DRUG AND ALCOHOL TREATMENT INFORMATION SYSTEM

SUPPORTING ONTARIO'S HEALTHCARE SYSTEM WITH HIGH QUALITY INFORMATION

Activity Log Training Tutorial – Searchable Version

Contents

Administrative Processes Supporting the Activity Log

Acronyms used in this document:

LHIN - Local Health Integrated Network
MoHLTC or MoH - Ministry of Health and Long Term Care

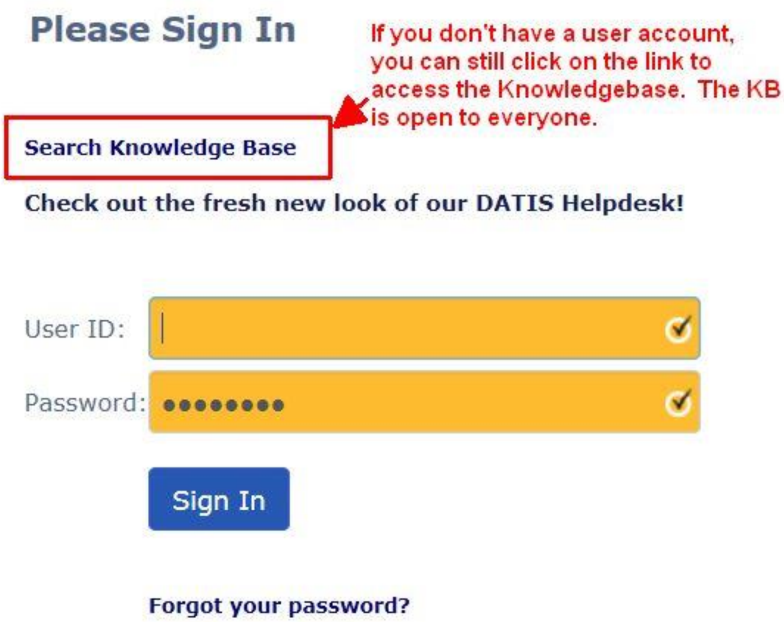
HDB – Health Data Branch
CSA - Catalyst System Administrator
PG - Problem Gambling
SA - Substance Abuse
FC - Functional Centre
OHRS – Ontario Healthcare Reporting Standards – (formerly MIS -Management Information System)

Support Resources

DATIS Helpdesk – The Knowledgebase is available to everyone from the logon screen:

http://datishelpdesk.issuetrak.com

"Search knowledge base"   (See image below)



Other Supporting Resources:

Practice Database – check with your Catalyst System Administrator for Log-in Information for **Online.**

Training Tutorials – Available in the practice database under the Support & Resources menu.

Practice Exercises — Available in DATIS Helpdesk Knowledgebase - Article #220 as a downloadable attachment.

Setting up the Activity Log

If your **agency is new to using the Activity Log** you will need to set up your Catalyst database with activities and then provide all users with the appropriate privileges.

O R

If it is determined that **a new activity needs to be added** these will need to be set up and user privileges provided.

Activities are added to your Catalyst database by *Activity Type*; definitions are to follow. Go to Article #300 in the DATIS Helpdesk Knowledgebase to access instructions on how to add activities to your database.

Activities are added and maintained at the agency level, i.e. by a Catalyst user with administrative privileges

Activities are global across an agency, in other words they are NOT site specific. All sites have the same list of activities.

All activities are privileged. Meaning every user that wishes to use an activity will need to be given privileges to do so by a Catalyst user with Administrative privileges. Go to Article #31 in the DATIS Helpdesk Knowledgebase for instructions on setting up and updating user privileges.

Activity Type Definitions

Client Services - Direct face-to-face - In-house

An activity that is provided by a staff member of the agency face-to-face (in person at the agency) on an individual or group basis. This includes service to the client and/or significant other(s) in attendance on behalf of the client. The activity must be documented in the client file and take longer than five minutes. Examples include individual assessment, group assessment, individual counselling, couple counselling and group counselling.

Client Services - Direct face-to-face - Virtual

An activity that is provided by a staff member of the agency via phone/ videoconferencing on an individual or group basis. This includes service to the client and/or significant other(s) in attendance on behalf of the client. The activity must be documented in the client file and take longer than five minutes. Examples include individual assessment, group assessment, individual counselling, couple counselling and group counselling.

Client Services - Direct non face-to-face

An activity provided by a staff member of the agency that involves direct non face-to-face communication (ie. by telephone or internet/email) in lieu of a face to face visit. This includes service to the client and/or significant other on behalf of the client. Examples include telephone support, crisis intervention and individual counselling

Client - Direct non face-to-face An activity provided by a staff member of the agency that involves direct non face-to-face communication (i.e. by telephone or internet/email) in lieu of a face to face visit. This includes service to the client and/or significant other on behalf of the client. Examples include telephone support, crisis intervention and individual counselling

Client - Indirect

Activities related to or supporting client treatment that do not directly involve the client. Examples include 3rd party consultations, travel time, referrals and charting.

Pre-Entry Services - Direct face-to-face

An activity that is provided by a staff member of the agency as face-to-face or via videoconferencing on an individual or group basis. The activity is provided to those who have never been admitted to the agency or to clients who do not have an open admission. Services include Crisis, Information Request, Intake, Outreach and/or Screening.

Pre-Entry Service - Direct non face-to-face

An activity that provides direct non face-to-face communication to individuals (**do not use for groups**), who have never

Pre-Entry Services - Indirect
Supporting services/activities not involving direct first party contact provided to clients who have never been admitted to the agency, or who do not have an open admission. Related activities include travel, prep and documentation.

Prevention/Awareness
Educational and training activities. This activity type is used by designated problem gambling agencies and agencies that have Health & Promotion funding.

_Administration - Central
Administrative activities related to the operation of the agency. Examples include board preparations, finance and human resources.

Administration - Program
Administrative activities related to the operation of programs. Examples include program planning, advisory committees and program evaluation.

Non-MOHLTC Administration
Administration activities/services not associate to MoHLTC funded Substance Abuse and/or Problem Gambling programs.

Private/Personal Time
Non-work activities a staff person logs in the schedule. Examples include vacation, sick or overtime.

Setting up your Database to Auto-calculate Service Summary Information

Before a program registration can be terminated, the *Program Service Summary* section on the *Program Info* screen must be completed. The activity log has the ability to "auto-calculate" the *Program Service Summary Information* from the activity log providing the feature has been 'turned on' or 'set' to auto-calculate. At the time you request the program be set up, also request the auto calc be turned on. However, if the program is already set up in your database, you can request to have the featured turned to "Yes".

Note: The auto-calc should be checked on for all services with the exception of RWMS (Residential Withdrawal Management Services). When the text in the Program Service Summary fields is greyed out, the auto-calc feature is on; if you're able to manually enter numbers, it is off and needs to be turned on with the exception of RWMS.

For MoHLTC Substance Abuse and/or Problem Gambling Programs, you will be required to fill in a form that is located within the DATIS Helpdesk Knowledgebase.

For non MoHLTC SA or PG programs the auto-calc feature can be turned on at the agency level by anyone with Catalyst administrative privileges. Go to Article #85 in the DATIS Helpdesk Knowledgebase to reference information on managing programs within Catalyst from an administrative viewpoint.

Contact DATIS Service Desk to set a program to auto-calculate service summary information.

Module 1 – Pre-Entry Services from the Client Information Screen

Overview of Changes made to Entry Services

Entry Services are linked directly to the Activity Log and are used prior to an admission.

- It will be necessary to apply a Functional Centre number to Entry Services for funded MoHLTC Substance Abuse and/or Problem Gambling services.

Definition of the Entry Services

Entry Services can be defined as activities and decision making steps which result in someone receiving information about and/or enter the addiction treatment system.

These are services provided to clients prior to admission and registration to programs.

Entry services include *Information Request, Intake, Screening, Crisis* and *Outreach*.

Entry Service activities are standard and cannot be added to, edited or deleted at the agency level. Clients receiving entry services do not have an open admission to the agency.

Necessary Requirements for Adding Entry Services

No service can be applied to a client until minimal information is input to the *Client Information* Screen. Entry Services can be applied to a client up until a client is registered into a program.

If the client's identity is not known, or minimum requirements to create a file cannot be met, use one of the two anonymous Chart/File numbers, *0M* (zero) or *0F* (zero), preset in your database for this purpose.

0M = Anonymous Male 0F = Anonymous Female

No other files containing anonymous records should be created. More info and a demonstration of adding an entry service for an anonymous client can be seen in the *Anonymous Clients* presentation.

Pre-Entry Services for OHRS Reporting Agencies are required to report on OHRS statistical data. To assist the agencies these data are compiled from input by Catalyst Users and extracted from Catalyst by way of reports.

As of August 25th, 2014, the FC **COM Information and Referral Service–Provincial-Substance Abuse 725707811** and the Problem Gambling counterpart **FC 725707812** are no longer available to agencies.

COM Information and Referral Service–Provincial-Substance Abuse and Problem Gambling functional centres are meant to be used by provincial services such as those provided by CONNEX Ontario and ***do not apply to addiction-funded agencies.***

Pre-Entry services should be reported in the treatment functional centre of the staff providing the service.

Pre-entry activity type, *Information requests* are **Not** to be reported as SPI or SPGI, regardless if the agency staff members are Administrative or Clinical and regardless if the client is anonymous or not. Please note even though Information Request will not be reported in OHRS reports, DATIS continues to collect this information and report in the PR 07/PR 07S and other Catalyst reports.

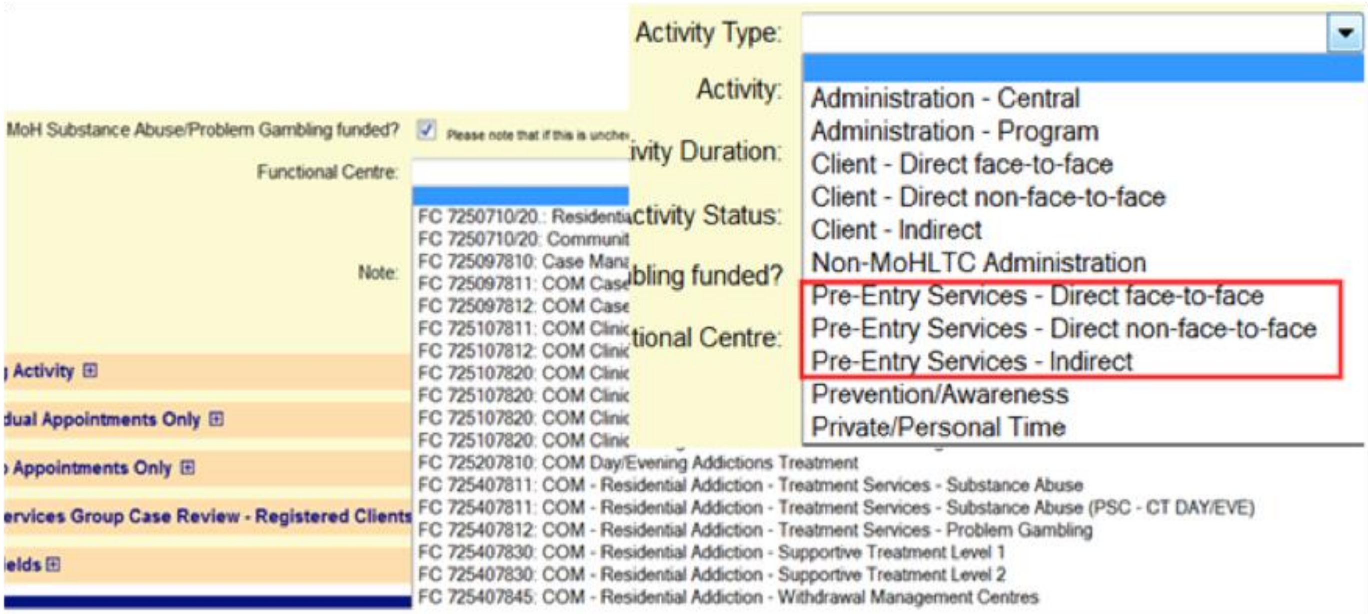
For those instances such as Entry Services, where a client is not linked to a program, the Catalyst User will have to select the Functional Centres to apply the service.

When an *Activity Type* for Entry Services is selected, a check is automatically placed in the box beside the field label "*MoH Substance Abuse/Problem Gambling funded?"* with the exception of *Information Request.*

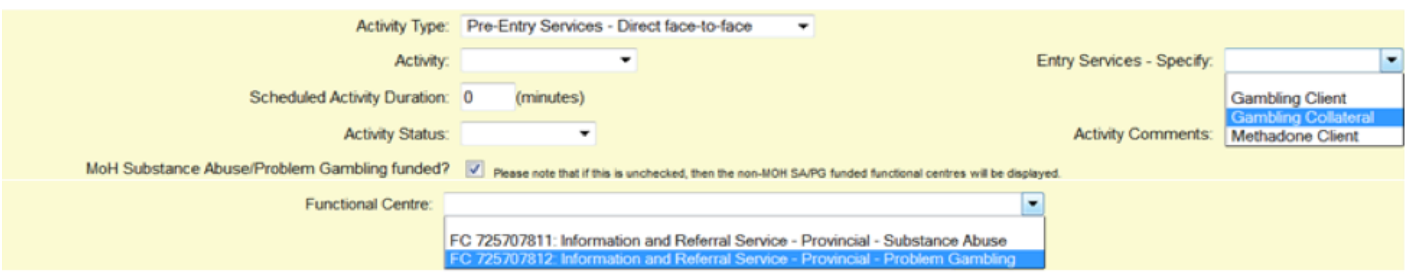
- When selecting the Activity Type of Pre-Entry Services, DATIS will populate the functional centre field with MOH functional centres that each agency is funded for instead of Information and Referral Services FCs 725707811 and 725707812 when the MOH button is selected.

If the MOH button is not checked on, the non-MOH functional centres will be populated for selection.

EXCEPTION: There is no Functional Centre for Information Request even if it is selected and the MOH box is unselected; the selection list option will be null.



- DATIS removed the validation between Entry Services Specify (Note 2) selection list and the FC selection. There is no validation between Entry Services Specify (Note2) for Gambling Client or Gambling Collateral because the FC that covers both SA and PG such as Community Day/Evening Treatment could be generic.
- Currently, Catalyst forces the FC to be a gambling FC if Gambling Client or Gambling Collateral is specified because the FC could be a generic FC that covers both SA and PG such as Community Day/Evening Treatment.



Pre-Entry Services Reporting

Activity	Functional Centre	Reported in OHRS	Reported in other Catalyst reports?
Information Request	Null: No Functional Centre for this Activity	Not Reported in OHRS	**Yes**
Intake	Treatment functional centre of the staff providing the service	If duration of the session >=6 minutes	**Yes**
Screening	Treatment functional centre of the staff providing the service	If duration of the session >=6 minutes	**Yes**
Crisis	Treatment functional centre of the staff providing the service	If duration of the session >=6 minutes	**Yes**
Outreach	Treatment functional centre of the staff providing the service	If duration of the session >=6 minutes	**Yes**

Note: *For an agency that reports Information request activities, these will no longer be reported in OHRS reports as per the direction from the Health Data Branch.*

Pre-Entry Services Definitions

Activities and decision-making steps, which underlie the process by which someone obtains information about and/or enters the addiction treatment system. Includes:

• Information Request: a request for information about agency programs, the treatment system, or other issues, made by a person from the community, a staff member from another agency, or another professional

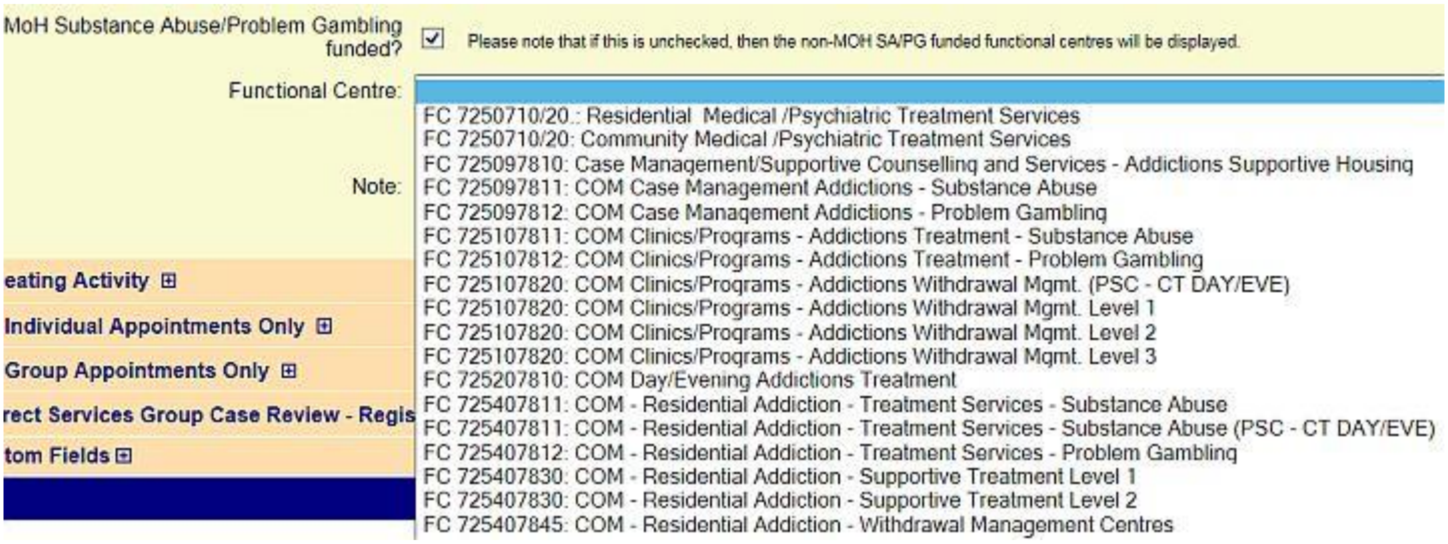
• Intake: contact with a person to determine whether he or she is eligible for agency services, to register the client into the agency, and to orient the client to services available at the agency

• Screening: a brief process that collects information in only enough detail to determine the client's immediate needs and to provide direction for next steps in the assessment/treatment process. The screening process can also provide information to clients, which assists clients in clarifying their own position regarding next steps. Screening may occur in an individual or group format.

• Outreach: taking proactive steps to identify and connect with potential clients in the client's environment; to engage people who are at risk or have substance abuse or gambling problems. For example, schools, high risk neighborhoods, raves, shopping malls

• Crisis: immediate response to people in crisis through easy access that provides practical substance abuse and/or problem gambling assistance, support, advice or attention to urgent medical, psychosocial and/or basic needs

Options for checking the "*MoH Substance Abuse / Problem Gambling Funded?"* field as it relates to Entry Services are:



If your agency has additional funding which is not related to MoHLTC SA and PG, the Catalyst User will have to decide whether the Entry Services should be applied as follows:

Uncheck the box beside the field "*MoH Substance Abuse / Problem Gambling Funded?"* and leave the *Functional Centre* field blank

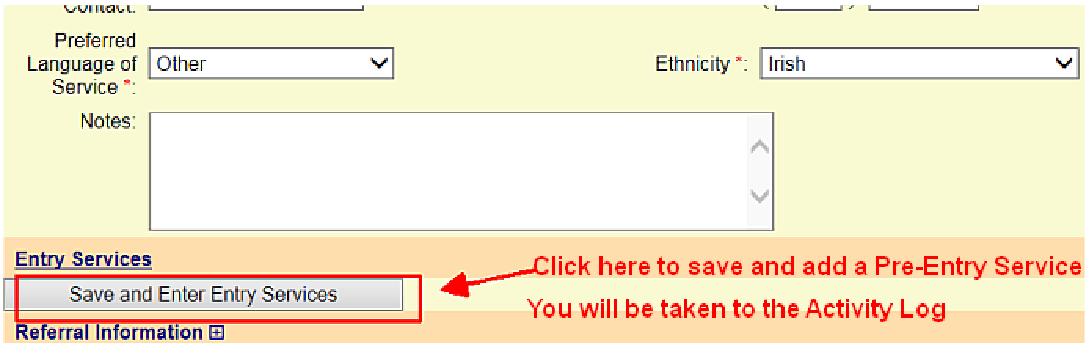
Or, uncheck the box beside the field "*MoH Substance Abuse / Problem Gambling Funded?"* and select a Functional Centre from the drop down selection list.

How to Add an Entry Service into the Activity Log through the Client Information Screen

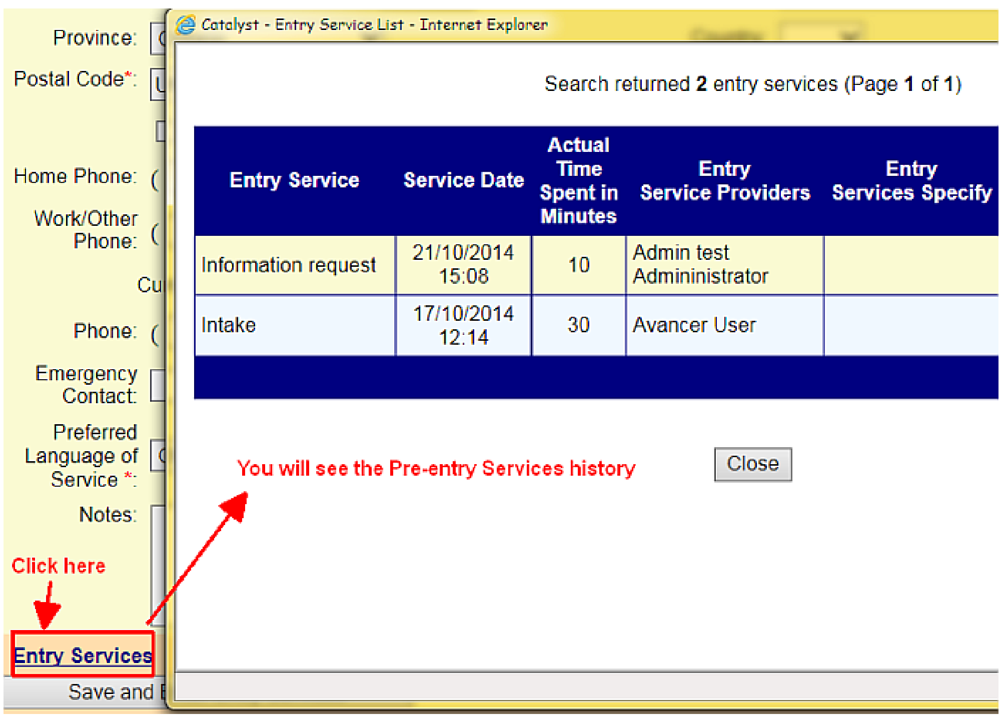
It is important to note that PRE-ENTRY SERVICES ARE PART OF THE ACTIVITY LOG. Pre-Entry Services can be entered into the Activity Log VIA the Client Information screen but they are not entered ON the Client Information screen.

Viewing/Editing and Deleting Entry Services

Entry Services are entered either directly into the Activity Log or via the Client Information screen.
The purpose of entering Pre-Entry Services by way of the Client Information screen is that the client's name will be populated in the Client Information section of the Activity Log - Add Appointment screen.



Entry Services can also be viewed in the Entry Services Log via the Client Information screen.



Module 1 - Highlights

- A client file is required before entry services can be added for a known client. If the minimum amount of information required to create a client file, is not known, use one of the two Chart/File numbers, *0M* or *0F* i.e. Anonymous Male or Anonymous Female.

- Entry Services can be added by way of the *Client Information* screen and the S*ave and Enter Entry Services* button, or Entry Services can be added directly to the Activity Log by doing a search for the client in the *For Individual Appointments Only* section of the *Activity Log - Add Appointment* screen.

- Editing and deleting Entry Services can only be done in the Activity Log.

- When selecting the Activity Type of Pre-Entry Services, DATIS will populate the functional centre field with MOH functional centres that each agency is funded.

- If the non-MOH button is selected, the non-MOH functional centres will be populated for selection.
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- EXCEPTION: There is no Functional Centre for Information Request even if it is selected and the MOH box is unselected; the selection list option will be null.

Module 2 - Adding Appointments in the Activity Log

Overview - General Appointments in the Activity Log

The Activity Log, Main Menu tab when selected expands to a selection list as follows: Add Appointment; Activity List; and, Batch Entry. Batch Entry is explained in a separate Module within this document.

On the Activity Log screen – some features that we have highlighted:

- Total Time Scheduled and the Total Time Spent.
- The duration of the activity is separated by Client and Staff member.
- The Scheduled Activity Duration field on the appointment screen is used to generate the Total Time Scheduled and is also used to generate the Start and End times. If the Scheduled Activity Duration field is not utilized the Start and End Times will be the same and the Total Time Schedule will equal zero.
- **Overlapping appointments are permitted**. There is no longer a need to add 1 minute or more to the Scheduled Activity Duration field in order to track activities booked for the same time frame. Caution: Overlapping appointments are permitted. **Note**: Due to this business rule, there is potential for double booking appointments. Particular attention should be paid when booking appointments for multiple service providers for the same activity.
- Prevention/Awareness Service Type has changed in how activity is applied and will be discussed in greater detail along with Anonymous Clients in a separate Module.

Changes for Residential Services:

The Health Data Branch (HDB) made changes for Residential Services as follows:

1. Residential Services (non-RWMS) must begin reporting on SPI and SPGI for July 1st (Q2); reporting is retroactive to April 1, 2014 (Q1). This includes the following FCs:
   - 725 40 78 11 Residential Addictions – Treatment Services – Substance Abuse
   - 725 40 78 12 Residential Addictions – Treatment Services – Problem Gambling
   - 725 78 30 Residential Addictions – Supportive Treatment

Note: The auto-calc has been turned on for all residential programs so that the activity log calculations can be generated.

2. RWMS Functional Centre will continue to have this requirement optional until further consultation with the sector has been completed and piloted to determine the value of reporting this type of data for RWMS.

Residential services are not required to report SPI and SPGI to DATIS for compliance (please note all non-residential services are required to report SPI and SPGI data to DATIS). Reporting requirements to DATIS are length of stay for all residential agencies. If a residential agency can generate SPI and SPGI statistics using other reporting methods for their OHRS reporting needs, they can do so. For those who wish to use Catalyst to generate this data, DATIS is supporting this initiative in the following ways: (note, these changes will take effect, Thursday, May 15th at 11am.)

1. A standard set of Client Direct face-to-face Service activities were uploaded to your Catalyst database. Activities and Definitions are located in an attachment to this issue. Privileges for the new activities will be assigned only to Catalyst administrators. Administrators can then assign the new activities to relevant staff.
2. A workaround, for quick group activity data entry, has been developed and tested by the pilot agencies to report Service Provider Group Interactions (SPGI) using the Indirect Services- Large Group (Registered Clients Only) group function in the activity log. Go to Article #390 in the DATIS Helpdesk Knowledgebase for details and instructions. Agencies who wish to record group activities in the standard manner, using group attendance in the activity log may continue to do so, as this provides more detailed level data.

3. The OHRS Catalyst reports have been modified to account for SPI and SPGI data for residential treatment and residential supportive treatment.

Understanding the Various Time Fields on the Add Appointment Screen

Note that the system WILL allow overlapping appointments. If you attempt to save an appointment that has the same *Start Time* as an existing appointment for the same service provider a pop up box will notify you of such and ask you if this is ok. This means there is a potential to create duplicate appointments and users should be aware of this.

Note that the *Date* and *Start Time* will be automatically populated with the current date & time although not reflected on this screen shot.

How to Edit/View and Delete Appointments in the Activity Log

Note: *Pre-Entry Services* entered via the *Client Information* screen can only be viewed, edited and deleted in the Activity Log as in the following demonstration.

The Edit Options do not apply to the following fields. If for some reason the information is incorrect for any one of the following fields, the activity will have to be deleted and then re-added in order to correct the input:

- The Date
- Repeating Activity
- Chart/File #
- Client's First
- Last Name
- Admission - The Admission field is read-only and cannot be edited regardless if the appointment is deleted and re-added. If the Admission number is incorrect, the Admission Information must be corrected before the activity can be entered correctly

Module 2 - Highlights

- Input to the activity log can be done for all types of activity; activities can range from Administration, to Problem Gambling Prevention/Awareness, to Client Services Direct and Indirect to Entry Services.

- Multiple service providers can be entered for all types of activities. Up to 20 Service Providers can be added to any one activity.

- Viewing, editing or the deleting of appointments can be done by accessing any one of the Service Providers listed on the activity.

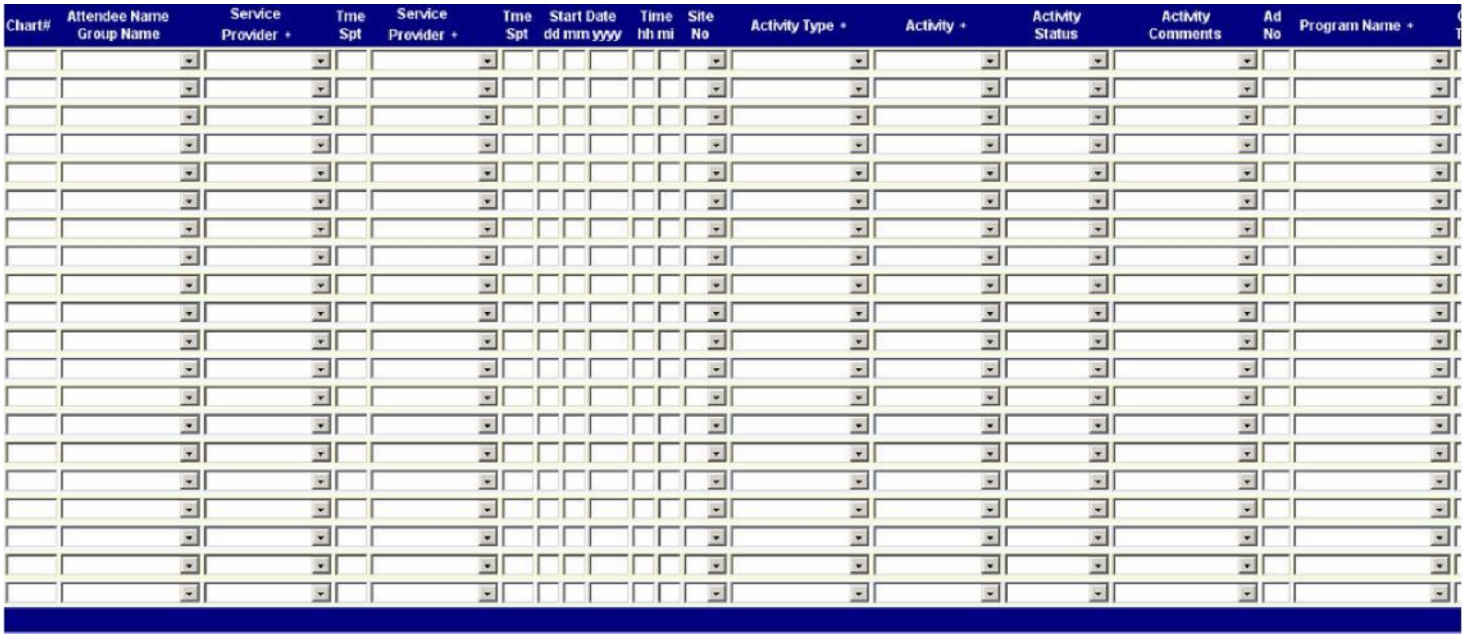
- The Functional Centre is not required to be entered by the user for *Client Services Direct* or *Indirect* when the client is registered to an open program. The FC will automatically be selected for you.

- Changes have been made with regard to Residential Services using the Activity Log.

Module 3 - Batch Entry

Batch Entry is a feature designed to allow multiple service utilization entries. There are limitations to this feature such that not everything that can be done in the Activity Log can be done using this feature but it can be a valuable time-saver for various situations.

Here is what the ***Batch Entry*** screen looks like.



When to Use Batch Entry

The Batch Entry screen was developed to better assist agencies with their data input needs.
The ability to input service utilization in bulk format was identified as a time-saving tool by a number of agencies.
The Batch Entry is presented in spreadsheet format. Also, the Catalyst screen does not have to be refreshed after each data input.
This ability to input multiple appointments is of most benefit to:

Data Input Staff dedicated to inputting service utilization for multiple service providers; service providers who input more than one activity at a time.

What is Possible with Batch Entry

- Log multiple activities for multiple service providers, for multiple clients without having to refresh the Catalyst screen after each appointment.
- Each line in the spreadsheet can be used for a different client and for different service providers.
- Log multiple appointments for up to two service providers for the same appointment, with varying activity time spent i.e. one appointment, 2 service providers with two different durations for time spent and for one client.
- You have the option to "Save" Input at any time.
- You have the option to "Delete" multiple entries before you leave the Batch Entry screen..
- You can *Start New Batch* without having to exit the *Batch Entry* Module.
- Input activity for closed clients provided the activity is within the start and end date range of a registered program. Note: this feature is available throughout the Activity Log.
- 'Not Occurred' Entry level activities are permitted.

What is Not Possible with Batch Entry

- Pending clients cannot be input with occurred time; clients must be 'registered' in a program in order for occurred input to be saved on Batch Entry.
- Entry Services (occurred) can't be entered here because Entry Services have to have a Functional Centre applied to them and there is no place to add the Functional Centre.
- Anonymous Individuals and anonymous groups are not permitted.
- Individual clients who do not have a Chart/File Number.
- *Indirect Service for Case Review - Registered Clients Only* not permitted with Batch Entry.
- It is not possible to 'Search' clients on the Batch Entry Screen.
- It is not possible to add group appointments in Batch Entry.
- Prevention / Awareness (P/A) activities are not permitted in Batch Entry. P/A activities can be linked to non-registered clients i.e. Anonymous Groups or Anonymous Clients and to 'groups' of clients who do not have an open admission.

To retrieve the list of appointments in a Batch Entry Screen once you exit the screen. You are not able to return to the completed or partially completed Batch Entry Screen. **CAUTION:** Always SAVE input before exiting. It is recommended that the Catalyst User print the screen for reference or make a note of last input to the Batch Entry Screen, before exiting.

Once a new Batch Entry screen starts, appointments saved through a previous Batch Entry screen can be edited by accessing the Service Providers' Activity Lists.

Things to Keep in Mind when Using Batch Entry

At least one service provider must have user privileges to the program and to the activity in order to save the activity.

If a Service Provider does not have access to an activity or program, the event will not be saved; if there is not enough information available to complete the entry, the *Delete Record* option provided at the bottom of the screen can be utilized in order to save, move forward and continue with input.

When there are two service providers input to a row of activity, the following two rules apply:

- When it comes to Indirect Services, the occurred Time Spent for the first Service Provider will be carried forward as the occurred Time Spent for the Client.
- If two Service Providers input 'Occurred' Time Spent, for the same activity, on the Batch Entry screen; the first Service Providers time cannot be zero, the 2nd Service Provider can be zero. This differs from the Add Appointment screen where it is possible to have the first Service Provider in the list to have a zero Time Spent.

Time spent field located after each service provider's name must be completed if the appointment occurred in order for service utilization to be applied to both service providers.

All permissions to programs or activities given to staff will be validated after you click on *Save.*

It is not necessary to exit Batch Entry in order to generate a blank Batch Entry screen. You can click *Start a New Batch* instead.

As noted in the demonstration, it is recommended that each time the Batch Entry screen is filled in, a copy be printed for your records. Use your browser's *File* menu and select *Print*.

Module 3 - Highlights

- Batch Entry provides Catalyst Users with the ability to input service utilization in bulk by way of a spreadsheet format.
- Selected Service Providers must have access to the selected activities and/or programs in order to SAVE the activity.
- The ability to delete multiple activities by using the Highlighting feature

Delete Record:

- Deleting the record, deletes the rows selected and also reduces the number of rows on the Batch Entry screen.
- Deleting the record removes the content of the row(s), reduces the number of rows on the batch entry spreadsheet and if the spreadsheet has been saved, deletes the saved activity from the Activity Lists and from the database.

- It is not possible to retrieve or return to a completed or partially completed Batch Entry Screen after exiting the screen.
- Upon exiting Batch Entry screen it is possible to edit activities by accessing the Service Providers' Activity Lists.
- Time spent field located after each service provider's name must be completed in order for service utilization to be applied to both service providers.

Groups

- It is not possible to enter group activity into the Batch Entry module

Module 4 - Adding Group Appointments in the Activity Log

Overview of Changes made to Groups in the Activity Log

The most recent type of group is the Indirect Services Group Case Review - Registered Clients Only group is available to users of the Activity Log. It will be necessary for a Functional Centre to be linked to this group activity before the activity can be saved in the Activity Log. A strong emphasis is placed on Catalyst Users familiarizing themselves with the funded FCs within their agency so that the FC and the group activity are correctly applied.

The Information Request-Group Pre-Entry Service Activity Type is no longer used by OHRS; and therefor does not have a Functional Centre linked to it. All such activities are now logged directly to the Activity Log and are linked to the Anonymous Group. Again, strong emphasis is placed on correctly applying FC information. The FC is linked to the funding applied to the worker.

Agencies currently adding activities in the Activity Log for Groups follow a set format and use the Group Attendance screen to track client activity. Catalyst Users may use groups with members already set up or may add group members on the fly. Within this tutorial, groups and types of groups are defined and detailed information is provided for the Group Attendance Screen and for the Indirect Services Activity Type as it applies to the 3 group types, Closed/Structured Groups; Mixed Groups and Open Groups.

About Using Groups in the Activity Log

There are 5 basic Group Types

Closed/Structured Groups
Members are more or less the same from session to session and appear on the group attendance list each time the group is logged.

Open Ended Groups
Members may vary from session to session. Each time a session is logged in the activity log, members are added to the *Group Attendance List* screen.

Mixed Groups
Groups that include permanent members and appear on the group attendance list each time the group is logged plus members added to the group "on the fly" to the *Group Attendance List* screen in the activity log.

Anonymous Groups
Clients are not uniquely identified and are not registered clients in the system.

Indirect Services Groups Case Review - Registered Client Only
Indirect service applied to a group of 10 clients or more; all clients are registered to Catalyst. One example, service providers meet to consult on a number of registered clients. As a whole, the team meets for an hour and a number of clients are discussed, it is not distinguishable as to how much time is spent discussing each one of the clients. To log each one of the clients with varying times of indirect service for each of the service providers in attendance would take a considerable amount of time. Therefore, total time is logged as Indirect Services Group to one Provincial Service Category/Functional Centre.

To Note: A workaround, for quick group activity data entry, has been developed to report Service Provider Group Interactions (SPGI) using the Indirect Services- Large Group (Registered Clients Only) group function in the activity log. Go to Article #390 in the DATIS Helpdesk Knowledgebase for details and instructions. Agencies who wish to record group activities in the standard manner, using group attendance in the activity log may continue to do so, as this provides more detailed level data.

Defining a group appointment as it relates to data input to Catalyst

A service provided to two or more clients at the same appointed time and in the same session by one or more service providers. The service provided can be face-to-face or it can be indirect but it cannot be Client Direct non Face to Face. In a group more than one person received service for a scheduled activity.

Group Features - Common to all Groups

- Ability to log multiple service providers for the same group appointment For each service provider, it is possible to have different Time Spent Up to 20 service providers possible per group event
- The *Time Spent* for all service providers can be added or edited by accessing the activity list of just one of the service providers
- The activities available for the appointment are the combined privileged activities of all service providers scheduled for the appointment
- The ability to *Save and Create another Activity for this Session* is available to all group types.

Group Features - Unique to Mixed/Closed and Open Groups

- Group Attendance Screen **-** to identify clients, programs and attendance.
- The Activity Status for Indirect Services is automatically carried forward to the *Group Attendance List* screen.
- Client status plays a role in how group information is input to the system i.e. whether the clients are anonymous, open, pending, incomplete or closed

Closed/Structured Groups, Open Ended Groups and Mixed Groups

The *For Group Appointments Only* section on the *Activity List - Add Appointment* screen is dedicated to these three types of groups. When first accessing the *Add Appointment* screen the Group section is typically collapsed and will have to be expanded in order to view. To do so click on the + sign beside *For Group Appointment Only* and select a group from the drop-down selection list.

The Group Attendance List screen

The Group Attendance List screen was designed specifically with these three types of groups in mind (Closed/Structured Groups, Open Ended Groups and Mixed Groups). The focal points to this screen are: the heading with Group Name, Service Date and search results; the attendance log with column headings; and the option buttons at the bottom of the screen.

*Below is a list of column descriptions and an explanation of the option buttons available:

Column headings are as follows

- Client Chart # - chart number of the client attending the group
- Client Name - the client name linked to the chart # in the first column
- Admission Number - admission linked to the programs in the next field
- Program Name - program where service will be applied
- Activity Status - blank, occurred or not occurred
- Activity Comments - outcome linked to the activity status
- Actual Time Spent Minute - service received by the client, the actual time spent for the session does not have to be the same among clients
- Visit Type - the visit type is optional and is for internal agency purpose only. Family Member with Client
  Family Member without Client
- Associated Client - this column is optional and is provided for internal agency purpose only. The only business rule applied to this column is the chart # that is input to the field must be valid on the system
- Delete (Check Box) - this check box works in conjunction with the optional Delete button at the bottom of the screen

Option Buttons available at the bottom of the table

- **Save -** if all business rules are adhered to, this option saves the information on the screen Delete - this option deletes all records checked under the column heading Delete
- **Cancel** - this option returns the Catalyst user to the *Activity List - Edit Appointment screen*. Any information not saved is cleared
- **Create Record** - this option when selected creates an additional row for client input. Use this feature if a client is added to the group and if the chart number is known to the Catalyst user
- **Add Client to Attendance List** - this option results in a client search criteria screen being displayed. The search function works the same as on other client search screens in Catalyst. Use this feature to search and add additional members to the group attendance list

Clients must be registered to Catalyst in order to schedule appointments

A client with a closed Admission can be selected in Group Activity in the same group as registered clients. When reporting, those clients are considered to be Pre-Entry Service clients in a group.
When reporting, those clients are considered Pre-entry Service clients in a group. Those activities (closed admissions or clients who have no admission that are mixed with registered clients in Group Activity will be reported under the FC of one of the other registered clients' FCs (in the same Group Activity).

For Pending Client within a group, *Occurred* Activity Status is NOT permitted. All activities for pending clients within a group must have a *Not Occurred* Activity Status.

About Using Groups in the Activity Log (Continued…)

Group Features Unique to Group Types

Anonymous Groups

The Anonymous Group section in used to record information about anonymous groups. This section is found by expanding the *For Group Appointment Only* section. More about using anonymous groups can be found in the *Anonymous Clients* module.

Features and Available Options

- Client names are not required; Catalyst users need only enter a count on the number of clients attending the group, with the available options of adding age groups and gender
- Available option to link the group activity to a FC/PSC. If the *MoH Substance Abuse/Program Gambling funded?* field is checked, a functional centre must be selected from the FC field before the activity can be saved. If the activity is not linked to a funded SA and/or PG MoH funded program, uncheck the box and either select a FC from the selection list or leave blank
- The number of anonymous clients in a group can be reported on by FC/PSC providing the information is correctly input to the system
- Number of sessions and staff hours are collected for Anonymous Groups.

Not available

- Clients are not uniquely identified. A count on unique individuals is not available, the system cannot report on repeat clients in anonymous groups

Indirect Service Group Case Review - Registered Clients Only

- This section on the appointment screen is dedicated to tracking Group Indirect Service for 10 or more Registered Clients.
- Ability to apply indirect services for registered clients as a whole to a FC/PSC Ability to collect a count on the number of clients served in the group
- The Indirect Service will not be applied directly to a Client's program but can be applied directly to a Functional Centre.

Anonymous Groups

- A count on number of anonymous clients attending a session.
- Ability to apply Group information to a FC.

Anonymous Groups

For Anonymous Groups that are linked to a MoHLTC Substance Abuse or Problem Gambling funded program, the Functional Centre field is required. If the MoH Substance Abuse/Problem Gambling field is not checked, the service will not be applied to a funded MoHLTC FC. For non MoH funded programs the Functional Centre field is NOT required in order to save. Remove the check from the check box. Selecting a Functional Centre is optional for non MoH SA & PG programs.

Module 4 - Highlights

- There are 5 basic Group Types: Closed/Structured Groups, Open Ended Groups, Mixed Groups, Anonymous Groups and Indirect Services Groups Case Review **-** Registered Client Only.

All Groups

- Ability to log multiple service providers for the same group appointment. For each service provider, it is possible to have different Time Spent. Up to 20 service providers possible per group event.
- The *Time Spent* for all service providers can be added or edited by accessing the activity list of just one of the service providers.
- The activities available for the appointment are the combined privileged activities of all service providers scheduled for the appointment.
- The ability to *Save and Create another Activity for this Session* is available to all group types.
- Client status plays a role in how group information is input to the system i.e. whether the clients are anonymous, open, pending, incomplete or closed.

Closed/Structured Groups, Open Ended Groups, Mixed Groups

- All Clients must be linked to a program in order for the activity to occur. For closed clients, the activity must occur within the program Start and End dates**.**
- For Pending Client within a group, *Occurred* Activity Status is NOT permitted. All activities for pending clients within a group must have a *Not Occurred* Activity Status.

Anonymous

- The number of anonymous clients in a group can be reported on by FC/PSC providing the information is correctly input to the system.

Number of sessions and staff hours are collected for Anonymous Groups.

Indirect Service Group Case Review - Registered Clients Only

- This section on the appointment screen is dedicated to tracking Group Indirect Service for 10 or more Registered Clients.
- Ability to apply indirect services for registered clients as a whole to a FC/PSC**.**
- The Indirect Service will not be applied directly to a Client’s program but can be applied directly to a Functional Centre.

Module 5 - Reports (Related to the Activity Log)

Reports Related to Activity Log Data

There are several reports available that allow users to look at data entered into the activity log in various ways.

Compiled on the next page is a list of all available reports that are generated using activity log data. Two of the main reports are:

- *PR-07S Service Utilization Statistics Summary by Provincial Service Category*
- *OHRS Reporting - Statistical Accounts for Client Activity*

This module will briefly outline using these two reports and how the data entered into the activity log will translate into data reported to the Ministry.

The ability to run reports is available to all Catalyst users who have a report account.

For a Catalyst user to obtain a report account, a Catalyst System Administrator (CSA) or the Agency Director must complete and submit to DATIS Helpdesk a form for *Request to Change User Access to Reports* specifying the report folders for which access will be given.

Upon receipt of the form, DATIS will provide access to the requested folders. To complete the process, a Catalyst User with Agency Administrator status must update your user profile by selecting the *Reports: Can View* checkbox in the *User Privileges* screen of the *User Maintenance* module.

Reports Related to Activity Log Data (continued)

The following lists all reports within Catalyst that contain information on Activity Log entries

- **AG- 14**: Entry Services Summary
- **CL-09**: Service Details by Client
- **CL-10**: Service Summary by client (summarizes the Service history for selected client)
- **CL-15**: Group Attendance by Group Name
- **CL-16**: Service Details by Program Report
- **CL-18**: List of Client Programs and Outstanding Appointments by Admission Status
- **CL-19**: Entry Service Details
- **CL-20**: List of Client Appointments
- **C L-22**: List of Anonymous Client/Group Appointments
- **CL-25**: Clients with Assessment Activities by Program
- **DC-03**: List of Clients with Terminated Programs without Service Information
- **DC-11**: Group Appointments with Attendance Problems
- **DC-12**: List of Clients/Staff Where the Appointment is Greater Than a Specified Number of Minutes
- **DC-13A**: Program Registrations Where the First Occurred, Direct Service Activity is One or More Days After the Program Start Date
- **DC-13B**: Program Registrations with No Occurred, Direct Service Activity
- **OHRS** (formerly MIS) Reporting - Statistical Accounts for Client Activity
- **OHRS** (formerly MIS) Reporting – Statistical Accounts for Client Activity – **Details**
- **OHRS** (formerly MIS) Reporting - Statistical Accounts for Client Activity - **Program Level**
- **PR-07_FC**: Service Utilization Statistics by Functional Centre
- **PR-07S_FC:** Service Utilization Statistics Summary by Functional Centre
- **PR-10:** List of Activities
- **ST-01**: Activity Log Details by Staff Person
- **ST-02**: Service Summary by Staff (Lists the service summary of the selected staff)
- **ST-03**: Service Summary for All Staff

Note: There are Data Download Reports available to users who have access to this folder. Please note that DATIS does not support the DD reports beyond exporting them.

- **DD-03**: Client Information
- **DD-06**: Pre-Admission Service History
- **DD-11**: Activity Log - Appointment Information
- **DD-13**: Activity Log - Group Attendance (includes pre-admission services)

PR-07S_FC Report

One of the valuable features of the PR-07S_FC Report is that it will allow you to conduct checks and balances on the data that is entered into the Activity Log.

In order to see appointments/activities, sessions & hours, entry service information and Program Administration information in the applicable sections of the PR-07S Report, data must be entered into the Activity Log.

Further to entering program data into the Activity Log, the *auto calc* feature must be turned on for each program.

This linking of programs to the Activity Log and the dedicated use of the Activity Log to input client data will be reflected in the Programs Terminated columns of the PR 07S_FC report.

By using the activity log and by the timely terminating of programs, averages become available for terminated programs on Direct Services, Indirect Services, Number of Sessions and the length of days in a program.

The PR-07S_FC reports are expanded to include Other Services. This enhancement provides agencies with a means to extract information input by PSC/FC for the two clients 0M - Anonymous Male and 0F - Anonymous Female, along with service information input to Anonymous Groups.

Pre-Entry Services

Note: if you are not using the Pre-*Entry Services* in Catalyst, you will get a message on the PR-07S report that states no *Entry Services were provided during this period.*

Program Administration

The total number of hours of Administration Program reported by all staff covers all agency programs including non MoH Problem Gambling and/or Substance Abuse funded programs and represents ALL Services provided during the reporting period regardless of the Site number or program type. This section includes ALL program administration time spent on gambling, substance abuse and other programs.

Remember, the Activity Log is the only means of collecting Program Administration data: if your agency is not entering it, it does not get counted.

OHRS Reporting Statistical Accounts for Client Activity

OHRS (formerly MIS) Reporting - Statistical Accounts for Client Activity is another important report where use of the Activity Log plays an integral role.

For 3 statistical accounts where previously you would have seen *NA - not available in the MIS Report* services will now be reported provided input has occurred to the activity log. You will also now see either a 0 or another count on services provided.

Relevant Statistical Accounts

S.450. Visit Face to Face In House total number of "occurred" Direct Service face to face sessions (that lasted longer than 5 minutes) for individual activities associated with all programs in an FC during the reporting period. Sessions with anonymous clients are excluded. Only one visit is reported per service recipient per functional centre per day. For programs that are set to not use the Catalyst Activity Log (auto-calc = 'N'), the number of sessions is normally reported on program termination.

S.451. Visit Non Face to Face In House total number of "occurred" Direct Service non face to face sessions (that lasted longer than 5 minutes) for individual activities associated with all programs in an FC during the reporting period. Sessions with anonymous clients are excluded. Only one visit is reported per service recipient per functional centre per day. For programs that are set to not use the Catalyst Activity Log (auto-calc = 'N'), the number of sessions is normally reported on program termination.

For **S.450 and S.451,** prior to January 28, 2010, this account was based on the site # of the service provider. Since all service providers are now assigned to "01", this account is now based on the service site which is the site # where the activity was held. Also, prior to August 5, 2010, clients with chart #s as null are excluded. Prior to April 1, 2012, OHRS included group activities in the visits accounts, and each session during a day was counted as a visit. As of April 1st, 2012, **<u>group activities are excluded from visits, and all sessions during a day in an FC are counted as 1 visit.</u>**

S.452. Not Uniquely Identified Service Recipient Interactions number of face to face or non-face to face activities with anonymous **<u>clients whether seen as individuals or in groups</u>**. Prior to April 1, 2009, the report displays N/A as Catalyst did not collect this information. N/A is also displayed if the report date range contains any portion prior to April 1, 2009. Also, prior to January 28, 2010, this account was based on the site # of the service provider. Since all service providers are now assigned to "01", this account is now based on the service site which is the site # where the activity was held. As of July 30, 2010, telephone activities will be included.

S.455. Individuals Served by Functional Centre number of distinct individuals with at least one open program registration (carried over or new) in a functional centre during the reporting period. Please note that the sum of the numbers in the age groups may not equal the total number because the age is calculated based on the admission date. If a client has two admissions where his/her age falls into two different age groups at the time of the admissions, then the report counts one admission for each age group but only ONCE in the total column. Prior to August 5, 2010, clients with chart #s as null are excluded.

S.49110. Group Participants, non-registered Client Attendance** number of clients in an anonymous group. Prior to April 1, 2009, Catalyst did not record the number of clients in an anonymous group, therefore, the report displays N/A prior to this date. If the report date range contains any portion before April 1, the report still displays N/A. Reporting by age is not an OHRS (formerly MIS) option for this account. Also, prior to January 28, 2010, this account was based on the site # of the service provider. Since all service providers are now assigned to "01", this account is now based on the service site which is the site # where the activity was held.

S.49120. Group Participants, Registered Client Attendance** number of clients that attended a group session as registered clients. This information is not available for programs that are set to not use the Catalyst Activity Log (auto-calc = 'N'). Also, prior to January 28, 2010, S.451 were based on the site # of the service provider. Since all service providers are now assigned to "01", this account is now based on the service site which is the site # where the activity was held. Also, prior to January 28, 2010, this account was based on the site # of the service provider. Since all service providers are now assigned to "01", this account is now based on the service site which is the site # where the activity was held. As of January 28, 2014, group appointments recorded in the Large Total field for residential pilot agencies is now included. Due to this, the sum of age groups may not tally with the total in the age groups. UPDATED

S.4920010. Group Sessions (number of group sessions) total number of group sessions that "occurred" during the reporting period and that are associated with a program within an FC. This number includes anonymous groups. This information is not available for programs that are set to not use the Catalyst Activity Log (auto-calc = 'N'). Reporting by age is not an OHRS (formerly MIS) option for this account. Also, prior to January 28, 2010, this account was based on the site # of the service provider. Since all service providers are now assigned to "01", this account is now based on the service site which is the site # where the activity was held. As of January 28, 2014, group appointments recorded in the Large Total field for residential pilot agencies is now included. UPDATED

Module 5 – Highlights

- Reports are accessible to users with a Reports Account
- PR-07S and MIS Reporting allow for checks and balances of the data entered into the Activity Log
- Data input for Anonymous Clients and Anonymous groups, when accurately logged to the activity log, can be reported on by Service and/or FC
- The OHRS report has the capability of reporting on additional statistical accounts for anonymous clients and groups.

Module 6 - Anonymous Clients - Individuals & Groups/Prevention/Awareness Problem Gambling

Anonymous Clients and Data Quality

If the Anonymous Client data is not input correctly, the Functional Centre data may be skewed as a result.

If agencies use a Functional Centre for anonymous clients erroneously there is no alert to highlight the mistake or even know it was a mistake. The totals for the two accounts S452 and S491 will show the counts as logged in the Activity Log. The OHRS report does not show "N/A" in the total column for these two accounts; it shows zero or > 0.

Using Anonymous Clients - Individuals

DATIS has provided each agency with two anonymous chart/files; one for females and one for males. These files are for agencies to capture data provided to clients whose identity is not known.

The two files have been given the chart/file numbers **0F** (as in zero) for **Female Anonymous** and **0M** (as in zero) for **Male Anonymous**.

Remember the anonymous chart/file numbers use the number ‘0’ *zero* and not the character ‘o’ sounds like *oh*.

You will not be able to edit the 0M or 0F files. You can access the Activity Log through the link *Save and Enter Entry Services*. You cannot admit the *Male* and *Female Anonymous* clients.

The Site Number chart/file #s 0M and 0F will always be Site 01.

These records cannot be DELETED.

Do not create additional anonymous chart/files. This will result in skewed data in reports.

Problem Gambling and Prevention Awareness

Prevention Awareness is reported in its own Functional Centre: 725507820

For an agency to get credit for this Functional Centre, the Activity Type of Prevention/Awareness must be selected, the “MoH Substance Abuse/Problem Gambling funded?” field must stay checked and the FC selected in the Functional Centre field.

Problem Gambling Prevention/Awareness - data entry can be entered for this activity type without choosing an individual or group.

Module 6 – Highlights

- Services provided to clients who wish to remain anonymous can be recorded as anonymous individuals or as a group. The Functional Centre for which services are applied is selected by the Catalyst User at the time of input.
- Pre-Entry Service appointments for anonymous individuals are recorded by way of the **Female Anonymous** or **Male Anonymous** *Client Information* screen.
- If the Anonymous Client data is not input correctly, the Functional Centre data may be skewed as a result.
- For Anonymous Groups that are linked to a MoHLTC Substance Abuse or Problem Gambling funded program, the Functional Centre field is required. If the MoH Substance Abuse/Problem Gambling field is not checked, the service will not be applied to a funded MoHLTC Functional Centre.
- Prevention Awareness is reported in its own Functional Centre. Data entry can be entered for this activity type without choosing an individual or group.