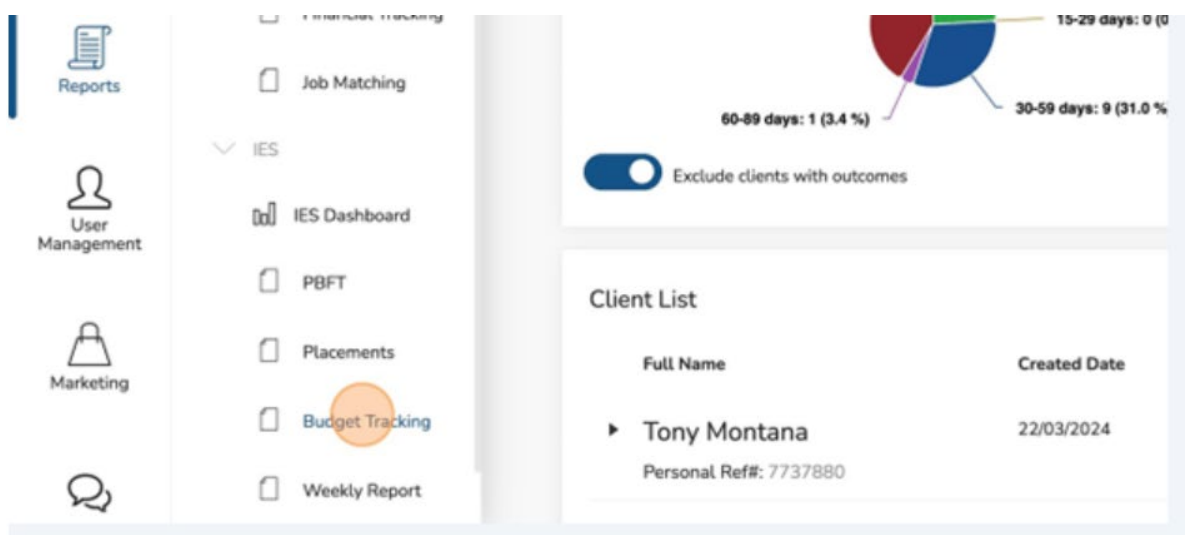
(22) Budget Tracking Report

- ✓ 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
10,923	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

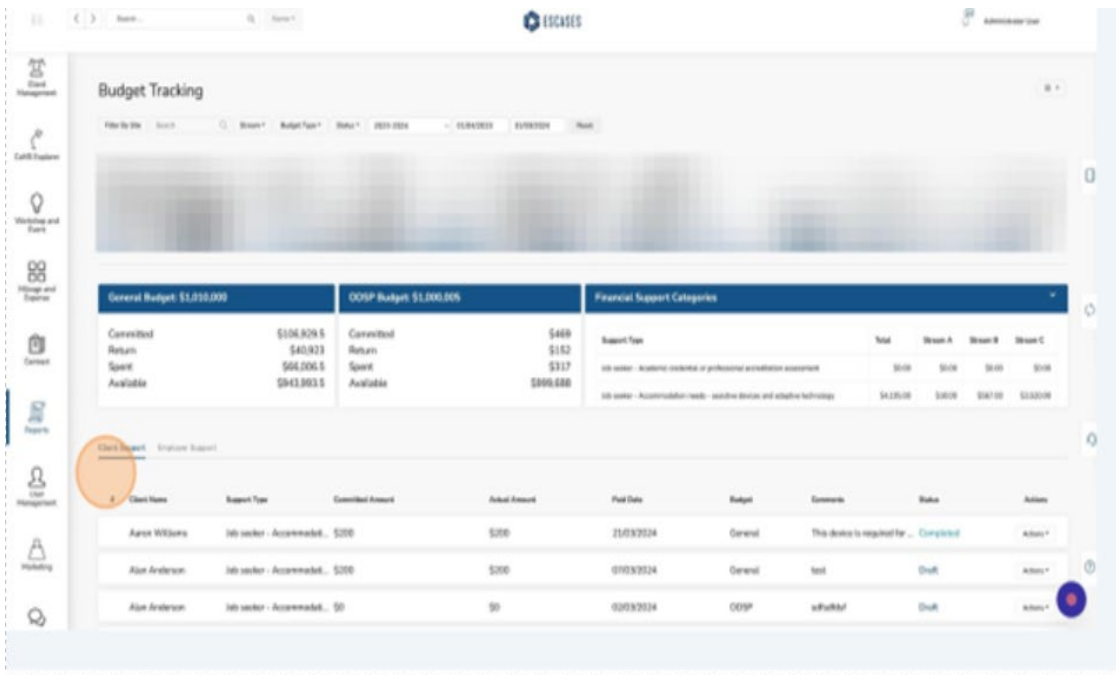
Support Type	Total	Stream A	Stream B	Stream C
Job seeker - Academic credential or professional accreditation assessment	\$0.00	\$0.00	\$0.00	\$0.00
Job seeker - Accommodation needs - assistive devices and adaptive technology	\$4,105.00	\$18.00	\$567.00	\$3,520.00

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

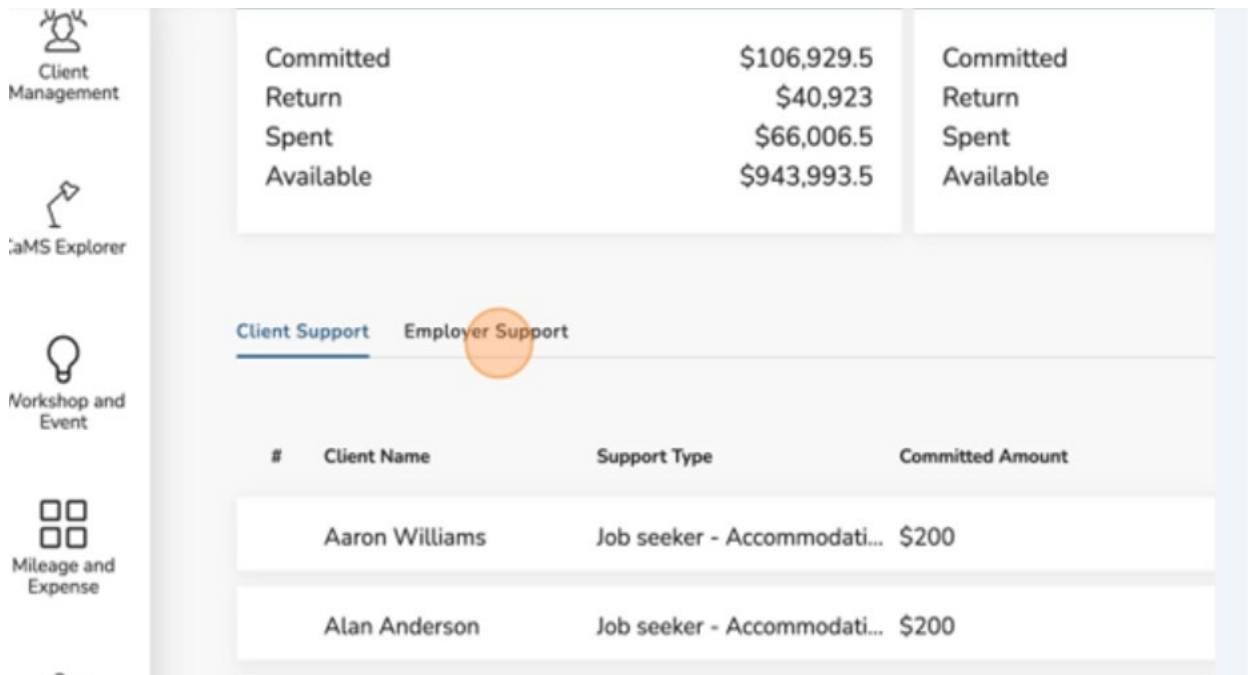
Financial Support Categories

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	\$4,105.00	\$18.00	\$567.00	\$3,520.00
Job seeker - Accommodation needs - job-specific communication skills training	\$12.00	\$0.00	\$0.00	\$12.00
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/Infrequent 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).



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



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

The screenshot shows the ESCASES dashboard with a sidebar on the left containing icons for Case Management, Client Profile, Working and Home, Storage and Paperwork, Contact, Reports, User Management, and Pending. The main content area is divided into three sections: General Budget (\$1,000,000), OOSP Budget (\$1,000,505), and Financial Support Categories. The Financial Support Categories table is partially expanded, showing columns for Support Type, Total, Stream A, Stream B, and Stream C. A chevron icon on the right side of the 'Financial Support Categories' header is circled in orange.

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

A full view of all Placement items will be displayed.

The screenshot shows the ESCASES dashboard with the 'Financial Support Categories' view expanded. The table displays 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

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 interface. At the top, there are three budget tracking tables:

General Budget: \$1,010,000		OOSP Budget: \$1,000,000		Financial Support Categories				
Committed	\$106,929.5	Committed	\$400	Support Type	Total	Stream A	Stream B	Stream C
Return	\$40,923	Return	\$152	Job Accommodation	\$0.00	\$0.00	\$0.00	\$0.00
Spent	\$66,006.5	Spent	\$317	Job Placement	\$10,000.00	\$0.00	\$0.00	\$0.00
Available	\$943,993.5	Available	\$999,688					

Below the tables is a table of placements:

#	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		\$1,005	\$1,005	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 2 Cnd	Job Placement	\$300	\$300	21/03/2024	General		Placed	Action

An orange circle highlights the 'Filter' button in the top left of the placement list area.

“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 heading "Budget Tracking" and a search bar. Below the search bar, there are filter options:

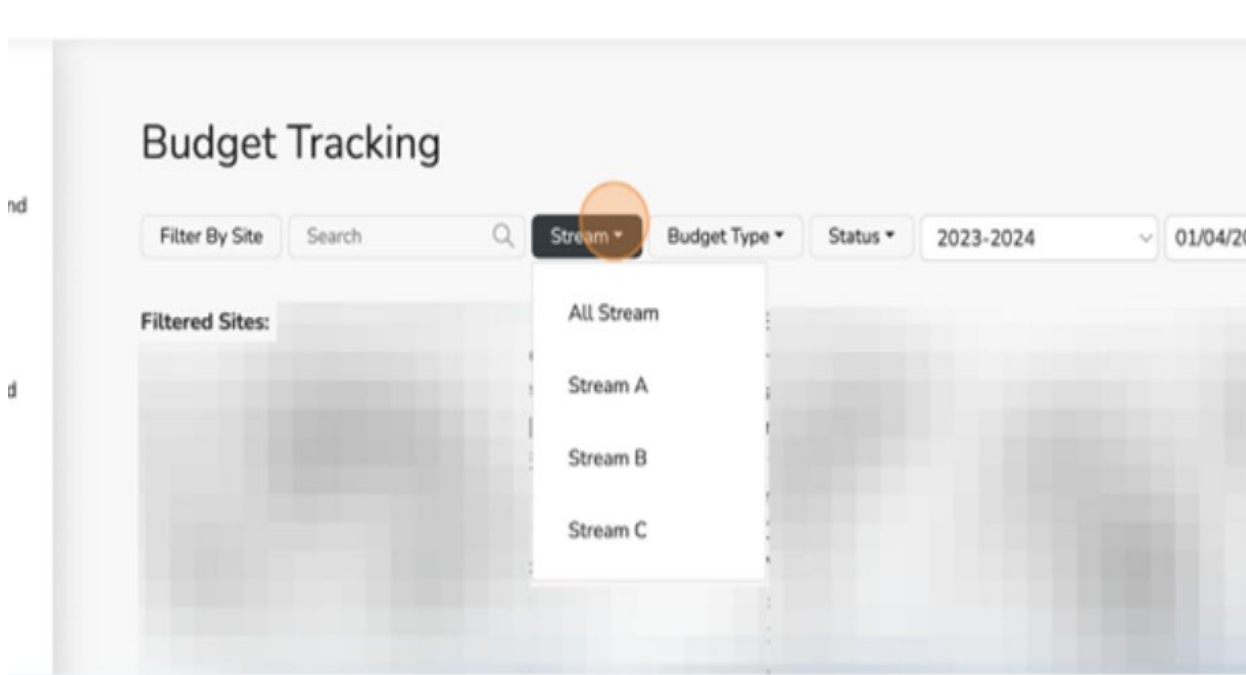
Filter By: Date, Search, Stream, Budget Type, Status, 2023-2024, 01/04/2023, 31/03/2024, Reset

An orange circle highlights the "Filter" button.

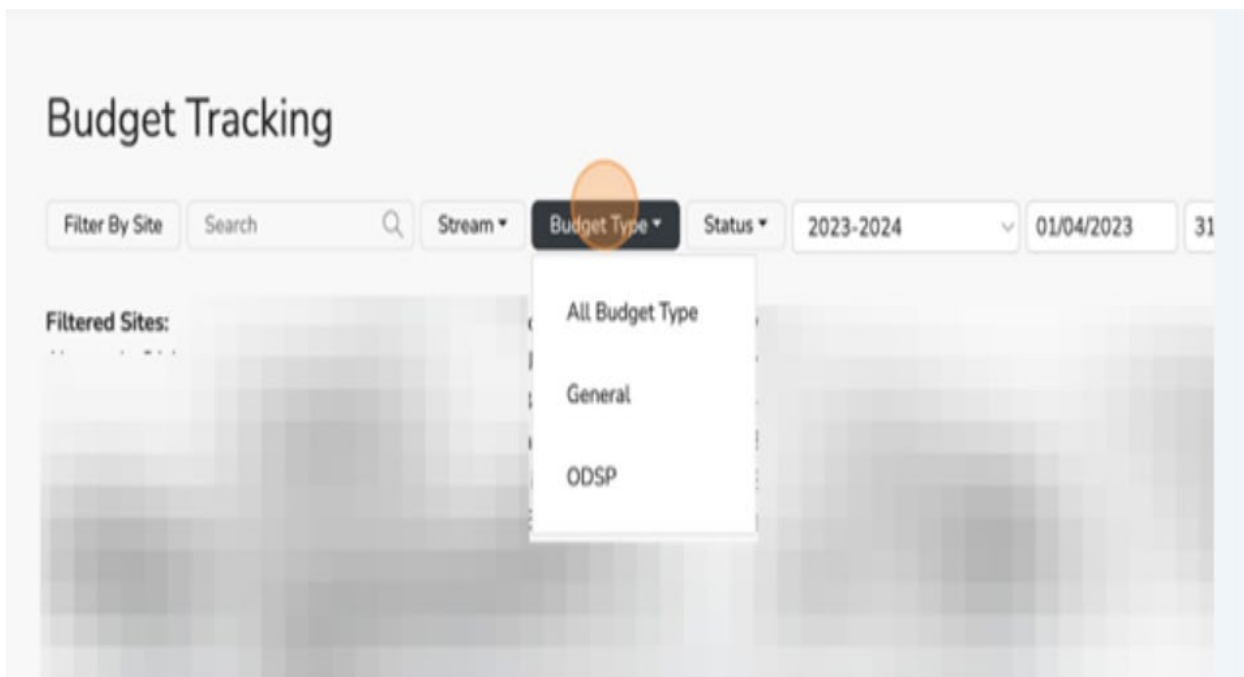
Below the filters, there is a section for "Filtered Show" which is currently empty. At the bottom of the page, there are three budget tracking tables:

General Budget: \$1,010,000		OOSP Budget: \$1,000,000		Financial Support Categories				
Committed	\$106,929.5	Committed	\$400	Support Type	Total	Stream A	Stream B	Stream C
Return	\$40,923	Return	\$152	Job seeker - Academic credential or professional accreditation assessment	\$0.00	\$0.00	\$0.00	\$0.00
Spent	\$66,006.5	Spent	\$317					
Available	\$943,993.5	Available	\$999,688					

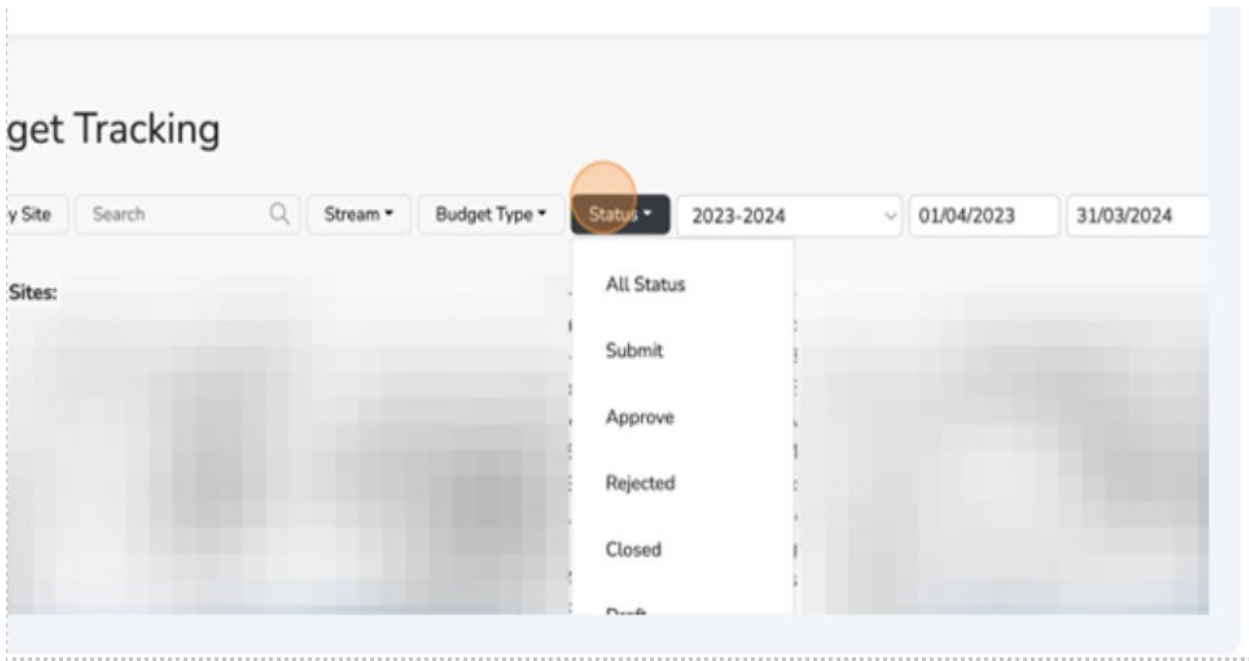
7. Click the “Stream” field to filter by stream.



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

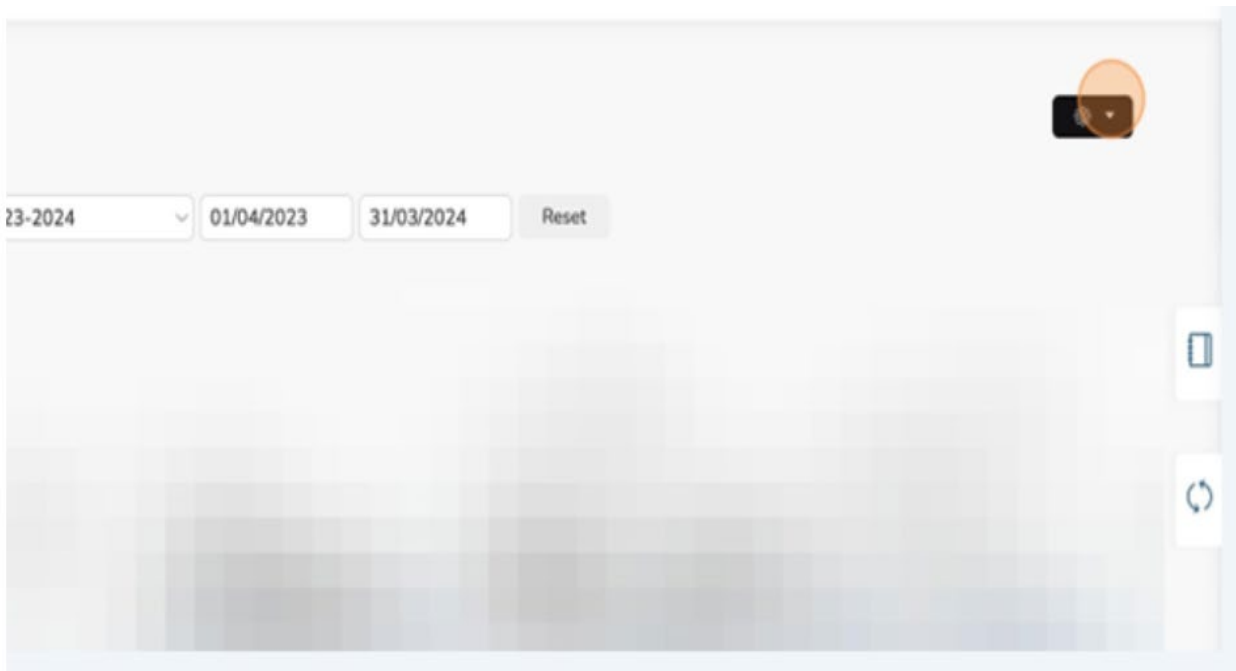


9. Click on "Status" to filter by "Status."

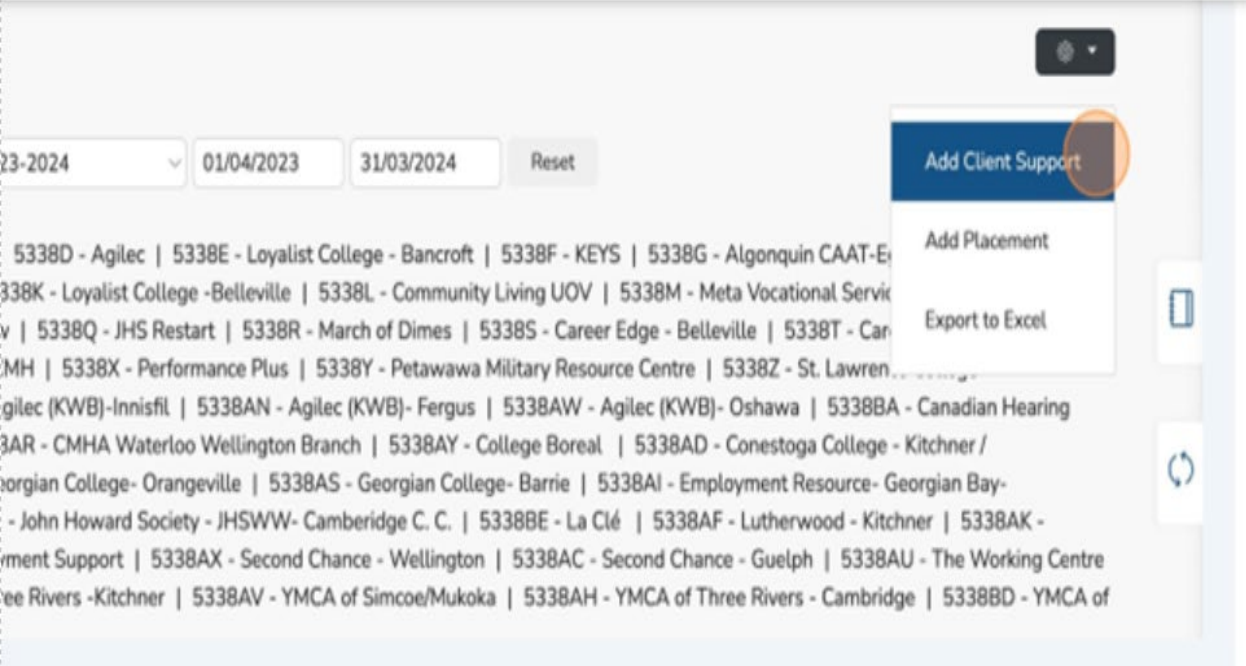


✓ You can also generate a Client Support or Placement by clicking the gear icon from the top right of the report.

10. Click the "Gear" icon.



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



(23) 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."

The screenshot shows a sidebar on the left with navigation icons: Workshop and Event, Mileage and Expense, Contract, and Reports (highlighted in orange). The main content area displays a table with the following data:

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."

The screenshot shows the same sidebar as above, but with the Reports icon expanded to show a sub-menu. The sub-menu items are: Referrals, Financial Tracking, Job Matching, IES (expanded), IES Dashboard, PBFT (highlighted in orange), and Placements. The main content area displays a table with the following data:

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 application interface for managing funding allocations. At the top, there are filters for 'Filter by All Streams', 'Filter by All Month', and 'Filter by Site'. Below this is a list of filtered sites. The main content area features a table with columns for 'Stream A', 'Stream B', 'Stream C', and 'Maximum Total per Candidate'. A 'Submit' button is highlighted with an orange circle. To the right of the table is a 'Funding Allocation' summary box showing 'Maximum Performance Based Funding' at \$20,000.00, 'Performance Based Funding Earned' at \$4,000.00, and 'Remaining Performance Based Funding Available' at \$16,000.00. Below the table is a 'Go Back' button and a table with columns for 'Client Name', 'EAP Reference Number', 'Case Manager', 'Stream', 'EAP Outcome Date', and 'PBF Available'.

	1 Month	3 Month	6 Month	12 Month	Maximum Total per Candidate
Stream A	\$1.00	\$3.00	\$6.00	\$6.00	\$16.00
Stream B	\$20.00	\$60.00	\$60.00	\$180.00	\$180.00
Stream C	\$60.00	\$180.00	\$170.00	\$140.00	\$1,080.00

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

The screenshot shows a 'Stream PBF' modal form overlaid on the main application. The form has 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: Stream A (1: 1, 3: 3, 6: 6, 12: 6), Stream B (1: 20, 3: 60, 6: 60, 12: 180), and Stream C (1: 60, 3: 180, 6: 170, 12: 140). A 'Submit' button is highlighted with an orange circle. The background shows the same 'Funding Allocation' table and 'Funding Allocation' summary box as in the previous screenshot.

	1 Month	3 Month	6 Month	12 Month
Stream A	1	3	6	6
Stream B	20	60	60	180
Stream C	60	180	170	140

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

Performance Based Funding Tracker

Filter by All Stream • Filter by All Month • Filter by Site 2023-2024 - 03/04/2023 04/02/2024 Filter Reset

Filtered View: 61886A - St Lawrence College - Watford Lake | 61887 - Adult Agency | 61888 - Agnes | 61889 - Acadia College - Newell | 61890 - 6175 | 61891 - Algonquin CAAP Agerville | 61892 - Algonquin CAAP Periville | 61893 - ACPD4 | 61894 - Canadian Hearing Services - Toronto | 61895 - Loyola College - Belleville | 61896 - Community Living USA | 61897 - Nova Vocational Services | 61898 - Career Saunders | 61899 - Intervention - Detroit - Annapolis | 61900 - Intervention - Detroit - Redford | 61901 - JHS Research | 61902 - March of Dimes | 61903 - Career Fair - Belleville | 61904 - Career Edge - Niagara | 61905 - Career Edge - Peterborough | 61906 - Career Edge - Toronto | 61907 - CD411 | 61908 - Performance Plus | 61909 - Postsecondary Military Resource Centre | 61910 - St. Lawrence College - Kingston | 61911 - Alliance to Work | 61912 - Agnes - 61913 - Kitchener | 61914 - Agnes - 61915 - 61916 - 61917 - 61918 - 61919 - 61920 - 61921 - 61922 - 61923 - 61924 - 61925 - 61926 - 61927 - 61928 - 61929 - 61930 - 61931 - 61932 - 61933 - 61934 - 61935 - 61936 - 61937 - 61938 - 61939 - 61940 - 61941 - 61942 - 61943 - 61944 - 61945 - 61946 - 61947 - 61948 - 61949 - 61950 - 61951 - 61952 - 61953 - 61954 - 61955 - 61956 - 61957 - 61958 - 61959 - 61960 - 61961 - 61962 - 61963 - 61964 - 61965 - 61966 - 61967 - 61968 - 61969 - 61970 - 61971 - 61972 - 61973 - 61974 - 61975 - 61976 - 61977 - 61978 - 61979 - 61980 - 61981 - 61982 - 61983 - 61984 - 61985 - 61986 - 61987 - 61988 - 61989 - 61990 - 61991 - 61992 - 61993 - 61994 - 61995 - 61996 - 61997 - 61998 - 61999 - 62000

	1 Month	3 Month	6 Month	12 Month	Maximum Total per Candidate
Stream A	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Stream B	\$30.00	\$90.00	\$180.00	\$360.00	\$360.00
Stream C	\$0.00	\$280.00	\$560.00	\$1120.00	\$1120.00

Funding Allocation

- Maximum Performance Based Funding: \$2,030.00
- Performance Based Funding Earned: \$640.00
- Remaining Performance Based Funding Available: \$1,390.00

Client Name	SMP Reference Number	Case Manager	Stream	SMP Effective Date	1 Month PBF	3 Month PBF	6 Month PBF	12 Month PBF	PBF Available
John Doe	751100	John Doe	Stream A	01-01-2023					\$0.00
Jane Smith	751100	John Doe	Stream B	01-01-2023	\$30.00	\$90.00	\$180.00	\$360.00	\$360.00
John Doe	751100	John Doe	Stream C	01-01-2023	\$0.00	\$280.00	\$560.00	\$1120.00	\$1120.00

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

Funding Allocation

Maximum Performance Based Funding

[Performance Based Funding Earned](#)

- 1 Month earned
- 3 Month earned
- 6 Month earned
- 12 Month earned

Remaining Performance Based Funding Available

Month	Maximum Total per Candidate
1.00	\$130.00
3.00	\$360.00
6.00	\$1,080.00

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...

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 Bogues	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	
	No		
	No		

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:

4. Enter the appropriate amount received.

5. Click "Submit."

A screenshot of a web application interface for updating PBF (Performance-Based Funding) payments. A modal form is open, containing three input fields for 'Month PBF Paid Q3', 'Month PBF Paid Q4', and 'Month PBF Variance', all of which contain '\$0'. At the bottom of the form, there are two buttons: 'Submit' (highlighted with an orange circle) and 'Cancel'. The background shows a table with columns for 'Outcome Completion Date', 'Milestone Achieved', and 'PBF EARNED'. The table has two rows: one with '28-03-2024' and 'Yes' (earning \$90.00) and another with 'No'.

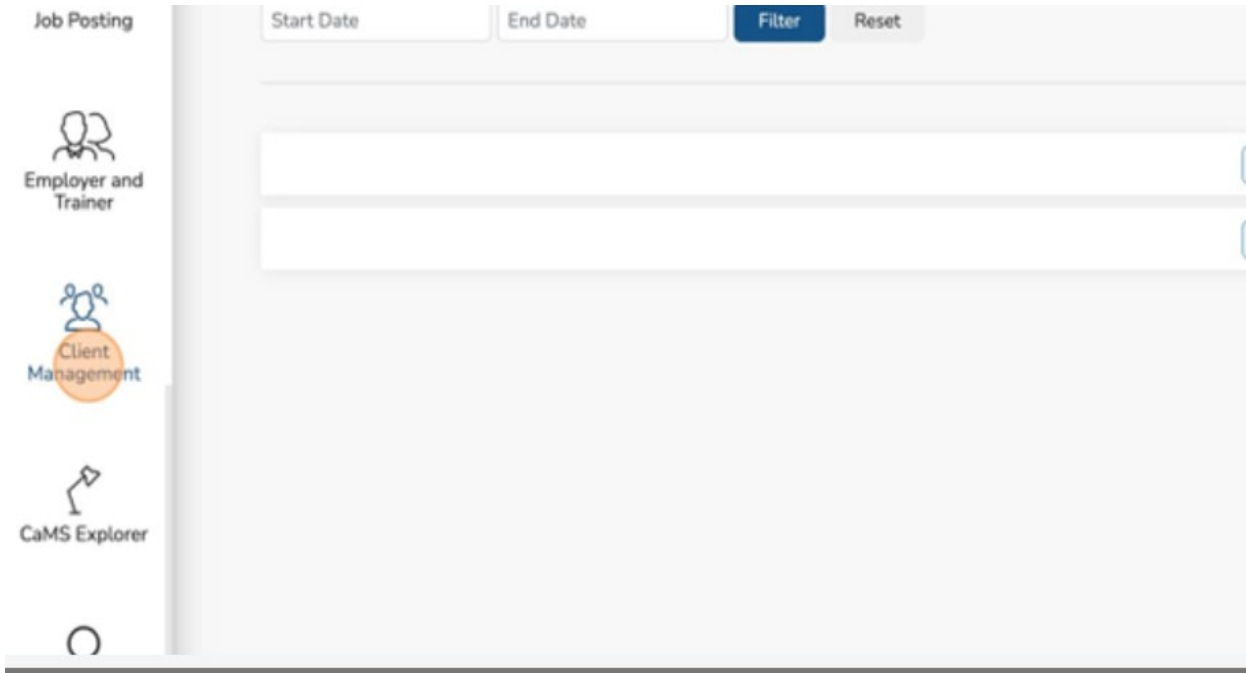
You have successfully updated the payment for PBF.

A screenshot of the EVIDENCE system dashboard. The top navigation bar includes the 'EVIDENCE' logo and the user name 'Administrator User'. Below the navigation bar, there is a table with columns for 'Stream #', 'PBF Milestone Number', 'Client Manager', 'Stream', 'PBF Success Date', and 'PBF Amount'. The table contains three rows of data. To the right of the table, there are two summary cards: 'Performance-Based Funding Earned' and 'Remaining Performance-Based Funding Available'. Below the table, there is a 'PBF Success Date' filter and a 'PBF Amount' filter. The 'PBF Amount' filter is highlighted with an orange circle. At the bottom of the dashboard, there is a 'Page 2 of 2' indicator.

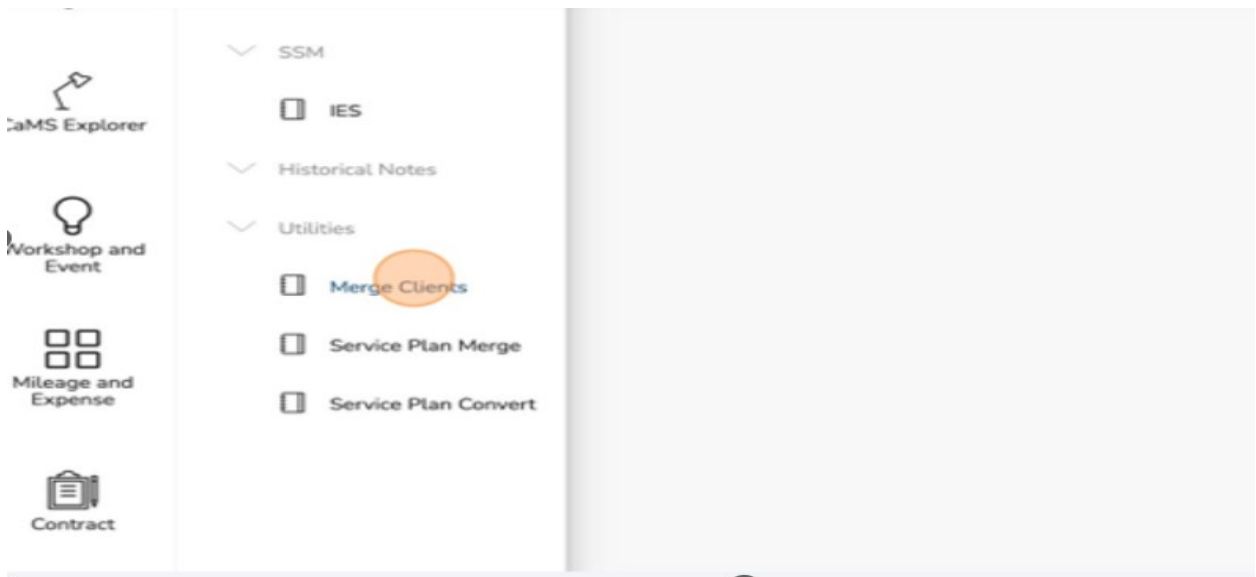
(24) Admin Tools - Merging Client Profiles

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

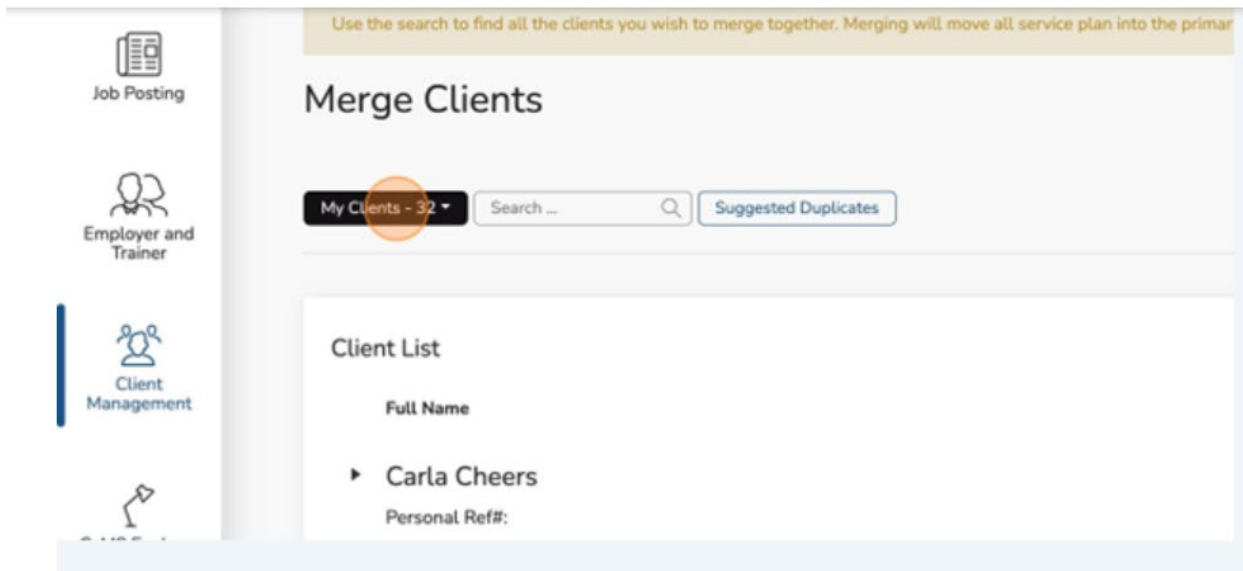
1. Click “Client Management.”



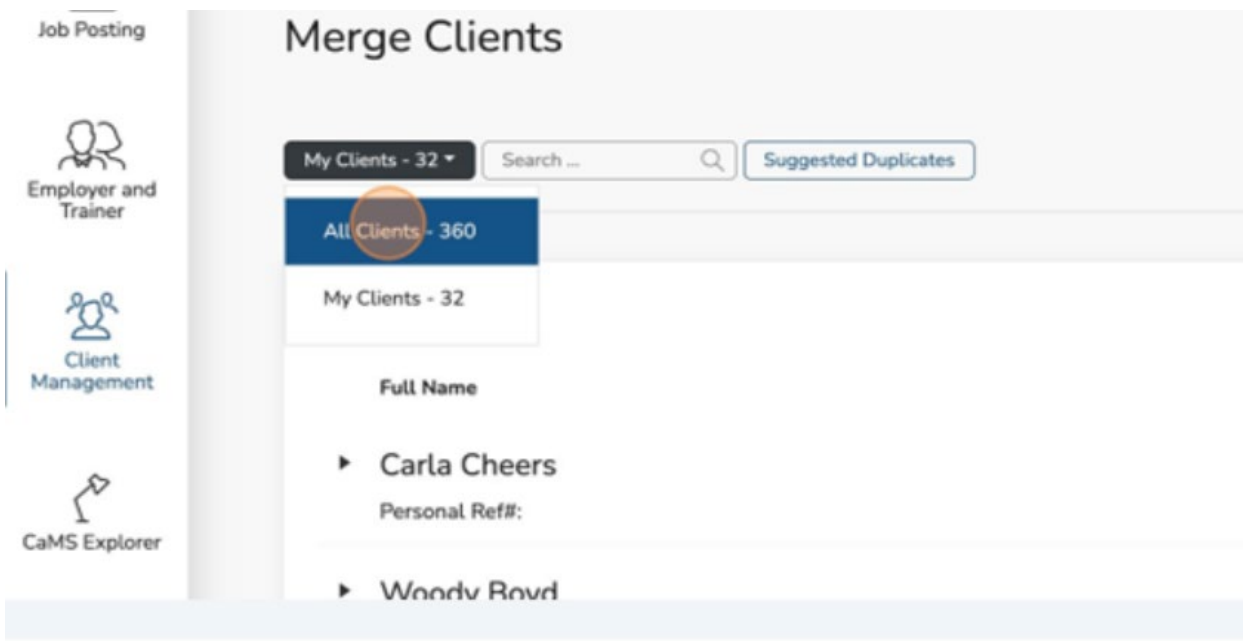
2. Click “Merge Clients.”



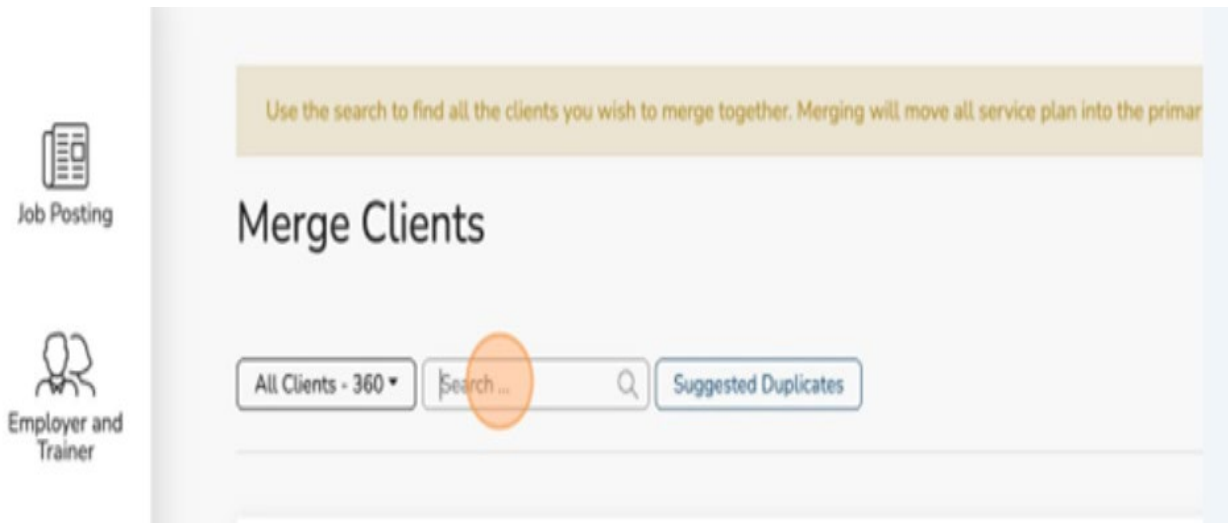
3. Click "My Clients."



4. Click "All Client."



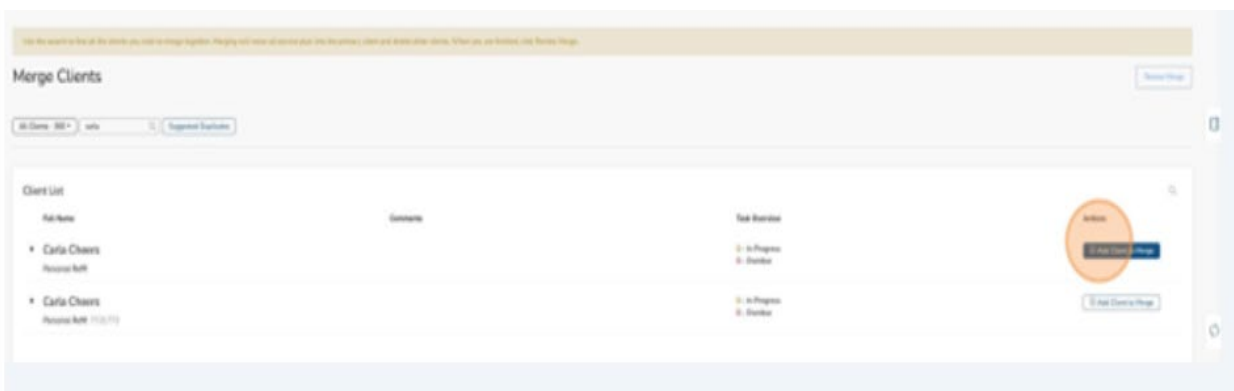
5. Click the “Search” field.



6. Enter the client Name.

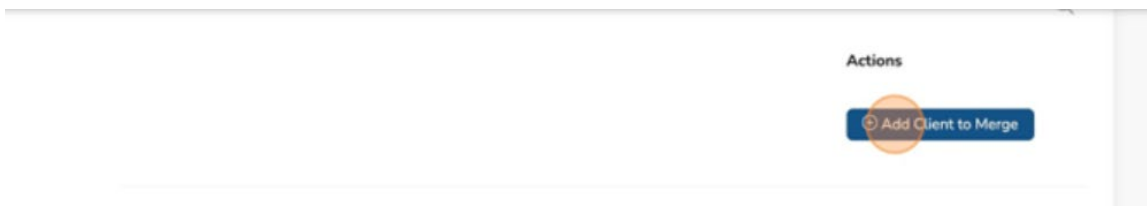
7. Locate the client profile you want to add to the merge.

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.”

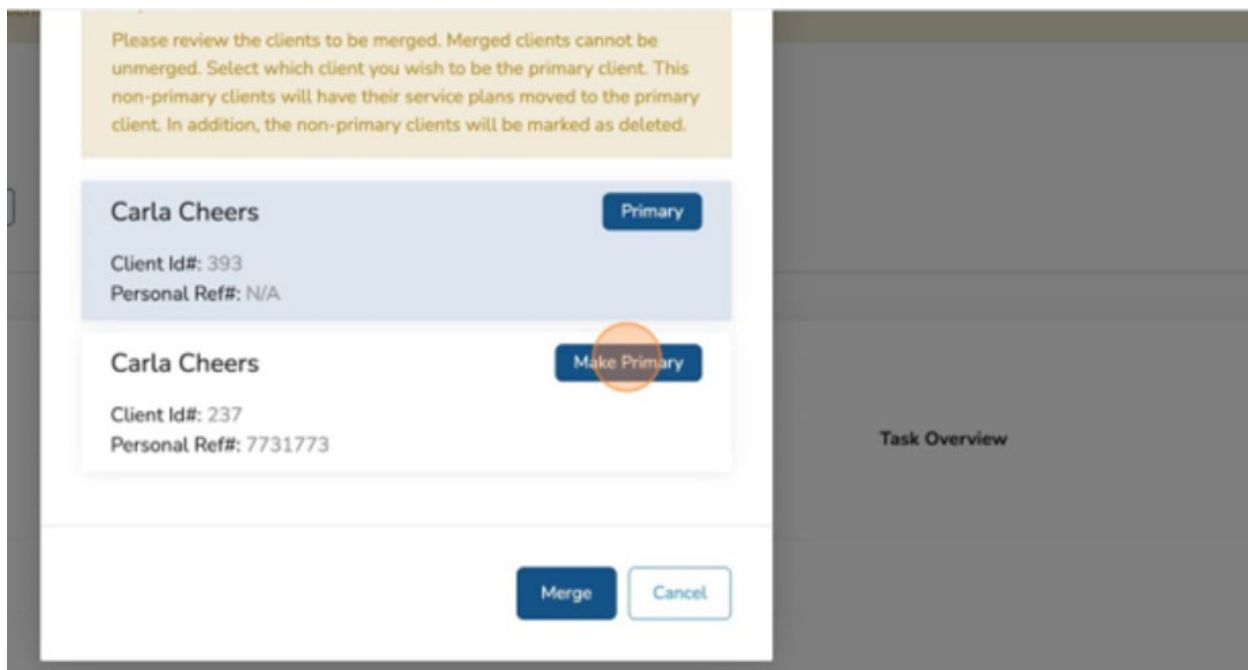


11. Click "Review Merge."

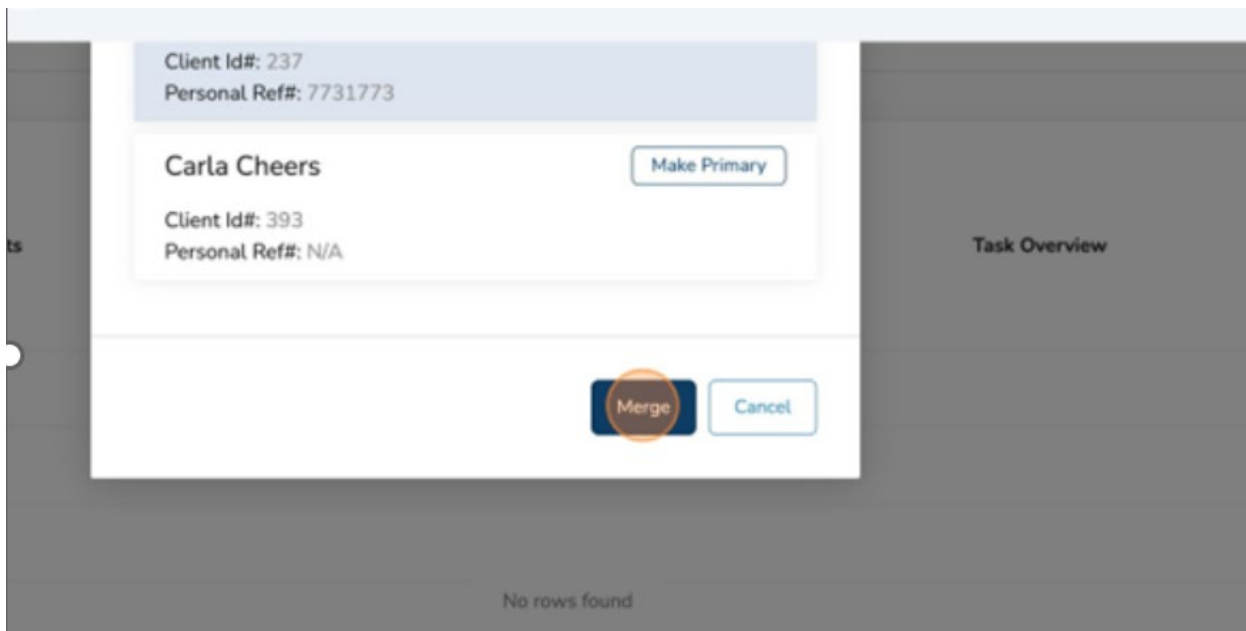


- Alert! Ensure you identify the appropriate profile as the "Primary" profile. Choosing the "Primary" profile will set this client as the main profile moving forward. All other profiles involved in this merge will be consolidated into the primary profile.

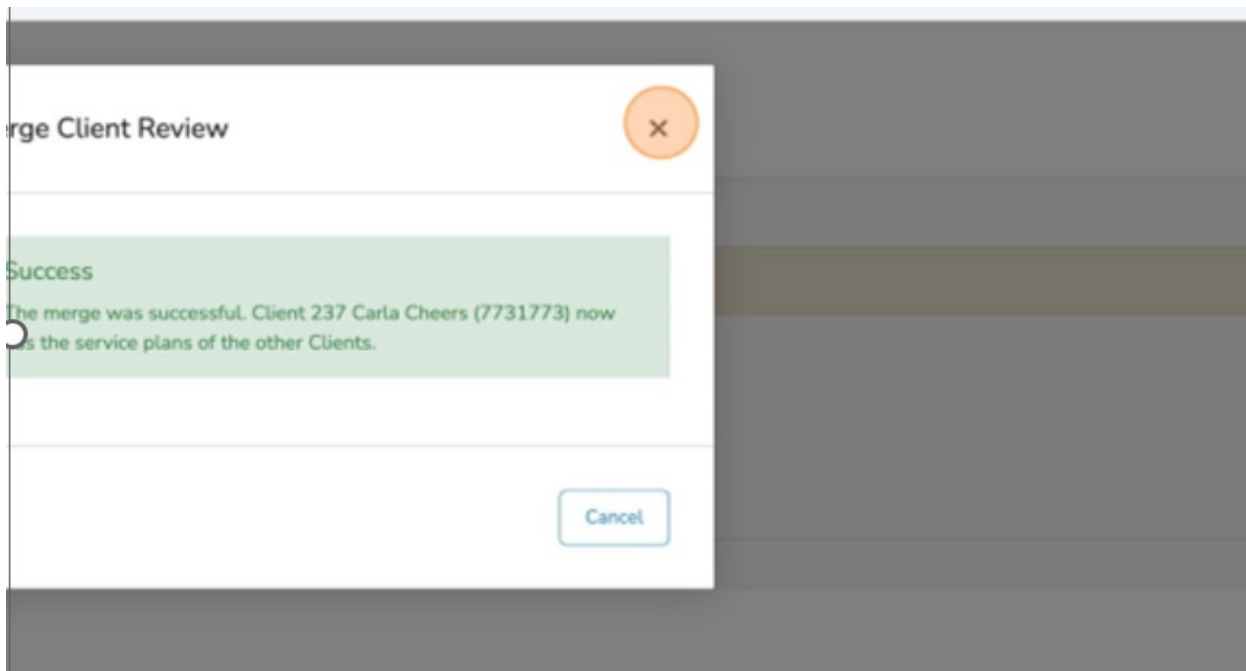
12. Click "Make Primary."



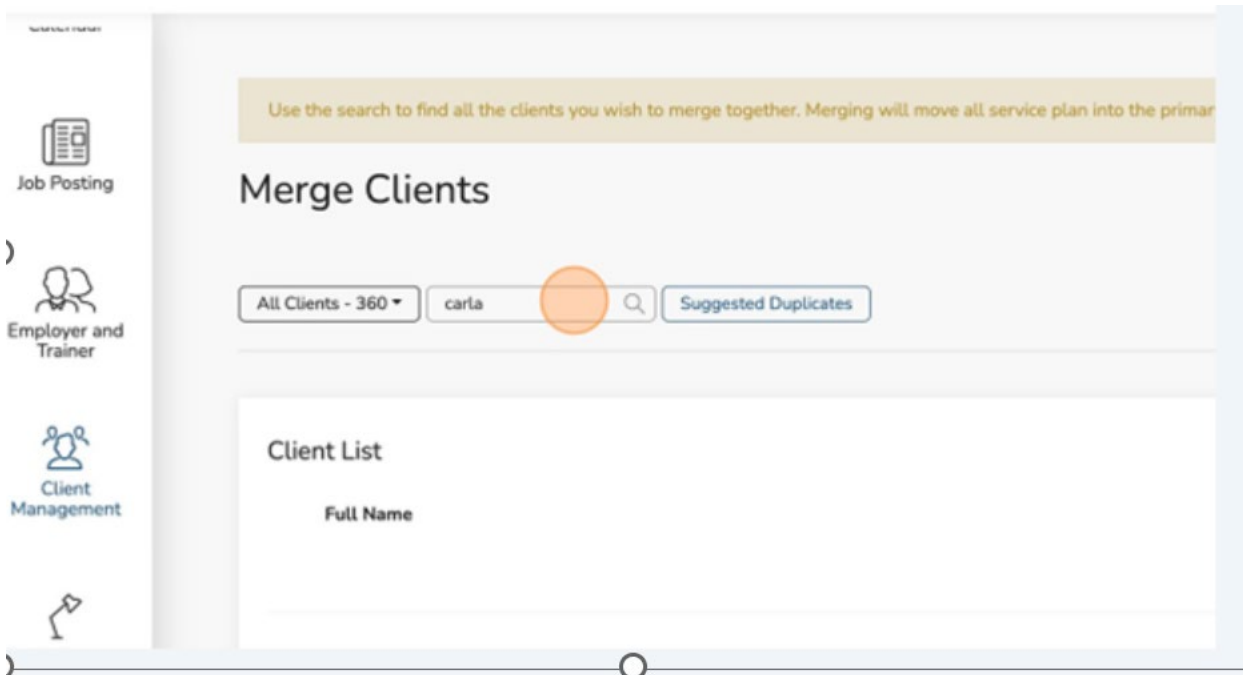
13. Click "Merge."



14. Click "X" to close.

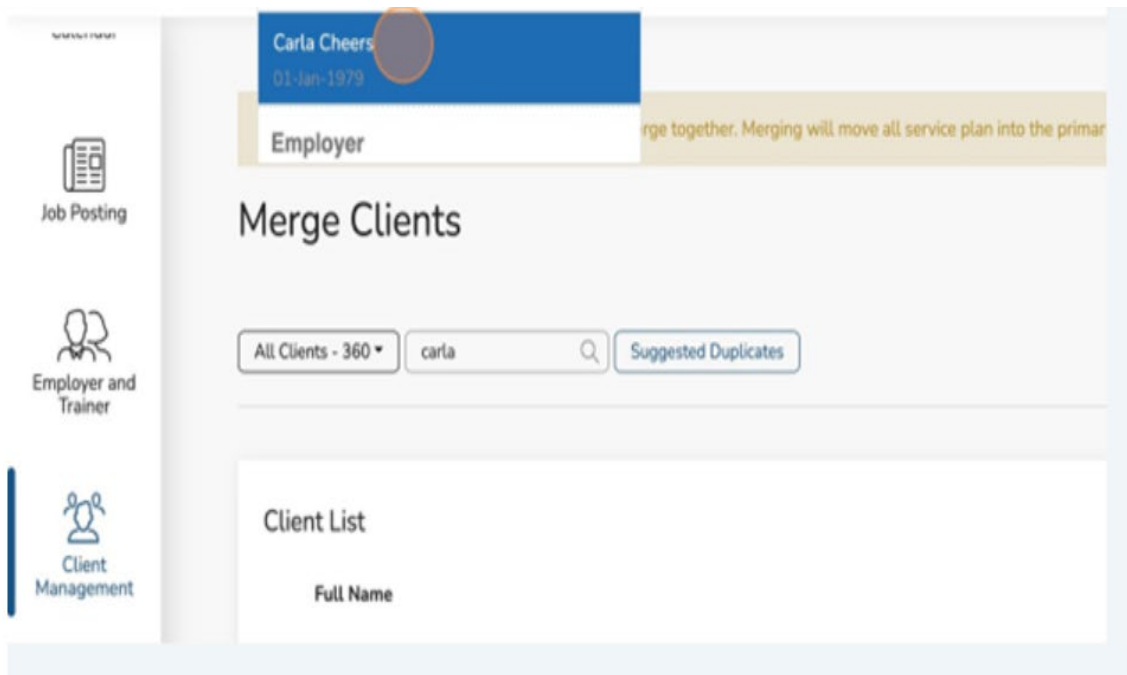


15. Click the “Search” field.

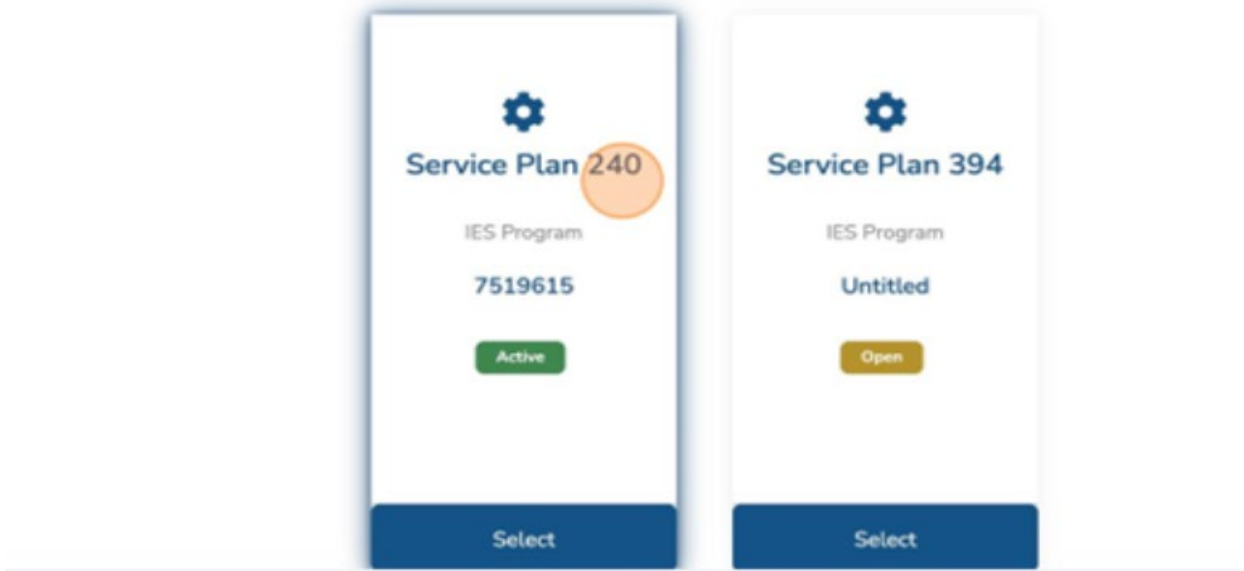


16. Type the name of the client profile you just merged.

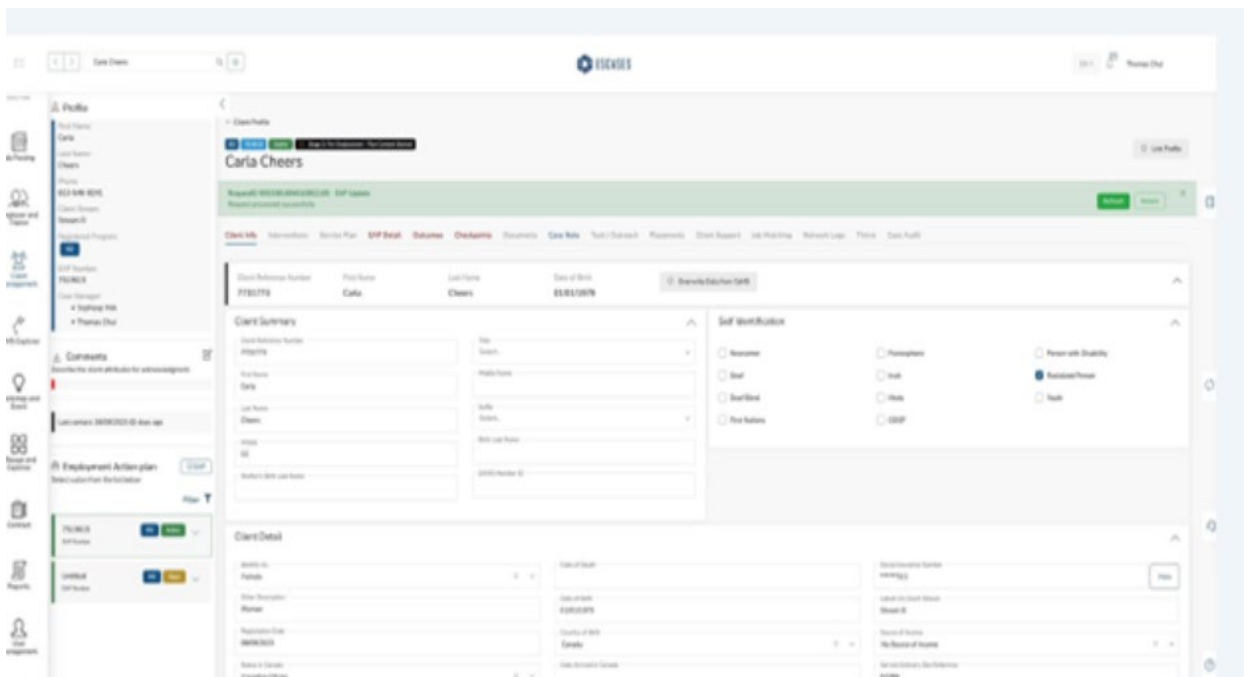
17. Select the “Client profile.”



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



You have successfully merged profiles.

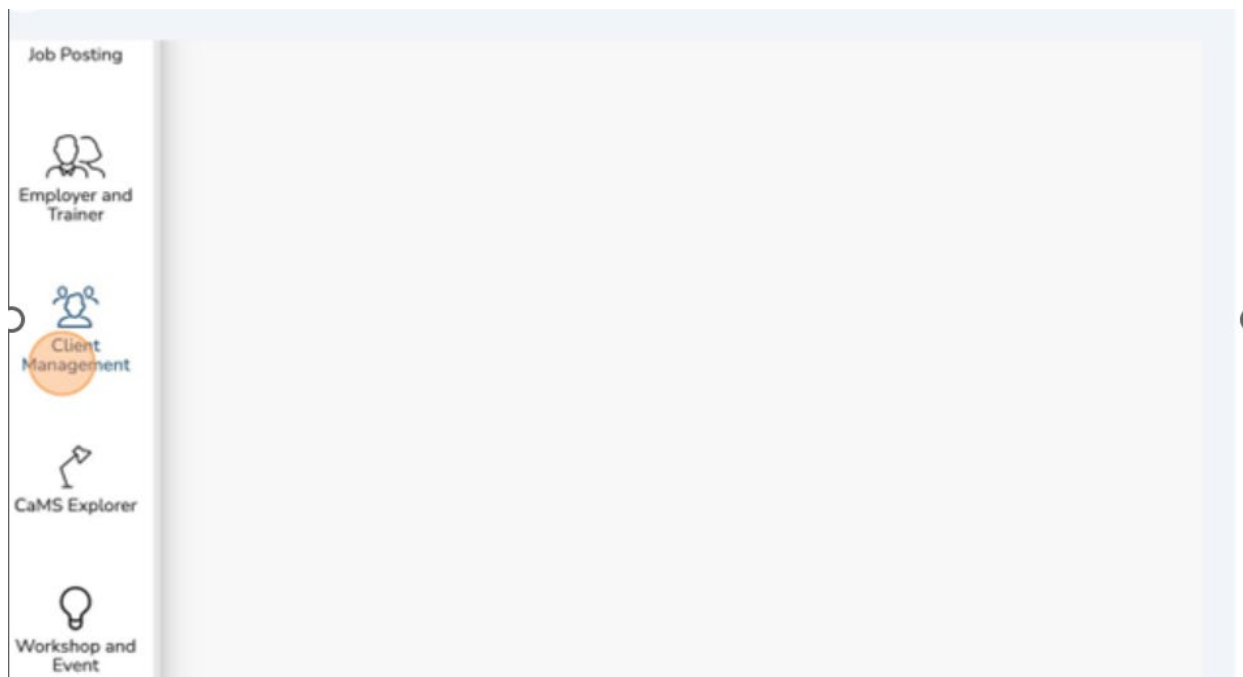


After the Profiles are merged the EAP must be merged. To merge the EAP, complete the steps under merging service plans in the next section.

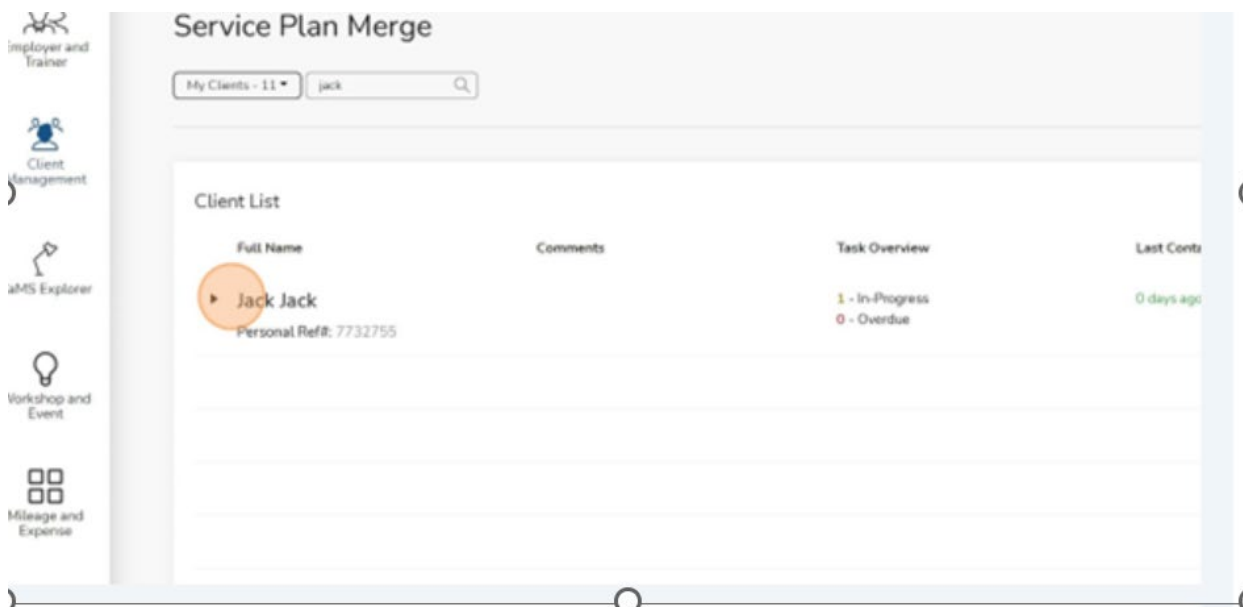
(25) Admin Tools - Merging Service Plans

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

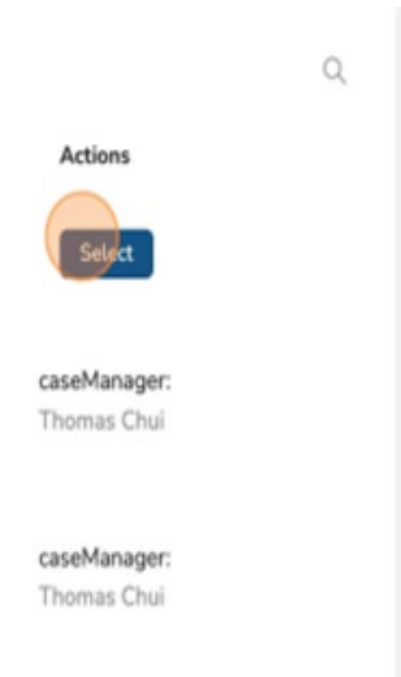
1. Click "Client Management."



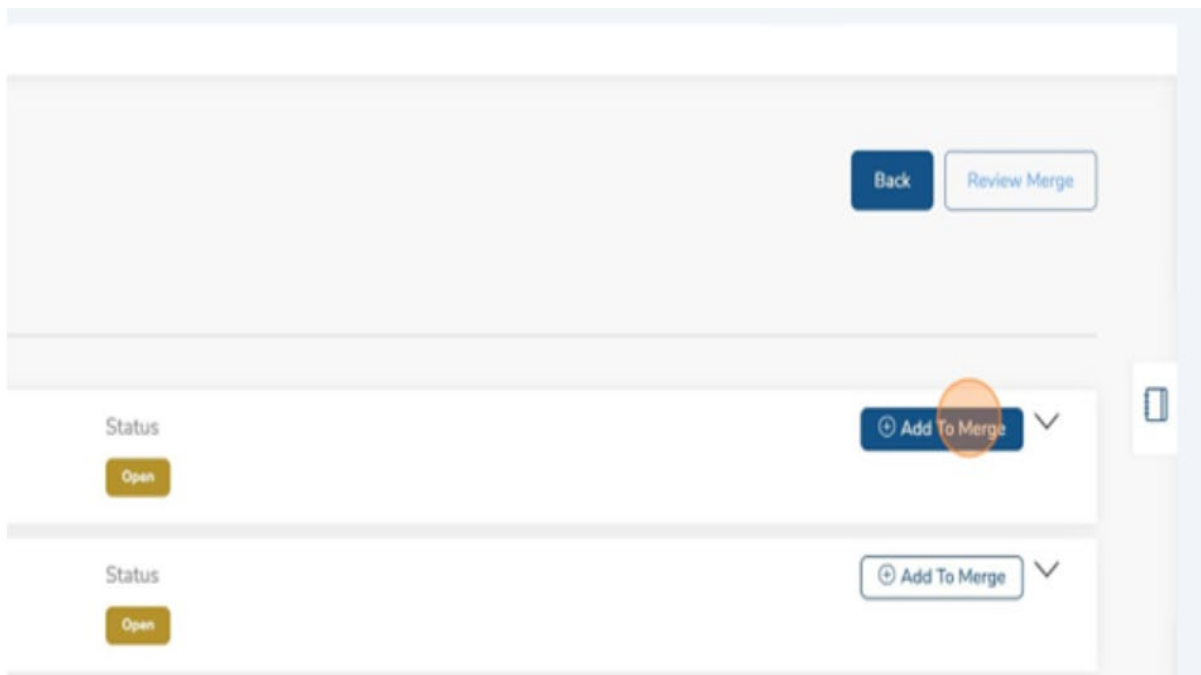
2. Enter the client that has the service plan to be merged.



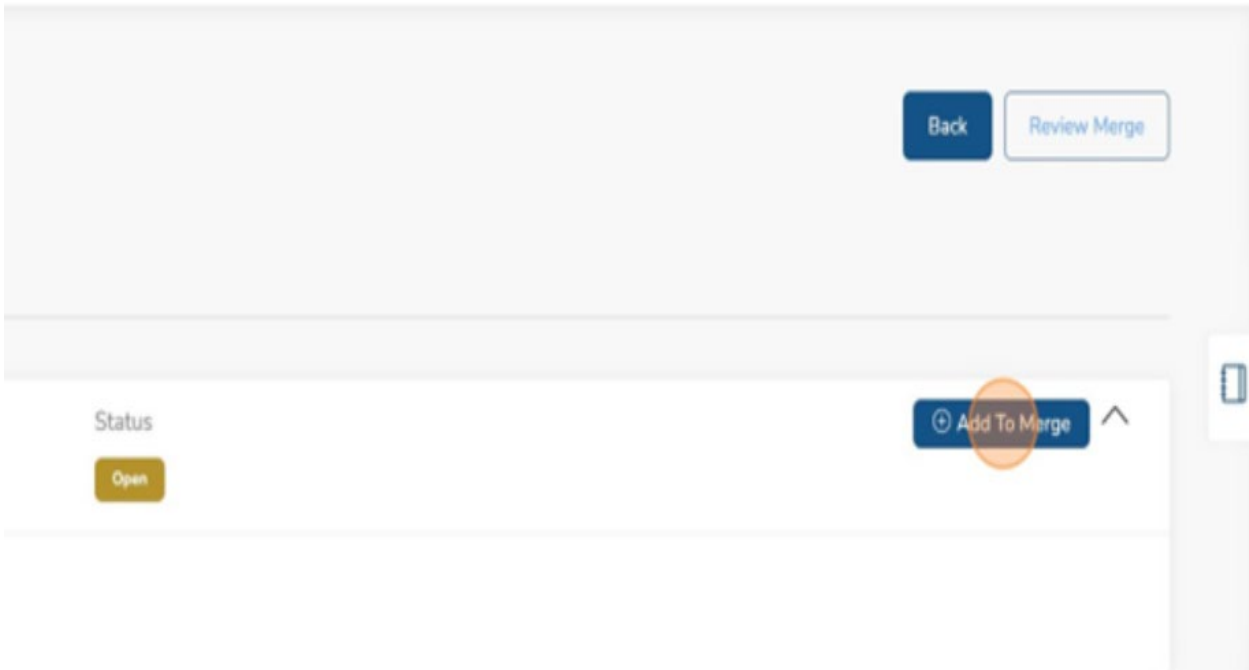
3. Click "Select."



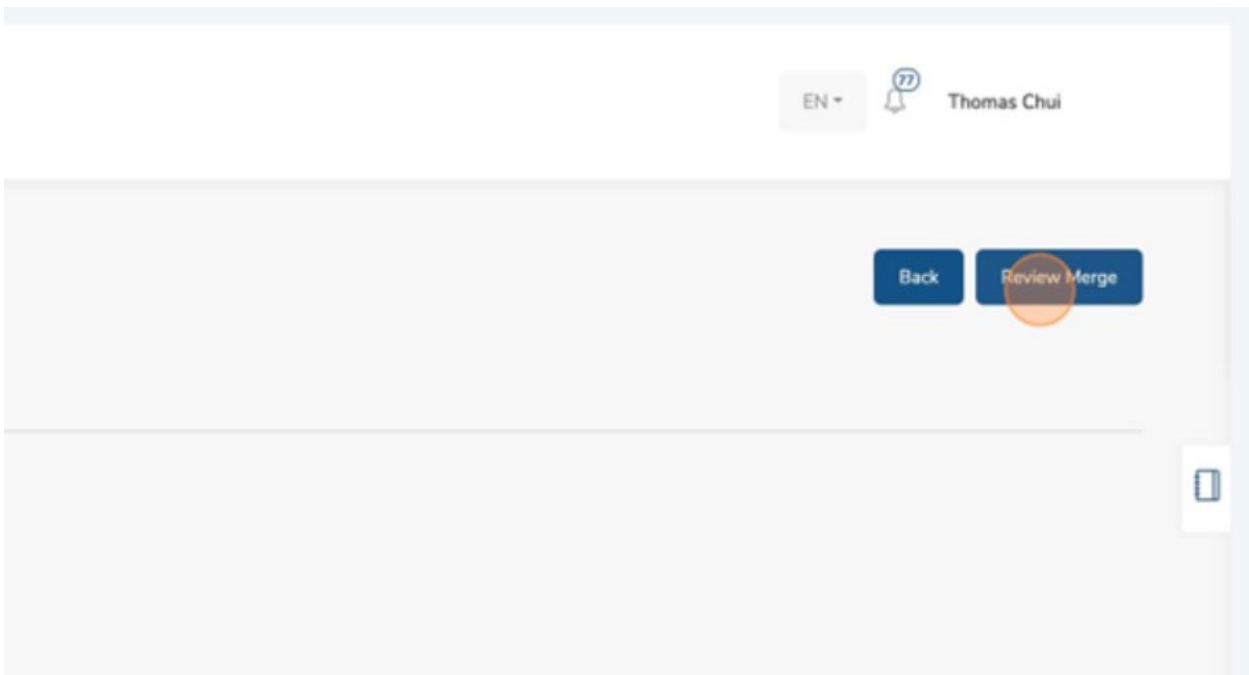
4. Click "Add to Merge" for the first service plan you want to merge.



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

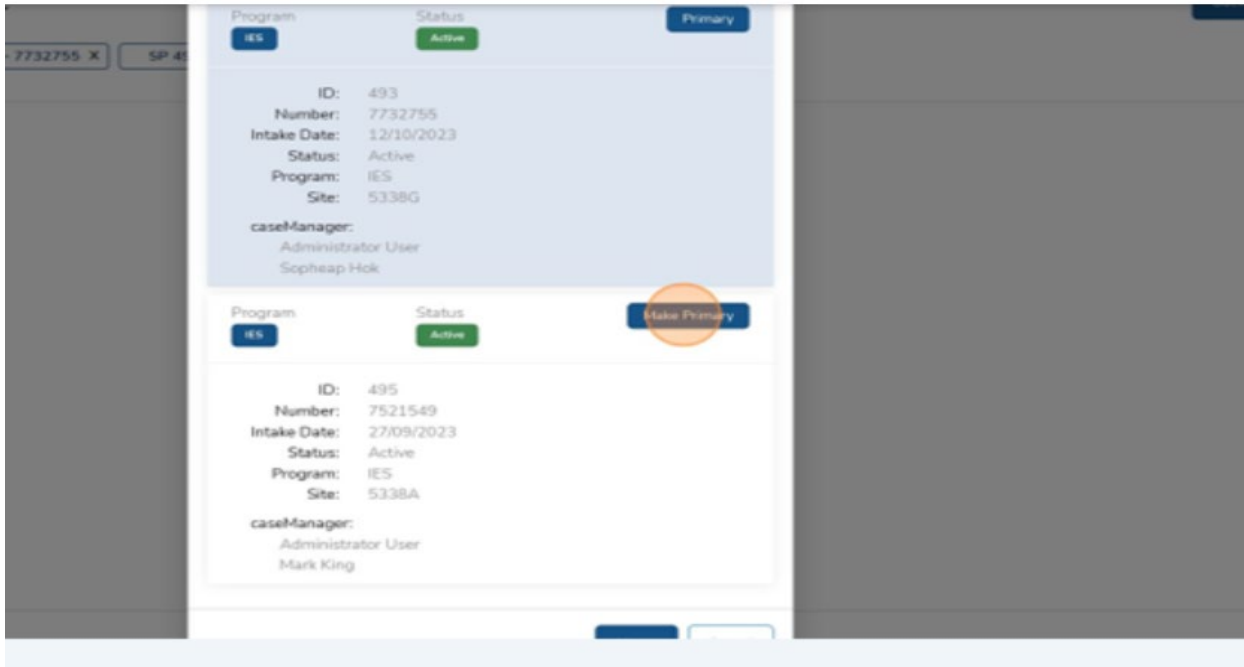


6. Click “Review Merge.”

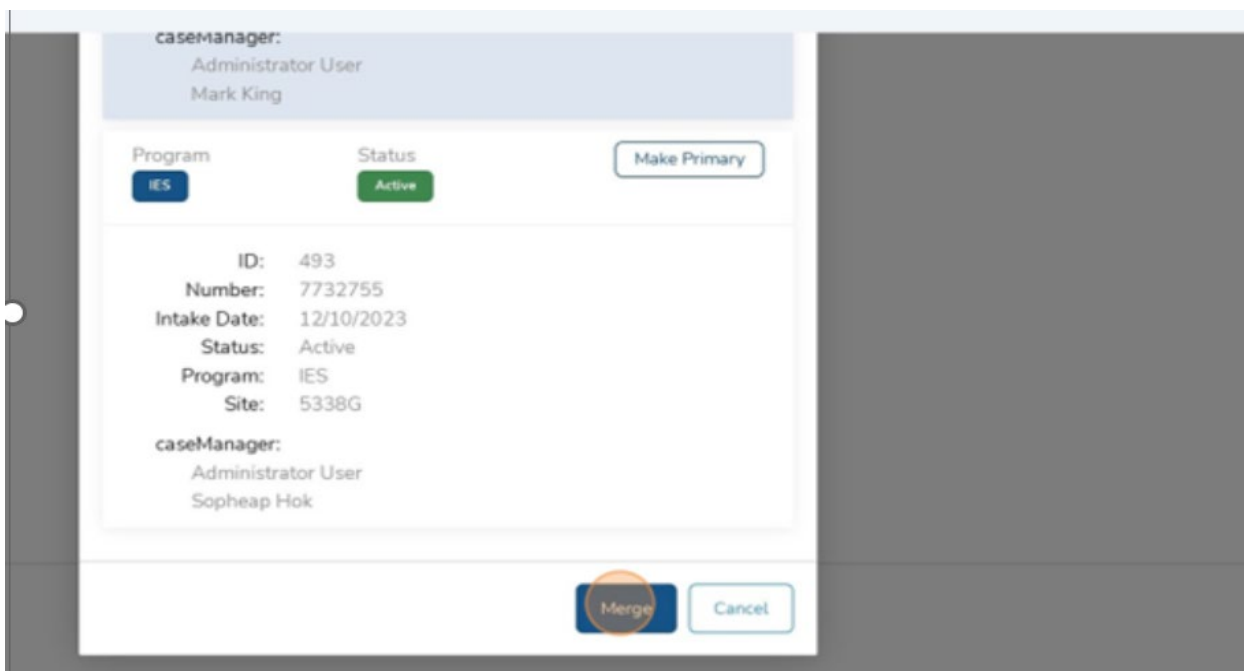


- Alert! Choosing the "Primary" service plan will set this as the Primary Service Plan. All other service plans involved in this merge will be consolidated into the primary service plan.

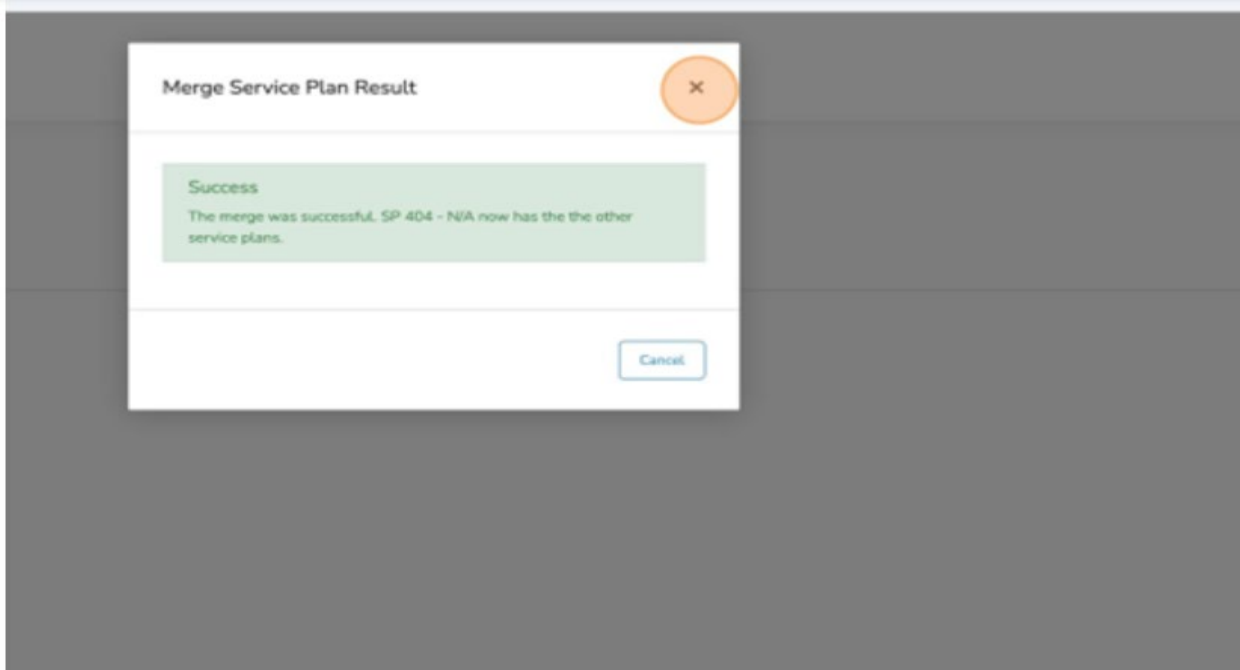
7. Click "Make Primary."



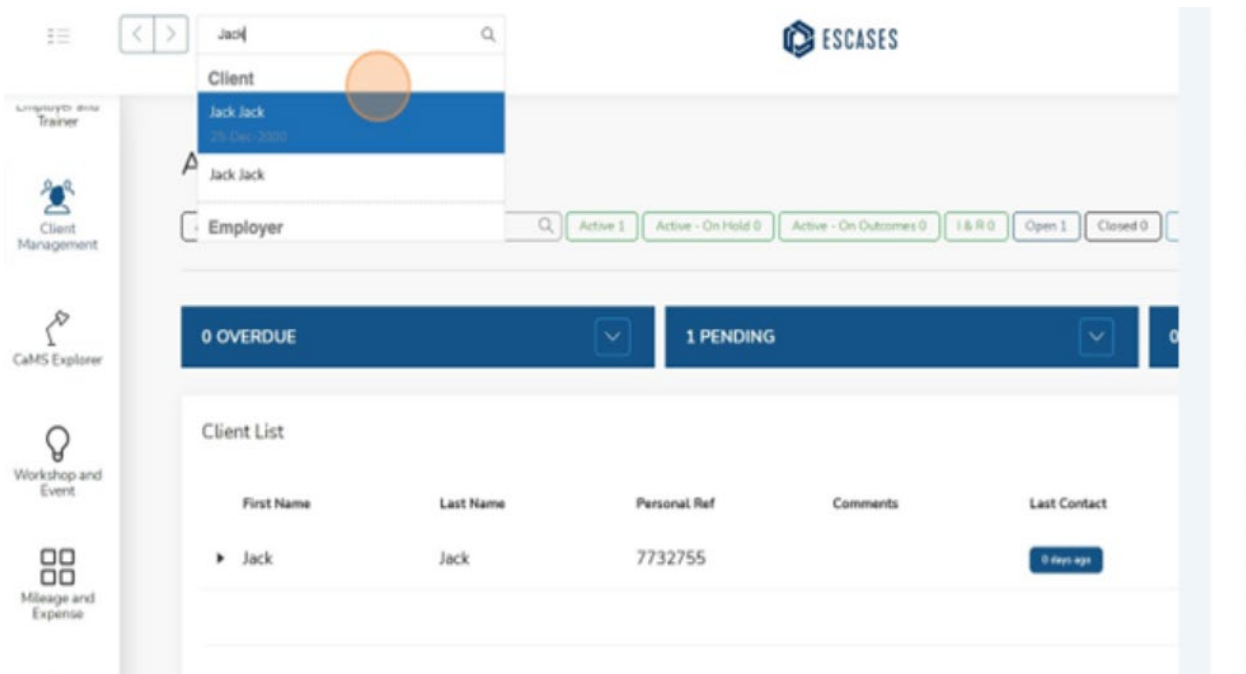
8. Click "Merge."



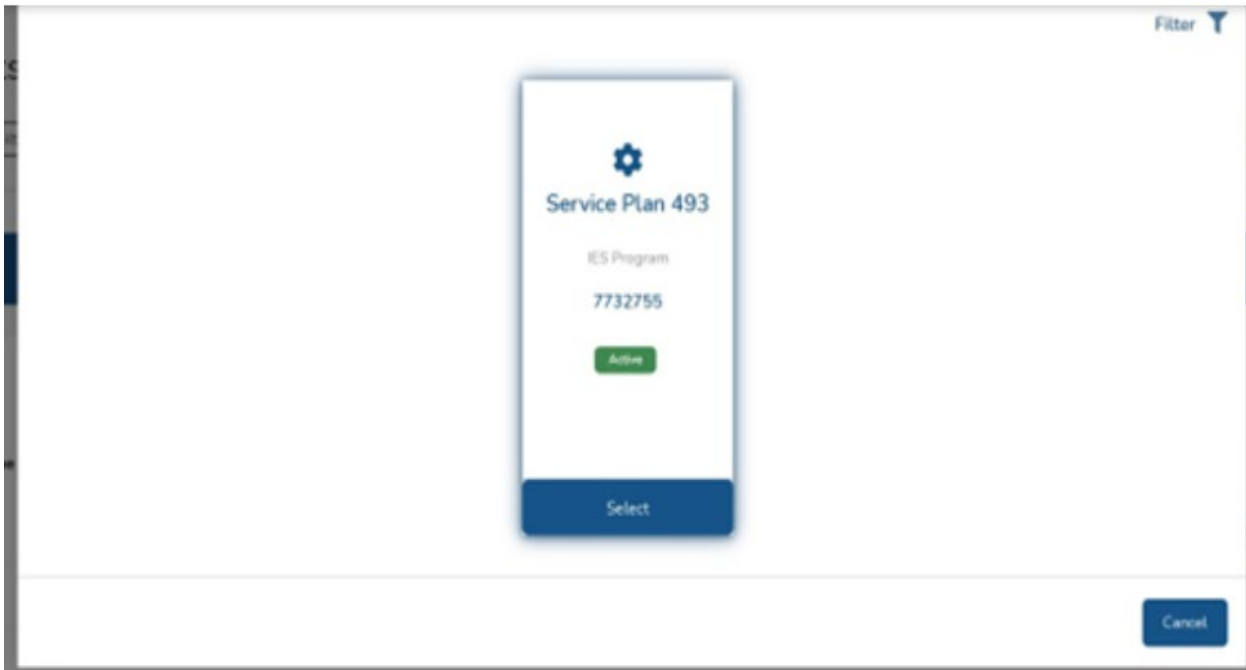
9. Click on the "X" to close.



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



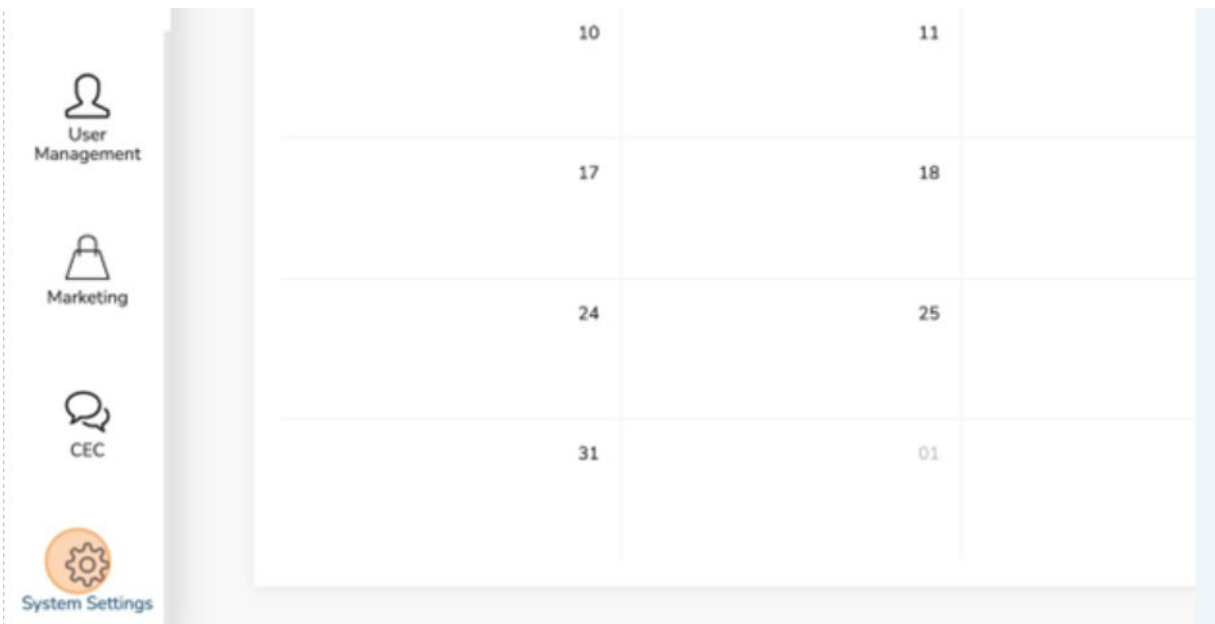
You have successfully merged service plans.



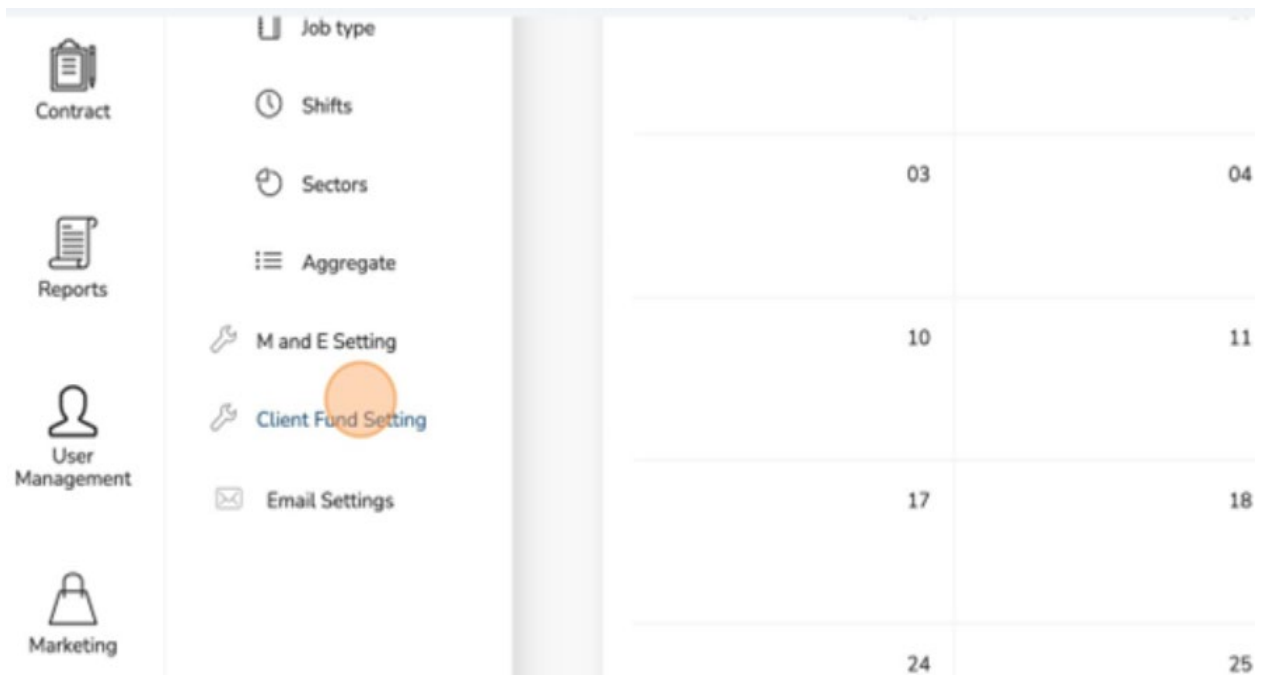
(26) Admin Tools - Client Fund Settings

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

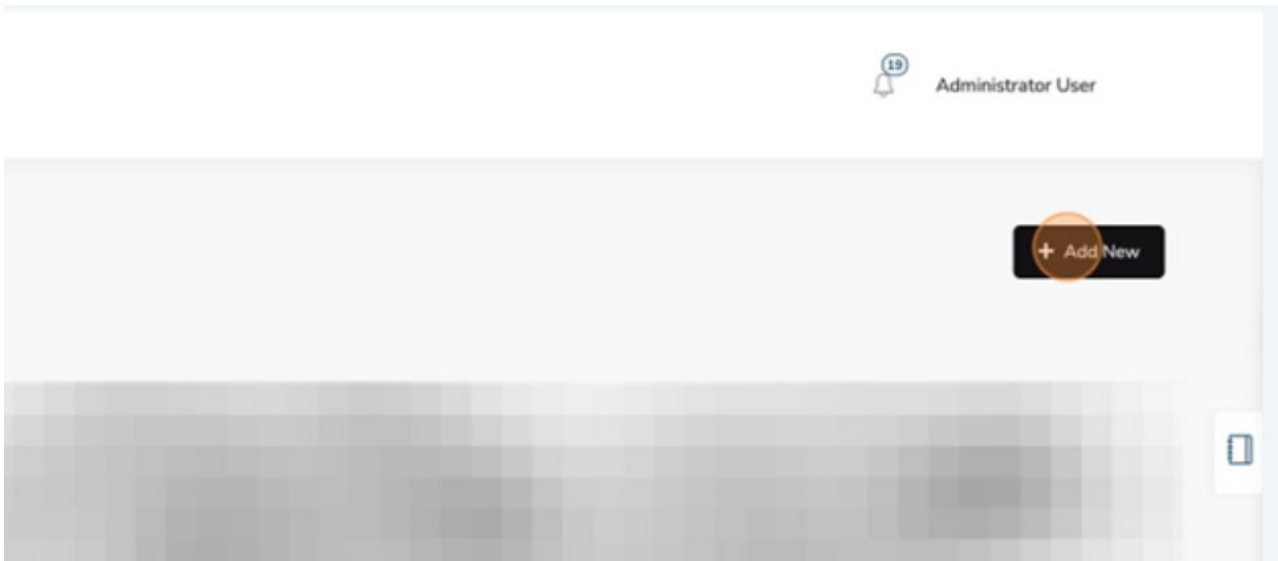
1. Click "System Settings."



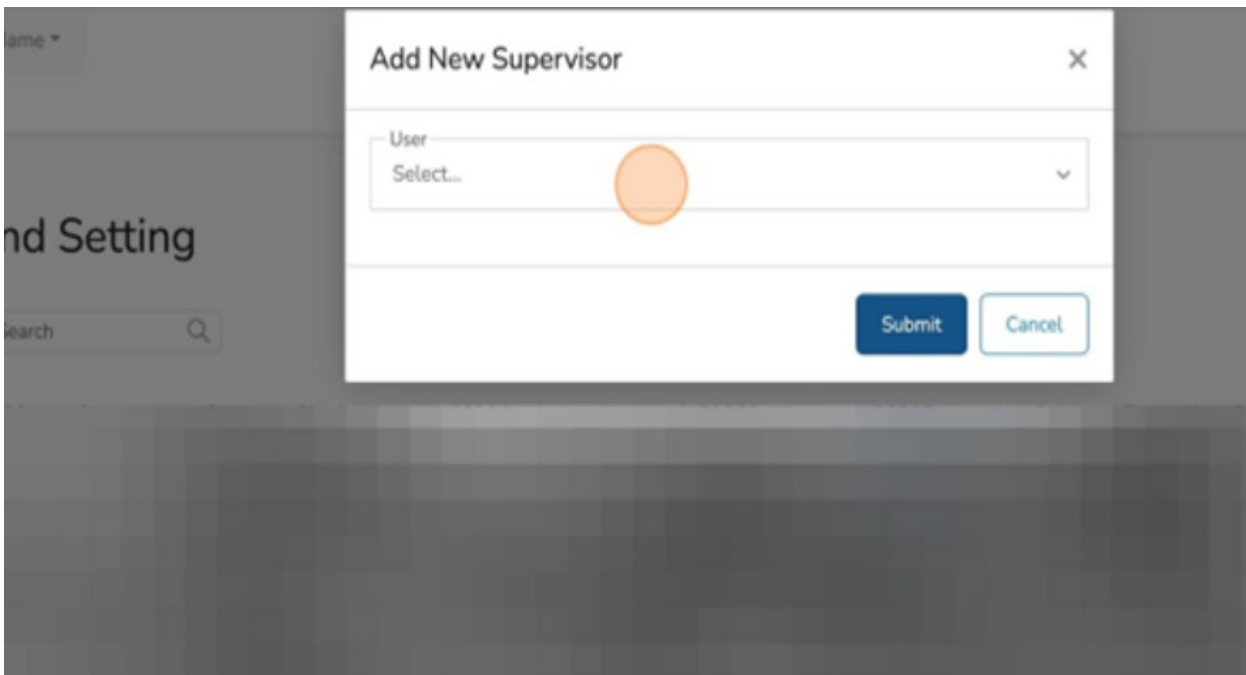
2. Click "Client Fund Settings."



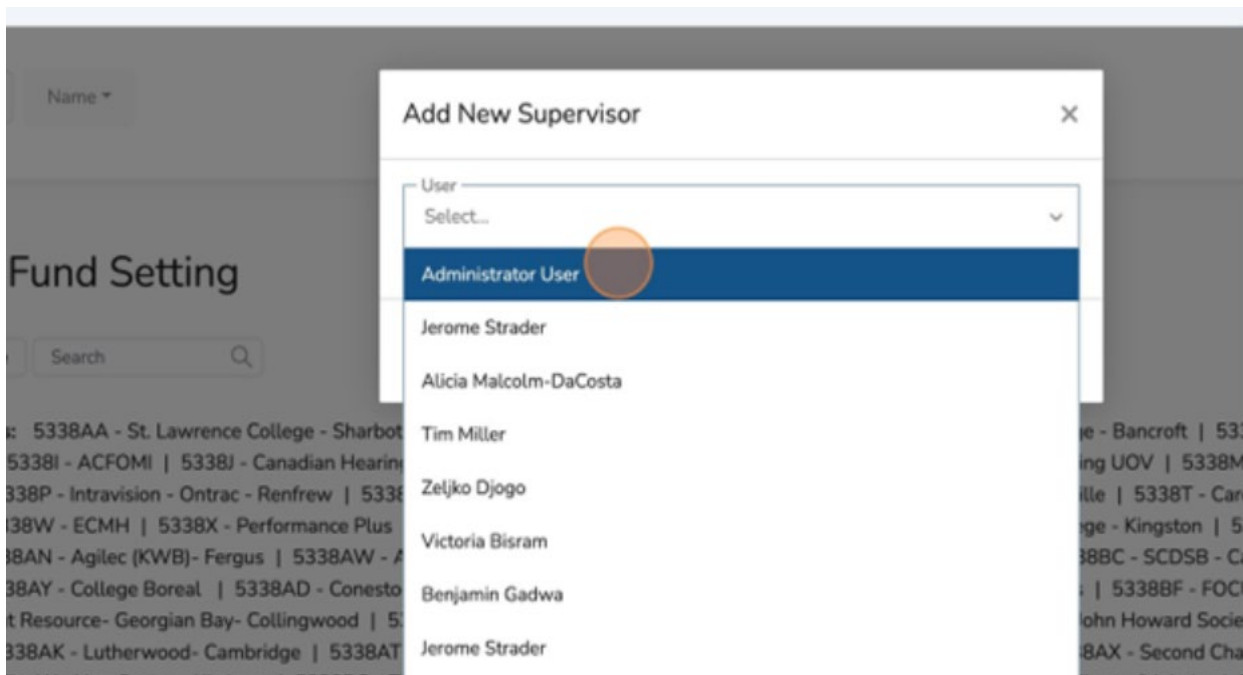
3. Click “Add new.”



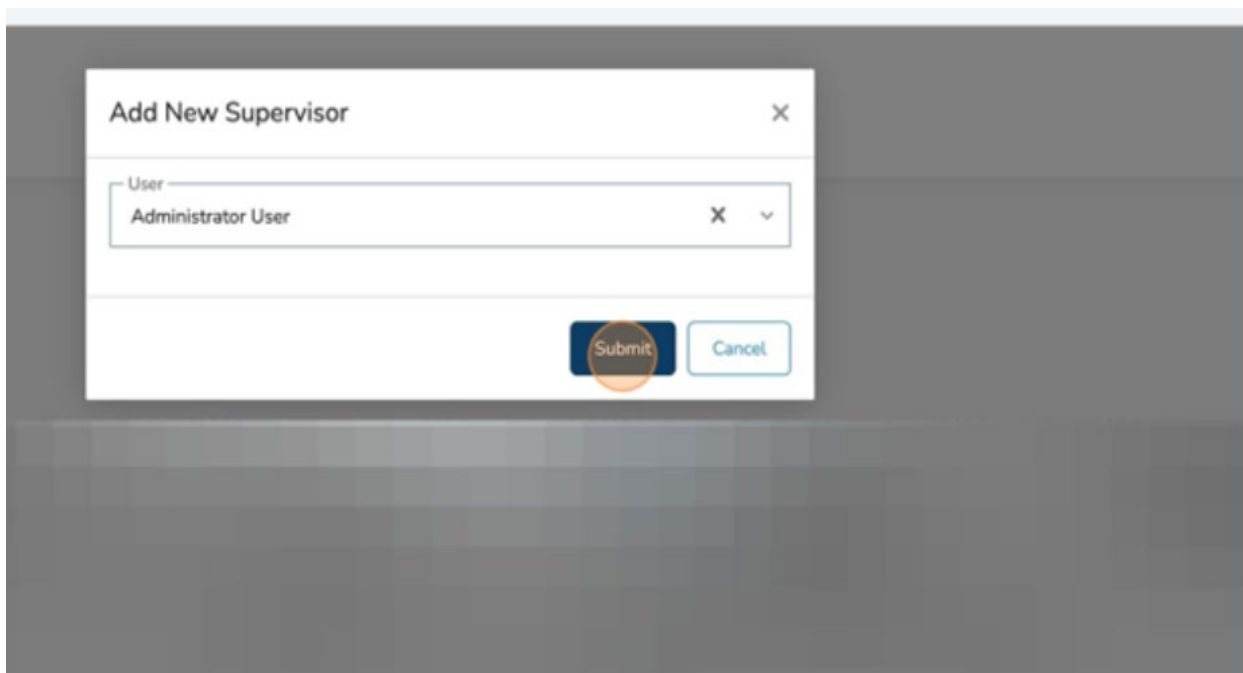
4. Click the “User” field.



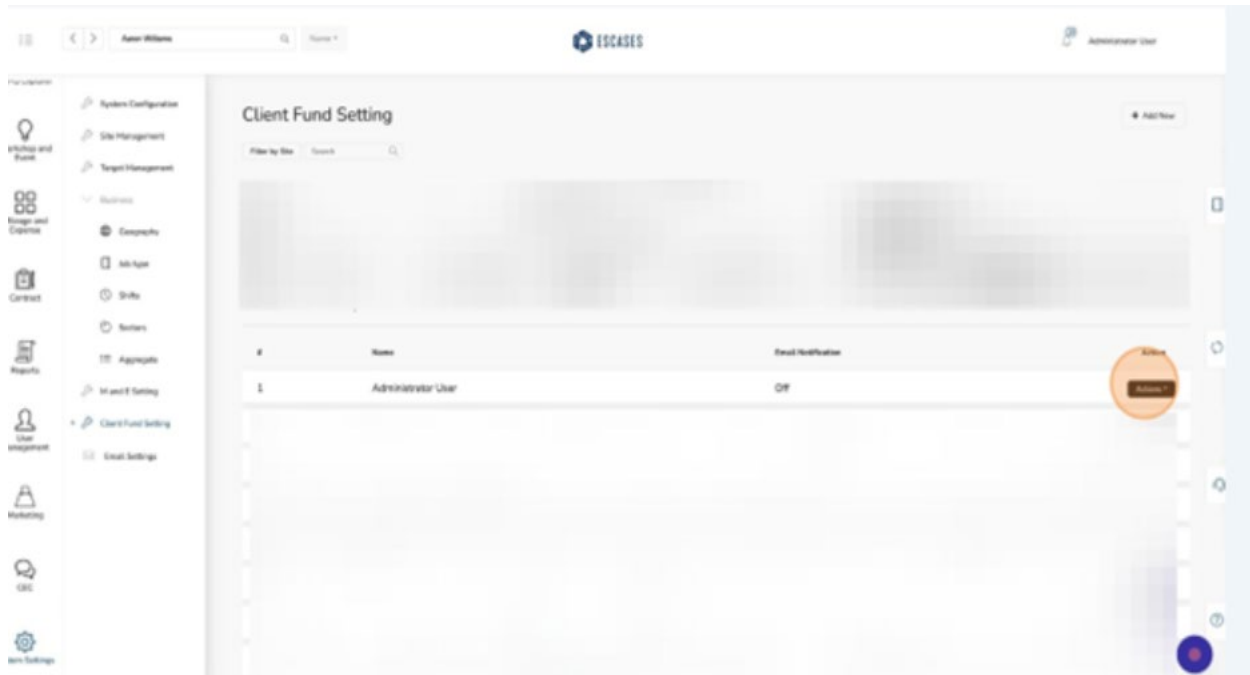
1. Select the appropriate user to add.



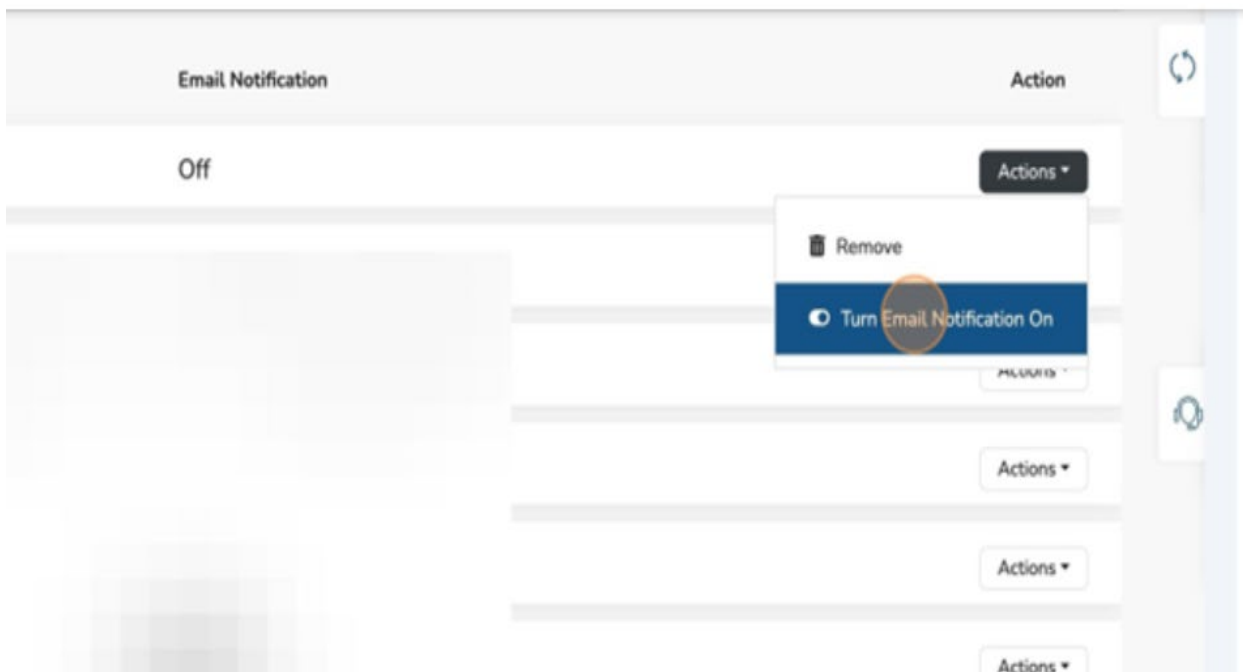
2. Click "Submit."



3. Click "Actions."



4. Click "Turn Email Notification On."



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

