Ministry of Training, Colleges and Universities



EOIS-APPR

User Manual for School Boards

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CHAPTER 1

Introduction to the EOIS-APPR User Manual for School Boards

Purpose

The purpose of this User Manual for School boards is to describe how ministry apprenticeship business is performed using the Employment Ontario Information System-Apprenticeship (EOIS-APPR).

As system related procedures are updated, the version number and the issue date will also be updated to reflect the current version.

Note: There is a security feature in the EOIS-APPR that will automatically time the system out if there is no activity for 15 minutes.

Scope

It is important to note that your access will allow you to view and utilize specific system functionality within 2 distinct records:

- School Board Record
- Client Record

Within each Record there are multiple sections (or tabs).

Note: The Client record is a complete profile for one individual client. The Client tab within the School Board record displays all clients associated with your board.

The following procedures are described in this manual:

- Applying an OYAP student as a program participant
- Adding a training agreement
- Printing the training agreement
- Viewing information related to the OYAP client's record
- Creating a client list
- Maintaining School Board information (e.g., addresses, contact information)
- Viewing Service Provider Representative, Service Provider Registration Authority and Service Provider Subscriber information
- Adding a Service Provider Subscriber

How to use this manual

Each chapter has an Overview section that includes "When to use" that describes the purpose of each procedure.

Each procedure includes:



- How to use the procedure, including information to consider before proceeding further
- Inputs to the procedure if applicable
- Who can perform the actions
- Steps and page actions required to perform the procedure.

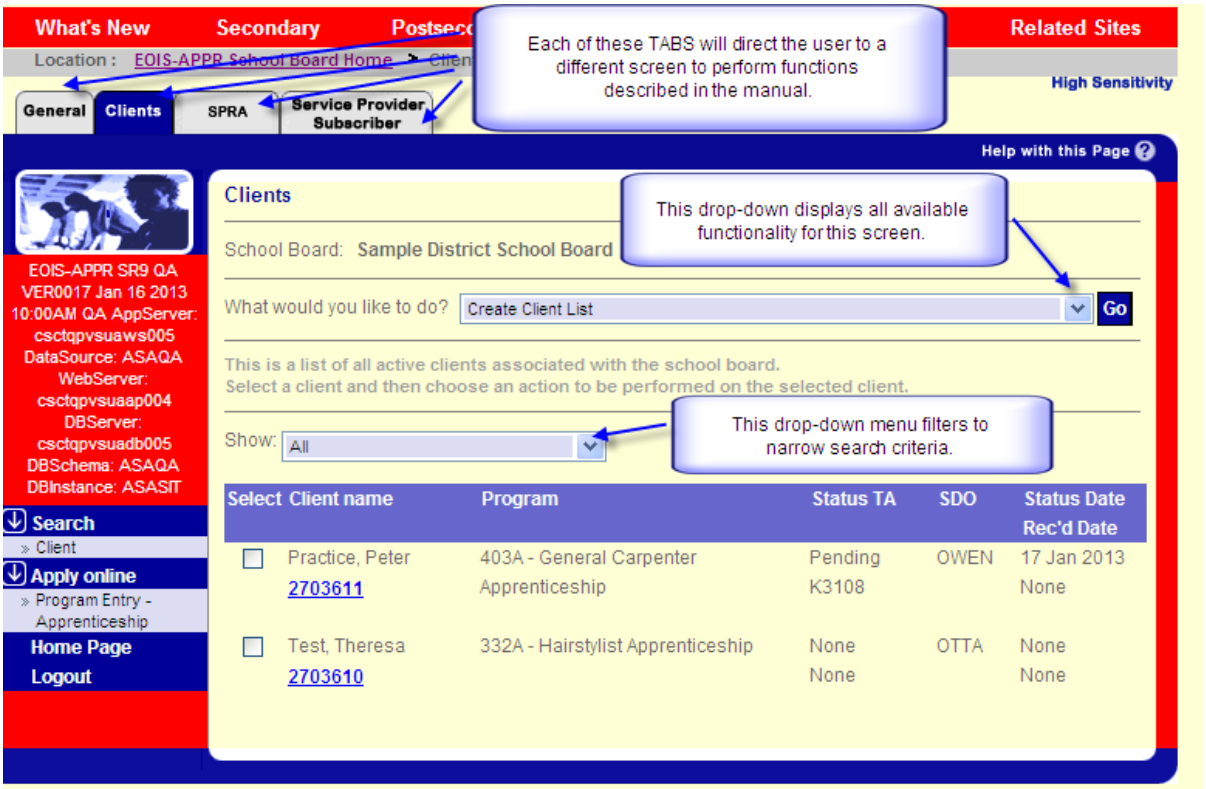
If you need help…

For help in using the EOIS-APPR system, you can refer to:

- **Online Help**
  On each page, you can click **Help with this page?**

- **ONe-key access to EOIS-APPR Help**:
  Please refer to the ONe-key User Guide. If a solution is not available, please contact your local Service Delivery office for assistance.

This is a typical screen from the EOIS-APPR system:



CHAPTER 2

Applying an OYAP Client to an Apprenticeship Program

When to use

Use this procedure to apply and approve a new client to an Apprenticeship program.
A client is first added as a program participant. If the client will be registered as an apprentice, a training agreement is then added.



Note: Information regarding OYAP clients who are program participants **only** will not be transferred to the Ontario College of Trades (OCOT). However, if a training agreement is also added and registered by MTCU, the OYAP client's information will be transferred to OCOT. Clients who are active OYAP participants are not required to pay an OCOT membership fee.

Note: Since you will be entering the application on behalf of someone else (the client), you must obtain a signature on the hard copy of the application form for this personal information to be legally entered into the EOIS-APPR.

Inputs

- Signed Application for Ontario Youth Apprenticeship Program.
- Client's documents to verify identity and education:
    - OEN
    - Social Insurance Number
    - Proof of education
    - Proof of age

2.1 Applying a Client to be a Program Participant

Step	Action
1	From the Home page, select link Apply: OYAP client to an Apprenticeship program.
2	On the *Choose a trade/occupation* page, you can select the Trade in which the client is participating by using one of two methods: • From the first drop-down menu in **Option A**, you can choose the sector. The second drop-down menu then changes to reflect only those trades that fall within that sector. This option is useful if there is a Trade missing from the application form or you do not know the specific trade code. • **Option B** allows you to enter the Trade code directly (e.g., 309A) if you know it. The special program version will default to "Special Program – Ontario Youth Apprenticeship Program". Click [**Next Step**].
3 	The *OYAP Student Identification* page requires data entry of: • Ontario Education Number (mandatory field) • Social insurance number (optional field) • Client last name (mandatory field) Click [**Next Step**]. **Note: If an exact client match is found in the EOIS-APPR two things can happen:** 1) If the client is participating in a different trade, you can proceed and data will be pre-populated on the Personal Information screen – which is next in this process OR 2) You cannot proceed and intervention from the local service delivery office will be necessary. You will see an error message "This client has a record of participating in this program" **See Appendix A & B for *Logic Trees* detailing client search scenarios for both OEN and SIN.**

Step	Action
4	On the top of the *Personal Information* page, there is a note that indicates: "No information is saved until the application is submitted at the end of the process". If there is inactivity on the system for more than 15 minutes, the system times out. The information you entered will be lost. Enter the following: • **Name and other personal information:** The applicant's first name and last name will appear on all documents produced by the Ministry. The middle name and preferred first name do not; they are optional fields. The *preferred first name* field is used if you want to include a name by which the client is known. For example, you might have a client whose legal first name is Robert, but goes by the name Bob. • **Date of birth** • **Social Insurance Number** (optional) • **Gender** • **Education Level:** Select the appropriate education level. • **Phone numbers:** You can enter up to 3 phone numbers for each client. From the drop-down menu, you can select which type of phone number you are entering (e.g., Bus., Cell, Home). • **E-mail address:** Enter if available. • **Name of School:** Enter the High School Name. • **Preferred language:** If the language preference is English, then all information that is mailed by the ministry to the client will be in English. Only training agreements are generated in the language in which you are working in the EOIS-APPR. For example, if you are working in the EOIS-APPR in French, the training agreement will be produced in French. • **Language section:** Enter if available • **Self-Identity / Designated Group:** The collection of self-identification data is completely voluntary. Enter this information if it is completed on the OYAP program participant application form. This information is used for policy analysis and statistical purposes. • **Residency Status:** Enter if available. • **Employment Insurance Status:** Enter if available. • **Mailing Address:** **Postal code:** The default **Country** is Canada. Enter a postal code and click [**Look up Address**]. You are brought to the Postal Code Look-up screen — a Canada Post interface. This will display the street that corresponds to the postal code that you entered. You need to specify the street number, apartment or unit, as appropriate. • The **Additional information** field can contain any notes that are required to ensure that correspondence is delivered correctly. This

Step	Action
	information will appear in the bottom left corner of the mailing label. Click [**Next Step**].
5	The *Required Documents* that have been supplied by the applicant to prove their entry requirements must be checked off. Select one of each of the required documents from each set. This will set the status of these documents to "Confirmed" on the client's Documents tab. Click [**Next Step**].
6	The *Confirm Application* page allows you to take the time to confirm the information you entered on the application before submitting. Once you are satisfied that all the information is correct, click [**Submit as approved**]. Result: The Client's Program Participation status is set to "Active".
7 	The *Application Summary* displays all client information and now also displays a system generated Client ID number. This ID number is hyperlinked directly to the client record. **Note: The bottom of this page includes a Button which allows the user to *Add a Training Agreement f*or the client. This button will be selected if the training agreement is to be added at this time.**

2.2 Search for A Sponsor

When to use

Use this procedure to search for the sponsor when adding a Training Agreement.

Note: This search functionality has been addressed in a separate section to assist the user in determining the most accurate way to find an existing sponsor in EOIS-APPR.

There are several ways of searching depending on the information you have on file for the sponsor.



For your search to be successful, you must enter at least one of the following criteria:

- **Sponsor name** - You can use a wild card to help you refine your search. For example, if you enter *Smith** then all sponsors with this text at the beginning of their name will be found (e.g., *Smith's Carpentry*, *Smithson Welding*).
- **Sponsor** - Enter the sponsor's unique ID number in full. This number is automatically assigned to the sponsor by the system when the sponsor is added. The match must be exact.
- **Postal code** - Enter the exact and complete postal code. This field is not case-sensitive, nor does it matter whether you include the space between the two groups of characters.
- **Contact name** - Enter the name of the contact for the sponsor. You can use a wild card to help refine your search (e.g., *smi** will return *Smith, Smits*, etc.).
- **Contact phone number** - Enter the phone number of the contact for the sponsor. Area code can be entered as a separate field.
- **Trade** – Enter the Trade code (e.g., 309A). It must be complete and exact.

Inputs

Signed Application for Ontario Youth Apprenticeship Program.

Step	Action
1	Select **Search for a Sponsor** on the Add a Training Agreement page.
2	Searching a Sponsor by a unique identifier will return accurate results. The criteria that will return the most specific search results are **Sponsor ID** and **phone number**. If you do not find the sponsor by entering information in one field, enter information in the other fields to assist you in your search. Enter at least one of the following: • Sponsor ID # if known. (This is a 7 digit number and is the most efficient way to search as it will return an exact match). • Contact phone number with area code. • Sponsor name with a Wildcard*. You may also want to add the Trade code the client is participating in, to limit the search results. i.e. Sponsor name: Family* Trade: 310S This will return all sponsors approved to deliver the trade of Automotive Service Technician in Ontario with a company name that starts with Family. • Postal Code of the sponsor. • Contact name at the company can also return results if you are unsure of the accurate company name and spelling and spacing.
	**Note: Some companies are known by one name but the legal name is different.** For example, Canadian Tire might be legally called Joe Smith Ltd. If you have registered apprentices with the same company in previous years, you may know the legal company name where the student is working. Using wildcards in the search criteria may be helpful as the sponsor name may be entered in the system in a variety of ways. i.e. B. R. Mechanical if entered as B.R. Mechanical will not return a result. When you search a sponsor, you may get the following result: "No sponsor(s) matched your search criteria" or you may get a list of sponsors that match some of the search criteria but are not what you were looking for.

Step	Action
	This can mean: • The sponsor does not exist in our data base. • The sponsor name you have entered does not match the sponsor name we have on record. If this is the case, contact the local Service Delivery office to request assistance.

2.3 Adding a Training Agreement from the Application Summary Page

Training Agreement (Competency-Based):

Step	Action
1	On the Application Summary page select the button: ***Add a New Training Agreement.***
2	On the *Add a New Competency-based Training Agreement* page: • Enter the **Client SIN** if it has not been pre-populated. • Click [**Search for a Sponsor**] to select the sponsor to which the client's training agreement will be associated. This opens the *Search Sponsor* page. (Section 2.2) Select the sponsor and click [**Return selected sponsor**]. • You are now back on the *Add a New Competency-based Training Agreement* page with all the information regarding the sponsor completed. • Enter the **Start Date of Employment.** • Click [**Save**]. (A) If your Board has print functionality, a PDF version of the document will display on your screen. Select Print and select the printer name. Three copies of the training agreement will be printed. (B) If your Board does not have print functionality, you will see the message "Update applied" at the top of the page. **<u>Result</u>: The status of the training agreement is set to "Pending" on the *Training Agreements* tab of the Client Record.**

Training agreement (Hours Based):

Step	Action
1	On the Application Summary page select the button: ***Add a Training Agreement.***
2 	On the *Add a New Hours-based Training Agreement* page: • Enter the **Client SIN** if it has not been pre-populated. • Click [**Search for a Sponsor**] to select the sponsor to which the client's training agreement will be associated. This opens the *Search Sponsor* page. (Section 2.2) Select the sponsor and click [**Return selected sponsor**]. • Enter the **Start Date of Employment** • Enter **Regular Hours Per Week** • Click [**Calculate**] **This is *very important* as the training agreement hours must be broken down into periods before you can save the information.** • Click [**Save**] (A) If your Board has print functionality, a PDF version of the document will display on your screen. Select Print and select the printer name. Three copies of the training agreement will be printed. B) If your Board does not have print functionality, you will see the message "Update applied" at the top of the page. Result: The status of the training agreement is set to "Pending" on the *Training Agreements* tab of the Client Record.

CHAPTER 3

Search Clients Associated with your Board

When to use



Use this procedure to search for a specific client. The client's information will return if the client has an active program participation status and is associated with the Board doing the search.

Once the client's record is returned, the user can view the following tabs for the client:

- General
- Program participation
- Training agreements
- Skills Tab
- Reportable subjects
- Documents

Who can use

- Provider Registration Authority
- Service Provider Subscriber

Step	Action
1	Log on to the EOIS – APPR via One-key.
2 	On your *Home* page, open the hyperlink **Search the client associated with your Board.** **Note: This search functionality is also available by using the Search Client link on the left navigation bar.**
3	On the Client Search page, you can return the client's record using any of the following parameters: • Client ID (when entered will return an exact match) • Ontario Education Number (OEN): (when entered will return an exact match) • Last name (allows for wildcard searches) • First name (allows for wildcard searches) • Date of birth (if used alone will return all clients associated with

Step	Action
	your board with this birth date) • Client Phone Number • TA # (when entered will return an exact match) • TA Status • TOSS: Trade code (if used alone will return all clients associated with your board with this Trade code) • OCOT Membership ID • OCOT Membership Status **Note: Client search functionality will return OYAP clients with an active program participation status for your Board.** Enter search criteria from above and select search.
4	Depending on the search criteria selected the results may display more than one record. Select the client ID hyperlink for the appropriate client to open the client record.

CHAPTER 4

Client Record

When to use

The client record contains all details of the client's program participation and apprenticeship registration, if applicable.

This chapter details the functionality available in each of the following tabs within the client record:



- General
- Program Participation
- Training Agreements
- Skills
- Schooling
- Reportable Subjects
- Documents

Note: Data that is entered into the EOIS-APPR will remain in the language in which it was entered even when toggling from English to French – French to English within the system.

Who can use

- Service Provider Registration Authority
- Service Provider Subscriber

4.1 General Tab

4.1.1 Update Mailing Address and Contact Information

When to use

Use this procedure to update a client's mailing address and contact information: e-mail address and phone numbers.

The client can have up to three phone numbers in their record (e.g., business, home, cellular).

Note: A new Apprenticeship Registration ID card will *not* be automatically issued when a client's address is updated. It is not required.

Inputs

Client request (phone, in person, letter, e-mail, fax)

Who can use

- Service Provider Registration Authority
- Service Provider Subscriber

Step	Action
1	From the Left Navigation Bar search for the client.
2	On the client's *General* tab, from the **What would you like to do?** drop-down menu, select the page action: "Update mailing address and contact information" and click [**Go**].
3	On the *Update Mailing Address and Contact Information* page, make the changes to the client's address, e-mail address or phone numbers. **To change address information:** The default **Country** is Canada. To change a Canadian address, enter the new postal code and click [**Look up Address**]. You are brought to the Postal Code Look-up screen — a Canada Post interface. This will display the street that corresponds to the postal code that you entered. You need to specify the street number, apartment or unit, as appropriate. The **Additional information** field can contain any notes that are required to ensure that correspondence is delivered correctly. This information will

Step	Action
	appear in the bottom left corner of the mailing label. **To change contact information:** Enter the changes to the e-mail address and phone numbers, if applicable. Click [**Save**].
4	Go back to the *General* tab. Note: You can view the detailed history of the client's address and name changes by clicking the **View history** link.

4.1.2 Update Personal Information

When to use

Use this procedure to update a client's personal information including:

- Preferred first name
- Date of birth
- Gender
- Preferred language (English or French)
- Education level

The **Preferred first name** field is used to record a name that may not be the client's legal name, but is how the client wants to be addressed when contacted.

Note: You will need to contact the Service Delivery office if the client's Last name or First name changes or if it was entered incorrectly.

Inputs

Client request (phone, in-person, letter, e-mail, fax)

Who can use

- Service Provider Registration Authority
- Service Provider Subscriber

Step	Action
1	From the Left Navigation Bar, search for the client.
2	On the client's *General* tab, from the **What would you like to do?** drop-down menu, select the page action: "Update personal information" and click [**Go**].
3	On the *Update Personal Information* page, make the applicable changes then click [**Save**].
4	Go back to the Client *General* tab, where you will see the changes reflected.

4.1.3 Add / Update Ontario Education Number (OEN)

When to use Use this procedure to add or update a client's Ontario Education Number (OEN) in one of the following circumstances:

- OEN was originally entered incorrectly.
- Client has a legacy record in the system and the OEN number was not previously captured.

Inputs Proof of OEN number

Who can use
- Service Provider Registration Authority
- Service Provider Subscriber

Step	Action
1	From the Left Navigation Bar, search for the client.
2	On the client's *General* tab, from the **What would you like to do?** drop-down menu, select the page action: "Add/Update OEN" and click [**Go**].
3	On the *Add/Update OEN* page, add or change the OEN then click [**Save**]. The message *Update Applied* is displayed at the top of the page.
4	Go back to the Client *General* tab. The OEN number will display beside the SIN number.

4.2 Program Participation Tab

4.2.1 View Program Participation Tab

When to use Use this procedure to view a client's program participation tab.

Inputs Signed Application for Ontario Youth Apprenticeship Program

Who can use
- Service Provider Registration Authority
- Service Provider Subscriber

Step	Action
1	From the Left Navigation Bar, search for the client**.**
2	Select the second tab from the left entitled *Program Participation* tab.
3	This page displays details of the program the client has been applied to. The OCOT membership class, if applicable, can be viewed on this tab.
4	There is a link entitled View Summary associated with application. This link will display the details of the application that was entered for the OYAP client.
5	There is a link entitled View School Board Change History. This link will display the history of the boards the client has been associated with. This screen could display as blank if the client is only associated with one Board.

4.2.2 Update Special Program Outcome for the Selected Program

When to use

Use this procedure when an active apprentice has completed or withdrawn from the OYAP program. The following instructions apply to an update for one client. To update Special Program outcome for several clients at one time refer to ***Section 5.2.3***

This Special program completion is just for the OYAP portion of a client's program participation and not the base Apprenticeship program. Once a client's OYAP outcome has been updated, the requirements to continue to participate in the base program will be enforced (i.e., ratio, wage periods for Hours-Based apprenticeship programs). At this point, the client's record will no longer be visible on the School Board Client tab.

Note: This page action will result in the removal of client's record from the School Board Client tab.

Inputs

- Client request – client no longer wishes to participate in the OYAP program
- Proof of completion of the OYAP program (proof of grade 12)

Who can use

- Service Provider Registration Authority
- Service Provider Subscriber

Step	Action
1	From the left navigation bar, search client.
2	Go to the client's *Program Participation* tab.
3	From the **What would you like to do?** drop-down menu, select the page action: "Update special program outcome for the selected program." Select the program you wish to update by using the select box and click [**Go**].
4	On the *Update Special Program Outcome* page, use the drop down menu to select Complete or Withdrawn. A mandatory date field will appear. **Date of Graduation** can be entered(optional field) Click **[Save]**
	The message "Information saved successfully" will appear at the top of the screen. Click *Program Participation* in the location bar to return to that

Step	Action
	tab.
5	On the Program Participation tab the outcome displays as follows: **OYAP**: Complete *or* Withdrawn The Status Date for this change will appear to the right. If **Date of Graduation** is entered the date will display **dd/mm/yyyy**.

4.2.3 Add a New Training Agreement for the Selected Program

When to use Use this procedure to add a new training agreement **if the client is an existing program participant**.

This will create a training agreement in the status of Pending.

Inputs Signed Application for Ontario Youth Apprenticeship Program

Who can use
- Service Provider Registration Authority
- Service Provider Subscriber

To add a new Competency-based Training Agreement:

Step	Action
1	From the Left Navigation Bar search for the client**.**
2	Go to the client's *Program Participation* tab, and select the program for which you want to add a training agreement.
3	From the **What would you like to do?** drop-down menu, select "Add a new training agreement for the selected program". Select the program and click [**Go**].
4	On the *Add a New Competency-based Training Agreement* page:

Step	Action
	• Enter the Client SIN number if it has not been pre-populated. • Click [**Search for a Sponsor**] to select the sponsor to which the client's training agreement will be associated. This opens the *Search Sponsor* page. (Section 2.2) Click [**Search**]. Select the sponsor and click [**Return selected sponsor**]. You are now back on the *Add a New Competency-based Training Agreement* page with the sponsor's information completed. Enter the **Start Date of Employment** Click [**Save**] (A) If your Board has print functionality, a PDF version of the document will display on your screen. Select Print and select the printer name. Three copies of the training agreement will be printed. **Note**: If the print function does not work once you select SAVE, you may be required to disable your system's pop-up blocker. Please contact your technical support group for assistance. Contact your local Service Delivery office to request the training agreement that did not print. (B) If your Board does not have print functionality, you will see the message "Update applied" at the top of the page. Result: The status of the training agreement is set to "Pending" on the *Agreements* tab.

To add a New Hours-Based Training Agreement:

Step	Action
1	From the home page, search for the **client.**
2	Go to the client's *Program Participation* tab, and select the program for which you want to add a training agreement.
3	From the **What would you like to do?** drop-down menu, select the page action: "Add a new training agreement for the selected program". Select the program and click [**Go**].

Step	Action
4	On the *Add a New Hours-based Training Agreement* page: • Enter the client's SIN number if it has not been pre-populated • Click [**Search for a Sponsor**] to select the sponsor to which the client's training agreement will be associated. This opens the *Search Sponsor* page. (Section 2.2) Click [**Search**]. Select the sponsor and click [**Return selected sponsor**]. • Enter the **Start Date of Employment** • Enter **Regular Hours Per Week** • Click [**Calculate**]. **This is *very important* as the training agreement hours must be broken down into Periods before you can save the information.** • Click [**Save**]. (A) If your Board has print functionality, a PDF version of the document will display on your screen. Select Print and select the printer name. Three copies of the training agreement will be printed. **Note**: If the print function does not work once you select SAVE, you may be required to disable your system's pop-up blocker. Please contact your technical support group for assistance. Contact your local Service Delivery office to request the training agreement that did not print. (B) If your Board does not have print functionality, you will see the message "Update applied" at the top of the page. Result: The status of the Training agreement is set to "Pending" on the *Agreements* tab.

4.2.4 Add / Update School Name

Step	Action
1	From the Left Navigation Bar search for the client**.**
2	Go to the client's *Program Participation* tab.
3	From the **What would you like to do?** drop-down menu, select the page action: "Add / Update School Name" and click [**Go**].
4	On the Add/Update screen type in the school name. Click Save. You will receive the message "Information saved successfully"
5	In the location bar at the top of the screen click on *Program Participation* to return to that tab. The name of school will be displayed directly below the name of the board.

4.3 Training Agreements Tab

4.3.1 View Training Agreement

When to use

Use this procedure to view the details of a training agreement after it has been added.

You can view the Sponsor *General* Tab by selecting the Sponsor hyperlink on this page.

To view the progress of a Training Agreement, select the hyperlinked status.

- Pending – Initial status set prior to approval
- Registered - Employment Training Consultant has approved the agreement.

Note: When the status of a Training Agreement is "registered" the name of the approving Training Consultant will appear on this page.

To view the details of a Training Agreement, you can follow the steps outlined below, or select the *Program Hours* link.

Inputs

Signed Application for Ontario Youth Apprenticeship Program

Who can use

- Service Provider Registration Authority
- Service Provider Subscriber

Step	Action
1	From the Left Navigation Bar search for the client.
2	Select the *Agreements* tab.
3	Identify the training agreement you wish to view in detail by selecting the check box.
4	From the **What would you like to do?** drop-down menu, select "View the selected training agreement. Click [**Go**].
5	This page displays details of the training agreement and sign off information if applicable. Select the links at the top of the page to return to the client's *Training Agreements* tab.

4.4 Skills Tab

4.4.1 View Skills

When to use Use this procedure to view the skills associated with the client's program participation.

Inputs Signed Application for Ontario Youth Apprenticeship Program

Step	Action
1	From the Left Navigation Bar search for the **client.**
2	Go to the client's S*kills* tab.
3	This page displays details of the skills associated with the program the client has been registered to. The skill sets associated with the skills can be viewed by selecting the expansion box to the left of each skill. If a Training Agreement has been added, this page will also display the name of the Sponsor.

4.5 Schooling Tab

4.5.1 View Schooling

When to use Use this procedure to view the Schooling associated with client's program participation.

Inputs Signed Application for Ontario Youth Apprenticeship Program

Step	Action
1	From the Left Navigation Bar search for the **client.**
2	Go to the client's *Schooling* tab.
3	This page displays details of the client's schooling preferences, *on hold date.* Schooling details will appear if the client has been scheduled to class. If the client has completed a level of classroom training, the results will display.

4.6 Reportable Subjects Tab

4.6.1 View Reportable Subjects

When to use Use this procedure to view the reportable subjects associated with client's program participation.

Inputs Signed Application for Ontario Youth Apprenticeship Program

Step	Action
1	From the Left Navigation Bar search for the **client.**
2	Go to the client's *Reportable Subjects* tab.
3	This page displays details of the reportable subjects associated with the program the client has been registered to. The reportable subjects are broken down into the number of levels required for the trade based on the curriculum standard. Reportable Subject Status: • Required • Exempt • Complete  **<u>Note:</u> The initial status of a reportable subject is "Required". This status would remain if the client was to attend a class and failed the subject.**

4.7 Documents Tab

4.7.1 View Documents

When to use Use this procedure to view the documents associated with the client's record.

Inputs Signed Application for Ontario Youth Apprenticeship Program

Step	Action
1	From the Left Navigation Bar, search for the **client.**
2	Go to the client's *Documents* tab.
3	This page displays the breakdown of the documents used to verify program entry and exit requirements for all programs the client is associated with. Document Status: • Required • Confirmed • Received

CHAPTER 5

School Board Record

When to use

The School Board record contains the board's access details to the EOIS-APPR, and a summary list of clients associated to the Board as program participants and registered apprentices.

This chapter details the functionality available in each of the following tabs within the School Board Record:

- General
- Clients
- SPRA (Service Provider Registration Authority)
- Service Provider Subscriber



Note: Keep in mind the *Clients* tab within the School Board record displays all clients associated with your board. If you are seeking information on a specific client, you will find those details in the Client record.

Who can use

- Service Provider Registration Authority (SPRA)
- Service Provider Subscriber

5.1 General Tab

5.1.1 Add a New Contact to School Board

When to use Use this procedure to add or update the contact information at the School board.

Who can use The Service Provider Registration Authority (SPRA)

Step	Action
1	Click the **Contact Information** link from the School Board Home Page. This will open the School Board *General* tab.
2	From the **What would you like to do?** drop-down menu, select “Add a new contact to the School Board” and click [**Go**].
3	On the *Add Contact* page, enter the contact information and click [**Save**].
4	Go back to the School Board *General* page. Under the *Contact Information* section you will see the new contact information.

5.1.2 Update the Selected Contact

When to use Use this procedure to add or update the contact information at the School board.

Who can use The Service Provider Registration Authority (SPRA)

Step	Action
1	Click the **Contact Information** link from the School Board Home Page. This will open the School Board *General* tab.

Step	Action
2	Select the appropriate contact name in the *Contact Information* section by clicking the check box next to the name.
3	From the **What would you like to do?** drop-down menu, select "Update the selected contact" and click [**Go**].
3	On the *Update Contact* page, update the appropriate contact information. Click [**Save**].
4	Go back to the School Board *General* page. Under the *Contact Information* section, you will see the updated contact information.

5.1.3 Update the School Board Address

When to use Use this procedure to update the physical location and mailing address for the School board

Who can use Service Provider Registration Authority (SPRA)

Step	Action
1	From the **What would you like to do?** drop-down menu, select "Update the School Board address" and click [**Go**].
2	On the *Update School Board Address* page, you can update the School Board physical location and mailing address. For each address enter the appropriate postal code and click [**Look up Address**]. This will open the *Postal Code Look-up* application. Click [**Next**] once you have added the information, to return to the *Update School Board Address* page. Click [**Save**].
3	Go back to the School Board *General* page. Under the *Administrative Office* section, you will see the updated School Board address.

5.2 Clients Tab

5.2.1 View the Clients Associated with your Board

When to use

Use this procedure to view all clients associated with your board. This list displays the Client name, Client ID, Program, TA status, received in Service Delivery Office date, TA #, TA Status and the associated Service Delivery Office.
The Client ID is displayed below Client name. Selecting the Client ID link will take you directly to the individual Client Record.

Who can use

Service Provider Registration Authority (SPRA)
Service Provider Subscriber

5.2.2 Create Client List

When to use

Use this procedure to create a list of OYAP clients that appear on your *Client* tab.

The list will be created in excel format.

Note: If there is no client information to display based on the timing of the request, a message will display that indicates "There are no OYAP clients associated with your Board."

Who can use

Service Provider Registration Authority (SPRA)
Service Provider Subscriber

Step	Action
1	On the *Home* page, click **View the clients associated with your board**.
2	On your client tab, From the **What would you like to do?** drop-down menu, select "Create client list" and click [**Go**]. Note: Depending on the size of the file, this process can take a few minutes to complete.

Step	Action
3	A pop-up window will appear entitled “File Download”. You have the choice to **Open** or **Save** this file.
4	If you chose to save the file, you will be required to select a location where it is to be saved and click “**SAVE**”.
5	Once the file has been saved, a pop-up window will appear which indicates “Download Complete”. You have the following three choices: **Open, Open folder**, or **Close**.

5.2.3 Update Special Program Outcome

When to use

Use this procedure to update the outcome of multiple clients’ participation in the OYAP Special program. This update to complete or withdraw is used to conveniently update several client records at one time, but may be used to update an individual client record.
Note: If you wish to update only one program for a client complete this action from within the client record.



The same update (Withdraw or Complete), and Graduation Date will be applied to **all** clients selected.

Note: This page action will result in the removal of clients’ records from the School Board Client tab.

Inputs

- Client request
- Proof of completion of the OYAP program (e.g., proof of grade 12)

Step	Action
1	From the Home Page select **View the Clients Associated with your Board**. This will take you to the *Client* tab of your School Board record.

Step	Action
2	Select the clients or client that you wish to *complete* or *withdraw* by clicking in the box to the left of their name.
3	From the **What would you like to do?** Menu select: "Update special program outcome for the selected client(s)" and click [**Go**].
4	On the *Update Special Program Outcome* page, use the drop down menu to select Complete or Withdrawn. A mandatory date field will appear. Date of Graduation can be entered(optional field) Click [Save] The message "Information saved successfully" will appear at the top of the screen. Click *Program Participation* in the location bar to return to that tab.
5	On the *Program Participation* tab the outcome displays as follows: **OYAP**: Complete or Withdrawn The Status Date for this change will appear to the right. If Date of Graduation is entered the date will display dd/mm/yyyy.

5.3 Service Provider Registration Authority (SPRA) Tab

5.3.1 View the SPRA

When to use

The SPRA tab will have **view only** functionality, displaying details about the Service Provider Representative and the Service Provider Registration Authorities. The School Board will only have one active Service Provider Representative, although there can be multiple SPRAs. Maintenance of these records is restricted to the Service Delivery Office Manager role.

The **Service Provider Representative** is the individual authorized by the School Board (Service Provider) to approve the SPRA. The representative has the authority to bind the Service Provider to the SPRA Terms and Conditions as specified on the registration application. The Service Provider Representative is identified on the SPRA registration application.

The **Service Provider Registration Authority (SPRA)** is the individual authorized by the Service Delivery office Local Registration Authority to set-up access for Service Provider Subscribers as set out in the School Board contract with the Ministry of Training, Colleges & Universities and in accordance with the terms and conditions specified on the SPRA Registration application.

Upon receipt of the SPRA Registration application, the Service Provider Representative and Service Provider Registration Authority records are created in the EOIS-APPR by the Service Delivery Office manager. This will initiate two emails to the SPRA identifying access codes to the EOIS-APPR. These emails, received 48 hours apart are to be maintained in a confidential and secure manner.

Note: The SPRA status will be set to inactive if the user has not logged into the EOIS-APPR for 120 days.

Who can use

Service Provider Registration Authority (SPRA) **View Only**
Service Provider Subscriber **View Only**

5.4 Service Provider Subscriber Tab

5.4.1 View the Service Provider Subscriber

When to use

The Service Provider Subscriber tab will display details about the Service Provider Registration Authority (SPRA), and the Service Provider Subscribers. There may be multiple Subscribers and maintenance of these records is restricted to the SPRA role.

The **Service Provider Registration Authority (SPRA)** is the individual authorized by the Service Delivery office Local Registration Authority to set-up access for Service Provider Subscribers as set out in the School Board contract with the Ministry of Training, Colleges & Universities and in accordance with the terms and conditions specified on the SPRA Registration application.

The **Service Provider Subscriber** is the individual(s) authorized by the SPRA to access the EOIS-APPR as set out in the School Board contract with the Ministry of Training, Colleges & Universities and in accordance with the terms and conditions specified on the Service Provider Subscriber Registration form.

Upon receipt of the Service Provider Subscriber Registration form, the Service Provider Subscriber record is created in the EOIS-APPR by the SPRA. This will initiate two emails to the Subscriber identifying access codes to the EOIS-APPR. These emails, received 48 hours apart are to be maintained in a confidential and secure manner.

Note: The Service Provider Subscriber status will be set to inactive if the user has not logged into the EOIS-APPR for 120 days.

The following page actions on this tab can be accessed by the SPRA. The Subscriber has view only functionality.

- Add a new Service Provider Subscriber
- Inactivate the selected Service Provider Subscriber
- Activate the selected Service Provider Subscriber
- Reset PIN for the selected Service Provider Subscriber
- Update contact information for the selected Service Provider Subscriber

Inputs
- Service Provider Subscriber EOIS-APPR Registration form
- Service Provider Subscriber Administration form EOIS-APPR

Who can use Service Provider Registration Authority (SPRA)

5.4.2 To add a new Service Provider Subscriber:

Note: If an existing Subscriber has a name change, this is processed as a new Subscriber. All business processes must occur, including the completion of a new Service Provider Subscriber Registration form. The existing Service Provider Subscriber account must also be inactivated. (Section 5.4.3)

Step	Action
1	From the Home page, select the link **Service Provider Subscriber** "View Individual(s) with Employment Ontario Information System – Apprenticeship log in privileges". This will take you to the Service Provider Subscriber tab.
2	From the **What would you like to do?** drop-down menu, select the page action: "Add a New Service Provider Subscriber" and click [**Go**]. Note: A Service Provider Registration Authority (SPRA) must display in order to add a Service Provider Subscriber.
3	Enter the Service Provider Subscriber's • First name • Last name • Phone number • E-mail address • Re-enter E-mail address Click [**Save**]. Note: Ensure the email address is accurate, as this is the address where the EOIS-APPR access codes will be sent.
4	Go back to the *Service Provider Subscriber* tab using the location bar. Result: The new Service Provider Subscriber will be displayed with a status of Active.

Step	Action
	Note: This action generates two emails to the Service Provider Subscriber identifying the EOIS - APPR Enrolment and Private Identification Numbers. Once received, (48 hour span between the two) the Service Provider Subscriber can log into EOIS – APPR.

5.4.3 Inactivate the Selected Service Provider Subscriber:

Note: The subscriber status is set to Inactive if the subscriber has not logged into EOIS-APPR for 120 days. The Subscriber will receive a warning notice via email at the 90 day mark advising that the PIN will be inactivated. Logging in will halt the process. Inactivation can also be achieved by following the steps below.

Step	Action
1	From the Home page, select the link **Service Provider Subscriber** "View Individual(s) with Employment Ontario Information System – Apprenticeship log in privileges". This will take you to the Service Provider Subscriber tab.
2	Select the check box beside the Subscriber you wish to inactivate and from the **What would you like to do?** In the drop-down menu, select the page action: "Inactivate the selected Service Provider Subscriber". Click [**Go**].
3	On the *Change Status* page, select the status reason for the inactivation. Add any notes that apply. Click [**Save**].
4	The message *Update Applied* will display. Return to the *Service Provider Subscriber* tab using the location bar. Results: Status of the Service Provider Subscriber will now display as Inactive and their PIN is no longer valid.

5.4.4 Activate the Selected Service Provider Subscriber:

Step	Action
1	From the Home page, select the link **Service Provider Subscriber** "View Individual(s) with Employment Ontario Information System – Apprenticeship log in privileges". This will take you to the Service Provider Subscriber tab.
2	Select the check box beside the Subscriber you wish to activate and from the **What would you like to do?** drop-down menu select the page action: "Activate the selected Service Provider Subscriber." Note: Ensure the email address is accurate, as this activation will generate new system access codes. Click [**Go**].
3	On the *Change Status* page, add any notes that apply. Click [**Save**].
4	The message *Update Applied* will display. Return to the *Service Provider Subscriber* tab using the location bar. Results: Status of the Service Provider Subscriber will now display as Active. Note: The PIN will be automatically re-set and two emails will be created identifying the EOIS-APPR Enrolment and new Private Identification Numbers. Once received, (48 hour span between the two) the Service Provider Subscriber can log into EOIS–APPR.

5.4.5 Re-Set PIN for the Selected Service Provider Subscriber:

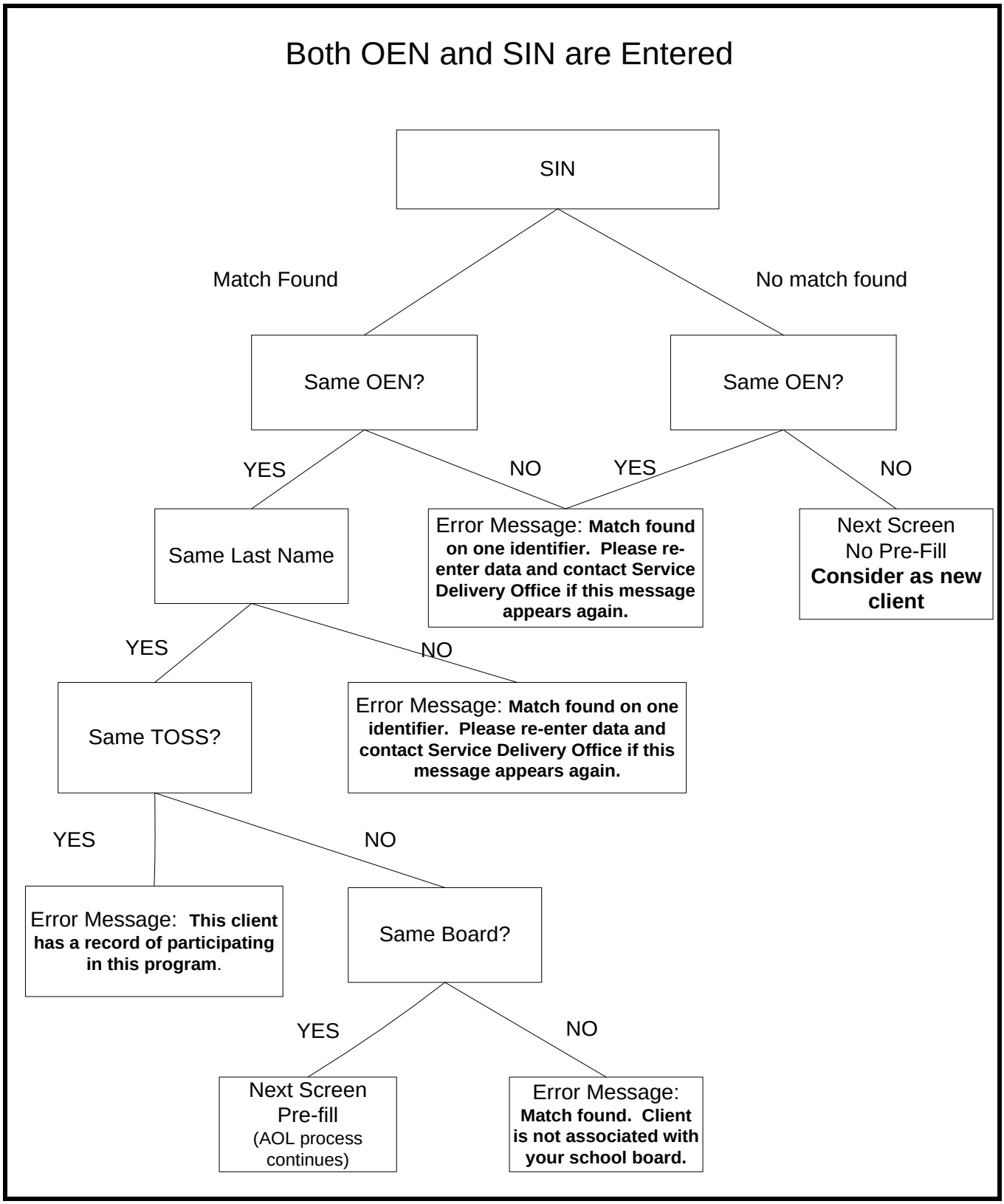
Step	Action
1	From the Home page, select the link **Service Provider Subscriber** "View Individual(s) with Employment Ontario Information System – Apprenticeship log in privileges". This will take you to the Service Provider Subscriber tab.

Step	Action
2	Select the check box beside the Subscriber that requires a PIN re-set and from the **What would you like to do?** drop-down menu, select the page action: "Re-set PIN for the Selected Service Provider Subscriber" Click [**Go**].
3	On the *Re-Set PIN for the Selected Service Provider Subscriber* page, the message: "Service Provider Subscriber PIN reset - email initiated" will appear. Result: The two emails will be created and sent to the Service Provider Subscriber within 48 hours. Once received, they can access the EOIS–APPR.
4	Return to the *Service Provider Subscriber* tab using the location bar.

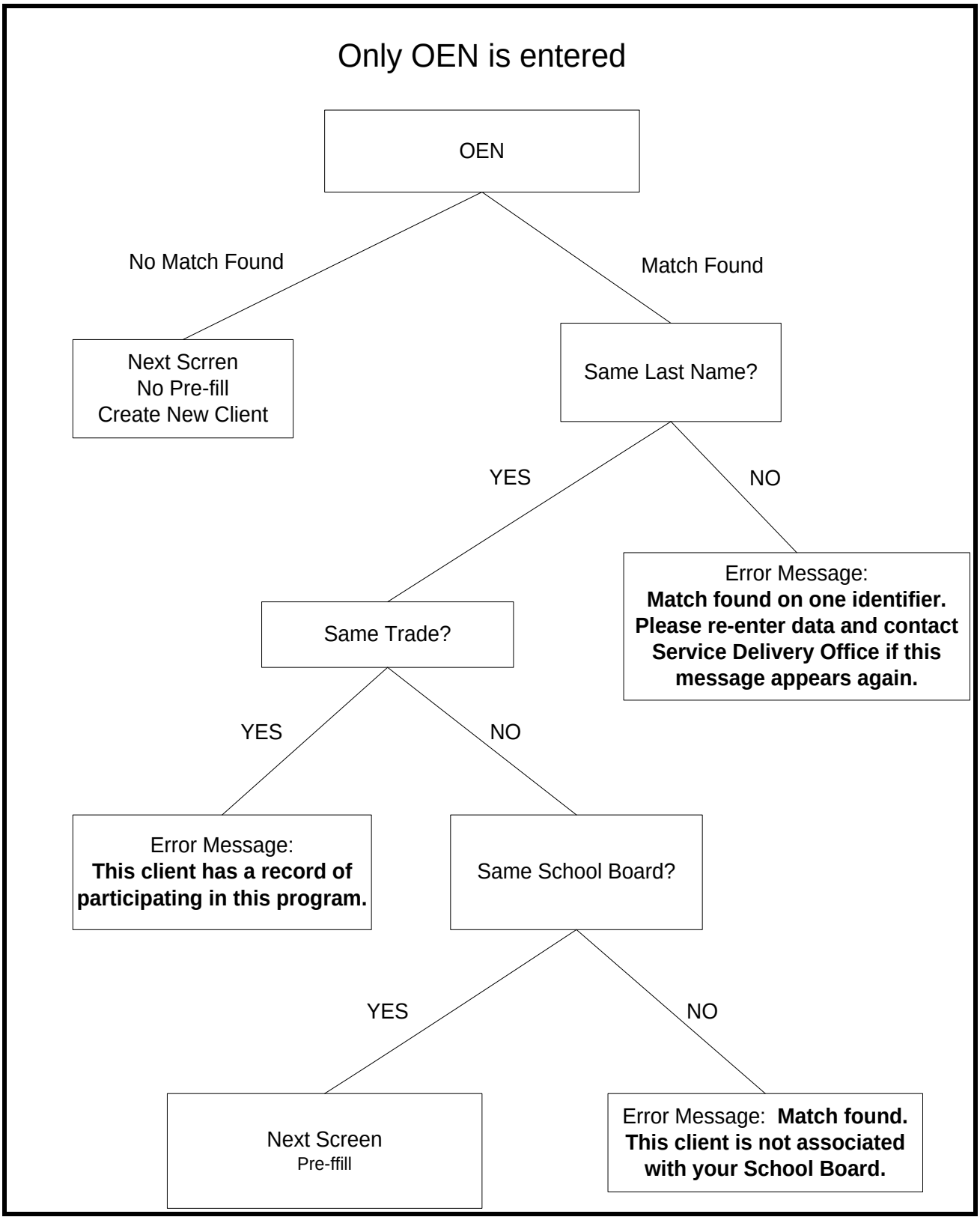
5.4.6 Update Contact Information for the Selected Service Provider Subscriber:

Step	Action
1	From the Home page, select the link **Service Provider Subscriber** "View Individual(s) with Employment Ontario Information System – Apprenticeship log in privileges". This will take you to the Service Provider Subscriber tab.
2	Select the check box beside the Subscriber you wish to update and from the **What would you like to do?** drop-down menu, select the page action: "Update contact information for the selected Service Provider Subscriber". Click [**Go**].
3	On the *Update Contact Information* page, update the telephone number or email address. Click [**Save**]. Note**:** *The School Board Subscriber name cannot be changed using this action.*
4	Return to the *Service Provider Subscriber* tab using the location bar.

Appendix A


Both OEN and SIN are Entered
SIN
Match Found
No match found
Same OEN?
Same OEN?
YES
NO
YES
NO
Same Last Name
Error Message: Match found on one identifier. Please re-enter data and contact Service Delivery Office if this message appears again.
Next Screen
No Pre-Fill
Consider as new client
YES
NO
Same TOSS?
Error Message: Match found on one identifier. Please re-enter data and contact Service Delivery Office if this message appears again.
YES
NO
Error Message: This client has a record of participating in this program.
Same Board?
YES
NO
Next Screen
Pre-fill
(AOL process continues)
Error Message:
Match found. Client is not associated with your school board.

Appendix B


Only OEN is entered
OEN
No Match Found
Match Found
Next Scrren
No Pre-fill
Create New Client
Same Last Name?
YES
NO
Same Trade?
Error Message:
Match found on one identifier. Please re-enter data and contact Service Delivery Office if this message appears again.
YES
NO
Error Message:
This client has a record of participating in this program.
Same School Board?
YES
NO
Next Screen
Pre-ffill
Error Message: Match found. This client is not associated with your School Board.