

Gateway Centre for Learning - Adult LBS Program

Learner Data Entry Checklist

Learner Name: _____

- Documents:**
- Participant Registration Form (signed)
 - Gateway Learning Plan Worksheet(s)

EOIS-CaMS Data Entry Checklist

Data Entered By: _____ Date: _____

<input type="checkbox"/> Register Person			
<input type="checkbox"/> Enter Learner Details, Address and Contact Information. <input type="checkbox"/> Record Person Reference and Case Reference on form.			
<input type="checkbox"/> Background:		<input type="checkbox"/> Education: Y/N	<input type="checkbox"/> Employment: Y/N
<input type="checkbox"/> Create Service Plan			
<input type="checkbox"/> Complete Client Summary			
<input type="checkbox"/> Submit Service Plan for Approval (status will be "Approved" or "Active")			
<input type="checkbox"/> Create Plan Summary and download in English			
<input type="checkbox"/> Record Case and Person Reference Numbers on MAESD PRF & Gateway Learner File Summary			
Plan Content (Use Learner Plan Worksheets or other supporting documents for referrals and supports)	<input type="checkbox"/> Sub-goal(s)	<input type="checkbox"/> Competencies <input type="checkbox"/> Learning Activities	
		<input type="checkbox"/> Referrals Out to Other Agencies/Services	
	<input type="checkbox"/> Plan Item(s)	<input type="checkbox"/> Training Supports	
		<input type="checkbox"/> Existing Start Date(s) for Plan Item(s)	
Plan Summary	<input type="checkbox"/> Printed	<input type="checkbox"/> Upload Plan	<input type="checkbox"/> Signed
<input type="checkbox"/> Update Plan Summary Status to " Accepted " Date: _____			

Data Entry Verification

Verifier: _____ Date: _____

Action Required: Yes/No (If Yes, supply details below) – note any changes made in comments section of CaMS as well.

Register Background Service Plan Client Summary Plan Content Plan Summary

Other Actions Required

- Confirm order and contents of Learner File using the Learner File Summary Sheet
- Entered in **CaMS Cross Checking Log**
- Add to "**All Learner Tracking**"
- Cross checking confirmed in **CaMS Cross Checking Log**

EOIS CaMS DATA ENTRY CROSS CHECKING PROCEDURE

- Have **CaMS Cross Checking Log** and **Learner File Ready**: Checklist, Learner File Summary Sheet, Signed MAESD Participant Registration Form (MAESD-PRF), Learner Plan Worksheet(s), Training Supports, Referral Forms.
 - **For any changes made during cross checking**: *consult with original data entrant as needed; note changes in CaMS notes sections, on form and/or on checklist*

 - Sign into CaMS
 - From the search box “Enter Reference Number” enter Case Reference Number.
 - Click client name (“Primay Client”) > Person Home > confirm information is correct from the registration form.
 - To change **Contact Information** select “Contact Tab” from Participants menu; alter categories as needed.
 - Select Background Tab to **confirm Education and Employment**
 - Select Cases Tab: under Service Plans > Select **LBS Case Reference number** (NOT EO Case Reference Number).
 - From **Service Plan home screen**: Confirm “Owner”, “Service Delivery Site”, “Goal”, “Referred In” fields against top of page 4 MAESD-PRF
 - Select Client Summary > select the arrow next to the name> check information against Client Summary section of MAESD-PRF; edit as needed note changes in comments
 - Select Plan Content Tab
 - check Sub-Goals and Plan Items against Learner Plan Worksheets
 - Check for Expected Start and Expected End dates as well as the actual dates; update as needed
 - Check for Training Supports or Referrals out as applicable
 - Check Service Plan Approval (signature on Learner Plan printout in file): select Plan Summary Tab> status should be “Accepted” or “Active”
 - Click “View” to confirm or enter plan acceptance date as applicable
 - Enter your name and the date on the **Checklist** under “**Data Entry Verification**” note any actions taken/changes made. If changes must be made note on sticky note and return to Data Entry Person or Adult Program Coordinator as appropriate.
 - Initial **CaMS Cross Checking Log** to confirm cross checking is complete.
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Exit Cross Checking

- Search Case Reference Number > Ensure status is “Closed” > Events Tab > View Event List > Ensure Follow Up Date has been generated/recorded > initial cross checking log