Alliance for Healthier Communities
Alliance pour des communautés en santé

Q&A: Recording Community Initiatives in PS Suite EMR

This Q&A document was created to address questions that were asked during the rollout webinar for the new Community Initiatives (CI) reporting process, during which we introduced the new custom forms for recording CIs in TELUS PS Suite EMR, and the new CI Data Entry Manual that accompanies them.

Some of the issues addressed within this Q&A document, such as the key differences that distinguish CIs from Personal Development Groups, are discussed with additional detail in the Manual. `

Jump to Topic

Access to Resources

Where is the CI Guide found?

The Community Initiatives Data Entry Manual was emailed to centres with the forms to be imported into PS Suite. The guide and other resources are also available on [the Alliance website]() (also [in French]()) and the DMC Sharepoint site.

Which staff were the forms emailed to?

Executive Leads and copied to the DMC email group.

Will there be a training webinar for staff, including how to differentiate a CI from a PDG?

There will be another support webinar in October. Christine Randle is available for individual support to centres as needed.

About Community Initiatives (and how they're Different from Groups)

How do you know what is a Community Initiative?

Community Initiatives are programs that consist of a set of activities focused on strengthening the collective health of a community versus a Personal Development Group (PDG) that focuses on improving the health of the people/individuals involved.

If the purpose of 'health fairs' is to increase knowledge of community supports, would that be a CI?

It would depend on the purpose of being at the fair.

- If the purpose was to share information about the centre, that would not be a CI.
- If the centre had a CI about reducing diabetes rates in the community at large, and diabetes education was done at the fair, then it would be one activity of the CI that month. Attending the fair would not be a CI on its own.

If you have a program offering foot screening to prevent lower limb amputation, would that be considered a CI?

In that case, you are hoping to improve the health of the individuals that you are screening, and it would be a Personal Development Group (PDG). Just because an event happens in the community does not make it a community initiative.

Outreach/connection to higher risk communities: ILOT initiatives would not count as Community Initiatives?

If by ILOT, you mean Inclusive Local Economic Opportunities, that would be a Community Initiative. However, the outreach/connection would not be the CI; the CI would be the ILOT initiative itself.

Would having a booth at AFROFEST and handing out HIV information and possibly doing HIV testing be a CI?

A centre might have a CI about reducing the rates of HIV in their community, that would be the CI. Attending AFROFEST would be an activity of the CI. The HIV testing would be either a PDG or individual encounters, depending on how they were documented.

What if you are doing workplace health screening – offering blood sugar, blood pressure and other assessment in collaboration with different employers in the community?

Normally, this would either be a PDG or individual encounters done out in the community, but it would not be a CI. However, if you had a CI about reducing Chronic Diseases in your community, and you partnered with local businesses to do a workplace screening, this would be one of the activities of the Initiative.

Can a PDG also be an activity under the CI?

A PDG can't be an activity under the Community Initiative because that would be double counting. However, CIs and PDGs can be linked together; a CI might generate a PDG, or a PDG might generate a CI. You would only count the participants once. If you are looking to improve the health/wellbeing of those individuals, it would be a PDG.

Documenting a Community Initiative

When are we required to start documenting CIs in PSS?

The forms have been shared and can/should be imported into PS Suite as soon as a centre is ready. They should start being used when providers are notified. This change is not being mandated by Ontario Health or any funder, so there is no hard-and-fast date that centres should start. However, it was noted in the Auditor General's report that there is a lack of data for this important work.

Do we document community initiative activity every week or monthly?

There are two Community Initiative forms: a registration form that is created at the *beginning of the CI*, and a monthly activity form that is completed monthly.

If we don't have a plan to hold a CI a month, should we create the CI in the beginning of the month?

The Monthly Activity Form should be completed for each CI at the end of every month. There is a checkbox for "No Activity This Month" which you can use when no work on the CI happened during the month. Remember that you are recording all of the activities that take place within a CI within this one monthly form – so that would mean that nothing at all happened. Typically, a CI is not a one-time event.

If we run a yearly community initiative, should it be added yearly. For example "initiative 2025", "initiative 2026" etc.? Each would have its own activity entries.

Community Initiatives are often long programs that span multiple years, and there is no need to divide it into yearly documentations. This is done for PDGs in order to more easily manage the attendance lists.

What if you have a CI with multiple staff working on activities? Identify a CI lead and everyone reports activities to them to be added to the monthly PSS note? Or would they all add a monthly note? Or add to the same monthly note?

The centre can decide on the best workflow but only one form is put in monthly. Either all of the information is sent to a "lead" to enter at the end of the month, or each person involved in the CI enters their own data into the same form over the course of the month. Each person does not enter their own form.

Can there be multiple monthly notes added by multiple people?

No – see above. Each person does not enter their own form; only one form is added per month.

What if we create a community initiative – *sense of belonging* – that will summarize all events we do in community to increase the sense of belonging. How do we go back and chart those individual events under CI?

The use of the CI forms is today forward, there is no need to go back and document things that happened in the past, unless your centre wants to. You can create a CI and use the Registration Form to document information about it. You could backdate Monthly Activity Forms to show the work that has already happened for this CI if you choose to do so.

We currently create a group with name of "workshop, events…". Then add each event as a session under the group. Should we stop doing this and switch to today's method?

If the work that you are doing is intended to improve the health/wellbeing of the community at large, then this should be documented using the new Community Initiative forms. If the change is expected at the individual level, then it would remain a Group. Some work that centres do would not be considered a group or CI, this work should not be documented in either place, it is still important work but just not a PDG or CI.

Should we choose "Other Doctor" in the Patient MD/NP field?

Since the Community Initiative forms need to be 'housed' in a client chart you don't want them to show up in reports about real clients. To assist with this, you should mark them as 'Not Rostered', 'Inactive' and 'Other Doctor' in the appropriate fields.

What are some examples of "participants" and associated count that is being requested, within the community initiative tool?

A participant count might be the number of people from different agencies that you worked with that month, or it could be the number of people you reached at an event that is part of the CI. The total number would be <u>all</u> of the people from <u>all</u> activities related to the CIs (meetings and events combined).

Reporting

Will there be a LogiReport query shared to pull the data from CI?

Similar to PDGs and Individual work, Views have been created for Community Initiatives. There are four Views in total - two detailed views (one for each form) that show every option for each data field. Two summary Views were also created that combine the options for each question into one field. Centres can use these Views to create Business Views and Reports. The follow-up webinar on October 22 will focus on reporting.

Do you know if there is going to be streamlined infrastructure in LogiReport (shared SQL, dedicated View, ...), or are we expected to build our own data pulls based on the custom form name?

See above - summary Views were created that combine the options for each question into one field. Centres can use these Views to create Business Views and Reports.

Is there any standard search and LogiReport to pull data from these forms?

Both Summary Views and Detail Views were created. Centres can use these Views to create Business Views and Reports. All data from custom forms is available in PSS Searches but it is more difficult to put the data into a usable format.

Can you clarify how these CI will be reported in OHRS? Will they be captured under groups, individual visits, or both?

Community Initiatives are not counted in OHRS, but there is an expectation that OH and other funders would like to see this information in the future through a different type of reporting, such as SAA or QI Plans. There is currently no requirement for this.

If this is not captured in OHRS, how is the data reported to Ontario Health?

See above. At this time, there is no requirement to provide the data to OH. The change from the CIRT was made to provide an easier way for providers to enter the data.

We are not a part of BIRT, so how would our CI's be included in reporting? Is this mandatory in this case?

Although the hope is to eventually get the CI data into BIRT, it is not a dependency. Your data is available to you through LogiReport.

Of all the fields in the monthly and registration of CI's, what data will be pulled for CHC-wide reporting?

At this time, there is no provincial/CHC wide reporting requirement. However, the amount of data collected on CIs was streamlined. We expect all centres to collect information in all fields, allowing any of it to be available for provincial reporting in the future. This data is important to tell the CHC story.

Other

Is it possible to modify, edit, or add items to this form, if there are priority data needed for a CHC? Or this is a standardized form for all CHCs?

At this time, we are asking centres not to make any changes to the forms. The items on the forms were chosen by a committee that reviewed Community Initiative documentation. If there are things that you would like to see added, changed, or removed, please notify the Alliance. We would like to have these suggestions vetted and made for all centres, rather than have individual centres making changes that may impact reporting.