EOIS-CaMS for Pre-App QUICK START GUIDE

USE THIS GUIDE WITH:

1. **Employment Ontario Information Systems (EOIS) - Case Management System (CaMS): Pre-Apprenticeship Service Provider User Guide**
2. **Participant Enrolment Form (PEF)**.

The **EOIS-CaMS Pre-Apprenticeship Service Provider User Guide** remains the primary reference for CaMS data-entry requirements.

Before You Start

- Use the signed Participant Enrollment Form (PEF) as the source for client information.
- EOIS-CaMS fields do not appear in the same order as the PEF.
- Complete only fields marked with an asterisk (*), unless this desk aid or current direction identifies another required field.

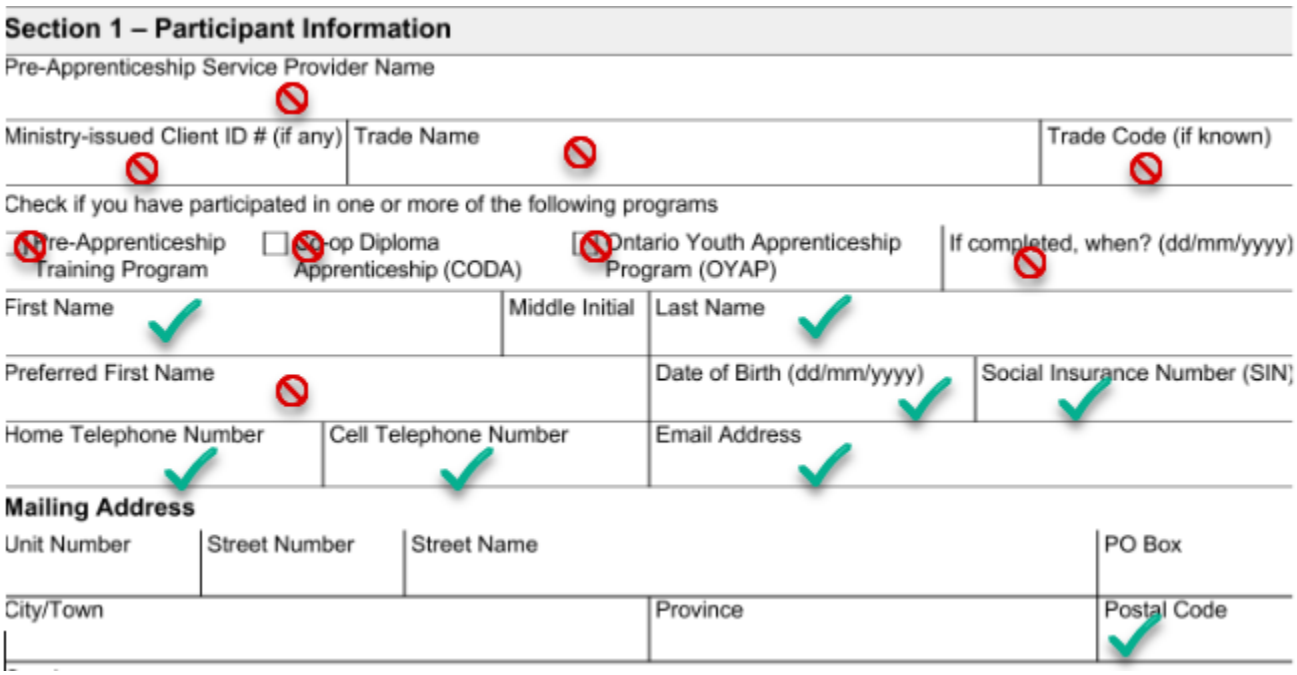
At-a-Glance Workflow for CaMS

1	Search for an existing client
2	Register or open the client and EO Case
3	Translate required Participant Enrollment Form information into CaMS
4	Create the Pre-App service plan
5	Record completed program components
6	Complete Client Summary and Activate the Service Plan
7	Record Financial Support (if applicable)
8	Close the Service Plan when all requirements are complete

Start Here – Workflow Step 1 and 2

If you are new to CaMS	If you are familiar with creating clients and cases
Begin at page 7 of the **EOIS-CaMS Pre-Apprenticeship Service Provider User Guide**. Search for the client, register only when no record exists, then create the EO Case. For extra support on the EO Case, you may want to refer to the *EOIS-CaMS -Employment-Ontario-Case-and-Client-Profile-Guide* and review the *How to Create a Client Profile and EO Case Training Video*. Proceed to Workflow Step 3.	Search for the client, register only when no record exists, then create the EO Case. Proceed to Workflow Step 3.

Workflow Step 3 - What to take from the PEF

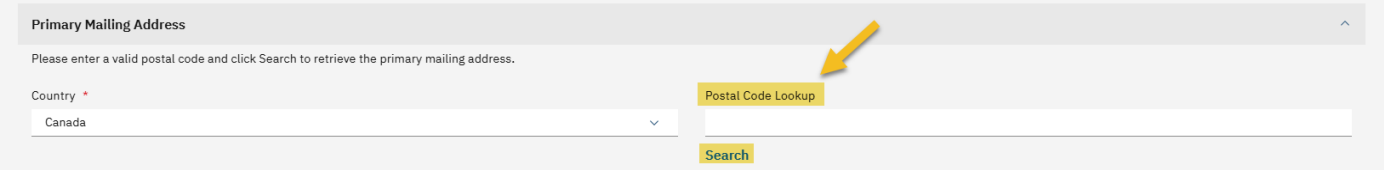


PEF page 1: identity, contact, and mailing-address source fields. Use this visual to locate source information, not as a list of fields that must all be entered.

Green checkmarks are fields that are captured in CaMS. Red circles are fields not found in CaMS.

Address Entry Tips

Use Postal Code Lookup to populate the address. See User Guide pages 11–13.
If the address is not found, follow Address Override on pages 16–20.
If primary and alternate mailing addresses are the same, select Same as primary.



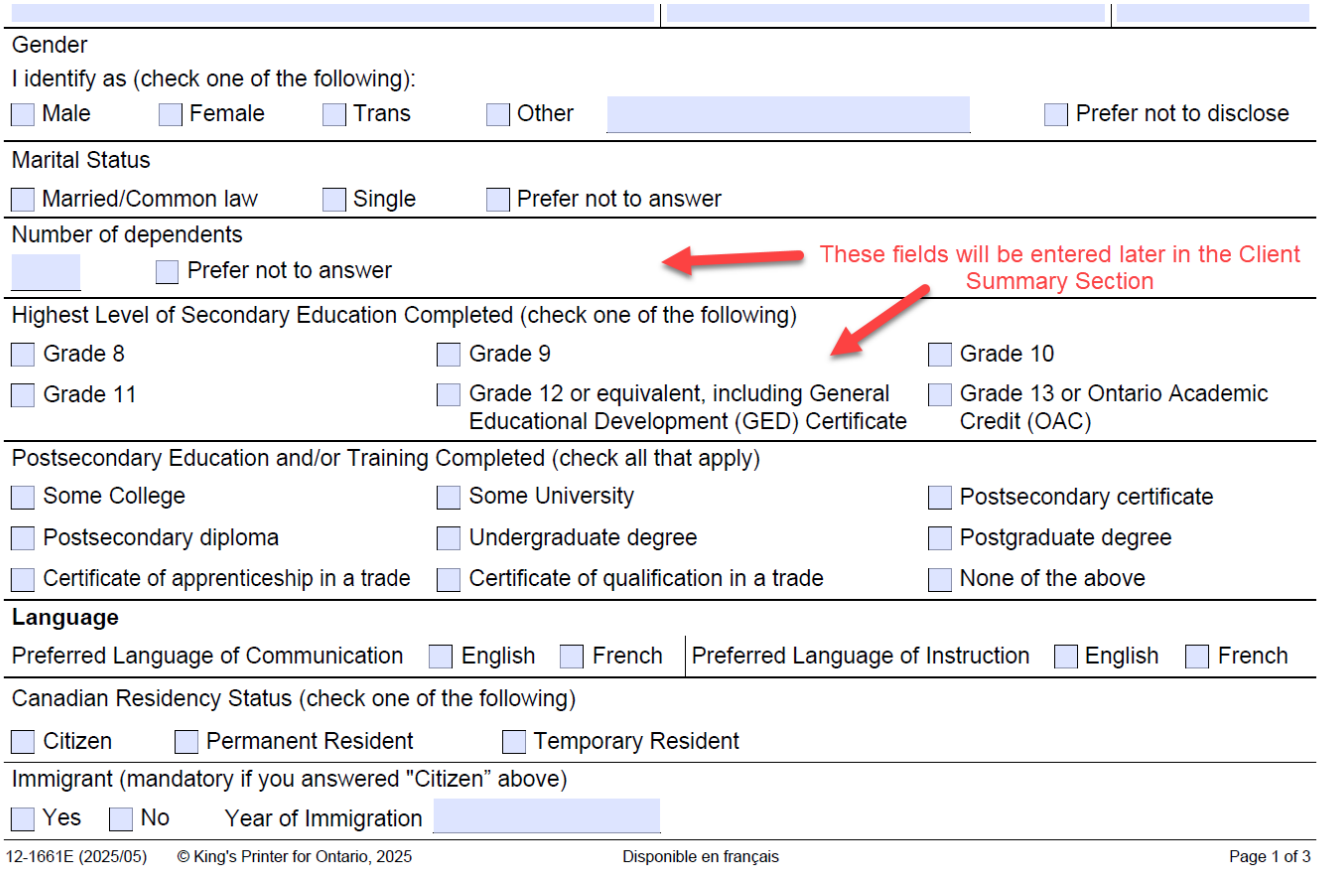
CaMS Postal Code Lookup. Included because the control and resulting address workflow are easier to understand visually.

PEF-to-CaMS Translation

Use this table to match fields from the Participant Enrollment Form (PEF) to fields on CaMS screen.

PEF field	CaMS field	Quick rule
Marital Status	Marital Status	There are seven choices within CaMS although only 3 on the PEF. Use the CaMS option that best aligns with the participant response.
Canadian Residency Status	Status in Canada	Choose the corresponding status. Temporary Resident on PEF can be Other in CaMS.
Immigrant	Immigrated to Canada?	Select the most appropriate option; Not Applicable may be used where appropriate.
Year of Immigration	Date Arrived in Canada	Where the year is provided, enter January 1 of that year in CaMS.
Preferred Language of Communication	Preferred Language	There is no Preferred Language *of Instruction* field in CaMS.
Self-Identification/ Indigenous	Client Self Identification	These do not align across the PEF and CaMS. Select the closest available match.

Participant Enrollment Form page 1



Gender

I identify as (check one of the following):

☐ Male ☐ Female ☐ Trans ☐ Other ☐ Prefer not to disclose

Marital Status

☐ Married/Common law ☐ Single ☐ Prefer not to answer

Number of dependents

☐ Prefer not to answer

These fields will be entered later in the Client Summary Section

Highest Level of Secondary Education Completed (check one of the following)

☐ Grade 8 ☐ Grade 9 ☐ Grade 10

☐ Grade 11 ☐ Grade 12 or equivalent, including General Educational Development (GED) Certificate ☐ Grade 13 or Ontario Academic Credit (OAC)

Postsecondary Education and/or Training Completed (check all that apply)

☐ Some College ☐ Some University ☐ Postsecondary certificate

☐ Postsecondary diploma ☐ Undergraduate degree ☐ Postgraduate degree

☐ Certificate of apprenticeship in a trade ☐ Certificate of qualification in a trade ☐ None of the above

Language

Preferred Language of Communication ☐ English ☐ French | Preferred Language of Instruction ☐ English ☐ French

Canadian Residency Status (check one of the following)

☐ Citizen ☐ Permanent Resident ☐ Temporary Resident

Immigrant (mandatory if you answered "Citizen" above)

☐ Yes ☐ No Year of Immigration

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PEF page 1: fields that require translation or special handling in CaMS. The visual is included because the labels differ between the PEF and CaMS.

EXAMPLE: PEF Year of Immigration: 2020 → CaMS Date Arrived in Canada: January 1, 2020.

Other Client Data Fields Information Tips

Number of dependents and Highest Level of Education

The PEF captures this information on page 1.

CaMS captures this information later in the process when completing the Client Summary.

Sections 2 and 3 of PEF

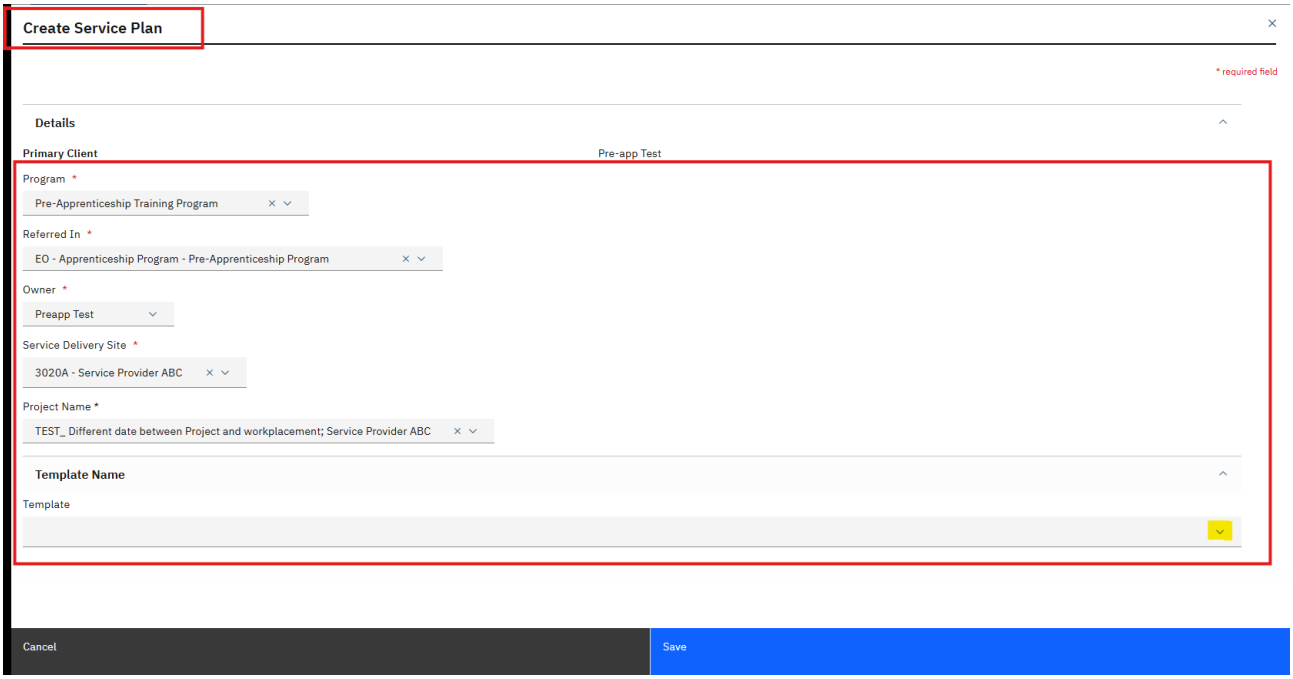
NOT ENTERED: Sections 2 and 3 of the PEF are not required in CaMS. They support document verification, consent, and program administration.

Workflow Step 4 - Create the Pre-App Service Plan

PREREQUISITE: An EO Case must exist. SIN, email address, and phone number must be recorded before creating a Pre-App service plan.

1. From Employment Ontario Home, select NEW SERVICE PLAN.
2. Use the required selections below.

Field	Selection
Program	Pre-App
Referred In	Pre-App
Owner	Default User
Service Delivery Site	Your site
Project Name	Approved Project Name



Create Service Plan screen. Included to show where the required Pre-App selections appear together. Source: User Guide, page 34.

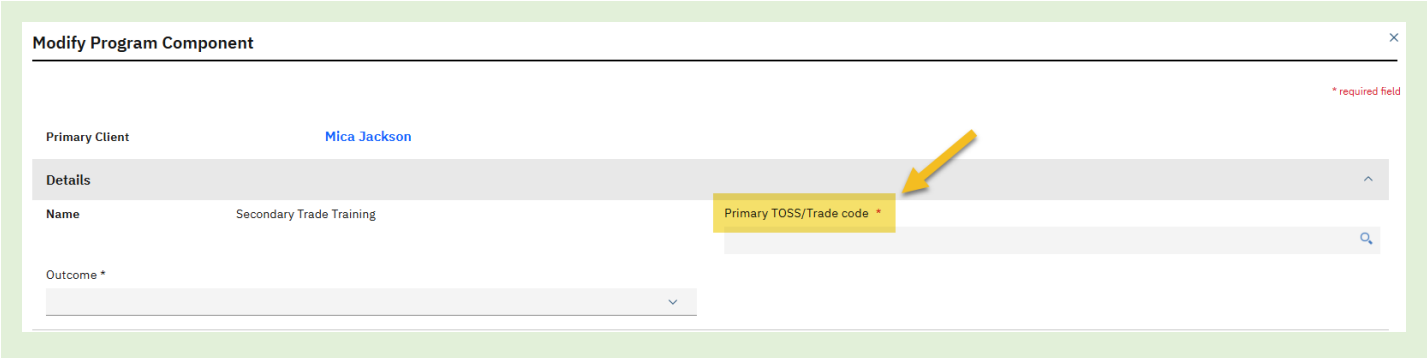
RESULT: The new service plan status is Open.

A step-by-step video is available. See: Service Plan Management for Pre-App

Workflow Step 5 - Program Components

Business Rules

1. Enter the program components only after they are completed by the client as they will not save without an Outcome selected.
2. Select the Primary Trade every time a Program Component is entered so the trade is associated with the reported outcome.



TIMING Reminder: Do not enter Program Components until the participant has completed the component. An Outcome is required before saving.

Outcome selection

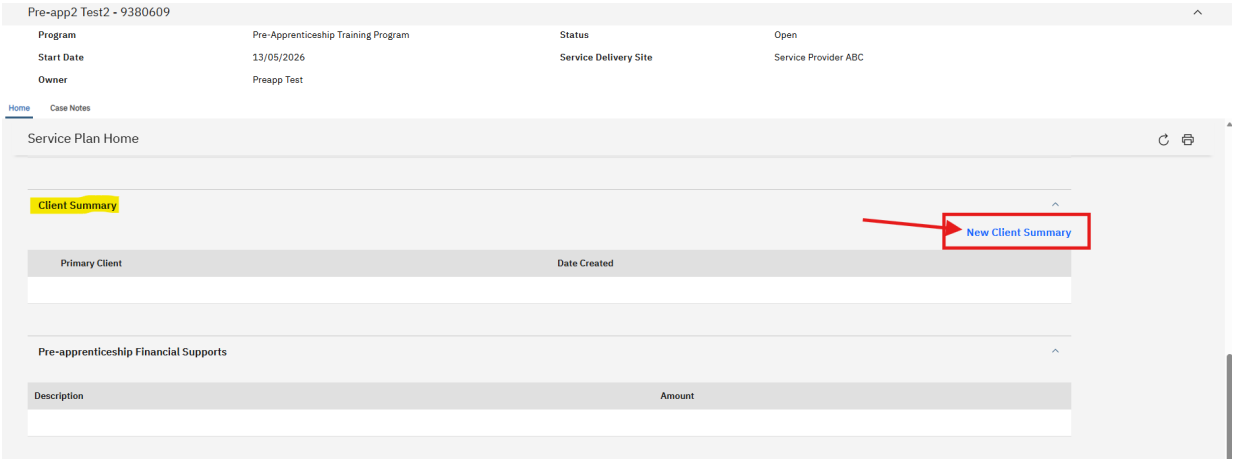
Outcome	Use when
Attained	Participant completed the component.
Not Attained	Participant did not complete the component.
Cancelled	This option can only be used for Optional components. It may be used when an Optional component is no longer applicable.

Component Rules and Stop Point

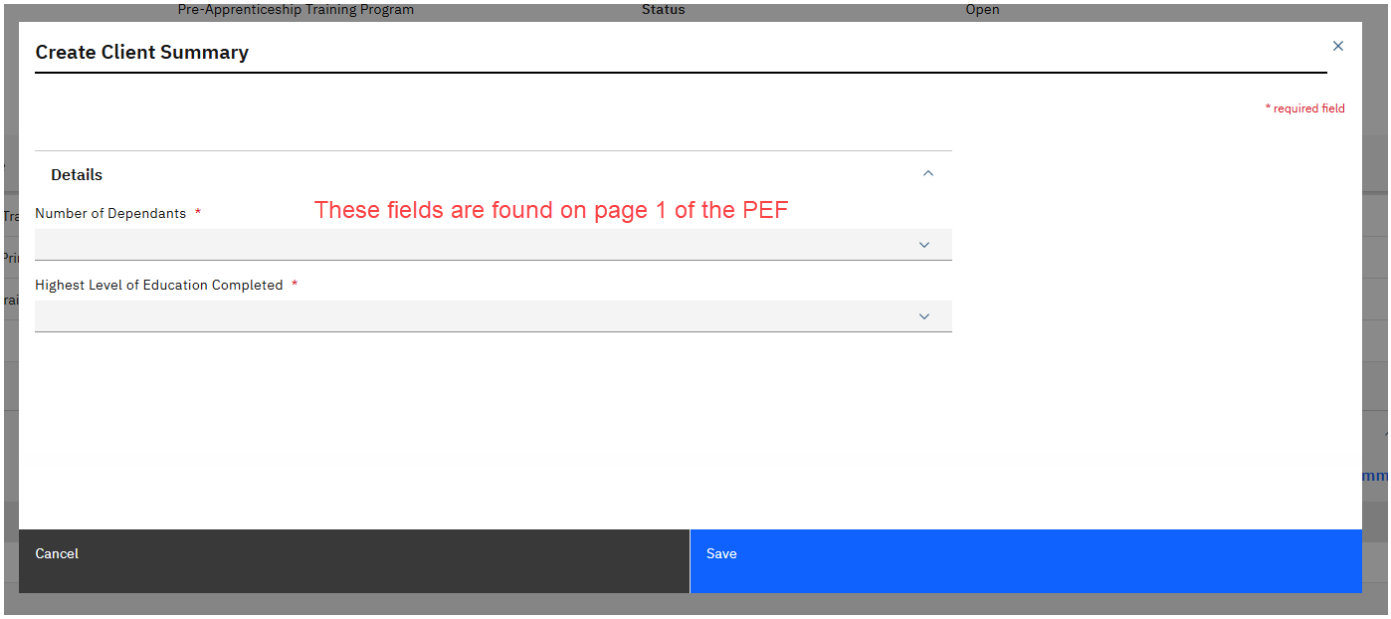
For mandatory components, use Attained or Not Attained.
Cancelled is allowed only for optional additional activities.
Mandatory components cannot be deleted.
Optional components may be deleted while the plan is not Closed.
If an optional component has Attained or Not Attained, change the outcome to Cancelled or blank before deletion.

Workflow Step 6- Complete the Client Summary and Activate the Service Plan

1. On the Service Plan Home page, select **NEW CLIENT SUMMARY**.



2. Complete all mandatory fields in the **Details** section. This information was captured on page one of the PEF.
3. The Client Summary is required before a service plan can be activated.

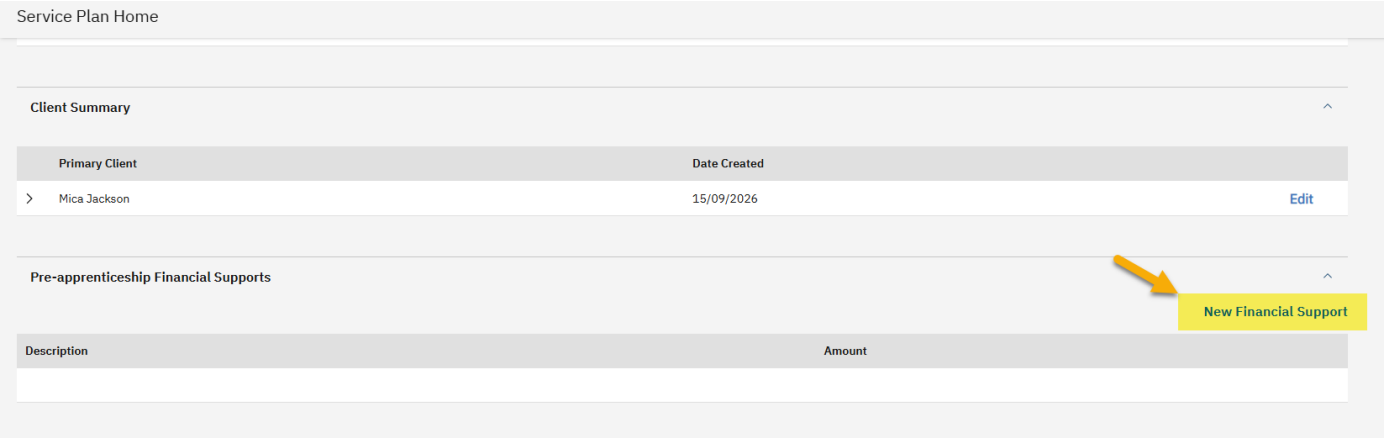


IMPORTANT: Creating a Client Summary changes the Pre-App Service Plan status from Open to Active

Workflow Step 7 – Record Financial Supports

WHEN TO USE: **Financial Support is entered after the Client Summary has been completed and the service plan is Active.

1. Select NEW FINANCIAL SUPPORT from the Service Plan Home page.
2. Complete all mandatory fields in the Details section.
3. Financial Support can be modified while the service plan remains Active.



**LIMIT: **Financial Support amounts must be $2,000.00 or less.

Workflow Step 8 – Close the Service Plan when all requirements are complete

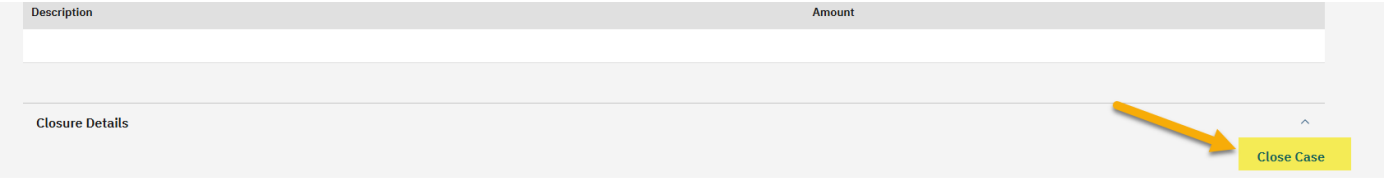
Business Rule - CHECK BEFORE CLOSING: **Once closed, a service plan cannot be reopened.

Verify the following:

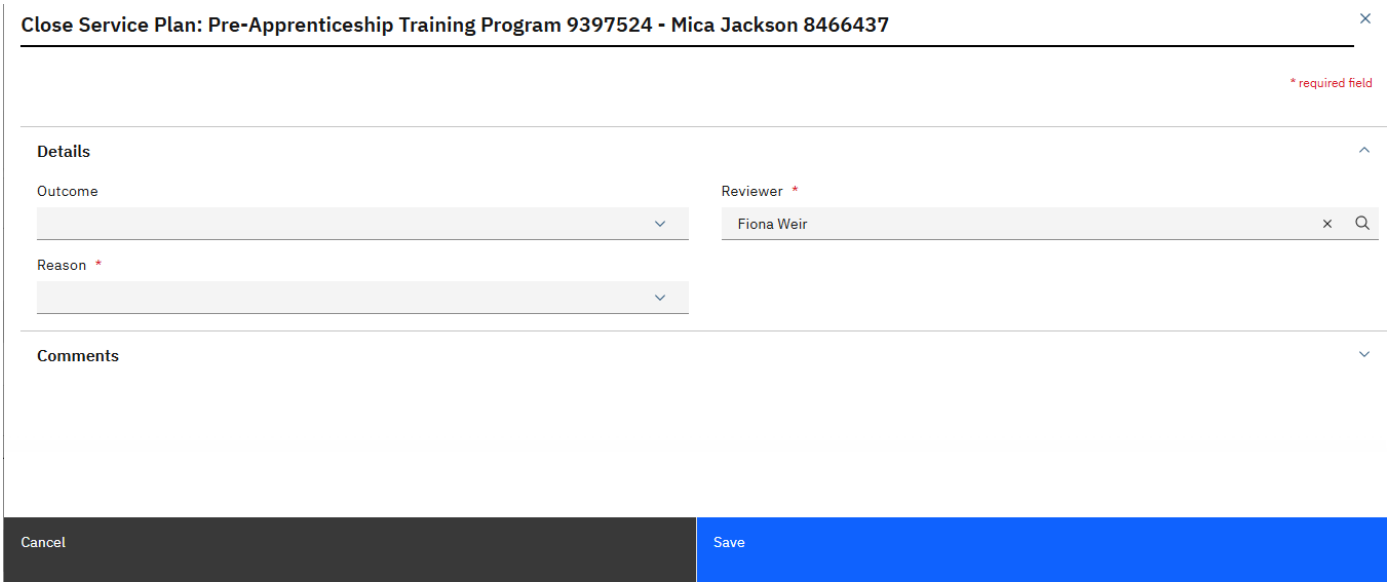
- ✓ All Program Components have an Outcome recorded.
- ✓ Client Summary has been completed.
- ✓ Financial Support information has been entered.
- ✓ All required updates have been made before closure.

Closing the Service Plan

1. Select CLOSE CASE.



2. Complete all required closure fields.



Outcome:

- Did the client complete the program? Choose **Outcome** = Complete.
- If the client did not complete the program choose **Outcome** = Incomplete.

Reason:

- If the client completed the program choose **Reason** = Completed
- If the client did not complete the program, choose the **Reason** that they did not complete from the dropdown menu.
- Enter any notes or comments you have under the Comments section.

3. Select SAVE.
4. The status changes from Active to Closed.

AFTER CLOSURE: ****Program Components, Client Summary, Financial Support, and Service Plan details can no longer be added or edited.**

Where to Look in the User Guide

Task	Pages
Create client profile and EO Case	7–15
Address entry and override	11–20
Modify client profile	21–24
Program streams and components	25–30
Create the Pre-App service plan	33–35
Manage components	35–44
Client Summary	31-32, 44-46
Financial Support	46-49
Modify Service Plan	50
Close Service Plan	51-54
Service Plan Statuses	55