

OCASE TREAT User Guide

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TREAT



OHTN

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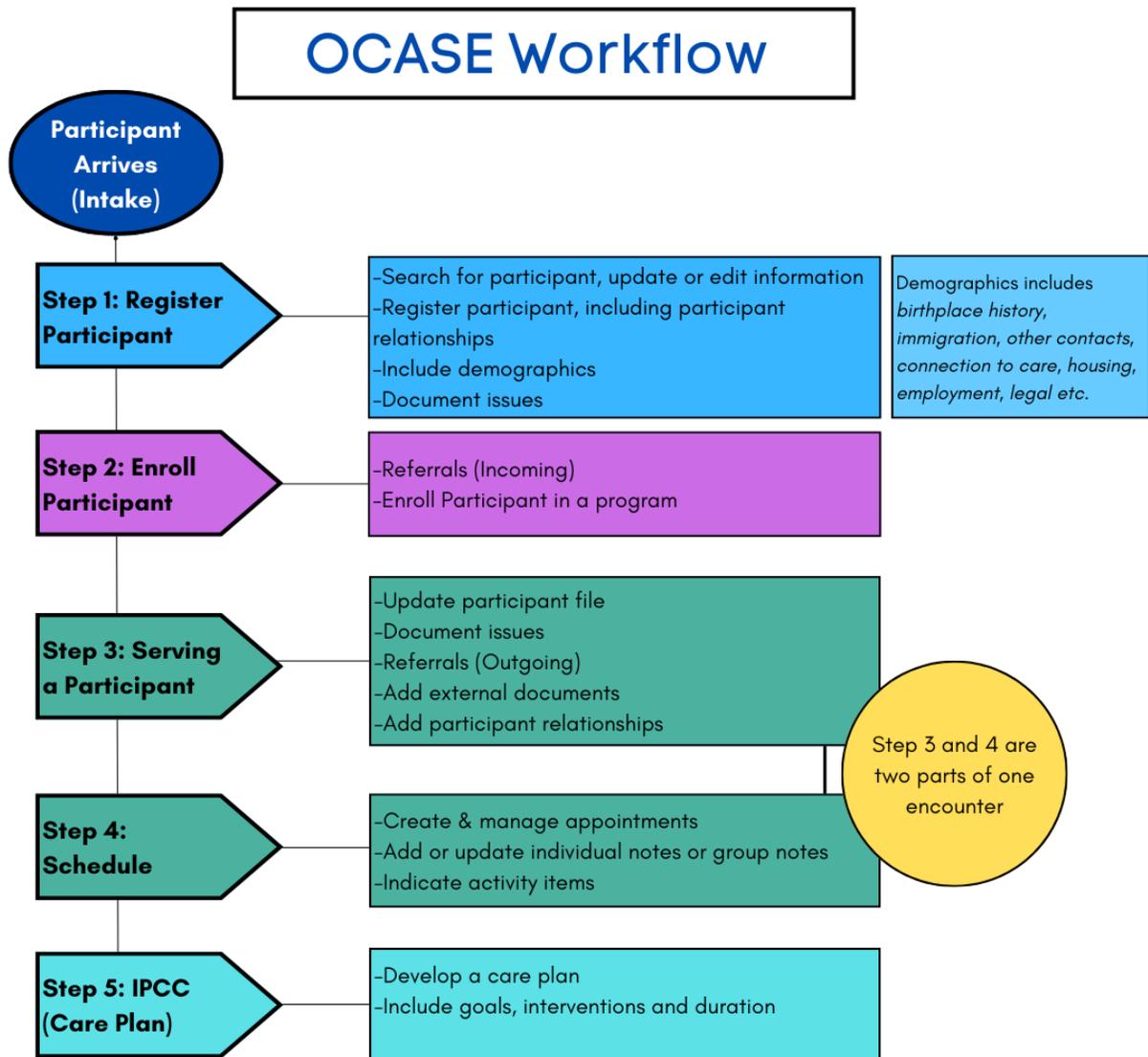
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OCASE User Guide

This is a step-by-step guide of the new OCASE System called TREAT. TREAT 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

Organization ID: ocase

User ID

Password

[Forgot password?](#)

[Log On](#)

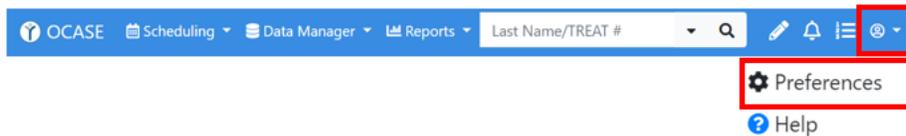
TREAT Version 5.17.0

Password

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

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

Keep track of your temporary password to complete the process successfully



2. The **Change Password** tab and options will appear on the screen
3. Select **Save**

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

Account Management

User Information	
First Name:	trainer9
Last Name:	ocase
Primary Position:	
Change Password	

All required fields are marked with an asterisk *

Change Password

New Password *

Repeat Password *

Confirm Password

Enter your old password to submit changes *

Safety and Security

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

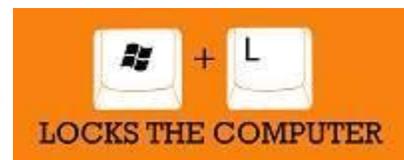
- Passwords require updating every 3 months.
- You will be automatically logged out of the new system after 30 minutes of inactivity. You will receive a pop-up notification after 25 minutes.
- If you fail authentication 3 consecutive times (i.e. unsuccessful login attempts), your account will be disabled temporarily and it will be automatically re-enabled after 3 ½ hours. Then you can login successfully, if you recall your current password correctly. Otherwise, contact your system administrator or designate.
- When you are completely 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*

Lock Computer:



Forgot Password? Feature

You can only use this feature if you have already taken the time to Answer your Security Questions

Go to <https://www.treat.ca/treat/logon>

If you click **Forgot Password?** without first setting up your Security Questions, you will see the following message:

"Sorry, your password cannot be reset through this feature because your account does not have any security questions set up yet. Please contact your TREAT Administrator to reset your password. Once you have logged into TREAT, you can set up your security questions for future password reset requests.

If you did not request to change your password, please report this email to your TREAT Administrator."

1. **Organization ID:** ocase
2. Click the **Continue** blue button
3. Click '**Forgot password?**' link
4. Fill-in your **User ID**
5. Fill in the **Organization ID**

6. Fill in your **work email address (the one linked to your TREAT profile)**

7. Click the green **Submit** button

Please enter your User ID and Organization ID that you use to log into TREAT. If you do not know these IDs, you must contact your TREAT Administrator for support.

Please enter the email address that is associated with your TREAT account. If you do not know this email address you must contact your TREAT Administrator for support.

Reset Password

An email with a link to reset your TREAT password will be sent to the email address associated with your account.

User ID *

Organization ID *

Please enter your User ID and Organization ID that you use to log into TREAT. If you do not know these IDs, you must contact your TREAT Administrator for support.

Email Address *

Please enter the email address that is associated with your TREAT account. If you do not know this email address you must contact your TREAT Administrator for support.

Cancel Submit

8. You will see a 'Reset Password' (on screen) response in your browser:

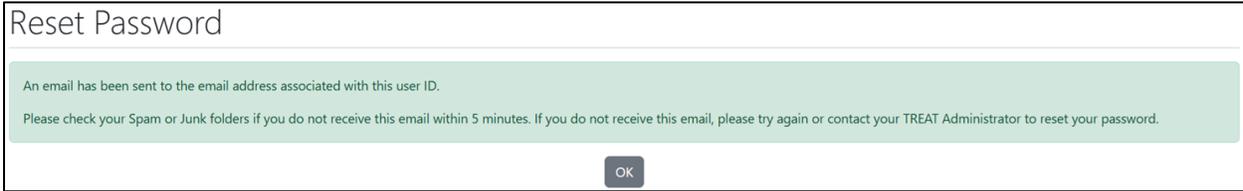


Image reads: "An email has been sent to the email address associated with this User ID. Please check your Spam or Junk folders if you do not receive this email within 5 minutes. If you do not receive this email, please try again or contact your TREAT Administrator to reset your password."

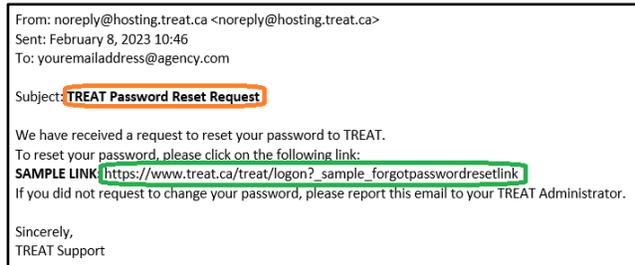
9. Click **OK**

Note: If you repeat this Reset Password request before receiving the email, then when you use the link in the email, you may see the following message: "Invalid password reset link. Please repeat password reset process."

Recommendation: Wait about 10 minutes before repeating the steps of Forgot password?

10. You will receive an automated email message from No Reply (check your Spam or Junk folder if you do not see it)

- **Subject of the email:** TREAT Password Reset Request

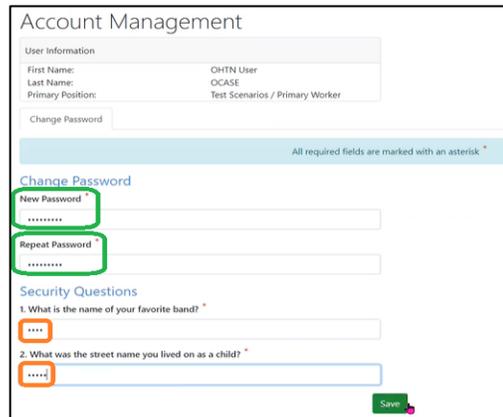


11. Click on the link in the email (or copy/paste the link into the address bar of your browser)

12. You will land on the **Account Management** screen.

Here, you will need to type a new password, confirm it in the next field and then you will need to answer two (2) Security Questions (two of the four questions you provided answers for in Account Management during the set-up process).

If you answer one or both of the security questions **incorrectly** you will be granted four more attempts. If you answer either one or both of these questions five time, then your account will be fully disabled. You will need to contact your System Administrator or you OCASE Designate for assistance.



13. Click **Save**.

If you have completed everything correctly, you will receive another automated email message from No Reply (check your Spam or Junk folder if you do not see it).

14. Now you will be taken to your TREAT Homepage.

From: noreply@hosting.treat.ca <noreply@hosting.treat.ca>
Sent: February 8, 2023 10:47
To: youremailaddress@agency.com
Subject: **TREAT Change Password Confirmation**

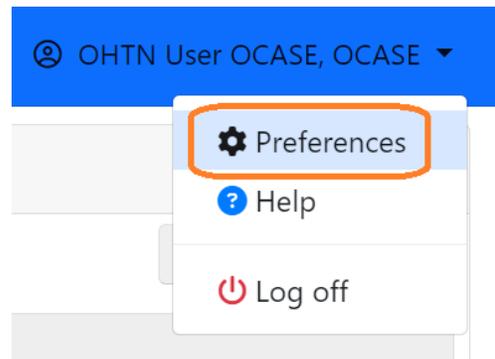
This is a message to let you know that your TREAT password was successfully changed. If you did not change your password, please report this email to your TREAT Administrator.

Sincerely,
TREAT Support

Recommendation: Logoff and then Logon now using your new password.

Security Question/Answer Setup Process

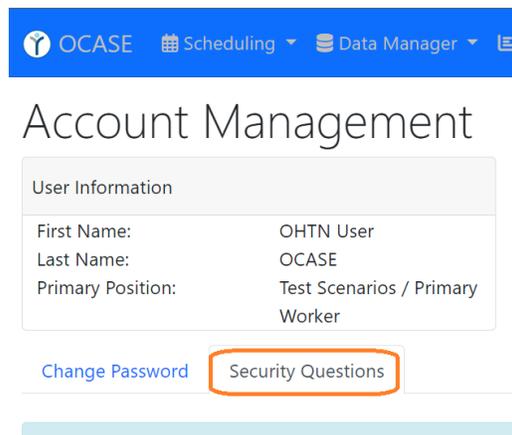
1. Click on your name in the top-right corner of the blue bar
2. Select **Preferences**
3. You are on the **Account Management** screen
4. Select the **Security Questions** tab



You will need to answer four Security Questions: keep it simple.

1. Select a Question
2. **Type a single word answer, and lowercase to keep it simple**

Tip: your answer does not have to match the nature of the question. For example, here are possible answers – orange, purple, green, yellow OR alberta, manitoba, ontario, quebec.



3. At the end you will need to **Confirm Password** - Enter your password to submit changes
4. Click the green Save icon
5. You will see Save Successful nearer the top of the screen

If you are not returned to your TREAT Homepage, then **click Cancel after Saving Successfully.**

The screenshot shows the 'Account Management' page. At the top, there is a 'User Information' section with fields for First Name (Ortiz, Carlos), Last Name (Joseph), and Primary Position (Lead, Agency Support & Partnership). Below this is a 'Change Password' link. The main section is 'Security Questions', which includes a note: 'Please select and answer all security questions. These questions will be used in the future should you forget your password and need it reset.' There are four questions, each with a dropdown menu and an answer field. The questions are:

- Question 1: What was the street name you lived on as a child?
- Question 2: What school did you attend for sixth grade?
- Question 3: What was your first job?
- Question 4: What was the type of animal and the name of your first pet? Use the format Animal, Name (e.g. Dog, ...)

 At the bottom, there is a 'Confirm Password' section with the instruction 'Enter your password to submit changes'. There are 'Cancel' and 'Save' buttons at the bottom right. Several fields and the 'Save' button are highlighted with orange boxes in the original image.

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 a follow-up for a warm referral. See: Create a Task for “Follow-up Date”, pg. 26

Register a Participant

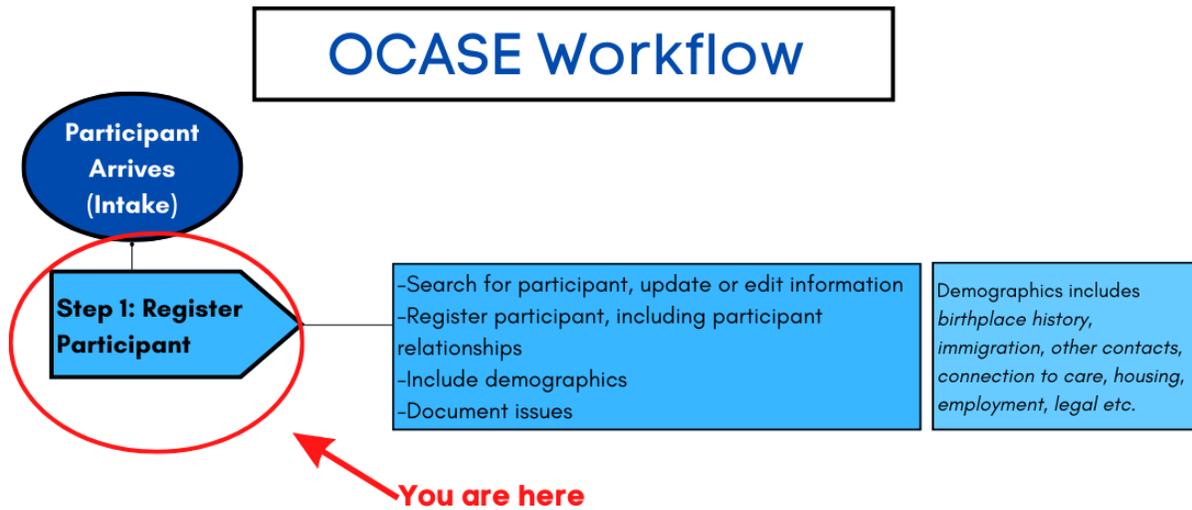
In this section, you will:

- 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 or a portion of the last name to ensure no duplicates are created. Also try a portion of the last name, starting at the beginning of the last name.

OCASE Scheduling Data Manager Reports

Last Name/TREAT #

2. If there is no participant with the last name being searched, try the Advanced Search feature to search using the first name or a portion of the first name, starting at the beginning of the first name.

Advanced Search Criteria

Last Name

First Name

3. If there is no participant with either 'that' last name or 'that' first name, then select the green button **Register Participant**

Participant Search

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

Refine Search Results

No Participants found

Register Participant

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

Find an Existing Participant

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

Steps to search for a participant

1. Select the participants search tab

OCASE | Scheduling | Data Manager | Reports | Last Name/TREAT # | Search | Edit | Bell | List | Settings

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:

HERE ARE SOME OF EXAMPLES OF FIRST NAME LAST NAME:

- Luka Skywalker
- T84DWK77 T84DWK77
- Luka T84DWK77
- T84DWK77 Skywalker

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 you were search for, 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, i.e., when the yellow bar is visible, it means that everything you are seeing on the screen is related to the highlighted participant.

2. Select **Demographics** on the left panel of the screen. Click the (+) to see more details – using this plus sign gives you a shortcut to the demographics and other profile information.

- Enroll in a program
- Create a new encounter
- 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



Refer to page 7 – Intake section - [Support Services Resource Guide \(May 2025\)](#)

Referrals (Incoming)

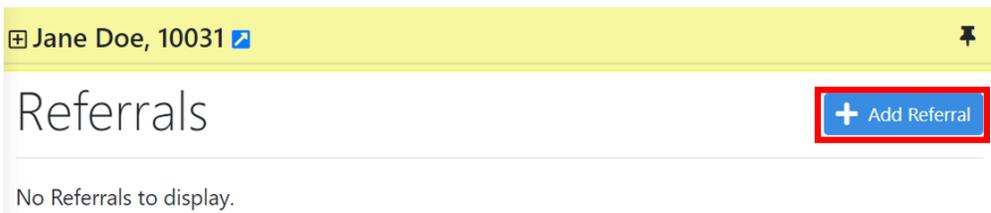
This is used for **incoming referrals only**. Incoming Referrals could be document written, verbal and cross-program internal referrals. This process is optional. It is to be used for your internal program statistics and these incoming referrals are not going to be reported to the Ministry of Health.

Steps to add referrals (incoming)

1. With the participant in context, *i.e.*, when the yellow bar is visible, it means that everything you are seeing on the screen is related to the highlighted participant, 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:

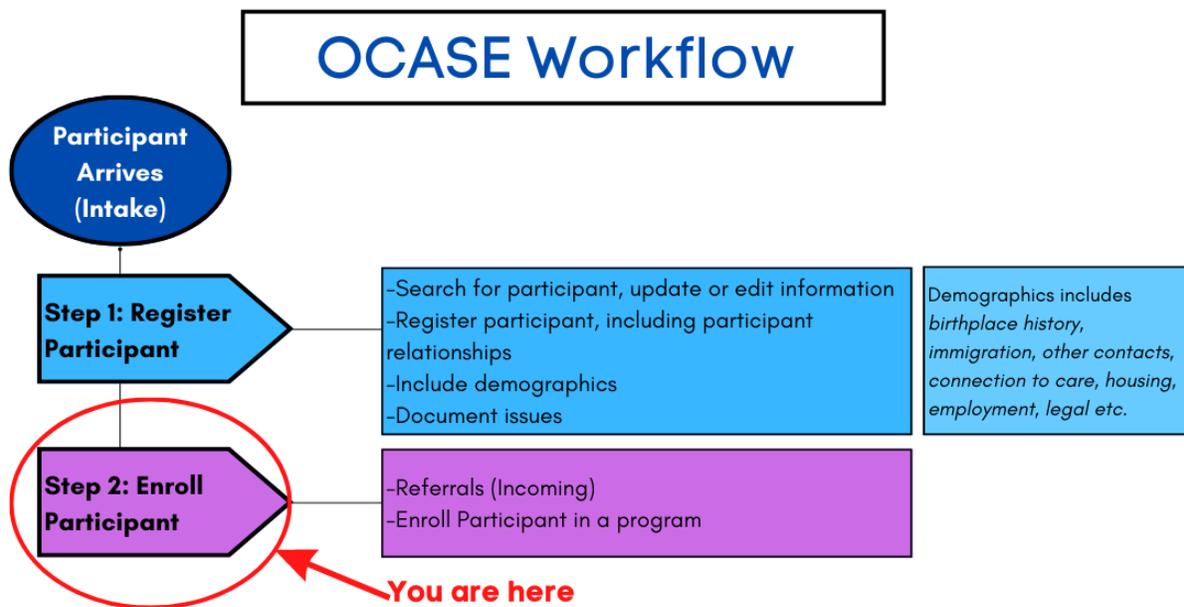
- Input incoming referrals, and enroll a participant in a program.

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 (close the program) you will discharge them from the program. The participant can be added back to the program (reopen 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 – the row that shows Visit Type = Enrollment – see image below. 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	--	
2SPIRITS-SS	0000001753	06-Feb-2023	06-Feb-2023	Scheduled	Visit	Video Conference	--	
2SPIRITS-SS	0000002499	03-Feb-2023	03-Feb-2023	Scheduled	Visit	Office	--	
2SPIRITS-SS	0000001719	30-Jan-2023	30-Jan-2023	Scheduled	Visit	Video Conference	--	
2SPIRITS-SS	0000004728	12-Jan-2023	12-Jan-2023	Cancelled	Visit	Office	--	
ACAS-EA	0000004879	12-Jan-2023	--	Admitted	Enrollment	--	--	

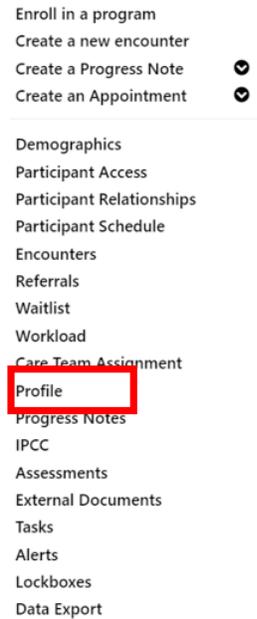
When a participant's program enrollment status is updated to any status except 'Open', the following information will need to be included: **End Date and Closed Reason**.
When entering '**Deceased**' as the Closed Reason, be sure to update the **Demographics** screen as well.

Demographics

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

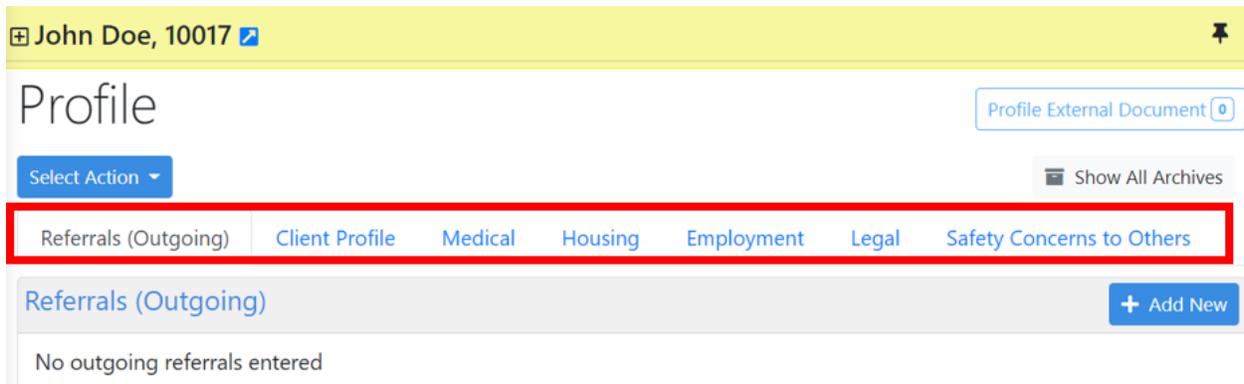
Steps to add demographics

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.

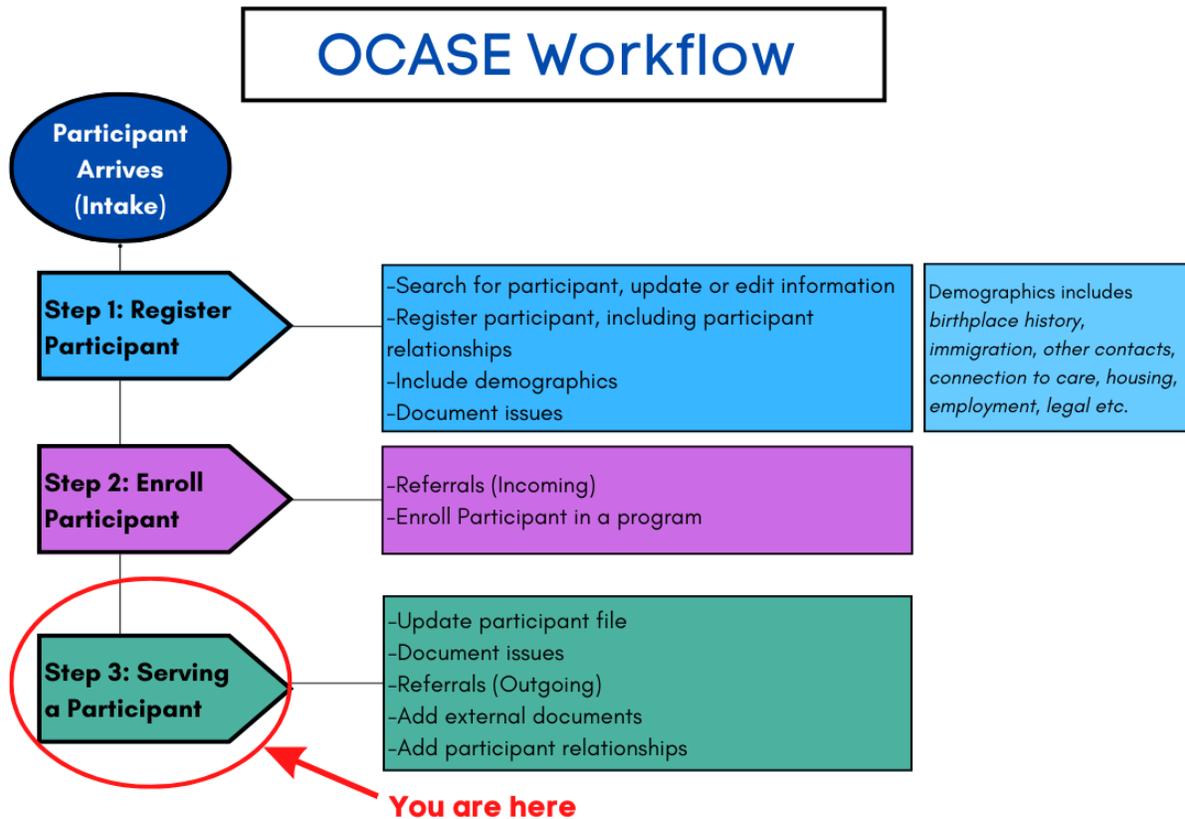


Serving a Participant

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 detailing of presenting issues (IPCC) 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.



Refer to Intake section pg. 7 - [Support Services Resource Guide \(May 2025\)](#)

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

Issue/Need Details

HIV) Housing (HOUS)

L) Income and benefits (INC)

Concerns (SOC) Legal issues (LEG)

Immigration (IMM)

4. Select a **Domain**

Domain *

Current Safety Concerns (SAFE) Living with HIV (HIV) Housing (HOUS)

Food security (FOOD) Well-being (WELL) Income and benefits (INC)

Education/Employment (EDU) Social/Personal Concerns (SOC) Legal issues (LEG)

Immigration (IMM)

Refer to Presented Issues Data Elements pg. 36 – [Support Services Resource Guide \(May 2025\)](#)

5. 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

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

- 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

Refer to pg. 23 – Referrals – [Support Services Resource Guide \(May 2025\)](#)

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. The '+ Add New' button is also highlighted with a red box. Other tabs include Client Profile, Medical, Housing, Employment, Legal, and Safety Concerns to Others. A 'Profile External Document' button and a 'Show All Archives' button are also visible.

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 it, 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 'Cancel' and 'Save' buttons are at the bottom, with 'Save' highlighted in green and both buttons outlined in red.

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.

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* Issue Detail* Referral Agency Name Status*

Follow-up Date Date*

Referral Agency Type* Referral Agency Address Referral Agency Contact Name/Details

Consent Provided* Notes

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

Create a Task for “Follow-up Date”

Tasks can serve as a reminder that a specific action or activity is required – a “To-Do” list. List icon – top right

- Secure way to communicate about community members (i.e., clients) amongst yourselves
- Complete task and make a note about action taken; notes remain in the client’s file
- Please remember that email is not secure – do not enter private details into an email

OCASE | 📅 Scheduling | 📄 Data Manager

🏠 Test MIDDLE Z
 ACC-COOK_CIR (OHTN C

Enroll in a program
 Create a Progress Note
 Create an Appointment
Create a Task

Demographics
 First Name

Complete the required fields:

- Task – How will the task be completed? - Required
- Request – free text to type details of Task – this feature is secure, so you may type private details here – Required
- Due Date – Enter the Follow-up Date here – Required
- User Recipients – Assigned To (Self or Specific Primary Worker) – Required
- Click the green Save icon
- Optional fields are “Instructions” and “Add Additional Notes To Task” – here too, you may type private details because TREAT is a secure system

Participant(s)

Participants

Search Last Name/TREAT #

Test, ZZTest, 1

Clear Participants

Task

How will the task be completed? *

Manual

Request

Due Date

dd-mmm-yyyy

Instructions

User Recipients

Assigned To *

Self

Add Additional Notes To Task

Cancel Save

Confirm Custom Task

If you click Save, a task will be created for the following clients:

Test

This action cannot be undone. Are you sure you want to continue?

Close Save

Name	TREAT #	Location	Admit Date	Type	Action Required	Due Date
Test ZZTest	1	N/A	N/A	Manual Task	Help this individual with transportation	23-Jun-2025

Select Action

- Assign Task(s) to Clinician
- View Task Details
- View Information

Dismiss Task

Please select a reason for dismissing this Custom Task task.

Select Reason...

Select Reason...

Action completed

No action required

Update Task Details or Dismiss Task

- Assign Task(s) to Clinician: select Task, select option and click green icon 'Assign Task'
- View Task Details: select Task and simply view the Task details, click gray icon 'OK'
- Post New Comment: Click on the comment bubbles, view Comments History, type and then click green icon 'Post New Comment'
- Dismiss Task: click on the trash can, select the reason and then click red icon 'Dismiss'
 - Action completed
 - No action required

The screenshot shows a 'Comments' dialog box with a blue header and a close button (X) in the top right corner. Below the header, there is a text input field with the placeholder text 'Add a new comment below:'. Underneath the input field is a green button labeled 'Post New Comment'. Below the button is a section titled 'Comments History' with a refresh icon and the text 'Last Refreshed 09:59:19 AM'. The history contains two entries, both from '(18-Jun-2025 09:42:58 AM) You (OHTN Carlos Joseph)'. The first entry is 'Instructions: Test task feature'. The second entry is a comment: 'Comment: Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.'

Task Notification: top-right of the blue bar



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

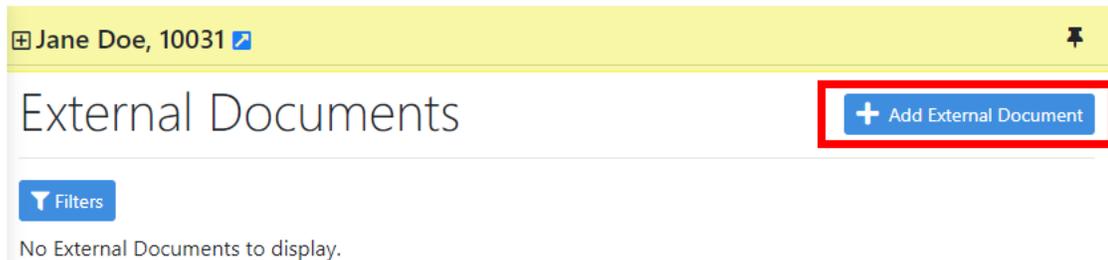
Steps to attach external documents

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

Select Action

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

External Documents

+ Add External Document

Select Action ▾ Filters

<input type="checkbox"/> +	Document Date ▾	Type ▾	Sub Type ▾	Description ▾	Imported Date ▾	Imported By ▾	
<input type="checkbox"/> +	10-May-2022	Demographics	Health Card/Driver's License	Drivers License	10-May-2022	trainer9 ocase	

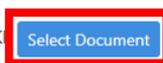
Select Action ▾

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

All required fields are marked with an asterisk *

Current Document *
Test123.pdf - File Size: 35K 

Document Date *
29-Jun-2022 

Description
Test123

Document Type *
Demographics ▾

Document Sub Type *
Health Card/Driver's License ▾

Optional: now that the External Document has been added, you can link it to a Progress Note.

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.

- All participants must be Enrolled in the same Program when Creating a Progress Note or Creating an Appointment

Steps to create a participant list

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

OCASE | [Scheduling](#) | [Data Manager](#) | [Reports](#)

My Participant Lists

Trainer 9 Participant List (0 Participants)

+ Create Participant List

Add Participant to List:

Last name/TREAT #

<input type="checkbox"/>	Name	TREAT #	DOB
--------------------------	------	---------	-----

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

Create New Participant List

Participant list type:

Program based

* Program:

2SPIRITS-VC

* Participant list name:

2SPIRITS-VC

Cancel Create Participant list Next

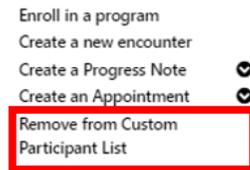
4. Select the participants who take part in the program.
5. Select **Create Participant List**

Create New Participant List

	Name	TREAT #	DOB	Admit Date
<input type="checkbox"/>	Cage, Xander	10008	09-May-1968	10-May-2022
<input type="checkbox"/>	Edge, Ford	10012	01-May-1900	09-May-2022

Previous Cancel Create Participant list

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

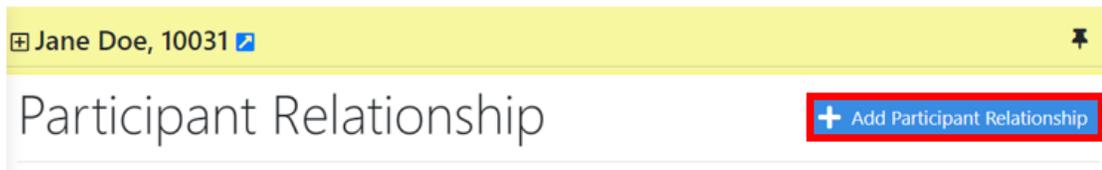
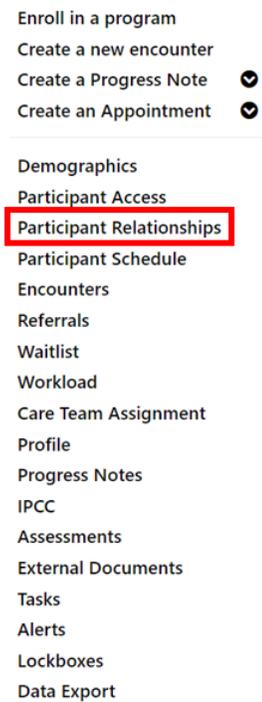


Participant Relationships

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

Steps to add participant relationships

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 (added) to OCASE with their own TREAT ID, in order to be registered in the baby formula program.

- 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, i.e., when the yellow bar is visible, it means that everything you are seeing on the screen is related to the highlighted participant, 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

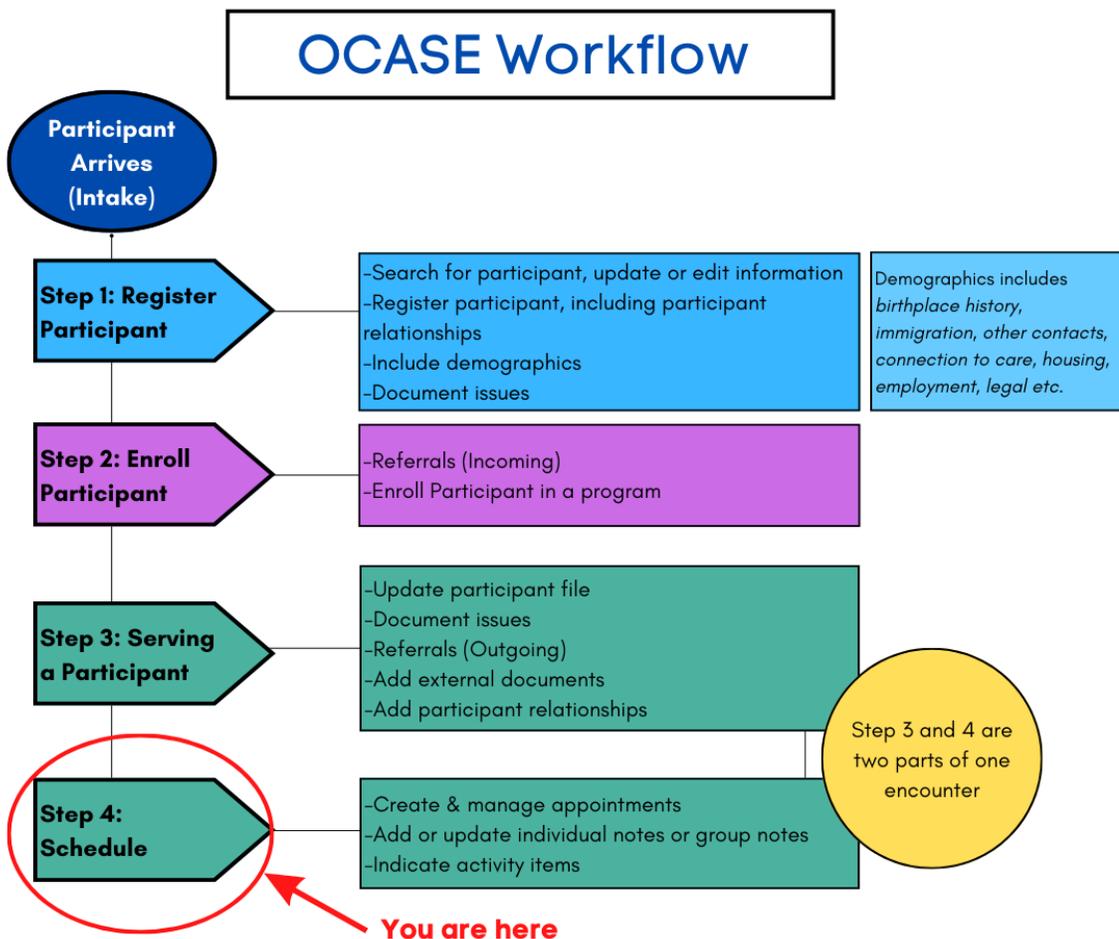
Schedule

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:

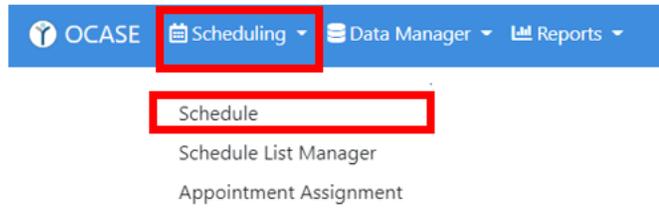
- Review the OCASE Training video [Schedule-Add Appointments](#)
- Review the OCASE Training video [Add Individual Note](#)
- Review the OCASE Training video [Add an Activity](#) – **always required to add at least one Activity**

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 showing '04 : 00'), and 'Duration' (time picker showing '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 showing '00 : 00'), 'End Date' (calendar icon and text '06-Jun-2022'), 'End Time' (time picker showing '00 : 00'), 'All Day' (checkbox), 'Recurring' (dropdown menu with 'No' selected), and 'Duration' (time picker showing '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 table, 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

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

The screenshot shows the OCASE Scheduling interface. At the top, there is a navigation bar with 'OCASE', 'Scheduling', 'Data Manager', and 'Reports'. A search bar on the right contains 'Last Name/TREAT #' and a magnifying glass icon. Below the navigation bar, the main heading is 'trainer9 ocase's Schedule'. A toggle switch for 'Hide Cancelled and Entered in Error Appts' is visible. The 'Participants' section is highlighted with a red box and contains a dropdown menu for 'Default Appt Type' set to 'Participant Appointment', a search input field labeled 'Search Last Name / TREAT #' with a magnifying glass icon, and two buttons: 'Add to view' and 'Clear Participants'. To the right of the 'Participants' section is a 'Primary Workers' section with a plus icon.

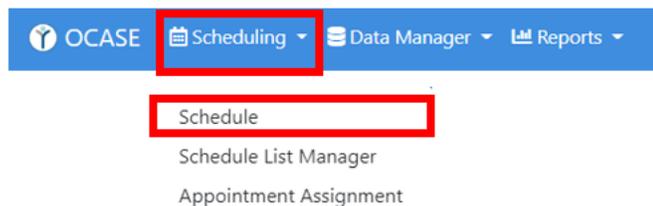
Individual Notes

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.

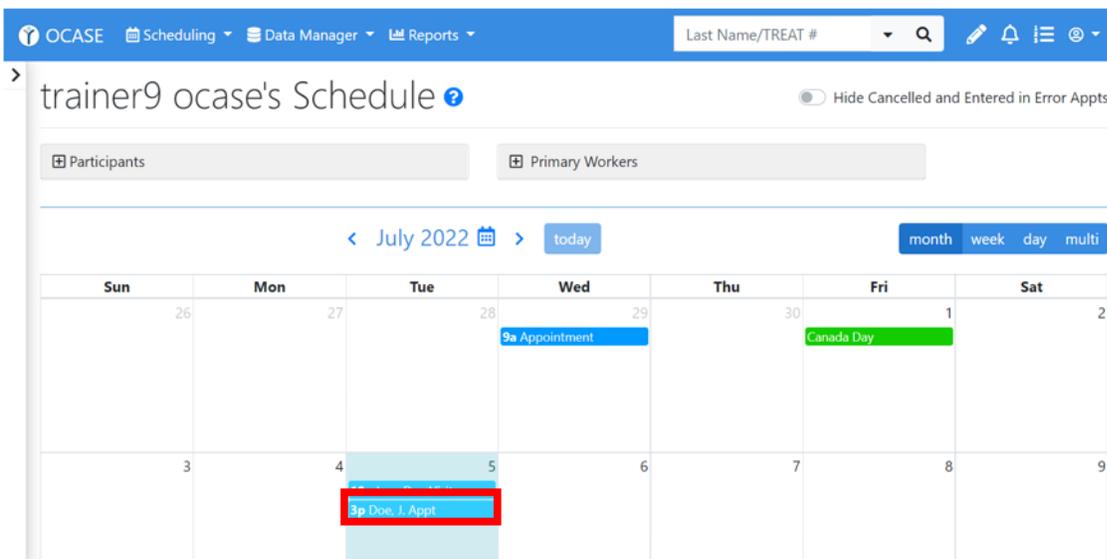
Individual notes pertain to one specific participant at a time. You are also able to view all notes attached to the participant's file

Steps to add an individual note

1. Navigate to your **schedule**



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



Refer to page 22 – Case Notes - [Support Services Resource Guide \(May 2025\)](#)

3. Select **Edit**

View Schedule Entry [Close]

Appointment Type: Participant Appointment
Program: Support Services
Status: Attended
Start Date: 05-Jul-2022 15:00 **End Date:** 05-Jul-2022 15:30
Duration: 00 : 00 : 30
Recurring: No

[Edit]

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

Group Note
Individual Note
Unregistered Note

Cancel Save Save & Select Note Template

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**

When you click the "Sign Note" button you will be placing a note in the following Participant's permanent record:
Participant: **Doe, Jane, MRN 10031**

Under the following username and credentials:
OCASE User: **trainer9 ocase, OCASE**

[View Participant's Chart] [Spell Check] [Delete Note] [Sign Note]

Add an activity (individual)

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

Activities

[+ Add Activity]

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

The screenshot shows the 'Add New Activity' form. At the top, there is a blue header with the title 'Add New Activity' and a close button. Below the header, a light blue banner states 'All required fields are marked with an asterisk *'. The form contains several fields: 'Primary Worker *' with the value 'trainer9 ocase', 'Participant' with 'x Kelly Riff', 'Program *' (highlighted with a red box), 'Comments' with a help icon, 'Activity *' (empty), and 'Units *' (empty). A blue '+ Add Activity' button is located 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 view shows the 'Activity' dropdown menu open. The 'Activity' field is highlighted with a red box. The dropdown list includes: 'comm', 'FOOD-Community kitchen/meal program (FOOD100)' (highlighted in blue), 'VOL-Education & community development (newsletter, kits) (VOL102)', and 'VOL-Serve on board/advisory committee (VOL109)'. The 'Units' field is also highlighted with a red box and is currently empty. A blue '+ Add Activity' button is visible to the right, and a green 'Save' button is below it.

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.

This area cannot be left blank.

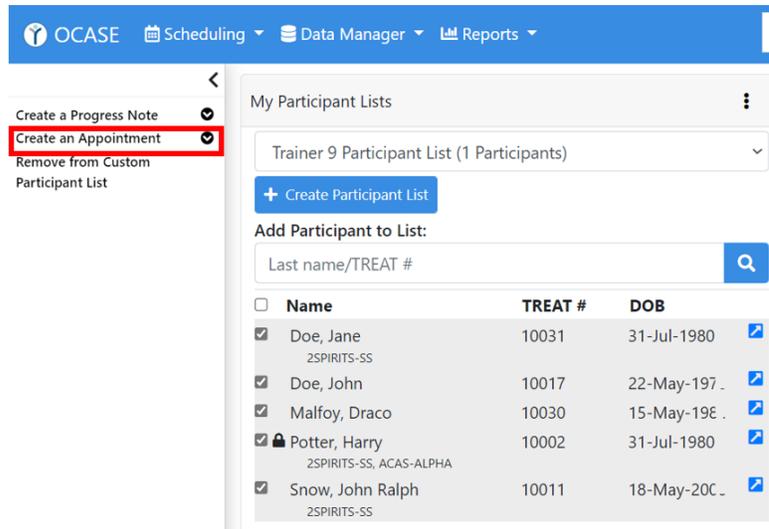
Group Appointment

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*)

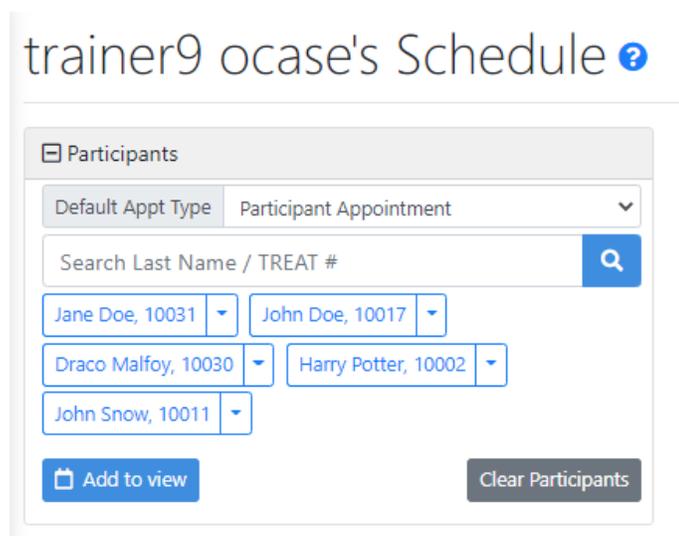
2. Select **Create Appointment** to create a group appointment within your schedule.



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

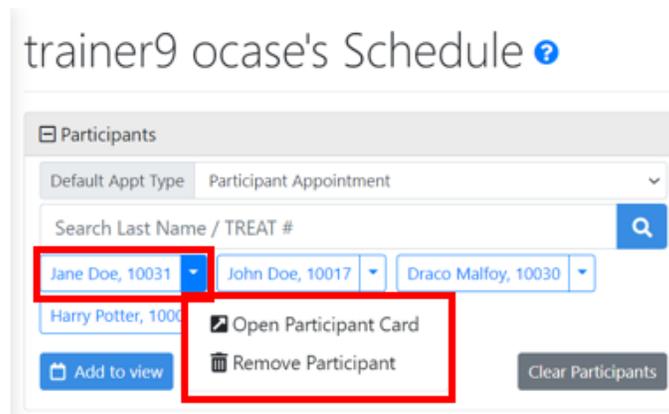
<input type="checkbox"/>	Name	TREAT #	DOB	
<input checked="" type="checkbox"/>	Doe, Jane 2SPIRITS-SS	10031	31-Jul-1980	
<input checked="" type="checkbox"/>	Doe, John	10017	22-May-197	
<input checked="" type="checkbox"/>	Malfoy, Draco	10030	15-May-19E	
<input checked="" type="checkbox"/>	Potter, Harry 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' interface. The 'Participants' section is active. The 'Default Appt Type' is set to 'Participant Appointment'. Below this, there's a search bar labeled 'Search Last Name / TREAT #'. Below the search bar, there are five participant selection buttons: 'Jane Doe, 10031', 'John Doe, 10017', 'Draco Malfoy, 10030', 'Harry Potter, 10002', and 'John Snow, 10011'. At the bottom, there are 'Add to view' and 'Clear Participants' buttons.

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.

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 # ?	
Jane Doe	10031	31-Jul-1980	No Phone #	Add Remove

Add Participant
Last Name / TREAT #

Cancel **Save** Save & Select Note Template

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

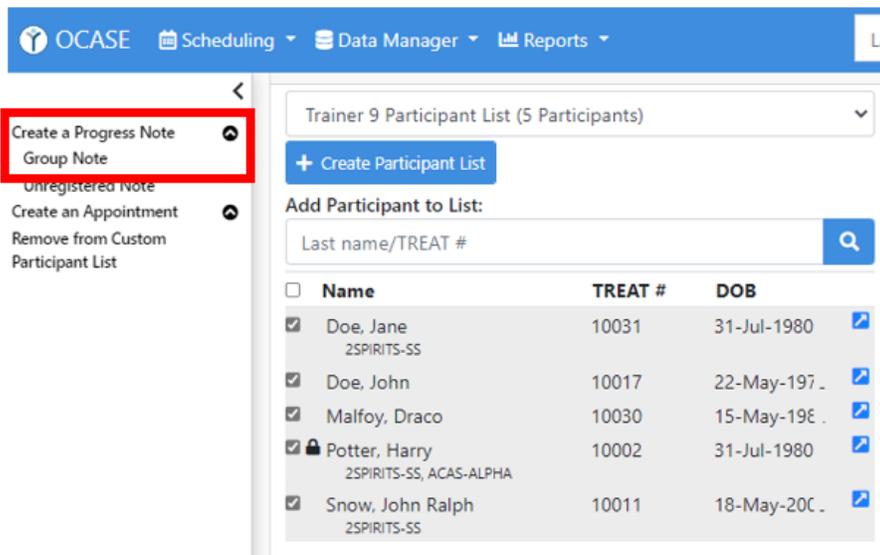
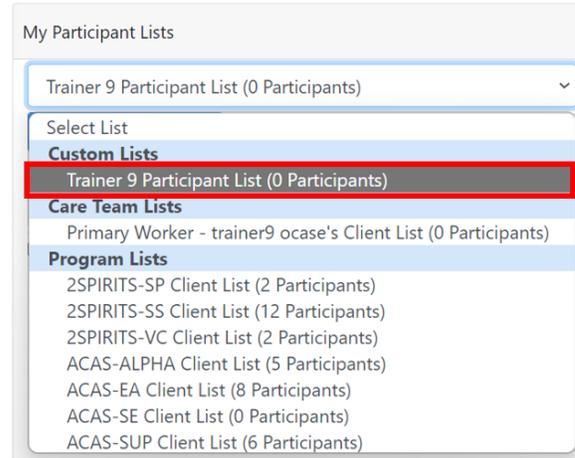
Group (Bulk) Notes

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

Steps to create a group (bulk) note

To create a **Group Note**, you can use one of your 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**

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

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**

The screenshot shows the 'Add New Schedule Entry' form. At the top, a blue header reads 'Add New Schedule Entry'. Below it, a light blue box contains the text '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 '06-Jun-2022'), 'Start Time *' (time picker with '00 : 00'), 'End Date *' (calendar icon and '06-Jun-2022'), 'End Time *' (time picker with '00 : 00'), and an 'All Day' checkbox. The 'Recurring' dropdown menu is highlighted with a red box and set to 'No'. Below this is the 'Duration' field with a time picker set to '00 : 00 : 00'. The 'Participant(s) *' section has a table with columns 'Name', 'TREAT #', 'DOB', and 'Phone # ?'. To the right is an 'Add Participant' button and a search input field labeled 'Last Name / TREAT #' with a search icon. The 'Primary Worker(s) *' section is partially visible at the bottom. At the very bottom, there are three buttons: 'Cancel', 'Save', and 'Save & Select Note Template'.

Add a Linked Individual Progress Note to an Appointment

Appointment:

- It is correct to only create an Appointment, Add Activity item(s), SAVE. This is complete and correct.
 - Required to Add at least one Activity item
 - 300 character limit in description
 - Can be edited long after it's been entered

- Date can range from past to future
- Possible to change the Status from Attended or Scheduled to
 - Cancelled
 - No Show
 - Re-Scheduled
 - Entered in Error
- This is one Session

Progress Note:

- It is correct to only create a Progress Note, Add Activity item(s), Sign Note. This is complete and correct.
 - Required to Add at least one Activity item
 - No character limits
 - Can be edited up to 72 hours after being Signed – Locked permanently afterwards
 - Date can range from past to current date and time – no further
 - **NOTES CANNOT BE FUTURE DATED OR FUTURE TIMED**
 - If you need to fix something that is locked, you can add a new Note or Add an Appointment
 - This is one Session

Appointment Linked to Individual (Progress) Note:

- It is correct to create an Appointment and then Save & Link to Individual Note. This is not always required. Any one of the methods above can be used.
 - Required to Add at least one Activity item to either the Appointment, to the Note or to Both
 - This is one Session
 - Date range for the Appointment can be past or future
 - Date range the same for Appointment and date range the same for Progress Note
 - However, this means that the ‘save and link to note process’ can only be completed after the session has taken place
 - **NOTES CANNOT BE FUTURE DATED OR FUTURE TIMED**
 - It is incorrect if you do not add at least one Activity item to the combined set of the Appointment/Linked Note
 - **When you use Save & Link to Individual Note – do not break the link by selecting an Enrollment program radio button – see image below.**
 - **The very next step is to scroll down and type the Note**
 - The Note will be linked to the Program selected when creating the Appointment
 - The Appointment assigns an Encounter Number that is unique to the Appointment and the Linked Note – *see image below, Encounter Number encircled in green.*
 - If you select an Enrollment program, then this breaks the link between the Appointment Encounter Number and the Note
 - In other words, as long as you maintain the Link:
 - The Appointment can have an Activity item and the Linked Note can be left without an Activity item
 - The Appointment can be created without an Activity item and the Linked Note will need to have an Activity item
 - In this scenario you can Edit the Appointment, but the Note becomes locked after 72

hours

Recommendation:

- Use the method that allows you enough space to document what you need to for your agency
- Use the method that your agency desires to maintain consistency
- Make sure you always have at least one Activity item
- Enter your data into TREAT within 72 hours of session with individual(s)
- Use the method that takes the least amount of time, while fulfilling your agency's documentation requirements

Test MIDDLE ZZTest, 1
ACC-COOK_CIR (Hinext Support), PWA-ESS_MKT (OHTN Carlos Joseph), PWA-INC_SUP (OHTN Carlos Joseph), PWA-PEER_VOL (Hinext Support)

Add New Individual Note

Save & Link To Individual Note All required fields are marked with an asterisk *

Note Details

Note Type
Individual Note

Does this progress note require interaction date and time?
 Yes No

Interaction Start Date *
29-May-2024

Interaction Start Time *
13 : 00

Interaction End Date *
29-May-2024

Interaction End Time *
14 : 00

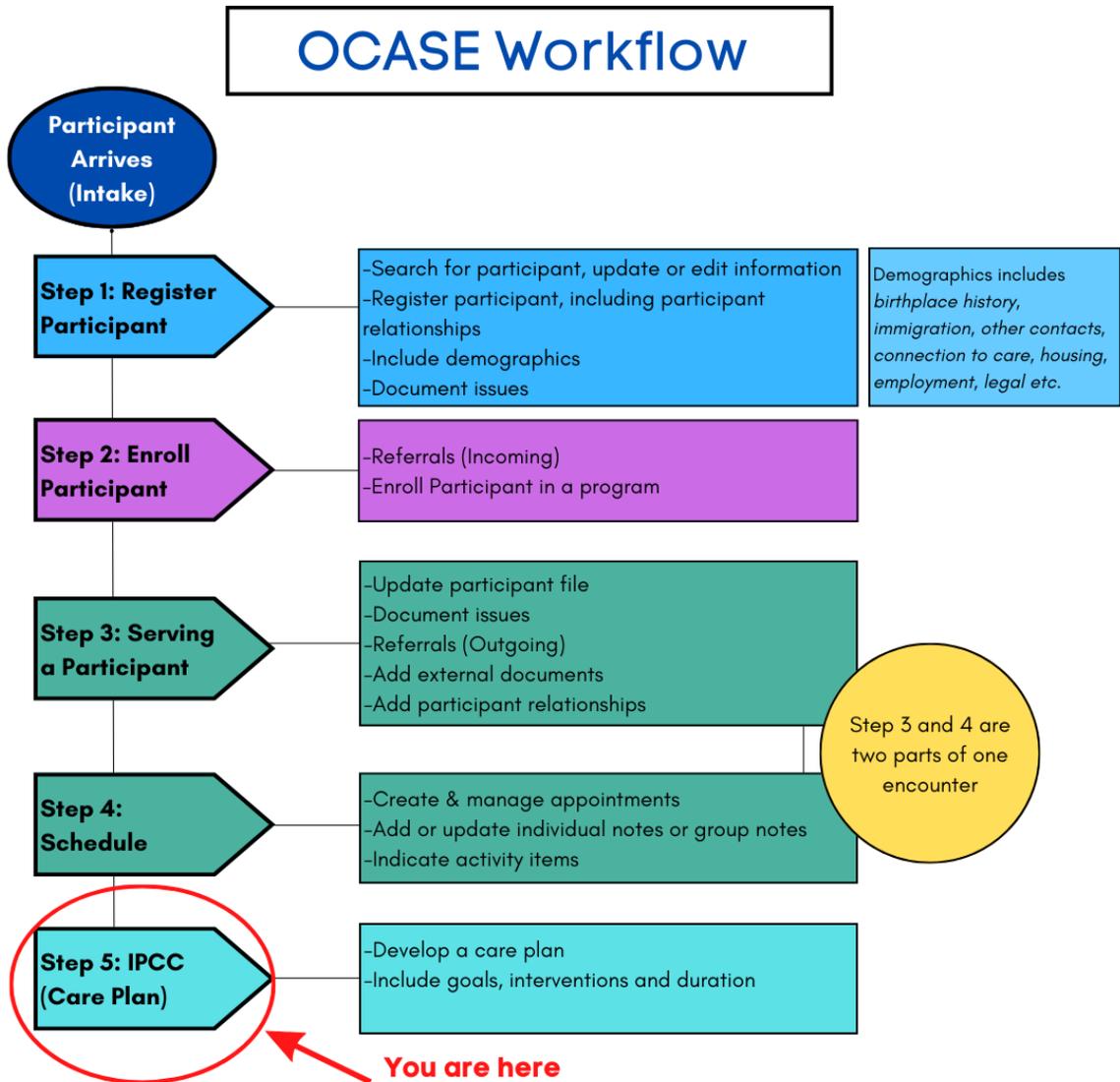
Choose Encounter (ensure you have a valid encounter to the correct program prior to documenting): *

Currently Selected: 0000458976

Select	Program	Encounter #	Start Date	End Date	Status	Visit Type
<input type="radio"/>	PWA-ESS_MKT	0000452631	01-May-2024	--	Admitted	Enrollment
<input type="radio"/>	PWA-INC_SUP	0000439168	01-Jan-2024	--	Admitted	Enrollment
<input type="radio"/>	ACC-COOK_CIR	0000318427	07-Feb-2023	--	Admitted	Enrollment
<input type="radio"/>	PWA-PEER_VOL	0000134380	01-Apr-2022	--	Admitted	Enrollment

IPCC- Create a Care Plan - optional

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.

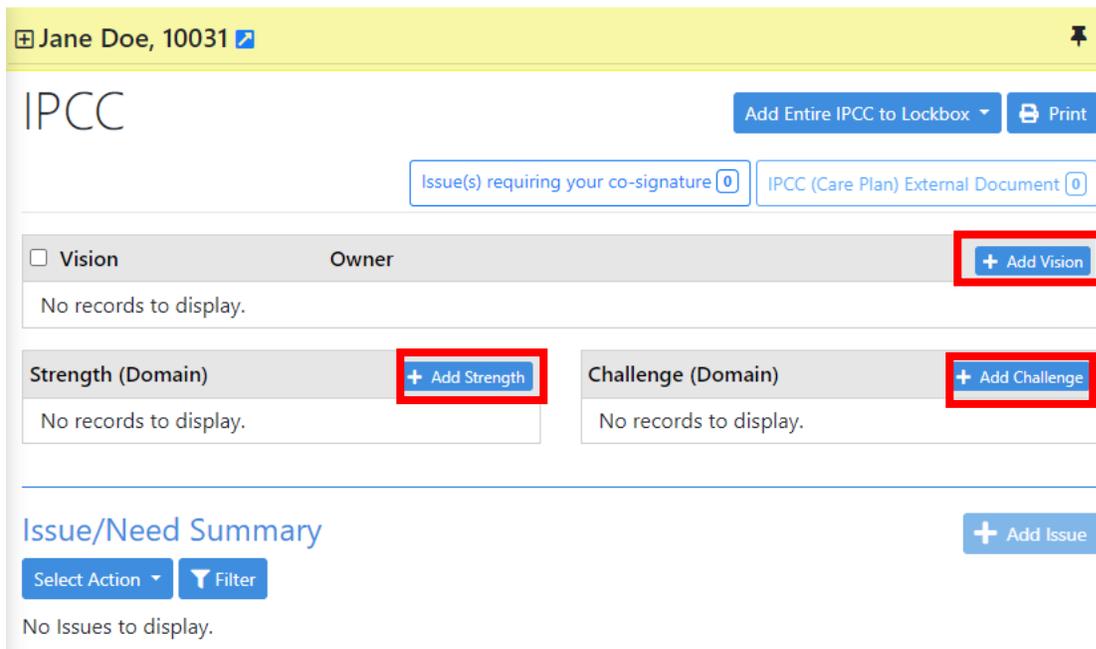
Steps to create an IPCC

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

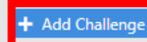
IPCC

Add Entire IPCC to Lockbox   Print

Issue(s) requiring your co-signature **0** IPCC (Care Plan) External Document **0**

Vision Owner 

No records to display.

Strength (Domain)  **Challenge (Domain)** 

No records to display. No records to display.

Issue/Need Summary

Select Action   Filter 

No Issues to display.

Presenting Issue/Need - mandatory

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 Issue Status, Primary Worker Priority and Participant Priority, Select **Save**.
3. Repeat Steps 1 and 2 to add each Issue, one-by-one.

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

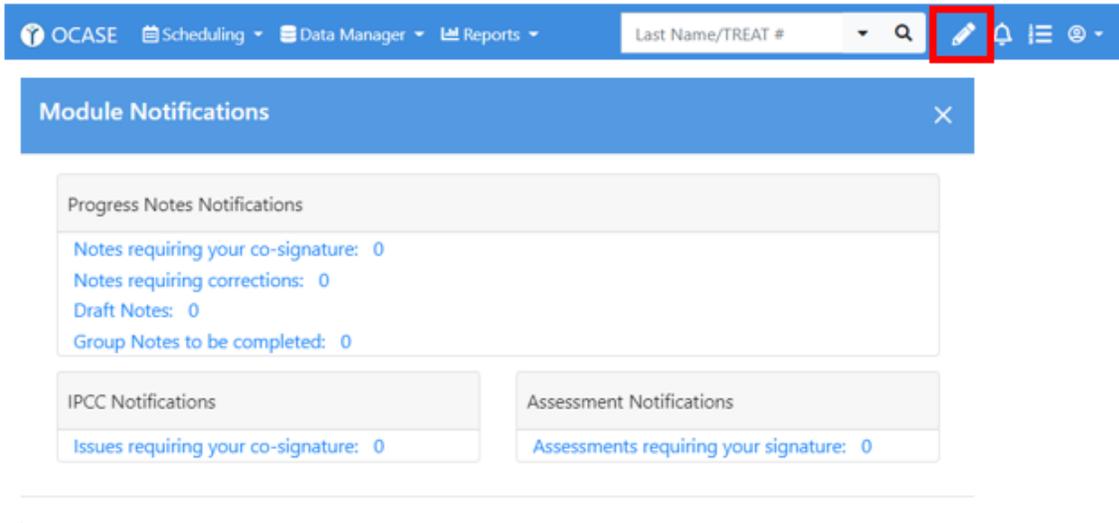
Domain *

<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)		

Refer to page 36 – Presented Issues Data Elements - [Support Services Resource Guide \(May 2025\)](#)

Notifications

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



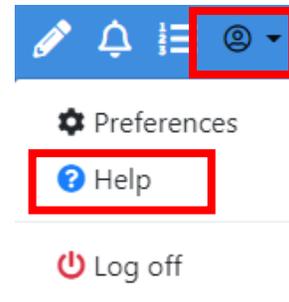
The screenshot shows the top navigation bar of the OCASE system. It includes the OCASE logo, navigation menus for 'Scheduling', 'Data Manager', and 'Reports', a search field for 'Last Name/TREAT #', and a pencil icon highlighted with a red box. Below the navigation bar is a 'Module Notifications' pop-up window. This window is divided into three sections: 'Progress Notes Notifications' (with sub-items: Notes requiring your co-signature: 0, Notes requiring corrections: 0, Draft Notes: 0, Group Notes to be completed: 0), 'IPCC Notifications' (with sub-item: Issues requiring your co-signature: 0), and 'Assessment Notifications' (with sub-item: 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**



The screenshot shows the user options menu in the OCASE system. It includes icons for a pencil, a bell, a hamburger menu, and a user profile icon highlighted with a red box. Below the user profile icon are three options: 'Preferences' (with a gear icon), 'Help' (with a question mark icon and highlighted with a red box), and 'Log off' (with a power icon).

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 \(ohfn.freshdesk.com\)](https://ohfn.freshdesk.com)

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

[OCASE TREAT Training Videos - YouTube](https://www.youtube.com)

[OCASE Resources & Training – The Ontario HIV Treatment Network \(ohfn.on.ca\)](https://ohfn.on.ca)

[Support Services Resource Guide \(May 2025\)](#) – *The Resource Guide explains and defines the Core Program Areas for Support Services, OCASE data collection requirements, agency data entry protocols and other accountability requirements.*

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

Refer to page 36 – Presented Issues Data Elements - [Support Services Resource Guide \(May 2025\)](#)

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

Refer to page 23 – Referrals - [Support Services Resource Guide \(May 2025\)](#)

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
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-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

Refer to page 44 – Standard List of Service Activity Items - [Support Services Resource Guide \(May 2025\)](#)

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	Profile

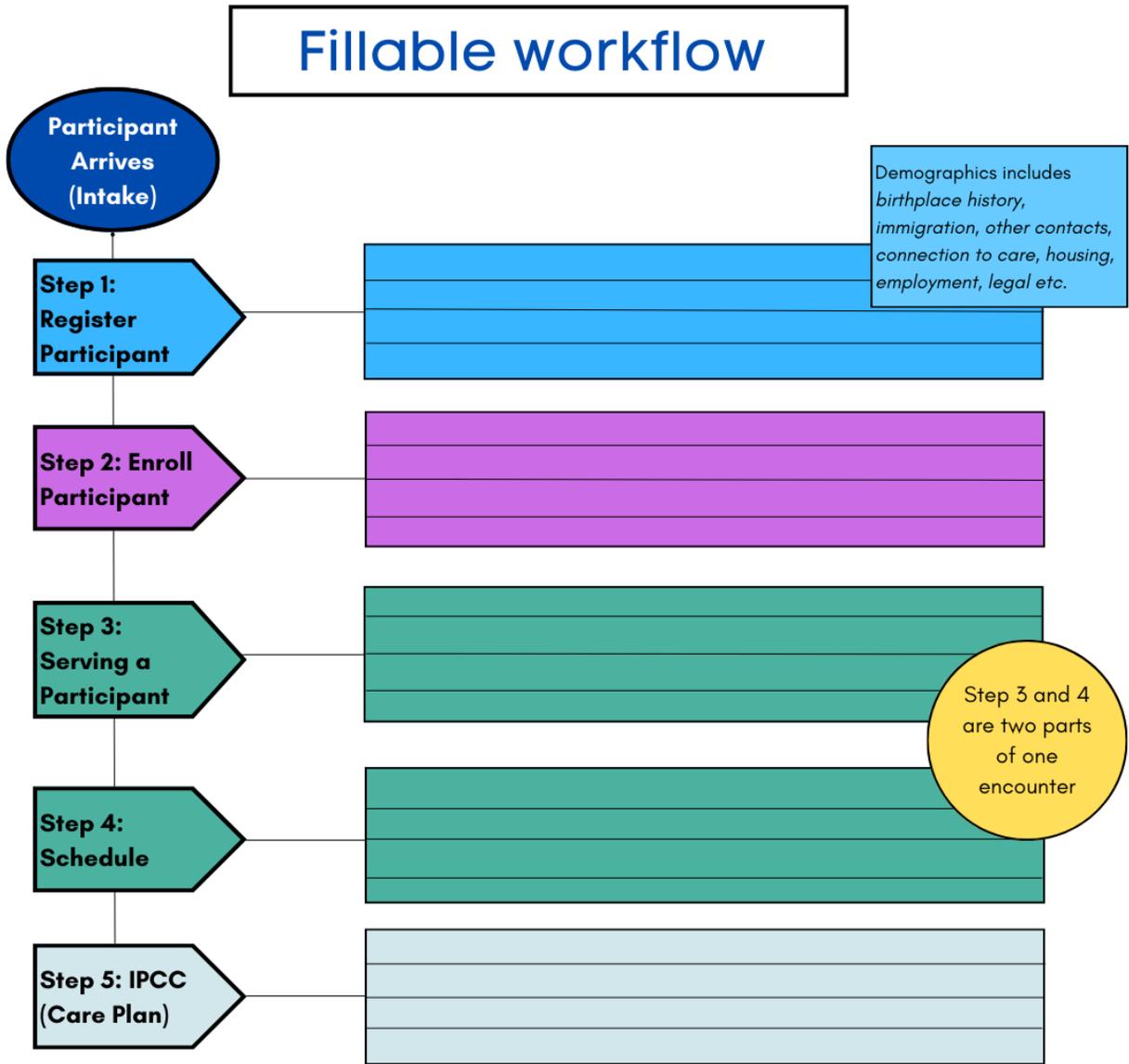
a. Demographics @ Intake	
<ul style="list-style-type: none"> a. Collateral Contact Type b. HIV specialist - Name and contact Family physician - Name and contact Client Engagement-Baseline Information <ul style="list-style-type: none"> c. Immigration Status 	Client Profile tab <ul style="list-style-type: none"> a. Emergency Contact b. Contact c. Birthplace History
Additional Client Information <ul style="list-style-type: none"> a. HIV/Hepatitis C Status b. Accessibility Information c. Current medications 	Medical tab <ul style="list-style-type: none"> a. Connection to Care b. Hospitalizations or ER Visits c. Medication and Allergies
<u>Client Engagement</u> Housing Situation	Housing tab
Employment status	Employment tab
[custom]	Legal tab
Safety Concerns	Safety Concerns to Others tab
<ul style="list-style-type: none"> a. Individual Notes Intake Summary 	Notes <ul style="list-style-type: none"> a. Individual Note
Intake Process	Enrollment -Enroll in a program
Client Demographics Intake <ul style="list-style-type: none"> a. Referral Source By Category b. Referral Source Contact Information 	Referrals <ul style="list-style-type: none"> 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 <ul style="list-style-type: none"> a. Progress Note Individual Note
Groups <ul style="list-style-type: none"> a. Informal Series/Group List b. Informal Event/Group Event c. Roster (Expected or Registered Attendees) 	Groups <ul style="list-style-type: none"> a. Program b. Group Activities c. Members (Participants)
Presenting Issues	IPCC (Interdisciplinary Plan Client Care)
<ul style="list-style-type: none"> a. External Referrals b. Agency Details 	Referrals (Outgoing) tab <ul style="list-style-type: none"> a. Current issue b. Issue detail

Pre-enrollment	Waitlist
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Priority Populations – Definitions and Data Requirements

Data Element	Definitions	Additional information	Required demographic data
People living with HIV	People living with HIV/AIDS (includes cis and trans men and women)	People who are HIV Positive. Would also include people who are co-infected with HIV (Hep C or Hep B).	Calculated from Client Group and HIV/Hepatitis Status
Gay/bisexual/MSM	Gay men, bisexual men and other men who have sex with men, including trans men	Trans men are persons assigned “female” at birth who identify as men. Note: women who are bisexual or lesbians are not included in this priority population.	Calculated from Sex/Gender and from Sexual Orientation
ACB communities	African, Caribbean and Black communities (includes cis and trans men and women)	Black Ontarians and people from Africa and the Caribbean.	Calculated from Ethnic Group
Indigenous peoples	Indigenous peoples (includes cis and trans men and women)	Includes First Nations, Inuit or Métis peoples.	Calculated from Ethnic Group
People who use drugs	People who use drugs (includes cis and trans men and women)	People who ' <i>disclose</i> ' that they inject, inhale or smoke substances.	Calculated from IPCC - Client disclosed injecting or inhaling substance(s)

<p>Women*</p>	<p>Women*; Note: If a woman is living with HIV she is not considered an at-risk woman</p>	<p>Women* (cis and trans women, including women who are members of the other priority populations at highest risk, and other women who face systemic and social inequities, and are more likely to be exposed to HIV through a sexual or drug using partner). Trans women are persons assigned “male” at birth who identify as women.</p>	<p>Calculated from Sex/Gender [and can include Ethnic Group, Client disclosing their use of drugs and HIV/Hepatitis Status]</p>
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VII. Activity Units Time Conversion

NEW: when recording a Volunteer's (Peer's) hours doing administrative work, you will record one hour as 1 unit.

- **Volunteer/peer hours (units in TREAT) are then summed up and reported to the Ministry of Health (MOH)**

Your agency can decide to track the number of units for specific Activity Items. This will enable you to get reports with the detailed information that your need.

- Service Activity units in TREAT are summed up only for your agency's benefit. These details do not get reported to the Ministry of Health (MOH)

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 into 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**



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, or to restrict access to the Lockbox. Select **Save**.

Partial Lockbox

- Lockboxes can be Edited or Deleted by the creator
- More than one Partial Lockbox can be added to a TREAT ID and each of them can have different Access Controls which apply to any User or Users
- Partial Lockboxes are used to restrict or allow access to Progress Notes, IPCC and External Documents
- As mentioned above, profile tabs can be hidden from specific using by changing their Permissions
- Demographics can be viewed by any user

Full Lockbox

- Lockboxes can be Edited or Deleted by the creator
- Full Lockbox will allow restricted users just to find the participant, their TREAT ID and their date of birth details, nothing else (keep in mind that DOB details can provide an estimated year of birth 01/01 or unknown with 1900/01/01)
- Limited to one Full Lockbox for each TREAT ID; partial Lockboxes can also exist along with the Full Lockbox

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

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 lockbox.

Users

Search for user by username

Cancel 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

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

- 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	Edit

- 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

+ Add 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	ZSPIRITS-SS	Progress Note	trainer9 ocase	13-Jan-2023 09:00:00 AM		

7. Edit or Delete Lockbox at any time

Jane Doe, 10031

Lockboxes

Add Lockbox

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"/> Edit
<input type="checkbox"/>	11-Jan-2023 01:41:01 PM		Group Note	2SPIRITS-VC		trainer9 ocase	11-Jan-2023 09:00:00 AM		

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.

Click directly on the lock icon and you will see the lockbox settings:

Client Lockboxes

Bill Toy, 10140 ✕

Title	Type	Access	Affected Users	Last Modified
18-Jun-2025 01:10:47 PM	Full Lock on Client	Not permitted	trainer4 ocase	18-Jun-2025 01:11:25 PM
18-Jun-2025 01:12:17 PM	Partial Lock	Permitted	trainer2 ocase	18-Jun-2025 01:14:57 PM

X. Restrict External Document Access

To restrict access to a confidential document, follow these steps:

1. **Select External Documents** 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 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**.

Add External Document

All required fields are marked with an asterisk *

Current Document *
[No file selected] **Select Document**

Document Date * <input type="text"/>	Description <input type="text"/>
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

Exception Types, Descriptions & How to Fix Them

Identifying Exceptions gives you an opportunity to understand when they happen. We send a report to you each month to address inaccurate data that requires your verification and to adjust and take corrective action to enter any missing data. All of this is primarily for the purpose of consistent and accurate OCHART reporting to the Ministry of Health and secondarily for your own agency's ad hoc reporting (i.e., reports requested for a particular purpose). The Exception reports that you receive from us are for Exceptions which were automatically identified when we scanned your data covering the current reporting period. Other Exceptions, such as the duplication of a client in TREAT will need to be manually identified by you at the agency.

Worksheet Name	Exception Type	Worksheet Header	Exception Title	Instructions – How to Fix Exception
AtRiskAffDxPos	At-risk/affected client with positive HIV diagnosis	At-risk or Affected Clients who are HIV and/or Hepatitis Positive.	HIV/Hepatitis Status (HIV positive, HIV/HCV co-infected, or HIV/HBV co-infected) does not correspond to the client group (At-risk, Affected).	Please verify and edit either the Demographics, Client Group or edit the Profile, Medical tab, Connection to care, HIV/Hepatitis Status
AtRiskAffDxYear	At-risk/affected client with HIV diagnosis year	At-risk or Affected Individuals with HIV Diagnosis Year.	Year of HIV diagnosis is filled in for the client group (At-risk, Affected).	Please verify and edit either the Demographics, Client Group or edit the Profile, Medical tab, Connection to care, Year of HIV Diagnosis
AtRiskAffHIVSpecialist	At-risk/affected client with HIV specialist	At-risk or Affected Individuals with an HIV Specialist.	HIV Specialist is listed as Yes for the client group (At-risk, Affected)	Please verify and edit either the Demographics, Client Group or edit the Profile, Medical tab, Connection to care, Do you have an HIV specialist?
AtRiskAffMed	At-risk/affected client with HIV medication	At-risk or Affected Individuals with HIV Medication.	HIV Medication is listed as Yes for the client group (At-risk, Affected)	Please verify and edit either the Demographics, Client Group or edit the Profile, Medical tab, Connection to care, Are you taking HIV medications?

Worksheet Name	Exception Type	Worksheet Header	Exception Title	Instructions – How to Fix Exception
DeceasedWithPrograms	Deceased with programs	Deceased Clients with an Existing Program	Enrollment status in the program is still Open for Deceased Clients	<p>If the client is not Deceased, then Edit Demographic screen and clear “Known Date of Death?” and choose ‘Select One’ instead, and /or also clear Deceased? field and choose ‘Select One’ instead. Save.</p> <p>If the client is Deceased, then update Demographic screen “Known Date of Death?” with either <Known, Unknown, Estimate> and “Deceased?” <enter date>. Save.</p> <p>Exception created when Demographic screen is updated without completing the Steps to discharge a participant from a program(s).</p> <ol style="list-style-type: none"> 1. While in the participant file, then select Encounters from the Navigation Panel 2. Under Encounters, you will see the list of all program enrollments (Visit Type = Enrollment), a participant has been in and been discharged from. 3. Select Edit for the Enrolled program (i.e., without discharge) they were previously Admitted to. This is where you

Worksheet Name	Exception Type	Worksheet Header	Exception Title	Instructions – How to Fix Exception
				want to discharge (close) the participant from. Input the updated enrollment status, the end date and reason for the discharge. Save. Do this for each (all) of the Enrolled programs. <i>Refer to page 18 of the User Guide</i>
DemoDOBGt95	Date of birth (>95 years old)	Demographic Date of Birth Exception	Client Age is greater than 95 years old.	Please verify and enter an 'Estimate' of the client's truer age, using 01-Jan-???? (where ???? would be an approximate year of birth to calculate their approximate age)
DemoNotFemale Lesbian	Demo - lesbian but not female or trans women	Demographic Sex/Gender Exceptions	Sexual orientation is listed as Lesbian but sex/gender is not Female or Trans woman or Not Listed	Please verify and edit either the Demographics, Sex/Gender or edit the Demographics, Sexual Orientation
DemoNotMaleGay	Demo - gay but not male or trans man	Demographic Sex/Gender Exceptions	Sexual orientation is listed as Gay but sex/gender is not Male or Trans man or Not Listed	Please verify and edit either the Demographics, Sex/Gender or edit the Demographics, Sexual Orientation
DemoSexOrientationMissing	Demo - missing orientation for male/trans man	Demographic Sex/Gender Exceptions	Sexual orientation is Missing where sex/gender is Male or Trans man	Please verify and edit either the Demographics, Sex/Gender or edit the Demographics, Sexual Orientation. Reason: Male and Trans man who are Gay, Queer, Bisexual, Two-Spirited are a Priority Population.
IPCCMissing	IPCC missing (no relationships)	Clients with Missing IPCC Data.	This exception report shows clients that do not have at least one Presenting Issue under IPCC	Presenting Issue(s) need to be identified for clients (participants, community members) who are New to your agency and Enrolled in a Program during the current reporting period.

Worksheet Name	Exception Type	Worksheet Header	Exception Title	Instructions – How to Fix Exception
				<p>Note: The community member or client must have a TREAT ID and they must be Enrolled in at least one Program at your agency. IPCC can only be added after Enrollment.</p> <p>a) Next, while in their TREAT file, navigate to IPCC and click +Add Issue, fill details and Save – a minimum of one issue is required</p> <p>b) Add more issues if needed, one-by-one, click +Add Issue, fill details and Save</p> <p>c) YouTube Video #13 OCASE TREAT Add Issues (IPCC)</p>
PHAConnToCare NIL	PHA - connection to care NIL details (no connection to care widget create date)	PHA Clients with Missing Connection to Care data.	This exception report displays clients who have no information in the connection to care widget (i.e., connection to care information is missing)	Please verify and edit either the Demographics, Client Group or +Add New to the Profile, Medical tab, Connection to care.
PHAConnToCare NoMed	PHA - connection to care no medications	Connection to Care: PHA Clients with no Medications.	This exception report displays clients who are not on HIV medications.	Edit the Profile, Medical tab, Connection to care, Are you taking HIV medications?
PHAConnToCare NoSpecPhys	PHA - connection to care no specialist and no primary care physician	Connection to Care: PHA Clients with no specialist or primary care physician.	This exception report displays clients who have no specialist and no primary care physician.	Action is required by the agency to get the client connected to care.
PHADxNegative	PHA - no HIV diagnosis	Connection to Care: PHA Clients who are HIV Negative	HIV/Hepatitis Status (HIV negative, HCV positive, HCV/HBV co-infection, unknown,	Please verify and edit either the Demographics, Client Group or +Add New to the Profile, Medical tab, Connection

Worksheet Name	Exception Type	Worksheet Header	Exception Title	Instructions – How to Fix Exception
			unreported) does not correspond to the client group (PHA).	to care, HIV/Hepatitis Status
PHADxYear	PHA - diagnosis year missing, dx year before DOB, dx year after current year, dx year before 1981	Connection to Care: HIV Diagnosis Date Exceptions for PHA Clients	This exception reports displays clients who have: Diagnosis year missing (DxYearMissing = 1), Diagnosis year before 1981 (DxYearBefore1981 = 1), Diagnosis year is greater than the current year (DxYearCurrentYear = 1), Diagnosis year is less than the year of birth (DxYearYOB = 1)	Please verify and edit or +Add New to the Profile, Medical tab, Connection to care, Year of HIV Diagnosis
PHAEmpNoMed Coverage	PHA - employment widget has no medication coverage	PHA Clients with out Medication Coverage	As indicated in the ' Employment' widget. Medication coverage = None	Please verify that your client's file has information about their Medication coverage. This enables you to provide support. Edit or +Add New to the Profile, Employment tab, Employment, Medication coverage
PNSchedulernotakeNoCoord	Intake from prog note/scheduler	New clients without any Intake or Service Coordination Activities.	Clients have no Activity of the type Intake or Service Coordination listed in either their Progress notes or Visits.	Consider whether you've added these Activity Items which are frequently overlooked, one or more than one: a) Intake (INTAKE-) b) Service Coordination (COORD-) Note: Appointments (individual or group) do not get locked. If you need to go back and fix one of them, search your schedule for the appointment or go

Worksheet Name	Exception Type	Worksheet Header	Exception Title	Instructions – How to Fix Exception
				<p>directly to the client’s schedule and Edit the scheduled entry, using one of the two methods below:</p> <p>a) While in Edit mode, scroll to the bottom and Expand Activity details Section (and scroll down) to reveal existing Activity items. Click Edit to add or remove more of them, one-by-one.</p> <p>b) While in Edit mode, scroll to the bottom and click +Add Activity if no items have been added before. Proceed to type to add each Activity Item, one-by-one.</p> <p>Additional note: Individual Progress Notes are locked after 72 hours. The easiest way to fix this would be to create an Individual appointment (backdated or you can edit an existing Individual appointment, they do not lock) with a date within the current reporting period (starting April 1 OR starting October 1). Add all of the items which were not added originally, one-by-one.</p>
VisitNoActivity	Missing activities	Visits with no Activities listed.	This exception report lists Clients who have had Attended and Scheduled Visits with no activities.	Go back and look at each of the Individual or Group Appointments and Edit them to add Activities.

Worksheet Name	Exception Type	Worksheet Header	Exception Title	Instructions – How to Fix Exception
VisitNoParticipants	Activities missing participants	Visits with No Participants	This exception report lists Appointments that do not have any Participants in the Activity area.	<p>To resolve this Exception, you can either:</p> <ol style="list-style-type: none"> 1) Edit the Appointment, Scroll down to the bottom, Expand (+) the Activities - details area and scroll down, Click Edit and in the Participant(s) field begin typing the Participant's First or Last Name, Select it, Click Save, Click Save again. - OR - 2) Edit the Appointment, Change the Status to either Cancelled, No-Show, Re-Scheduled or Entered in Error and then click Save <p>Important: Do not change the Program in either field to fix this Exception. If it is the incorrect Program then change the Status to Entered in Error, Save and then add a new Appointment correctly.</p>
VisitPgmNoEnrollment	Programs with visits but no enrollment	Visits with no Enrollment in the corresponding Program	This exception report lists Clients who have had Visits Scheduled under a program, but no enrollment record exists for the corresponding programs.	<p>Clients must first be enrolled in a program(s) before scheduling a Visit under the program(s).</p> <p>Note: I don't expect us to have any of these because an Enrollment is required for any IPCC or Session Activity to be entered</p>