

OCASE TREAT User Guide



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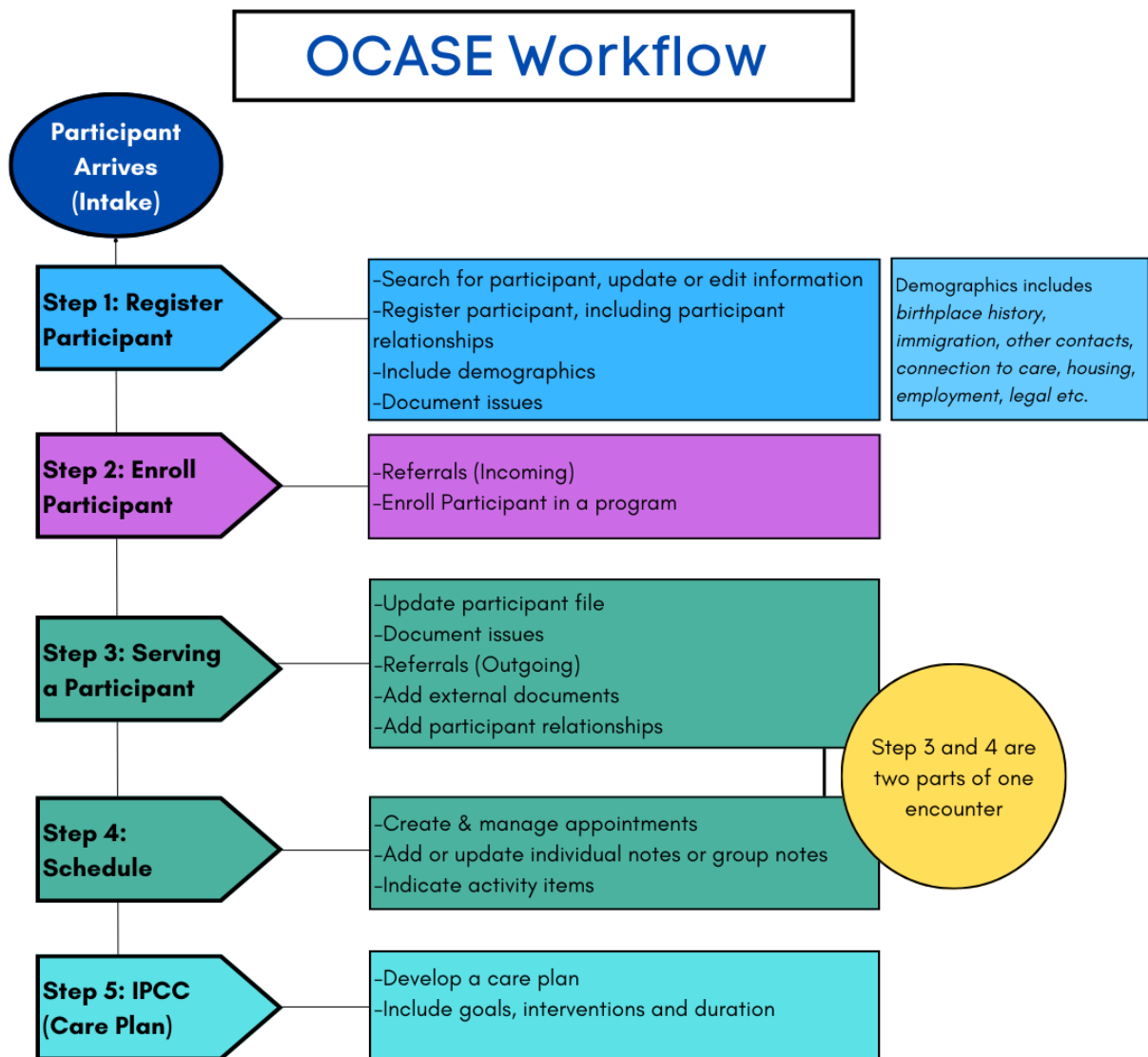
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OCASE User Guide

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

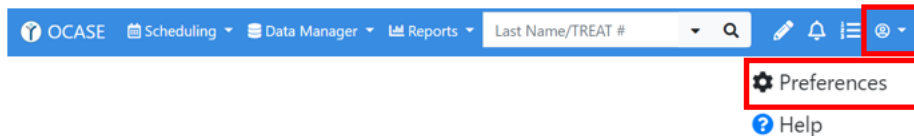
The screenshot shows a login interface. At the top, there is a text input field containing 'ocase', which is highlighted with a red box. Below it are two more text input fields: 'User ID' and 'Password', both also highlighted with red boxes. To the right of the 'Password' field is a 'Forgot password?' link. Below these fields is a blue 'Log On' button. At the bottom of the page, the text 'TREAT Version 5.17.0' is visible.

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.

Account Management

The screenshot shows the 'Account Management' page. It has a 'User Information' section with fields for 'First Name' (trainer9), 'Last Name' (ocase), and 'Primary Position'. Below this is a 'Change Password' section. The 'Change Password' section has three input fields: 'New Password', 'Repeat Password', and 'Confirm Password'. The 'Confirm Password' field has a sub-label 'Enter your old password to submit changes'. A note below the fields states 'All required fields are marked with an asterisk *'. At the bottom right of the form are 'Cancel' and 'Save' buttons. The 'Change Password' section and the 'Save' button are highlighted with red boxes.

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

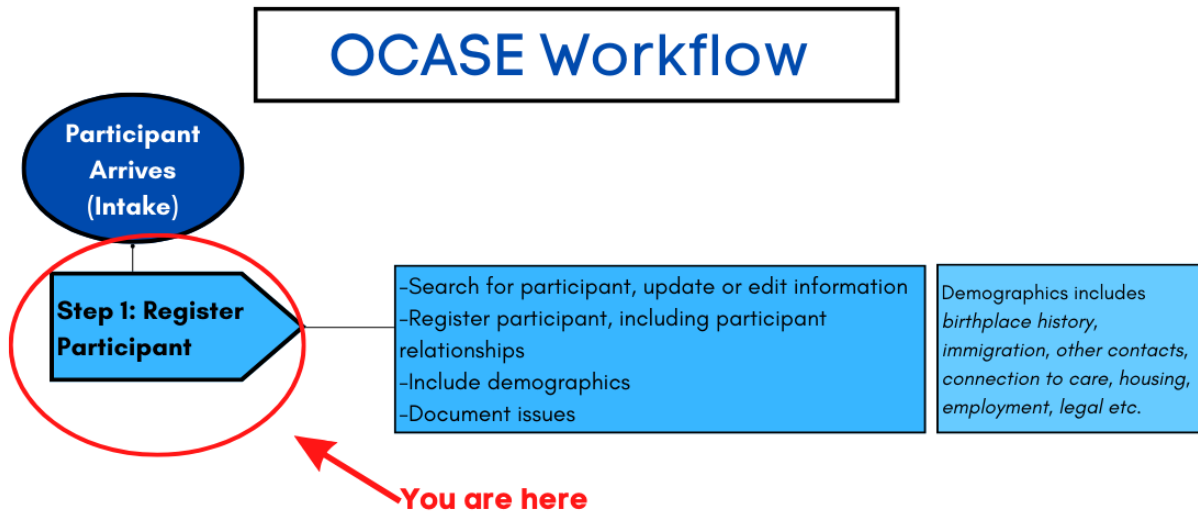
In this section, you will:

- 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 in 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 Soundex

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 demographic fields to create the new client:

First Name* Middle Name Last Name*

Consent to track data in OCASE* Preferred Name or Alias

TREAT ID OCASE ID Type

Sex/Gender* If Sex/Gender not listed, please complete

Mandatory Questions*

First Name is a mandatory question.

Last Name is a mandatory question.

Sex/Gender is a mandatory question.

Edit Checks

Cancel Save

Participant File

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

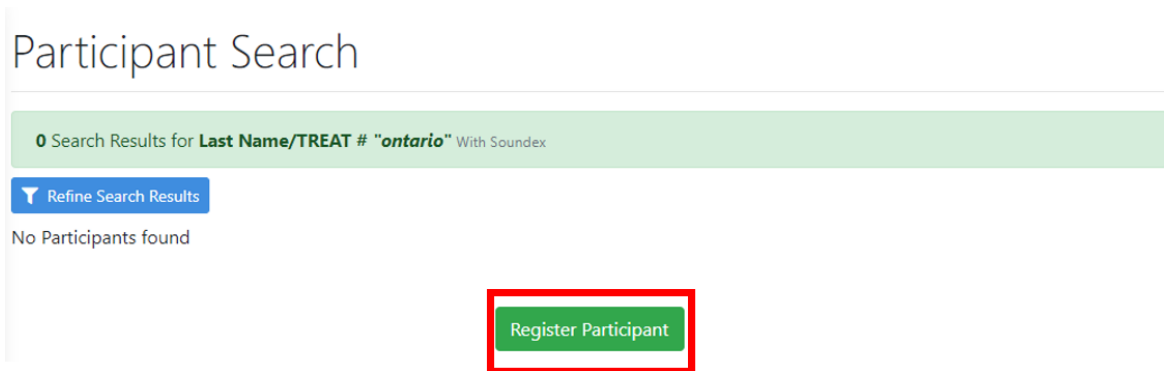
Steps to enroll a participant to the OCASE System

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

OCASE Scheduling Data Manager Reports

Last Name/TREAT #

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



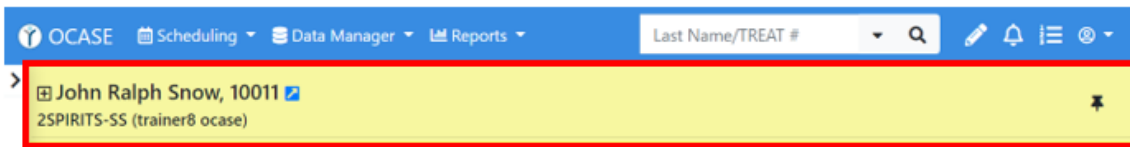
2. Enter the **last name** of the participant.

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:

- 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.

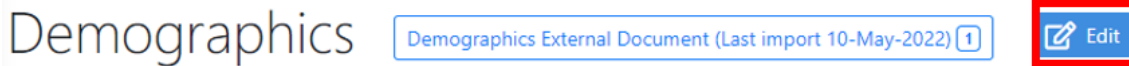


Edit Participant Information

- Search the participant in the system, and ensure the participant file is in context.
- 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
- 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
- External Documents
- Tasks
- Alerts
- Lockboxes
- Data Export

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.

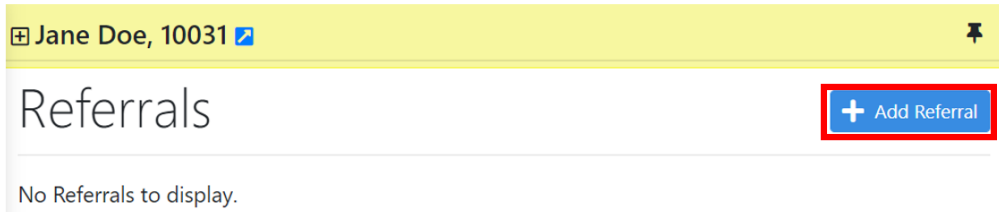
Steps to add referrals (incoming)

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

- 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
- External Documents
- Tasks
- Alerts
- Lockboxes
- Data Export

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:

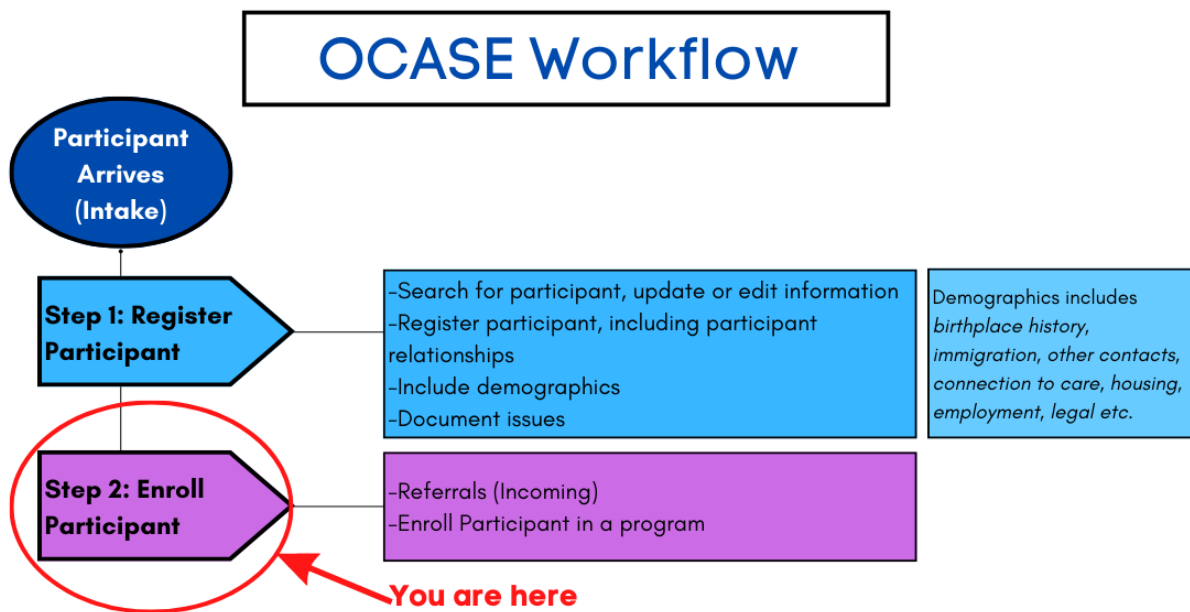
- Input incoming referrals, and enroll a participant in a program.

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**

- 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
- External Documents
- Tasks
- Alerts
- Lockboxes
- Data Export

Program Enrollment Information

All required fields are marked with an asterisk *

Client	TREAT #	Encounter #
Harry Potter	10002	

Start Date *	Visit Type *
<input type="text"/>	Enrollment

Program *	Site	Primary Worker *
Select One	Select One	

Referral
No Referral selected.
[Select Referral](#)

Mandatory Questions *

- Start Date is a mandatory question.
- Program is a mandatory question.
- Primary Worker is a mandatory question.

Edit Checks

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.

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.

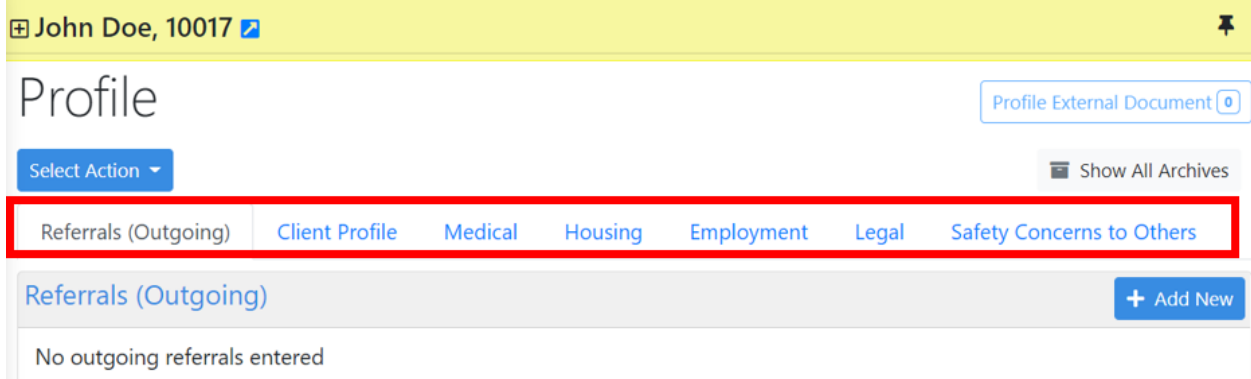
Steps to add demographics

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

- 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
- External Documents
- Tasks
- Alerts
- Lockboxes
- Data Export


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.




John Doe, 10017

Profile

Profile External Document 

Select Action 

Show All Archives 

Referrals (Outgoing) Client Profile Medical Housing Employment Legal Safety Concerns to Others

Referrals (Outgoing)

+ Add New

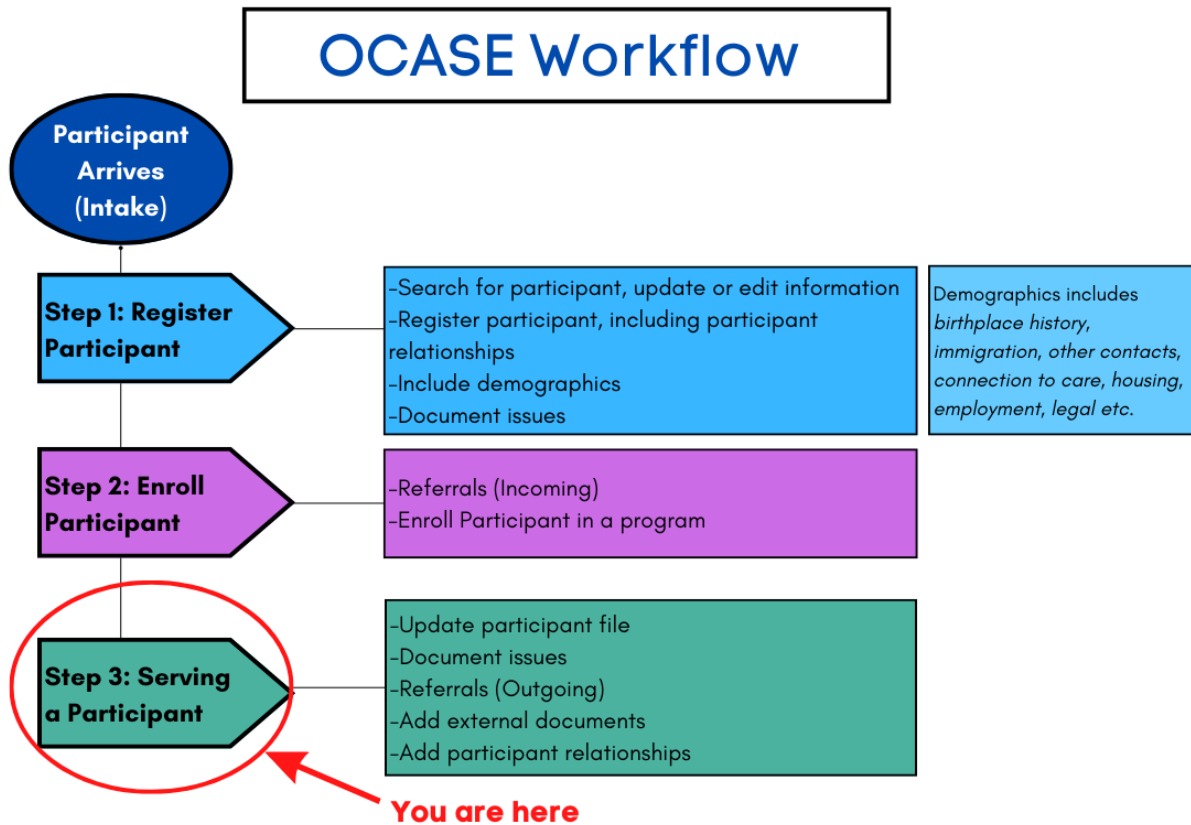
No outgoing referrals entered

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.

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

- 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
- External Documents
- Tasks
- Alerts
- Lockboxes
- Data Export

2. Select **Add Issue**

John Ralph Snow, 10011
2SPIRITS-SS (trainer8 ocase)

IPCC

Add Entire IPCC to Lockbox Print

Issue(s) requiring your co-signature IPCC (Care Plan) External Document

Vision Owner + Add Vision

No records to display.

Strength (Domain) + Add Strength

No records to display.



Challenge (Domain) + Add Challenge

Doesn't speak English (HOUS) Edit History

Issue/Need Summary

Select Action Filter + 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.

John Ralph Snow, 10011  

2SPIRITS-SS (trainer8 ocase)

IPCC

All required fields are marked with an asterisk *

Issue/Need Summary

Issue/Need Title *

hiv

- HIV - Connection to HIV care
- HIV - Disclosure
- HIV - Stigma/Discrimination
- HIV - POZ prevention/baby formula
- WELL - Risk for HIV, Hep C & STI
- Immigration (IMM)

Issue/Need Details

HIV) Housing (HOUS)

L) Income and benefits (INC)

Concerns (SOC) Legal issues (LEG)

4. Select a **Domain**

Domain *

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

- Select an **Encounter** that the issue is associated with

Encounter *

Select	Program	Encounter #	Start Date	End Date	Status	Visit Type	Enc Type	Close Reason
<input type="radio"/>	2SPIRITS-SS	0000000018	09-May-2022	--	Admitted	Enrollment	--	--

Open encounters (1 to 1 of 1) found

Show discharged/other encounters

- 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)

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

- 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
- External Documents
- Tasks
- Alerts
- Lockboxes
- Data Export

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

The screenshot shows the 'Profile' page for Jane Doe, 10031. The 'Referrals (Outgoing)' tab is selected and highlighted with a red box. Below the tabs, the 'Referrals (Outgoing)' section is visible, with a '+ Add New' button highlighted with a red box. The text 'No outgoing referrals entered' is displayed below the button.

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

The screenshot shows the 'Add Referrals (Outgoing) Entry' form. A blue header bar contains the title and a close button. Below the header, a light blue bar states 'All required fields are marked with an asterisk *'. The form contains several fields: 'Current Issue Category*' (dropdown), 'Issue Detail*' (dropdown), 'Referral Agency Name' (text), 'Status*' (dropdown), 'Follow-up Date' (calendar), 'Date*' (calendar), 'Referral Agency Type*' (dropdown), 'Referral Agency Address' (text), 'Referral Agency Contact Name/Details' (text), 'Consent Provided*' (dropdown), and 'Notes' (text). The 'Current Issue Category*', 'Issue Detail*', 'Status*', 'Date*', and 'Referral Agency Type*' fields are highlighted with red boxes. At the bottom, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted with a red box.

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

Written consent can be attached using the **External Documents** Feature

- 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) + Add New

Current Issue Category	Issue Detail	Referral Agency Name	Status	Follow-up Date	Last Modified Date	Last Modified User	
Living with HIV	HIV - Access to medications	Sunnybrook Health Sciences- Anita Rachlis Outpatient Clinic	Issue identified	22-Jul-2022	15-Jul-2022	trainer9 ocase	✎ Edit 🕒 History

Edit Referrals (Outgoing) Entry ✕

Current Issue Category* Housing	Issue Detail* HOUS - Difficulties pa... x	Referral Agency Name Fred Victor	Status* Issue identified
Follow-up Date [Calendar Icon]	Date* 05-Jul-2022 [Calendar Icon]	Referral Agency Type* COMM-Housing provi... x	Referral Agency Address [Text Area]
Consent Provided* Verbal (in person)	Notes [Text Area]	Referral Agency Contact Name/Details [Text Area]	

Cancel
Archive
Save

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

Profile

Profile External Document

Select Action ▾ **Show All Archives**

Referrals (Outgoing) Client Profile Medical Housing Employment Legal Safety Concerns to Others

Referrals (Outgoing) [+ Add New](#)

No outgoing referrals entered

Xander Cage, 10008

2SPIRITS-VC (trainer12 ocase), ACAS-SUP (trainer4 ocase)

Profile

Profile External Document

Select Action ▾ **Hide All Archives**

Referrals (Outgoing) Client Profile Medical Housing Employment Legal

Safety Concerns to Others

Referrals (Outgoing) [+ Add New](#)

Current Issue Category	Issue Detail	Referral Agency Name	Status	Follow-up Date	Last Modified Date	Last Modified User	
Food security	FOOD - Difficulty accessing food stores	Food Bank - Brampton	Issue identified	28-Jul-2022	14-Jul-2022	trainer4 ocase	Edit History

Date 14-Jul-2022	Referral Agency Type COMM-Community food bank	Referral Agency Address --	Referral Agency Contact Name/Details --
Consent Provided Verbal (tele)	Notes Has been sick for some time.		



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

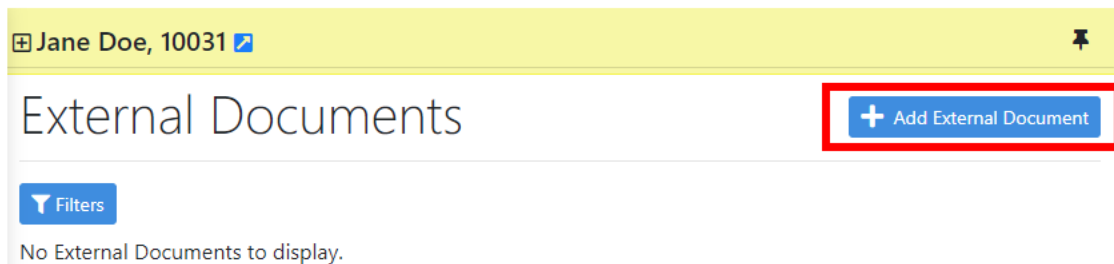
Steps to attach external documents


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
- Assessments
- External Documents**
- Tasks
- Alerts
- Lockboxes
- Data Export


2. Select **Add External Document**



Jane Doe, 10031 

External Documents

 Add External Document


 Filters

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 *
Please select Document Type first

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](#)

Select Action **Filters**

External Document Type *
All
Assessments
Demographics
IPCC (Care Plan)
Profile
Progress Note

External Document Sub Type
× Bed Bug Protocol ×
× Consent form
× Health Card/Driver's License
× OCAN Consent form
× Referral Document × RTA

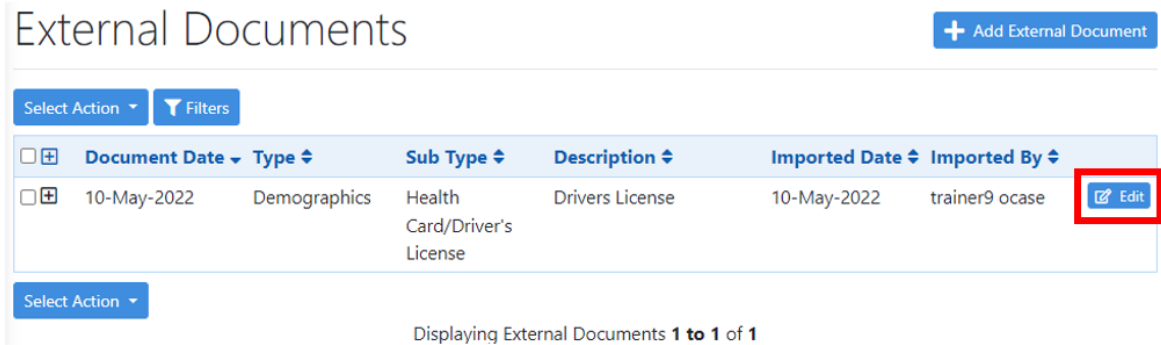
Apply Filters

Edit External Documents

There is an option edit and update existing external documents.

Steps to edit external documents

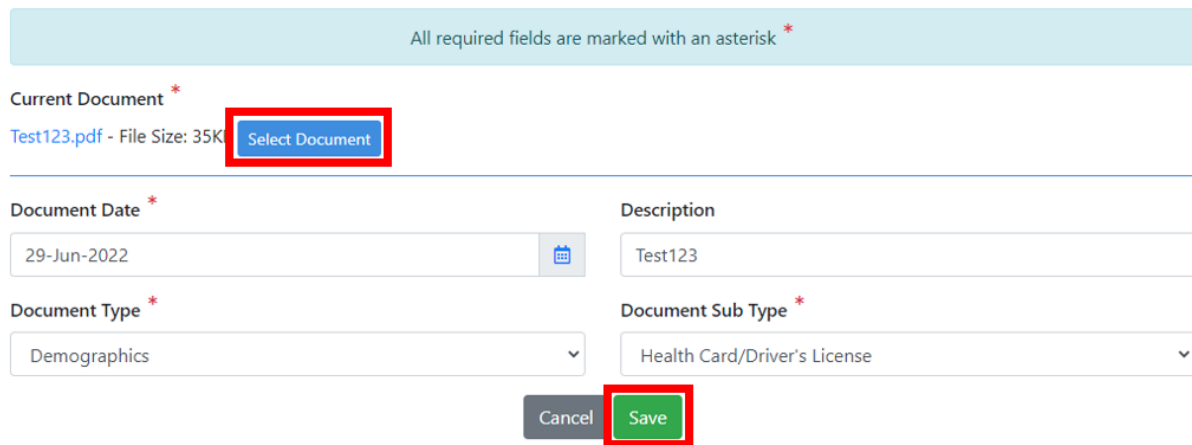
1. Select the document, then select the **Edit** button



The screenshot shows the 'External Documents' interface. At the top right is a '+ Add External Document' button. Below the title are 'Select Action' and 'Filters' buttons. A table lists documents with columns: Document Date, Type, Sub Type, Description, Imported Date, and Imported By. The first row shows a document from 10-May-2022, Type: Demographics, Sub Type: Health Card/Driver's License, Description: Drivers License, Imported Date: 10-May-2022, and Imported By: trainer9 ocasa. The 'Edit' button in the rightmost column of this row is highlighted with a red box. Below the table is another 'Select Action' button and a status message: 'Displaying External Documents 1 to 1 of 1'.

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



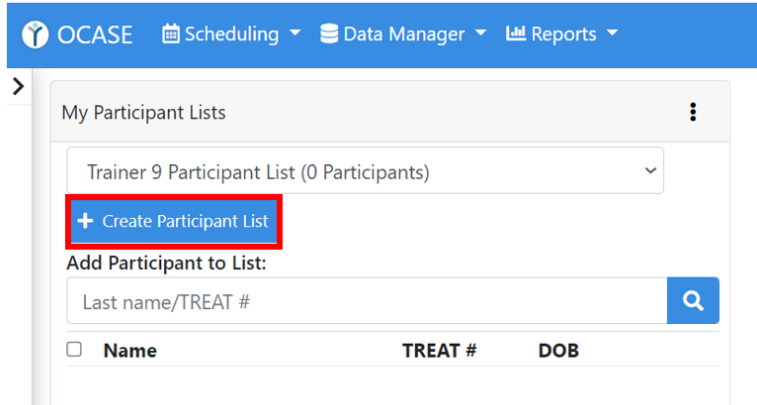
The screenshot shows the 'Edit External Document' form. At the top, a light blue banner states 'All required fields are marked with an asterisk *'. Below this, the 'Current Document' section shows 'Test123.pdf - File Size: 35K' and a 'Select Document' button highlighted with a red box. The form has two columns of fields. The left column contains 'Document Date *' (with a date picker set to 29-Jun-2022) and 'Document Type *' (a dropdown menu set to Demographics). The right column contains 'Description' (with the text Test123) and 'Document Sub Type *' (a dropdown menu set to Health Card/Driver's License). At the bottom, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted with a red box.

Participant List

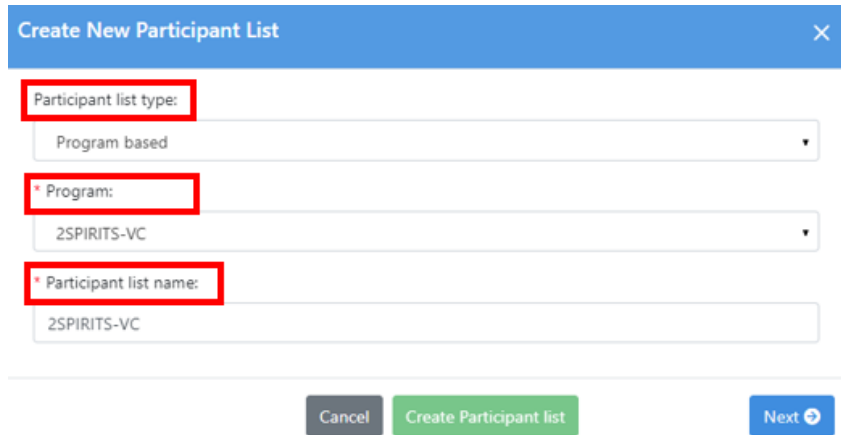
A participant list is a way to keep program lists organized within the OCASE System. For example, you can create a list for your weekly Youth Program, which includes the participants who are enrolled in that specific program. Once you have created this list, you can add bulk/group notes to keep track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

Steps to create a participant list

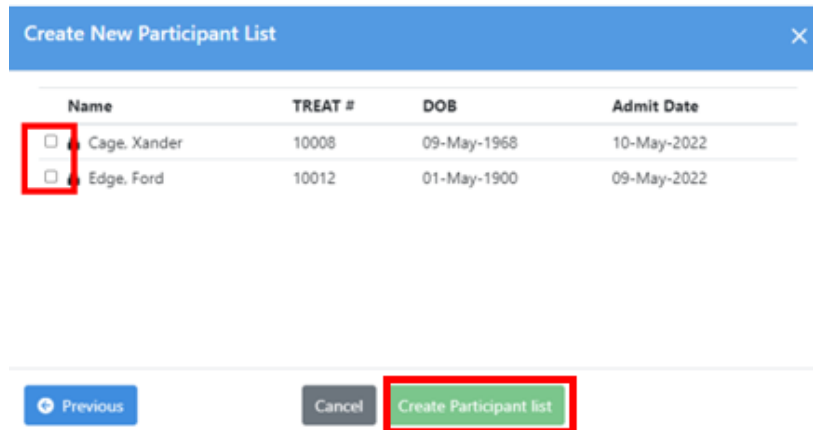
1. Navigate to the OCASE home screen
2. Select **Create Participant List** and fill in the name of the list (i.e. Youth Cooking Class)



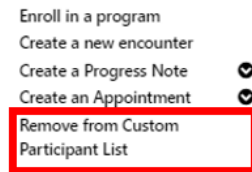
3. Select Participant List Type (Custom or Program Based), Program, and Participant List Name (this is fillable)



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:

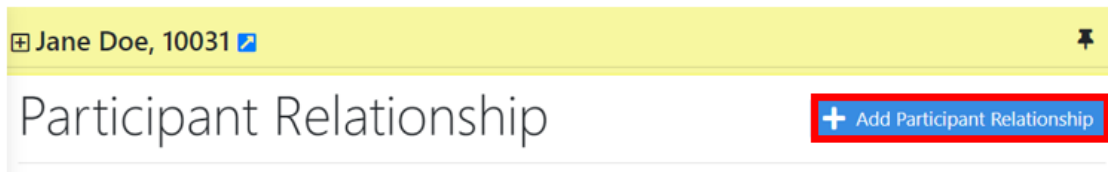
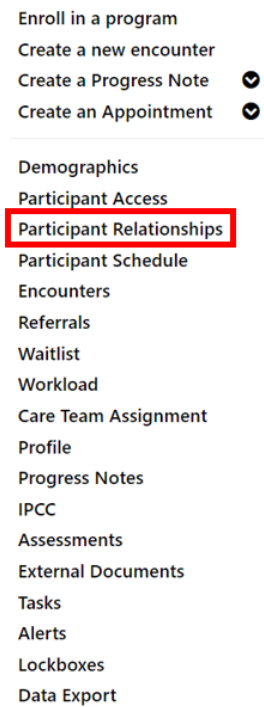


Participant Relationships



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

⊕ Jane Doe, 10031  

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).

Search Results

0 Search Results for Last Name/TREAT # "Ontario" With Soundex

No Participants found

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

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

John Doe, 10017

Add Participant Relationship

All required fields are marked with an asterisk *

Relationship John (10017) to Jane (10031)

What is John Doe's relationship to Jane? *

Select One

Comments

Relationship Jane (10031) to John (10017)

What is Jane Doe's relationship to John? *

Select One

Comments

Cancel Save

Navigate Between Related Participants

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

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

Jane Doe, 10031

Participant Relationship

+ Add Participant Relationship

Name	TREAT #	Relationship	Comment
John Doe Go to Demographics	10017	Father	-- Edit

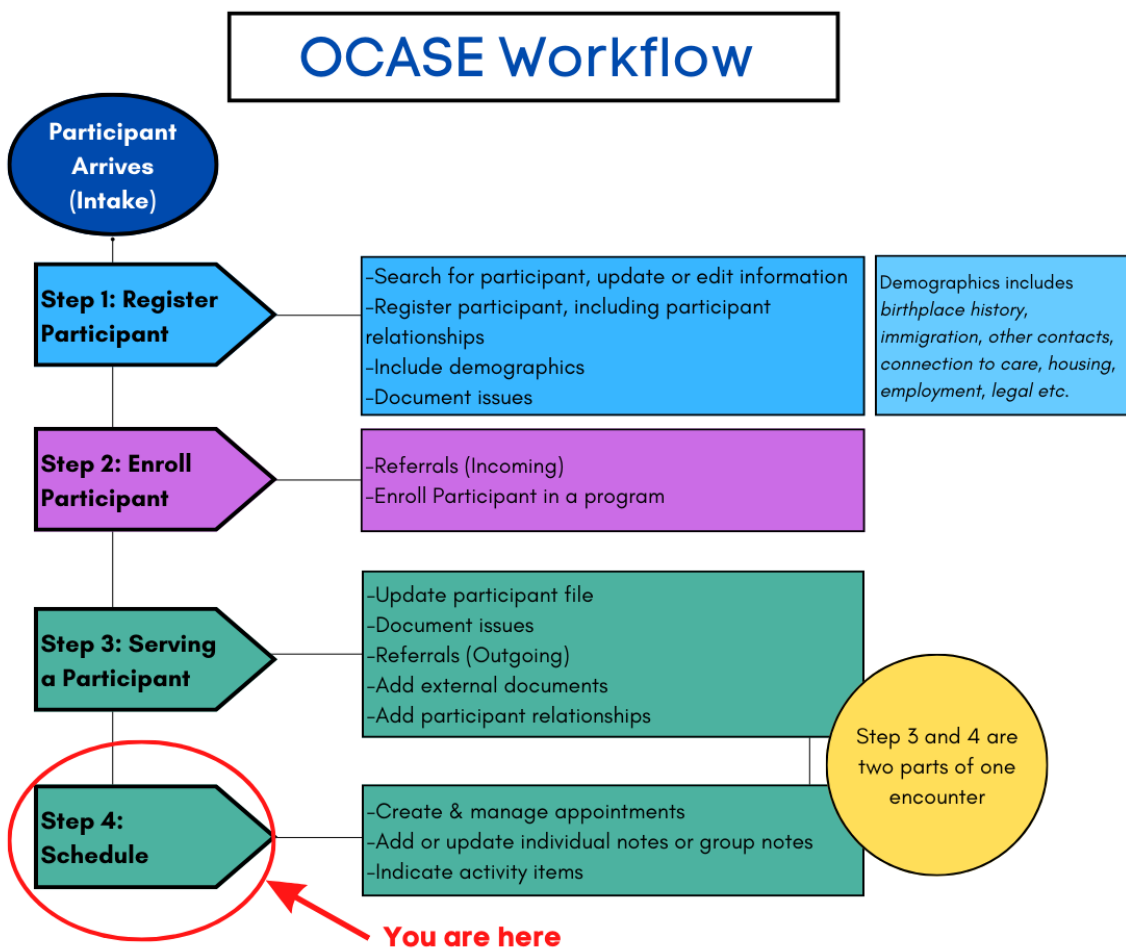
Schedule

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:

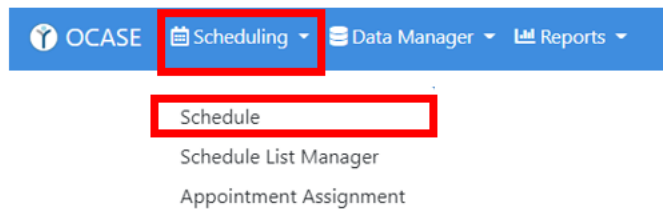
- Review the OCASE Training video [Schedule-Add Appointments](#)
- Review the OCASE Training video [Add Individual Note](#)
- Review the OCASE Training video [Add an Activity](#)

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

Add New Schedule Entry

All required fields are marked with an asterisk *

Appointment Type *
Participant Appointment

Status
Scheduled

Start Date *
12-Jul-2022

Start Time *
03 : 00

All Day

Program: *
Select One

Select One

ALHPA Group

Expressive Art

Social Events

Student Placement

Support

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

The screenshot shows the 'Add New Schedule Entry' form. At the top, a blue header contains the text 'Add New Schedule Entry'. Below it, a light blue banner states 'All required fields are marked with an asterisk *'. The form includes several fields: 'Appointment Type' (dropdown menu with 'Participant Appointment' selected), 'Program' (dropdown menu with 'Virtual Cooking Classes' selected), 'Status' (dropdown menu with 'Scheduled' selected and highlighted in red), 'End Date' (calendar icon and text '12-Jul-2022'), 'End Time' (time picker with '04 : 00'), and 'Duration' (time picker with '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**

The screenshot shows the 'Add New Schedule Entry' form. At the top, a blue header contains the text 'Add New Schedule Entry'. Below it, a light blue banner states 'All required fields are marked with an asterisk *'. The form includes several fields: 'Appointment Type' (dropdown menu with 'Participant Appointment' selected), 'Program' (dropdown menu with 'Select One' selected), 'Status' (dropdown menu with 'Scheduled' selected), 'Start Date' (calendar icon and text '06-Jun-2022'), 'Start Time' (time picker with '00 : 00'), 'End Date' (calendar icon and text '06-Jun-2022'), 'End Time' (time picker with '00 : 00'), 'All Day' (checkbox), 'Recurring' (dropdown menu with 'No' selected), and 'Duration' (time picker with '00 : 00 : 00'). Below these fields, there is a section for 'Participant(s)' with a table header: 'Name', 'TREAT #', 'DOB', 'Phone #'. To the right of the table is a search bar labeled 'Add Participant' with a red border, containing the text 'Last Name / TREAT #' and a search icon. Below the search bar, there is a section for 'Primary Worker(s)'. At the bottom of the form, there are three buttons: 'Cancel', 'Save', and 'Save & Select Note Template'.

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

Search Results
✕

1 Search Result for **Last Name/TREAT # "doe"** With Soundex

Name	TREAT #	DOB
<input checked="" type="checkbox"/> Doe, John	10017	22-May-1978

OK
Add Participant(s) to list

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

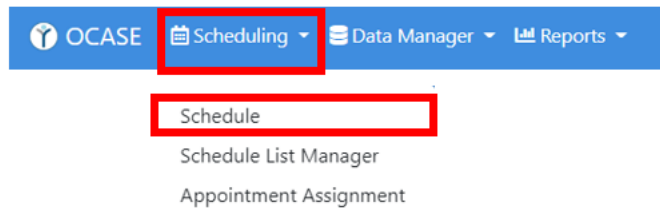
Individual Notes

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.

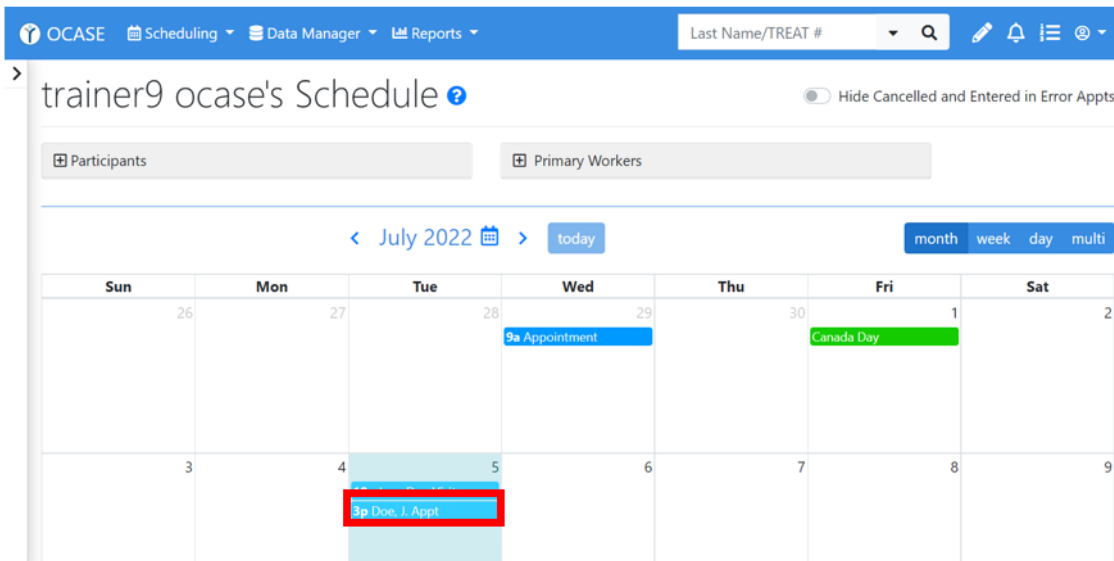
Individual notes pertain to one specific participant at a time. You are also able to view all notes attached to the participant's file

Steps to add an individual note

1. Navigate to your **schedule**



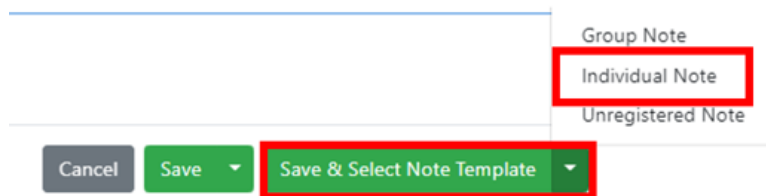
2. Select the **Activity** in the calendar that requires a note



3. Select **Edit**

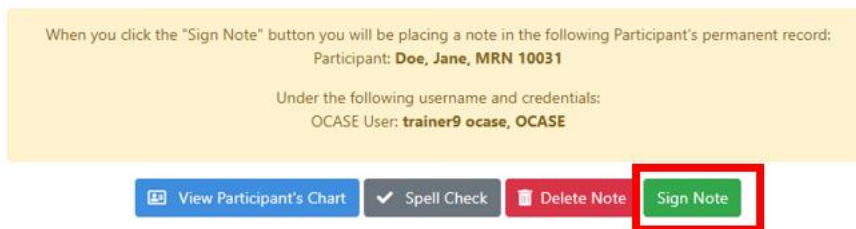


4. Scroll, then select **Save & Select Note Template** at the bottom of the Edit screen.
5. Select **Individual Note** from the list.



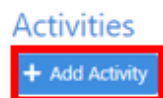
6. Fill in the **mandatory fields**
7. Scroll to the bottom and select **Sign Note**

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



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

The screenshot shows the 'Add New Activity' form. At the top, a blue header contains the title and a close button. Below it, a light blue banner states 'All required fields are marked with an asterisk *'. The form contains several fields: 'Primary Worker' (text input with 'trainer9 ocase'), 'Participant' (dropdown with 'x Kelly Riff'), 'Program' (dropdown menu highlighted with a red box), 'Comments' (text area), 'Activity' (dropdown menu), and 'Units' (text input). A blue '+ Add Activity' button is positioned to the right of the 'Units' field. At the bottom, there are 'Cancel' and 'Save' buttons.

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

This close-up shows the 'Activity' dropdown menu open. The 'Activity' and 'Units' fields are highlighted with red boxes. The dropdown menu lists several options: 'comm', 'FOOD-Community kitchen/meal program (FOOD100)', 'VOL-Education & community development (newsletter, kits) (VOL102)', and 'VOL-Serve on board/advisory committee (VOL109)'. The 'Save' button is visible below the dropdown menu.

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.

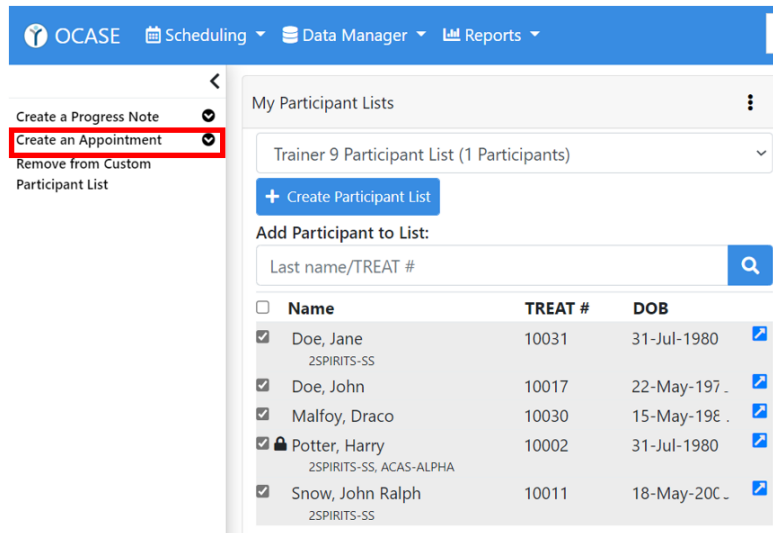
Group Appointment

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*)

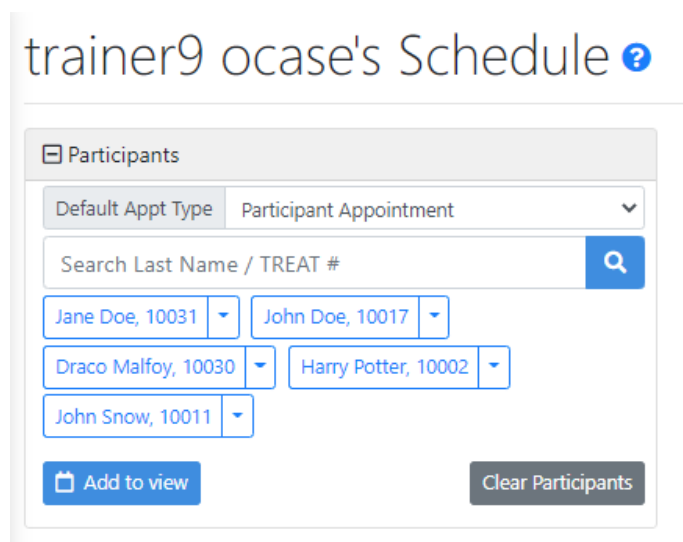
2. Select **Create Appointment** to create a group appointment within your schedule.



The screenshot shows the Ocase Scheduling interface. At the top, there are navigation tabs for 'Ocase', 'Scheduling', 'Data Manager', and 'Reports'. Below this, the 'My Participant Lists' panel is visible. It shows a dropdown menu for 'Trainer 9 Participant List (1 Participants)'. Below the dropdown is a '+ Create Participant List' button. Underneath is a search bar labeled 'Add Participant to List:' with the placeholder text 'Last name/TREAT #' and a search icon. Below the search bar is a table of participants:

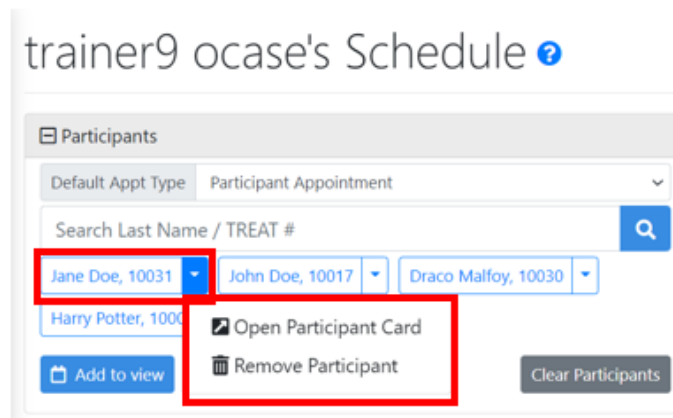
<input type="checkbox"/>	Name	TREAT #	DOB	
<input checked="" type="checkbox"/>	Doe, Jane 2SPIRITS-SS	10031	31-Jul-1980	
<input checked="" type="checkbox"/>	Doe, John	10017	22-May-197	
<input checked="" type="checkbox"/>	Malfoy, Draco	10030	15-May-19E	
<input checked="" type="checkbox"/>	Potter, Harry 2SPIRITS-SS, ACAS-ALPHA	10002	31-Jul-1980	
<input checked="" type="checkbox"/>	Snow, John Ralph 2SPIRITS-SS	10011	18-May-20C	

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



The screenshot shows the 'trainer9 ocase's Schedule' screen. The 'Participants' section is visible, showing a dropdown menu for 'Default Appt Type' set to 'Participant Appointment'. Below this is a search bar labeled 'Search Last Name / TREAT #' with a search icon. Below the search bar are five participant selection buttons: 'Jane Doe, 10031', 'John Doe, 10017', 'Draco Malfoy, 10030', 'Harry Potter, 10002', and 'John Snow, 10011'. At the bottom of the participants section are two buttons: 'Add to view' and '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, including adding activities.

Add New Schedule Entry

All required fields are marked with an asterisk *

Appointment Type *
Participant Appointment

Program: *
Select One

Status
Scheduled

Start Date *
06-Jul-2022

Start Time *
00 : 00

End Date *
06-Jul-2022

End Time *
00 : 00

All Day

Recurring
No

Duration
00 : 00 : 00

Participant(s) *

Name	TREAT #	DOB	Phone # ?		Add Participant
Jane Doe	10031	31-Jul-1980	No Phone #	<input type="checkbox"/> <input type="checkbox"/> Remove	Last Name / TREAT #

Cancel **Save** Save & Select Note Template

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.

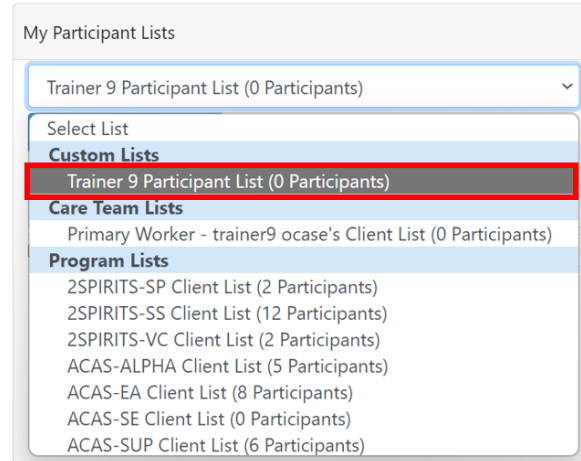
Group (Bulk) Notes

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.

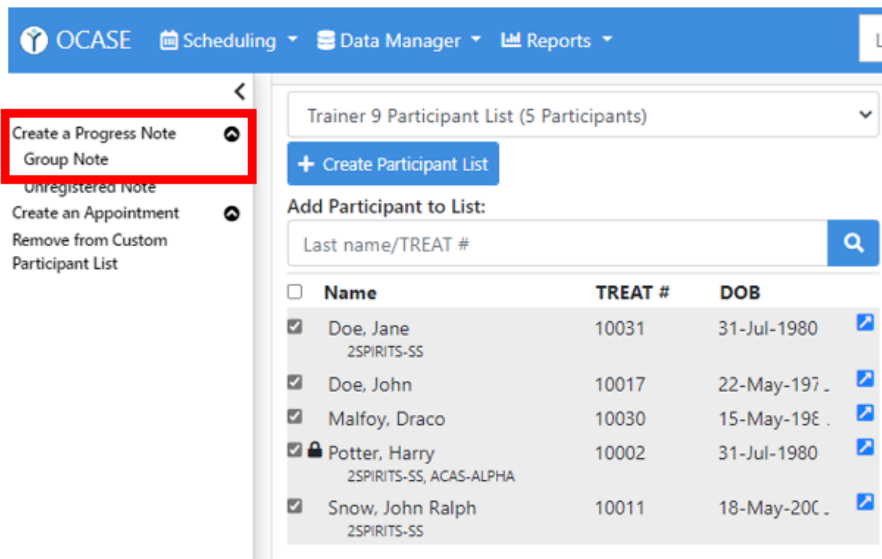
Steps to create a group (bulk) note

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**.



The screenshot shows a dropdown menu titled "My Participant Lists". The selected item is "Trainer 9 Participant List (0 Participants)". Below it, there are sections for "Select List", "Custom Lists", "Care Team Lists", and "Program Lists". The "Trainer 9 Participant List (0 Participants)" is highlighted with a red box.



The screenshot shows the OCASE home screen. The "Create a Progress Note" and "Group Note" options are highlighted with a red box. The "Group Note" option is selected. Below the navigation menu, there is a dropdown menu for "Trainer 9 Participant List (5 Participants)". A "Create Participant List" button is visible. Below that, there is a search bar for "Add Participant to List:" with the text "Last name/TREAT #". A table of participants is displayed below the search bar.

<input type="checkbox"/>	Name	TREAT #	DOB	
<input checked="" type="checkbox"/>	Doe, Jane 2SPIRITS-SS	10031	31-Jul-1980	✕
<input checked="" type="checkbox"/>	Doe, John	10017	22-May-197	✕
<input checked="" type="checkbox"/>	Malfoy, Draco	10030	15-May-198	✕
<input checked="" type="checkbox"/>	Potter, Harry 2SPIRITS-SS, ACAS-ALPHA	10002	31-Jul-1980	✕
<input checked="" type="checkbox"/>	Snow, John Ralph 2SPIRITS-SS	10011	18-May-200	✕

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**

Activities

[+ 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

- x Amy Pond
- x Care Test
- x Fluffy Dog
- x Green Goblin
- x Kelly Riff
- x Peter Ramirez
- x Roxy L Cruze

Program *
ACAS-SE

Comments ⓘ
Each participant received a care package with ingredients ✓

Activity *
FOOD-Food hamper/Holiday food bask... x

Units *
7 ✓

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

View Schedule Entry

[Edit](#)

Appointment Type: Participant Appointment
Program: Support Services
Status: Scheduled
Start Date: 29-Jun-2022 09:00 **End Date:** 29-Jun-2022 10:00
Duration: 00 : 01 : 00
Recurring: No

Participant(s)*

Name	TREAT #	DOB	Phone # ?
John Doe	10017	22-May-1978	No Phone # ?

Primary Worker(s)*

Name	Email Address	Phone #
trainer9	ocase	

Appointment

Site:
Visit Type: Visit
Encounter Type: Email/Text

[OK](#)

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**

Add New Schedule Entry

All required fields are marked with an asterisk *

Appointment Type *
Participant Appointment

Program: *
Select One

Status
Scheduled

Start Date * 06-Jun-2022 Start Time * 00 : 00 End Date * 06-Jun-2022 End Time * 00 : 00

All Day

Recurring
No

Duration
00 : 00 : 00

Participant(s) *

Name	TREAT #	DOB	Phone # ?
------	---------	-----	-----------

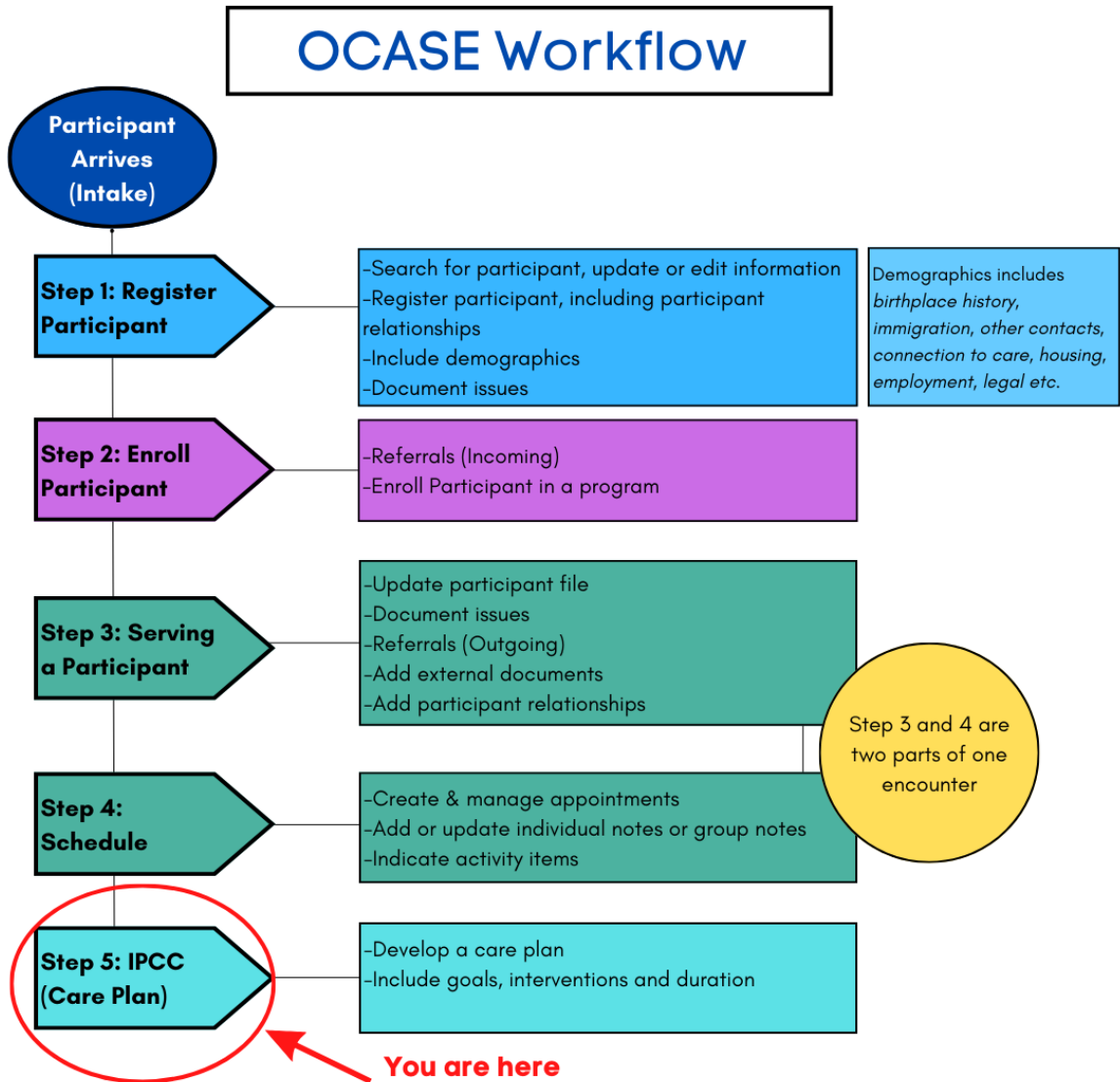
Add Participant
Last Name / TREAT #

Primary Worker(s) *

Cancel Save Save & Select Note Template

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.

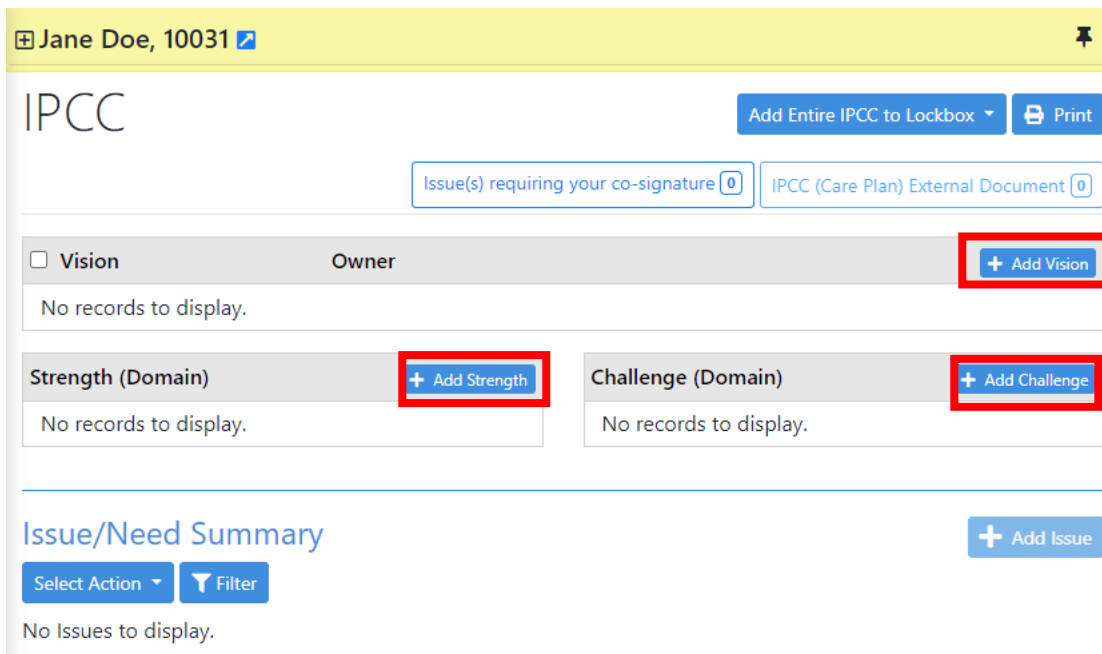
Steps to create an IPCC


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

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


- 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 

IPCC

[Add Entire IPCC to Lockbox](#)  [Print](#)


Vision Owner [+ Add Vision](#)

No records to display.

Strength (Domain) [+ Add Strength](#) **Challenge (Domain)** [+ Add Challenge](#)

No records to display. No records to display.

Issue/Need Summary

[+ Add Issue](#) [Select Action](#)  [Filter](#)

No Issues to display.

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**

Issue/Need Summary + Add Issue

Select Action Filter

<input type="checkbox"/>	Issues / Needs Title	Domain	Issue Status	Last Modified By	Last Modified	Participant Priority	Primary Worker Priority	Active Goals	Complete Goals	Active Plan	
<input type="checkbox"/>	HOUS - Difficulties paying rent	Housing (HOUS)	In Progress	trainer9 ocase	05-Jul-2022 02:49:59 PM	High	High	0	0	1	Edit

Select Action

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 asterisk *

Issue/Need Summary

Issue/Need Title *

Issue/Need Details

Domain *

- | | | |
|--|--|---|
| <input type="radio"/> Current Safety Concerns (SAFE) | <input type="radio"/> Living with HIV (HIV) | <input type="radio"/> Housing (HOUS) |
| <input type="radio"/> Food security (FOOD) | <input type="radio"/> Well-being (WELL) | <input type="radio"/> Income and benefits (INC) |
| <input type="radio"/> Education/Employment (EDU) | <input type="radio"/> Social/Personal Concerns (SOC) | <input type="radio"/> Legal issues (LEG) |
| <input type="radio"/> Immigration (IMM) | | |

Notifications

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

The screenshot shows the OCASE system interface. At the top is a blue navigation bar with the OCASE logo, menu items for 'Scheduling', 'Data Manager', and 'Reports', a search bar containing 'Last Name/TREAT #', and a pencil icon highlighted with a red square. Below the navigation bar is a blue 'Module Notifications' pop-up window with a close button (X). The window displays three notification categories, each with a count of zero:

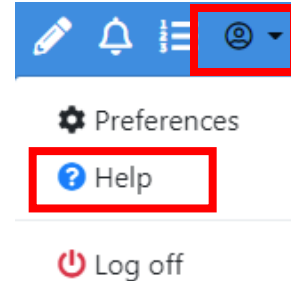
- Progress Notes Notifications**
 - Notes requiring your co-signature: 0
 - Notes requiring corrections: 0
 - Draft Notes: 0
 - Group Notes to be completed: 0
- IPCC Notifications**
 - Issues requiring your co-signature: 0
- Assessment Notifications**
 - Assessments requiring your signature: 0

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**



OCASE Support

Agency Support

Please fill in the following information:

Primary Contact:

Name: _____ Email: _____

Secondary Contact:

OHTN OCASE Support: ocase@ohln.on.ca

Online Resources

[Privacy & Security Best Practices - Top 10 : OHTN Support \(ohln.freshdesk.com\)](https://ohln.freshdesk.com)

[Information Security Fundamentals - Best Practices : OHTN Support \(ohln.freshdesk.com\)](https://ohln.freshdesk.com)

[OCASE TREAT Training Videos - YouTube](#)

[OCASE Resources & Training – The Ontario HIV Treatment Network \(ohln.on.ca\)](https://ohln.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)** only and are covered in an earlier chapter as well.

- 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
 - 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

Reason

Status Waitlisted

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
- 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
- External Documents
- Tasks
- Alerts
- Lockboxes
- Data Export

- I. Select +/- to open Waitlist information.

The screenshot shows the 'Waitlists' section of a software interface. At the top, there is a table with columns: Referral ID, Decision Date, Program, Clinician, Priority, Date Service Available, Date Removed, and WL Days. The first row contains the values: 1, 09-May-2022, 2SPIRITS-SP, Medium, and 50. Below the table, there is a detailed view of the selected entry (Referral ID 1). This view includes fields for Referral ID, Program, Reason for Waitlist, Clinician, Priority, Decision Date, Date Service Available, Date Removed, Reason for Removal from Waitlist, and Notes. The 'WL Days' field is circled in red and shows the value 50.

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
Food Security (FOOD)	EDU/EMP - Work related stress
	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
Living with HIV (HIV)	FOOD - Require food/life skills support
	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 (INCOM)	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 (LEGAL)	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)

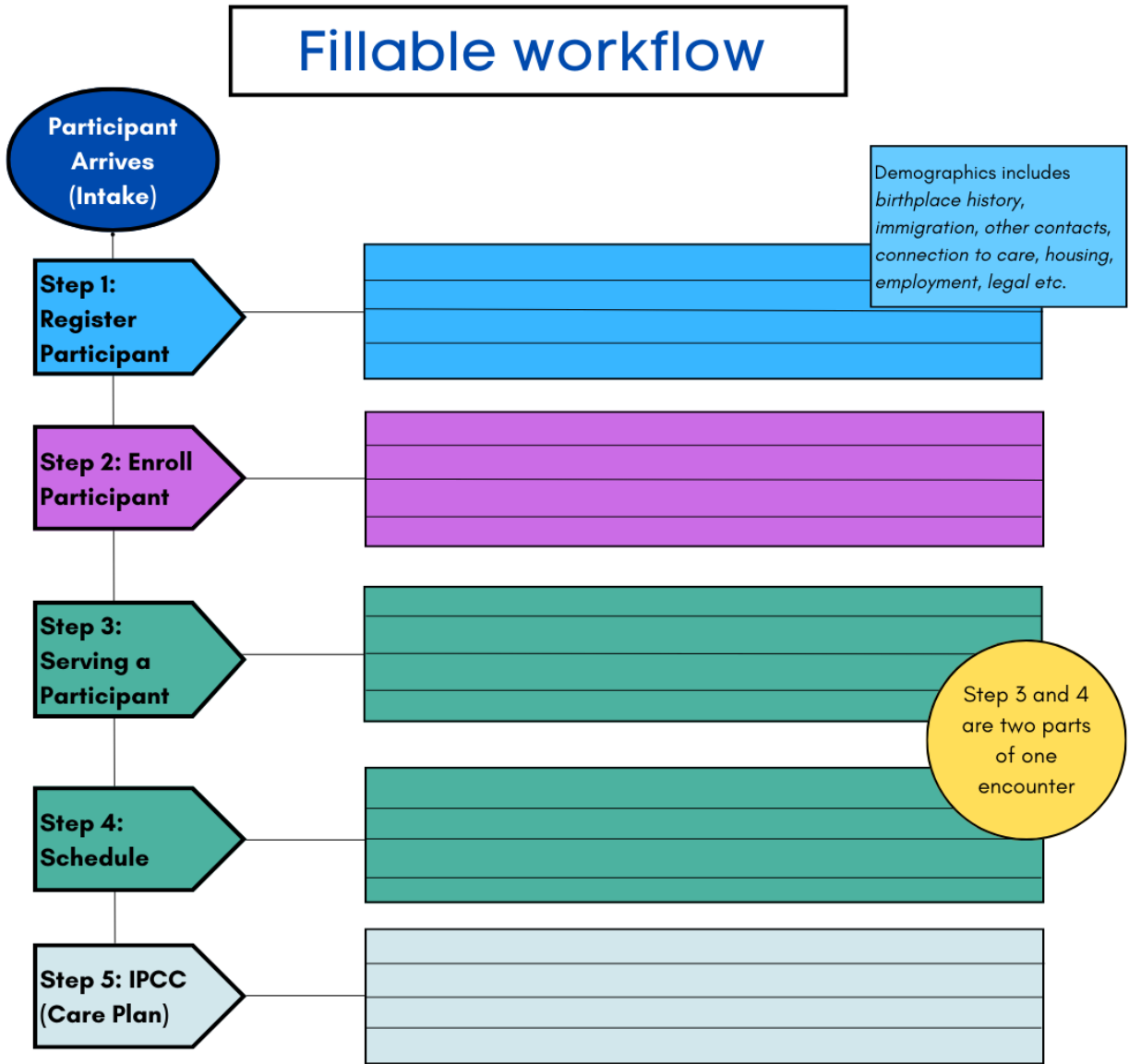
	FOOD-Family box
	FOOD-Food bank
	FOOD-Food hamper/Holiday food basket
	FOOD-Food voucher/Gift card
	FOOD-Groceries
Intake	INTAKE-Determine eligibility for agency services
	INTAKE-Engagement
	INTAKE-Orientation to the agency
	INTAKE-Preliminary assessment of priorities
	INTAKE-Program specific intake
	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



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

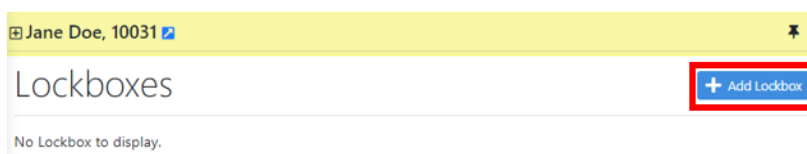
Depending on your agency’s policy, contact ocase@ohrn.on.ca to make changes to permissions.

STEPS TO ADD A LOCKBOX

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

- 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
- External Documents
- Tasks
- Alerts
- Lockboxes**
- Data Export

2. Select **Add Lockbox**



- 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**.

Jane Doe, 10031

Create Lockbox

All required fields are marked with an asterisk *

Lockbox Type *

Full lockbox
Restricts the Participant's entire record. A restricted user will be able to see the Participant in search results but will be unable access any information in the record.

Partial lockbox
Allows you and other permitted users to select which information the lockbox affects. Can restrict access to the same information as a Full Lockbox, except for demographics. Each document must be manually added after the creation of the Partial Lockbox.

Lockbox Title *

05-Jul-2022 12:39:12 PM
Default is current date and time.

Access Control *

Permit users
Selected users will be the only ones allowed to view locked information. If selected and the "Users" field is left blank, all users will be able to see the information without breaking the lock.

Restrict users
Selected users will be the only ones prevented from viewing locked information. If selected and the "Users" field is left blank, all users will be restricted by the lock.

Users

Search for user by username

Cancel Save

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

- 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
- External Documents
- Tasks
- Alerts
- Lockboxes
- Data Export

- Select the desired Progress Note from the **Existing Progress Notes**:

Existing Progress Notes

Select Action Filters Expand context detail information

<input type="checkbox"/>	Signed	Late entry	Note type	Unit/Location	Detail	Author	Interaction start	Updated
<input checked="" type="checkbox"/>	13-Jan-2023 10:54:27 AM		Individual Note	2SPIRITS-SS	Progress Note	trainer9 ocase	13-Jan-2023 09:00:00 AM	<input type="checkbox"/> Edit

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

Progress Notes

Progress Note External Document

0 Domains with Issues in Progress

New Progress Note

Choose a progress note

Individual Note

Existing Progress Notes

Select Action Filters Expand context detail information

Add Lockbox	Date entry	Note type	Unit/Location	Detail	Author	Interaction start	Updated	
Add to: Lockbox1	10:54:27 AM	Individual Note	2SPIRITS-SS	Progress Note	trainer9 ocace	13-Jan-2023 09:00:00 AM		

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

Jane Doe, 10031

Lockboxes


	Lockbox Title	Type	Date Created	Last Modified		
	29-Jun-2022 10:40:00 AM	Partial Lockbox	29-Jun-2022 10:43:13 AM	29-Jun-2022 10:43:13 AM		

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

Existing Progress Notes

Select Action ▾ Filters

Expand context detail information

<input type="checkbox"/>	Signed ▾	Late entry ⇅	Note type ⇅	Unit/Location ⇅	Detail ⇅	Author ⇅	Interaction start ⇅	Updated ⇅	
<input type="checkbox"/>	11-Jan-2023 01:41:01 PM		Group Note	2SPIRITS-VC		trainer9 ocase	11-Jan-2023 09:00:00 AM		 Edit

Not Authorized

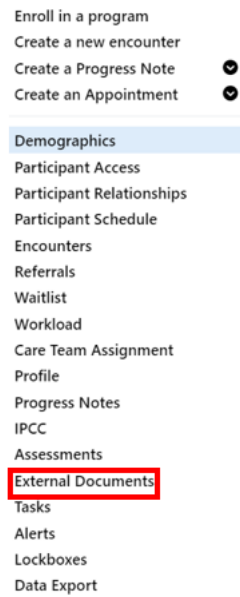
WARNING!
You are not authorized to view this page.

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**

External Documents

+ Add External Document

Select Action * Filters

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

Add External Document

All required fields are marked with an asterisk *

Current Document *

[No file selected]

Select Document

Document Date *

Description

Document Type *

Select One

Document Sub Type *

Please select Document Type first

Document Sharing

Indicate below whether to share this entry with all users, or to restrict access to only those users with access to the program selected

Share with all

Restrict Access

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

Choose a Program below to associate with this entry *

Currently Selected: 2SPIRITS-SS

Select	Program	Encounter #	Start Date	End Date	Status	Visit Type	Enc Type	Close Reason
<input checked="" type="radio"/>	2SPIRITS-SS	0000000669	15-Aug-2022	--	Admitted	Enrollment	--	--
<input type="radio"/>	ACAS-EA	0000000691	09-Aug-2022	--	Admitted	Enrollment	--	--
<input type="radio"/>	2SPIRITS-VCG	0000000670	01-Aug-2022	31-Dec-2022	Admitted	Enrollment	--	--
<input type="radio"/>	2SPIRITS-VC	0000000671	01-Aug-2022	--	Admitted	Enrollment	--	--

Open encounters (1 to 4 of 4) found

Show discharged/other encounters

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

External Documents

Select Action

<input type="checkbox"/>	Document Date	Type	Sub Type	Description	Program	Imported Date	Imported By	<input type="button" value="Edit"/>
<input checked="" type="checkbox"/>	3-Jan-2023	IPCC (Care Plan)	Report/Summary/Review	Medical Report	2SPIRITS-SS	13-Jan-2023	trainer9 ocace	<input type="button" value="Edit"/>

Select Action

Displaying External Documents 1 to 1 of 1

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

External Documents

Select Action

Lockbox

Add to: Lockbox1

<input type="checkbox"/>	Document Date	Type	Sub Type	Description	Program	Imported Date	Imported By	<input type="button" value="Edit"/>
<input type="checkbox"/>	3-Jan-2023	IPCC (Care Plan)	Report/Summary/Review	Medical Report	2SPIRITS-SS	13-Jan-2023	trainer9 ocace	<input type="button" value="Edit"/>

Select Action

Displaying External Documents 1 to 1 of 1