



# **EOIS Service Provider Connect Service Provider User Guide**

## **Chapter 2: Agreements Management**



### Document History

Version #	Date	Description
1.0	June 15, 2015	Initial version for June 2015 release

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## 2 Agreement Management

### 2.1 Introduction

EOIS SP Connect provides service provider users with online access to view the agreements details. Each agreement is distinct to a program and region and contains one or more delivery sites. The target and allocation details are aligned to each site.

The June 2015 release of SP Connect will manage agreements for the following programs:

- Youth Employment Fund (YEF)
- Canada Ontario Job Grant (COJG) Service Providers
- Employment Service (ES),
- Literacy and Basic Skills (LBS)
  - Service Delivery (SD)
  - Service Organizations (SO)
  - LBS e-Channel
- Local Boards (LB)
- Ontario Employment Assistance Services (OEAS)
- Ontario Self Employment Benefit (OSEB)
- Summer Jobs Services (SJS)
- Targeted Initiative for Older Workers (TIOW)
- Youth Employment Funds (YEF)

When an agreement has been generated by the Ministry and sent to the service provider, the agreement details will appear in SP Connect. Service provider users can access the agreement page and view the details of the agreement and any amending agreement that has been created.

### 2.2 Roles and Responsibilities

The following table lists the actions that a service provider user role can perform.

Functionality	SPSA Role	SPA Role
List Agreements	X	X
View Agreement	X	X
View Agreement PDF	X	X
View Amending Agreement	X	X

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View Payment Schedule	X	X
Generate Payment Report	X	X
View Targets/Allocations	X	X
View Adjustment (Target/Allocation)	X	X
Propose Target and Allocation Adjustment	X	X
Submit Target and Allocation Adjustment	X	
Update Allocation Adjustment	X	
Close Target and Allocation Adjustment	X	

### 2.3 View Service Provider Profile

The **Service Provider** section contains the service provider profile details. This page provides key service provider information and is the launch page to access active agreement details.

For more information on the **Service Provider** section, please review Chapter 1: Introduction and Navigation user guide.

#### **System Steps**

##### **➤ Step 1: *Dashboard***

Click the **Service Provider** section. This section is divided into five panels:

- **Service Provider Profile** - Contains the SP profile information
- **Address** - Contains business and mailing address
- **Corporate Details** - Contains COI Information and corporate contact
- **Service Delivery Sites** - Contains a list of all the service delivery sites and their locations
- **List of Active Agreements** - Contains a list of all active PO numbers for the service provider

These panels can be collapsed or expanded by clicking on the arrow in the right hand corner.

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Dashboard Service Provider Agreements Financials Monitoring Calendar Feedback

Service Provider > Dashboard > Search Service Providers > Service Provider 2007

**Service Provider Profile**

Service Provider ID	2007	Legal Name		Business Name	
SPIS Supplier Number	35502	Status	Active	Preferred Language	English

**Address**

Business		Mailing	
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**Corporate Details**

COE Expiry Date(dd/mm/yyyy)	01/26/2016	COE Comments	
Corporate Contact		Title	Senior Vice President, Employment & Community
Telephone 2		Email	
Other Emails			

**Service Delivery Sites**

**List Active Agreements**

## 2.4 Agreements

Each agreement is associated to a program and region. A service provider who has activity for a specific program with more than one region will have separate agreements with each region.

### 2.4.1 Search for Agreements

The List Agreement page provides a list view of all agreements the service provider has with the Ministry for the program managed in SP Connect. The list can be filtered as needed to refine the results.

The **Quick Search** can be used if the user knows the PO / Agreement number. In most cases, the *List Agreements* page may be a more efficient method.

#### System Steps

##### ➡ **Step 1a:** *Dashboard – Quick Search*

Click the **Agreements** section. To use the **Quick Search**, enter the **PO Number** and click Search.

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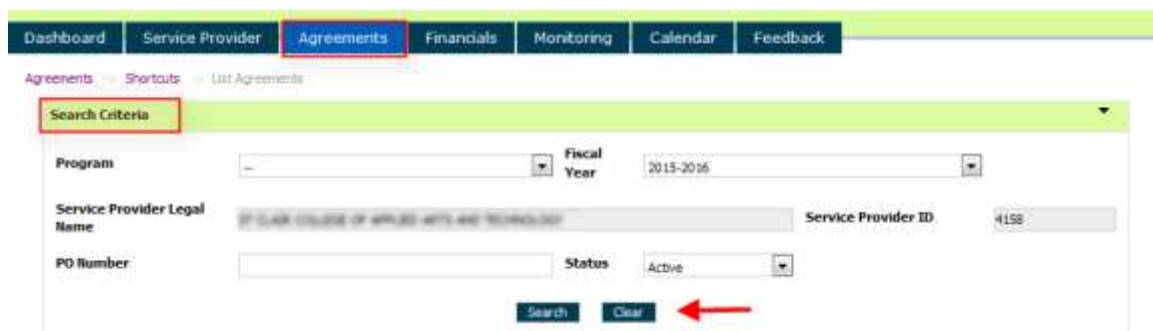


## ➤ Step 1b: Dashboard – List Agreements

Click the **Agreements** section and click the List Agreements link, located under the **Agreement Shortcuts** panel.

## ➤ Step 2: List Agreements

The **Search Criteria** panel shows a number of fields to assist with refining your search. Enter the search criteria and click Search.



## ➤ Step 3: List Agreements

The **List Agreement** panel displays all agreements for the service provider. To view an agreement, click the PO Number link (this is the same as agreement number) to view the associated agreement. The status options are explained in the next section.

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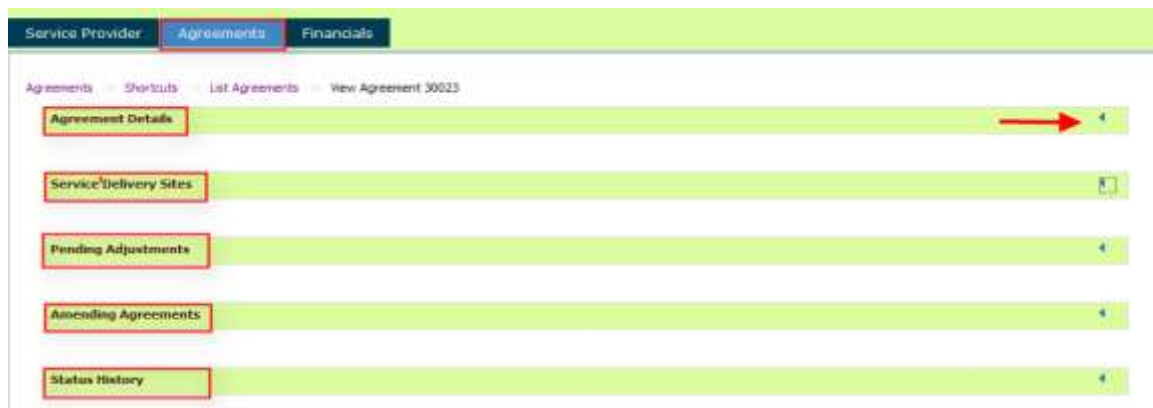


PO Number	Program	SP Ref#	Service Provider	Status	Fiscal Year
Number of Items: 4 of 4 records					
24180	Literacy and Basic Skills - Service Delivery	4158	ST CLARK COLLEGE OF APPLIED ARTS AND TECHNOLOGY	Active	2015-2016
24080	Employment Service	4158	ST CLARK COLLEGE OF APPLIED ARTS AND TECHNOLOGY	Active	2015-2016
24021	Summer Jobs Service	4158	ST CLARK COLLEGE OF APPLIED ARTS AND TECHNOLOGY	Active	2015-2016
23985	Ontario Self Employment Benefit	4158	ST CLARK COLLEGE OF APPLIED ARTS AND TECHNOLOGY	Active	2015-2016

## 2.4.2 View Agreement Details

To view an agreement, a service provider can either open the agreement link at the bottom of the Service Provider page or use either the Quick Search or List Agreement features.

From the *View Agreement* page, users can view agreements and individual site details. The page is broken down into five panels which contain pertinent information and links. These panels can be collapsed or expanded by clicking on the arrow in the right hand corner.

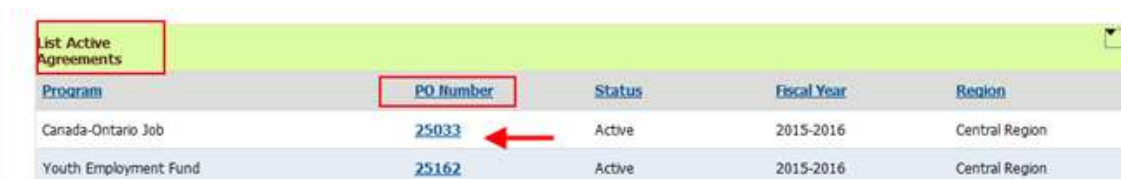


Service Provider	Agreements	Financials
Agreements - Shortcuts - List Agreements - View Agreement 30023		
Agreement Details		4
Service Delivery Sites		8
Pending Adjustments		4
Amending Agreements		4
Status History		4

## System Steps

### ➤ Step 1: Service Provider

Go to the **List Active Agreements** panel at the bottom of the *Service Provider* page. Once you have located the agreement, click the PO Number to view the details.



Program	PO Number	Status	Fiscal Year	Region
Canada-Ontario Job	25033	Active	2015-2016	Central Region
Youth Employment Fund	25162	Active	2015-2016	Central Region



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## ➔ Step 2: View Agreement

### Agreement Details panel

The Agreement Details panel contains information related to the agreement number and status, program, region and key dates. This is also where the agreement document PDF is located.

Click [View Agreement PDF](#) to view the agreement details.

The screenshot shows the 'Agreement Details' panel for agreement 25162. The panel is divided into two columns. The left column contains the following fields: Program (Youth Employment Fund), Service Provider (redacted), Agreement Effective Date (01/04/2015), Date Signed Agreement Received from Service Provider (31/03/2015), and Agreement End Date (30/09/2015). The right column contains the following fields: PO Number (25162), Region (Central Region), Status (Active), Date Signed Agreement Returned to Service Provider (redacted), and Courier (Courier #). A red arrow points to the 'View Agreement PDF' button at the bottom of the panel.

## Agreement Statuses

STATUS	DEFINITION
Under Review	Amending agreement has been sent to the service provider for review
Pending Active	Amending agreement has been returned by the service provider for ministry signature
Active	Agreement has been signed by both parties
Closed	Amending agreement version has been retracted or cancelled and may have been replaced with new version.

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## Service Delivery Site panel

The targets and budget information is managed at a site level. Each site contains a View Payment Schedule link and View Targets and Allocations link which allow service providers to view payments, targets and allocations, and request allocation/target adjustments.

Dashboard

Service Provider

Agreements

Financials

Monitoring

Calendar

Feedback

Service Delivery Sites

Site ID	Site Business Name		
4158E	St Ger College - Windsor - 2000 Talbot Rd W	<a href="#">View Payment Schedule</a>	<a href="#">View Targets and Allocations</a>
4158F	St Ger College, Thomas Campus - Chatham	<a href="#">View Payment Schedule</a>	<a href="#">View Targets and Allocations</a>

Pending Adjustments

Adjustment REF#	Reason	Site ID	Proposed By	Last Status Update (dd/mm/yyyy)	Status
<a href="#">2014-4158E-105-SD-01</a>	Increase Targets/Allocations	4158E	Barbara Landry	25/02/2015	Pending Active

## Pending Adjustments panel

This panel will display any payment or target and allocation adjustments which have been created and are not yet in “Active” status.

Pending Adjustments						
Adjustment REF#	Reason	Site ID	Proposed By	Last Status Update (dd/mm/yyyy)	Status	
<a href="#">2014-4158E-105-SD-01</a>	Increase Targets/Allocations	4158E	Barbara Landry	25/02/2015	Pending Active	

## Amending Agreements panel

Any amending agreements that have been generated will appear in this panel. The effective date indicates when the amending agreement is in effect. Each amending agreement will have a distinct Effective Date.

Click [Effective Date](#) to open the *View Amending Agreement* page with the individual amending agreement details. Refer to the next section for more details.

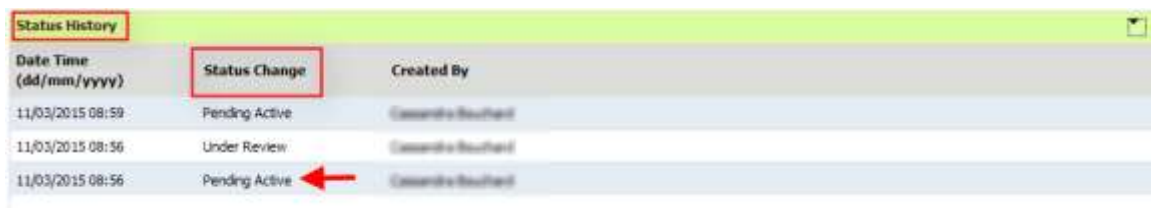
Amending Agreements	
Effective Date(dd/mm/yyyy)	Status
<a href="#">09/03/2015</a>	Under Review

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## Status History

Whenever the status of an agreement has changed, the system will record the date and time, the updated status, and the user name. This panel relates to the original agreement document history.



Date Time (dd/mm/yyyy)	Status Change	Created By
11/03/2015 08:59	Pending Active	Cassandra Bouffard
11/03/2015 08:56	Under Review	Cassandra Bouffard
11/03/2015 08:56	Pending Active	Cassandra Bouffard

## 2.4.3 View Amending Agreements

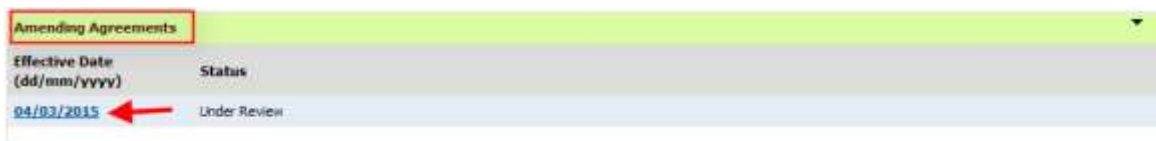
An amending agreement will not override the original service provider agreement; it denotes any changes negotiated between the ministry and service provider. To view the amending agreement, go to the *View Agreement* page and click on the Effective Date link in the **Amending Agreement** panel, as outlined in section 2.4.2.

### System Steps

#### ➤ **Step1:** *View Agreement*

From the *View Agreement* page, click the Effective Date in the **Amending Agreements** panel.

#### Amending Agreement Details panel



Effective Date (dd/mm/yyyy)	Status
<a href="#">04/03/2015</a>	Under Review

This panel is similar to the one on the *View Agreement* page but contains information related to the individual amendment. Each amendment has a separate *View Amending Agreement* page. Amending agreement statuses are the same as those for an agreement. Refer to 2.2.3 above.

To view the amending agreement document, click the View Agreement PDF button.

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Dashboard Service Provider **Agreements** Financials Monitoring Calendar Feedback

Agreements Shortcuts List Agreements View Agreement 25033 View Amending Agreement

**Amending Agreement Detail**

Program	PO Number	25033	Status	Active
Service Provider	Region	Central Region		
Agreement Effective Date(dd/mm/yyyy)	01/04/2015			
Date Signed Agreement Received from Service Provider(dd/mm/yyyy)	12/05/2015	Date Signed Agreement Returned to Service Provider(dd/mm/yyyy)	12/05/2015	Courier #

View Agreement PDF



If the status is “Under Review, this means an amending agreement was created and an e-mail notification has been sent to the Service Provider Corporate Contact to advise that they need to review and sign the amending agreement.

## 2.5 Payments

In SP Connect, the payment details are managed at a site level. Each site in an agreement has a payment schedule which shows payment details broken down by month. Most programs show a twelve month schedule from April to March, but some are less based on program requirements.

The *Payment Schedules* page can be access from the *View Agreement* page.

### 2.5.1 View Payment Schedule

The payment schedule shows the planned payments for each service delivery site and their statuses for the length of the agreement.

#### System Steps

##### ➔ Step 1: *View Agreement*

In the **Service Delivery Site** panel, click View Payment Schedule for the site.

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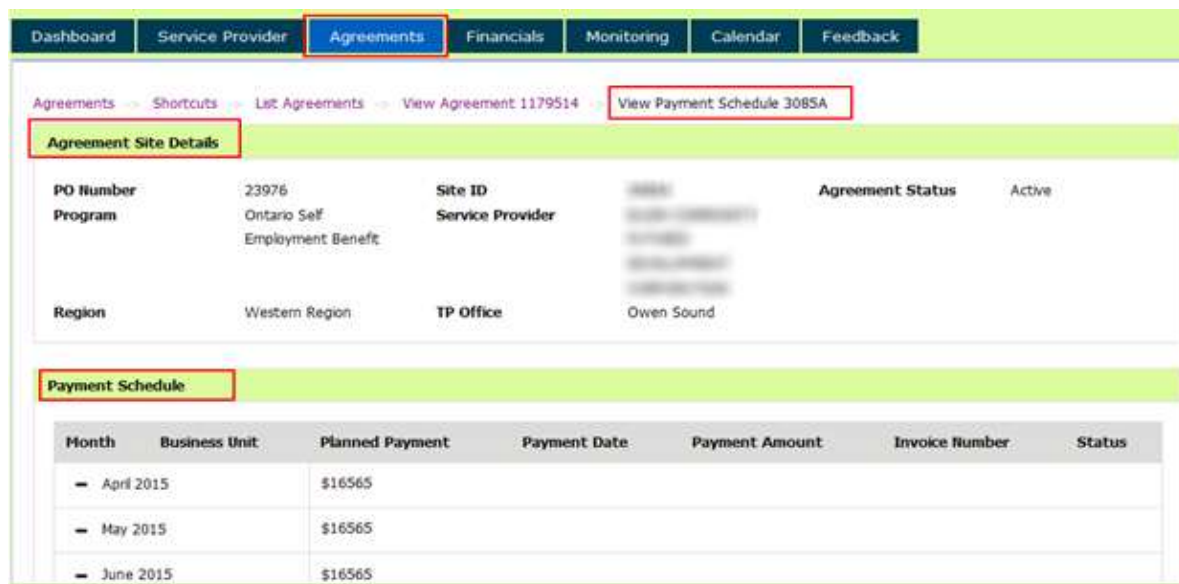


## ➔ Step 2: View Payment Schedule

The *View Payment Schedule* page consists of the following three panels:

The **Agreement Site Details** panel shows the agreement and service provider details including:

- PO Number - Also the agreement number
- Site ID - Site activity is carried out. The site ID aligned to the CaMS SDS ID
- Agreement Status
- Program Service Provider
- Region - Ministry region the agreement is with
- TP Office - Ministry local office the allocation is assigned to



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The **Payment Schedule** panel lists:

- Month - When payment will be made
- Business Unit – This is a ministry only field
- Planned Payment – Amount scheduled to be paid for the period
- Payment Date - Date when payments are made to the service provider
- Payment Amount - Actual amount paid to the service provider
- Invoice Number – Invoice number assigned to the payment
- Status – Where in the process the payment currently is. Refer to the chart below.

The payment schedule default view has all rows collapsed; click the arrow to the left of the **Month** column to view the specific payment details.



Month	Business Unit	Planned Payment	Payment Date	Payment Amount	Invoice Number	Status
April 2013	2567	\$22500				Pending
May 2013	2567	\$22500				Pending
June 2013		\$22500				
July 2013		\$22500				
August 2013		\$22500				
September 2013		\$22500				
October 2013		\$22500				
November 2013		\$22500				

A payment can have one of the following statuses:

Status	Description
Pending	The payment has not yet been made to the service provider.
Reconciled	The payment has successfully been paid to the service provider and reconciled between CMS and SP Connect.
Error	There is a payment discrepancy which will be corrected by the ministry.

If an adjustment has been made to the payment schedule by the ministry, it will be displayed in the **List Payment Adjustments** panel.

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List Payment Adjustments				
Adjustment REF#	Reason	Proposed By	Last Status Update	Status
<a href="#">PR-32148-YF-01</a>	Modify Planned Payment	<a href="#">View Details</a>	22/04/2013	Active

[Propose Payment Adjustment](#)

## 2.5.2 Generate Payment Report

Financials Report section contains access to payment reports that supports the financial administration of agreements.

The Fiscal Detail Payment report can be used to view service delivery site program payment schedule and year to date cashflow.

### System Steps

#### ➤ Step 1: Dashboard

Click the **Financials** section. The system displays the *Financial Home* page for the service provider associated to the user logged in.



#### ➤ Step 2: Financials

Click Payment Report from the *Financial Shortcuts* page.



#### ➤ Step 3: Payment Report

Enter as much information in the available fields. Fields marked with an asterisk are mandatory. Click Generate PDF.



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The screenshot shows the 'Financials' tab selected in the top navigation bar. Below it, the 'Payment Reports' section is active. The 'Report Type' is set to 'Fiscal Payment Detail Report', the 'Month' is 'April', and the 'Fiscal Year' is '2015-2016'. A red box highlights the 'Generate PDF' button, with a red arrow pointing to it from the right.

## ➔ Step 4: Payment Report PDF

The system opens a new window that displays a read-only PDF of the report.

2015-2016 Fiscal Payment Detail Report																
	Total Current Allocation	Last Confirmed Forecast	Forecast Month	April	May	June	July	August	September	October	November	December	January	February	March	YTD Cashflow
Central Region																
Canada-Ontario Job Grant																
Region of Ontario Job Grant																
000001	\$210,688	\$0	May	\$21,449	\$2,579	\$2,579	\$2,579	\$2,579	\$2,579	\$2,579	\$2,579	\$2,579	\$2,579	\$2,579	\$210,688	\$21,449
000002	\$300,937	\$0	May	\$34,917	\$3,884	\$3,884	\$3,884	\$3,884	\$3,884	\$3,884	\$3,884	\$3,884	\$3,884	\$3,884	\$300,937	\$34,917
000003	\$210,688	\$0	May	\$21,449	\$2,579	\$2,579	\$2,579	\$2,579	\$2,579	\$2,579	\$2,579	\$2,579	\$2,579	\$2,579	\$210,688	\$21,449
000004	\$154,089	\$0	May	\$19,136	\$2,018	\$2,018	\$2,018	\$2,018	\$2,018	\$2,018	\$2,018	\$2,018	\$2,018	\$2,018	\$154,089	\$19,136
000005	\$953,362	\$0	May	\$95,472	\$9,499	\$9,499	\$9,499	\$9,499	\$9,499	\$9,499	\$9,499	\$9,499	\$9,499	\$9,499	\$953,362	\$95,472
000006	\$199,935	\$0	May	\$19,401	\$991	\$991	\$991	\$991	\$991	\$991	\$991	\$991	\$991	\$991	\$199,935	\$19,401
000007	\$162,232	\$0	May	\$18,905	\$1,983	\$1,983	\$1,983	\$1,983	\$1,983	\$1,983	\$1,983	\$1,983	\$1,983	\$1,983	\$162,232	\$18,905
SP Total	\$1,942,465	\$0		\$211,439	\$23,323	\$23,323	\$23,323	\$23,323	\$23,323	\$23,323	\$23,323	\$23,323	\$23,323	\$23,323	\$1,942,465	\$211,439
Employment Service																
Region of Ontario Job Grant																
000001	\$1,385,250	\$0		\$115,270	\$115,270	\$115,270	\$115,270	\$115,270	\$115,270	\$115,270	\$115,270	\$115,270	\$115,270	\$115,270	\$115,270	\$1,385,250
000002	\$1,525,000	\$0		\$125,790	\$125,790	\$125,790	\$125,790	\$125,790	\$125,790	\$125,790	\$125,790	\$125,790	\$125,790	\$125,790	\$125,790	\$1,525,000
000003	\$1,682,023	\$0	April	\$138,913	\$138,913	\$138,913	\$138,913	\$138,913	\$138,913	\$138,913	\$138,913	\$138,913	\$138,913	\$138,913	\$138,913	\$1,682,023
000004	\$1,535,300	\$0		\$131,341	\$131,341	\$131,341	\$131,341	\$131,341	\$131,341	\$131,341	\$131,341	\$131,341	\$131,341	\$131,341	\$131,341	\$1,535,300
000005	\$975,000	\$0		\$86,293	\$86,293	\$86,293	\$86,293	\$86,293	\$86,293	\$86,293	\$86,293	\$86,293	\$86,293	\$86,293	\$86,293	\$975,000
000006	\$686,590	\$0		\$57,187	\$57,187	\$57,187	\$57,187	\$57,187	\$57,187	\$57,187	\$57,187	\$57,187	\$57,187	\$57,187	\$57,187	\$686,590
SP Total	\$7,565,725	\$0		\$625,368	\$625,368	\$625,368	\$625,368	\$625,368	\$625,368	\$625,368	\$625,368	\$625,368	\$625,368	\$625,368	\$625,368	\$7,565,725
Literacy and Basic Skills - Service Delivery																
Region of Ontario Job Grant																
000001	\$127,139	\$0		\$8,925	\$8,925	\$8,925	\$8,925	\$8,925	\$8,925	\$8,925	\$8,925	\$8,925	\$8,925	\$8,925	\$8,925	\$127,139
SP Total	\$127,139	\$0		\$8,925	\$8,925	\$8,925	\$8,925	\$8,925	\$8,925	\$8,925	\$8,925	\$8,925	\$8,925	\$8,925	\$8,925	\$127,139

## 2.6 Targets and Allocations

The agreement targets and allocation are managed at the site level. The format for targets is based on the specific program performance commitments. The allocation details are based on the program budget line breakdown.



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At the beginning of the agreement period, the values for both targets and allocations reflect those shown in the agreement schedules. If changes for targets and/or budgets are required, target and adjustment changes can be proposed and will then be reviewed by the ministry. Only once site target and allocation adjustments are approved and in active status will the new values be in place. Adjustments may result in amending agreements.

## 2.6.1 View Targets and Allocations

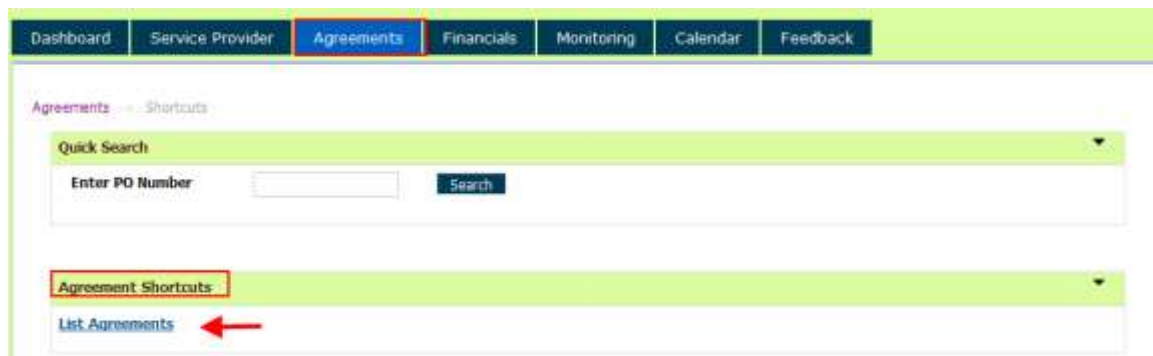
In order to view a site's targets and allocations, the Service Provider must have an active agreement.

### System Steps

#### ➤ **Step 1: Dashboard**

Click on *Agreement Panel*

Click on List Agreement in the **Agreement shortcuts** panel



#### ➤ **Step 2: List Agreement**

The system will display the List Agreement page

Click on the PO Number from the **List Agreements** panel

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PO Number	Program	SP Ref#	Service Provider	Status	Fiscal Year
25155	Youth Employment Fund	3007	Windsor College Employment Service	Active	2015-2016
25052	Canada-Ontario Job Grant	3007	Windsor College Employment Service	Active	2015-2016
24308	Summer Jobs Service	3007	Windsor College Employment Service	Active	2015-2016

## ➤ Step 3: View Agreement

The system will display View Agreement page, In the **Service Delivery Sites** panel, click the View Targets and Allocations link for the site.

Site ID	Site Business Name	View Payment Schedule	View Targets and Allocations
4330A	Windsor College Employment Service	<a href="#">View Payment Schedule</a>	<a href="#">View Targets and Allocations</a>

## ➤ Step 4: View Targets and Allocations

The *View Targets and Allocation* page displays the site details for the agreement. Service providers will see the following panels:

- **Agreement Site Details** (displays the PO details)

PO Number	Site ID	Agreement Status
24209	4330A	Active
Program	Employment Service	Service Provider
Region	Central Region	TP Office
		Bridgeland

- **Targets** (displays site performance commitments details. The format is based on the program requirements.)

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Targets			
Intake and Core Pleasures	Original Target	Current Target	Current SGS Value
Total Assisted Services	700	700	
Total Intake in Resource and Information (RI) Sessions/Workshops Activity	3,625	3,625	
Customer Satisfaction (Client/Participant/Employee)	90	90	1.35
Service Coordination	30	30	0.75
Employed/Career Path	49	49	1.73
Training/Education	10	10	0.10
Suitability (Participant Profile)	32	32	0.40
Intake in Assisted Services	330	330	0.50
Intake in Workshop Activities / Information Sessions	330	330	0.10
Service Quality Standard Commitments			0.41

- **Allocations** (displays Budget Line details)

Allocations		
Budget Line	Original Allocation	Current Allocation
Operating Funds	\$1,181,300	\$1,381,300
Employment and Training Incentives for Employees	\$133,000	\$133,000
Employment and Training Supports for Clients/Participants	\$7,000	\$7,000
Field Support	\$0	\$0
Other Funding 1	\$0	\$0
Other Funding 2	\$0	\$0
Total	\$1,381,300	\$1,381,300

- **List Target/Allocation Adjustments** (displays any Target and Allocation adjustments that have been proposed)

To view an adjustment, click the Adjustment Reference Number from the **List Target/Allocation Adjustments** panel.

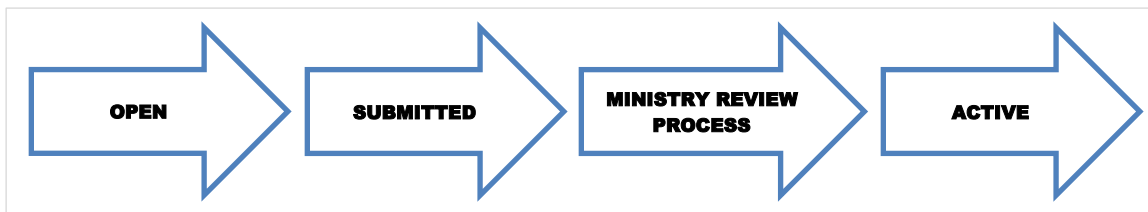
List Target/ Allocation Adjustments				
Adjustment Reference Number	Reason	Proposed By	Last Update Date	Status
<a href="#">IA-4330A-SJS-01</a>	Increase Targets/Allocations	Scott Brunton	05/05/2015 08:30	Local Office Recommended

## 2.6.2 Targets and Allocations Adjustments

There may be times during the life of an agreement when the site targets and allocations need to be updated. This is done by either the ministry or service provider proposing a site target and allocation adjustment. Once proposed, the adjustment will go through a number of ministry review stages. The proposed adjustment may move forward in the approval process or be rejected or returned to the service provider for additional information. The process will be outlined in the upcoming sections.

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Once the adjustment is proposed, ministry and service provider users can view the adjustment details and know its' status as it moves through the various stages from proposed to completed. Sites may have more than one adjustment completed over the duration of the agreement but only one adjustment for each agreement site can be completed at a time. For agreements with multiple sites where one or more sites may require adjustments, the process outlined below would be followed for each site.

There are a number of outcomes once a Target and Allocation Adjustment is proposed. The ministry will review and;

- Approve and complete an amending agreement
- Approve and send a notification (no amending agreement required)
- Send proposal back for updates and resubmission
- Close the adjustment request.

### 2.6.2.1 View Targets and Allocations Adjustments

To view the adjustment details to determine the reason for the adjustment, target and allocation changes and where it is in the process, users will access the *View Adjustment* page. This can be done from the **Adjustments** panel on the **Dashboard** or the *View Agreement* page.

#### **System Steps**

➤ **Step 1:** Repeat Step 1-3 in section 2.6.1 above, to open *View Agreement*

On the *View Agreement* page, in the **Pending Adjustments** panel, find the adjustment and click on the link. A Target and Allocation Adjustment is represented by "TA".

➤ **Step 2:** *View Adjustment*

The *View Adjustment* page is set up similar to the *View Targets and Allocations* page and has five panels:

- Adjustment Details
- Targets

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- Allocations
- Payment Information
- Status History

The **Adjustment Details** panel displays the details of the adjustment submitted and the status, including the reason for the adjustment, rationale and ministry comments)

**Adjustment Details**

Adjustment REF#	TA-4330A-SJS-01	Site ID	10000	Status	Local Office Recommended
PO Number	24016	Program	Summer Jobs Service		
Service Provider	[REDACTED]				
Reason	Increase Targets/Allocations				
Rationale	dfg				

The **Targets** panel displays the details of the Original Target, Current Target, Adjustment Amount and Proposed Target.

Intake and Core Measures	Original Target	Current Target	Adjustment Amount	Proposed Target
Total Placements (Number of Job Placements with Hiring Incentives)	407	407	3	410
Total Services (Number of Students Attending Workshops)	468	468		468
Customer Satisfaction (Participants/Employers)	100	100		100

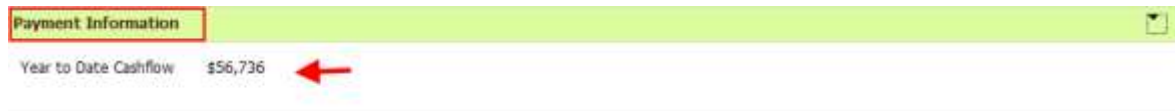
The **Allocations** panel displays the Budget Line details, Original Allocations, Current Allocation, Adjustment Amount and Proposed Allocation.

Budget Line	Original Allocation	Current Allocation	Adjustment Amount	Proposed Allocation
Operating Funds	\$94,560	\$94,560	\$40	\$94,600
Placement Incentives for Employers/Supports	\$283,681	\$283,681	\$0	\$283,681
Other Funding 1	\$0	\$0	\$0	\$0
Totals	\$378,241	\$378,241	\$40	\$378,281

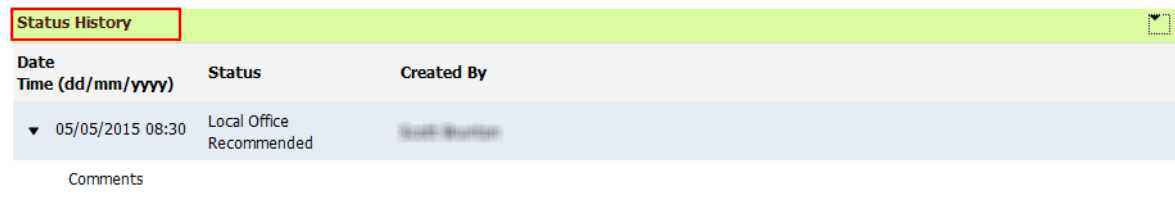
Business Unit: 3553 Approved Amount: \$40

The **Payment Information** panel displays the **Year to Date Cashflow**.

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The **Status History** panel tracks the time and date an adjustment was created and approved, as well as the user name, current status and comments.



## 2.6.2.2 Propose Target and Allocation Adjustment

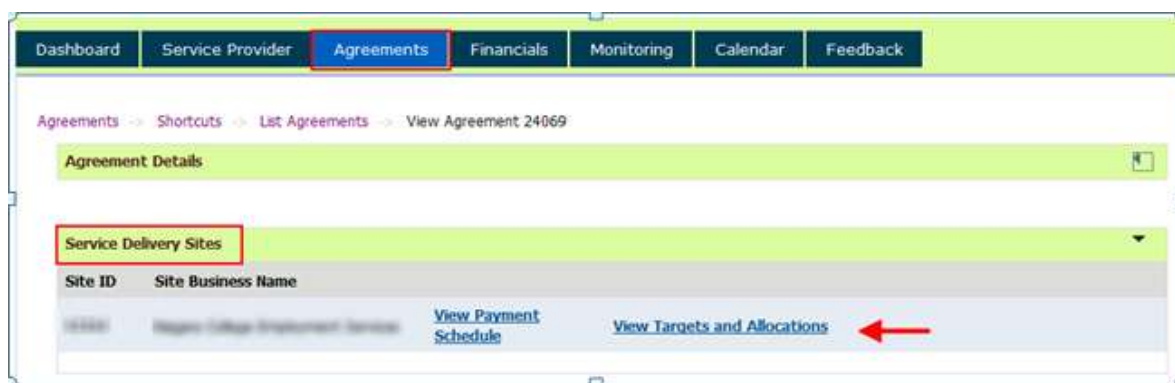
The business process to propose a Target and Allocation Adjustment should be discussed with your local office consultant. The SP Connect system process to propose a site Target and Allocation Adjustment can be completed by both service provider roles. Only the Service Provider Submission Authority can submit a Target and Allocation Adjustment.

The process to follow for proposing a Target and Allocation Adjustment begins on the *View Targets and Allocations* page.

### System Steps

➤ **Step 1:** Repeat Step 1-3 in section 2.6.1 above, to open *View Agreement*

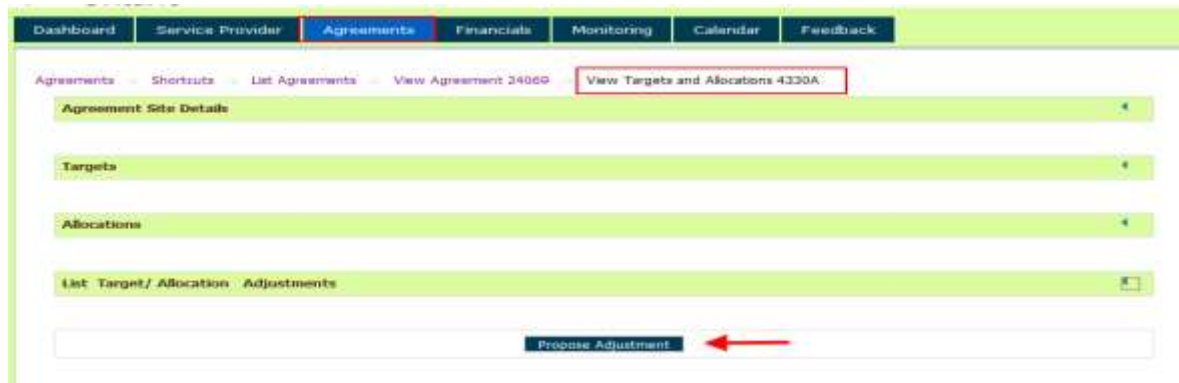
From the *View Agreement* page, in the **Service Delivery Sites** panel, find the correct Site ID and click View Targets and Allocations.



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## ➤ Step 2: View Targets and Allocations

At the bottom of the *View Targets and Allocation* page, click Propose Adjustment.



## ➤ Step 3: New Adjustment Proposal

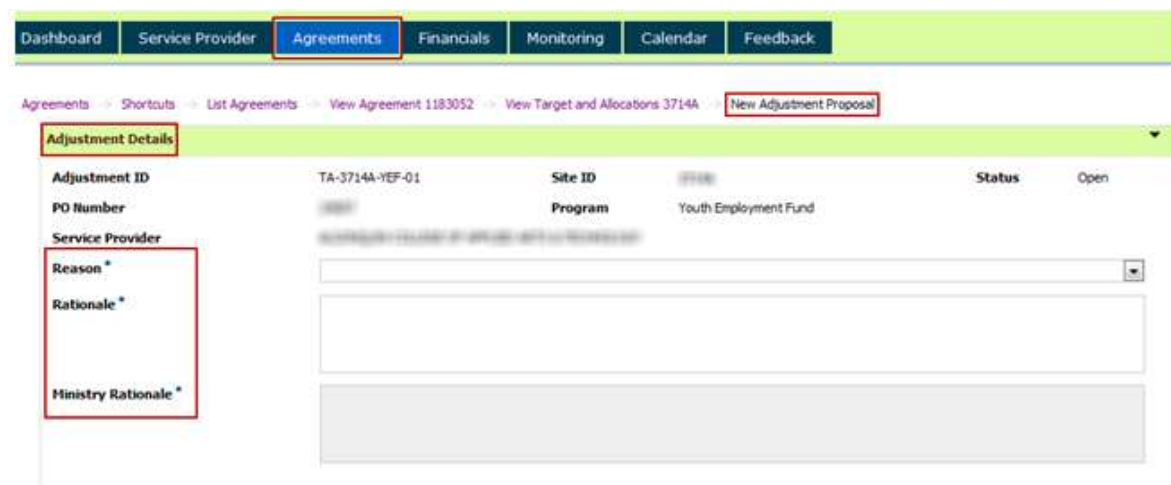
In the **Adjustment Details** panel, complete the mandatory fields.

**Reasons** drop-down consist of:

- Increase Targets/Allocations
- Decrease Targets/Allocations
- Transfer Between Budget Lines
- Transfer Between Sites

**Rationale** field is a text box of up to 500 characters to provide request details.

**Ministry Rationale** field is used by ministry staff to provide comments which are viewable by service provider users.



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## ➤ Step 4: New Adjustment Proposal

In the **Targets** panel, enter the **Adjustment Amount**.

Only enter the increased or decreased amount, not the full value. (For example, the current target is 1,260 and you want the new target to be 1,300. Enter only “40” in the field. The **Proposed Target** column will then be updated to read 1,300.

Dashboard	Service Provider	Agreements	Financials	Monitoring	Calendar	Feedback
Targets						
Intake and Core Measures	Original Target	Current Target	Adjustment Amount	Current SQS Value	Proposed Target	Proposed SQS Value
Total Assisted Services	1,260	1,260	<input type="text"/>		1,260	
Total Intake in Resource and Information (RI) Sessions/Workshops Activity	3,200	3,200	<input type="text"/>		3,200	
Customer Satisfaction (Client/Participant/Employer)	90	90	<input type="text"/>	1.35	90	1.35
Service Coordination	30	30	<input type="text"/>	0.75	30	0.75
Employed/Career Path	69	69	<input type="text"/>	1.73	69	1.73
Training/Education	10	10	<input type="text"/>	0.10	10	0.10
Suitability (Participant Profile)	28	28	<input type="text"/>	0.42	28	0.42
Intake in Assisted Services	100	100	<input type="text"/>	0.50	100	0.50
Intake in Workshop Activities / Information Sessions	100	100	<input type="text"/>	0.50	100	0.50
Service Quality Standard Commitments				5.35		5.35



Note: when proposing a decrease in the targets and/or allocation amount, a negative sign must be put in front of the number.

I.e. -1000

## ➤ Step 5: New Adjustment Proposal

In the **Allocations** panel, enter the **Adjustment Amount** for one or more of the budget lines in the available fields.



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Allocations					
Budget Line	Original Allocation	Current Allocation	Adjustment Amount	Proposed Allocation	
1 Operating Funds	\$1,212,120	\$1,212,120	<input type="text" value="0"/>	\$1,212,120	
2 Employment and Training Incentives for Employers	\$239,400	\$239,400	<input type="text" value="0"/>	\$239,400	
3 Employment and Training Supports for Clients/Participants	\$12,600	\$12,600	<input type="text" value="0"/>	\$12,600	
4 Field Support	\$0	\$0	<input type="text" value="0"/>	\$0	
5 Other Funding 1	\$0	\$0	<input type="text" value="0"/>	\$0	
6 Other Funding 2	\$0	\$0	<input type="text" value="0"/>	\$0	
Totals	\$1,464,120	\$1,464,120	\$0	\$1,464,120	

In the **Payment Information** panel, the Year to Date Cashflow will be displayed.

## ➤ Step 6: New Adjustment Proposal

The Propose Adjustment button is only available to the Service Provider Submission Authority user role. The Service Provider Administrator role will only see the Save Changes and Cancel buttons.

Ensure all the information in the adjustment is correct. Click Propose Adjustment.

Dashboard	Service Provider	Agreements	Financials	Monitoring	Calendar	Feedback
2 Employment and Training Incentives for Employers	\$239,400	\$239,400	950	\$240,350		
3 Employment and Training Supports for Clients/Participants	\$12,600	\$12,600	50	\$12,650		
4 Field Support	\$0	\$0	0	\$0		
5 Other Funding 1	\$0	\$0	0	\$0		
6 Other Funding 2	\$0	\$0	0	\$0		
Totals	\$1,464,120	\$1,464,120	\$5,810	\$1,469,930		

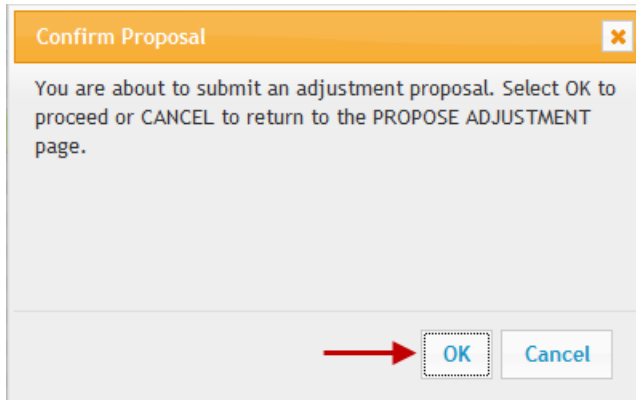
**Payment Information**

Year to Date Cashflow 122,010

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### ➤ Step 7: Confirm Proposal

The Confirm Proposal dialog box appears. Click OK.



### ➤ Step 8: View Targets and Allocations

Once confirmed, the page will refresh and open the *View Targets and Allocations* page. In the **List Target/Allocation Adjustments** panel, at the bottom of the page, the adjustment will be displayed and be in “Submitted” status. If the Save Changes button was selected in the previous step, the status would be “Open”. This allows the user to return to the adjustment at a later date to continue the process.

List Target/ Allocation Adjustments				
Adjustment Reference Number	Reason	Proposed By	Last Update Date	Status
IA-3007C-YEF-01	Increase Targets/Allocations	Amelia Graham	15/05/2015 12:07	Submitted



When the adjustment is submitted the changes will automatically be reflected under the **Proposed Target** and **Proposed Allocation** columns. Ensure that the amount is correct before you submit the adjustment. Some adjustments may not appear immediately in calculated fields as the data is refreshed every 30 minutes.

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When an adjustment is **Saved** or **Proposed**, a reference number is assigned to the adjustment. The naming convention of an adjustment is: **TA** (Target/Allocation) or **PY** (Payment)-Service Delivery Site ID-Program-Sequential number.

If at this point a decision is made not to proceed, click the Cancel button. This will not create an adjustment and will not appear anywhere on the service provider record.

The screenshot displays the 'Allocations' table with the following data:

Budget Line	Original Allocation	Current Allocation	Adjustment Amount	Proposed Allocation
1 Operating Funds	\$0	\$86,318	-318	\$86,000
2 Training Support for Learners	\$0	\$3,000	318	\$3,318
3 Field Support	\$0	\$0	0	\$0
4 Other Funding 1	\$0	\$0	0	\$0
5 Other Funding 2	\$0	\$0	0	\$0
6 Other Funding 3	\$0	\$0	0	\$0
7 Other Funding 4	\$0	\$0	0	\$0
8 Other Funding 5	\$0	\$0	0	\$0
9 Other Funding 6	\$0	\$0	0	\$0
10 Other Funding 7	\$0	\$0	0	\$0
11 Other Funding 8	\$0	\$0	0	\$0
12 Other Funding 9	\$0	\$0	0	\$0
13 Other Funding 10	\$0	\$0	0	\$0
<b>Total</b>	<b>\$863,318</b>	<b>\$103,318</b>	<b>\$0</b>	<b>\$103,318</b>

Below the table is the 'Payment Information' section with a 'Year to Date Cashflow' of 0. At the bottom, there are three buttons: 'Cancel', 'Propose Adjustment', and 'Save'. A red arrow points to the 'Cancel' button.

### 2.6.2.3 Submit Target and Allocation Adjustment Proposal

If the service provider initiated a Target and Allocation Adjustment but did not complete the Propose Adjustment step to submit the adjustment, the Service Provider Submission Authority can access the adjustment from the **Dashboard Adjustment** panel.

The submit process steps are the same as those shown above in step 6.

#### System Steps

##### ➔ Step 1: Dashboard

Click on the appropriate Ref# in the **Adjustment** panel to review the Target/Allocation Adjustment.

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The screenshot shows the 'Dashboard' tab selected in the top navigation bar. Below the navigation bar, the 'Adjustments' section is highlighted with a red box. It displays a table with 3 records. The table has columns: Ref #, Service Provider, Type, Last Updated By, Last Status Update, and Status. The third record, 'TA-3002H-ES-01', is highlighted with a red box.

Ref #	Service Provider	Type	Last Updated By	Last Status Update (dd/mm/yyyy)	Status
<a href="#">PY-3002D-YEF-05</a>	British Columbia, Ministry of Infrastructure (MTCU)	Payment Adjustment	Lorena Brown-McDonald	05/05/2015	Open
<a href="#">PY-3002E-ES-01</a>	British Columbia, Ministry of Infrastructure (MTCU)	Payment Adjustment	Ron Maki	05/05/2015	Open
<a href="#">TA-3002H-ES-01</a>	British Columbia, Ministry of Infrastructure (MTCU)	Target and Allocations	Rene Hertz	11/05/2015	Open

## ➤ Step 2: View Adjustment

In the **Adjustment Details** panel, enter the **Reason** and **Rationale** for the request.

The screenshot shows the 'Agreements' tab selected in the top navigation bar. Below the navigation bar, the 'Adjustment Details' panel is highlighted with a red box. It displays a form with fields for Adjustment REF#, PO Number, Service Provider, Reason, and Rationale. The Reason field is a dropdown menu with 'Increase Targets/Allocations' selected. The Rationale field is a text area with the text 'the reason for the adjustment request'. Red arrows point to the Reason and Rationale fields.

Adjustment REF#	TA-3002H-ES-01	Site ID	0000	Status	Open
PO Number	24239	Program	Employment Service		
Service Provider	British Columbia, Ministry of Infrastructure (MTCU)				
Reason *	Increase Targets/Allocations				
Rationale *	the reason for the adjustment request				

## ➤ Step 3: View Adjustment

Enter **Adjustment Amount** in the **Target** panel.

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Dashboard	Service Provider	Agreements	Financials	Monitoring	Calendar	Feedback
Targets						
Intake and Core Measures	Original Target	Current Target	Adjustment Amount	Current SQS Value	Proposed Target	Proposed SQS Value
Total Assisted Services	390	390	388		778	
Total Intake in Resource and Information (RI) Sessions/Workshops Activity	800	800	100		900	
Customer Satisfaction (Client/Participant/Employer)	95	95		1.43	95	1.43
Service Coordination	30	30		0.75	30	0.75
Employed/Career Path	69	69		1.73	69	1.73
Training/Education	10	10		0.10	10	0.10
Suitability (Participant Profile)	30	30		0.45	30	0.45
Intake in Assisted Services	100	100		0.50	100	0.50
Intake in Workshop Activities / Information Sessions	100	100		0.50	100	0.50
Service Quality Standard Commitments				5.46		5.46

## ➤ Step 4: View Adjustment

Enter the **Adjustment Amount** in the **Allocation** panel. Click Submit Proposal.

Allocations				
Budget Line	Original Allocation	Current Allocation	Adjustment Amount	Proposed Allocation
Operating Funds	\$864,435	\$864,435	426267	\$1,290,702
Employment and Training Incentives for Employers	\$74,100	\$74,100	73720	\$147,820
Employment and Training Supports for Clients/Participants	\$3,900	\$3,900	3880	\$7,780
Field Support	\$0	\$0	0	\$0
Other Funding 1	\$0	\$0	0	\$0
Other Funding 2	\$0	\$0	0	\$0
Totals	\$942,435	\$942,435	\$503,867	\$1,446,302

## ➤ Step 5: Submit Recommendation Confirm

The adjustment has been submitted with a status of "Submitted".

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Dashboard | Service Provider | **Agreements** | Financials | Monitoring | Calendar | Feedback

Agreements > Shortcuts > List Agreements > View Agreement 24239 > View Adjustment

**Adjustment Details**

Adjustment REF#	TA-3002H-ES-01	Site ID	[redacted]	Status	Submitted
PO Number	24239	Program	Employment Service		
Service Provider	[redacted]				
Reason	Increase Targets/Allocations				
Rationale	the reason for the adjustment request				

## 2.6.2.4 Update/Resubmit a Target and Allocation Adjustment

A service provider can go back and update any saved adjustments if it has not yet been submitted. This process can also be used if the ministry returned a proposed adjustment which needs to be resubmitted. If a Target and Allocation Adjustment is returned it will be in “Open” status and the history panel will show the details.

### System Steps

#### ➤ Step 1: Dashboard

Find the saved adjustment in the **Adjustments** panel. Notice the status is “Open”. Click the Ref#.

Dashboard | Service Provider | Agreements | Financials | Monitoring | Calendar | Feedback

Dashboard > Home

**Adjustments**

Number of Items: 1 of 1 records

Ref #	Service Provider	Type	Last Updated By	Last Status Update (dd/mm/yyyy)	Status
<a href="#">TA-4158A-535-01</a>	[redacted]	Target and Allocations	[redacted]	29/04/2015	Open

#### ➤ Step 2: View Adjustment

Complete the necessary changes. Users can edit the **Reason**, **Rationale**, and **Adjustment Amount** in both the Target and Allocation fields.

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Dashboard | Service Provider | **Agreements** | Financials | Monitoring | Calendar | Feedback

Agreements > Shortcuts > List Agreements > View Agreement 24021 > View Adjustment

**Adjustment Details**

Adjustment REF# TA-4158A-SJS-01 Site ID [REDACTED] Status Open

PO Number 24021 Program Summer Jobs Service

Service Provider [REDACTED]

Reason \* Increase Targets/Allocations

Rationale \* hhhjkl

**Targets**

Intake and Core Measures	Original Target	Current Target	Adjustment Amount	Proposed Target
Total Placements (Number of Job Placements with Hiring Incentives)	482	482	12	494
Total Services (Number of Students Attending Workshops)	554	554		554
Customer Satisfaction (Participants/Employers)	100	100		100

**Allocations**

Budget Line	Original Allocation	Current Allocation	Adjustment Amount	Proposed Allocation
Operating Funds	\$112,173	\$112,173	0	\$112,173
Placement Incentives for Employers/Supports	\$336,517	\$336,517	0	\$336,517
Other Funding 1	\$0	\$0	0	\$0
<b>Totals</b>	<b>\$448,690</b>	<b>\$448,690</b>	<b>\$0</b>	<b>\$448,690</b>

## ➤ Step 3: View Adjustment

Click Save if you wish to make further adjustments/review or click Submit Proposal to send the adjustment to the ministry.

**Payment Information**

Year to Date Cashflow \$0

[Save](#) [Submit Proposal](#) [Close Adjustment](#)

**Status History**

Date Time(dd/MM/yyyy hh:mm)	Status	Created By
29/04/2015 12:21	Open	Admin SP Connect

Comments





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The **Comments** field is used to provide an explanation for closure.

Dashboard Service Provider **Agreements** Financials Monitoring Calendar Feedback

Agreements > Shortcuts > List Agreements > View Agreement > View Amending Agreement > View Adjustment > **Close Adjustment**

You are closing this adjustment proposal. Provide the closure reason and check the box to notify the service provider.

**Closure Reason \*** Opened in Error

☐ Notify Service Provider

**Comments \*** open in error

OK Cancel

List Target/ Allocation Adjustments				
Adjustment Reference Number	Reason	Proposed By	Last Update Date	Status
<a href="#">TA-4158A-575-01</a>	Increase Targets/Allocations	None (SP User)	29/04/2015 12:44	Closed



Note: Service Provide can only close a saved Target and allocation Adjustment, once it is submitted, the Service provider can no longer make any changes.