

## Poverty: A Clinical Tool for Primary Care Providers | User's Guide for Ocean

### About the Ocean Integrated Toolkit

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

### 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.



The screenshot shows the CEP Patients Screening Questionnaire on a tablet. The header includes the CEP logo and the title "Patients". The main text explains that the questionnaire is optional and aims to help improve health by identifying income benefits and supports. The questions are as follows:

- Do you ever have difficulty making ends meet at the end of the month? (Buttons: Yes, No, Don't know, Prefer not to answer)
- Have you filled out and sent in your income tax forms for the last year? (Buttons: No, Yes, Not Sure)
- Are you a parent or legal guardian to children under 18 years of age? (Buttons: No, Yes)
- Are you a person of Indigenous heritage/descent/ancestry, that is, First Nations, Inuit, or Métis? (Buttons: No, Yes)
- Are you a social assistance recipient (e.g. Ontario Disabilities Support Program, Ontario Works, etc.)? (Buttons: No, Yes, Not Sure)
- Do you live with a mental or physical disability? (Buttons: No, Yes)
- Do you have any other concerns about income that you would like to ask your provider? (Text input field)

At the bottom right, there are "Cancel" and "Save" buttons.

- Based on the patient's responses to the Ocean Screening Questionnaire a set of recommended interventions, patient resources, services, etc. is automatically generated that: (1) automatically pushes to integrated and connected EMRs (i.e. Accuro QHR or OSCAR); or (2) can be copy + pasted into your EMR, printed, pdf-ed, etc.



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@PovertyScreen: 1

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Pippy Scott-Meuser  
EMR # 109  
DOB: Jan 20, 1986

This patient was screened for poverty and indicated that they HAVE DIFFICULTY making ends meet

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

**TAX RETURNS:** Your patient has not filled out and/or sent in 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. Follow this link: <http://www.cra-arc.gc.ca/tx/ndvdl/vlnt/clincs/on-eng.html>

**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, follow this link: <https://www.ontario.ca/page/get-help-high-prescription-drug-costs>

**DISABILITY:** Your patient indicates a disability/disabilities

Major disability programs available include ODSP, CPP Disability, EI Sickness, Disability Tax Credit (DTC), Veterans Benefits, WSIB, Employers' long term protection, Registered Disability Savings Plan (RDSP).

**Intervene:** Use a detailed social and medical history to determine the programs to which you can connect your patients.

Complete forms such as:

- Canada Revenue Agency Form T2201 (i.e. Disability Tax Credit): DTC can provide up to ~\$1,800/year in tax savings (plus retroactive payments) and is required to receive other benefits including the RDSP, which provides up to \$20,000 in grants.
- ODSP Application (Bill K050; \$100): provide as much information as possible, emphasizing the impact of a person's disability on their social, occupational and self care functioning.

**SOCIAL ASSISTANCE:** Your patient is a social assistance recipient

Discuss with patient, or speak with patient's social service worker, to determine what benefits they are currently on. Additional benefits available include: transportation, medical supplies, special diet, employment supports, drug & dental, vision, hearing, ADP co-payment, women in transition interval houses, Advanced Age Allowance, community participation, and other discretionary benefits.

**Intervene:** Complete forms such as:

- Mandatory Special Necessities Benefits Application (Bill K054; \$25): medical supplies and health related transportation;
- Special Diet Allowance (Bill K055; \$20): funds for special dietary needs

**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. Follow this link: <http://www.canadabenefits.gc.ca/>

## Evaluating the Intervention

For all patient's screened for Poverty using the Ocean Integrated Custom 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 survey 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.

