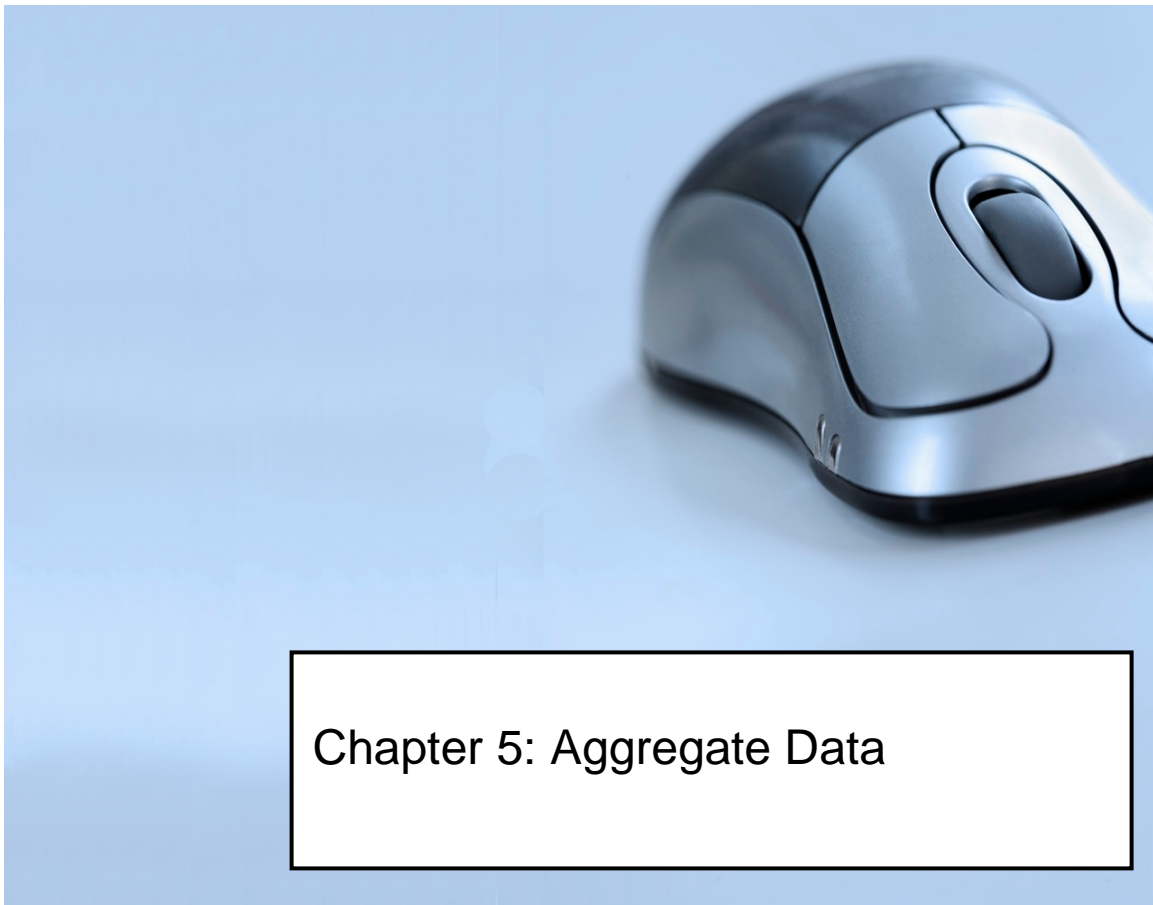


# **EOIS Case Management System Service Provider User Guide**



**Version: 2.6  
August 2015**

## Document History

Version #	Date	Description
1.0	July 23, 2010	Initial version released prior to the launch of the system on August 4, 2010.
1.01	May 2011	Added: 5.3.4 Deleting Information Session Data.
2.0	January 2012	Review and edit for Release 3.0.
2.1	April 2012	Chapter revised to reflect new screens for capturing aggregate data.
2.2	April 2013	Chapter revised to reflect new screens for capturing aggregate data for the Ontario Self-Employment Benefit Program
2.3	August 2013	Chapter updated to include Youth Employment Fund within Employment Service Information Sessions
2.4	July 2014	Updates to reflect new Release 4.0 user interface.
2.5	May 2015	Updated chapter title to better reflect content.
2.6	August 2015	Removed all references to Youth Employment Fund.  Updates to: <ul style="list-style-type: none"><li>• 5.3.3 Add Information Sessions Data</li><li>• 5.34 Verify/Modify Information Sessions Data</li><li>• 5.35 Add/Modify Wait List Data</li></ul>

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## 5 Aggregate Data

Service providers are responsible for providing the ministry with Aggregate Data from unassisted services. These results are captured in the Aggregate Data section of the Case Management System (the system). This data is captured at the service delivery site level of the service provider, as each individual service delivery site must submit its own Aggregate Data to the ministry on a monthly basis.

The categories of Aggregate Data that must be submitted to the ministry are specific to the Employment Ontario program:

- Employment Service (ES) – Participation, Customer Satisfaction and Information Sessions
- Summer Jobs Service (SJS) – Information Sessions
- Literacy and Basic Skills (LBS) – Information Sessions, Participation and Wait List
- Ontario Self-Employment (OSEB) Program – Information Sessions and Aggregate Data

### 5.1 Roles

While any service provider user of the Case Management System can view Aggregate Data belonging to their service provider, the data can only be entered into the system by Service Provider Managers and Service Provider Administrators.

	Search/View Aggregate Data	Create/Modify Aggregate Data
Service Provider Manager	✓	✓
Service Provider Caseworker	✓	
Service Provider Administrator	✓	✓
Ministry Caseworker	Services section within <i>Service Delivery Site</i> <i>Home</i> page only	
Ministry Manager	✓	

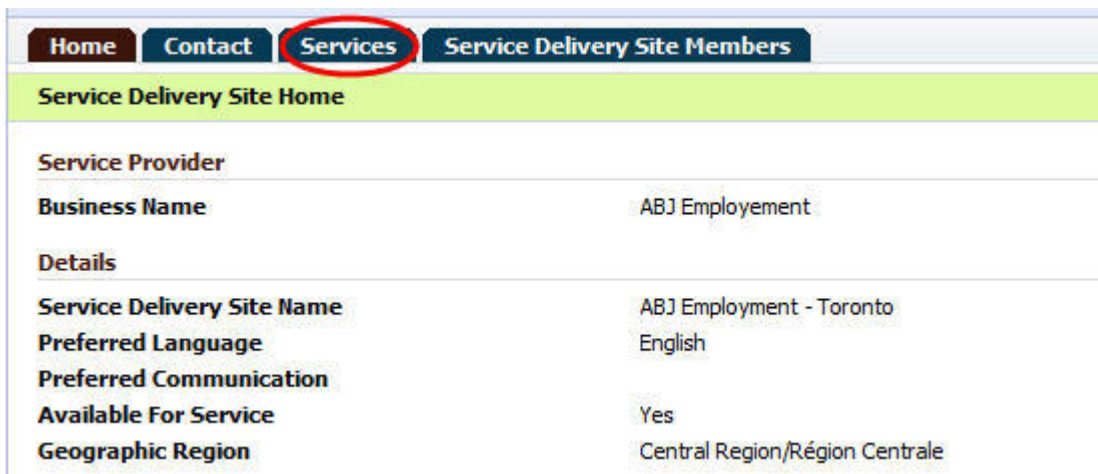
## 5.2 Viewing Aggregate Data

Aggregate Data for all Employment Ontario programs is captured within the **Services** section at the service delivery site level and can be viewed by system users assigned to that specific service provider.

### System Steps

#### ➤ **Step 1:** *Service Delivery Site Home*

Select the **Services** tab.



Service Delivery Site Home	
<b>Service Provider</b>	
<b>Business Name</b>	ABJ Employment
<b>Details</b>	
<b>Service Delivery Site Name</b>	ABJ Employment - Toronto
<b>Preferred Language</b>	English
<b>Preferred Communication</b>	
<b>Available For Service</b>	Yes
<b>Geographic Region</b>	Central Region/Région Centrale

#### ➤ **Step 2:** *Services*

A list of all programs associated with the service delivery site will be displayed. Click the Name of the service.



<u>Name</u>	<u>Start Date</u>	<u>End Date</u>
<a href="#">Summer Jobs Service</a>	24/6/2014	

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## ➔ Step 3: Service Home

Click the **Aggregate Data** tab.

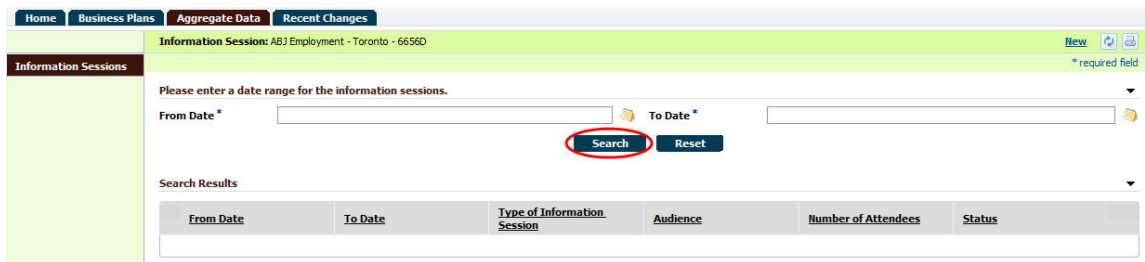


The screenshot shows the 'Service Home' page. At the top, there is a navigation bar with four tabs: 'Home', 'Business Plans', 'Aggregate Data', and 'Recent Changes'. The 'Aggregate Data' tab is highlighted with a red circle. Below the navigation bar, the page title is 'Service Home'. Underneath, there is a section for 'Service Delivery Site' with the following details:

Name	ABJ Employment - Toronto
<b>Details</b>	
Name	<a href="#">Summer Jobs Service</a>
Start Date	24/6/2014
End Reason	

## ➔ Step 4: Aggregate Data

Select the data you would like to view in the Tab Content Bar.



The screenshot shows the 'Aggregate Data' page. At the top, there is a navigation bar with four tabs: 'Home', 'Business Plans', 'Aggregate Data', and 'Recent Changes'. The 'Aggregate Data' tab is highlighted. Below the navigation bar, the page title is 'Information Session: ABJ Employment - Toronto - 66560'. There is a 'New' button and a '\* required field' label. Below the title, there is a section for 'Information Sessions' with the following details:

Please enter a date range for the information sessions.


From Date \*  To Date \*

Search Results

From Date	To Date	Type of Information Session	Audience	Number of Attendees	Status


## 5.3 Creating and Modifying Aggregate Data

Service provider users enter aggregated Aggregate data for individual service delivery sites and individual services.

	The system will allow Aggregate data to be modified at any time, if the data is from the current fiscal year.
---	---

### 5.3.1 Add/Modify Customer Satisfaction Data

**For Employment Service ONLY:**

	Only a single Customer Satisfaction record can be recorded in the system per month for a service delivery site for a single respondent type, though the record may be modified.
---	---

#### System Steps

➤ **Step 1:** *Aggregate Data*

Select **Customer Satisfaction** in the Tab Content Bar.

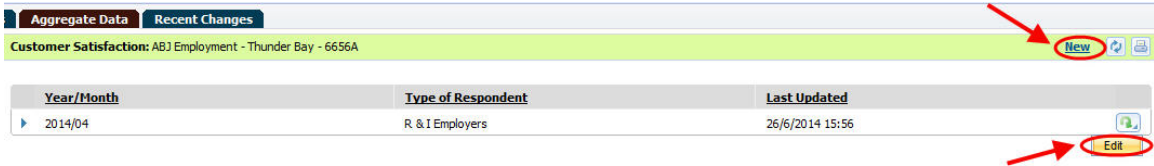


Home	Business Plans	Aggregate Data	Recent Changes
Customer Satisfaction: ABJ Employment - Thunder Bay - 6656A			
Customer Satisfaction	Information Sessions	Participation	
Year/Month	Type of Respondent		
▶ 2014/04	R & I Employers		

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## ➤ Step 2: Customer Satisfaction

Click New to add a Customer Satisfaction record. If an existing Customer Satisfaction record must be modified, click Edit from the **Action Button** next to the record that is to be modified.



## ➤ Step 3: Create Customer Satisfaction or Modify Customer Satisfaction

Complete all necessary fields, and click the Save to return to the *Customer Satisfaction* page, or click Save & New to create additional Customer Satisfaction records.

**Create Customer Satisfaction:** \*

**Details**

Type of Respondent \*

Year \*  Month \*

**Ratings**

Number That Responded with a Rating of 1 \*

Number That Responded with a Rating of 2 \*

Number That Responded with a Rating of 3 \*

Number That Responded with a Rating of 4 \*

Number That Responded with a Rating of 5 \*


**Comments**

**Save Save & New Cancel**



## 5.3.2 Add/Modify Participation Data

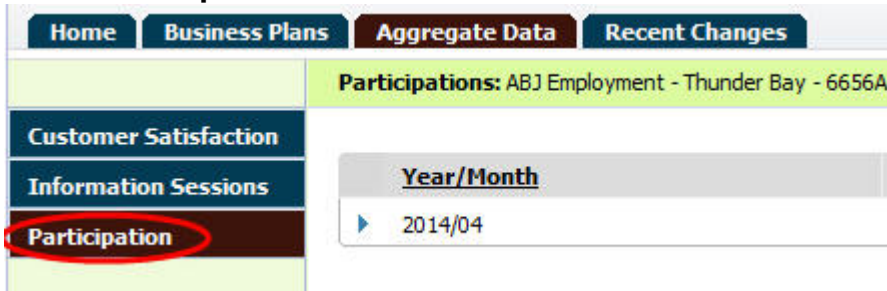
For Employment Service and Literacy and Basic Skills:

	Only one Participation record can be captured at a service delivery site per month for each program.
---	--

### System Steps

#### ➤ Step 1: *Aggregate Data*

Select **Participation** in the Tab Content Bar.



Home Business Plans **Aggregate Data** Recent Changes

Participations: ABJ Employment - Thunder Bay - 6656A

Customer Satisfaction  
Information Sessions  
**Participation**

Year/Month  
▶ 2014/04

#### ➤ Step 2: *Participation*

Click New to add Participation data for the service delivery site. If an existing Participation record must be modified, click Edit from the **Action Button** next to the record that is to be modified.



Aggregate Data Recent Changes

Participations: ABJ Employment - Thunder Bay - 6656A

Year/Month	Number of Individuals Participating	Number of Employers Participating	Last Updated	Action
▶ 2014/04	15	2	26/6/2014 16:02	 

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## ➔ Step 3: Create Participation or Modify Participation

Complete all necessary fields, and click Save.

**Create Participation:** ✕

\* required field

---

**Details** ▼

<b>Year *</b>	<input type="text"/>	<b>Month *</b>	<input type="text"/>
<b>Number of Individuals Participating *</b>	<input type="text" value="0"/>	<b>Number of Employers Participating *</b>	<input type="text" value="0"/>

**Comments** ▼

**Save** **Cancel**

## 5.3.3 Add Information Sessions Data

For Employment Service, Summer Jobs Service, Literacy and Basic Skills, and Ontario Self-Employment Benefit Program:

### System Steps

#### ➤ **Step 1:** *Aggregate Data*

Select **Information Sessions** in the Tab Content Bar.

The screenshot shows the 'Aggregate Data' tab selected in the top navigation bar. Below the navigation bar, the page title is 'Information Session: ABJ Employment - Thunder Bay - 6656A'. On the left sidebar, the 'Information Sessions' tab is highlighted with a red circle. The main content area displays the text 'Please enter a date range for the information sessions.' followed by a 'From Date' input field with an asterisk and a calendar icon. A 'Search' button is located to the right of the input field. Below this, there is a 'Search Results' section with a table header containing 'From Date', 'To Date', and 'Type of Information Session'.

#### ➤ **Step 2:** *Information Session*

Click New to add an Information Session record for the service delivery site.

This screenshot shows the same interface as the previous one, but with the 'New' button in the top right corner of the main content area circled in red. The 'New' button is labeled 'New' and has a small icon next to it. Below the 'New' button, the text 'Please enter a date range for the information sessions.' is visible, followed by 'From Date' and 'To Date' input fields with asterisks and calendar icons. 'Search' and 'Reset' buttons are located below the input fields.

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## Step 3: Create Information Session

Complete all necessary fields, and click Save to return to the *Information Session* page, or click Save & New to create additional Information Session records.

**Create Information Session:** x

\* required field

**Information Session** ▼

**Type of Information Session \***

**Description \***


**Details** ▼


**Audience \***  **Number of Attendees \***

**From Date \***  **To Date \***

**Comments** ▼

**Save** **Save & New** **Cancel**

	The <b>Description</b> should contain the name and a brief description of the Information Session.
---	--

	<b>To Date</b> must be a date before or equal to the LBS service end date. Otherwise, an error message will be displayed.
---	---

## 5.3.4 View/Modify Information Sessions Data

For Employment Service, Summer Jobs Service, Literacy and Basic Skills, and Ontario Self-Employment Benefit Program:

### System Steps

#### ➤ **Step 1: Aggregate Data**

Select **Information Sessions** in the Tab Content Bar.

The screenshot shows the top navigation bar with tabs: Home, Business Plans, **Aggregate Data**, and Recent Changes. Below the tabs, the page title is "Information Session: ABJ Employment - Thunder Bay - 6656A". On the left sidebar, the menu items are Customer Satisfaction, **Information Sessions** (circled in red), and Participation. The main content area contains the text "Please enter a date range for the information sessions." followed by a "From Date" input field with an asterisk, a calendar icon, and a "Search" button. Below this is a "Search Results" section with a table header containing "From Date", "To Date", and "Type of Information Session".

#### ➤ **Step 2: Information Session**

To view or modify an Information Session, enter a date range and click Search.

This screenshot shows a closer view of the search interface. At the top, it says "Information Session: ABJ Employment - Thunder Bay - 6656A" with "New" and "Refresh" icons. Below is the instruction "Please enter a date range for the information sessions." followed by "From Date" and "To Date" input fields, both with asterisks and calendar icons. A "Search" button (circled in red) and a "Reset" button are positioned below the input fields. The "Search Results" section is expanded to show a table with the following headers: "From Date", "To Date", "Type of Information Session", "Audience", "Number of Attendees", and "Status".

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## ➤ Step 3: Information Session

To view, expand the toggle. To modify, select Edit from the **Action Button**.

Search Results (Number of Items: 1 out of 1)

From Date	To Date	Type of Information Session	Audience	Number of Attendees	Status	Action
26/6/2014	26/6/2014	Job fair	General public	40	Active	

## ➤ Step 4: Modify Information Session

Modify the necessary information, and click Save.

**Modify Information Session:** \*

**Information Session**

Type of Information Session \*

Description \*


**Details**

Audience \*  Number of Attendees \*

From Date \*  To Date \*

Comments

**Save** **Cancel**

	<p><b>To Date</b> must be a date before or equal to the program service end date. Otherwise, an error message will be displayed.</p>
---	--

## 5.3.5 Add/Modify Wait List Data

### For Literacy and Basic Skills ONLY:

#### System Steps

##### ➤ Step 1: *Aggregate Data*

Select **Wait List** in the Tab Content Bar.



##### ➤ Step 2: *Wait List*

Click New to add Wait List data for the service delivery site. If an existing Aggregate Wait List record must be modified, click Edit from the **Action Button** next to the record that is to be modified.



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### ➔ Step 3: Create Wait List/Modify Wait List

Complete all necessary fields, and click Save to return to the *Wait List* page, or click Save & New to create additional Wait List records.

Create Wait List: ABJ Employment - Dundas - 6656B ✕

\* required field

**Details** ▼

**Year** \*  **Month** \*

**# Individuals on the Wait List** \*

**Comments** ▼




**Year** and **Month** must be before or equal to the LBS service end date. Otherwise, an error message will be displayed.



## 5.3.6 Add/Modify Aggregate Data

For Ontario Self-Employment Benefit Program ONLY:

	Only one aggregate data record can be captured at a service delivery site per month.
---	--

### System Steps

#### ➤ Step 1: Aggregate Data

Select **Aggregate Data** in the Tab Content Bar.



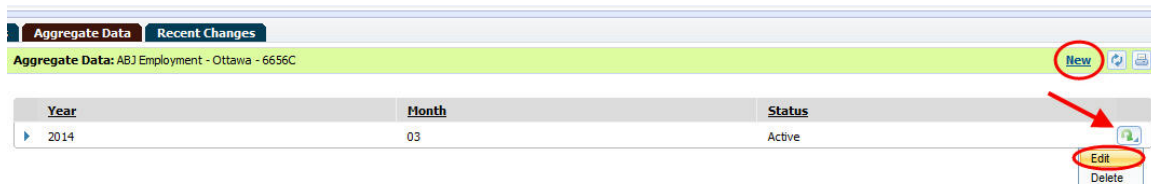
<a href="#">Home</a>	<a href="#">Business Plans</a>	<b><a href="#">Aggregate Data</a></b>	<a href="#">Recent Changes</a>
----------------------	--------------------------------	---------------------------------------	--------------------------------

Aggregate Data: ABJ Employment - Ottawa - 6656C

Year
▶ 2014

#### ➤ Step 2: Aggregate Data

Click New to add aggregate data for the service delivery site. If an existing aggregate data record must be modified, click Edit from the **Action Button** next to the record that is to be modified.



<a href="#">Aggregate Data</a>	<a href="#">Recent Changes</a>
--------------------------------	--------------------------------

Aggregate Data: ABJ Employment - Ottawa - 6656C

Year	Month	Status	Action
▶ 2014	03	Active	<a href="#">New</a> <a href="#">Edit</a> <a href="#">Delete</a>

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## ➔ Step 3: Create Aggregate Data/Modify Aggregate Data

Complete all necessary fields, and click Save to return to the *Aggregate Data* page.

Create Aggregate Data: ABJ Employment - Ottawa - 6656C \* required field

Details

Year \*  Month \*

Number of individuals who applied for the program \*  Number of Applicants whose Business Concepts have been assessed \*

Number of applicants who have been recommended for OSEB \*  Number of Participants who completed a Business Plan \*

Number of Participants who implemented a Business Plan \*

Comments

**Save** **Cancel**

## 5.4 Deleting Information Session Data

For Employment Service, Summer Jobs Service, Literacy and Basic Skills, and Ontario Self-Employment Benefit Program:



In cases where information session data has been entered in error, this data can be deleted.

### System Steps

#### ➤ Step 1: *Aggregate Data*

Select **Information Sessions** in the Tab Content Bar.

Home Business Plans **Aggregate Data** Recent Changes

Information Session: ABJ Employment - Thunder Bay - 6656A

Customer Satisfaction

**Information Sessions**

Participation

Please enter a date range for the information sessions.

From Date \*

Search

Search Results

From Date	To Date	Type of Information Session
-----------	---------	-----------------------------

#### ➤ Step 2: *Information Session*

To view or modify an Information Session, enter a date range and click Search.

Information Session: ABJ Employment - Thunder Bay - 6656A New Print Refresh

\* required field

Please enter a date range for the information sessions.

From Date \*  To Date \*

Search Reset

Search Results




From Date	To Date	Type of Information Session	Audience	Number of Attendees	Status
-----------	---------	-----------------------------	----------	---------------------	--------

# EOIS Case Management System Service Provider User Guide

## ➤ Step 3: Aggregate Session

Click Edit from the **Action Button** next to the relevant information session.

Search Results (Number of Items: 2 out of 2)

From Date	To Date	Type of Information Session	Audience	Number of Attendees	Status	
2/7/2014	2/7/2014	OSEB Orientation	General public	15	Active	
2/7/2014	2/7/2014	OSEB Orientation	General public	0	Cancelled	 

## ➤ Step 4: Modify Information Session

Ensure that **Number of Attendees** is set to 0, and click Save.

Modifier une séance d'information: ABJ Employment - Ottawa - 6656C \* champ obligatoire

**Séance d'information**

**Description \*** General Public Info

**Détails**

**Auditoire \*** Grand public **Nombre d'assistants \*** 0

**Date de début \*** 2/7/2014 **Date de fin \*** 2/7/2014



**Remarques**

**Sauvegarder** **Annuler**

## ➤ Step 5: Information Session

From the **Action Button**, click Delete next to the relevant information session.

Search Results (Number of Items: 2 out of 2)

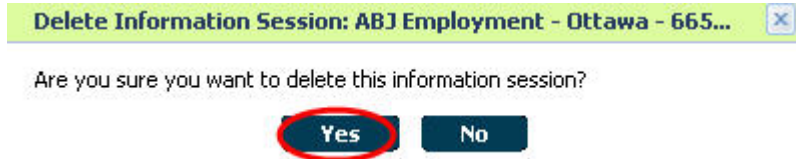
From Date	To Date	Type of Information Session	Audience	Number of Attendees	Status	
2/7/2014	2/7/2014	OSEB Orientation	General public	15	Active	
2/7/2014	2/7/2014	OSEB Orientation	General public	0	Cancelled	 

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## ➤ Step 6: Delete Information Session

Click Yes to confirm deletion.



## ➤ Step 7: Information Session

The information session still appears on this page, but its status is set to “Canceled.”

Search Results (Number of Items: 2 out of 2)

From Date	To Date	Type of Information Session	Audience	Number of Attendees	Status
2/7/2014	2/7/2014	OSEB Orientation	General public	0	Canceled
2/7/2014	2/7/2014	OSEB Orientation	General public	0	Canceled