OCASE TREAT User Guide

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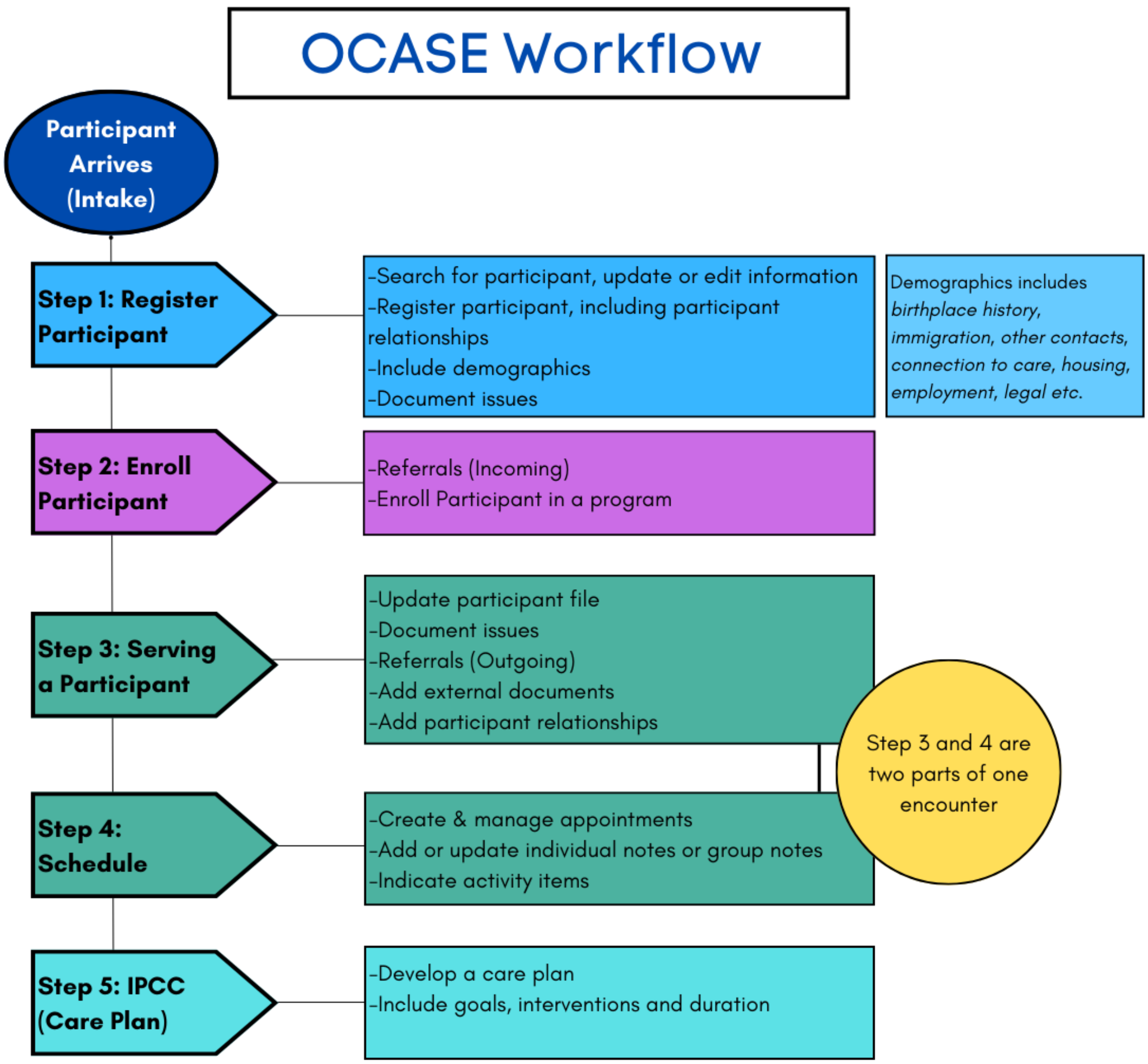
OCASE User Guide

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.

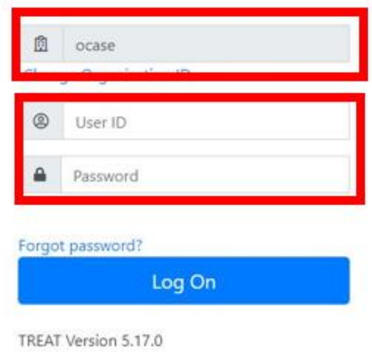


User ID Set up

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

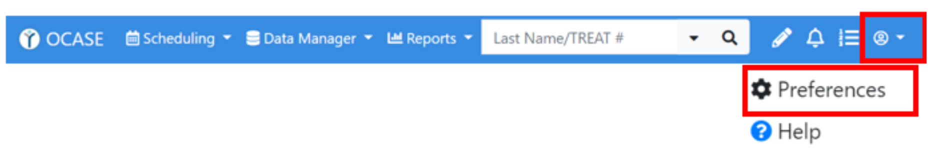


Password

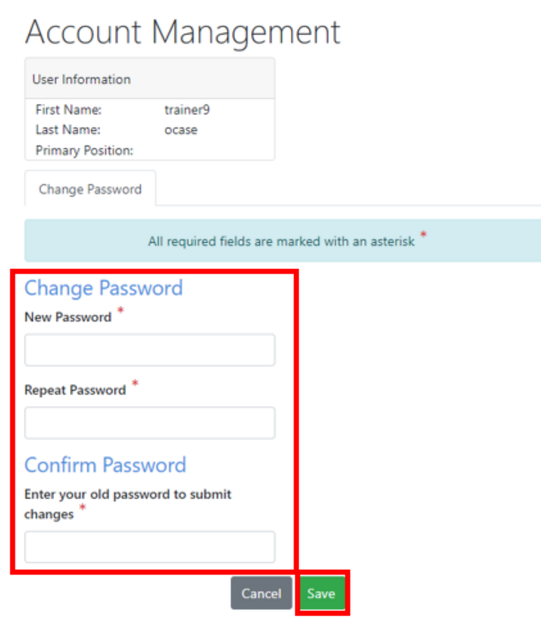
You will receive a temporary password, and will need to update your password for security purposes. In this case you will see a prompt to change your password.

Keep track of your temporary password to complete the process successfully

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



2. The **Change Password** option will appear on the screen
3. Select **Save**



If you are locked out of your account, contact your administrator or designate.

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 co-signature.
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

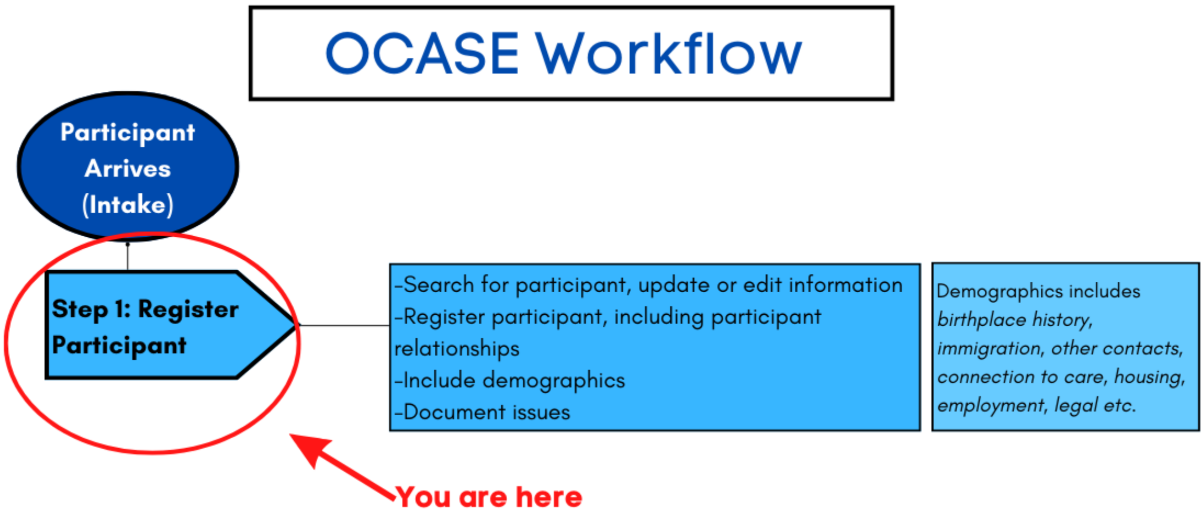
In this section, you will:

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

Additional Resources:

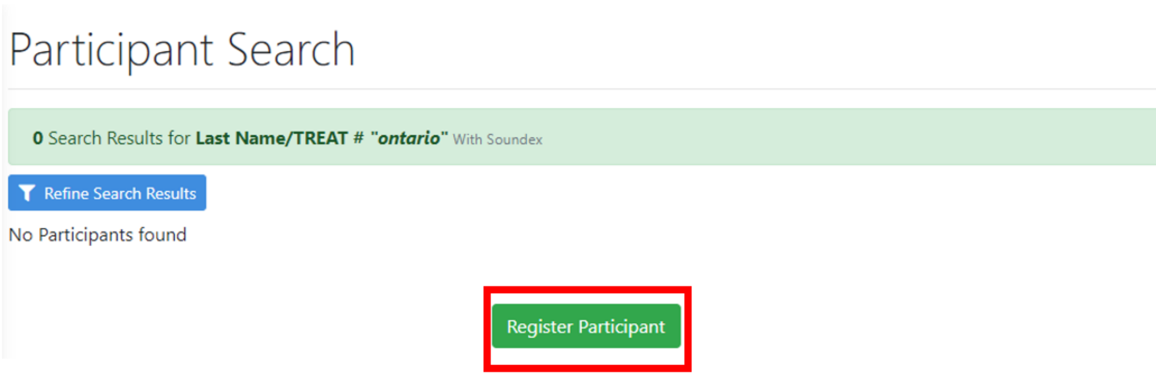
- Review OCASE training video ***How to Register Participant*** for more information.
- Review OCASE training video ***How to Search for a Participant*** for more information.
- Review the OCASE Training video ***Participant Profile*** for more information.

This is Step 1 in the OCASE workflow:

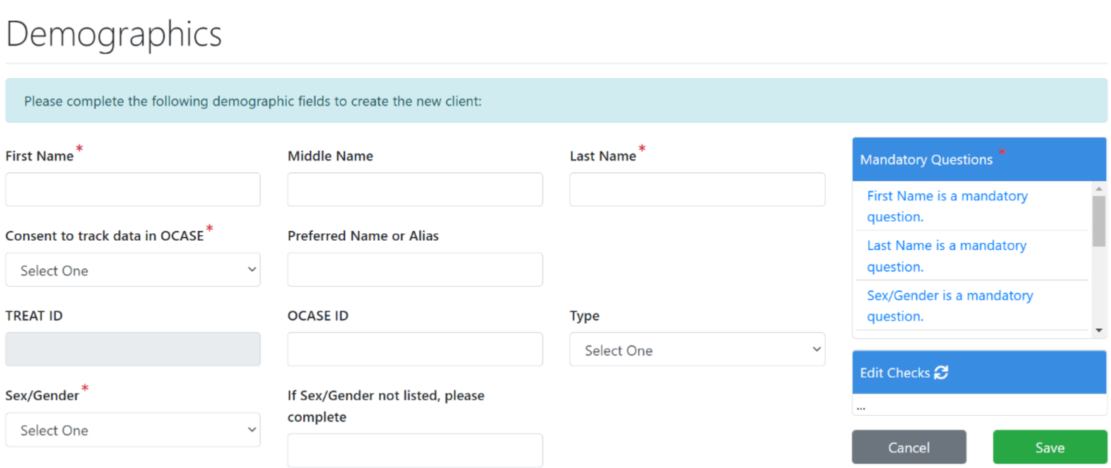


Steps to register a participant

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.



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



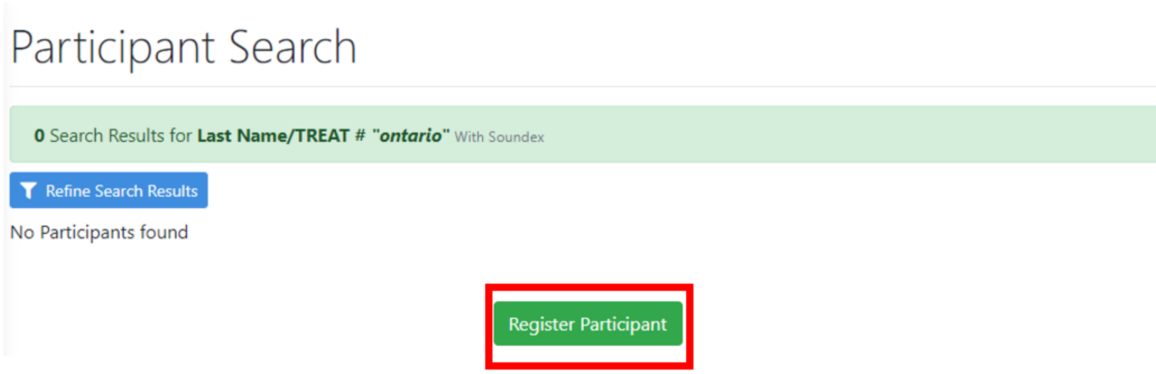
Participant File

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

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:

____

____

____

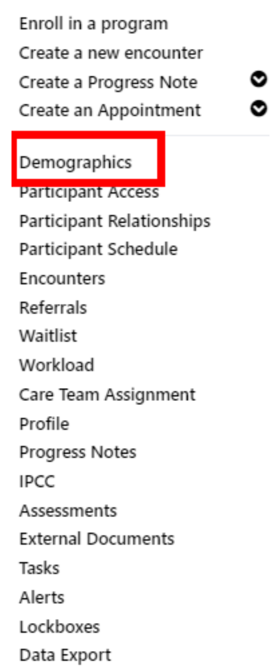
3. If you cannot find the participant on the first search, perform an Advanced Search.
    - If you cannot find a participant it could also mean they are not registered in the system

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.

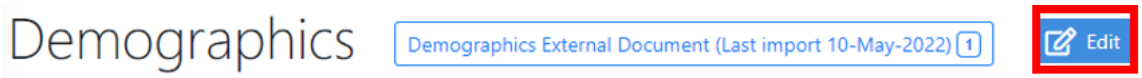
Ensure that you have opened the participant file, by checking for their name in the yellow box at the top of your screen.

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.



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

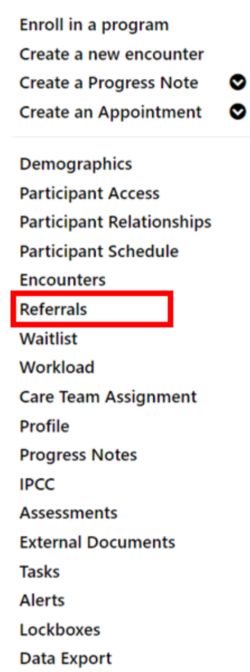


Referrals (Incoming)

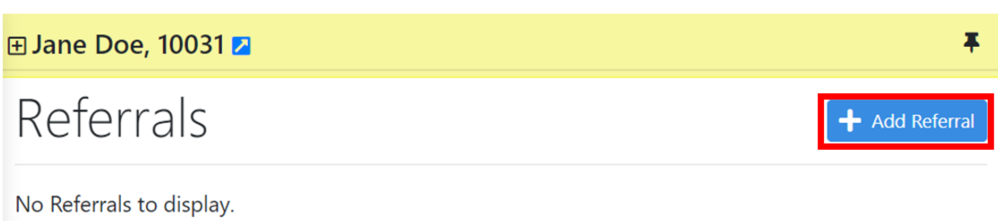
This is used for **incoming referrals only**. Incoming Referrals could be document written, verbal and cross-program internal referrals.

Steps to add referrals (incoming)

1. With the participant is in context select Referrals from the left Navigation Pane.



2. On the Referral page, select **Add Referral**, fill in the mandatory (and useful) fields



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:

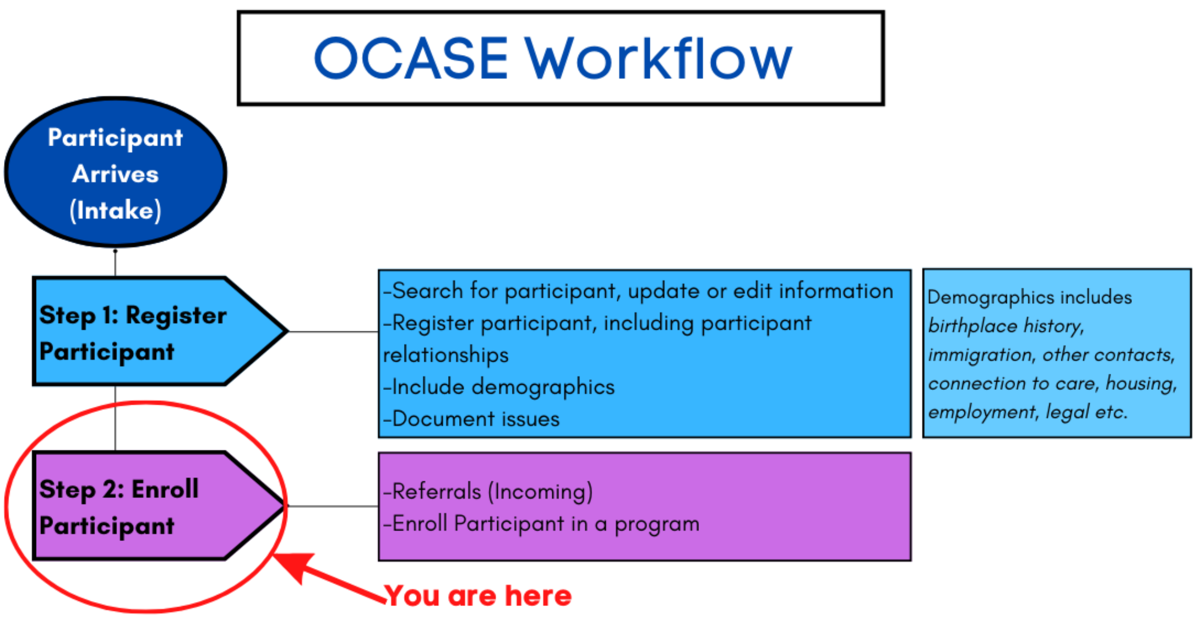
- Input incoming referrals, and enroll a participant in a program.

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).

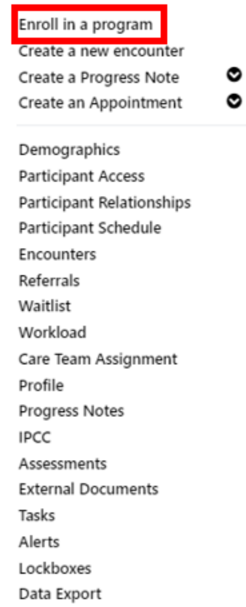
This is Step 2 in the OCASE workflow



Enroll a Participant in a Program

Steps to enroll a participant in a program

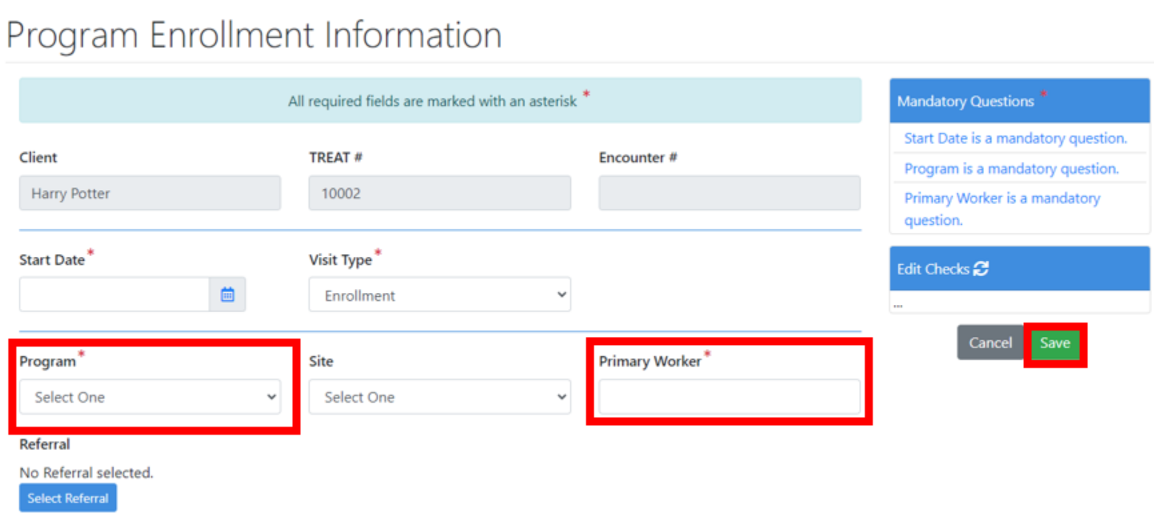
1. While in the participant file, select **Enroll in Program** from the Navigation Panel



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. On a participant's **Demographics** screen, select the yellow box at the top of the screen to view a detailed list of programs that the participant is enrolled in.

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**



> 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.

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. Input the updated enrollment status, the end date and reason for the discharge.

Encounters

Program	Encounter #	Start Date	End Date	Status	Visit Type	Enc Type	Close Reason	
2SPIRITS-SS	0000002535	10-Feb-2023	10-Feb-2023	Scheduled	Visit	Office	--	Edit
2SPIRITS-SS	0000001753	06-Feb-2023	06-Feb-2023	Scheduled	Visit	Video Conference	--	Edit
2SPIRITS-SS	0000002499	03-Feb-2023	03-Feb-2023	Scheduled	Visit	Office	--	Edit
2SPIRITS-SS	0000001719	30-Jan-2023	30-Jan-2023	Scheduled	Visit	Video Conference	--	Edit
2SPIRITS-SS	0000004728	12-Jan-2023	12-Jan-2023	Cancelled	Visit	Office	--	Edit
ACAS-EA	0000004879	12-Jan-2023	--	Admitted	Enrollment	--	--	Edit

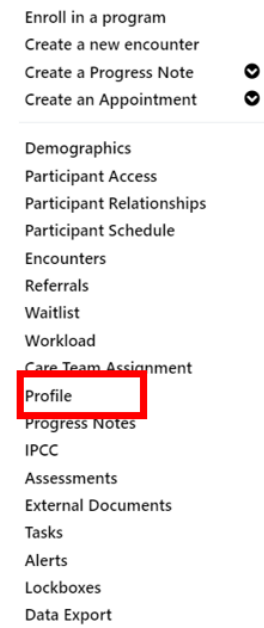
When a participant's program enrollment status is updated to any status except *'Open'*, the following information will need to be included: **End Date and Closed Reason.**
When entering **'Deceased'** as a the Closed Reason, be sure to update the **Demographics.**

Demographics

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

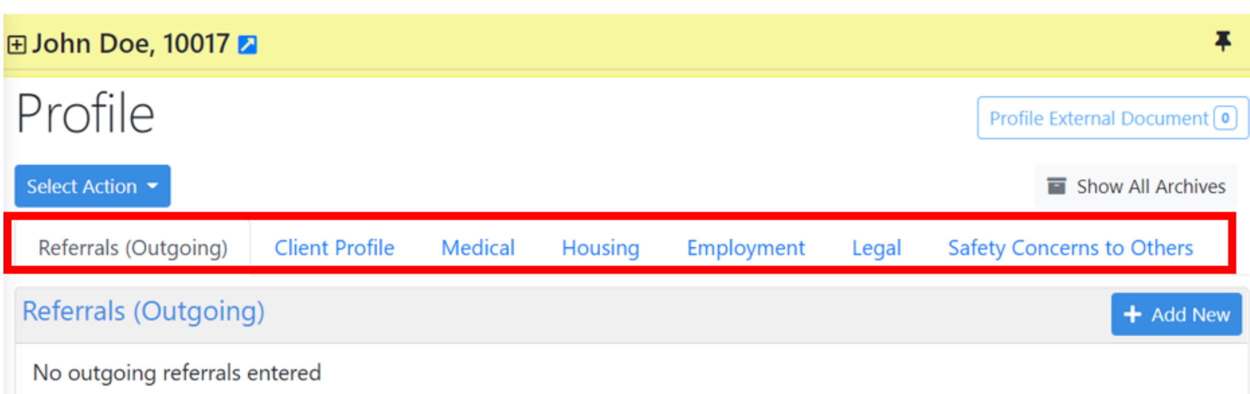
Steps to add demographics

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.

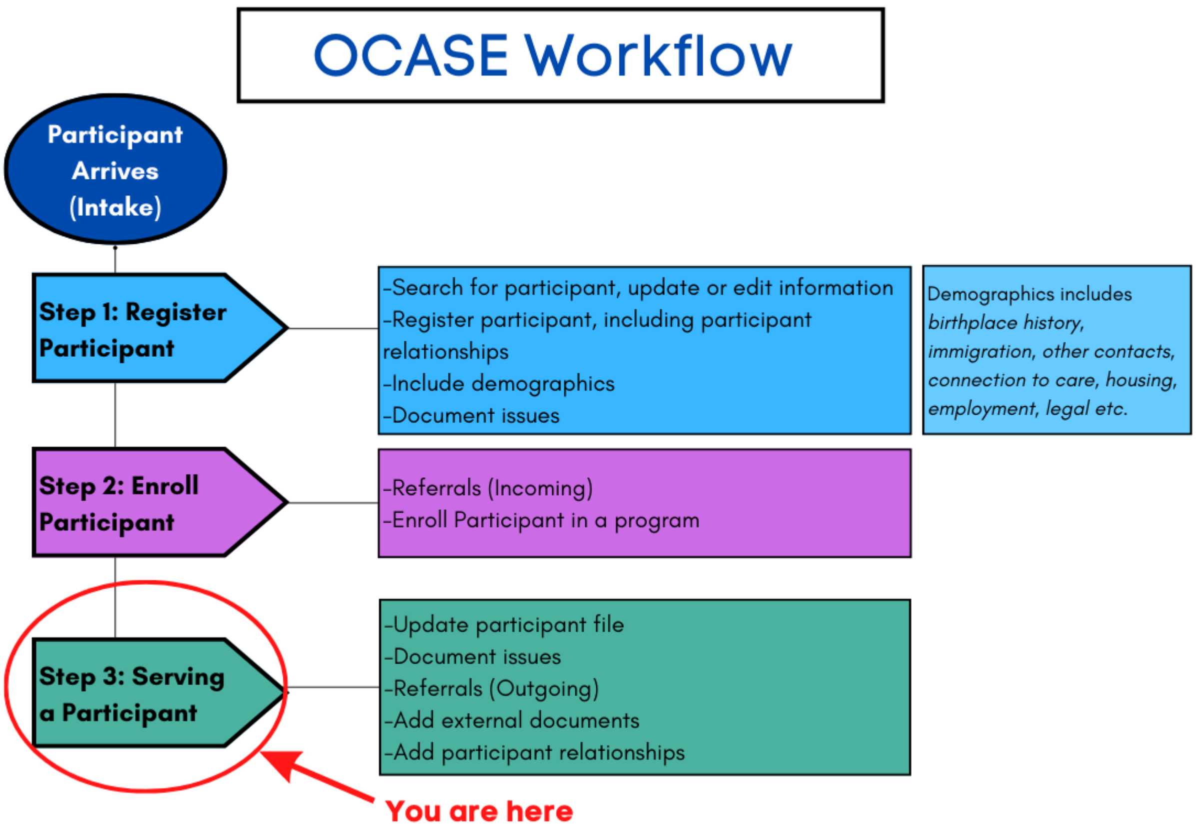


Serving a Participant

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.

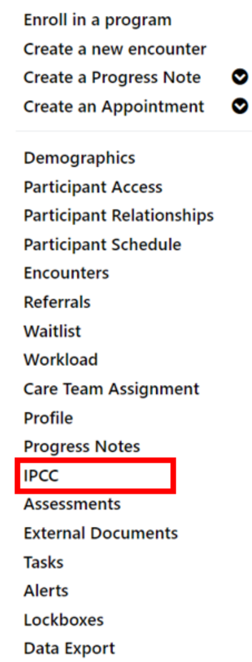
This is Step 3 in the OCASE workflow.



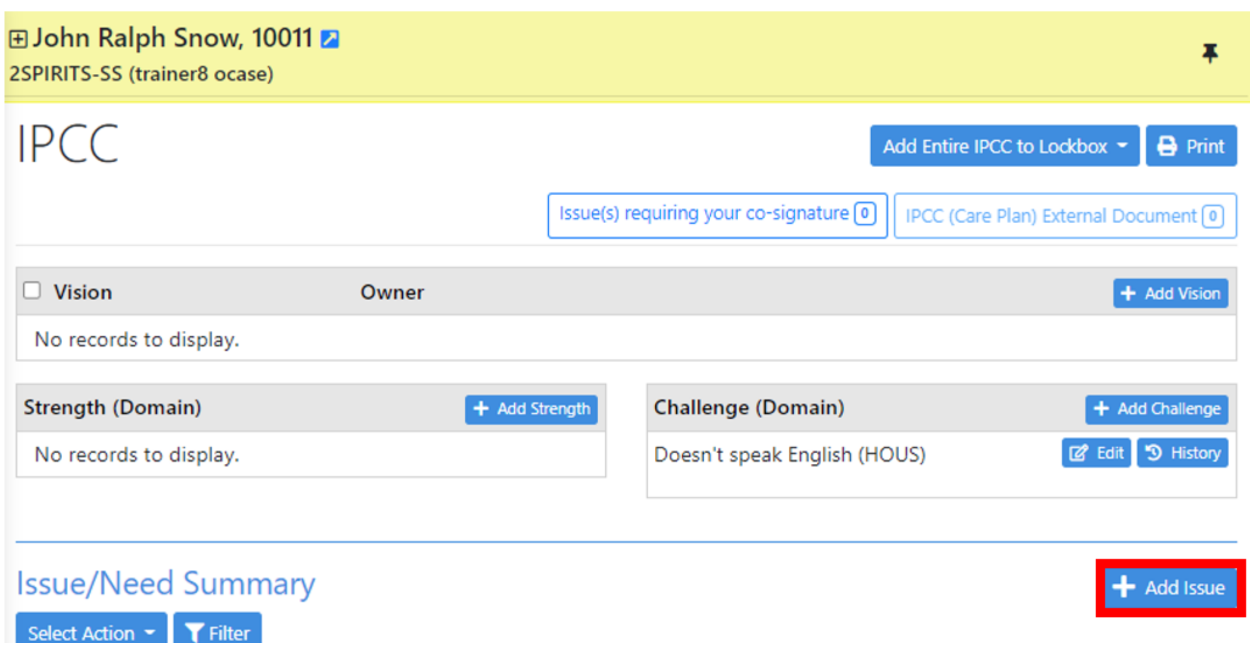
Document Issues

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.

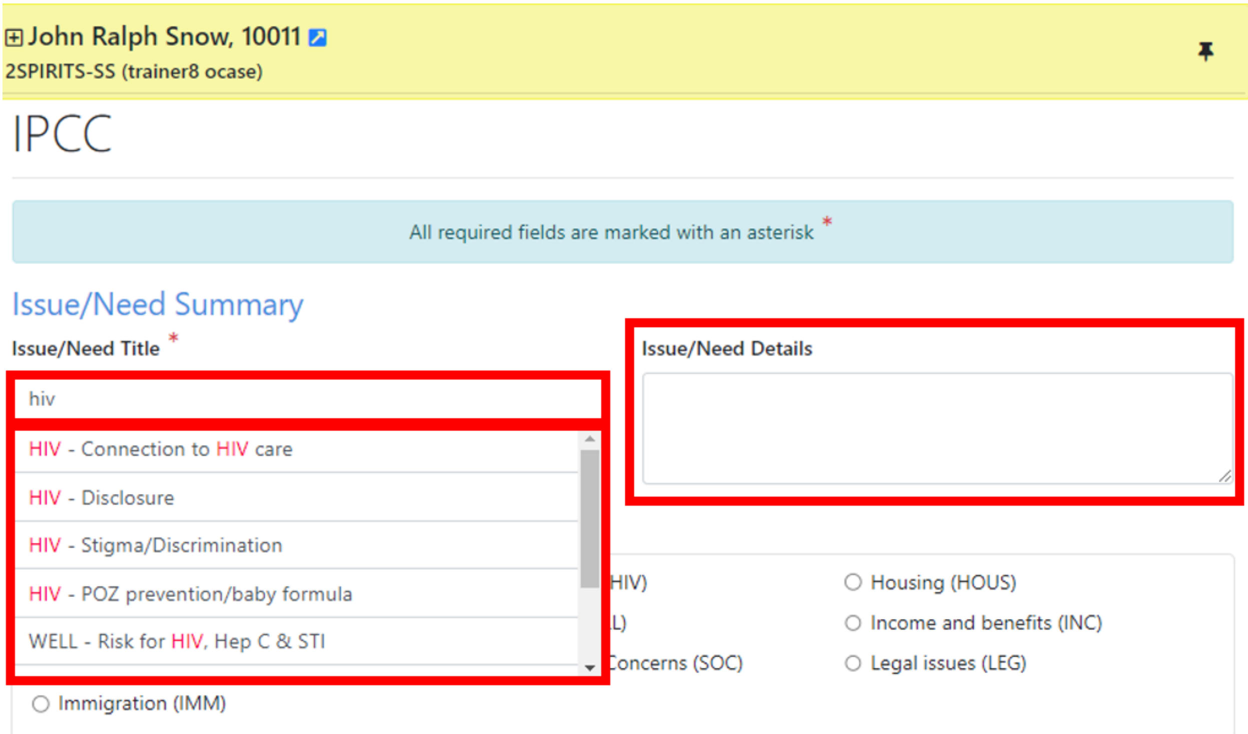
1. While in the participant file, select **IPCC** from the left Navigation Panel



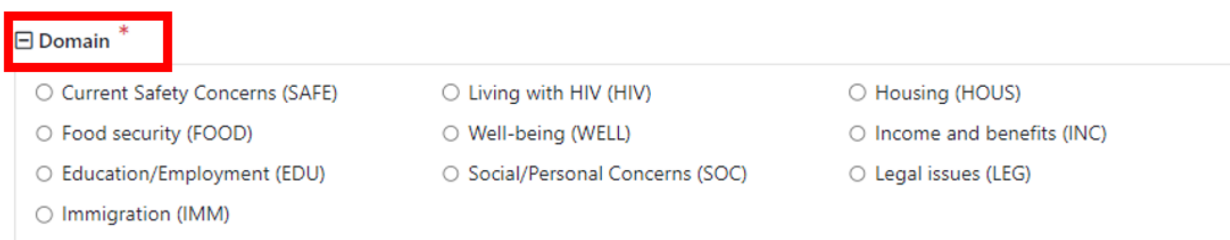
2. Select **Add Issue**



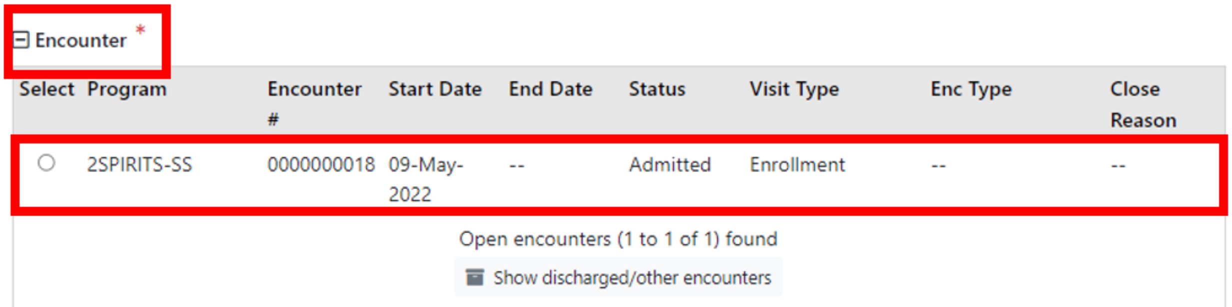
3. Begin typing the **Issue/Need Title**, this is an incremental search, as you type in an issue, a drop-down menu will appear. Include any details in the open text box.



4. Select a **Domain**



5. Select an **Encounter** that the issue is associated with



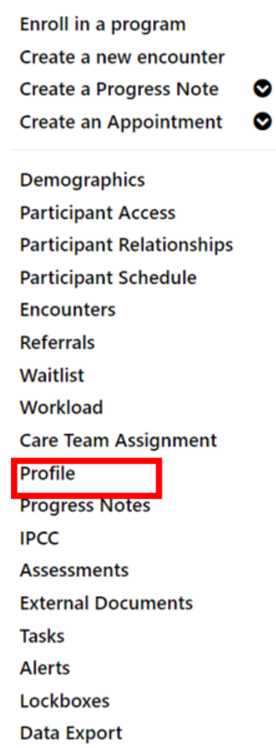
6. Select **Save.**

Referrals (Outgoing)

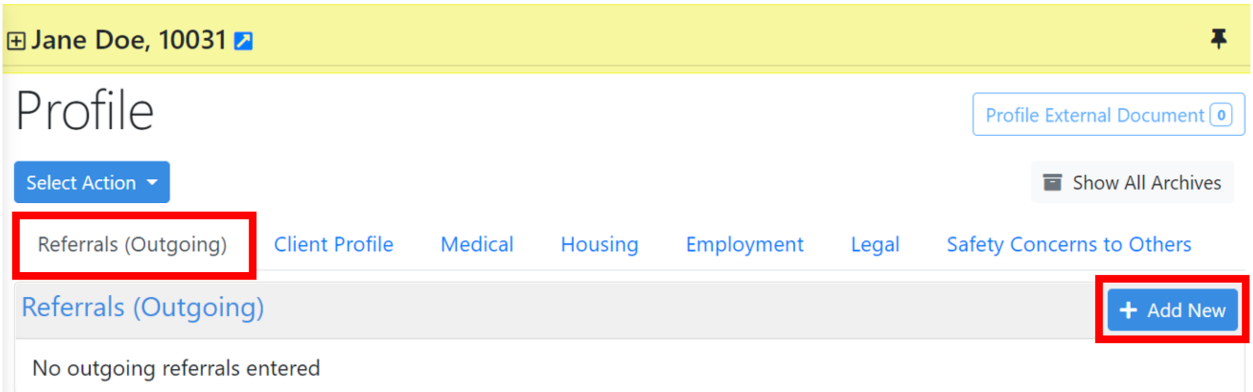
Referrals (Outgoing) indicates referrals to external agencies, programs or other organizations that you are providing to a participant. See Appendix *Types of Referrals (Outgoing)* for a full list.

Steps to document referrals (outgoing)

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



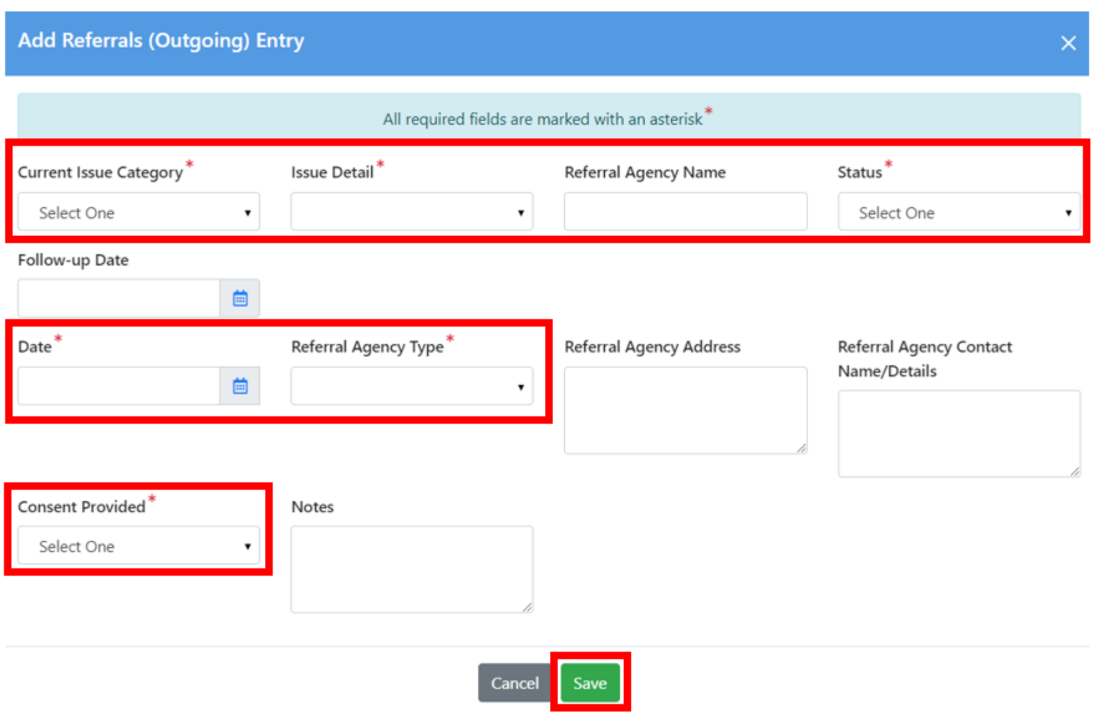
2. Select the **Referrals (Outgoing)** tab then select **Add New**



3. Input the <u>current</u> **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)
5. Input the **Referral Agency Name** that you will refer to. The Referral Agency Address and Contact Name/Details are optional

   Select a **Status**
6. Input the referral **Date**
7. Select **Referral Agency Type**

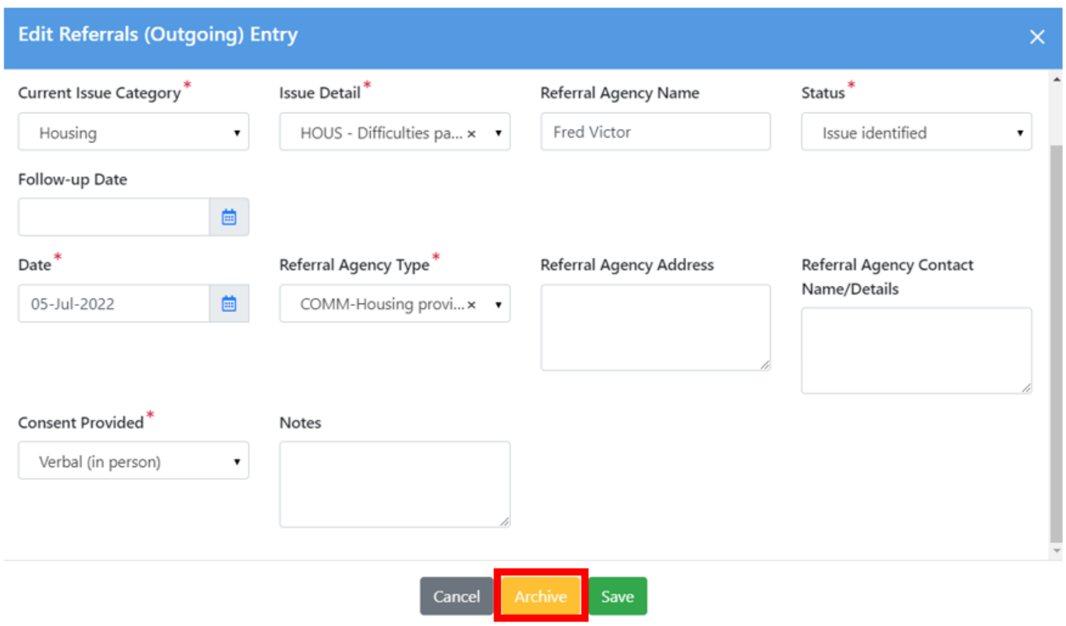
Recommendation: Input the **Follow-up Date**. Each time you edit the referral, you can change the follow-up date and click save again.



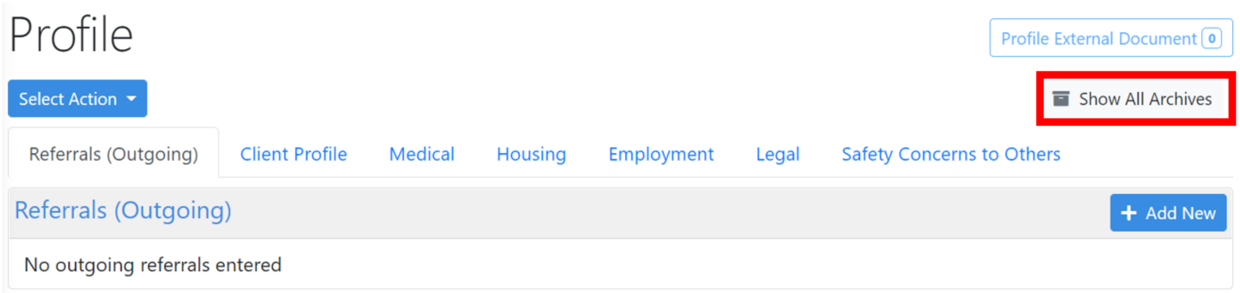
8. Select type of **Consent Provided**, then select **Save.**

Written consent can be attached using the **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.



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



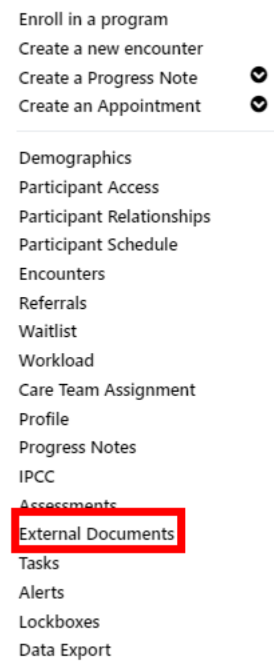
Documents

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.)

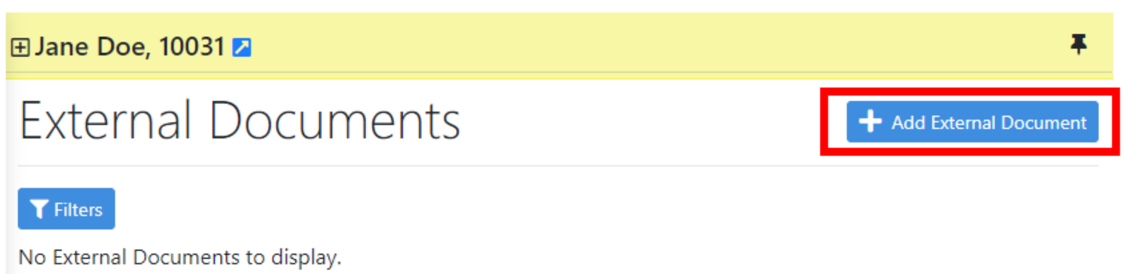
External Documents

Steps to attach external documents

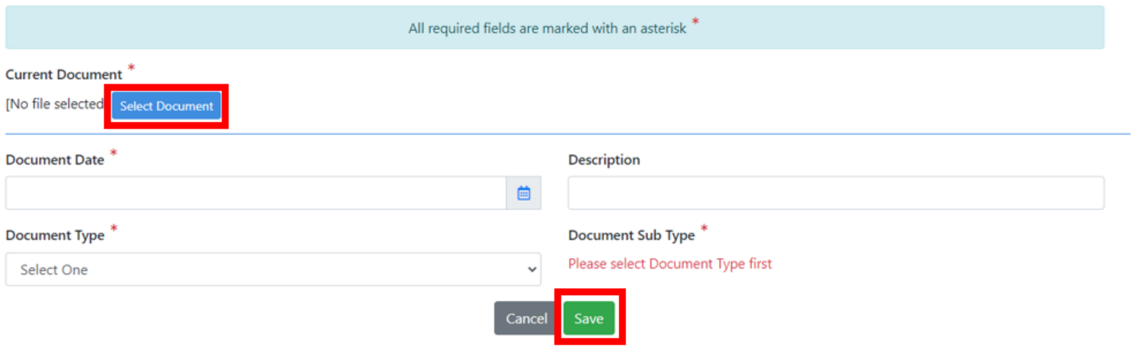
1. While in the participant file, select **External Documents** in the Navigation Pane



2. Select **Add External Document**



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

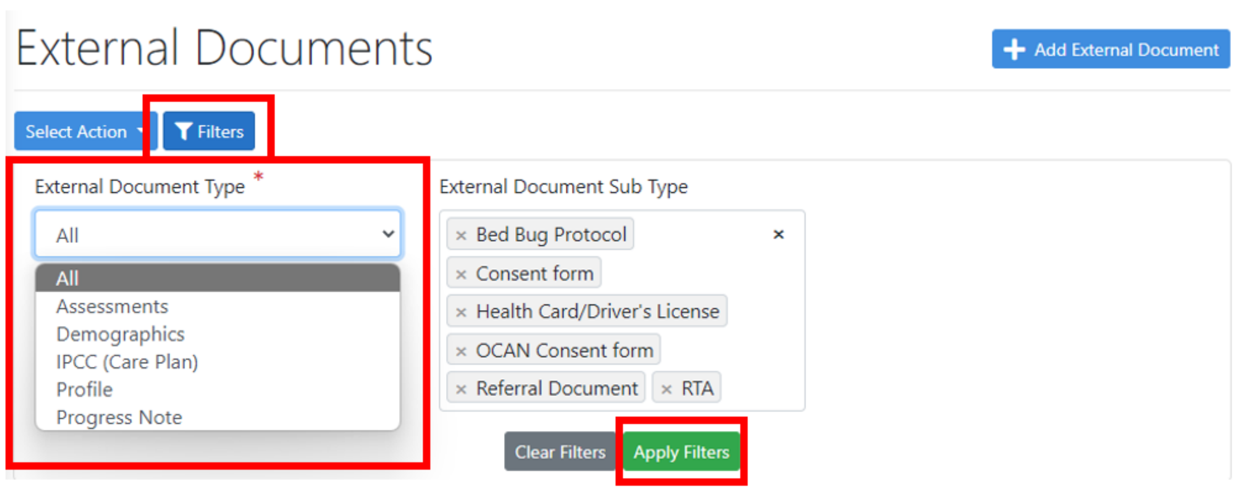


View and Filter Documents

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**

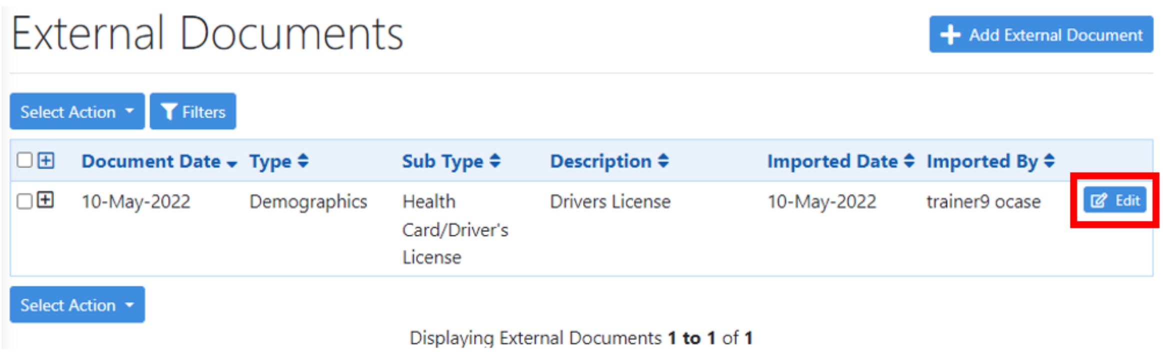


Edit External Documents

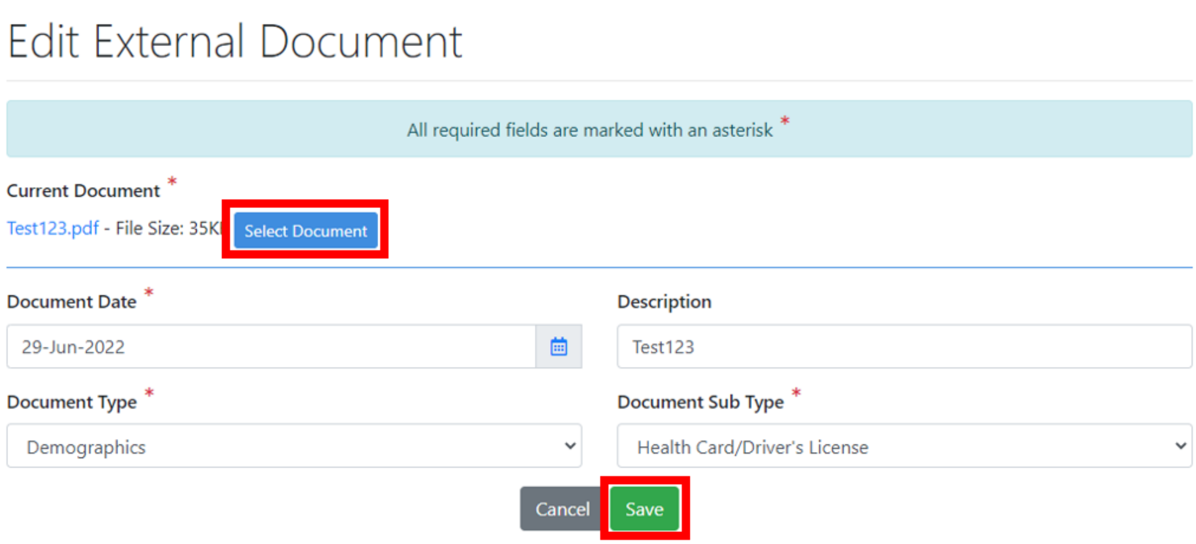
There is an option edit and update existing external documents.

Steps to edit external documents

1. Select the document, then select the **Edit** button



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**

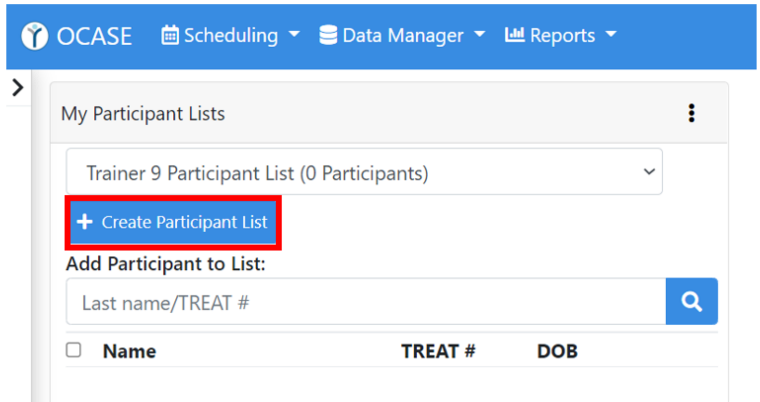


Participant List

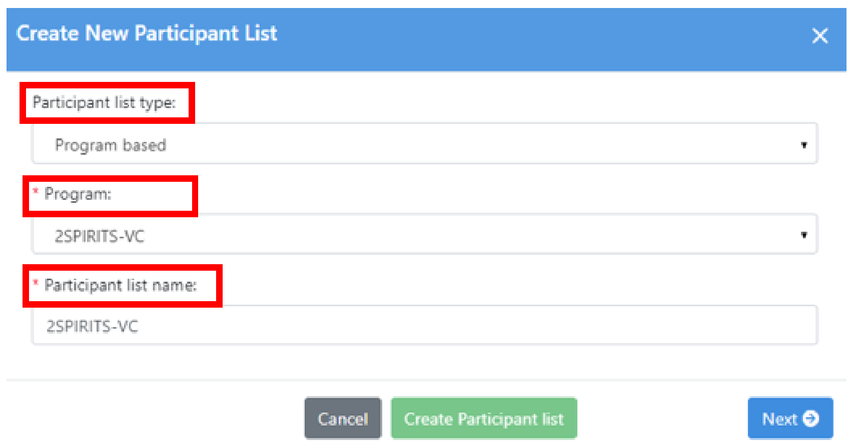
A participant list is a way to keep program lists organized within the OCASE System. For example, you can create a list for your weekly Youth Program, which includes the participants who are enrolled in that specific program. Once you have created this list, you can add bulk/group notes to keep track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

Steps to create a participant list

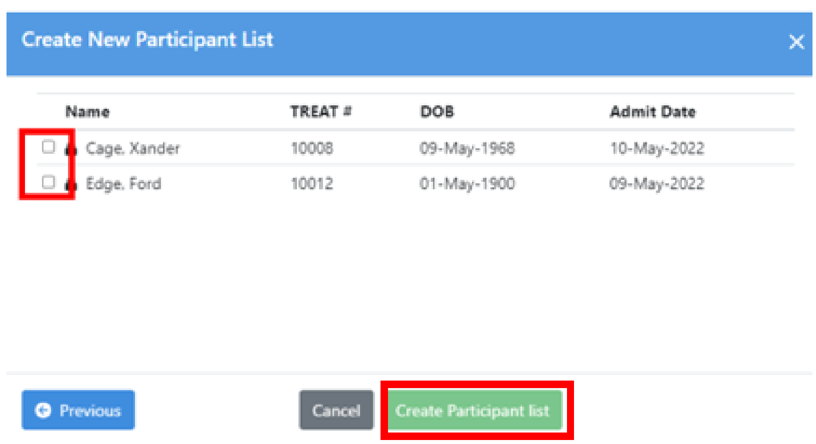
1. Navigate to the OCASE home screen
2. Select **Create Participant List** and fill in the name of the list (i.e. Youth Cooking Class)



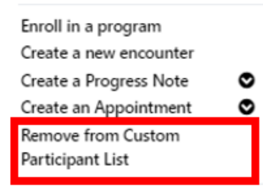
3. Select Participant List Type (Custom or Program Based), Program, and Participant List Name (this is fillable)



4. Select the participants who take part in the program.
5. Select **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:

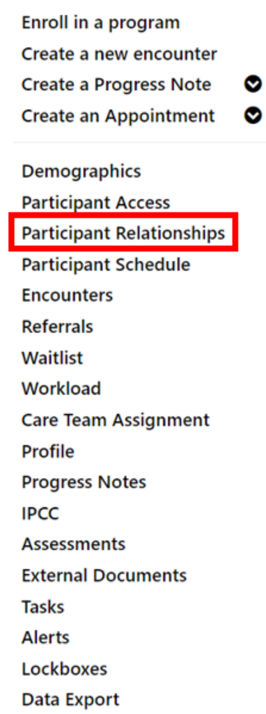


Participant Relationships

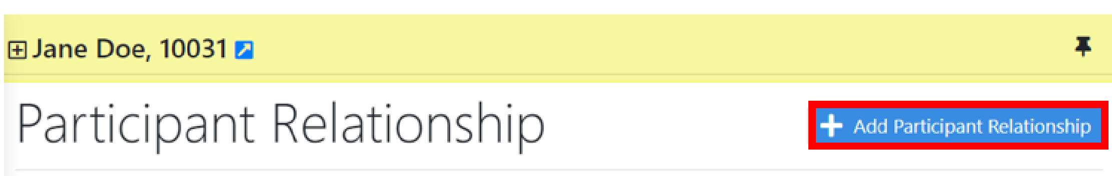
Participant relationships refers to participants who have a child, spouse/partner or other relationship enrolled at your agency.

Steps to add participant relationships

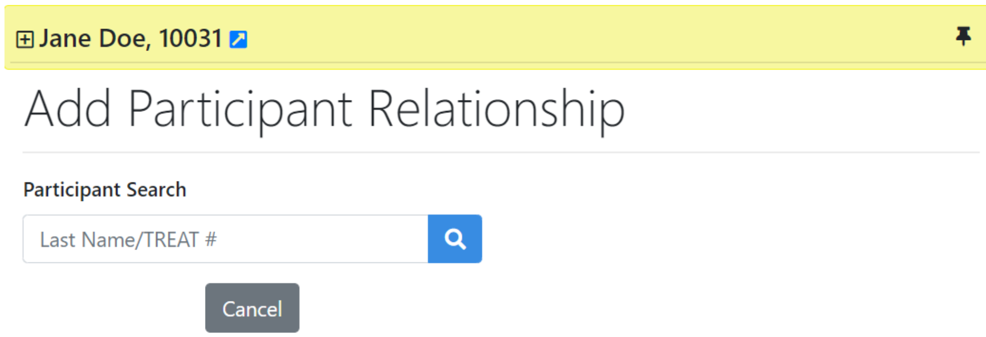
1. While in the participant file, select **Participant Relationships**



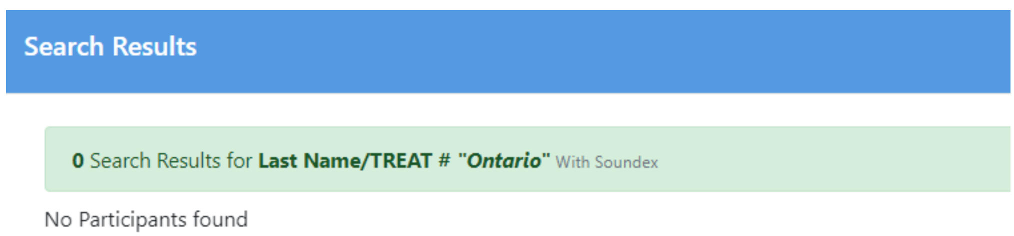
2. Once on the Participant Relationship page, select the blue button (right side) that says **Add Participant Relationship**



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

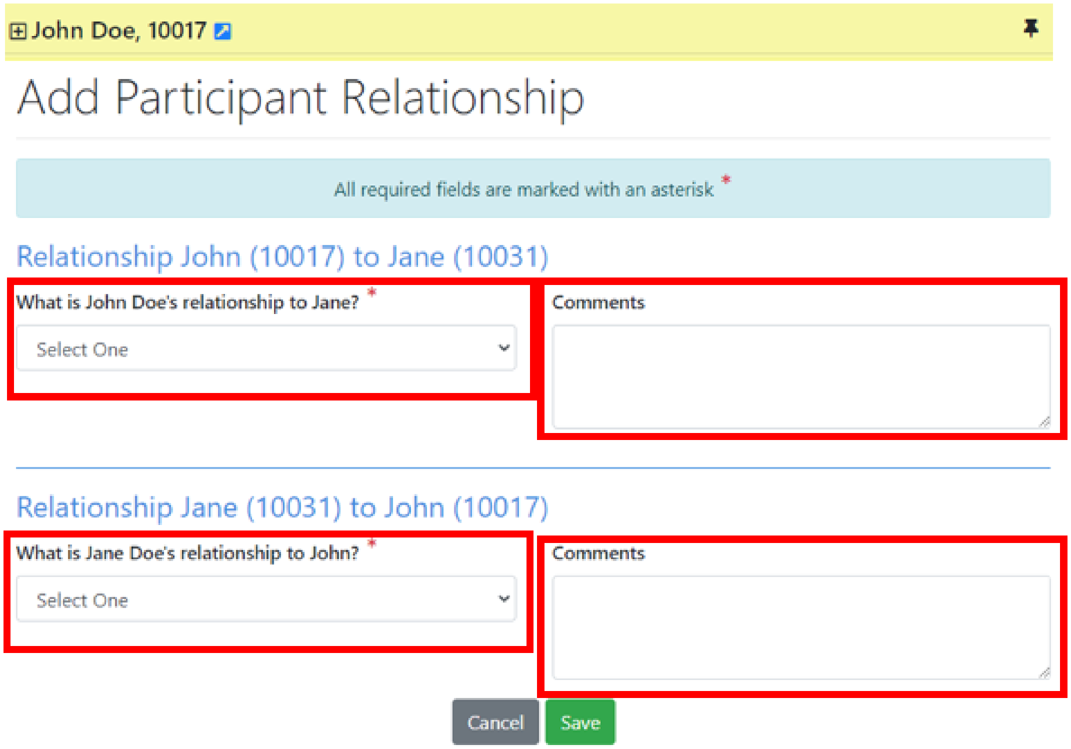


4. If the participant does not exist in the system, you will need to **register the participant** (see *Enrollment* to complete this step).



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.

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.

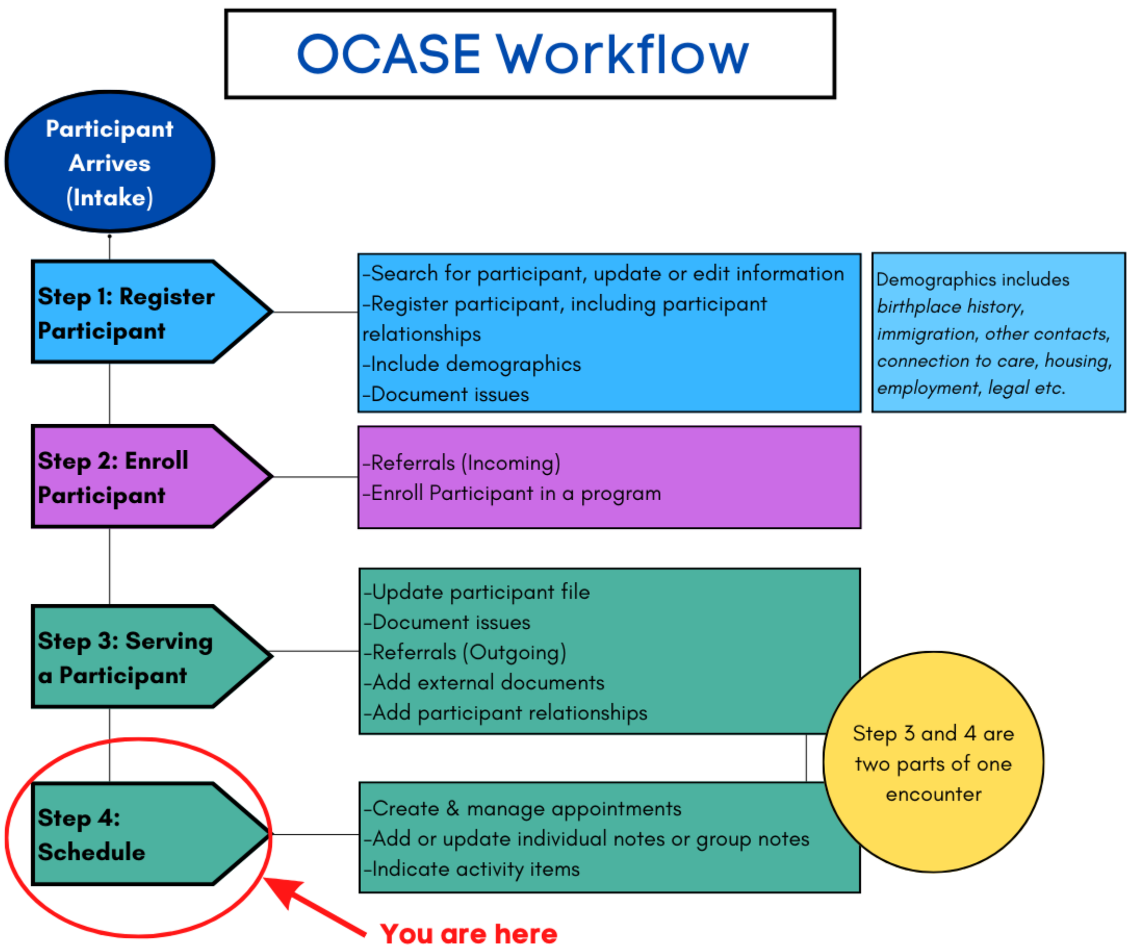
Schedule

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:

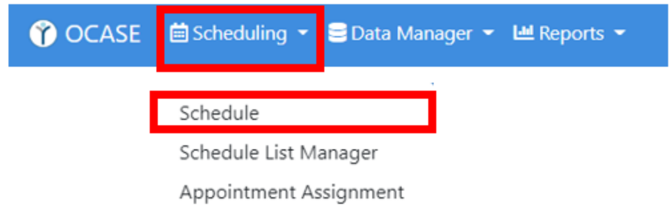
- Review the OCASE Training video ***Schedule-Add Appointments***
- Review the OCASE Training video ***Add Individual Note***
- Review the OCASE Training video ***Add an Activity***

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**

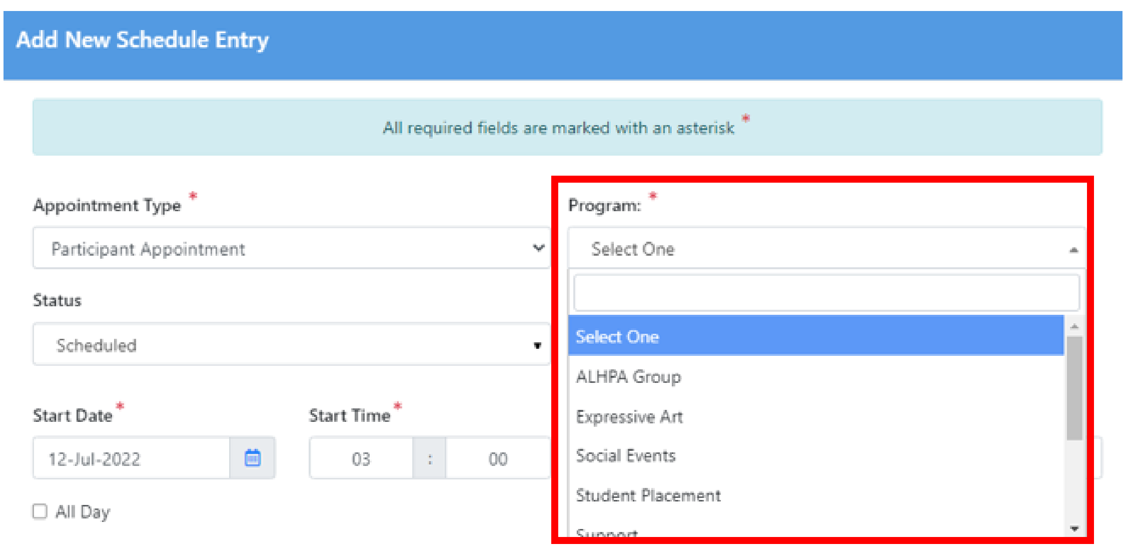


Individual Appointments

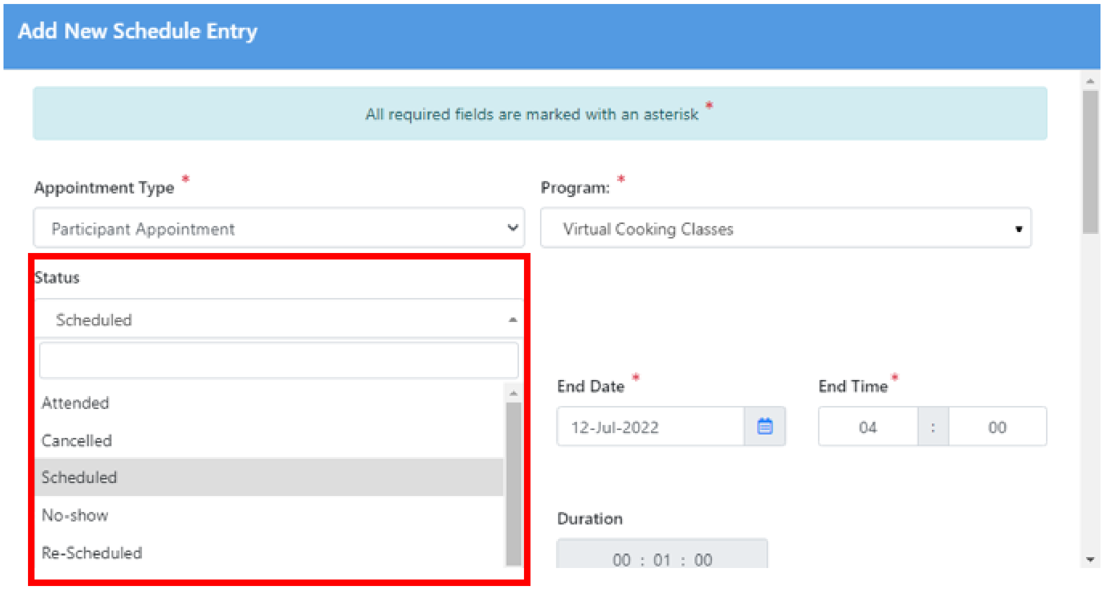
Create individual appointments within your calendar to record when you meet with a participant. These can be added before or after you interact with the participant (i.e. record a drop-in appointment, or a previously scheduled appointment).

Steps to create an appointment

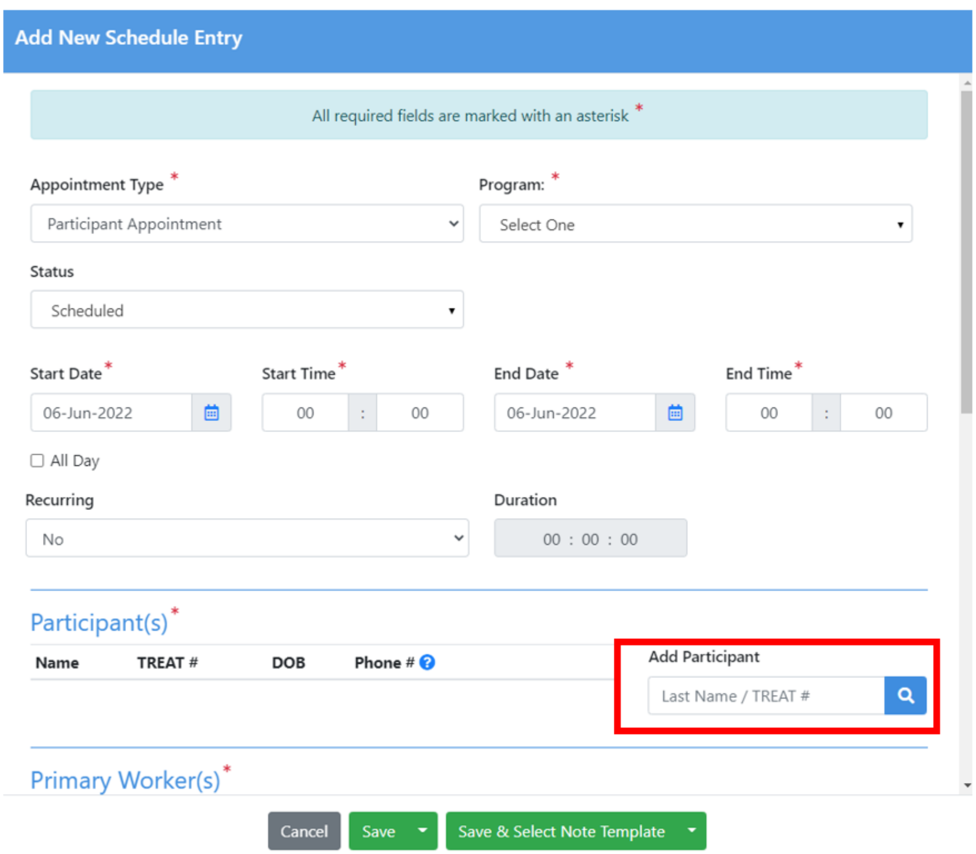
1. Open your calendar, and click *anywhere* on your calendar to begin a new calendar event.
2. Select a Program from the drop-down menu



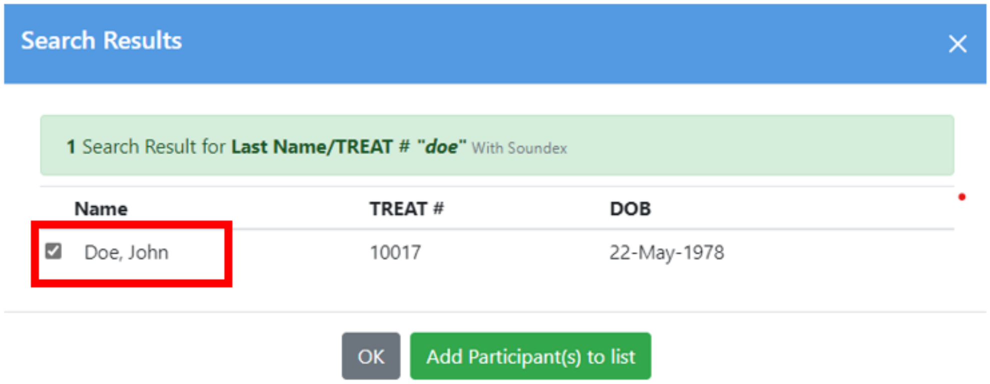
3. Select the **status** of the appointment



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**



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



Note: An **Appointment** or **Progress Note** can be **Scheduled** or **Attended** even when the participant is not enrolled. An alert/warning message will appear after saving. Select **Save** twice to override the alert/warning message.

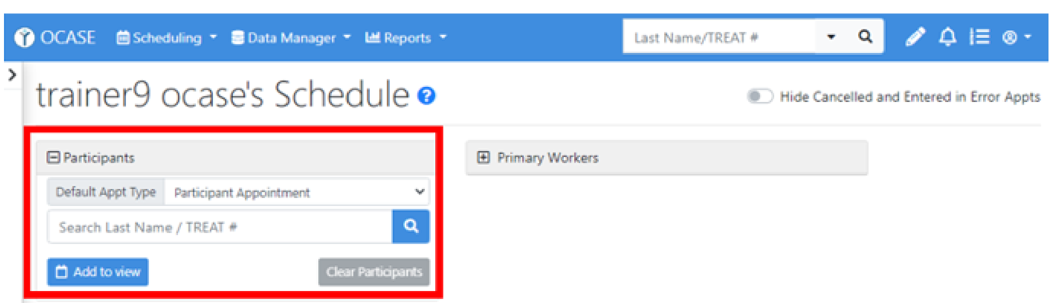
Activities are used to track the previous *service/cart items* from the PENELOPE system. For example, if you provide a gift card to a participant in a program, this is where you will track it.

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



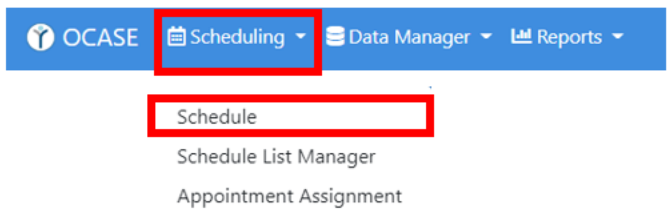
Individual Notes

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.

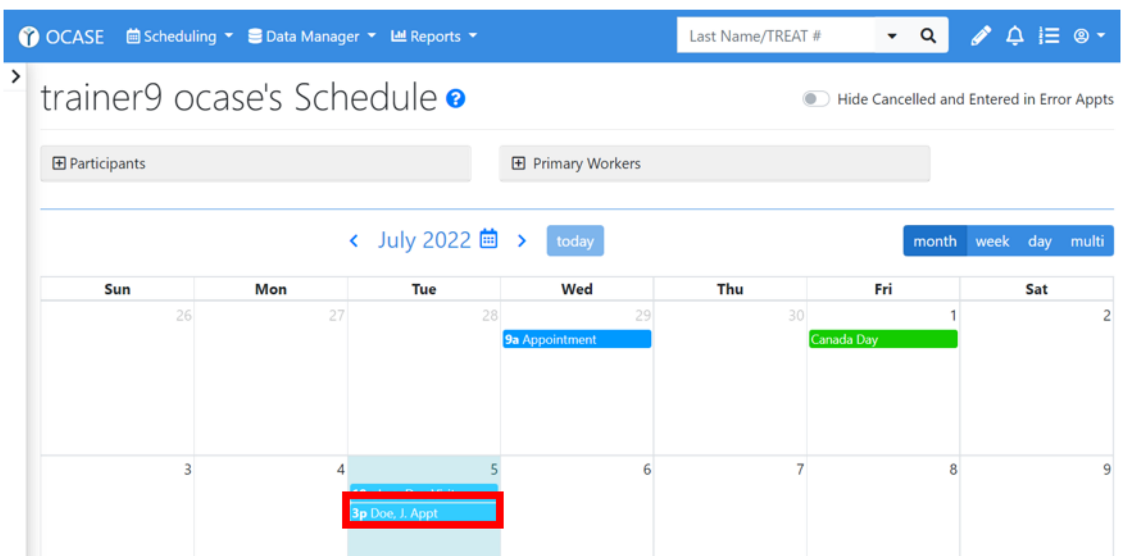
Individual notes pertain to one specific participant at a time. You are also able to view all notes attached to the participant's file

Steps to add an individual note

1. Navigate to your **schedule**

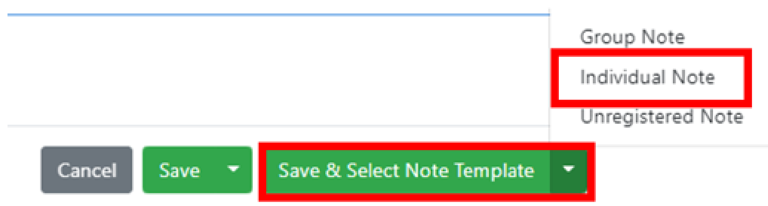


2. Select the **Activity** in the calendar that requires a note



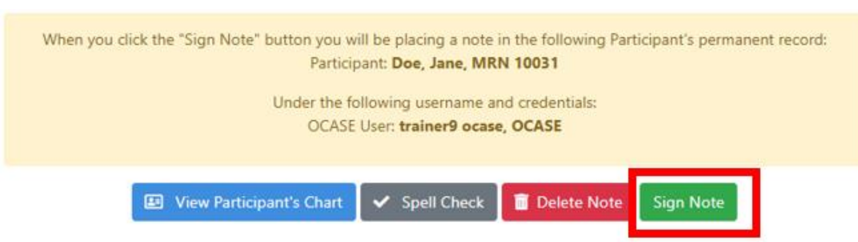
3. Select **Edit**

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



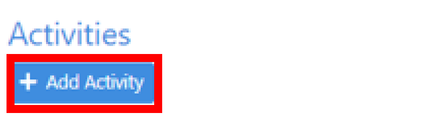
6. Fill in the **mandatory fields**
7. Scroll to the bottom and select **Sign Note**

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

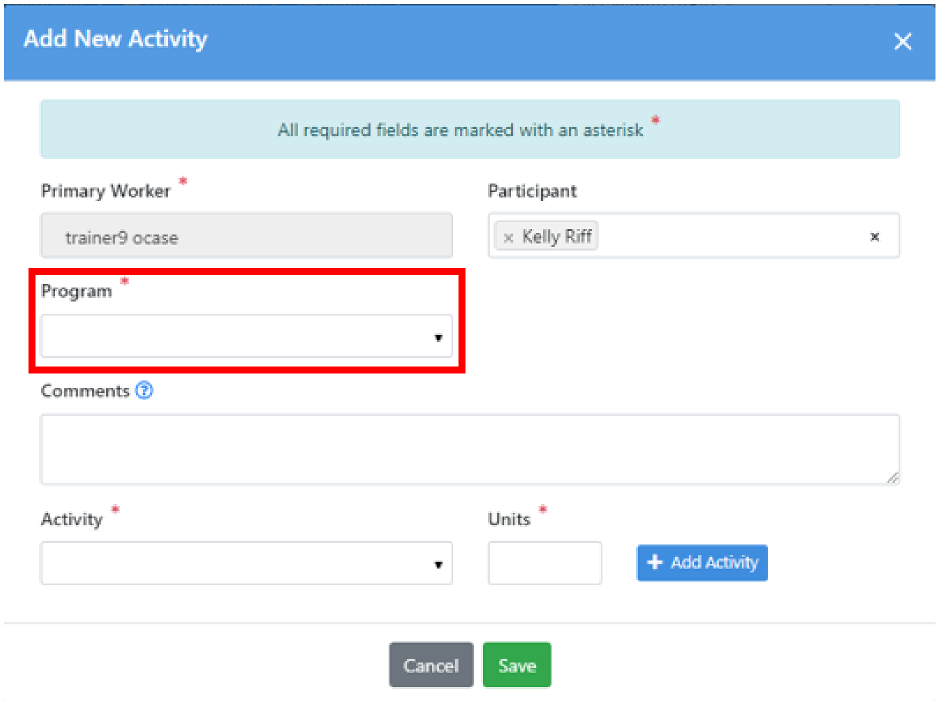


Add an activity (individual)

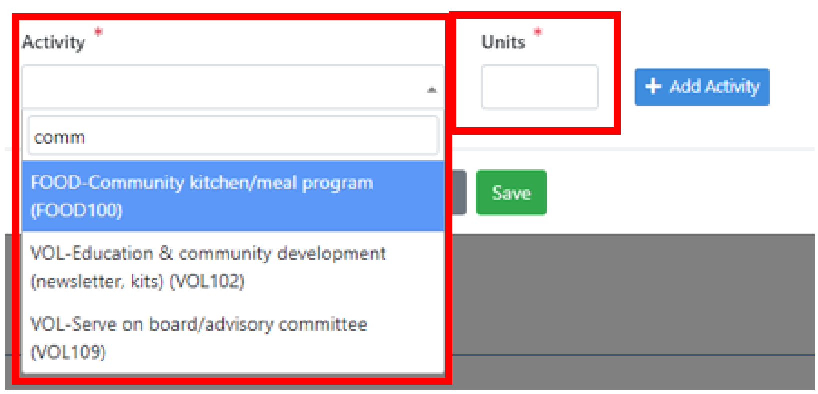
1. Follow steps 1-6 above to add an Individual Note, then scroll to the bottom of the page to **Activities**
2. Select **Add Activity**



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



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



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.

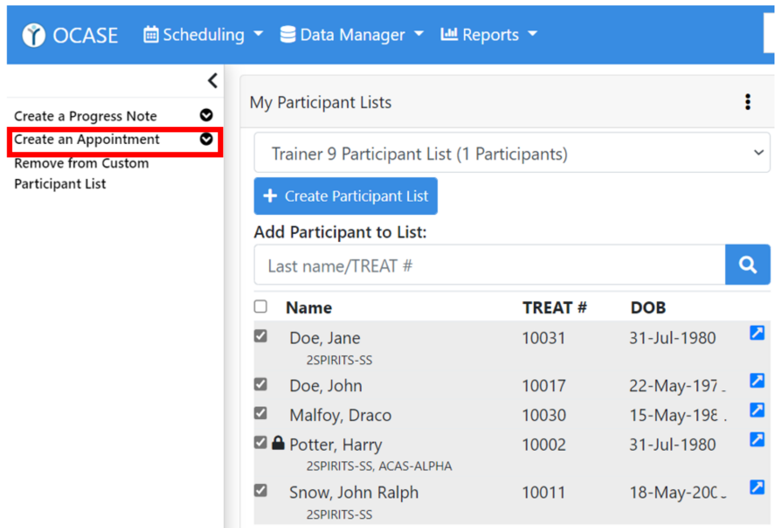
Group Appointment

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

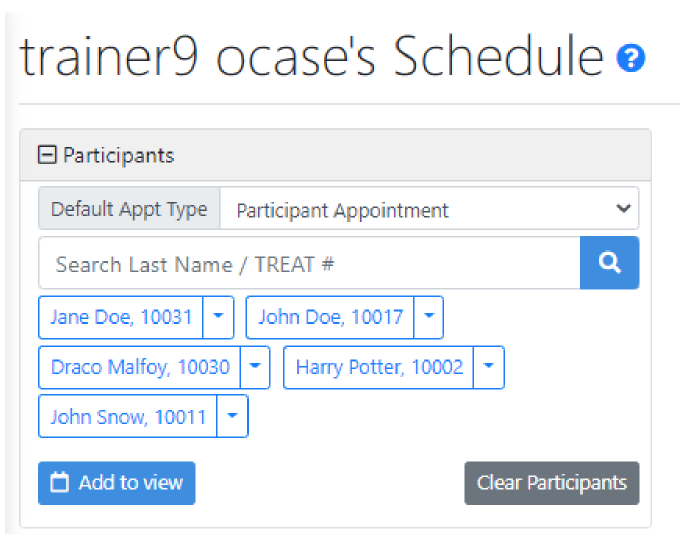
Steps to create a group appointment

1. Select the appropriate **Participant List** *(see Participant Lists to create a list for your program)*

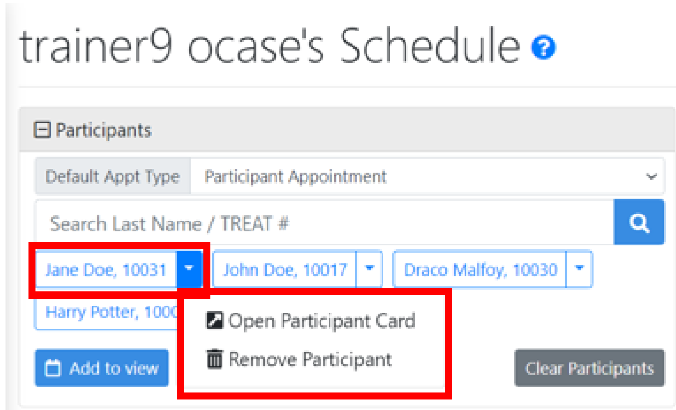
2. Select **Create Appointment** to create a group appointment within your schedule.



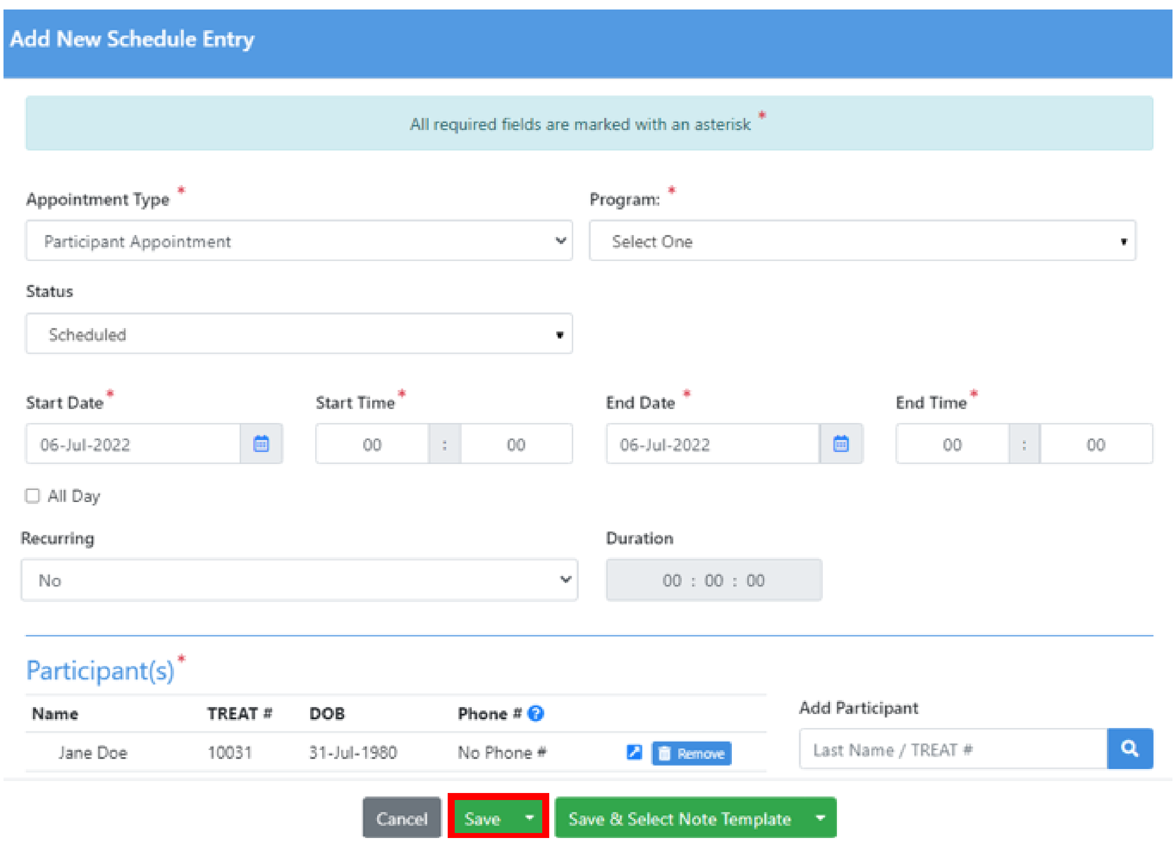
3. Once you have selected **Group Appointment**, the participants in your list will appear on the top of your Schedule screen.



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, including adding activities.



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

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.

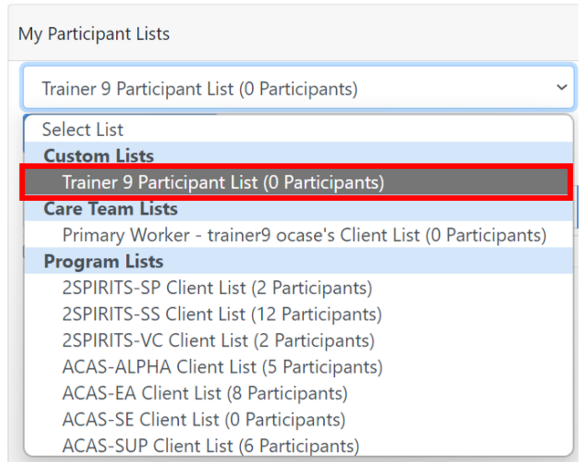
Group (Bulk) Notes

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.

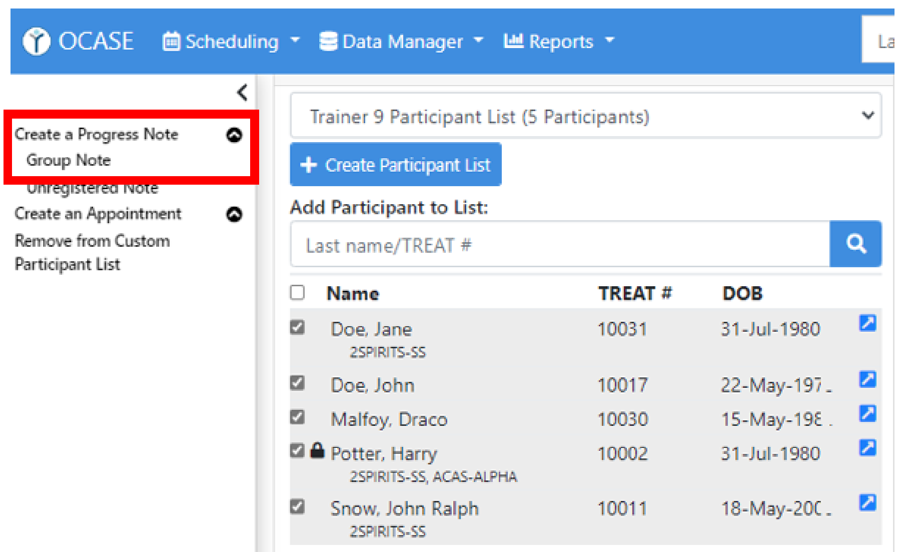
Steps to create a group (bulk) note

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

1. Navigate to the OCASE home screen
2. 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.**



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

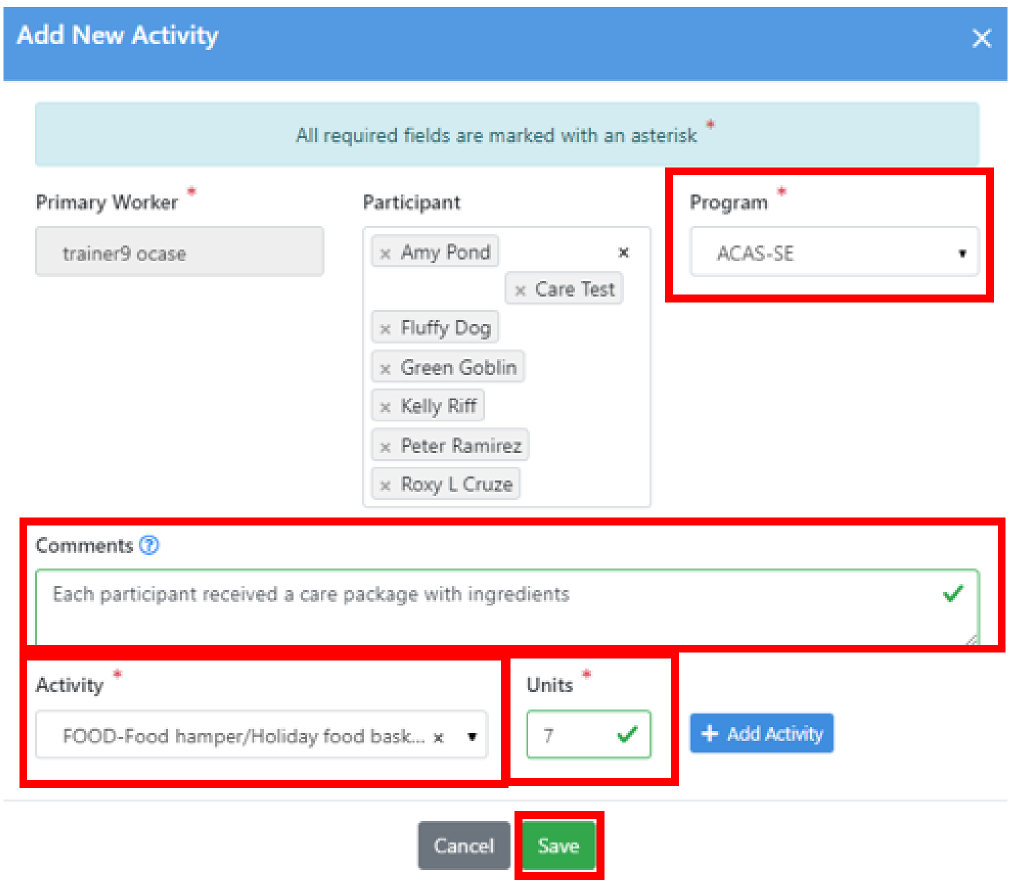
Once a you select **Sign Note**, the note can only be edited for **48 hours**

The **Group Note** option is for tracking program/project details, not for tracking individual participant details. Do not include any identifying information 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**

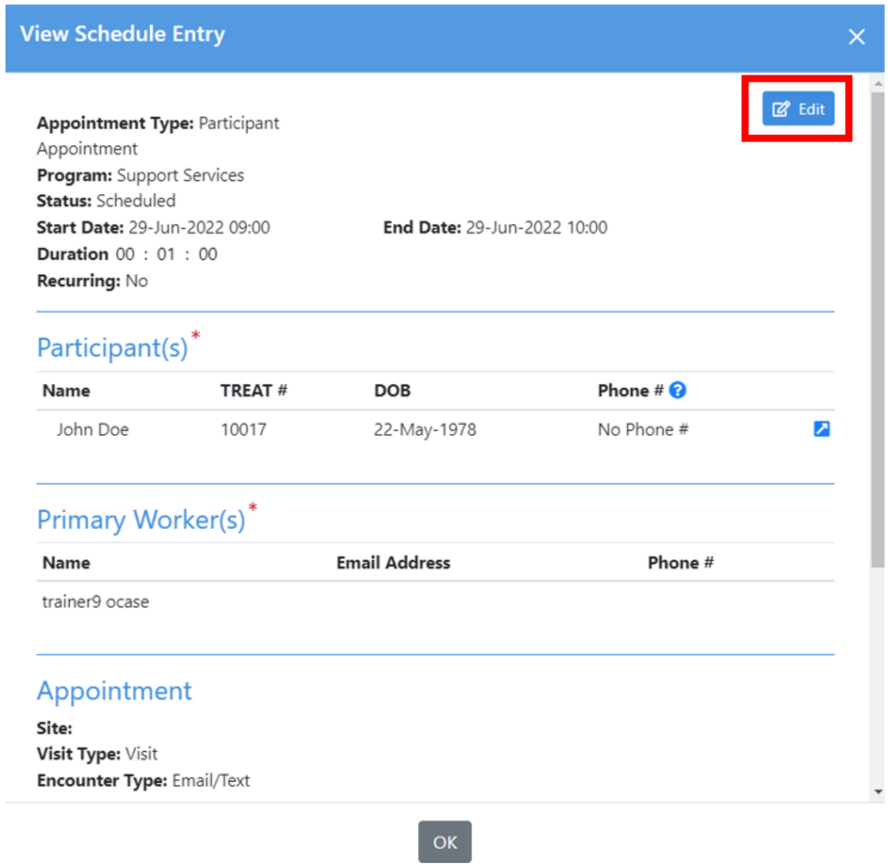


Manage Appointments

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 appointment within your calendar to view or edit
2. Select **Edit** to change any information
3. Select **Save**

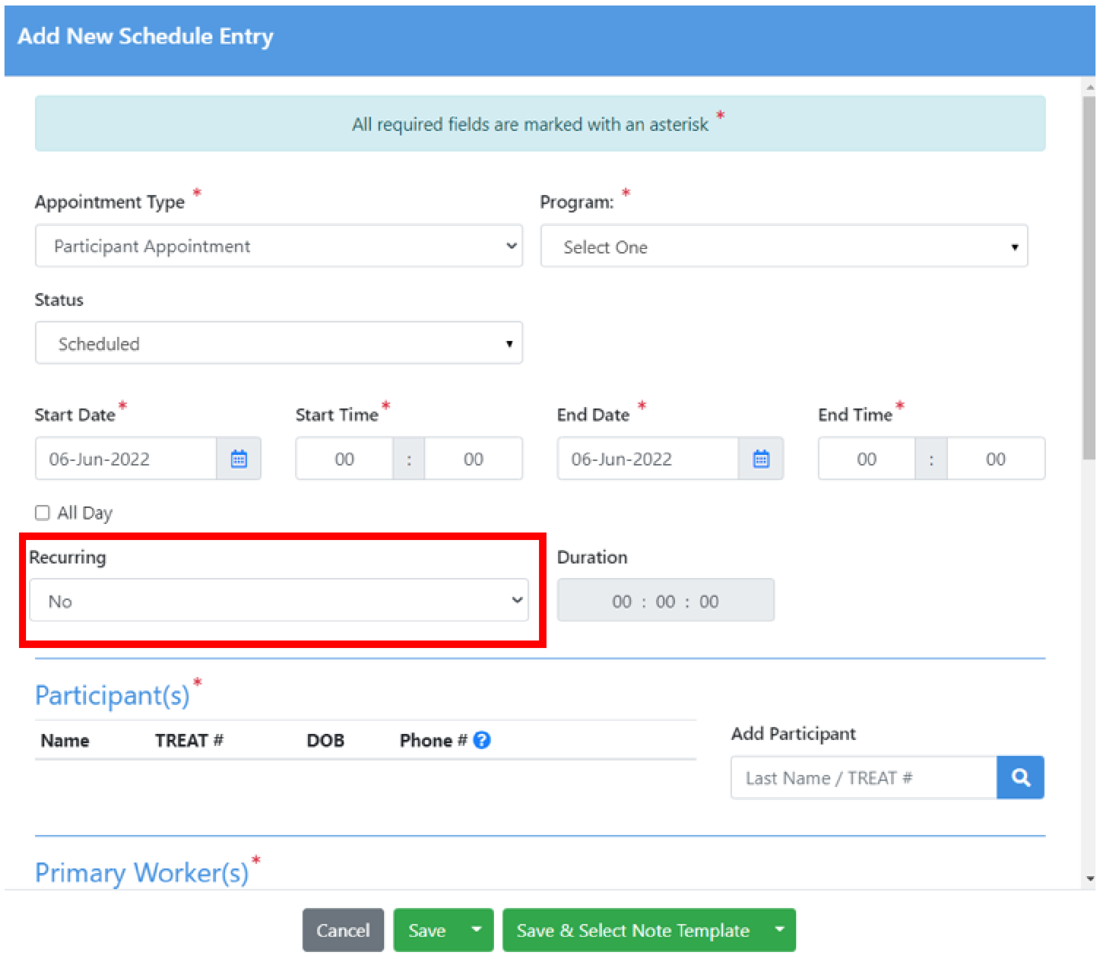


Recurring Appointments

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

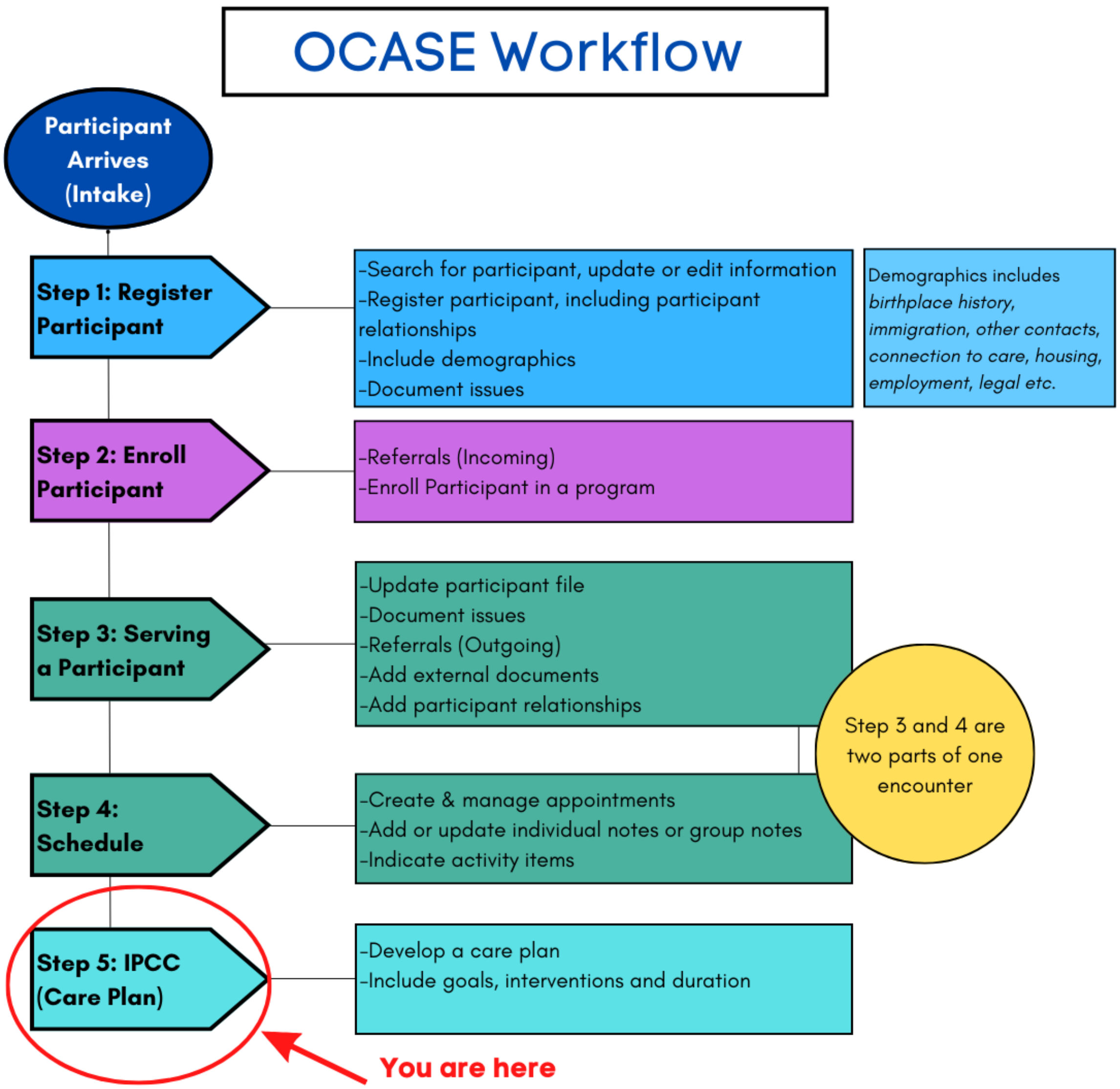
Steps to add recurring appointments

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**



IPCC- Create a Care Plan

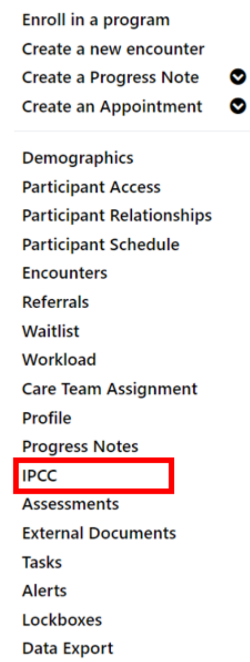
An **IPCC (Interdisciplinary Plan Client Care)** is a Care plan for each specific participant. IPCC documents a goal/issue/need for a participant, with visions, strengths and challenges for each goal. This is step 5 in the workflow, and used only when situations arise for participants that require a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



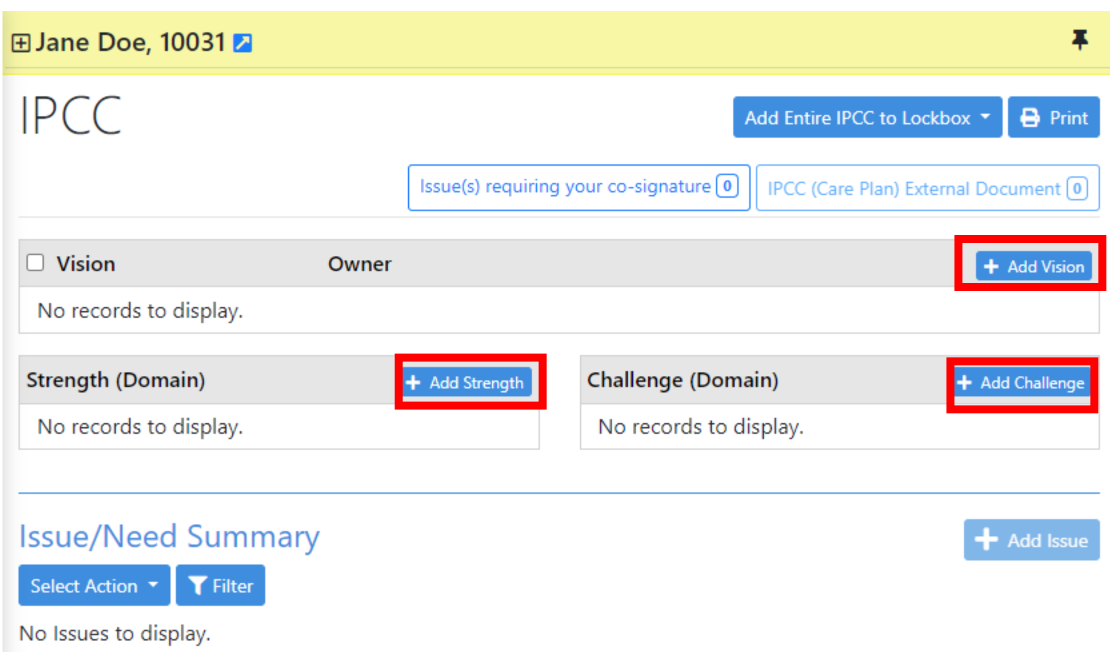
IPCC **Strengths, Challenges and Actions – Goals and Interventions** is a situational tool (with start and end dates) that can be used, but is not mandatory for every interaction with a participant.

Steps to create an IPCC

1. From the side Navigation Panel, select **IPCC**



2. Fill in the **mandatory fields* (Vision, Strength, Challenge)** that pertain to one specific goal.

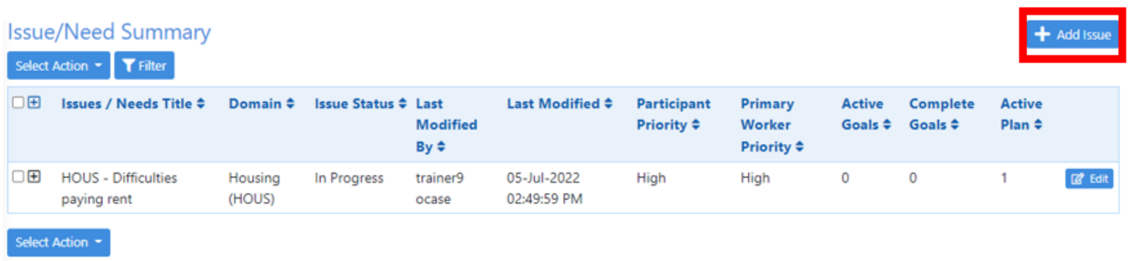


Issue/Need

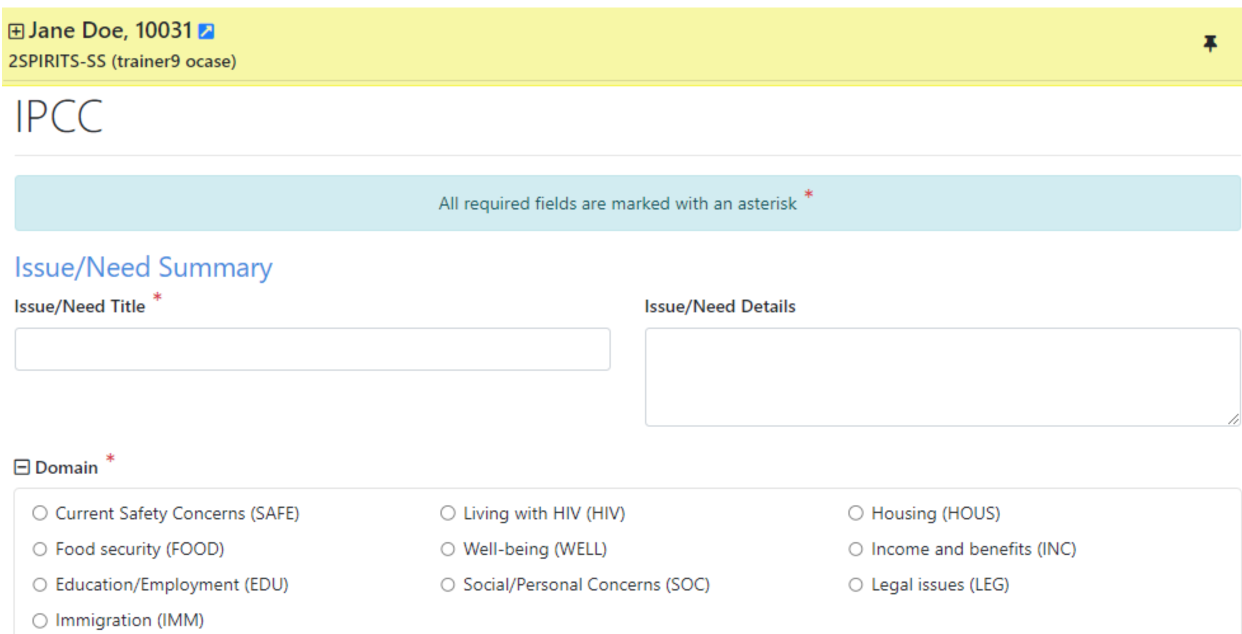
The issue/need section addresses circumstances that a participant is experiencing (e.g. housing challenges). These can be documented with a status as to how the circumstance is progressing.

Steps to add an issue/need

1. Select **Add Issue**

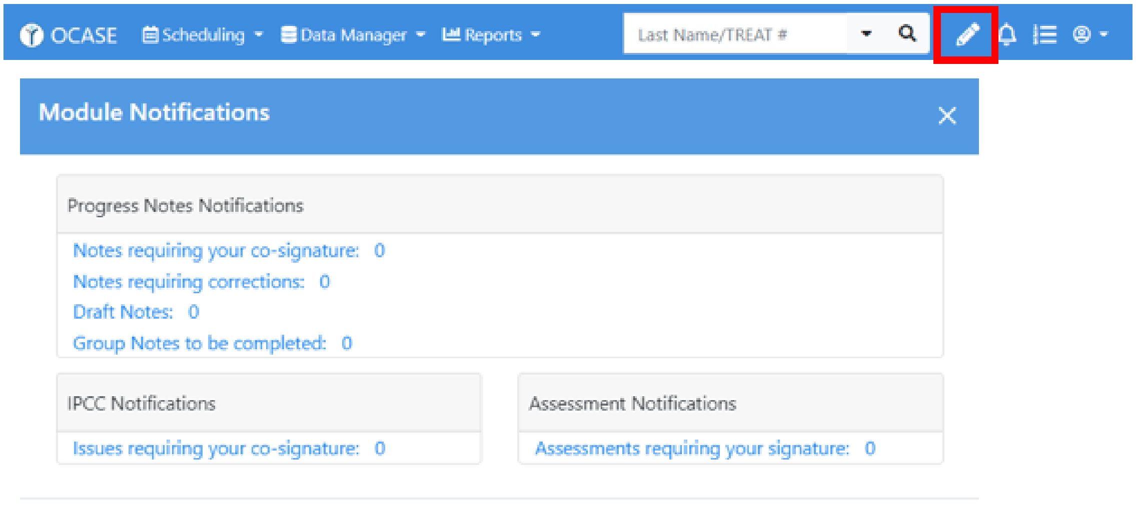


2. Fill in the **mandatory fields*.** Scroll to connect an **Issue** to specific *Encounters*, and previously registered *Strengths* and *Challenges*. Select **Save**.



Notifications

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

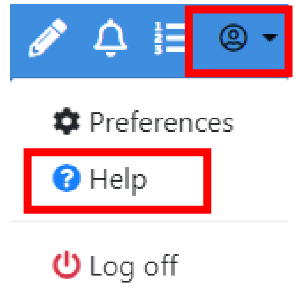


Resources

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**



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

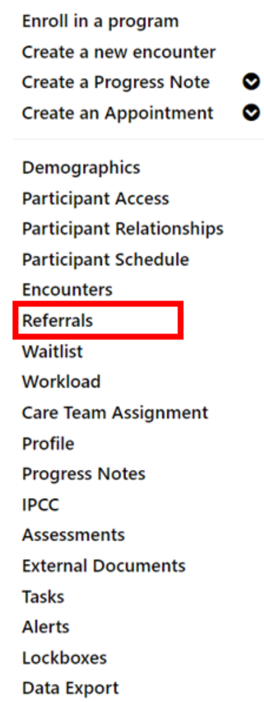
I. Program Waitlists

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

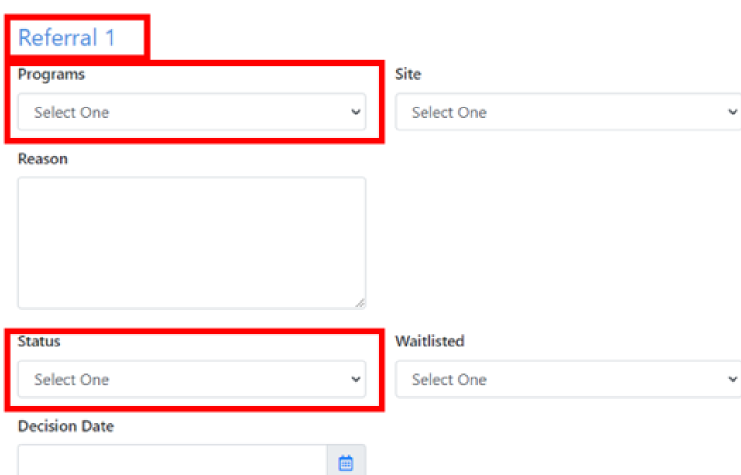
STEPS TO GENERATE A WAITLIST

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.



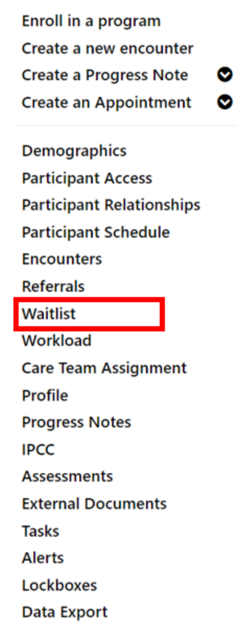
2. Select **Add Referral** and fill in the **mandatory fields***
3. Scroll to **Referral 1**
4. Select the Program the participant is being placed in and the **status when initiated.**
5. Leave **Waitlisted** and **Decisions Date** blank, when they are accepted to the program, they will be put on the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



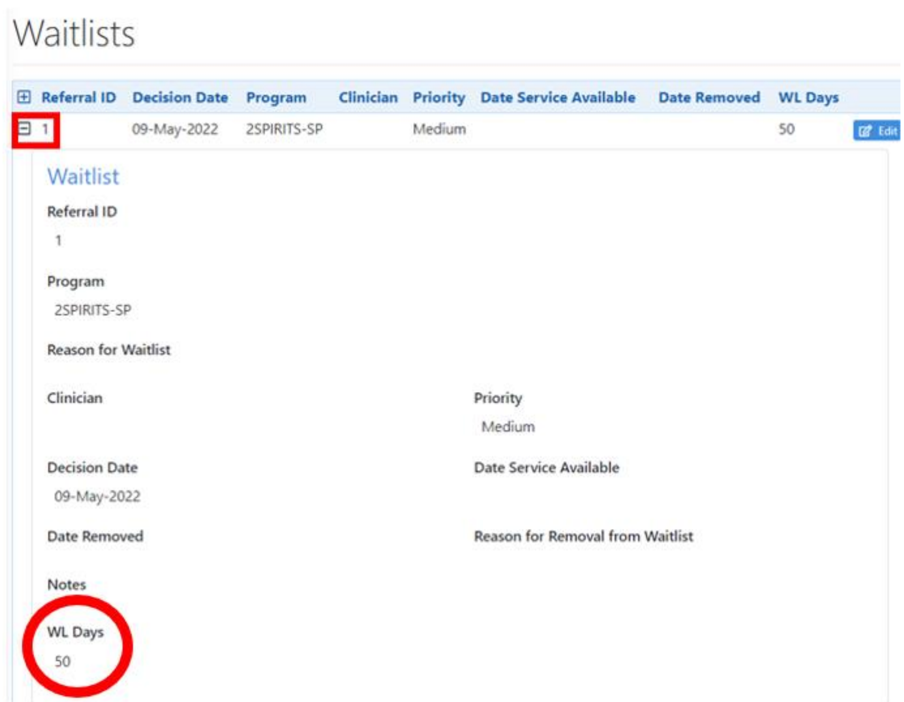
> The edit checks will guide you through the process. The decision date reflects the waitlist status, unless there is no waitlist, then the decision date reflects the status

STEPS TO VIEW A WAITLIST

1. Select **Waitlist** from the Navigation Pane



I. Select +/- to open Waitlist information.



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)	EDU/EMP - Capacity building
	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)	SOC/PER - Discrimination
	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)

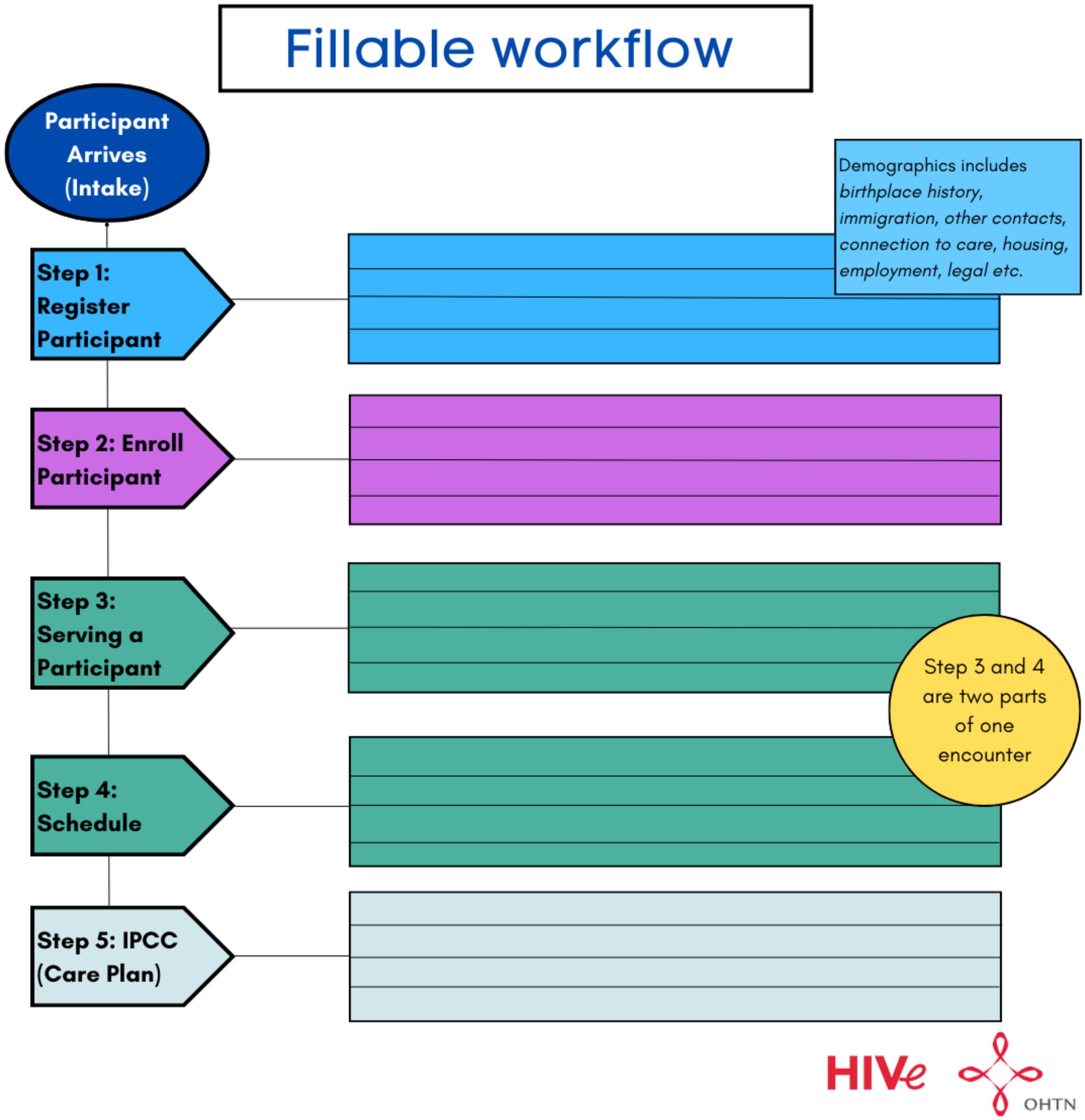
	FOOD-Family box
	FOOD-Food bank
	FOOD-Food hamper/Holiday food basket
	FOOD-Food voucher/Gift card
	FOOD-Groceries
Intake	INTAKE-Determine eligibility for agency services
	INTAKE-Engagement
	INTAKE-Orientation to the agency
	INTAKE-Preliminary assessment of priorities
	INTAKE-Program specific intake
	INTAKE-Set up client file
Practical Assistance	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)
External Referrals	REF-Addiction services
	REF-Clinical service providers (HIV care)
	REF-Clinical service providers (non-HIV specific)

	REF-Clothing bank
	REF-Community food bank
	REF-Community mental health agency
	REF-Community-based HIV service providers
	REF-Continuing education
	REF-Correctional institution
	REF-Counselling service
	REF-Day programs (seniors, brain injury)
	REF-Employment support
	REF-Faith-based organization
	REF-Harm reduction services
	REF-Health care facility/hospital
	REF-Health care professional (non-HIV)
	REF-Hep C testing/clinical care
	REF-HIV clinical care
	REF-HIV testing
	REF-HIV/STI testing
	REF-Household services
	REF-Housing provider
	REF-Legal aid/legal service agency
	REF-Mental health service providers
	REF-Naturopath
	REF-Online resources
	REF-Other AIDS service organization or HIV program
	REF-Other community-based service providers
	REF-Outreach
	REF-PEP/PrEP
	REF-Population-specific services (women's services, youth, Indigenous, etc.)
	REF-Public health
	REF-Service Navigation
	REF-Settlement agency
	REF-Smoking cessation program
	REF-Social services (incl EI, OW, ODSP)
	REF-STI testing/Sexual health clinic

V. Glossary of New terms

Historical Term (PENELOPE)	Current Term (TREAT)
Intake Wizard	Register Member
Individual Profile Profile tab, demographic	**Demographics**
Individual ID	OCASE ID
Relationship (on Case screen)	Client Group Task or Notification text (?): complete connection to care for PHA
Individual (client, community member, service user etc.)	Participant
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 Engagement-Baseline Information** c. Immigration Status	**Client Profile tab** a. Emergency Contact b. Contact c. Birthplace History
Additional Client Information a. HIV/Hepatitis C Status b. Accessibility Information c. Current medications	**Medical tab** a. Connection to Care b. Hospitalizations or ER Visits c. Medication and Allergies
Client Engagement **Housing Situation**	**Housing tab**
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** -Enroll in a program
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
Service/Cart Item	**Individual Note** Service Unit/Activity Item
Case Note (Session Note)	**Notes** a. Progress Note Individual Note
Groups a. Informal Series/Group List b. Informal Event/Group Event c. Roster (Expected or Registered Attendees)	**Groups** a. Program b. Group Activities c. Members (Participants)
Presenting Issues	**IPCC (Interdisciplinary Plan Client Care)**
a. External Referrals b. Agency Details	**Referrals (Outgoing) tab** a. Current issue b. Issue detail
Pre-enrollment	**Waitlist**


Fillable workflow
Participant Arrives (Intake)
Step 1: Register Participant
Demographics includes *birthplace history, immigration, other contacts, connection to care, housing, employment, legal etc.*
Step 2: Enroll Participant
Step 3: Serving a Participant
Step 3 and 4 are two parts of one encounter
Step 4: Schedule
Step 5: IPCC (Care Plan)
HIVe
OHTN

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

VIII. 24 Hour Clock Time Conversion

The OCASE TREAT system uses the 24 hour clock. Please see the below chart for converting time using the 24 hour clock.

12 Hour Clock	24 Hour Clock
1AM	01:00
2AM	02:00
3AM	03:00
4AM	04:00
5AM	05:00
6AM	06:00
7AM	07:00
8AM	08:00
9AM	09:00
10AM	10:00
11AM	11:00
12PM	12:00
1PM	13:00
2PM	14:00
3PM	15:00
4PM	16:00
5PM	17:00
6PM	18:00
7PM	19:00
8PM	20:00
9PM	21:00
10PM	22:00
11PM	23:00
12AM	24:00

IX. Lockboxes

Lockboxes restrict access to a participant's file, or specific information within the file. A partial Lockbox creates a 'safe' to put specific files for Locking. For example, if a former participant is now a staff member, this information can be put in a lockbox.

LOCKBOX POLICY

- A participant (client) has requested that their file be restricted (or partially restricted) to allow only one or two TREAT users
- A participant (client) has requested that their file be restricted (or partially restricted) from only one or more TREAT users
- A participant (client) has now been hired as a TREAT user
- A participant (client) has been interviewed as a potential TREAT user; they need to declare all conflicts of interest and their relationships to other participants (clients) need to be included in this declaration

- A TREAT user knows a particular participant – they may have been or still are neighbours or partners
- A TREAT user develops a new fellowship with an existing participant (client) – they need to declare this new conflict of interest
- A TREAT user is a participant at the same Agency (incl. when they no longer want to receive services for the same Agency)
- A TREAT user has left the agency as a staff member
- A Volunteer/Peer could also be a TREAT User
- If a TREAT user needs to be prevented from seeing a specific tab on any of the Profiles this can be set up by changing permissions. This is not possible to set up using the Lockbox feature

General Lockbox Permissions	**Comments**
Can manage all lockboxes	Specific positions or to have a centralized policy
Can always see data in lockbox without breaking lock	Specific positions or to have a centralized policy
Can break lockbox if denied access	If used, can be seen on audit report
Can manage own lockboxes	Default permission

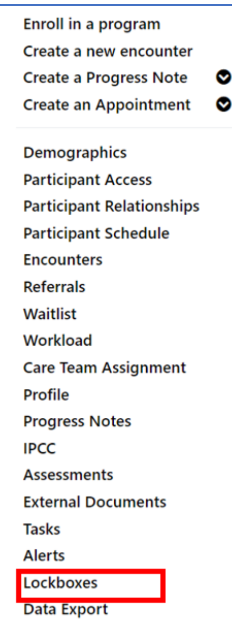
HOW TO MANAGE OR RESTRICT THE LOCKBOX FEATURE IN TREAT

- Select a specific TREAT user to "Can manage all lockboxes"
- Only allow specific TREAT users to "Can manage own lockboxes"
- Only allow one or two TREAT users or job/titles to "Can break lockbox if denied access"
- Establish your agency's policy, consider that Managers including Human Resources and Directors may need to be restricted from a Lockbox or the access permissions

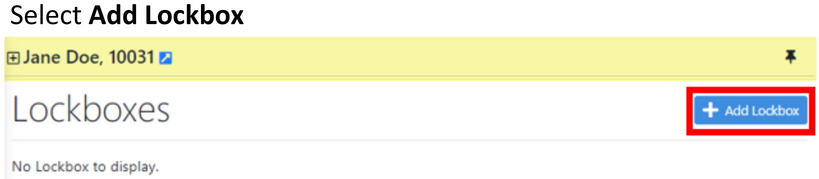
Depending on your agency's policy, contact ocase@ohtn.on.ca to make changes to permissions.

STEPS TO ADD A LOCKBOX

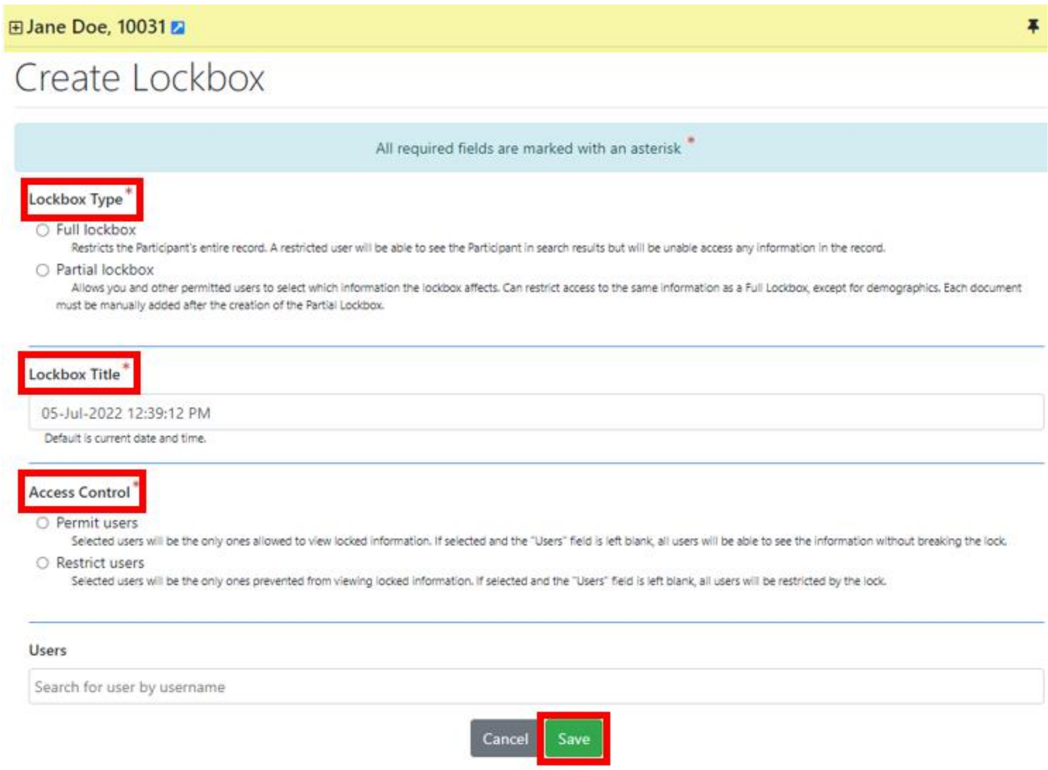
1. Select **Lockboxes** from the left side Navigation Panel



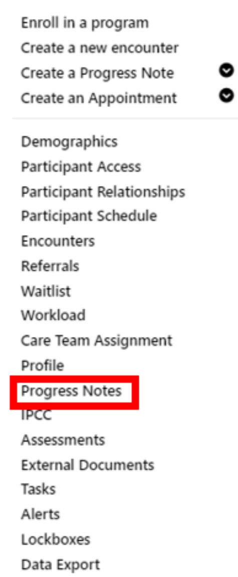
2. Select **Add Lockbox**



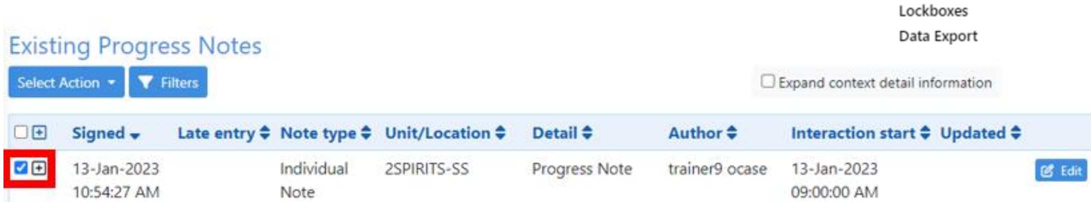
3. Determine the **Lockbox Type** (full or partial), input a **Lockbox Title** and determine **Access Control.** Search to add **Users** by their OCASE TREAT User ID Name, to restrict access to the Lockbox. Select **Save.**



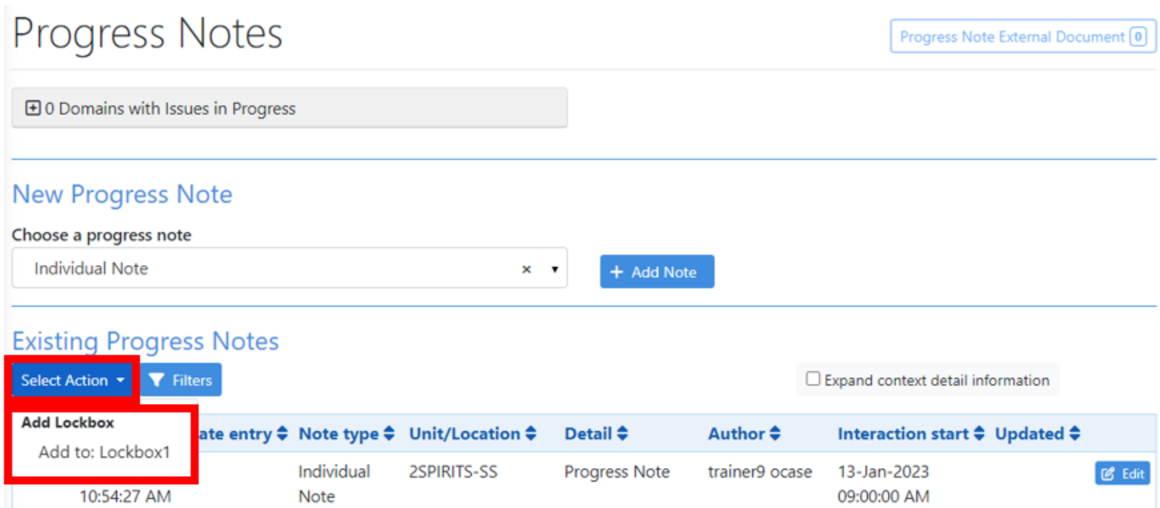
4. Add specific Progress notes to the new Lockbox by selecting **Progress Notes** from the left navigation panel.



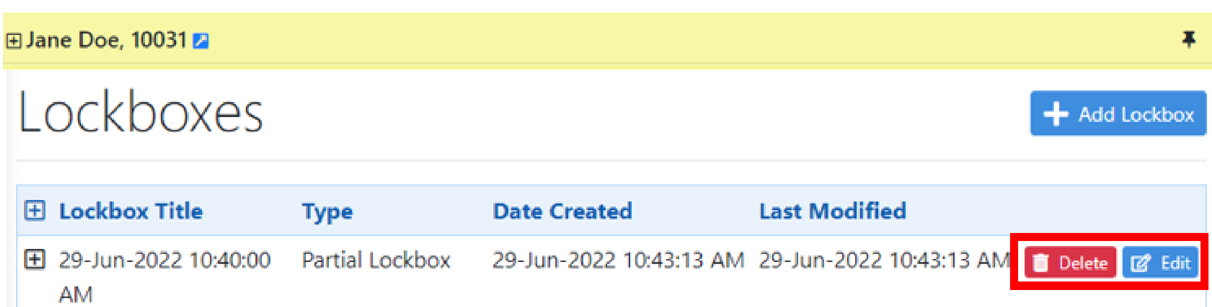
5. Select the desired Progress Note from the **Existing Progress Notes**:



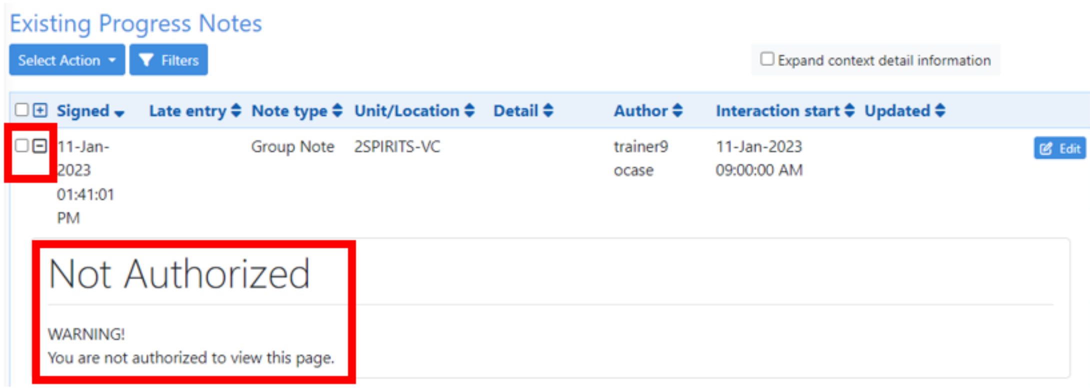
6. Under **Existing Progress Notes**, navigate to the **Select Action** drop down menu. Select the Lockbox you will add the Progress Note to:



7. **Edit or Delete** Lockbox at any time



8. When restricted users attempt to view notes that have been added to the Partial Lockbox will be displayed as **Not Authorized:**

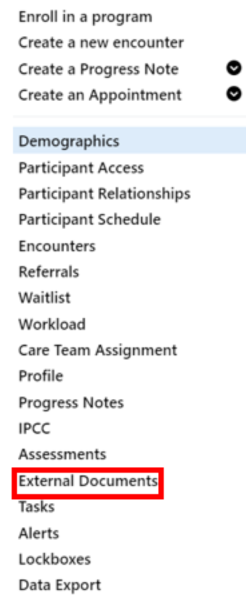


Lockboxes are useful when there is a possible conflict of interest, i.e. if a participant becomes a staff member.

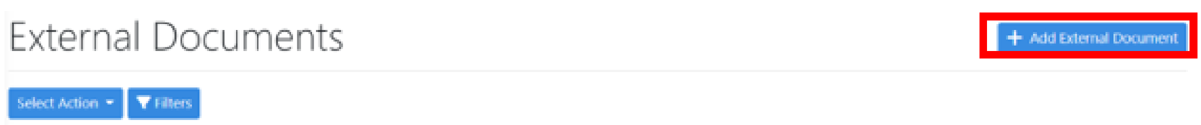
X. Restrict External Document Access

To restrict access to a confidential document follow these steps:

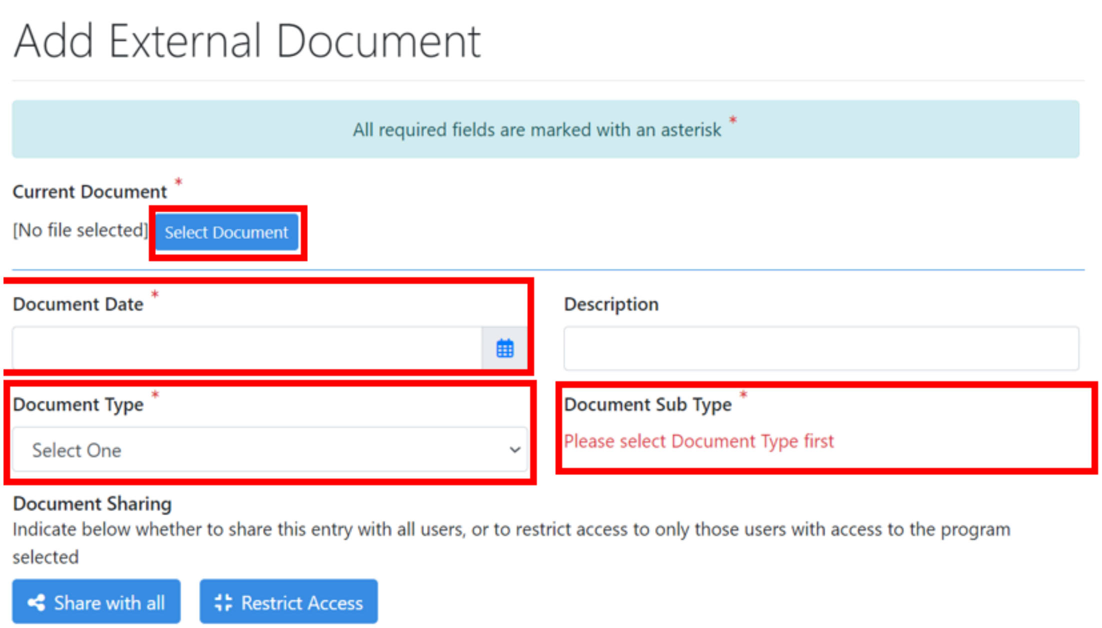
1. **Select External Documents** from the left navigation panel:



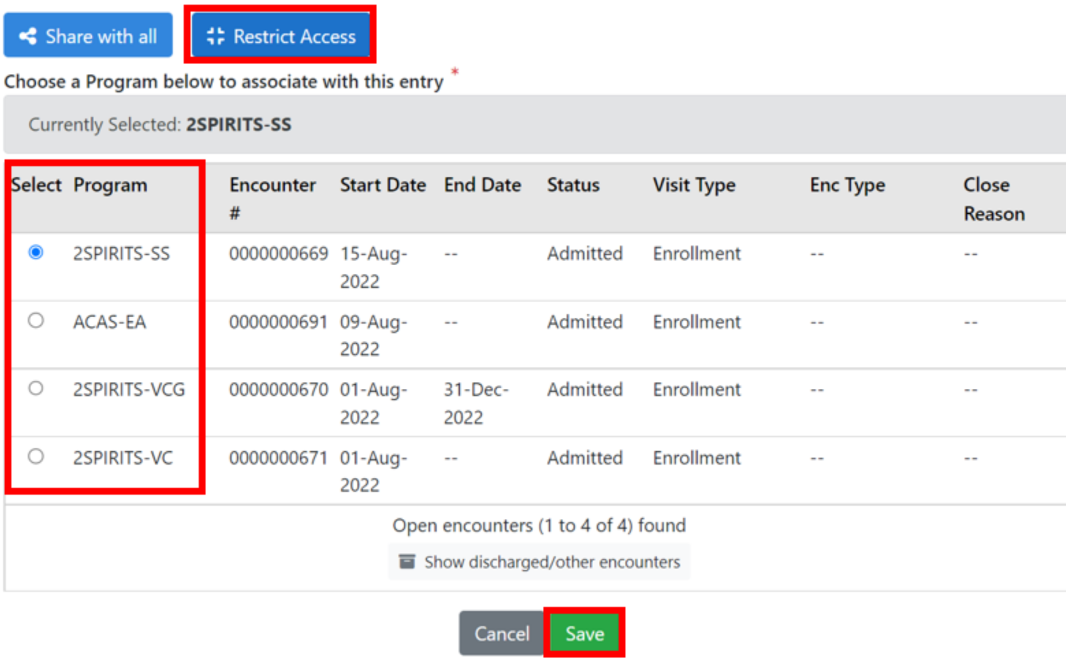
2. Select **Add External Document**



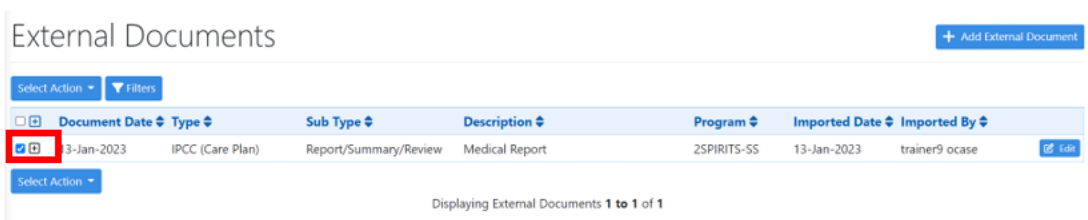
3. **Select the document you wish to upload** from your saved files, then input the **Document Date**, **Document Type** and **Document Sub Type**.



4. Select **Restrict Access**, and **select the program** to associate the Document with before selecting **Save.**



5. Once the document is saved, **select the document** from the External Documents list:



6. Using the **Select Action** drop down menu, **select the Lockbox** to add the document to: