
OCASE SUPPORT SERVICES TRAINING EVALUATION SUMMARY REPORT

Prepared for the OCASE
Working Group

July 2015

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INTRODUCTION

BACKGROUND

In April 2015, the AIDS Bureau (MOHLTC) launched the revised Support Services Program Description for all AIDS service organizations that provide support services to people living with HIV in Ontario. The EBPU (OHTN) provided training to 29 agencies and 220 staff members that use the OCASE data management system to record information about the support services they provide to people living with HIV. The training consisted of an overview of the new Support Services Program Description, demonstrations of how to record support service activities using the new documents in OCASE (which reflect the reporting requirements outlined in the Support Service Program Description) and time for the participants to practice completing the forms and receive one-on-one instruction and assistance.

SURVEY SAMPLE

The EBPU emailed an invitation to 203¹ individuals who attended the training (and for whom we had a valid email address) to complete a short online survey. Following up to the initial invitation, the EBPU sent two reminder emails about the survey. The survey asked respondents to provide their feedback on the training and their use of the OCASE support service documents. The attendees opened the survey 93 times; however, 18 surveys were blank (with no responses). We received 75 completed surveys, representing a 37% response rate. This report summarizes the key highlights from the evaluation of the training for using the new support service documents in OCASE.

¹ The OCASE team trained additional staff members after the evaluation was live. These individuals did not have sufficient experience using the support service documents in OCASE (at this time) to provide meaningful feedback for the evaluation.

KEY FINDINGS

FEEDBACK ON THE TRAINING

OVERALL SATISFACTION WITH THE TRAINING & LEVEL OF PREPAREDNESS TO ENTER ACTIVITY DATA

Approximately 80% of respondents were satisfied with the training received for using the new support services documents in OCASE

Overall, 79% (55/70) of the survey respondents replied they were 'satisfied' or 'very satisfied' with the training. In addition, approximately 60% of respondents (57%, 39/68) identified they felt 'very prepared' or 'extremely prepared' to enter their support service activities into OCASE after the training.

"For someone who is not computer savvy I think the training [was] very simple and the resources very helpful to navigate the new system. However, the one-on-one support they provide - it's for me, the most important part."

Figure 1

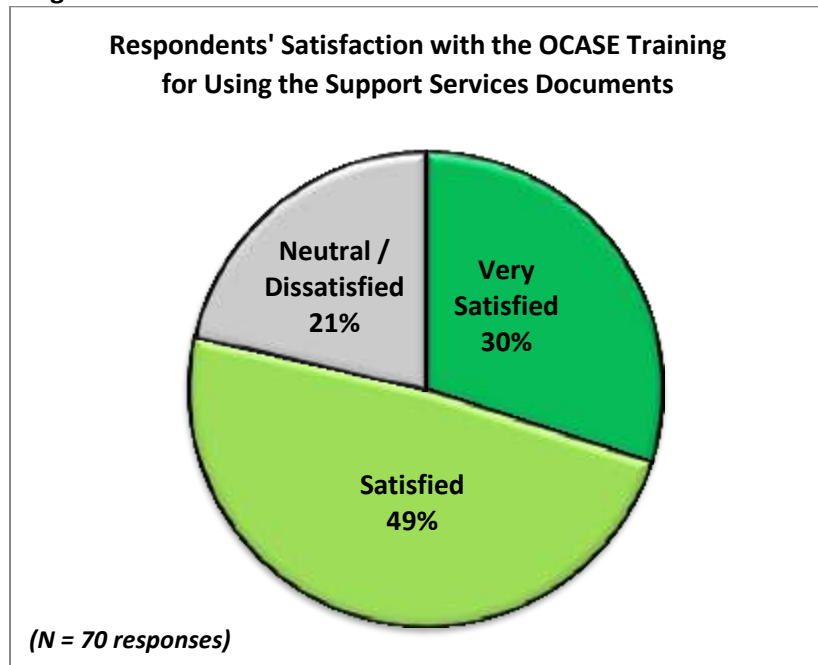
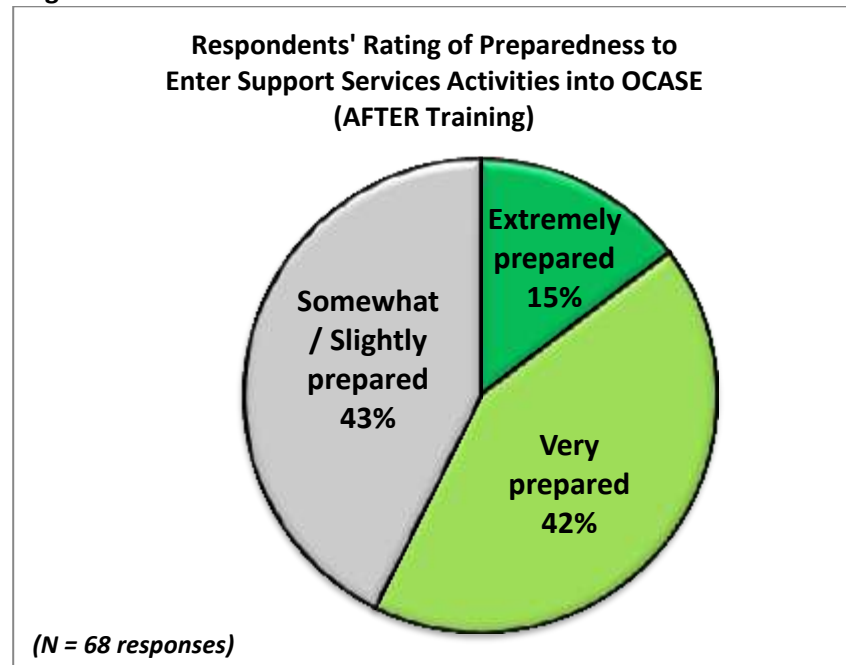


Figure 2



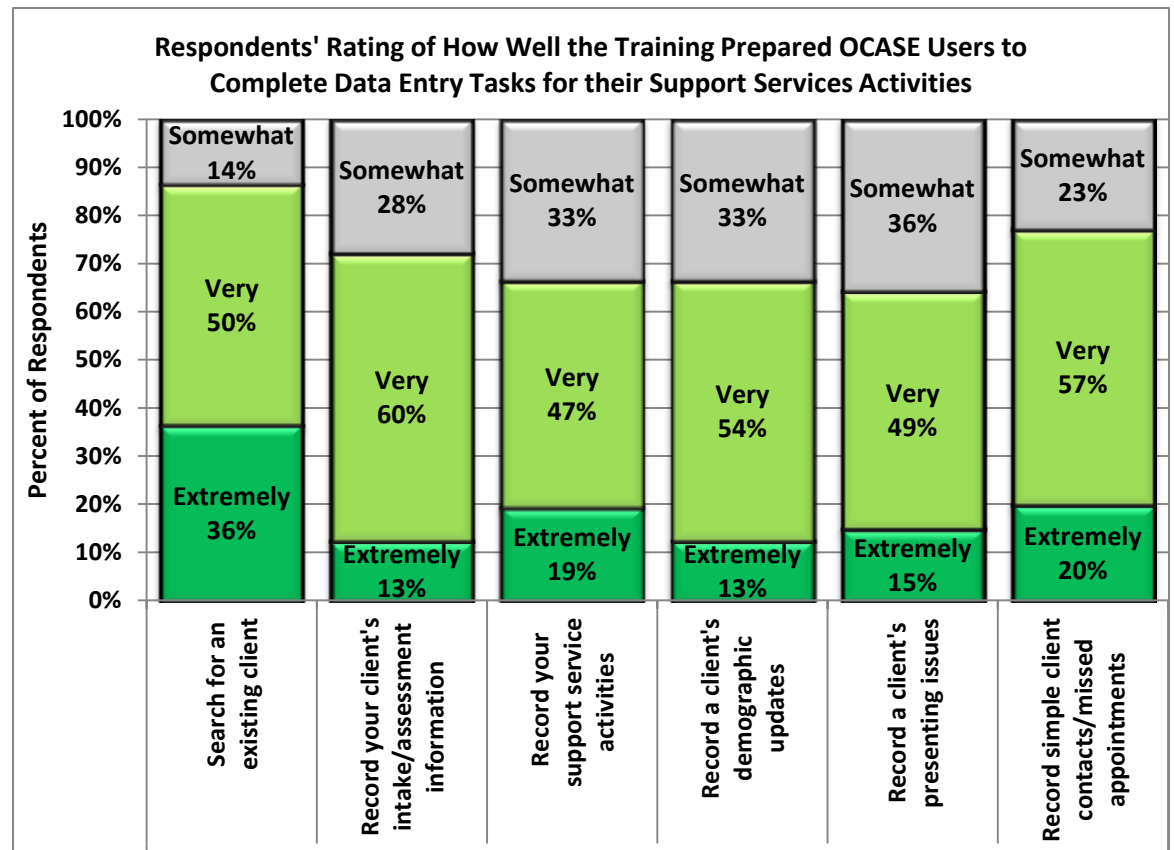
Nearly two-thirds of respondents' state they were 'very well prepared' to complete all data entry tasks for recording support service activities

A minimum of two-thirds of respondents identified that the training had prepared them 'very well' or 'extremely well' to complete the data entry tasks associated with recording their support service activities into OCASE. Respondents' ratings of their level of preparedness ranged from 64% to 86% depending on the support service document or task being completed. More specifically, respondents identified their level of preparedness for each of the following:

- **Searching for an existing client**
 - 86% (64/74) 'very well' or 'extremely prepared'
- **Record a client's intake/assessment information**
 - 72% (52/72) 'very well' or 'extremely prepared'
- **Record support service activities**
 - 67% (48/72) 'very well' or 'extremely prepared'
- **Record a client's demographic updates**
 - 67% (48/72) 'very well' or 'extremely prepared'
- **Record a client's presenting issues**
 - 64% (47/73) 'very well' or 'extremely prepared'
- **Record simple client contacts/missed appointments**
 - 77% (54/70) 'very well' or 'extremely prepared'

Note:
 'Somewhat' includes 'slightly well' and 'not well'
 N = 74, 72, 72, 72, 73, 70 respondents respectively

Figure 3



USEFULNESS OF OCASE SUPPORT SERVICE RESOURCES AND TRAINING MATERIALS

Majority of respondents are aware of OCASE resources

&

*Nearly two-thirds of respondents rated the OCASE resources as
'very' or 'extremely' useful for their work*

In addition to the agency training sessions, the EBPu provided additional training and support materials for recording support service activities. These resources included videos that show how to record activities in OCASE, 'How-to' guides for recording support service activities in OCASE and a downloadable version of the AIDS Bureau Provincial Program Description for Support Services. All resources are available online at <http://www.ohtn.on.ca/evidence-based-practice-unit/>. The OCASE team discussed and showed these materials during the training sessions and emailed all training participants the links to the resources twice (at minimum).

Respondents identified they had used the resources to varying degrees and more than fifty percent of those who had used the resources found them to be 'very' or 'extremely' useful for their work. Refer below for more details of use and usefulness per resource.

- **Videos that show how to record activities in OCASE**
 - 29% (19/66) had used the videos
 - 65% (11/17) rated videos as 'very' or 'extremely' useful
- **"How-to" guides that outline how to record activities in OCASE**
 - 49% (32/65) had used the 'how-to' guides
 - 59% (17/29) rated videos as 'very' or 'extremely' useful
- **Provincial program description for Support Services**
 - 45% (29/65) had used the program description
 - 88% (22/25) rated videos as 'very' or 'extremely' useful



EBPU OCASE
E-Training System



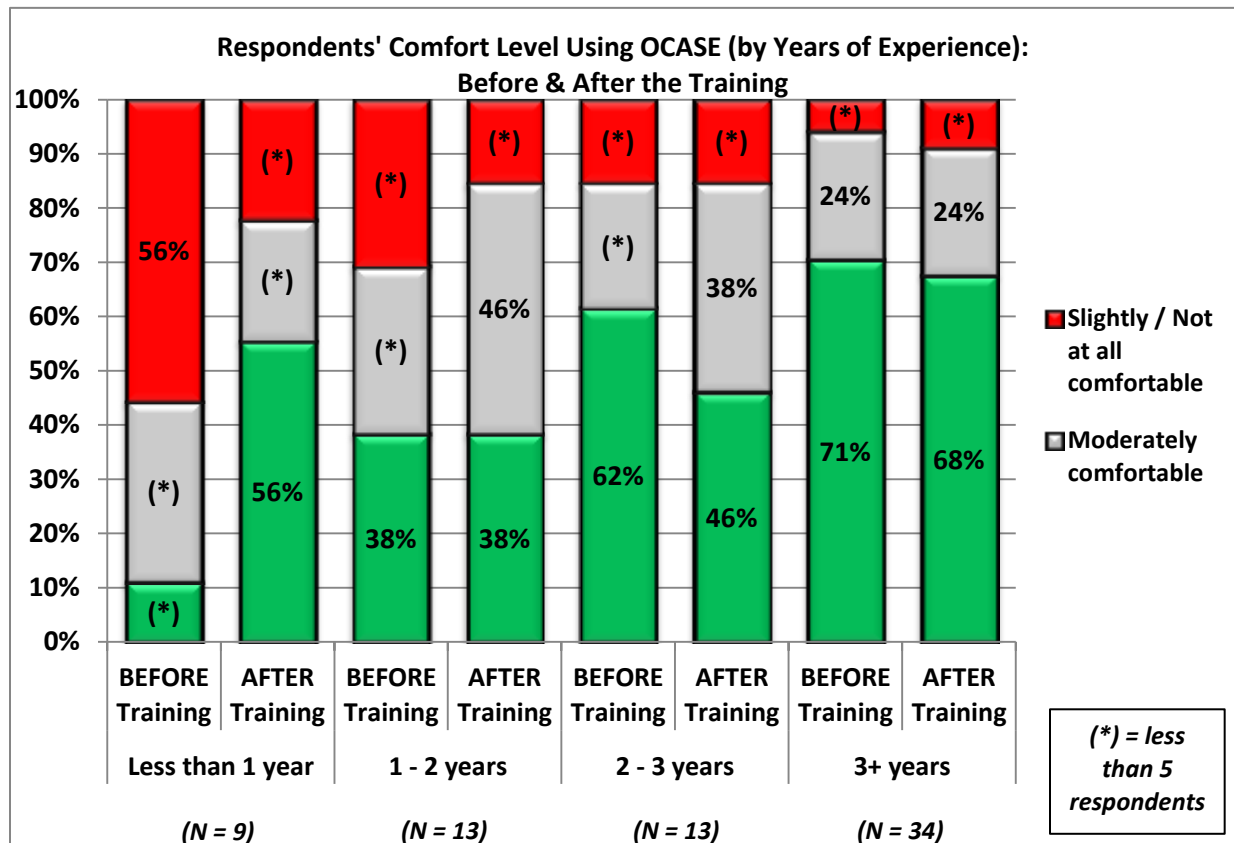
EBPU Training
Modules

EXPERIENCE WITH THE OCASE SYSTEM

RESPONDENTS' COMFORT LEVEL USING OCASE

Fifty percent (50%) of respondents rate their comfort level using OCASE before and after training as 'very' or 'extremely' comfortable

Two-thirds of respondents (68%, 48/70) had used the OCASE system for more than two years. When asked to reflect on their comfort level using OCASE before and after the training, slightly more than fifty percent of respondents (55% (before) and 57% (after)) rated their comfort level as 'very' or 'extremely' comfortable both before and after the training. Overall, the training session did not seem to affect respondents' comfort level using OCASE.



OCASE training improves comfort level for respondents who had used OCASE for less than one year

However, a different picture emerges for respondents who had used the OCASE system for less than one year. For these nine respondents, there was a marked improvement in their self-reported comfort level using OCASE:

Before the Training:

- 55% 'slightly' or 'not at all' comfortable
- 11% 'very' or 'extremely' comfortable

After the Training:

- 22% 'slightly' or 'not at all' comfortable
- 56% 'very' or 'extremely' comfortable

AGENCY SUPPORT WITH OCASE

Approximately three-quarters of respondents identify they are well supported by their agency in using OCASE

Pre-Training: Knowledge of Changes in OCASE

When asked to reflect on the amount of information received from their agency about the upcoming changes in OCASE (that reflect the revised reporting requirements for support services), 75% of respondents (51/68) stated their agency had provided *'about right' or 'more than enough' information* to them.

Post-Training: Agency Support with OCASE

Furthermore, when thinking about *'after the training'*, eighty percent of respondents (54/67) reported that their agency is providing *'about right' or 'more than enough' information* to help them understand how their activities should be recorded in OCASE.

Designated In-Agency OCASE Support Person

In addition, the majority of respondents (88%, 58/66) knew the name of their designated in-agency OCASE support person. Fifty-three percent of these respondents had received support from this person, while thirty-five percent had not needed any additional help from this person at the time of completing the survey.

RESPONDENTS' REFLECTIONS

MOST USEFUL ASPECTS OF THE TRAINING

Overall, forty-five (45) respondents identified aspects of the training they found most useful for their learning. In general, these items focused on the blended-learning approach used for the training session, which incorporated multiple learning styles.

In particular, respondents' comments about the most useful aspects of training clustered around the following key components of the training:

Live training on how to use the support documents

Seventeen respondents appreciated the trainers going through each document and showing the attendees how to enter data into the system. They liked the trainers showing how to navigate the system and the support documents. Specifically, they commented on the demonstrations of how to use the service record, creating a new client, searching for a client, the note-taking tools and the tips/tricks for using the documents more efficiently as being most useful.

Personalized and practical nature of the training session

Seventeen respondents highlighted the importance of the personalized support offered and the practical nature of the training session. More specifically, they pointed to the one-on-one additional support they received, the chance to ask questions and receive immediate answers, and the opportunity to discuss how staff members at their agency are entering data into the system. For those agencies that participated in a joint training with another agency, they liked the shared learning opportunities with colleagues. Lastly, five respondents commented that the follow-up materials emailed by EBPU after the training were important for their learning process.

Time included for participants to practice entering data into the various support documents

While inherent within the themes listed above, the time provided for participants to practice entering data in the support service documents was a very useful part of the training. Five respondents valued the opportunity to put the training into action immediately during the session. They were able to 'see' how to enter the data in each document and to 'do' by practicing what they were shown.

OCASE Support Services Training Evaluation – Summary Report for the Community (July 2015) ...

MOST USEFUL ASPECTS OF THE TRAINING

[participants' quotes]

"I appreciated going through the various issues line by line to make sure that we are using the right tools and there is consistency and uniformity amongst workers of how and what we are reporting."

"The hands-on approach. The trainers were excellent to work with and very patient."

"Being able to access onsite support when trying to learn new information."

"Hands on practice ..."

SUGGESTED ITEMS TO INCLUDE IN FUTURE TRAININGS

Twenty-five respondents suggested multiple items that should be included in future training sessions. These proposed changes clustered around two key areas: Specific Training Ideas and Agency Practices (OCASE).

Specific Training Ideas

For future training, respondents suggested that the following items be included to enhance the learning process for participants:

- Include **more time for hands-on practice by the participants**
Focus on: (x5)
 - Navigating the support documents
 - Entering clients and their data
 - Updating client demographics
 - Updating existing client files
 - Entering anonymous and brief services
 - Printing reports (when available)
 - Using role plays to mimic doing or updating a client intake and then entering this data
- Provide **follow-up training that is agency-specific** (x2)
 - Respondents wanted training that reflected their activities and how to enter them into OCASE
 - They requested follow-up training with their agency to ensure workers are recording activities correctly
 - This suggests that some agencies **did not commit sufficient resources** to prepare their staff members for training and **did not link their agency activities** to the support **service categories**
- Ensure the highest possible **computer to participants ratio**
 - In sessions where not all participants had their own laptop, two respondents identified the need for a 1 computer per 2 participants (x2)

ITEMS TO IMPROVE FUTURE TRAININGS

Specific Training Ideas

[participants' quotes]

“We needed more time to practice with supervision. ... I'd have liked to practice with fictitious clients more.”

“Trainings may be more useful if they are organization specific, as we may have a different way of tracking than ... presented...”

“ I think it would be an interesting exercise to incorporate what that intake/re-intake interaction between service provider and service user could look like, i.e. navigating the platform while conscious of triggering content, how to provide some support when such triggers present themselves.”

Agency Practices (OCASE)

Respondents highlighted the need for agency processes to support successful documentation of agency activities and service outcomes

Three respondents identified the need for agencies to develop internal practices that would help staff use the OCASE documents. While these items do not relate directly to the structure of the training, they are internal practices/procedures, that affect staff members' ability to implement what they learned at the training successfully.

Furthermore, these comments point to the need for agencies to complete the tasks that the EBPU identified as prerequisites to training. **These suggested best practices will optimize the agency's knowledge of the breadth, intensity and impact of their work.**

In particular, the following themes summarize respondents' suggestions:

- Develop an **agency culture and specific procedures** for staff to **enter data on a regular basis**
 - As opposed to just before the semi-annual reports are due to the funders
- Develop an **agency process** that clarifies **when staff members should update their clients' demographics, presenting issues, and close a file (inactive)**
 - This process is essential to support efficient staff workflow and effective use of the documents
 - This will increase the quality of the data about their clients and promote better service delivery that meets clients new and emerging needs
- Identify **how all activities need to be recorded in OCASE**
 - Agencies need to clarify to staff members how all activities should be recorded in the OCASE system
 - E.g., when staff deliver xxx activity it is recorded as xxx service category
 - The 'mapping' of services should be consistent across all staff members and a living document for ongoing reference

ITEMS TO IMPROVE FUTURE TRAININGS

Agency OCASE Practices

[participants' quotes]

"... constant reminders to enter data not only to prepare the OCHART report."

"This is the part we should do within our agency, as we document data in a specific way. So we need to develop our own training to make the process more smooth."

"We need a follow up training that looks at everyday activities that we do and the entries required. As long as we are all winging it - the data obtained isn't going to be very useful."

ADDITIONAL FEEDBACK RECEIVED

Thirty-eight respondents provided specific feedback and comments about the various OCASE documents that would help workers improve how they record their support service activities. The OCASE team (EBPU) has developed a series of FAQ documents that respond to these questions and concerns.

In addition to providing reflections on the training, the OCASE documents and future trainings, respondents commented on the provincial Support Service Program Description and the OCASE system. In particular, questions related to how to record specific support activities in OCASE were answered in the FAQ document. Questions related to education and outreach activities that are recorded in the EOCD documents are addressed in the EOCD online support materials and will be featured in an upcoming FAQ specific to EOCD documents (in the fall).

Furthermore, two respondents commented that the previous version of OCASE for recording information about support services was easier and had better features. Three respondents stated the need for less complicated data collection and reporting requirements and one respondent reported a strong dislike for the demographic reporting requirements. Lastly, one respondent highlighted the need for regional **leadership on the support services program** to provide consistent direction, create stronger alignment of data entry practices across the province and standardize professional development for all support workers.

Satisfaction with the new OCASE Documents for Recording Support Service Activities

In addition to the comments received from respondents that indicated concerns with OCASE system and provincial support program, thirteen respondents to the survey (13/75, 17%) **specifically expressed their satisfaction with the ease of entering data using the new OCASE documents, the OCASE 2.0 system and the support received from the OCASE team.**

Note: These comments are in addition to the forty-five (45) responses that highlighted the part of the training that participants found most useful.

The following quotes are a sample of these comments.

“It is good that we can call OHTN staff when there is a problem with OCASE.”

“We are very grateful to the OCASE team at the OHTN for providing us with speedy, friendly support whenever we have questions or are having problems working through the system.”

“The system allows me to capture relevant information easily.”

“The training and guide were helpful and prepared me for newer changes I hadn't been using yet.”

RECOMMENDATIONS

After a thorough review of all comments received from the survey respondents and verbal feedback received from OCASE users since the roll-out of the new Support Services Documents, the OCASE team (EBPU) recommends the following:

Immediate Response

- 1) The EBPU/OCASE team will provide a FAQ document that addresses the most common questions raised in the evaluation.
- 2) The EBPU/OCASE team will continue to provide follow-up support as required for:
 - a. assistance with mapping agency activities to the new program categories
 - b. developing internal (agency) best practices for data entry and updates
 - c. other issues as needed
- 3) In addition, the OCASE leads at agencies should continue to be responsible for ensuring that internal training (by experienced agency or regional staff) occurs with their new staff members. **This is the only way to ensure that new workers learn their agency-specific practices.**
For example,
 - a. agencies can have new workers shadow experienced OCASE users
 - b. agencies can provide new workers with the agency-specific guides for using OCASE pertaining to their role (e.g., definition documents, manuals, videos, map of agency activities to OCASE service categories, etc.)
 - c. agencies can refer to the online OCASE resources <http://www.ohln.on.ca/evidence-based-practice-unit/>

Ongoing Response

In future, when new HIV service reporting requirements are introduced, the following should be in place for agencies to meet their accountability to the AIDS Bureau:

- 4) OCASE leads at agencies will need to work more closely with the EBPU to map their activities with the new service reporting requirements.
In order for this process to work well, each agency representative needs to:
 - a. Schedule a meeting time with the EBPU prior to the training
 - b. Complete the mapping of agency activities prior to the training
 - c. Relay this information to their coworkers