Getting Started (CTS)

NEO360 - CTS Module Training Module

NEO360 is a web application used to log data concerning an agency's harm reduction programs. This CTS module is used specifically to log data concerning an agency's Consumption and Treatment program. Staff who administer the CTS program will be responsible for keeping track of their work using NEO.

The following training module will instruct you on how to use the CTS module of the NEO application to log your CTS activities. At the end of this module, you will have 2-3 exercises to help you practice what you've learned. **Completing this training should take you roughly 1 hour.**

Throughout the following training pages, video instructions will be provided alongside written materials. **Video instructions and written materials contain the exact same content, so please feel free to consume the training in whichever format you prefer.**

Login to the TEST environment

Go to https://test.onhrdb.ca/Secure/

Log in using the username and password provide by your Site Manager.
We recommend you follow along in NEO as you go through this module!

This website is only used for testing and training - so feel free to play around! You will be given access to a different website to log your actual day-to-day work.

Let's get started!

- Record a Transaction
- Reports Training

Record a Transaction (CTS)

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Record a Transaction

In the CTS module in NEO360, every interaction with a client is called a **transaction** (your agency may refer to these as "contacts," "visits," or "encounters"). During a single transaction, a client may provide you with information about their demographics, clinical history, and overdose history. The client may also receive harm reduction or wrap around services. All of this information can be recorded on the CTS module in NEO360.

The following pages will show you how to log these activities in NEO360. Try following along in the **TEST** environment!

- Add a Client (CTS)
- Client Details Screen (CTS)
- CTS Home Screen (CTS)
- Exercises (CTS)

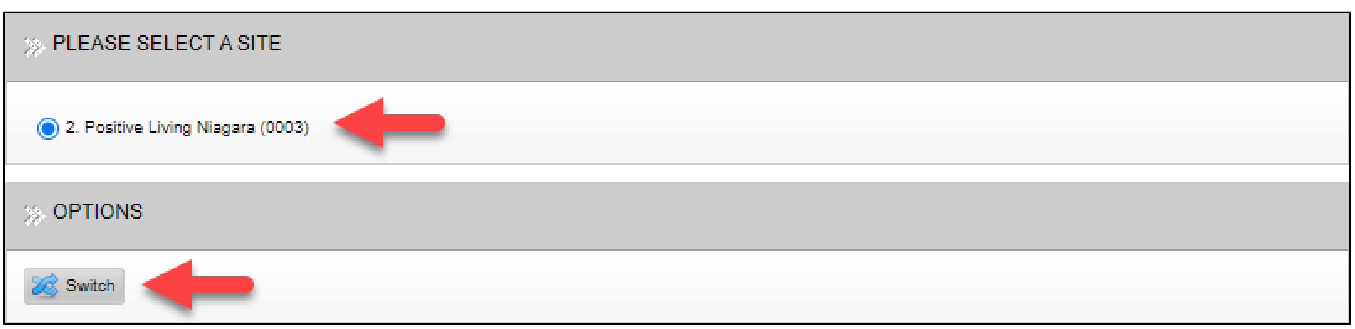
CTS Transaction Module

Video Instructions:

Once you're logged into the **TEST environment**, you will need to access the CTS module. To access the CTS module, click **CTS** from the main menu.

Select a Site

Under the "Please Select a Site" section, select your site, then click **SWITCH** under the "Options" section.



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Add a Client (CTS)

Add a Client (CTS)

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Record a Transaction (CTS)

Client Details Screen (CTS)

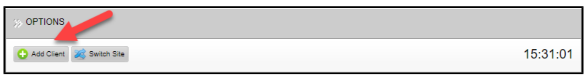
Add a Client

Video Instructions:

The first step to record a transaction in the CTS module is adding a client. The client reference code that is used to add the client will be used to track that particular client throughout their CTS visit.

All client transactions require a client reference code.

To add a client to the CTS module, click on the **ADD CLIENT** button. Clicking on this button will bring you to the Client Search screen.



Transaction date & time

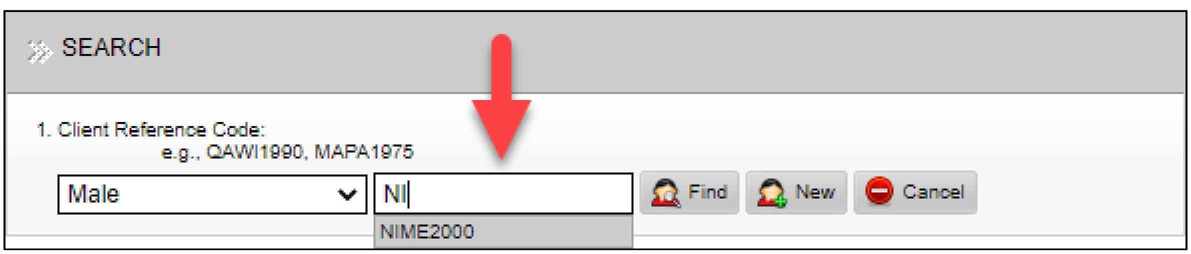
Client transactions are recorded one at a time. The CTS module automatically records the **Transaction Date** and **Transaction Time**.

Client reference code

The next step is to enter the **client's reference code.**

Find an existing client reference code

A returning client may know their code and simply give it to you when asked during the transaction. In order to find an existing code, you must select the client's **gender**. Then, begin typing in the **four initials**, as you type you should see existing client reference codes appear, as below. If you see the code you're looking for, select it and then click on the **FIND** button. Clicking on the **FIND** button should bring you straight to the **Client's Detail Screen**. Otherwise, you must create a new client reference for the client.



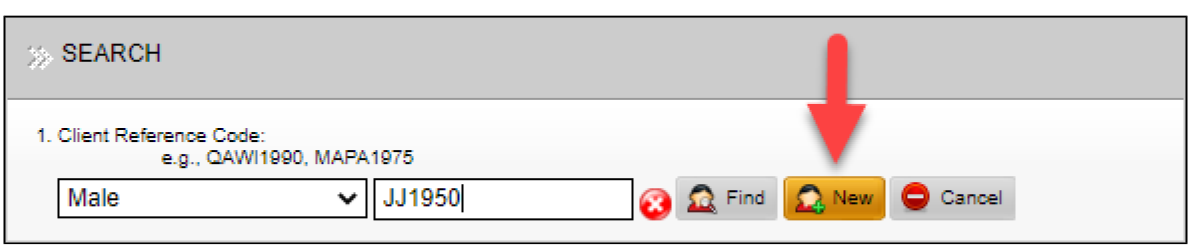
Create a new client reference code

If the client is new or not sure what their code is, ask them whether you can create a code for them.

To create a code you need:

- The client's **gender**;
- **Four initials** from the client's first or last name (try to choose something they will remember!); and
- The client's **year of birth**.

Your agency may have more exact instructions regarding how to choose the **four initials**; for example: "Ask for the first two letters of the client's first name, and the last two letters of the client's last name." To create a new client select the **gender** from the drop down menu, and then type in the **four initials** and the **year of birth** all together, and then click the **NEW** button.



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Client Details Screen (CTS)

Client Details Screen (CTS)

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CTS Home Screen (CTS)

Client Details Screen

Video Instructions:

The CTS module collects very detailed information about individual clients, including demographic details, emergency contact, and clinical and overdose history. For every transaction, you must log /confirm the client details on this screen.

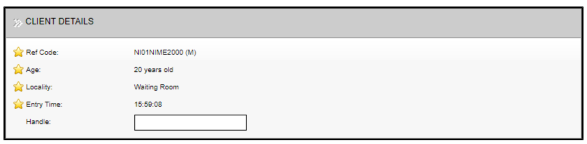
Once you add a client to the CTS module, you will be taken immediately to the **Client Details Screen.**

> The **Client Details Screen** can be accessed and updated throughout the transaction. See **CTS Home Screen** for more information.

Client details

The client's details, including their reference code, age, locality (where they are in the CTS), and entry time are automatically collected by the platform. You can also include the client's handle (nickname you may have for that particular client) to this section using the textbox.

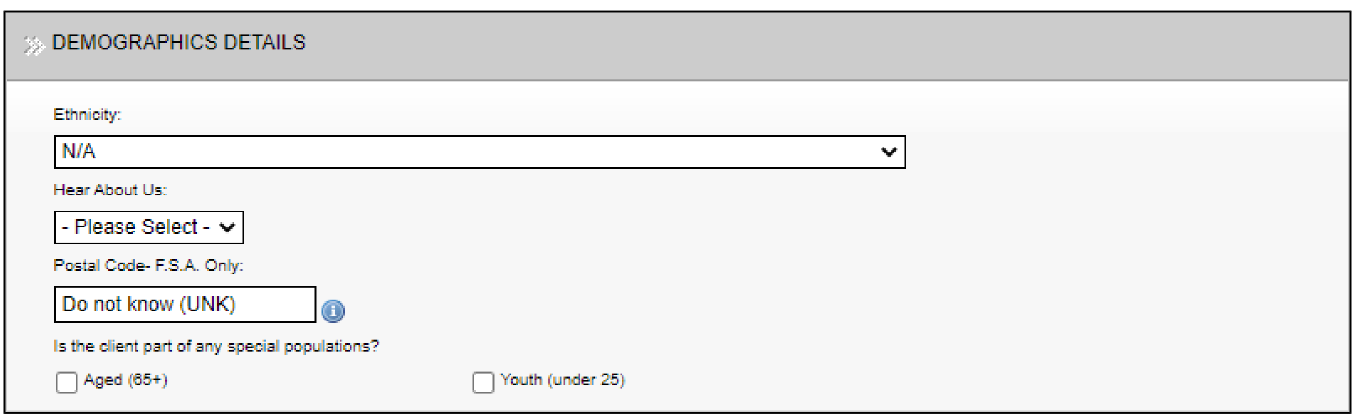
> The client's handle should ***N OT*** include any client protected health information (PHI).



Demographics details

There are four pieces of information that are collected under the "**Demographics details**" section:

1. The client's **ethnicity**;
2. How the client **heard about the CTS site**;
3. The first three characters of the client's **postal code of residence**; and
    - You are encouraged to simply enter "UNK" if you do not have sufficient rapport with the client to ask for this information
    - You can also type "NFA" or "No fixed address" if the client does not have a fixed address
4. If the client is part of a **special population**.



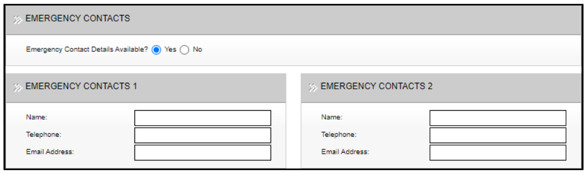
Emergency contacts

If the client has any emergency contacts available, you will want to include their contact information under the "**Emergency Contacts**" section. You are only able to have two emergency contacts for each client at a time.

There are three pieces of information that are collected for emergency contacts:

1. **Name**;
2. **Telephone**; and/or
3. **Email Address**.

> If you select the "Yes" option for the "Emergency Contacts" section, you will need to provide emergency contact information for at least one person to avoid getting an error from the platform.

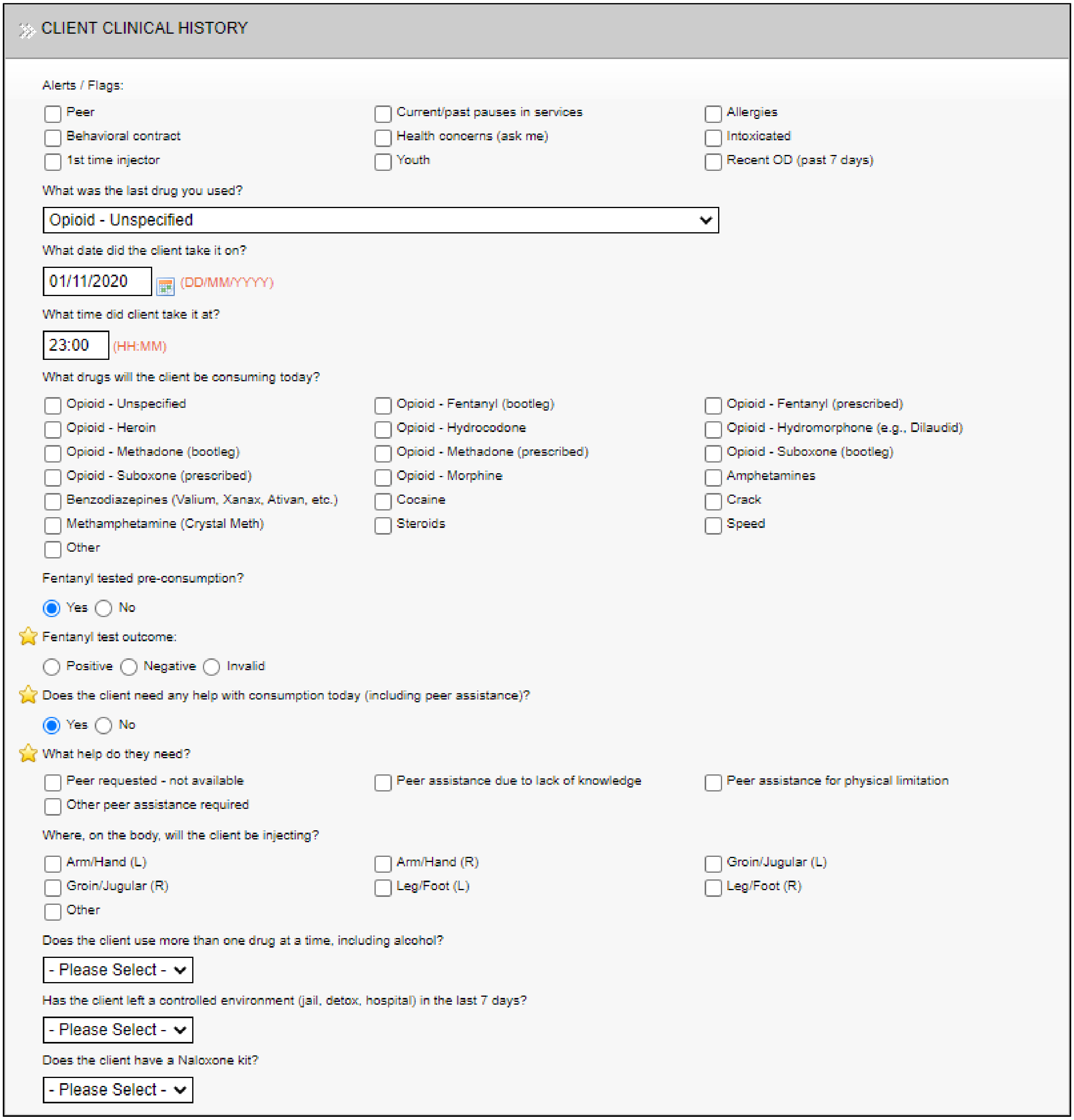


Client Clinical History

For each transaction, you will want to make sure that you have the most up-to-date client clinical history.

There are nine pieces of information that are collected under the "**Client clinical history**" section:

1. **Alerts / Flags**;
    - The information tracked under this section will be displayed for each client on the **CTS Home Screen**.
2. The **drug that was last used** by the client;
    - Date and time when the last was consumed can also be tracked.
    - Please use 24-hour time when tracking the time when the client last consumed.
3. The **drug(s) that the client will be consuming** on this particular visit;
4. If the client **fentanyl tested their drug(s) pre-consumption**;
    - Fentanyl test outcome is tracked for clients who fentanyl tested their drug(s) pre-consumption.
        - The outcome of the fentanyl test is mandatory.
5. If the client **needs any help with consumption (including peer assistance)** during their visit;
    - This question is mandatory.
    - Clients who need help will be asked to specify the sort of help that they will require.
        - This question is mandatory.
6. **Where on their body the client will be injecting**;
7. If the client **uses more that one drug at a time (including alcohol)**;
8. If the client has **left a controlled environment (e.g., jail, detox, etc.) in the last 7 days;** and
9. If the client has a **naloxone kit**.



CLIENT CLINICAL HISTORY

Alerts / Flags:

- [ ] Peer
- [ ] Current/past pauses in services
- [ ] Allergies
- [ ] Behavioral contract
- [ ] Health concerns (ask me)
- [ ] Intoxicated
- [ ] 1st time injector
- [ ] Youth
- [ ] Recent OD (past 7 days)

What was the last drug you used?

Opioid - Unspecified

What date did the client take it on?

01/11/2020 (DD/MM/YYYY)

What time did client take it at?

23:00 (HH:MM)

What drugs will the client be consuming today?

- [ ] Opioid - Unspecified
- [ ] Opioid - Fentanyl (bootleg)
- [ ] Opioid - Fentanyl (prescribed)
- [ ] Opioid - Heroin
- [ ] Opioid - Hydrocodone
- [ ] Opioid - Hydromorphone (e.g., Dilaudid)
- [ ] Opioid - Methadone (bootleg)
- [ ] Opioid - Methadone (prescribed)
- [ ] Opioid - Suboxone (bootleg)
- [ ] Opioid - Suboxone (prescribed)
- [ ] Opioid - Morphine
- [ ] Amphetamines
- [ ] Benzodiazepines (Valium, Xanax, Ativan, etc.)
- [ ] Cocaine
- [ ] Crack
- [ ] Methamphetamine (Crystal Meth)
- [ ] Steroids
- [ ] Speed
- [ ] Other

Fentanyl tested pre-consumption?

(●) Yes ( ) No

Fentanyl test outcome:

( ) Positive ( ) Negative ( ) Invalid

Does the client need any help with consumption today (including peer assistance)?

(●) Yes ( ) No

What help do they need?

- [ ] Peer requested - not available
- [ ] Peer assistance due to lack of knowledge
- [ ] Peer assistance for physical limitation
- [ ] Other peer assistance required

Where, on the body, will the client be injecting?

- [ ] Arm/Hand (L)
- [ ] Arm/Hand (R)
- [ ] Groin/Jugular (L)
- [ ] Groin/Jugular (R)
- [ ] Leg/Foot (L)
- [ ] Leg/Foot (R)
- [ ] Other

Does the client use more than one drug at a time, including alcohol?

- Please Select -

Has the client left a controlled environment (jail, detox, hospital) in the last 7 days?

- Please Select -

Does the client have a Naloxone kit?

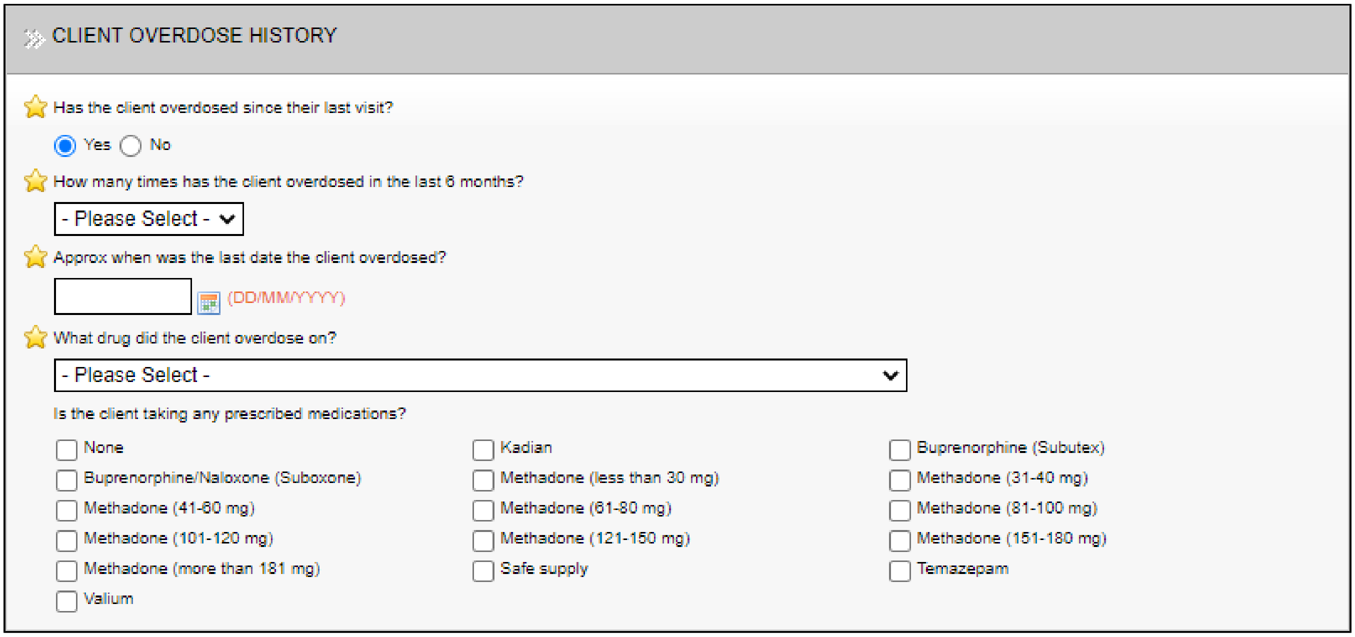
- Please Select -

Client overdose history

You will also want to have the client's most up-to-date overdose history for every transaction.

There are two main pieces of information that are collected under the "**Client overdose history**" section:

1. If the client has **overdosed since their last visit**; and
   - This question is <u>mandatory</u>.
   - Clients who respond "yes" to this question will also be asked:
     - Number of times they have overdosed in the last 6 months;
     - Approximate date of last overdose; and
     - Drug that they overdosed on.
2. If the client is **taking any prescribed medications**.

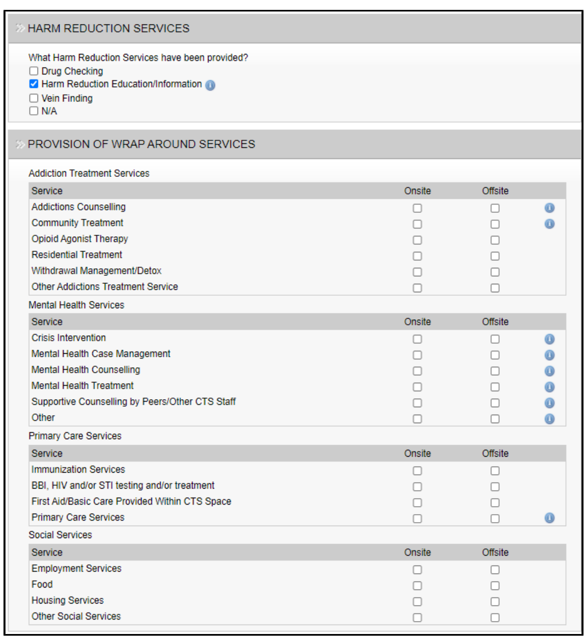


Harm reduction service & Wrap Around Services

The **Client Details Screen** is also where you log information about the harm reduction and wrap around services (onsite and offsite) that were provided to the client during the visit.

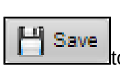
There are two main pieces of information that are collected under the "**Harm Reduction Services**" and "**Provision of Wrap Around Services**" sections:

1. **Harm reduction services** that were provided to the client.
2. **Wrap around services** that were provided to the client.
    - Wrap around services have been categorized by:
        a. Addiction treatment services;
        b. Mental Health Services;
        c. Primary Care Services; and
        d. Social Services.



- When a client is discharged, you will be asked to log information about the harm reduction and wrap around services (onsite and offsite) that were provided to them during the visit.
- Additional information about some services has been included on the NEO platform and can be viewed by hovering over the icon.
- Recurring visits will include pre-populated data collected from the previous visit.

Once you have filled out the **Client Details Screen** to the best of your knowledge, click one of the following buttons to move the client to the most appropriate next step:

- 

to save the information that has been collected.

- Save & Move to Waiting Room to move the client to the waiting room in the CTS site.
- Save & Move to Booth to move the client to a nursing station/booth/room in the CTS site.
- Save & Discharge to discharge a client who did not use the CTS services.
- History to access the client's details from this and previous visits.

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CTS Home Screen (CTS)

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Add a Client (CTS)

CTS Home Screen (CTS)

CTS Home Screen

Video Instructions:

The **CTS Home Screen** is where you can see all of the clients that are currently using and being tracked in the CTS module.

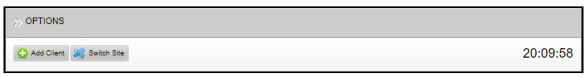
The **CTS Home Screen** is categorized by four different sections.

1. Options section

The "**Options**" section include the 

and 

buttons. This section also includes the current time.

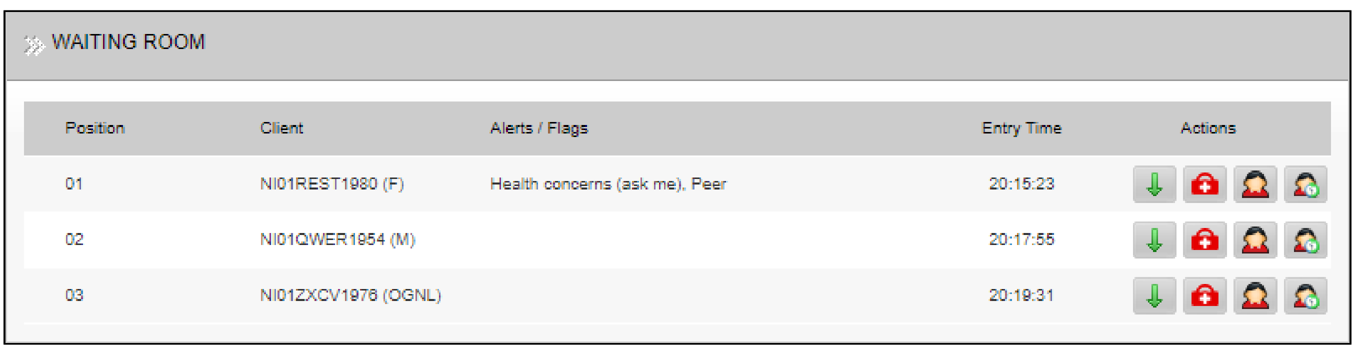


- For more information on adding a client, click **here**.
- For more information on selecting your site, click **here**.

2. Waiting Room Section

The "**Waiting Room**" section includes all the clients that have been moved to the waiting room. There are four pieces of information displayed in this section:

1. **Position**: Displays the order of clients that have been moved to the waiting room.
2. **Client**: Displays the client's reference code and gender.
3. **Alerts / Flags:** Displays client alerts/flgas that were noted in the **Client Details Screen**.
4. **Entry Time**: Displays the time that the client was moved to the waiting room.



Actions:

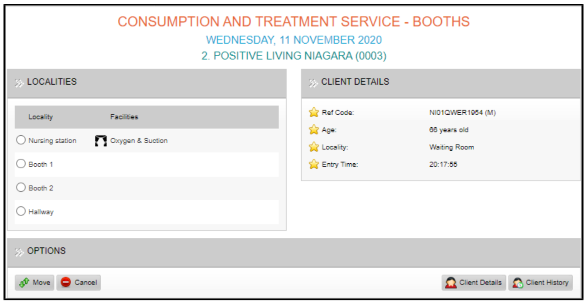
There are four actions that you can perform on a client's profile while they are in the "**Waiting Room**" section of the CTS Home Screen:

Move to Booth 

The "**Move to Booth**" action will allow you to move the client to the different localities in the "**Booths**" section on the CTS Home Screen.

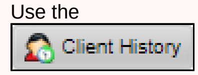
To move a client to a locality in the "**Booths**" section, click on the desired locality then click on the 

button.



- The client's reference code, age, locality, and entry time is displayed under the "**Client Details**" section.
- Use the 

button to go back to the **CTS Home Screen** without moving your client to another locality.
- Use the 

button to access the **Client's Details Screen**.
- Use the 

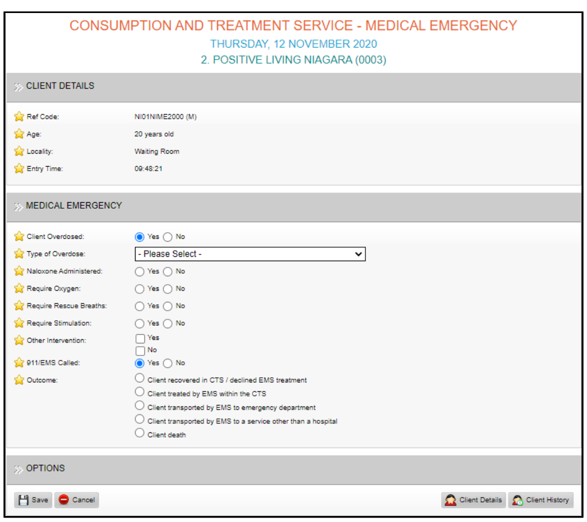
button to access the **Client's History Screen**.

Add a Medical Emergency 

The "**Add a Medical Emergency**" action will allow you to log any medical emergency that they client may experience during their visit.

Note that the CTS module allows you to log two medical emergencies:

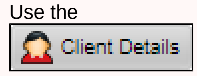
1. If the **client overdosed**; and
   - This question is mandatory.
   - If the client overdosed, you will be asked to log the following:
     - **Type of overdose;**
     - If **naloxone** was administered;
     - If **oxygen** was required;
     - If **rescue breaths** were required;
     - If **stimulation** was required; and
     - If **other interventions** were required.
2. If **911/EMS was called**.
   - This question is mandatory.
   - If 911/EMS was called, you will be asked to log the **outcome** of the call.

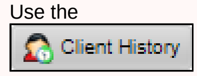


Once you have filled out the medical emergency details click on the 

button to log the information and return to the **CTS Home Screen**.

- Hovering over the  on the **CTS Home Screen** will create a pop-up with information about the client's last medical emergency.
- The client's reference code, age, locality, and entry time is displayed under the "**Client Details**" section.
- Use the 

button to go back to the **CTS Home Screen** without moving your client to another locality.
- Use the 

button to access the **Client's Details Screen**.
- Use the 

button to access the **Client's History Screen**.

Edit Client Details 

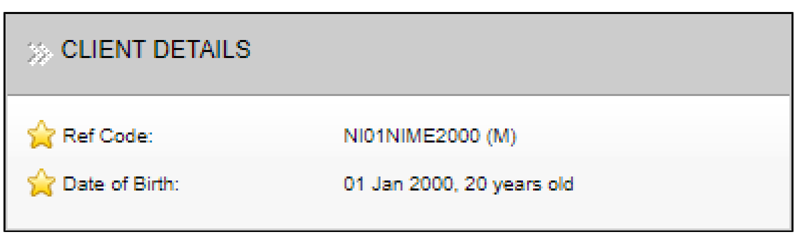
The "**Edit Client Details**" action will bring you to the **Client's Details Screen.** For more information about the **Client's Details Screen**, click **here**.

Client History 

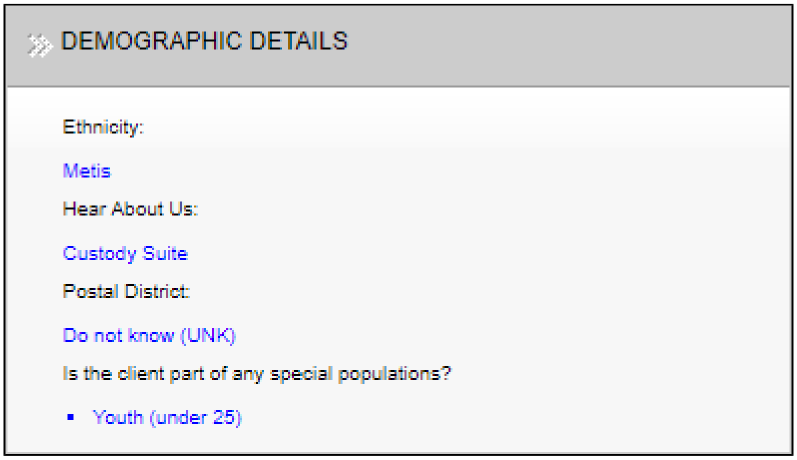
The "**Client History**" action will bring you to the **Client History Screen** where you will be able to review all the information that has been logged for a client for current and previous visits. Note that the information displayed on each screen is based on that particular client visit.

The client's history is displayed in nine different categories:

1. Client Details: Includes the client's reference code, date of birth, and age.



2. Demographic Details: Includes the client's ethnicity, how they heard about the CTS site, postal code, and if they are part of a special population.



3. Clinical History: Includes the following client information:

- Alerts / Flags
- Last drug used
- Date and time of last drug used
- Drug(s) client will be using on the visit
- Status of fentanyl test pre-consumption
- If client needs help with consumption during the visit
- Where on the body client will be injecting
- If client uses more than one drug at a time
- If client has left a controlled environment in the last 7 days
- If client has a naloxone kit

CLINICAL HISTORY

Alerts / Flags:

- Allergies
- Peer

What was the last drug you used?

Opioid - Codeine

What date did the client take it on?

01 Nov 2020

What time did client take it at?

23:00

What drugs will the client be injecting today?

- Opioid - Fentanyl (prescribed)
- Opioid - Heroin
- Opioid - Methadone (prescribed)
- Opioid - Suboxone (bootleg)

Fentanyl tested pre-consumption?

No

Does the client need any help with consumption today (including peer assistance)?

No

Where, on the body, will the client be injecting?

- Groin/Jugular (R)

Does the client use more than one drug at a time, including alcohol?

Yes

Has the client left a controlled environment (jail, detox, hospital) in the last 7 days?

Prison

Does the client have a Naloxone kit?

Intranasal

4. Overdose History: Includes information about the client's last overdose and if they are taking any prescribed medications.

OVERDOSE HISTORY

Has the client overdosed since their last visit?

No

Is the client taking any prescribed medications?

- None

5. Episode Details: Includes the status of the client's visit, as well as information about when it was created and by whom.

EPISODE DETAILS

Status:	New
Created On:	Thursday, 12 November 2020 09:48
Created By:	CTS Test :: CAMH - Test System

6. Locality: Includes information regarding the client's flow through the CTS site, including entry time and exit time for each section.

LOCALITY

Locality	Entry Time	Exit Time	
Waiting Room	14:01:33	14:03:23	
Booth 1	14:03:23	14:07:55	
Post Consumption Room	14:07:55	14:09:07	

7. Supervised Details: Includes information about the drug(s) that the client consumed during their visit and if they went to the post-consumption room.

SUPERVISED DETAILS

Drugs Injected			
Drug	Route	Quantity	Peer Assisted
Opioid - Heroin	Intra-nasal	2	Yes

Has client gone to the Post Consumption Room?

Yes

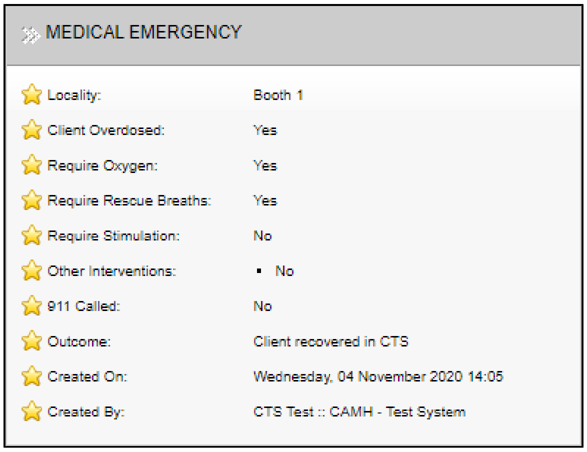
8. Harm Reduction Services and Provision of Wrap Around Services: Includes information about the harm reduction and wrap around services that have been provided to the client during the visit.

PROVISION OF WRAP AROUND SERVICES

Addiction Treatment Services		
Service	Onsite	Offsite
Opioid Agonist Therapy	✔	

Mental Health Services		
Service	Onsite	Offsite
Mental Health Treatment	✔	

9. Medical Emergency: Includes information about the client if they experienced a medical emergency during their visit,



MEDICAL EMERGENCY

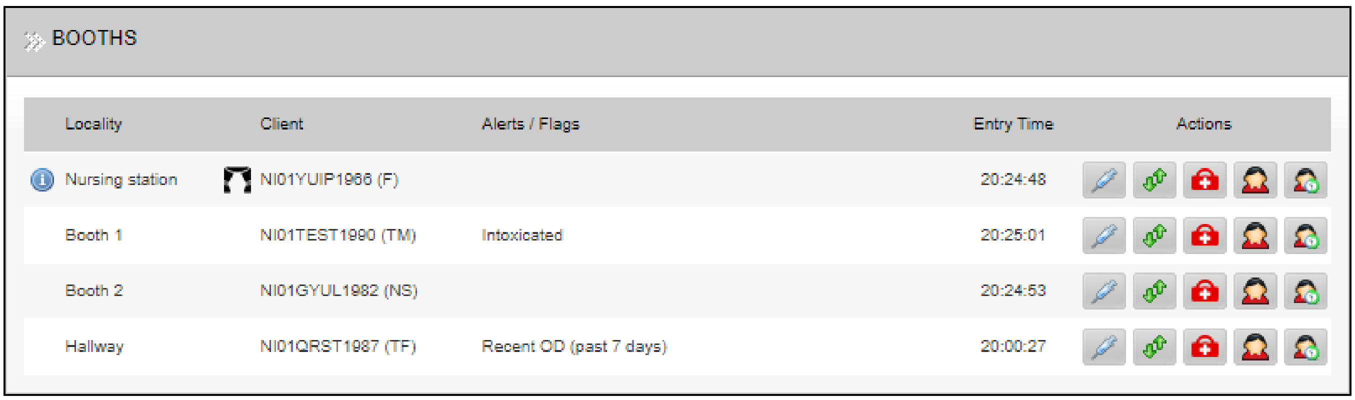
Locality:	Booth 1
Client Overdosed:	Yes
Require Oxygen:	Yes
Require Rescue Breaths:	Yes
Require Stimulation:	No
Other Interventions:	• No
911 Called:	No
Outcome:	Client recovered in CTS
Created On:	Wednesday, 04 November 2020 14:05
Created By:	CTS Test :: CAMH - Test System

- Items displayed on the **Client History Screen** is based on the information collected in the **Client Details Screen** for a particular visit.
- The client's visit date, reference code, and site name are provided at the top of the screen.
- Use the Previous and Next buttons to toggle between different client visits.
- Use the Back button to return to the **CTS Home Screen**.

3. Booths Section

The "**Booths**" section includes all the clients that have been moved into booths at your CTS site. There are four pieces of information displayed in this section:

1. **Locality**: Displays which booth the client is currently in.
2. **Client**: Displays the client's reference code and gender.
3. **Alerts / Flags:** Displays client alerts/flags that were noted in the **Client Details Screen**.
4. **Entry Time**: Displays the time that the client was moved to the booth.



BOOTHS

Locality	Client	Alerts / Flags	Entry Time	Actions
Nursing station	NI01YUIP1966 (F)		20:24:48	
Booth 1	NI01TEST1990 (TM)	Intoxicated	20:25:01	
Booth 2	NI01GYUL1982 (NS)		20:24:53	
Hallway	NI01QRST1987 (TF)	Recent OD (past 7 days)	20:00:27	

Actions:

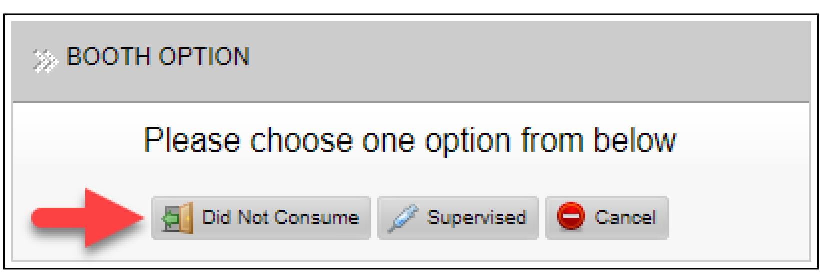
There are five actions that you can perform on a client's profile while they are in the "**Booths**" section:

Discharge, Supervised or Move to Waiting Room

The "**Discharge, Supervised or Move to Waiting Room**" action will allow you to log if the client did not consume or information about their supervised consumption.

Did Not Consume

To log if the client did not consume while at the CTS site, click on the , then click on the Did Not Consume button to access the **Did Not Consume Screen**.

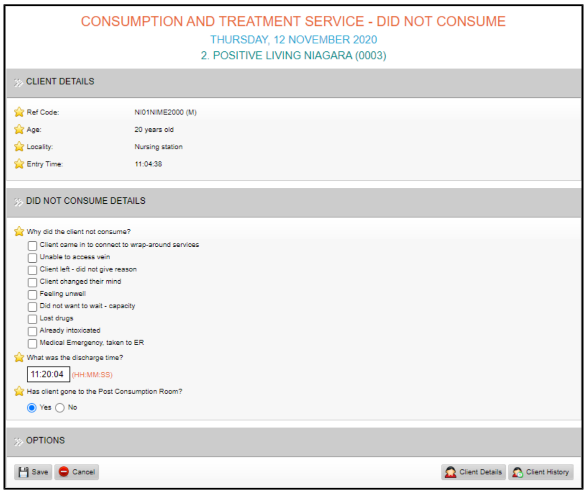


There are three main pieces of information that are collected under the **Did Not Consume Screen.**

1. **Reason why the client did not consume**;

- This question is mandatory.

2. **Discharge time**; and
   - This question is mandatory.
3. If the **client went to the post consumption room**.
   - This question is mandatory.
   - If the client did NOT go to the consumption room, there are four additional pieces of information that are collected:
     - Where the client is being discharged;
     - Status of fentanyl test post-consumption;
     - Client's reason for not using the post-consumption room; and
     - Harm reduction and wrap around services (onsite and offsite) that were provided to the client during their visit.



- The client's reference code, age, locality, and entry time is displayed under the "**Client Details**" section.
- Use the Cancel button to go back to the **CTS Home Screen** without moving your client to another locality.
- Use the Client Details button to access the **Cl ient's Details Screen**.
- Use the Client History button to access the **Cl ient's History Screen**.

Once you have filled out the did not consume details click on the Save button to log the information and return to the **CTS Home Screen**.

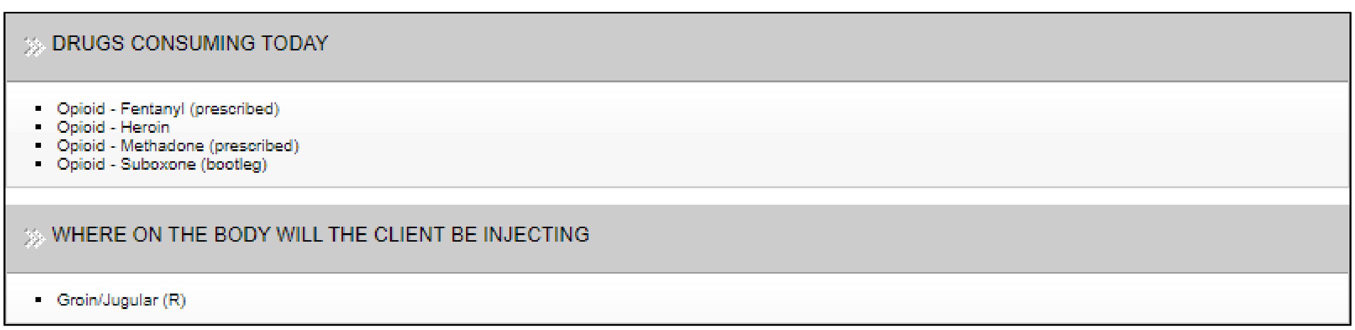
Supervised

To log information about the client's supervised consumption click on the button, then click on the Supervised button to access the **Supervised Screen**.

There are two pieces of information that are displayed and three that are collected under the **Supervised Screen.**

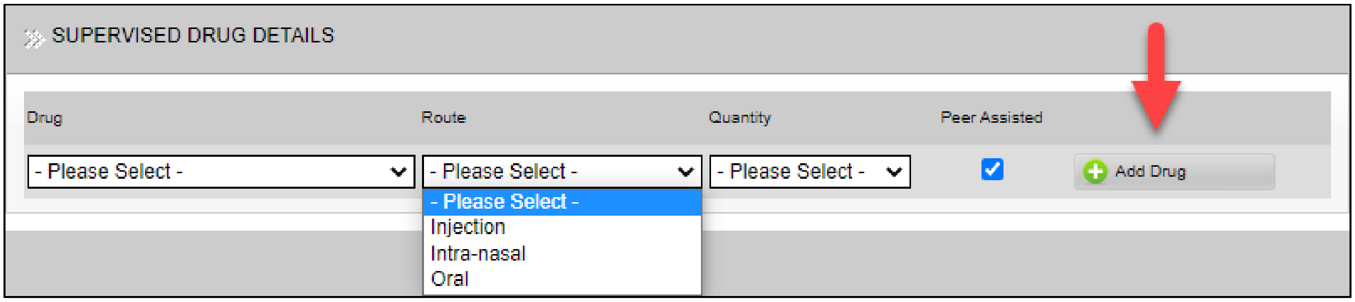
1. Drugs consuming today: Includes a list of drug(s) that the client will be using during their visit - this information was collected in the **Client Details Screen.**

2. Where on the body will client be injecting: Includes information about where in the body the client will be injecting during their visit - this information was collected in the **Client Details Screen.**



3. Supervised drug details: This section is used to log the drugs that the client used during their visit, including the route of use, quantity, and if peer assistance was required. Note that this question is mandatory.

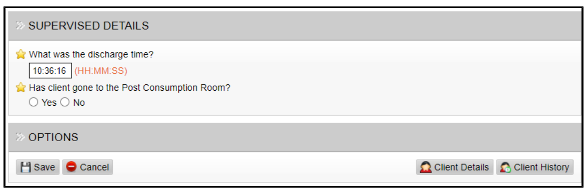
- Use the drop-down menu to select the drug, route, and quantity. If the client required peer assistance click on the button. Once you have filled out the supervised drug details, click on the Add Drug button to log the drug(s).



4. Supervised details: This section is used to log **discharge time** and **if the client went to the post consumption room**. Note that these questions are mandatory.

If the client did NOT go to the consumption room, there are four additional pieces of information that are collected:

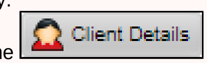
- Where the client is being discharged;
- Status of fentanyl test post-consumption;
- Client's reason for not using the post-consumption room; and
- Harm reduction and wrap around services (onsite and offsite) that were provided to the client during their visit.

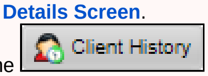


Once you have filled out the client's supervised consumption details click on the 

button to log the information and return to the **CTS Home Screen**.

- The client's reference code, age, locality, and entry time is displayed under the "**Client Details**" section.
- Use the 

button to go back to the **CTS Home Screen** without moving your client to another locality.
- Use the 

button to access the **Client's Details Screen**.
- Use the 

button to access the **Client's History Screen**.

Move to another booth or waiting room

Information about this action has been included above under the "**Move to Booth**" section.

Add a Medical Emergency

Information about this action has been included above under the "**Add a Medical Emergency**" section.

Edit Client Details

The "**Edit Client Details**" action will bring you to the **Client's Details Screen.** For more information about the **Client's Details Screen**, click **here**.

Client History

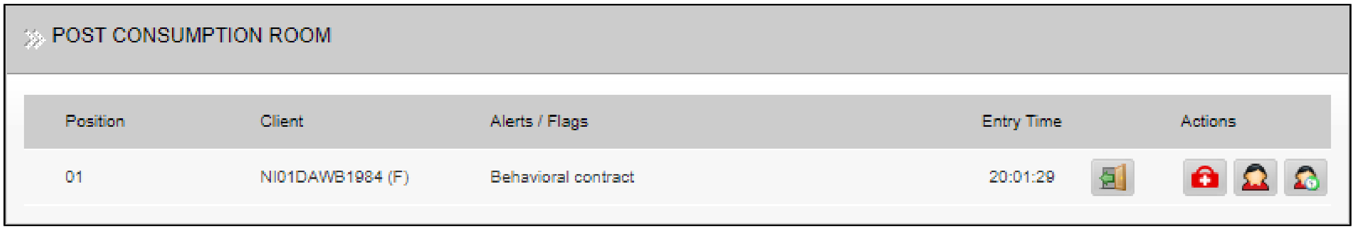
Information about this action has been included above under the "**Client History**" section.

---

4. Post Consumption Room

The "**Post Consumption Room**" section includes all the clients that have been moved to the post consumption room in your CTS site. There are four pieces of information displayed in this section:

1. **Position**: Displays the order of clients that have been moved to the post consumption room.
2. **Client**: Displays the client's reference code and gender.
3. **Alerts / Flags:** Displays client's alerts/flags that were noted in the **Client Details Screen**.
4. **Entry Time**: Displays the time that the client was moved to the booth.



Actions:

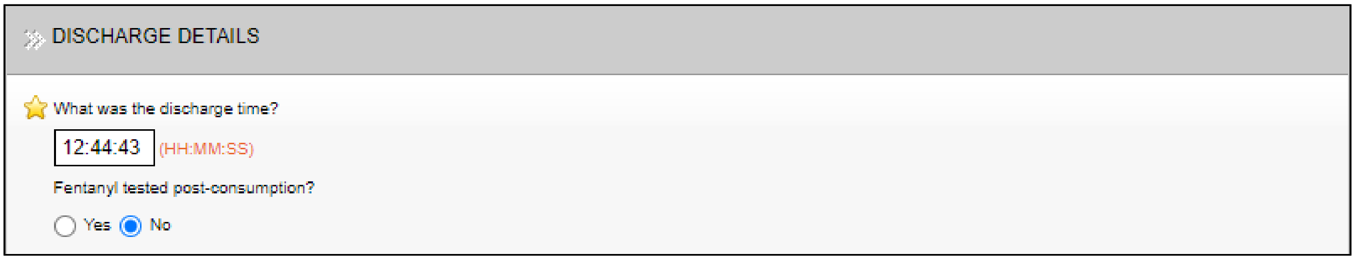
There are four actions that you can perform on a client's profile while they are in the "**Post Consumption Room**" section:

Discharge Client 

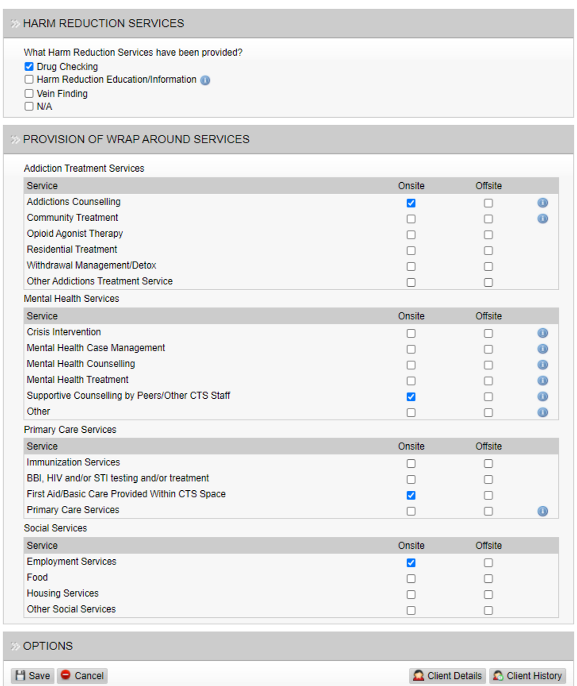
There are four main pieces of information that are collected under the **Discharge Screen.**

1. **Discharge time** (automatically captured by the CTS module, can be modified as needed);
2. **Status of fentanyl test post-consumption**;

- This question is mandatory.



3. **Harm reduction services** that were provided to the client during their visit; and
4. **Wrap around services** (onsite and offsite) that were provided to the client during their visit.



- The client's reference code, age, locality, and entry time is displayed under the "**Client Details**" section.
- Use the Cancel button to go back to the **CTS Home Screen** without moving your client to another locality.
- Use the Client Details button to access the **Cl ient's Details Screen**.
- Use the Client History button to access the **Cl ient's History Screen**.

Once you have filled out the client's discharge details click on the Save button to log the information and return to the CTS Home Screen.

Add a Medical Emergency

Information about this action has been included above under the "**Add a Medical Emergency**" section.

Edit Client Details

The "**Edit Client Details**" action will bring you to the **Client's Details Screen.** For more information about the **Client's Details Screen**, click **here**.

Client History

Information about this action has been included above under the "**Client History**" section.

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Client Details Screen (CTS)

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CTS Home Screen (CTS)

You're done!

As you can see, logging a transaction for a client only takes a few steps:

1. Select the client's **gender** and type in their **client reference code**;
2. Fill out the **Client Details Screen**: and
3. Move the client through the different CTS sections and enter information about their visit.

Exercises

Now that you have completed the training module, take some time to practice by logging the following transaction in the test environment:

1. Log a new transaction with a male client.
2. Log a medical emergency for the client.
3. Move the client through the different CTS sections.
4. Discharge the client from the CTS site.

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CTS Home Screen (CTS)