Ontario Employment Assistance Services (OEAS)
Client Reporting Template (CRT) Instructions
for agreements ending March 31, 2016

The Ministry of Training, Colleges, and Universities (MTCU) requires the submission of a Client Reporting Template (CRT) each quarter, as part of the ministry's agreement with Service Providers.

MTCU requires the reporting of personal participant and activity data to satisfy its requirement to report to the Government of Canada (GoC). Personal participant information includes data such as the client's name, SIN, address, and phone number.

- If your organization does not currently collect SIN level information to submit to MTCU, it is not required to do so now.
- If your organization did not complete the client's initial employment assessment you are required to share the outcome information with the service provider who did the initial assessment.

The OEAS CRT is to be accompanied by a scanned memorandum signed and dated by the appropriate authorized signing officer of the Service Provider certifying the report.

OEAS CRT REPORTING PACKAGE
The package contains three documents:

1) **OEAS Client Reporting Template Instructions for Service Providers** (this document)
   These instructions provide guidelines for data entry, data storage, a reporting schedule and method of submission of the OEAS CRT and signed memorandum.

2) **OEAS Client Reporting Template**
   The OEAS CRT is reported in Microsoft Excel format. The spreadsheet also has a tab called OEAS Data Definitions which contains the same information in the OEAS Data Definitions Document described below.

3) **OEAS CRT Data Definitions**
   The Data Definitions document lists each data field and provides the field description, the field format (i.e. drop down, text entry, numeric entry) and whether a field has a mandatory requirement to be completed (note: all items are mandatory). There is also a tab in the CRT spreadsheet containing the same information. Please consult either of these data definitions documents to **ensure data is entered correctly.**

OEAS REPORTING TEMPLATE INSTRUCTIONS

Data Entry

For 2015-16 please continue using the CRT you used in 2014-15. Before sending us the first quarter CRT for 2015-16, please update the existing document in the following way:

- Add the new 2015-16 OEAS Agreement Number to last year's OEAS Agreement Number under the "Service Provider Agreement Number" heading (example: old OEAS agreement number/new OEAS agreement number).
- Add/update outcomes for clients who have not yet completed the project,
- Enter new participant data as clients enter the project,

Each participant would normally have only one row in the spreadsheet with all data for that client entered on the same row in the appropriate field columns. The only **exception** to this rule is when a client has completed the program, and their file was closed, and they later returned for service. In this case a new "row" would be created since they are now considered a new client.

Send the latest version of the CRT each time you submit the CRT to MTCU. Data entry frequency can be determined by the delivery site however data should be as current as of the end of the reporting period for quarterly submission to MTCU.

Submission Tips

Please take note of the following tips for submission of the CRT:

- Save the CRT as a 2003 Excel (.xls) file so that we can import the data easily.
- Ensure that all data fields are completed accurately, especially the "action plan start date". This field is used to determine the fiscal year in which the client started the project.
- Each record must contain a SIN. If there is no SIN, the client will not count as an OEAS participant in our records to the GoC. They can still be included in the number of clients on the QADR however.
- **Do not** password protect the Excel spreadsheet. While it is important to protect the personal client information in the reports, it is only necessary to password protect the USB flash drive that the reports are submitted on. More information is provided below in the "data storage" and "data submission" sections. When the CRT files are password protected (and we do not have the password) it prevents MTCU from uploading data.
- The CRT should not be modified. As an example, some OEAS Service Providers have altered "SDS ID" field, which changes the client identifier for all entries. When records are customized for particular projects, it makes provincial analysis difficult.
- Enter the results of the intervention **12 weeks following participation in the project ONLY**. If you find out later (or earlier) than 12 weeks that the client is employed you may want to track that for your project records or for the QADR. Please **do not** update the CRT after the 12 week intervention result has been added.
- If a client returns to the project after completing the original intervention – that is the original action/employment service plan has been completed and a 12 week follow up

result has been entered – they should be added to the spreadsheet in a new row since they are now a new client.

- Ensure that each client record contains a start date.

Data Storage (Protection & Back-Up)

As personal information is being captured and stored, necessary care should be taken to ensure the security and integrity of individual participant data. Appropriate products, tools, measures and procedures to prevent the unauthorized or inadvertent collection, use, disclosure, loss, alteration or destruction must be used.

Access to personal information of individual participants should be limited to employees and subcontractors who need the personal information to deliver the program and ensure the compliance with its obligations under the OEAS Agreement.

Please refer to your OEAS Agreement for the terms and conditions of Access to Information and Protection of Privacy.

It is advisable to regularly backup two work copies of the data report file in case of file corruption.

Reporting Schedule

Data should be entered in the spreadsheet on a schedule that will allow timely submission of data to MTCU. The data should be as current as of the reporting period end date. The reporting schedule is as follows:

Reporting Period	File Name format	Reporting Deadline
Q1: April 1 - June 30, 2015	2015 04 01 – 2015 06 30	Friday, July 10, 2015
Q2: July 1 - September 30, 2015	2015 07 01 – 2015 09 30	Friday, October 9, 2015
Q3: Oct 1 - December 31, 2015	2015 10 01 – 2015 12 31	Friday, January 8, 2016
Q4: Jan 1 - March 31, 2016	2016 01 01 – 2016 03 31	Friday, April 8, 2016

Data Submission

The naming format for the Client Reporting Template and memorandum files **must** include the Service Delivery Site ID Number/Location which can be found on your OEAS Agreement and the corresponding reporting period date as noted in the above chart. A file name for a first quarter report from a service provider in London with the site ID of 1234A should appear like this:

<div align="center">1234A/London – 2015 04 01 – 2015 06 30</div>

The submission of the OEAS Client Reporting Template must be accompanied by a scanned memorandum signed and dated by the appropriate authorized signing officer for the Service Provider certifying the report.

The CRT and memorandum files are to be submitted to MTCU on a password protected USB flash drive.

The password protected USB flash drive containing your files should be couriered to the named MTCU local office contact as per your OEAS Agreement. The password should be sent to the same local office contact by e-mail. Alternatively, the password protected USB flash drive can be delivered personally to the MTCU local office contact.

The blank USB flash drive will be sent back to you in time for submission of the next quarterly report. Files previously saved on the flash drive will be deleted by MTCU.

Help and Support

Contact your MTCU local office contact for help and support.