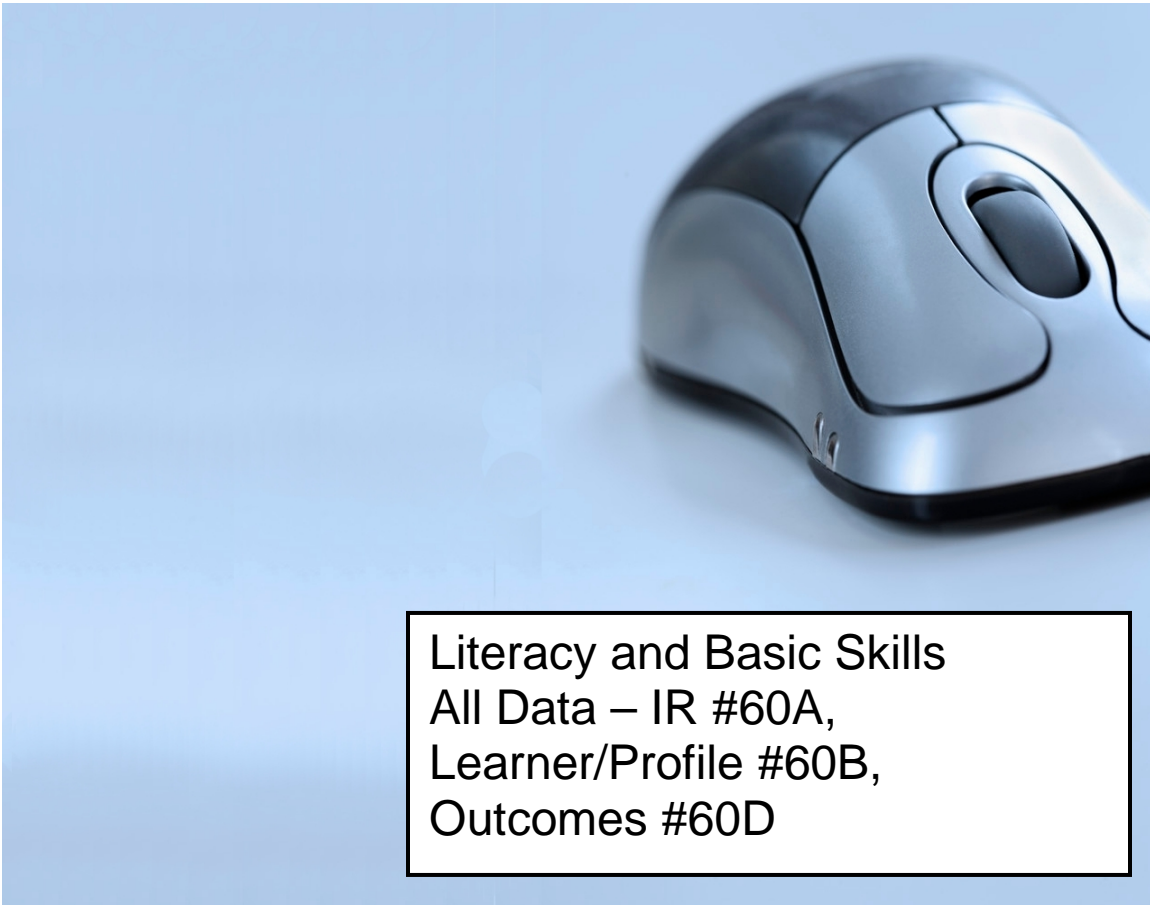


EOIS Case Management System

Service Provider User Guide: Reporting



Document History

| Version # | Date | Description |
|-----------|--------------|---------------------------------|
| 1.0 | October 2012 | Initial version for Release 3.1 |
| 1.1 | April 2013 | Added Reports #60B and #60D |

Using the Guide

Users should consider the following when using this guide:

- All detailed report user guides are located on the EOIS Service Provider Reporting Website under the affiliated “Guide” link. As this website retains a history of the guides, it is recommended that the guide link be used in conjunction with the report.
- The EOPG website (www.eopg.ca) has the latest versions, as well as the overall EOIS-CaMS user guide (Chapter 10 - Reporting), under the “Guides and Resources” section. This chapter is recommended to be reviewed as a starting point.
- Throughout this user guide specific types of items are distinguished through the following text styles:
 - CaMS page names have been italicized and CaMS field names have been placed in quotes. For example, data is drawn from the *Plan Content* page, “Status” and “Outcome” fields, for the sub-goal “Training Supports.”
 - Titles that refer directly to the report titles, column or row headings or specific CaMS fields have been capitalized. For example, the service plan information is displayed in the Service Provider column of the report.

Literacy and Basic Skills All Data – Information and Referral #60A

Description

This report shows all year-to-date Literacy and Basic Skills (LBS) Information and Referral (IR) data for each service delivery site. Provincial and regional roll up reports are also available under the Rollup Reports section of the EOIS Service Provider Reporting Website.

Access

This report is available to all service provider and MTCU report users.

Format, Schedule and Retention

This report is produced in PDF format. It will be available to users the second Monday of the following month and a total of 37 months of reports are retained.

Data Filtering

Includes all information sessions where the “Start Date” falls within the fiscal year. LBS Information Session records that have a status of “Cancelled” are excluded.

All IR data entered by service providers (*Participation* and *Wait List* data), where the “Month” and “Year” falls within the fiscal year.

Data Sources

The information in this report is drawn from the three pages within the *Resource and Information* folder (*Information Sessions*, *Participation* and *Wait List*) on the *Service Home* page:

Information Sessions

Information Session (Information Session and Outreach) information is drawn from the *Information Session* page. Information Sessions with a status of “Cancelled” are excluded.

Participation

Participation (Number of Individuals served by IR (visitors), Number of Individuals referred to other Literacy Providers and Number of Individuals referred to other Programs and Services) information is drawn from the *Participation* page.

Wait List

Wait List (Number of Individuals on the wait list) information is drawn from the *Wait List* page.

Literacy and Basic Skills All Data – Learner/Profile #60B

Description

This report summarizes all Literacy and Basic Skills (LBS) learner profile information based on LBS service plans being “Active” during the fiscal year for each service delivery site. Used primarily by service providers for program evaluation and data monitoring purposes.

This report refers to information that attributes to the numbered core measures noted on Service Quality reports, to allow for a service delivery site manager to preview and monitor progress. In most cases the result will not be equivalent due to most Service Quality report measures being based on closed service plans.

Provincial and regional reports are also available under the Rollups section of the EOIS Service Provider Reporting website.

Access

This report is available to all service provider and MTCU report users.

Format, Schedule and Retention

This report is produced in PDF format. It is available the second Monday of the following month and a total of 37 months of reports are retained.

Data Filtering

All LBS service plans that were “Active” during the report period. Closed service plans are included if they were “Active” during the report period and do not have a “Closure Reason” of “Opened in Error”.

All sections of this report, with the exception of the Expenditures and Unique Learners Served, are based on service plans. If a learner has more than one service plan in the report period, they are counted for each service plan.

Data Sources

The information in this report is drawn from *Person Home*, *Service Plan Home*, *Plan Item Details*, and *Client Summary* pages.

EOIS Case Management System Service Provider User Guide

Service Intake Section

Service Intake is drawn from the *Service Plan Home* page. A learner is considered New if their service plan “Start Date” is on or after the start of the report period, and considered Carryover if their service plan “Start Date” is before the start of the report period. If a Learner has more than one service plan in the report period, then they are counted for each service plan.

For Unique Learners Served, a learner is only counted once, regardless of the number of service plans. A unique learner is counted as a Carryover if they have service plans that would fit in both the New and Carryover counts. The Unique Learners Served measure (indicated as core measure #7) may not match Service Quality Reports.

Service Intake with no client summary: This section also provides counts of the number of service plans that either have or do not have a *Client Summary*, these counts are used as the denominators for the Learner Profile section of the report to ensure percentage based results are accurate.

Referral Section

The Referral section is drawn from *Plan Item Details*, and *Service Plan Home* pages.

Referral to Other Programs and/or Referral Out to Other Community Resources are drawn from the *Plan Item Details* page. The plan item must have a status of “In Progress” or “Completed”.

Referred In is drawn from the *Service Plan Home* page, *Case Details* panel.

Expenditure Section

Expenditure information is drawn from *Plan Item Details* page. Expenditures are based on the “Actual Cost” of training support plan items (Transportation, Childcare and Custom Basic) with a status of “In Progress” or “Completed” These expenditure totals will differ from Service Quality reports as the SQ report shows expenditures based on closed service plans.

The Average is based on the expenditure amount divided by the number of unique learners associated with the expenditure; the number of associated learners is noted on the report beside expenditure amount.

Service Coordination Section

This section shows a preliminary view of referral indicators that contribute to service coordination performance measures (Referred In from Other Organizations, Referred Out – Registered for education/training to complete high school or equivalent, Referred Out – Registered/participating in training, Referred Out – Registered in ES and “Referred Out – Registered or confirmed receiving services with community resources that support learning). This service coordination information (indicated as core measure

EOIS Case Management System Service Provider User Guide

#2) will not match Service Quality reports as SQ reports show service coordination based on closed service plans.

Referred In “Employment Ontario” and “Non Employment Ontario” grouping definitions are provided in the Appendix.

Learner Profile Section

The Learner Profile section is based on information drawn from the *Person Home*, *Service Plan Home* and *Client Summary* pages.

The following information is drawn from the *Person Home* page: Age, Preferred language of service, Gender, Self- identified, Length of time in Canada; percentage values are based on Service Intake.

Goal path (new learners) and Goal path (carryover) is drawn from the *Service Plan Home* page; percentage values are based the applicable Service Intake figures for New and Carryover.

The remaining learner profile section is drawn from the *Client Summary*: percentage values are based on Service Intake with Client summary: Highest Level of Education Completed, Country Highest Level Education Completed, Employment Experience, Time out of Work, Time out of Training, Time out of Formal Education, History of Interrupted Education, Source of Income, Labour Force Attachment, Entry Assessment Tool, Entrance Learner Gains Score, Estimated Learner Weekly Time commitment, Language Spoken at Home, Language Spoken at Last Workplace, Service Provision Language and the four Canadian Language Benchmark Assessments (Speaking, Listening, Reading and Writing).

The profile information in this section (indicated as core measure #3) will differ from Service Quality Reports as SQ profile information is based on closed service plans.

Progress Section

Learners who have completed at least one milestone is drawn from *Plan Item Detail pages*. It is based on a completed sub-goal type of “Competencies” (excluding “Learning Activities”) with at least one plan item with an outcome of “Attained”. In this case, learners who have completed at least one milestone (indicated as core measure #5) should match Service Quality reports as it is based on the same report criteria.

Literacy and Basic Skills All Data – Outcomes #60D

Description

This report summarizes LBS completion information and 3, 6, and 12 month follow-up outcomes for each service delivery site. Used primarily by service providers for program evaluation and data monitoring purposes.

This report refers to information that attributes to the numbered core measures noted on Service Quality reports; the results should be equivalent to the Service Quality report as both reports are based on the same criteria, with a few exceptions noted below.

Provincial and regional reports are also available under the Rollups section of the EOIS Service Provider Reporting website.

Access

This report is available to all service provider and MTCU report users.

Format, Schedule and Retention

This report is produced in PDF format. It is available the second Monday of the following month and a total of 37 months of reports are retained.

Data Filtering

This report shows all year-to-date closed Literacy and Basic Skills (LBS) service plan outcome information based on the following status and date fields: LBS service plans with a status of “Closed” that have a “Closure Date” or have a follow-up Review “Actual End Date” in the report period.

Follow-up reviews and service plans and that are closed with a “Closure Reason” of “Opened in Error” are excluded from the report.

Data Sources

The information in this report is drawn from *Service Plan Home*, *Plan Item Details*, *View Review* and *Employment* pages of CaMS.

Outcomes at Exit Section

Closure Reasons and Completions

This information is drawn from the *Service Plan Home* page. The percentage for completions and non-completions is based on the total closure reasons. The percentage for the breakout list is based on non-completions.

EOIS Case Management System Service Provider User Guide

Outcomes

Outcomes are drawn from the *Service Plan Home* page. Employed outcome types are grouped and subtotaled; individual percentages are based upon the total Employed Outcomes number. Training/Education outcome types are grouped and subtotaled; percentages are based on the total Training/Education Outcomes. Total Employed and Training/Education subtotal and the other outcomes (Independent, Unable to work, Unemployed, Unknown and Volunteer) percentages are based on the Total Outcomes.

Average Calculations

This section shows the average employed wage drawn from the *Employment* page under the *Background* folder; participant satisfaction drawn from the *Service Plan Closure Details*. Average duration, shown only in the exit section, is drawn from the *Service Plan Home* page.

Please see the Appendix for all Average calculation details.

Assessment Section

Average Completed Milestones

Average completed Milestones by goal path is drawn from *Plan Item Detail* pages. It is based on a completed sub-goal type of “Competencies” (excluding “Learning Activities”) with at least one plan item with an outcome of “Attained”. The average is calculated based on the number of completed Milestones for each service plan and then divided by the total number of service plans for each goal path type.

Learner Gains Scores

The Entrance Learner Gains Scores for Exited Learners is drawn from the *Client Summary* page, and Exit scores from the *Service Plan Closure Details* page.

Learners who show gains (indicated as core measure #6) is based on the number of learners with Exit score at least 1 number higher than their Entrance score. The results may not be equivalent to the Service Quality report.

The Average increase in Learners Gains Scores is based on the sum of all learner entrance scores subtracted from the sum of all learner exit scores then divided by the total number of learners with exit scores.

The Average Gain period measured in weeks is displayed for all learners who have both Entrance and Exit Learner Gains Scores. The Average is based on the number of days between the “Date of Assessment (for learner gain score)” and the “Date of Exit Learner Gains Score” divided by 7.

Completions, All Milestones Completed, Culminating Tasks and Learning Activities Completions is defined as Learners who have completed all three indicators (their Milestones* drawn from *Plan Item Details* page; Culminating Tasks and Learning Activities drawn from *Service Plan Closure Detail* page) divided by the total number of

EOIS Case Management System Service Provider User Guide

closed service plans. *Milestones must have a completed sub-goal type of “Competencies” (excluding “Learning Activities”) with at least one plan item with an outcome of “Attained”. All four areas are indicated with a core measure #4; the results for Completions and All Milestones Completed should be equivalent to the Service Quality report as both reports are based on the same criteria; the results for Culminating Tasks and Learning Activities Completions may not be equivalent to the Service Quality report.

Self-Reported Learner Weekly Time Commitment is drawn from the *Service Plan Closure Details* page and is based on the total number of service plans that have this data recorded.

Outcomes at 3, 6 and 12 months Sections

Outcomes and Average calculations for 3, 6 and 12 month sections are based on the same criteria as the Outcomes at Exit Section noted above, where the Follow up Review “Actual End Date” is within the report period.

Appendix – Detailed Column Descriptions

IR Report #60A

| Column Names | | Description |
|---|---|---|
| English | French | |
| Number of Individuals served by IR (visitors) | Nombre de personnes participantes en I et A (visiteurs) | Sum of “# Individuals Served” entered for the fiscal year. |
| Number of Individuals referred to other Literacy Providers | Nombre d’individus recommandés vers d’autres fournisseurs de littératie | Sum of “# Individuals referred to other literacy providers” entered for the fiscal year. |
| Number of Individuals referred to other Programs and Services | Nombre d’individus recommandés vers d’autres programmes et services | Sum of “# Individuals referred to other programs/services” entered for the fiscal year. |
| Number of Individuals on the wait list | Nombre d’individus sur la liste d’attente | Sum of “# Individuals on the Wait List” entered for the fiscal year. |
| Total ALL Audiences | Total TOUT public | Total number of sessions and attendees for all audience types (“Employers”, “General Public”, “Newcomers” and “Students”). |
| Information Session (ALL Audiences) | Session d’information | Total number of sessions and attendees for “Information Session” by all audience types (“Employers”, “General Public”, “Newcomers” and “Students”). |
| Outreach (ALL Audiences) | Sensibilisation | Total number of sessions and attendees for “Outreach” by audience types (“Employers”, “General Public”, “Newcomers” and “Students”). |
| Total Employers | Total employeurs | Total number of sessions and attendees by audience type “Employers”. |
| Information Session (Employers) | Session d’information | Total number of sessions and attendees for “Information Session” by audience type “Employers”. |
| Outreach (Employers) | Sensibilisation | Total number of sessions and attendees for “Outreach” by |

EOIS Case Management System Service Provider User Guide

| Column Names | | Description |
|--------------------------------------|--------------------------|---|
| English | French | |
| | | audience type “Employers”. |
| Total General Public | Total du public général | Total number of sessions and attendees by audience type “General Public”. |
| Information Session (General Public) | Session d’information | Total number of sessions and attendees for “Information Session” by audience type “General Public”. |
| Outreach (General Public) | Sensibilisation | Total number of sessions and attendees for “Outreach” by audience type “General Public”. |
| Total Newcomers | Total nouveaux arrivants | Total number of sessions and attendees for audience type “Newcomers”. |
| Information Session (Newcomers) | Session d’information | Total number of sessions and attendees for “Information Session” by audience type “Newcomers”. |
| Outreach (Newcomers) | Sensibilisation | Total number of sessions and attendees for “Outreach” by audience type “Newcomers”. |
| Total Students | Total étudiants | Total number of sessions and attendees by audience type “Students”. |
| Information Session (Student) | Session d’information | Total number of sessions and attendees for “Information Session” by audience type “Students”. |
| Outreach (Student) | Sensibilisation | Total number of sessions and attendees for “Outreach” by audience type “Students”. |

EOIS Case Management System Service Provider User Guide

Service Plan / Profile Report #60B

| Column Names | | Description |
|--------------------------------------|--|--|
| English | French | |
| Employment Ontario organizations | Organismes d'Emploi Ontario | Total number and percentage of participants by category where the client was referred in from: <ul style="list-style-type: none">• "Apprenticeship Program"• "Co-op Diploma Apprenticeship Program"• "Literacy and Basic Skills Service Provider"• "Ontario Job Bank"• "Ontario Youth Apprenticeship Program"• "Pre-Apprenticeship Program"• "Summer Job Service" |
| Non Employment Ontario organizations | Organismes non-associés à Emploi Ontario | Total number and percentage of participants by category where the client was referred in from: <ul style="list-style-type: none">• "Bridge Training for Immigrants"• "Independent Learning Centre"• "Ministry of Citizenship and Immigration"• "Ontario Disability Support Program"• "Ontario Internship Program"• "Ontario Women's Directorate"• "Ontario Works"• "Employment Service Provider"• "Govt Training Provincial"• "Govt Training Federal"• "Govt services Municipal"• "Service Canada"• "Services for Aboriginal People"• "Youth Employment Strategy"• "Other" |

EOIS Case Management System Service Provider User Guide

Outcomes Follow-ups Report #60D

| Column Names | | Description |
|---|--|---|
| English | French | |
| Average Employed Wage* | Moyenne salariale & taux de réponse | Sum of wages from applicable employment records divided by the number of applicable employment records (rounded to 2 decimal points). Note: Employment records with a zero "Wage Amount" or a "Status" of "Cancelled" are excluded from the calculation. |
| Average Employed Wage Response Rate | Moyenne salariale taux de réponse | Number of closed service plans that have associated employment records divided by the total number of closed service plans or estimated reviews to be completed. Note: Employment records with a zero "Wage Amount" or a "Status" of "Cancelled" are excluded from the calculation. |
| Average Program Duration (weeks) | Durée moyenne du programme (semaines) | Only shown in the exit section. (service plan "Closure Date" minus service plan "Start Date") divided by 7 |
| Follow-up Response rate | Taux de réponse du suivi | Only shown in the outcomes at 3, 6, 12 months section Total number of completed reviews (those with an "Actual End Date") divided by the total number of estimated reviews to be completed (those with a "Scheduled Start Date"). |
| Participant Satisfaction with service quality | Satisfaction de la clientèle par rapport à la qualité/ | Sum of closed service plans with a satisfaction rating of 4 or 5 divided by satisfaction ratings from 1 to 5. For follow-up reviews, sum of "Yes" responses divided by the total number of case reviews. |
| Response Rate | Taux de réponse | Sum of closed service plans with a satisfaction rating of 1 through 5 divided by satisfaction ratings 1 through 6 (6 being no response). For follow-up reviews, sum of "Yes" responses divided by the sum of (Yes/No and No Response). |

* Wage information filters into the report based on the date of the employment record in association with the service plan "Closure Date" or the follow-up Review "Actual End Date". The wage value hourly rates are calculated as follows:

EOIS Case Management System Service Provider User Guide

- Weekly. Rate = 'Wage Amount' / 'Hours Per Week'
- Bi-Weekly. Rate = 'Wage Amount' / ('Hours Per Week' * 2)
- Monthly. Rate = 'Wage Amount' / ('Hours Per Week' * 4.33)
- Annum. Rate = 'Wage Amount' / ('Hours Per Week' * 52)