



Business Process Webinar

**Developing a process for using IAR to
support your work with Clients**



What best describes your role(s) in your organization?

- a. Direct Service Staff
- b. Trainer
- c. Manager
- d. Administrative Staff
- e. Other





Do you currently use IAR in your work?

- a. Yes
- b. No



Webinar Agenda

1. Overview
2. Benefits of using the IAR as a viewer
3. Tools to support the development of a process/procedure for using IAR to support client care
4. Case Studies of Health Services Provider (HSP) organizations' procedures for IAR use
5. Next Steps: develop or review your procedure for IAR

Why a session on developing a process/procedure for using IAR?

Lessons learned from past implementations:

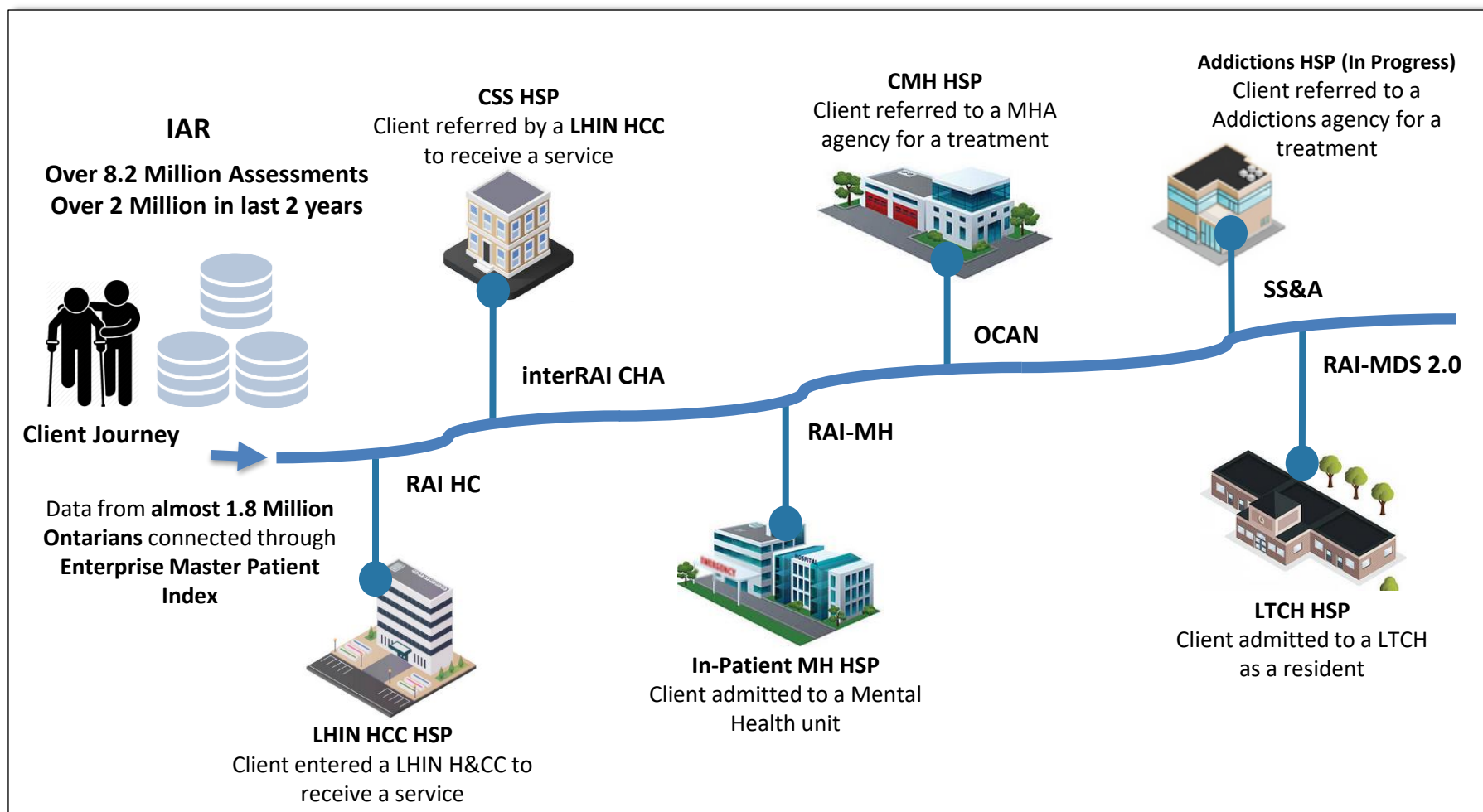
- Regular use of IAR provides access to client assessments to inform the service you provide to your clients
- Health Service Provider (HSP) organizations that find the most value in IAR have incorporated the use of IAR as part of their work flow



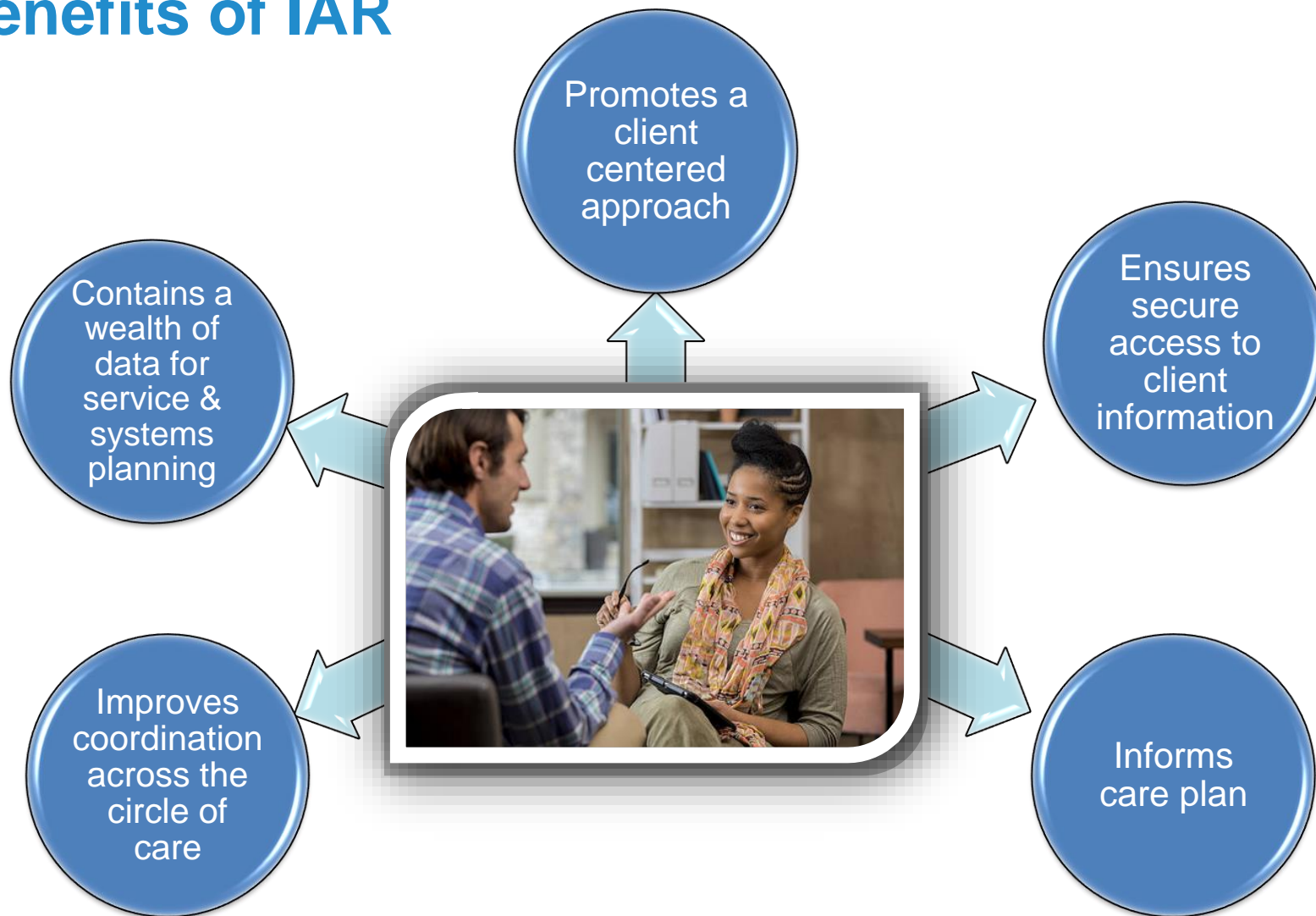
Benefits of IAR

Using IAR to understand the Client journey

The IAR Data set can tell us about the Client Care Journey. Client assessments data is captured and uploaded in IAR from across the continuum of care.



Benefits of IAR



Comments from HSPs using IAR

“Using IAR makes it easier to exchange information between health care providers. It improves efficiency by saving clinicians time they spend tracking down information”

Canadian Mental Health Association (CMHA)

“The IAR allows staff to have more of a history and build on the client’s story. It improves coordination across the client’s circle of care.”

University Health Network (UHN)

IAR: Easy access to information, why not?

Sector	Common Assessment	Accessible Information	Example
Addictions	Staged Screening & Assessment (SS&A): 3 Screeners & GAIN Q3 MI ONT	Screeners identify addictions and mental health issues. Recommendation and Referral Summary (Q3RRS) outlines evidence-based treatment recommendations based on problem severity and service utilization.	Stacey's work and education has been affected by her addiction. She has missed quite a few days in her part-time job and her grades are declining.
Community Mental Health	Ontario Common Assessment of Need (OCAN)	Client needs in a range of psychosocial determinants of health are rated by "No Need", "Met Need" and "Unmet Need".	Stacey uses alcohol daily and symptoms of anxiety prevent her from socializing. The OCAN identifies unmet needs in the domains of "Alcohol" and "Psychological Distress"
In-patient Mental Health	RAI – MH	Reason for client's admission to hospital and their status at discharge to support the transition back to the community	Stacey was admitted to hospital after expressing thoughts of suicide
Community Support Services	interRAI PS, interRAI CHA	Level of functioning and service required to support client's activities of daily living	Stacey requires support with meal preparation
Home and Continuing Care	interRAI CA, RAI-HC / interRAI-HC	Level of functioning and service required to support client's activities of daily living	Stacey needs assistance with medications
Long Term Care Homes	RAI – MDS 2.0	Level of functioning for elderly clients living in long term care homes	Stacey is independent with dressing and bathing

Understanding the Client's story (Q3RRS)

Betty

- 17 years old, referred for addictions counselling
- **Summary of status:**
 - Pregnant
 - low attendance and grades at school
 - regular use of alcohol and marijuana
 - symptoms of depression and anxiety
- **Summary of Recommendations:**
 - Referral for pre-natal care and new mother's group
 - Review Betty's progress in current services related to substance use problems and explore options for more intensive services to reduce increased risk related to pregnancy
 - Referral to CBT for depression and anxiety



Videos: Mock Client Scenarios

Click [HERE](#) to access three 10 minute videos on examples of using IAR

IAR Systems

On this page

- [Overview](#)
- [IAR \(Integrated Assessment Record\)](#)
- [AEM \(Assessment Entry Module\)](#)

Overview

The **Integrated Assessment Record (IAR)** tool provides a central repository for clinical assessment data collected from multiple community care sectors. It allows authorized Health Service Providers (HSPs) within the circle of care to upload and view a client's assessment information in a secure and timely manner. The IAR enables collaborative care planning as well as enhanced communication between providers, for the ultimate goal of promoting high quality care for clients in the community.

IAR allows authorized HSPs to upload and view the following assessment information across multiple sectors:

Sector	Assessments
Inpatient Mental Health	Resident Assessment Instrument – Mental Health (RAI-MH)
Long Term Care Homes	Resident Assessment Instrument – Minimum Data Set (RAI-MDS 2.0)
Community Support Services	interRAI Preliminary Screener for Primary and Community Care Settings (interRAI-PS) interRAI Community Health Assessment (interRAI CHA)
LHIN Home and Continuing Care	Resident Assessment Instrument – Home Care (RAI-HC), interRAI Home Care (interRAI-HC), interRAI Contact Assessment (interRAI CA)
Community Mental Health	Ontario Common Assessment of Need (OCAN)
Community Addictions	Staged Screening and Assessment (SS&A)

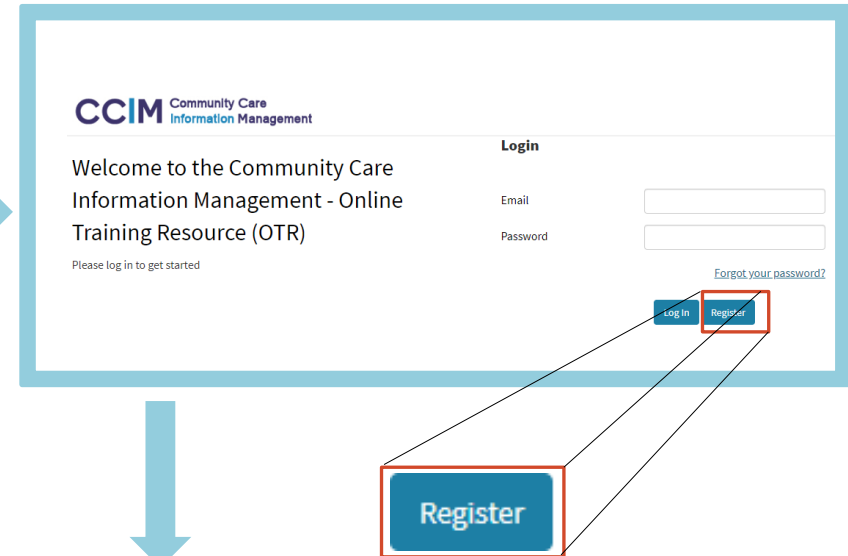
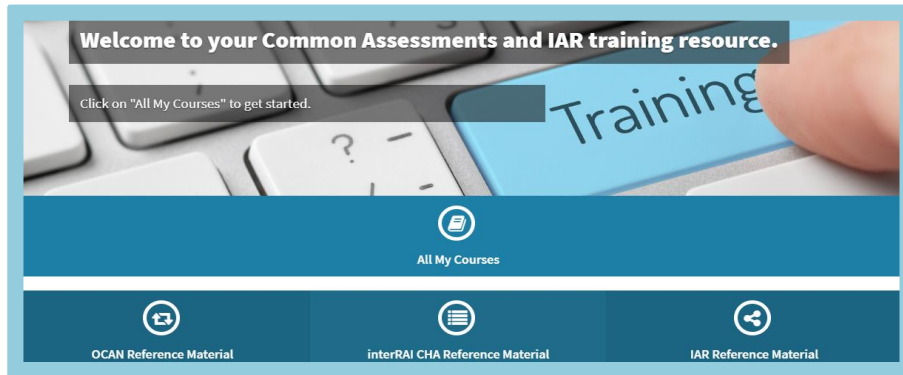
***Once you're on the CCIM website, scroll partway down the screen and click here to start the videos**

- **VIDEO: Addictions sector – Using IAR to support client care video** (Click here for the accessible Addictions sector video with captions)
- **VIDEO: CSS sector – Using IAR to support client care video** (Click here for the accessible CSS sector video with captions)
- **VIDEO: CMH sector – Using IAR to support client care video** (Click here for the accessible CMH sector video with captions)

Making Training Easier: Self-Directed eLearning

Click [HERE](#) to access new interactive eLearning

Tip: use Google Chrome



All My Courses

Enrollment into new courses might take some time: We will send you an email notification when your new courses are ready.

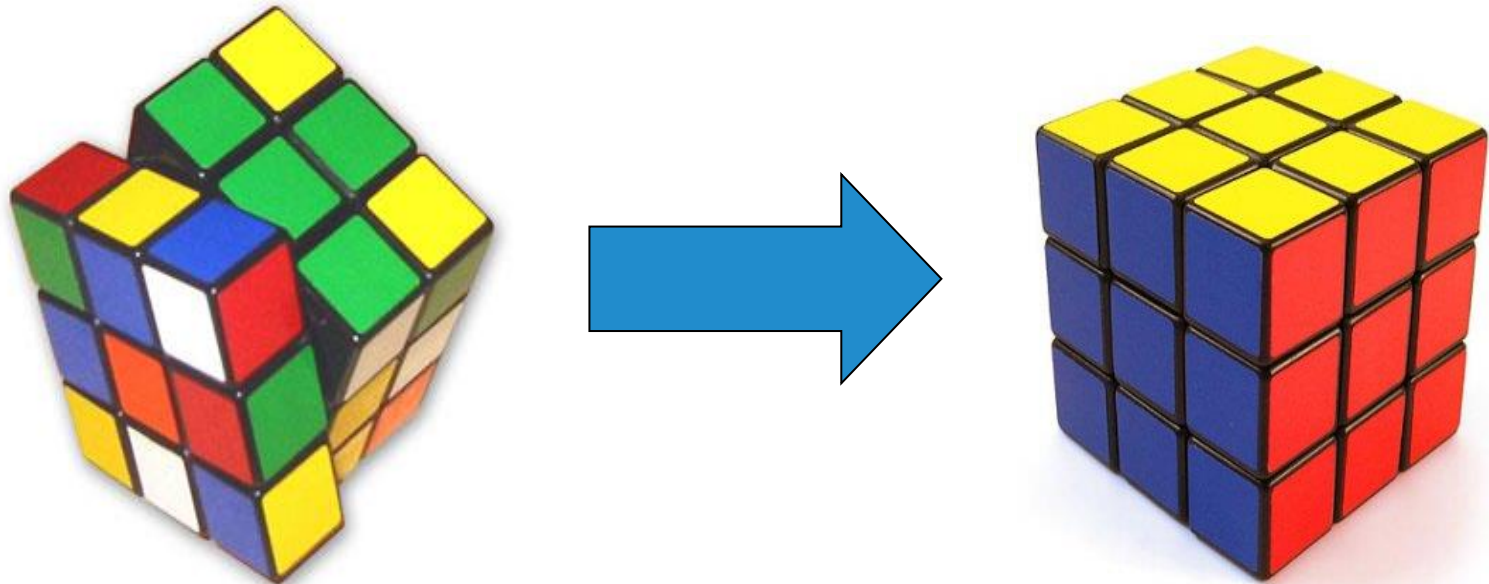
Active Completed

Your Learning Path	Progress	Average Score for the Completed Activities	
IAR Application Training new	0% Completed	0%	Details
IAR Technical Training new	0% Completed	0%	Details
OCAN Tool Training	63% Completed	0%	Details

Developing a process for IAR Use

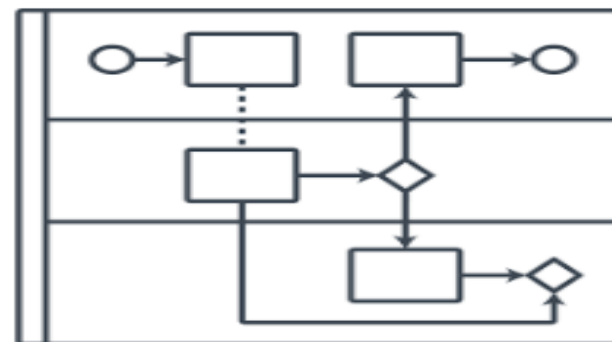
What is a Business Process?

A series of connected tasks that, once completed, achieves a goal



Tools to help develop processes/procedures

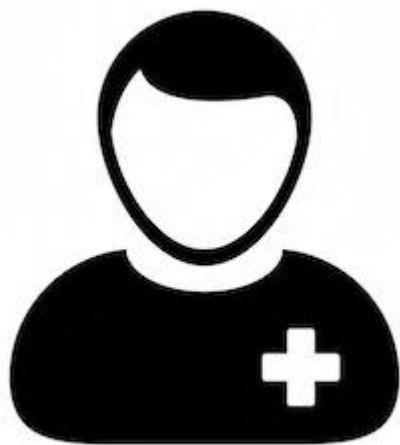
1. Business Process Mapping



2. Business Process Chart

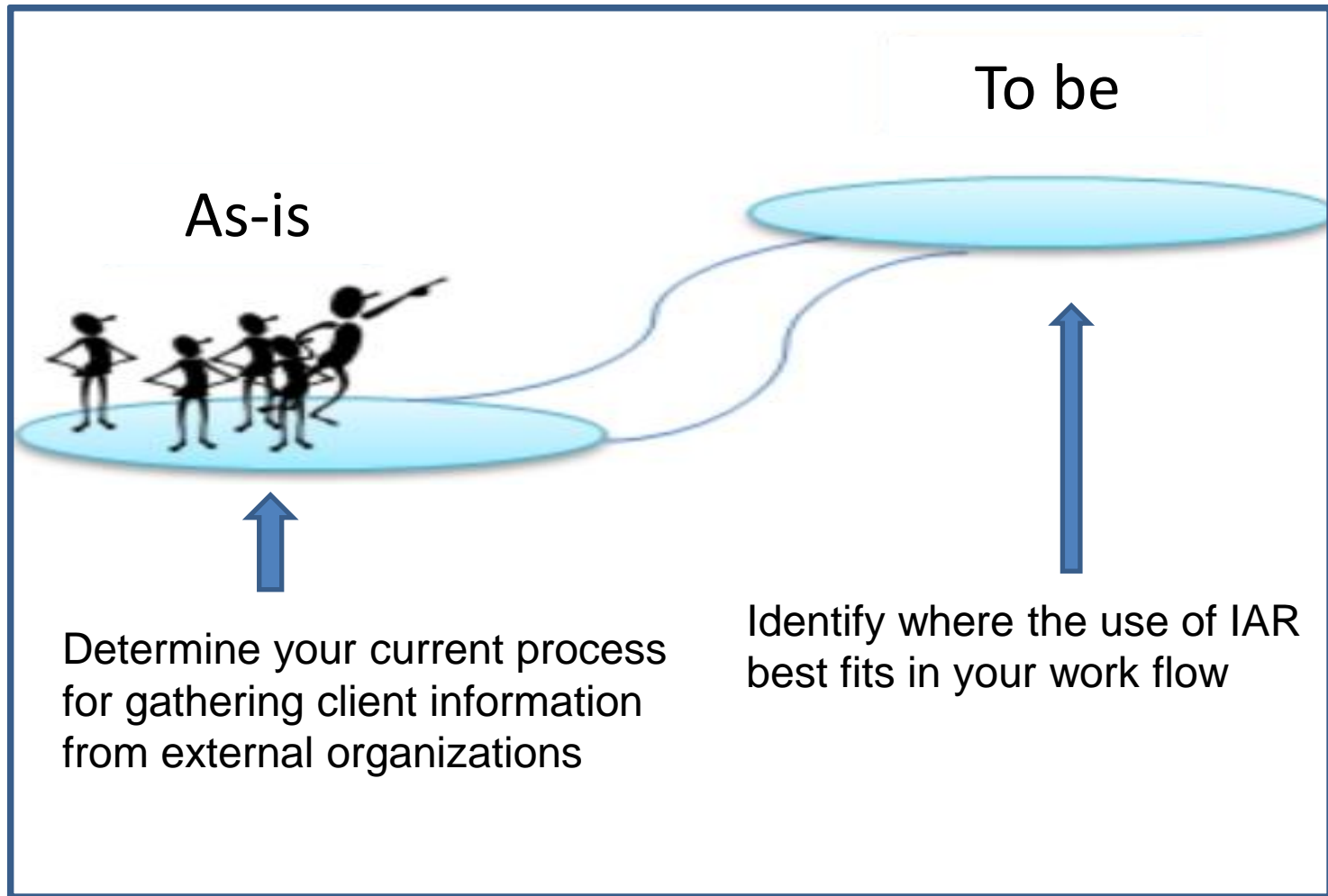
Task	Who/Role	Document

What is the goal for using IAR?



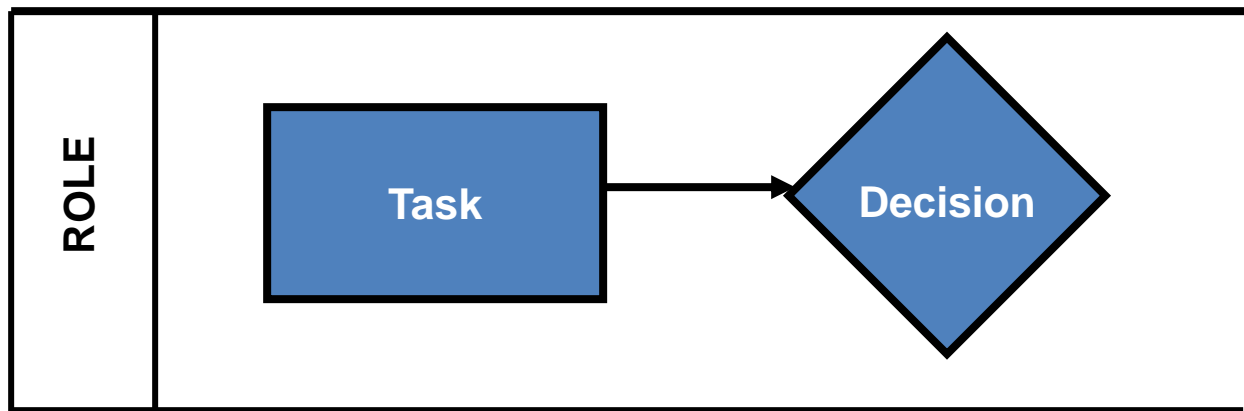
To learn about the client and their interactions with other services to inform your work and improve the client's experience

How do you develop a business process for IAR use?



Business Process Mapping

- ✓ A method that can be used to map a business process
- ✓ Has a starting point and an end point
- ✓ Set out the beginning and end tasks
 - Then ask ... “And then what”?
 - Consider tasks, decisions and roles
 - Note any bottlenecks / barriers separately – which parts least benefit the client





Are you familiar with business process mapping?

1. Yes
2. No



How to map a Business Process

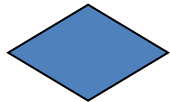
The following symbols are commonly used in a Business Process Map:



Activity/Task



Start



Decision



Direction of flow



Form/document

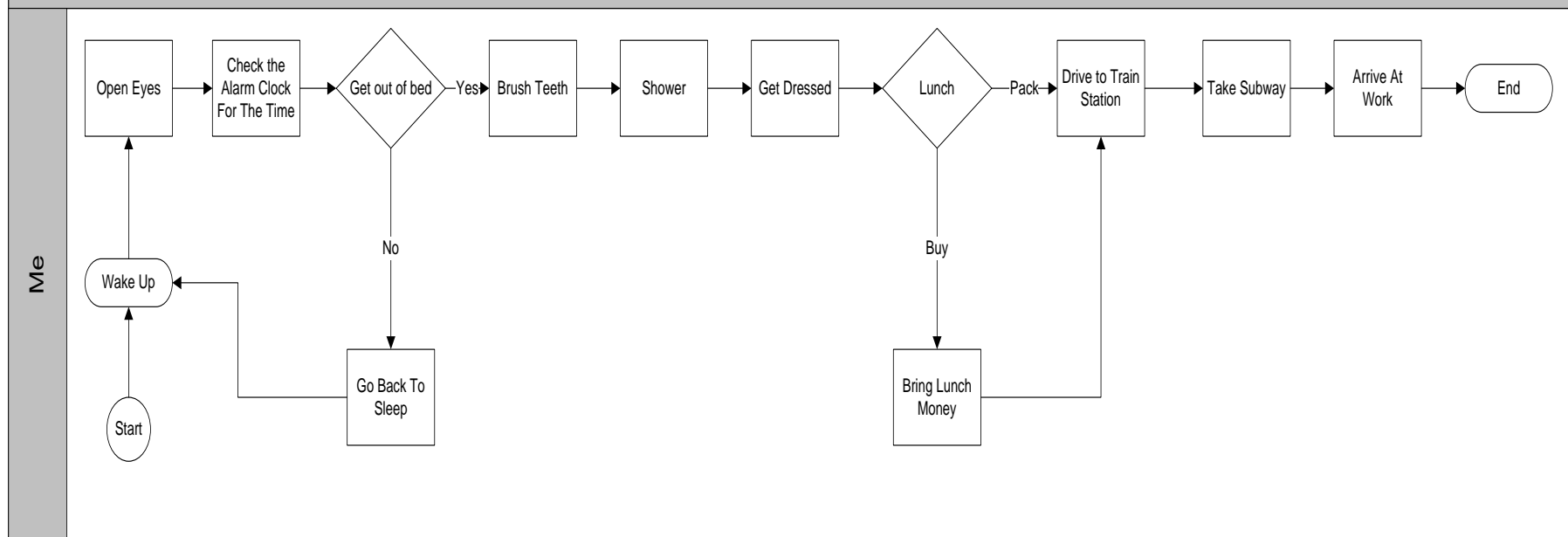


End

Business Process Mapping example

Scenario 1: Wake up in the morning and go to work

What I Do When I Wake Up In The Morning



Activity/Task



Decision



Form/document



Start



Direction of flow



End

If Business Process Mapping is not your “thing”

Use a Business Process Chart:

- ✓ Another method that can be used to describe a business process
- ✓ Uses a chart to identify each task, the role responsible and the form/document used (if applicable)

Scenario 2: Get to work and prepare for your morning meeting

Task	Who/Role	Form/Document
Print Agenda	Team Leader	Agenda
Make Photocopies of the agenda	Administrative Assistant	Agenda
Prepare the Coffee	Administrative Assistant	
Record Attendance	Staff member	Attendance Sheet
Review the agenda with the team	Team Leader	Agenda

”

An HSP's procedure for using IAR with new and existing Clients

1. **Business Process Maps**
2. **Business Process Chart**

Procedure for a new Client

Using IAR in Assertive Community Treatment (ACT) TEAM

Sharon Blom



**Canadian Mental
Health Association**

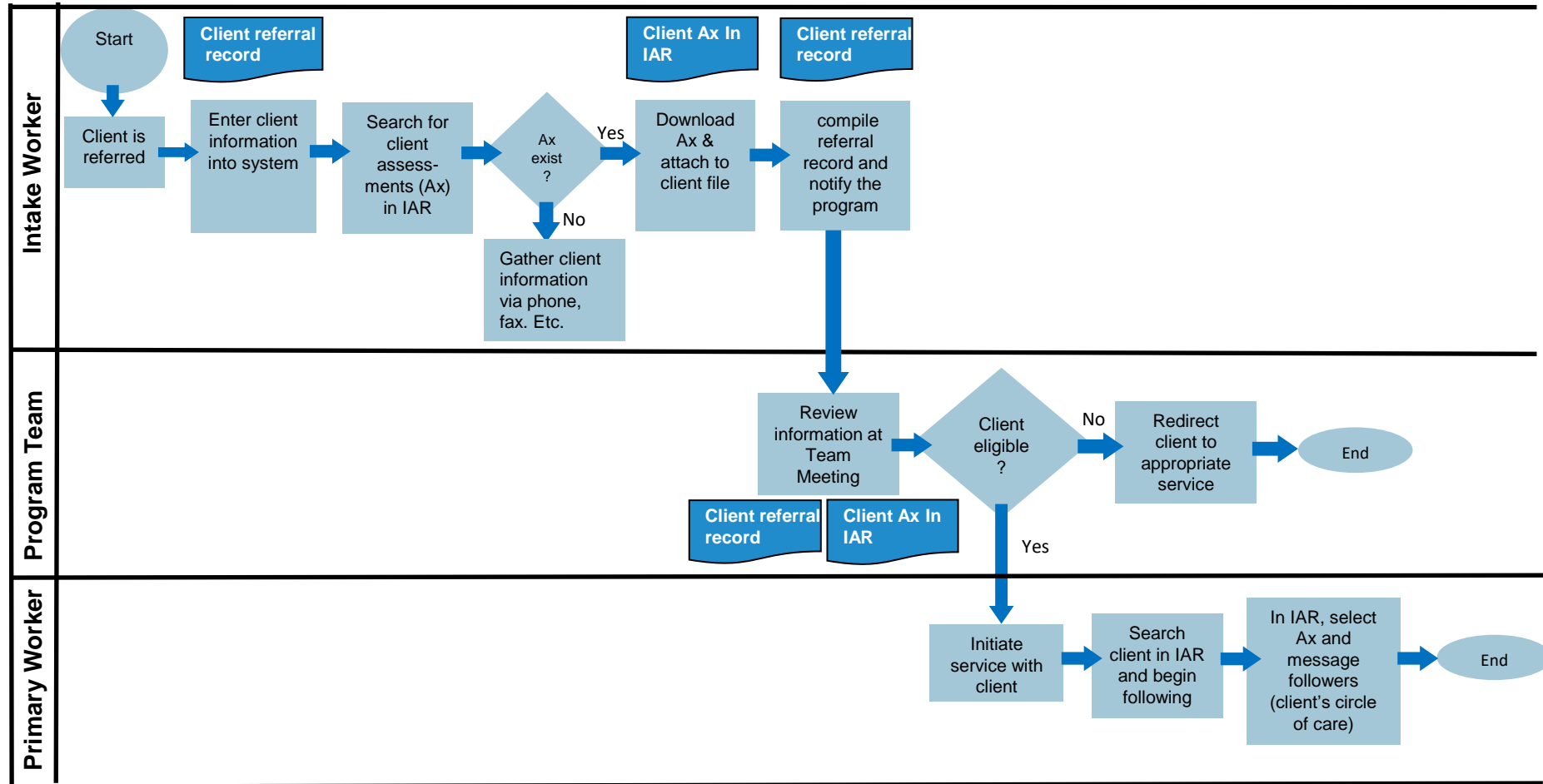
New Client Example

New Client: Melvin, is referred to ACT

- **The Intake worker searches on IAR and finds an OCAN completed by a previous organization working with Melvin**
The intake package identifies Melvin, does not speak English, has a diagnosis of schizophrenia, is on ODSP, is paying market rent, and has serious physical health issues.
- **This information helped the clinician to:**
 - *Book an interpreter quickly for an initial intake meeting*
 - *Begin work on pressing financial and time sensitive medical goals*



Business Process Map: Using IAR for a new Client



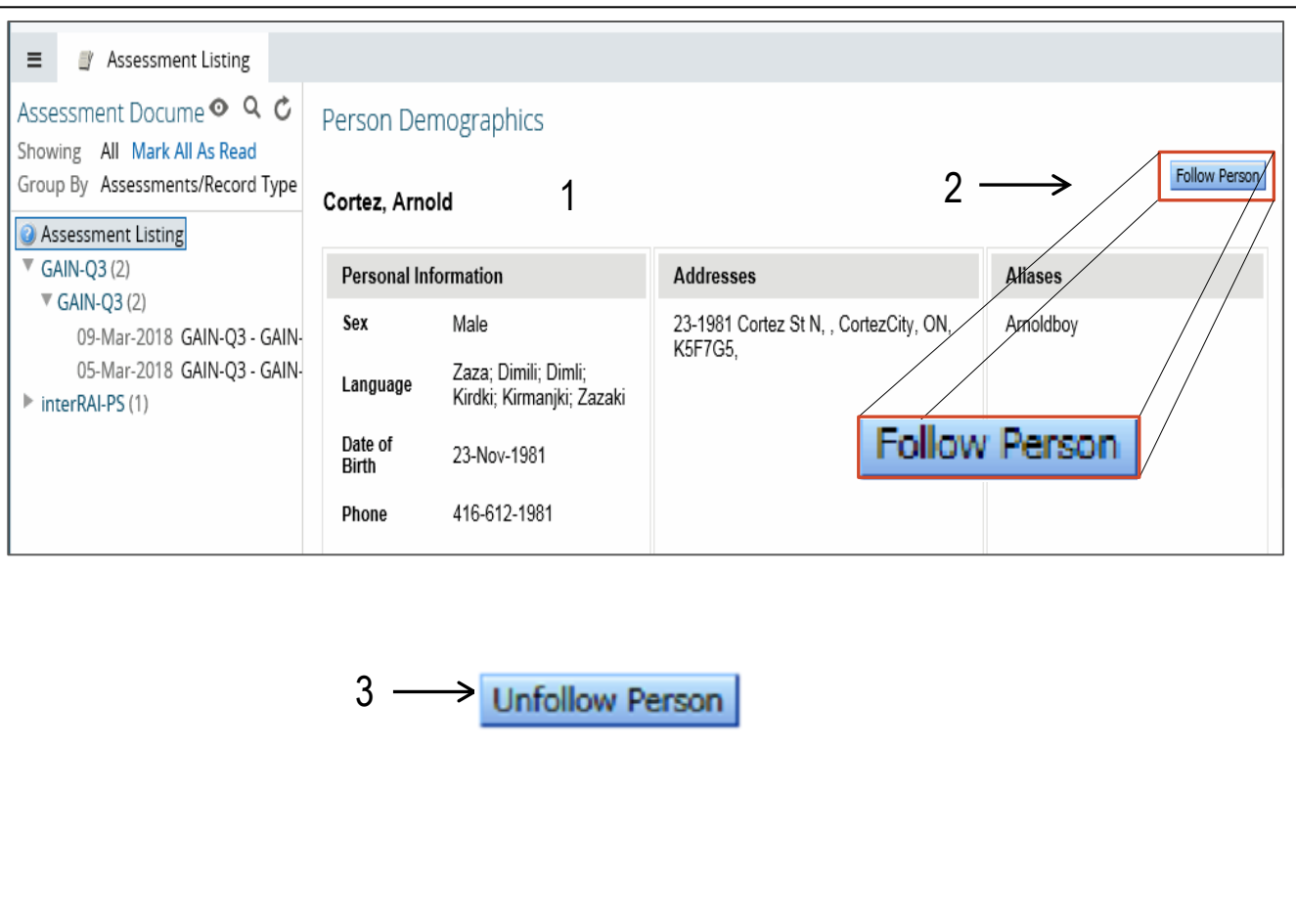
Follow / Unfollow a person

To follow a Person:

1. Verify that you are viewing the correct person
2. Click the Follow Person button

To Unfollow a Person:

3. Click the unfollow Person button



The screenshot shows the 'Assessment Listing' interface. On the left, there is a sidebar with 'Assessment Listing' selected. The main area displays 'Person Demographics' for 'Cortez, Arnold'. The interface is divided into three columns: 'Personal Information', 'Addresses', and 'Aliases'. The 'Personal Information' column shows 'Sex: Male', 'Language: Zaza; Dimili; Dimli; Kirdki; Kirmanjki; Zazaki', 'Date of Birth: 23-Nov-1981', and 'Phone: 416-612-1981'. The 'Addresses' column shows '23-1981 Cortez St N, , CortezCity, ON, K5F7G5,'. The 'Aliases' column shows 'Arnoldboy'. A red box highlights the 'Follow Person' button in the top right corner, with an arrow labeled '2' pointing to it. Another red box highlights the 'Follow Person' button in the bottom right corner, with an arrow labeled '3' pointing to it. A third red box highlights the 'Unfollow Person' button in the bottom right corner, with an arrow labeled '3' pointing to it.

Messaging from within an assessment

To message followers from within an Assessment:

1. Click the Message Followers button
2. Select the followers to message from IAR Users Following list
3. Click Continue
4. Type your message
5. Click the Send button

OCAN - Reassessment (6 months ago) Print

Jump to section: Top Assessment Detail Summary Message Followers

Start Date: 2016-12-02
Completion Date: 2016-12-08 Assessment Type: OCAN FULL Record Type: Reassessment

1. OCAN Lead Assessment
OCAN completed by OCAN Lead? **TRUE - Yes**

2. Reason for OCAN*
Reason for OCAN **RA - Reassessment**

3. Consumer Self Assessment Completion
3a. Was Consumer Self-Assessment completed? **FALSE - No**
3b. If the Consumer Self-Assessment was not completed, why not?

IAR Users Following Garth Brooks

<input type="checkbox"/>	Last Name	First Name	User ID	Org. Name(s)
<input type="checkbox"/>		Umar	Alviewer	PEMBROKE REGIONAL HOSPITAL, ALPHA COURT NON-PROFIT HOUSING CORPORATION
<input type="checkbox"/>	IAR	Demo	Demo	PEMBROKE REGIONAL HOSPITAL, ALPHA COURT NON-PROFIT HOUSING CORPORATION

Continue Cancel

To... Demo
Importance Normal
Subject IAR - BROOKS, Garth- OCAN assessment
Attachment OCAN (Person Summary - IAR SIT)

Message

☒ Word Wrap

Send

Business Process Chart: Using IAR for a new Client

Tasks	Who	Document
Client is referred: Enter client information into system	Intake Worker	Client referral record
Search for client assessments (Ax) on IAR	Intake Worker	
Download client's Ax from IAR and attach to client file	Intake Worker	client's Ax in IAR
Compile the referral record and notify the program	Intake Worker	client referral record
Review information at Team Meeting to determine eligibility	Team Members	client's Ax in IAR and client referral record
Eligible: initiate service	Primary Worker	
Search client in IAR and begin following	Primary Worker	
In IAR, select Ax and message followers (client's circle of care)	Primary Worker	



Procedure for an existing Client

Existing Client Examples

Existing client, Susan, is hospitalized

- **The service provider receives a notification that a new assessment is available. The service provider checks IAR and finds a interRAI HC completed while Susan was in hospital – the common assessment completed by Home and Community Care (H&CC). The assessment identifies that:**
 - *Susan had a stroke. She can walk independently, but requires support with ordinary housework and meal preparation.*
 - *Susan will receive physical and occupational therapy*
 - *Susan's mood has deteriorated – increased symptoms of depression*

This information helped the service provider to:

- *Connect with the H&CC worker and inpatient social worker to collaborate on a discharge plan from hospital*
- *Consider the impact that her physical health condition can have on her mental health*

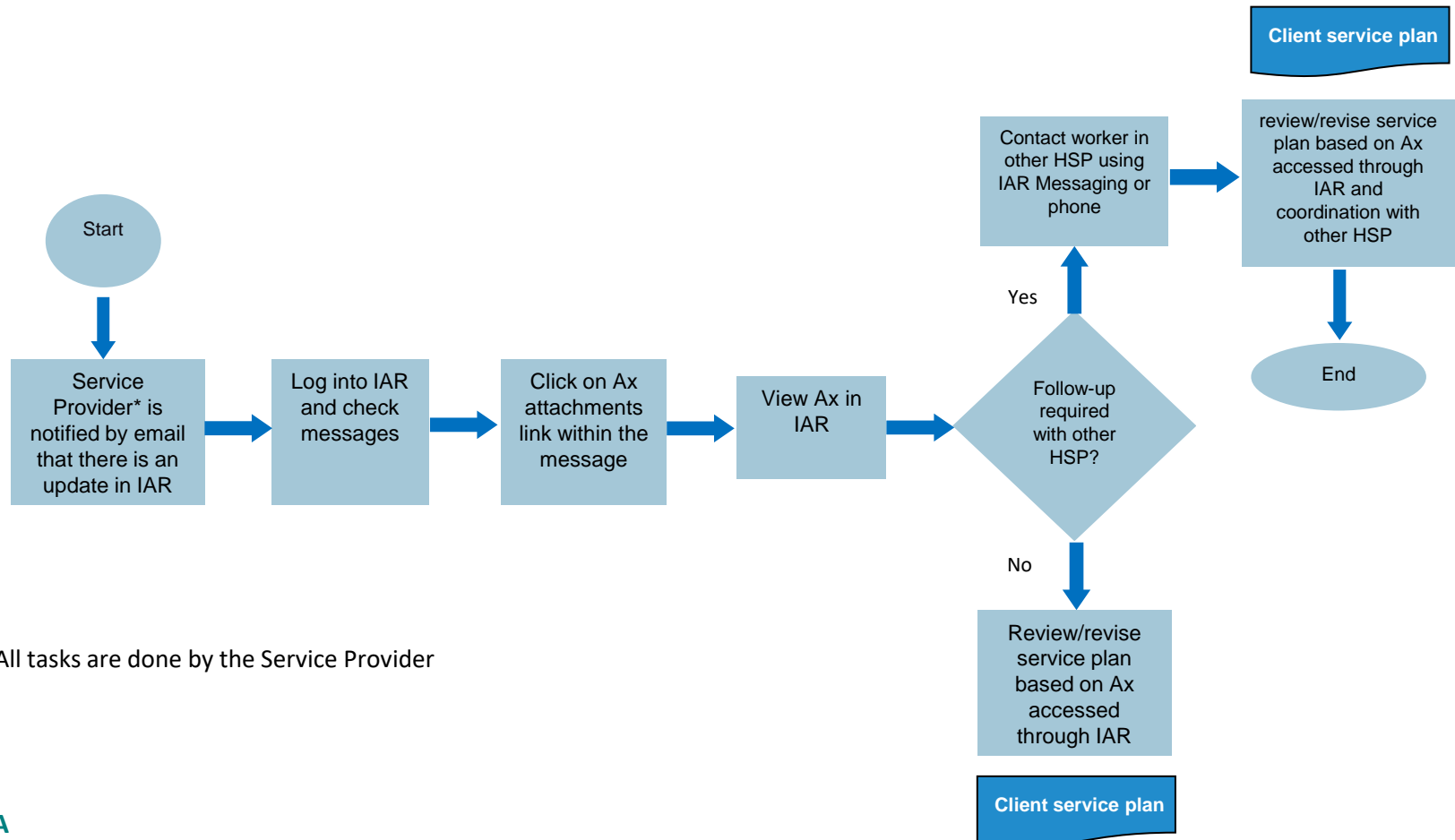


Business Process Chart: Using IAR for an existing client

Tasks	Who	Document
Notification of an update in IAR	Service Provider	Email
Log into IAR and check messages	Service Provider	
Click on Ax attachments link within the message	Service Provider	
View Ax in IAR	Service Provider	Client Ax in IAR
If required, contact other HSP using IAR messaging or phone	Service Provider	
Review/revise service plan based on Ax accessed through IAR and coordination with other HSP	Service Provider and client	Client service plan



Business Process Map: Using IAR for an existing Client



*All tasks are done by the Service Provider



Which format do you think you'll use to represent your "As Is" and "To Be" Business Process?

1. Business Process Mapping
2. Process Chart



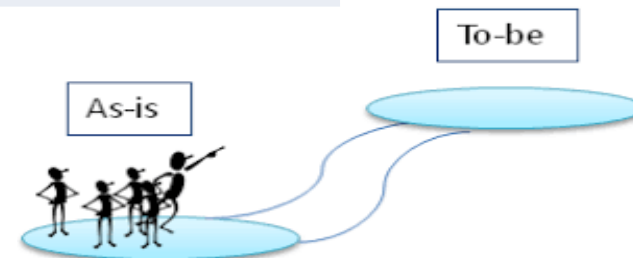
Develop your procedure/process for integrating IAR use into your workflow

Document your “As Is” and “To Be” process to incorporate the use of IAR

- Use the template provided to complete your “As Is” and “To Be” business process maps or charts
 - Involve a variety of members of your team
 - Consider: what are the steps, who does what, decision points
 - Finalize your “To Be” business process
 - Document and communicate process to relevant staff

Client Type	Starting Point	End Point
1. New Client	New client is referred	Service is initiated or client redirected
2. Existing Client	Receive email notification of update in IAR	Review/Revise service plan based on Ax viewed in IAR

***Do not expect perfection right away.
This is an evolving process!***



Reviewing your workflow

1. Interactive team building
2. Come up with innovative ideas
3. Opportunity to make changes that benefit staff and clients





Think about the roles in your organization.
Who would you include in this activity?



Why a session on developing a process/procedure for using IAR?

