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
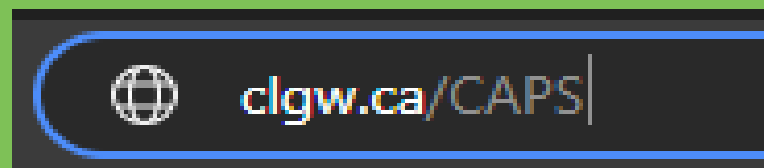
4. Press the Enter button to sign in

Other user

Enter your CLGW Username here →

Enter your CLGW Password here →

Sign-in options

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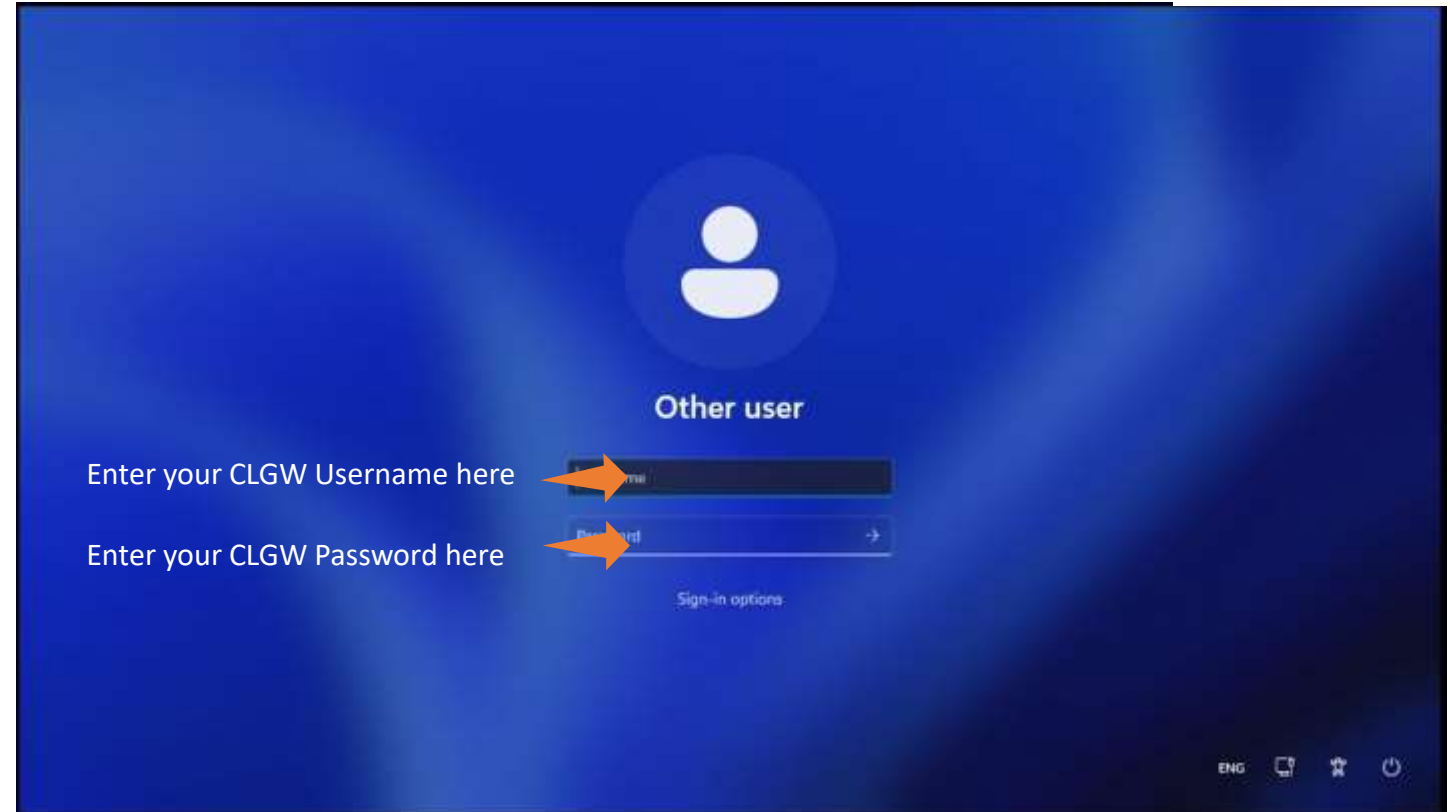
If you encounter any error messages or need assistance, please raise your hand and we will come over to assist you. Thank you :)

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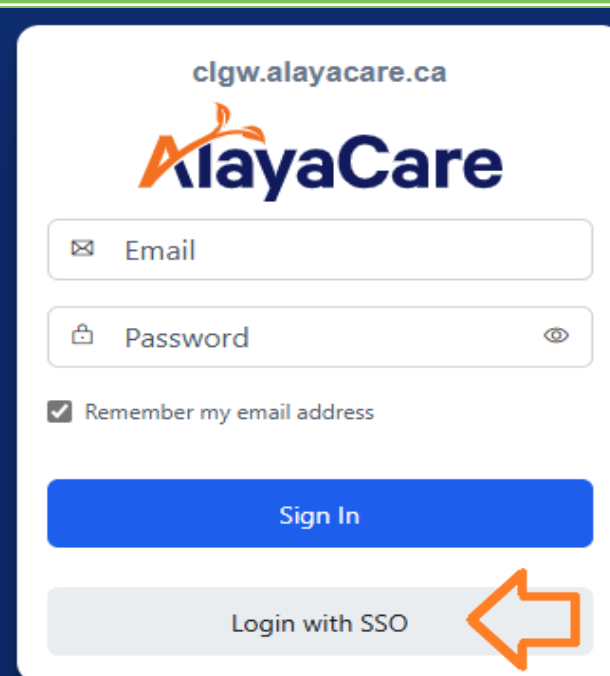Guelph Wellington

CAPS
CONNECT AND PLAN SERVICES

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
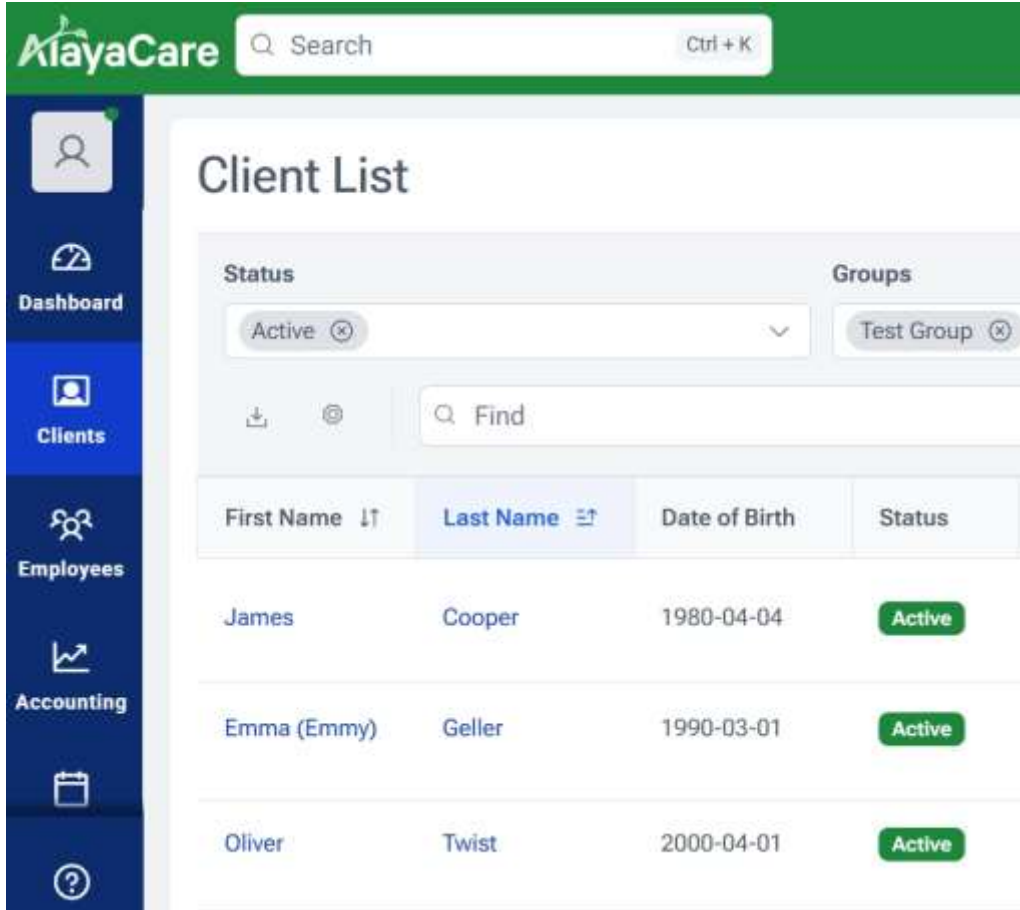
3

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
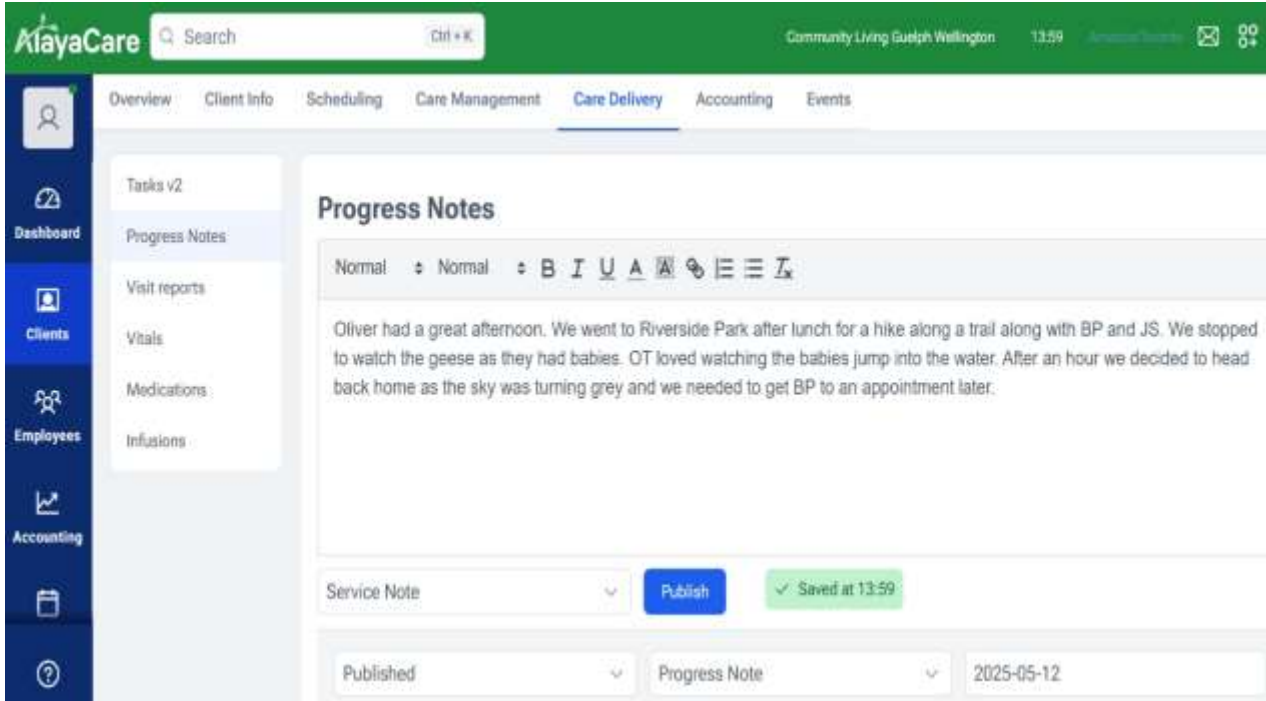
- To begin, open Alayacare using your SSO (Single Sign on)

- 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
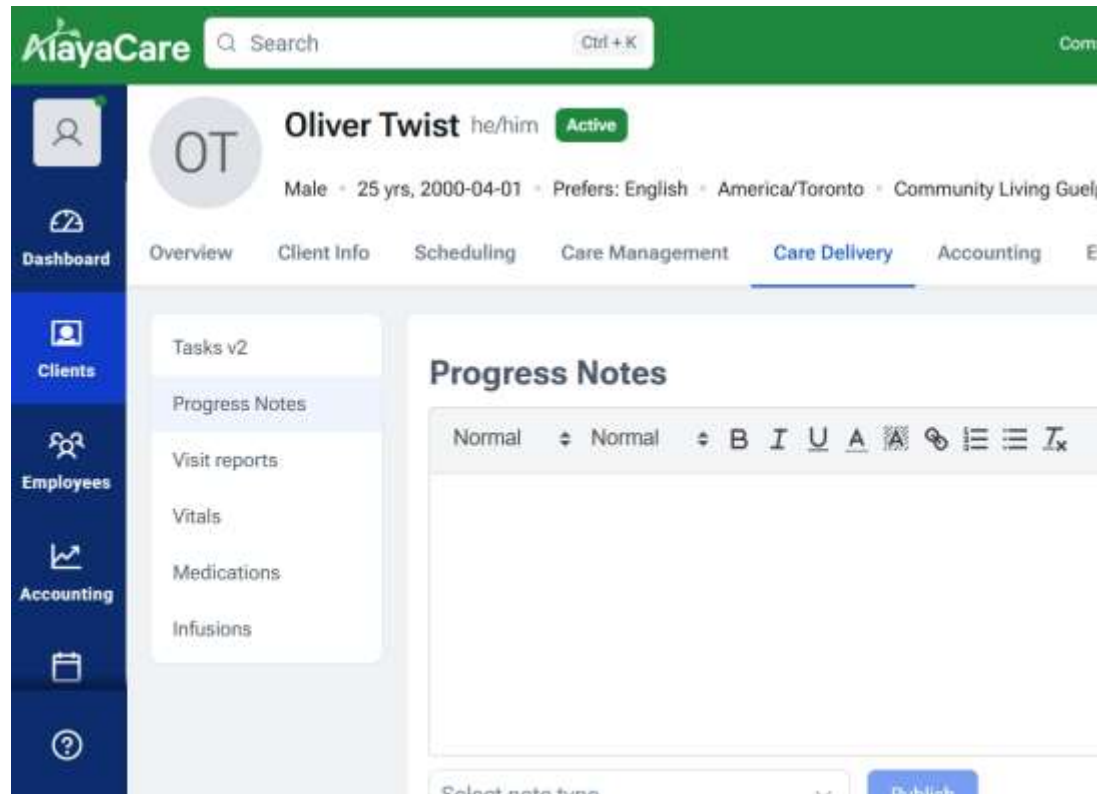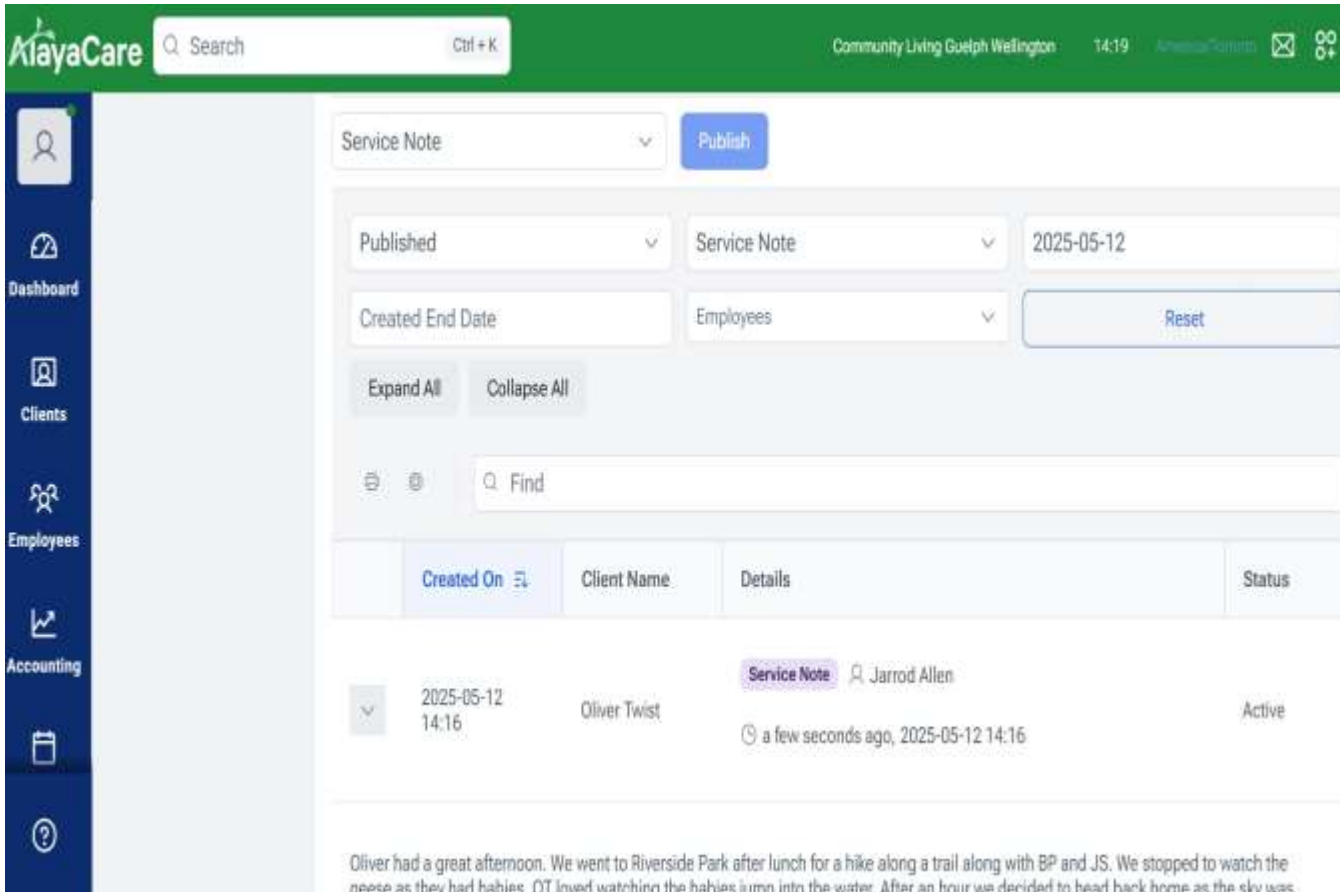
- Click on **Care Delivery** along the top

- 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

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

System will show:

1. Who wrote the Service Note

2. Time it was published

3. 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 <u>before</u> 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

ACTIVITY 1 – Add a Service Note to Oliver
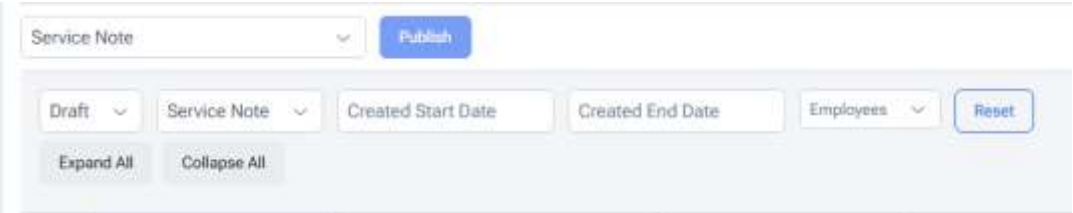
Objective: Write a Service Note for Oliver Twist as the 7am-3pm person.

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
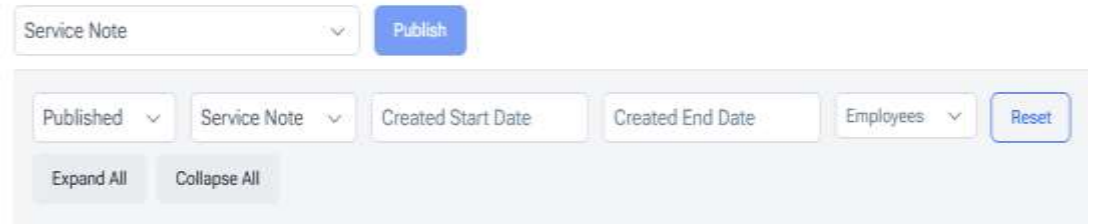
- Use the filters to quickly find what you need to

- 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

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

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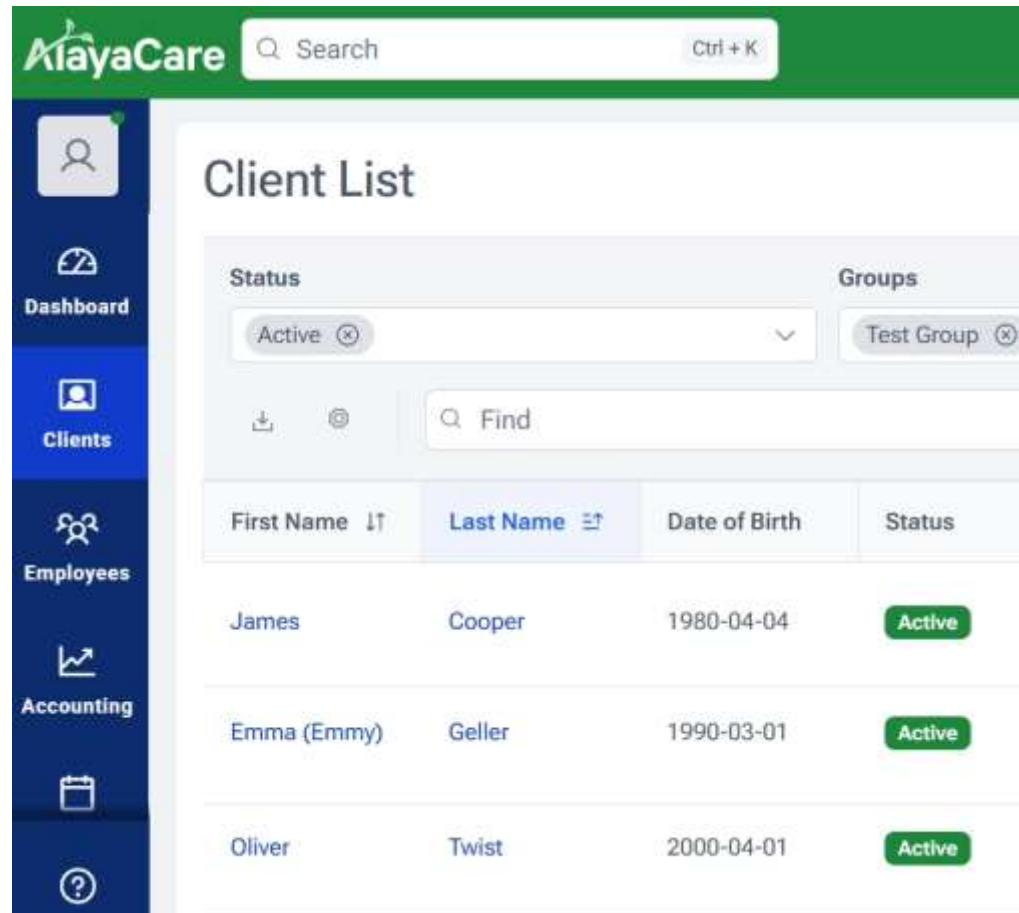
Step 4 - Fill in all **required fields*** and sign the form digitally.

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
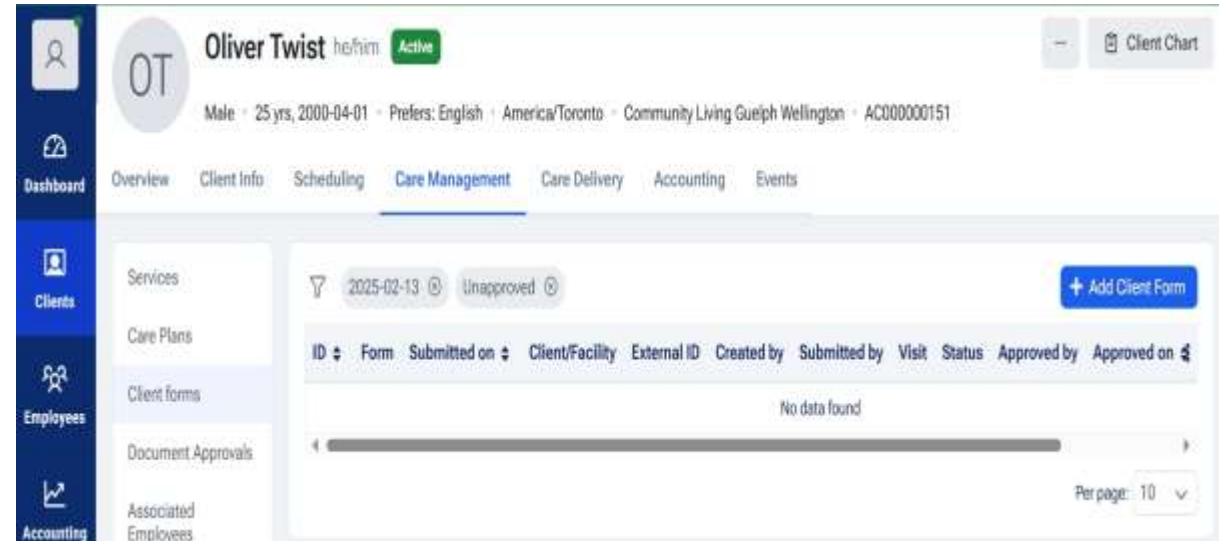
Let's add a Consult Note – Step 2

- 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**

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

- 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**

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 30th, 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 30th, 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 <u>does not</u> 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

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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
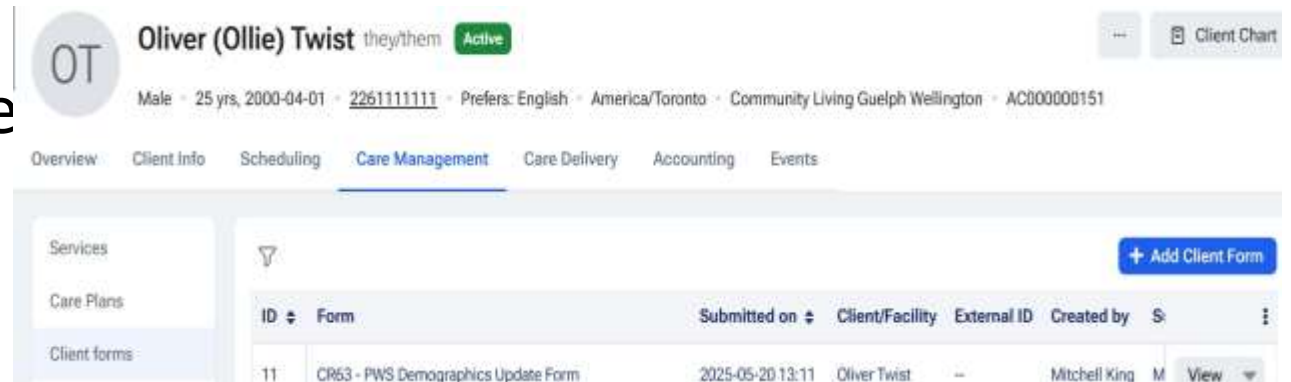
- To begin, open Alayacare using your SSO (Single Sign on)

- Next, click CLIENTS (PWS)

- You will see a list of PWS that you are supporting

- Choose **Oliver Twist** by clicking on his name
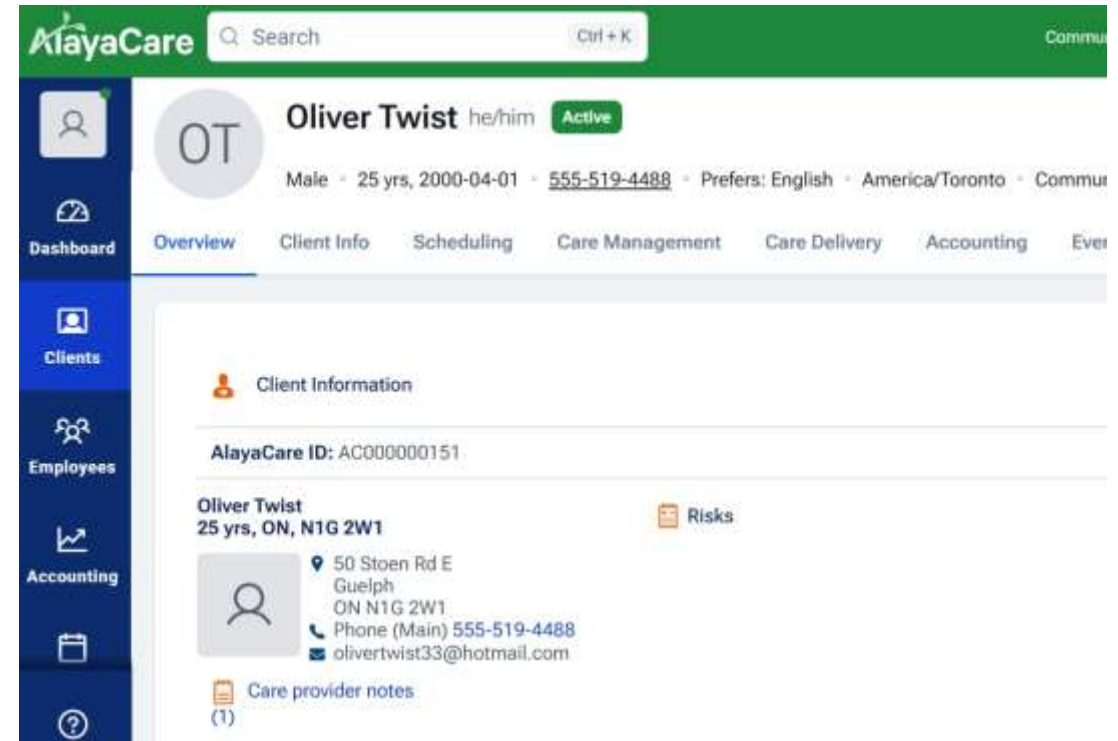
Let's Update Oliver's Info – Step 2

- 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**'

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