

LBS service providers must ensure that **each learner file includes:**

- Rationale** for DECISIONS made by the LBS Service Provider;

SERVICE PLAN INFORMATION

Category of DECISION	Activity	BASIS FOR THE DECISION			DOCUMENTATION AND RECORDING DECISION				Revision	Notes
		Organizational Policy, Procedure, or Process (Documented where?)	Tools (paper?) Used (Samples where?)	Documentation Provided by Client	What is Documented of Decision in Local Systems	Copy of Organizational Tool Kept (/where)?	Copy of Client Provided Documentation Kept (/where)?	What is Documented of Decision in EOIS-CaMS		
Create a Service Plan	Referred In	"recognized referral Process"	based on Org. Process	Possible - based on Org. Process	Confirm Process Compliance: Referred From By: name On: date	based on Org. Process	based on Org. Process	Drop down list	1 2	<i>The individual has been formally referred, through a recognized referral process, not word of mouth, to the Literacy and Basic Skills provider from either another EO service provider or another community organization</i>
Create a Service Plan	Select Service Plan Template based on Goal Path	Is there a process for determining and documenting a goal path?		NA			NA	Drop down list	1 2	
Close Service Plan	Determine Closure Reason	(Recommended – who, what, where, when)						Drop down list		
Close Service Plan	Outcome	(Recommended – who, what, where, when)						Drop down list		
Close Service Plan	MTCU Exit Form Including Customer Satisfaction	(Recommended – who, what, where, when)		NA		Optional - based on Org. policy	NA	Drop down list 1 2 3 4 5 No Response		Exit related No Learner or Reviewer signature on Exit and Follow-up form 1788E (2016/11)

Category of DECISION	Activity	BASIS FOR THE DECISION			DOCUMENTATION AND RECORDING DECISION				Revision	Notes
		Organizational Policy, Procedure, or Process (Documented where?)	Tools (paper?) Used (Samples where?)	Documentation Provided by Client	What is Documented of Decision in Local Systems	Copy of Organizational Tool Kept (/where)?	Copy of Client Provided Documentation Kept (/where)?	What is Documented of Decision in EOIS-CaMS		
Close Service Plan	Exit Learner Gains Score									??
Close Service Plan	Has the goal path specific Culminating Task been successfully completed?									
Close Service Plan	Has the learner completed all goal path required learning activities?									
Assessment	Learning Style							Not in Data Dictionary		Administer assessment to develop a learner plan, including assessment of learners': o Learning style
Client is ready to exit or transition out of program?										
Referral - Exit Transition										
Referral – Training in Progress										

2. Participant Registration **Form** (Includes "Client Summary" Section);

Category of INFORMATION	Confirmation Activity	BASIS FOR THE CONFIRMATION			DOCUMENTATION AND RECORDING				Revision	Notes ¹ EOIS-CaMS Required Field
		Organizational Policy, Procedure, or Process (Documented where?)	In-House Tools (paper?) Used (Samples where?)	Documentation Provided by Client	What is Documented in Local Systems	Copy of In-House Tool Kept (/where)?	Copy of Client Provided Documentation Kept (/where)?	What is Documented in EOIS-CaMS		
Status in Canada	(Soliciting or gathering, not confirmation)				(Confirm, if not proof of Ontario Residency – Optional)	NA	Copied and/or retained based on Org. Policy	<ul style="list-style-type: none"> • Canadian Citizen • Permanent Resident • Other (specify) 		Is proof validated or confirmed by the LBS program? "Canadian Citizen" is someone who can legally vote in Canada. "Permanent Resident" is someone who is entitled to most of the health and social services as a "Canadian Citizen," but cannot vote. It includes Landed Immigrants. "Other" is someone who is not a Canadian Citizen nor a Permanent Resident (e.g. someone working temporarily in Canada, a foreign student, or a refugee).
Date of Birth	Confirm and validate client's age	(Recommended – who, what, where, when)	NA	A range of documents	Confirm Policy Compliance: Date of Birth By: name On: date	NA	Copied and/or retained based on Org. Policy	Date of Birth		Supports LBS Guidelines Eligibility Decision >19 Supports LBS Guidelines Suitability Decision <i>Over 45 and under 64</i> <i>Age is derived from the following: Date of Birth minus the start date of the service plan (the "Date Created" field).</i>
Marital Status		NA	NA	NA	Optional	NA	NA	<ul style="list-style-type: none"> • Single • Married.. • Undisclosed 		
Client Self-Identification	(Soliciting or gathering not confirmation)	(Recommended – who, what, where, when)	Optional – though often used	NA	Confirm Policy Compliance: 1-7 below By: name On: date	Optional	Copied and/or retained based on Org. Policy	1-7 below		Supports LBS Guidelines Suitability Decision (partial) Client affirms information by signing EO Participation Form
1. Newcomer				NA				Yes/No		
2. Francophone				NA				Yes/No		
3. Deaf				NA				Yes/No		

Category of INFORMATION	Confirmation Activity	BASIS FOR THE CONFIRMATION			DOCUMENTATION AND RECORDING				Revision	Notes ¹ EOIS-CaMS Required Field
		Organizational Policy, Procedure, or Process (Documented where?)	In-House Tools (paper?) Used (Samples where?)	Documentation Provided by Client	What is Documented in Local Systems	Copy of In-House Tool Kept (/where)?	Copy of Client Provided Documentation Kept (/where)?	What is Documented in EOIS-CaMS		
4. First Nations				NA				<ul style="list-style-type: none"> • First Nations • Inuit • Métis • Person of Aboriginal Ancestry 		
5. Racialized Person				NA				Yes/No		Visible minorities are defined based on the Employment Equity Act definition as persons, other than Aboriginal peoples, who are non-Caucasian in race or non-white in colour and include Chinese, South Asian, Black, Filipino, Latin American, Southeast Asian, Arab, West Asian, Japanese, Korean, other visible minorities and multiple visible minorities.
6. Person with Disability				NA				Yes/No		<p>Suitability / Learner Profile Indicator (Phase II)</p> <p>The client has self-identified as disabled as defined by the Ontario Disability Support Program (substantial physical or mental impairment that is continuous or recurrent). The Accessibility for Ontarians with Disabilities Act 2005(AODA), and Ontario Human Rights Code definition includes persons who have:</p> <ul style="list-style-type: none"> • any degree of physical disability, infirmity, malformation or disfigurement that is caused by bodily injury, birth defect or illness and, without limiting the generality of the foregoing, includes diabetes mellitus, epilepsy, brain injury, any degree of paralysis, amputation, lack of physical coordination, blindness or visual impediment, deafness or hearing impediment, muteness or speech impediment, or physical reliance on a guide dog or other animal or on a wheelchair or other remedial appliance or device; • a condition of mental impairment or develop mental disability; • a learning disability or a dysfunction in one or more of the processes involved in understanding or using symbols or spoken language; • a mental disorder; or • an injury or disability for which benefits were claimed or received under the insurance plan established under the Workplace Safety and Insurance Act, 1997 ("handicap").

Category of INFORMATION	Confirmation Activity	BASIS FOR THE CONFIRMATION			DOCUMENTATION AND RECORDING				Revision	Notes ¹ EOIS-CaMS Required Field
		Organizational Policy, Procedure, or Process (Documented where?)	In-House Tools (paper?) Used (Samples where?)	Documentation Provided by Client	What is Documented in Local Systems	Copy of In-House Tool Kept (/where)?	Copy of Client Provided Documentation Kept (/where)?	What is Documented in EOIS-CaMS		
7. Deafblind				NA				Yes/No		
8. Inuit										
9. Métis										
Primary Mailing Address	Confirm and validate Ontario residency.	(Recommended – who, what, where, when)	Optional	Proof	Confirm Policy Compliance: Address Below By: name On: date	Optional	Copied and/or retained based on Org. Policy	Address Below		Supports LBS Guidelines Eligibility Decision <i>Ontario Resident</i>
• Street					Street			Street		
• City					City			City		
• Postal Code					Postal Code			Postal Code		
EDUCATION	Soliciting or gathering (not confirmation) for purposes of Suitability	(Recommended – who, what, where, when)	Optional	Transcript? Certificates?	Confirm Policy Compliance: Education By: name On: date	Optional	Copied and/or retained based on Org. Policy	Education history below		Supports LBS Guidelines Suitability Decision (partial)
• Institution (od Highest Level of Education)								Institution		

Commented [AC1]: OHIP
Valid Ontario Driver's Licence • Temporary Driver's Licence (only if accompanied by photo licence card with the same address) • Valid Ontario Photo Card • Utility bill received by mail (e.g. cable TV, hydro, gas, water) • Monthly mailed bank account statements for savings or chequing accounts (does not include receipts, bank books, letters or automated teller receipts) • Employer record (pay stub or letter from employer on company letterhead) • School, college or university report card or transcript • Child Tax Benefit Statement • Income tax assessment (most recent) • Insurance policy (home, tenant, auto or life) • Mortgage, rental or lease agreement • Ontario Motor Vehicle Permit (plate or vehicle portions) • Property tax bill • Statement of Direct Deposit for Ontario Works or for Ontario Disability Support Program • Statement of Employment Insurance Benefits Paid T4E • Statement of Old Age Security T4A (OAS) or Statement of Canada Pension Plan Benefits T4A (P) • Statement of Registered Retirement Savings Plan (RRSP), Registered Retirement Income Fund (RRIF) or Registered Home Ownership Savings Plan (RHOSP) from a financial institution (bank, trust company, credit union) • Workplace Safety and Insurance Board Statement of Benefits T5007 • Canada Pension Plan Statement of Contributions

Commented [AC2]: Is the education history confirmed?

Category of INFORMATION	Confirmation Activity	BASIS FOR THE CONFIRMATION			DOCUMENTATION AND RECORDING				Revision	Notes ¹ EOIS-CaMS Required Field
		Organizational Policy, Procedure, or Process (Documented where?)	In-House Tools (paper?) Used (Samples where?)	Documentation Provided by Client	What is Documented in Local Systems	Copy of In-House Tool Kept (/where)?	Copy of Client Provided Documentation Kept (/where)?	What is Documented in EOIS-CaMS		
<ul style="list-style-type: none"> Qualification 								Grade 0-8 Grade 9 Grade 10 Grade 11 Grade 12 or equivalent OAC Some Apprenticeship Some College Some University Certificate of Apprenticeship Journeyman Certificate/Diploma Applied Degree Bachelor's Degree Post Graduate		The level of education (or training) successfully completed, or in the process of being completed.
<ul style="list-style-type: none"> Start Date 								Start Date		
<ul style="list-style-type: none"> Type 								Type		
<ul style="list-style-type: none"> Country 								Country		
EMPLOYMENT	Soliciting or gathering (not confirmation) for purposes of Suitability	(Recommended – who, what, where, when)	Optional		Confirm Policy Compliance: Employment By: name On: date		Optional			

Commented [AC3]: Is employment and employment history confirmed?

Category of INFORMATION	Confirmation Activity	BASIS FOR THE CONFIRMATION			DOCUMENTATION AND RECORDING				Revision	Notes ¹ EOIS-CaMS Required Field
		Organizational Policy, Procedure, or Process (Documented where?)	In-House Tools (paper?) Used (Samples where?)	Documentation Provided by Client	What is Documented in Local Systems	Copy of In-House Tool Kept (/where)?	Copy of Client Provided Documentation Kept (/where)?	What is Documented in EOIS-CaMS		
• Employment Type								<ul style="list-style-type: none"> • ES Placement with Incentive • ES Placement without Incentive • JCP Placement Paid Placement Hire • SJS Placement • Self-Employment • Unpaid • Volunteer 		
• Country of Employment				Pay Stub			Copied and/or retained based on Org. Policy	Country of Employment		
• Employer				Pay Stub			Copied and/or retained based on Org. Policy	The name of the client's Employer		
• From Date								The start date of the client's employment.		
• Job Title								Job Title		
• Employment Hours per Week				Pay Stub				Employment Hours per Week		
• Employment NOC	Research (not confirmation)		No	No	(Optional - Employment NOC)	No	No	Employment NOC		
• NAICS Code	Research (not confirmation)		No	No	(Optional - NAICS Code)	No	No	NAICS Code		
Client self-assessment										

Category of INFORMATION	Confirmation Activity	BASIS FOR THE CONFIRMATION			DOCUMENTATION AND RECORDING				Revision	Notes ¹ EOIS-CaMS Required Field
		Organizational Policy, Procedure, or Process (Documented where?)	In-House Tools (paper?) Used (Samples where?)	Documentation Provided by Client	What is Documented in Local Systems	Copy of In-House Tool Kept (/where)?	Copy of Client Provided Documentation Kept (/where)?	What is Documented in EOIS-CaMS		
How long do you think you will spend in the program? (weeks)										
On average, how many hours a week can you devote to your learning? (hrs(s) per week) In class or On your own										
Participant's Signatures										

Category of INFORMATION	Confirmation Activity	BASIS FOR THE CONFIRMATION			DOCUMENTATION AND RECORDING				Revision	Notes ¹ EOIS-CaMS Required Field
		Organizational Policy, Procedure, or Process (Documented where?)	In-House Tools (paper?) Used (Samples where?)	Documentation Provided by Client	What is Documented in Local Systems	Copy of In-House Tool Kept (/where)?	Copy of Client Provided Documentation Kept (/where)?	What is Documented in EOIS-CaMS		
CLIENT SUMMARY										
Referred In										Duplicate of Client Service Plan Information
Template (Service Plan)										Duplicate of Client Service Plan Information
Language Spoke at Home									1	
Language Spoke at Last Workplace									1	

Category of INFORMATION	Confirmation Activity	BASIS FOR THE CONFIRMATION			DOCUMENTATION AND RECORDING				Revision	Notes ¹ EOIS-CaMS Required Field
		Organizational Policy, Procedure, or Process (Documented where?)	In-House Tools (paper?) Used (Samples where?)	Documentation Provided by Client	What is Documented in Local Systems	Copy of In-House Tool Kept (/where)?	Copy of Client Provided Documentation Kept (/where)?	What is Documented in EOIS-CaMS		
Service Provision Language									1	
Source of Income	Confirm Income source	(Recommended – who, what, where, when)			Confirm Policy Compliance: Source of Income By: name On: date		Copied and/or retained based on Org. Policy	Employed Ontario Works (OW) Crown Ward Dependent of OWIODSP Recipient Self-employed Ontario Disability Support Program (ODSP) Employment Insurance (EI) No Income Other, specify		Supports LBS Guidelines Suitability Decision <i>OW/ODSP/No source of income/crown ward</i>
Education										

Category of INFORMATION	Confirmation Activity	BASIS FOR THE CONFIRMATION			DOCUMENTATION AND RECORDING				Revision	Notes ¹ EOIS-CaMS Required Field
		Organizational Policy, Procedure, or Process (Documented where?)	In-House Tools (paper?) Used (Samples where?)	Documentation Provided by Client	What is Documented in Local Systems	Copy of In-House Tool Kept (/where)?	Copy of Client Provided Documentation Kept (/where)?	What is Documented in EOIS-CaMS		
Highest Level of Education Completed	Confirm less than grade 12	(Recommended – who, what, where, when)		Transcript?	Confirm Policy Compliance: Education By: name On: date		Copied and/or retained based on Org. Policy	Grade 0 - 8 Grade 9 Grade 10 Grade 11 Grade 12 (or equivalent) OAC Journey person Applied Degree Some College Associate Degree Some Apprenticeship Certificate/Diploma Bachelor's Degree Certificate of Apprenticeship Some University Post Graduate		Supports LBS Guidelines Suitability Decision <i>less than grade 12</i>
Time Out of Formal Education	Confirm out of education six years or more			Transcript?			Copied and/or retained based on Org. Policy	Less than 3 months 3 to 6 months 6 months to 1 year 1 year to 6 years More than 6 years NA		Supports LBS Guidelines Suitability Decision <i>out of education six years or more</i>
Country Highest Level of Education Completed								In Canada Outside Canada		

Category of INFORMATION	Confirmation Activity	BASIS FOR THE CONFIRMATION			DOCUMENTATION AND RECORDING				Revision	Notes ¹ EOIS-CaMS Required Field
		Organizational Policy, Procedure, or Process (Documented where?)	In-House Tools (paper?) Used (Samples where?)	Documentation Provided by Client	What is Documented in Local Systems	Copy of In-House Tool Kept (/where)?	Copy of Client Provided Documentation Kept (/where)?	What is Documented in EOIS-CaMS		
Time Out of Training	Confirm out of training for six years or more	(Recommended – who, what, where, when)		???			Copied and/or retained based on Org. Policy	Less than 3 months 3 to 6 months 6 months to 1 year 1 year to 6 years More than 6 years NA		Supports LBS Guidelines Suitability Decision (partial)
History of Interrupted Education	Confirm history of interrupted education	(Recommended – who, what, where, when)		Transcript?			Copied and/or retained based on Org. Policy			Supports LBS Guidelines Suitability Decision <i>history of interrupted education</i>
Employment										Supports LBS Guidelines Suitability Decision (partial)
Labour Force Attachment								Employed Full-Time Employed Part-Time Unemployed Under-employed Self-employed Full-time Student Part-time Student		The current employment status of the individual at the time the service plan was developed.
Employment Experience								No work experience worked in Canada Worked, but not in Canada		
Registered Apprentice								Yes/No		

Commented [AC4]: Confirm

Category of INFORMATION	Confirmation Activity	BASIS FOR THE CONFIRMATION			DOCUMENTATION AND RECORDING				Revision	Notes ¹ EOIS-CaMS Required Field
		Organizational Policy, Procedure, or Process (Documented where?)	In-House Tools (paper?) Used (Samples where?)	Documentation Provided by Client	What is Documented in Local Systems	Copy of In-House Tool Kept (/where)?	Copy of Client Provided Documentation Kept (/where)?	What is Documented in EOIS-CaMS		
Time Out of Work								Less than 3 months 3 to 6 months 6 months to 1 year 1 year to 6 years More than 6 years NA		
Assessment										
Entry Assessment Tool	Identify Tool Used	(Policy approving tools to establish "levels" or proxy).						CABS Camera DEARAT DESEE DESOT PDQ Towes Other (specify)		
Entry Assessment Results		(Recommended – who, what, where, when)								Supports LBS Guidelines Eligibility Decision <i>An adult whose literacy and basic skills are assessed at intake as being less than the end of Level 3 of the International Adult Literacy and Skills Survey (IALSS) or the OALCF.</i>
Date of Assessment										
Canadian Language Benchmarks Assessment ● Speaking ● Listening ● Reading ● Writing		(Policy approving tools to establish "levels" or proxy).		??	Confirm Policy Compliance: CLB By: name On: date			(1-12 or NA for each) Speaking Listening Reading Writing		Supports LBS Guidelines Eligibility Decision <i>Sufficiently proficient in speaking and listening to benefit fully from the language of LBS instruction (English or French). Canadian Language Benchmark (CLB) level 6 for speaking and listening to benefit fully from the language of LBS instruction (English or French). Canadian</i> A Canadian Language Benchmark Assessment score is to be issued by a CLB Centre.

Category of INFORMATION	Confirmation Activity	BASIS FOR THE CONFIRMATION			DOCUMENTATION AND RECORDING				Revision	Notes ¹ EOIS-CaMS Required Field
		Organizational Policy, Procedure, or Process (Documented where?)	In-House Tools (paper?) Used (Samples where?)	Documentation Provided by Client	What is Documented in Local Systems	Copy of In-House Tool Kept (/where)?	Copy of Client Provided Documentation Kept (/where)?	What is Documented in EOIS-CaMS		
Estimated Learner Weekly Time Commitment										
Add Sub-Goal Plan Item										
Sub-Goal										
Plan Item										
Expected Start Date										
Expected End Date										
Expected Outcome										
Estimated Cost										
Milestone										
Delivery Method										

3. **Learner Plan** (see Section 3.1 Roles and Responsibilities);

Commented [AC5]: LBS service providers must:

- Work with learners to develop a learner plan that reflects what the learner needs for the goal path.
- Ensure that the learner plan:
 - Includes the background information gathered in the learner profile.
 - Identifies necessary referrals throughout the process.
 - Identifies the learner's goal path.
 - Details the learning activities to prepare learners for their goal path.
 - Identifies milestone tasks that the learner needs to successfully demonstrate.
 - Identifies the culminating task.
 - Considers whether e-Channel delivery is appropriate for the learner.
 - Indicates dates and establishes time lines (date the learner plan was developed, start date and projected end date for learner's program, estimated time per week learner commits to their LBS training which includes both supervised and independent study and, dates for the learner and LBS Service Provider staff to review progress).
 - Includes any other non-LBS requirements (certificates, courses, abilities) of the learner's goal path.
- Establish a process for regular and timely review of learner achievements, including successfully demonstrated milestone and culminating tasks, and other assessment results which indicate progress towards completion of goal path. If the learner is not on track or if the learner's goal has changed, the learner plan is revised to reflect changes in learning activities and expected outcomes.
- Provide the learner with a copy of the learner plan and keep a copy on file. Learner files must be made available for review by Ministry staff.

Category of INFORMATION	Confirmation Activity	BASIS FOR THE CONFIRMATION			DOCUMENTATION AND RECORDING				Revision	Notes
		Organizational Policy, Procedure, or Process (Documented where?)	In-House Tools (paper?) Used (Samples where?)	Documentation Provided by Client	What is Documented in Local Systems	Copy of In-House Tool Kept (/where)?	Copy of Client Provided Documentation Kept (/where)?	What is Documented in EOIS-CaMS		
	MTCU Learner Plan (In EOIS-CaMS)									Once downloaded in a PDF format you can print the LP to have the learner sign the copy. Keep a signed LP on file for your Ministry site visit.
	Classroom Training Plan									
	Template									
	MTCU Enhanced Learner Plan Template (PDF) In-house Learner Plan									
	Select Learner Plan Activities									"The learning activities detailed in a learner plan include the competencies, skills and content a learner must develop to meet the requirements of the goal. Fourteen learning activity categories have been created in the Employment Ontario Information System- Case Management System (EOIS-CaMS) to help service providers select and add to the learner's learner plan.
	Track Learner Plan Activities									
	Learner Plan Summary									

a learner's plan needs adjusting

When you have agreed on a new plan, make notes in the learner file that explain the changes and the rationale

Update EOIS-CaMS

Download a new Enhanced Learner Plan from EOIS-CaMS

Print the new Enhanced Learner Plan (or the pieces of the plan that have changed)

Have the learner sign the new Enhanced Learner Plan (or initial the changes to the plan)

Retain a copy of the new/updated Enhanced Learner Plan in the learner's file

Learner Plan Development produces the learner plan to describe the goal path. It includes the learner's goal, background information, assessment results, milestone tasks, culminating task, learning activities, program duration, additional supports required by the learner, and referral results.

Learner Plan Development (Guidelines)

The learner plan describes the goal path, and includes the learner’s goal, background information, assessment results, milestone tasks, culminating task, learning activities, program duration, additional supports required, and referral results.

LBS service providers work with the learner to identify and document the learning activities that prepare them for transition to their goal. The learner plan ensures that learners understand the steps required to achieve their goal, the sequence for training, and the time necessary to achieve the learning identified.

LBS service providers must:

- Ensure that the learner plan:
 - Includes the background information gathered in the learner profile.
 - Identifies necessary referrals throughout the process.
 - Identifies the learner’s goal path.
 - Details the learning activities to prepare learners for their goal path.
 - Identifies milestone tasks that the learner needs to successfully demonstrate.
 - Identifies the culminating task.
 - Considers whether e-Channel delivery is appropriate for the learner.
 - Indicates dates and establishes time lines (date the learner plan was developed, start date and projected end date for learner’s program, estimated time per week learner commits to their LBS training which includes both supervised and independent study and, dates for the learner and LBS Service Provider staff to review progress).
 - Includes any other non-LBS requirements (certificates, courses, abilities) of the learner’s goal path.

- Establish a process for regular and timely review of learner achievements, including successfully demonstrated milestone and culminating tasks, and other assessment results which indicate progress towards completion of goal path. If the learner is not on track or if the learner’s goal has changed, the learner plan is revised to reflect changes in learning activities and expected outcomes.
- Provide the learner with a copy of the learner plan and keep a copy on file. Learner files must be made available for review by Ministry staff.

4. Evidence of learner progress (see Section 3.1 Roles and Responsibilities);

Category of INFORMATION	Confirmation Activity	BASIS FOR THE EVIDENCE			DOCUMENTATION AND RECORDING				Notes
		Organizational Policy, Procedure, or Process (Documented where?)	In-House Tools (paper?) Used (Samples where?)		What is Documented in Local Systems	Copy of In-House Tool Kept (/where)?		What is Documented in EOIS-CaMS	
	Evidence of Completed Milestones								
	Evidence of Completed Culminating Tasks								
	Marked Record Sheets								
	Tracking Cards/Sheets								

Category of INFORMATION	Confirmation Activity	BASIS FOR THE EVIDENCE			DOCUMENTATION AND RECORDING				Notes
		Organizational Policy, Procedure, or Process (Documented where?)	In-House Tools (paper?) Used (Samples where?)		What is Documented in Local Systems	Copy of In-House Tool Kept (/where)?		What is Documented in EOIS-CaMS	
	Completed Assignments and/or Tests (related to the Learner Plan)								

5. **Training Support** documentation, if applicable;

Category of INFORMATION	Confirmation Activity	BASIS FOR THE CONFIRMATION			DOCUMENTATION AND RECORDING				Notes
		Organizational Policy, Procedure, or Process (Documented where?)	In-House Tools (paper?) Used (Samples where?)	Documentation Provided by Client	What is Documented in Local Systems	Copy of In-House Tool Kept (/where)?	Copy of Client Provided Documentation Kept (/where)?	What is Documented in EOIS-CaMS	
	Application for Training Supports								
	Learner's proof of income								
	Evidence of exceptional transportation requirements								
	Summative report on childcare and transportation expenses								
	CRA tax form (if applicable)								

Commented [AC6]: Organization Training Support Policies
 To administer their training support funds, organizations are responsible for developing and implementing policies and procedures which include:

- Eligibility criteria for learners, and the documentation they must provide to establish need and to verify expenses;
- Eligible child care service providers (cannot be the learner's spouse or relatives living with the learner);
- Eligible expenses, for example, maximum rates for child care, public transit, private cars, car pools, and parking; and
- Policy and procedures for payment, including direct payment to learners; and indirect payment to suppliers, and circumstances where advance payment may be possible.

Category of INFORMATION	Confirmation Activity	BASIS FOR THE CONFIRMATION			DOCUMENTATION AND RECORDING				Notes
		Organizational Policy, Procedure, or Process (Documented where?)	In-House Tools (paper?) Used (Samples where?)	Documentation Provided by Client	What is Documented in Local Systems	Copy of In-House Tool Kept (/where)?	Copy of Client Provided Documentation Kept (/where)?	What is Documented in EOIS-CaMS	
Receivable				Expense Receipts (e.g. Taxi, Childcare)					
Payable				Signature for payment					
	Attendance								

6. LBS Program Exit and Follow-Up **Form** (see Section 5.9 Program Forms).

Category of INFORMATION	Confirmation Activity	BASIS FOR THE CONFIRMATION			DOCUMENTATION AND RECORDING				Notes
		Organizational Policy, Procedure, or Process (Documented where?)	In-House Tools (paper?) Used (Samples where?)	Documentation Provided by Client	What is Documented in Local Systems	Copy of In-House Tool Kept (/where)?	Copy of Client Provided Documentation Kept (/where)?	What is Documented in EOIS-CaMS	
Mandatory MTCU EO Exit Form	Completion of form								
Mandatory MTCU Follow-up Form	Contact client. Solicit and document responses to questions.								3 month 6 month 12 month

Miscellaneous (not Decisions not on required forms)

Category of INFORMATION	Confirmation Activity	BASIS FOR THE CONFIRMATION			DOCUMENTATION AND RECORDING				Notes
		Organizational Policy, Procedure, or Process (Documented where?)	In-House Tools (paper?) Used (Samples where?)	Documentation Provided by Client	What is Documented in Local Systems	Copy of In-House Tool Kept (/where)?	Copy of Client Provided Documentation Kept (/where)?	What is Documented in EOIS-CaMS	
Learning Styles Inventory									
Program specific release of information authorization									

Commented [AC7]: Where is this entered?

