

Poverty: A Clinical Tool for Primary Care Providers | User's Guide for Ocean & Telus PSS

About the Ocean & Telus PSS EMR-Integrated Toolkit

The Centre for Effective Practice's Poverty: A Clinical Tool for PCPs custom-built Ocean and Telus PSS integrated toolkit leverages the Ocean tablet/kiosk technology to deliver patients with a validated poverty screening question and, if applicable, related follow up questions that automatically generates and populates a Telus PSS custom form with tailored advice, resources and services.

Incorporating the Toolkit Into Your Daily Practice

1. If your site has set up the tablet rule to automatically deliver the Screening Questionnaire (see Step 2 of the Set-Up Guide), all patients that meet the criteria will be asked to complete the Screening Questionnaire at check-in.

Tips for Administration of the Screening Questionnaire

Handling patient questions about the questionnaire:

- We have provided below an information sheet for patients that can be used to answer any questions that they may have about the purpose of the questionnaire or why they have been asked to participate.

For patients who decline the tablet (or are not eligible, e.g. language barrier)

- *Note: If you are using kiosks in your clinic, this will not apply. If patient declines the tablet all together, reception / admin / provider who has offered the tablet should indicate "prefer not to answer" on the patient's questionnaire.*



CEP Patients

There are many types of income benefits available to Canadians, and improving income can help improve health. We are asking all patients at this clinic to complete the following survey. By answering these questions, you can help your provider determine if there are income benefits and supports that you may be eligible for.

Participation is optional and your answers will not impact your usual standard of care.

Do you ever have difficulty making ends meet at the end of the month? ☒ Yes ☐ No ☐ Don't know ☐ Prefer not to answer

Have you filled out and sent in your income tax forms for the last year? ☐ No ☐ Yes ☐ Not Sure

Are you a parent or legal guardian to children under 18 years of age? ☐ No ☐ Yes

Are you a person of Indigenous heritage/descent/ancestry, that is, First Nations, Inuit, or Métis? ☐ No ☐ Yes

Are you a social assistance recipient (e.g. Ontario Disabilities Support Program, Ontario Works, etc.)? ☐ No ☐ Yes ☐ Not Sure

Do you live with a mental or physical disability? ☐ No ☐ Yes

Do you have any other concerns about income that you would like to ask your provider?

2. Based on the patient's responses to the Screening Questionnaire a set of recommended interventions, patient resources, services, etc. is automatically generated in a new Telus PSS encounter titled, CEP Providers – Poverty – A Clinical Tool for PCPs.

3. Use the "Activities Completed by Provider" and "Notes" section to record all actions taken during the patient's visit.

☐ Nov 21, 2018 CEP Providers - Poverty - A Clinical Tool for PCPs PSM

CEP Providers
Poverty: A Clinical Tool for Primary Care Providers [Collapse Form](#)

This patient was screened for poverty and indicated that they have difficulty making ends meet.

Intervening can have a profound impact on your patients' health.

1. Educate & Intervene

TAX RETURNS: Your patient does not know whether they have filled out and/or sent their income tax forms this year. Tax returns are required to access many income security benefits and programs. You may wish to explore this further with your patient to determine if intervention is appropriate.

Intervene: Connect your patients to [Free Community Tax Clinics](#).

Drug Coverage: Up-to-date tax filing is required to access Trillium plan for those without Ontario Drug Benefits. To help your patients with high prescription drug costs, [click here](#).

SOCIAL ASSISTANCE: Your patient is not a social assistance recipient. Social assistance programs include [Ontario Works](#) and [Ontario Disability Support Program](#). **Intervene:** Consider discussing with patient, or speak with patient's social service worker, to determine what benefits/social assistance the patient may be eligible for. See the [The Poverty Tool](#) for more information.

INDIGENOUS STATUS: Your patient identifies as Indigenous (First Nations, Inuit, or Metis). You may wish to explore this further with your patient to determine if intervention is appropriate.

For example, Indigenous peoples registered under the Indian Act or recognized by the Inuit Land Claim organization can qualify for [Non-Insured Health Benefits \(NIHB\)](#) which pays for drugs and extended health benefits not covered by provincial plans.

Intervene: Use [Canada Benefits](#) website with patients to identify and access income supports for patients and families.

DISABILITY: Your patient does not indicate a mental or physical disability.

CHILD BENEFITS: Your patient is not a parent or legal guardian to children under 18 years of age.

2. Follow-Up

☐ I would like to be reminded at the next patient's visit to follow-up.

Activities Completed by Provider

☐ I referred my patient to a specific income support/benefit.

☐ I had a discussion with my patient regarding resources and supports.

☐ I connected my patient with (eg. Social Services Worker):

Notes

☐ Nov 21, 2018 CEP Providers - Poverty - A Clinical Tool for PCPs PSM

CEP Providers
Poverty: A Clinical Tool for Primary Care Providers [Collapse Form](#)

This patient was screened for poverty and indicated that they have difficulty making ends meet.

Intervening can have a profound impact on your patients' health.

1. Educate & Intervene

TAX RETURNS: Your patient does not know whether they have filled out and/or sent their income tax forms this year. Tax returns are required to access many income security benefits and programs. You may wish to explore this further with your patient to determine if intervention is appropriate.

Intervene: Connect your patients to [Free Community Tax Clinics](#).

Drug Coverage: Up-to-date tax filing is required to access Trillium plan for those without Ontario Drug Benefits. To help your patients with high prescription drug costs, [click here](#).

SOCIAL ASSISTANCE: Your patient is not a social assistance recipient. Social assistance programs include [Ontario Works](#) and [Ontario Disability Support Program](#). **Intervene:** Consider discussing with patient, or speak with patient's social service worker, to determine what benefits/social assistance the patient may be eligible for. See the [The Poverty Tool](#) for more information.

INDIGENOUS STATUS: Your patient identifies as Indigenous (First Nations, Inuit, or Metis). You may wish to explore this further with your patient to determine if intervention is appropriate.

For example, Indigenous peoples registered under the Indian Act or recognized by the Inuit Land Claim organization can qualify for [Non-Insured Health Benefits \(NIHB\)](#) which pays for drugs and extended health benefits not covered by provincial plans.

Intervene: Use [Canada Benefits](#) website with patients to identify and access income supports for patients and families.

DISABILITY: Your patient does not indicate a mental or physical disability.

CHILD BENEFITS: Your patient is not a parent or legal guardian to children under 18 years of age.

2. Follow-Up

☐ I would like to be reminded at the next patient's visit to follow-up.

Activities Completed by Provider

☐ I referred my patient to a specific income support/benefit.

☐ I had a discussion with my patient regarding resources and supports.

☐ I connected my patient with (eg. Social Services Worker):

Notes

4. If you're unable to address all recommended interventions during the patient's visit and/or you want to revisit the form at the patient's next visit, select the "I would like to be reminded at the next patient's visit to follow-up" checkbox to set a reminder.

Nov 21, 2018 CEP Providers - Poverty - A Clinical Tool for PCPs PSM

CEP Providers
Poverty: A Clinical Tool for Primary Care Providers [Collapse Form](#)

This patient was screened for poverty and indicated that they have difficulty making ends meet.

Intervening can have a profound impact on your patients' health.

1. Educate & Intervene

TAX RETURNS: Your patient does not know whether they have filled out and/or sent their income tax forms this year. Tax returns are required to access many income security benefits and programs. You may wish to explore this further with your patient to determine if intervention is appropriate.

Intervene: Connect your patients to [Free Community Tax Clinics](#).

Drug Coverage: Up-to-date tax filing is required to access Trillium plan for those without Ontario Drug Benefits. To help your patients with high prescription drug costs, [click here](#).

SOCIAL ASSISTANCE: Your patient is not a social assistance recipient. Social assistance programs include [Ontario Works](#) and [Ontario Disability Support Program](#).

Intervene: Consider discussing with patient, or speak with patient's social service worker, to determine what benefits/social assistance the patient may be eligible for. See the [Poverty Tool](#) for more information.

INDIGENOUS STATUS: Your patient identifies as Indigenous (First Nations, Inuit, or Metis). You may wish to explore this further with your patient to determine if intervention is appropriate.

For example, Indigenous peoples registered under the Indian Act or recognized by the Inuit Land Claim organization can qualify for [Non-Insured Health Benefits \(NIHB\)](#) which pays for drugs and extended health benefits not covered by provincial plans.

Intervene: Use [Canada Benefits](#) website with patients to identify and access income supports for patients and families.

DISABILITY: Your patient does not indicate a mental or physical disability.

CHILD BENEFITS: Your patient is not a parent or legal guardian to children under 18 years of age.

2. Follow-Up

☒ I would like to be reminded at the next patient's visit to follow-up

Activities Completed by Provider

☐ I referred my patient to a specific income support/benefit

☐ I had a discussion with my patient regarding resources and supports

☐ I connected my patient with (eg. Social Services Worker): _____

Notes

Reminders

Poverty: A Clinical Tool for PCPs

Needs Pap

Evaluating the Intervention

For all patient's screened for Poverty using the Ocean & Telus PSS EMR-Integrated Toolkit a searchable @PovertyScreen custom vital indicator is attached to the patient's record. This allows you to run a search to determine the denominator (the total number of patients screened) as well as the number of patients that screened positive, negative and those that opted-out of participating in the intervention.

- **@PovertyScreen: 1** - Patients that screened positive (i.e. answered "Yes" to the screening question).
- **@PovertyScreen: 2** - Patients that screened positive (i.e. answered "No" to the screening question).
- **@PovertyScreen: 3** - Patients that could not answer (i.e. answered "Don't know" to the screening question).
- **@PovertyScreen: 4** - Patients that opted-out (i.e. answered "Prefer Not to Answer" to the screening question).

About the NEW tablet questionnaire:

Improving your income may improve your health!

- There are many types of income benefits available to Canadians, and improving your income can improve your health.
- We are asking all patients at this clinic to answer a short questionnaire in the waiting room.
- By answering a few questions, you can help your healthcare provider determine if there are income benefits and supports that you are eligible for.
- Participation is optional and your answers will not impact your usual care.

FAQs about the questionnaire:

Q: Am I required to complete this questionnaire?

A: No. The questionnaire is optional and choosing not to complete the questionnaire will not impact your care.

Q: Why am I being asked these questions?

A: By answering a few questions, you can help your healthcare provider determine if there are income benefits and supports that you are eligible for.

Q: What will happen after I answer these questions?

A: Your healthcare provider may discuss some of your answers with you. Your healthcare provider may provide you with a list of resources that has been made for you.

Q: Is this questionnaire for all patients?

A: Yes. We are asking all patients to complete this questionnaire.

Q: Do I need to answer all questions? What if I'm not sure about the answers?

A: You do not need to complete all questions. Complete as many questions as you are comfortable with.

Q: How many questions are there?

A: Depending on your answers, you will be asked to answer between 1 and 8 questions.

Q: How long will it take?

A: The questionnaire should take less than 5 minutes.

