

Accessing Information within the Mobius CCISD Case

For Delivery Services staff

Purpose of this guide

The purpose of this guide is to introduce the Citizen Centred Integrated Service Delivery (CCISD) Case Workspace, where both Alberta Supports and Persons with Developmental Disabilities (PDD) staff enter Albertan's information.

Mobius Workspaces

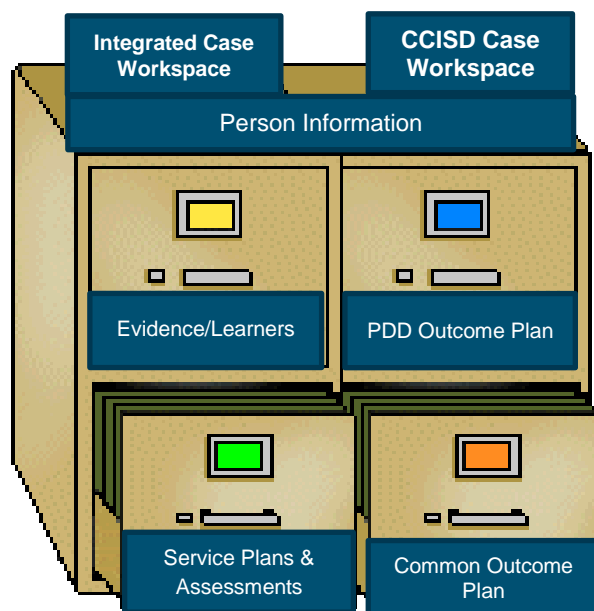
How does Mobius accommodate multiple functions?

Mobius is one system, with two different entrance points: the Integrated Case Workspace and the Citizen Centred Integrated Service Delivery (CCISD) Case Workspace. Your role will determine what access you have to the functionality within these workspaces, such as view-only or the ability to enter/edit information.

You can think of the two workspaces as filing cabinets side by side, part of the same system but holding different information for different functions. Person information (contact information, relationships, etc.) is shared across both workspaces and accessible by all users.

Integrated Case Workspace is used by Alberta Works, Advanced Education, and Labour.

CCISD Case Workspace is used by PDD and Alberta Supports staff.

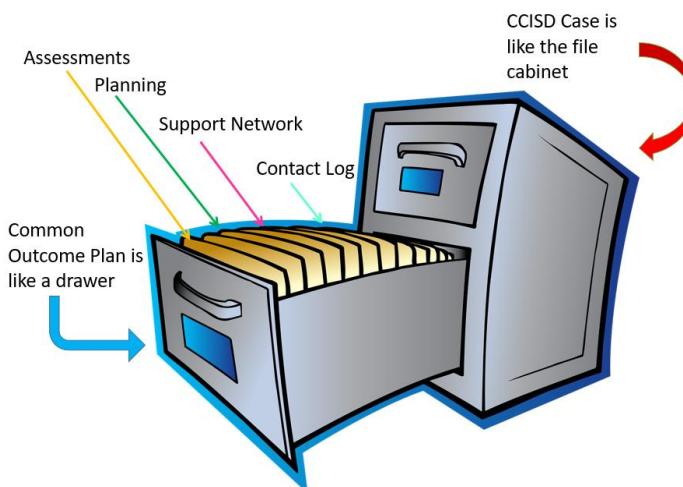


What information is in the PDD Outcome Plan?

The PDD Outcome Plan currently contains the Albertan's identified outcomes, a summary of their needs, and supports.

What information is in the Common Outcome Plan?

The CCISD Case is like a filing cabinet containing the Common Outcome Plan drawer. The Common Outcome Plan (COP) 'drawer' contains tabs for each part of the COP.



The Common Outcome Plan is a case practice tool that allows staff to efficiently enter and use an Albertan's information. It contains:

Information	Type of Information
Assessment Information	The <i>Needs Identification (NI)</i> and <i>Common Holistic Assessment (CHA)</i> include the individual's or family's circumstances, needs, strengths, barriers, underlying causes, and supports.
Planning Information	The <i>Outcome Plan</i> contains the individual or family's <i>Vision, Goals and Actions</i> .
Support Network	The <i>Support Network</i> contains the contact information for the Albertan's natural and external supports.
Contact Log	The <i>Contact Log</i> is used to record information from interactions that does not fit within assessment, planning, or support network sections.

Can I view the Common Outcome Plan and PDD Outcome Plan?

All program staff and service providers with Mobius access can view an Albertan's Common Outcome Plan or PDD Outcome Plan. However, your role will determine whether or not you can enter/edit information in either section.

At this time, Family Supports for Children with Disabilities (FSCD) and Assured Income for the Severely Handicapped (AISH) staff do not regularly use Mobius, however, some staff do have access. If an Integrated Case Manager from Alberta Supports requests that an AISH or FSCD staff member be part of a Support Network, the AISH or FSCD worker should request a summary of the Albertan's current circumstances from that Integrated Case Manager.

How do I access
the CCISD Case
information?

When you select the *Cases* tab, within the Albertan’s Mobius file, there will be a CCISD Case and:

- a) A *PDD Outcome Plan* if the Albertan has been involved with PDD. To view the PDD Outcome Plan, select the *Case Reference* number beside the *PDD Outcome Plan*. Open each tab to view information.

Cases: joe albertan - 7444446533					
Cases	Case Reference	Type	Owner	Member Type	Start Date
Service Plans	b 6254337	Common Outcome Plan	Jennifer Chappell	Member	Nov-20-2018
	6254396	CCISD Case	Jennifer Chappell	Primary Client	Nov-20-2018
	a 6264843	PDD Outcome Plan	Kathy Jacobs	Member	Jan-22-2019

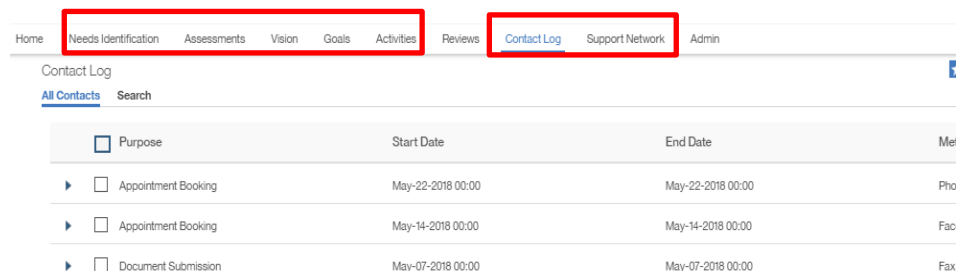
*image has been cropped to fit page

- b) A *Common Outcome Plan* if the Albertan has been involved with Alberta Supports. To view the Common Outcome Plan, select the *Case Reference* number beside the *Common Outcome Plan*. See below for more information.

The Common Outcome Plan (COP)

How do I read the Common Outcome Plan information?

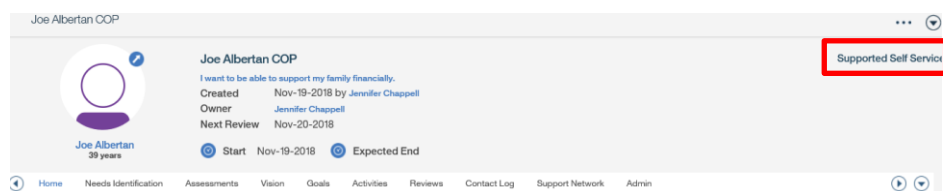
Each section of the Common Outcome Plan stores information by date. A review of the most recent assessment, planning information, and *Contact Log* is advisable. This information will help you understand the Albertan's needs, what support has been provided, and inform your decision making processes. *Support Network* information can be viewed as needed.



Purpose	Start Date	End Date	Me
Appointment Booking	May-22-2018 00:00	May-22-2018 00:00	Photo
Appointment Booking	May-14-2018 00:00	May-14-2018 00:00	Face
Document Submission	May-07-2018 00:00	May-07-2018 00:00	Fax

Review the top right corner of the context panel:

- 'Supported Self Service': the Albertan is not currently working with an Integrated Case Manager. At minimum, their COP will contain a Needs Identification.
- 'Case Management': the Albertan is currently working with an Integrated Case Manager. In addition to a Needs Identification, they may have a Common Holistic Assessment and Outcome Plan components.



How can I learn more about the Common Outcome Plan?

The policies within the [Alberta Supports Operating Manual](#) explain the purpose of, and information collected in, the assessments and planning components. The [Mobius User Guide](#) is being updated to include this information-stay tuned! Both of these resources are available on the Alberta Supports [InfoHub](#).

Common Outcome Plan: Assessment Information

What assessment information is available?

There are two types of assessments that may be found: a *Needs Identification* and a *Common Holistic Assessment*.

A *Needs Identification (NI)* is a high level assessment related to an individual or family's current circumstances.

A *Common Holistic Assessment (CHA)* is a more detailed assessment of the individual or family's current circumstances, completed by the Integrated Case Manager. The *CHA* often takes time to complete and may occur over multiple interactions; therefore, the *CHA* may appear to be in progress.

How does assessment information help me in my job?

Using the information found in the assessments allows you to spend more time working with the Albertan instead of collecting duplicate information.

The chart below lists some potential applications for the assessment information:

Program Area	How you could use the assessment information?
PDD	The <i>Needs Identification</i> and <i>Common Holistic Assessment</i> information could be used for eligibility determination, service design, or completion of the PDD Outcome Plan.
Alberta Works	The <i>Needs Identification</i> and <i>Common Holistic Assessment</i> information could be used when completing your Service Needs Determination or Employability Assessment.
All programs and service providers	The <i>Needs Identification</i> and <i>Common Holistic Assessment</i> information provides an overview of the Albertan's circumstances. The assessments could indicate what supports are already in place for the individual or family, and what referrals or connections have already been provided.

Where can I find the assessments?

1. Select the *Common Outcome Plan*, as [described above](#).
2. To view the NI, select the *Needs Identification* tab. Select the toggle beside an NI entry to see the information collected within that NI.

The screenshot shows the 'joe albertan COP' interface. At the top, there's a profile card for 'joe albertan' with a 'My vision is here.' link. Below this, a navigation bar includes 'Home', 'Needs Identification' (highlighted with a red box), 'Assessments', 'Contributors', 'Vision', 'Goals', 'Objectives', 'Activities', 'Workspace', and 'Reviews'. The 'Needs Identification' tab is active, displaying a table with the following data:

Type	Date	Completed By	Pathway	Copied to CHA
Needs Identification	Nov-21-2018 10:39	jennifer.chappell	Case Management	No

3. To view the CHA:
 - A) From within the Common Outcome Plan, select the *Assessments* tab. Select the *Common Holistic Assessment* hyperlink to open the assessment.

The screenshot shows the 'joe albertan COP' page. The 'Assessments' tab is selected and highlighted with a red box. Below the tabs, the 'Common Holistic Assessment' link is highlighted with a red box. The assessment details show it was created on Nov-20-2018 by Jennifer Chappell, with a next review on Nov-21-2018. The assessment is titled 'Common Holistic Assessment' and is associated with 'joe albertan'.

Type	Clients	Assessed
Common Holistic Assessment	joe albertan	Nov-20-2018 by Jennifer Chappell

- B) Within the opened *Common Holistic Assessment*, select the *Answers* tab to view the collected information.

The screenshot shows the 'Common Holistic Assessment - 6254339' page. The 'Answers' tab is selected and highlighted with a red box. The assessment details show it was created on Nov-20-2018 by Jennifer Chappell, with a next assessment on Nov-20-2018 by Jennifer Chappell. The assessment is titled 'Common Holistic Assessment - 6254339' and is associated with 'joe albertan'.

Question	Client	Answer
Housing Access to safe shelter	joe albertan	Yes
Transportation Access to a means of transportation that enables the individual or family to meet their basic needs and daily functioning (i.e. a means of transportation to get one's children to school)	joe albertan	Yes
Food / Household Essentials Access to adequate food, clothing, household supplies, and furnishings	joe albertan	Yes
Personal Safety Freedom from physical and psychological harm including financial, emotional, sexual, spiritual and verbal abuse	joe albertan	No

Joe is renting a basement suite v behind on his rent and is not sure

Common Outcome Plan: Planning Information

What planning information is available?

If an individual or family has worked with an Integrated Case Manager they may have planning information within the Common Outcome Plan (Vision, Goals, and Actions).

How does the planning information help me in my job?

The planning information helps you understand the goal or outcome that the individual or family is attempting to work towards. You can see what actions are underway to help them achieve their goals. This enables you to align and coordinate program supports and services appropriately.

All programs and service providers would benefit from reviewing the planning information in the Common Outcome Plan. The Vision, Goals, and Actions recorded in the Common Outcome Plan can be reviewed to ensure that there is alignment of vision across all plans and to clarify how other services support the individual/family and identify how supports can be coordinated.

Where can I find planning information in the Common Outcome Plan?

1. Select the *Common Outcome Plan*, as [described above](#).
2. To view the vision, either select the *Vision* tab (a) or read the vision displayed in the context panel below the individual's name (b).

joe albertan COP

joe albertan COP

Created Nov-20-2018 by Jennifer Chappell

Owner Jennifer Chappell

Next Review Nov-21-2018

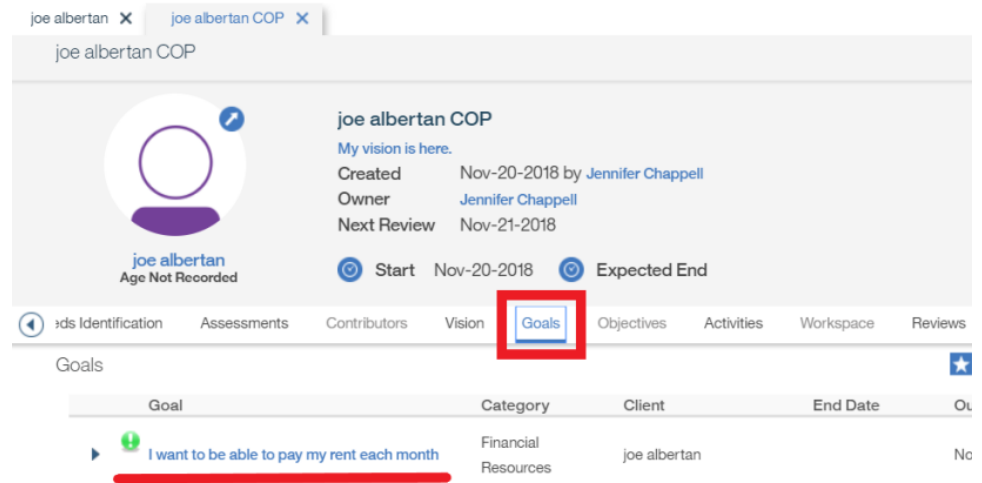
Start Nov-20-2018 Expected End

Home Needs Identification Assessments Contributors **Vision** Goals Objectives

Vision

Vision	Client	Creation Dat
My vision is here.	All	Nov-20-2018

- To view the goals, select the *Goals* tab. A goal with a green exclamation point next to it indicates a priority goal.



joe albertan COP

My vision is here.

Created Nov-20-2018 by Jennifer Chappell

Owner Jennifer Chappell

Next Review Nov-21-2018

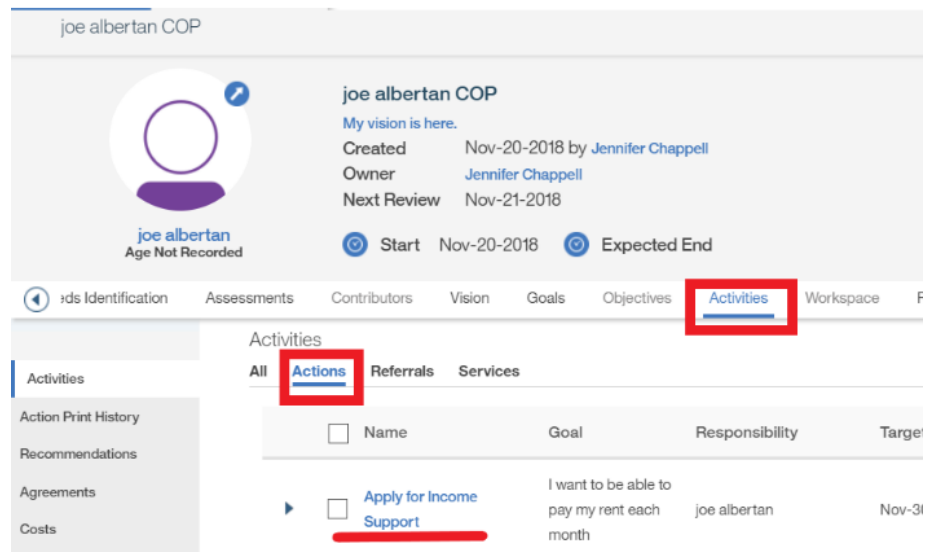
Start Nov-20-2018 Expected End

Goals Identification Assessments Contributors Vision **Goals** Objectives Activities Workspace Reviews

Goals

Goal	Category	Client	End Date	Out
I want to be able to pay my rent each month	Financial Resources	joe albertan		No

- To view the actions included for a specific goal, select the *Activities* tab. It will automatically open the *Action* sub-tab.



joe albertan COP

My vision is here.

Created Nov-20-2018 by Jennifer Chappell

Owner Jennifer Chappell

Next Review Nov-21-2018

Start Nov-20-2018 Expected End

Goals Identification Assessments Contributors Vision Goals Objectives **Activities** Workspace F

Activities

All **Actions** Referrals Services

Name	Goal	Responsibility	Target
Apply for Income Support	I want to be able to pay my rent each month	joe albertan	Nov-31

- When the goal or action is clicked the last progress status and last progress notes can be viewed in the *Outcome* and *Notes* rows.

Progress Details

Outcome	In Progress
Reason Not Achieved	
Notes	Joe has completed a resume and is starting to job search.

- To view the progress history and all progress notes, click the *Progress* sub tab. All *Notes* entered regarding the goal/action progress can be viewed here.

Date	Recorded By	Outcome	Reason Not Achieved	Note
Nov-20-2018	Jennifer Chappell	Not Started		
Nov-21-2018	Jennifer Chappell	In Progress		Joe has completed a resume and is starting to job search.
Jan-02-2019	Kathy Jacobs	In Progress		Joe has submitted 12 resumes and has 2 interviews next week Company as a forklift operator and Jan 8 interview with CDE C laborer

- To view the plan components as a complete *Outcome Plan*, click the “...” at the top right of the page and select *View Printable Document*. This will load a PDF for viewing and printing.

View Printable Document...

Common Outcome Plan: Support Network Information

What information is available about an Albertan's existing supports?

An individual or family may already have professional and/or natural supports that they rely on to help them achieve their goals. The *Support Network* contains the contact information of these supports. It will include any supports involved with that individual or family.

How does the Support Network information help me in my job?

Program Area	How to Use Information
PDD	<i>Support Network</i> information could be useful when determining if there are supports for planning. Contact information for guardians and trustees involved with the individual may be available.
Alberta Works	<i>Support Network</i> information can help with the completion of the <i>Service Plan</i> (need for interpreter or representative), as well as understanding how the individual is connected to other programs and community supports.
All programs and service providers	<i>Support Network</i> information aids in arranging case conferences or consultations and ensures appropriate supports are included.

Where can I find the Support Network information?

1. Select the *Common Outcome Plan*, as [described above](#).
2. Select the *Supports Network* tab. Select the *Current Members* tab. Select the toggle next to the member's name to view their detailed contact information. The person symbol beside Jane Doe's name, below, indicates that she is the support network lead.

The screenshot shows the 'joe albertan COP' page. The 'Support Network' tab is selected and highlighted with a red box. Under 'Support Network', the 'Current Members' sub-tab is also highlighted with a red box. A table lists members, with 'Jane Doe' highlighted by a red box. To the left of her name is a person icon with a red box around it. Below the table, the 'Details' tab is selected, showing Jane Doe's contact information.

Member Name	Role	Agency	Email	From
Jane Doe	Caseworker	Children's Services	jane.doe@unknow n.ca	Nov-21-2018

Details		Roles	
Title		First Name	Jane
Last Name	Doe	Role	Caseworker
Agency	Children's Services	Status	Active

Common Outcome Plan: Contact Log Information

What information is available in the Contact Log?

The *Contact Log* is used to record information from interactions that does not fit within the *Needs Identification (NI)*, *Common Holistic Assessment (CHA)*, or *Plan Vision, Goals or Actions*. This includes information such as:

- Address Change
- Application
- Appointment Booking
- Alberta Supports Coordinator (ASC) Contact
- Case Consult
- Case Manager (CM) Contact
- Document Submission
- General Inquiry
- Missed Appointment
- Multi-Disciplinary Team
- No Contact
- Referral
- Urgent Need

How does the Contact Log information help me in my job?

The *Contact Log* entries supplement the information captured elsewhere (NI, CHA, Vision, Goals, Actions) and may contribute to your understanding of the Albertan's day to day interactions.

Where can I find the Contact Log information?

1. Select the *Common Outcome Plan*, as [described above](#)
2. Select the *Contact Log* tab. If needed, select the appropriate column header to sort the *Contact Logs*. Select the toggle next to the entry you wish to view.

Home	Needs Identification	Assessments	Vision	Goals	Activities	Reviews	Contact Log	Support Network	Admin
Contact Log									
All Contacts Search									
<input type="checkbox"/>	Purpose	Start Date		End Date		Method			
▶ <input type="checkbox"/>	Appointment Booking	May-22-2018 00:00		May-22-2018 00:00		Phone			
▶ <input type="checkbox"/>	Appointment Booking	May-14-2018 00:00		May-14-2018 00:00		Face to			
▶ <input type="checkbox"/>	Document Submission	May-07-2018 00:00		May-07-2018 00:00		Fax			
▶ <input type="checkbox"/>	Appointment Booking	Apr-13-2018 00:00		Apr-13-2018 00:00		Phone			
▶ <input type="checkbox"/>	Appointment Booking	Apr-09-2018 00:00		Apr-09-2018 00:00		Phone			
▶ <input type="checkbox"/>	Application	Apr-05-2018 00:00		Apr-05-2018 00:00		Phone			