



Community Living BC Periodic Report for Employment Practice Guidance

Instructions for Completing the PRE
May 2025

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Why you should read this document

Since April 1, 2020, employment service providers have been submitting a quarterly Periodic Report for Employment (PRE) to CLBC for Employment Services delivered.

CLBC uses data from the PRE to report to the federal government on the use of funding for Employment Services received through the [Workforce Development Agreement](#) (WDA). The WDA is the federal and provincial agreement for employment funding.

This guide provides employment service providers with information to support them to complete, and submit, the PRE using the Secure File Transfer Service (SFTS). Using the SFTS ensures people's personal and identifying information is protected.

There are 2 videos that will assist service provider to submit their Periodic Report for Employment, via the SFTS, that can be found on the [Periodic Report for Employment Toolkit](#), on the CLBC website.

Service Provider Responsibility for Privacy

As per privacy legislation, service providers must ensure they have signed consents on file for every individual.

[Recommendations for Service Provider Consent](#)

[document can be found here](#). Consents ensure the individual is aware of why their identifying and personal information is being collected, and how it will be used.

* Under no circumstance should a Periodic Report for Employment be sent by email, as it can put a person's personal and identifying information at risk. Reports must be submitted to CLBC using the SFTS only. Please do not password protect your report, as the SFTS ensures reports are safe and secure. CLBC staff, including Liaison Analysts, will be able to access PRE reports through an internal process once the PRE's have been submitted through the SFTS, and mandatory information is removed.

Mandatory Data for the WDA

The WDA requires employment service providers collect mandatory identifying information from people accessing CLBC employment services. CLBC is collecting this data through the PRE.

The mandatory information includes:

- First and last name
- Home address
- Birth date
- Social Insurance Number (SIN)

Governments have asked for this information, to better understand how Employment Services are helping people.

Find out more by reading the resources posted here:

[PRE Toolkit](#)

Setting yourself up for success to complete your PRE

All CLBC service providers with an employment contract must submit a PRE (quarterly), for each employment contract they hold, for the entire period the contract is in pay. This includes if a provider is supporting individuals (or not) and/or if the contract begins or ends within the quarter of the reporting cycle. All data entered into the report is important, as it helps CLBC, and providers, understand what is working for their Employment Service, and where supports can be strengthened.

The federal government has established very tight timelines for reporting on employment funding, through the WDA. This means both CLBC and employment service providers need to plan, and organize, to meet the strict deadlines for reporting.

CLBC is accountable to the WDA for employment funding. Clear timelines have been set for the completion and submission of PRE's.

Here are a few tips to set your organization up to be successful in completing the PRE reports on time:

1. Decide, as an organization, where you will save PRE reports.

- ✓ Each quarter, you will use the last quarter's PRE report to create your new report. You will update the previous quarter's report and re-save it as per the naming convention (see page 23). Using the previous report will save you an enormous amount of work (starting again means you must re-enter all data for all individuals rather than just entering changes, or new individuals).

2. Save the dates your organization will receive the invitation to the Secure File Transfer Service (SFTS) for each quarter (see page 25 for report deadline and SFTS dates).

- ✓ This will make sure you are accessing the SFTS link within the 7-day period (the link only stays open for 7 days after which time you will need to make a request, through the CLBC Service Center, to send a new link).

3. Update your PRE report throughout the quarter.

- ✓ This will make it easier for you to keep up with any changes for individuals and help you to be ready to submit your PRE report by deadline.

4. Check your organization's dedicated employment email inbox often.

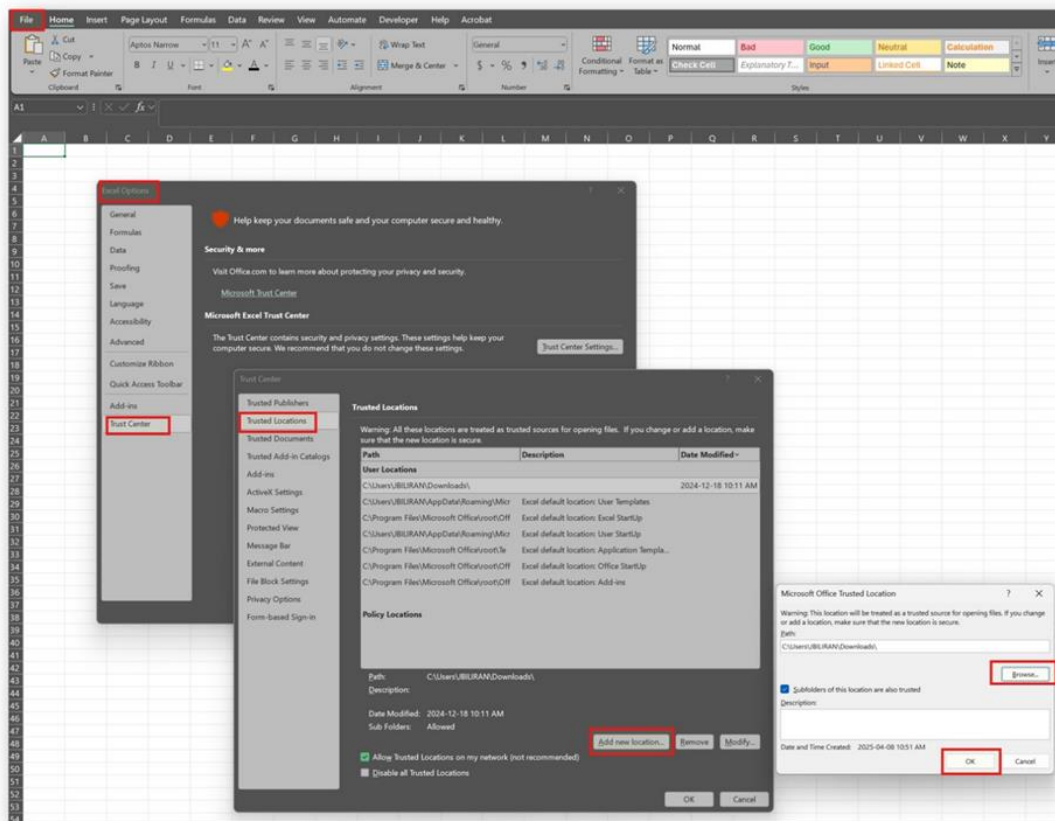
- ✓ This is the inbox you set up to receive the links to the SFTS. CLBC will send you the quarterly invitation to the SFTS so you can submit your PRE. CLBC also uses this email address to provide your organization with important information and updates about the PRE, Employment Services, and training.

5. How to Enable the Macro

- ✓ This is a common Excel security setting that can prevent the macro from running—but the fix is simple.

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- ✓ Save the document to a folder on your computer.
- ✓ Add that folder as a **Trusted Location** in Excel by following these steps:
 - a. Open **Excel**
 - b. Click **File**
 - c. Select **Options**
 - d. Go to **Trust Center**
 - e. Click **Trust Center Settings**
 - f. Select **Trusted Locations**
 - g. Click **Add new location**
 - h. **Browse** to the folder where you saved the document
 - i. Click **OK**



Introduction to the Periodic report for Employment

Home Tab

The “Home” page tab, at the bottom left of the PRE, allows you to see a list of all the individuals served under the contract; you can use this page to navigate to each person’s individual tab. Every individual served on the employment contract will have their own individual tab that is automatically assigned a unique Tab (File) Number. By looking at the “Status” column on the Home page, you can see if the individual’s file is “active or closed”. For convenience, by clicking on a person’s Tab (Ind.1, Ind. 2, etc.) you can go directly to their unique tab.

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Individuals on the PRE are organized on the Home tab by their “open and closed” status. Individuals with open files will be at the top of the Home tab, and closed files will be located below. These separate lists will also be color coded and alphabetized for convenience, and ease of use.

Note: In the upper right corner of each person’s tab, there is a Home button that looks like this:  This is a very user-friendly feature that makes toggling from tab to tab much easier.

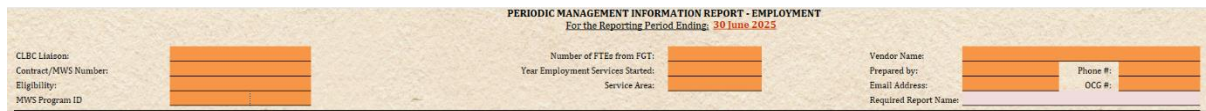
Definitions Tab

The “Definitions” tab will help you better understand PRE related terms and help improve accuracy of data entry. Please choose the best answer for PRE data requests, based on the definitions provided (see Appendix A for the list of definitions). Many definitions have come directly from WDA expectations and guidelines. CLBC specific terms have been defined collaboratively with a team of CLBC staff and employment service providers.

Practice Guidance Tab

The “Practice Guide” tab contains the Periodic Report for Employment Practice Guidance document. You can also find a PDF copy of the practice guidance in the Employment Toolkit on the CLBC website here: [Periodic Report Practice Guide](#).

Getting Started: Report Summary Tab



The screenshot shows the header section of the 'PERIODIC MANAGEMENT INFORMATION REPORT - EMPLOYMENT' form. It is titled 'For the Reporting Period Ending: 30 June 2025'. The form contains several fields for data entry, organized into three main sections: CLBC Liaison, Vendor Information, and Employment Details. The fields are as follows:

CLBC Liaison:	Vendor Name:	Number of FTEs from FGT:
Contract/MWS Number:	Prepared by:	Year Employment Services Started:
Eligibility:	Email Address:	Service Area:
MWS Program ID:	Required Report Name:	

Completing the Header

The first step when completing the PRE template is completing the “Header” of the report. It is located at the top of the “Report Summary” tab. * The header section of the Report Summary tab is the only section of the Report Summary that requires data entry, every reporting period. It is critical the header be completed, in entirety, to ensure CLBC can ensure that your organization has submitted a PRE for each employment contract you hold. The graphic above shows you where you will need to enter information about your employment contract.

For the Reporting Period Ending (includes drop down feature)

This field indicates the last day of the current reporting period (for example, June 30), which is different from the deadline for submitting the PRE. This date must be updated each reporting period; dates from all PRE reports must match, so CLBC is able to consolidate provincial quarterly data and report to our provincial and federal funders. You can enter the date manually or choose the date using the drop-down menu.

* The “For the Reporting Period Ending” field is very important because the data in the individual tabs calculate from this date. Service end dates for individuals are calculated using the report period end date.

CLBC Liaison Analyst

CLBC contact person for the Employment Service contract and/or for your organization.

Number of FTEs from Budget Estimate Tool (BET)

“Full Time Equivalent” is a unit of measure for the number of staffing hours, or “equivalent to full time positions” assigned to the contract (for example: 1 FTE = 35 hours or 0.5 FTE = 17.5 hours). The number of weekly direct staffing service hours are found on Tab 2a / Line 21 / Column W of your organization’s BET. Supervisory related information is also found on Tab 2a of your organization’s BET.

* Please ensure that the FTE is up to date and accurate for each PRE.

Vendor Name

You are required to enter the full legal business name of your organization, not an acronym or the specific employment program name. The full legal name is the name CLBC has on file and will ensure CLBC can confirm your organization has submitted your PRE.

* Please ensure that CLBC Head Office is also aware of any name or contact information changes for your organization. This could include email addresses, website addresses, office locations, etc.

Contract/MWS Number

My Workspace (MWS) is CLBC’s Information Management System (IMS) where most contracts are generated. The MWS number is a 7-digit number, usually starting in 314 or 315, and will be located on the front page of your CLBC contract. The template will indicate a red error message if any letters are entered (such as if you enter an old CLBC contract reference number such as AB000CD01). If you are unsure about your MWS contract number, please connect with your Liaison Analyst.

MWS Program ID (Number)

This is another unique identifier for the employment service. My Workspace (MWS) Program Number(s) are created by CLBC and are provided to service providers by their CLBC Liaison Analyst. A contract can have one MWS Program Number with multiple MWS Program Numbers assigned to it. You will need to make sure all assigned MWS Program Numbers are included in the header of the PRE. If you are entering more than one MWS Program Number you would enter one number in the first box, then put all additional program numbers in the second box, separating each number with a semi-colon (;). On April 1, 2020, CLBC added MWS program numbers to referral forms to CLBC employment services. If you are unsure of the MWS Program Number(s) for a particular contract, please contact your CLBC Liaison Analyst.

Year Employment Services Started

The calendar year your organization started to deliver Employment Services.

Prepared by

The name of the person entering data into the PRE template. If there is more than one person entering data decide on one person to be the contact point, in case CLBC needs to follow-up.

Dedicated Email Address

This email address is the “Dedicated Email Address” your organization has created specifically to gain access to the Secure File Transfer Service (SFTS) and receive Employment Service correspondences from CLBC.

Phone Number

The best number to reach the person who completed the report; it can also be a general contact number for your organization. The template will automatically format the phone number. Enter the 10-digit number only, without spaces, dashes, or other characters

Eligibility *(includes drop down menu)*

This field identifies the “CLBC eligibility” stream; Developmental Disability (DD) or Personal Support Initiative (PSI). You cannot report DD and PSI individuals on the same PRE, as data is tracked separately for these two unique contracts.

Service Area or SA *(includes drop down menu)*

Identifies the CLBC Service Area where the Employment Service is being provided. Please ensure you accurately identify the SA, on each PRE.

OCG

The OCG # is a unique 6-digit identifier assigned to a Vendor when they become pre-qualified to provide services for CLBC. It is included on the PRE to ensure data is aligned with the correct Vendor. You will need to enter this number in the header the first time you use the PRE template. If you are unsure what your OCG number is, please contact your CLBC Liaison Analyst.

Required Report Name

This field will autogenerate the name you to use when saving your report to submit to CLBC, via the Secure File Transfer Service (SFTS). You must use this autogenerated name as that will ensure CLBC can confirm you have submitted your report when you use the SFTS. *As you enter information into the header (Contract #, Eligibility, Reporting Date, QS Area and Vendor Name), the template will auto populate the name of the report in the correct naming convention.

Report Summary Tables *(No data entry is required)*

The “Report Summary” tables are automatically calculated and populated, consolidating data entered across all individual tabs within the report. (Note: The data displayed in the Report Summary Tab reflects information as of the Reporting Period Ending date (in the header). * Services that were ended during the reporting period will not be included in the totals.

Data is Helpful for Your Organization

The purpose of the PRE is not to only meet reporting requirements of WDA, but also to learn about, and better understand, CLBC Employment Services. PRE data can be a useful tool that enables your organization (and CLBC) to understand how your Employment Services are being utilized.

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Feedback from CLBC employment service providers has shaped how the data is collected in the individual tabs, consolidated, and populated / shared in the Report Summary Tab. The Report Summary Tab provides data analysis of the employment service, which can help identify patterns or trends in service delivery.

The Service Summary & Statistics table in the Report Summary Tab is a great place to start reviewing the data. You will find information which includes “Average Days to Employment, Number of People Served, Total Individuals Currently Employed, Skills Development, WorkBC collaboration, etc.

Information in the Report Summary Tab can provide a service provider with a quick glance of the overall Employment Service, with information that includes:

- ✓ Number of referrals during quarter.
- ✓ New jobs started during the quarter.
- ✓ Total number of people employed.
- ✓ Average days to employment.

Completing the Individual Tabs

The Individual Tabs are where the bulk of data entry happens. These (green) tabs are found at the bottom of the PRE. Individual tabs can be accessed by clicking the green tab, or (more conveniently) by accessing the Home Tab, as previously mentioned. A WDA Checklist Form has been created as a resource for service providers, which can be found [here](#).

As information is entered into each Individual Tab, the template will automatically populate the Individual Summary and the Report Summary.

* Note that each person served should have their own (and only one) tab. If an individual leaves service and then comes back you will need to (1) delete the Closure Section information in the individual’s tab, (2) enter a new intake date, and (3) start reporting the new services being provided. Do not delete the old employment records for this individual unless you need space in the report.

*Do not delete the entire tab as this will create errors in the template.

Community Living BC		
Intake Date	File	Status
PERSONAL INFORMATION		
Last Name	First Name	Street Address
Date of Birth (ddmm/yyyy)	Age	City/Municipality
Social Insurance Number	PRISM Number	Email address
Level of Education	Marital Status	Indigenous Identity
Language Spoken	# of Dependents	Immigration Status & Year
PRE-SERVICE EMPLOYMENT INFORMATION		
Pre-Service Employment Status	Pre-Service Employment Support	

Intake Date

The date the service commences with an individual (intake meeting, first point of contact). Please enter in the DD- MMM-YYYY format (For example: 10Feb2018).

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File

This number is auto populated and corresponds to the individual's tab number (file #7 will be tab #7, for example). These numbers help you navigate easily from the Home Tab to each person's Individual Tab. Note that in the upper right corner of an individual's Tab, there is a Home Page button that looks like this.  Clicking on this button will take you directly back to the Home Tab.

Status

When you enter the last name of the individual, the status will auto-populate as active. Active means the individual is currently receiving some level of employment services.

Personal Information

PERSONAL INFORMATION							
Last Name		First Name		Street Address		Postal Code	
Date of Birth (ddmmmyyyy)		Age		City/Municipality		Province	BC
Social Insurance Number		PRISM Number		Email address		Phone	
Level of Education		Marital Status		Indigenous Identity		Gender	
Language Spoken		# of Dependents		Immigration Status & Year		Visible Minority	
PRE-SERVICE EMPLOYMENT INFORMATION							
Pre-Service Employment Status						Pre-Service Employment Support	

The fields in the Personal Information section are required for WDA reporting. * It is mandatory these questions be asked of all individuals, and a response reported. The definitions for these fields are found in Appendix A of this guide and/or through the Definitions Tab of the PRE template. Many fields have drop-down menus. Drop-down menus are located at the bottom right corner of each field; click on the tiny arrow to find the drop-down menu.

Last Name (Mandatory)

If the individual only has one name, it should be entered as last name. When the user enters the last name, the template will highlight all the mandatory data entry fields in orange.

Community Living BC				Intake Date	File	Status
1						
PERSONAL INFORMATION						
Last Name	Smith	First Name		Street Address		Postal Code
Date of Birth (ddmmmyyyy)		Age		City/Municipality		Province
Social Insurance Number		PRISM Number		Email address		Phone
Level of Education		Marital Status		Indigenous Identity		Gender
Language Spoken		# of Dependents		Immigration Status & Year		Visible Minority
PRE-SERVICE EMPLOYMENT INFORMATION						
Pre-Service Employment Status						Pre-Service Employment Support

First Name (Mandatory)

Enter the full legal name (nicknames or shortened versions are not accepted) for the individual (for example: Sandra BROWN, not Sandi BROWN). If the individual has only one name, the first name is left blank and the name is entered in the last name field.

Date of Birth (Mandatory)

The Date of Birth consists of the year, month, and day of birth and should be formatted DDMMYYYY (for example: 02Feb1990).

Social Insurance Number (SIN) (Mandatory)

SIN numbers are 9 digits, and a valid SIN is required to work in Canada. This field will automatically format the number (such as: 123 456 789). Please enter only the 9-digit number without spaces or special characters. *The cell is validated, so any invalid SIN format will be rejected.

Street Address (Mandatory)

An address consists of a building number / street name / apartment number (if applicable). If the individual does not have an address, the address of the office where they are receiving service can be used. If the individual has an apartment number, please put a hyphen between the unit / suite / apartment number and the street number (for example, 2A-4836 Main Street).

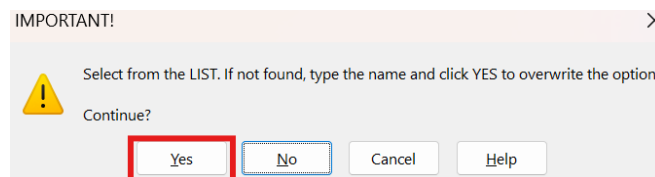
Postal Code (Mandatory)

Postal codes are six characters formatted as L#L#L# (for example: V2J 6T8), where L represents a letter and # a number). If the individual does not have a postal code, you may use your organization's postal code. Enter only the six characters in the correct format, without spaces or dashes and in upper case.

*This field is validated, and incorrect formats will be rejected.

City/Municipality (Mandatory)

This field represents a location commonly recognized as a town, village, city, official municipality, or reserve. It is generally acknowledged locally as having the status of an official municipality or reserve. Begin typing in the field, and relevant options will appear in the dropdown menu. If the desired location does not appear in the dropdown, you can manually enter the name. When prompted to overwrite the validation, click the YES button to confirm your entry.



Age

This field does not require your input. * It will calculate and auto-populate when the individual's date of birth is entered into the template.

PRISM Number

This is the unique identifier number CLBC assigns to eligible individuals. It will be provided by your CLBC Liaison Analyst when a new individual is referred to Employment Services.

Email Address

This field can be left blank if the individual does not have an email address. This field must contain an @ symbol; the field will go red if the field does not have an @. Please review email for accuracy.

Phone Number

Enter the 10-digit telephone number, including the area code. This field cannot be blank. If unavailable, provide an alternative number or enter 'No Telephone.' The field auto-formats (such as: (777) 555-3333). Type only the digits, no spaces or special characters.

Use the “Definitions” tab to help inform the individual on their response for

- ✓ Level of Education
- ✓ Marital Status
- ✓ Indigenous Identity
- ✓ Gender
- ✓ Language Spoken
- ✓ Number of Dependents
- ✓ Immigrant Status & Year
- ✓ Visible Minority

Pre-Service Employment Status

This field captures the employment status of an individual prior to starting their CLBC Employment Service. These questions have drop-down menus. Definitions can be found in Appendix A and the Definitions Tab, found on the PRE template. If an individual already has a job at intake, enter the Employment Details under Job #1, in the Service Actions and Outcomes Section.

- ✓ The start date of the current job would precede the intake date.
- ✓ There would no pre-employment services for a pre-service job.
- ✓ Identify retention services as per usual practice.

* You would capture any (new) Job Preparation / Job Search and Development activities under Job #2. If you are unsure of the difference between unemployed and not in the labour force, please review the definitions in Appendix A.

* Do not change Pre-Service Employment Status following intake. This status does not change.

Pre-Service Employment Support

This field captures what supports were experienced (related to pre-service employment) before entering this CLBC employment service.

Service Actions & Outcomes: Entering Job Services

2 SERVICE ACTIONS AND OUTCOMES									
JOB SERVICES 1									
	Type of Action	Start Date	End Date	Days in Service	Credential Earned	Type of Outcome	Date of Outcome		
A	Job Preparation								
B	Job Search and Development								
ENTER EMPLOYMENT DETAILS BELOW									
Job #	Job Title	Start Date	End Date	Type of Employment	Weekly Hours	Hourly Wage	Business Name	Business Size	Comments
1									
ON THE JOB / RETENTION SERVICES									
	Type of Action	Start Date	End Date	Days in Service	Credential Earned	Type of Outcome	Date of Outcome		
i	On the Job Support / Job Coaching								
ii	Job Maintenance Support								
iii	Job in Jeopardy Support								

What to do if an individual enters service already employed:

As mentioned, if an individual enters an Employment Service with a job, you will enter the employment details in Job #1. You would then indicate which employment service(s) is being provided to support

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the individual with the pre-service job (which would typically only include on-the-job, or retention services). If the individual wants another job, new Job Preparation or Job Search and Development services would be entered under Job Services #2.

If the individual has more than one distinct job with an employer(s), the jobs are recorded separately as Job #1 and Job #2, and so on.

If the individual has more active jobs than space allows, users will delete the oldest job, or ones that are no longer active. Saved reports from previous reporting periods have the archived historical employment information that does not need to be carried forward in each report.

* Do not overwrite Pre-Service Employment jobs; they will appear in red and correspond directly to the Pre-Service Employment Status, at intake. It is important to maintain data about who entered Employment Services with a job.

For each “Type of Action” (sometimes also called a type / stage of service, intervention), enter a start and end date, when appropriate. The Days in Service field will auto populate the number of days based on either: a) the start date and end date; or b) the start date and reporting period end date (see the Header of the report for this date).

* Each active job must have at least one active type of action/service, which includes when the job is seasonal, and the season is over (if the person plans to return to the seasonal job please leave maintenance open). If the person is not returning to the seasonal job, close all actions for that job.

Credential Earned (includes drop down menu)

Indicates when an individual earned a credential because of the service (see definition of Credential Earned in Appendix A, or in the Definitions Tab in the PRE template).

Type of Outcome (includes drop down menu)

The definitions for these fields are found in Appendix A, or the Definitions Tab of the PRE template. Use the definitions to help the individual choose the response that best fits their situation at this stage of their career path. It is important for the WDA requirements to identify an outcome.

Pick the best answer from the drop-down choices, which include:

Job Preparation:

- ✓ Unemployed but available for work
- ✓ Employed
- ✓ Self-employment
- ✓ Not in Labour Force
- ✓ Accessing additional training or education
- ✓ Moving to Job Search and Development
- ✓ Unknown

Job Search and Development:

- ✓ Unemployed but available for work
- ✓ Employed
- ✓ Self-Employed
- ✓ Not in Labour Force
- ✓ Accessing additional training or education
- ✓ Employed AND accessing On the Job/Retention Services
- ✓ Unknown

Date of Outcome

The end date to the Service Action may or may not be the same as “Date of Outcome”. For example, some individuals may access additional training or education, while they continue receiving Job Search and Development Services.

If Outcome is Employment: Enter the Following Employment Details

Job #: No data entry is required. This field will auto populate.

Job Title: This is the individual’s position or primary role with their employer.

Start Date: This is the first day of paid employment. Enter the date in DDMMYYYY (23Aug2024).

End Date: This is the last day of paid employment. Enter the date in DDMMYYYY (23Aug2024).

Days in Service: No data entry is required. The template will automatically calculate the number of days the individual received a specific type of service, based on calculation of start date and end date. Or, if the end date is blank the start date and end date of the reporting period (see the Header of the report).

Type of Employment

The field will have a drop-down menu to choose either regular, short term, seasonal, or self-employment.

Weekly Hours

Enter the total hours per week the individual usually works on the job. *However, if the individual is self-employed or paid by contract, include average weekly hours.

Hourly Wage

Hourly wage must meet labour standards. *However, if the individual is self-employed or paid by contract, average the hourly wage (note: this may not meet minimum wage requirements). If it is below minimum wage, it would be important to make note of the rationale in the general notes section. If/when the hourly rate changes (because of a raise or increase to legislated minimum wage) update this information. If the individual does not want to tell you what they are paid, please input legislated minimum wage. *If you suspect a person is not being paid according to Employment Standards, please contact your QSA or Provincial Employment Team.

Seasonal Employment

If someone got a seasonal job on June 1, 2024, working 20 hours per week for \$17.40, you would:

- ✓ Choose seasonal as the type of employment.
- ✓ Enter the start date for employment.
- ✓ *Do not enter an end date for the job until the job ends, permanently
- ✓ Indicate 20 hours/week
- ✓ Indicate \$17.40/hour
- ✓ Indicate/update real time services you are providing. For example, in April 2025 you reconnect with the employer for the position for this year and in May 2025 you provide on the job support. You will indicate the dates those services start and end.

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Name of Employer:

Important to note: CLBC is asking for the name of inclusive employers, to better understand the prevalence of repeat hiring. CLBC will not release the names of these inclusive employers, and they are not included / forwarded as part of CLBC's reporting back to the federal and provincial funders.

* Employer names are only collected for CLBC and service provider data analysis.

When you are entering the employer, please include the full name of the business. If the person is self-employed, please include name of business, whenever possible.

If an employer has advised they do not want their name reported, then the service provider would manage their own list and in place of employer name they can enter a code. For example, the service provider could decide Tim Horton's South Side become THSS. Every time someone is hired at Tim Horton's South Side, the service provider would enter THSS as the employer's name. This coding will still allow CLBC, and service providers, to see where repeat hiring has occurred.

Business Size (includes drop down menu):

Choose the number that best reflects the size of the business by using the approximate number of staff in the location where the individual is employed.

Adding Additional Job Services Section(s):

When you have reached the Job Services #3 section, you can add additional sections (up to 6) by clicking the green "Add Job Section" button on the top right of the subsequent section.

JOB SERVICES 3							Add Job Section
Type of Action	Start Date	End Date	Days in Service	Credential Earned	Type of Outcome	Date of Outcome	

Skills Development Services

The "Skills Development Services" section allows service providers to record and track information related to skills development training activities. Follow the steps below to properly fill out this section.

SKILLS DEVELOPMENT SERVICES								Add Rows
?	TYPE OF SKILLS DEVELOPMENT TRAINING	DESCRIPTION	CREDENTIAL	Start	End	Outcome	NOC Code	
	Occupational Skills Training							
	Short-Term Training							
	Literacy, Essential Skills, Language Training, and Adult Basic Education							
	Apprenticeship							
	Other - Skills Development							

? The question mark icon in the upper left next to the column header provides a description of the type of training.

Type of Skills Development Training

Dropdown Selection: Click on the dropdown menu under the column "Type of Skills Development Training" (highlighted with a red box). A list of training categories will appear. Select the appropriate option from the following:

- ✓ **Occupational Skills Training:** Refers to funded interventions provided through public or private post-secondary institutions, aimed at leading to a certification or diploma to

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enhance employability for individuals. This category also includes individuals receiving training while employed.

- ✓ **Short-Term Training:** Short-duration training programs, such as certificates or courses (such as first aid certifications, food safety), which are needed to meet specific job or industry requirements.
- ✓ **Literacy, Essential Skills, Language Training, and Adult Basic Education:** Interventions focused on improving literacy, essential skills, and language proficiency. This category also includes support for individuals completing their high school diploma or high school equivalency, as well as any literacy, essential skills, or language training conducted as part of pre-apprenticeship programs.
- ✓ **Apprenticeship:** Refers to employed individuals who are registered with an apprenticeship agency and attached to an employer. Apprentices are released by their employer to attend technical classroom training as part of their apprenticeship program.
- ✓ **Other - Skills Development:** Refers to other skills development activities that do not fall under the previously mentioned categories.

Description

Provide a brief description of the training program. Include details such as the course name, focus area, and any relevant specifics.

Credential

This indicates whether a credential was earned. Use the dropdown to select from the options: Yes, No, or N/A.

Start and End Dates

Input the start and end dates of the training in the respective columns. Ensure the dates are formatted consistently.

Outcome

Document the result or status of the training.

- ✓ Complete
- ✓ Incomplete
- ✓ Failed to Report
- ✓ Cancelled
- ✓ Rescheduled

NOC Code

Enter the National Occupational Classification (NOC) Code relevant to the training.

* As of 2021, NOC codes have been updated to a 5-digit format and are mandatory for Occupational Skills Training.

- ✓ **NOC Code:** CLBC is required to identify the type of job using National Occupational Classification (NOC) Codes. NOC is the national reference on occupations in Canada providing a standard classification for dialogue on the world of work. There are several levels that define the NOC.
- ✓ Definitions for NOC 2021 can be found at:
National Occupational Classification - <https://noc.esdc.gc.ca/?GoCTemplateCulture=en-CA>

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Please copy this URL into your address bar to look for the NOC code which best represents the individual's job. On the website, there is a search function (see image below). Enter the title of the person's job (such as Restaurant Hostess)

- a) In the box titled, "Enter Your Job Title", enter the person's job title, click on Search

The National Occupational Classification (NOC) is Canada's national system for describing occupations. You can search the NOC to find where an occupation is classified or to learn about its main duties, educational requirements or other useful information.

Search by job title Search by NOC code

Version
NOC 2021 Version 1.0

Enter your job title
Example: Banking, insurance and other financial clerks Search

Comparative search Advanced search Search tips

- b) Scroll to Select the Appropriate NOC

64300 – [Mâitres d'hôtel and hosts/hostesses](#) 6 – Sales and service occupations 4 – Occupations usually require a secondary school diploma; or several weeks of on-the-job training ▶ [Matching job titles](#)

- c) Click on the down arrow by Matching Job Titles to confirm you have the right NOC for the person's job

64300 – [Mâitres d'hôtel and hosts/hostesses](#) 6 – Sales and service occupations 4 – Occupations usually require a secondary school diploma; or several weeks of on-the-job training ▼ [Matching job titles](#)

- Host/hostess - restaurant or cocktail lounge
- Restaurant host/hostess

- d) For this example, you would enter 64300 (Restaurant Host) into NOC code field on the PRE.

Adding Additional Rows for Skills Development Services

If more rows are required, click on the "Add Rows" button located at the top right of the section. This will insert a new row for additional training entries.

WorkBC Collaboration

The WorkBC Collaboration section is designed to capture the services provided through WorkBC, to support individuals in achieving employment goals. Below are detailed instructions for using this section.

WorkBC COLLABORATION					
WorkBC Services	DESCRIPTION	Start	End	Comments	
Job Start Supports Wage Subsidy Training Formal Assessments Assistive Technology Other					

Add Rows

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WorkBC Services

Dropdown Selection: Click on the dropdown menu in the WorkBC Services column.

A list of options will appear. Select the appropriate service from the following:

- ✓ **Job Start Supports:** Financial or practical assistance provided to facilitate the commencement of employment. Examples include support for transportation, clothing, and necessary equipment.
- ✓ **Wage Subsidy:** A financial incentive provided to employers to subsidize the wages of a new employee. The duration and amount of this subsidy are variable based on program guidelines.
- ✓ **Training:** Funding assistance provided by WorkBC to cover training costs for eligible individuals. Note that any training funded should also be documented in the Skill Development section.
- ✓ **Formal Assessments:** Evaluations conducted to determine an individual's abilities or challenges in the workplace. Examples include psychological assessments, learning assessments, neuro-psychological assessments, and work simulations.
- ✓ **Assistive Technology:** Equipment or tools provided to support individuals with disabilities or specific needs in the workplace. Typically funded by WorkBC through referrals to third-party experts, assistive technology may include items such as specialized equipment, ergonomic furniture, software, or hardware.
- ✓ **Other:** For services that do not fit into the categories listed above.

Description

Provide a description of the selected service. This might include details such as the purpose, objectives, and scope of the service.

Start and End Dates

Start Date: Enter the date the service begins in the "Start" column.

End Date: Enter the completion date of the service in the "End" column.

Use a consistent date format (for example, MM/DD/YYYY).

Comments

Use this column to provide additional information or notes related to the service. For example, you may note the service provider, progress updates, or any challenges encountered.

Adding Rows

To add additional services, click the "Add Rows" button in the top-right corner of this section (highlighted in red). Each click will insert a new row, allowing you to input more data. You can add up to 6 rows, for a total of 10 rows in this section.

Help Icon



The question mark icon, next to the WorkBC Services column header, offers definitions for the various WorkBC services listed in the dropdown. This provides guidance to help you select the

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most appropriate option.

Closure

Closing is appropriate when an individual declines service, moves out of community, or passes away.

*Closing an Individual's Tab once they are successfully employed is not recommended; maintaining connection with the individual is critical for ongoing success. * Ending employment services should include CLBC Facilitator involvement, as additional planning may be necessary.

CLOSURE						
J	Effective Date of Closure	01 Jun 2025	Reason for Closure	Individual indicates service no longer required	Employment Status at Closure	No longer seeking employment
Comments						

When you enter an Effective Date of Closure and click save, the template will automatically change the status of the Individual tab from Active to Closed.

* It is imperative when your intention is to close an Individual's Tab, to make sure all services are end dated, otherwise the data in the report will not be accurate.

When entering the Date of Closure, please also indicate the Reason for Closing by choosing from the options in the drop-down menu.

Employment Status at Closure (includes a drop-down menu)

Choose the option that best demonstrates the individual's employment status when service ends.

Effective Date of Closure

The effective date of closure is the last day the individual no longer receives employment services.

General Notes

GENERAL NOTES	
(Click Alt + Enter to go to next line)	

The "General Notes" section in an individual's tab is designed to capture essential insights, key learnings, and other relevant information specific to the individual or employer. This section complements and expands upon the numerical data by providing a space for detailed, qualitative documentation.

Examples of how this section can be utilized include:

- ✓ Documenting information related to service delivery (which could include long standing service action(s), training / educational pursuits, and/or life circumstances that impact employment service delivery, etc...)
- ✓ Explaining unique employment details, such as seasonal, gig, contract, or Social Enterprise roles.
- ✓ Encouraging employment service providers to record valuable learnings, ensuring they are available for future reference or use. By leveraging this section, you contribute to a

Periodic Report for Employment Practice Guidance

comprehensive understanding of the individual's situation, enhancing continuity and effectiveness in service delivery.

* Please ensure that General Notes are concise (possibly point form) and *current. This notes section is not intended for service delivery case notes. Notes are only completed, as necessary.

Individual Summary and Statistics

INDIVIDUAL SUMMARY AND STATISTICS

Started service this reporting quarter:	_____	Average number of days to get employment	_____
Number of gained employment this quarter	_____	Average Earning per hour in current employment	_____
Number of current employment	_____	Number of days of continuous unemployment	_____
Total number of weekly hours in current employment	_____	If presently unemployed , date when last job ended	_____
Longest current employment	_____	Job rejected: this Quarter / for the Year	_____
		Enhancements: This Year / Last Year	_____

CLEAR TAB

* No data entry is required for any part of the “Individual Summary and Statistics”. The report will automatically calculate, and populate, using the data entered in each specific individual tab. The data in each Individual Summary Report is about one individual only. Each line of the report is self-explanatory, and handy to check between reporting periods to see changes if/as they occur.

Started service this reporting quarter

This counts the number of individuals with an intake date within the current reporting quarter.

Number of gained employment this quarter

This counts all the jobs for the individual that have a start date within the current reporting period.

Number of current employment

This counts all the jobs that are ongoing/active for an individual as of the report date. Jobs with end dates prior to report date are excluded, as are any jobs that started after the Report Date.

Total number of weekly hours in current employment

This section shows how many weekly hours a person is working in all current ongoing jobs.

Longest current employment

If an individual has more than one ongoing/current job, this identifies the number of days of the oldest of all the current jobs.

Average number of days to get employment

This data captures the number of days it took an individual to gain employment, within the last three years. The time it takes to get a job is calculated from the start dates for Job Preparation or Job Search & Development, whichever is earlier. The average is calculated by adding all the number of days it has taken an individual to find employment divided by the # of jobs in the last three years.

Average earnings per hour in current employment

Wage rate from all ongoing / current employment is averaged by adding the rates then dividing by the number of current jobs.

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Number of days of continuous unemployment

If there is ongoing employment for an individual, this section will state “Presently Employed”. If the individual is unemployed but had previous jobs, the value is calculated by counting the days from when their last job ended and the report date. If there was no history of past employment, the value is calculated by counting the days from the earliest service to the report date.

If presently unemployed, date when last job ended

If the individual had prior jobs, the number you will see in this section is equal to the last end date of their last job. If they have no prior employment history, you will see a value of not applicable or “N/A”.

CLEAR TAB

The **CLEAR TAB** button is designed to completely erase all data within the current Individual Summary and Statistics tab, effectively wiping it clean. When clicked, this action triggers a macro that deletes all personal data associated with the tab. *To prevent accidental deletion, the system will prompt you three times to confirm your intention to proceed. Only after confirming all three prompts will the data be permanently wiped from the tab.



Important Note: Use this feature with caution, as the deletion is irreversible once confirmed. Ensure you have saved or backed up any necessary information before proceeding.

Getting Ready to Submit

Saving Your PRE

Important to Note: Please do not password protect your reports. Password protection is not needed as the Secure File Transfer Service (SFTS) ensures the safety and security of the personal information being sent in your reports.

Saving Your Reports

Before you start to complete your report, it is highly recommended you define where reports will be saved. This will be important because you will be using the last report to start a new report for each quarter, as the report does not house an individual’s employment history. Individual employment histories are housed in previous versions of the report that are saved in your organization’s file storage * (see Terms and Conditions of your contract for file storage requirements).

* If you do not have the last report to use to start your new report, you will need to enter all the data again or request the most recent submitted report be sent (through the Secure File Transfer Service) by a CLBC Provincial Employment Lead.

PERIODIC MANAGEMENT INFORMATION REPORT - EMPLOYMENT			
For the Reporting Period Ending: 30 June 2025			
CLBC Liaison:	CLBC Analyst	Number of FTEs from PGT:	1
Contract/MWS Number:	3149999	Year Employment Services Started:	2021
Eligibility:	DD	Service Area:	North
MWS Program ID:	420565	Vendor Name:	133 Employment Services
		Prepared by:	PRE Analyst
		Phone #:	804-111-2222
		Email Address:	123456789@123
		OCG #:	111110
		Required Report Name:	in: 123 Employment Services 3149999 DD - Jun2025

Naming your report for the first time

As you complete the header information, the template automatically builds the name of your report according to CLBC’s naming convention. * Use this exact format when naming and submitting your report to CLBC via the Secure File Transfer Service (SFTS) as it helps CLBC confirm your organization’s PRE report submissions.

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The easiest way for you to use the exact format when saving is to highlight the name in the Required Report Name line, click CTRL and C to copy the name, click save and then put the cursor in the file name field and Click Ctrl V to paste the correct name. Then click save again. Note: reports will be returned to the sender for corrections if the naming convention is not followed (for example acronyms are used instead of the service provider full name).

Starting your report each new quarter

Open the report from the previous reporting period to start your new report. Service providers do not start fresh and enter data in a new template each reporting period.

- ✓ When the report from the previous quarter is open, click Save As, and re-name the existing report simply by replacing the old reporting period end date with a new reporting period end date.
- ✓ File storage and naming conventions are particularly important to help your organization keep track of previous reports.
- ✓ It is also important that your organization has historical information if you want to learn about someone's employment history with your service.

* The PRE must be stored in Canada as per Terms and Conditions of your organization's employment contract. Please ensure your computer has the level of security needed to store this personal information safely and securely. As stated above, please do not password protect the PRE. All reports will be submitted using the SFTS, which ensures personal information is secure.

Submitting Your PRE

Important Information for ALL CLBC and Agency Staff

The PRE template has mandatory data categories which include identifying and personal information.

* The report must be submitted using the Secure File Transfer Service (SFTS). The SFTS will ensure personal and identifying information is safeguarded and secure.

* It is not acceptable, in any circumstance, to share a PRE report via email. CLBC staff are able to access the PRE reports internally, only after Service Providers submit these reports through the SFTS. Provincial CLBC Employment staff collect PRE reports from the SFTS and store them appropriately for CLBC staff in the regions to review.

* It is imperative reports are not printed or shared externally; this increases risk of a breach of privacy. See the Freedom of Information and Privacy Act Policy for additional information;
(http://www.bclaws.ca/civix/document/id/complete/statreg/96165_00).

Preparing to submit your PRE

Employment service providers are required to have a dedicated employment email to gain access to the SFTS. The preferred format for the dedicated employment email is:

NameofAgency_PREReport@agencyaddress

For example: InclusionCommunity_PREReport@Community.org

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New employment service providers must send their dedicated employment email address to CLBC at clbc.employmentHELP@gov.bc.ca. This will ensure CLBC has a record of your organization's dedicated employment email. CLBC will use this address to send quarterly invitations to the SFTS to submit your PRE report, *and for other employment related communications. The dedicated email address ensures your organization receives the invitation (email) from the SFTS, consistently. The invitation you receive to your dedicated employment email is the only way you can submit your PRE report through the SFTS.

To complete your submission using the Secure File Transfer Service (SFTS), please refer to the [SFTS – Instructions for Employment Service Providers](#) document. This resource contains specific instructions on how the SFTS works.

The email/invitation to the SFTS looks like this:

☐ ☆ Baird, Christina CL.	New File(s) Request is Waiting - New Files Request Notification You have a file request pending for the B...	Sep 13
☐ ☆ BC Secure File Tran.	New User Account for the BC Secure File Transfer Service (filetransfer.gov.bc.ca) - Welcome to the BC Se...	Sep 13

PRE-Submission Videos (click the links below):

1. [Submitting Your report](#)
2. [Secure File Transfer Service](#)

Report Deadlines

Use the following **Pre-Report Deadline Dates Table** to plan your PRE report submissions for each quarter through to 2025:

Quarter	Reporting period	SFTS link sent to service providers**	Report due date**
Q1	Apr 1-Jun 30	5 Business days prior to due date	June 15
Q2	July 1-Sep 30		Sep 15
Q3	Oct 1- Dec 31		Dec 15
Q4	Jan 1-Mar 31		March 15

*Important to Note: In using the table above it is important to note that the date CLBC sends out the link for the SFTS is subject to staffing and hours of operation. If the date falls on a Saturday or Sunday, then the link is sent the next working day. This is also true for when service providers are required to submit their PRE reports through the SFTS; if the date falls on a weekend, providers will submit on the next working day.

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* The SFTS link sent to your dedicated email address stays live for 7 days.

When you click on the link, you will be required to change password. This 7-day window provides you with time to change the password then you can submit your PRE by the deadline.

* If you do not access the SFTS link within 7 days and change the password, your account status will change to inactive and you will need to notify CLBC, via CLBC.employmentHELP@gov.bc.ca to have your account re-activated. Please note, after 14 days, your account is locked out of SFTS, and you will have to contact CLBC again to re-activate your account. These timelines are part of the security features of the SFTS.

Follow the steps outlined in [SFTS – Instructions for Service Providers](#) to complete submission process.

Services delivered between the report due date and the end of the period

The PRE report is an ongoing report format. As services are delivered, and outcomes are achieved, simply record them in the report with the date they occurred. This way you will capture services delivered between the due date to the end of the reporting period in the next report.

* For example, if you make regular entries into the template, any service delivery or outcomes that occur between June 15 and July 1 are included in the September report.

Do you have questions?

If you have any questions about the PRE template, process, and/or the Secure File Transfer Service, please send them to the CLBC Employment Help mailbox at: CLBC.EmploymentHELP@gov.bc.ca.

* Please note, this mailbox cannot accept any PRE attachments. This is to protect the privacy and confidential information of individuals served.

Resources

Resources are located on the CLBC website at this address: www.communitylivingbc.ca/pretoolkit/

[Workforce Development Agreement Info for Self-Advocates](#) (A brochure for individuals and families to inform them about the information requirements of the Workforce Development Agreement)

For Service Providers – [Workforce Development Agreement Intake Checklist](#) (Helps providers gather the new and updated information from individuals)

Recommendations for [Service Provider Consent Form](#) (A template with suggested content providers can use to gain individual's consent to gather identifying and personal information)

[Workforce Development Agreement – Questions and Answers for Service Providers PRE](#)

[PRE Practice Guidance](#) (this document)

[PRE Reporting Deadlines](#) (Outlines for providers when reports are due under the WDA – tables with these dates are also included in this document)

[Secure File Transfer Service – Instructions for Service Providers](#) (Resource for providers to support them to use the SFTS to send in their PRE reports to protect identifying and personal information gathered from individuals)

Demo videos:

1. [Getting Ready to Submit](#)
2. [Using the Secure File Transfer Service \(SFTS\)](#)

Appendix A

Definitions (in alphabetical order)

Accessing training or education: The individual has returned to school or accessing a training opportunity for further education/training because of participation in employment services.

Budget Estimate Tool (BET): This is a document CLBC uses as a budget framework for program negotiations. The BET identifies things like staffing complement, service levels, and how much funding has been allocated for service specifics like facilities costs and vehicle expenses.

Casual Employment: To be considered casual, employment must be unreliable, occasional and unpredictable. If the employment is stable and expected to continue, it would not be considered casual.

Closure: Closing is appropriate when an individual declines service, moves out of community, or passes away. *Closing an individual's tab once they are successfully employed is not recommended; maintaining connection with the individual is critical for ongoing success. *Ending employment services should include CLBC Facilitator involvement, as additional planning may be necessary.

Credential/Certificate Earned: Defined as a degree or certificate that is nationally or provincially recognized, (for example a university degree, college certificate, trades designation, high school diploma or equivalent, food safety certificate, driver's license and/or safety certification).

Date of Outcome: The end date to the Type of Action / Service may or may not be the same as "Date of Outcome". For example, some individuals may access additional training or education, while they continue receiving Job Search and Development Services.

Effective Date of Closure: This is the last day of service, or the last time the service provider connected with the individual, or the day the individual declines service.

Employed: This section only includes people who work in a job or business or have paid work (that meets labor standards) in the context of an employer-employee relationship. This includes those who have a job but are not at work due to factors such as illness or disability, personal or family responsibilities, vacation, labour dispute or other reasons (excluding persons on layoff, between casual jobs, and those with a job to start at a future date). Employment may be permanent or temporary (temporary employment comprises work under a fixed-term contract, in contrast to permanent work where there is no end-date), full-time or part-time.

File: This corresponds to the persons Individual Tab number.

Gender: The options are "male", "female", "unspecified", and "prefer not to report". The "unspecified" category is to capture individuals that identify as non-binary in terms of their gender identity. "Prefer not to report" is to capture any individuals who did not feel comfortable reporting their gender.

General Notes: The area is used when there is a need for an employment service provider to provide collateral information regarding the service; notes should be short and concise, and added only when necessary. For example, if a person's service is going smoothly and/or they are stable in employment, there would be no need for a note. Notes should be updated each reporting cycle.

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Notes are effective in situations that could include (but are not limited to):

- ✓ Service disruption (personal/family emergency, extended time away, etc.)
- ✓ Service Action(s) are taking a very long time, which could require a brief explanation.
- ✓ Other.

Hourly Wage: Hourly wage must meet labour standards. *However, if the individual is self-employed or paid by contract, average the hourly wage (note: this may not meet minimum wage requirements). If it is below minimum wage, it would be important to make note of the rationale in the general notes section. If/when the hourly rate changes (because of a raise or increase to legislated minimum wage) update this information. If the individual does not want to tell you what they are paid, please input legislated minimum wage. *If you suspect a person is not being paid according to Employment Standards, please contact your QSA or Provincial Employment Team.

Identifying Information

The Workforce Development Agreement (WDA) requires employment service providers to collect mandatory identifying information from people accessing CLBC Employment Service. CLBC collects this data through the Periodic Report for Employment (PRE). The identifying information includes the following:

- ✓ First and last name
- ✓ Home address
- ✓ Birth date
- ✓ Social Insurance Number (SIN)

Immigrant Status & Year: This section is primarily for people born outside of Canada (note: people born of embassy staff in Canada are considered immigrants). When entering data, Immigrant Status should reflect if the person is a landed immigrant or permanent resident. The person may have Canadian citizenship or may have been granted the right to live in Canada permanently by immigration authorities. Immigration year is to be formatted YYYY. For individuals who do not feel comfortable providing this information, report "0000".

Indigenous Identity: Indigenous identity refers to whether an individual reports being an Indigenous person. This includes First Nations, Métis, or Inuk (Inuit) and/or being a Registered or Treaty Indian under the Indian Act of Canada, and/or being a member of a First Nation or Indian band. The options are Yes, no, or Prefer Not to Report.

Intake Date: This is the date employment services commence (for example the initial call to set an intake meeting). This is not the date the referral was sent to the service provider by CLBC, as there may be a delay in starting the service, post referral.

Job in Jeopardy Support: Support provided specifically for preserving an employee's position with their employer. Usually time-limited or for an unusual event requiring specific support (or re-training) to resolve an issue. May involve additional planning with managers and can be a time where patterns are identified.

Job Maintenance Support: Employment is sustainable, and the individual is working in the role independently and/or with natural support in place. Service provider acts only on a check-in basis (e.g., as needed or requested) with the employee or employer. Intervention required by employee, employer or natural support is minimal with goal to sustain job and/or identify job enhancement opportunities. Maintenance ensures the individual remains connected to services.

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Job Preparation: This support identifies what work the individual will need to complete to be ready to start a job search. Job preparation typically precedes the discovery process, and then takes steps to prepare for job exploration. This may include skill development around time management, hygiene, appropriate behaviour at the workplace, learning about relevant Employment Standards Act legislation and/or personal responsibilities. Job preparation may also include identifying and completing specific training or work experience to build a better resume to meet job requirements.

Job Search and Development: This support includes multiple approaches via a posted competitive job posting, exploring connections/relationships to find potential jobs, or exploring community to uncover jobs that currently may not exist. The Vocational Counsellor works with the employer to develop a new job, customize an existing job, collaborate on developing accommodations / resources to support employee success, or developing a business plan to become self-employed.

Language Spoken: Individuals are asked to identify their federal official language of choice, or the language in which they interacted with service providers to plan for programs/services. The options are “English”, “French”, or “Not a federal official language”.

Level of Education:

- a. Less than high school: Includes individuals who have no formal education and those who have not completed high school or equivalent
- b. High School Diploma or equivalent: Includes individuals who have completed their high school diploma or equivalent
- c. Some post-secondary training: post-secondary program incomplete
- d. Any non-university certificate, or diploma: A certification, diploma, or degree from a post-secondary institution that is not a university, includes vocational or apprenticeship training
University Certificate or Diploma: A certification or diploma from a university that is not a formal degree
- e. University Degree: Bachelor’s, Master’s, or Doctoral degree from a university
- f. Other: Any educational qualifications that do not fit in the above-described categories
- g. Prefer not to report: For those individuals who prefer not to report their highest level of education

Married or equivalent: An individual who is married and has not separated or obtained a divorce, and whose spouse is still living or an individual who is living in a common-law relationship with another person but who is not legally married to that person.

My Workspace or MWS: A CLBC information management system that contains most contract information, including information from the Funding Guide Template or FGT. CLBC employment contracts are identified using an MWS number which is 7 digits (for example 3141212 or 3150007). The MWS number should not be confused with CLBC’s old contracting system reference numbers. These old numbers include letters (such as CB0202AD00). The PRE will indicate red if letters are entered in the MWS field.

MWS Program ID: The program number is another identification method that is generated in CLBC’s contract program. This number is a 6-digit number and is located on Page 3 of the FGT and not on the hard copy of the contract. There can be multiple MWS Program Numbers assigned to a specific contract. These numbers allow CLBC to understand how different services are using employment funding.

Name: The first and last name of the individual is their full legal name. A nickname or shortened version (such as Rob for Robert or Sandy for Sandra) is not a correct entry. Entering this data into the template is mandatory for all individuals.

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NOC Code: The National Occupational Classification (NOC) is Canada's national system for describing occupations.

Not in the labour force: People not in the labour force are defined as those who, prior to service, were unwilling or unable to work. This category also includes discouraged workers who want to work but are not currently looking for work because they believe no suitable work is available.

Number (#) of Dependents: A dependent 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, or adoption, may be a foster child, or is an adult dependent (such as an adult offspring with a disability).

OCG # (Number): The OCG # is a 6-digit unique identifier assigned to a vendor when they become pre-qualified to provide services for CLBC. This number is included in the PRE to ensure data is aligned with the correct vendor.

On the Job Support/Job Coaching: Job coaching usually happens at the beginning of a new job when the individual learns to complete the new tasks assigned by the employer or when the individual, employer and service provider are figuring out the working relationship. On the job support can happen when new duties are assigned or the position changes for some reason (such as a new manager). Generally, these services are job specific supports to assist the employee to learn and complete their job duties (develop soft skills), create independence, and develop natural supports. These services also include supporting the employer/workplace to increase understanding of having a co-worker with diverse abilities in their organization. Good on the job support can minimize job in jeopardy situations.

PRISM Number: This is the unique identifier number CLBC assigns to eligible individuals. It will be provided by your CLBC Liaison Analyst when a new individual is referred to Employment Services.

Periodic Report for Employment (PRE): CLBC Employment Service is governed by the Workforce Development Agreement which requires CLBC to use a periodic report, submitted quarterly by the service provider to CLBC. CLBC is then required to report consolidated data on time to government partners. Data from the PRE is also used by CLBC to track employment outcomes, to inform funding decisions, and support monitoring of the service.

Prefer not to report: The WDA requires the collection of personal information about the individual; five of the mandatory questions require answers: first and last name, address, birthday, and SIN. The other mandatory questions have allowances for those individuals who do not feel comfortable reporting, by having the option to choose "Prefer not to report." This option is an acceptable answer only where it exists in the drop-down choice in the template.

Pre-service Employment Status: This is the persons employment status at time of intake. This status is fixed and does not change following intake. The start date for this job would "pre-date" the intake date, of the person, into service. There would be no pre-employment services provided for this job.

Pre-service Employment Support: If a person is employed at time of intake, this drop-down section refers to what (if any) support they received (such as high school employment support, high school work experience, WorkBC, other employment services, or no prior services).

Regular Employment: Position could be full-time or part time. The individual can depend on consistent hours over the calendar year and the job is understood to be ongoing. The end date is unknown.

Seasonal Employment: Seasonal work is understood to be employment that is agreed to be for specific times of the year only, like summer or Christmas. Sometimes seasonal work re-occurs each year as the season/employer dictates.

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Self-Employed: The individual has started a business, or they are working via contract (including gig or event-based). The individual gets paid directly and is responsible for paying their Employment Insurance (EI), CPP, and Income Tax. Self-employed individuals are working owners of an incorporated or unincorporated business, farm or professional practice/service, with or without paid help. The “unincorporated” group includes self-employed workers who do not own a business (such as babysitters, couriers, and newspaper carriers).

Short Term Employment: Position could be full-time or part-time and is time limited with an expected end date. The individual can depend on consistent hours over a short-term period. The employer and employee have agreed on a period of work/time or a piece of work, whereby the end date is planned and usually known. Short term employment is sometimes called gig or contract work meaning the employment may be inconsistent, driven by economy and/or only available until a task is completed.

Single: An individual who has never been married, a married individual who is no longer living with his/her spouse (separated) and has not remarried, an individual who has obtained a legal divorce and has not remarried, and an individual who has been widowed and has not remarried.

Skills Development Services:

- ✓ **Occupational Skills Training:** Refers to funded interventions provided through public or private post-secondary institutions, aimed at leading to a certification or diploma to enhance employability for individuals. This category also includes individuals receiving training while employed.
- ✓ **Short-Term Training:** Short-duration training programs, such as certificates or courses (such as first aid certifications, food safety), which are needed to meet specific job or industry requirements.
- ✓ **Literacy, Essential Skills, Language Training, and Adult Basic Education:** Interventions focused on improving literacy, essential skills, and language proficiency. This category also includes support for individuals completing their high school diploma or high school equivalency, as well as any literacy, essential skills, or language training conducted as part of pre-apprenticeship programs.
- ✓ **Apprenticeship:** Refers to employed individuals who are registered with an apprenticeship agency and attached to an employer. Apprentices are released by their employer to attend technical classroom training as part of their apprenticeship program.
- ✓ **Other - Skills Development:** Refers to other skills development activities that do not fall under the previously mentioned categories.

Social Insurance Number (SIN): A nine-digit number that is a unique identifier and is necessary for a person to have to work in Canada. The SIN is also a requirement to access certain government services and programs, including EI. The government of Canada uses SIN numbers to link data to assess long term outcomes of participation. This data is mandatory for all individuals.

Status: This indicates if a person’s service is active or closed.

Street Address: An address consists of a building number/street name/apartment number (if applicable). If the individual does not have an address, the address of the office where they are receiving service can be used. Please use a hyphen between the unit / suite / apartment number and the street number (for example 2A-4836 Main Street). Do not use the number (#) symbol. This data is mandatory for all individuals.

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Service Action (sometimes referred to as an Intervention): These actions are collected in the Periodic Report for Employment (PRE) . There should be at least one active type of action or intervention for each active individual in the service, which means a start date and no end date. The types of documented actions include any of the following:

- ✓ Job Preparation
- ✓ Job Search and Development
- ✓ On the Job Support / Job Coaching
- ✓ Job Maintenance Support
- ✓ Job in Jeopardy Support

Unemployed: Individuals on work experience who are unpaid or receiving non-wage support are considered unemployed. The individual has not obtained employment and will not be participating in further services.

Unemployed but available for work: Individuals who (a) are on temporary layoff with an expectation of recall and are available for work, or (b) are without work, have actively looked for work in the past four weeks, and are available for work, or (c) have a new job starting within four weeks from referral and are available for work.

Unknown: The individual is no longer participating in the service and cannot be contacted to determine an outcome.

Visible Minority: Visible minority refers to whether an individual belongs to a visible minority group as defined by the Employment Equity Act. The Employment Equity Act defines visible minorities as "persons, other than Indigenous peoples, who are non-Caucasian in race or non-white in colour".

Weekly Hours: The total hours per week the individual usually works on the job. *However, if the individual is self-employed or paid by contract, include average weekly hours.

WorkBC Collaboration: Services provided through WorkBC, to support individuals in achieving employment goals. Below are detailed instructions for using this section.

- ✓ **Job Start Supports:** Financial or practical assistance provided to facilitate the commencement of employment. Examples include support for transportation, clothing, and necessary equipment.
- ✓ **Wage Subsidy:** A financial incentive provided to employers to subsidize the wages of a new employee. The duration and amount of this subsidy are variable based on program guidelines.
- ✓ **Training:** Funding assistance provided by WorkBC to cover training costs for eligible individuals. Note that any training funded should also be documented in the Skill Development section.
- ✓ **Formal Assessments:** Evaluations conducted to determine an individual's abilities or challenges in the workplace. Examples include psychological assessments, learning assessments, neuro-psychological assessments, and work simulations.
- ✓ **Assistive Technology:** Equipment or tools provided to support individuals with disabilities or specific needs in the workplace. Typically funded by WorkBC

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through referrals to third-party experts, assistive technology may include items such as specialized equipment, ergonomic furniture, software, or hardware.

Workforce Development Agreement: The federal/provincial agreement that provides funding for CLBC Employment Service as well as other employment services around the province. CLBC must collect mandatory identifying personal information and other employment data to meet the agreement's reporting requirements. CLBC employment service providers are contractually obligated to submit the mandatory information and employment data quarterly, using the Periodic Report for Employment.

Working Quarter: This is the term CLBC is using to define the time between the beginning of a reporting period and the date when the report for that quarter is due. For example, the working quarter for the January 1 to March 31 reporting period is December 16 to March 15. Services delivered between March 16 and March 31 would be captured in the June 15th report.