

Welcome

Client Service Model Workshop

Assessment, Planning,
Evaluation and Measurement of
Client Outcomes.

April 20, 2010



Goal of Workshop

- Provide an overview of St. Leonard's unique marriage of CANS assessment and Agency Planning and Evaluation Model.
- Highlight use of Client Service Manager software (CSM) which integrates CANS with the Agency Planning and Evaluation Model.



CSM High-level Overview

- Simulates business process - 3 Areas of Function
 - Referral/Waiting List management
 - Case Management
 - Group Management
- Transaction driven, data driven & user defined
- Supports CANS/Treatment Planning and any type of user defined assessment
- Scalable, on-site or hosted solution (e.g. SLC 180 users)
- Sophisticated security, multi-Agency support
- Whole product, proven solution



Assessment

Comprehensive overview of client's situation.

Includes:

- Client view of Strengths, Needs, Stage of Change, Culture, Development, Expectations, Preferences.
- Multiple sources of information.
- Reports by other service providers during the previous two-year period.

Purpose:

- To develop a treatment/action plan in cooperation with client.

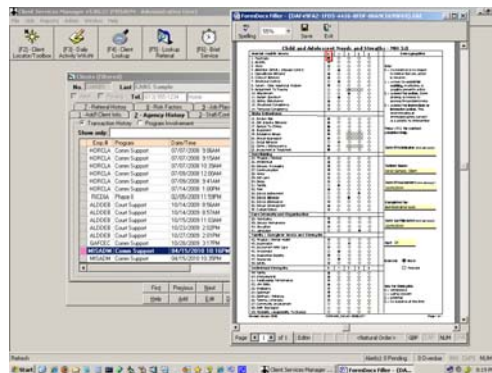


CANS

- An Item Level communication tool used every 30 days.
- Enables shared vision of client's treatment/action plan based on strengths and needs. (Includes culture and development.)
- Focuses on the What not the Why.
- Item Level scores translate into client goals.
- Enables staff to take a service integration approach to client service.



CANS Assessment in CSM



- Recorded as a transaction.
- Data extracted from Assessment for trend analysis / aggregate Reporting / linkage to TPs
- User defined assessments and data extraction
- Intelligent forms (pre-loaded data, VB Script)
- Unlimited POWER!
...unlike similar web-based solutions

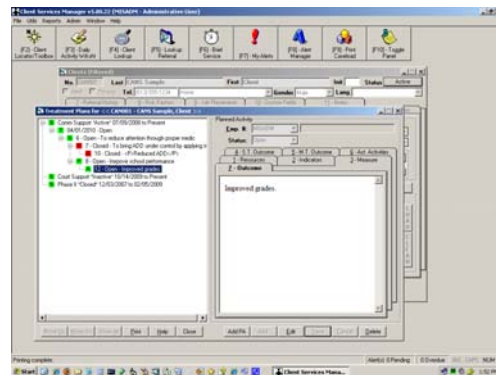


Using the Planning/Evaluation Model

- Client Name
- CANS Dimension
- Goal
- Planned Outcome
- Planned Activity
- Resources
- Evaluation (Activities, Outcomes, Resources)



Treatment Plan Screen



- Treatment Plans linked to service incidents
- Goals linked to Treatment Plans
- Planned Outcomes linked to Goals
- Activities linked to Planned Activities
- Tree view intuitive/reflects data structure



Treatment Plan Report

ADDENDUM 1B - Planning and Evaluation Template - Treatment/Action Plan

Client Name: CHSE Group, Client ID: CHSE01, Date Issued/Revised: 04/12/10, Period Covered: 04/12/10 to 05/31/10

PLANNING				
PLANNED OUTCOMES	PLANNED ACTIVITIES	RESOURCES	OUTCOME INDICATORS	MEASUREMENT METHODS
GOAL: To reduce alcohol through targeted activities				
CANNED DIMENSION: (Review initial alcohol of CHSE of April 1, 2010)				
1. To bring AOD under control by meeting medication regimen under doctor supervision	Prescribed AOD	Dr. Rx, specialist, psychologist and ...	Decreases made by Dr. in year from self in clinic	Short-term AOD in under control with medication
2. Increase patient performance	Improved patient	Ms. Smith, a local teacher	Improve a patient's bio. profile and overall successful management of AOD	Greater alcohol control to allow average team

- Presents TP in 8 ½ x 14 landscape format
- Clear and easy to read/follow.
- Any format / variations possible



Treatment / Action Plan

- Flows from assessment findings about client's strengths and needs.
- Establishes *goals, planned outcomes, planned activities and resources*.
- Incorporates the views, preferences and informed consent of the client.
- Service coordination and multidisciplinary involvement.
- Regular evaluation of the treatment/action plan with client.



Writing Goals, Planned Outcomes, Planned Activities, Resources.

- See Website for Formulas in Client Service Model for Planned Outcomes and Planned Activities. i.e.....

• Outcomes - By _____
Time Frame Verb Noun Level of Change

• Activities - By _____
Time Frame Verb Noun Level of Activity



Resources

- Goods,
- Services,
- People (specify),
- Money.



Outcome Indicators

- Quantifiable Measures of Change
- See
- Hear
- Program attendance, school grades, crime free record, substance abuse free behaviour, etc.



Measurement Method

- Tool that quantifies level of change (shown by indicators,) level of activity and cost.
- School attendance registers, academic grading systems, occupancy or utilization logs, teacher observation, police criminal record checks, case notes, focus groups, interview guides, psychometric tests, CANS.
- Thought, Emotion, Behaviour.



Evaluation

- **Actual Activities** (what was done – *Level of Activity*).
- **Actual Outcomes** (what changed – *Level of Change*).
 - **Short-term** outcomes describe positive “internal” changes in *feelings, values, attitudes and knowledge*. Self-reported by clients.
 - **Mid-Long term** outcomes describe “external” changes in *behaviour, improved conditions or skills*. Behaviour observable by others.
- **Actual Resources** (what was the cost).



Why CSM?

- Conceived designed and engineered as a **flexible/configurable enterprise business solution built on a rock solid foundation** (“the horse goes before the cart”).
- Can be thought of as the “The SAP for Human Services”.
- Marriage of CANS/ANSA or any useful assessment with the Treatment Planning model as a function of service delivery – the Transaction.
- **Flexible! Powerful! Scalable! Easy to use! Proven.**



Thank You

Please feel free to contact us if you have any further questions.

William Sanderson
Executive Director
(519) 759-8830
(519) 770-2642 Cell
wsanderson@st-leonards.com

Joseph Naszady
1 Court Terrace
Brockville, Ontario
(877) 342-1755
(613) 341-1755 Cell
naszadyj@csmssoftware.net
www.csmssoftware.net

