OCASE TREAT User Guide



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OCASE User Guide

This is a step-by-step guide of the new OCASE System called TREAT. The current system (PENELOPE) did not allow for customization that agencies wanted, and is updated in terms of security features. Use this guide as a reference, and a workbook to keep notes about your OCASE Account.

OCASE Workflow

This is a sample workflow, and can be adapted to your own agency. See Appendix for a fillable workflow chart.



User ID Set up

You will have an assigned User ID and Password from your agency.

Login

- 1) The Organization ID is ocase
- 2) Use your assigned User ID and Password to login

	ocase
8	User ID
۵	Password
Forgo	t password? Log On

TREAT Version 5.17.0

Password

You will receive a temporary password, and will need to update your password for security purposes. In this case you will see a prompt to change your password.

1. You can also change your Password from the top Navigation Panel, select the **User Options** drop-down menu, then select **Preferences**

Keep track of your temporary password to complete the process successfully

🍞 OCASE d Scheduling 🔹 🛢 Data Manager 🍷 💾 Reports 🍷 🖿	st Name/TREAT # 🗸 🧟 🌶 📜 🛛 🗸
	PreferencesHelp
. The Change Password option will appear on the	Account Management
screen 8. Select Save	User Information First Name: trainer9 Last Name: ocase Primary Position: Change Password
	All required fields are marked with an asterisk Change Password
If you are locked out of your account, contact your administrator or designate.	Repeat Password *
	Confirm Password Enter your old password to submit changes *

Safety and Security

There are new safety and security features with the OCASE system update:

- Passwords require updating every 3 months.
- You will be automatically logged out of the new system after 30 minutes of inactivity. You will receive a pop-up notification after 25 minutes.
- If you fail authentication 3 consecutive times (i.e. unsuccessful login attempts), your account will be put on hold. Contact your system administrator or designate.
- When you are locked out of your OCASE account, you will need to contact your designate or OHTN for support to unlock your account.

The security features of OCASE are still reliant on manual security

Tips for best practice:

- Lock your screen every time you leave your computer
- Your password should be unique from other passwords
- Do not write your password down, consider using an online password safe such as *1Password* or *Safe in Cloud*

Notifications

There are 3 notification tabs in the top right corner of the system. Each of these tabs, represent different types of notifications.



- 1. **Pencil:** Notifications Displays notifications, such as items requiring your signature or cosignature.
- 2. **Bell:** Alerts Displays alerts such as new participant assignment.
- 3. List: Tasks Displays tasks listing items you need to do, such as an OCAN assessment due. *This feature will be enabled in the future.

Register a Participant

In this section, you will:

• Search for a participant, add the participant (if they are not registered in the system), edit and update existing participant information

Additional Resources:

- Review OCASE training video *How to Register Participant* for more information.
- Review OCASE training video *How to Search for a Participant* for more information.
- Review the OCASE Training video *Participant Profile* for more information.

This is Step 1 in the OCASE workflow:



Steps to register a participant

When you search a participant name, and the participant is not is the system, you will have the option to "**add**" them to the system using the **Register Participant** button.

Participant Search					
0 Search Results for Last Name/TREAT # "ontario" With Sou	ndex				
T Refine Search Results No Participants found	Register Participant				

1. The **Demographics** screen will appear, where the participant information can be added.

Demographics			
Please complete the following demogra	phic fields to create the new client:		
First Name*	Middle Name	Last Name *	Mandatory Questions *
			First Name is a mandatory question.
Consent to track data in OCASE Select One	Preferred Name or Alias		Last Name is a mandatory question.
TREAT ID	OCASE ID	Туре	Sex/Gender is a mandatory question.
		Select One 🗸	Edit Checks 🞜
Sex/Gender *	If Sex/Gender not listed, please complete		
Sectore			Cancel Save

Participant File

Upon program registration an individual exists in the system but it does not mean they are a service user yet.

Steps to enroll a participant to the OCASE System

1. Search by last name to ensure no duplicates are created

2. If there is no participant with the last name being searched, select the green button **Register Participant**



Demographics combines the previous OCASE system's *Individual Profile and Demographic tab and some of the Intake Document* into one screen.

Find an Existing Participant

Before registering a participant to the OCASE System, always check to see if they have already been added:

Steps to search for a participant

1. Select the participants search tab

🕜 OCASE 🗎 Scheduling - 🛢 Data Manager - 🕍 Reports - 🛛 Last Name/TREAT # - 🔍 🖋 🗘 🗮 🐵 -

2. Enter the **last name** of the participant.

Check with your supervisor to learn what your agency practice is when a participant does not provide their last name. Enter your agency's process:

- 3. If you cannot find the participant on the first search, perform an Advanced Search.
 - If you cannot find a participant it could also mean they • are not registered in the system

Advanced Search includes: Last name, first name, phone, or previous OCASE ID and Date of Birth. The simplest way to search for a participant is by searching their last name in the search bar.

Ensure that you have opened the participant file, by checking for their name in the yellow box at the top of your screen.

	E 🛑 Scheduling 👻 🛢 Data Manager 🍷 🐸 Reports 👻	Last Name/TREAT #	+ Q	∥ ↓ 🗄 ® -
> 2SPIRIT	Ralph Snow, 10011 🔽 -SS (trainer8 ocase)			Ŧ

Edit Participant Information

- 1. Search the participant in the system, and ensure the participant file is in context.
- 2. Select Demographics on the left panel of the screen. Click the (+) to see more details - using this plus sign gives you a shortcut to the demographics and other profile information.

Enroll in a program Create a new encounter ۲ Create a Progress Note Create an Appointment

٢

Demographics

Participant Access Participant Relationships Participant Schedule Encounters Referrals Waitlist Workload Care Team Assignment Profile Progress Notes IPCC Assessments External Documents Tasks Alerts Lockboxes Data Export

3. At the top of the Demographics screen, the option to Edit is on the right side

Demographics External Document (Last import 10-May-2022) 1



Referrals (Incoming)

This is used for incoming referrals only. Incoming Referrals could be document written, verbal and cross-program internal referrals.

Steps to add referrals (incoming)	Enroll in a program Create a new encounter
1. With the participant is in context select Referrals from the left	Create a Progress Note
Navigation Pane.	•
	Demographics
	Participant Access
	Participant Relationships
	Participant Schedule
	Encounters
	Referrals
	Waitlist
	Workload
	Care Team Assignment
	Profile
	Progress Notes
	IPCC
	Assessments
	External Documents
	Tasks
On the Referral page, select Add Referral, fill in the mandatory (and	Alerts
useful) fields	Lockboxes
	Data Export



No Referrals to display.

- 3. Ensure that you include **Referred by** (open text), and **Referral Source** and **Decision Date**.
- 4. Participants can be referred to several programs (up to 6 on a single referral (incoming) entry, and they can have a status and waitlisted. Select Save.

Decision Date is a useful feature to understand program demand within your agency, and documenting it assists in bridging gaps to services with your clients.

Decision Date tracks the number of days that a participant is waiting for a service.

Enrollment

Enrollment is service initiation for a participant, and is tracked as a type of **Encounter** with a Status of "Admitted". In this section, you will:

• Input incoming referrals, and enroll a participant in a program.

Additional Resources:

• Review the OCASE Training video Enroll a participant in a program

Referrals (Incoming) or **Waitlist** may not be needed for some existing participants. For example, if a participant is being transferred to a new housing unit in a housing program, they could be put on a Waitlist instead of being registered as a new Referral (Incoming).

This is Step 2 in the OCASE workflow



Enroll a Participant in a Program

Steps to enroll a participant in a program

- 1. While in the participant file, select Enroll in Program from the **Navigation Panel**
- 2. Enter the:
 - Start date
 - Visit type default to enrollment •
 - Program select from drop down. •

Active programs display which programs the participant is enrolled in. A participant can be active in multiple programs.

- 3. Select the Program Name
- 4. Enter the Primary Worker (your name) or select from another list of names
- 5. Once the information has been entered, select Save

Program Enrollment Information

	Mandatory Questions		
Client Harry Potter	TREAT # 10002	Encounter #	Start Date is a mandatory question. Program is a mandatory question. Primary Worker is a mandatory question.
Start Date [*]	Visit Type* Enrollment		Edit Checks 🞜
Program * Select One	Site Select One	Primary Worker *	Cancel Save

If you experience an error message during Enrollment in a program, check to see that the participant is not enrolled already. Participants can be enrolled only once into each program offered by your agency.

Enroll in a program

Participant Relationships Participant Schedule

Care Team Assignment

Demographics Participant Access

Encounters

Referrals

Waitlist Workload

Profile

IPCC

Tasks Alerts

Lockboxes

Data Export

Progress Notes

Assessments External Documents

Create a new encounte Create a Progress Note Create an Appointment

۲ ۲

Discharge a Participant from a Program

If a participant is exiting a program you will discharge them from the program. The participant can be added back to the program if they re-enroll.

Steps to discharge a participant from a program

- 1. While in the participant file, then select **Encounters** from the Navigation Panel
- 2. Under **Encounters**, you will see the list of all programs a participant has been in and been discharged from.

Encounters are interactions with a participant file. Depending on the program type would have different encounters.

3. Select **Edit** for the Enrolled program they were previously Admitted to. This is where you want to discharge the participant from. Update Status, end date and reason

Encounters

ŧ	Program 🖨	Encounter # 🗢	Start Date 🖨	End Date 🖨	Status 🖨	Visit Type 🗢	Enc Type 🗢	Close Reason 🖨	
Ð	2SPIRITS-SP	000000155	15-Jun-2022	15-Jun- 2022	Scheduled	Visit	Video Conference		🗭 Edit
Ŧ	2SPIRITS-SP	000000147	08-Jun-2022	08-Jun- 2022	Scheduled	Visit	Video Conference		🕼 Edit
ŧ	2SPIRITS-SP	000000046	01-Jun-2022	01-Jun- 2022	Cancelled	Visit	Video Conference		🕜 Edit
÷	2SPIRITS-SS	000000175	01-Jun-2022		Admitted	Enrollment			🕼 Edit
Ð	2SPIRITS-SP	000000045	25-May- 2022	25-May- 2022	Scheduled	Visit	Video Conference		🕜 Edit
Ð	ACAS-SE	000000007	09-May- 2022	09-May- 2022	Discharged	Enrollment		Family/Client Moved	🕼 Edit
Ŧ	ACAS- ALPHA	000000021	09-May- 2022		Admitted	Enrollment			🕼 Edit

Demographics

It is ideal to collect demographic information upon intake; however, this information can be filled in later, or updated at any time.

Steps to add demographics

1. While in the participant file, select Profile from the left navigation panel

2. Select a **tab** (i.e. medical, housing etc.), to update the participant file. Each tab contains groupings of information related to the tab heading. There are a variety of fields to complete.

This section replaces the intake form in PENELOPE OCASE.

Enroll in a program Create a new encounter

Create a Progress Note

Create an Appointment

are Team Assignment

Profile Progress Notes IPCC Assessments External Documents

Tasks Alerts Lockboxes Data Export

Demographics Participant Access Participant Relationships Participant Schedule Encounters Referrals Waitlist Workload ٢

۲

🕀 John Doe, 10017 💈						Ŧ
Profile						Profile External Document
Select Action 👻						Show All Archives
Referrals (Outgoing)	Client Profile	Medical	Housing	Employment	Legal	Safety Concerns to Others
Referrals (Outgoing	g)					+ Add New
No outgoing referrals	entered					

Serving a Participant

Serving a participant includes various steps. Some of the steps are not applicable in every interaction with a participant. In this section you will

• Update the participant file, including the documentation of issues and the addition of participant relationships, writing progress session notes, inputting any outgoing referrals based on the issues/needs presented, add attaching external documents such as signed PDFs, etc.

This is Step 3 in the OCASE workflow.



Document Issues

Issues are documented through categories. You can search for an issue by typing the theme in the Issue search bar. See Issue Categories in the Appendix for the full list. Enroll in a program

1. While in the participant file, select **IPCC** from the left Navigation Panel



Create a new encounter

O

Ø

3. Begin typing the **Issue/Need Title**, this is an incremental search, as you type in an issue, a drop-down menu will appear. Include any details in the open text box.



4. Select a Domain

🗆 Domain *		
 Current Safety Concerns (SAFE) 	\bigcirc Living with HIV (HIV)	O Housing (HOUS)
 Food security (FOOD) 	 Well-being (WELL) 	 Income and benefits (INC)
 Education/Employment (EDU) 	 Social/Personal Concerns (SOC) 	 Legal issues (LEG)
O Immigration (IMM)		
· · · · · · · · · · · · · · · · · · ·		

5. Select an Encounter that the issue is associated with

I EI	ncounter *							
Sel	ect Program	Encounter #	Start Date	End Date	Status	Visit Type	Enc Type	Close Reason
C) 2SPIRITS	-SS 000000018	09-May- 2022		Admitted	Enrollment		
	Open encounters (1 to 1 of 1) found Show discharged/other encounters							

6. Select Save.

Referrals (Outgoing)

Referrals (Outgoing) indicates referrals to external agencies, programs or other organizations that you are providing to a participant. See Appendix *Types of Referrals (Outgoing)* for a full list.

Steps to document referrals (outgoing)

Enroll in a program 1. While in the participant file, select **Profile** from the left Navigation Panel Create a new encounter Create a Progress Note O Create an Appointment Ø Demographics **Participant Access Participant Relationships** Participant Schedule Encounters Referrals Waitlist Workload Care Team Assignment Profile Progress Notes IPCC Assessments **External Documents** 2. Select the Referrals (Outgoing) tab then select Add New Tasks Alerts Lockboxes Data Export

표 Jane Doe, 10031 Z	I.					Ŧ	
Profile						Profile External Document 0	
Select Action 👻						Show All Archives	
Referrals (Outgoing)	Client Profile	Medical	Housing	Employment	Legal	Safety Concerns to Others	
Referrals (Outgoing) + Add New							
No outgoing referrals e	entered						

- 3. Input the current Issue (i.e. Housing). See Appendix, Types of Referrals (Outgoing) for the full list
- 4. Input Issue Detail (begin typing 'HOU...', possible issues related to housing will pop up)
- Input the Referral Agency Name that you will refer to. The Referral Agency Address and Contact Name/Details are optional Select a Status
 Recommendation: Input the Follow-up
- 6. Input the referral **Date**
- 7. Select Referral Agency Type

Recommendation: Input the Follow-up Date. Each time you edit the referral, you can change the follow-up date and click save again.

	All required fields	are marked with an asteris	к* 	
Current Issue Category*	Issue Detail [*]	Referral Agency Na	ame Status [*] Select One	
Follow-up Date				
Date [*]	Referral Agency Type*	Referral Agency Ac	ddress Referral Agency Contac Name/Details	t
Consent Provided *	Notes			
	c	ancel Save		

External Documents Feature

9. Once saved, the Referral outgoing will appear in a list. You will have the option to **Edit** and **Save** multiple times or **Archive** the Referral (Outgoing) and update 'Status', 'Follow-up Date' and 'Notes' details as the referral progresses or changes.

Referrals (Outgoing)								
ŧ	Current Issue Category	Issue Detail	Referral Agency Name	Status	Follow-up Date	Last Modified Date	Last Modified User	
ŧ	Living with HIV	HIV - Access to medications	Sunnybrook Health Sciences- Anita Rachlis Outpatient Clinic	lssue identified	22-Jul-2022	15-Jul- 2022	trainer9 ocase	2 Edit 3 History

Edit Referrals (Outgoing) Entry							
Issue Detail [*] HOUS - Difficulties pa× •	Referral Agency Name Fred Victor	Status [*]					
Referral Agency Type*	Referral Agency Address	Referral Agency Contact Name/Details					
Notes							
	Issue Detail* HOUS - Difficulties pa × • Referral Agency Type* COMM-Housing provi × • Notes	Issue Detail* Referral Agency Name HOUS - Difficulties pa× Fred Victor Referral Agency Type* Referral Agency Address COMM-Housing provi× • Notes					

10. To view Archived Referrals, select Show All Archives. To view details of archived referrals, click +/-

Profile						Profile External Document 0		
Select Action 🔻						Show All Archives		
Referrals (Outgoing)	Client Profile	Medical	Housing	Employment	Legal	Safety Concerns to Others		
Referrals (Outgoing) + Add New								
No outgoing referrals e	entered							

🕀 🔒 2SPIR	Xander Ca	a ge, 10008 er12 ocase), AC/	AS-SUP (traine	er4 ocase)				*
Pr	ofile						Profi	le External Document ()
Selec	ct Action 👻							Hide All Archives
Ref	ferrals (Outgo	oing) Client	Profile Me	dical H	ousing Em	ployment	Legal	
Saf	ety Concerns	to Others						
Refe	errals (Out	going)						+ Add New
Đ	Current Issue Category	Issue Detail	Referral Agency Name	Status	Follow-up Date	Last Modified Date	Last Modified User	
Ξ	Food security	FOOD - Difficulty accessing food stores	Food Bank - Brampton	lssue identified	28-Jul-2022	14-Jul- 2022	trainer4 ocase	📓 Edit 🤊 History
	Date 14-Jul-202	22	Referral Age COMM-Con food bank	ency Type nmunity	Referral A Address	gency	Referra Contac	al Agency :t Name/Details
	Consent Pr Verbal (tel	rovided e)	Notes Has been sig some time.	ck for				

Documents

The external documents section is a useful tool to keep participant information in one place. Attach participant documents and replace them with updated documents as needed (i.e. copy of health card or license, consent forms, notes from other service providers etc.)

External Documents

Steps to attach external documents

1. While in the participant file, select **External Documents** in the Navigation Pane

Enroll in a program Create a new encounter Create a Progress Note Create an Appointment

Demographics Participant Access Participant Relationships Participant Schedule Encounters Referrals Waitlist Workload Care Team Assignment Profile Progress Notes IPCC External Documents Tasks Alerts Lockboxes Data Export

2. Select Add External Document



No External Documents to display.

3. Select the document from your computer, and fill in the mandatory fields, then select Save

All required fields are marked with an asterisk *							
Current Document * [No file selected Select Document]							
Document Date *		Description					
Document Type *		Document Sub Type *					
Select One	~	Please select Document Type first					
	Cancel	Save					

View and Filter Documents

There is an option view and filter existing external documents for your review.

Steps to view and filter documents

- 1. Select **External Documents** from the left Navigation Pane:
- 2. Select Filters, then use the drop-down box to select an option
- 3. Select Apply Filters

External Documents + Add External Document **T** Filters External Document Type External Document Sub Type All × Bed Bug Protocol ~ × × Consent form All Assessments × Health Card/Driver's License Demographics × OCAN Consent form IPCC (Care Plan) × Referral Document × RTA Profile Progress Note Clear Filters Apply Filters

Edit External Documents

There is an option edit and update existing external documents.

Steps to edit external documents

1. Select the document, then select the Edit button

Ext	External Documents + Add External Document									
Select	Action 🔹 🝸 Filters									
	Document Date 🗸	Type 🗢	Sub Type 🖨	Description 🖨	Imported Date \$	Imported By 🖨				
	10-May-2022	Demographics	Health Card/Driver's License	Drivers License	10-May-2022	trainer9 ocase	🕼 Edit			
Select	Select Action									

2. Once you have selected **Edit**, you will have the option to upload a new document or edit the information associated with an existing document. To upload an updated document, click **Select Document**. When you are finished editing, select **Save**

Edit External	Document
---------------	----------

All required fields are marked with an asterisk st								
Current Document * Test123.pdf - File Size: 35K Select Document								
Document Date *		Description						
29-Jun-2022	i i i i i i i i i i i i i i i i i i i	Test123						
Document Type *		Document Sub Type *						
Demographics	~	Health Card/Driver's License	~					
	Cancel	Save						

Participant List

A participant list is a way to keep program lists organized within the OCASE System. For example, you can create a list for your weekly Youth Program, which includes the participants who are enrolled in that specific program. Once you have created this list, you can add bulk/group notes to keep track of program information.

Steps to create a participant list

- 1. Navigate to the OCASE home screen
- 2. Select Create Participant List and fill in the name of the list (i.e. Youth Cooking Class)

OCASE	🗧 🔁 Data Manager 🔻	I Reports ▼	
My Participant Lists			:
Trainer 9 Participant List	(0 Participants)		~
+ Create Participant List			
Add Participant to List:			
Last name/TREAT #			Q
Name	TREAT #	DOB	

3. Select Participant List Type (Custom or Program Based), Program, and Participant List Name (this is fillable)

Participant list type:		
Program based		
* Program:		
2SPIRITS-VC		
* Participant list name:		
2SPIRITS-VC		

- 4. Select the participants who take part in the program.
- 5. Select Create Participant List

Create New Participant	List			×
Name	TREAT #	DOB	Admit Date	
🗆 🔥 Cage, Xander	10008	09-May-1968	10-May-2022	
🗆 👩 Edge, Ford	10012	01-May-1900	09-May-2022	

• Previous	Cancel	Create Participant list

6. To remove a participant from the list, select their name in the list, then select **Remove from Custom Participant List** from the left navigation panel:



Participant Relationships

Participant relationships refers to participants who have a child, spouse/partner or other relationship enrolled at your agency.

Steps	to add participant relationships	Enroll in a program
1.	While in the participant file, select Participant Relationships	Enroll in a program Create a new encounter Create a Progress Note Create an Appointment Demographics Participant Access Participant Relationships Participant Schedule Encounters Referrals Waitlist Workload Care Team Assignment Profile Progress Notes IPCC Assessments
2.	Once on the Participant Relationship page, select the blue button (right side) that says Add Participant Relationship	External Documents Tasks Alerts Lockboxes Data Export
	🗄 Jane Doe, 10031 🔼	*
	Participant Relationship	+ Add Participant Relationship

3. Search for the participant you wish to add in the search bar, by their last name

🗄 Jane Doe, 10031 🔁	Ŧ
Add Participant Relationship	
Participant Search	
Last Name/TREAT #	
Cancel	

4. If the participant does not exist in the system, you will need to **register the participant** (see *Enrollment* to complete this step).



A separate enrollment may be necessary. For example: An agency has a women's program, and a baby formula program. If a mother is registered as a participant in the women's program for support services individually, the baby will need to be enrolled in the baby formula program individually. The baby will need to be registered in OCASE, in order to be registered in the baby

5. Once the Participant File has been created, you select the participant relationship from the drop-down menu and input any comments.



Navigate Between Related Participants

Once the participants have been linked in the system, you can navigate between the participant files.

Cancel

Save

- 1. With *Participant A* in context, select **Participant Relationships** in the navigation panel.
- 2. There will be a list of participant relationships, select the participant you wish to view.



Schedule

OCASE has a calendar options to keep your appointments organized and tracked in the system. Additionally, from the scheduler, you can add notes to appointments.

Additional Resources:

- Review the OCASE Training video Schedule-Add Appointments
- Review the OCASE Training video <u>Add Individual Note</u>
- Review the OCASE Training video <u>Add an Activity</u>

This is Step 4 in the OCASE workflow:



Scheduling

- 1. From the **Top Navigation Panel** select **Scheduling**
- 2. Use the drop-down menu to select schedule to view your schedule and view your calendar

🍞 OCASE	菌 Scheduling 👻 😂 Data Manager 👻 💾 Reports 👻
	Schedule
	Schedule List Manager
	Appointment Assignment

Individual Appointments

Create individual appointments within your calendar to record when you meet with a participant. These can be added before or after you interact with the participant (i.e. record a drop-in appointment, or a previously scheduled appointment).

Steps to create an appointment

- 1. Open your calendar, and click anywhere on your calendar to begin a new calendar event.
- 2. Select a Program from the drop-down menu

Add New Schedule E	ntry					
		All re	equired fields	are	marked with an asterisk *	
Appointment Type *					Program: *	
Participant Appointme	nt			~	Select One	
Status						
Scheduled				•	Select One	<u>^</u>
				_	ALHPA Group	
Start Date *		Start Time *			Expressive Art	
12-Jul-2022		03	: 00		Social Events	
All Day					Student Placement	
					Support	+

3. Select the **status** of the appointment

Add New Schedule Entry						
	All required fields are r	marked with an asterisk st				
Appointment Type *		Program: *				
Participant Appointment	~	Virtual Cooking Classes			•	
Status						
Scheduled						
Attended	A	End Date *	End Time*			
Cancelled		12-Jul-2022	04	:	00	
Scheduled						
No-show		Duration				
Re-Scheduled		00 : 01 : 00				

4. Add the participant using the **Add Participant** search bar, the **participant search bar** will allow you to search the participant by their **Last Name**

Appointment Type * Participant Appointme Status Scheduled Start Date* 06-Jun-2022 All Day	All requi	v v v v v	marked with an asterisk Program: * Select One End Date * 06-Jun-2022	*	End Time*	•
Appointment Type * Participant Appointme Status Scheduled Start Date* 06-Jun-2022 All Day	Start Time*	•	Program: * Select One End Date *		End Time*	T
Participant Appointme Status Scheduled Start Date* 06-Jun-2022 All Day	Start Time [*]	•	Select One End Date * 06-Jun-2022		End Time*	T
Status Scheduled Start Date* 06-Jun-2022	Start Time[*]	•	End Date *		End Time*	
Scheduled Start Date* 06-Jun-2022	Start Time*	•	End Date *		End Time*	
Start Date*	Start Time [*]	00	End Date *	-	End Time*	
06-Jun-2022	. 00 :	00	06-Jun-2022			
All Day					00 :	00
Recurring			Duration			
No		~	00 : 00 : 0	0		
Participant(s)*						
Name TREAT #	DOB PH	hone # 🕜		Add Parti	icipant	
				Last Na	ime / TREAT #	Q

5. Select **Save**, the appointment will appear in your calendar.



View Participant Appointments

Filter to view a particular participant within your calendar. This option will allow you to view all of the scheduled appointments with a participant.

Steps to view participant appointments in your calendar

- 1. Select the Participant search bar located at the top of your screen when viewing your calendar
- 2. Search for a participant by their last name to view appointment within your calendar



Individual Notes

There are two main types of Notes associated with a participant file, **Individual and Group Notes** (see Group Notes). Both individual and group notes link to an activity and date for tracking and quality data purposes.

Individual notes pertain to one specific participant at a time. You are also able to view all notes attached to the participant's file

Steps to add an individual note

- 1. Navigate to your **schedule**

2. Select the Activity in the calendar that requires a note



3. Select Edit



- 4. Scroll, then select **Save & Select Note Template** at the bottom of the Edit screen.
- 5. Select Individual Note from the list.

		Cancel Save - Sa	ive & Select Note Template	Group Note Individual Note Unregistered Note
6. 7.	Fill in the mandatory field Scroll to the bottom and so	s elect Sign Note	Once a you select Sign can only be edited for	Note, the note <u>48 hours</u>
	When you click the "Sign Note" butto	on you will be placing a note in the follow Participant: Doe, Jane, MRN 10031 der the following username and credentia OCASE User: trainer9 ocase, OCASE	ng Participant's permanent record: 5:	
	View Participant's	Chart 🗸 Spell Check 🚺 Delete	Note Sign Note	

Add an activity (individual)

- 1. Follow steps 1-6 above to add an Individual Note, then scroll to the bottom of the page to Activities
- 2. Select Add Activity



3. Select a **program** from the drop-down menu



- 4. Fill in the Activity and input the Units
- 5. Select Save

Activity *	Units *	
		+ Add Activity
comm		
FOOD-Community kitchen/meal program (FOOD100)	Save	
VOL-Education & community development (newsletter, kits) (VOL102)		
VOL-Serve on board/advisory committee (VOL109)		

Activities are used to track the previous *service/cart items* from the PENELOPE system. For example, if you provide a gift card to a participant in a program, this is where you will track it.

Group Appointment

Group appointments are used when you meet with multiple participants at the same time (i.e. group program or group drop-in).

Steps to create a group appointment

- 1. Select the appropriate **Participant List** (see Participant Lists to create a list for your program)
- **OCASE** 🖮 Scheduling 🔻 😑 Data Manager 👻 🔟 Reports 🔻 < 2. Select Create : My Participant Lists • Appointment to create Create a Progress Note Create an Appointment ♥ Trainer 9 Participant List (1 Participants) ~ a group appointment Remove from Custon Participant List within your schedule. + Create Participant List Add Participant to List: Last name/TREAT # DOB □ Name TREAT # 2 Doe, Jane 10031 31-Jul-1980 2SPIRITS-SS ~ 22-May-197_ Doe, John 10017 2 Malfoy, Draco 10030 15-May-198. ~ 10002 31-Jul-1980 🖾 🖴 Potter, Harry 2SPIRITS-SS, ACAS-ALPHA 18-May-20C 🚬 🔼 Snow, John Ralph 10011 2SPIRITS-SS
- 3. Once you have selected **Group Appointment**, the participants in your list will appear on the top of your Schedule screen.

trainer9 ocase's Schedule @

Participants	
Default Appt Type	Participant Appointment
Search Last Name	e / TREAT # Q
Jane Doe, 10031 💌	John Doe, 10017 💌
Draco Malfoy, 10030	0 💌 Harry Potter, 10002 💌
John Snow, 10011	•
Add to view	Clear Participants

4. **Deselect** those who did not attend by clicking the arrow with the participant name, then select **Remove Participant**



5. To create the **Group Appointment**, click anywhere on your calendar and fill in the mandatory fields.

id New Schedu	le Entry						
		All	required fields are r	marked with an asterisk st			
ppointment Type	•			Program: *			
Participant Appoir	ntment		*	Select One			•
tatus							
Scheduled			•				
tart Date *		Start Time*		End Date *		End Time*	
06-Jul-2022		00	: 00	06-Jul-2022		00	: 00
All Day							
curring				Duration			
No			~	00 : 00 : 00			
articipant(s)	•						
Name	TREAT #	DOB	Phone # 🔞		Add Parti	cipant	
Jane Doe	10031	31-Jul-1980	No Phone #	🖉 💼 Remove	Last Nar	me / TREAT #	C

6. Select **Save**, your group appointment will appear in your calendar.

Group (Bulk) Notes

Group notes are notes that pertain to a group of participants that are registered in a specific program, for example a group that participates in a cooking class.

Steps to create a group (bulk) note

To create a **Group Note**, you can use one of your predetermined **Participant List** (*See Participant List*).

- 1. Navigate to the OCASE home screen
- Select the Participant List that you will be creating a group note for (i.e. Youth Cooking Class, Women's group etc.) from the drop-down menu
- 3. Once you have the list of participants in a list, select a **Group Note.**

My Participant Lists
Trainer 9 Participant List (0 Participants) ~
Select List
Custom Lists
Trainer 9 Participant List (0 Participants)
Care Team Lists
Primary Worker - trainer9 ocase's Client List (0 Participants)
Program Lists
2SPIRITS-SP Client List (2 Participants)
2SPIRITS-SS Client List (12 Participants)
2SPIRITS-VC Client List (2 Participants)
ACAS-ALPHA Client List (5 Participants)
ACAS-EA Client List (8 Participants)
ACAS-SE Client List (0 Participants)
ACAS-SUP Client List (6 Participants)

🕎 OCASE 🛛 🛗 Schedul	ing 👻 🚍 Data Manager 👻 止	Reports 🔻	La
Create a Progress Note	Trainer 9 Participant List	(5 Participants)	~
Group Note Onregistered Note Create an Appointment Remove from Custom Destrictions blict	+ Create Participant List Add Participant to List: Last name/TREAT #		٩
Participant List	Name	TREAT #	DOB
	Doe, Jane 2SPIRITS-SS	10031	31-Jul-1980 🛛 🔼
	Doe, John	10017	22-May-197 _ 🛛 🔼
	Malfoy, Draco	10030	15-May-198 . 🛛 🔼
	Potter, Harry 2SPIRITS-SS, ACAS-ALPHA	10002	31-Jul-1980 🔼
	Snow, John Ralph 2SPIRITS-SS	10011	18-May-20C _ 🛛 🔽

4. Fill in the mandatory fields, then scroll to the bottom and select **Sign Note**

Once a you select **Sign Note**, the note can only be edited for <u>48 hours</u>

The **Group Note** option is for tracking program/project details, <u>not</u> for tracking individual participant details. <u>Do not include any identifying information</u> about individual participants in a Group Note. Add a group activity

- 1. Follow steps 1-3 above to add a Group (Bulk) Note, then scroll to the bottom of the page to Activities
- 2. Select Add Activity



- 3. Select the Program, add comments, select the Activity and input the Units
- 4. Select Save

Add New Activity		×
	All required fields are marked with an	asterisk *
Primary Worker * trainer9 ocase	Participant × Amy Pond × × Amy Pond × × Care Test × × Fluffy Dog × × Green Goblin × × Kelly Riff × × Peter Ramirez × × Roxy L Cruze ×	Program * ACAS-SE •
Comments ⑦ Each participant received	a care package with ingredients	×
Activity *	liday food bask × •	+ Add Activity
	Cancel Save	

Manage Appointments

Once you have met with a participant or a group of participants, you will be able to manage the information in the schedule.

Steps to manage existing appointments

1. Select the **View Schedule Entry** appointment within your calendar to view ピ Edit Appointment Type: Participant or edit Appointment 2. Select Edit to change Program: Support Services Status: Scheduled any information Start Date: 29-Jun-2022 09:00 End Date: 29-Jun-2022 10:00 3. Select Save Duration 00 : 01 : 00 Recurring: No Participant(s)* Name TREAT # DOB Phone # 😮 10017 22-May-1978 No Phone # 7 John Doe Primary Worker(s)* Name Email Address Phone # trainer9 ocase Appointment Site: Visit Type: Visit Encounter Type: Email/Text

Recurring Appointments

You can select recurring appointments for programs that occur on a scheduled basis.

Steps to add recurring appointments

- 1. Add the appointment to your schedule using the same steps for adding an appointment.
- 2. Select **Recurring Appointment** and fill in the mandatory fields.
- 3. Select Save

dd New Schedule Entry	/		
	All required fields are r	narked with an asterisk st	r
Appointment Type *		Program: *	
Participant Appointment	~	Select One	•
Status			
Scheduled	T		
Start Date [*]	Start Time *	End Date *	End Time*
06-Jun-2022	00 : 00	06-Jun-2022	₩ 00 : 00
All Day			
lecurring		Duration	
No	~	00 : 00 : 00	
Participant(s)*	DOB Phone # 😯		Add Participant

IPCC- Create a Care Plan

An **IPCC (Interdisciplinary Plan Client Care)** is a Care plan for each specific participant. IPCC documents a goal/issue/need for a participant, with visions, strengths and challenges for each goal. This is step 5 in the workflow, and used only when situations arise for participants that require a care plan (i.e. if a participant need emergency housing).



IPCC **Strengths, Challenges and Actions – Goals and Interventions** is a situational tool (with start and end dates) that can be used, but is not mandatory for every interaction with a participant.

Steps to create an IPCC

1. From the side Navigation Panel, select IPCC Enroll in a program Create a new encounter Create a Progress Note Ø Create an Appointment 0 Demographics Participant Access Participant Relationships Participant Schedule Encounters Referrals Waitlist Workload Care Team Assignment Profile Progress Notes IPCC Assessments **External Documents** Tasks Alerts Lockboxes Data Export 2. Fill in the mandatory fields* (Vision, Strength, Challenge) that pertain to one specific goal.

🗄 Jane Doe, 10031 🔼				Ŧ
IPCC			Add Entire IPCC to Lockbox 🔻	🔒 Print
	Issue(s) requirin	g your co-signature 0	IPCC (Care Plan) External Do	cument 🛛
Vision	Owner			Add Vision
No records to display.				
Strength (Domain)	+ Add Strength	Challenge (Doma	ain) + Ad	d Challenge
No records to display.		No records to d	isplay.	
Issue/Need Summary Select Action Filter No Issues to display.	,		+	Add Issue

Issue/Need

The issue/need section addresses circumstances that a participant is experiencing (e.g. housing challenges). These can be documented with a status as to how the circumstance is progressing.

Steps to add an issue/need

1. Select Add Issue

□ 🗄 Issues / Needs Title ♦ Domain ♦ Issue Status ♦ Last Last Modified ♦ Participant	Drimorry				
Modified Priority ≎ By ≎	Worker Priority \$	Active Goals \$	Complete Goals \$	Active Plan \$	
HOUS - Difficulties Housing In Progress trainer9 05-Jul-2022 High paying rent (HOUS) ocase 02:49:59 PM	High	0	0	1	🕼 Edit

2. Fill in the **mandatory fields*.** Scroll to connect an **Issue** to specific *Encounters*, and previously registered *Strengths* and *Challenges*. Select **Save**.

🗄 Jane Doe, 10031 🔽 2SPIRITS-SS (trainer9 ocase)		*
IPCC		
	All required fields are marked with an a	sterisk *
Issue/Need Summary Issue/Need Title *	Issue/Need [Details
🖻 Domain *		
O Current Safety Concerns (SAFE)	O Living with HIV (HIV)	O Housing (HOUS)
 Food security (FOOD) 	O Well-being (WELL)	 Income and benefits (INC)
O Education/Employment (EDU)	 Social/Personal Concerns (SOC) 	 Legal issues (LEG)
 Immigration (IMM) 		

Notifications

The top Navigation Panel will alert you to Notifications (tasks) through the Pencil Icon

OCASE	Reports 👻	Last Name/TREAT #	-	۹	ø	¢ ⊫	= @ ·
Module Notifications					×		
Progress Notes Notifications							
Notes requiring your co-signature: 0							
Notes requiring corrections: 0 Draft Notes: 0							
Group Notes to be completed: 0							
IPCC Notifications	Assessment	Notifications					
Issues requiring your co-signature: 0	Assessmen	ts requiring your signatu	re: 0				

Resources

TREAT User Manual

To access the TREAT User Manual

- 1. Select the User Options Menu at the top right corner of your screen
- 2. Select Help



U Log off

OCASE Support

Agency Support

Please fill in the following information:

Primary Contact:	
Name:	_ Email:
Secondary Contact:	
OHTN OCASE Support: ocase@ohtn.on.ca	

Online Resources

Privacy & Security Best Practices - Top 10 : OHTN Support (ohtn.freshdesk.com)

Information Security Fundamentals - Best Practices : OHTN Support (ohtn.freshdesk.com)

OCASE TREAT Training Videos - YouTube

OCASE Resources & Training – The Ontario HIV Treatment Network (ohtn.on.ca)

Appendix

I. Program Waitlists

Program Waitlists are used to track if a participant is registered to enroll in a program at your agency.

STEPS TO GENERATE A WAITLIST

1. While in the participant file, select **Referrals** from the Navigation Pane.

This for **Referrals (Incoming)** <u>only</u> and are covered in an earlier chapter as well.

Enroll in a program Create a new encounter Create a Progress Note Ø Create an Appointment Ø Demographics Participant Access **Participant Relationships** Participant Schedule Encounters Referrals Waitlist Workload **Care Team Assignment** Profile **Progress Notes** IPCC Assessments **External Documents** Tasks Alerts Lockboxes Data Export

- 2. Select Add Referral and fill in the mandatory fields*
- 3. Scroll to Referral 1
- 4. Select the Program the participant is being placed in and the status when initiated.
- 5. Leave **Waitlisted** and **Decisions Date** blank, when they are accepted to the program, they will be put on the waitlist.

Referral 1			
Programs		Site	
Select One	~	Select One	Ŷ
Reason			
	h		
Status		Waitlisted	
Select One	*	Select One	Ŷ
Decision Date			
			

The edit checks will guide you through the process. The decision date reflects the waitlist status, unless there is no waitlist, then the decision date reflects the status

STEPS TO VIEW A WAITLIST

1. Select Waitlist from the Navigation Pane Enroll in a program Create a new encounter 0 Create a Progress Note Create an Appointment O Demographics Participant Access Participant Relationships Participant Schedule Encounters Referrals Waitlist Workload Care Team Assignment Profile Progress Notes IPCC Assessments External Documents Tasks Alerts Lockboxes Ι. Select +/- to open Waitlist information. Data Export Waitlists



WL Days indicates how long a participant has been on a waitlist, which is a useful for tracking program need.

II. Issue Categories

Category	Search		
Education/Employment	EDU/EMP - Capacity building		
(EDU/EMP)	EDU/EMP – Community		
	EDU/EMP - Community building		
	EDU/EMP - Language barrier (ESL)		
	EDU/EMP - Need foreign credentials recognized		
	EDU/EMP - Need high school equivalency (GED)		
	EDU/EMP - Need to upgrade		
	EDU/EMP - Recent job loss		
	EDU/EMP - Skill development/training needed		
	EDU/EMP - Unemployment		
	EDU/EMP - Work related stress		
Food Security (FOOD)	FOOD - Difficulty accessing culturally appropriate food		
	FOOD - Difficulty accessing food stores		
	FOOD - Difficulty affording enough to eat		
	FOOD - Difficulty having access to healthy food choices		
	FOOD - Difficulty meeting dietary requirements		
	FOOD - Require food/life skills support		
Living with HIV (HIV)	HIV - Access to medications		
	HIV - Adherence to medication		
	HIV - Connection to HIV care		
	HIV - Disclosure		
	HIV - POZ prevention/baby formula		
	HIV - Stigma/Discrimination		
	HIV - Symptoms management		
Housing (HOUS)	HOUS - Accessible housing required		
	HOUS - Appropriate housing unit required		
	HOUS - Difficulties paying rent		
	HOUS - Homelessness		
	HOUS - Risk of homelessness		
	HOUS - Supportive housing required		
Immigration (IMM)	IMM - No status		
	IMM - Refugee claim in progress		
	IMM - Removal/Deportation		
	IMM - Settlement issues		
	IMM - Sponsorship issues		
Income and benefits (INC)	INCOM - Debt		
	INCOM - Delay in application process		
	INCOM - Lack of income		
	INCOM - Money management/Budgeting		
	INCOM - Need to apply for a benefit		
	INCOM - Poverty		
Legal issues (LEG)	LEGAL - Arrest/Detention		
	LEGAL - Charge		
	LEGAL - Conviction		
	LEGAL - Incarceration		
	LEGAL - On bail		

	LEGAL - Probation/Parole	
Current Safety Concerns	SAFE - Child abuse	
	SAFE - Domestic violence	
	SAFE - Emotional abuse	
	SAFE - Physical abuse (robbed, mugged)	
	SAFE - Self-harm	
	SAFE - Sexual abuse	
	SAFE - Unsafe living conditions	
Social/Personal Concerns	SOC/PER - Discrimination	
(SOC)	SOC/PER - Grief/Loss	
, , , , , , , , , , , , , , , , , , ,	SOC/PER - Relationships/Family issues	
	SOC/PER - Sexual orientation/Gender identity	
	SOC/PER - Social isolation	
Well-being (WELL)	WELL - Access to healthcare	
	WELL - Alcohol/Substance use	
	WELL - Client disclosed injecting or inhaling substance(s)	
	WELL - Emotional/mental health	
	WELL - Personal care	
	WELL - Physical health	
	WELL - Risk for HIV, Hep C & STI	
	WELL – Smoking	

III. Types of Referrals (Outgoing)

Referral (Outgoing)	Search
Addiction Services	ADD-Addiction services
Clinical	CLIN-Health care facility/hospital
	CLIN-Health care professional
	CLIN-Hep C clinic/testing
	CLIN-HIV Clinical Care
	CLIN-PEP/PrEP
Community	COMM-Bathhouse
	COMM-Community food bank
	COMM-Correctional Institution
	COMM-Day programs (seniors, brain injury)
	COMM-Employment support
	COMM-Faith-based organisation
	COMM-Housing provider
	COMM-Immigration clinic
	COMM-Legal aid/Legal service agency
	COMM-Non-ASO Shelter
	COMM-Online resources
	COMM-Other ASO
	COMM-Outreach
	COMM-Population-specific services (women's services, youth, Indigenous,
	etc.)
	COMM-Public Health
	COMM-Settlement agency
	COMM-Smoking cessation program
	COMM-Social service (including EI, OW and ODSP)
Harm Reduction	HARM-Harm reduction services
Mental Health	MH-Community mental health agency
	MH-Counselling service
Living with HIV	TEST-HIV testing
	TEST-STI testing/Sexual health clinic

IV. Types of Activities

Activity	Search	
Case Management	CASE-HIV Case management session	
	CASE-Intended goal - Connection to HIV care	
	CASE-Intended goal - HIV management	
	CASE-Intended goal - Retention in HIV care	
	CASE-Intended goal - See progress notes	
	CASE-Intended session focus - Assessment	
	CASE-Intended session focus - Evaluation	
	CASE-Intended session focus - Implementation	
	CASE-Intended session focus - Planning	
	CASE-Intended session focus – Transition	
Clinical Services	CLIN-Adherence support	
	CLIN-Application completion	
	CLIN-Application support	
	CLIN-Appointment/Lab accompaniment	
	CLIN-Blood work/lab services	
	CLIN-Counselling/social work	
	CLIN-Counselling/Support	
	CLIN-Fibro scan	
	CLIN-Fibro test	
	CLIN-Follow up appointment	
	CLIN-HBV (antibody/antigen) test	
	CLIN-HCV antibody test	
	CLIN-HCV RNA test	
	CLIN-Health promotion	
	CLIN-Health teaching/Treatment Information	
	CLIN-HIV antibody test	
	CLIN-HIV specialist	
	CLIN-Individual advocacy	
	CLIN-Intake and assessment	
	CLIN-Mental health services	
	CLIN-Nutritional services	
	CLIN-Pharmacy services	
	CLIN-Pre/post-test counselling (STIs)	
	CLIN-Primary care	
	CLIN-Reproductive health services	
	CLIN-Sexual health counselling	
	CLIN-Specialty care	
	CLIN-Support groups treatment	
	CLIN-Treatment information	
	CLIN-Vaccinations	
Complementary Therapies	COMP-Acupuncture	
	COMP-Art/Dance	
	COMP-Chiropractic	
	COMP-Homeopathy/Naturopathy	

	COMP-Massage (Reiki, Shiatsu, Reflexology, etc.)	
	COMP-Meditation/Yoga	
	COMP-Nutrition services	
Service Coordination	COORD-Advocated for client	
	COORD-Case conference (without client present)	
	COORD-Contacted other service providers on client's behalf	
	COORD-Discussed the case with other professionals (internal and external)	
	COORD-Filled in forms or documents	
	COORD-Searched for information	
	COORD-Service Navigation	
	COORD-Staff travels to/from client appointment	
Counselling/ General Support	COUN-Aging	
	COUN-Bereavement services	
	COUN-Counselling session (clinical)	
	COUN-Disclosure	
	COUN-Early years counselling	
	COUN-Emotional well-being	
	COUN-Employment services (interview skills, resume writing, etc.)	
	COUN-Financial counselling (debt management, budgeting, etc.)	
	COUN-Harm reduction (substance use)	
	COUN-Health promotion	
	COUN-Hepatitis	
	COUN-HIV Pre/post-test counselling	
	COUN-HIV symptoms management	
	COUN-Housing	
	COUN-Incarceration issues/Release planning	
	COUN-Interpretation/Translation	
	COUN-Intervention	
	COUN-Mental health	
	COUN-Nutritional services	
	COUN-ODSP ES Services provided	
	COUN-PEP/PrEP	
	COUN-Physical Health	
	COUN-Relationships/Social supports	
	COUN-Risk reduction (safer sex)	
	COUN-Settlement services	
	COUN-Smoking cessation	
	COUN-Stigma/Discrimination	
	COUN-Treatment information	
	COUN-Treatment/medication adherence	
	COUN-Wellness check	
Food Programs	FOOD-Community kitchen/meal program	
	FOOD-Ensure Meal replacement/Supplements (vitamins)	

	FOOD-Family box	
	FOOD-Food bank	
	FOOD-Food hamper/Holiday food basket	
	FOOD-Food voucher/Gift card	
	FOOD-Groceries	
Intake	INTAKE-Determine eligibility for agency services	
	INTAKE-Engagement	
	INTAKE-Orientation to the agency	
	INTAKE-Preliminary assessment of priorities	
	INTAKE-Program specific intake	
	INTAKE-Set up client file	
Other	PRAC-Assistance with Trillium premiums	
	PRAC-Assistance with wills/insurance/tax/legal information	
	PRAC-Childcare subsidy	
	PRAC-Clothing (incl. bedding, toiletries)	
	PRAC-Dental	
	PRAC-Financial assistance (application fees, tuition, etc.)	
	PRAC-Free service/event (i.e. copies, event tickets)	
	PRAC-Gift cards, non-food	
	PRAC-Holiday/General gift basket	
	PRAC-Home startup/Household items	
	PRAC-Transportation (rides provided)	
	PRAC-Transportation (taxis)	
	PRAC-Transportation (tickets) (\$ value)	
Students	STU-Student placement hours	
Support Groups	SUP-Support groups	
Volunteer	VOL-Administration	
	VOL-Counselling	
	VOL-Education & community development (newsletter, kits)	
	VOL-Fundraising	
	VOL-Involved in hiring process	
	VOL-IT support	
	VOL-Outreach activities	
	VOL-Policies and procedures	
	VOL-Practical support (includes visits)	
	VOL-Serve on board/advisory committee	
	VOL-Special events (e.g., mall display, Pride)	

V. Glossary of New terms

Historical Term (PENELOPE)	Current Term (TREAT)	
Intake Wizard	Register Member	
Individual Profile	Demographics	
Profile tab, demographic		
Individual ID	OCASE ID	
Relationship (on Case screen)	Client Group Task or Notification text (?): complete connection to care for PHA	
Individual	Participant	
(client, community member, service user etc.)		
Relationship (on Case Screen) a. Case Members b. Case Relationship	Participant Relationships	
Intake form and baseline information a. Demographics @ Intake	Profile	
 a. Collateral Contact Type b. HIV specialist - Name and contact Family physician - Name and contact 	Client Profile tab a. Emergency Contact b. Contact	
Client Engagement-Baseline Information c. Immigration Status	c. Birthplace History	
Additional Client Informationa.HIV/Hepatitis C Statusb.Accessibility Informationc.Current medications	Medical tab a. Connection to Care b. Hospitalizations or ER Visits c. Medication and Allergies	
Client Engagement	Housing tab	
Housing Situation		
Employment status	Employment tab	
[custom]	Legal tab	
Safety Concerns	Safety Concerns to Others tab	
a. Individual Notes Intake Summary	Notes a. Individual Note	
Intake Process	Enrollment	
Client Demographics Intake a. Referral Source By Category b. Referral Source Contact Information	Referrals a. Referral Source	

Service File	Program
Service Event	Encounters
Activity	Appointments
Event Type	Encounter Type
	Individual Note
Service/Cart Item	Service Unit/Activity Item
Case Note (Session Note)	Notes a. Progress Note
Groups	Groups
a Informal Series/Group List	a Program
b. Informal Event/Group Event	b. Group Activities
c. Roster (Expected or Registered Attendees)	c. Members (Participants)
Presenting Issues	IPCC (Interdisciplinary Plan Client Care)
	Referrals (Outgoing) tab
a. External Referrals	a. Current issue
b. Agency Details	b. Issue detail
Pre-enrollment	Waitlist



VII. Activity Units Time Conversion

The new OCASE system tracks time by the minute, and this is tracked under **Activities- Units**. Please see the below chart for converting hours to minutes for recording units of activities.

For example: when recording a volunteer's hours doing administrative work, you will record one hour as 60 units.

Time (in Hours)	Time (in Minutes)	Units (in minutes)
30 minutes	30 minutes	30 units
45 minutes	45 minutes	45 units
1 hour	60 minutes	60 units
1.5 hours	90 minutes	90 units
2 hours	120 minutes	120 units
2.5 hours	150 minutes	150 units
3 hours	180 minutes	180 units
3.5 hours	210 minutes	210 units
4 hours	240 minutes	240 units
4.5 hours	270 minutes	270 units
5 hours	300 minutes	300 units
5.5 hours	330 minutes	330 units
6 hours	360 minutes	360 units
6.5 hours	390 minutes	390 units
7 hours	420 minutes	420 units
7.5 hours	450 minutes	450 units
8 hours	480 minutes	480 units