Prosper Canada
CENTRE FOR FINANCIAL LITERACY

FEPS OCMS: User Guide

Version February 8, 2017

FEPS OCMS: User Guide

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

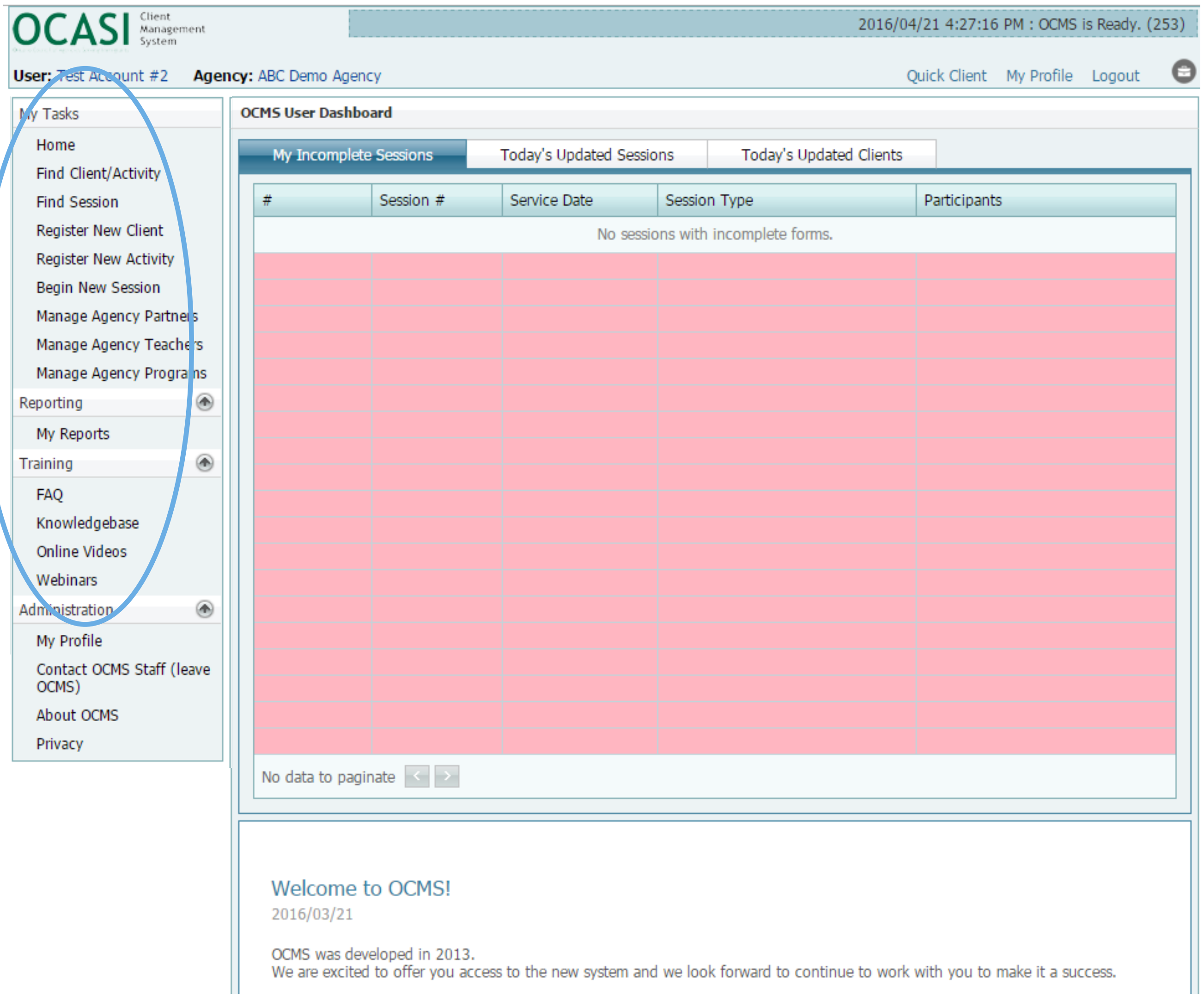
- Understanding the Interface
- Workflow: "Cheat Sheet" Sequence of Steps
- Add a New Client
- Edit a Client Record
- Adding a New Session
- Glossary of Benefits/Financial Outcomes

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**.



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 <u>Gender</u> (Male/Female/Other), <u>Immigration Status</u> (may select Unknown), <u>Registration Date</u>, and <u>Registration Site</u>.
3. Enter **client information** into the Registration form.
    a. <u>Required Client Information (for FEPS):</u> 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. <u>Required Client/Agency History Information (for FEPS):</u> 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. <u>Required Contact Information (for FEPS):</u> 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.

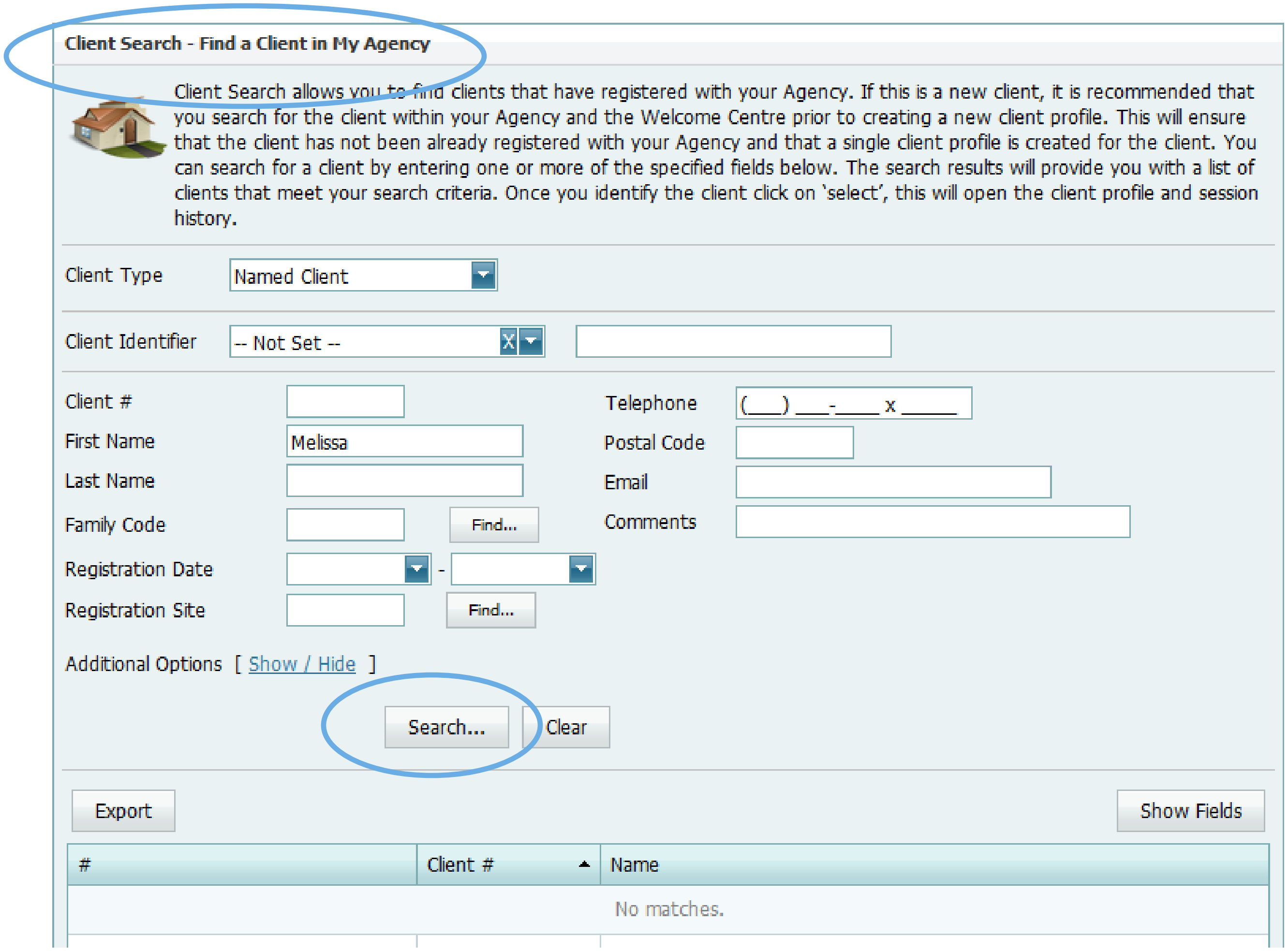
To Edit a Client Record

1. Find a **Client Record**
    a. Can search <u>by any identifying nam</u>e, 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



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

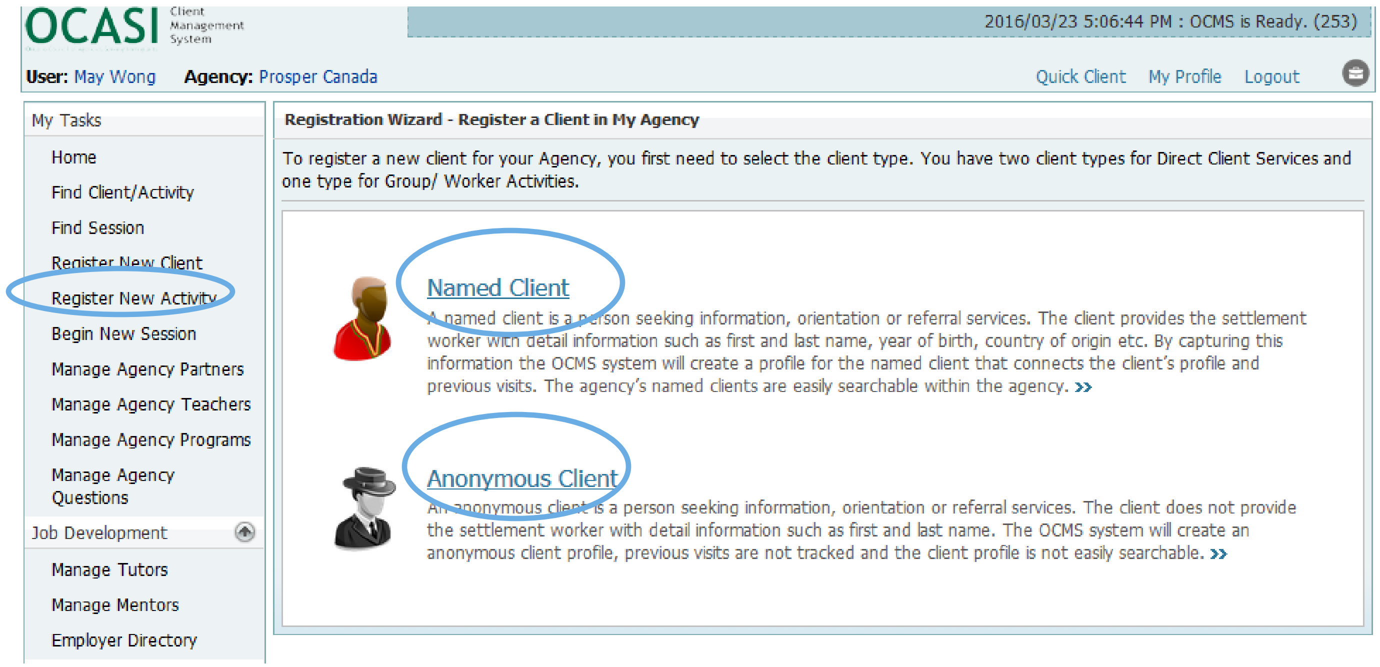
It is a prerequisite to accept the **Privacy Statement** for client to be recorded. Non acceptance will be treated as **Anonymous Client**. <u>This can be done verbally or in writing.</u>

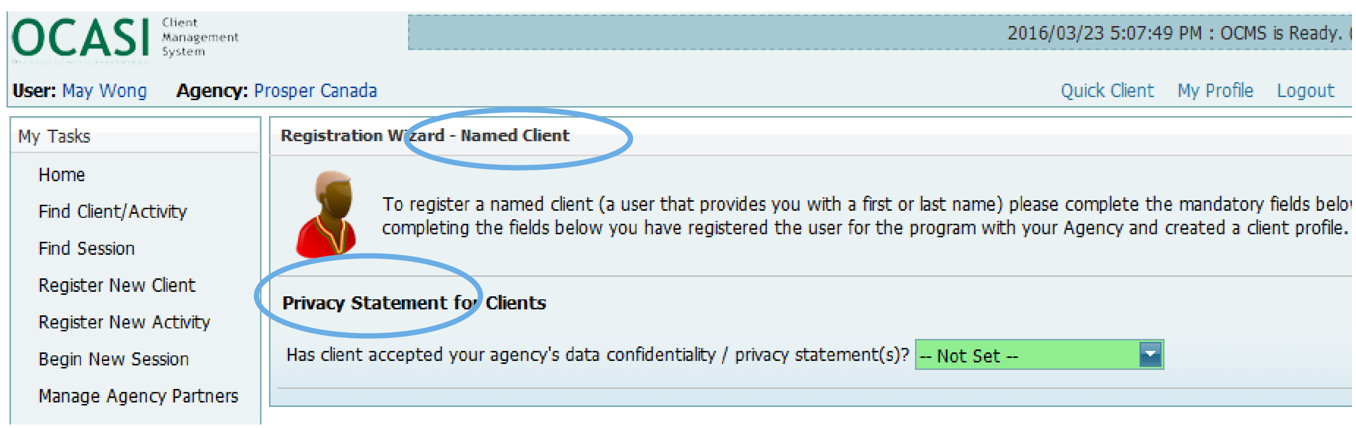
After the statement is accepted, the demographic details screen will load for data entry.

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

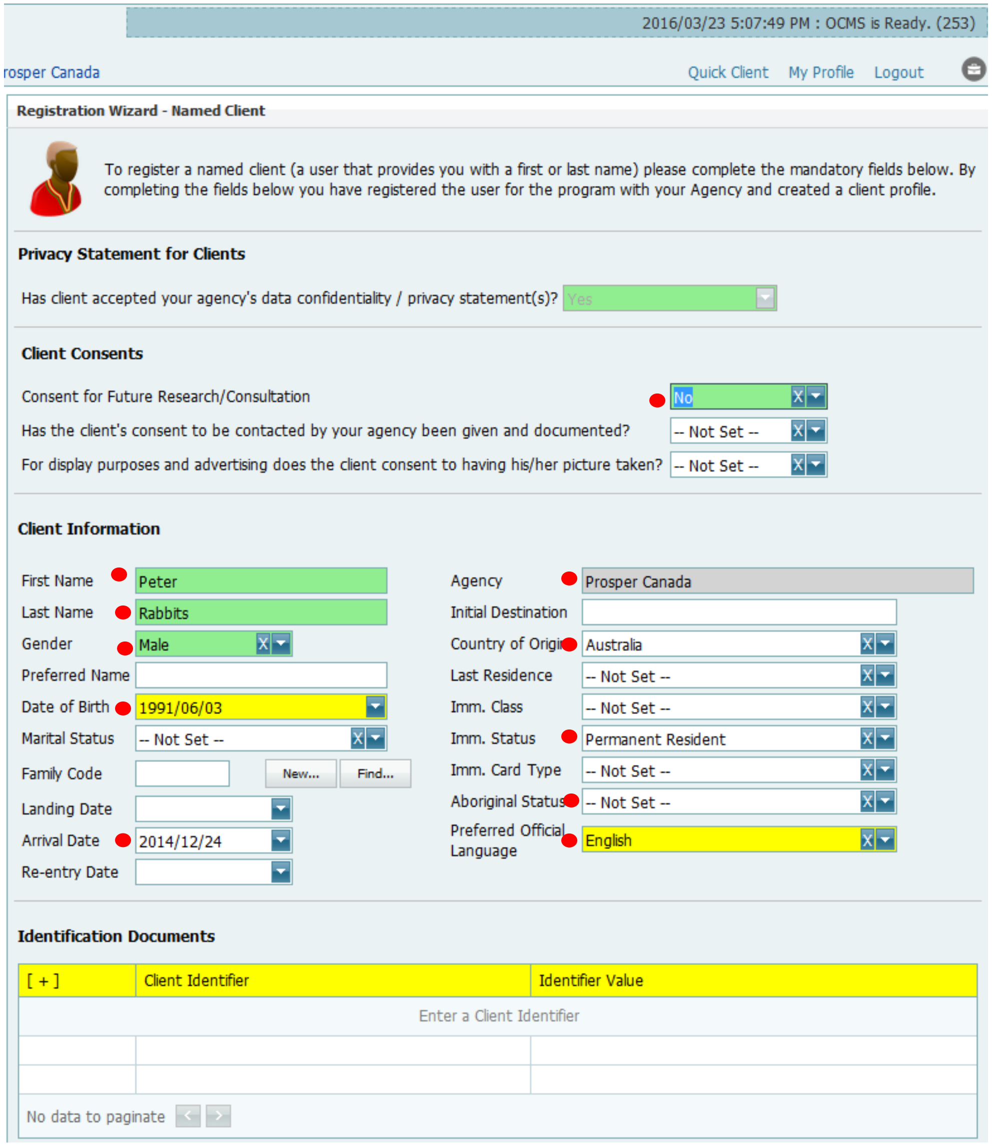
Any field in <u>green</u> is mandatory and must be answered in order to save a record.

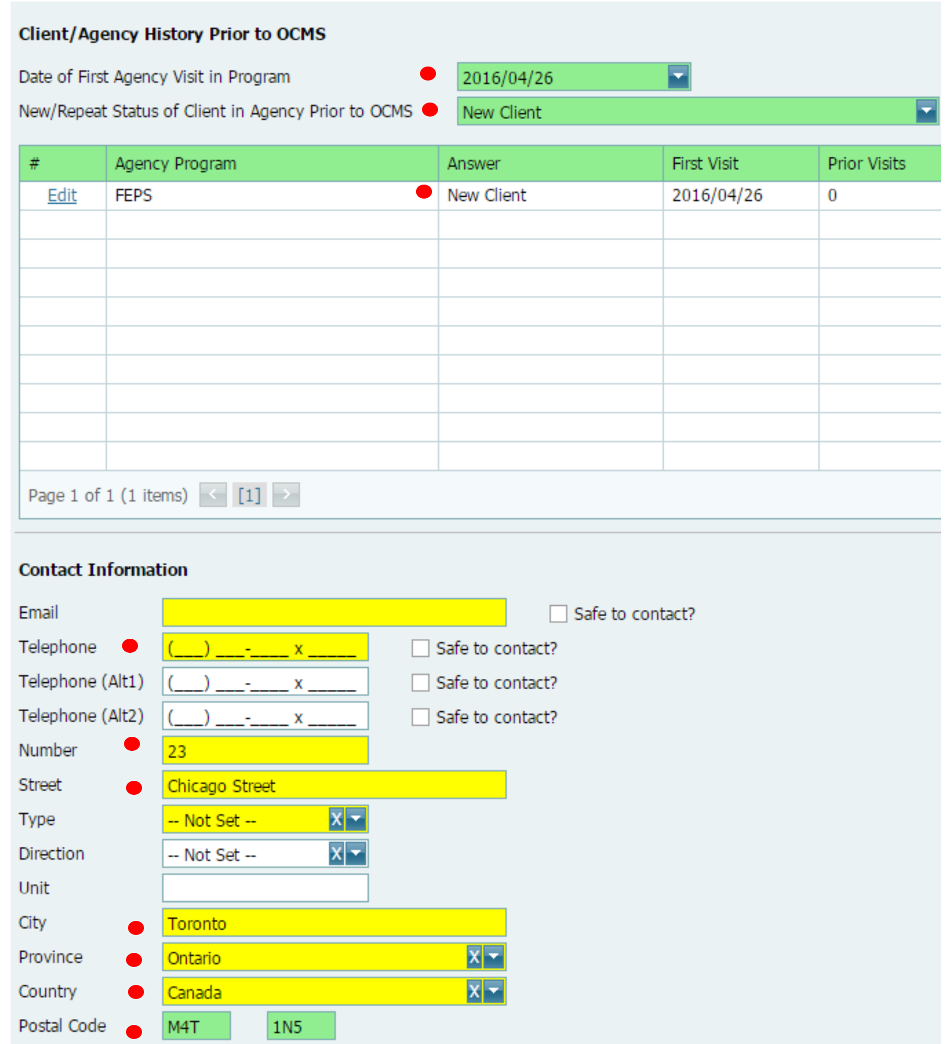
Any field in <u>yellow</u> relates to iCare which may or may not applicable to FEPS. Yellow fields are not mandatory for the OCMS itself.





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





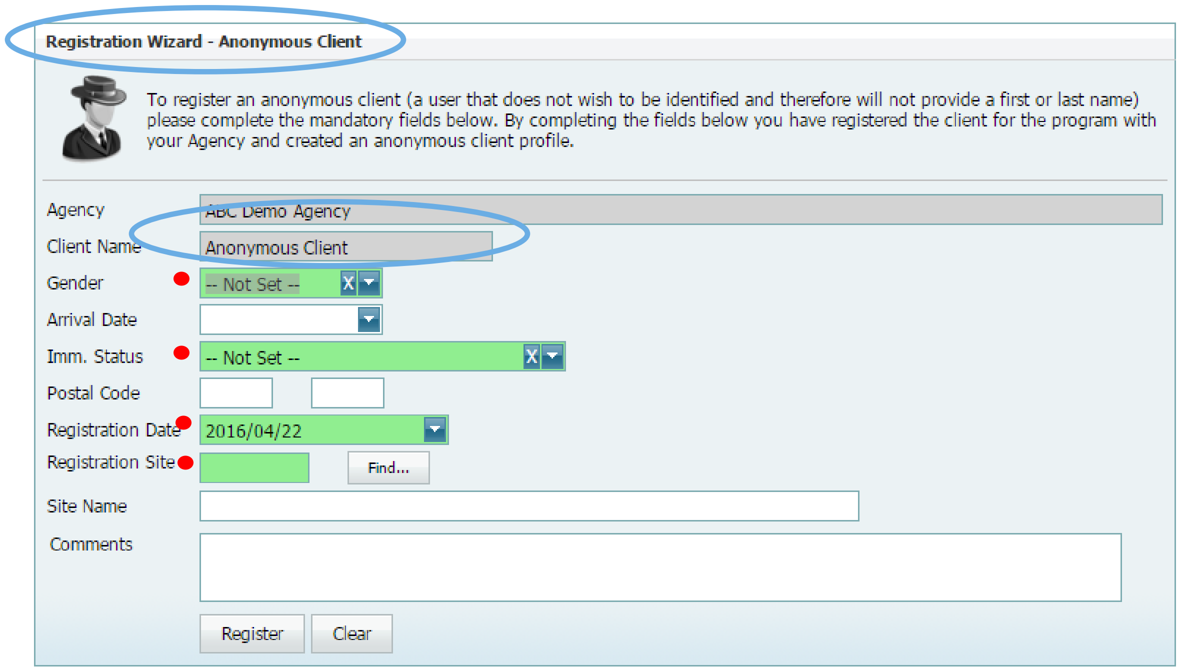
Consent for Future Research/Consultation = For the duration of FEPS program funding through MCSS (i.e. March 31st, 2017), this question is for collecting a pool of potential interviewees for the external evaluator, Goss Gilroy Inc. After FEPS program funding, this question can be used internally in agency.

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**.

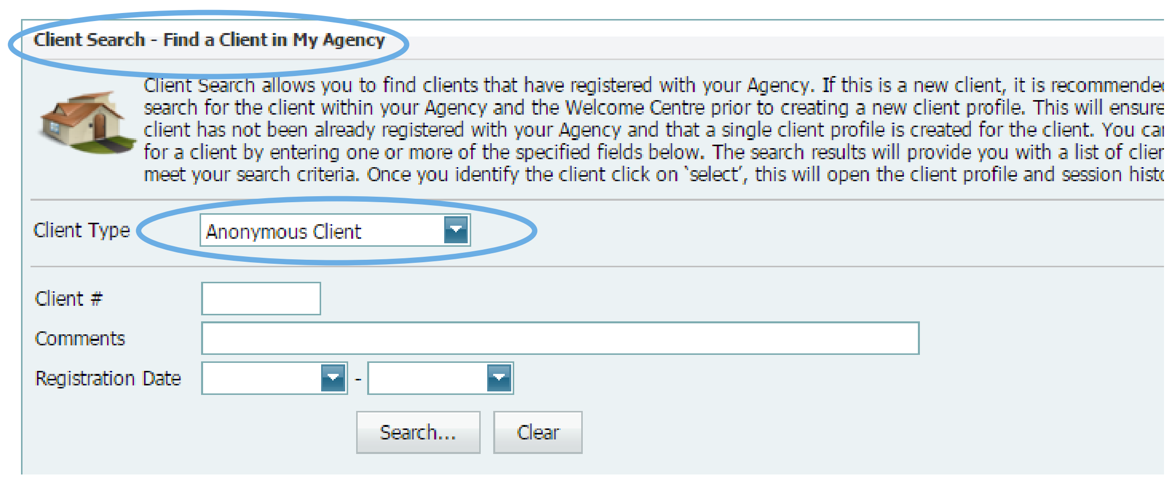
There are still four <u>required fields</u> for anonymous clients:

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



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

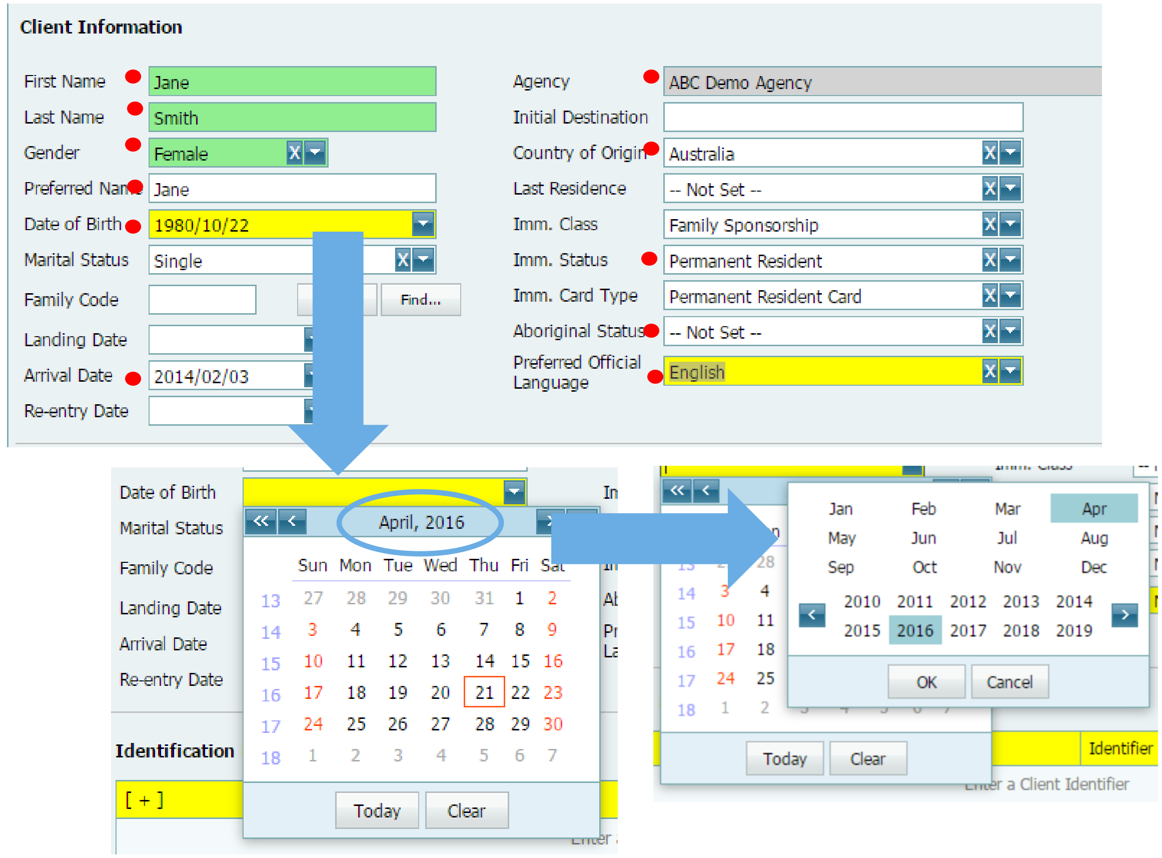
<u>An Anonymous Client cannot be changed into a Named Client later on, in the OCMS.</u>



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.

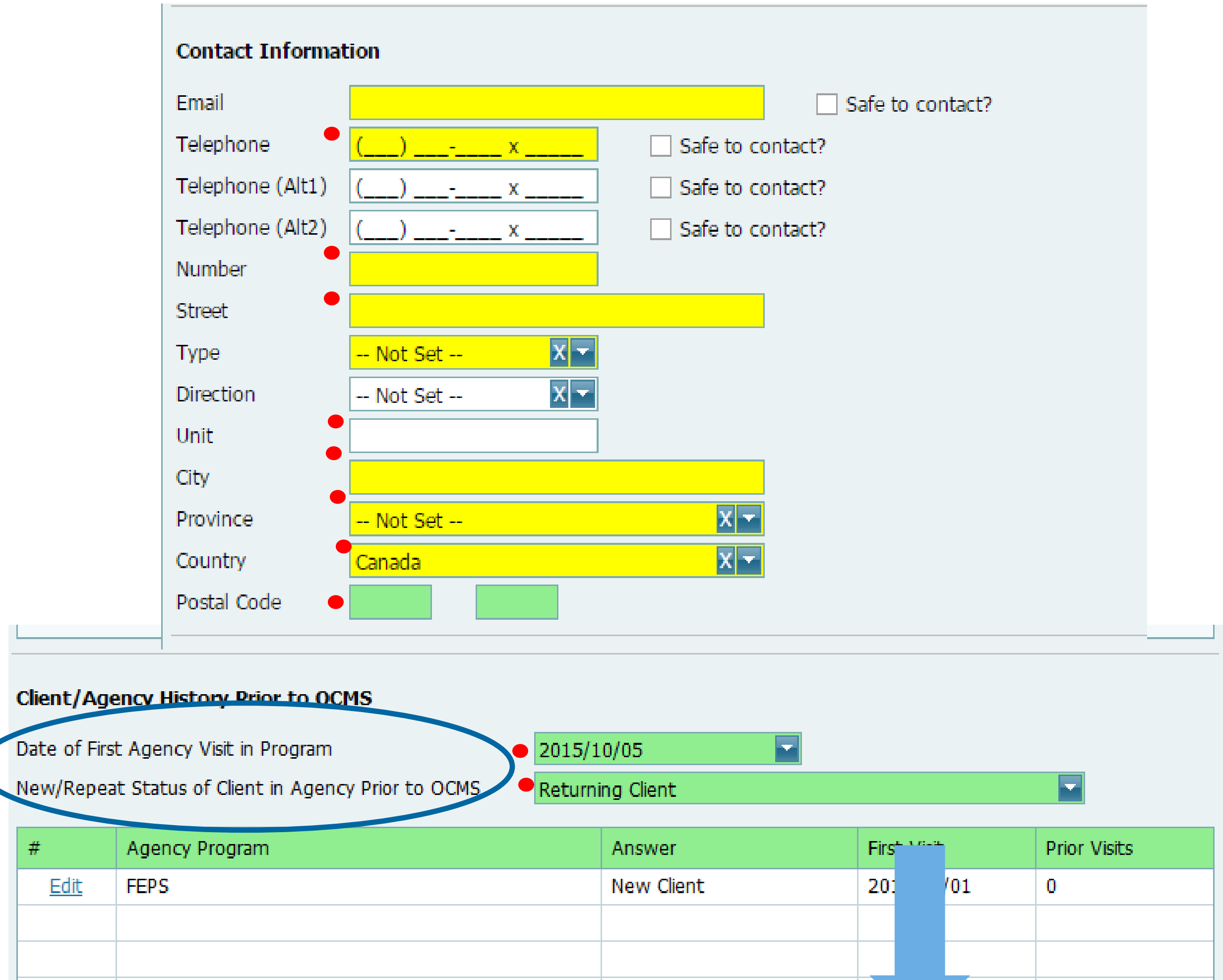
Dates can also be typed in manually, skipping the drop-down menu.

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

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.

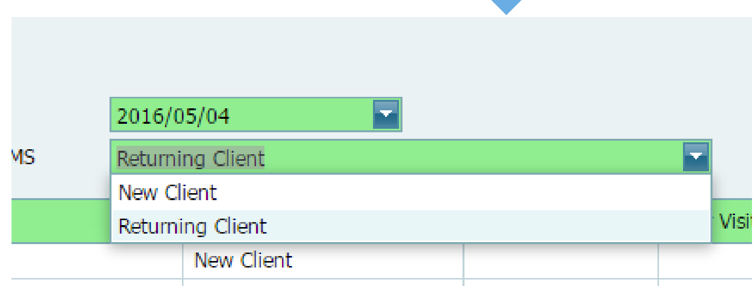
<u>**Safe to Contact?** = If this box is left blank, it will be interpreted as "no."</u>



Client/Agency History Prior to OCMS

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

New/Repeat Status of Client in Agency Prior to OCMS (drop down menu) = If their first visit to FEPS was <u>before</u> 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.**

<u>For a **Returning Client, "Prior Visits"** = number of previous one-on-one problem solving FEPS sessions recorded.</u>

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

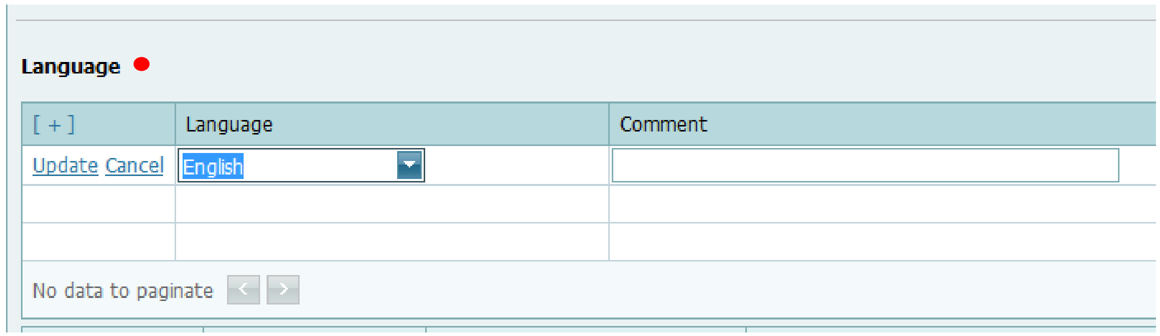
first came to FEPS), New/Repeat Status of Client Prior to OCMS (New or Returning Client)
To add this information to the Agency Program menu, click the [+] sign, then input the **New/Returning Client, First Visit, and Prior Visits** information. **First Visit** = first FEPS one-on-one problem solving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

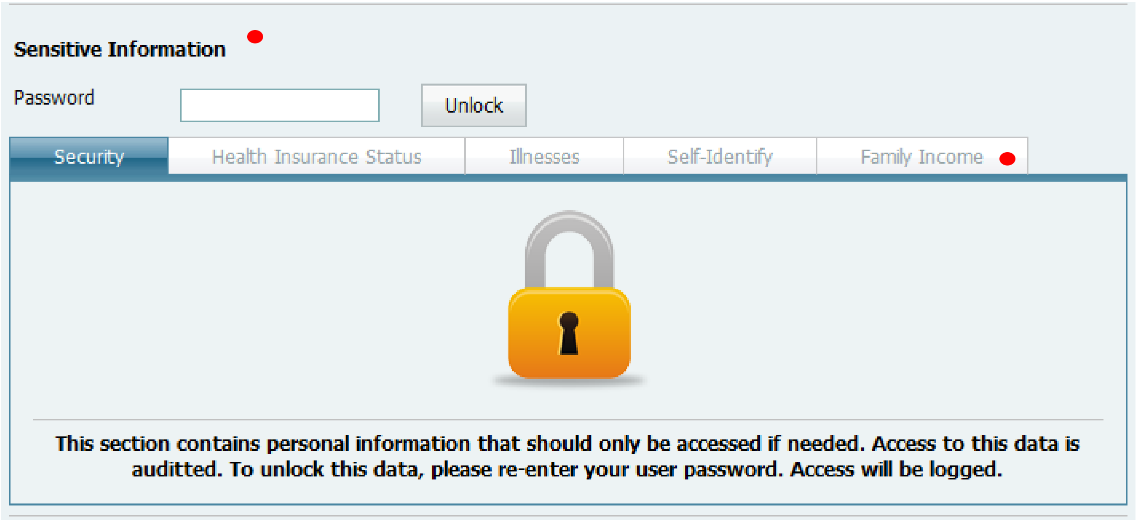
To add this information to the Agency Program menu, click the [+] sign, then input the **Language** information in the drop-down menu, and any **Comment** in the open field.



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

Sensitive Information

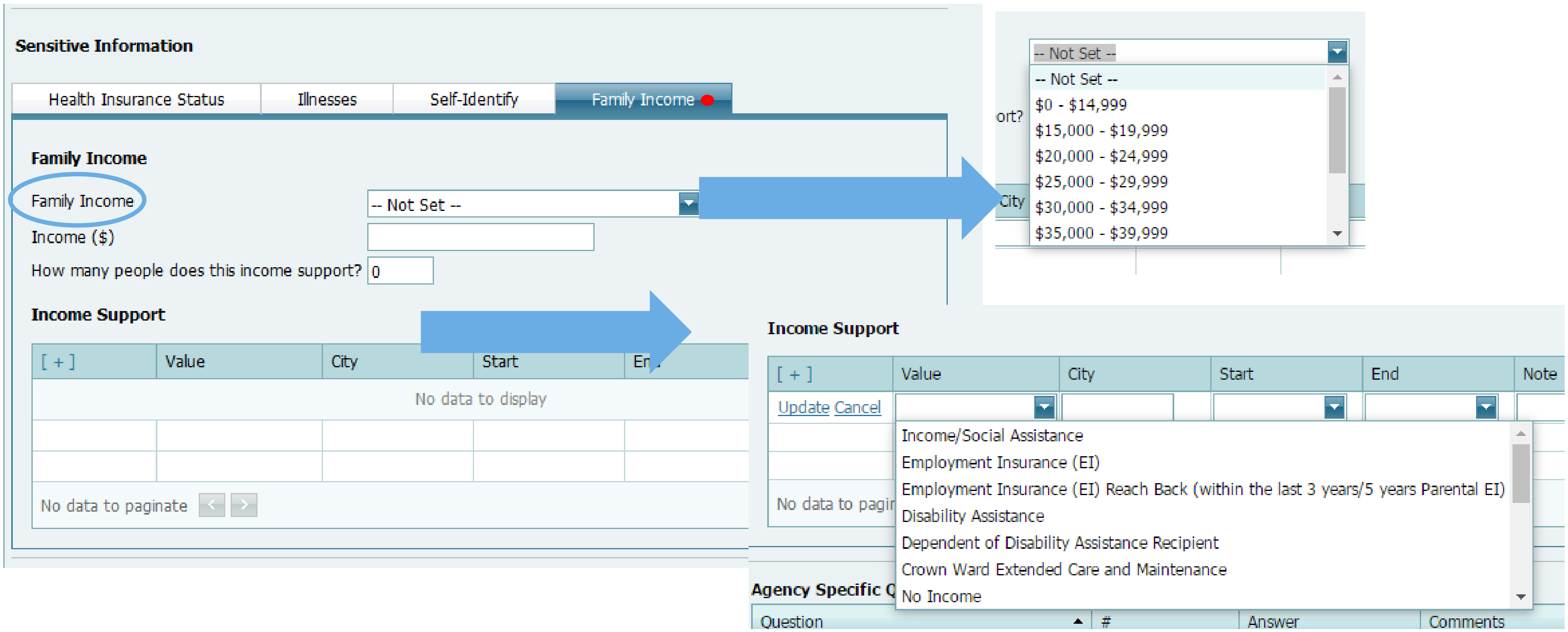
FEPS records information about **finances and income**. This information is deemed **Sensitive Information** in the OCMS client information, and must be accessed by password. Input your user password to access the **Family Income** menu.



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.)

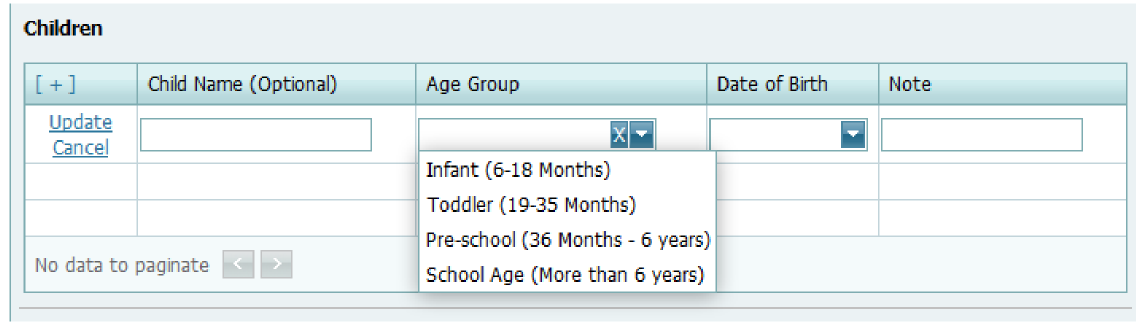


Family Income = Gross family income in the range that best describes the family's income range as per line 150 of most recent tax return and benefit return.

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.

<u>Leave this section blank if participant has no children, or if this information is unknown.</u>



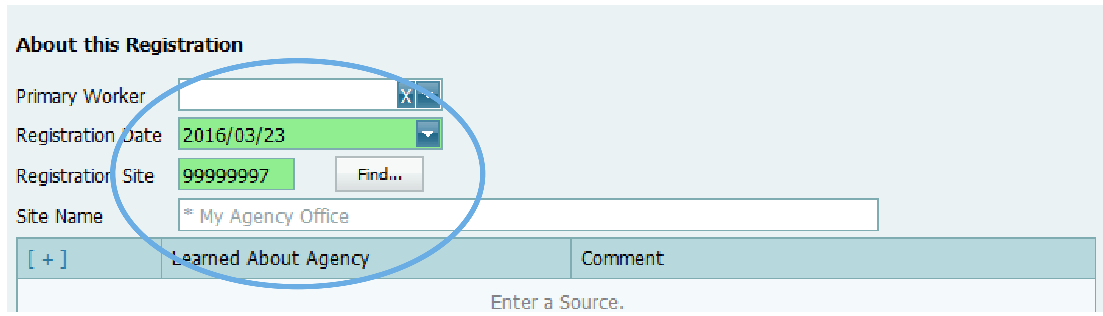
Completing the Registration

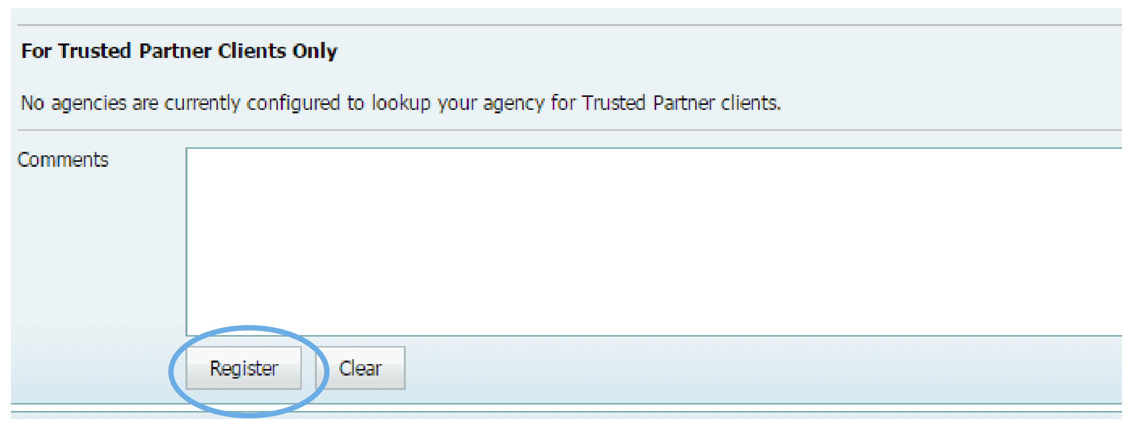
Registration Date and **Registration Site** are required fields. These must be completed before the registration can be finalized.

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

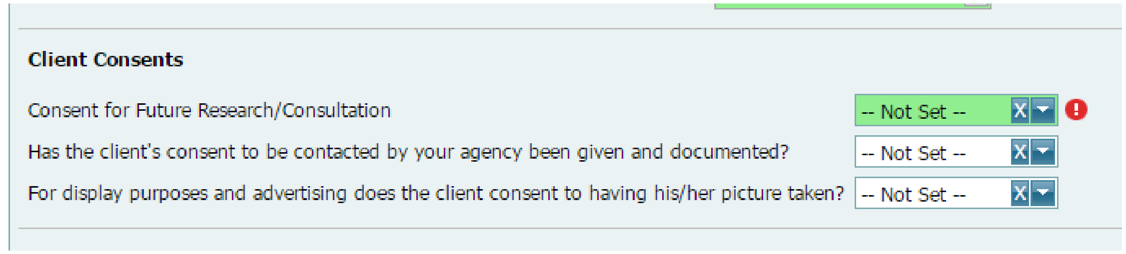
If you have missed any required fields, these will be shown to you as warnings before you can complete the registration (see page above).

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.

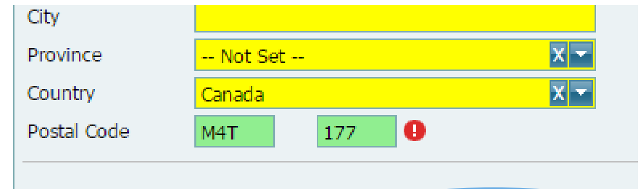




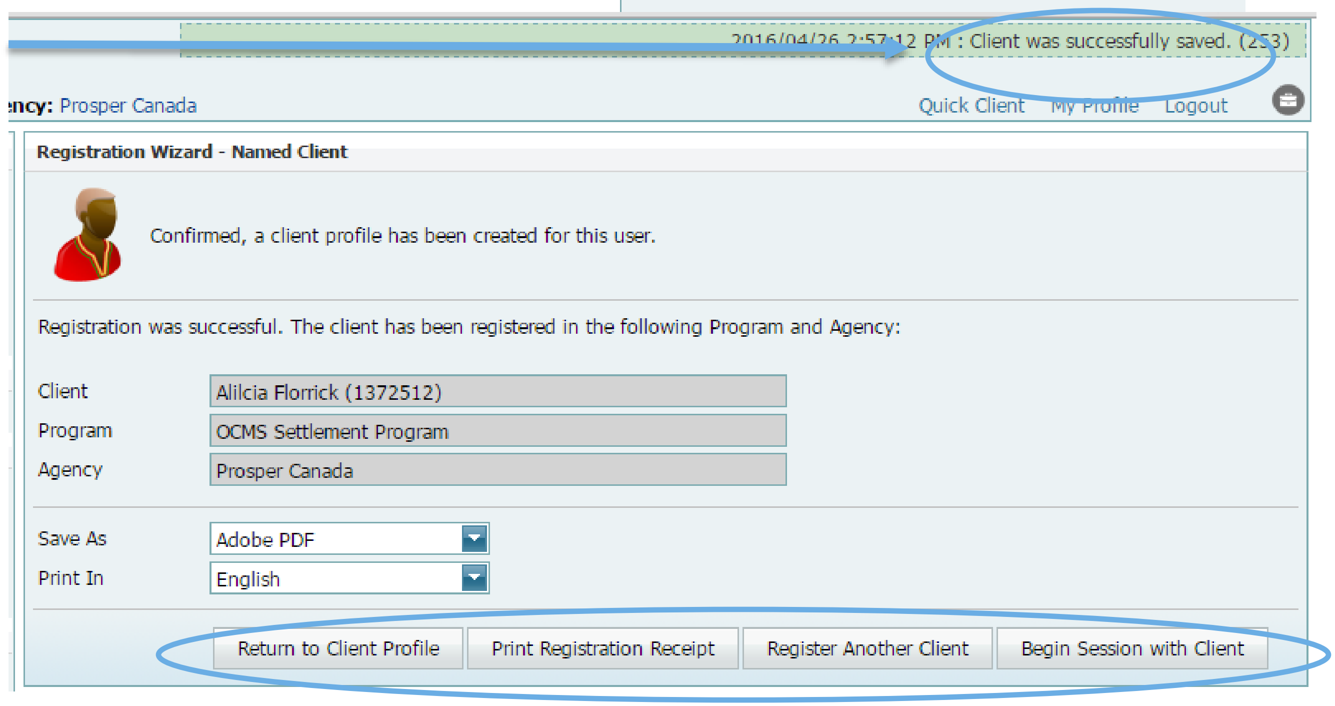
Successful Registration



<u>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)</u>



The system will ask whether you want to "save without Client ID." **<u>It is OK to click YES</u>** – 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.

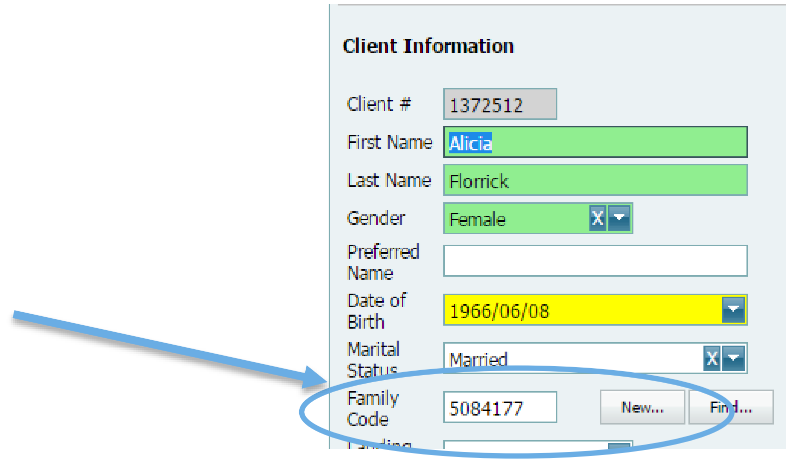
Print Registration Receipt = this will offer a printout of all the intake information in the Client Profile.

Register Another Client = as it indicates.

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

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

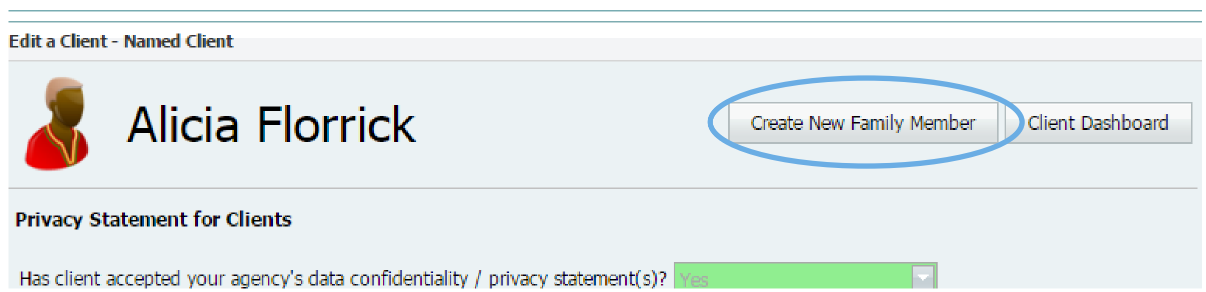
Any client record can have children added, as shown above. To add a spouse, the spouse must have their own record created as a **Named Client**.



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.

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

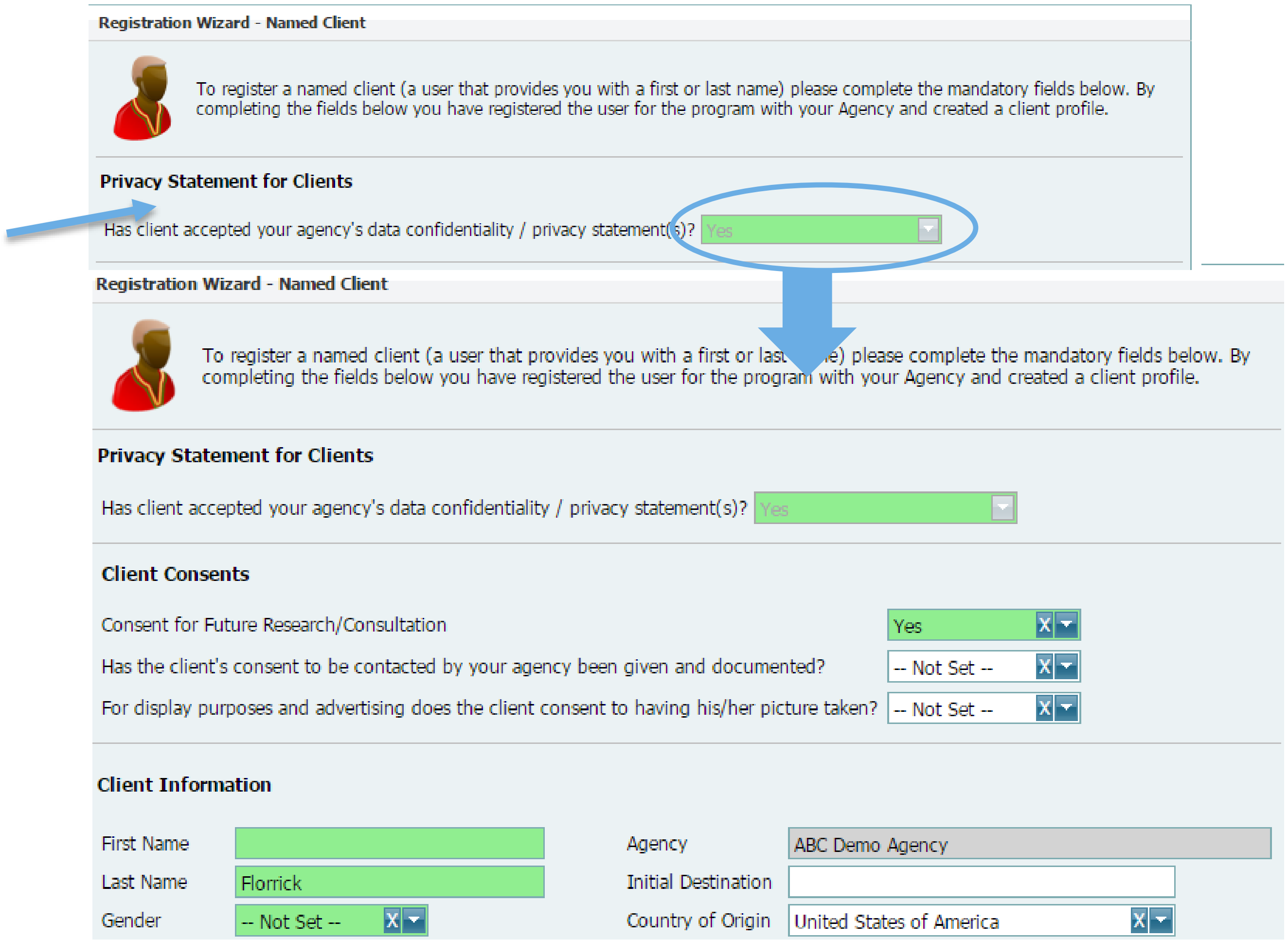


(This step CONTINUES next page…)

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.



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

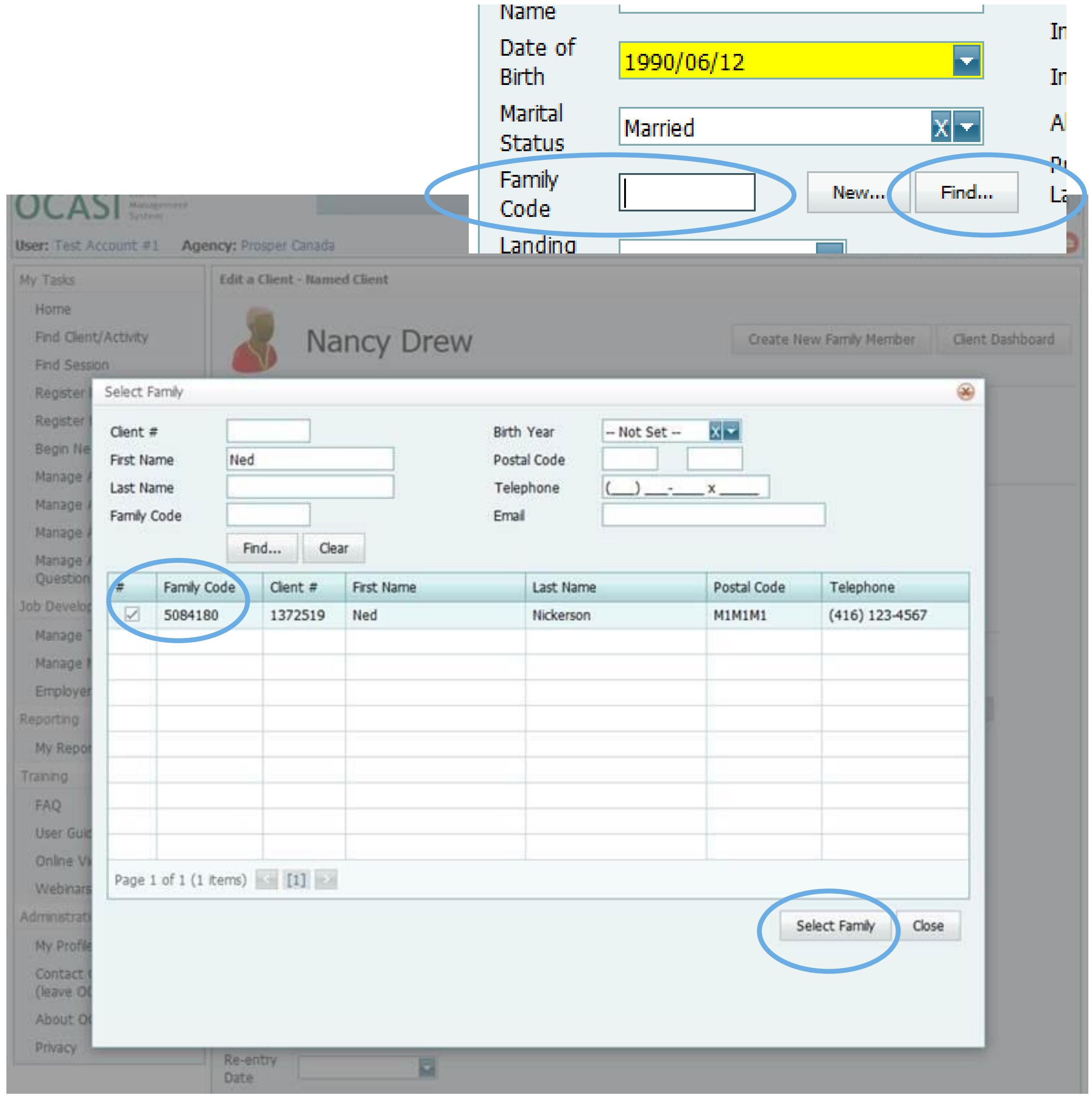
You may have Clients registered individually in the OCMS who you want to record as part of the same family – for example, two people who individually receive services on their own but are married. Or, a client and their parent or grandparent. **One of these Clients must already have a Family Code assigned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



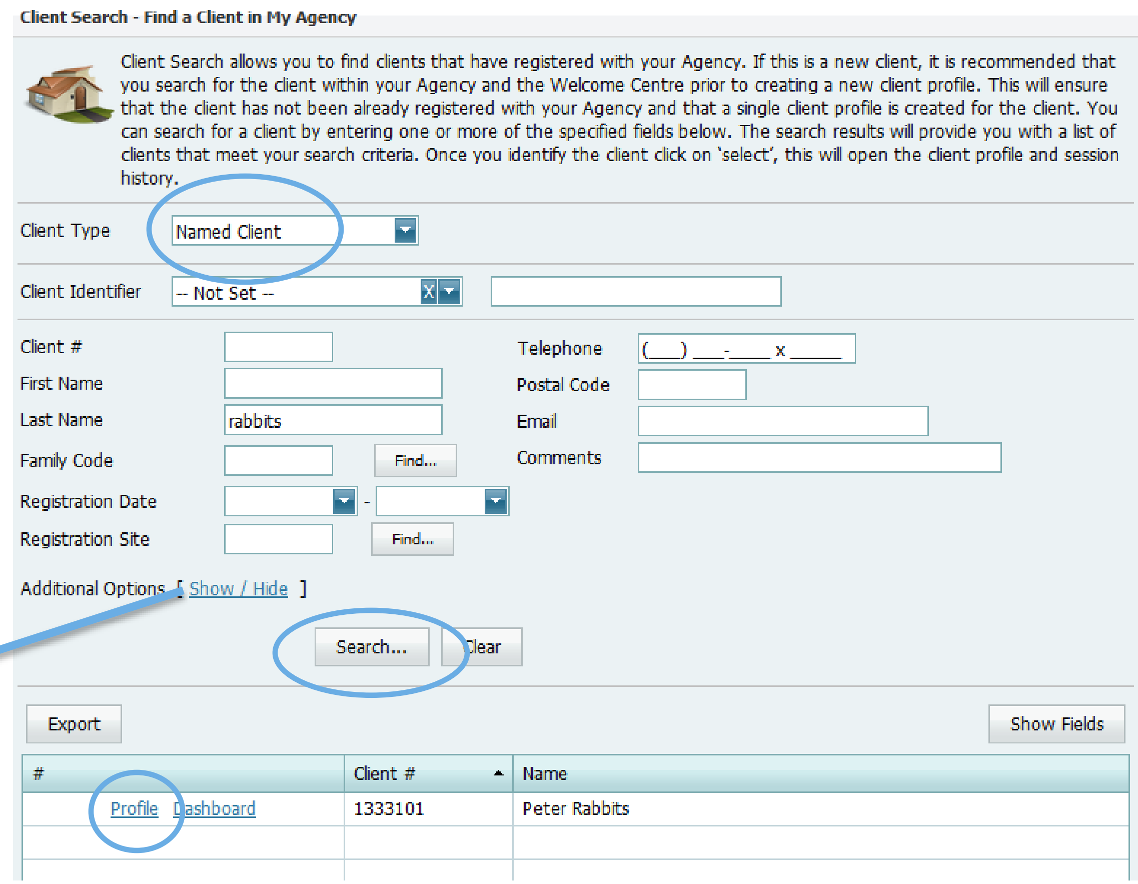
To Edit A Client Record

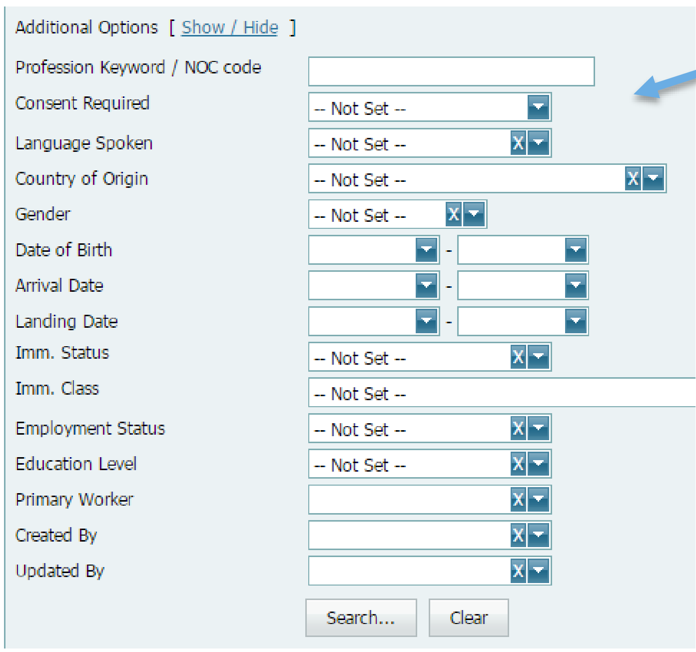
1. Search for the Client Record

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**.





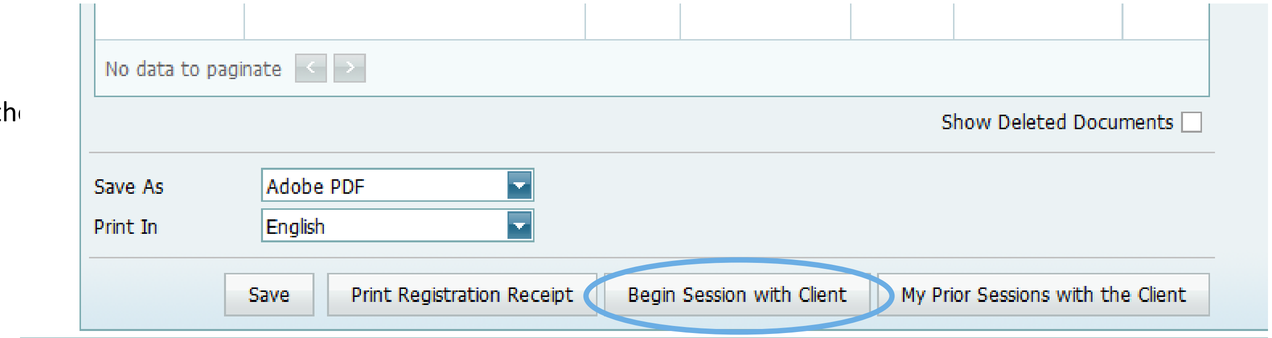
2. Edit Client Information and Save

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

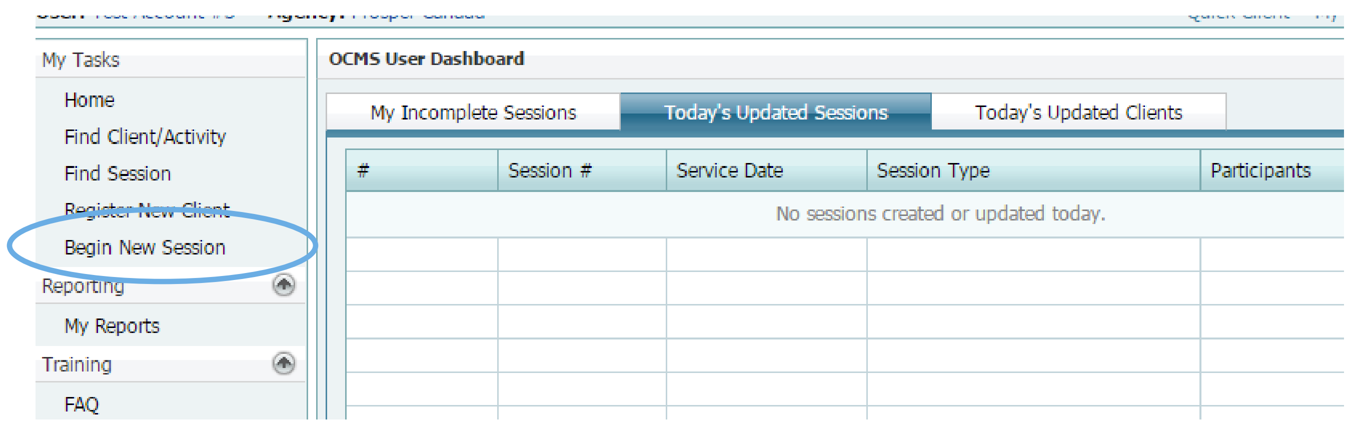
First, locate the **Client Profile**. These steps are shown on th



2. Begin Session with Client

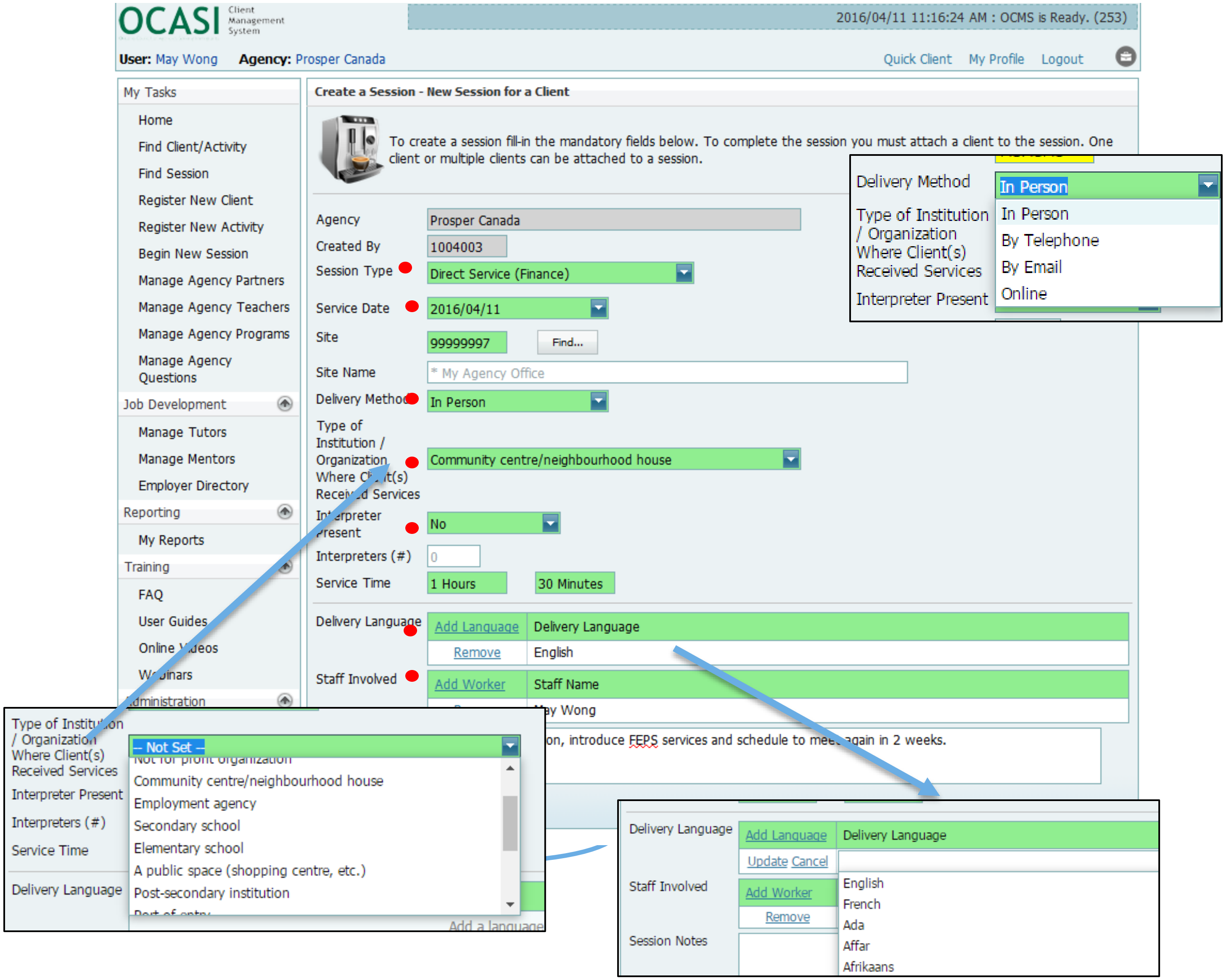
You can access a new session by clicking **Begin Session with Client** right at the end of the client profile.

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



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

3. Create A Session



<u>**Session Type** = "**Direct Service (Finance)**", make sure this is selected otherwise you won't be able to access the FEPS forms.</u>

Enter data as required, all <u>**green**</u> 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, <u>**and click Update to save the field**</u>.
Service Time must be at least 10 minutes.

<u>**Upon saving the session, it will give you the access to add the FEPS Form (next page).**</u>

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.

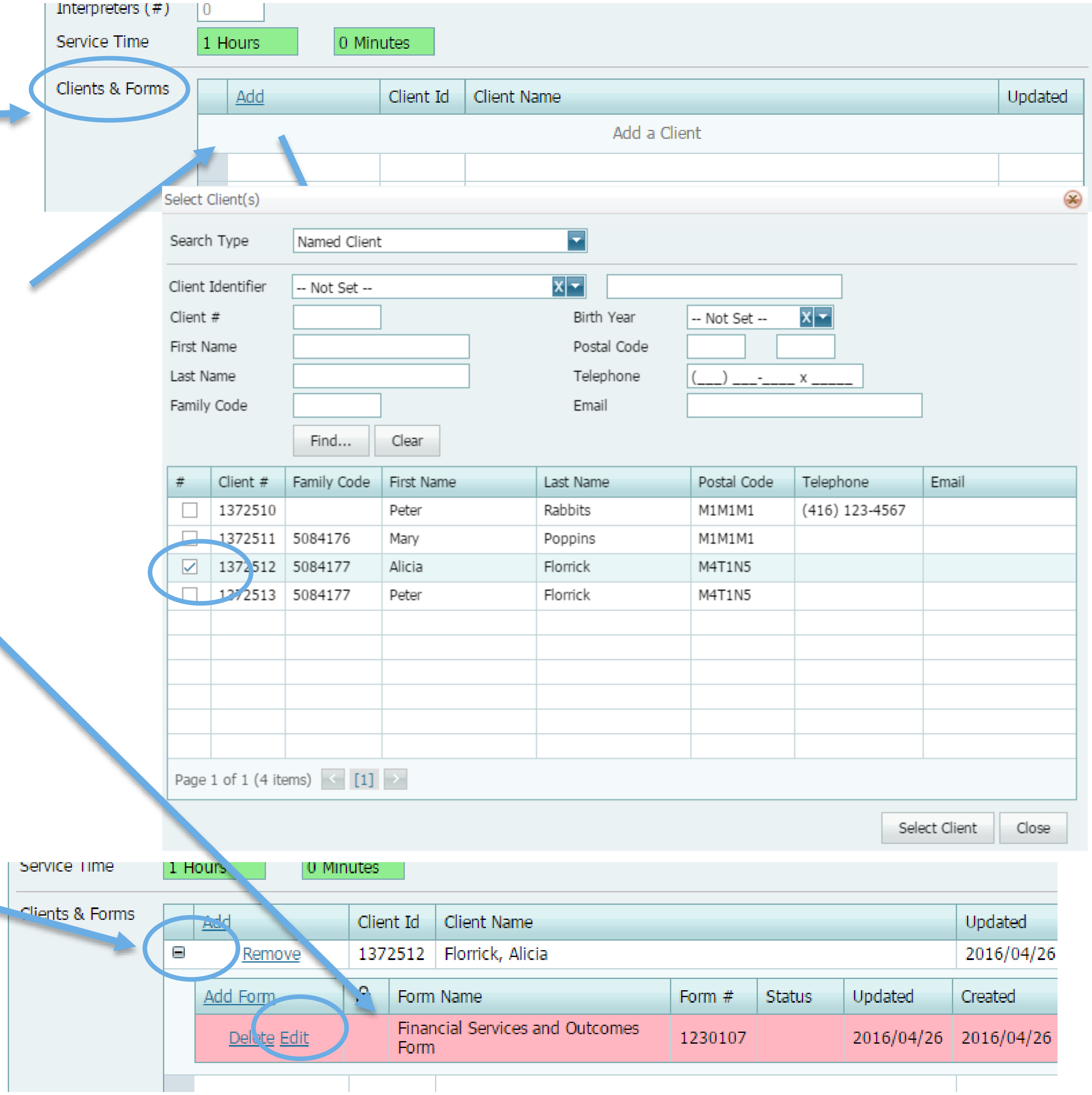
If you have started a session from the Home Dashboard, you will first need to **Add** a Client to the Form.

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

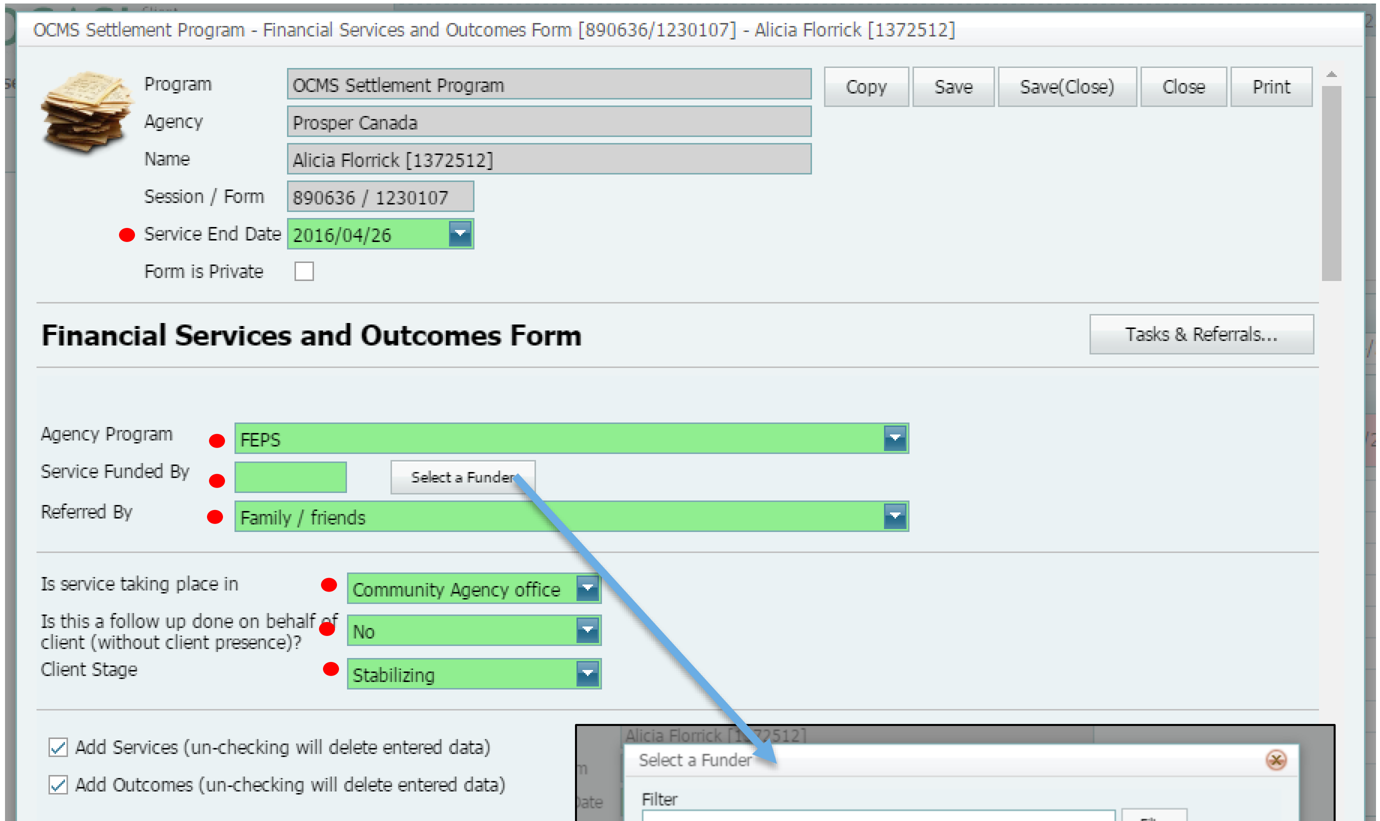
After you **Select Client** the client will be added to the Direct Service (Finance) form.

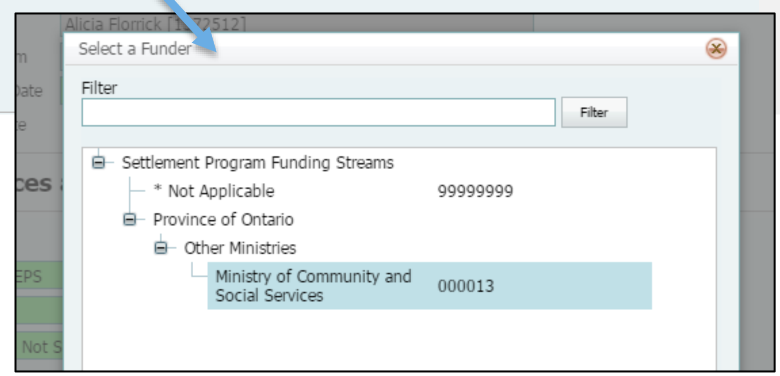
NOTE that the form record is currently in **PINK** because it is incomplete – the form has not yet been filled out with the session information.

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!



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.)

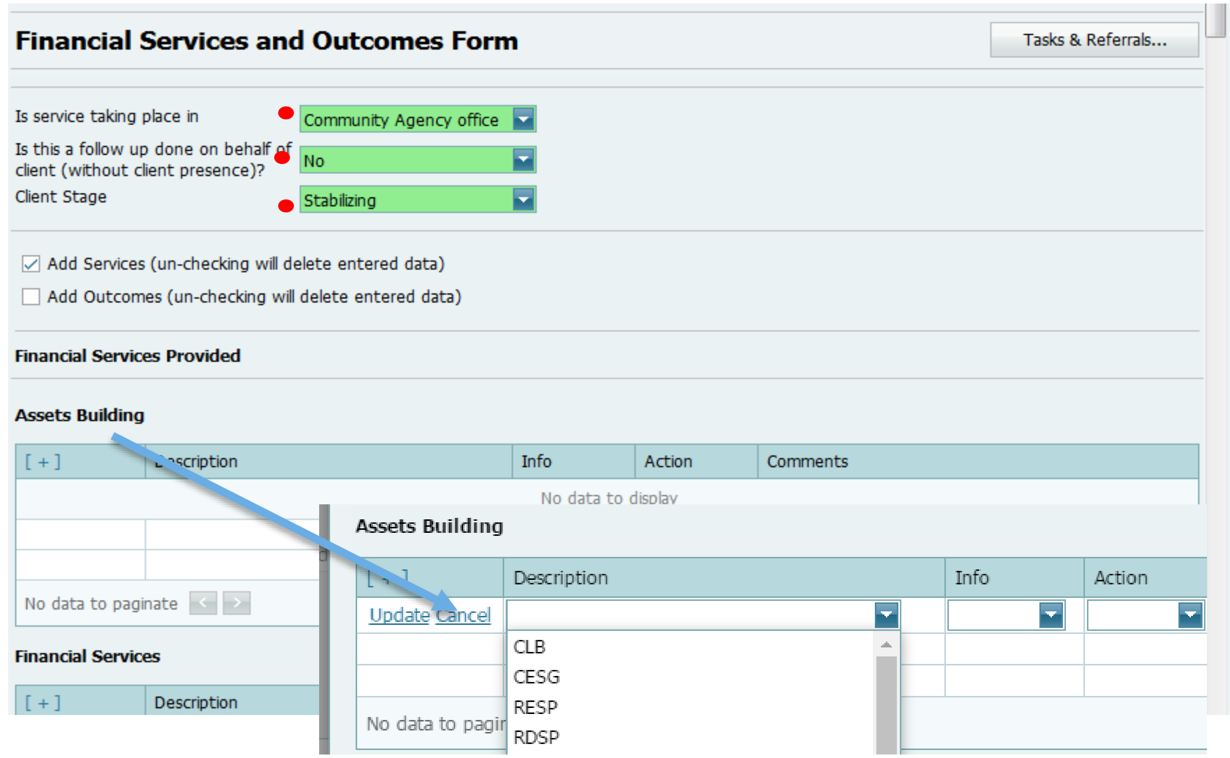
Enter **No** if this is a session with client and continue to enter all necessary data.

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.

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.

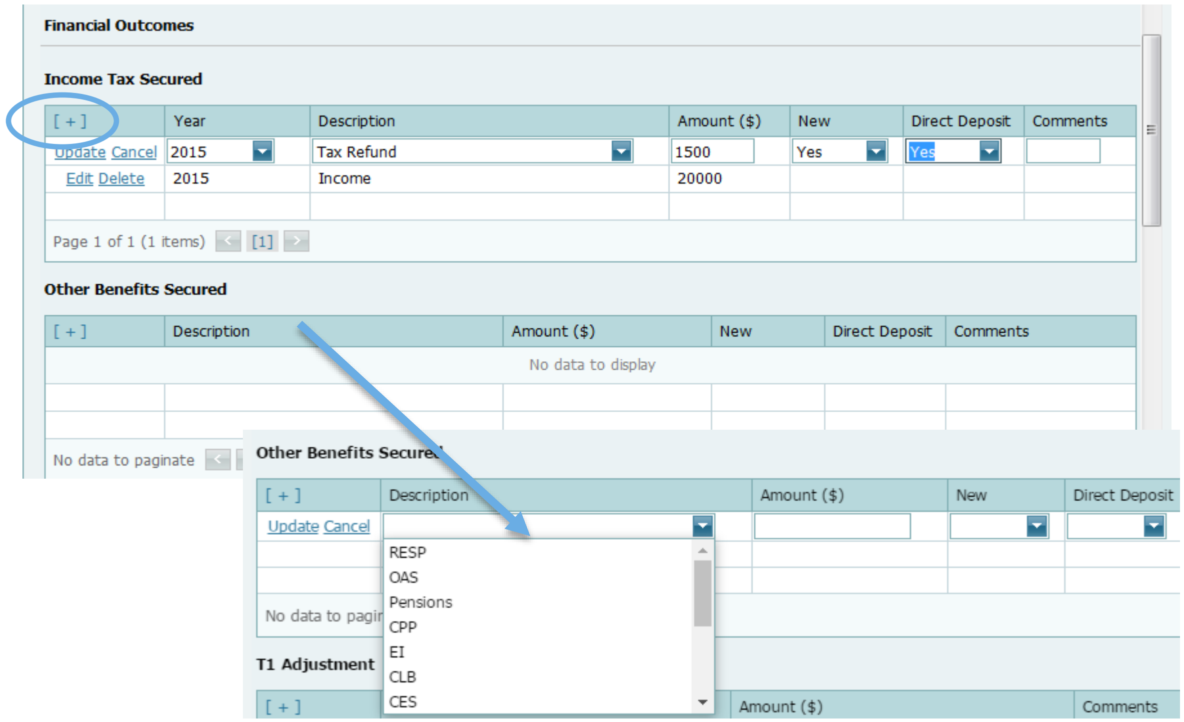
Financial Services include:

- 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!**

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 <u>personal life change</u> aspects for the participant

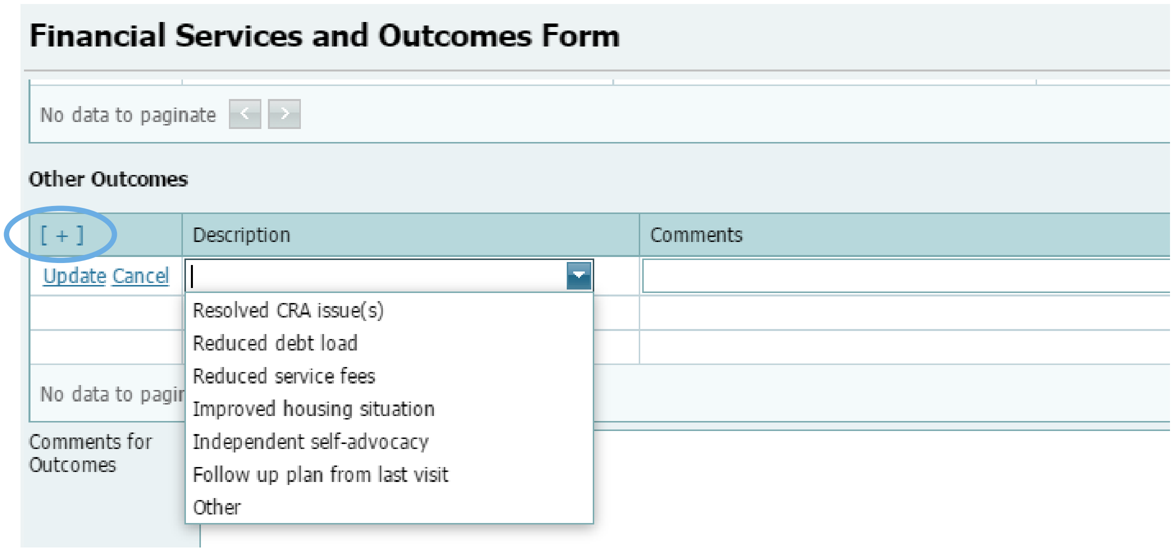
<u>**Make sure to click Update for each row upon completion of data entry!**</u>

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.

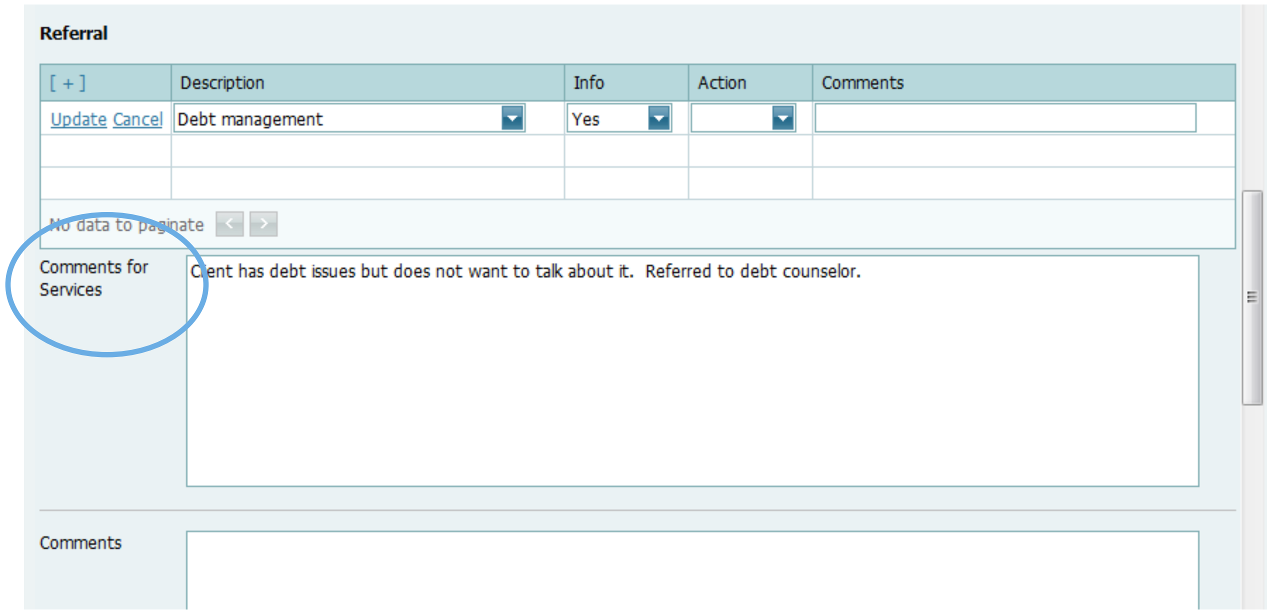
For example, "Resolved CRA issue(s)" and "Reduced debt load" may each be selected once, but "Reduced debt load" may not be selected twice. If the same selection is entered, the second one will not be saved upon clicking "Update."



6. Comments

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

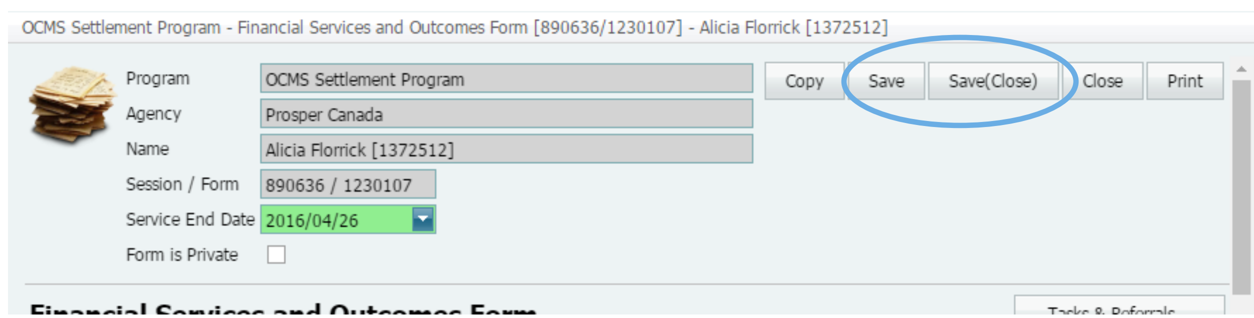
These can be useful for a case worker to note things to follow up on, steps taken, other information that would be good to identify for a different case worker reviewing the file.



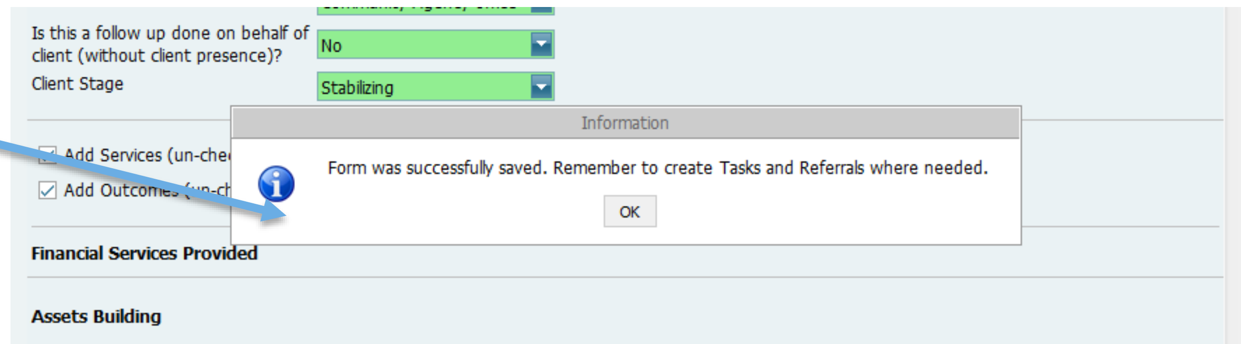
7. Save to Finish

<u>There are TWO "Save" steps to completely save a Session in the OCMS.</u>

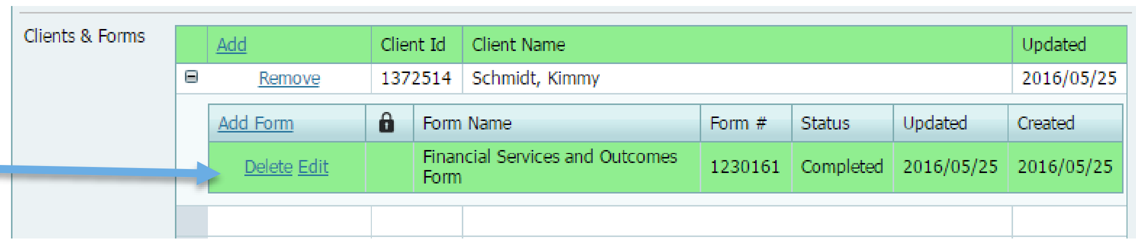
<u>Remember to Click Save at the Top of the Screen to complete the Session record. This saves the Form information with all the Services and Outcomes.</u>



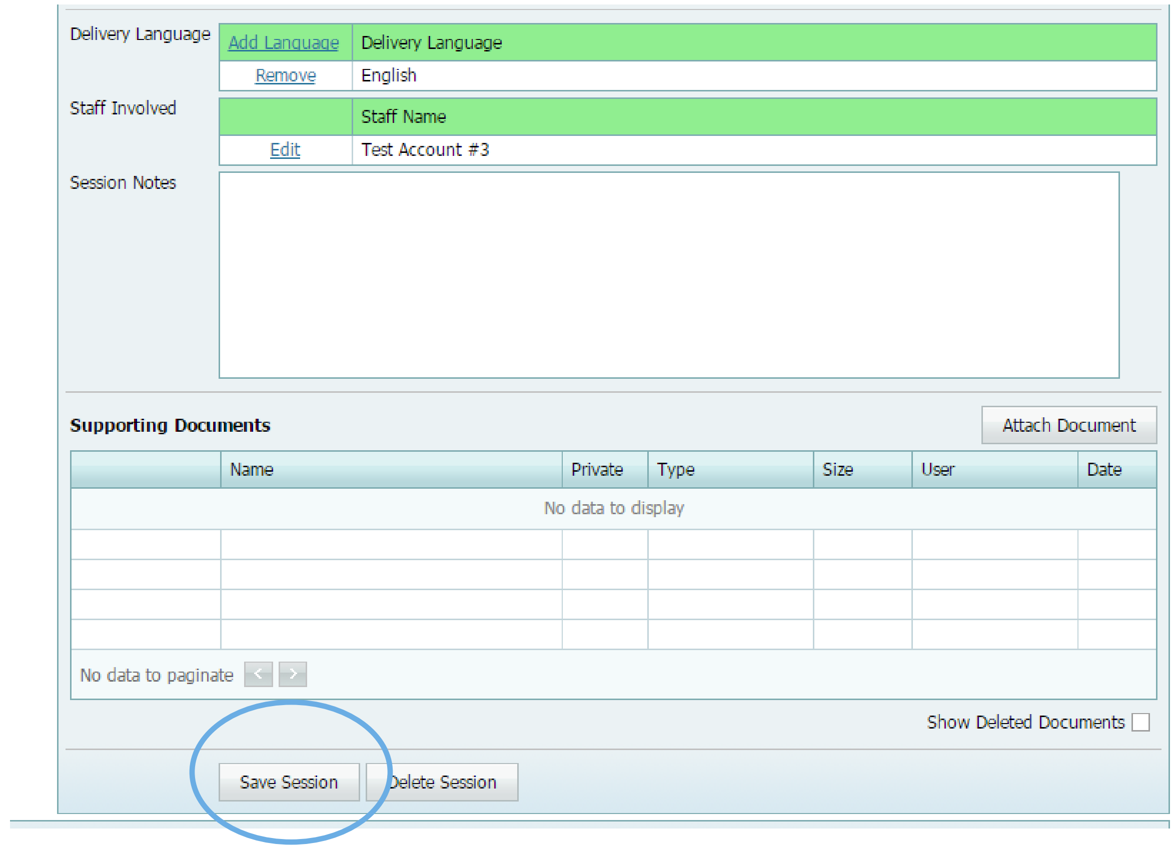
<u>When you save your Form record, you will receive a pop up prompting you to create Tasks and Referrals, this is optional and not required by FEPS.</u>



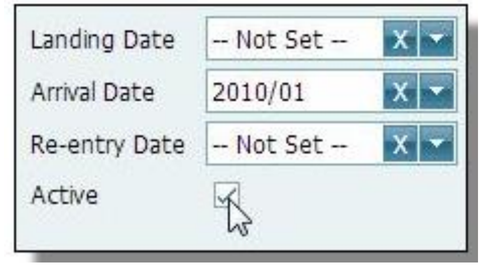
If you have Saved the Session form correctly, the Client Form section in the Edit A Client Session Page will now be **<u>GREEN</u>**, instead of pink:



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:



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.

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 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.
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.