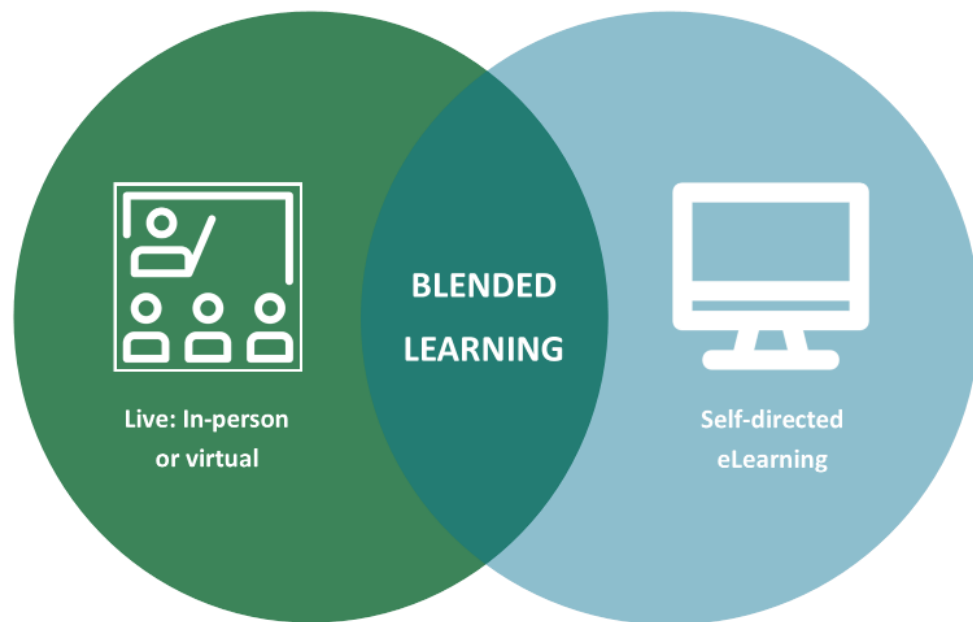


A blended approach to OCAN training for new and existing staff

March 21, 2022
1 – 2:30 PM

camh



This webinar will be recorded and will be posted on [eenet.ca](https://www.eenet.ca) after the presentation.

CAMH Land Acknowledgement

CAMH is situated on lands that have been occupied by First Nations for millennia; lands rich in civilizations with knowledge of medicine, architecture, technology, and extensive trade routes throughout the Americas. In 1860, the site of CAMH appeared in the Colonial Records Office of the British Crown as the council grounds of the Mississaugas of the New Credit, as they were known at the time.

Today, Toronto is covered by the Toronto Purchase, Treaty No. 13 of 1805 with the Mississaugas of the Credit.

Toronto is now home to a vast diversity of First Nations, Inuit and Métis who enrich this city.

CAMH is committed to reconciliation. We will honour the land through programs and places that reflect and respect its heritage. We will embrace the healing traditions of the Ancestors, and weave them into our caring practices. We will create new relationships and partnerships with First Nations, Inuit and Métis and share the land and protect it for future generations.



Reference: <https://www.camh.ca/en/driving-change/building-the-mental-health-facility-of-the-future>

Language

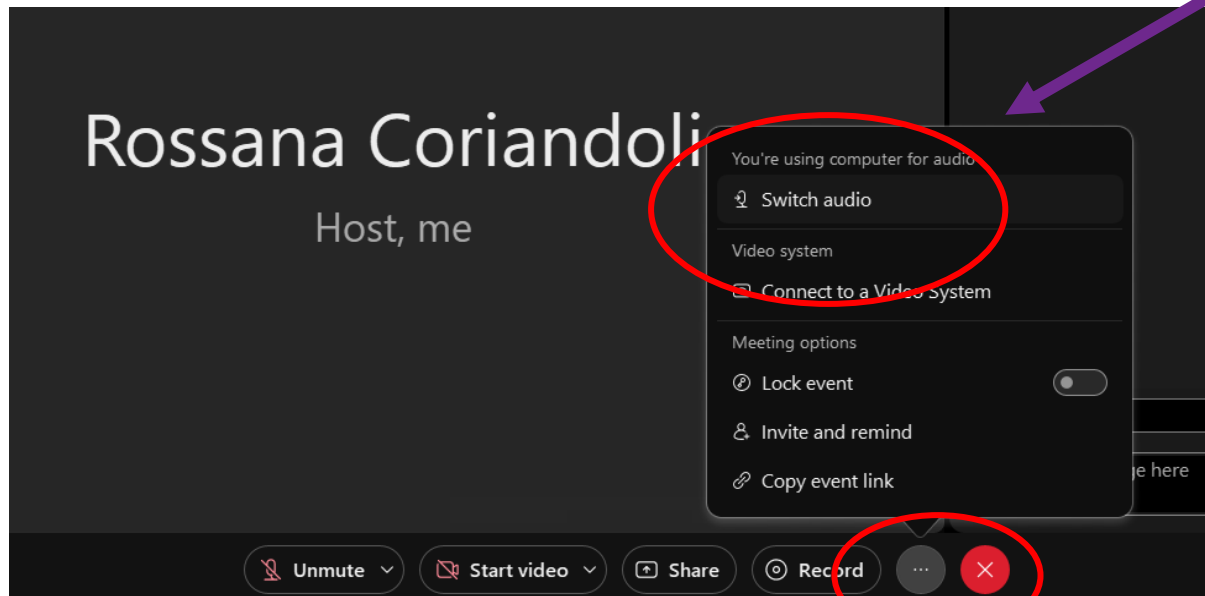
We are committed to placing diversity, equity and inclusion at the centre of our work. We recognize that the words we use to discuss health, identities and populations can have a powerful impact. We strive to use language that is respectful, inclusive and free of bias. Language is constantly evolving. As societal values change over time, so does the language that is considered acceptable. Nuances can be challenging to understand and navigate (CPHA, 2019). Please feel free to share with us any recommendations for more appropriate terms or words.

Housekeeping

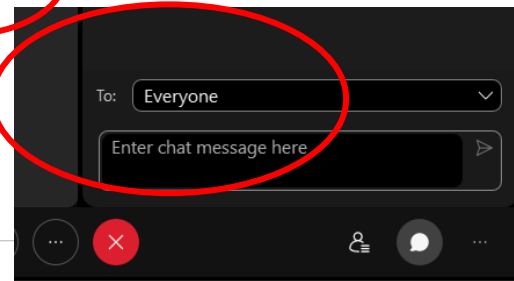
Switch audio



Enlarge the slides

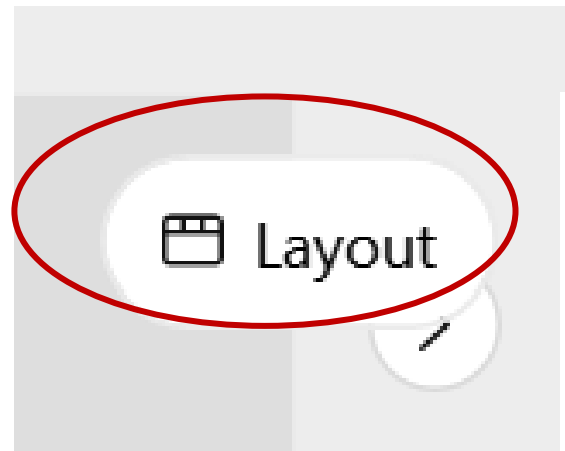


Share questions & comments with everyone



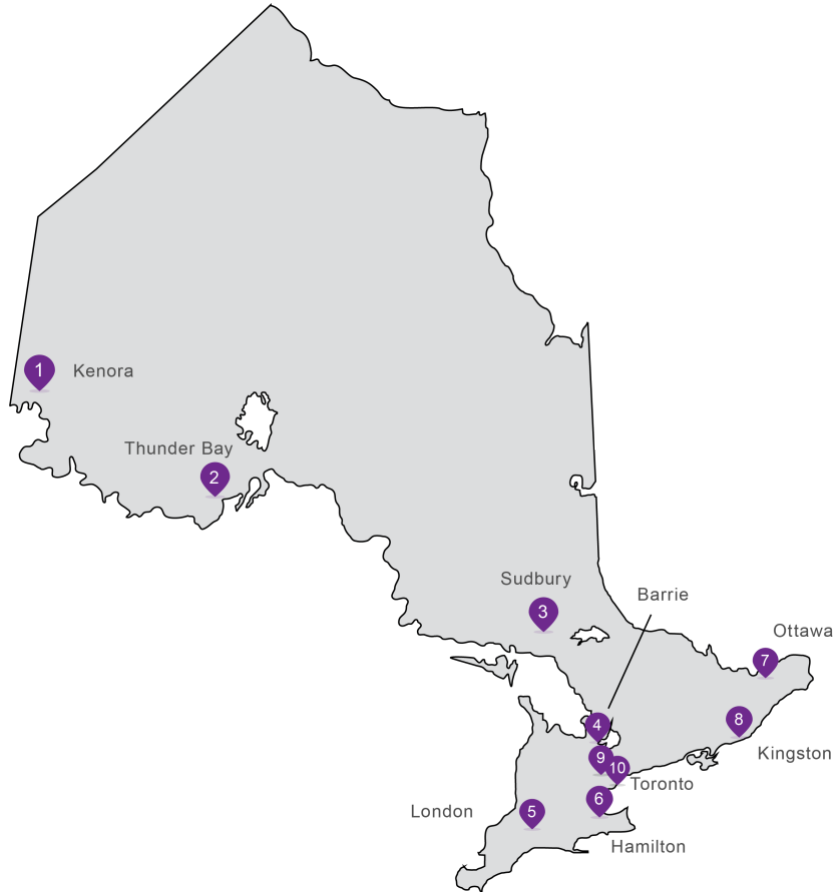
Housekeeping

- You can change the presenter layouts so you can see all panelist, or just the active speaker



- This webinar will be recorded and will be posted on the www.eenet.ca after the presentation. You will receive an email with the link.
- We would appreciate having your feedback on today's webinar. Your browser will switch to the survey after this webinar ends. **Thanks in advance for the 2 minutes of your time to complete our online feedback survey!**

CAMH Provincial System Support Program (PSSP)



PSSP at CAMH works with communities, service providers and other partners across Ontario to move evidence to action to create sustainable, system-level change.

- PSSP provides capacity and expertise in a number of areas, including implementation, knowledge exchange, evaluation and data management.
- Join our community collaborative space on <https://www.eenetconnect.ca/>



EN | FR

About Initiatives Communities Resources News Events



We connect people with evidence.

Evidence Exchange Network mobilizes knowledge to create a more collaborative and evidence-informed mental health, addictions, and substance use system.

[Visit us at eenet.ca](https://eenet.ca)

OCCAN Blended Training Approach

Jennifer Zosky, Clinical Assessment Specialist at Ontario Health

Supporting organizations' use of standardized assessments and the Integrated Assessment Record (IAR).

Jennifer.Zosky@ontariohealth.ca



**Ontario
Health**



Objectives and Overview

Objectives

- Understand the recommended blending training approach.
- Learn how to access the OCAN eLearning course offered by Ontario Health.
- Learn how OCAN trainers/mentors from 3 health service provider (HSP) organizations engage staff in activities that improve the quality and utility of OCAN.
- Have access to new training manuals and resource materials on practical activities your organization can review, select from and implement.

Background

Training approach during OCAN Implementation:

- Train the trainer approach was used
- Trainer within each HSP learned how to deliver training
- Trainers provided a 2-3 day training to staff



Challenge with Approach:

- Trainer and staff turnover
- Time consuming
- Hard to schedule
- Lack of consistency in the way OCAN is taught
- Difficult to update all trainers on changes to the training



OCAN e-Learning

2020 OCAN training through self-directed eLearning was introduced

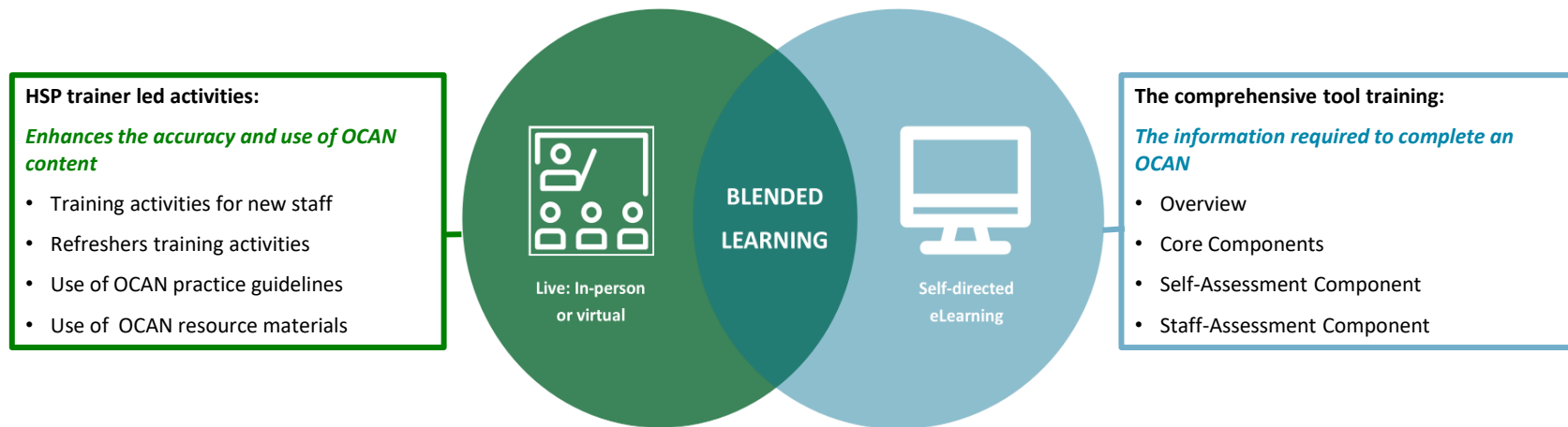


Can eLearning replace everything?

No!



Blended Training Approach





OCCAN eLearning Course

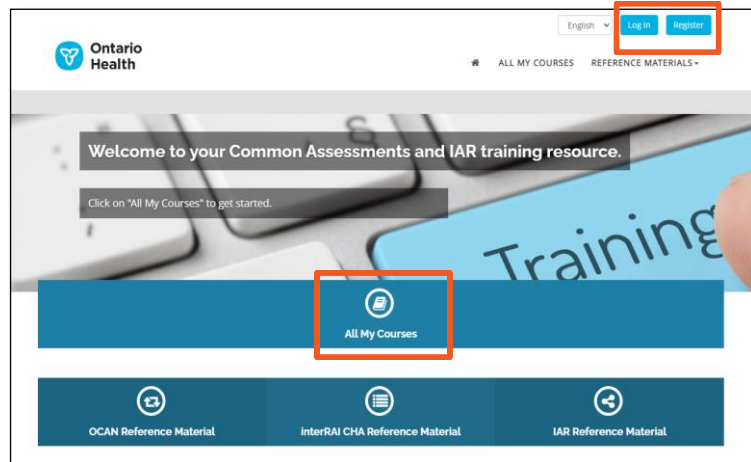
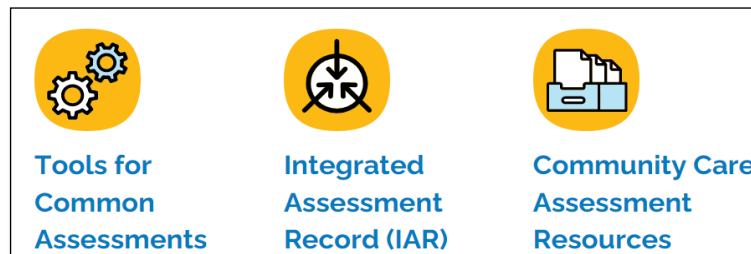
How do I access the eLearning?

Ontario Health Website:


[Community Care Resources & Support | Ontario Health](#)

Direct link to eLearning

[Home - Common Assessments and IAR \(thinkingcap.com\)](#)



Learning Paths

IAR Application Training		LEARNING PATH
<div><div>Integrated Assessment Record</div><div></div><div>Application Training</div></div>		<p>This series of videos is designed to present an overview of the Integrated Assessment Record, and provide HSP staff the opportunity to learn how to use the application functionality.</p> <p>Course Code: IAR App_550P_EN Status: Active</p> More Info
IAR Technical Training		LEARNING PATH
<p>This course is designed for those who will be involved in the process of submitting common assessment data to the Integrated Assessment Record (IAR).</p> <p>Status: Active</p>		More Info
OCAN Tool Training		LEARNING PATH
<p>Learn about the Ontario Common Assessment of Needs</p> <p>Status: Active</p>		More Info

OCAN Course Layout

Activity	Progress	Score	Duration	Estimated Time of Completion
1. Overview and Core OCAN Components	1 of the 3 required activities	--	00:11:14	--
Overview of OCAN	100% Completed	--	20m	Review Resources Details
Core OCAN and How to Use the OCAN Dictionary	50% Completed	--	20m	Resume Resources Details
OCAN Reasons and Timeline Rules	0% Completed	--	20m	Start AODA diagr... Details
2. OCAN Self-Assessment Component	0 of the 3 required activities	--	00:00:00	--
OCAN SE M1 Understanding the Self Assessment	0% Completed	--	20m	Start Core + Sel... Details
Experiencing the Self Assessment	0% Completed	--	20m	Start OCAN 3.0 S... Details
Introducing the Self Assessment	0% Completed	--	20m	Start Resources Details
3. OCAN Staff Assessment Component	0 of the 4 required activities	--	00:00:00	--
Introducing the Staff Assessment	0% Completed	--	20m	Start Resources Details
Understanding the Staff Assessment content	0% Completed	--	20m	Start Resources Details
Case Study One: Paula	0% Completed	--	30m	Start Resources Details
Case Study Two: Raj	0% Completed	--	30m	Start Resources Details
*optional				
4. OCAN Quiz	0 of the 1 required activities	--	00:00:00	--



Tips for Using eLearning

- OCAN Trainer/Mentors: Review the eLearning content
- Promote eLearning with management and direct service staff
- Set clear requirements:
 - Minimum: all new staff and existing staff must complete the eLearning course once
 - Recommendation: select components of the eLearning to complete every year as part of **refresher training**.
E.g. *introducing the self-assessment* and *the staff assessment content*
- Be available to respond to questions
- Contact Ontario Health IAR_Submissions@ontariohealth.ca to :
 - Get support if there are technical issues
 - Ask questions and provide feedback on the content
- Monitor staff use of eLearning (require staff to send screen shot of transcript and/or certificate of completion)



What are OCAN Trainers at other HSP Organizations Doing?

Training approach in the Niagara Region

Ian Masse, MSW, RSW

Manager, Longer Term Services

imasse@cmhaniagara.ca



Canadian Mental
Health Association
Niagara
Mental health for all

Niagara Trainers Network

Before the OCAN eLearning Course:

5 organizations developed the Niagara Trainers Network to deliver joint train the trainer sessions

- Consumer Survivor Initiative (CSI), Niagara Region Public Health, Gateway Residential Services, Oak Centre Club House, CMHA Niagara
- Collaborative Approach
- Held joint 2 day training each month:
 - Share experiences
 - Share costs
 - Consistent messaging

With the OCAN eLearning Course:

The Niagara Trainers Reviewed the eLearning and developed a blended training approach:

- Replace the power point slide format with eLearning
- Set a deadline for staff to complete eLearning on their own
- Hold a live 3 hour training session* after staff complete the eLearning

**Initially face-to-face and then adjusted as a result of Covid-19*

- Virtual half day session
- Ability to divide up into virtual break out rooms



Format of the Live Session

- **Have staff bring questions about what they were taught in the OCAN eLearning and bring them to session**
- **Topics covered**
 - What did staff like about the training
 - What didn't go well in the training
 - What do staff like about OCAN
 - What are areas of concern about using OCAN
 - Review how to enter OCAN into software using a Case study
 - Discussion on how to use OCAN information to support practice
- **Who delivers the live session and how often?**
 - Yearly Quarterly scheduled
 - Shared facilitators across training network.
- **Considerations for the trainers network in current context**
 - Understand the commonalities and the differences between network organizations
 - Keeping trainers has been challenging due to ongoing staff changes/turnover
 - COVID 19 guidelines have impacted this practice

Training approach in Kenora

Abdel Habaka, Clinical Service
Hub Team Lead
CMHA Kenora
ahabaka@cmhak.on.ca

CMHA Kenora

- Completing OCANs together: One-to-one support for new staff.
- Programming based on identified unmet needs.
- Rating Accommodation needs within a shelter.
- Rating needs for the long-term.
- Case conference with shared programs.
- Addressing clients needs with community partners.

Training approach in Peel Dufferin

Diana Sousa, Program Manager
Bramalea Care Collaborative
CMHA Peel Dufferin
SousaD@cmhapeel.ca

Learning Labs:

- New and existing staff are invited to participate.
- Ontario Health eLearning training and Organizational database input is reviewed.
- Peer mentor:
 - Shadowing of clients completing OCANs.
 - Ongoing support and mentorship.

**New Initiative:*

- *Integrating OCAN language into progress notes*





How to Implement a Blended Approach: Manuals for OCAN Trainers and Other Stakeholders

Purpose of the Manuals



What's In the Manuals?

1



OCAN Training Activities for New Staff

Ontario Common Assessment of Need
(OCAN)

2



OCAN Refresher Training Activities

Ontario Common Assessment of Need
(OCAN)

3



Guidelines for Using OCAN Content in Practice

Ontario Common Assessment of Need
(OCAN)

Input: Improving the quality of OCANs
in your organization

Output: Improving the use of OCAN
information in your organization

Brand New Resources!



Send feedback:

Jennifer.Zosky@ontariohealth.ca

How do I use them?

- Straightforward, step by step guidance.
- Information is all in one place with links to OCAN and other relevant reference materials.
- Don't do it all!
- Review the intent of each activity and decide what to use.
- Involve others.
- Start small and get feedback.



1. OCAN Training Activities for New Staff

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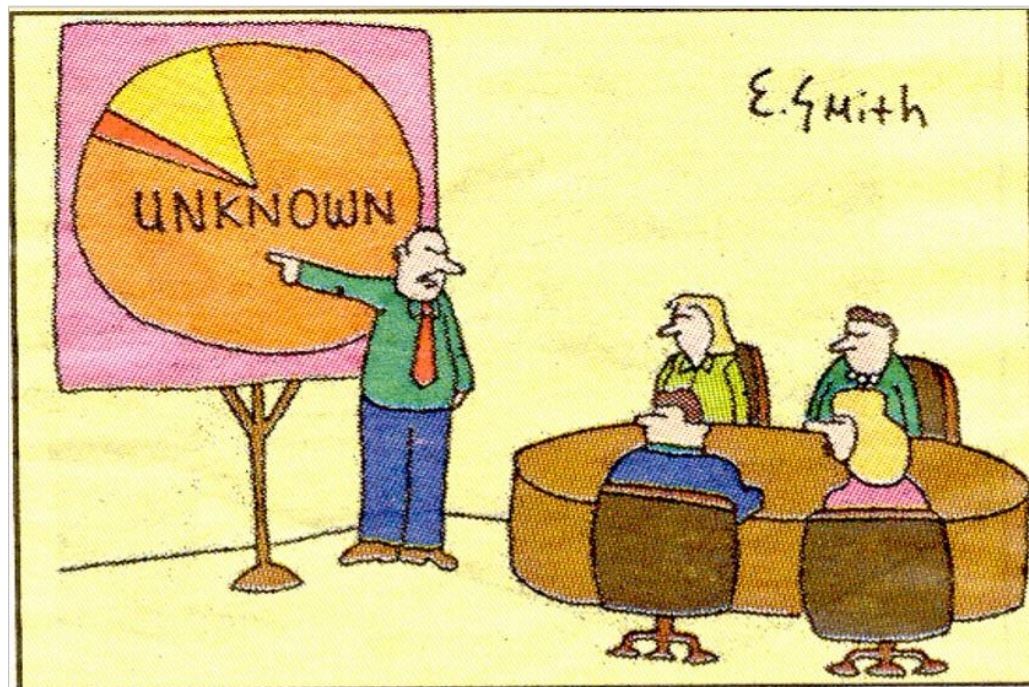
Introduction	3
<u>OCAN Training Activities:</u>	
1. One-to-One Review of Staff's OCANs	4
2. Correcting Data Quality Issues	7
• Improving OCAN Data Quality Resource	8
3. Facilitated Group Discussion for New Staff	14
• Camberwell Assessment of Need (CAN) Q&A Training Resource	16
4. Need Rating Buzz Activity	18
• Buzz Activity Handout	19
• Buzz Activity Answer Key	20

2. Correcting OCAN Data Quality Issues* *Highly recommended to do this activity with new and existing staff*

Intent	<p>Some analysis done on provincial OCAN data has determined that the quality of the data is good overall. However, quality issues were identified for some fields in the OCAN. The intent of this activity is to address quality issues by training staff on how to enter information accurately in those fields. The goals are to:</p> <ul style="list-style-type: none"> • Improve the quality of OCAN information • Increase the amount of data entered in fields with significant percentages of missing/unknown data.
Duration	<ul style="list-style-type: none"> • ~1 hour
Format	<ul style="list-style-type: none"> • Face to face or virtual meeting. • 1 – 20 people
Reference Materials	<ul style="list-style-type: none"> • Improving OCAN Data Quality Resource (pg. 8) • OCAN Dictionary (separate large document – use “Ctrl F” to look up field definitions) • OCAN Form • Need Rating Reference • Domains Definitions and Examples • Data Fields and Values
Instructions to Prepare for the Activity	<ul style="list-style-type: none"> • Send meeting invite to staff and include the intent of the activity • Carefully review the Improving OCAN Data Quality Resource (pg. 8) • Become familiar with the reference materials so you can describe them to staff • Ensure the staff group has access to the reference materials
Instructions for Facilitating the Activity	<ul style="list-style-type: none"> • Describe the intent and goals of the activity • Show the reference materials one by one, briefly describe them and encourage staff to use them • Walk through the Improving OCAN Data Quality Resource (pg.8) with staff • As you walk through each item, pause, and ask staff to contribute their questions, comments and ideas so the exercise includes discussion. E.g. <i>Are you surprised that this field in OCAN is often getting missed? Why do you think that is? What are the challenges? What are your ideas for increasing responses?</i>



Correcting Data Quality Issues



“If we take out the ‘unknown’, our study shows it will be a good financial year”

2. OCAN Refresher Training Activities

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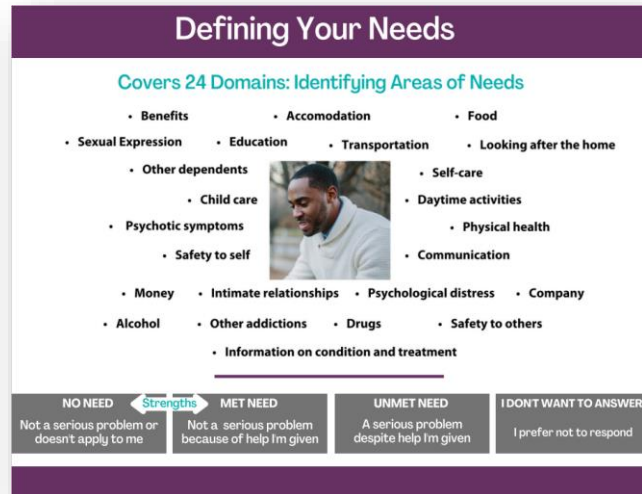
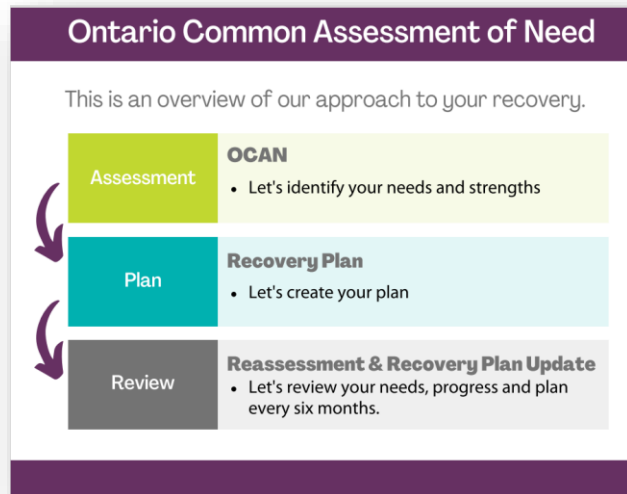
Introduction	3
Refresher Training Activities:	
1. Correcting Data Quality Issues	4
• Improving OCAN Data Quality Resource	5
2. Facilitated Group Discussions on OCAN Content	11
• Camberwell Assessment of Need (CAN) Q&A Training Resource	13
3. Need Rating Buzz Activity	15
• Buzz Activity Handout	16
• Buzz Activity Answer Key	17
4. Improving Client Self-Assessment Completion	18
• OCAN Postcard Resource	21
• OCAN Postcard Script	22
5. OCAN Jeopardy Game	24

4. Improving Self-Assessment Completion

Intent	<p>The OCAN supports a recovery approach to service delivery with the inclusion of a self-assessment. Where possible, the client is also involved in the overall OCAN process including prioritizing actions that are most important to them. The goals of this activity are to:</p> <ul style="list-style-type: none"> • Develop a consistent approach to introducing OCAN and the Self-Assessment to clients in your organization • Improve client completion of the Self-Assessment • Improve client's understanding of the purpose of completing OCANs
Duration	<ul style="list-style-type: none"> • 1 – 2 hours
Format	<ul style="list-style-type: none"> • Face to face or virtual meeting. • 3 - 20 people
Reference Materials	<ul style="list-style-type: none"> • OCAN Self-Assessment Form • eLearning Module: <i>Introducing the Self-Assessment</i> (the 3rd module in the <i>OCAN Self-Assessment Component</i> section) Home - Common Assessments and IAR (thinkingcap.com) • <i>OCAN Postcard and Script</i> (pg. 21&22) developed by the <i>OCAN Quality Improvement (QI) Network</i>, a group of organizations doing collective QI work supported by the <i>Excellence through QI Project (E-QIP) - Excellence through Quality Improvement Project</i> <ul style="list-style-type: none"> ➢ The Postcard and script are used with clients to describe the OCAN process and how to complete the OCAN self-assessment
Instructions to Prepare for the Activity	<ul style="list-style-type: none"> • Log onto the OCAN eLearning Course, go to the <i>OCAN Self-Assessment Component</i> and review the 3rd module - <i>Introducing the Self-Assessment</i> <ul style="list-style-type: none"> ➢ Although staff have done this as part of completing the eLearning course, this module can be re-used in refresher training. The plan is to do this module together as a staff group. Prepare to facilitate the <i>Planning Exercise</i> in the module as a group. <i>*In addition to the questions asked in the Planning Exercise, you can create your own questions with the purpose of developing a consistent approach in your organization</i>
Instructions for Facilitating the Activity	<p>Describe the intent and goals of the activity</p> <ul style="list-style-type: none"> • As a group, do the <i>OCAN eLearning, Introducing the Self-Assessment module</i>. You can mention that they did this module on their own before. <ul style="list-style-type: none"> ➢ As a group, complete the <i>Planning Exercise</i> from the module ➢ <i>Assign someone to take notes - IMPORTANT: The planning exercise in the eLearning environment allows you to take notes, but it does not save them. Therefore, note responses to the planning exercise questions outside of the eLearning platform where they can be saved and seen by participants (e.g. flipchart, electronic word document).</i> • If you decide to use the <i>Postcard and Script</i>, this can be the basis for the consistent approach you implement. For the activity, you can use either of the following 2 approaches:



Improving Client Self-Assessment Completion



Developed by the OCAN QI Network supported by the Excellence through QI Project (E-QIP)
[E-QIP – Excellence through Quality Improvement Project](#)

Let's Play a Game!

OCAN JEOPARDY!			
OCAN Overview	Name the Domain	Consumer Self Assessment	Staff Assessment
\$100	\$100	\$100	\$100
\$200	\$200	\$200	\$200
\$300	\$300	\$300	\$300
\$400	\$400	\$400	\$400
\$500	\$500	\$500	\$500

3. Guidelines for Using OCAN Content

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2. Goal Planning with Clients	6
3. Use of OCAN content in Day-to-Day Practice with Clients	7
4. Using OCAN Reassessments with Clients	8
*Need Over Time Report	9
Using OCAN content in Client Review Meetings	10
Using OCAN Content to Improve Services	11
*Sample Needs Analysis Reports	12

Recommended Process for Using the Guidelines

This section describes step by step recommended actions to take for using the guidelines in this manual. Consider using Quality Improvement (QI) methodology along with these guidelines. For example, test out using a practice guideline as a change idea for addressing a problem or opportunity identified using QI tools. For more information click: [E-QIP – Excellence through Quality Improvement Project](#)

1. Review all the Practice Guidelines

Determine stakeholders to participate in the review (e.g. trainer, managers, QI committee)

2. Identify which practice guidelines staff are already doing

- As part of your strategy, include a way to communicate to staff and stakeholders the effective practices your organization is already doing.
- Determine if additional steps are required to formalize this practice guideline:
 - Gather more detail from staff on the approach they use with clients
 - Document and develop resources: e.g. practice guideline handout, power point slides, infographics.

3. Identify which practice guidelines to implement in your organization

- Conduct consultations to gather staff feedback and details to include in the practice guidelines.
- Document and develop resources: e.g. practice guideline handout, power point slides, infographics.

4. Conduct a small-scale implementation and evaluate the practice guidelines

- Test the new practice guideline with a small group of staff
 - Train staff on practice guidelines using resources you developed
 - Have staff implement the practice guidelines for a set period of time, e.g. 3 months
 - Gather feedback from staff and clients through surveys, interviews or focus groups
 - Revise the practice guidelines based on feedback

5. Roll out the finalized practice guidelines

- Develop your roll out approach (e.g. which teams will implement, develop a plan including timelines)
- Ensure there is support for staff as they implement the guidelines
- Continue a process evaluation and make adjustments as needed

O CAN Related Research Findings



What this means for your services

Meeting **client identified** unmet needs* improves outcomes in:

Well-being

Therapeutic alliance

Satisfaction with services

Converting **unmet needs to **met need** or **no need** leads to positive client outcomes*



Day-to-day work should focus on addressing unmet needs that clients have identified as priorities

Staff training and program planning should focus addressing high unmet need domains

Increasing agreement over time between clients and staff improves outcomes



Engage in conversations that share staff and client perspectives about needs

The process of regular client reviews improves outcomes

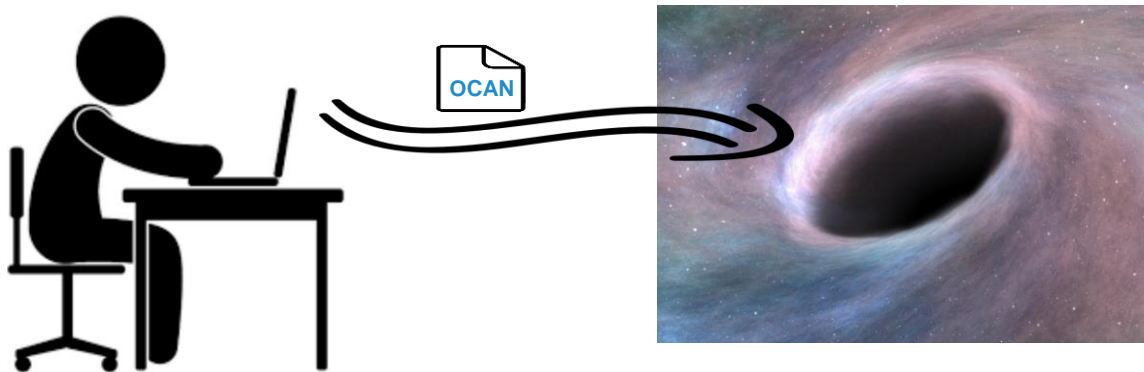


Use reassessments to take a step back from day-to-day work with your client and do an overall review of changes in need: progress, challenges and next steps



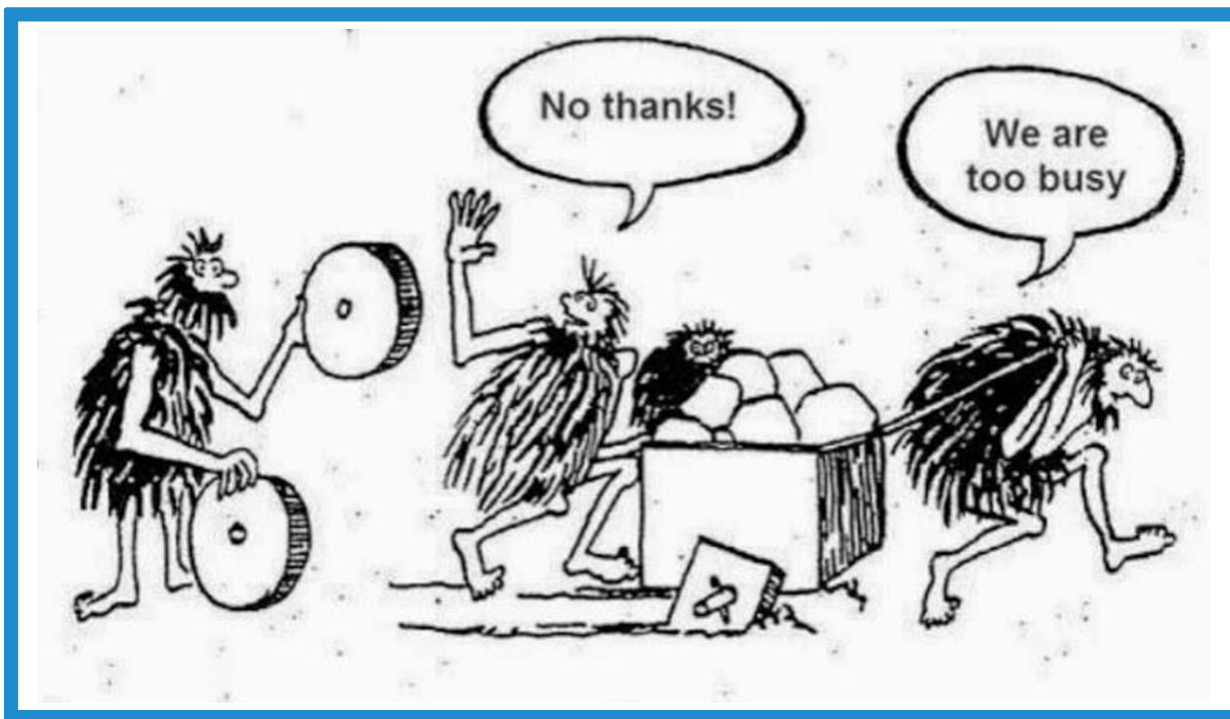
Challenges/Myths*

- OCAN is for data collection only and has no clinical value
- OCAN takes clinicians away from direct service
- No one ever looks at the OCAN – it goes into a black hole



If this is how you feel, something has to change

There's a better way



Practice Guideline Structure

One
Page



Ontario
Health

2. Goal Planning with Clients

Research Findings

- Reducing client rated unmet needs improves outcomes in quality of life (Killaspy et al (2008) *Mental health needs of clients, Journal of Mental Health, 17, 207-218*). (Slade et al (2005) *Patient-rated mental health needs and quality of life improvement, British Journal of Psychiatry, 187, 256-261*.)
- The clinical goal is converting unmet needs to met needs or no needs (Drukker et al (2008) *The use of the CAN..., Social Psychiatry and Psychiatric Epidemiology, 43, 410-417*).
- Hope, Identity, meaning and strengths were important in people's recovery (Andresen et al (2003) *The experience of recovery from schizophrenia, Aust & New Zealand J Psychiatry, 37, 586-94*)

Why use the following Practice Guideline?

- Focusing goal planning on what the client identifies as their most pressing unmet needs should drive services
- Service planning should be informed by what's meaningful to a person's recovery: their hopes, goals, strengths, spirituality, and culture

Practice Guideline

- For each domain in OCAN, there is the option to include an Action.
- Focus actions on domains rated as an unmet need by your client.
- If the client self-assessment is not completed, focus actions on domains that your client has identified as important to address during the assessment conversation.
- The following recovery-focused questions are in both the client self-assessment and the staff assessment:
 - *What are your strengths and skills? What are your hopes and goals for the future? What do you need to accomplish your goals? Is spirituality/religion an important part of your life? Please explain. Is culture (heritage) an important part of your life? Please explain.*
- In the OCAN conversation, ask your client to elaborate on their responses in the self-assessment. If the self-assessment was not completed, facilitate a discussion using these questions as a guide. Document additional information in the staff assessment component.
- Facilitate the discussion with your client about goals/actions using the following information:
 - Domains rated as unmet needs
 - Domains rated as Met and/or No Needs if the clients have important aspirations. E.G. Daytime activities – they are doing volunteer work, but have a goal of part-time paid employment
 - Responses to recovery-focused questions. E.g. skills and strengths – ways the client can apply their strengths and skills to actions
- At the end of the OCAN, all actions documented will be automatically listed in the Summary of Actions Chart
- In the chart there is column called "priority"
 - Review the Summary of Actions with your client
 - Have your client determine the priority and enter it manually into the column.

*Recommendation:

- Use the Summary of Actions to inform a more detailed Service Plan
 - Breakdown the Summary of Actions into short-term specific tasks

Final Tips for using Training and Practice Guideline Manuals

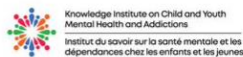
- Get feedback from stakeholders (management, direct service staff, clients...) to determine which activities and guidelines to use.
- Select activities and guidelines that align with your organization's strategic and quality improvement plans.
- Embed activities and guidelines into your workflow: e.g. team meetings, supervision, client meetings
- Start small and evaluate





More OCAN News

Register for Virtual Conference!



Register today and stay updated by visiting the [website](#)

QUESTIONS?



THANK YOU TO OUR PRESENTERS!

We encourage you to follow-up with Jennifer:

Jennifer.Zosky@ontariohealth.ca