

# Module 4 – End User Training

Intro to Documentation within Alayacare

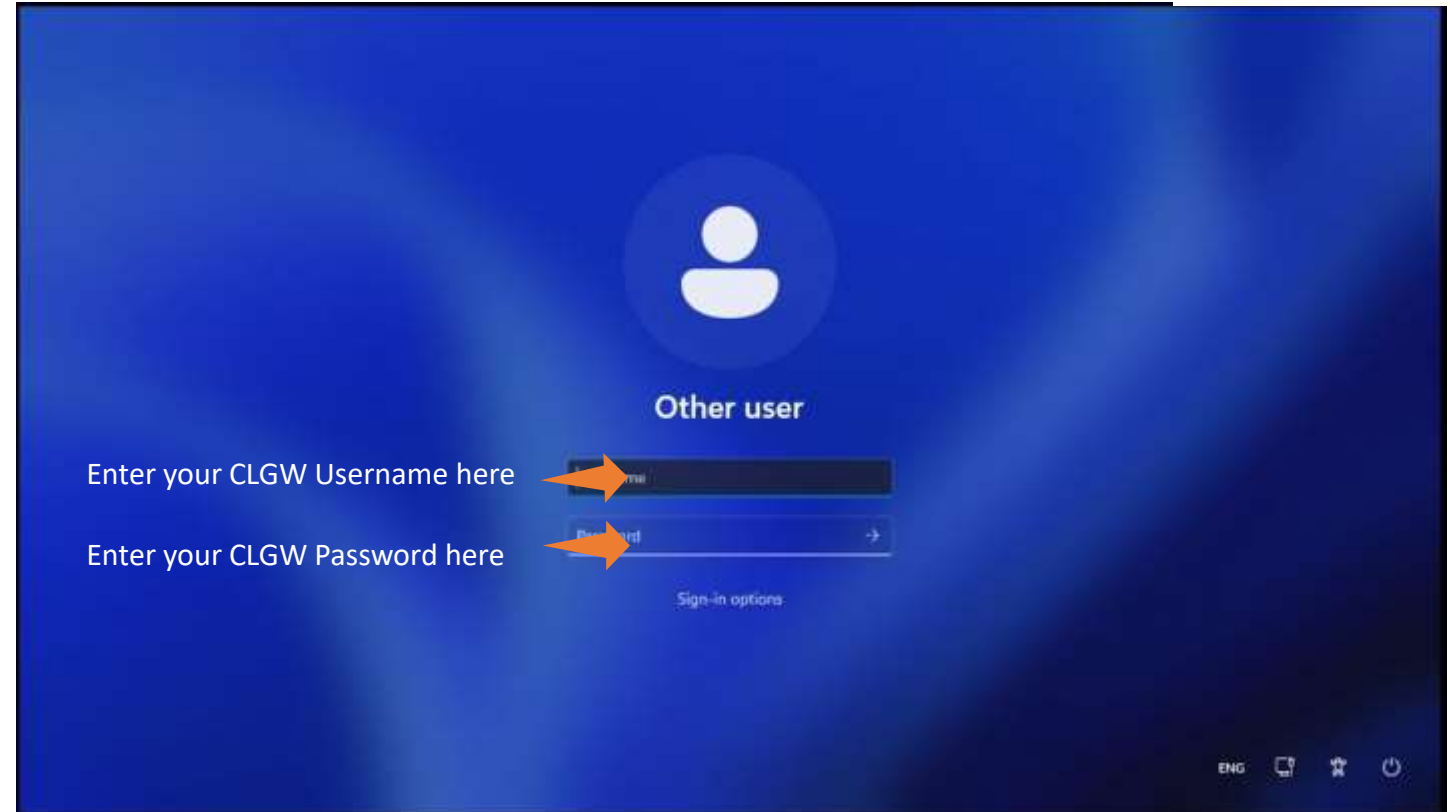
# Things you will need before getting started:

- A Lab Laptop or your assigned work laptop
- Access to your CLGW Account
- Your Microsoft Authenticator App (MFA) or able to receive a code from your cellphone

**If you are missing one of the items above or need assistance, please raise your hand and we will come over to assist you. Thank you :)**

# Signing into the Lab Laptop

1. Open the Laptop and press the power button
2. Click on "Other User"
3. Enter your CLGW Username  
(Example: JohnSmith) and your CLGW password
4. Press the Enter button to sign in



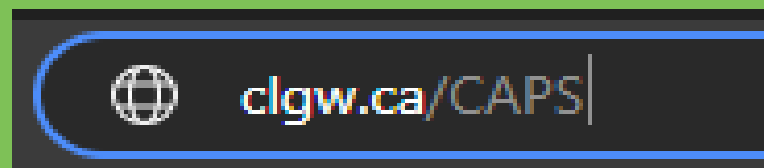
**If you encounter any error messages or need assistance, please raise your hand and we will come over to assist you. Thank you :)**

# Opening Alayacare (CAPS)

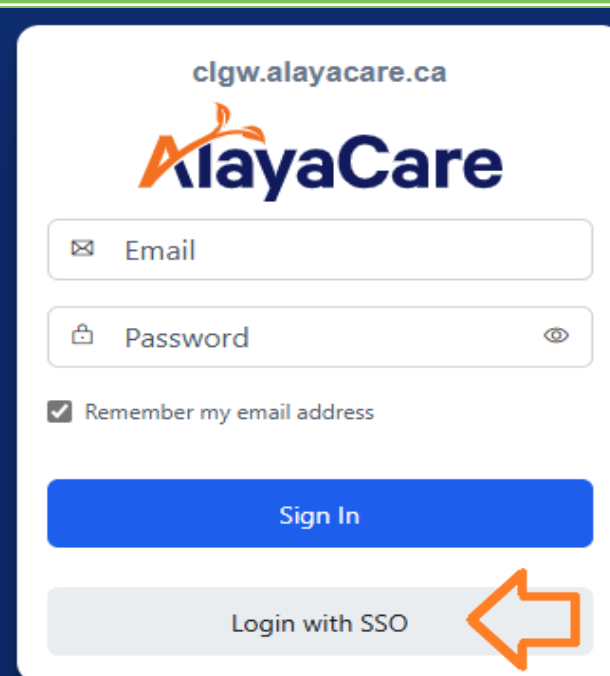
Open Microsoft Edge



In the Address bar, go to:  
**clgw.ca/CAPS**



Click on Sign in with SSO  
Sign in with your CLGW Account



# Let's Review – Privacy and Security

- PHIPA, or the Personal Health Information Protection Act, is Ontario's health-specific privacy legislation that came into force on November 1, 2004. It governs how personal health information may be collected, used, and disclosed within the health sector, Ensuring that individuals' health information is protected.
- PHIPA establishes rules for health information custodians, which include healthcare practitioners and facilities, and grants individuals rights regarding their personal health information.
- CAPS is only to be accessed on agency devices. Any personal devices can connect to CLGW Wi-Fi on CLGW-GUEST network. CLGW-AIR and others are for CLGW devices only

# E425 - Documentation Standards

1. **Accuracy** – All documentation must reflect factual and objective information. Avoid personal opinions, assumptions or subjective interpretations.
2. **Clarity** – Full sentences, clear, concise and professional language are to be used.
3. **Timeliness** – Documentation of interactions is to be completed as soon as possible after the interaction or by the end of each shift, ensuring details are not forgotten or misrepresented. Similarly, for incidents, documentation of an event and risk mitigation actions undertaken is to be completed as soon as possible after the event or by the end of the shift to ensure details are accurately documented.
4. **Privacy and Confidentiality** – Adherence to relevant organization policies, including privacy, to ensure all records are kept confidential. Use of initials (not full names) are to be used for other individuals in a service note record.
5. **Consistency** – Standardized templates, formats, and language (per organizational guidelines) are to be used (see Person-Centered Language below)

# Let's Review – Service Note Expectations



- Always document using language that is respectful, person-centered, and free from personal opinions or assumptions.
- Service Notes are a legal document and should be completed with a professional tone.
- Focus on observable facts and the person's experiences.
- Language should always affirm the value, dignity, and individuality of the person.
- Avoid terms that could be perceived as labeling, demeaning, or minimizing.

# Module 4: Learning Objectives



1. How to: Create a Service Note
2. How to: Create a Consult Note and attach a form to PWS
3. How to: Update Changes to the PWS (Demographics) using a new form



# Let's add a Service Note – All Steps

1

Step 1 - Open Alayacare with SSO and navigate to correct PWS and click their name

2

Step 2 - Click **Care Delivery** and then **Progress Notes** in the left column

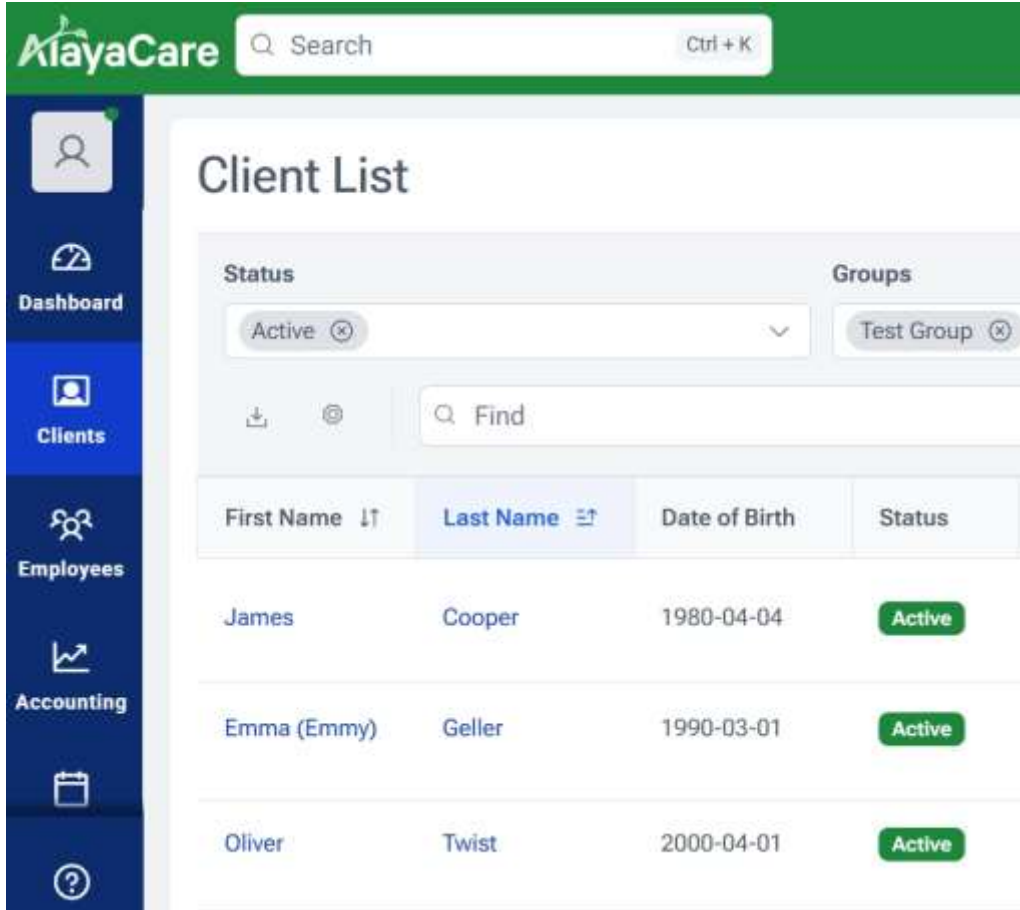
3

Step 3 - Write your Service Note and hit **Publish** when note is finished

4

Step 4 – Your Note is Published and available to view in Alayacare(CAPS)

# Let's add a Service Note - Step 1



AlayaCare Search Ctrl + K

## Client List

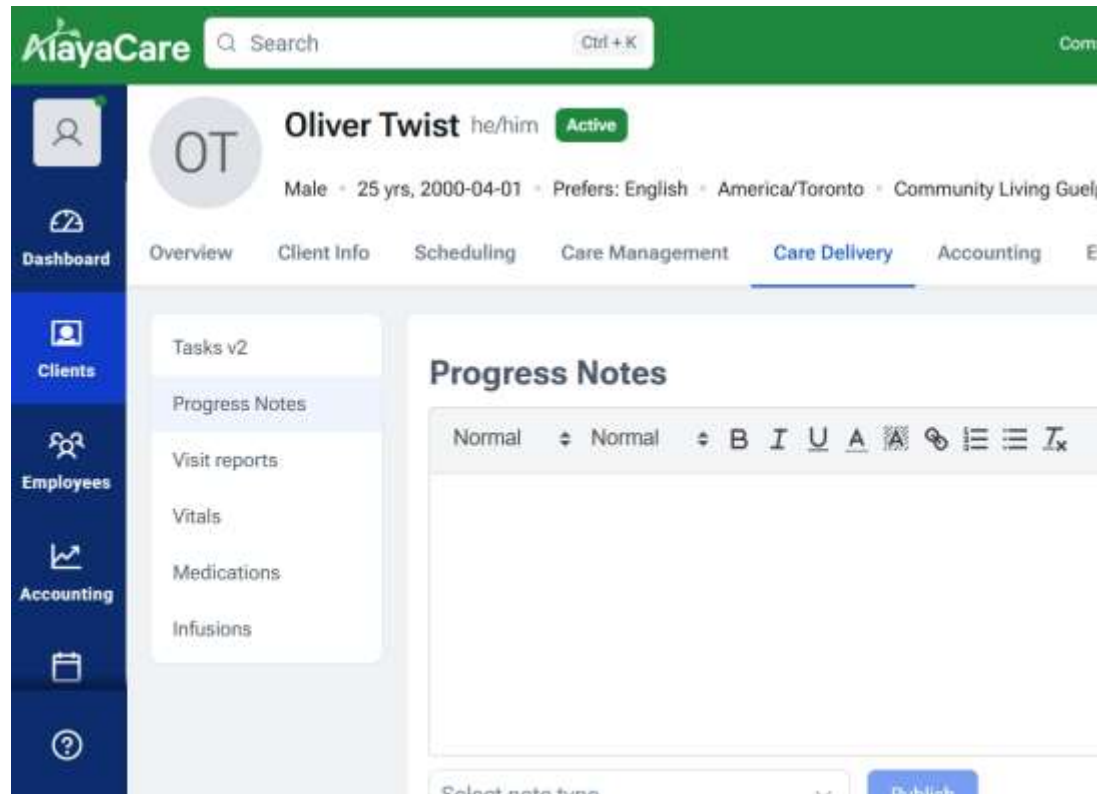
Status: Active Groups: Test Group

Find

First Name	Last Name	Date of Birth	Status
James	Cooper	1980-04-04	Active
Emma (Emmy)	Geller	1990-03-01	Active
Oliver	Twist	2000-04-01	Active

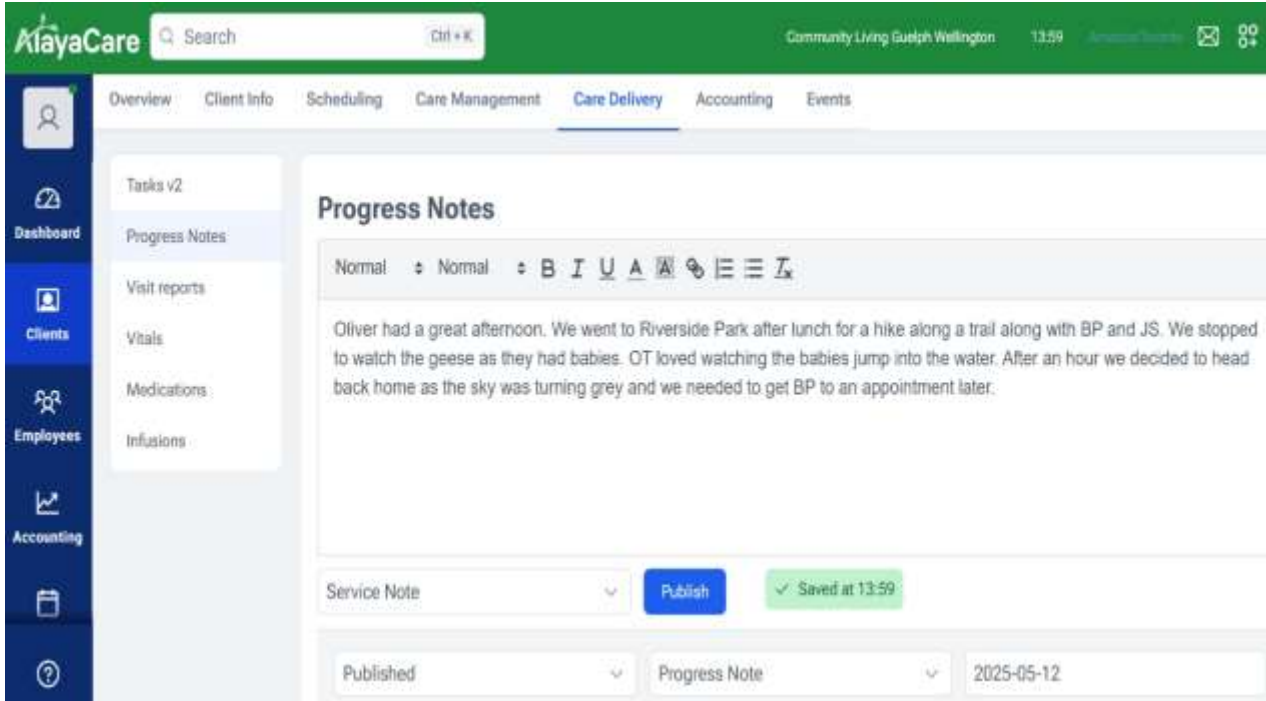
- To begin, open Alayacare using your SSO (Single Sign on)
- Next, click CLIENTS (PWS)
- You will see a list of PWS that you are supporting
- Choose the PWS you'd like to write a Service Note for by clicking their name

# Let's add a Service Note – Step 2



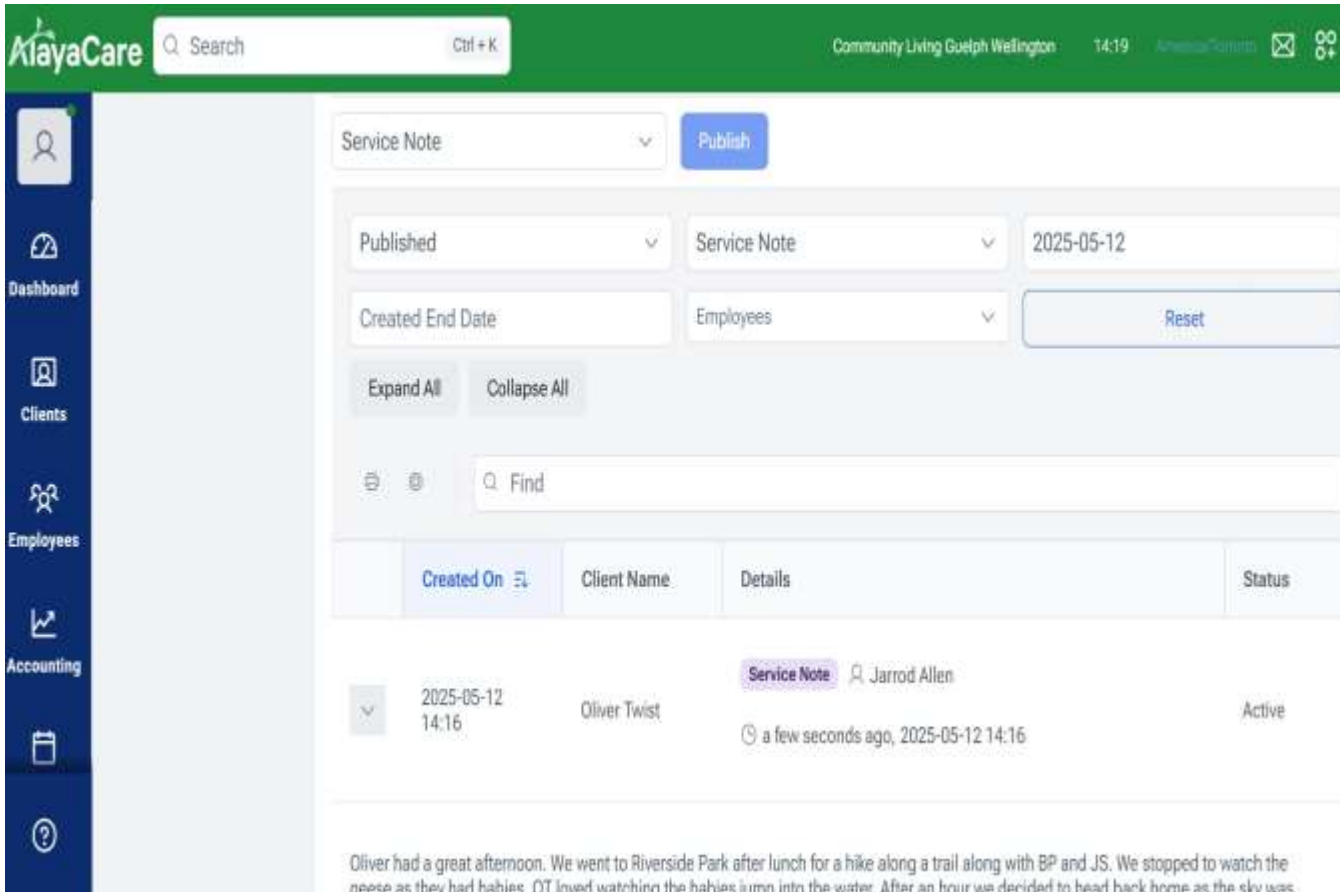
- Click on **Care Delivery** along the top
- Then click **Progress Notes** from the left sidebar as shown
- Write your **Service Note** in the textbox

# Let's add a Service Note – Step 3



- Your draft is automatically saved with a timestamp of the latest save
- Make sure to **Select Service Note** from the dropdown menu
- After you are finished the **Service Note**, click **Publish**

# Let's add a Service Note – Step 4



The screenshot shows the MyaCare web application interface. The top navigation bar is green with the MyaCare logo, a search bar, and user information. The left sidebar contains navigation links for Dashboard, Clients, Employees, and Accounting. The main content area displays the 'Service Note' form. The form includes a 'Service Note' dropdown menu, a 'Publish' button, and a 'Published' dropdown menu. Below these are fields for 'Service Note', 'Created End Date', and 'Employees', along with a 'Reset' button. A table below the form shows a list of service notes with columns for 'Created On', 'Client Name', 'Details', and 'Status'. The first entry shows a service note for 'Oliver Twist' created on '2025-05-12 14:16' by 'Jarrod Allen', with a status of 'Active'. The details of the service note are visible at the bottom of the screen.

MyaCare Search Ctrl + K Community Living Guelph Wellington 14:19 Arlene Tomlin

Service Note Publish

Published Service Note 2025-05-12

Created End Date Employees Reset

Expand All Collapse All

Find

Created On	Client Name	Details	Status
2025-05-12 14:16	Oliver Twist	Service Note Jarrod Allen	Active

Oliver had a great afternoon. We went to Riverside Park after lunch for a hike along a trail along with BP and JS. We stopped to watch the geese as they had babies. OT loved watching the babies jump into the water. After an hour we decided to head back home as the sky was

- To view your published Service Note ensure that **Published** and **Service Note** are selected as shown

System will show:

- Who wrote the Service Note
- Time it was published
- PWS note was for

# Service Note Best Practices



- Continue to document your Service Notes with the same strategies as you do now
- Enter your shift time at the top of the Service Note (i.e. 7am-3pm)
- Service Notes are to now be captured digitally, then entered in Alayacare(CAPS) the same day as your shift
- If you cannot finish and publish your note the same day, on your next shift publish the note with LATE ENTRY at the top
- Ensure you are finished with the Service Note before hitting Publish, you cannot edit a published Service Note.
- An idea might be to open a shared document on the desktop, copy the notes there first, then cut and paste the notes that pertain to that PWS in Alayacare(CAPS)



# Example of Cut and Paste Service Notes

## SERVICE NOTE - BACKUP FORM

**Reminder:** This form is not a substitute for adding Service Notes into CAPS. Please add these notes into CAPS as soon as possible.

**Your Name:** Mary Poppins

**Today's Date:** June 11<sup>th</sup> 2025

**Your Shift:** 7am – 3pm

**PWS:** Oliver Twist

### SERVICE NOTES:

Oliver had a great day today! We went to the grocery store and picked up some lasagna making materials. We helped with showering and a shave around noon. I think his new medication might be making him tired, will need to follow up with Dr Jones. We helped the grate the cheese but Oliver did the rest himself and it turned out delicious! EG was coming by often saying that the house smelled like a restaurant. All in all a great day and Oliver is already watching videos on his tablet trying to find a new dish to make next.

Emma and I spent the day drawing and listening to her favourite music in her room. OT came by to offer some lasagna which he was very proud of and it tasted amazing. Emma told OT that it was the best lasagna she has ever had. OT was just beaming. Afterwards we went to the park and watched the baby geese by the water and then went home for afternoon snacks.

OT

**Oliver Twist** Active

Other · 45 yrs, 1980-01-30 · 519-444-6678 · America/Toronto · Community Living Guelph Wellington · ACT

Overview · Client Info · Scheduling · Care Management · **Care Delivery** · Accounting · Events

Progress Notes

Visit reports

Vitals

Medications

### Progress Notes

Normal · Normal · B I U A [icon] [icon] [icon] [icon]

Oliver had a great day today! We went to the grocery store and picked up some lasagna making materials. We helped with showering and a shave around noon. I think his new medication might be making him tired, will need to follow up with Dr Jones. We helped the grate the cheese but Oliver did the rest himself and it turned out delicious! EG was coming by often saying that the house smelled like a restaurant. All in all a great day and Oliver is already watching videos on his tablet trying to find a new dish to make next.

Service Note · Publish · ✓ Saved at 10:19

# ACTIVITY 1 – Add a Service Note to Oliver

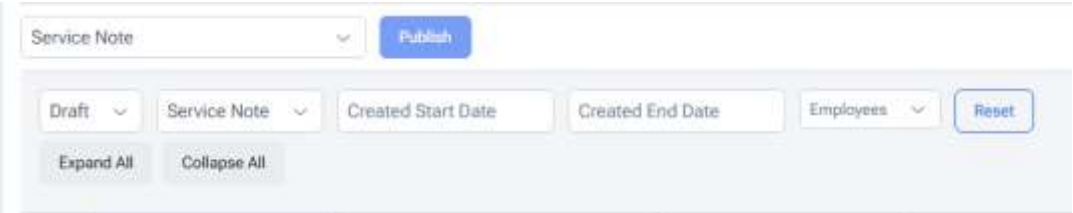
**Objective:** Write a Service Note for Oliver Twist as the 7am-3pm person.

**Scenario:** *Oliver lives in a group home with 3 other people supported. Oliver needs help with personal hygiene routines. Oliver has asked last week about learning how to cook spaghetti, his favourite meal. He enjoys watching cooking shows on YouTube. Oliver often is up late watching videos in his room, sometimes keeping up his house mates. Oliver wants to go the grocery store to buy ingredients to make a lasagna in the afternoon.*



# Using filters - Drafts

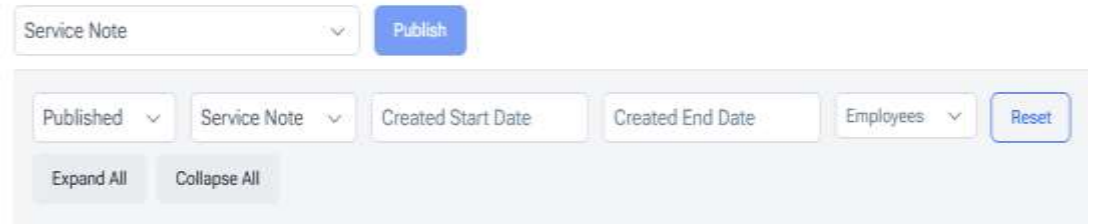
- Use the filters to quickly find what you need to
- If you are searching for a **Draft** of a note you are working on or need to Publish, ensure Draft is selected
- The best practice is to reset all filters to as shown. I.e. nothing selected for **Created Start Date**, **Created End Date** or **Employees** search fields



The screenshot shows a filter interface for 'Service Note'. At the top, there is a dropdown menu labeled 'Service Note' and a blue 'Publish' button. Below this, there are several filter fields: 'Draft' (a dropdown menu with a downward arrow), 'Service Note' (a dropdown menu with a downward arrow), 'Created Start Date' (a text input field), 'Created End Date' (a text input field), and 'Employees' (a dropdown menu with a downward arrow). To the right of these fields is a blue 'Reset' button. At the bottom of the filter section, there are two buttons: 'Expand All' and 'Collapse All'.

# Using filters - Published

- Use the filters to quickly find what you need to
- If you are searching for a **Published** Service Note ensure **Published** is selected
- The best practice is to reset all filters to as shown. I.e. nothing selected for **Created Start Date**, **Created End Date** or **Employees** search fields



The screenshot shows a filter interface with the following elements:

- A dropdown menu labeled "Service Note" with a downward arrow.
- A blue button labeled "Publish".
- A row of filters: a dropdown menu labeled "Published" with a downward arrow, a dropdown menu labeled "Service Note" with a downward arrow, a text input field labeled "Created Start Date", a text input field labeled "Created End Date", a dropdown menu labeled "Employees" with a downward arrow, and a blue button labeled "Reset".
- Below the filter row are two buttons: "Expand All" and "Collapse All".

# Service Note - Recap

- We learned how to create a Service Note about a PWS
- After the note is Published it cannot be changed
- Notes cannot be edited once published, so leave it in Draft form until you are happy with the note
- Only people within that PWS' circle of support can view or create a Service Note
- Remember to use the filters in case you need to find something specific or cannot see what it is you want to, the filters may be set incorrectly.
- Once the note is published, you might need to hit Refresh to see it
- As mentioned, it might be a good idea to talk with your team to discuss if using a shared document for notes first then adding to Alayacare(CAPS) might work best for larger teams or homes

# Consult Note - Overview

- Consult Notes are notes recorded during a medical visit using the **HE23 Consultation Records Form**
- The form is uploaded directly to the PWS' information page
- Once the HE23 form is submitted, it will be available for your supervisor and others to review if needed.
- The HE23 form is approved automatically.
- There will be other forms to come that will require approval from others such as your supervisor.
- Let's preview the 5 steps to fill, upload and review the HE23 form

# Let's add a Consult Note – All Steps

1

Step 1 - Open Alayacare with SSO and navigate to correct PWS and click their name

2

Step 2 - Click **Care Management** and then **Client forms** in the left column

3

Step 3 - Click **+Add Client Form** and choose **HE23 Consultation Record**

4

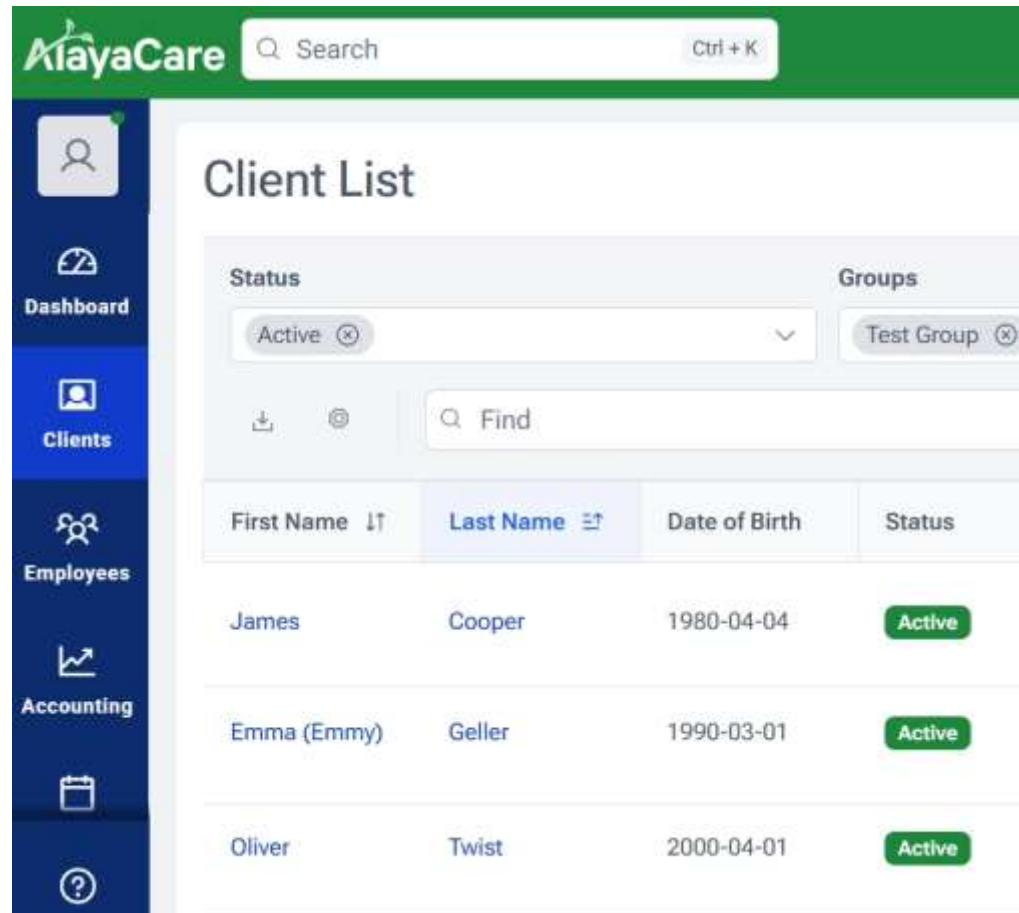
Step 4 - Fill in all **required fields\*** and sign the form digitally.

5

Step 5 - Click **Submit Form** to complete the process. You may need to refresh the screen to view the form

# Let's add a Consult Note – Step 1

- To begin, open Alayacare using your SSO (Single Sign on)
- Next, click CLIENTS (PWS)
- You will see a list of PWS that you are supporting
- Choose the PWS you supporting during the medical appointment by clicking their name

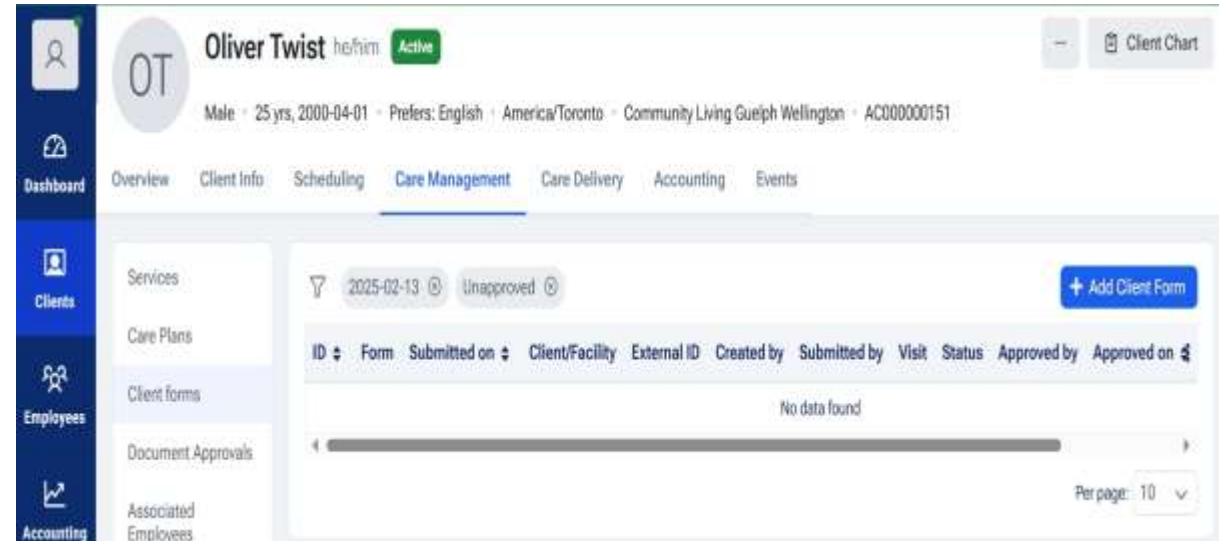


First Name	Last Name	Date of Birth	Status
James	Cooper	1980-04-04	Active
Emma (Emmy)	Geller	1990-03-01	Active
Oliver	Twist	2000-04-01	Active



# Let's add a Consult Note – Step 2

- Click on **Care Management** from the top bar
- Then click **Client Forms** from the left sidebar as shown
- Finally, click the button in the top right corner called **+Add Client Form**



OT Oliver Twist he/him Active Client Chart

Male • 25 yrs, 2000-04-01 • Prefers: English • America/Toronto • Community Living Guelph Wellington • AC000000151

Dashboard Overview Client Info Scheduling **Care Management** Care Delivery Accounting Events

Services  
Care Plans  
**Client forms**  
Document Approvals  
Associated Employees

2025-02-13 Unapproved + Add Client Form

ID	Form	Submitted on	Client/Facility	External ID	Created by	Submitted by	Visit	Status	Approved by	Approved on
No data found										

Per page: 10



# Let's add a Consult Note – Step 3

Add Form for Oliver Twist

Service \*

SGL-24/7 - Supported Group Living-2

☒ Active services only

Service Information

Status	Active
Start Date	--
Projected End Date	--

Service Form \*

Other

Other Form \*

HE23 - Consultation Record

Cancel
Start Filling

- After clicking **+Add Form**, you will see the popup box shown
- **Service\*** is SGL-24/7 (Supported Group Living 24/7 support) for Oliver
- Some PWS are supported by us under different services
- Under **Other Form\*** select **HE23 – Consultation Record** and click **Start Filling**
- A new window will open and load the form to be filled out



# Let's add a Consult Note – Step 4

Live Dashboard Visit reports **Forms** Data Exploration 2.0 Tasks v2 Data Migration

Client forms > HE23 - Consultation Record for Oliver Twist (9)

Section  
Consultation Record

The following pertinent information should be included in a consultation write up: Date of Appointment, Con  
Signature

Date of Appointment \*  
YYYY-MM-DD

Time of Appointment \*  
Time of Appointment  
--:--

- Once the form has loaded, fill in all required fields marked with an asterisk \*
- The forms will often have more info or context for each field shown in blue text
- Some forms may require a signature

# Let's add a Consult Note – Step 5

- For the HE23 Form, a signature is required\*
- To sign, click the quill icon (feather) and use the mouse cursor to sign your name
- New laptops and tablets are touch-screen, so you can use your finger or stylus etc.
- After signing the document, ensure all required fields are filled out and correct
- To finish, click **Submit Form**

Staff's Signature \*  
Sign your name



# ACTIVITY 2 – Add a Consult Note to Oliver

**Objective:** Write up a Consult Note for Oliver and attach the HE23 form to him.

**Scenario:**

- Annual Check up, Dr. Raymond Jones 9am May 30<sup>th</sup>, 2025
- Medication reviewed and renewed; advised against ibuprofen for headaches
- Sometimes gets headaches, dizzy spells, constantly thirsty
- Blood pressure 130/80, pulse at 60
- Weight 165lbs, height 135cm
- Blood work requested to check cholesterol possible diabetes concern.
- Requisition to be sent to lab
- Dr. Jones advised to monitor blood glucose levels daily until next appt on June 30<sup>th</sup>, 2025

# Consult Note - Recap

- We learned how to fill in a form and attach it to a PWS
- The HE23 form is an example of forms with required information \*
- Required fields will prevent missed signatures, dates, times etc.
- The HE23 form is automatically approved once completed and can be reviewed by others such as your supervisor
- Once a form is completed and submitted it cannot be edited
- Only individuals within the circle of care of the PWS can access their information page

# Updating PWS Demographic Information

- In CAPS you can immediately update PWS information yourself
- A new form called **CR63 - PWS Demographics Update** has been designed as a tool to make it easy and quick to update info and creates a record
- The **CR63 - PWS Demographics Update** form does not require supervisor approval. Information is updated instantly (may need a refresh to see changes)
- The CR63 will only update the information you need to update
- Using this form is optional, as you can update any info you need to manually
- Previously, PWS' info was in paper form in several places out of view

# Let's Update Oliver's Info– All Steps

1

Step 1 - Open Alayacare with SSO and navigate to correct PWS and click their name

2

Step 2 - Click **Care Management** and then **Client forms** in the left column

3

Step 3 - Click **+Add Client Form** and choose 'CR63 - PWS Demographics Update' form

4

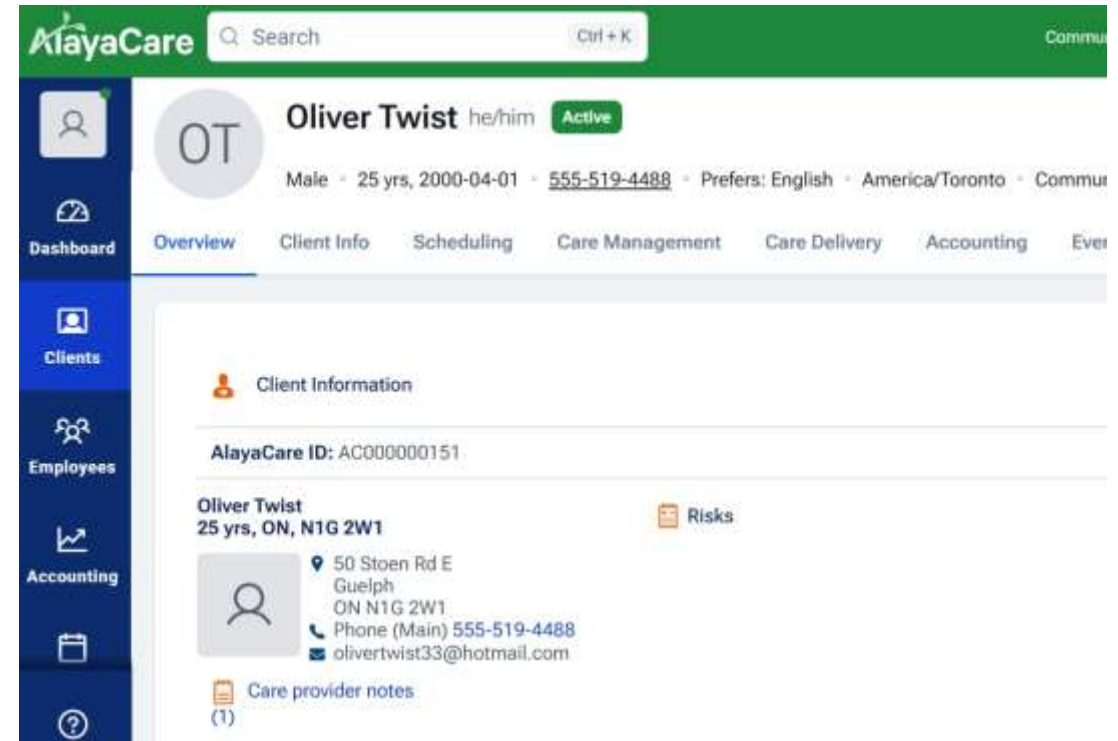
Step 4 - Fill in **only** the fields you need or want to change as no fields are required\*

5

Step 5 - Click **Submit Form** to complete the process. You may need to refresh the page to review changes

# Let's Update Oliver's Info – Step 1

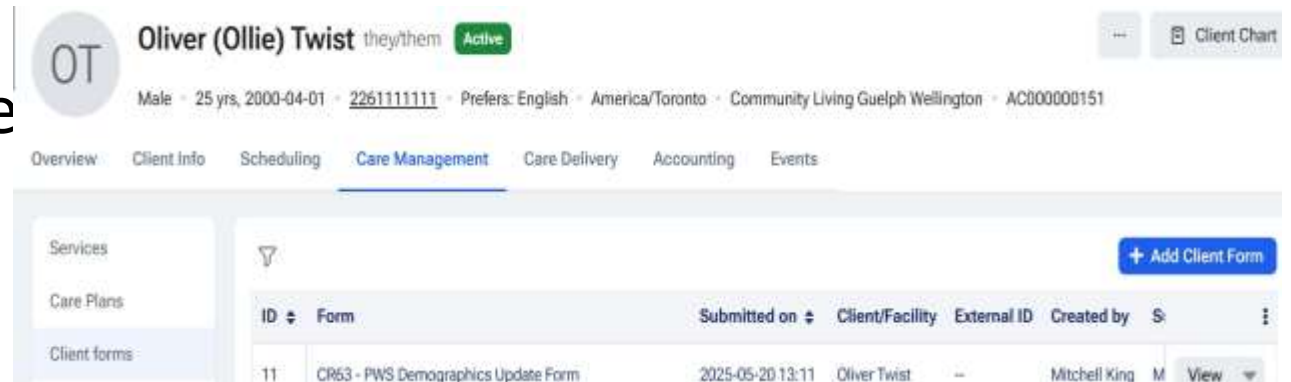
- To begin, open Alayacare using your SSO (Single Sign on)
- Next, click CLIENTS (PWS)
- You will see a list of PWS that you are supporting
- Choose **Oliver Twist** by clicking on his name





# Let's Update Oliver's Info – Step 2

- Click on **Care Management** from the top bar
- Then click **Client Forms** from the left sidebar as shown
- Finally, click the button in the top right corner called **+Add Client Form**
- The new form we will use is called '**CR63 - PWS Demographics Update**'



OT Oliver (Ollie) Twist they/them Active

Male · 25 yrs, 2000-04-01 · 2261111111 · Prefers: English · America/Toronto · Community Living Guelph Wellington · AC00000151

Overview Client Info Scheduling **Care Management** Care Delivery Accounting Events

Services  
Care Plans  
Client forms

+ Add Client Form

ID	Form	Submitted on	Client/Facility	External ID	Created by	S	
11	CR63 - PWS Demographics Update Form	2025-05-20 13:11	Oliver Twist	--	Mitchell King	M	View



# Let's Update Oliver's Info– Step 3

**Add Form for Oliver Twist** ×

Service \*

None

☒ Active services only

Form \*

CR63 - PWS Demographics Update Form

✕

Cancel

Start Filling

- After clicking **+Add Form**, you will see the popup box shown
- The **Service\*** field can be left blank
- Under **Form\*** select **CR63 - PWS Demographics Update Form** and click **Start Filling**
- A new window will open and load the form to fill out

# Let's Update Oliver's Info – Step 4

Client forms > CR63 - PWS Demographics Update Form for Oliver Twist (11)

Status

APPROVED 

Submitted by [Mitchell King](#) on 2025-05-20 13:11

CR63 - PWS D

1. New Section

- Update only the fields you need to
- Review to ensure accuracy
- After updating the form, click **Save**
- Once approved, the information entered in the form will automatically update
- No approval from your supervisor necessary

# ACTIVITY 3 – Updating Oliver's Info

**Objective:** Oliver needs to have his file updated with new information.

**Scenario:**

1. Oliver bought a new phone his cell number is now **519-555-2233**
2. He likes to be called **Ollie**, not Oliver.
3. His new email is: **oliver.twist7777@email.com**
4. His home address is wrong should be: **52 Stone Rd W**

# Updating Demographics Recap

- The new form to update demographics for the PWS called **CR63 - PWS Demographics Update Form**
- Using this form is optional; you can update information yourself manually
- The form creates a record of the change in case we need to roll back information
- Allows DSPs to make quick edits to PWS information
- Less chances of old or outdated information for the PWS
- **CR63** can be expanded and evolve to include other info if needed

# MODULE 4 – Learning Recap

- Logged into Alayacare(CAPS) with our SSO (Single Sign on). Single Sign On is a single password and login for multiple systems
- Created and published a Service Note and viewed it in Alayacare(CAPS)
- Learned how to fill out and attach a form to a PWS
- Explored using the HE23 as an example how forms will often have required information marked with an asterisk\*
- Quickly updated everyday information like a phone number or address change into Alayacare(CAPS) instantly

# Module 4 – Wrap Up & Questions Period

## This concludes Module 4 End User training

- Questions Comments?

### FAQ

- ***What happens if I don't have access to the internet?*** Alayacare/CAPS can be accessed and used in an offline mode
- ***What if I am out in the community? How do I access CAPS?*** Tablets will have their own SIM cards and 5G Internet
- ***Do I have to write Service Notes for everyone?*** Continue to use the same strategies you did before CAPS when writing your Service Notes. You likely already had a system that was working so continue with the same one you used previously
- ***Help! My Service Note is gone?*** No, use the filters to sort info quickly, you might have a filter on that prevents you from finding what you need to; such as the wrong **Group, Date** etc. needs to be selected before you can hit Publish
- ***I created a Service Note or form draft and don't need it anymore.*** You can delete drafts you don't need anymore or are duplicates
- ***I accidentally added a Service Note for the wrong person.*** Archive the wrong Note to hide it, and then cut and paste the info you typed already to the correct PWS



























