



FEPS OCMS: User Guide

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Before Getting Started

OCMS is a cloud based system which can be accessed through any web browser. It requires internet access for use, and all information is stored remotely rather than on the user's computer.

OCMS is accessed at: <https://www.ocmscanada.org>

You will require a Username and Password to use the system. The first time you log in, you will be prompted to change your password to a new one.

Access to MIS

FEPS uses the OCASI Client Management System (OCMS) to store the participant data from One-on-one Problem Solving sessions.

The system is preset to include the FEPS program Services and Outcomes.

Each agency can assign staff to the programs.

Every staff member has to belong to at least one Agency Program.

Front line staff - can submit their services, run their own reports.

Manager - can add/edit other members to Program. A Manager can also run reports and filter by Program.

Agency Admin- can do everything in OCMS- see all programs data, generate all reports, create agency specific questions.

Inform OCASI to add a new user or when a user leaves, OCASI will create/deactivate account as needed.

(FEPS sites will need to identify an Agency Admin person for their own site).

In This Guide

- Understanding the Interface
- Workflow: "Cheat Sheet" Sequence of Steps
- Add a New Client
- Edit a Client Record
- Adding a New Session
- Glossary of Benefits/Financial Outcomes

Understanding the Interface

The first step is to log into the OCMS at <https://www.ocmscanada.org> using your assigned ID and password.

When you first sign in to the OCMS it will look something like this.

Note the **My Tasks** menu at the left, which includes search options such as: **Find Client/Activity**, **Find Session**, **Register New Client**, and **Begin New Session**.

The screenshot shows the OCMS User Dashboard. On the left is a 'My Tasks' menu with the following items: Home, Find Client/Activity, Find Session, Register New Client, Register New Activity, Begin New Session, Manage Agency Partners, Manage Agency Teachers, Manage Agency Programs, Reporting, My Reports, Training, FAQ, Knowledgebase, Online Videos, Webinars, Administration, My Profile, Contact OCMS Staff (leave OCMS), About OCMS, and Privacy. The main dashboard area has three tabs: 'My Incomplete Sessions' (selected), 'Today's Updated Sessions', and 'Today's Updated Clients'. Below the tabs is a table with columns: '#', 'Session #', 'Service Date', 'Session Type', and 'Participants'. The table contains the message 'No sessions with incomplete forms.' At the bottom of the dashboard, there is a 'Welcome to OCMS!' message dated 2016/03/21, followed by the text: 'OCMS was developed in 2013. We are excited to offer you access to the new system and we look forward to continue to work with you to make it a success.'

Home – Brings you back to the User Dashboard

Find Client/Activity – How to search for a client already in the system. Individual clients are referred to as **Clients** within the OCMS.

Find Session – How to search for a client session which has already been recorded.

Register New Client – To register a new client currently not included in the OCMS system, or visiting for the first time.

My Incomplete Sessions – This is the default menu shown on the user dashboard. Shows all client sessions with incomplete forms.

Today's Updated Sessions – Shows all sessions you worked on that same day.

Today's Updated Clients – Shows all the client profiles you updated that same day.

Knowledgebase – Takes you to a support articles and videos on a variety of OCMS tasks, and help requests.

Workflow: “Cheat Sheet” Sequence of Steps

To Add a NEW Client

1. Program participants are referred to as “Clients” within the OCMS. First check to make sure they are not already registered. From User Dashboard click “**Find Client/Activity**” to search for them.
2. If they don’t exist yet in the OCMS, from User Dashboard – click “**Register New Client**”. Choose “**Named Client**” or “**Anonymous Client**”
 - a. **Named Clients** require a statement of consent, and create a profile including information such as first and last name, year of birth, country of origin etc. By capturing this information the OCMS system will create a profile for the named client that connects the client’s profile and previous visits. The agency’s named clients are easily searchable within the agency.
 - b. **Anonymous Clients** are assigned a Client Number in the OCMS but are not tracked by name. Anonymous Clients require only information on Gender (Male/Female/Other), Immigration Status (may select Unknown), Registration Date, and Registration Site.
3. Enter **client information** into the Registration form.
 - a. Required Client Information (for FEPS): First Name, Last Name, Gender, Date of Birth, Arrival Date, Agency, Country of Origin, Immigration Status, Aboriginal Status, Preferred Official Language, Income, Children, Referral Source
 - b. Required Client/Agency History Information (for FEPS): Date of First Agency Visit In Program (date they first came to FEPS), New/Repeat Status of Client Prior to OCMS (New or Returning Client)
 - c. Required Contact Information (for FEPS): Telephone, Street Number, Street, City, Province, Country, Postal Code. Postal Code is also required by the OCMS, and must be entered or the profile will not be saved.
4. Input user password to input **Sensitive Information** which includes **Financial Information**.
5. Input other client information as desired.
6. Click **Register**.
7. Add a Family Member
 - a. From top of Client Profile
 - b. Added Family Member must have accepted the Privacy Statement in order to have a Profile listed
 - c. Enter information and Save.

To Edit a Client Record

1. Find a **Client Record**
 - a. Can search by any identifying name, client number, etc.
 - b. **Anonymous** clients must be searched by Client Number
2. Edit fields as required, and Save.

To Add a New Client Session

1. Find a **Client Record**
2. **Begin New Session**
 - a. From Client Profile or from User Dashboard
3. Create New Session
 - a. Select **Direct Service (Finance)** for **Session Type**, input Session information and **Save Session**. (Required information: Delivery Method, Type of Institution/Organization, Interpreter, Service Time, Delivery Language, Staff Involved)
4. Adding FEPS Client
 - a. If not starting from the Client Profile, you will need to first **Select the Client**
 - b. From the **Clients & Forms** section, Click on [+] and then **Edit** to open up the **Financial Services and Outcomes** Form
5. Financial Services and Outcomes Form
 - a. To add a Service or Outcome, click the **check-box** for **Services and/or Outcomes**
 - b. The Services and Outcomes will appear below.
6. Adding Financial Services and Outcomes
 - a. Click the [+] sign to add a Service under its category (Asset-Building, Money Management, etc.), check **Info** and/or **Action**, and click **Update**.
7. Comments
 - a. There is an open **Comments** box at the bottom of the Services and Outcomes sections for any other information you need to input.
8. Save to Finish
 - a. Click **Save** at the top of the screen.

To Add a NEW Client

Client Search - Find a Client in My Agency



Client Search allows you to find clients that have registered with your Agency. If this is a new client, it is recommended that you search for the client within your Agency and the Welcome Centre prior to creating a new client profile. This will ensure that the client has not been already registered with your Agency and that a single client profile is created for the client. You can search for a client by entering one or more of the specified fields below. The search results will provide you with a list of clients that meet your search criteria. Once you identify the client click on 'select', this will open the client profile and session history.

Client Type

Client Identifier

Client #

First Name

Last Name

Family Code

Registration Date -

Registration Site

Telephone

Postal Code

Email

Comments

Additional Options [[Show / Hide](#)]

#	Client #	Name
No matches.		

1. Check for Duplicates

First, search the OCMS to check for their name.

- Click **Find Client/Activity** to look up if client already exist to avoid duplication. (See User Dashboard screen shot on p1)
- Enter a piece of information and click **Search**.
- Proceed to **Register a New Client** when the result shows "No matches"
- **Additional Options** allow more search parameters including Date of Birth.

2. Register New Client

You have a choice to add a **Named Client** or **Anonymous Client**

2a. Adding a Named Client

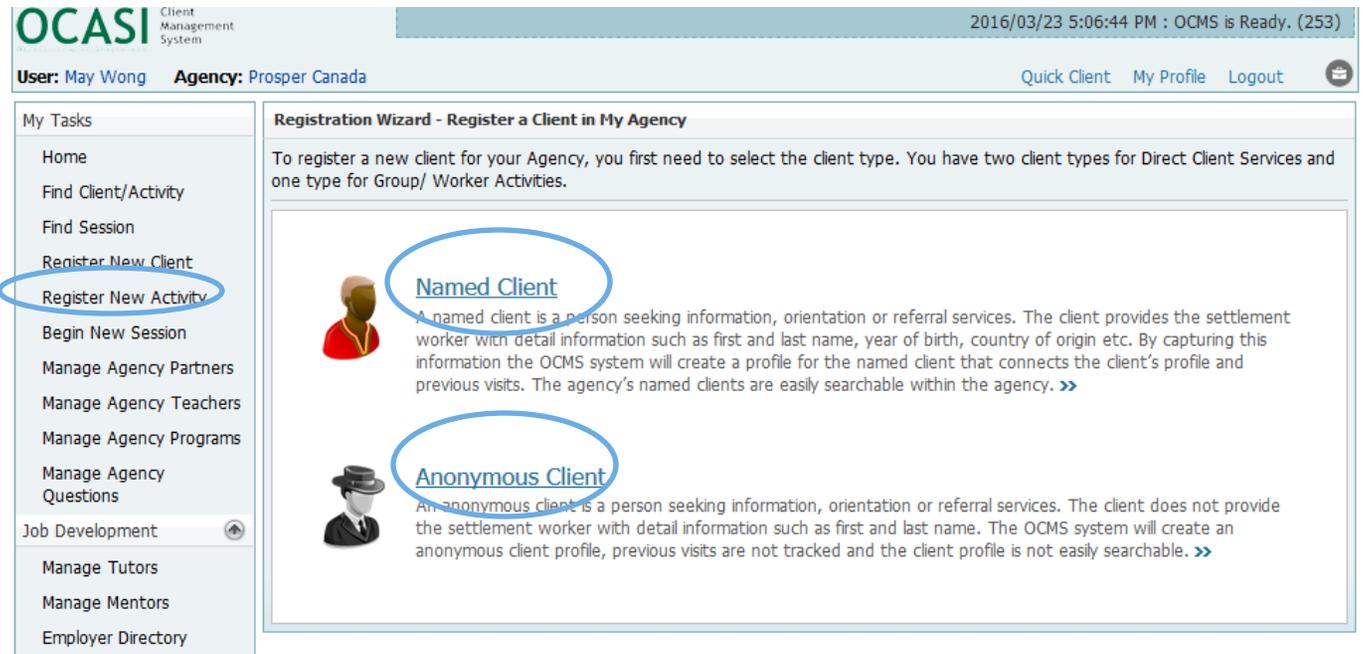
It is a prerequisite to accept the **Privacy Statement** for client to be recorded. Non acceptance will be treated as **Anonymous Client**. This can be done verbally or in writing.

After the statement is accepted, the demographic details screen will load for data entry.

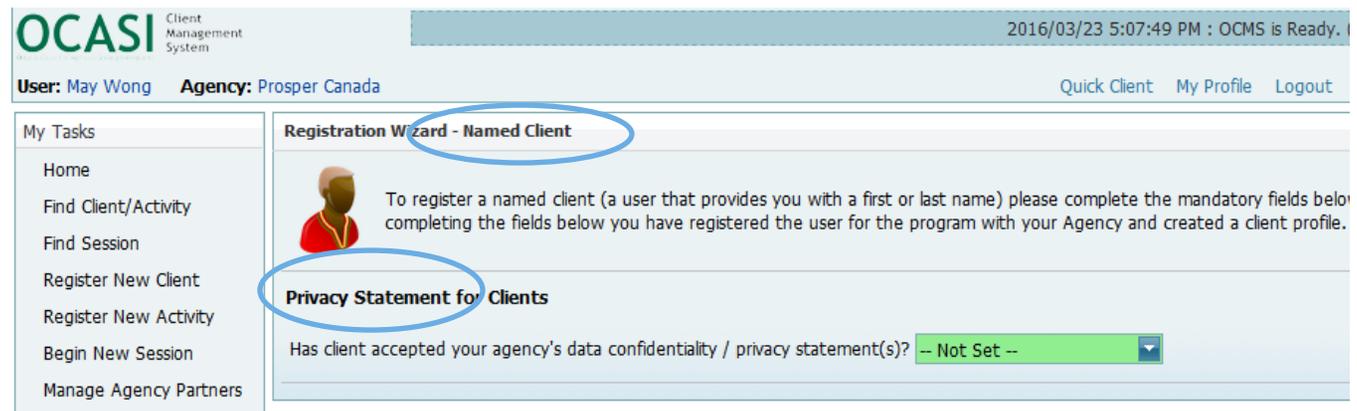
Not all fields in OCMS are required for FEPS. OCMS is structured for multiple settlement organizations and contain more fields than required for FEPS.

Any field in **green** is mandatory and must be answered in order to save a record.

Any field in **yellow** relates to iCare which may or may not be applicable to FEPS. Yellow fields are not mandatory for the OCMS itself.



The screenshot shows the OCMS Client Management System interface. The top header includes the OCASI logo, the text 'Client Management System', the date and time '2016/03/23 5:06:44 PM : OCMS is Ready. (253)', and user information 'User: May Wong Agency: Prosper Canada'. There are links for 'Quick Client', 'My Profile', and 'Logout'. A left-hand navigation menu lists various tasks, with 'Register New Client' and 'Register New Activity' circled in blue. The main content area is titled 'Registration Wizard - Register a Client in My Agency' and contains instructions: 'To register a new client for your Agency, you first need to select the client type. You have two client types for Direct Client Services and one type for Group/ Worker Activities.' Below this, there are two options: 'Named Client' (with a person icon) and 'Anonymous Client' (with a person icon wearing a hat). Both options are circled in blue. The 'Named Client' description states: 'A named client is a person seeking information, orientation or referral services. The client provides the settlement worker with detail information such as first and last name, year of birth, country of origin etc. By capturing this information the OCMS system will create a profile for the named client that connects the client's profile and previous visits. The agency's named clients are easily searchable within the agency. >>' The 'Anonymous Client' description states: 'An anonymous client is a person seeking information, orientation or referral services. The client does not provide the settlement worker with detail information such as first and last name. The OCMS system will create an anonymous client profile, previous visits are not tracked and the client profile is not easily searchable. >>'



The screenshot shows the OCMS Client Management System interface, similar to the previous one. The top header includes the OCASI logo, the text 'Client Management System', the date and time '2016/03/23 5:07:49 PM : OCMS is Ready.', and user information 'User: May Wong Agency: Prosper Canada'. There are links for 'Quick Client', 'My Profile', and 'Logout'. The left-hand navigation menu lists various tasks, with 'Register New Client' circled in blue. The main content area is titled 'Registration Wizard - Named Client' and contains instructions: 'To register a named client (a user that provides you with a first or last name) please complete the mandatory fields below completing the fields below you have registered the user for the program with your Agency and created a client profile.' Below this, there is a section titled 'Privacy Statement for Clients' (circled in blue) with the text 'Has client accepted your agency's data confidentiality / privacy statement(s)?' followed by a dropdown menu showing '-- Not Set --' (highlighted in green).

The data we are collecting for FEPS are highlighted on the screen captures below for reference, with **red dots**.

2016/03/23 5:07:49 PM : OCMS is Ready. (253)

rosper Canada Quick Client My Profile Logout

Registration Wizard - Named Client

 To register a named client (a user that provides you with a first or last name) please complete the mandatory fields below. By completing the fields below you have registered the user for the program with your Agency and created a client profile.

Privacy Statement for Clients

Has client accepted your agency's data confidentiality / privacy statement(s)? **Yes**

Client Consents

Consent for Future Research/Consultation **No**

Has the client's consent to be contacted by your agency been given and documented? -- Not Set --

For display purposes and advertising does the client consent to having his/her picture taken? -- Not Set --

Client Information

First Name **Peter** Agency **Prosper Canada**

Last Name **Rabbits** Initial Destination

Gender **Male** Country of Origin **Australia**

Preferred Name Last Residence -- Not Set --

Date of Birth **1991/06/03** Imm. Class -- Not Set --

Marital Status -- Not Set -- Imm. Status **Permanent Resident**

Family Code New... Find... Imm. Card Type -- Not Set --

Landing Date Aboriginal Status -- Not Set --

Arrival Date **2014/12/24** Preferred Official Language **English**

Re-entry Date

Identification Documents

[+]	Client Identifier	Identifier Value
	Enter a Client Identifier	

No data to paginate

Client/Agency History Prior to OCMS

Date of First Agency Visit in Program **2016/04/26**

New/Repeat Status of Client in Agency Prior to OCMS **New Client**

#	Agency Program	Answer	First Visit	Prior Visits
Edit	FEPS	New Client	2016/04/26	0

Page 1 of 1 (1 items) [1]

Contact Information

Email Safe to contact?

Telephone **() - x** Safe to contact?

Telephone (Alt1) () - x Safe to contact?

Telephone (Alt2) () - x Safe to contact?

Number **23**

Street **Chicago Street**

Type -- Not Set --

Direction -- Not Set --

Unit

City **Toronto**

Province **Ontario**

Country **Canada**

Postal Code **M4T 1N5**

Consent for Future Research/Consultation = For the duration of FEPS program funding through MCSS (i.e. March 31st, 2017), this question is for collecting a pool of potential interviewees for the external evaluator, Goss Gilroy Inc. After FEPS program funding, this question can be used internally in agency.

2b. Adding an Anonymous Client

A participant may choose to remain anonymous and not provide either their first or last name. In this case they must be registered as an **Anonymous Client**.

There are still four required fields for anonymous clients:

- **Gender** (Male, Female, or Other)
- **Immigration Status** (choose from several options, including 'Unknown' is an option)
- **Registration Date**
- **Registration Site**

Registration Wizard - Anonymous Client

 To register an anonymous client (a user that does not wish to be identified and therefore will not provide a first or last name) please complete the mandatory fields below. By completing the fields below you have registered the client for the program with your Agency and created an anonymous client profile.

Agency: ABC Demo Agency

Client Name: Anonymous Client

Gender: -- Not Set --

Arrival Date: [Dropdown]

Imm. Status: -- Not Set --

Postal Code: [Input] [Input]

Registration Date: 2016/04/22

Registration Site: [Green Box] Find...

Site Name: [Input]

Comments: [Text Area]

Register Clear

Anonymous Clients may only be **searched** according to **Client Number**.

An Anonymous Client cannot be changed into a Named Client later on, in the OCMS.

Client Search - Find a Client in My Agency

 Client Search allows you to find clients that have registered with your Agency. If this is a new client, it is recommended search for the client within your Agency and the Welcome Centre prior to creating a new client profile. This will ensure client has not been already registered with your Agency and that a single client profile is created for the client. You can find a client by entering one or more of the specified fields below. The search results will provide you with a list of client meet your search criteria. Once you identify the client click on 'select', this will open the client profile and session history.

Client Type: Anonymous Client

Client #: [Input]

Comments: [Text Area]

Registration Date: [Dropdown] - [Dropdown]

Search... Clear

3. Entering Client Information

Required fields for FEPS program input are as indicated with red dots as on the page above: First Name, Last Name, Gender, Marital Status

Required fields for the OCMS are in **green** (in the interface)

Arrival Date = Date of Arrival to Canada. May be estimated if the client can't remember exact date. For those born in Canada, indicate 'citizen by birth' or 'Citizen (Aboriginal)'.

Client Information

Required Client Information (for FEPS):

First Name, Last Name, Gender, Date of Birth, Arrival Date, Agency, Country of Origin, Immigration Status, Aboriginal Status, Preferred Official Language

Immigration Status should be filled in for all participants.

For those born in Canada, indicate 'citizen by birth' or 'Citizen (Aboriginal)'.

Aboriginal Status should ONLY be filled in for those who identify as a member of one of Canada's Aboriginal groups.

Date of Birth

For Any Date, clicking on the drop-down menu will pull up a **calendar page**. Clicking on the month/date at the top will show only Month and Year options for easy selection, then the day may be selected.

Dates can also be typed in manually, skipping the drop-down menu.

Arrival Date: If the participant doesn't remember their exact arrival date, this may be estimated.

The image shows a screenshot of a 'Client Information' form. The form is divided into two columns. The left column contains fields for First Name (Jane), Last Name (Smith), Gender (Female), Preferred Name (Jane), Date of Birth (1980/10/22), Marital Status (Single), Family Code, Landing Date, Arrival Date (2014/02/03), and Re-entry Date. The right column contains Agency (ABC Demo Agency), Initial Destination, Country of Origin (Australia), Last Residence (-- Not Set --), Imm. Class (Family Sponsorship), Imm. Status (Permanent Resident), Imm. Card Type (Permanent Resident Card), Aboriginal Status (-- Not Set --), and Preferred Official Language (English). A blue arrow points from the Date of Birth field to a calendar interface. The calendar shows the month of April 2016, with the 21st highlighted. A second blue arrow points from the calendar to a year selection interface, which shows the year 2016 selected.

Contact Information

Required Contact Information (for FEPS):

Telephone, Street Number, Street, City, Province, Country, Postal Code. **Postal Code is also required by OCMS.** If the participant does not know their postal code, use the postal code for your Agency office.

Safe to Contact? = If this box is left blank, it will be interpreted as “no.”

Client/Agency History Prior to OCMS

Date of First Agency Visit in Program = Date of first visit to FEPS. (First visit since the agency began offering FEPS services officially.)

New/Repeat Status of Client in Agency Prior to OCMS (drop down menu) = If their first visit to FEPS was before entering their profile into OCMS, they are a **Returning Client**. If their first visit to FEPS is the day they are first entered into OCMS, they are a **New Client**.

For a **New Client**, “Prior Visits” = 0.

For a **Returning Client**, “Prior Visits” = number of previous one-on-one problem solving FEPS sessions recorded.

Required Client/Agency History Information (for FEPS): Date of First Agency Visit In Program (date they

Contact Information

Email Safe to contact?

Telephone Safe to contact?

Telephone (Alt1) Safe to contact?

Telephone (Alt2) Safe to contact?

Number

Street

Type X

Direction X

Unit

City

Province X

Country X

Postal Code

Client/Agency History Prior to OCMS

Date of First Agency Visit in Program 2015/10/05

New/Repeat Status of Client in Agency Prior to OCMS Returning Client

#	Agency Program	Answer	First Visit	Prior Visits
Edit	FEPS	New Client	2015/10/01	0

MS 2016/05/04

Returning Client

New Client

Returning Client

New Client

first came to FEPS), New/Repeat Status of Client Prior to OCMS (New or Returning Client)

To add this information to the Agency Program menu, click the [+] sign, then input the **New/Returning Client, First Visit, and Prior Visits** information. **First Visit** = first FEPS one-on-one problem solving visit.

Click Update to complete the information input, otherwise it will not be saved.

Language

This information only needs to be entered if you wish to record a language for the participant in addition to their preferred official language.

To add this information to the Agency Program menu, click the [+] sign, then input the **Language** information in the drop-down menu, and any **Comment** in the open field.

[+]	Language	Comment
Update Cancel	English	

No data to paginate < >

Click Update to complete the information input, otherwise it will not be saved.

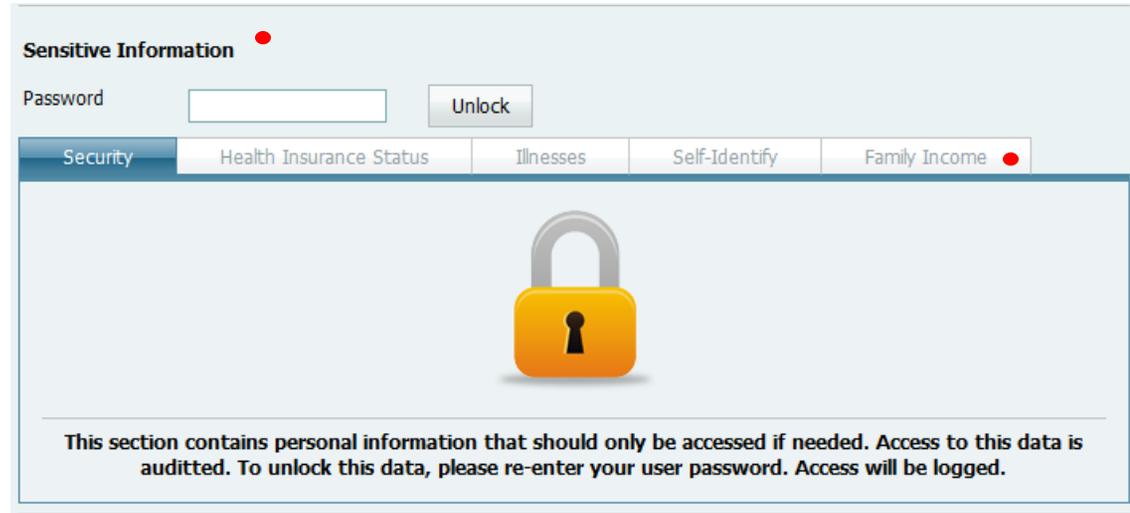
Sensitive Information

FEPS records information about **finances and income**. This information is deemed **Sensitive Information** in the OCMS client information, and must be accessed by password. Input your user password to access the **Family Income** menu.

Only the type of Income support is required, Start Date/End date are optional.

Multiple Income Support sources may be entered.

(If your computer settings are set to automatically save passwords for websites you trust, you may not be shown the lock for this step.)



Sensitive Information

Password

Security Health Insurance Status Illnesses Self-Identify **Family Income**



This section contains personal information that should only be accessed if needed. Access to this data is auditted. To unlock this data, please re-enter your user password. Access will be logged.

Sensitive Information

Health Insurance Status | Illnesses | Self-Identify | **Family Income**

Family Income

Family Income: -- Not Set --

Income (\$):

How many people does this income support? 0

Income Support

[+]	Value	City	Start	End	Note
No data to display					
No data to paginate					

Income Support

[+]	Value	City	Start	End	Note
No data to paginate					

Agency Specific Q

Question	#	Answer	Comments
<ul style="list-style-type: none"> Income/Social Assistance Employment Insurance (EI) Employment Insurance (EI) Reach Back (within the last 3 years/5 years Parental EI) Disability Assistance Dependent of Disability Assistance Recipient Crown Ward Extended Care and Maintenance No Income 			

Family Income = Gross family income in the range that best describes the family's income range as per line 150 of most recent tax return and benefit return.

Children

To add children to the client record, first click the **[+]** to add, then fill in the child's information as desired.

Age Groups are defined by 4 different age ranges rather than number of years.

Leave this section blank if participant has no children, or if this information is unknown.

Completing the Registration

Registration Date and **Registration Site** are required fields. These must be completed before the registration can be finalized.

Registration Date would be the date the participant first came to FEPS.

If you have missed any required fields, these will be shown to you as warnings before you can complete the registration (see page above).

To complete the participant registration, click **Register**. This should only take a moment to complete. If you do not click **Register**, any information input will not be saved.

Children

[+]	Child Name (Optional)	Age Group	Date of Birth	Note
Update Cancel	<input type="text"/>	<input type="text" value="X"/> <input type="text" value="v"/> Infant (6-18 Months) Toddler (19-35 Months) Pre-school (36 Months - 6 years) School Age (More than 6 years)	<input type="text" value="v"/>	<input type="text"/>
No data to paginate < >				

About this Registration

Primary Worker

Registration Date

Registration Site

Site Name

[+]	Learned About Agency	Comment
Enter a Source.		

For Trusted Partner Clients Only

No agencies are currently configured to lookup your agency for Trusted Partner clients.

Comments

Successful Registration

If a required field for the OCMS is left blank or incorrectly filled in, you will receive a **warning**, and the OCMS will not complete the registration until the field is filled in. (Examples at right)

The system will ask whether you want to “save without Client ID.” **It is OK to click YES** – in this case ID means Identification Documents, which are not required for FEPS program input. When the client profile has been successfully saved, an indicator message will appear at the top of the screen.

Program = OCMS Settlement Program is the default option within the OCMS.

Agency = This is the Agency registered with your User Profile, indicated when you click “My Agency” in the Client Profile.

At this point, there are four options:

Return to Client Profile = if you want to update or change any of the Client information.

Print Registration Receipt = this will offer a printout of all the intake information in the Client Profile.

Register Another Client = as it indicates.

Begin Session with Client = Add a Session with Services and/or Outcomes for the Client you just registered.

Client Consents

Consent for Future Research/Consultation	-- Not Set --	X	!
Has the client's consent to be contacted by your agency been given and documented?	-- Not Set --	X	
For display purposes and advertising does the client consent to having his/her picture taken?	-- Not Set --	X	

City	
Province	-- Not Set --
Country	Canada
Postal Code	M4T 177

2016/04/26 2:57:12 PM : Client was successfully saved. (253)

Agency: Prosper Canada

Quick Client My Profile Logout

Registration Wizard - Named Client

 Confirmed, a client profile has been created for this user.

Registration was successful. The client has been registered in the following Program and Agency:

Client	Alilcia Florrick (1372512)
Program	OCMS Settlement Program
Agency	Prosper Canada

Save As: Adobe PDF

Print In: English

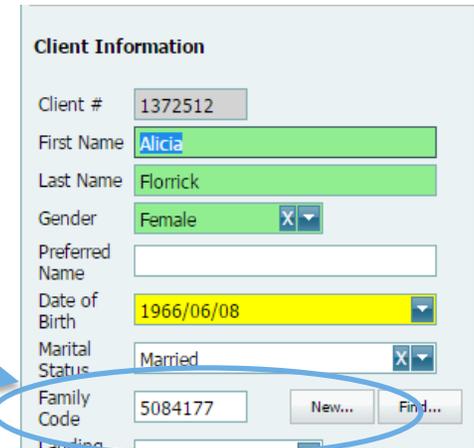
[Return to Client Profile](#) [Print Registration Receipt](#) [Register Another Client](#) [Begin Session with Client](#)

4. How to record Family Members (i.e. a Spouse)

Any client record can have children added, as shown above. To add a spouse, the spouse must have their own record created as a **Named Client**.

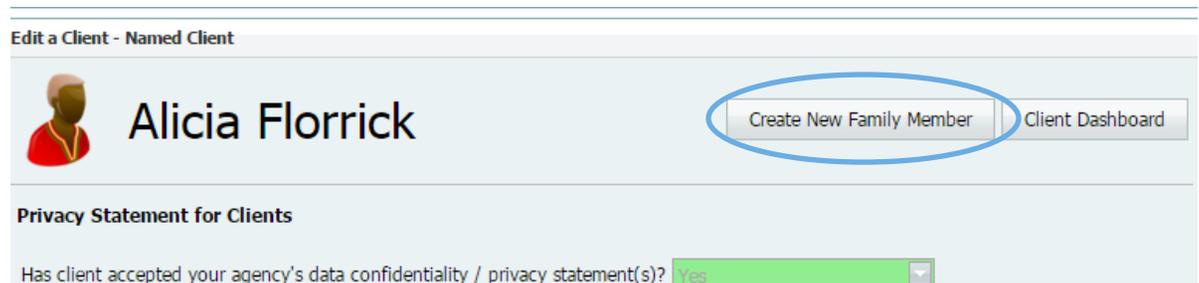
The first step is to **Find the Client Record** for the first spouse. (As indicated in the previous pages).

Then, make sure this Client has a **Family Code** set. If it is not set, click “New” to create one.



The screenshot shows a 'Client Information' form with the following fields: Client # (1372512), First Name (Alicia), Last Name (Florrick), Gender (Female), Preferred Name (empty), Date of Birth (1966/06/08), Marital Status (Married), and Family Code (5084177). The 'Family Code' field is circled in blue, and a blue arrow points to it from the left.

Next, click **Create New Family Member** for this client.



The screenshot shows the 'Edit a Client - Named Client' page for Alicia Florrick. The name 'Alicia Florrick' is displayed next to a profile icon. The 'Create New Family Member' button is circled in blue. Below the name, there is a 'Privacy Statement for Clients' section with a dropdown menu set to 'Yes'.

(This step CONTINUES next page...)

This new Family Member must also accept the **Privacy Statement** for Clients before proceeding with the record, as for any other Named Client. Once the **Privacy Statement** has been accepted, the full record appears.

Fill in the Client Information for the new family member as desired, and remember to click **Register** at the bottom of the screen to finalize the entry.

If you wish to record a Family Member for the original Client but NOT input them as an individual **Client** in the system (i.e. if you want to make note of the Family Member just for information purposes), this could also be recorded in the original Client Profile notes.

Registration Wizard - Named Client

To register a named client (a user that provides you with a first or last name) please complete the mandatory fields below. By completing the fields below you have registered the user for the program with your Agency and created a client profile.

Privacy Statement for Clients

Has client accepted your agency's data confidentiality / privacy statement(s)? Yes

Registration Wizard - Named Client

To register a named client (a user that provides you with a first or last name) please complete the mandatory fields below. By completing the fields below you have registered the user for the program with your Agency and created a client profile.

Privacy Statement for Clients

Has client accepted your agency's data confidentiality / privacy statement(s)? Yes

Client Consents

Consent for Future Research/Consultation Yes

Has the client's consent to be contacted by your agency been given and documented? -- Not Set --

For display purposes and advertising does the client consent to having his/her picture taken? -- Not Set --

Client Information

First Name		Agency	ABC Demo Agency
Last Name	Florrick	Initial Destination	
Gender	-- Not Set --	Country of Origin	United States of America

5. How to connect two Individual Clients as part of the same Family (merge their Family Code)

You may have Clients registered individually in the OCMS who you want to record as part of the same family – for example, two people who individually receive services on their own but are married. Or, a client and their parent or grandparent. **One of these Clients must already have a Family Code assigned to them.**

Start on the **Client Profile** for one of the Family Members. Click **Find** to look up the family code in the other spousal or family member's profile.

Search the Family Member by filling in any parameter as shown. (Example at left shows a search by **First Name**.)

Check mark the correct one and click '**Select Family**'. They will now be listed with the same Family Code.

IF you are connecting individual clients who already have different Family Codes assigned to them, you will need to **choose** one Family Code to use for both.

The screenshot displays the OCASI Management System interface. The main window is titled "Edit a Client - Named Client" for "Nancy Drew". The "Family Code" field is empty and circled in blue. The "Find..." button is also circled in blue. A "Select Family" dialog box is open, showing a search for "Ned" with a table of results. The first result is selected with a checkmark, and the "Select Family" button is circled in blue.

#	Family Code	Client #	First Name	Last Name	Postal Code	Telephone
<input checked="" type="checkbox"/>	5084180	1372519	Ned	Nickerson	M1M1M1	(416) 123-4567

To Edit A Client Record

1. Search for the Client Record

Click **Find Client/Activity** on the left panel.
Enter a search parameter in any of the fields, and click **Search**. (Clicking just the Search button will bring up all results).

The search results will show up in the grid below.
Click **Profile** to open up the demographics.

To search for an **Anonymous Client** you must search by **Client Number**.

Additional Options [Show / Hide]

Profession Keyword / NOC code

Consent Required -- Not Set --

Language Spoken -- Not Set --

Country of Origin -- Not Set --

Gender -- Not Set --

Date of Birth -

Arrival Date -

Landing Date -

Imm. Status -- Not Set --

Imm. Class -- Not Set --

Employment Status -- Not Set --

Education Level -- Not Set --

Primary Worker

Created By

Updated By

Client Search - Find a Client in My Agency

Client Search allows you to find clients that have registered with your Agency. If this is a new client, it is recommended that you search for the client within your Agency and the Welcome Centre prior to creating a new client profile. This will ensure that the client has not been already registered with your Agency and that a single client profile is created for the client. You can search for a client by entering one or more of the specified fields below. The search results will provide you with a list of clients that meet your search criteria. Once you identify the client click on 'select', this will open the client profile and session history.

Client Type

Client Identifier -- Not Set --

Client #

First Name

Last Name

Family Code

Registration Date -

Registration Site

Telephone

Postal Code

Email

Comments

Additional Options [Show / Hide]

#	Client #	Name
Profile Dashboard	1333101	Peter Rabbits

2. Edit Client Information and Save

Edit client information in the record as needed, and remember to Save the record when finished.

To Add A Client Session

1. Find a Client Profile

First, locate the **Client Profile**. These steps are shown on the

2. Begin Session with Client

You can access a new session by clicking **Begin Session with Client** right at the end of the client profile.

Or select **Begin New Session** on the left panel.

This will take you to the **Create A New Session** page. (next page, below).

The screenshot shows a client profile page with a light blue header and footer. The main content area is white. At the top, there is a pagination bar with the text "No data to paginate" and navigation arrows. Below this is a "Show Deleted Documents" checkbox. The "Save As" dropdown is set to "Adobe PDF" and the "Print In" dropdown is set to "English". At the bottom, there are four buttons: "Save", "Print Registration Receipt", "Begin Session with Client" (circled in blue), and "My Prior Sessions with the Client".

The screenshot shows the OCMS User Dashboard. The left sidebar contains a "My Tasks" menu with the following items: Home, Find Client/Activity, Find Session, Register New Client, Begin New Session (circled in blue), Reporting, My Reports, Training, and FAQ. The main content area is titled "OCMS User Dashboard" and has three tabs: "My Incomplete Sessions", "Today's Updated Sessions" (selected), and "Today's Updated Clients". Below the tabs is a table with the following columns: "#", "Session #", "Service Date", "Session Type", and "Participants". The table is currently empty and contains the text "No sessions created or updated today."

3. Create A Session

Session Type = “Direct Service (Finance)”, make sure this is selected otherwise you won’t be able to access the FEPS forms.

Enter data as required, all **green** fields are mandatory.

Service Date should be adjusted to reflect **actual date** of the session, if the data entry is being done on a later day.

Delivery Method offers a drop-down menu for four options.

Type of Institution/Organization includes several different options, in case of a visit at your agency, or an accompaniment for Service somewhere else.

For **Delivery Language** and Staff Involved, first click the **[+]** to add, then fill in the item, **and click Update to save the field.**

Service Time must be at least 10 minutes.

The screenshot shows the 'Create a Session - New Session for a Client' form in the OCASI Client Management System. The form is for user May Wong at Prosper Canada. The session is being created for 2016/04/11 at site 99999997. The session type is 'Direct Service (Finance)' and the delivery method is 'In Person'. The type of institution is 'Community centre/neighbourhood house'. The interpreter is not present, and the service time is 1 hour and 30 minutes. The delivery language is English, and no staff are currently listed as involved. Callouts provide details for the dropdown menus for Delivery Method, Type of Institution / Organization, Delivery Language, and Staff Involved.

Upon saving the session, it will give you the access to add the FEPS Form (next page).

4. Adding FEPS Client Form

After clicking **Save Session** you will be shown the **Clients & Forms** section.

If you started from the Client Profile, the Client will already be listed on the Form.

If you have started a session from the Home Dashboard, you will first need to **Add** a Client to the Form.

Click **Add**, then search for and **Select Client**.

After you **Select Client** the client will be added to the Direct Service (Finance) form.

NOTE that the form record is currently in **PINK** because it is incomplete – the form has not yet been filled out with the session information.

Click **the [+]** sign to open the **Financial Services and Outcomes** form, and click **Edit** to enter the Services and Outcomes information. This will take you to the FEPS Services and Outcomes!

The screenshot displays the 'Clients & Forms' interface. At the top, there are fields for 'Interpreters (#)' (0) and 'Service Time' (1 Hours, 0 Minutes). Below this is a table with columns: 'Add', 'Client Id', 'Client Name', and 'Updated'. A 'Select Client(s)' dialog box is open, showing search filters and a list of clients. The client 'Alicia Florrick' (Client # 1372512) is selected. The bottom part of the screenshot shows the 'Financial Services and Outcomes' form in a pink state, with an 'Edit' button circled.

#	Client #	Family Code	First Name	Last Name	Postal Code	Telephone	Email
<input type="checkbox"/>	1372510		Peter	Rabbits	M1M1M1	(416) 123-4567	
<input type="checkbox"/>	1372511	5084176	Mary	Poppins	M1M1M1		
<input checked="" type="checkbox"/>	1372512	5084177	Alicia	Florrick	M4T1N5		
<input type="checkbox"/>	1372513	5084177	Peter	Florrick	M4T1N5		

Form Name	Form #	Status	Updated	Created
Financial Services and Outcomes Form	1230107		2016/04/26	2016/04/26

Financial Services and Outcomes Form

Agency Program: FEPS

Service Funder by: <Select a Funder>
scroll to Province of Ontario and look for
Ministry of Community and Social
Services, OR directly input the number
000013

Referred by: Select the referral source
or select Not Referred

Is service taking place in: This aims to
show if the session is an accompaniment
or not

**Is this a follow up done on behalf of
client:** Enter **Yes** if this is a record of
time spent on research done on behalf
of client without the client present. **You**
**are not required to enter Staging,
Services nor Outcomes data for a follow-
up.** ("Add Services" and "Add
Outcomes" may be checked, to bring up Services and Outcomes menus if needed, but
this is not required.)

Enter **No** if this is a session with client and continue to enter all necessary data.

Add Services / Add Outcomes:

Check the box 'Add Services' to bring up the Services form – the Financial Services areas will automatically populate.

Checking the box 'Add Outcomes' will also bring up the Outcomes form, immediately after the Services form, in the same screen.

OCMS Settlement Program - Financial Services and Outcomes Form [890636/1230107] - Alicia Florrick [1372512]

Program: OCMS Settlement Program
Agency: Prosper Canada
Name: Alicia Florrick [1372512]
Session / Form: 890636 / 1230107
Service End Date: 2016/04/26
Form is Private:

Financial Services and Outcomes Form

Agency Program: FEPS
Service Funded By: Select a Funder
Referred By: Family / friends
Is service taking place in: Community Agency office
Is this a follow up done on behalf of client (without client presence?): No
Client Stage: Stabilizing

Add Services (un-checking will delete entered data)
 Add Outcomes (un-checking will delete entered data)

Select a Funder

Filter

- Settlement Program Funding Streams (99999999)
 - * Not Applicable (99999999)
 - Province of Ontario
 - Other Ministries
 - Ministry of Community and Social Services (000013)

Financial Services Provided

For a follow-up type of session, Client Stage (Stabilizing, Coping, and Sustaining) is not offered.

Add Services

Click [+] sign to enter the service details for each service area. Indicate whether **Info** (information given, no direct action or support) or an **Action** (active case support on behalf of the FEPS case worker) was performed. All also include a **Comments** option to give more detail.

Indicate the **Description** using the drop-down menu for that Financial Service.

Financial Services include:

- Assets Building: CLB, RESP, savings plan, etc.
- Financial Services: Account set up, resolving bank issue, etc.
- Benefits/Income Support: GST, ODSP, OW, etc.
- Money Management: Budgeting, credit report, bankruptcy, work with collection agency to resolve issue, etc.
- Consumer Protection: Phone, utilities, other
- Income Tax: Tax filing, work with CRA, T1 adjustment, etc.
- Referral: Includes community agency, settlement services, debt management, food bank, housing, etc.
- Secured or Prepaid Credit Card
- Other Services: Self-employment, employment, ID, other

There is a **Comments** space for other information that may be useful for the case worker to document. **Make sure to click Update for each row after you update the information or it will not be saved!**

The screenshot displays the 'Financial Services and Outcomes Form'. At the top right is a 'Tasks & Referrals...' button. Below the title, there are three dropdown menus: 'Is service taking place in' (Community Agency office), 'Is this a follow up done on behalf of client (without client presence)?' (No), and 'Client Stage' (Stabilizing). There are two checkboxes: 'Add Services (un-checking will delete entered data)' which is checked, and 'Add Outcomes (un-checking will delete entered data)' which is unchecked. The 'Financial Services Provided' section contains a table with a header row: '[+]', 'Description', 'Info', 'Action', and 'Comments'. Below the header, it says 'No data to display'. A blue arrow points from the '[+]' icon to a dropdown menu titled 'Assets Building'. This menu is open, showing a list of service types: CLB, CESH, RESP, and RDSP. At the bottom of the menu are 'Update' and 'Cancel' buttons. Below the menu, the table header is visible again with 'Description', 'Info', and 'Action' columns.

5. Financial Outcomes Provided

Click **[+]** sign to enter the service details for each service area. Indicate Yes/No for **New** and if **Direct Deposit** banking is established for that outcome.

A **New** benefit is counted as new if it is:

- new since the person entered FEPS, or
- a benefit that has been reinstated

Select **Yes** for **Direct Deposit** any time a FEPS worker helps set up direct deposit for income benefit if:

- It is new direct deposit setup since the person entered FEPS, or
- It is a direct deposit setup that has been reinstated.

Indicate the **Description** using the drop-down menu for that Financial Outcome.

Financial Outcomes include:

- Income Tax Secured
 - Input the Tax **Year, Amount, New (y/n), and Direct Deposit**
 - **Income** indicates the amount of Income declared on the tax return for that year (Line 150), OR an estimate of income as per Line 150 if they were to file taxes.
 - Includes Tax refund, WITB, GST, OTB, OEPTC, etc. **Tax Refund** must include a \$\$ amount, even if 0.
- Other Benefits Secured: Includes RESP, OAS, CPP, EI, CLB, etc.
 - Input the Tax **Year, Amount, New (y/n), and Direct Deposit**
 - For a NEW application the case worker does with the applicant
- T1 Adjustment: Disability, Tuition and Education, Rent, Other
- Other Outcomes: Includes Resolving CRA issue, improved housing, follow-up plan from last visit, etc.
 - This is the key opportunity to record personal life change aspects for the participant

Make sure to click Update for each row upon completion of data entry!

Financial Outcomes

Income Tax Secured

[+]	Year	Description	Amount (\$)	New	Direct Deposit	Comments
Update Cancel	2015	Tax Refund	1500	Yes	Yes	
Edit Delete	2015	Income	20000			

Page 1 of 1 (1 items) < [1] >

Other Benefits Secured

[+]	Description	Amount (\$)	New	Direct Deposit	Comments
No data to display					

No data to paginate < [1] >

Other Benefits Secured

[+]	Description	Amount (\$)	New	Direct Deposit	Comments
Update Cancel					
	RESP				
	OAS				
	Pensions				
	CPP				
	EI				
	CLB				
	CES				

Other Outcomes

To add “Other Outcomes”, click the [+] symbol to reveal the menu of “Description” options. Select from the menu, add **Comment**, and click “Update.”

Note that only ONE of each option may be selected for the same session.

For example, “Resolved CRA issue(s)” and “Reduced debt load” may each be selected once, but “Reduced debt load” may not be selected twice. If the same selection is entered, the second one will not be saved upon clicking “Update.”

Financial Services and Outcomes Form

No data to paginate < >

Other Outcomes

[+]	Description	Comments
Update Cancel	<input type="text"/>	
	Resolved CRA issue(s)	
	Reduced debt load	
	Reduced service fees	
No data to paginate	Improved housing situation	
Comments for Outcomes	Independent self-advocacy	
	Follow up plan from last visit	
	Other	

6. Comments

You can enter narrative **Comment** notes at the end of the Services or Outcomes sections.

These can be useful for a case worker to note things to follow up on, steps taken, other information that would be good to identify for a different case worker reviewing the file.

7. Save to Finish

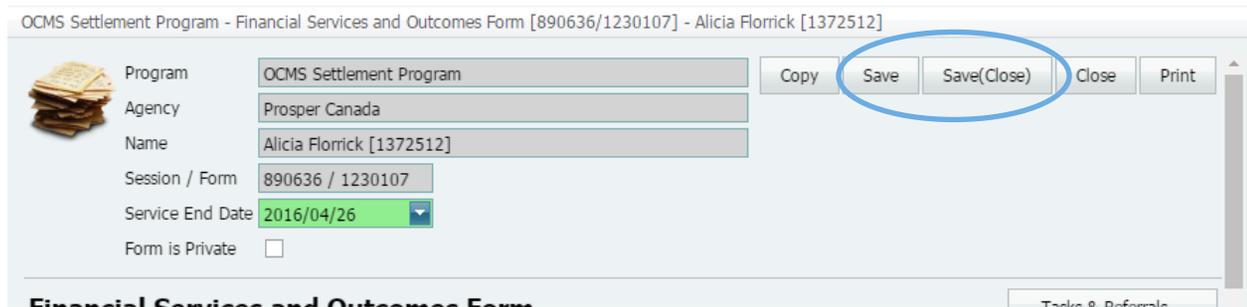
There are TWO “Save” steps to completely save a Session in the OCMS.

Remember to Click Save at the Top of the Screen to complete the Session record. This saves the Form information with all the Services and Outcomes.



Referral

[+]	Description	Info	Action	Comments
Update Cancel	Debt management	Yes		
No data to paginate < >				
Comments for Services	Client has debt issues but does not want to talk about it. Referred to debt counselor.			
Comments				



OCMS Settlement Program - Financial Services and Outcomes Form [890636/1230107] - Alicia Florrick [1372512]

	Program	OCMS Settlement Program	Copy	Save	Save(Close)	Close	Print
	Agency	Prosper Canada					
	Name	Alicia Florrick [1372512]					
	Session / Form	890636 / 1230107					
	Service End Date	2016/04/26					
	Form is Private	<input type="checkbox"/>					

Financial Services and Outcomes Form

When you save your Form record, you will receive a pop up prompting you to create Tasks and Referrals, this is optional and not required by FEPS.

If you have Saved the Session form correctly, the Client Form section in the Edit A Client Session Page will now be **GREEN**, instead of pink:

Clients & Forms

	Client Id	Client Name	Updated			
Add	1372514	Schmidt, Kimmy	2016/05/25			
Remove						
Add Form	Form Name	Form #	Status	Updated	Created	
Delete Edit	Financial Services and Outcomes Form	1230161	Completed	2016/05/25	2016/05/25	

To completely save a session you must also Save at the bottom of the Edit A Client Session page, the same page you added the client form:

Delivery Language [Add Language](#) Delivery Language

[Remove](#) English

Staff Involved

[Edit](#) Staff Name

Test Account #3

Session Notes

Supporting Documents [Attach Document](#)

Name	Private	Type	Size	User	Date
No data to display					

No data to paginate < >

Show Deleted Documents

[Save Session](#) [Delete Session](#)

Deactivating a Client Profile

1. First, ensure that all **Client Sessions have been deleted** before you deactivate the client.
2. From the **Client Profile** page, scroll down to the **Active** checkbox, below “Re-entry Date”.
3. Un-check the **Active** box and then **Save** the profile.
4. At this time the Client Profile no longer exists in the OCMS, and would need to be re-created from scratch if the client returns or needs to be added back into the system.



The screenshot shows a form with the following fields:

Landing Date	-- Not Set --	X	▼
Arrival Date	2010/01	X	▼
Re-entry Date	-- Not Set --	X	▼
Active	<input type="checkbox"/>		

A mouse cursor is pointing at the checkbox in the Active row.

For more information

Visit the OCASI Client Management System **Knowledgebase** at: <http://ocms-support.ca/knowledgebase.php>

Brief Glossary of Benefits/Financial Services listed in OCMS Services and Outcomes

Allowance for Survivor

The Allowance for the Survivor is a benefit available to people who have a low income, who are living in Canada, and whose spouse or common-law partner is deceased.

CDSB (Canada Disability Savings Bond) and CDSG (Canada Disability Savings Grant)

If you have a Registered Disability Savings Plan (RDSP), you can apply for a Canada Disability Savings Grant or Bond. The Canada Disability Savings Grant is a matching grant of up to 300 percent, depending on family income and contribution amount. The maximum Grant amount is \$3,500 per year, with a limit of \$70,000 over your lifetime.

CESG (Canada Education Savings Grant)

The CESG is money that the Government of Canada will add to your child's savings in an RESP.

CLB (Canada Learning Bond)

The Canada Learning Bond (CLB) is money that the Government of Canada deposits directly into a child's Registered Education Savings Plan (RESP) account to help parents get a head start on saving for their child's education after high school.

CPP (Canada Pension Plan)

The CPP retirement pension provides a monthly benefit to eligible applicants.

CPP Disability

The CPP disability benefit is a taxable monthly payment that is available to people who have contributed to the CPP and who are not able to work

regularly at any job because of a disability. This benefit is not designed to pay for such things as medications and assistive devices.

Canada Child Benefit

The CCB is a tax-free monthly payment made to eligible families to help them with the cost of raising children under 18 years of age. The CCB might include the child disability benefit and any related provincial and territorial programs. This replaces the Canada Child Tax Benefit (CCTB) as of July 1, 2016. Ontario Child Benefit (OCB) is paid with the CCB in a single monthly payment.

GIS (Guaranteed Income Supplement)

The GIS provides a monthly non-taxable benefit to Old Age Security recipients who have a low income and are living in Canada.

GAINS

GAINS ensures a guaranteed minimum income for Ontario seniors by providing monthly payments to qualifying pensioners. The monthly GAINS payments are on top of the federal OAS pension and the GIS payments you may receive.

GST/HST credit

The GST/HST credit is a tax-free quarterly payment that helps individuals and families with low or modest incomes offset all or part of the GST or HST that they pay. When you file your return, the Canadian Revenue Agency (CRA) will determine eligibility and will advise those who are eligible to receive the credit.

EI (Employment Insurance)

EI provides temporary financial assistance to unemployed Canadians who have lost their job through no fault of their own, while they look for work or upgrade their skills. May also provide for Compassionate Care Benefits, Sickness Benefits, or Family Supplement.

LEAP (Low-Income Energy Assistance Program)

LEAP is administered by the Ontario Energy Board for assistance with electricity bills. In order to qualify, you must have a family income that falls below a certain limit, which depends on income level and number of people in the household. For example, a household with 2 people is eligible if they have an after-tax income of less than \$28,000 (as of 2016).

OAS (Old Age Security)

The OAS pension is a monthly payment available to most people 65 years of age and older who meet the Canadian legal status and residence requirements.

OTB (Ontario Trillium Benefits)

The OTB helps people pay for energy costs, and provides relief for sales and property tax. The Ontario Trillium Benefit combines the following: Ontario Sales Tax Credit, Ontario Energy and Property Tax Credit and Northern Ontario Energy Credit. You need to be eligible for at least one of the above-mentioned credits to receive the Ontario Trillium Benefit.

OSHPTG (Ontario Senior Homeowners' Property Tax Grant)

This grant helps seniors with the cost of their property taxes, up to \$500 per year. You may qualify for the grant if you or your spouse/common-law partner paid Ontario property tax in the previous year and meet the income requirements.

OSTC (Ontario Sales Tax Credit)

This credit helps low- to moderate-income individuals with the sales tax they pay. The credit is part of the Ontario Trillium Benefit.

OEPTC (Ontario Energy Property Tax Credit)

This credit helps low- to moderate-income individuals with property taxes and the sales tax on energy. The credit is part of the Ontario Trillium Benefit.

ODSP (Ontario Disability Support Program)

Administered by the Ministry of Community and Social Services (MCSS), ODSP offers financial and employment support to those with disabilities who need help with their living expenses

OESP (Ontario Electricity Support Program)

OESP is administered by the Ontario Energy Board. Low-income households may apply for a reduction on their electricity bill through a monthly credit on their bill. This depends on the number of people in the home and the combined household income.

OW (Ontario Works)

Administered by the Ministry of Community and Social Services (MCSS), OW helps people who are in financial need. It offers two types of assistance: 1. Financial assistance, 2. Employment assistance

OSAP (Ontario Student Assistance Program)

OSAP offers both grants (do not need to be repaid) and loans (need to be repaid). This is provided by both Ontario and federal government funding. Students can apply online or by paper application for full-time or part-time studies.

OSHPTG (Ontario Senior Homeowners' Property Tax Grant)

This grant helps seniors with the cost of their property taxes, up to \$500 per year. You may qualify for the grant if you or your spouse/common-law partner paid Ontario property tax in the previous year and meet the income requirements.

RDSP (Registered Disability Savings Program)

The RDSP is a long-term savings plan to help Canadians with disabilities and their families save for the future. If you have an RDSP, you may also be eligible for grants and bonds to help with your long-term savings. Contributions are tax deductible and are not included in income when paid out of an RDSP.

RESP (Registered Education Savings Plan)

An RESP is an education savings account that is registered with the Government of Canada. With RESP, you may be able to receive other

grants and subsidies, such as the Canada Learning Bond; Basic and Additional Canada Education Savings Grant. There are three types of plans that can be opened where the beneficiaries can be children (related or not related), yourself or for another adult.

TFSA (Tax Free Savings Account)

A kind of bank account you can set up which allows \$5500 contribution per year as of 2016. You do not need to pay tax on the interest on your savings in this account.

WITB (Working Income Tax Benefit)

The WITB is a refundable tax credit intended to provide tax relief for eligible working low-income individuals and families who are already in the workforce and to encourage other Canadians to enter the workforce. The WITB consists of a basic amount and a disability supplement.

OCMS: Required data fields when entering client information

The OCMS is a data collection tool used by many different agencies, and so has the capacity to collect a wide variety of client (program participants) information. These are the data fields required by the OCMS and by FEPS program specifically. Note: If a data field required by the OCMS is left empty, the system will show a warning indicator next to that field, so that it can be filled in before allowing the Client Profile or Session to be saved in the system.

Data field	Required by OCMS?	Required for FEPS program?	Description / Clarification
Client Profile (Named Client)			
Accept privacy statement (yes/no)	✓		This can be done verbally or in writing.
Consent (yes/no) for future consultation or research	✓		Through March 31 st , 2017, this question is for collecting a pool of potential interviewees for the external evaluator, Goss Gilroy Inc. After FEPS program funding, this question can be used internally in agency.
First Name	✓		
Last Name	✓		
Gender	✓		Options are: Male, Female or Other
Postal Code	✓		If you do not know postal code for participant, use the one for your agency office.
Date of Birth		✓	
Immigration Status		✓	For those born in Canada, indicate “citizen by birth” or “citizen (Aboriginal)”. “Unknown” is an option.
Arrival Date		✓	This may be estimated, if the participant doesn’t remember their exact arrival date.
Agency		✓	
Country of Origin		✓	
Aboriginal Status		✓	Should ONLY be filled in for those who identify as a member of one of Canada’s Aboriginal groups.
Preferred Official Language		✓	
Date of First Agency Visit in Program	✓		The date they first came to FEPS.
New/Returning Status of Client	✓		Returning Client = If their first visit to FEPS was before entering their profile into OCMS. New Client = If their first visit to FEPS is the day they are entered into OCMS.
Number of Prior Visits to FEPS		✓	For a New Client, “Prior Visits” = 0. For a Returning Client, “Prior Visits” = number of previous one-on-one FEPS sessions recorded.
Telephone Number		✓	

Street Address		✓	
City		✓	
Province		✓	
Country		✓	
Language		✓	Only needs to be recorded if you wish to record a language for the participant in addition to their preferred official language.
Registration Date	✓		
Registration Site	✓	✓	
Referral source	✓	✓	
Family Income		✓	Family income: Gross family income in the range that best describes the family's income range as per line 150 of most recent tax return and benefit return.
Income Support		✓	The participant's source(s) of income
Children's information		✓	Leave this section blank if participant has no children, or if this information is unknown
Client Profile (Anonymous Client)			
Gender	✓		Options are: Male, Female or Other
Immigration Status	✓		For those born in Canada, indicate "citizen by birth" or "citizen (Aboriginal)". "Unknown" is an option.
Registration Date	✓		
Registration Site	✓		
Client Session (Including FEPS Direct Services & Outcomes)			
Session Type (Direct Service Finance)	✓		This session type MUST be selected otherwise FEPS program forms will not be accessible.
Service Date	✓		Should reflect ACTUAL date of the session, not the date of data entry.
Site	✓		
Delivery Method	✓		Options are: In person, by telephone, by email, other.
Type of Institution	✓		Offers many options, including: community centre, public space, employment agency, and others.
Service time (min 10 min)	✓		
Delivery language	✓		
Staff involved	✓		
Agency program	✓		Indicate FEPS
Service funder	✓		Indicate MCSS

Referral source	✓		This is also recorded in the Service form, but should be recorded in the Profile as well
Service taking place in	✓		This aims to show if the session is an accompaniment or not.
Is this a follow up session on behalf of client? (Yes/No)	✓		For participant support, research, work done in between meetings with participant.
Client Stage	✓		Stabilizing, Coping, or Sustaining. This is at the discretion of the FEPS case worker to assign the client stage.