

Community Accountability Planning Submission (CAPS)

A Step by Step User Guide for completion of the 2014-2017 CAPS

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Introduction

The LHIN *Community Accountability Planning Submission User Guide* is developed to take you step by step through the completion of the LHIN Managed 2014-17 Community Accountability Planning Submission (CAPS). The instructions will also apply to the Ministry Managed 2014-17 CAPS.

Please note, the timeframe to complete and return your 2014-17 CAPS is tight. Health Service Providers are expected to make all necessary arrangements to prepare for the immediate completion of their CAPS following the launch date to SRI on October 1, 2013 and are expected to submit the CAPS by November 15, 2013.

What is CAPS?

The CAPS is divided into two distinct Parts with 4 components in total. The Health Service Provider (HSP) will submit Part A, by email directly to the LHIN. Part A is available on the LHIN Website effective October 1, 2013. Part B will be available to the HSP on the Self Reporting Initiative (SRI) on October 1, 2013. The following table summarizes the 2 Parts and 4 components of CAPS:

Part A: file will be available on LHIN website effective October 1, 2013		
A1. Service Plan Narrative	This worksheet tab allows you to tell the LHIN about the services you provide with LHIN Funding and some additional detail related to those services. This narrative <u>will not</u> be included in the final M-SAA agreement.	Not in Final MSAA
A2. Description of Services	This is the same form from the last CAPS where the HSP will provide information about where they provide services. (Intra and Inter LHIN). This information will be used to populate Schedule A1 in the M-SAA agreement.	In Final MSAA
A3. Population and Geography Narrative	This is the existing form from the last CAPS where the HSP's provided Population and Geography Narratives. This information will be used to populate Schedule A2 in the M-SAA Agreement	In Final MSAA
Part B: file must be downloaded by HSP from SRI effective October 1, 2013		
B1. CAPS File from SRI	Downloaded from SRI and submitted to SRI by the 15 th of November. This file contains the HSP's Financial and Activity plans for 2014-2017.	CAPS file from SRI

The Use of SRI

There are several steps that have been put together to help your organization with the "Checking Out" and "Checking In" of the CAPS from SRI. Please register yourself immediately with SRI to allow for successful access to your file on October 1, 2013. However, if there are any issues with access to the website or acquiring or submitting the file, please contact SRI immediately at:

sri@ontario.ca
1-800-495-9986

Other Information:

Further information in regards to definitions of financial and statistical accounts for your subsector can be found in the Ontario Healthcare Reporting Standards (OHRS) which is located on the Health Data Branch web site, <https://hsimi.on.ca/hdbportal/>. Instructions on accessing to this will be available on the main page. You should also be familiar with your 2011/14 Multi-Sector Service Accountability Agreement (M-SAA).

Key Enhancements to the 2014-17 CAPS

Following the last CAPS and M-SAA process the LHINs sought feedback from the HSPs as well as the LHINs on how to improve on the overall process. As a result of the feedback, the following enhancements were made to the 2014-17 CAPS by the LHIN SRI Working Group:

- 2013-14 CAPS budget information is automatically loaded into the forms. No need to load additional files.
- Clinical information from Community Healthcare Centre's asked for in prior CAPS submissions have been replaced with OHRS compliant reporting on the Service Activity Page.
- New lines have been added to the Identification page to allow for communication of contact changes for several positions in the organization.
- Additional lines have been added to the finance screens to provide new calculations and a further breakdown of information (Physicians, Physician Assistants, Nurse Practitioners, and Other Medical Staff) where applicable.
- The LHIN name is selected by the providers on the first page of the CAPS file.
- Administration FTE on the LHIN Service Summary screen is updated automatically from the Total FTE on the LHIN Financial Summary.
- Worked Hours and Benefit Hours have been combined on one line in CAPS to make the process easier for the providers. Benefit contributions remains a separate line entry.
- The schedules have been removed from the CAPS file.

Future Enhancements to the 2014-17 CAPS

Unfortunately, with every file there are limitations, therefore as many of the suggestions as possible were incorporated into the New CAPS tool and M-SAA for 2014-17.

Future enhancements to the CAPS will be potentially possible during the next refresh of the CAPS Tool

Before you get started

Before you begin completing your CAPS please review the “*Reference Overview*” document available to you through your LHIN.

The purpose of the Reference Overview document is to provide additional information to assist HSPs in the community sectors to complete their 2014-17 CAPS.

The Reference Overview document contains a section called “*Getting Started*”. Please read this section first and be aware of the important timelines that are identified to help you complete your CAPS and submit your CAPS to the LHIN by November 15, 2013.

Completing the CAPS

Part A1, A2 and A3 of the CAPS will be available to each HSP on the LHIN website on October 1, 2013 and the document will be due November 15, 2013

Completing Part A1: Service Plan Narrative

The CAPS Service Plan Narrative is an opportunity for the Health Service Providers to provide additional information to their LHIN for the fiscal years 2014-17.

Service Plan Narrative

1. Detailed Description of Services. Please list the Program Names of services your organization provides under the corresponding Functional Centre(s). Identify what percentage of current LHIN funding supports the program and list all programs services your organization provides even if the LHIN is funding 0% of the program presently and funding is from other sources

Example:

The "HSP" as per current M-SAA: <u>ABC Community Services</u>					
Functional Center Name- Code #	Program Name	Program Site(s) Address (Include #, Street Name, City, Province, PC)	Description of Service (Max 270 Character Limit)	% of LHIN funding that supports this Program Service	Other Funders %
Assisted Living Services- 72 5 82 45	The Safe Sleep Program	123 Service Street, Healthy, ON, L2T3V7	This service may include homemaking, personal support, attendant services and core components of independence training to clients who are living in a supportive housing setting or own residence and require assisted living services, accessible on a 24-hour basis.	80%	20%
Visiting and Social Safety- 72 5 82 60	The Check-in Program	456 Safe Street, Strong, ON, L2T 4B8 777 Social Way, Happy, ON L2C 5Y7	Volunteers deliver services to the client to check the health, safety and social needs of the client. The clients are isolated seniors or their significant others. The contact is through a phone call or face to face visit.	100%	0%
Meals Delivery- 72 5 82 10	Happy Meals	789 Happy Ave, Hungry, ON, L2T IM2	The meals are delivered by volunteers who also provide a regular social contact and check the health and safety of the client during visits.	50%	50%
N/A	A Helping Hand	411 Handy Street, Helping, ON, I2M 4U2	Assist clients living in home with shopping, light housekeeping, meal preparation, paying bills, caring for children and laundry and training the person to perform these activities.	0%	100%

2. Is your HSP associated with Health Links in one of these aspects? (Please check all that apply to your HSP)

Care Planning ☐
 Business Planning ☐
 Not at All ☐

If Not at All, please clarify, (Please check one, or explain)

Not yet Approached ☐
 Declined Participation ☐
 Other: (please explain) ☐

3. Are there potential partnership/integration opportunities between your organization and other organizations in the LHIN in the next 3 years to improve service delivery? If there are, please list up to three opportunities and potential partnerships, and what system service delivery improvement will be achieved as a result.

(Max 270 Character Limit per cell)

Potential Partnerships/Integrations Opportunities	Resulting System Improvement

4. Identify 3 potential risks to your organization and service delivery over the next 3 years, the level of potential risk and provide the mitigation strategies to manage each of the identified risks.

(Max 270 Character Limit per cell)

Type of Risk (i.e. Financial, Program, Operational, etc.)	Level of Potential Risk (High, Medium, Low)	Mitigating Strategy

Completing Part A2: Detailed Description of Services

This is the same form from the last CAPS where the HSP will provide information about where they provide services. (Intra and Inter LHIN). This information will be used to populate Schedule A1 in the M-SAA. Each LHIN will be able to pre-populate the Areas Within LHIN or provide HSP's with Area names to correspond with your LHIN.

Detailed Description of Services Narrative

Schedule A1:
Detailed Description of Services

Healthcare Service Provider: 0

Services Provided - With LHIN Funding	
Service	Catchment Area Served
	Within LHIN
	Other LHIN Areas
	Area 1 Area 2 Area 3 Area 4 Area 5 Area 6 Area 7 Area 8 Area 9 Area 10 ALL ES SW WWV HNHJB CWV MH TC CEN CE SE CH NS NE NW

Completing Part A3: Client Population and Geography Served Narrative

This is the existing form from the last CAPS where the HSP's provided Population and Geography narratives. This information will be used to populate Schedule A2 in the M-SAA.

Client Population: In this section provide a profile of client supported by your LHIN funded programs.

The *client profile* is simply a very clear description of the type of client you're supporting today, or it could be a combination of qualities you've seen in past and current clients.

Geography Served: In this section provide further detailed information on what your HSP identified in Part A2: Detailed Description of Services.

Population and Geography Narratives

Schedule A2:
Population and Geography

Healthcare Service Provider: 0

Client Population

Geography Served

Completing Part B1: Financial and Statistical Planning

Please find below a detailed step by step guide to help with the completion of Part B of the Community Accountability Planning Submission.

1. Go to <https://www.sri.moh.gov.on.ca/UserRegistration/faces/login/index.jsp>
2. If you are already registered, you can follow the **red** arrow and click **"SRI Submissions"**. If not, you can follow the **purple** arrow and click **"Register Here"**

SRI Submissions

Log in to create, review and approve submissions

Forgot your password

Forgot your password? (registered users only)

User Update Profile

Update your name, email address, registered facilities, etc

User Registration Administration

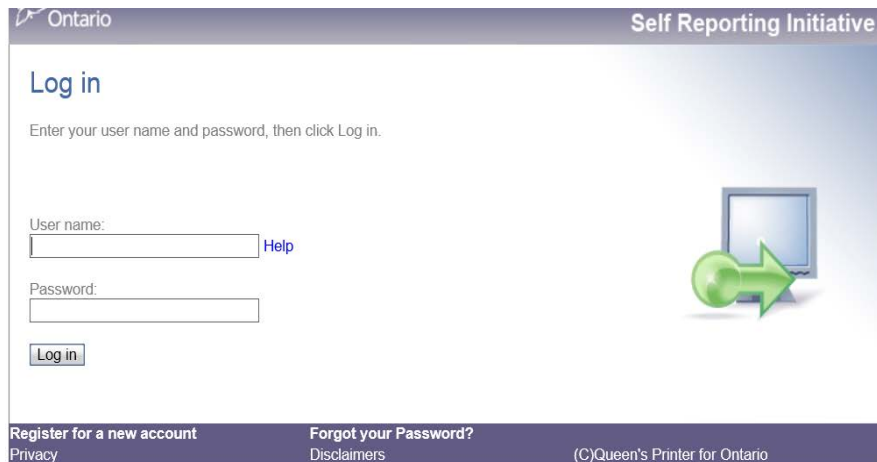
Access to the Administration Module (authorized internal OPS staff only)

Organization Search

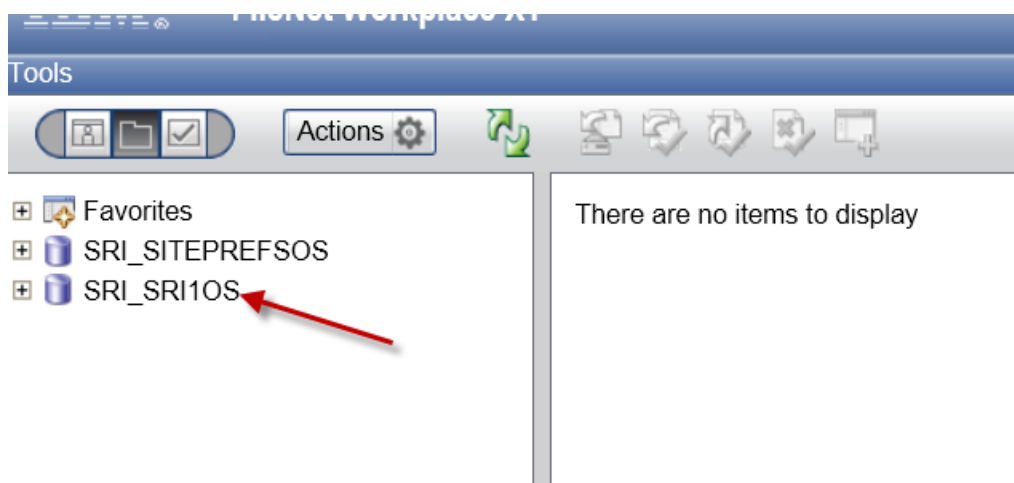
Search by SRI Health Facility Name or WERS Organization Name

Not Yet Registered? [Register Here](#)

3. Once you click on SRI Submissions, you can enter in your user name and password



4. Click **"SRI_SR10S"**



5. Double click **"2014-15"**

The screenshot shows a table with the following data:

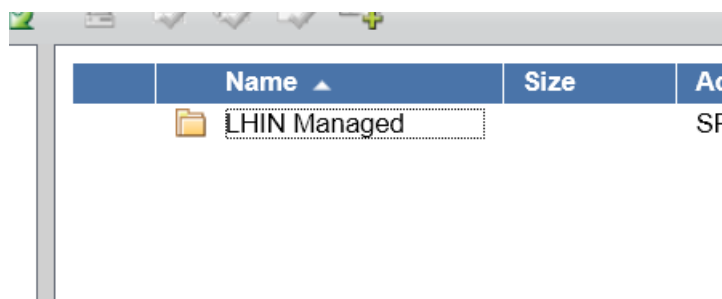
	Name ▲	Size	Added By	
	2009-10		SRI Admin	1
	2010-11		SRI Admin	1
	2011-12		SRI Admin	1
	2012-13		Filenet Administrator	3
	2013-14		SRI Admin	1
	2014-15		SRI Admin	8

6. Double click **"Community Sectors"**

The screenshot shows a table with the following data:

	Name ▲	Size	Added By
	Community Sectors		SRI Admin

7. Double click “**LHIN Managed**”



A screenshot of a file explorer window. The top toolbar shows icons for back, forward, and other navigation functions. Below the toolbar is a table with columns: Name, Size, and Action. A single row is visible, representing a folder named 'LHIN Managed'.

Name ▲	Size	Action
LHIN Managed		SP

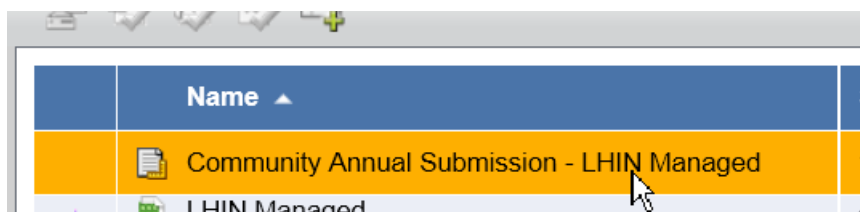
8. Double click “**Community Annual Submission (CAPS)**”



A screenshot of a file explorer window. The top toolbar shows icons for back, forward, and other navigation functions. Below the toolbar is a table with columns: Name, Size, and Action. A single row is visible, representing a folder named 'Community Annual Submission (CAPS)'.

Name ▲	Size	Action
Community Annual Submission (CAPS)		

9. Double Click “**Community Annual Submission – LHIN Managed**”



A screenshot of a file explorer window. The top toolbar shows icons for back, forward, and other navigation functions. Below the toolbar is a table with columns: Name, Size, and Action. Two rows are visible. The first row is highlighted in orange and represents a file named 'Community Annual Submission - LHIN Managed'. The second row represents a folder named 'LHIN Managed'.

Name ▲	Size	Action
Community Annual Submission - LHIN Managed		
LHIN Managed		

10. Select the drop down menu and click **“No Content”** and then go to the bottom right and select **“Next”**.



11. Then enter in your WERS number and select **“Next”**. If you do not know your WERS number, go to the home page of SRI and select **“Organization Search”** (you can go to the SRI Home page to find this link)

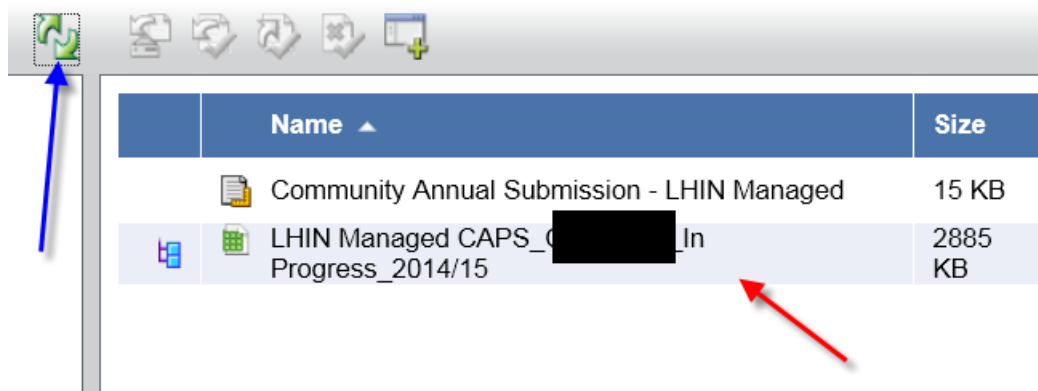
 Filename: None
Entry template: Community Annual Submission - LHIN Managed
☒ Location: SRI_SRI1OS. Change selection SRI_SRI1OS
☒ Class: SRI XLS Q2 Community. Change selection SRIXLS Q2 Community

Properties

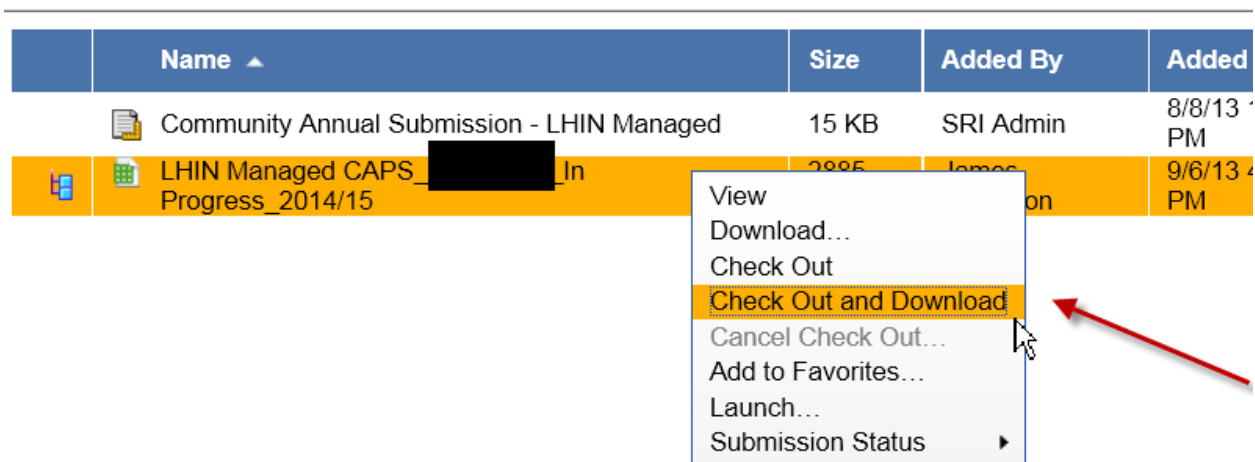
Document Title: Temp Community Annual Submission - LHIN Managed
SRI Reporting Year: 2014/15
SRI Submission Status: In Progress
SRI XLS Version: 8

* SRI WERS Org: SRI WERS Org. Required. WERS # here

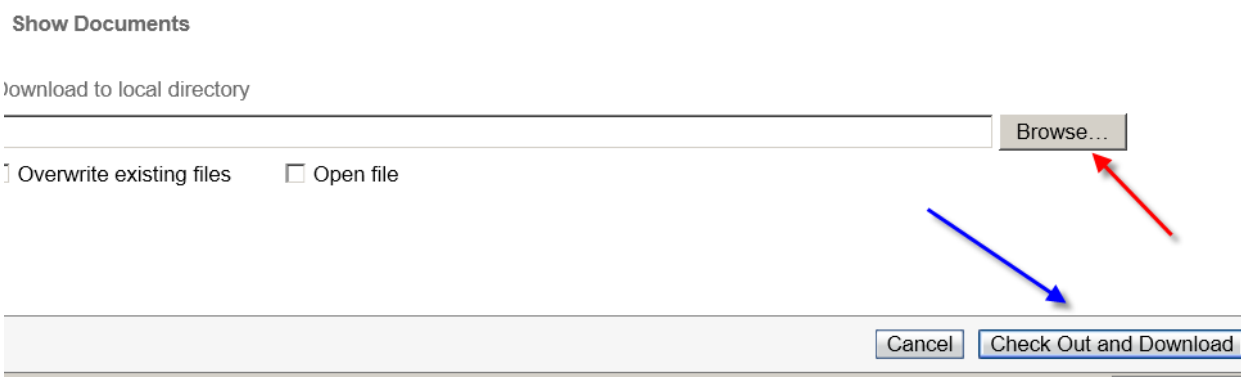
12. The **“LHIN Managed CAPS_XXX_In Progress_2014/15”** should appear. If it does not appear in five minutes, follow the blue arrow and select the **“Refresh”** button.



13. Right click on the “**LHIN Managed CAPS_XXXXXX_In Progress_2014/15**” and select “**Check Out and Download.**” Do not select the order “Download” or “Checkout” at this stage,



14. Now you will need to choose a place on your computer for where you want to save your file.
When you complete your file, you will need to Check Out and Download it back into SRI, so make sure you have it saved to a place that is easy to remember.
You can select “**Browse**” to find that location.
When done, you can select “**Check Out and Download**” (you should then receive a message stating...”Checked Out and Downloaded successfully” then click “**OK**”



Main Page

When the CAPS file is first launched the following Menu Page will display. This page provides links to each form contained within the CAPS.

**Community Accountability Planning Submission (CAPS)
LHIN MANAGED (SRI)**

Planning Period: **3 Year Plan: 2014-17**

LHIN: **Select a LHIN** 

INSTRUCTIONS: Please read the user guide prior to completing this file.
Complete your Community Information above before proceeding.
Use the Navigation Links provided below or click on the worksheet tabs

**Select Your LHIN
from the drop
down arrow**

[Identification](#)
[Financial & FTE Program Plans \(Financial/FTE Summary Page- Information Only\)](#)
 [\(CMHP1\) Community Mental Health - LHIN Managed Funding & FTE Planning](#)
 [\(ABI\) Acquired Brain Injury - LHIN Managed Funding & FTE Planning](#)
 [\(PG\) Problem Gambling - LHIN Managed Funding & FTE Planning](#)
 [\(SAP\) Substance Abuse Program - LHIN Managed Funding & FTE Planning](#)
 [\(POMS\) Psychiatric Outpatient Medical Salaries - LHIN Managed Funding & FTE Planning](#)
 [\(CMH\) Childrens Mental Health - LHIN Managed Funding & FTE Planning](#)
 [\(CSS\) Community Support Services - LHIN Managed Funding & FTE Planning](#)
 [\(PALC\) Palliative Care - LHIN Managed Funding & FTE Planning](#)
 [\(AO\) Attendant Outreach - LHIN Managed Funding & FTE Planning](#)
 [\(SH\) Supportive Housing - LHIN Managed Funding & FTE Planning](#)
 [\(CHC\) Community Health Centre - LHIN Managed Funding & FTE Planning](#)
 [\(CCAC\) Community Care Access Centre - LHIN Managed Funding & FTE Planning](#)
 [Extra1 \(Not Currently Used\)](#)
 [Extra2 \(Not Currently Used\)](#)
[Service Selection Page](#)
[Activity Planning Page](#)
[Verify the Edit Checks](#)

[LHIN Summary \(LHIN Use Only\)](#)

- This menu page in the CAPS document will allow users to navigate to different forms by clicking on the [links](#).
- Users can return to the main menu at any time by clicking on [Return to Main Page](#) at the top of each form contained in this file.

Note: The ID edit Check will fail if you don't "Select a LHIN" on the Main Menu

Identification

Below is an example of the Identification screen. Users will populate this screen with relevant information to the CAPS. LHINs will use this information during review to send inquiries about the submission.

- It is very important that Health Service Providers (HSP) complete all mandatory information on this form and ensure that it is as up to date as possible.
- All **yellow highlighted cells** are mandatory fields, indicated with **red** text.
- After completion, select [Return to Main Page](#) to continue with the next step.

Community Accountability Planning Submission (CAPS) LHIN Managed Funding
HSP Name: Canadian Mental Health Association, Thunder Bay Branch
3 Year Plan: 2014-17

IDENTIFICATION

[Return to Main Page](#)

* Mandatory Fields

Description	Details
*Facility No. (OHFS)	463
*Recipient # (IFIS #)	
*Period (Select on Main Page)	3 Year Plan: 2014-17
*LHIN Name (Select on Main Page)	Select a LHIN
*Service Provider Name	
*Service Provider Legal Name	
Service Provider Address	
*Address 1	
Address 2	
*City	
*Postal Code	
Executive Director/CEO	
*Name	
*Position Name	
*Telephone	
*Email	
Finance Contact	
*Name	
*Position Name	
*Telephone	
*Email	
Board Chair/Signing Authority	
*Name	
*Position Name	
*Telephone	
*Email	

Main / Edits / Identification / LHINFin_CMHP1 / LHINFin_ABI / LHINFin_PG / LHINFin_SAP / LHINFin_POMS / LHINFin_CMH / LHINFin_CSS

Completing the LHIN Managed Funding & FTE Planning form

Below you will see a screen shot of the LHIN-Managed Funding & FTE Planning form for the CMHP1 TPBE. Please note that the forms for all other TPBE(s) should be completed the same way.

Community Accountability Planning Submission (CAPS) LHIN Managed Funding

HSP Name:

3 Year Plan: 2014-17

(CMHP1) Community Mental Health - LHIN Managed Funding & FTE Planning

[Return to Main Page](#)

LHIN Program: Revenue & Expenses		(CMHP1) Community Mental Health - LHIN Managed Funding			
	2013-14 Budget (Historical)	2014-15 Plan Target	2015-16 Plan Target	2016-17 Plan Target	
Revenue					
LHIN Global Base Allocation	\$44	\$0	\$0	\$0	
HBAM Funding (CCAC only)	\$0	\$0	\$0	\$0	
Quality-Based Procedures (CCAC only)	\$0	\$0	\$0	\$0	
MOHLTC Base Allocation	\$48	\$0	\$0	\$0	
MOHLTC Other funding envelopes	\$52	\$0	\$0	\$0	
LHIN One Time	\$56	\$0	\$0	\$0	
MOHLTC One Time	\$60	\$0	\$0	\$0	
Paymaster Flow Through (Row 76)	\$0	\$0	\$0	\$0	
Service Recipient Revenue	\$68	\$0	\$0	\$0	
Subtotal Revenue LHIN/MOHLTC	\$328	\$0	\$0	\$0	
Recoveries from External/Internal Sources	\$76	\$0	\$0	\$0	
Donations	\$80	\$0	\$0	\$0	
Other Funding Sources & Other Revenue	\$84	\$0	\$0	\$0	
Subtotal Other Revenues	\$240	\$0	\$0	\$0	
TOTAL REVENUE	\$568	\$0	\$0	\$0	
EXPENSES					
Compensation					
Salaries (Worked hours + Benefit hours cost) (Row 91+104)	\$1,432	\$0	\$0	\$0	
Benefit Contributions (Row 92+105)	\$728	\$0	\$0	\$0	
Employee Future Benefit Compensation	\$112	\$0	\$0	\$0	

From the Main page, select the first Transfer Payment Business Entity (TPBE), that is LHIN-funded and complete the financial and FTE details. The FTE Planning section can be found below the Revenue & Expenses section.

Description of Columns

- **2013-14 Budget (Historical):** This value represents the prior year's budget. This information will be pre-populated from the HSP's 2013-2014 CAPS.
- **2014-15 Plan Target:** This value is the organization's Budget Target for the first year of the new M-SAA. Enter the LHIN/MINISTRY base revenue that you expect to receive based on your 2013-14 Payment Notice. Please include LHIN approved planning assumptions for one time revenue. Enter the remaining Revenue and Expense information for each TBPE that apply to your HSP.
- **2015-16 Plan Target:** This value is the organization's Budget Target for the second year of the new M-SAA. Enter the LHIN/MINISTRY base revenue that you expect to receive based on your 2013-14 Payment Notice. Please include LHIN approved planning assumptions for one time revenue. Enter the remaining Revenue and Expense information for each TBPE that apply to your HSP.
- **2016-17 Plan Target:** This value is the organization's Budget Target for the third year of the new M-SAA. Enter the LHIN/MINISTRY base revenue that you expect to receive based on your 2013-14 Payment Notice. Please include LHIN approved planning assumptions for one time revenue. Enter the remaining Revenue and Expense information for each TBPE that apply to your HSP.
- **Comments:** The Comments column should be used to explain differences between the budgets across the years indicated. The comments provide clarification and will help the LHIN understand why Reallocations/Budget changes are being made.

General instructions for completing the Revenue and Expenses section:

- The Total Revenues must Balance with the Total Expenses to pass the final edit check;
- Record the Administration Expenses that are included in the Fund Type 2 expenses on the Administration and Support Services line. This value will populate your Total Cost for the Administration and Services Functional Centre.
- If Paymaster agreements apply to your HSP, this information can be completed at the bottom of the form. If your HSP is the payer, the revenue should be recorded as negative. If your HSP is the payee, the revenue should be recorded as positive. The total Paymaster will transfer automatically to row 20.
- Salary and Benefit values are transferred automatically to rows 30-31 and 33-36 from the values entered in the FTE Planning at the bottom of the form. Instructions on how to complete this section can be found in Step 2.

General Instructions for completing the FTE Planning section

- The FTE Planning section is divided into 3 areas; Administration and Support Services, Direct Services, and Medical Staff Remuneration.
- Within each of the 3 areas, you will need to enter the following:
 - o FTE: The FTE is planned by program and subdivided by MOS and UPP FTE (reminder: 1FTE is equivalent to 1,950 hours)
 - o Hours Cost: Enter the planned costs for worked and benefit hours, and benefit contributions. These amounts entered will be automatically transferred to the Financial Planning section.
 - o Volunteers: If your HSP is supported by volunteers in Administration and Support Services, and/or Direct Services, enter the # of volunteers and the corresponding hours. This information is not used by the Financial Planning section.
- Once the form has been completed, return to the Main page and select the next TPBE as necessary and repeat until all financial and FTE information has been entered for all LHIN funded programs.
- Note the red triangles that appear in the upper right corners in the line description column (1st column) are comments that describe corresponding OHRS codes. To view the codes, hover your mouse over the desired line item as shown above. If the red triangles are not visible on your computer, click on the "Review Tab" at the top of the excel screen and select "Show all Comments"
- Definitions of OHRS codes may be found in the Ontario Healthcare Reporting Standards available on www.hsimi.on.ca

Service Selection Page

- Within the Ontario Healthcare Reporting Standards (OHRS) chart of accounts for Service Activity, there are over 190 potential functional centers within which services may be provided by community HSPs in Ontario.
- The individual functional centers are listed in the left column with their corresponding OHRS codes showing directly beside the service. Type an “x” in the right column (containing yellow cells) to select services that the agency delivers. This will cause the services that appear on the Activity Planning Page to be specific in the next step.
- Administration and Support Services is mandatory and has been pre-selected for you.

Community Accountability Planning Submission (CAPS) LHIN Managed Funding

HSP Name :

3 Year Plan: 2014-17

SERVICE SELECTION SCREEN

[Return to Main Page](#)

SERVICE SELECTION SCREEN		
<i>Enter an "x" under the "LHIN Funded Services" column below for each service that your agency provides.</i>		
		LHIN Funded Services
Total Administration Expenses		
Undistributed Accounting Centres	82*	
Administration and Support Services	72 1*	X
COM Clinical Management	72 5 05	
COM Medical Resources	72 5 07	
Diagnostic and Therapeutic Services 72 4* (Community Health Centres)		
LAB Pre/Post Analysis	72 4 10 21	
MI Combined Functions	72 4 15 99	
NV Non - Invasive Cardiology - Combined	72 4 30 20	
Case Management 72 5 09*		
Case Management (CCAC)	72 5 09 30	
Case Management - Mental Health	72 5 09 76	
Case Management Addictions - Substance Abuse	72 5 09 78 11	
Case Management Addictions - Problem Gambling	72 5 09 78 12	
Primary Care- Clinics/Programs 72 5 10*		
Practice	72 5 10 05	
Clinics/Programs - Walk In Clinic	72 5 10 10	
Nursing Clinic	72 5 10 15	
Clinics/Programs - General Clinic	72 5 10 20	
Combined Clinic	72 5 10 30	
Therapy Clinic	72 5 10 40	
Clinics/Programs - Oral Health Clinic	72 5 10 45	
Clinics/Programs - Chronic Disease Clinic	72 5 10 50	
Clinics/Programs - CHC Other Clinic	72 5 10 55	
Clinics/Programs - Oncology - Treatment Outreach Clinic	72 5 10 66 10	
Clinics/Programs - Oncology - Preventative Clinics	72 5 10 66 20	
Clinics Programs - MH Counseling and Treatment	72 5 10 76 12	
MH Assertive Community Treatment Teams	72 5 10 76 20	
MH Community Clinic	72 5 10 76 30	
MH Vocational/Employment	72 5 10 76 40	
MH Clubhouses	72 5 10 76 41	

- [Return to Main Page](#) after selecting all of your HSPs functional centers.

Activity Planning Page

- The Activity Planning Page in CAPS includes all service data for the HSP and is not broken down by TPBE. All of the functional centers that were selected on the Service Selection Page are displayed, as well as the service activity statistics (e.g. Visits Face to Face, Individuals Served by functional centre, etc.) that are mandatory. Please note that mandatory Service Activity statistics vary between functional centers. For additional information on Ontario Healthcare Reporting System (OHRS) functional centers and mandatory service activity reporting, please refer to the Health Data Branch Web Portal site <https://hsimi.on.ca/hdbportal/>
- If a functional center that you require is not appearing on the Activity Planning Page, please return to Service Selection Page and ensure that an “x” has been placed within the LHIN Funded Service Column for all required functional centers.

Community Accountability Planning Submission (CAPS) LHIN Managed Funding						
HSP Name : _____						
3 Year Plan: 2014-17						
ACTIVITY SUMMARY						
Return to Main Page						
Functional/Accounting Centre Service		MIS FIC	2013-14 Budget (Historical)	2014-15 Plan Target	2015-16 Plan Target	2016-17 Plan Target
Show HSP Specific		Show All				
		M				
Total Administration Expenses						
Undistributed Accounting Centres 82*						
Full-time equivalents (FTE)		82*	125.00	0.00	0.00	0.00
Visits		82*	130	0	0	0
Not Uniquely Identified Service Recipient Interactions		82*	135	0	0	0
Hours of Care		82*	140	0	0	0
Inpatient/Resident Days		82*	145	0	0	0
Individuals Served by Functional Centre		82*	150	0	0	0
Attendance Days Face-to-Face		82*	155	0	0	0
Group Sessions		82*	160	0	0	0
Meal Delivered-Combined		82*	165	0	0	0
Total Cost for Functional Centre		82*	\$170	\$0	\$0	\$0
Group Participant Attendances		82*	180	0	0	0
Service Provider Interactions		82*	185	0	0	0
Administration and Support Services 72 1*						
Full-time equivalents (FTE)		72 1*	7824.00	0.00	0.00	0.00
Visits		72 1*	55	0	0	0
Not Uniquely Identified Service Recipient Interactions		72 1*	60	0	0	0
Hours of Care		72 1*	65	0	0	0
Inpatient/Resident Days		72 1*	70	0	0	0
Individuals Served by Functional Centre		72 1*	75	0	0	0
Attendance Days Face-to-Face		72 1*	80	0	0	0
Group Sessions		72 1*	85	0	0	0
Meal Delivered-Combined		72 1*	90	0	0	0
Total Cost for Functional Centre		72 1*	2832	0	0	0
Group Participant Attendances		72 1*	180	0	0	0
Service Provider Interactions		72 1*	185	0	0	0
COM Clinical Management 72 5 05						
Full-time equivalents (FTE)		72 5 05	200.00	0.00	0.00	0.00
Visits		72 5 05	205	0	0	0
Not Uniquely Identified Service Recipient Interactions		72 5 05	210	0	0	0
Hours of Care		72 5 05	215	0	0	0

- The Activity Planning Page has the same columns as the LHIN-Managed Funding & FTE Planning form.
- The **2013-14 Budget (Historical)** column will be pre-populated from the 2013-14 CAPS.
- Each of the **yellow** cells (mandatory for OHRS reporting) must be completed within the **2014-15 Plan Target**, **2015-16 Plan Target** and **2016-17 Plan Target** columns.
- Comments:** The Comments column should be used to explain differences between the budgets across the years indicated. The comments provide clarification and will help the LHIN understand why Reallocations/Budget changes are being made.

Verify the Edit Checks

- Green happy faces 😊 indicate successful edit checks. Red sad faces ☹ indicate failed edit checks, which must be corrected before submitting the report.
- If you see a red sad face, a description of the problem to be resolved will appear in the Message Area of the row.

Community Accountability Planning Submission (CAPS) LHIN Managed Funding

HSP Name: Hopital Montfort

3 Year Plan: 2014-17

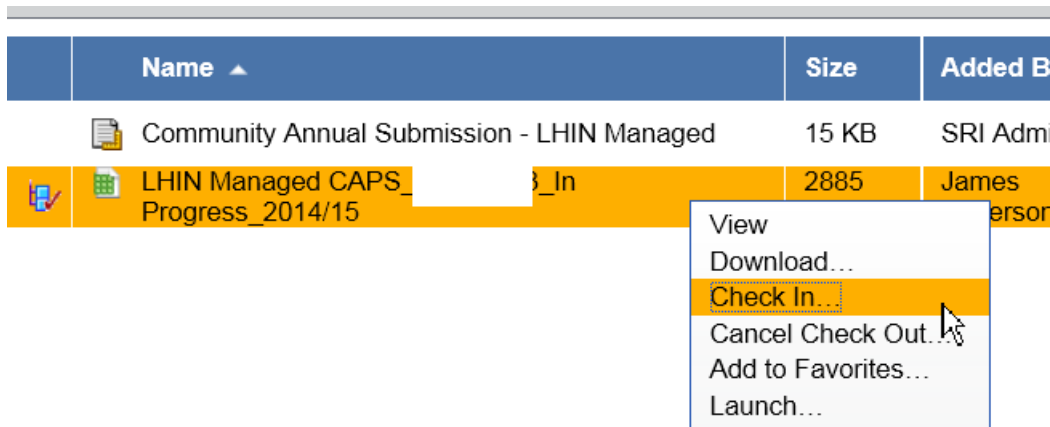
EDIT CHECKS

[Return to Main Page](#)

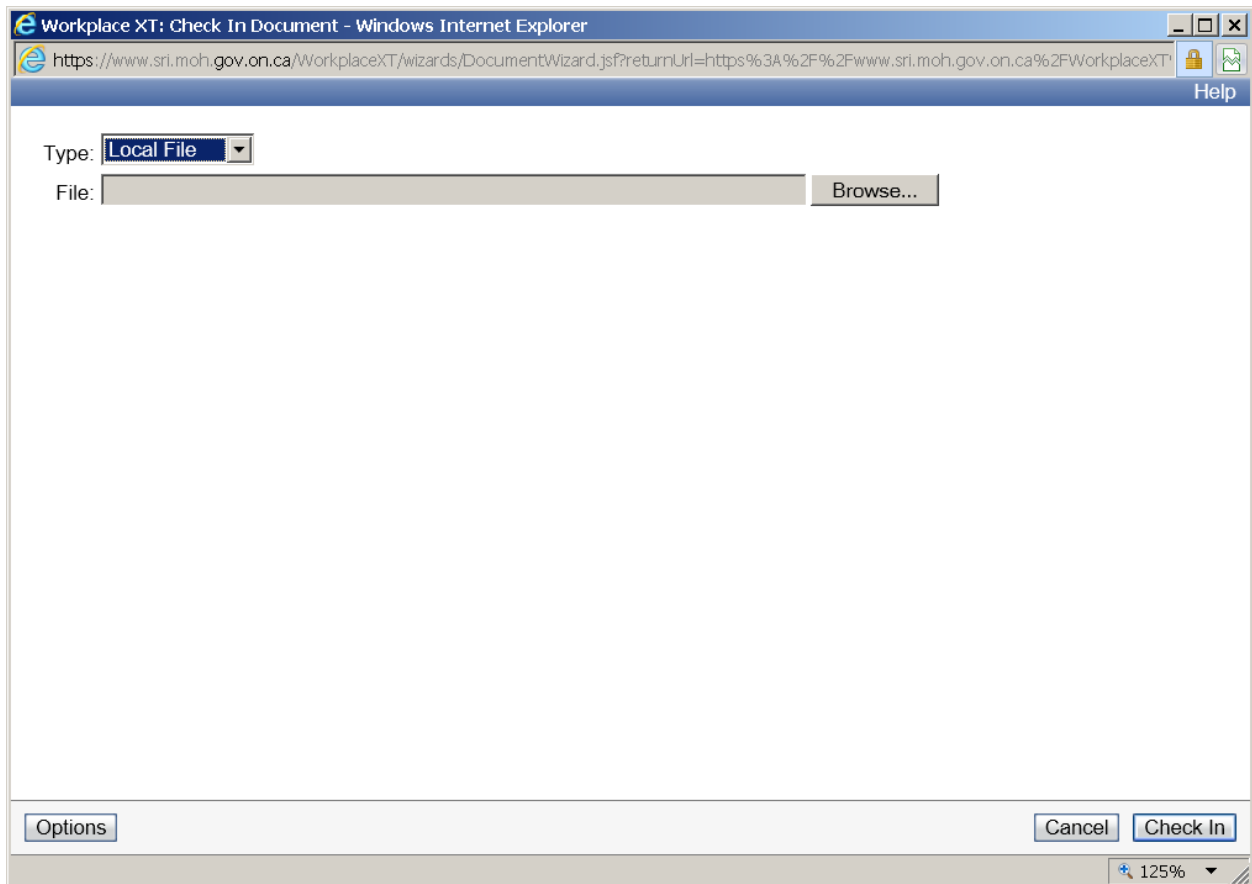
EDIT CHECKS	Year 1	Year 2	Year 3	Message Area											
The HSP Identification Screen is Complete				Please ensure all line items on the Identification sheet that are 'yellow' are complete.											
All expenses planned are allocated to Functional Centres on the LHIN Activity Screen.				The total of your Fund Type 2 expenses in row 47 on the LHINFin_Summary sheet is not equal to your total allocated expenses in row 2691 on the LHINAct_Summary sheet.											
All FTEs planned are allocated to Functional Centres on the LHIN Activity Screen.															
Total Fund Type 3 is not planned as a Deficit.															
TPBE SPECIFIC EDIT CHECKS	)	(ABI)	(PG)	(SAP)	(POMS)	(CMH)	(CSS)	(PALC)	(AO)	(SH)	(CHC)	(CCAC)	Extra1	Extra2	
All LHIN budgeted TPBEs (Fund Type 2) are planned with a Zero Surplus/Deficit.															
All budgeted TPBEs are planned with Administration Expenses (WARNING ONLY).															
All budgeted TPBEs are planned with FTE allocations.															

Checking in the file to SRI

15. Once completed, you are now able to upload the file to SRI
16. Now go back to SRI, go back to the file. Right click and select **“Check In”**. Do not select any of the other options.



17. Click **“Browse”**, find the file and then select **“Check In”**

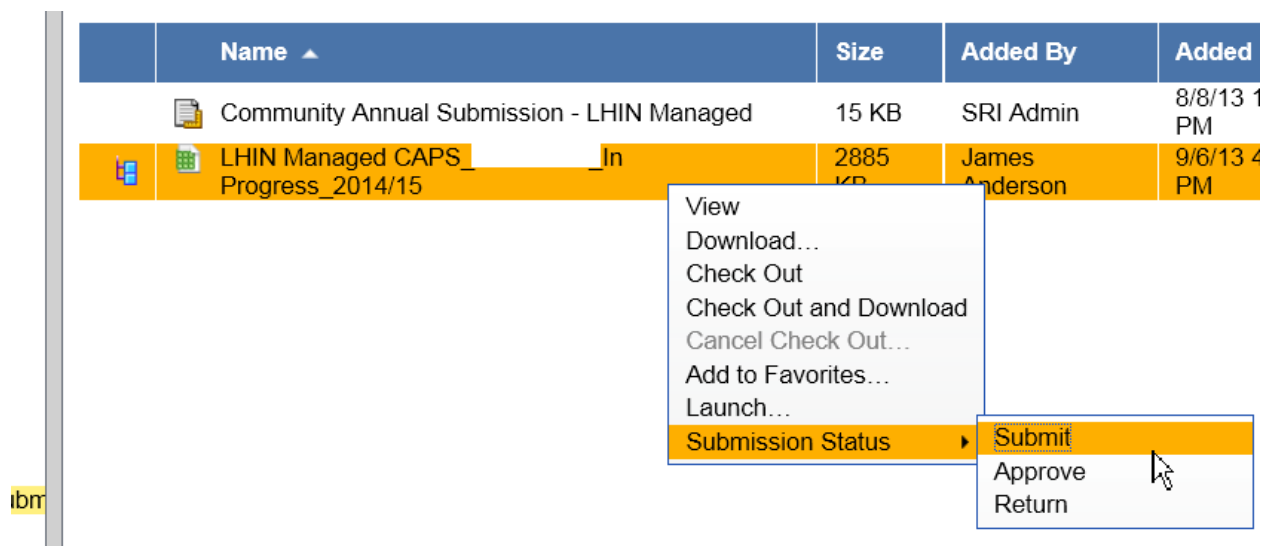


18. This screen will confirm that the check in was successful.

 Filename: LHIN Managed CAPS_C 014_15.xls
Location: SRI_SRI10S
Class: SRIXLS Q2 Community
Version: 3.0

Checkin succeeded for: LHIN Managed CAPS_ In Progress_2014/15

19. You can now submit the report. To do so, right click and select **“Submission Status”** and then **“Submit”**. If it does not work, you may need to wait a few minutes so that the upload will take.



	Name ▲	Size	Added By	Added
	Community Annual Submission - LHIN Managed	15 KB	SRI Admin	8/8/13 1 PM
	LHIN Managed CAPS_ In Progress_2014/15	2885 KB	James Anderson	9/6/13 4 PM

- View
- Download...
- Check Out
- Check Out and Download
- Cancel Check Out...
- Add to Favorites...
- Launch...
- Submission Status
 - Submit
 - Approve
 - Return

Main Contacts

If you have any questions about the CAPS that you have “Checked Out” from SRI, or any questions about definitions or specifics, please phone or email your LHIN contact at:

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