Employment Ontario Information Systems (EOIS) – Case Management System (CaMS): Pre- Apprenticeship Service Provider User Guide



Pre-Apprenticeship Training Program – Case Management System User Guide

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Contents

Document History 4

Introduction 5

Roles and Responsibilities 6

Employment Ontario Case Structure 6

- Employment Ontario Case 7
- Creation of a Client Profile 7
- Address Override 16
- Modify Client Profile 21

Pre-App Service Plan 25

- Clients' Eligibility Criteria 25
- Program Streams 25
  - Stream 1: Year 1 Ready Stream 26
  - Stream 2: Try a Trade Stream 26
- Components 27
  - Stream 1: Year 1 Ready Stream 27
  - Stream 2: Try a Trade Stream 28
- Client Summary 31

Building a Pre-App Service Plan 32

- Creating a Pre-App Service Plan 33
- Adding Components 35
- Modify or Complete Components 38
- Delete Components 42
- Adding Client Summary (Activate the Pre-App Service Plan) 44
- Adding Pre-Apprenticeship Financial Support 46

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Modify Financial Support 48
Delete Financial Support 49
Modify Pre-App Service Plan 50
Close Pre-App Service Plan 51
APPENDIX 55
Service Plan Status 55

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Document History

- Version 1.0 (August 2026): Initial version of the guide

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Employment Ontario Information Systems (EOIS) – Case Management System (CaMS): Pre- Apprenticeship Service Provider User Guide

Introduction

This chapter covers the Employment Ontario Case, the client profile and the management of a **pre-apprenticeship service plan** within the EOIS Case Management System (the system).

In the system, all activity relating to a client is stored in an Employment Ontario Case. Within an Employment Ontario Case, information specific to the client is captured in a client profile and information relating to programs and services is captured in service plans.

The service plan is a system tool that allows an Employment Ontario service provider to plan and manage the delivery of services and activities to help a client achieve a specific goal.

The following icons appear throughout this user guide:



This icon denotes a helpful tip or a reminder related to a system step or a business process.



This icon denotes valuable information.



This icon denotes information that must be adhered to as it may impact business processes.

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Roles and Responsibilities

The creation and management of service plans is the responsibility of service providers. Service provider members with appropriate system access may view, create, modify and close Pre-App service plans that are assigned to their respective organizations.

Access to service plan functions varies by system user role.

Roles	Search/View Pre-app Service Plan	Create/Modify Pre-app Service Plan
Service Provider Manager	Yes	Yes
Service Provider Caseworker	Yes	Yes
Service Provider Administrator	Yes	Yes
Employer Service Provider Manager	No	No
Employer Service Provider Caseworker	No	No

The following roles can search, view, create, and modify Pre-app Service Plans:

- Service Provider Manager
- Service Provider Caseworker
- Service Provider Administrator

The following roles cannot search, view, create, and modify Pre-app Service Plans:

- Employer Service Provider Manager
- Employer Service Provider Caseworker

Employment Ontario Case Structure

Within the system, a case is an organized collection of data. An Employment Ontario Case is unique in that it serves as a folder for other service plans cases, which are used by service providers.

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Employment Ontario Information Systems (EOIS) – Case Management System (CaMS): Pre- Apprenticeship Service Provider User Guide

Employment Ontario Case

In order to manage the many programs and services that Employment Ontario delivers; every client must have an Employment Ontario Case. In CaMS, all activity relating to a client is stored in an Employment Ontario Case. A case is essentially an organized collection of data.
Within an Employment Ontario Case, information specific to the client is captured in a client profile and information relating to programs and services is captured in service plans.

The first step in creating an Employment Ontario Case is to register the client in the system.
The user will determine whether the client exists in the system by conducting a client search. If the client record does not exist, the user will continue with the registration process which creates both a client profile and an Employment Ontario Case simultaneously. The client's profile can be modified later as necessary.

Creation of a Client Profile



Before any client data can be captured in the system, the client must complete the relevant Participant Registration form providing consent on the collection of personal information.

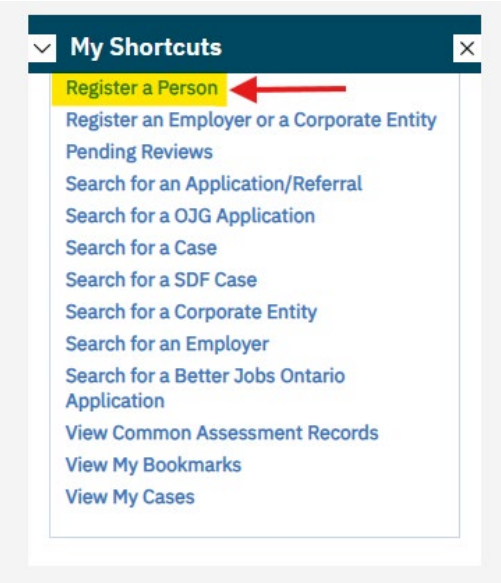
The initial step is to **Register a Person** which then creates an Employment Ontario Case. Each client has an Employment Ontario Case. An Employment Ontario Case is unique, and it serves as a folder for service plans. The Employment Ontario Home page allows the user to add, view and/or edit information about the case.

System Steps

Step 1: Welcome to the EOIS Case Management System Page

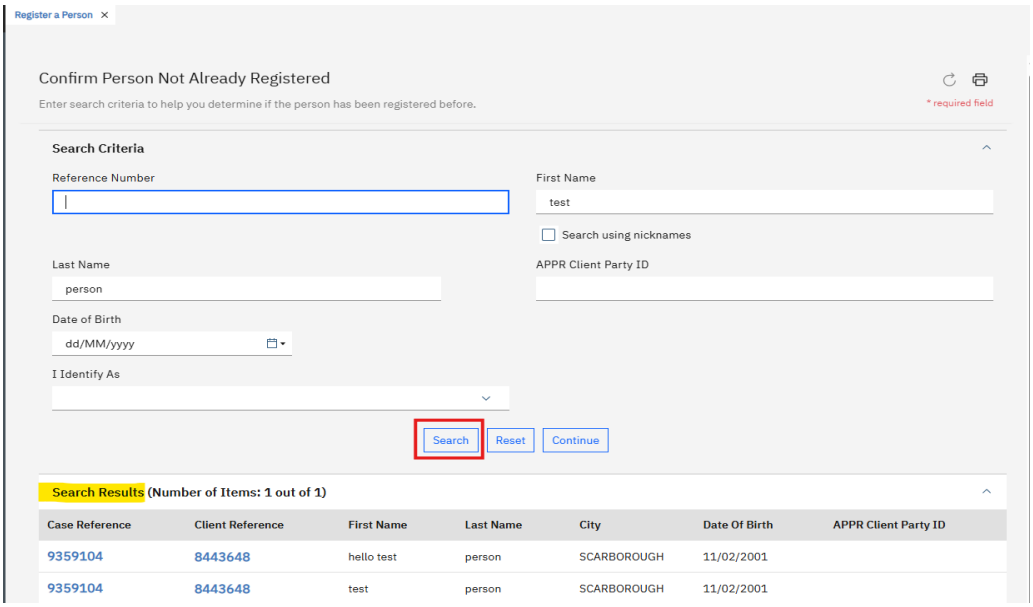
Click **Register a Person** in the **My Shortcuts** list.

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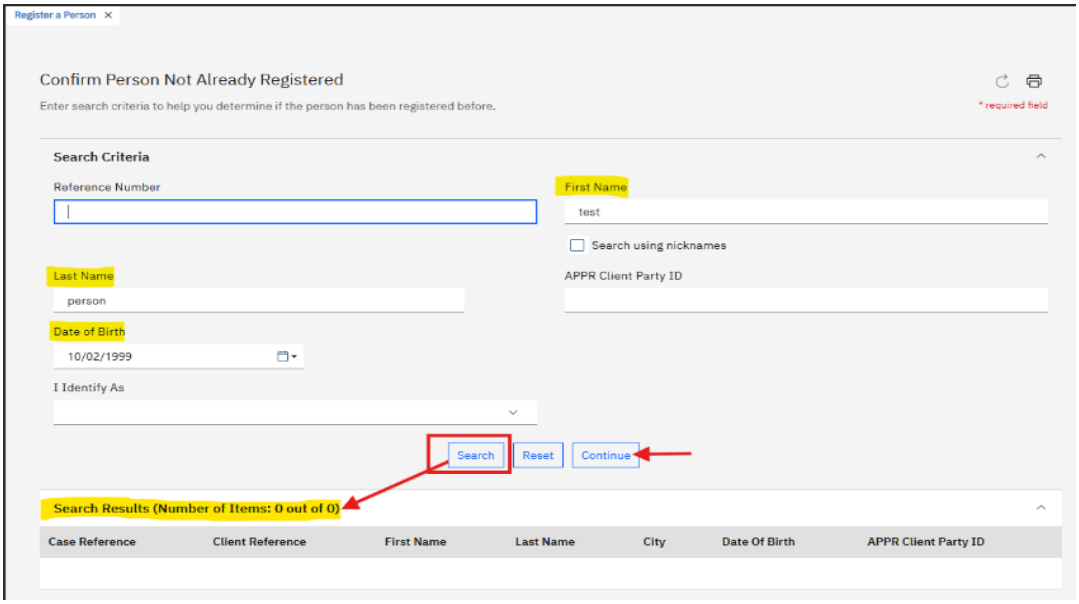
Step 2: Confirm Person Not Already Registered Page

Within the Search Criteria information panel, enter as much information possible to search for a client, and click Search. The system will display the results that match the search criteria in the Search Results information panel along with the number of items returned, if any. A search is limited to the first 50 matches, but the system will display the total number of matches.



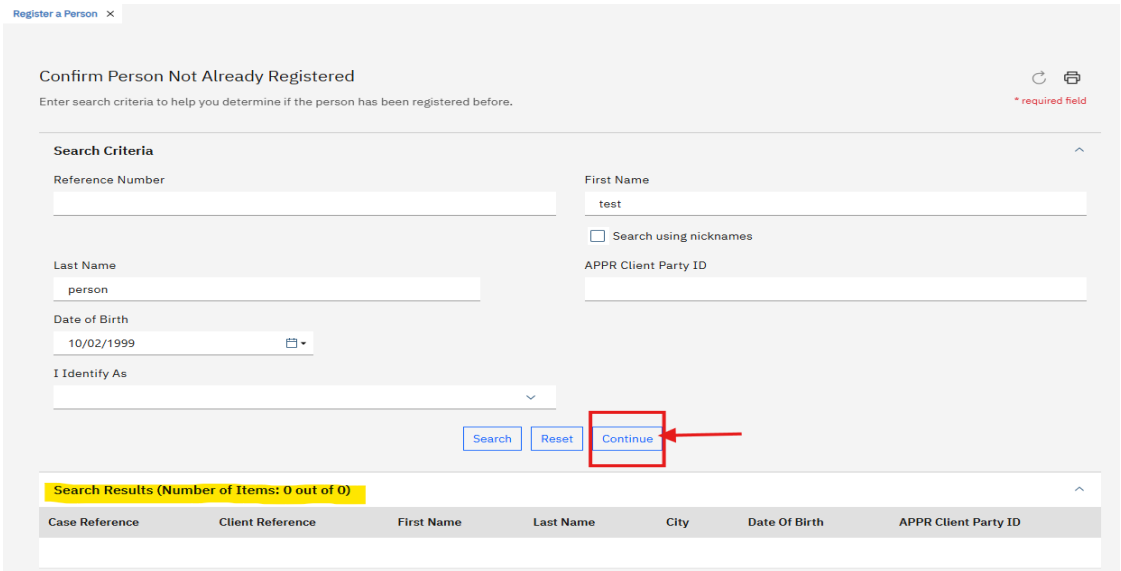
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If the search result is long, refine the search by including additional criteria such as Date of Birth



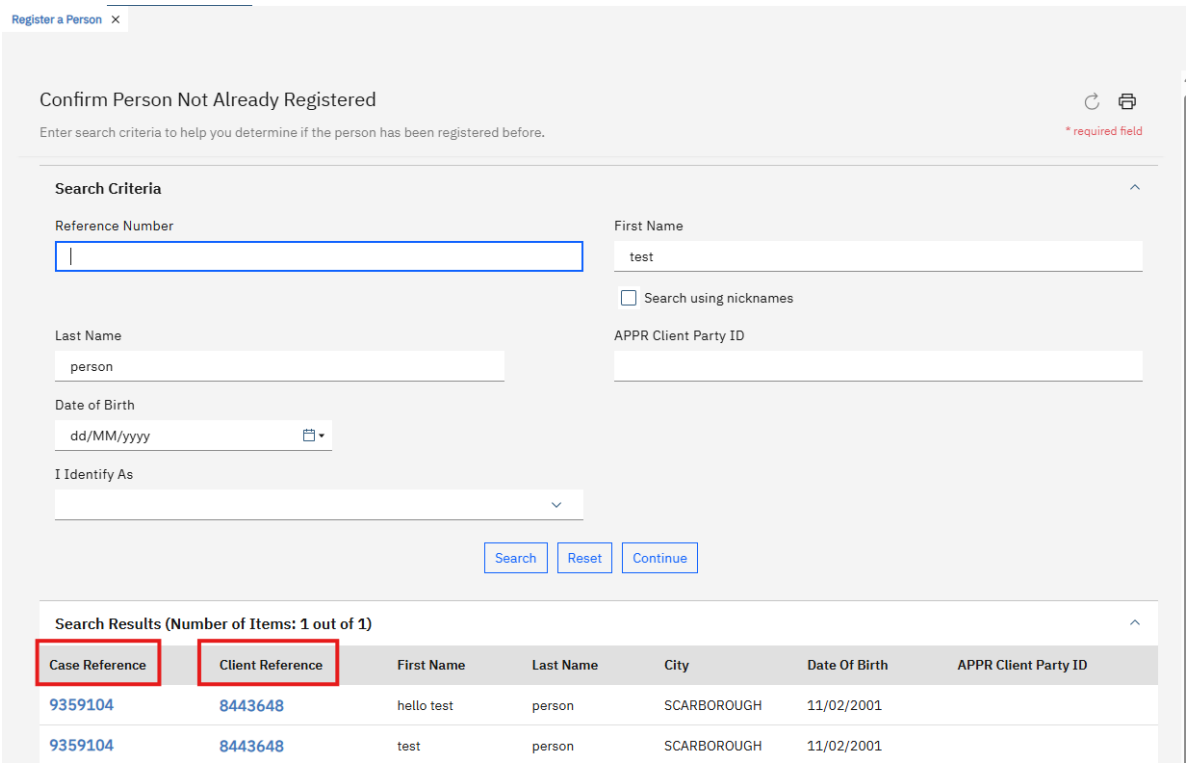
Step 3: Confirm Person Not Already Registered Page

If the person does not appear in the search results, click Continue to proceed with registering the client.



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If the Search Results reveal that an open Employment Ontario Case already exists for the client, click either the CASE REFERENCE next to the client's name to view the home page of the existing Employment Ontario Case or CLIENT REFERENCE to view the client's Person Home page.



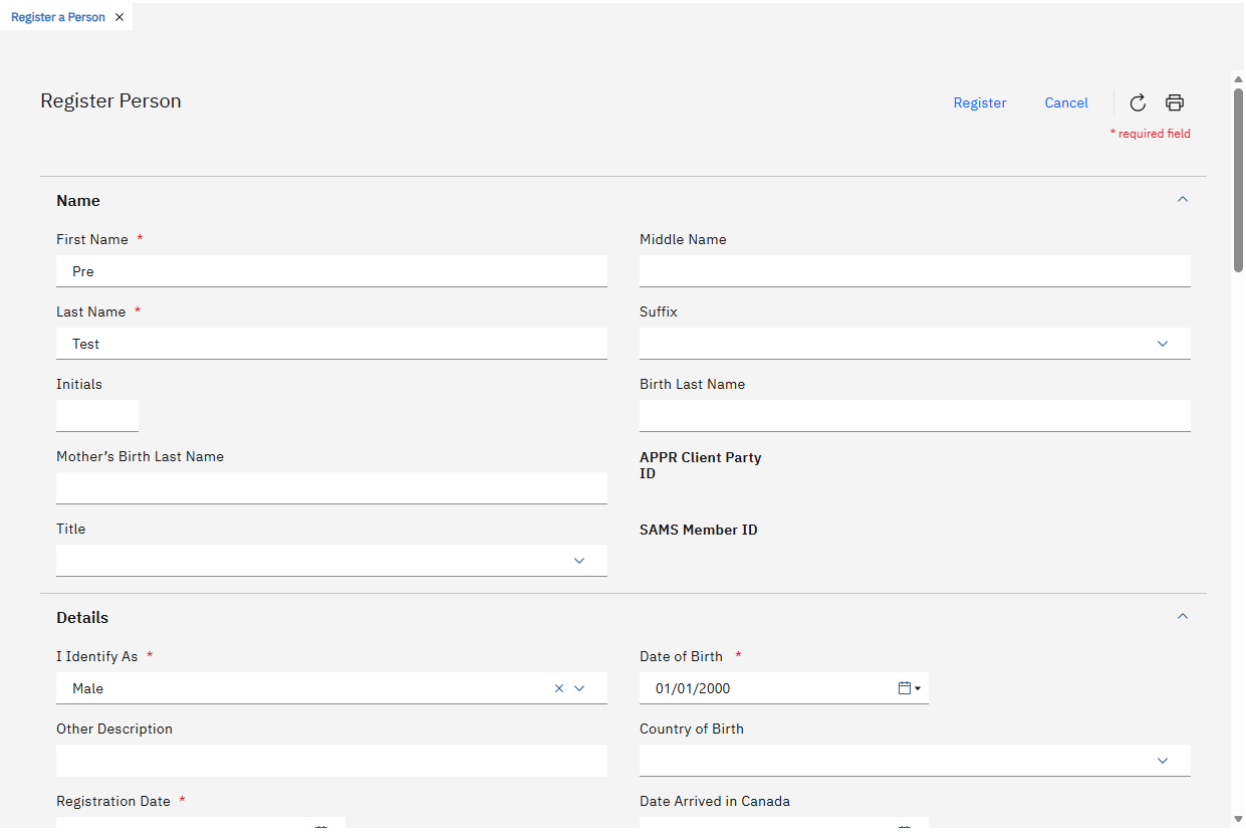
If the information belongs to current client but needs to be updated, proceed to section **"Modify Client Profile."**

If the contact information and SIN match current client, then proceed to section **"Building a Pre-App Service Plan."**

Step 4: Register Person Page

The system will display the Person Registration page pre-populating data fields that were entered by the user as search criteria. The user can modify these pre-populated fields. Enter as much information as possible into the available fields. Fields marked with an asterisk are mandatory.

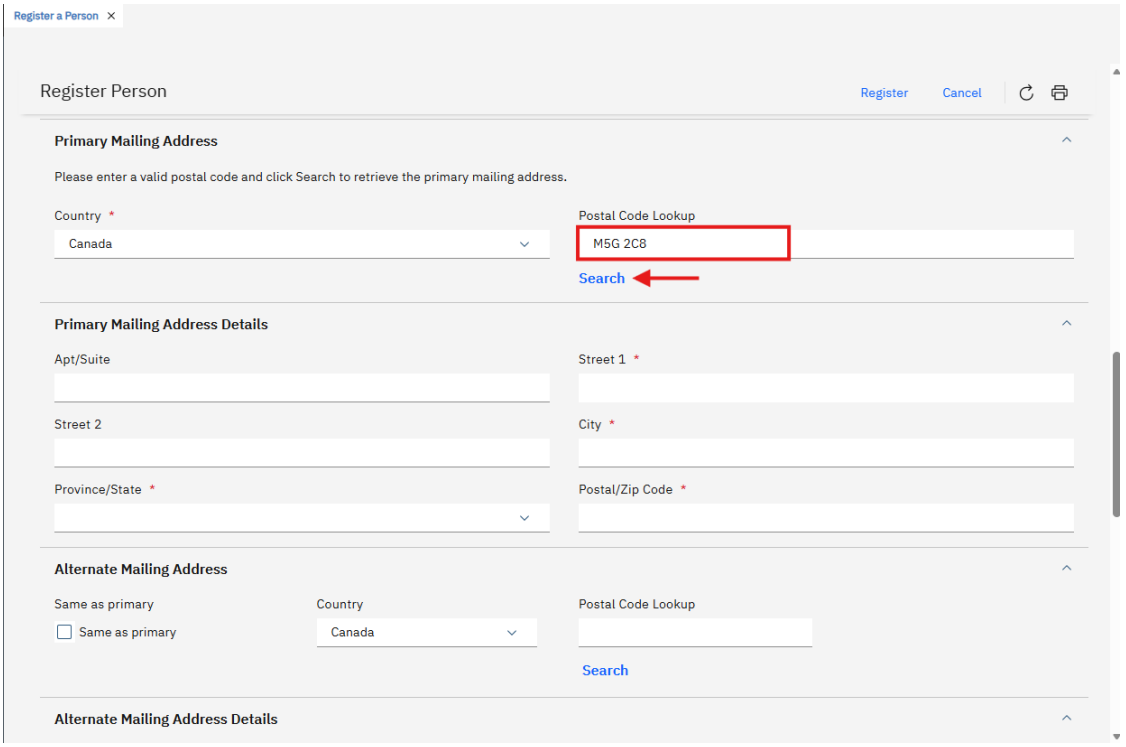
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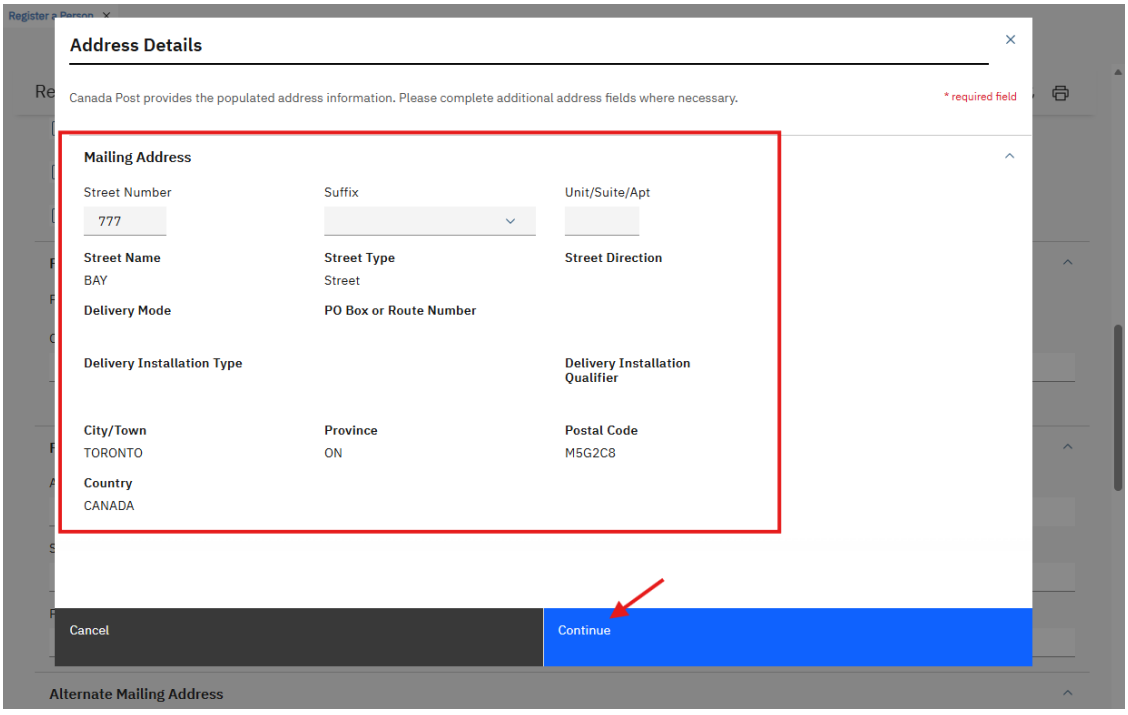


Step 5: Address Details Page

Within the Primary Mailing Address information panel, enter the postal code of the client being registered in the Postal Code Lookup field, and click Search. The Address Details page appears in a separate window.

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An Address Details page will load pre-populated with the address details for the given postal code. Users will also have the ability to enter additional information which has not been defined

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by the postal code, such as the unit or suite number, and any other relevant information. Click CONTINUE to return to the Person Registration page. The address fields in the Primary Mailing Address Details information panel will be populated with the information retrieved from the Address Details page.



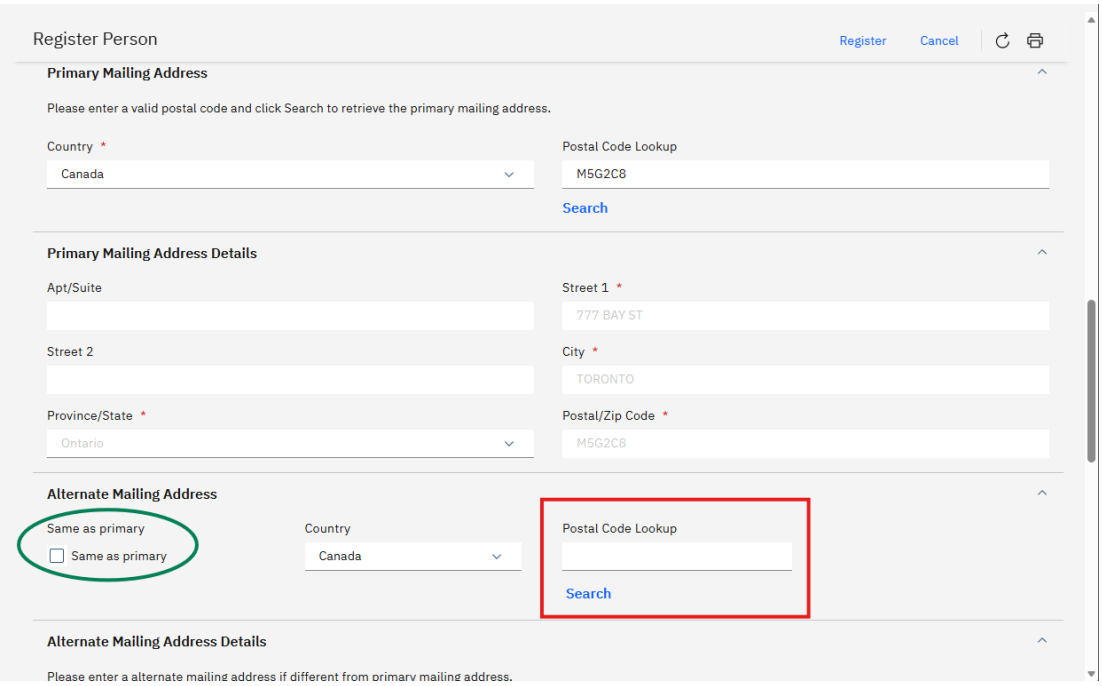
If the address cannot be found on the Postal Code Look-up page, verify the address on Canada Post's website. If the verified address cannot be found on the Address Details page, please see the Address Override section for details on manually entering addresses.



If a client's primary address is outside Ontario, this may affect program eligibility.

Step 6: Register Person Page

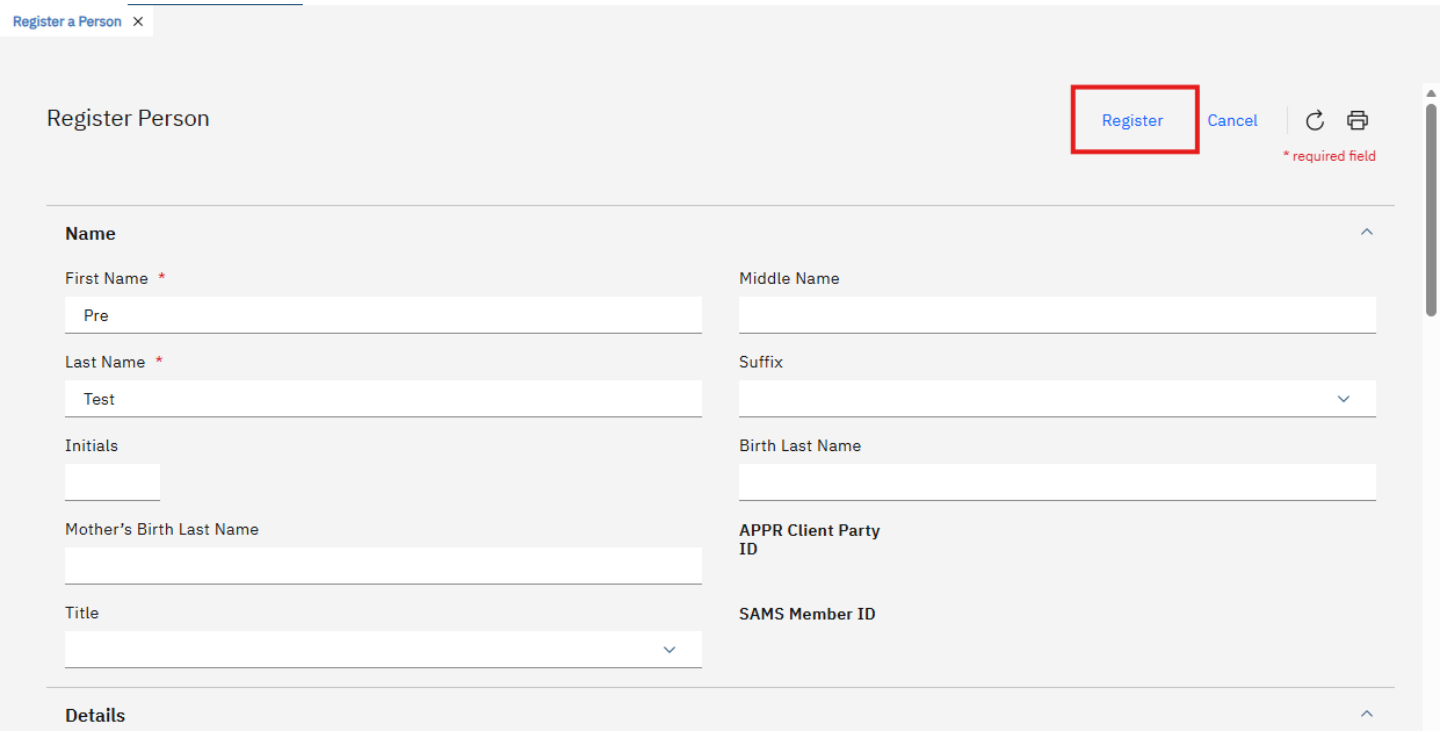
If the **Primary Mailing Address** and **Alternate Mailing Address** are the same, check the Same as primary check box which will populate the appropriate fields. If not, repeat Steps 5 to complete the Alternate Mailing Address information panel.



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Step 7: Register Person Page

Continue creating the client's profile and click **Register**. This step automatically creates an Employment Ontario Case, and the user is taken to the Person Registration Completed page, where there is a link to client's Employment Ontario Home page.



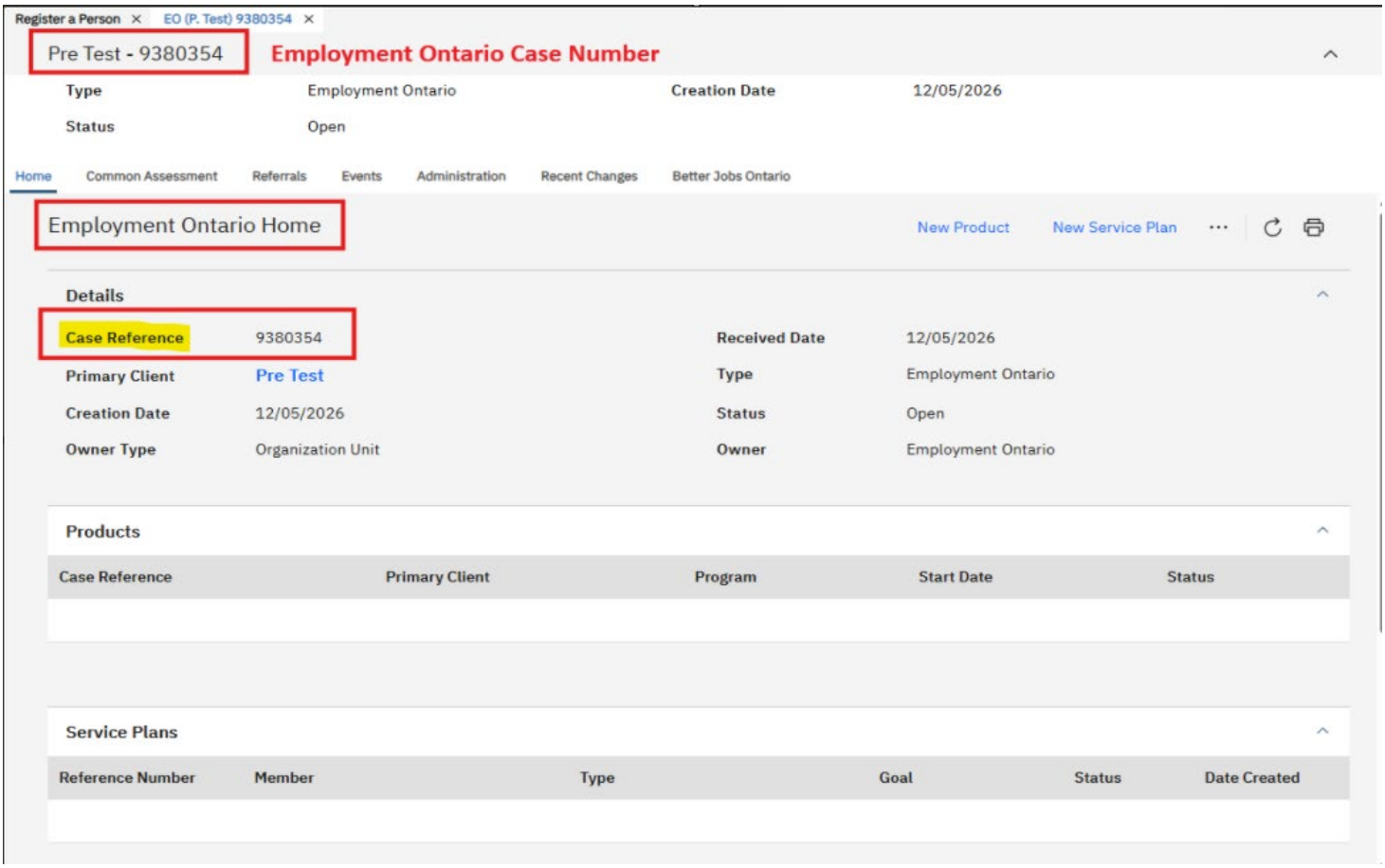
Step 8: Person Registration Completed Page

The person registration has been completed. Select **Click here to open the Employment Ontario Home page.**



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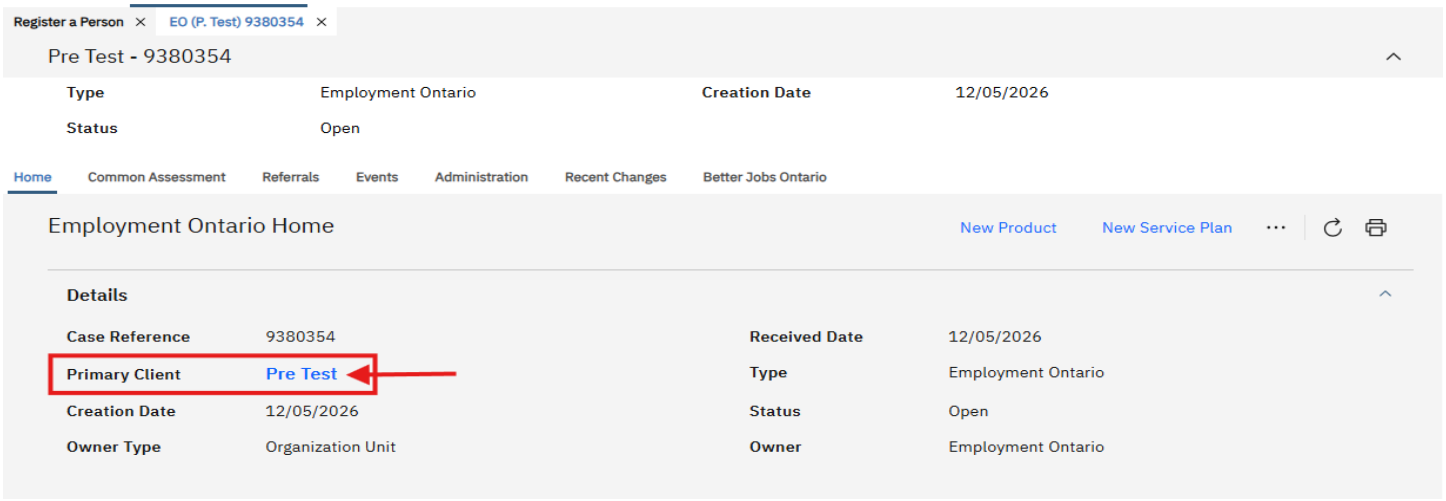
The system will generate two unique identifiers: one is a **Client Reference Number**, located on the client's Person Home page, and the other is the **Case Reference Number** which is associated with the **Employment Ontario Case** and located on the client's Employment Ontario Home page.

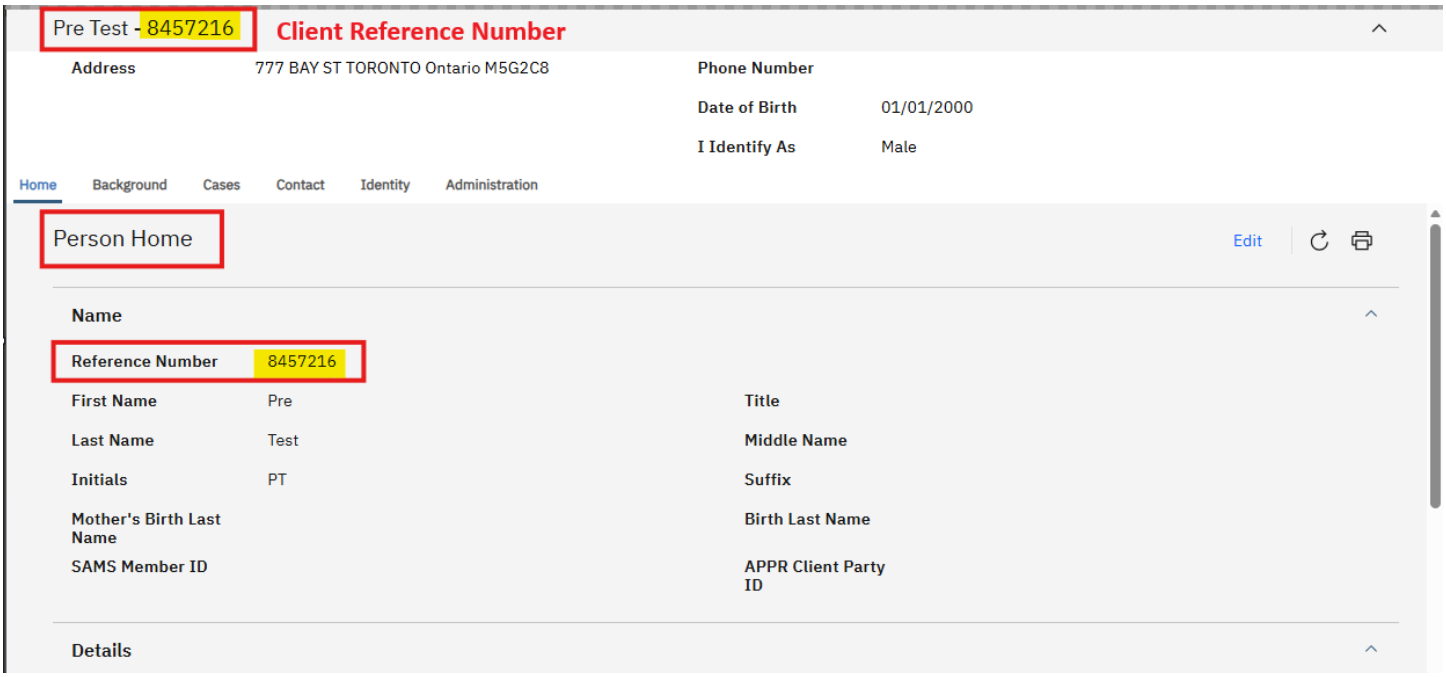


The Employment Ontario Case associates an individual with all the programs and services in which they are currently, or have previously, participated.

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To access the Client Profile, click on the client's name.





The Employment Ontario Case associates an individual with all the programs and services in which they are currently, or have previously, participated.

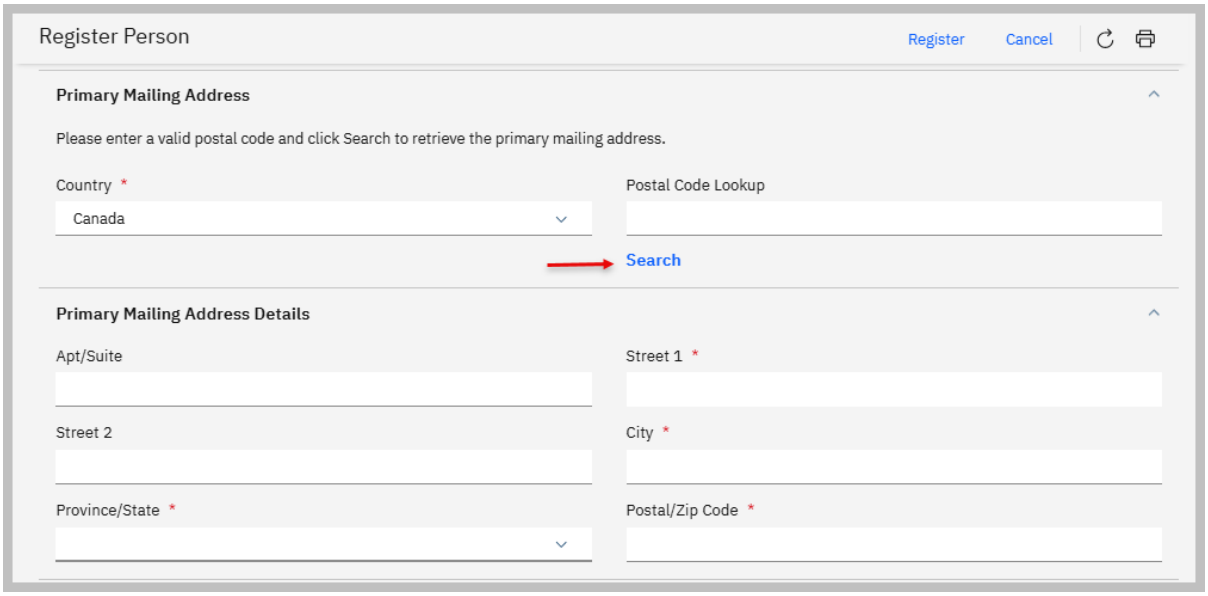
Address Override

In some cases, a client's address may not appear when using the postal code lookup/search tool. The address will need to be manually typed in.

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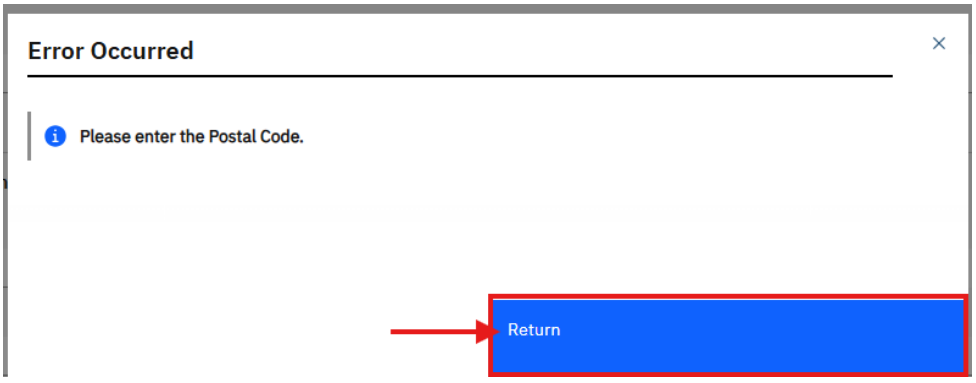
Step 1: Register Person Page

If you are on the Register a Person page, and the postal code lookup/search tool is unable to return the desired address, delete the postal code you entered and click Search again.



Step 2: Error message

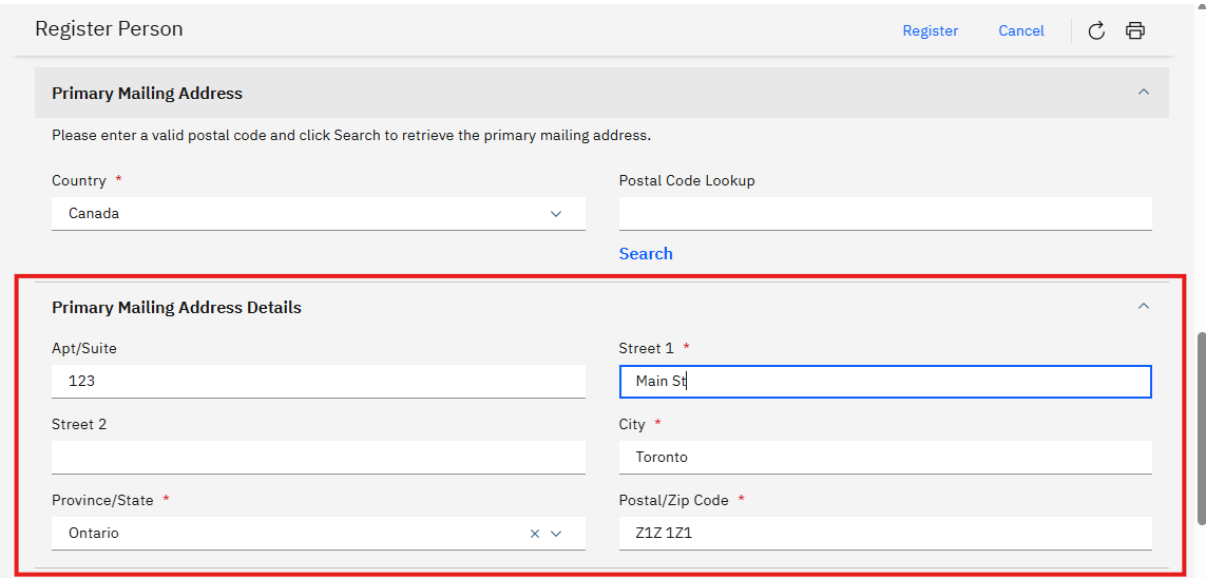
The next pop-up window will display 'Error Occurred – Please enter the Postal Code'. Click Return.



Step 3: Enter the new address.

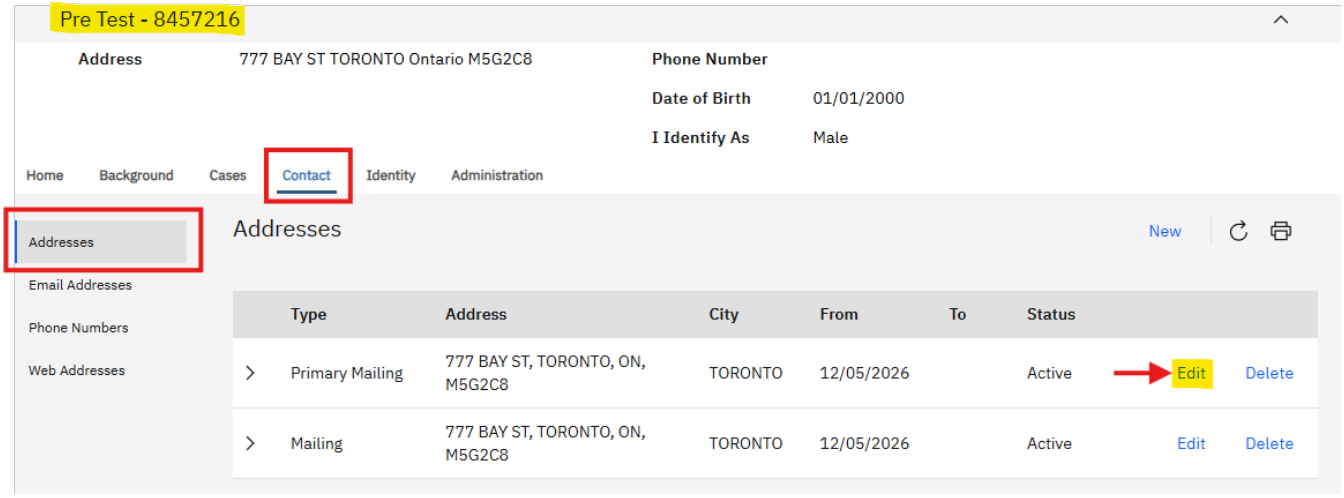
The Address fields on the Register Person Page are now editable. A new address can be entered and saved.

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To override or edit an existing address within CaMS, go to the applicable record and click on the Contact tab. Locate the address that needs to be updated, click the Action menu, and choose Edit.

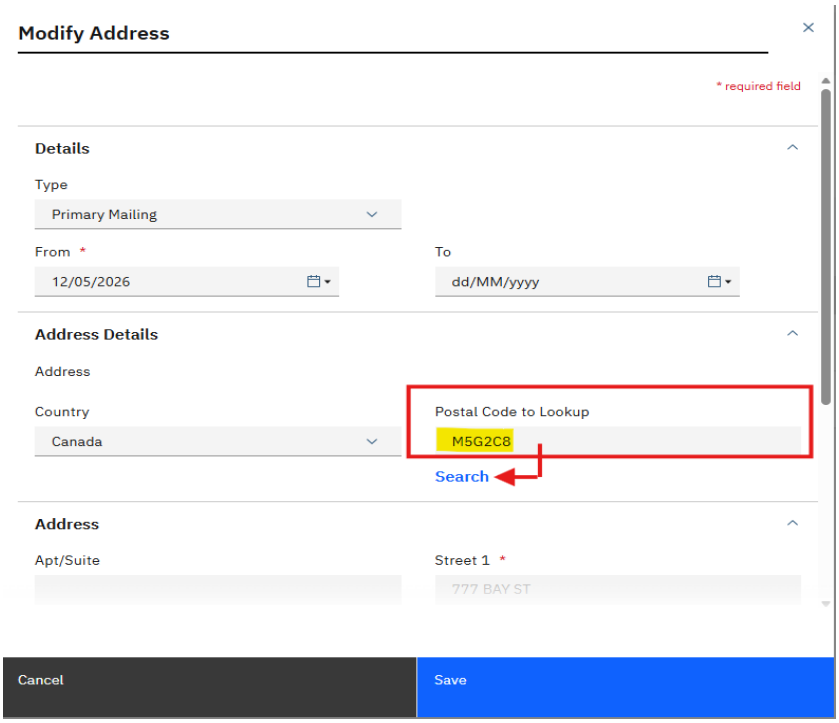
Step 1: Person Home Page



Step 2: Modify Address Window

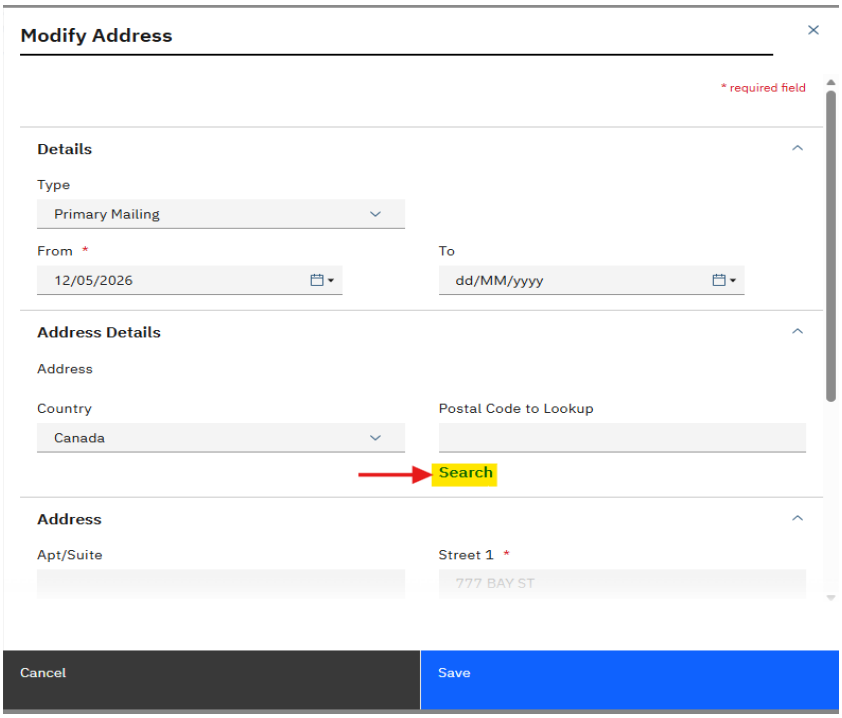
Use the postal code lookup/search tool – that can return the desired address.

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Or

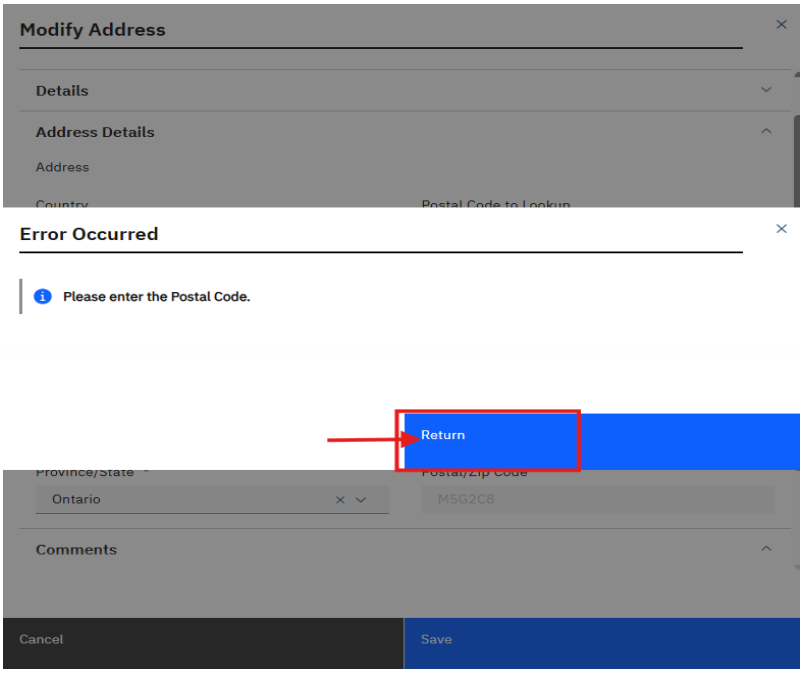
when the postal code lookup/search tool is unable to return the desired address, delete the postal code you entered and click Search again. (without postal code value)



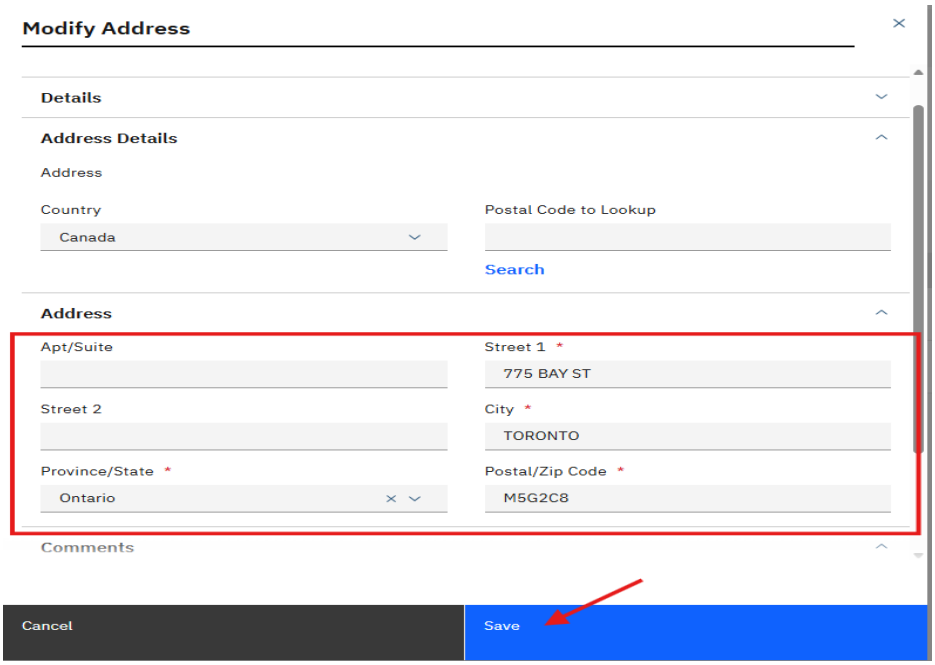
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Step 3: Error Message

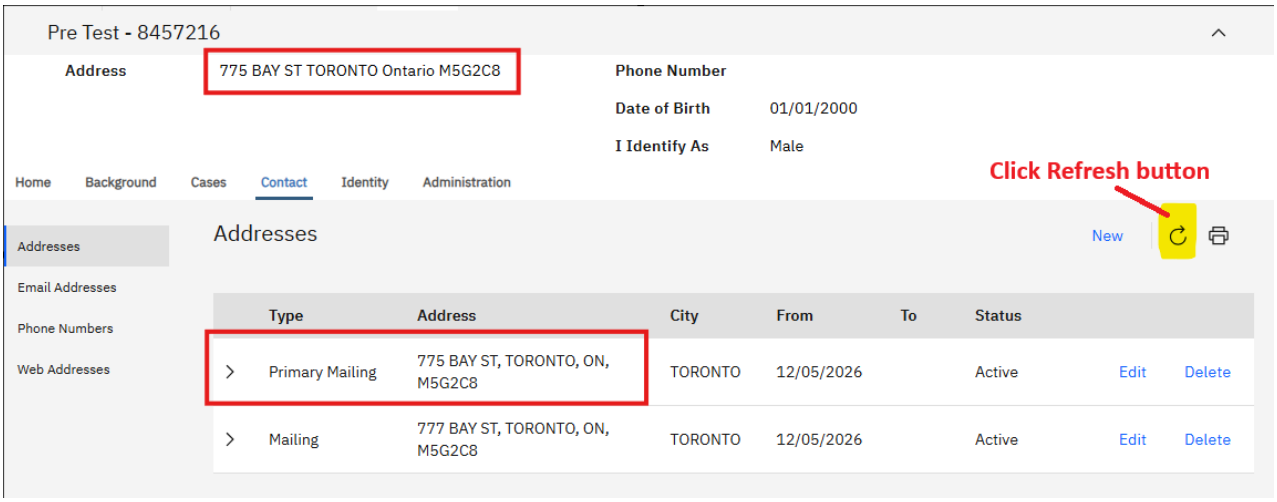
The next pop-up window will display 'Error Occurred – Please enter the Postal Code'. Click Return.



The Address fields on the Modify Address window are now editable. A new address can be entered and saved.



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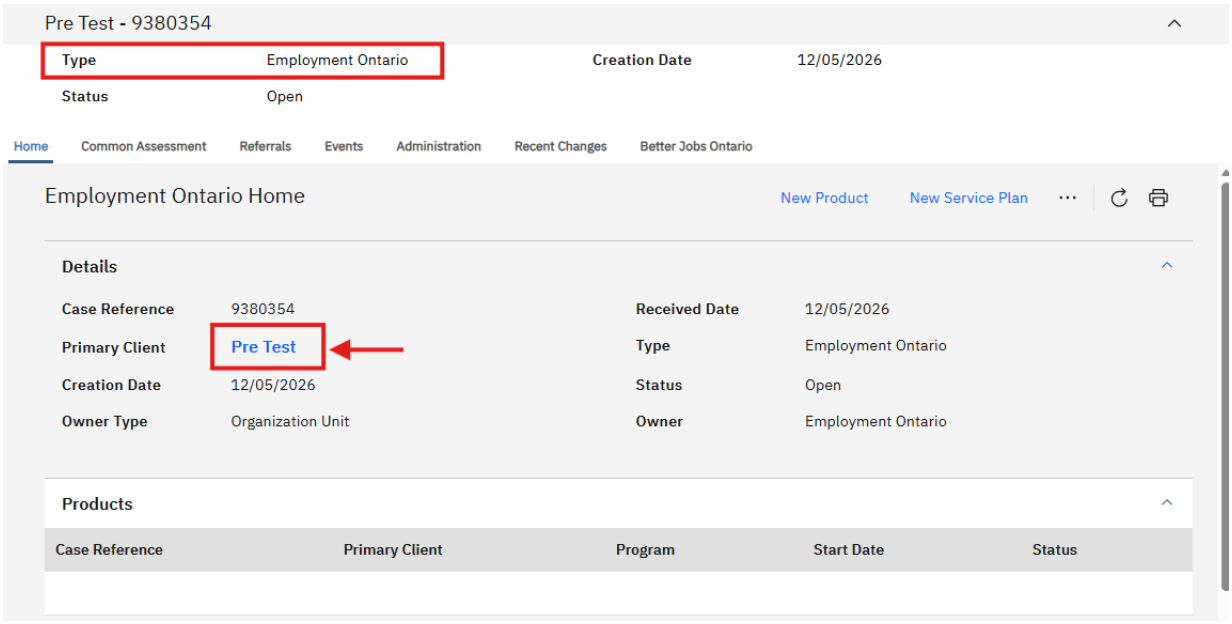
Modify Client Profile

The system allows the user to modify client data at any time and view changes in the client's history section. The client's history section keeps a history log of specific changes made to the client's member home page.

System Steps

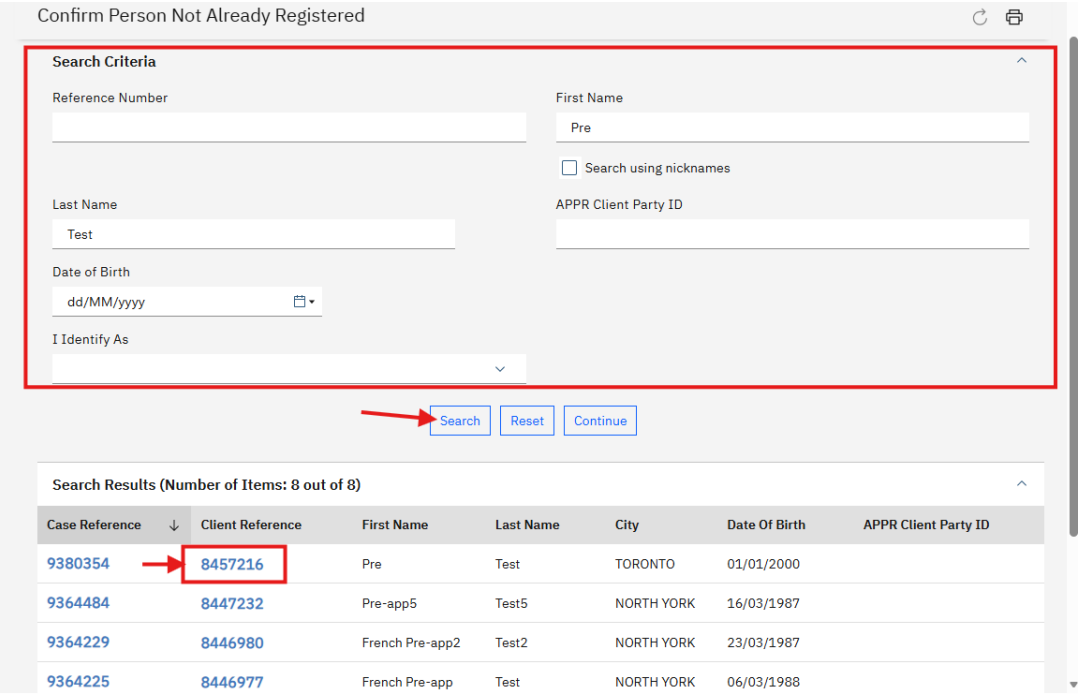
Step 1: Employment Ontario Home Page

Click on the CLIENT'S NAME located in the Details information panel.



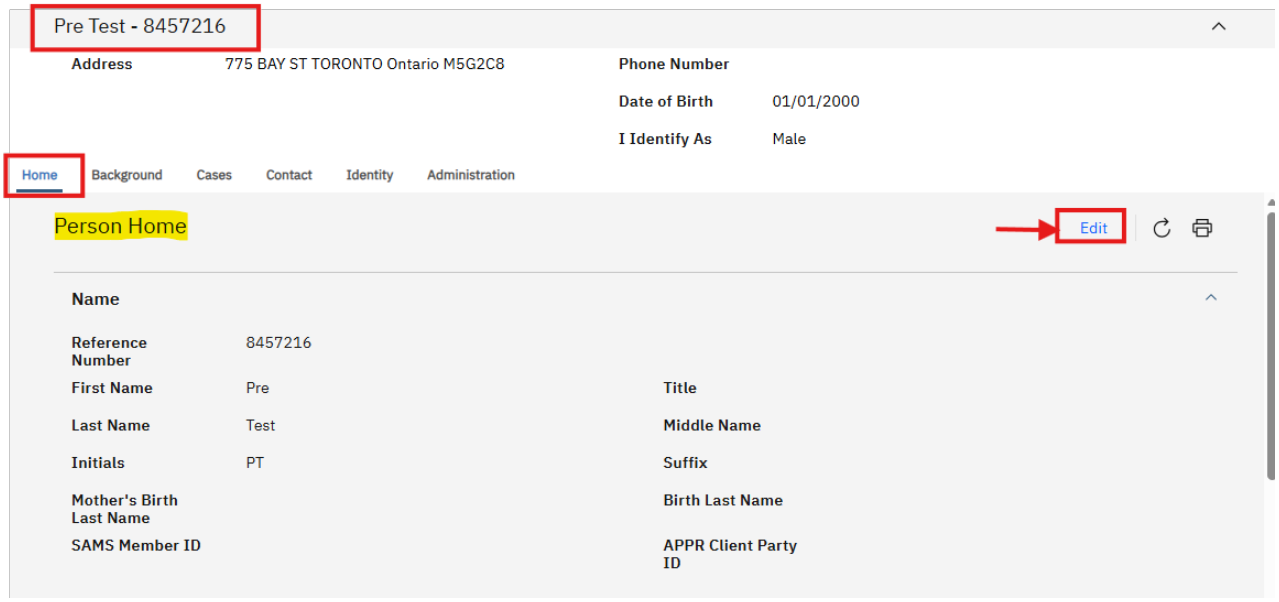
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Or Search for the client by clicking **Register a Person** from Workspace



Step 2: Person Home Page

The client's Person Home page appears in a new page. The client reference number is displayed in the page header as well as in the **Name** information panel. Click **EDIT** to modify the client's profile, then **Save** once completed.

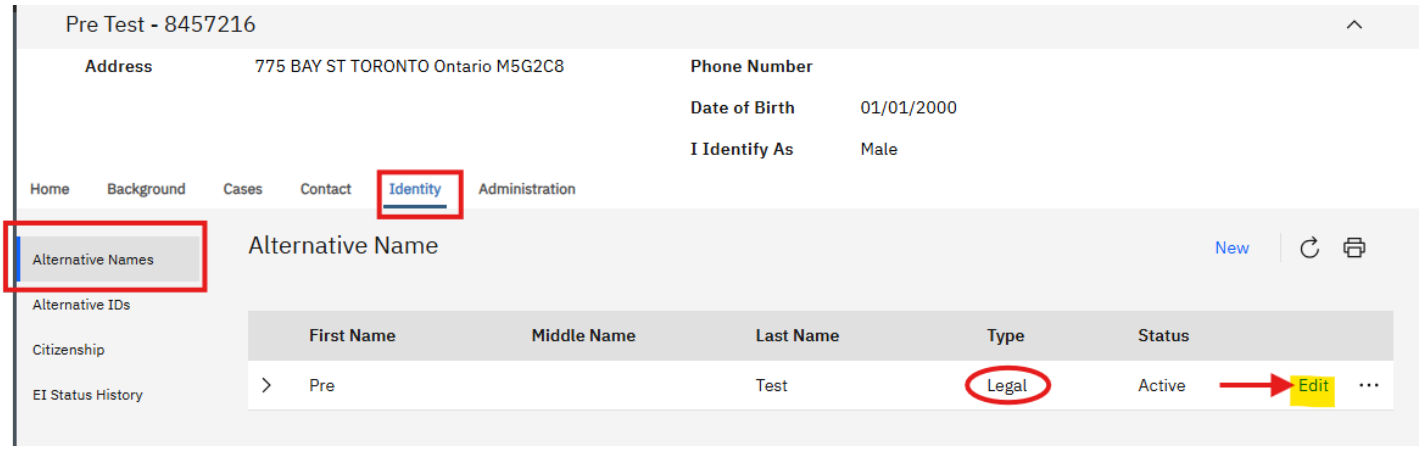


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If the client's name needs to be changed as a result of a data entry error, the changes can be made from the edit feature. If the client has legally changed their name, follow the alternative name procedure which is under the **Identity** tab (**Step 3: Update Alternative names**).

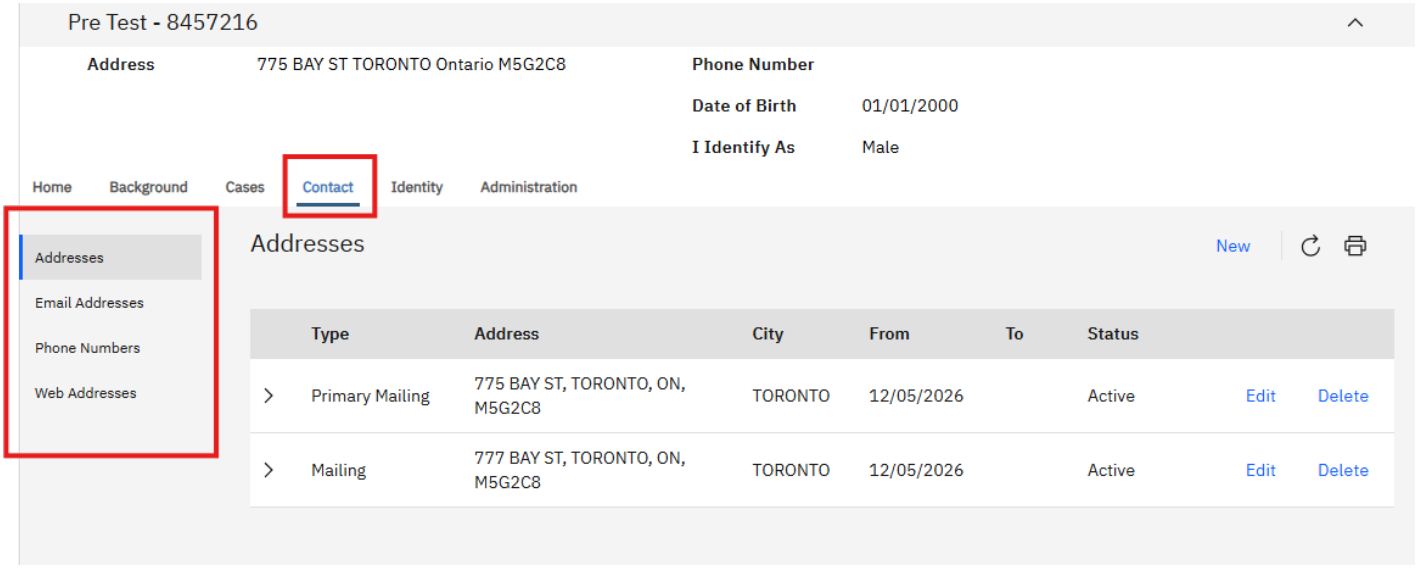
Step 3: Update Alternative names

The client's Alternative names (Legal and preferred) can be added or updated under the **Identity** page.



Step 4: Update additional information.

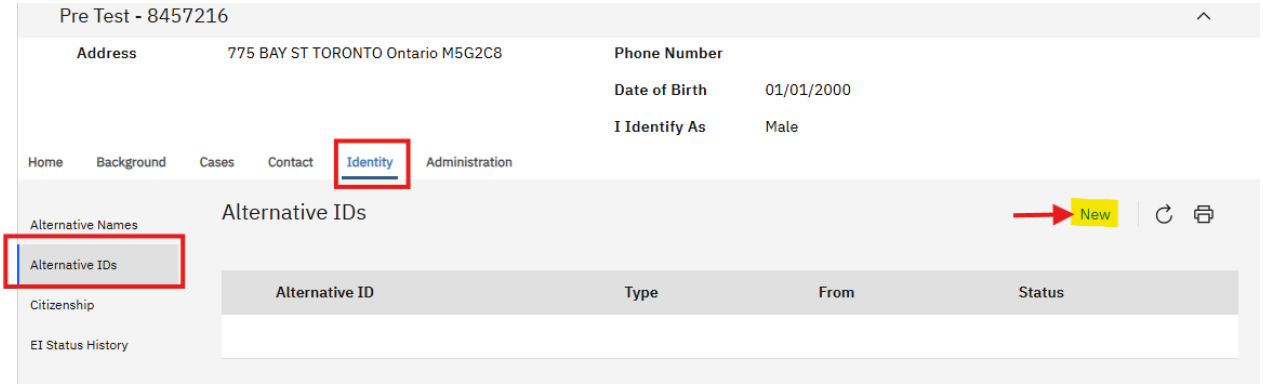
The client's additional contact information such as Addresses, email or phone numbers can be updated under the **Contact** page.

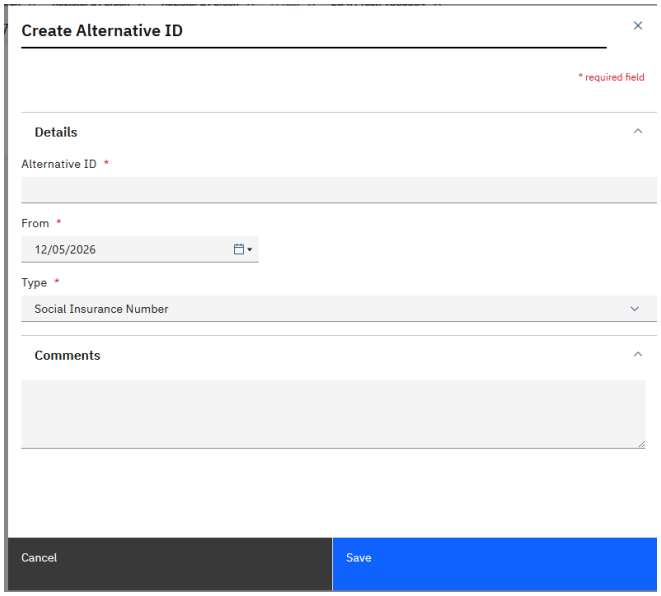


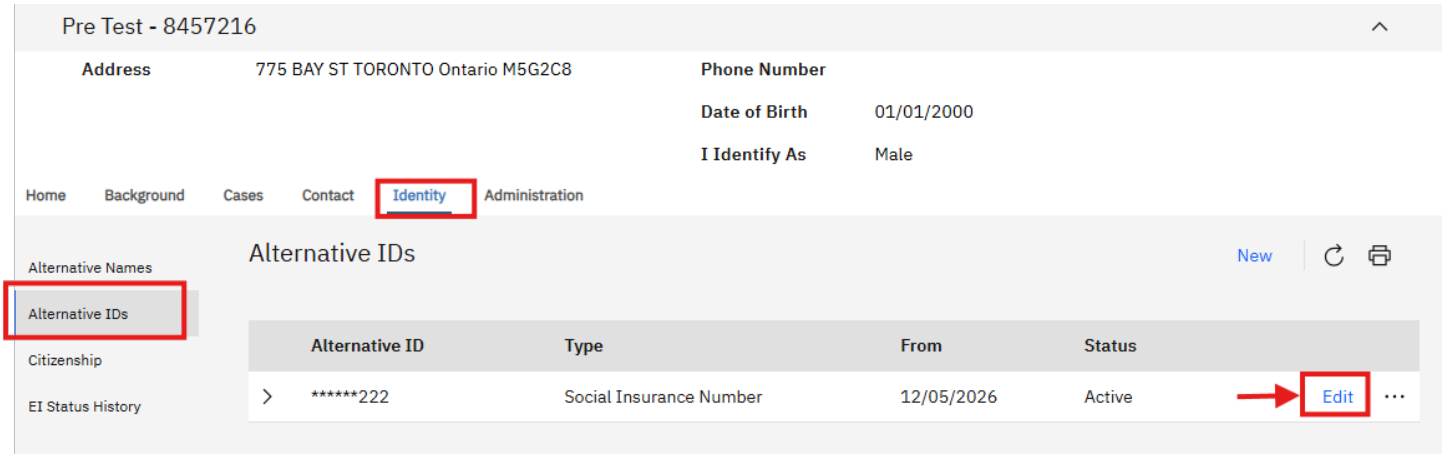
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Step 5: Update/Add SIN information.

The client's SIN number can be added or updated under the **Identity** page.







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Pre-App Service Plan

The Pre-Apprenticeship Training Program supports the Skilled Trades Strategy by encouraging new entrants to participate in technical and employability training needed to be job-ready at no cost, while addressing skilled trade shortages in high-demand trades.

The primary purpose of a service plan is to support a participant in achieving a specific goal. Generally, this goal is divided into smaller steps, known as components, within Pre-Apprenticeship service plans. Completion of these components helps participants progress toward the overall objective.

Service Providers (Caseworkers/Managers/Administrators) will use EOIS CaMS to:

- Create and maintain participant service plans.
- Record participant outcomes at case (service plan) closure
- Monitor all client activities
- Identifying any instances where the client fails to meet the required objectives.

This allows the service provider to evaluate the effectiveness of both the client and the overall service plan.

Clients' Eligibility Criteria

Clients must meet the following requirements:

- Be at least 16 years of age.
- Be legally eligible to work in Ontario.

Clients under 18 years of age must have an Ontario Secondary School Diploma (OSSD) or an equivalent credential.

Program Streams

The Pre-Apprenticeship Service Plan is delivered through two distinct project streams. Each stream is designed to support individuals in preparing for a career in the skilled trades, with different levels of training and exposure.

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Stream 1: Year 1 Ready Stream

Projects delivered under the Year 1 Ready Stream are intended for participants who are prepared to begin formal apprenticeship training. These projects must include mandatory program requirements, such as:

1) One or more work placement
2) Health and Safety Training
3) Secondary Trade Training
4) Registration in, and successful completion of, Level 1 In-Class Training – Primary Trade Training
    a) Training must be in the primary trade taught
    b) Training must be delivered by a Ministry-approved Training Delivery Agent (TDA)

This stream supports participants to become job-ready and apprenticeship-ready by the end of the program.

Stream 2: Try a Trade Stream

Projects delivered under the Try a Trade Stream are designed for individuals who want to explore careers in the skilled trades before committing to a specific apprenticeship pathway. These projects must include mandatory program requirements, such as:

1) One or more work placement
2) Health and Safety Training
3) Primary Trade Training
4) Secondary Trade Training

This stream allows participants to make informed decisions about their interest in the skilled trades and potential apprenticeship pathways.

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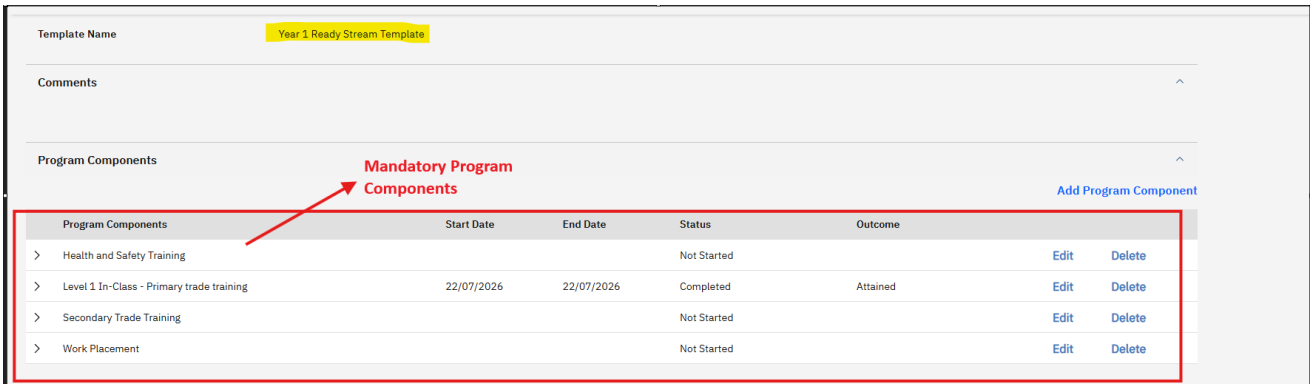
Components

The Year 1 Ready Stream and Trade Stream programs are structured service pathways that include a combination of mandatory requirements and additional activities designed to support participant progression, skills development, and employment readiness.

Each program stream includes defined components such as training, work placements, and additional support, with details like trade codes (TOSS/Trade), employer information (where applicable), and outcomes. Participants may complete multiple components based on their individual goals.

Stream 1: Year 1 Ready Stream

Mandatory Program Requirements - The Year 1 Ready Stream includes the following required components:

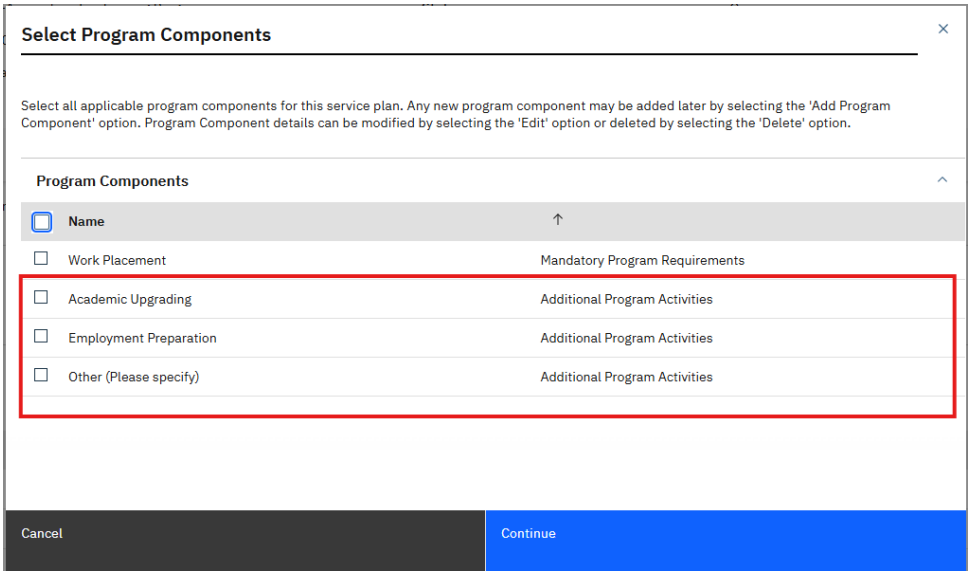


- Health and Safety Training
- Level 1 In-Class Training – Primary Trade Training (Pass/Fail selection required)
- Secondary Trade Training (TOSS/ Trade codes and names required; Multiple TOSS/Trade codes can be added)
- Work Placement
    - Employer Name
    - Outcome
    - Actual Start Date
    - Actual End Date
    - Number of hours (per week)
    - Pay rate (per hour) (mandatory – must include amount)

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- TOSS/ Trade codes and names

Additional Program Activities - The following optional components may also be included:

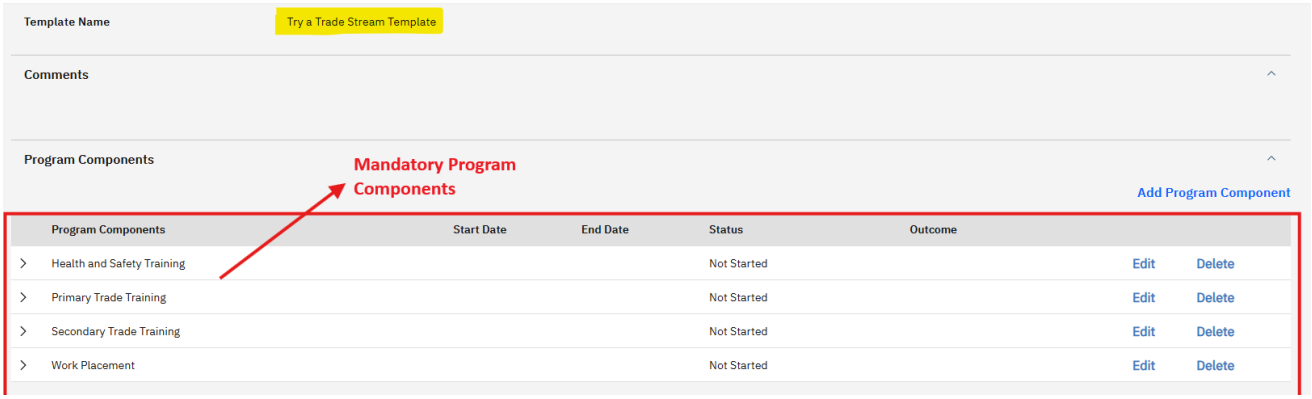


- Academic Upgrading
- Employment Preparation
  - Types include Job Search, Interview Skills, Workplace Tours, or Other (specify in comments)
- Other (Please Specify) (Note: User-defined; multiple entries allowed, and details must be entered manually)

Stream 2: Try a Trade Stream

Mandatory Program Requirements - The Trade Stream includes the following required components:

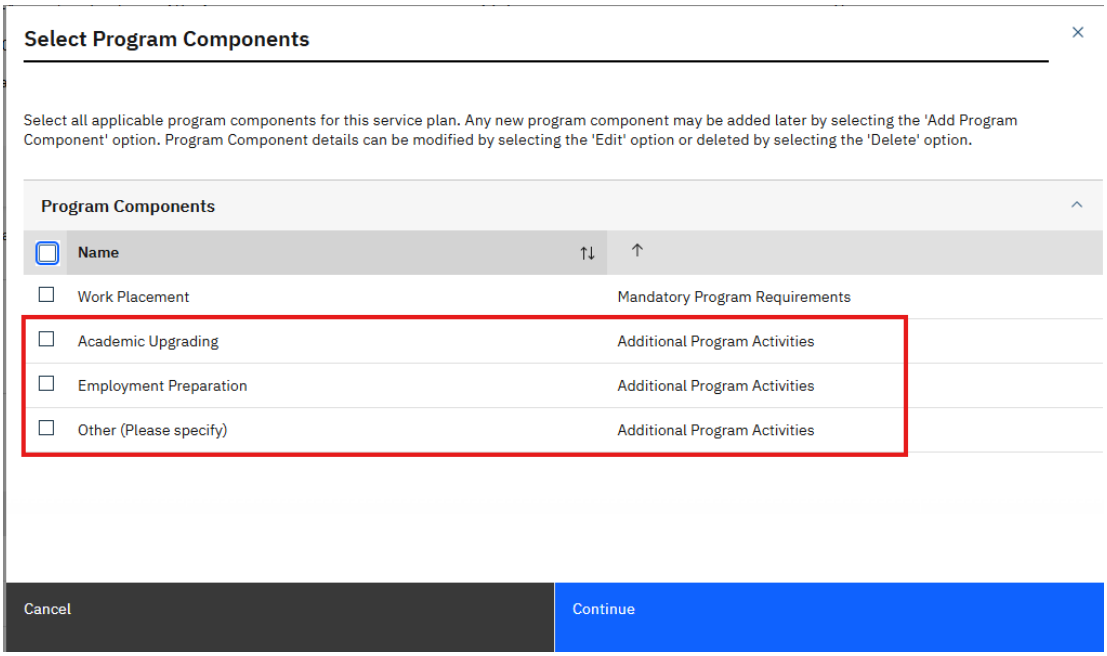
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- Health and Safety Training
- Primary Trade Training (TOSS/ Trade codes and names required)
- Secondary Trade Training (TOSS/ Trade codes and names required; Multiple TOSS/Trade codes can be added)
- Work Placement
    - Employer Name
    - Outcome
    - Actual Start Date
    - Actual End Date
    - Number of hours (per week)
    - Pay rate (per hour) (mandatory – must include amount)
    - TOSS/ Trade codes and names

Additional Program Activities - The following optional components may also be included:

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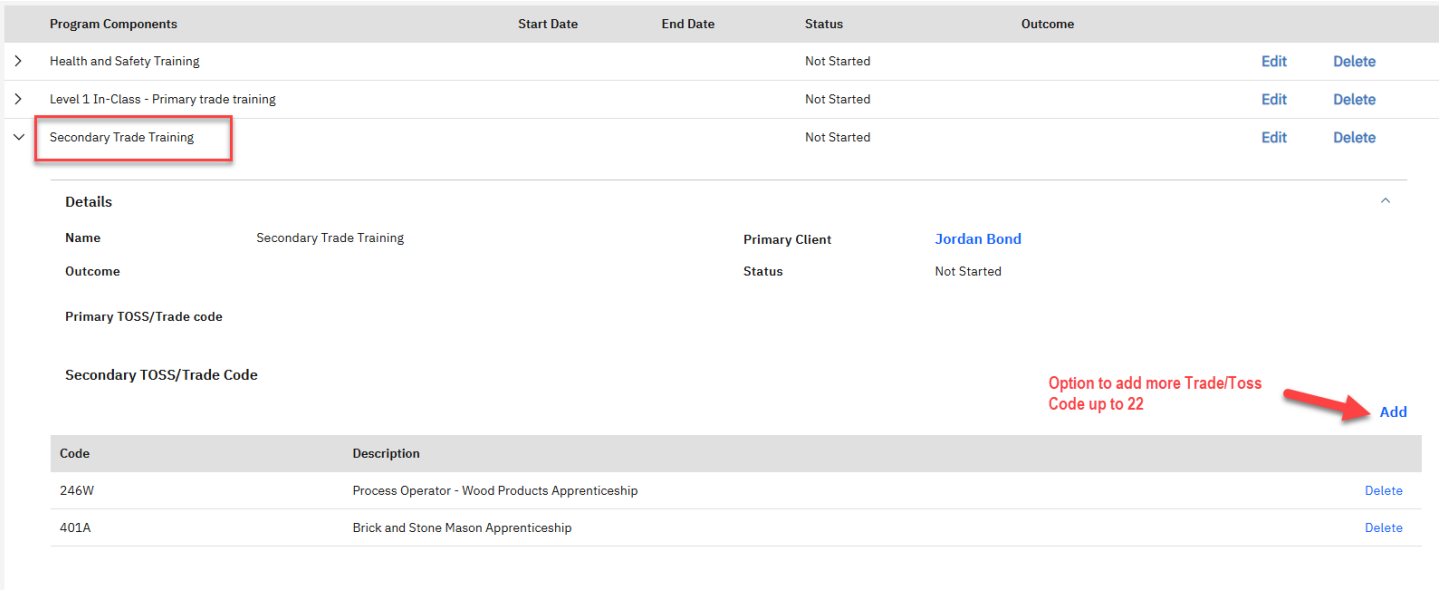


- Academic Upgrading
- Employment Preparation
    - Types include Job Search, Interview Skills, Workplace Tours, or Other (specify in comments)
- Other (Please Specify) (Note: User-defined; multiple entries allowed, and details must be entered manually)

The system supports adding multiple TOSS/Trade codes under Secondary Trade Training for both streams (Year 1 Ready and Try a Trade). A maximum of 22 TOSS/Trade Codes can be added.

To add additional TOSS/Trade Codes, first enter your primary TOSS/Code. Once it has been added, use the Add link in the Summary panel to add additional TOSS/Trade codes. See screenshot below.

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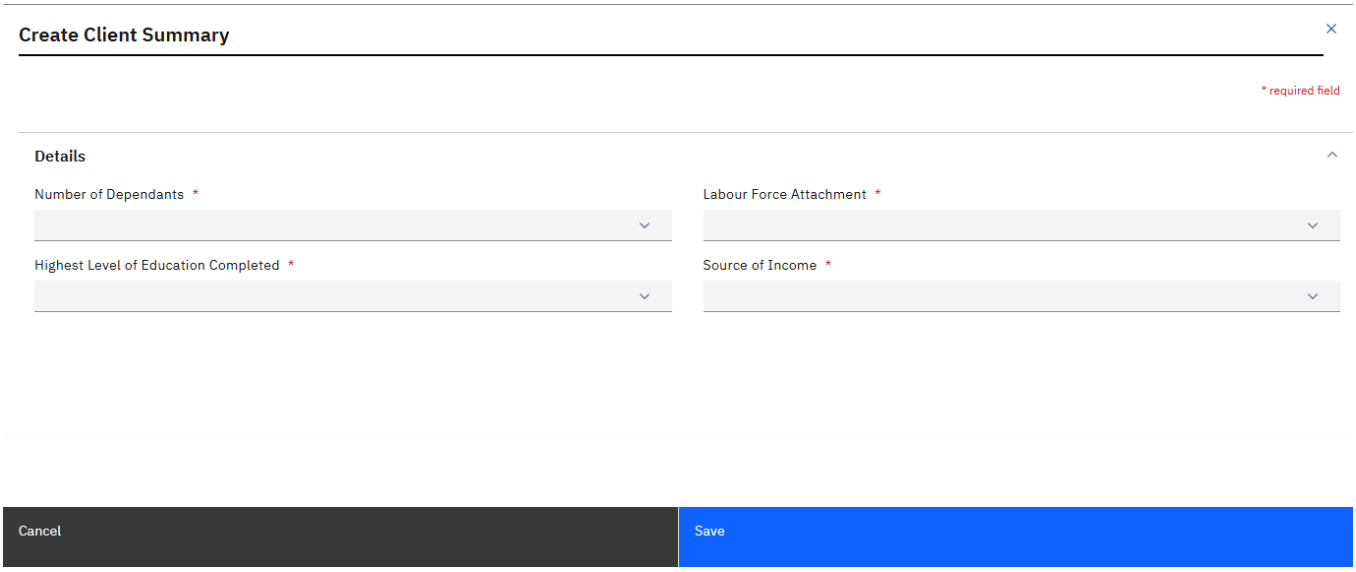
Client Summary

A Client Summary is mandatory component of Pre-app service plan, outlining the client details and support provided. It provides an overview of the client employment profile, showing client abilities and barriers.

Client Summary has one section: **Details**

The **Details** section of the Client Summary must be completed before a case can be activated. This section has 4 questions that gather client's information about the employment profile.

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A detailed explanation of the terminology employed in the questions is provided below.

Dependents: A dependent child is defined as an individual who lives in the same household as the participant, and for whom they have caregiving responsibilities. The dependent may be a child by birth, marriage, ado**ption, a foster child, or an adult dependent (e.g. a child with a disability that has reached legal age). For those i**ndividuals who do not feel comfortable providing this information, use the Prefer not to report option.

Highest level of Education: Highest level of education is the highest level of schooling individual has completed.

Labour Force Attachment: Labour Force Attachment refers to the employment status that best describes an individual's situation prior to starting the components (Pre-App).

Source of income: Source of income refers to individual income as opposed to household income. Clients should select OW or ODSP if they have either currently applied to or are currently receiving OW or ODSP. Clients on Crown Ward Extended Care and Maintenance should select Crown Ward.

Building a Pre-App Service Plan

The successful creation of a Pre-App service plan requires the following steps to be performed in sequence and will be explained in this section.

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1. Create a Client Profile or use an existing client profile.
2. Create a Pre-app Service Plan.
3. Pre-App Service Plan will display mandatory components in the Components section.
4. Add any additional components, if required.
5. Add a Client Summary. (Note: Once the client summary is added, the service plan status automatically changes to Active.)
6. Add Financial support.
7. Modify Components as required.
8. Modify Client Summary as required.
9. Close the Pre-App Service Plan.

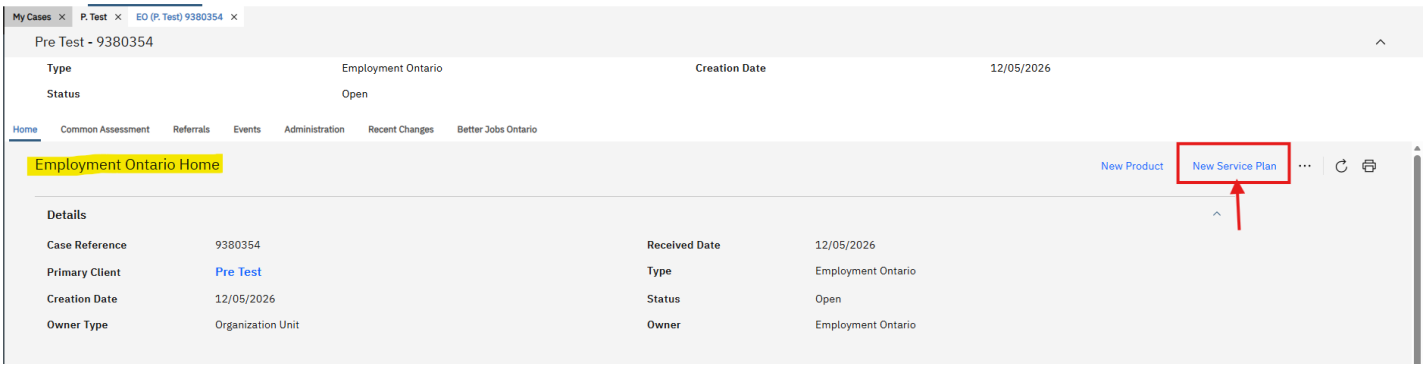
Creating a Pre-App Service Plan

Prerequisite:

- The Employment Ontario Case must exist to create a service plan for a client. It is created once a client profile has been created in CaMS. if one does not exist, refer to Section "How to create an Employment Ontario Case."
- A Social Insurance Number, Email address and Phone number must be entered to the client profile before a Pre-app service plan can be created.

System Steps

Step 1: Employment Ontario Home Page Click NEW SERVICE PLAN Button.



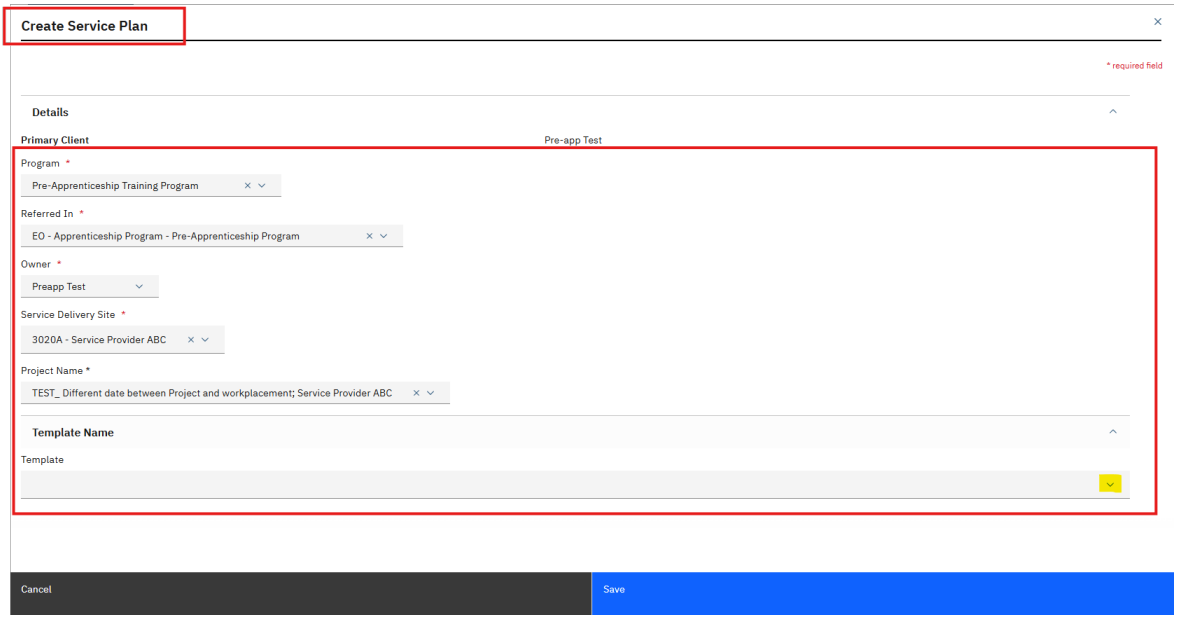
© King's Printer for Ontario, 2026.



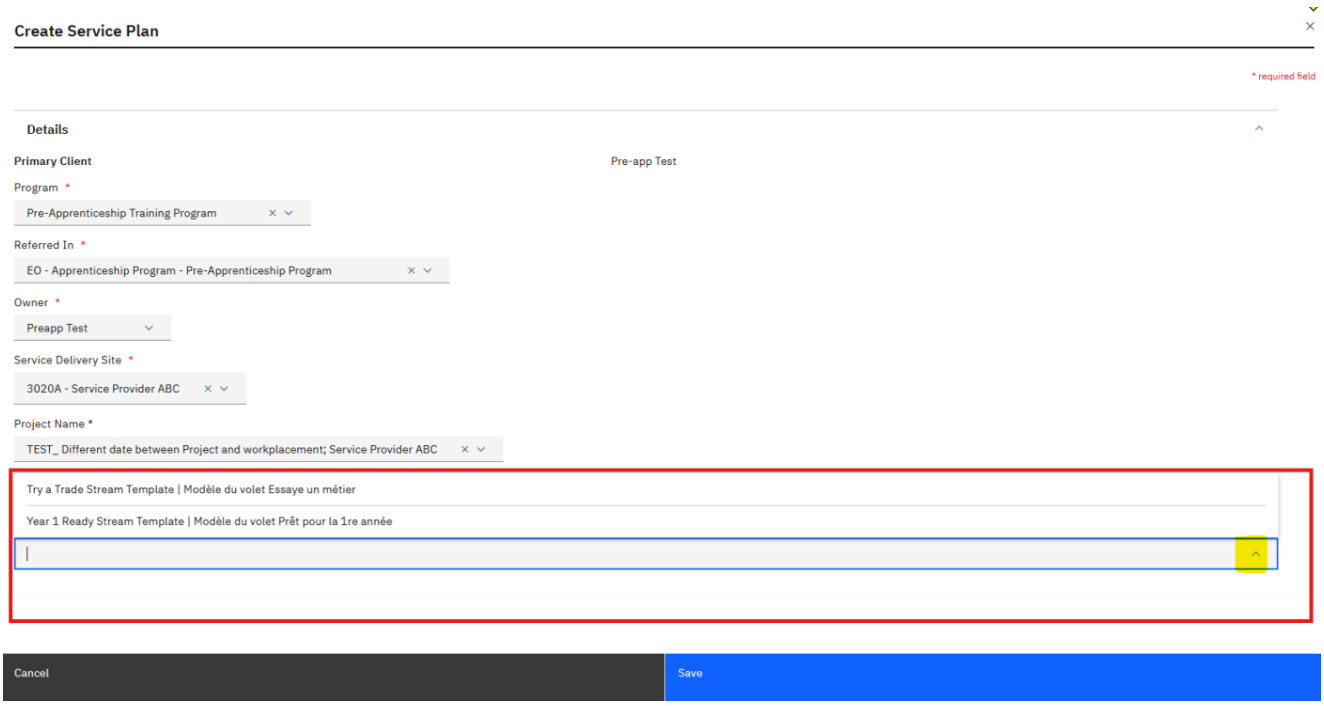
System will prevent the user from creating a service plan if the client is deceased and the date of death has been recorded.

Step 2: Create Service Plan Page

Select the drop-down menu on the right and select the appropriate response for each field. Some of the fields may automatically populate if there are the only response available. For **Service Delivery Site, o**nly Service Delivery Sites offering Pre-App program will appear in the list.



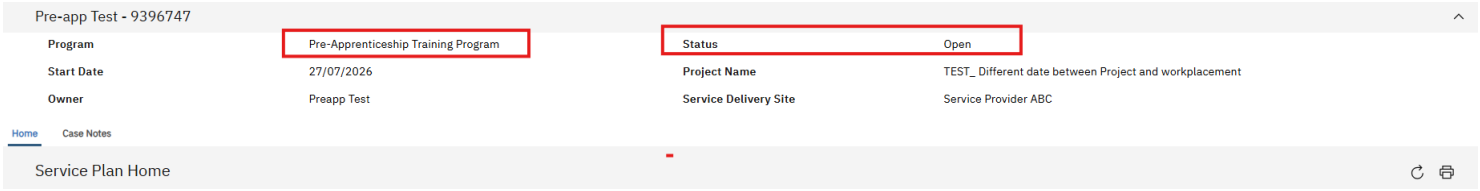
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Step 3: Service Plan Home Page.

Once a Pre-App Service Plan has been created the status will be set to “Open”; this appears on the Service Plan Home page. A Service plan can have three statuses: Open, Active, Closed.

For a detailed description of status definitions, refer to Appendix 1



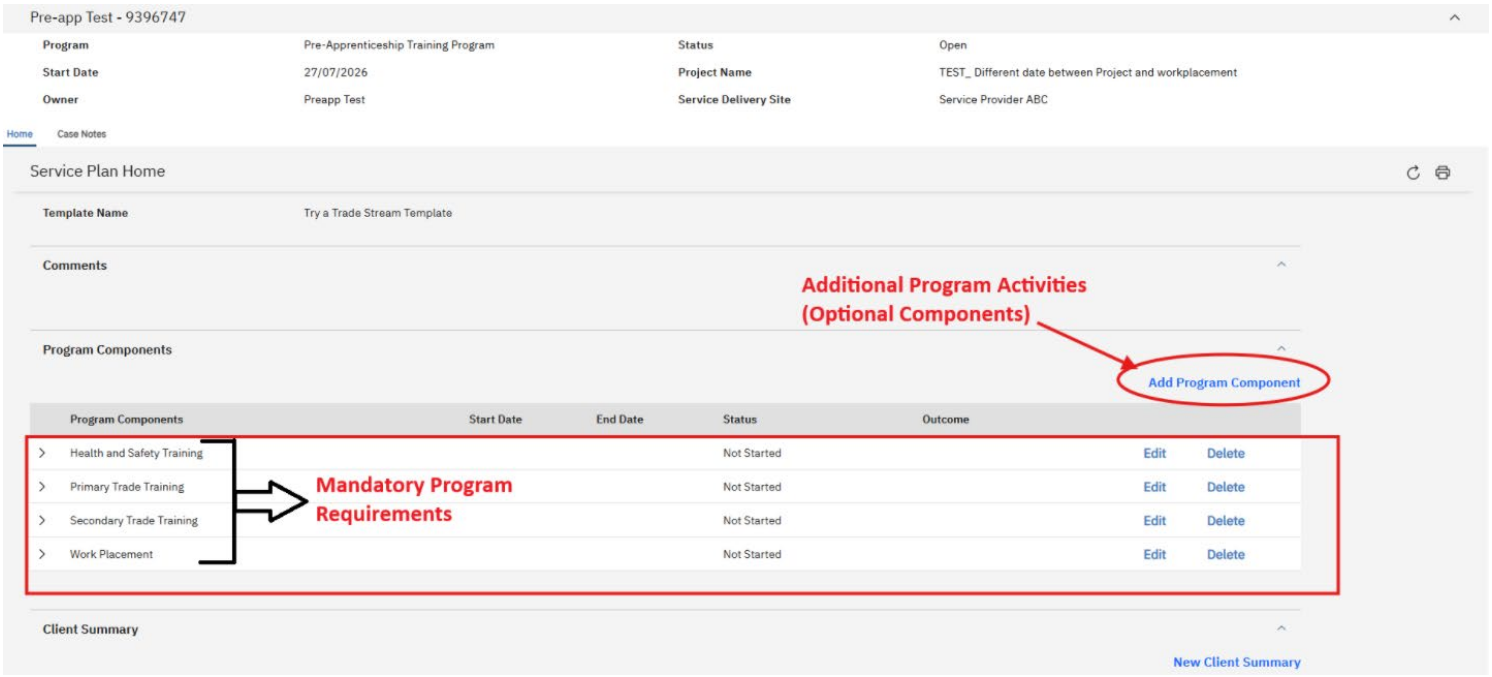
Adding Components

Step 1: Service Plan Home Page

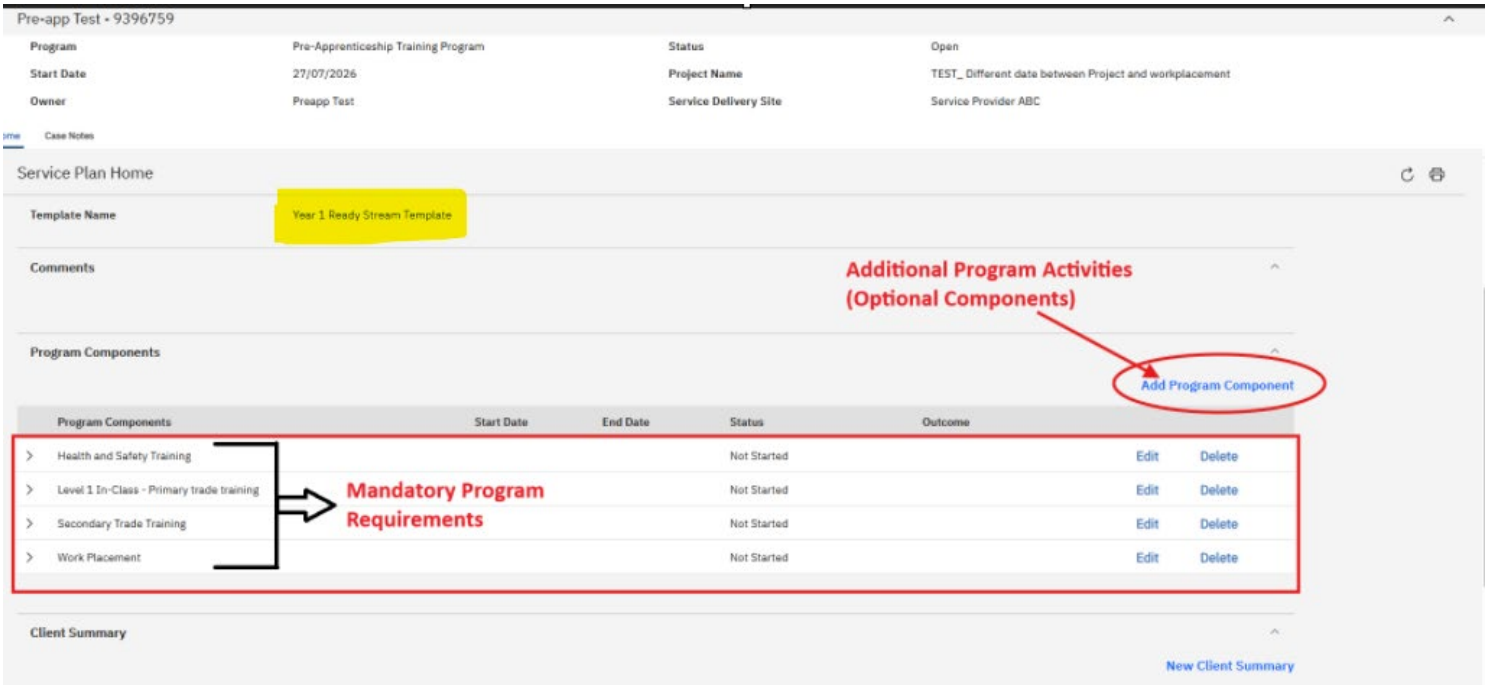
Pre-App Service Plan will display mandatory components in the Program Components section. Click on ADD PROGRAM COMPONENT and select the checkbox(es) next to the relevant **Component(s)** for this service plan and click CONTINUE to Add any additional components, if required.

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Try a Trade Stream Template



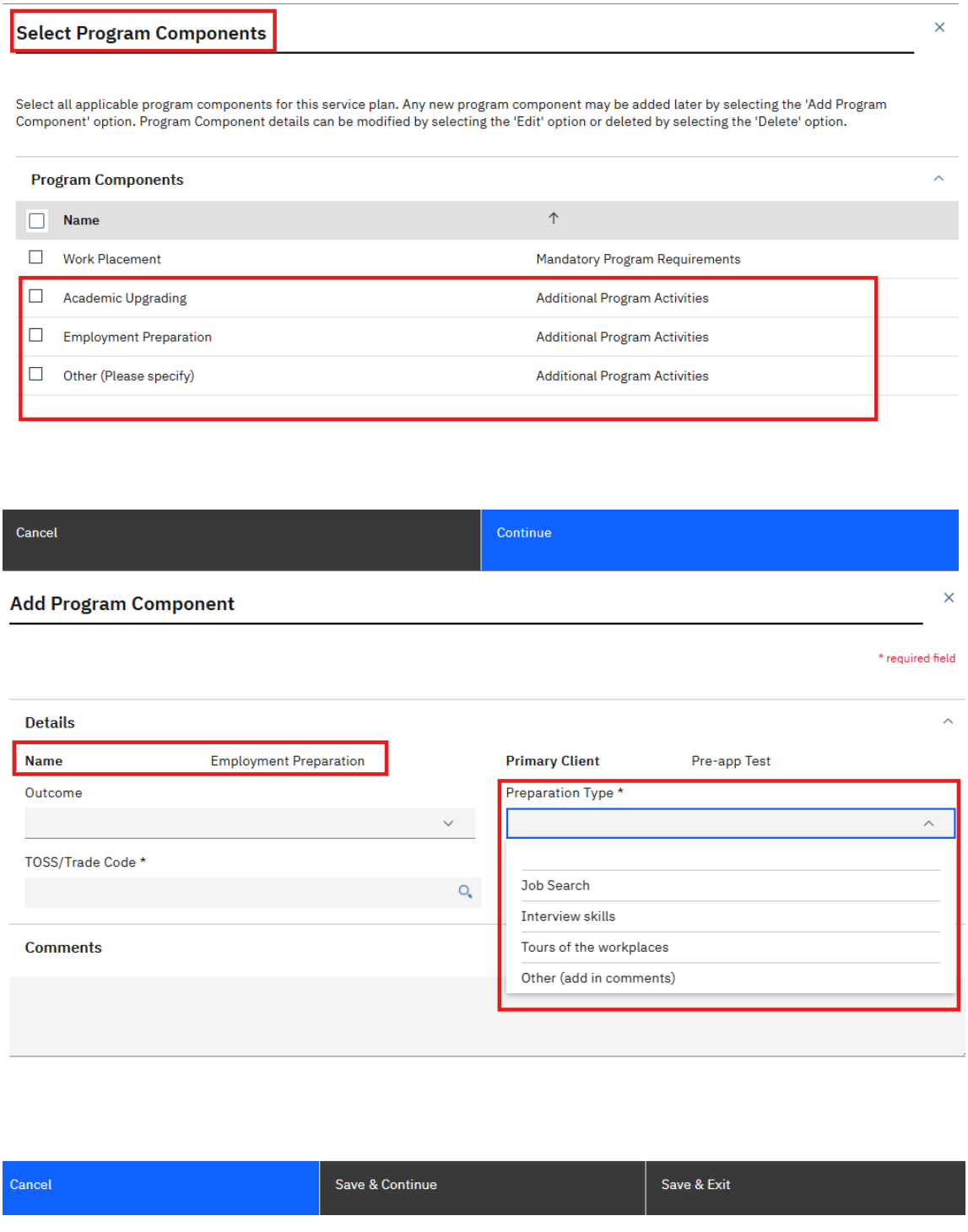
Year 1 Ready Stream Template



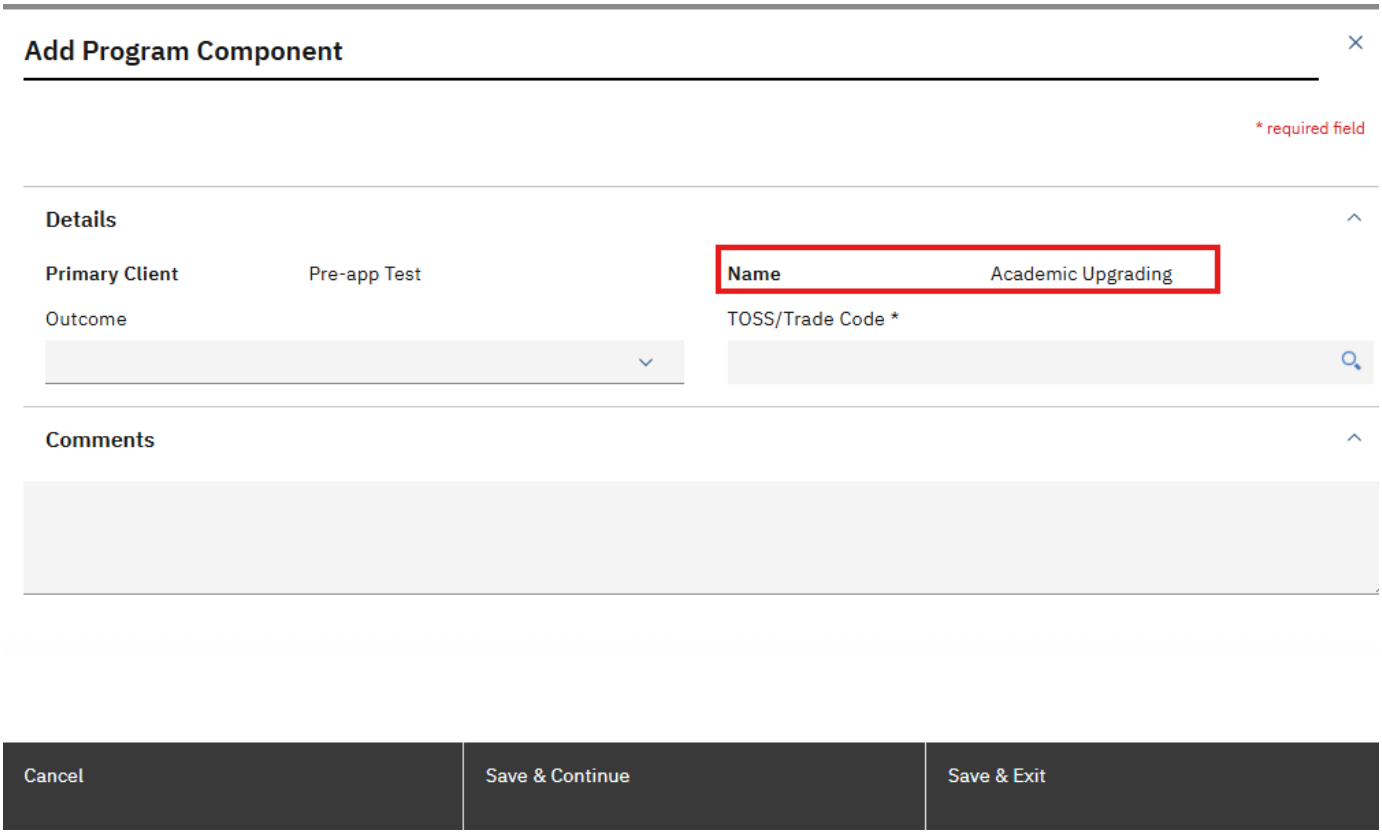
© King's Printer for Ontario, 2026.

Step 2: Add Program Components page.

Add Program Components details for each additional Components. Complete fields as necessary.



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Add Program Component page will open.

Outcome is a mandatory field**. C**lick the drop-down menu next to it and select the appropriate value.

Click SAVE & CONTINUE if you have chosen more than one Component.

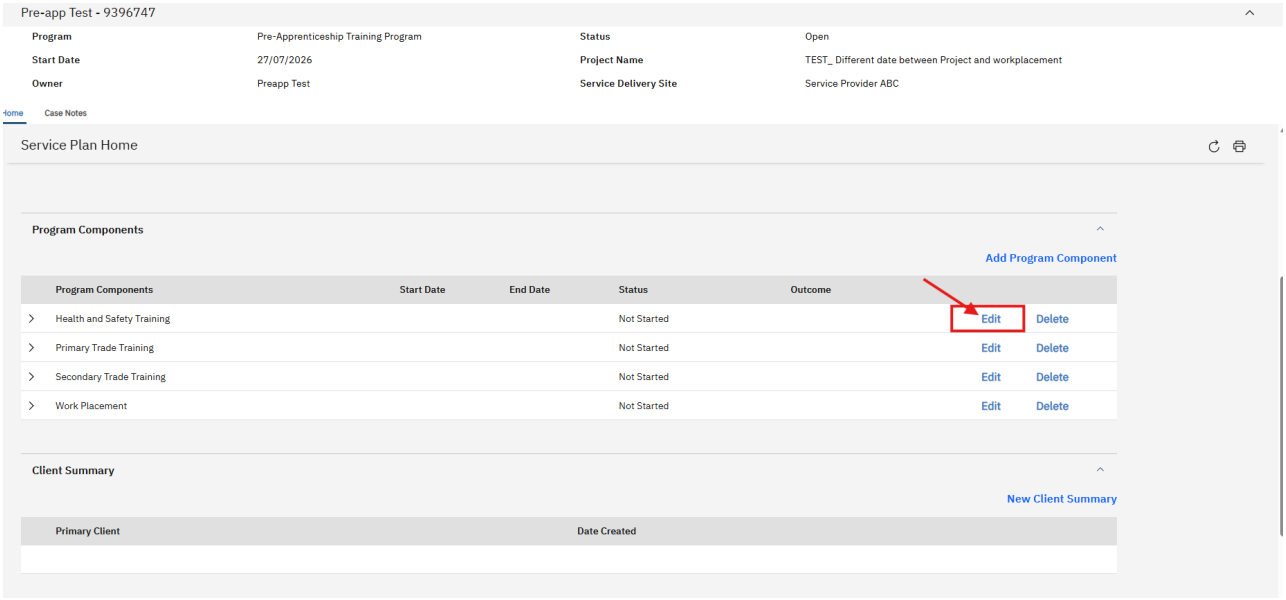
Click SAVE & EXIT if you would have one (1) Component selected or if you would like to exit after entering details of the first Component.

Modify or Complete Components

Step 1: Service Plan Main Page

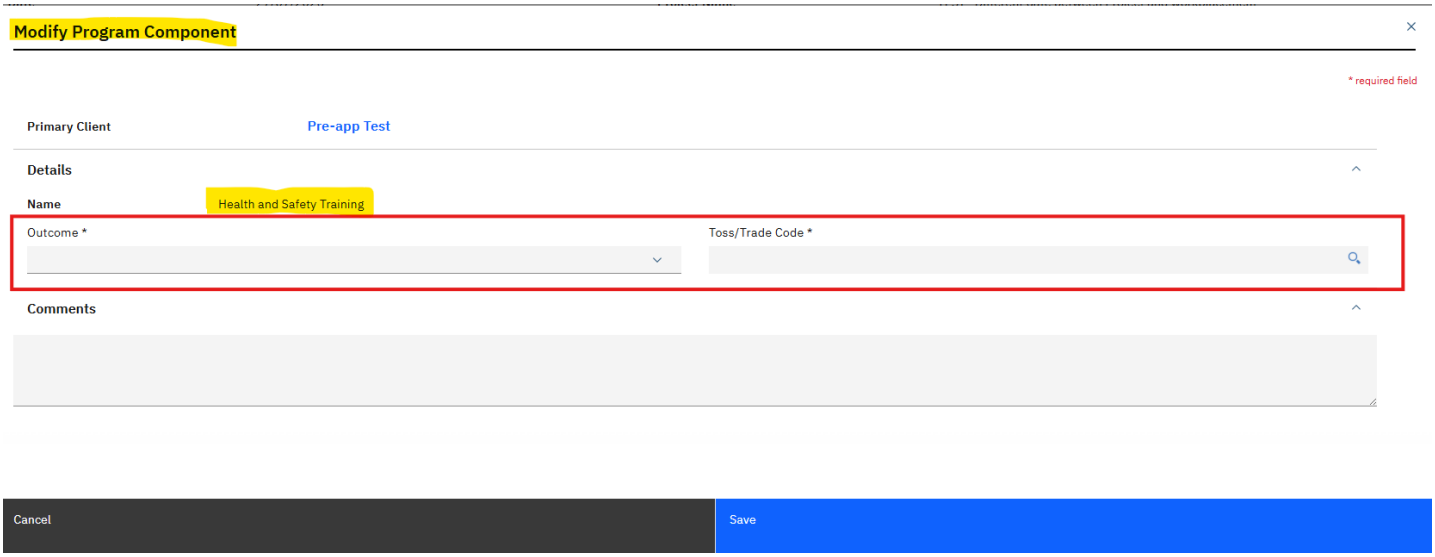
Under Program Components section, click EDIT next to the relevant Component.

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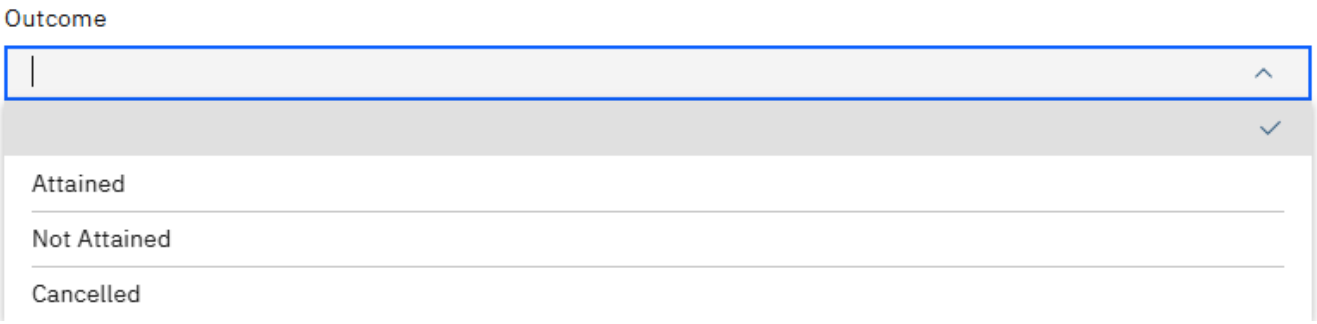
Step 2: Modify Program Component

Modify Program Component page will appear. Modify Component details as needed.



For Outcome, click the drop-down menu and select the appropriate value.

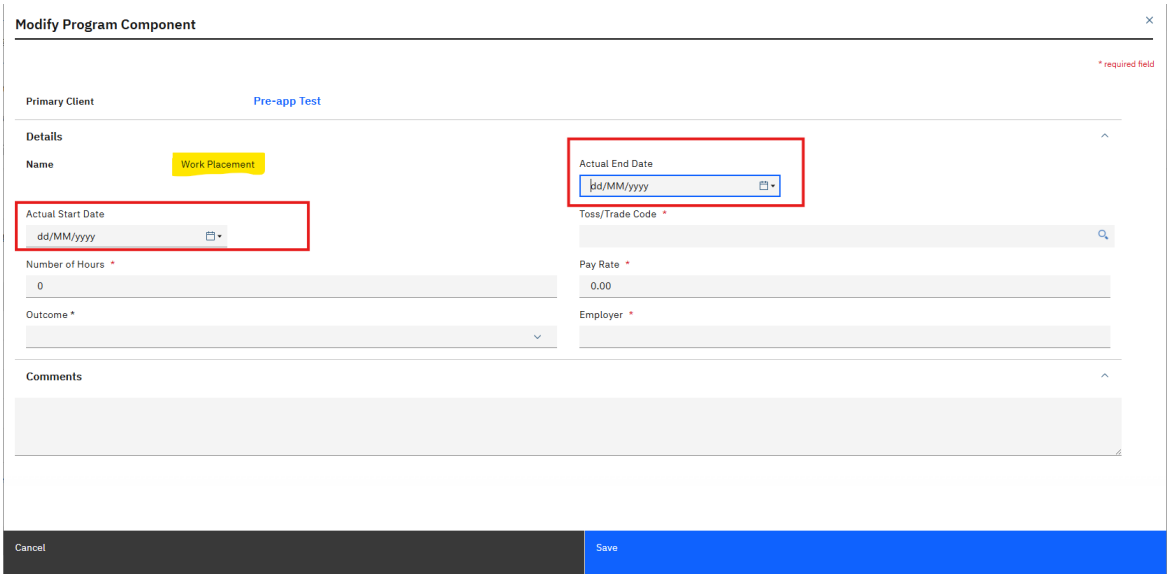
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If the Outcome is recorded as Attained or Not Attained, both the Actual Start Date and Actual End Date must be entered for the mandatory program components under the applicable stream template listed below.

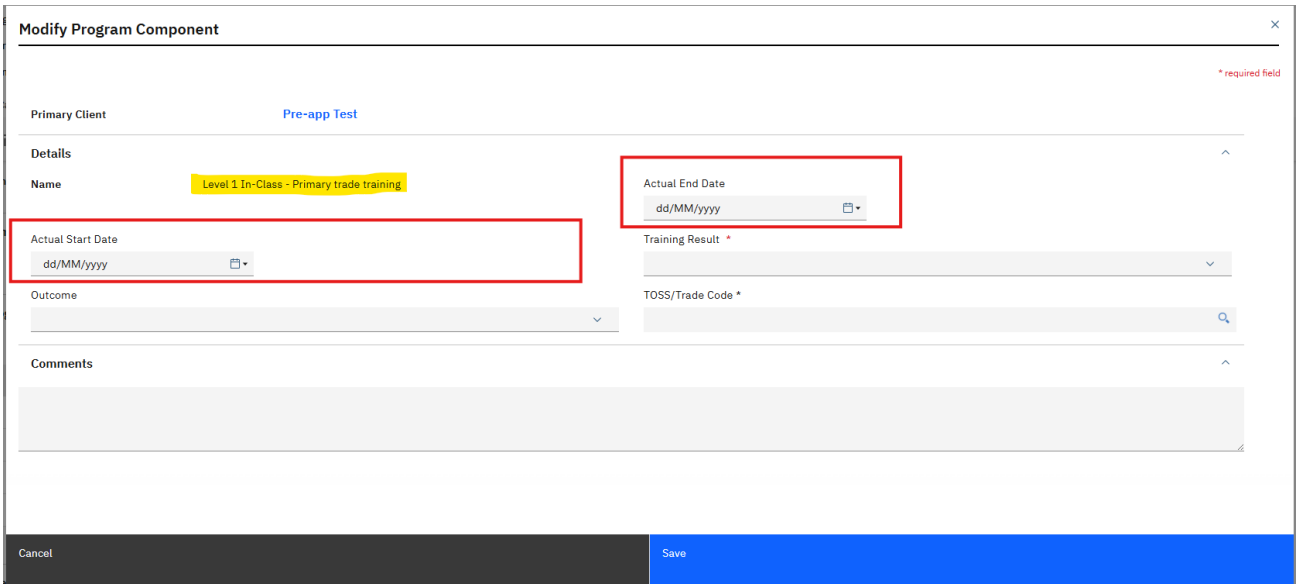
If the Outcome has not yet been determined, the Outcome field may be left blank; in this case, the Actual Start Date and Actual End Date must also remain blank.

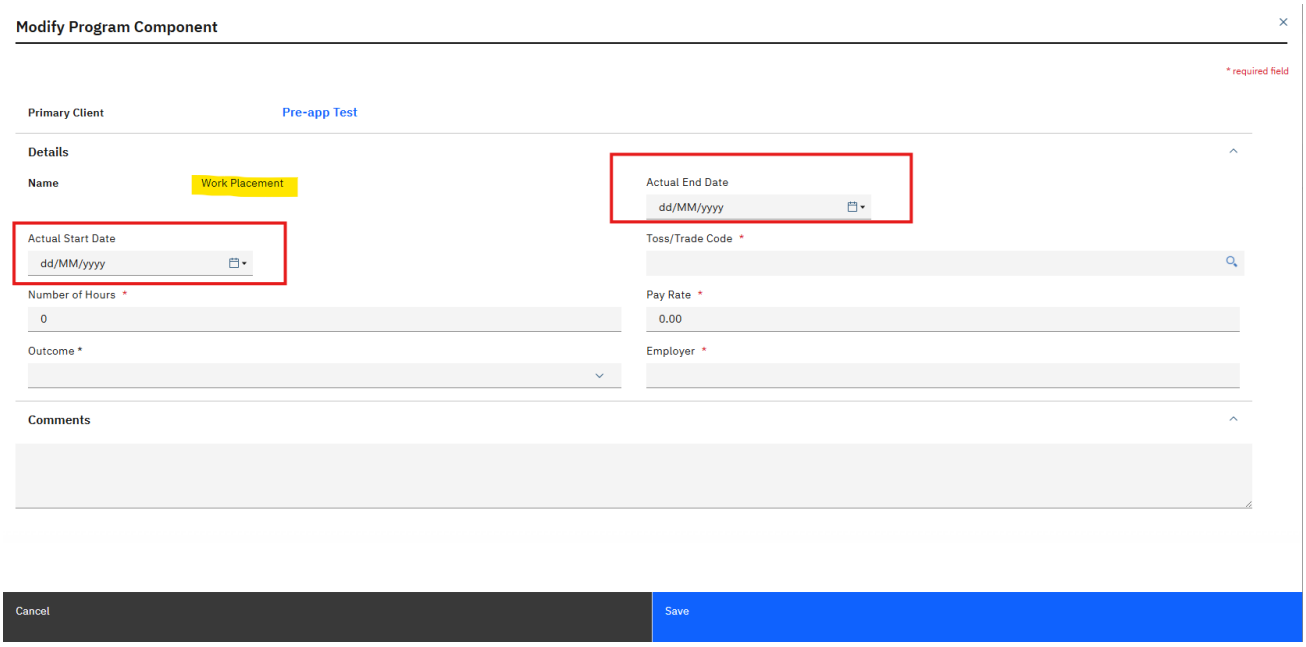
- **Try a Trade** stream template
    - Mandatory Component: Work Placement



- Year 1 Ready stream template
    - Level 1 In-Class – Primary Trade Training
    - Work Placement

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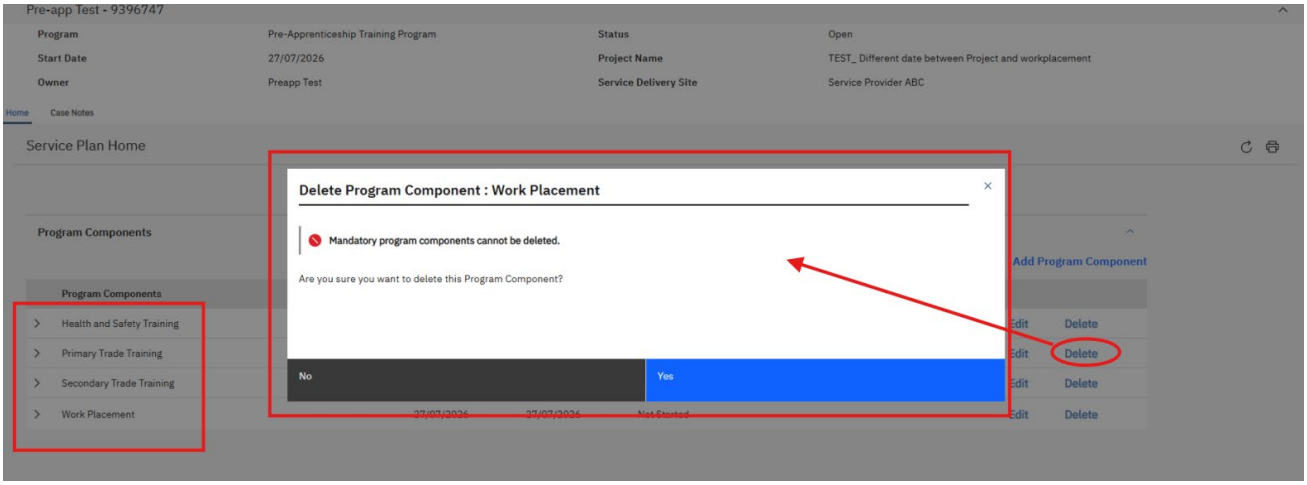
Outcome can be recorded as Cancelled if the component is no longer applicable. The Cancelled outcome can only be used for additional program activities (optional components) and is not permitted for mandatory components within a stream template.

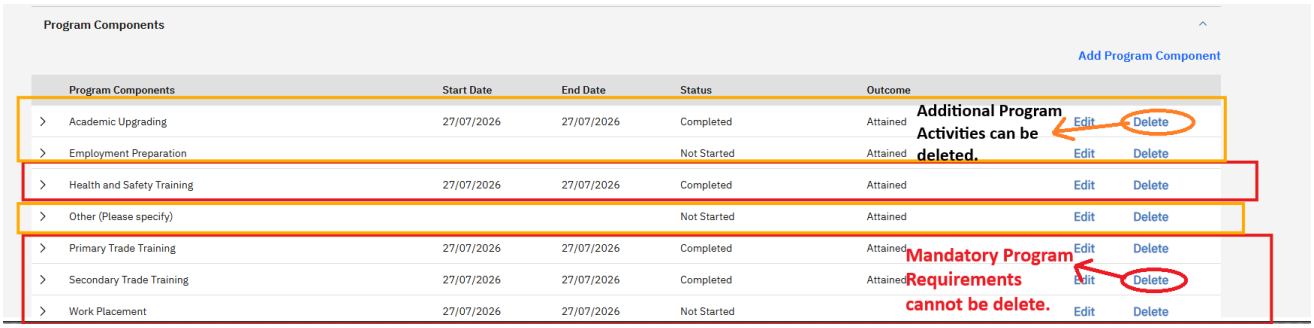
© King's Printer for Ontario, 2026.

Existing Mandatory and Additional Components can be edited as needed if the service plan is not closed.

Delete Components

Mandatory Components cannot be deleted.



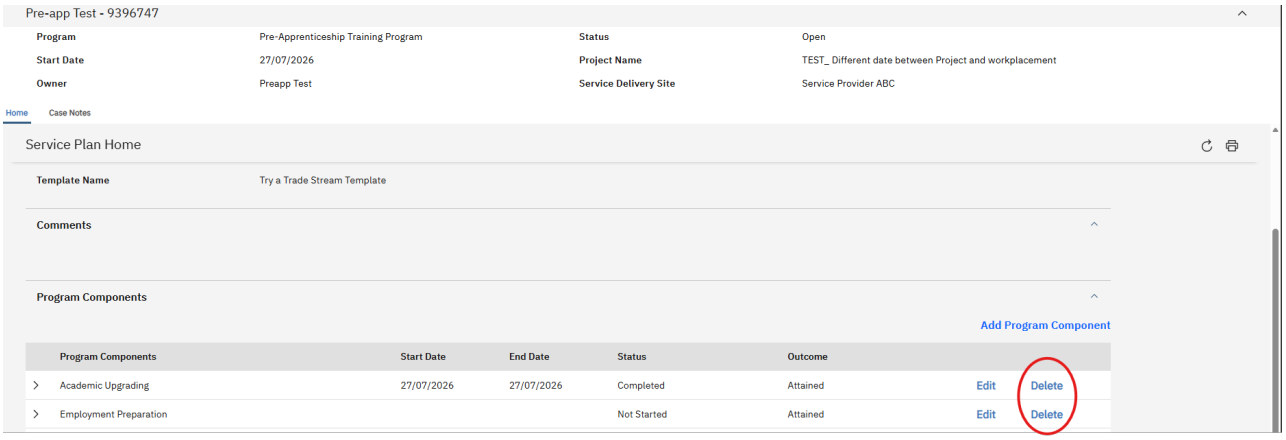


Additional Components can be deleted as needed if the service plan is not closed.

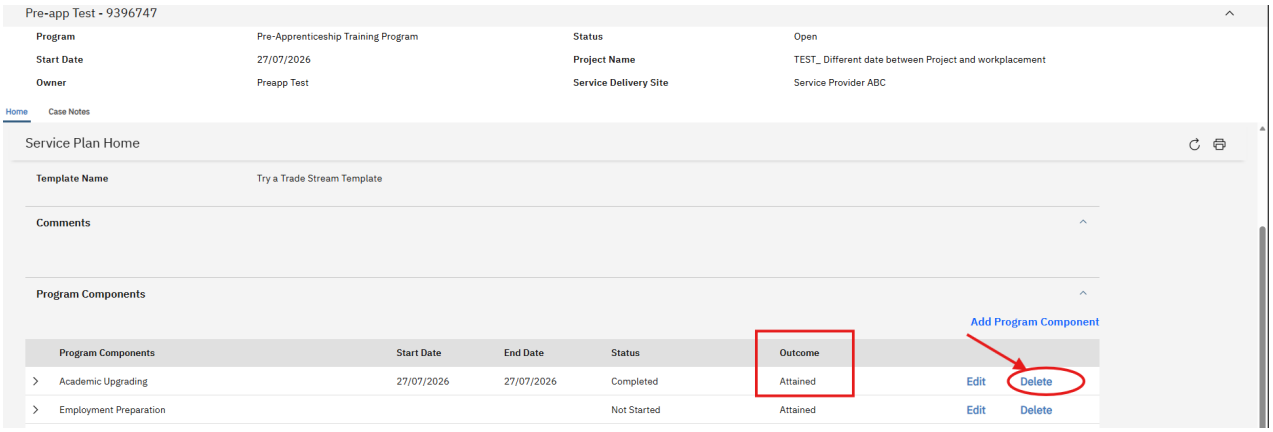
Step 1: Delete Additional Component

From the main page of a Pre-App Service Plan, Under Program Components, click DELETE next to the relevant Component.

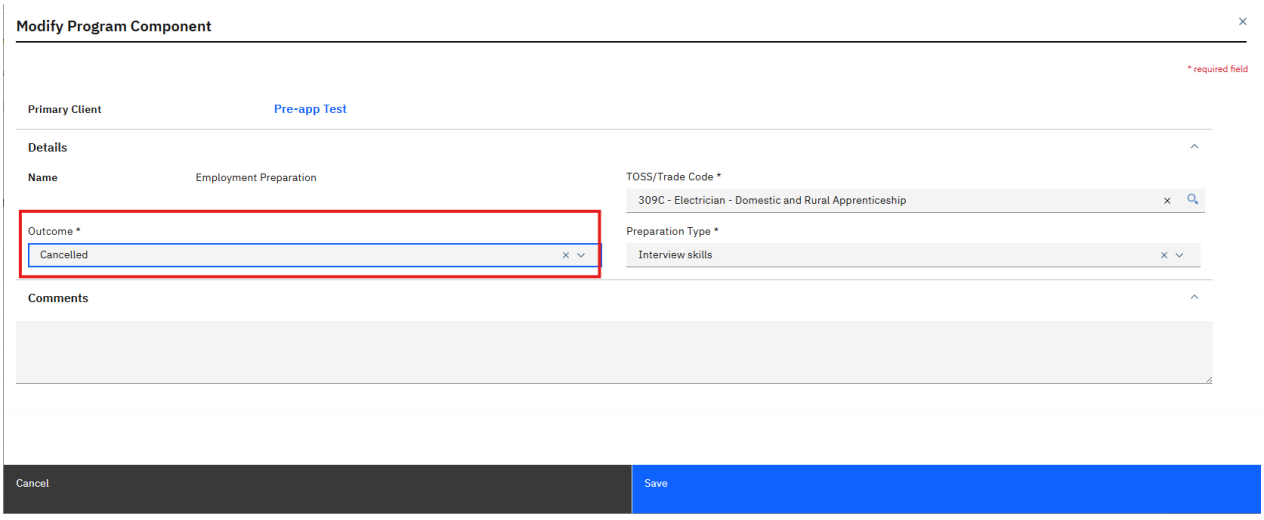
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If Additional Component has an Outcome of “Attained” or “Not attained”. It cannot be deleted.



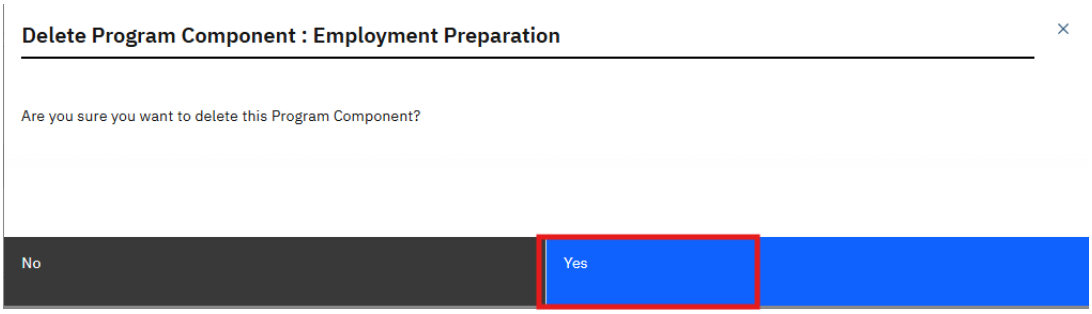
The Component will need first to be modified and change the Outcome to “Cancelled” or leave it blank. Please refer to Section “Modify or Complete Components”.



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Step 2: Delete Program Component Page

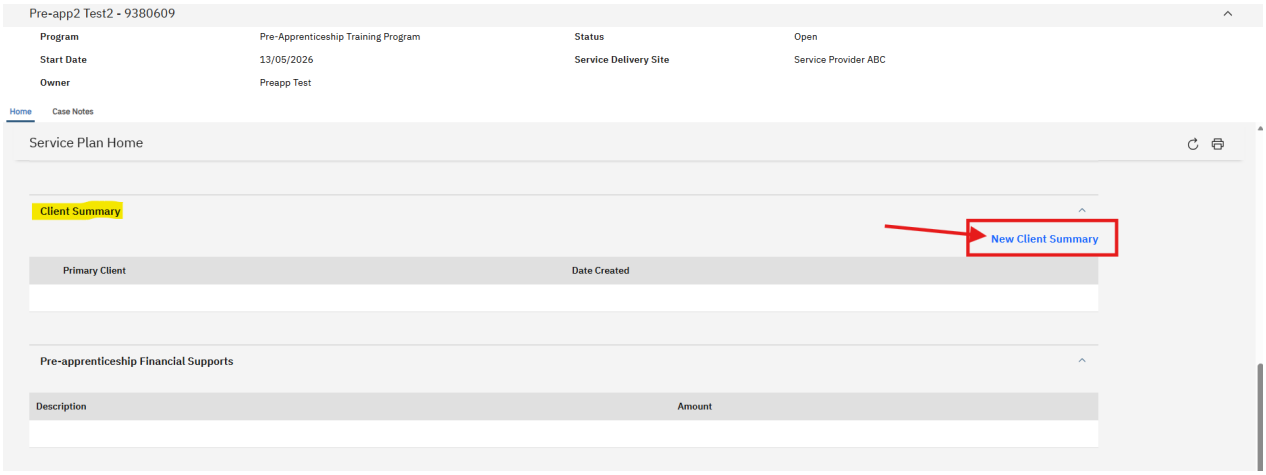
When asked to confirm the deleted, click YES.



Adding Client Summary (Activate the Pre-App Service Plan)

Step 1: Service Plan Home Page

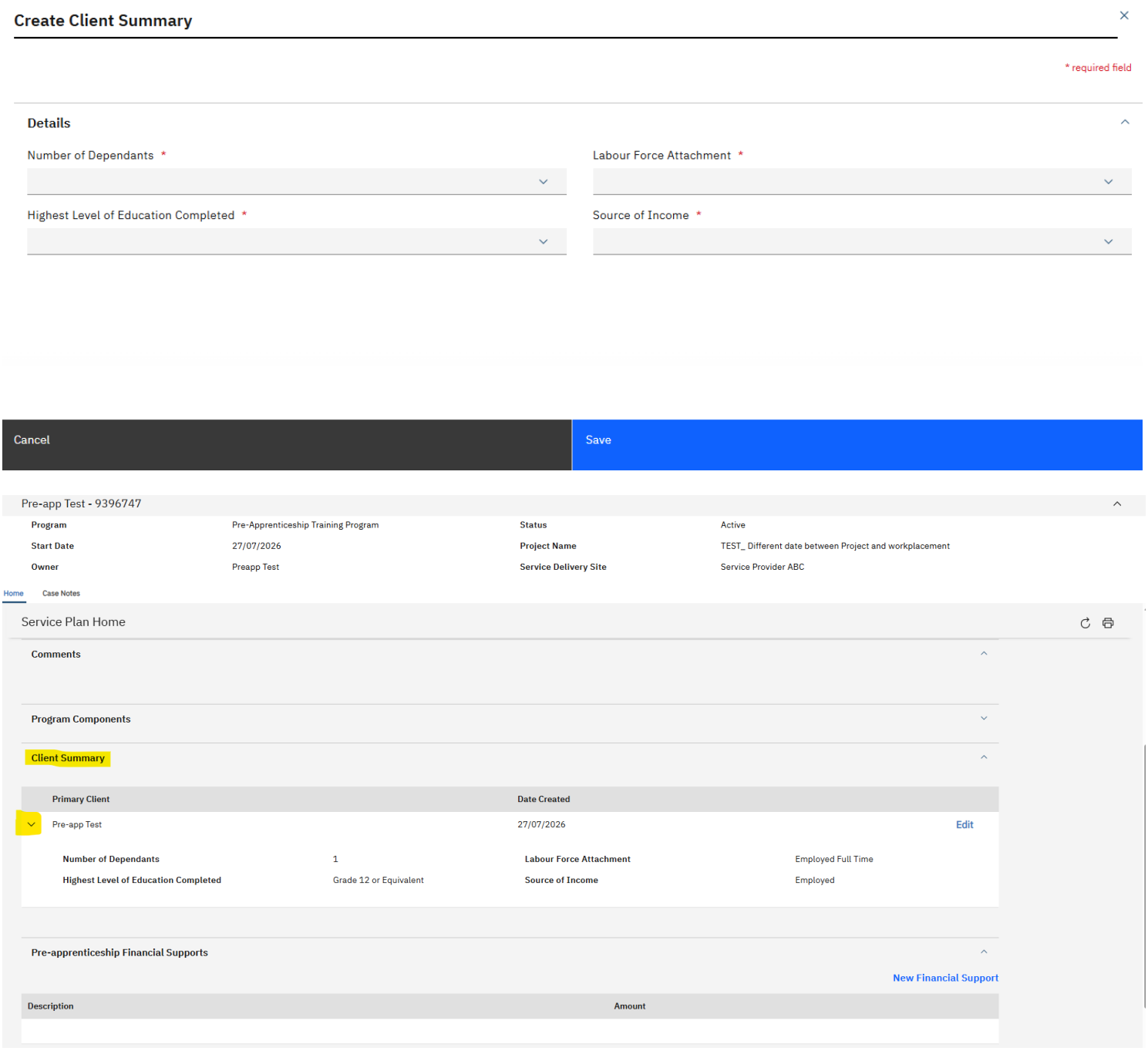
Click on NEW CLIENT SUMMARY



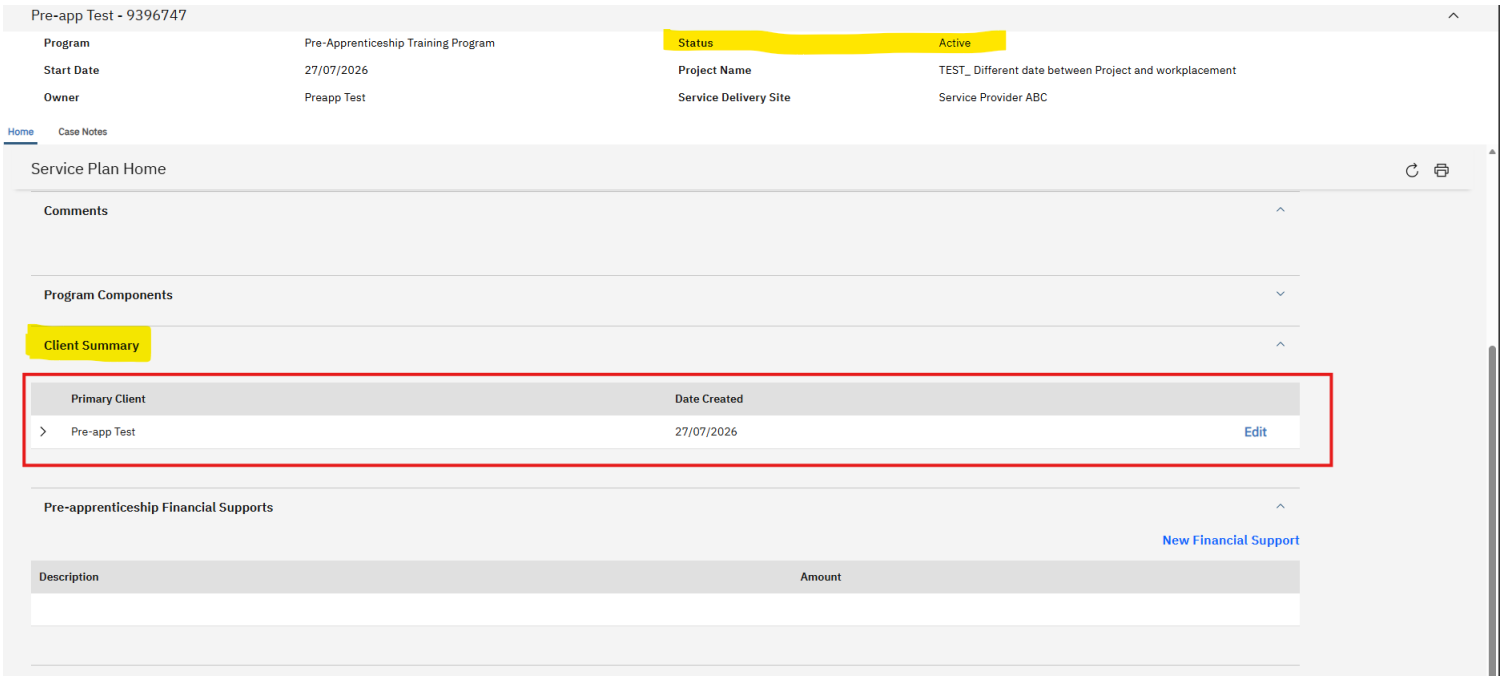
Step 2: Create Client Summary page.

On the Client Summary page, complete all mandatory fields under Details section. Details section can be modified later if the service plan status is "Open" or "Active".

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The case status will now change from “Open” to “Active”. The Service Plan home page will display the ‘New Financial Support’ button to allow authorized user to add financial support details.

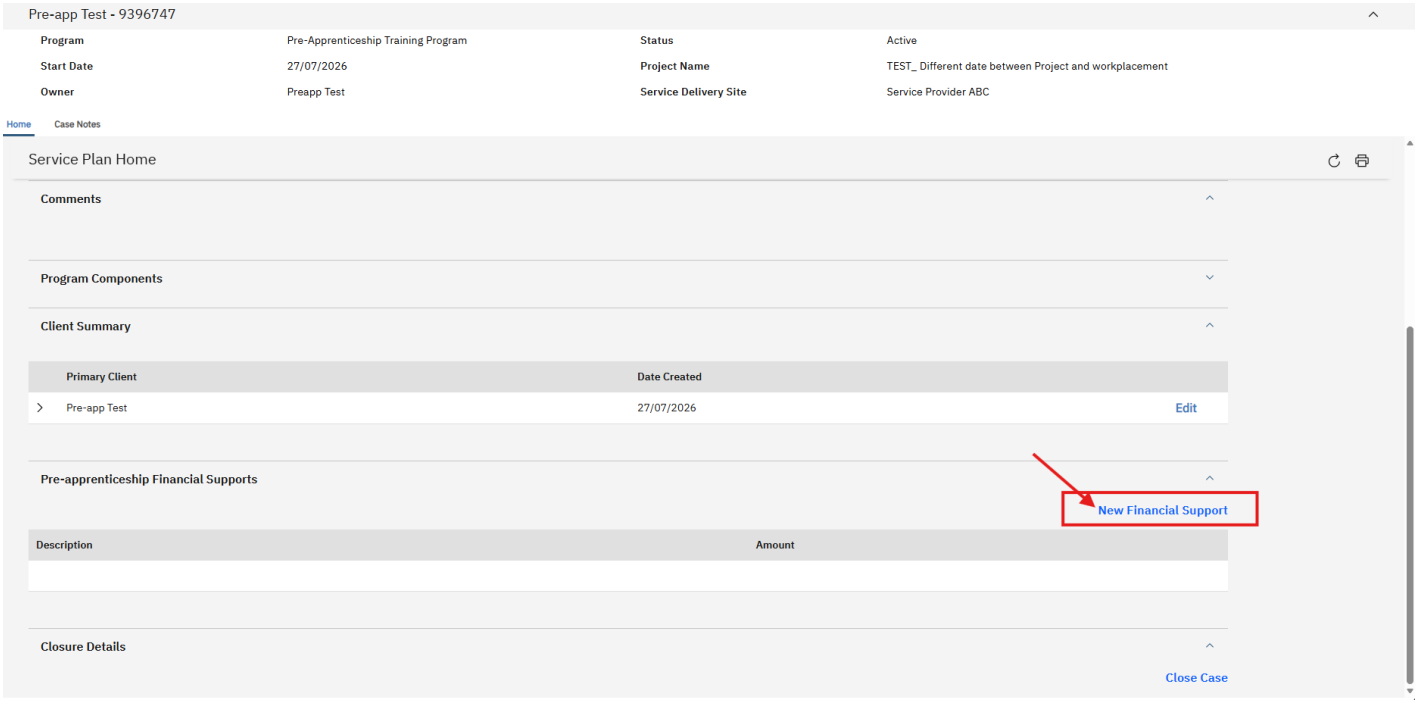
The Client Summary Details section will no longer be editable once the service plan is Closed. Therefore, it's crucial to ensure the accuracy of the information entered before Closing the service plan.

Adding Pre-Apprenticeship Financial Support

Step 1: Service Plan Home Page

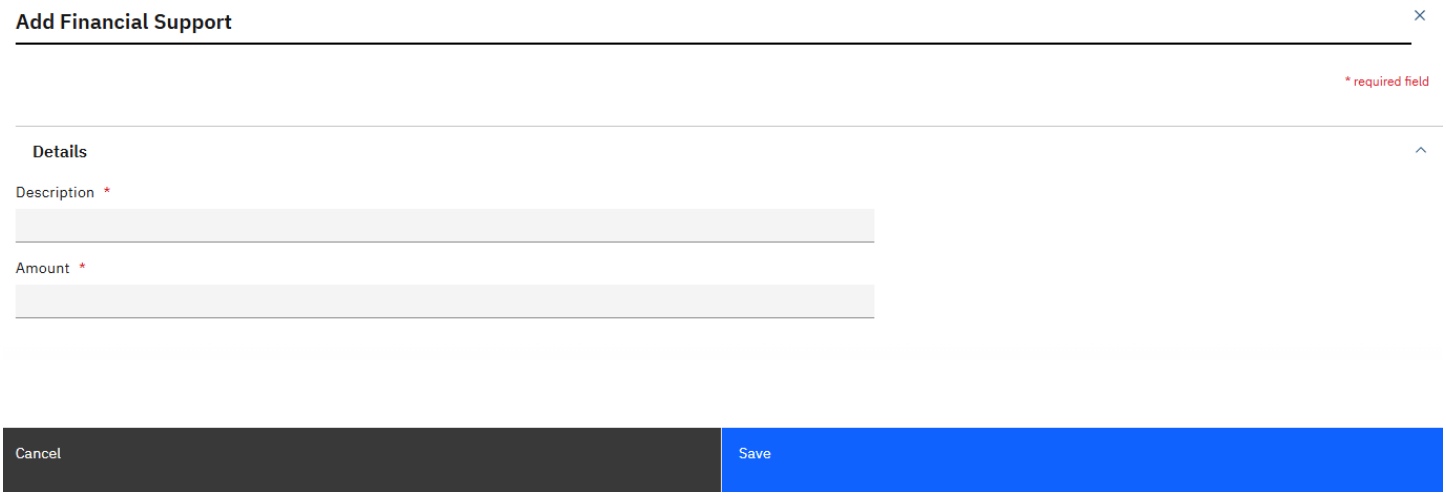
Click on NEW FINANCIAL SUPPORT

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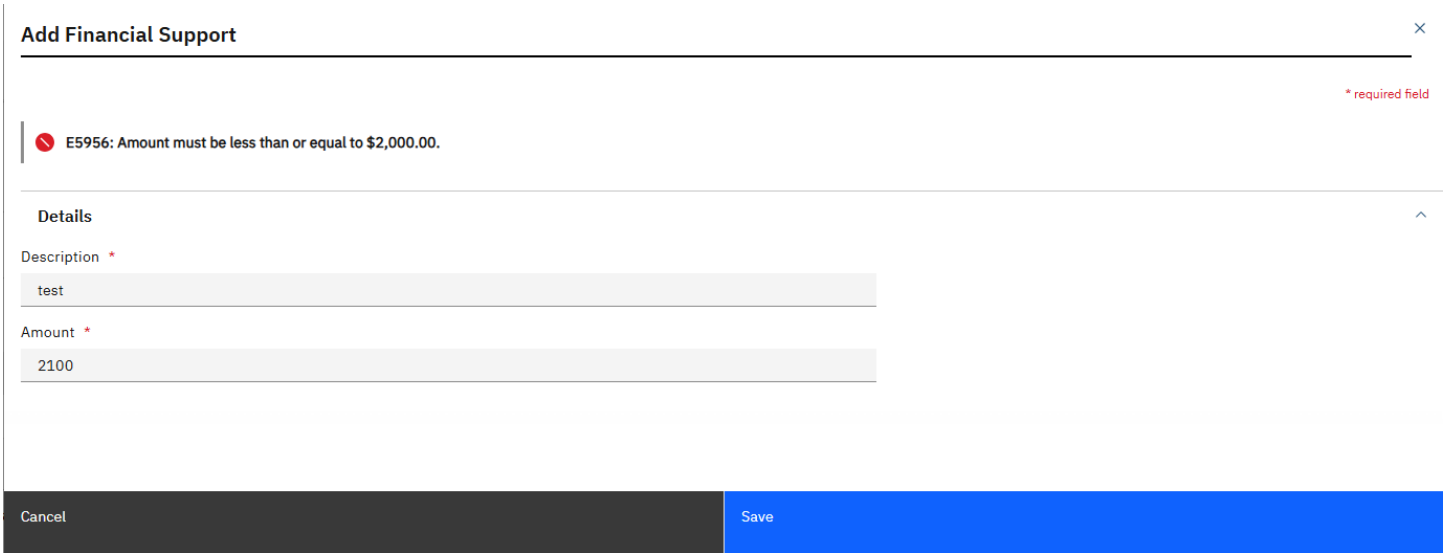


Step 2: Add Financial Support page.

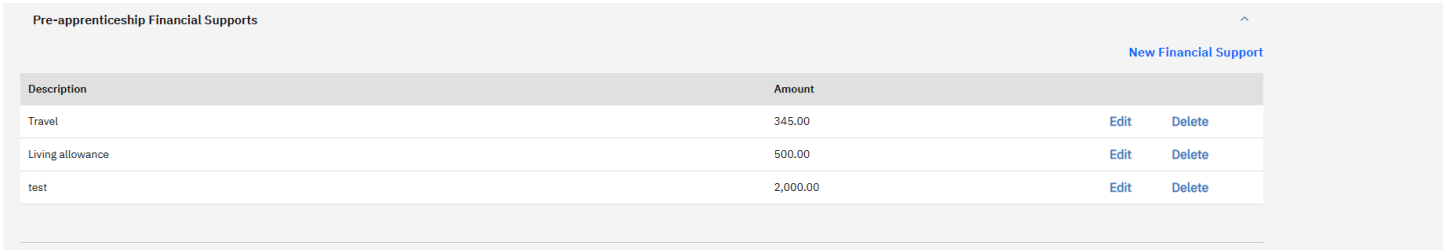
On the Financial Support page, complete all mandatory fields under Details section. Details section can be modified later if the service plan status is “Active”.



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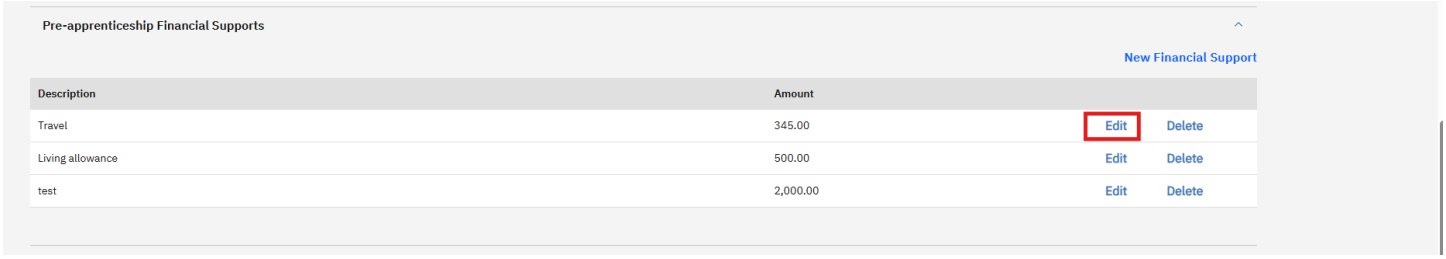
Amount must be less than or equal to $2,000.00.



Modify Financial Support

Step 1: Service Plan Main Page

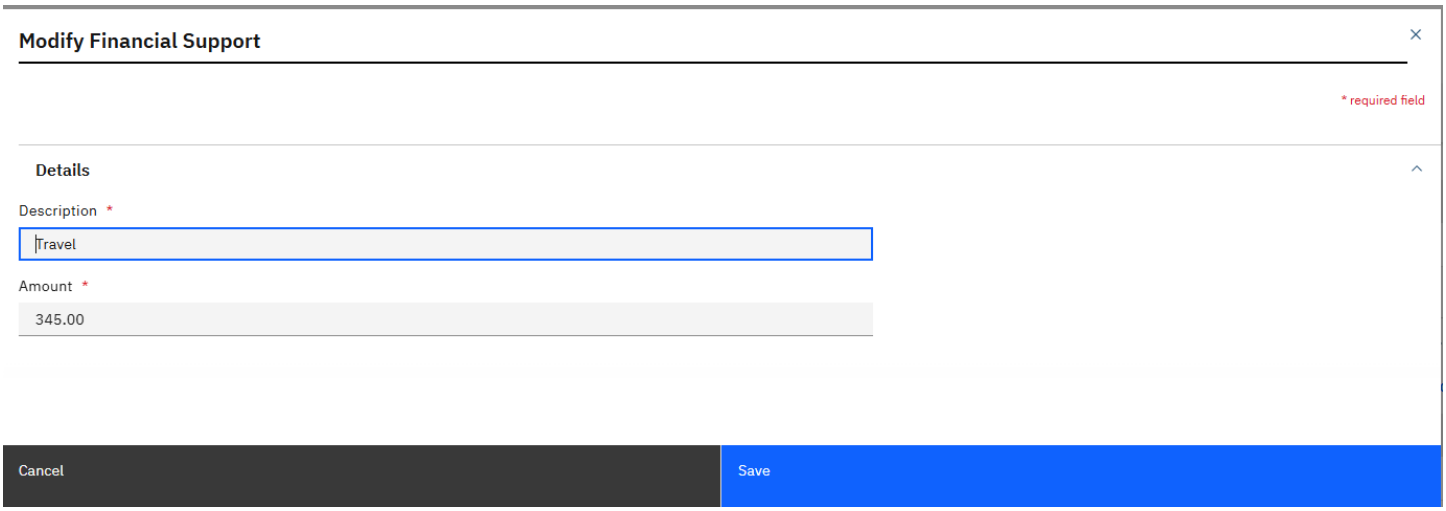
Under Pre-apprenticeship Financial Supports section, click EDIT next to the relevant Financial Support.



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Step 2: Modify Financial Support

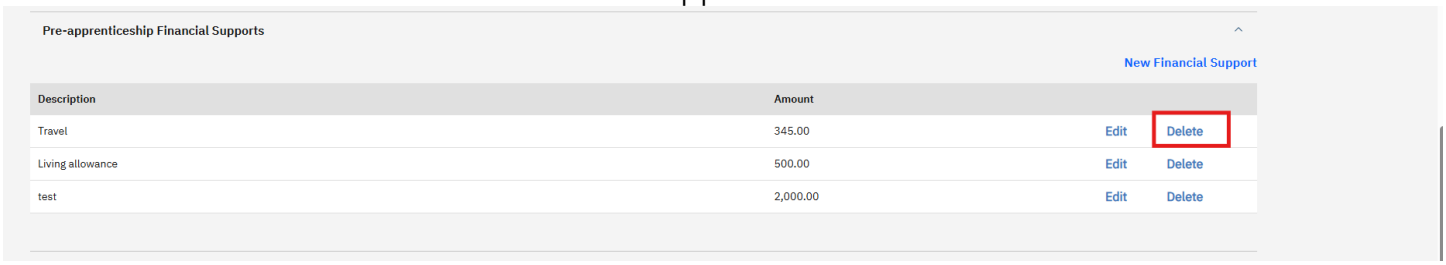
Modify Financial Support page will appear. Modify Financial Support details as needed.



Delete Financial Support

Step 1: Delete Financial Support

From the main page of a Pre-App Service Plan, Under Pre-apprenticeship Financial Supports, click DELETE next to the relevant Financial Support.



Step 2: Delete Financial Support Page

When asked to confirm the deleted, click YES.

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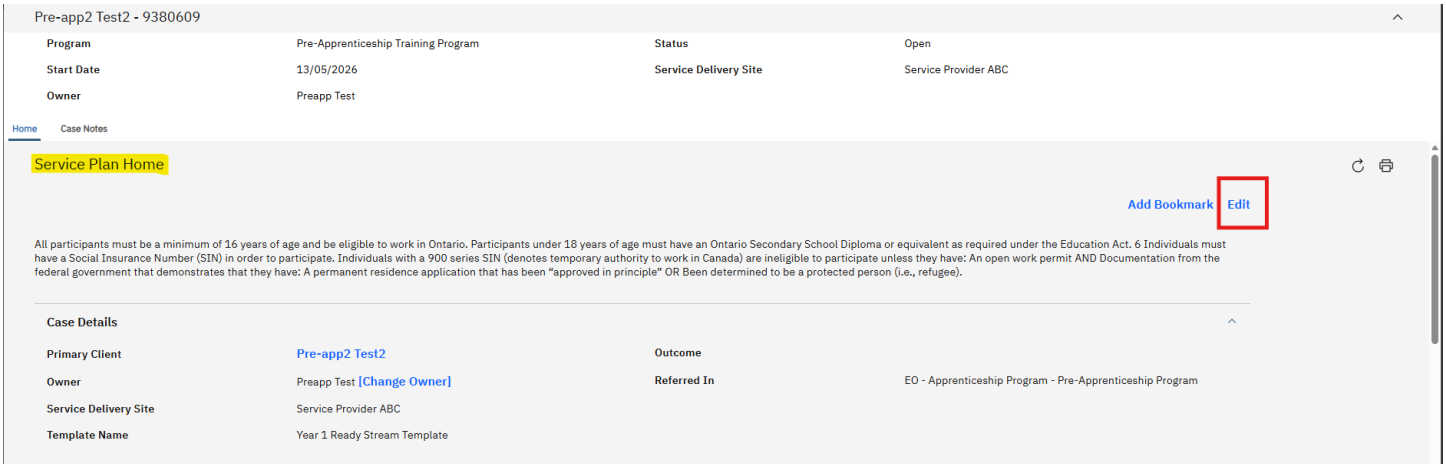


Modify Pre-App Service Plan

This section allows changes to the Referred In field. This field can be modified when a case status is “Open” or “Active”.

Step 1: Service Plan Home Page

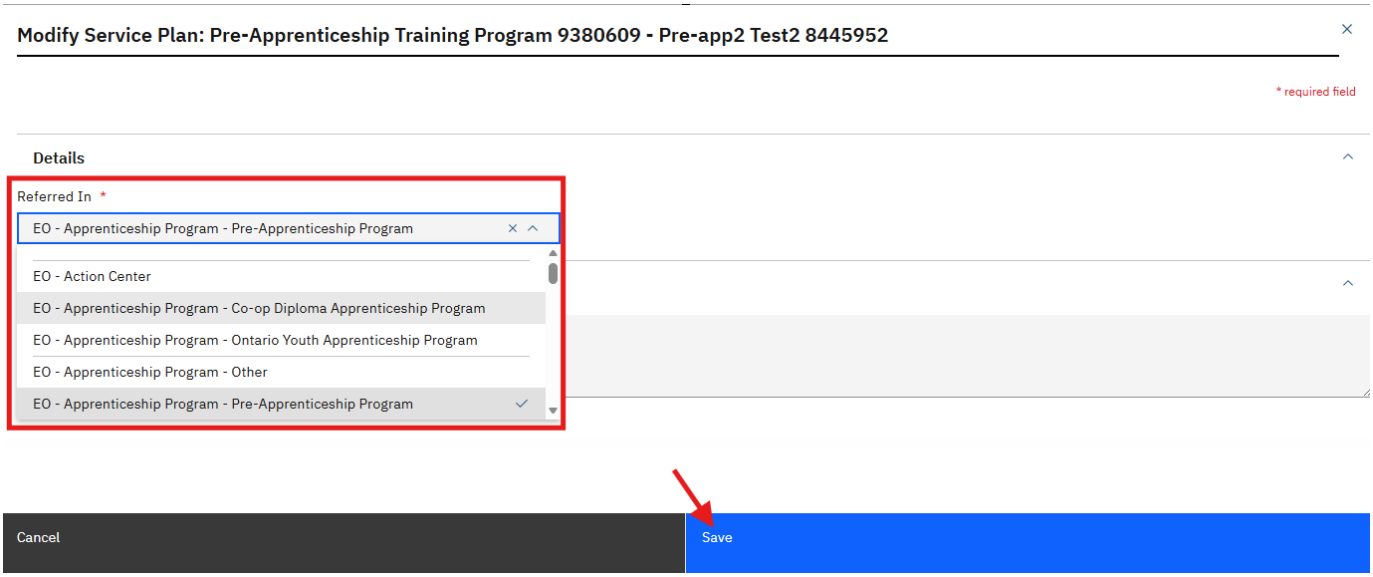
On the Pre-App Service Plan Home page, click on EDIT



Step 2: Modify Service Plan page.

Make the necessary change and click SAVE once completed.

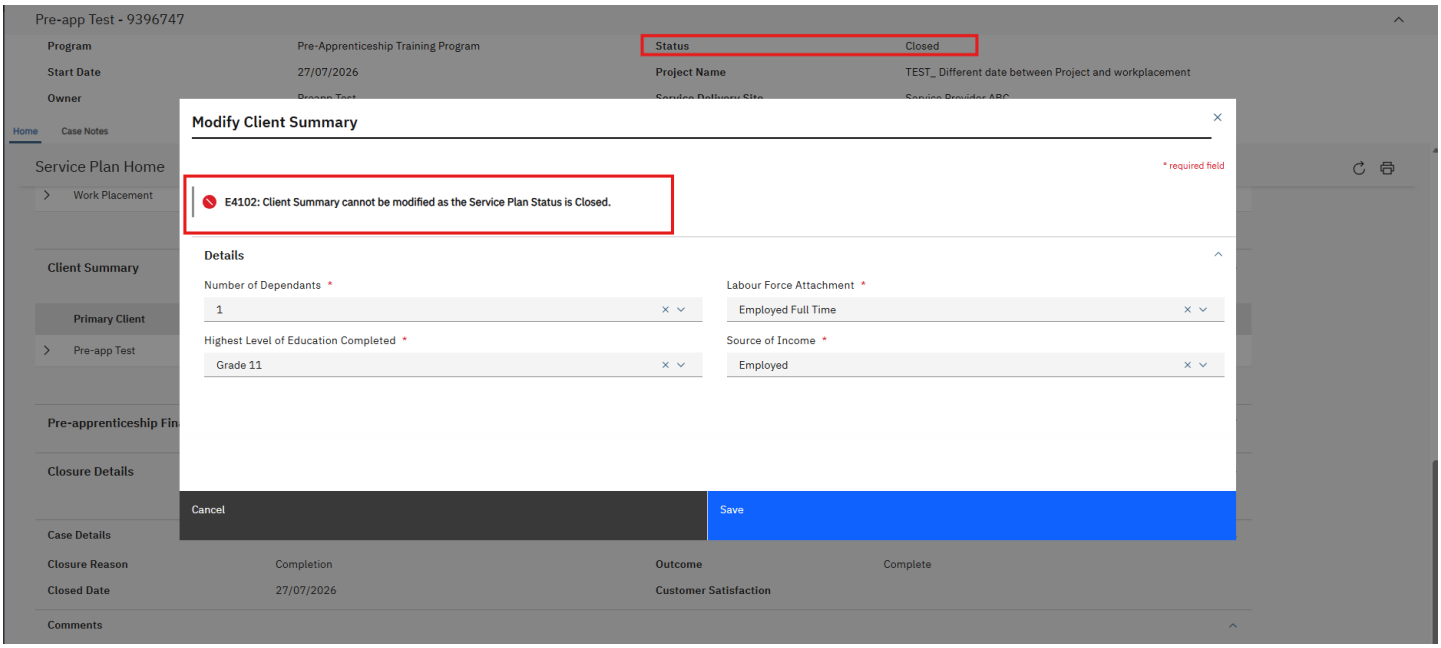
© King's Printer for Ontario, 2026.



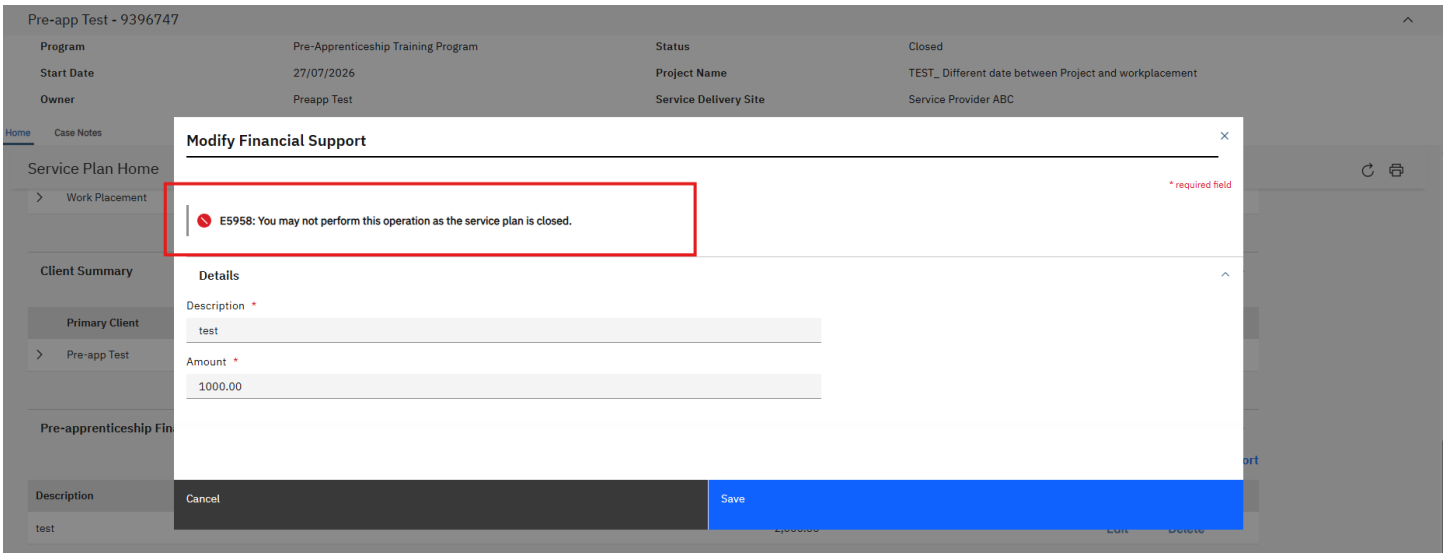
Close Pre-App Service Plan

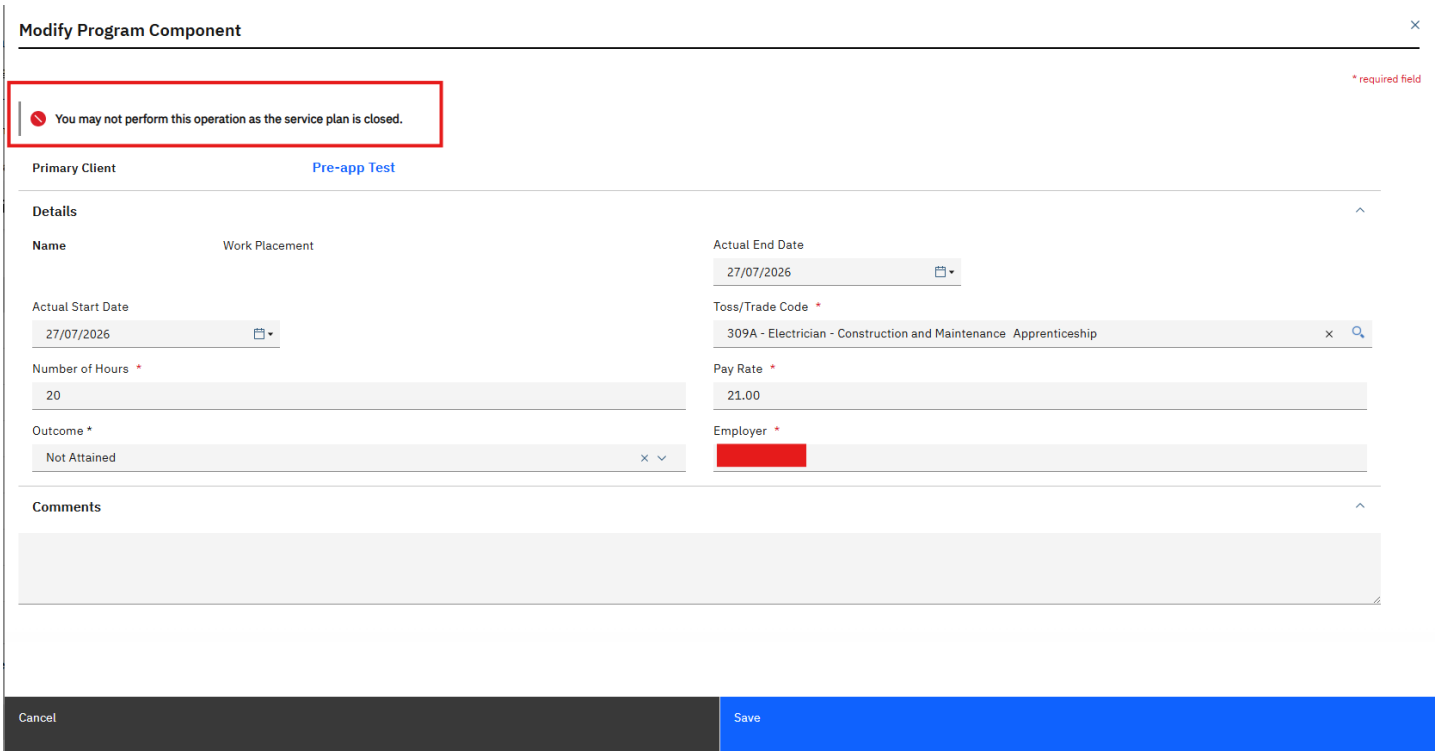
Before closing the service plan, ensure all information has been added to the case. Once the case is closed, an authorized user can no longer add or modify components, update the Client Summary, update financial support or edit the service plan.

A service plan cannot be reopened once it has been closed.



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Prerequisites:

- All associated Program Components must be completed with Outcome set before the case can be closed.
- The Client Summary must be completed.

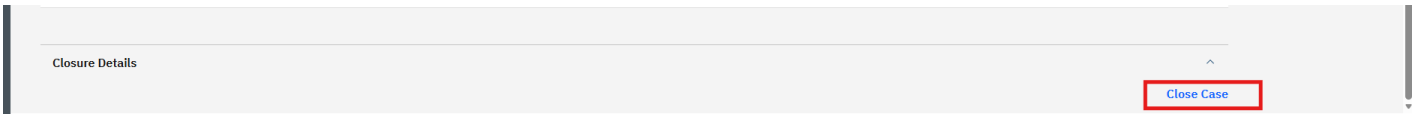
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- Financial supports need to be added before the Service plan is closed.
- If closure reason is Client Deceased, a Date of Death must be entered on the Person. homepage before the service plan can be closed. Refer to section “How to Modify Client Profile”.

System steps

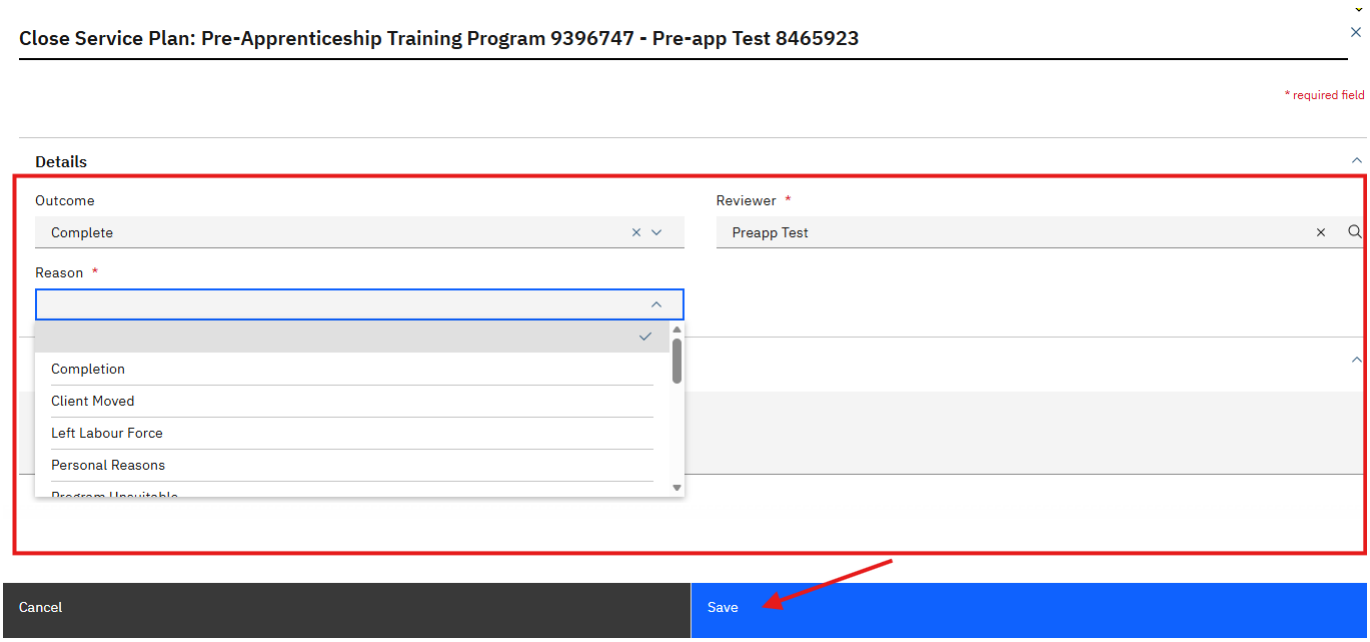
Step 1: Service Plan Home Page

On the Pre-App Service Plan Home page, click on CLOSE CASE.



Step 2: Close Service plan page

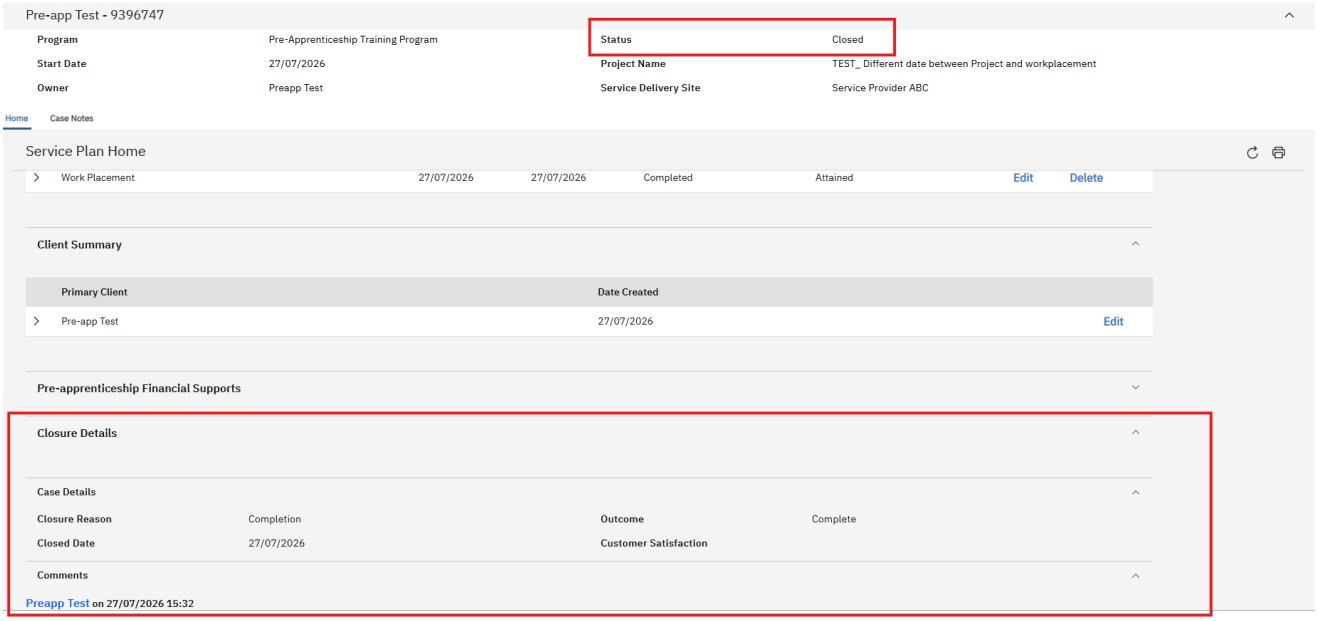
Complete all fields of the **Close Service Plan page.**



Once completed, click SAVE.

The case status will now change from “Active” to “Closed”.

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APPENDIX

Service Plan Status

There are three types of service plan statuses. The following is a description of each service plan status:

Open – the status is “open” when a service plan is created.

Active – the status is “active” when the client summary is added.

Closed – the status is “closed” when the service plan is manually closed by an authorized user.

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