

# Ontario Common Assessment of Need (OCAN) Overview

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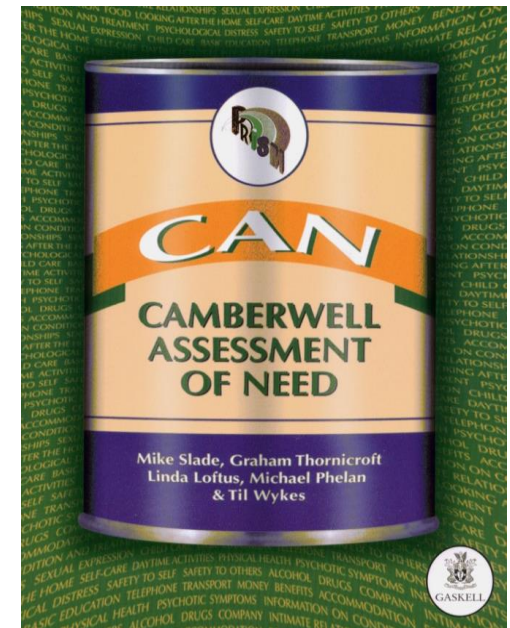
# Tool Selection

In 2007, a process was launched to select a standardized assessment tool for the community mental health sector, including:

- criteria established by sector for the common assessment tool
- robust analysis of more than 80 assessment tools shortlisted from >300 tools
- rigorous review by consumers, other stakeholders and leading academics

# OCAN

- In 2008, the sector adopted what would become known as the Ontario Common Assessment of Need (OCAN)
- Based on the Camberwell Assessment of Need
- Elements added to reflect Ontario's community mental health sector
- Scope of Implementation: community mental health services



# What is OCAN?

**Ontario Common Assessment of Need (OCAN)** is a standardized, assessment that allows key information to be electronically gathered in a secure and efficient manner.

- Supports a **consumer driven approach** with the inclusion of a self-assessment
- **Supports conversations** with consumers about needs, strengths and actions
- Provides aggregate data to **inform** organizational, regional and provincial level **planning and decision making** that is consistent with a recovery approach
- Further **facilitates inter-agency communication** through common data standards

# Project overview and development

2007

## Phase 1 – Initiation (with stakeholder representation)

- Analysis of many assessments tools
- Selection of a core tool – Camberwell Assessment of Need
- Province-wide consultations to introduce the tool

2008

## Phase 2 - Pilot

- Piloting of the automated OCAN in 16 CMH organizations
- Early learnings gatherings
- NE LHIN Implementation pilot

2009

2010

## Phase 3 - Implementation

- Provincial roll-out
- Health service provider (HSP) reports to inform service delivery and planning

2011

2012

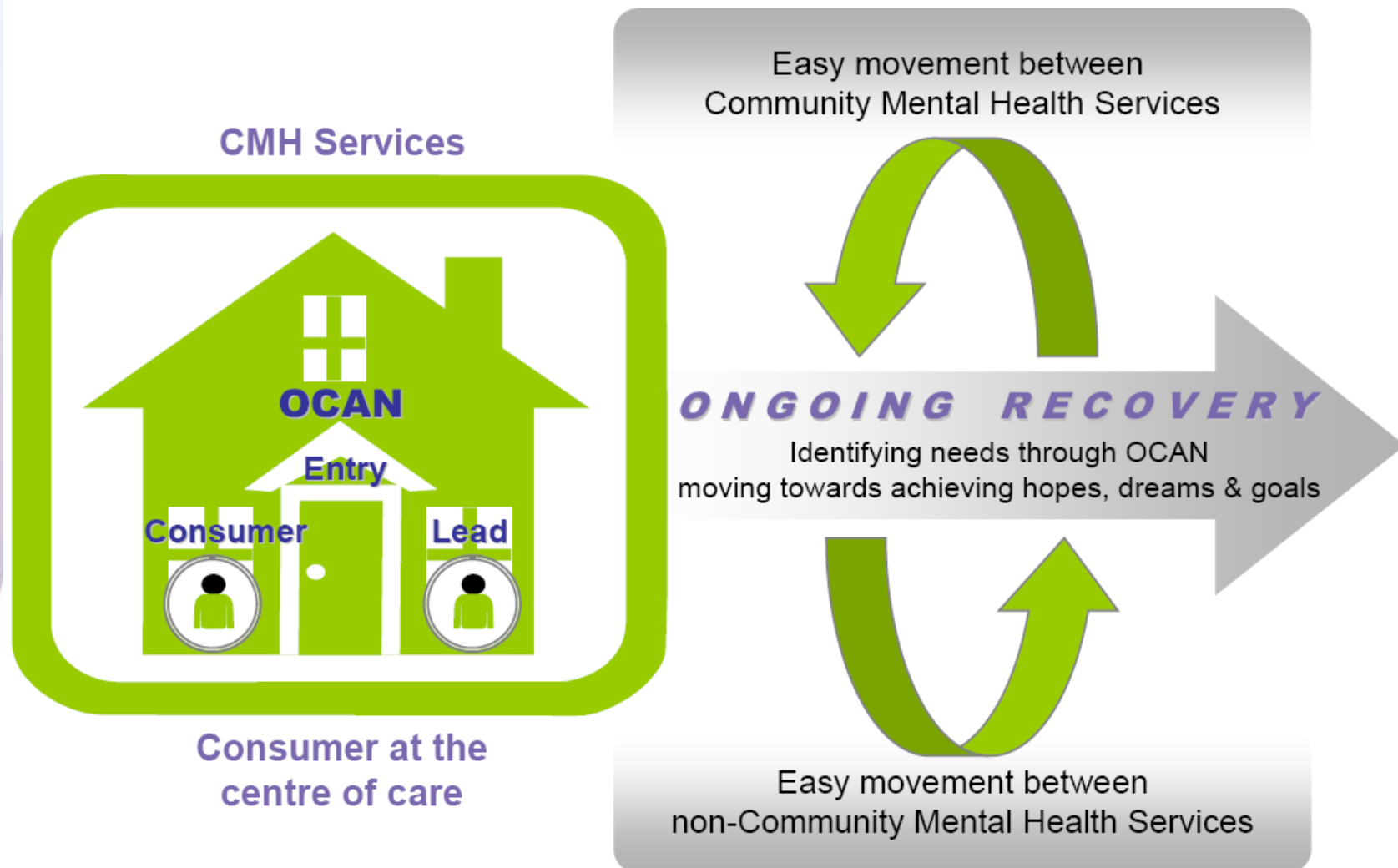
2013

## Phase 4 – Operations/Sustainability

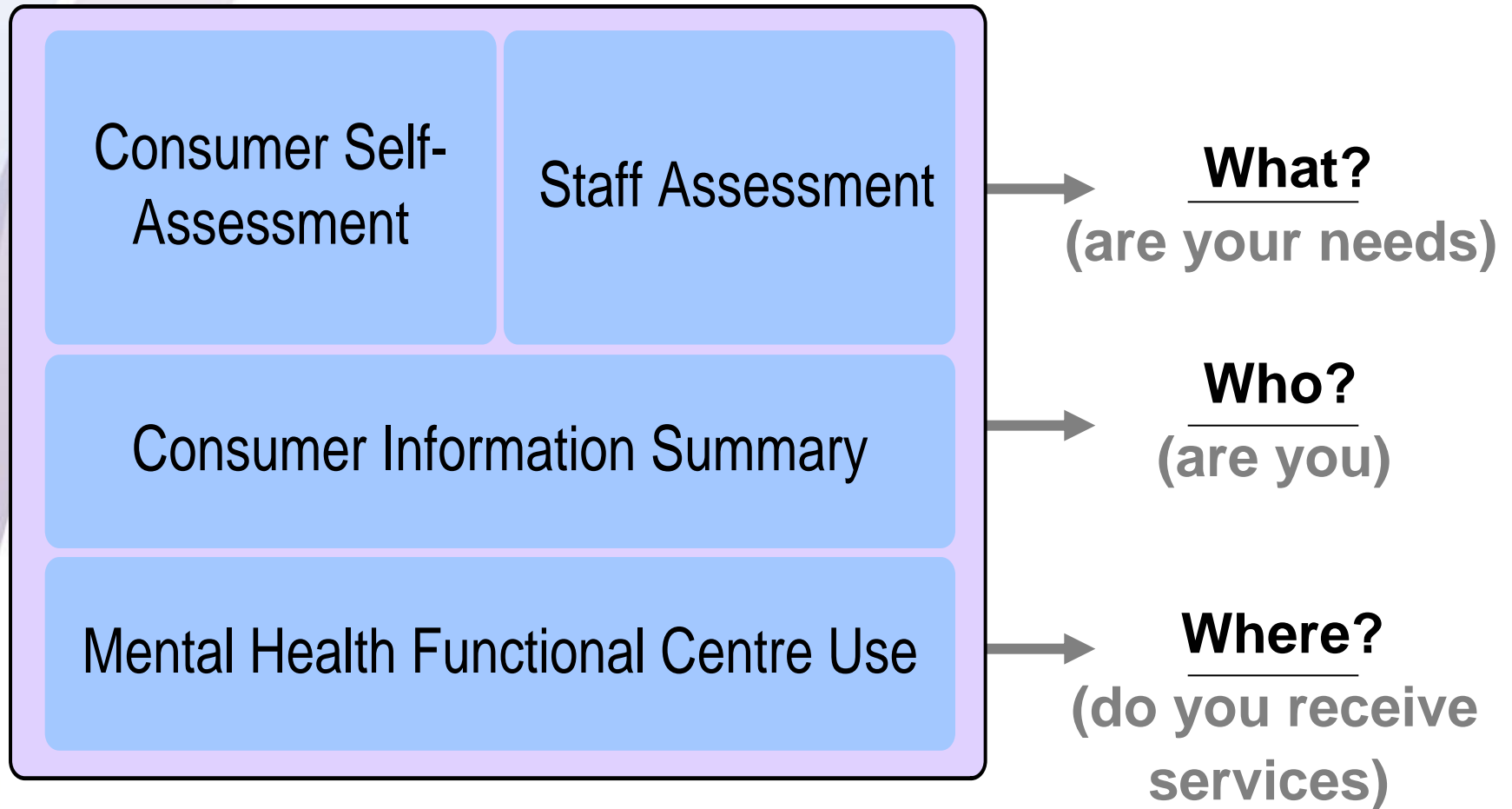
- Continued use of OCAN
- Ongoing support through the CCIM Support Centre
- OCAN quality and utility webinars
- LHIN reports to monitor and support OCAN use

2015

# O CAN vision



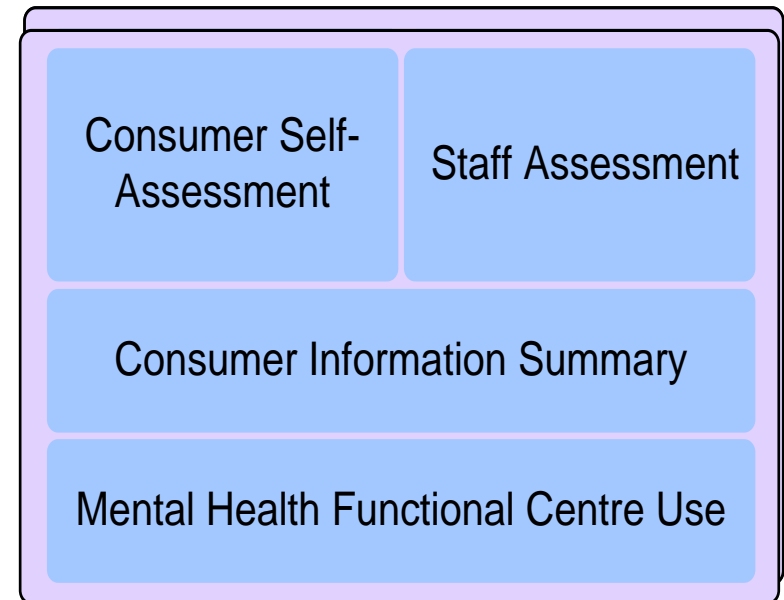
# OCCAN at a glance



# OCCAN Assessment

There are three “types” of OCCAN:

- The **CORE OCCAN** consists of the Consumer Information Summary and the Mental Health Functional Centre Use
- The **CORE + Self OCCAN** consists of the Consumer Information Summary elements, the Consumer Self-Assessment and the Mental Health Functional Centre Use
- The **Full OCCAN** consists of the Consumer Information Summary, the Consumer Self-Assessment, the Mental Health Functional Centre Use and the Staff Assessment



# Functional Centre use of OCAN

Full OCAN		Core OCAN
<ul style="list-style-type: none"> <li>• Assertive Community Treatment</li> <li>• Case Management</li> <li>• Clubhouse</li> <li>• Early Intervention</li> <li>• Social Rehabilitation/ Recreation</li> <li>• Support within Housing</li> <li>• Short-term Residential Crisis Support Beds</li> </ul>	<ul style="list-style-type: none"> <li>• Day/Night Care</li> <li>• Counseling and Treatment</li> <li>• Diversion and Court Support</li> <li>• <b>Dual Diagnosis</b></li> <li>• Psychogeriatric</li> <li>• Forensic</li> <li>• Vocational Employment</li> <li>• <b>Concurrent Disorders</b></li> </ul>	<ul style="list-style-type: none"> <li>• Peer/Self-help Initiatives</li> <li>• Crisis Intervention</li> <li>• Community Mental Health Clinic</li> <li>• Eating Disorders</li> </ul>



The Provincial Consumer Working Group recommends the use of Core + Self OCAN for Peer/Self-Help initiatives as a peer-to-peer recommendation

# Core OCAN Overview

- ✓ Consumer Basic Demographic Information
- ✓ Mental Health Functional Centre Use
- ✓ Contacts
- ✓ Consumer Capacity
- ✓ Culture and Citizenship
- ✓ Current Legal Status
- ✓ Housing Type
- ✓ Employment Status
- ✓ Education level
- ✓ Psychiatric History
- ✓ Income
- ✓ Presenting Issues

# OCCAN elements related to identifying racialized populations

14. What culture do you (consumer) identify with?

15. Aboriginal Origin (select one)\*

- Aboriginal                       Non-aboriginal                       Consumer declined to answer                       Unknown

16. Citizenship Status (select one)

- Canadian citizen                       Temporary resident                       Consumer declined to answer  
 Permanent resident                       Refugee                       Unknown

17. Length of time lived in Canada (number of years/months):

18. Do you have any issues with your immigration experience? (select all that apply)

- None                       Experience with war/incarceration/torture  
 Lack of understanding of the Canadian system/resources                       Refugee camp  
 Applying previous work experience/professional qualifications                       Experience with other trauma  
 Separation from family members/significant others                       Other \_\_\_\_\_  
 Family left behind in refugee camp                       Consumer declined to answer  
 Unknown

19. Can you tell me about your immigration experience?

20. Experience of Discrimination (select all that apply)

- Disability                       Mental illness                       Other \_\_\_\_\_  
 Ethnicity                       Race                       Consumer declined to answer  
 Gender                       Religion                       Unknown  
 Immigration                       Sexual Orientation

21. Service recipient preferred language:\*

22. Language of service provision:\*

# Open Ended Questions in OCAN

Please write a few sentences to answer the following questions:

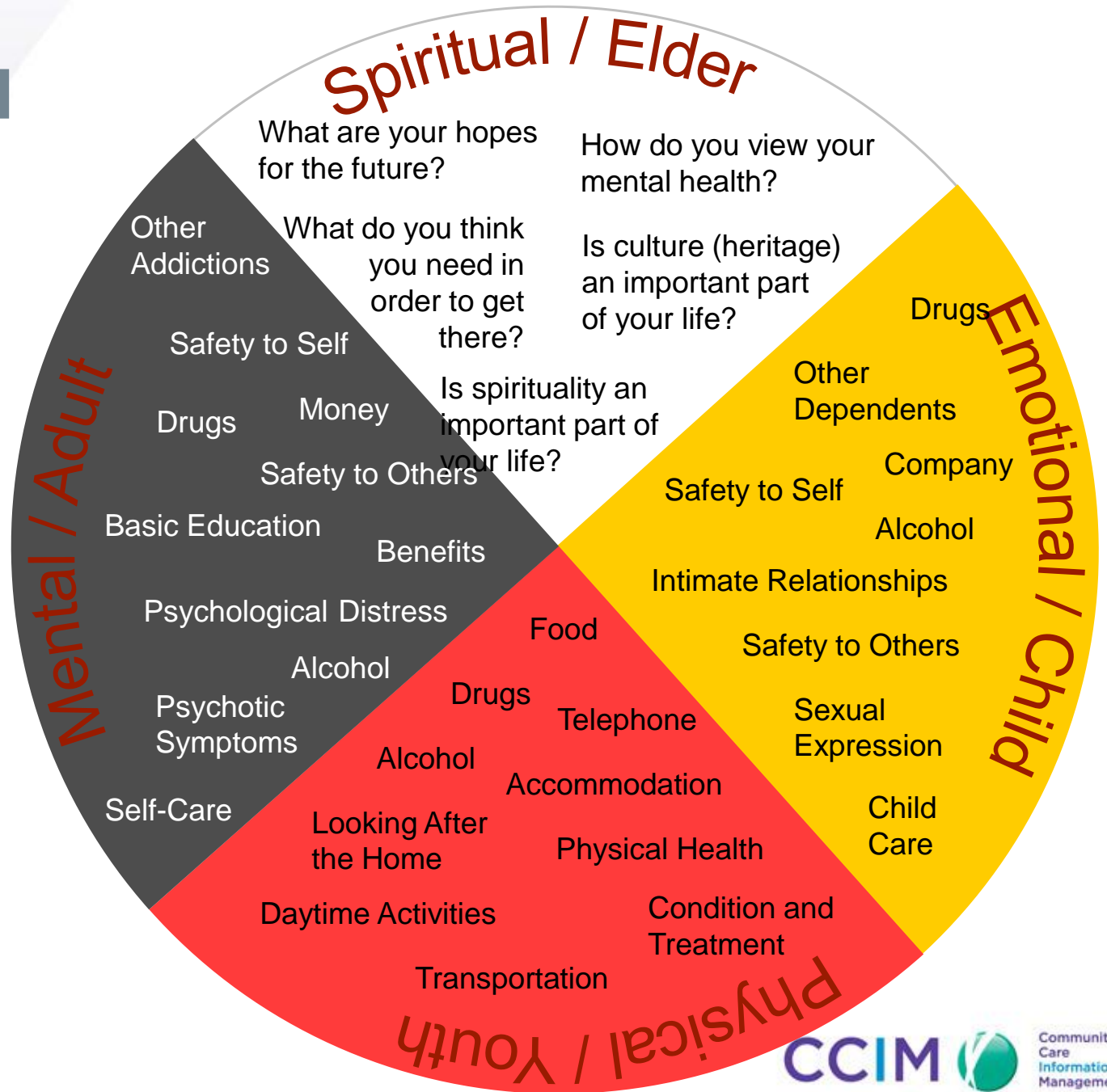
- What are your hopes for the future?
- What do you think you need in order to get there?
- How do you view your mental health?
- Is spirituality an important part of your life?
- Is culture (heritage) an important part of your life?

# Covers 24 Domains: Identifying Areas of Need

- Benefits
- Accommodation
- Food
- Education
- Transport
- Sexual Expression
- Looking After the Home
- Telephone
- Child Care
- Daytime Activities
- Self-Care
- Psychotic Symptoms
- Physical Health
- Money
- CDS
- Safety to Self
- Intimate Relationships
- Company
- Addictions
- Psychological Distress
- Drugs
- Information on condition and treatment
- Alcohol
- Safety to Others



**For example...**  
**OCAN and**  
**Medicine**  
**Wheel**  
**Teaching**



# Consumer Self-Assessment

Name:	
Date of Birth (YYYY-MM-DD):	
Start Date (YYYY-MM-DD):	Completion Date (YYYY-MM-DD):
<p><b><u>INSTRUCTIONS:</u></b></p> <p>When you have completed this assessment, your worker will have a conversation with you about your needs.</p> <ul style="list-style-type: none"> <li>• Please let your worker know if you have completed a Common Assessment in the last six months.</li> <li>• Please read the pamphlet provided on how your information will be used.</li> <li>• Please ask about any questions you don't understand.</li> </ul> <p>Please ✓ <u>tick one box</u> in each row (24 in total) using the following key:</p>	
No Need = this area is not a serious problem for me at all	
Met Need = this area is not a serious problem for me because of the help I am given	
Unmet Need = this area remains a serious problem for me despite any help I am given	

Rating need

No Need	Met Need	Unmet Need	I Don't Want to Answer
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

1.	Accommodation
	What kind of place do you live in?
	Comments

# O CAN Staff Assessment

Score Need

20. Basic Education		Staff Rating
<i>Do you have difficulty in reading, writing, speaking or understanding English? Any other languages?</i>		
1. Does the person lack basic skills in numeracy and literacy? *		
<i>(If rated 0 or 9, skip questions 2 &amp; 3 and proceed to the additional questions below)</i>		
2. How much help with numeracy and literacy does the person receive from friends or relatives?		
3a. How much help with numeracy and literacy does the person receive from local services?		
3b. How much help with numeracy and literacy does the person need from local services?		
Comments:		
Action(s):		By Whom:
		Review Date (YYYY-MM-DD):
What is your highest level of education? (select one) *		
<input type="checkbox"/> No Formal Schooling	<input type="checkbox"/> Some Secondary/High School	<input type="checkbox"/> College/University
<input type="checkbox"/> Some Elementary/Junior High School	<input type="checkbox"/> Secondary/High School	<input type="checkbox"/> Consumer Declined to Answer
<input type="checkbox"/> Elementary/Junior High School	<input type="checkbox"/> Some College/University	<input type="checkbox"/> Unknown

Score Help

# O CAN Staff Assessment - Need rating reference

*The intent of the needs assessment is to highlight the major issues that stand in the way of a person's recovery.*

## **UNMET NEED** **SERIOUS PROBLEM**

2

A major issue that stands in the way of person's recovery, regardless of its cause or whether help is provided

1

## **MET NEED**

No serious problem because of help given. Would be serious problem if help was stopped

Which of these ratings applies to the need in this domain?

0

## **NO NEED** **NO SERIOUS PROBLEM**

Person is independent in this domain or is relatively independent with minimal help that would not lead to a serious problem if stopped.

9

## **UNKNOWN**

No or not enough information available

# Summary of Actions

- At the end of the assessment, all actions documented will be automatically listed in a chart
- Priorities need to be entered manually

Priority	Domain	Action
1	Accommodation	Submit application for supported housing

# Research Findings



# What this means for services

Meeting consumer identified unmet needs improves outcomes



Service plans should focus on consumer identified unmet needs

Increasing agreement between consumers and staff improves outcomes



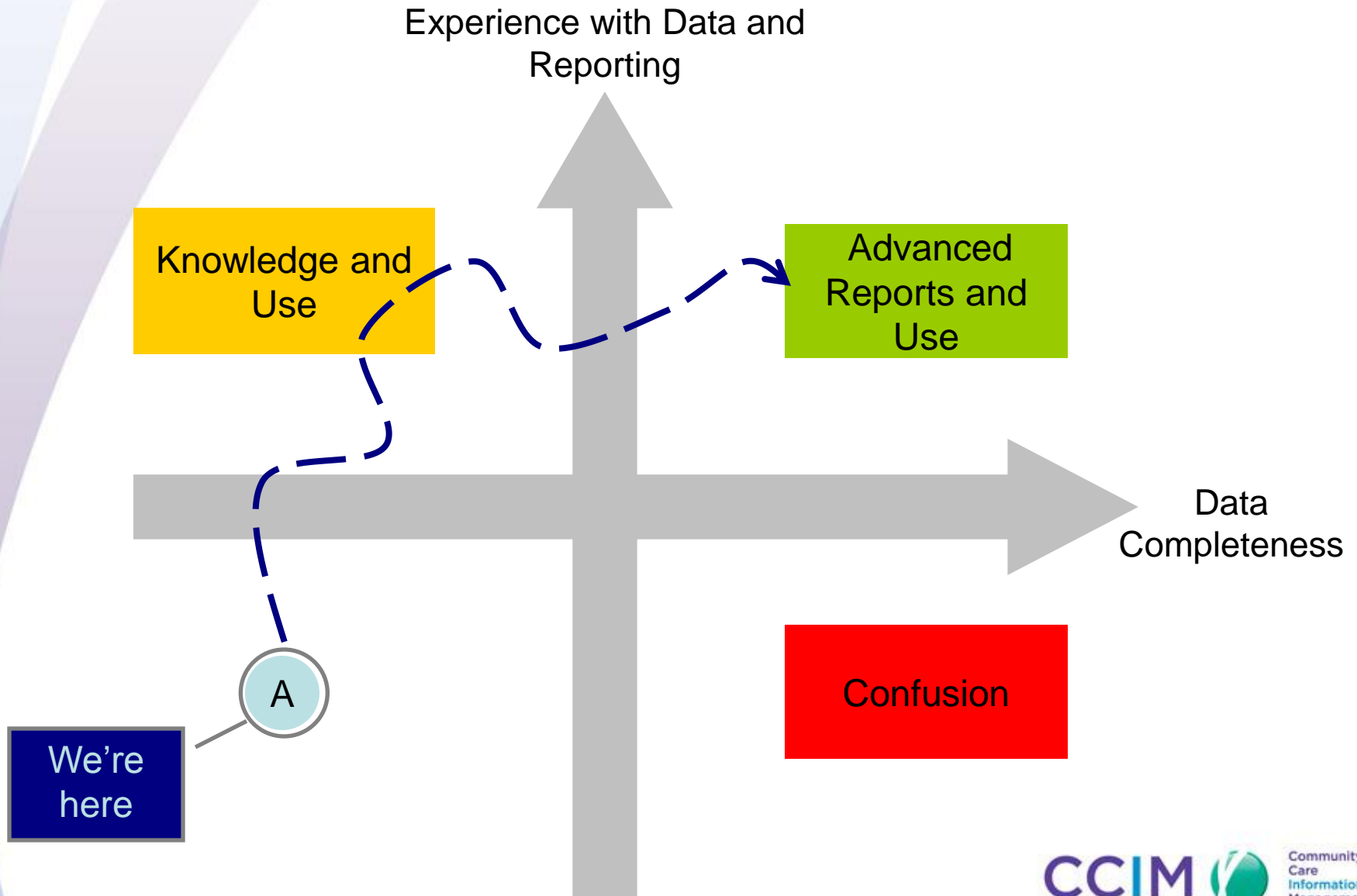
Engage in conversations that share staff and consumer perspectives about needs

Regular review with consumers improves outcomes



Use reassessments as a time to review progress and plan next steps

# Early Stages: OCAN Data & Reports



Report #1A: Aggregated Assessments Response Report  
(OCAN v2.0 Full Assessments and OCAN v1.0 Assessments)

Organization: 999 - Sample

Report Generated: 25 September, 2012

# of OCANs: 58

\* Highlights elements where percentage calculated based on number of answers received for this question

		Response Count	Response %	
Consumer Information	First Name	57	98%	
	Middle Initial	3	5%	
	Last Name	57	98%	
	Preferred Name	40	69%	
	Address Line 1	53	91%	
	Address Line 2	4	7%	
	City	53	91%	
	Province	Ontario	54	93%
	Postal Code		51	88%
	Phone Number		50	86%
	Email address		32	55%
	Age Range	(0-15) years	2	3%
		(16-24) years	4	7%
		(25-34) years	7	12%
(35-44) years		3	5%	
(45-54) years		30	52%	
(55-64) years		5	9%	
(65-74) years		1	2%	
(75-84) years		1	2%	
(85 and over)	1	2%		
Date of Birth	Estimate	0	0%	

ty

# Research Finding

- **Meeting consumer identified unmet needs improves outcomes in quality of life**

*What does this mean for service delivery?*

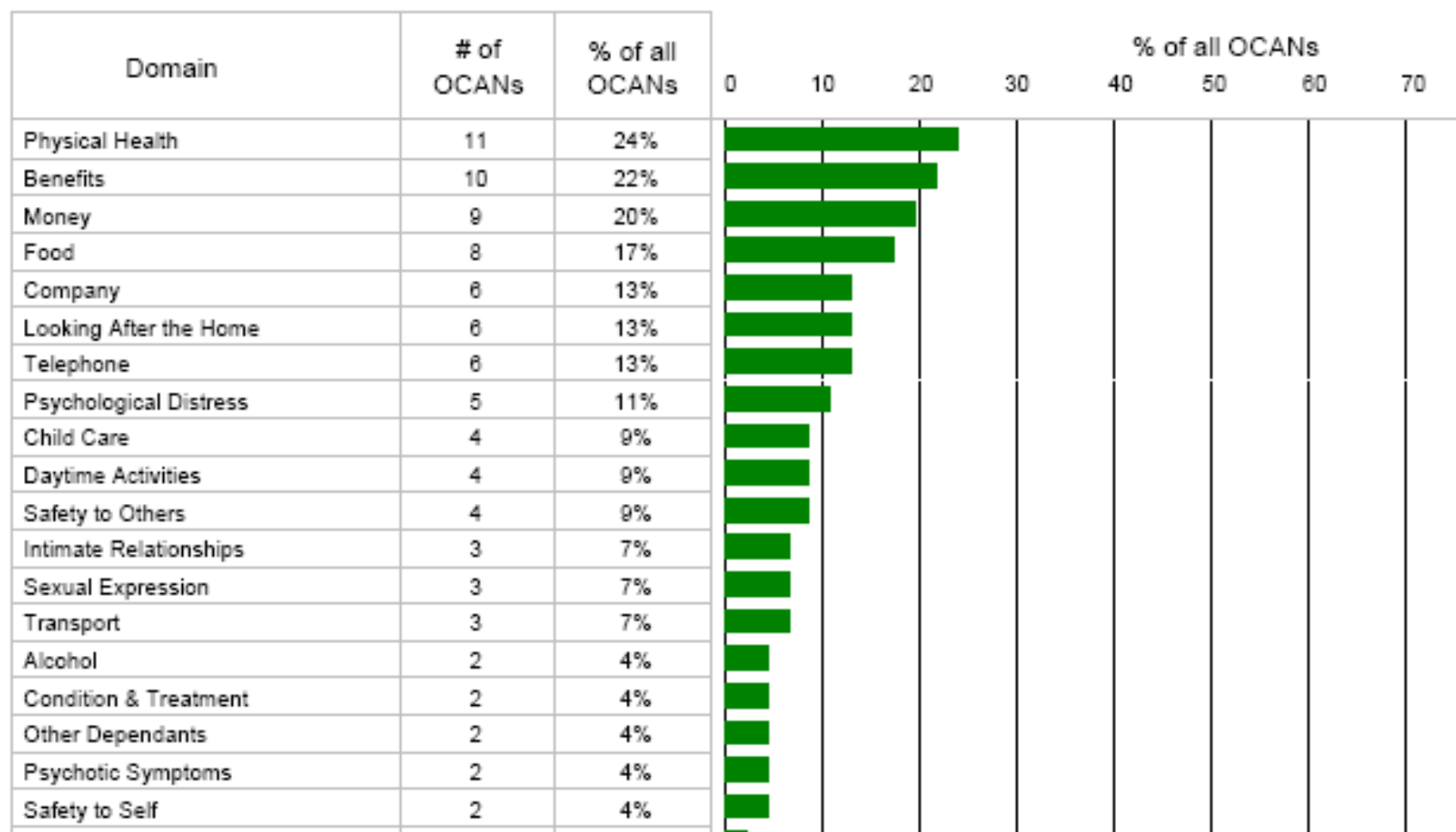
- **Services should focus on consumer identified unmet needs.**

Report #2a: NEED ANALYSIS - MOST RECENT CONSUMER SELF-ASSESSMENT  
UNMET NEED

Organization: 999 Sample

Report Generated: 25 May, 2012

# of OCANs: 46



# Report #4A: Need Analysis – Unmet + Met Needs – Most Recent Consumer Self-Assessment by Functional Centre

## Ontario Common Assessment of Need (OCAN)

### Report #4A: NEED ANALYSIS - ( UNMET + MET NEEDS ) - MOST RECENT CONSUMER SELF-ASSESSMENT BY FUNCTIONAL CENTRE

Organization: 999 - Sample

Report Generated: 25 July, 2012

# of OCANs: 51

Domain	UNMET NEED		MET NEED		UNMET NEED %	MET NEED %	% of all OCANs
	OCANs #	OCANs %	OCANs #	OCANs %			
<b>725 09 76 - Case Management Mental Health (26 Assessments)</b>							
Looking After the Home	9	35%	13	50%	35%	50%	85%
Benefits	10	38%	0	0%	38%		38%
Physical Health	6	23%	4	15%	23%	15%	38%
Condition and Treatment	3	12%	7	27%	12%	27%	38%
Money	7	27%	2	8%	27%	8%	35%
Food	5	18%	4	15%	18%	15%	35%
Drugs	2	8%	6	23%	8%	23%	31%
Psychological Distress	4	15%	3	12%	15%	12%	27%
Daytime Activities	2	8%	5	19%	8%	19%	27%
Self-Care	1	4%	6	23%	4%	23%	27%
Child Care	4	15%	2	8%	15%	8%	23%
Company	3	12%	3	12%	12%	12%	23%
Telephone	3	12%	3	12%	12%	12%	23%
Sexual Expression	2	8%	4	15%	8%	15%	23%
Basic Education	1	4%	5	19%	4%	19%	23%
Alcohol	4	15%	1	4%	15%	4%	19%
Safety to Others	1	4%	4	15%	4%	15%	19%
Psychotic Symptoms	3	12%	1	4%	12%	4%	15%
Other Addictions	1	4%	3	12%	4%	12%	15%
Transport	2	8%	1	4%	8%	4%	12%
Other Dependents	0	0%	3	12%		12%	12%
Safety to Self	0	0%	3	12%		12%	12%
Accommodation	2	8%	0	0%	8%		8%
Intimate Relationships	2	8%	0	0%	8%		8%

# Research Finding

- **Increasing agreement between consumers and staff improves outcomes in satisfaction with services and therapeutic alliance**

*What does this mean for service delivery?*

- **Engaging in transparent discussions between consumers and staff around needs contributes to a recovery approach**

## Ontario Common Assessment of Need (OCAN)

### Report #3: NEED AGREEMENT - MOST RECENT CONSUMER & STAFF MATCHED ASSESSMENTS

Organization: 999 Sample  
 Report Generated: 25 May, 2012  
 # of OCAN pairs: 46

Domain	Agreement Value	VERY LOW agreement (less than .20)	LOW agreement (.20 to .39)	MODERATE agreement (.40 to .59)	HIGH agreement (.60 to .79)	VERY HIGH agreement (.80 to 1.00)
Accommodation	0.80					
Other Dependants	0.78					
Drugs	0.74					
Psychological Distress	0.74					
Safety to Self	0.72					
Self-Care	0.72					
Basic Education	0.70					
Food	0.70					
Telephone	0.70					
Company	0.67					
Transport	0.67					
Child Care	0.65					
Other Addictions	0.65					
Safety to Others	0.65					

# Report #5A: Need Analysis by Age Range (Unmet Need) – Most Recent Consumer Self-Assessment

## Report #5A: NEED ANALYSIS BY AGE RANGE (UNMET NEED) MOST RECENT CONSUMER SELF-ASSESSMENT

Organization: 999 - Sample  
Report Generated: 25 July, 2012  
# of Most Recent OCANs: 5100

725 09 76 - Case Management Mental Health (2224 Assessments)

Accommodation	The number (#) and percentage (%) of OCANs rated as UNMET NEEDs Within The Age Range	The number (#) and percentage (%) of OCANs rated as UNMET NEEDs Across All Age Ranges Per Domain
( 16 - 17 ) years	27% ( 9 / 33 )	2% ( 9 / 377 )
( 18 - 24 ) years	16% ( 33 / 210 )	9% ( 33 / 377 )
( 25 - 34 ) years	18% ( 77 / 419 )	20% ( 77 / 377 )
( 35 - 44 ) years	10% ( 90 / 462 )	24% ( 90 / 377 )
( 45 - 54 ) years	17% ( 106 / 635 )	28% ( 106 / 377 )
( 55 - 64 ) years	14% ( 47 / 336 )	12% ( 47 / 377 )
( 65 - 74 ) years	10% ( 10 / 96 )	3% ( 10 / 377 )
( 75 and over )	16% ( 5 / 31 )	1% ( 5 / 377 )
Food	The number (#) and percentage (%) of OCANs rated as UNMET NEEDs Within The Age Range	The number (#) and percentage (%) of OCANs rated as UNMET NEEDs Across All Age Ranges Per Domain
( 16 - 17 ) years	30% ( 10 / 33 )	3% ( 10 / 330 )
( 18 - 24 ) years	10% ( 22 / 210 )	7% ( 22 / 330 )
( 25 - 34 ) years	15% ( 61 / 419 )	18% ( 61 / 330 )
( 35 - 44 ) years	17% ( 79 / 462 )	24% ( 79 / 330 )
( 45 - 54 ) years	17% ( 109 / 635 )	33% ( 109 / 330 )
( 55 - 64 ) years	12% ( 40 / 336 )	12% ( 40 / 330 )
( 65 - 74 ) years	7% ( 7 / 96 )	2% ( 7 / 330 )
( 75 and over )	6% ( 2 / 31 )	1% ( 2 / 330 )
Looking after the home	The number (#) and percentage (%) of OCANs rated as UNMET NEEDs Within The Age Range	The number (#) and percentage (%) of OCANs rated as UNMET NEEDs Across All Age Ranges Per Domain
( 16 - 17 ) years	15% ( 5 / 33 )	2% ( 5 / 297 )
( 18 - 24 ) years	7% ( 14 / 210 )	5% ( 14 / 297 )
( 25 - 34 ) years	9% ( 39 / 419 )	13% ( 39 / 297 )
( 35 - 44 ) years	16% ( 76 / 462 )	26% ( 76 / 297 )
( 45 - 54 ) years	14% ( 92 / 635 )	31% ( 92 / 297 )
( 55 - 64 ) years	14% ( 48 / 336 )	16% ( 48 / 297 )
( 65 - 74 ) years	15% ( 14 / 96 )	5% ( 14 / 297 )
( 75 and over )	26% ( 8 / 31 )	3% ( 8 / 297 )
Self-Care	The number (#) and percentage (%) of OCANs rated as UNMET NEEDs Within The Age Range	The number (#) and percentage (%) of OCANs rated as UNMET NEEDs Across All Age Ranges Per Domain
( 16 - 17 ) years	3% ( 1 / 33 )	1% ( 1 / 182 )
( 18 - 24 ) years	5% ( 10 / 210 )	5% ( 10 / 182 )
( 25 - 34 ) years	8% ( 33 / 419 )	18% ( 33 / 182 )
( 35 - 44 ) years	8% ( 38 / 462 )	21% ( 38 / 182 )

For Information:  
Call us at 1.866.802.5600  
or email to: cmhcap@ccim.on.ca

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# Research Finding

- **Converting unmet need to met need or no need leads to better outcomes in quality of life for consumers.**






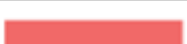
*What does this mean for service delivery?*

- **Services can demonstrate that they are contributing to positive outcomes over time**

**Ontario Common Assessment of Need (OCAN)**

**Report #6B: CHANGE IN UNMET NEED AT MOST RECENT ASSESSMENT  
STAFF ASSESSMENT**

Organization: **999 - Sample**  
 Report Generated: **25 August, 2012**  
 # of OCAN Staff sets: **254**  
 ( Set is defined as two assessments of one consumer over time )

INITIAL ASSESSMENT		REASSESSMENT AFTER 6 MONTHS			
Domain Name	# of Initial UNMET NEED	# of Reassessed OCANs	Reassessment Rating Description	% of Reassessed OCANs	Graph for # of Reassessed OCANs
<b>Accommodation</b>	10	3	No Need	30%	 3
		2	Met Need	20%	 2
		5	Unmet Need	50%	 5
		0	Unknown	0%	0
<b>Food</b>	23	3	No Need	13%	 3
		8	Met Need	35%	 8
		12	Unmet Need	52%	 12
		0	Unknown	0%	0

# OCCAN - Challenges

- Time consuming
- Keeping up with reassessment cycle
- Consumer participation in the self assessment
- Technical challenges
- Maintaining the quality of assessments

# OCCAN - successes

- HSPs implemented: 201 (81% of the sector)
- Raises issues important to the person with lived experience
- Supports a more action oriented approach
- Improves documentation
- Starting to use OCCAN data in quality improvement planning

# Questions or Feedback

- **If you have any questions or comments, please contact:**

**Project Support Centre**

**Website: [www.ccim.on.ca](http://www.ccim.on.ca)**

**E-mail: [cmhcap@ccim.on.ca](mailto:cmhcap@ccim.on.ca)**

**Telephone: 1-866-909-5600**

# Bibliography: Research Findings

- **Drukker, M., Dillen, K., Bak, M. et al (2008)** The use of the Camberwell Assessment of Need in treatment: what unmet needs can be met? *Social Psychiatry and Psychiatric Epidemiology*, 43, 410-417)
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- **Lasalvia et al (2008)** Does staff-patient agreement on needs for care predict a better mental health outcome?, *Psychological Medicine*, 38, 123-133
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- **Slade, M., Leese, M., Cahill, S., Thornicroft, G., & Kuipers, E. (2005)**. Patient-rated mental health needs and quality of life improvement. *British Journal of Psychiatry* , 187, 256-261.

# HSP Reports

Reports	Description
<b>Aggregated Assessments Response Reports</b>	-Provides response count and percentage for each of the raw elements in the OCAN <b>- 40 out of 100 clients do not have a family doctor = 40%</b>
<b>Needs Analysis Reports:</b> <ul style="list-style-type: none"> <li>• Consumers Self Assessment</li> <li>• Staff Assessment</li> </ul>	-Provides areas of need from highest to lowest -Broken down by functional centre & age ranges <b>- top 3 unmet &amp; met needs are “company”, “food” and “money”</b>
<b>Level of Agreement Report</b>	- Measures how closely consumer and staff need ratings are aligned <b>- alignment for “accommodation” is high and for “company” is low</b>
<b>Change in Unmet Needs Over Time Reports :</b> <ul style="list-style-type: none"> <li>• Consumers Self Assessment</li> <li>• Staff Assessment</li> </ul>	-Provides a measure of the impact of services on addressing client needs -Broken down by functional centre <b>-30 clients rated “drugs” as an unmet need. 6 months later, 18 rated “drugs” as a met need = 60% Progress</b>