

LinkLog

Making Reports Easy

OACAO — SALC PROGRAMME

All changes are automatically updated in your CSV files.

LinkLog
Social Prescribing Client Management
V3.0 PROTOTYPE

MAIN

- SALC Homepage
- Client Directory
- Interaction Log
- Submit a Form**
- View Analytics

Let's start with your referral data.

While filling out the form, you can also track your progress below

1 Referral Data 2 Referral Outcomes 3 Human Resources 4 Human Resources 5 Review

Here's a guide for you what the field statuses mean

- Required** Require data, if no data, put "0."
- Pre-filled** Auto-populated from your records
- Optional** Needs to be filled

1.1 How many referrals did you receive from the following sources during this reporting year?

The reporting year is from April 1, 2025 to Mar 31, 2026

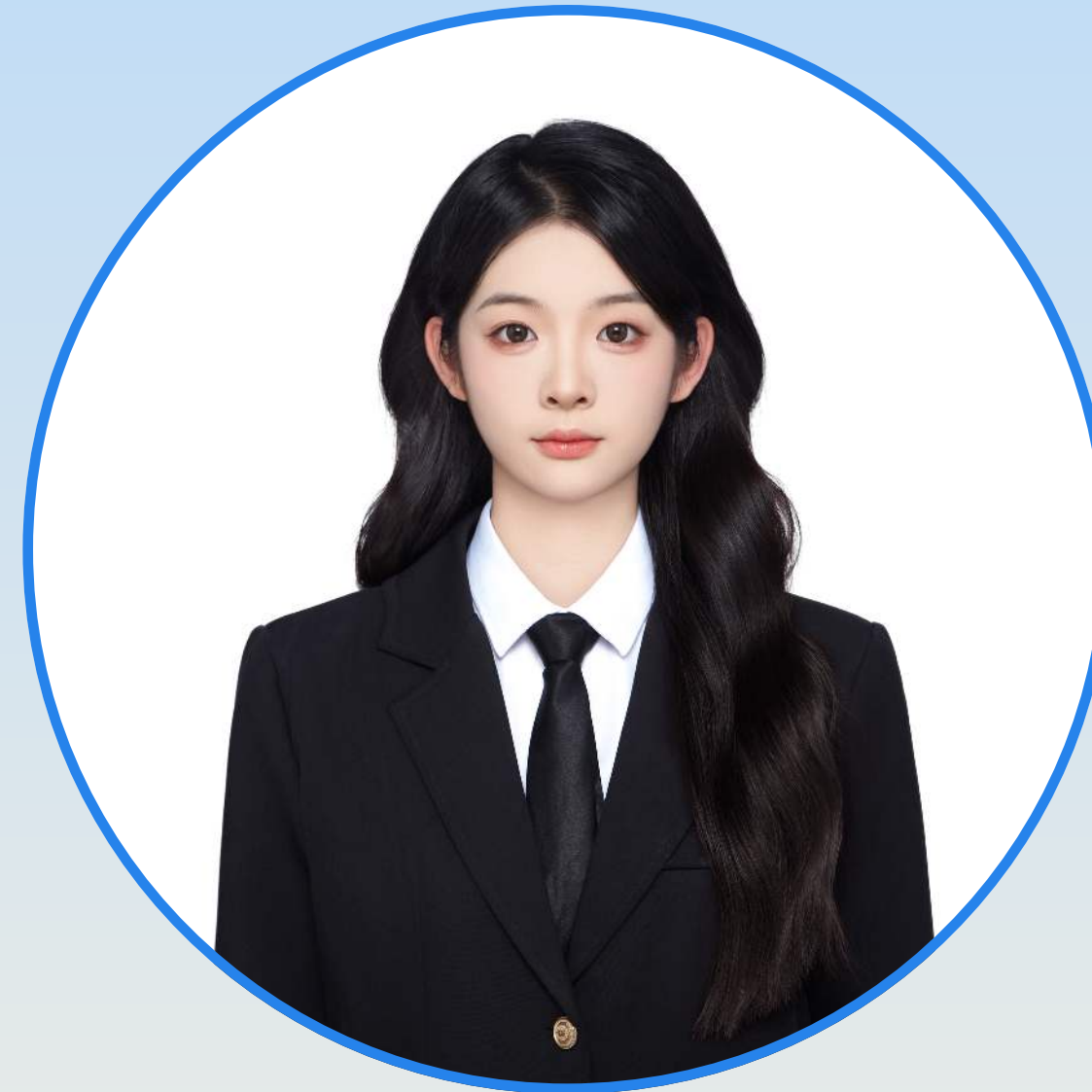
Meet the Team



David Dimalanta



Gerold Song



Keyan Huang



Maecel Enriquez

Problem Scoping



10 out of 10 SALCs manually compiles information
they use for reporting every year

**“I don't know if you know all about
the reporting process, but it's, it's
like a three day event to try and do
the final report.”**

— Brenda (LinkWorker)

Three Primary Problem Areas of Focus



LWs data-tracking practices of L2W clients varies extremely across SALCs



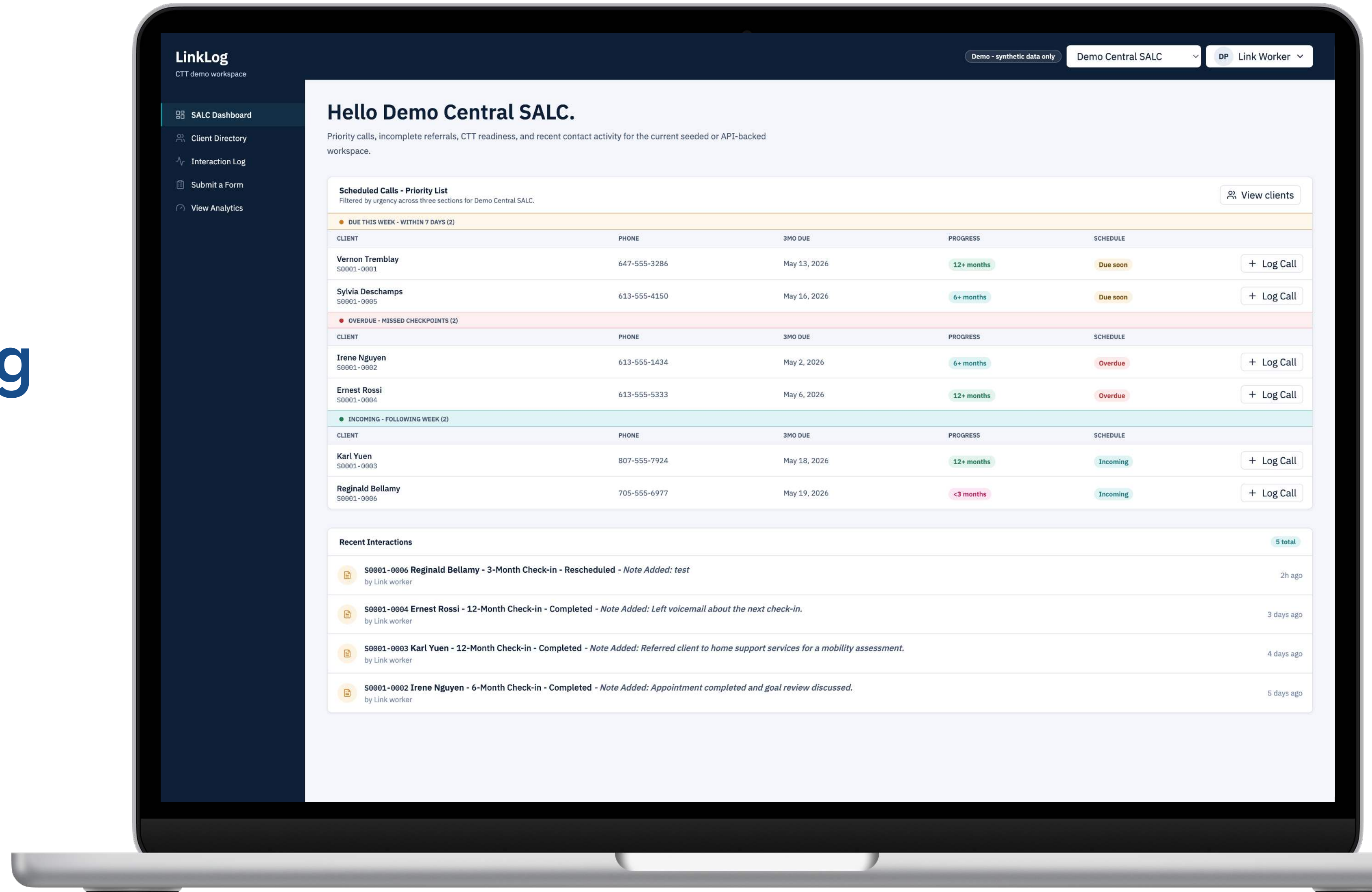
Reporting data compounds an already overwhelming workload



OACAO has to contact SALCs persistently to get year-end report data and to juggle through all the SurveyMonkey forms

Introducing LinkLog

...again

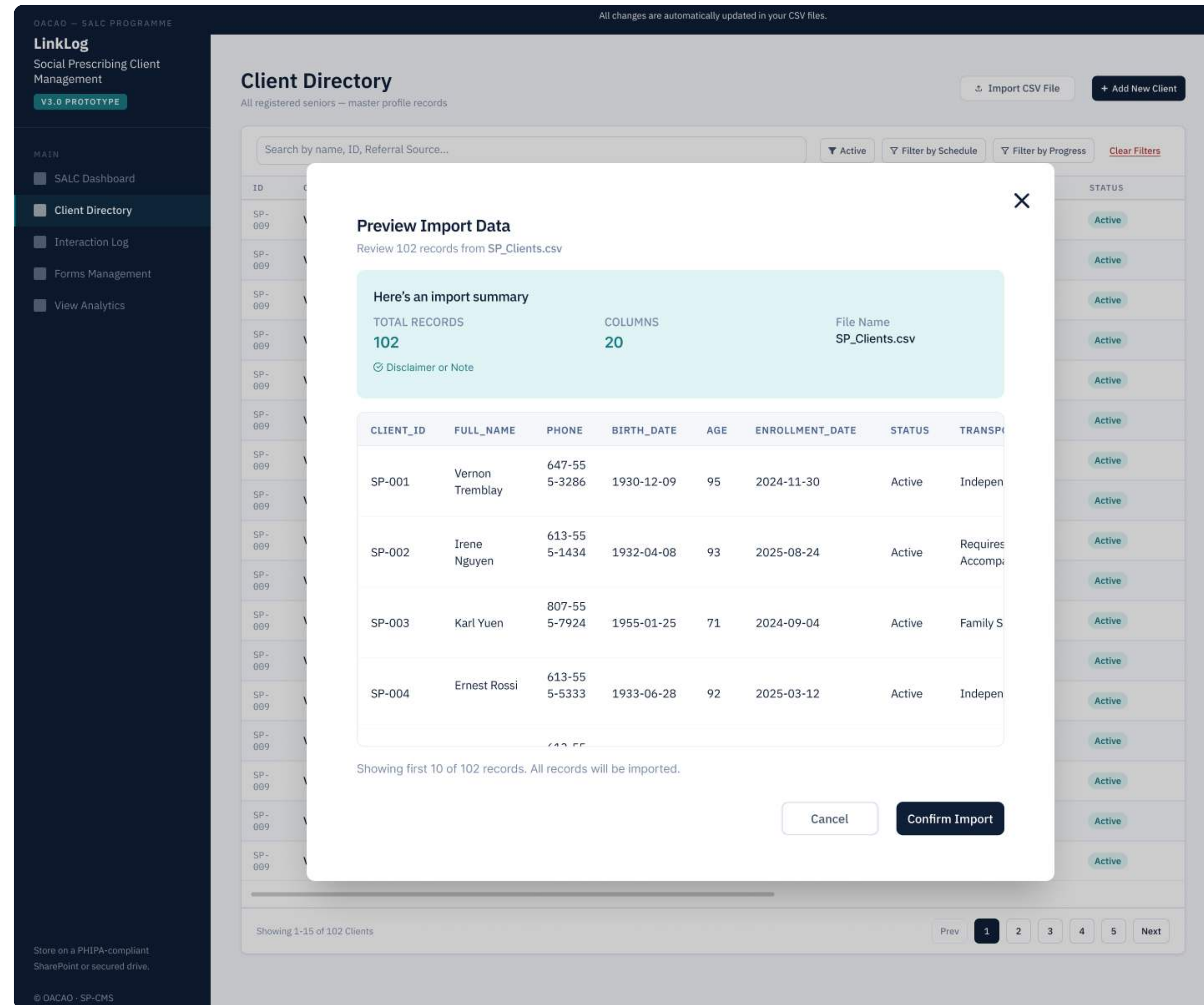


Enhancement #1

Importing spreadsheets into a standardized directory

By taking advantage of current LinkLog features (e.g. Client Directory), we can introduce a standardized data directory for both client tracking & reporting.

No more duplicated data entry across local spreadsheets, Appendix forms, or SurveyMonkey.



Enhancement #2

Integrated yearly reports with auto-populated fields

LinkLog aggregates data from the Client Directory and auto-populates the Common Tracking Tool (CTT) fields to get rid of duplicated workflows and free up LWs time.

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1.1 How many referrals did you receive from the following sources during this reporting year?

The reporting year is from April 1, 2025 to Mar 31, 2026

Community Health Centres (CHC) **Pre-filled** ?
Include all referrals from a CHC, regardless the role/person who provided the referral

25

Community Paramedics **Pre-filled** ?
Include all referrals from a hospital, regardless the role/person who provided the referral

25

Hospitals **Pre-filled** ?
Include all referrals from a hospital, regardless the role/person who provided the referral

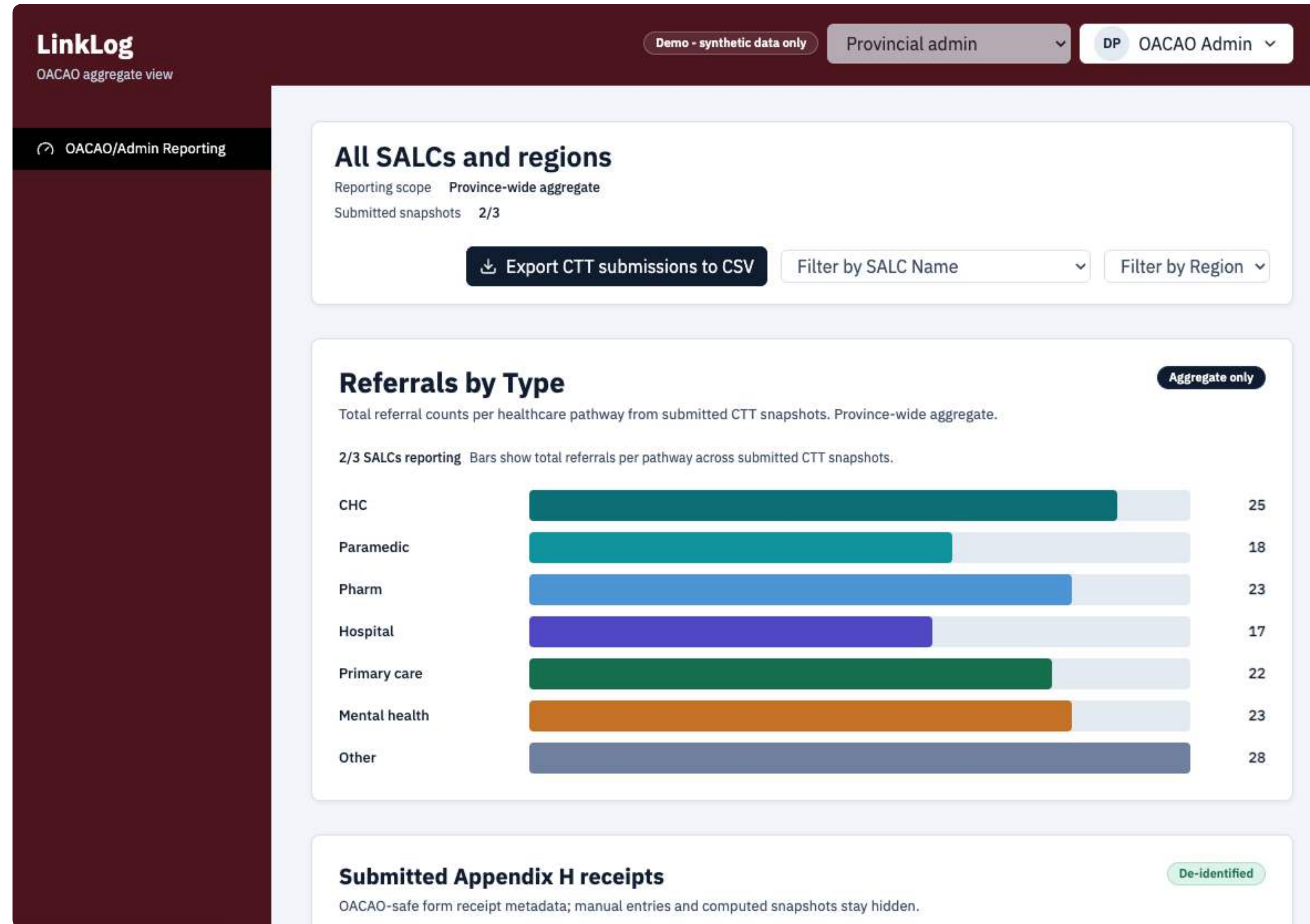
25

Enhancement #3

OACAO Reporting Dashboard

OACAO workers can access a Reporting Dashboard that shows aggregated data and highlights from all SALC's reports.

The options is yours to view immediate metrics through an interactive chart or export the report data as a csv for your own analyses.



Service Demo

Link to Live Demo

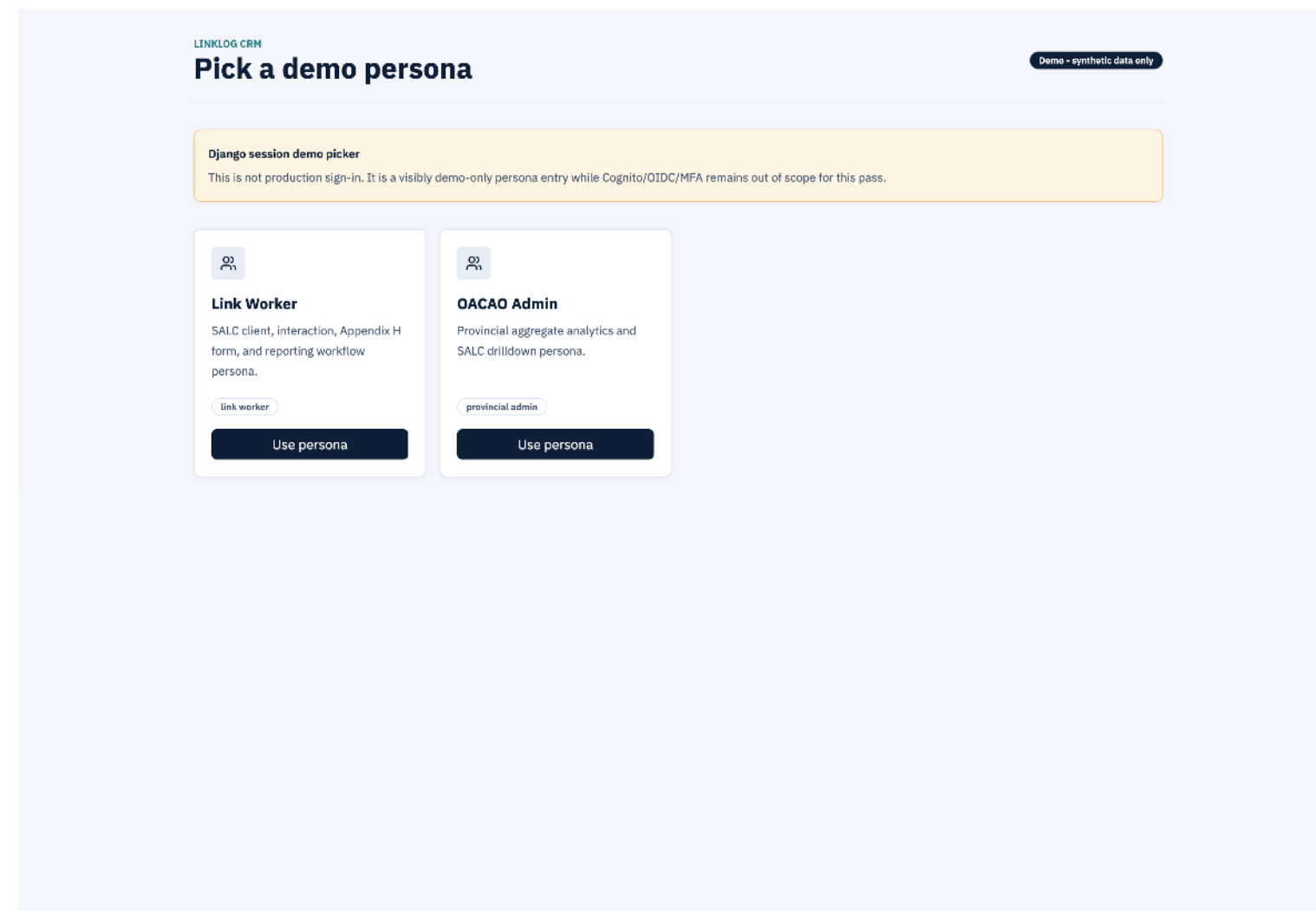
<http://linklog-demo-alb-1724749606.central-1.elb.amazonaws.com/>

Link to Figma Prototype

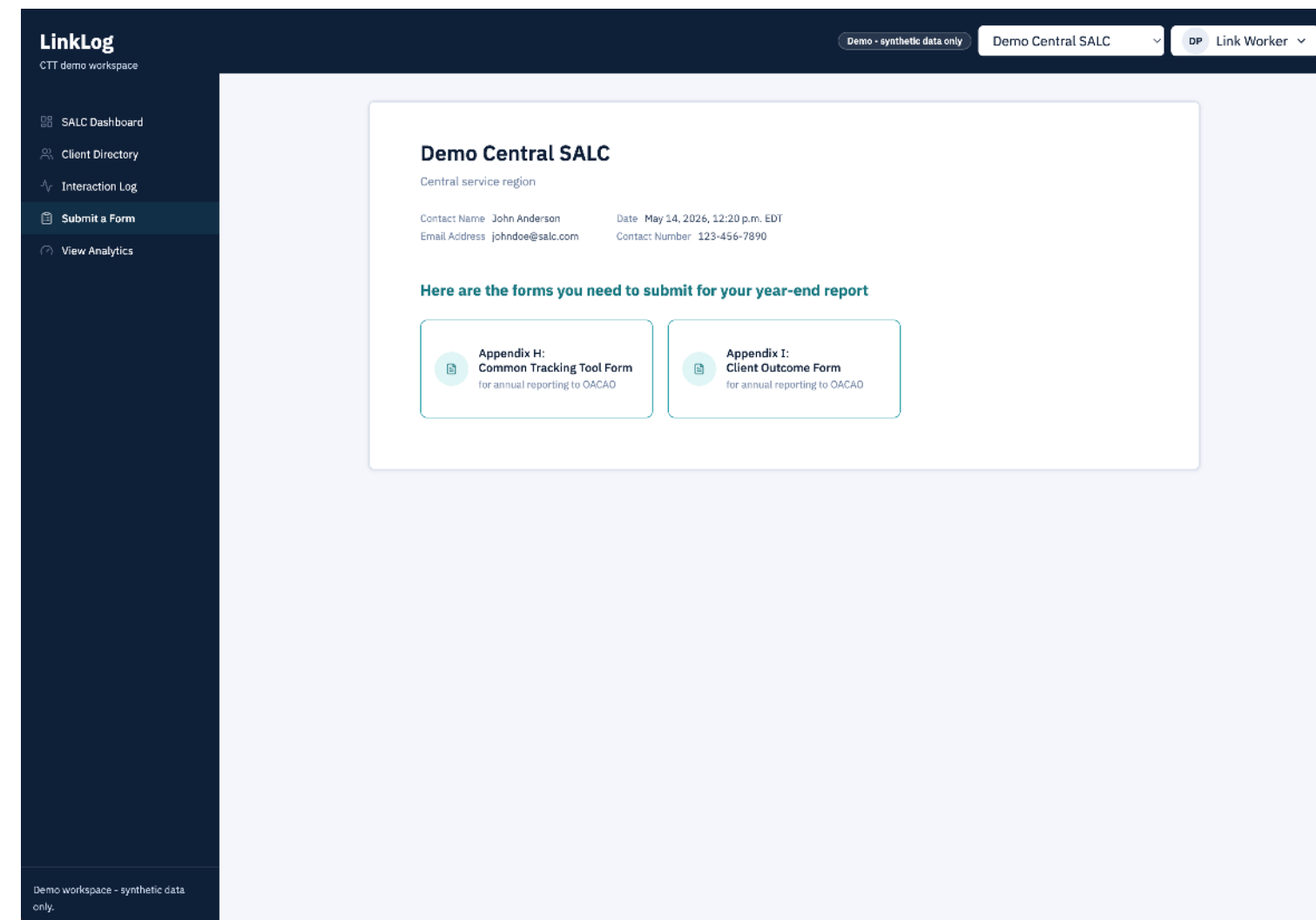
<https://tinyurl.com/LinkLogV3byTeam2>

Live Demo and Enactment

Presented Link Worker and OACAO Reporting Proposed Reporting Process

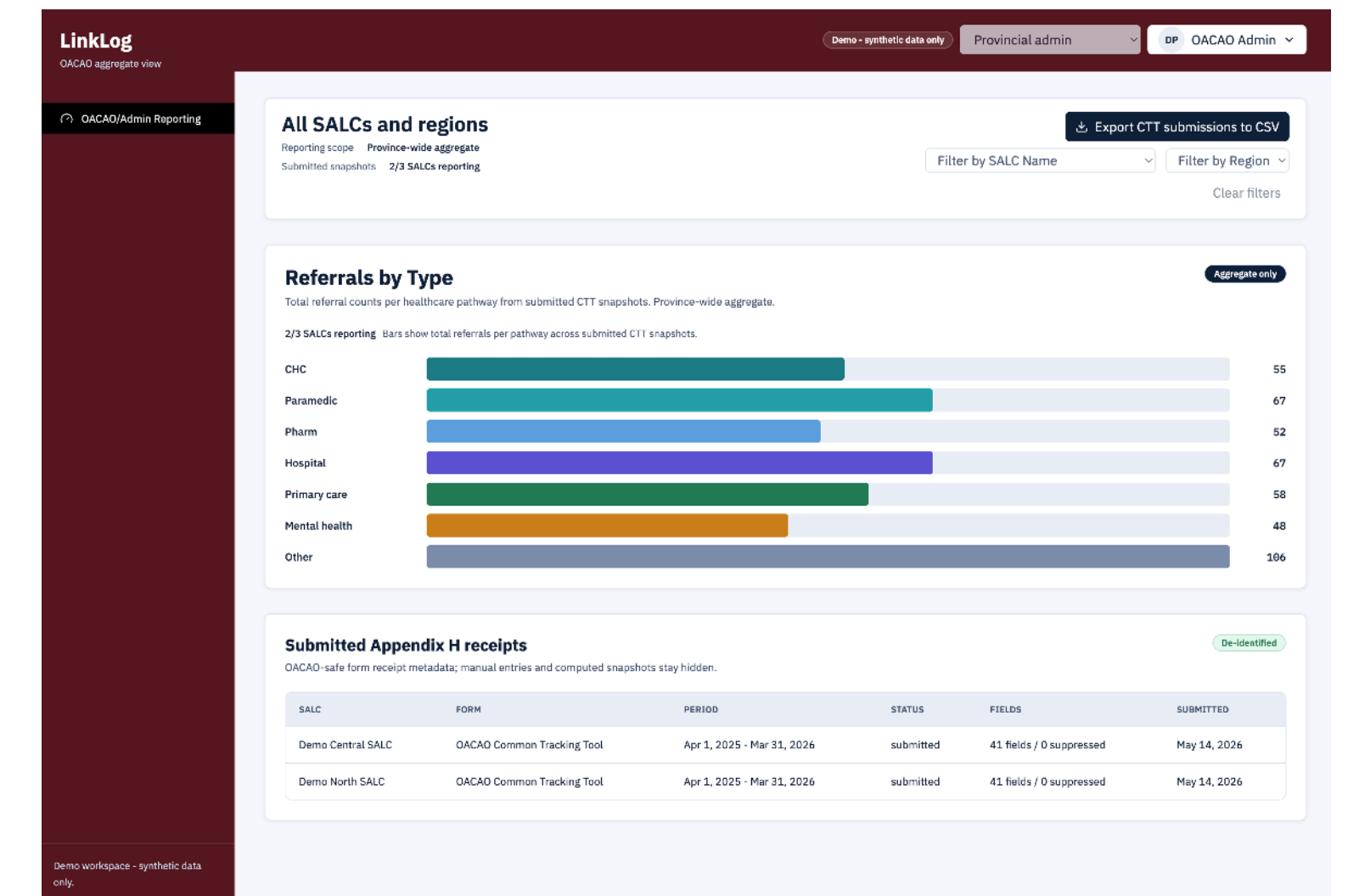


Two User Roles in Live Demo



Link Worker Dashboard:

<http://linklog-demo-alb-1724749606.ca-central-1.elb.amazonaws.com/dashboard>



OACAO Dashboard:

<http://linklog-demo-alb-1724749606.ca-central-1.elb.amazonaws.com/admin/reporting>

Service Integration



Implementation Plan

Now

1-3 Months

- Construct and finalize relational database schema
- Pilot test prototypes with Link Workers to collect feedback
- Finalize roles & permissions, OACAO data governance, and stress test platform security

Next

3-6 months

- Standardize the CSV Template for reporting forms
- Digitize all client info touch-points
- Pilot Testing of LinkLog in at least few SALCs before implementation across all SALCs
- Privacy audit before any real client data is live

Later

6+ months

- Get all SALCs onto LinkLog
- Develop a Link Trainer (LT) project to delegate onboarding and uptake advocacy
- Get funding to scale platform for more SALCs
- Manage ongoing operations, support, and software updates

Critical Dependencies

Give SALCs notice of upcoming process changes

Audit appendix forms and overhaul survey design

Back-end requirements:






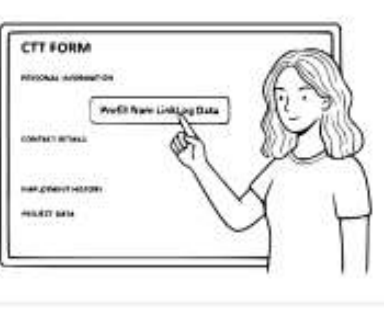

Hosting platform online

- being PHIPA compliant
- de-identifying data when sending to OACAO
- finalized RDB

Onboarding tools for LWs (e.g., video tutorials)

Developing LW relationships

Future State Service Blueprint

Future State	Onboarding, Referral distribution, CSV encoding		Intake & follow-up		Auto-populated reporting, One-click submission	Aggregated SALC data	
LinkLog Future State Blueprint	LW joins SALC & learns LinkLog	LW receives referral & encodes in CSV	LW reaches out & updates intake	LW follows up & logs interactions	Year-end reporting	Submit report to OACAO	OACAO collects de-identified SALC data for reports
Journey Stage and Feature State Experience	 <p>The link worker is introduced to LinkLog as the central tool for client management, form filling, and reporting.</p>	 <p>The link worker enters referral data into a standardized CSV file and loads it into LinkLog.</p>	 <p>The link worker contacts the referred client, conducts intake, and updates client information in LinkLog.</p>	 <p>The link worker conducts regular check-ins (3,6,12 months) and logs all interactions in LinkLog.</p>	 <p>The link worker imports data from LinkLog/CSV to auto-populate digitized OACAO forms (e.g., CTT).</p>	 <p>The link worker reviews the completed form and submits it directly to OACAO from LinkLog.</p>	 <p>OACAO receives the reports through LinkLog's Admin View with a dashboard containing the aggregate and individual SALC data</p>
New Touchpoints or Features	<ul style="list-style-type: none"> LinkLog online platform CSV upload Standardized referral form 	<ul style="list-style-type: none"> "Add client" button in LinkLog CSV import/export function 	<ul style="list-style-type: none"> Client dashboard 		<ul style="list-style-type: none"> Digitized OACAO forms (CTT + Appendix F) Report summary dashboard (KPIs, charts) 		<ul style="list-style-type: none"> CSV Export function
Implementation Considerations	<ul style="list-style-type: none"> Process: One-time file association, CSV column mapping System: Password protected + roles based + MFA 	<ul style="list-style-type: none"> Artifact: Standardized CSV Training: How to fill CSV fields, data privacy (PHIPA) 	<ul style="list-style-type: none"> Artifact: Follow-up Digital Questionnaire System: LinkLog, phone, email (optional) 		<ul style="list-style-type: none"> Backstage Process: Read Client Directory Data → De-identify → aggregate data to fields in CTT → auto-populate quantitative fields → flag missing data with required input fields Artifact: Digitized CTT template Training: How to submit, where to find archive Privacy: OACAO must ensure that any PII will only remain on the client side 		

Thank you!
Any questions?



Appendix A - Additional Resources for OACAO



Link Log Spec Sheet

For future developers taking on this project, or for OACAO staff who want to understand what LinkLog is built on, [Read this spec sheet >](#)

LinkLog | Enterprise Readiness Briefing

LinkLog

A Tenant Safe Data Platform for Community and Seniors Programs

Specification and Enterprise Readiness Briefing
Prepared for OACAO and future engineering partners
Version 1.0 | Status snapshot dated 2026-05-14

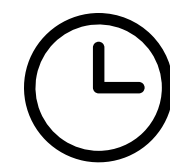
Link Log Operational Costs



Hosting + DNS

Roughly \$1900 yearly.

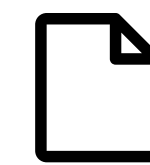
AWS fees + custom DNS (\$1800 + \$100 respectively)



Staff Time

Staffing for:

- SALC co-design sessions
- Developer/IT to maintain



R&D

- Finalizing backstage (tech-stack + roles & data privacy)
- Co-designing with LWs

Suggested Metrics

Measuring Impact to Link Workers

To measure whether LinkLog has improved link workers' experiences with data organization/reporting to OACAO, the following questions focusing on time savings and efficiency can be asked to them:

“How much has LinkLog:

- Reduced the amount of time you spend on manual data entry for L2W clients?
- Reduced the amount of time you spend on organizing L2W client records?
- Reduced the amount of time you spend on submitting reports to OACAO?”

Suggested Methodology:

1. Quantitative Study with Likert-Type Agreement Scale with 1 (Strongly Disagree) to 7 (Strongly Agree) agreement scale to minimize how much extra workload you are asking of them;
2. Qualitative Interviews using the questions converted to open-ended version to capture greater depth and nuance of LinkLog impact on link workers' experiences.

Measuring Impact to OACAO

To measure LinkLog's objective impact on helping OACAO receive more CTT reports from SALCs, the following can be measured:

- Completion rate of CTT by the fiscal year deadline in the first year of LinkLog rollout compared to the prior year.

Outcomes

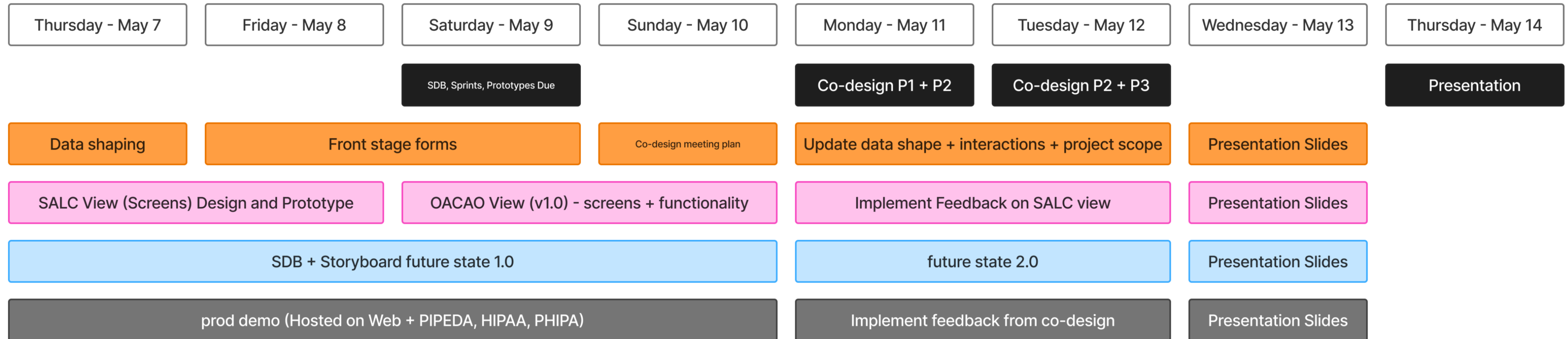
- A seamless workflow where LWs manage daily operations in LinkLog, and the mandatory OACAO CTT (and other necessary forms) is automatically generated, validated, and ready for submission with minimal manual consolidation required for quantitative fields.
- LinkLog has the infrastructure to support data storage in online servers for SALCs and OACAO, and is PHIPA-compliant.
- OACAO is able to aggregate all the data from different SALCs into reports that allow OACAO a more efficient and standardized way to consolidate the outcomes of the L2W program

Appendix B - Process



Timeline

Our team sprint + deliverable timelines



Legend

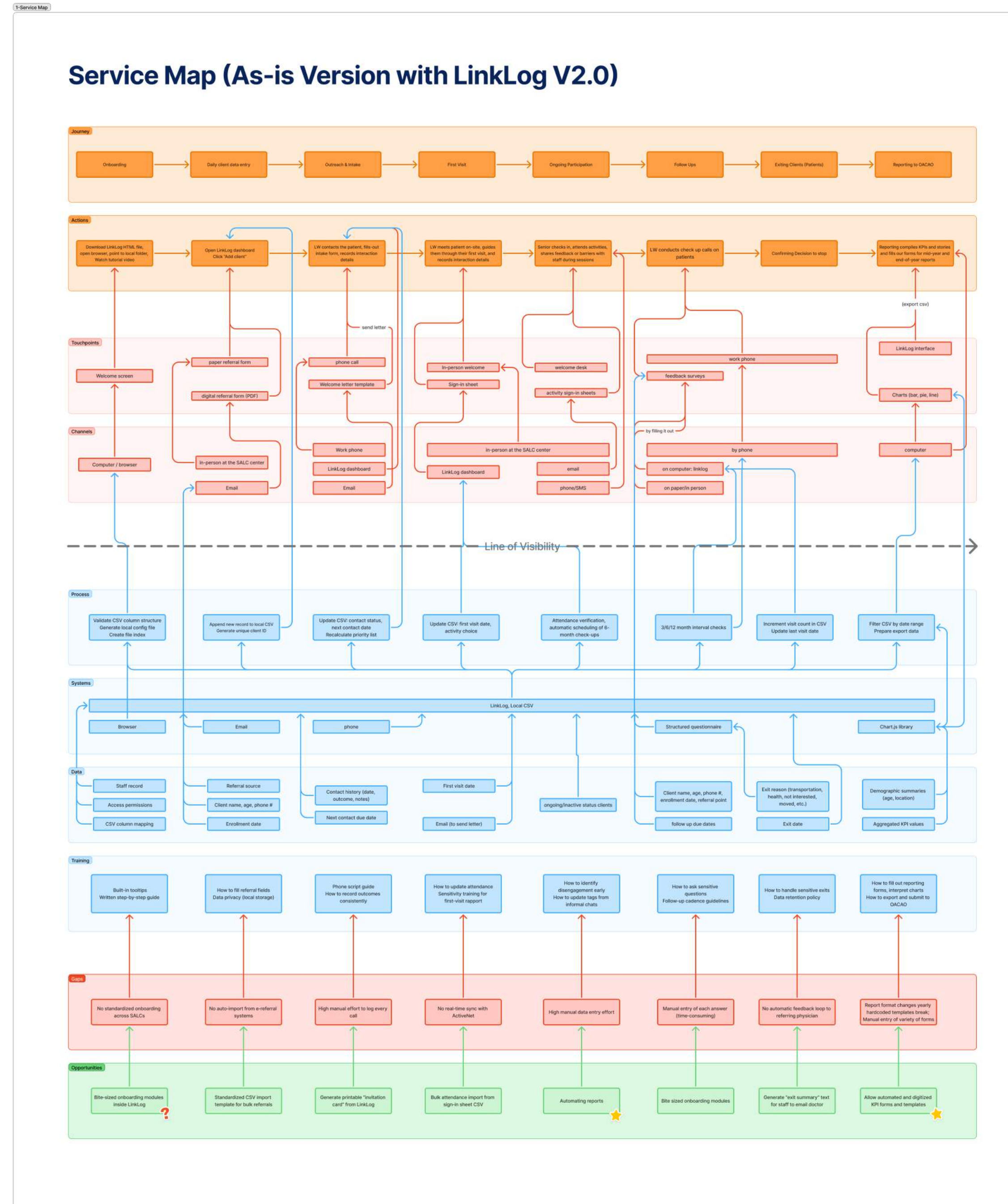


Process

Service Map: Current State

Figjam File:

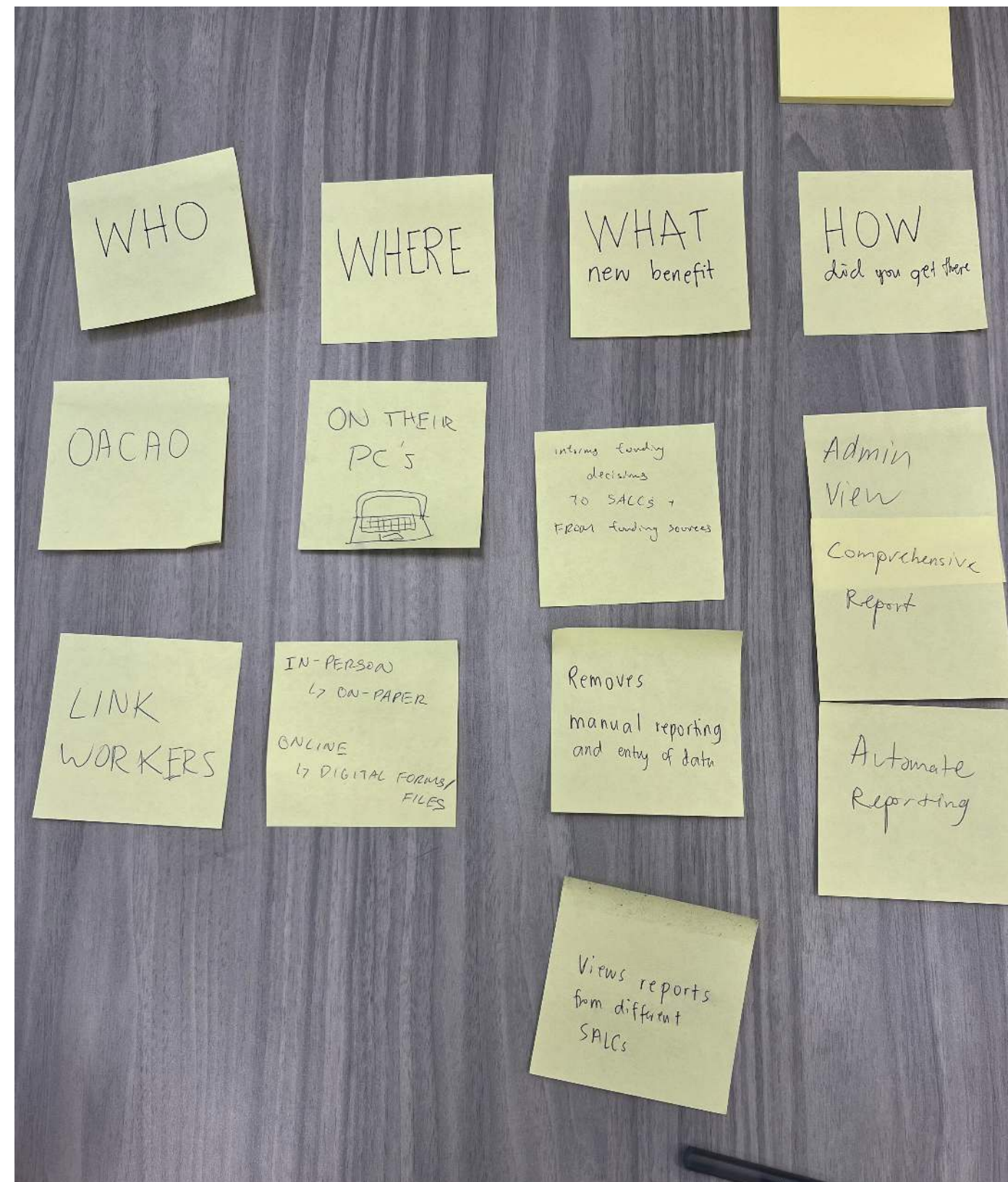
<https://www.figma.com/board/p4x4Ne92DYQypBqv7GnaXR/INF2224-Group-2?node-id=0-1&t=FSEHSjxBOKk8qdEZ-1>



Process

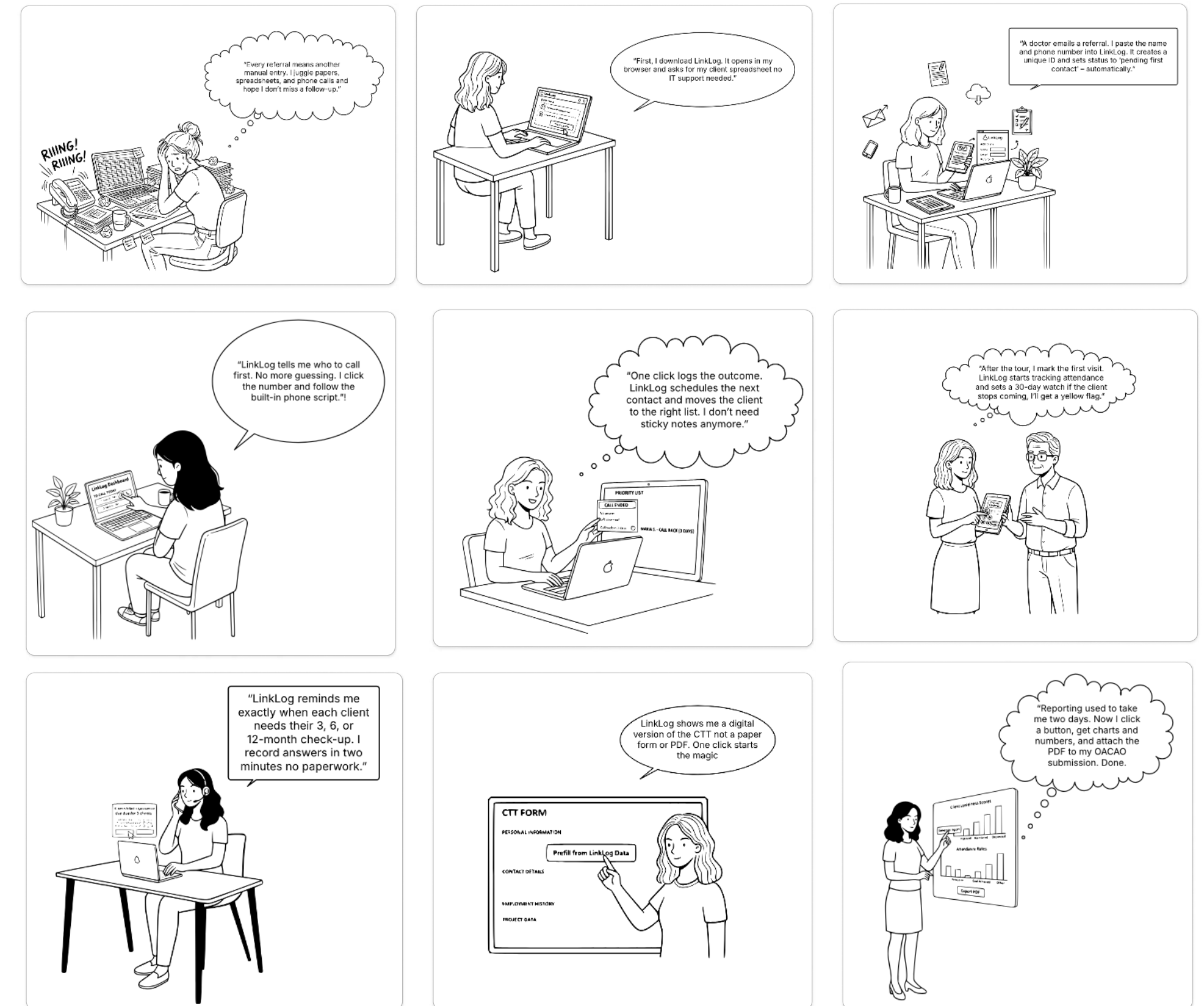
Storyboard

Customer Journey Planning (Initial Version)



Figjam File:

<https://www.figma.com/board/p4x4Ne92DYQypBqv7GnaXR/INF2224-Group-2?node-id=0-1&t=FSEHSjxBOKk8qdEZ-1>



Process

Sprint Plan

Sprint Overview, Co-Design 1&2, Hypothesis

Sprint Plan

Sprint Overview				
Week 1	May 7 <ul style="list-style-type: none"> Create Data Dictionary for digitized Common Tracking Tool (CTT) fields and map to existing LinkLog v3.0 csv structure, and other hypothesized Appendix forms (Gerold) Backstage: figure out sever hosting (David) 	May 8 <ul style="list-style-type: none"> Frontstage: Create digitized CTT Sections 1.1 through 4.4 within the LinkLog UI and Task Flows for Form Management and Reporting Tool (Maecel) Backstage development: tech stack based on policy constraints — HIPAA, PIPEDA, PHIPA (David) Service Design Map + Storyboard (Keyan) 	May 9 <ul style="list-style-type: none"> Frontstage: Refine the flows for form filling (importing and auto-populating) CTT Sections 1.1 through 4.4 within the LinkLog UI (Maecel) Deliverables: Project Update: Prototype, Service Design Map, Sprint Plan Integrate OACAO reporting view of LinkLog into live prototype (David) <ul style="list-style-type: none"> + live prototype of the updated SALC view of LinkLog (David) 	May 10 <ul style="list-style-type: none"> Finalize prototype v1.0 demo (Maecel/David) Create co-design meeting plans (Gerold)
Week 2	May 11 <ul style="list-style-type: none"> Get demo on feedback from OACAO stakeholders through co-design session (all team members) Confirm/Limit product scope for Week 2 based on OACAO feedback (Gerold) Design OACAO "Admin View" screens for displaying aggregated, de-identified metrics across all SALC CTT forms (Maecel) 	May 12 <ul style="list-style-type: none"> Get demo on feedback from OACAO stakeholders through co-design session (all team members) Finalize backstage infrastructure (David) Implementation plan (Gerold) 	May 13 <ul style="list-style-type: none"> Presentation slides (Keyan) Finalize prototype v2.0 demo (Maecel/David) 	May 14 <ul style="list-style-type: none"> Present to OACAO stakeholders

Co-Design Session 1		
Stimuli	Tasks	Measurement
<p>Existing:</p> <ul style="list-style-type: none"> OACAO Common Tracking Tool (Appendix H) in PDF Format for digital and print Other relevant Appendix Forms <p>New</p> <ul style="list-style-type: none"> LinkLog CSV structure (adapted from previous Group 3) Prototype: <ul style="list-style-type: none"> SALC View: Digitized CTT form and automated filling feature OACAO View: aggregated data view Backstage: program script to auto-populate digitized CTT form from SALC client-level data Legal and Technical Compliance Architecture for LinkLog: Implementing PHIPA, PIPEDA, and HIPAA Requirements in Ontario's Social Prescribing Ecosystem - Gemini Report 	<p>Backstage Co-Design:</p> <p>Data Structure for Digitized Forms + Auto-Population:</p> <ul style="list-style-type: none"> Run through variables and mappings sheet and get feedback on accuracy, assumptions, and feasibility <p>Data Stack / PHIPA compliance:</p> <ul style="list-style-type: none"> Ask the following questions: <ul style="list-style-type: none"> Is OACAO an Electronic Service Provider (ESP), a Health Information Network Provider (HINP), or an Agent of the SALCs? What workspace do you guys use? Informs which identity provider will be used (e.g., Google, Microsoft Entra ID). Are individual SALCs independent Health Information Custodians (HICs), joint custodians, or non-health community service organizations? What are the minimum fields required in client records (intake details, follow-ups, notes) for social prescribing? Informs which fields are categorized as Personal Information (PI) or Personal Health Information (PHI) Confirm Tech Stack for Link Log: <ul style="list-style-type: none"> Backend - Django + PostgreSQL Frontend - Next.js (ReactJS), HTML, CSS, JS Hosting - AWS ecosystem (EC2, Terraform...) Auth - For demo, just basic JWT but for prod its AWS Cognito (Or suggest WorkOS, Clerk, Vanta, etc.) De-identify PI - Microsoft Purview <p>Frontstage UI Screens / Live Prototype Co-Design (if time):</p> <p>LW Task</p> <ul style="list-style-type: none"> have user import a CSV to LinkLog to populate the database, and to see their most important follow ups at 3/6/12 month mark <ul style="list-style-type: none"> Navigate to Form Management to fill out CTT Import data from existing client-level data in LinkLog to allow auto-population of some CTT fields Review CTT form (pre: fills auto-populated data), fill out any remaining fields Send form to OACAO, check out options to download or view in "legacy" form. <p>OACAO Task</p> <ul style="list-style-type: none"> View and filter individual report submission from SALCs View multiple SALC level aggregated data (analytics dashboard) 	<p>Qual:</p> <ul style="list-style-type: none"> Do our stakeholders think this would make: <ul style="list-style-type: none"> data tracking easier for SALC workers? CTT reporting easier for SALC workers? Aggregation of CTT form data easier for OACAO? Do our stakeholders think this would be implementable for SALCs given that they have operate with a wide variety of documentation practices? Probe on what the stakeholders think about the current direction of our design solution <p>Follow-up questions:</p> <ul style="list-style-type: none"> How would you at OACAO ideally want to receive aggregated data? (i.e., raw spreadsheets, dashboards with charts/tables, etc.) Would it be viable to continue designing the standardization of other Appendix forms that SALC workers would be filling out (prioritizing the ones that host data necessary to feed into the auto-fill feature for the CTT, as well as prioritizing the forms that are required to be sent to OACAO via SurveyMonkey)

Co-Design Session 2		
Stimuli	Tasks	Measurement
<ul style="list-style-type: none"> Updated version of Session 1 stimuli: <ul style="list-style-type: none"> LinkLog CSV structure Front stage Prototype: <ul style="list-style-type: none"> SALC View: Digitized CTT form and automated filling feature OACAO View: aggregated data view Backstage: program script to auto-populate digitized CTT form from SALC client-level data <ul style="list-style-type: none"> Other digitized Appendix forms (if got the green light to continue with that direction) OACAO dashboard view (reporting) Updated LinkLog CSV structure based on feedback, if any 	<ul style="list-style-type: none"> Re-evaluate data structure + tech stack based on our changes made from S1, if any Run through Frontstage prototype if did not have time from Session 1 (and any updates based on feedback from S1, if any) 	<p>Qual:</p> <ul style="list-style-type: none"> Did the feedback we implemented match your expectations? Did it improve the functionality + experience <ul style="list-style-type: none"> Now that it's more fleshed out, how do they feel about the implementability of it? Does our tech stack decisions match your expectations of PHIPA compliance? If yes, do you think this stack would be viable to implement based on the quantity of estimated client data and your budget? What future directions would they want to take this in, if at all?

Hypothesis	Risks	Ideal Future Outcomes
<ul style="list-style-type: none"> Digitizing the Common Tracking Tool (CTT) and automating its population for Link Workers (LWs) from row-level client data within LinkLog will reduce the reporting burden for LWs, and ensure higher data fidelity and standardization for OACAO provincial reporting OACAO view and report generation will help OACAO turn raw data from SALCs into actionable insights to show to others and get funding. It also centralizes their reporting platform with the LW's reporting platform, removing duplicate workflows i.e. filling on paper + SurveyMonkey. The digitized CTT and report generation to OACAO all within the LinkLog environment will reduce task duplication and data consolidation effort on both LWs and OACAO staff, as well as replace the need for the external survey platform SurveyMonkey. 	<ul style="list-style-type: none"> LWs accustomed to paper, basic Excel, or are technologically-resistant may dislike record-keeping and form completion in LinkLog Aggregating data for OACAO must strictly adhere to PHIPA-compliance Data Integrity: Inaccurate or non-standardized entry in row-level fields (e.g., "Doctor" vs. "Primary Care Provider") will break auto-population logic. This auto-population feature of the digitized CTT relies on the assumption that it can pull from data that is stored on the LinkLog platform which includes aggregated client-level data, referral sources and outcomes, subsidy spending, and HR data. 	<p>[Imagine it has been implemented already after 6 months]</p> <ul style="list-style-type: none"> A seamless workflow where LWs manage daily operations in LinkLog, and the mandatory OACAO CTT (and other necessary forms) is automatically generated, validated, and ready for submission with minimal manual consolidation required for quantitative fields. LinkLog has the infrastructure to support data storage in online servers for SALCs and OACAO, and is PHIPA-compliant. OACAO is able to aggregate all the data from different SALCs into reports that allow OACAO a more efficient and standardized way to consolidate the outcomes of the LWZ program

Figjam File:

<https://www.figma.com/board/p4x4Ne92DYQypBqv7GnaXR/INF2224-Group-2?node-id=0-1&t=FSEHSjxBOKk8qdEZ-1>

Process

Data Shaping

To help build relational database

Google Sheet

<https://docs.google.com/spreadsheets/d/1gJhnmyvtibX2mN5RddBI0LHpOTohAf9jBhhKX0bC3RQ/edit?usp=sharing>

Google Drive Folder

https://drive.google.com/drive/folders/1YIDAjaXjPn5dPXjTYDEpa_iZPhd7c2Pw?usp=drive_link

Variable Name	CTT Ref	Data Type	Possible Fields / Example Response	Auto-Population Logic	Auto-Population Variable Mapping (based on past Group 3 LinkLog files and current OACAO Appendix Forms)
count_ref_chc	1.1	Integer	e.g., 12	COUNT clients where Referral_Source_Type = "CHC"	Referral_Source_Type from SP_Clients.csv
count_ref_paramedic	1.1	Integer	e.g., 5	COUNT clients where Referral_Source_Type = "Community Paramedic"	Referral_Source_Type from SP_Clients.csv
count_ref_pharmacist	1.1	Integer	e.g., 3	COUNT clients where Referral_Source_Type = "Pharmacist"	Referral_Source_Type from SP_Clients.csv
count_ref_hospital	1.1	Integer	e.g., 20	COUNT clients where Referral_Source_Type = "Hospital"	Referral_Source_Type from SP_Clients.csv
count_ref_primary_care	1.1	Integer	e.g., 45	COUNT clients where Referral_Source_Type = "Primary Care provider"	Referral_Source_Type from SP_Clients.csv
count_ref_mental_health	1.1	Integer	e.g., 8	COUNT clients where Referral_Source_Type = "Mental Health Workers"	Referral_Source_Type from SP_Clients.csv
count_ref_other_type	1.1	Integer	e.g., 4	COUNT clients where Referral_Source_Type = "Other"	Referral_Source_Type from SP_Clients.csv
total_new_referrals	1.1	Integer	e.g., 97	SUM of all 1.1 counts	all CTT 1.1 variables
names_ref_chc	1.2	List/Text	e.g., "Centretown CHC, Sandy Hill CHC"	UNIQUE LIST of Referral_Source_Name where Referral_Source_Type = "CHC"	Ref_Partner_Name from SP_Clients.csv (doesn't currently exist, but we can add this as a column and work based on the assumption that LWs would input this data for each client)
names_ref_paramedic	1.2	List/Text	e.g., "Ottawa Paramedic Service"	UNIQUE LIST of Referral_Source_Name where Referral_Source_Type = "Community Paramedic"	Ref_Partner_Name from SP_Clients.csv (doesn't currently exist, but we can add this as a column and work based on the assumption that LWs would input this data for each client)
names_ref_hospital	1.2	List/Text	e.g., "The Ottawa Hospital"	UNIQUE LIST of Referral_Source_Name where Referral_Source_Type = "Hospital"	Ref_Partner_Name from SP_Clients.csv (doesn't currently exist, but we can add this as a column and work based on the assumption that LWs would input this data for each client)
names_ref_other	1.2	List/Text	e.g., "Jane Doe (Physiotherapy)"	UNIQUE LIST of Referral_Source_Name where Referral_Source_Type = "Other"	Ref_Partner_Name from SP_Clients.csv (doesn't currently exist, but we can add this as a column and work based on the assumption that LWs would input this data for each client)
num_unique_primary_care	1.3	Integer	e.g., 15	COUNT DISTINCT Referral_Source_Name where Referral_Source_Type = "Primary Care provider"	Ref_Partner_Name from SP_Clients.csv (doesn't currently exist, but we can add this as a column and work based on the assumption that LWs would input this data for each client)
num_unique_mental_health	1.3	Integer	e.g., 4	COUNT DISTINCT Referral_Source_Name where Referral_Source_Type = "Mental Health Workers"	Ref_Partner_Name from SP_Clients.csv (doesn't currently exist, but we can add this as a column and work based on the assumption that LWs would input this data for each client)
num_unique_pharmacists	1.3	Integer	e.g., 2	COUNT DISTINCT Referral_Source_Name where Referral_Source_Type = "Pharmacist"	Ref_Partner_Name from SP_Clients.csv (doesn't currently exist, but we can add this as a column and work based on the assumption that LWs would input this data for each client)
count_potential_partners	1.4	Integer	e.g., 10	Manual entry	Requires new SALC-level outreach log; there does not seem to be a form/template provided by OACAO for SALCs to track this. SALCs seem to have different unstandardized ways of tracking this metric, so it might be best to keep this manual entry for now.
successful_referral_notes	1.5	Text	"Our local CHC includes a flyer in every intake packet."	Manual entry	No auto-population; open-ended response
count_participation_result	2.1	Integer	e.g., 65	COUNT clients where Enrollment_Date >= 2025-04-01 AND <= 2026-03-31	Intake_Date from SP_Clients.csv (current LinkLog data names it "Enrollment_Date", but it could be better named to "Intake_Date" to better represent what exists in Appendix F - Client Information Form)
count_not_interested	2.2	Integer	e.g., 22	COUNT clients where Intake_Outcome = "Declined"	Intake_Outcome from SP_Clients.csv (currently this column does not exist because it would require SALCs to be tracking clients that did not even respond to the initial contact, or did not want to move forward with the referral, which wouldn't make a lot of sense to keep a record of row-level data for these clients if they never officially joined in the first place. We could introduce this column based on the assumption that LWs would record this data for the purposes of knowing this is a required field in the CTT.)
count_dropouts	2.3	Integer	e.g., 10	COUNT clients where Client_Status = "Discontinued"	Client_Status from SP_Clients.csv (I think currently the variable name is just Status, so make sure we keep it consistent throughout)
count_new_subsidies	2.4	Integer	e.g., 30	COUNT clients where Subsidy_Status = "Yes" AND Intake_Date >= 2025-04-01	Subsidy_Status from SP_Clients.csv (doesn't currently exist, but we can add this as a column and assume LWs are tracking this data, as they would have had to input it during the Appendix F - Client Information Form)
count_ongoing_subsidies	2.5	Integer	e.g., 15	COUNT clients where Subsidy_Status = "Yes" AND Intake_Date < 2025-04-01	Subsidy_Status from SP_Clients.csv (doesn't currently exist, but we can add this as a column and assume LWs are tracking this data, as they would have had to input it during the Appendix F - Client Information Form)
subsidy_spend_areas	2.6	Multi-select	Membership, Registration, Supplies, Transportation, Meals, Other	Manual selection	No auto-population for now, unless we're building out something to classify subsidy spending items into these categories, from wherever they might be tracking that info, but this is definitely out of scope.
count_staff_involved	3.1	Integer	e.g., 3	Manual entry (Org Settings)	This is HR information; too many unknowns to assume we can auto-populate these fields from anything right now.
total_staff_12w_hours	3.2	Decimal	e.g., 450.5	Manual entry (Org Settings)	This is HR information; too many unknowns to assume we can auto-populate these fields from anything right now.
has_paid_sp_staff	3.3	Boolean	Yes, No	Manual entry (Org Settings)	This is HR information; too many unknowns to assume we can auto-populate these fields from anything right now.
paid_sp_hours_weekly	3.3	Decimal	e.g., 15	Manual entry (Org Settings)	This is HR information; too many unknowns to assume we can auto-populate these fields from anything right now.
count_vla_engaged	3.4	Integer	e.g., 5	Manual entry (Org Settings)	This is HR information; too many unknowns to assume we can auto-populate these fields from anything right now.
count_other_volunteers	3.5	Integer	e.g., 2	Manual entry (Org Settings)	This is HR information; too many unknowns to assume we can auto-populate these fields from anything right now.
total_volunteer_hours	3.6	Decimal	e.g., 1200	Manual entry (Org Settings)	This is HR information; too many unknowns to assume we can auto-populate these fields from anything right now.
count_students	3.7	Integer	e.g., 2	Manual entry (Org Settings)	This is HR information; too many unknowns to assume we can auto-populate these fields from anything right now.
student_programs	3.7	Multi-select	e.g., "Nursing, Social Work"	Manual entry (Org Settings)	This is HR information; too many unknowns to assume we can auto-populate these fields from anything right now.
student_study_levels	3.7	Single-select	College diploma, Applied degree, Undergraduate, Graduate	Manual entry (Org Settings)	This is HR information; too many unknowns to assume we can auto-populate these fields from anything right now.
count_partner_institutions	3.8	Integer	e.g., 2	Manual entry (Org Settings)	This is HR information; too many unknowns to assume we can auto-populate these fields from anything right now.
names_partner_institutions	3.8	Text	e.g., "Algonquin College, University of Ottawa"	Manual entry (Org Settings)	This is HR information; too many unknowns to assume we can auto-populate these fields from anything right now.
barriers_faced	4.1	Text	"High staff turnover at referring clinic."	Manual entry	No auto-population
barrier_solutions	4.1	Text	"Met with clinic lead to re-train new staff."	Manual entry	No auto-population
strengths_leveraged	4.2	Multi-select	Other funding, In-kind, Board buy-in, Volunteer support, Other	Manual entry	No auto-population
strengths_description	4.2	Text	"Our board chair is a retired GP who advocates for us."	Manual entry	No auto-population
sustainability_needs	4.3	Text	"More stable funding for the coordinator role."	Manual entry	No auto-population
additional_feedback	4.4	Text	"The new dashboard has saved us hours of work."	Manual entry	No auto-population

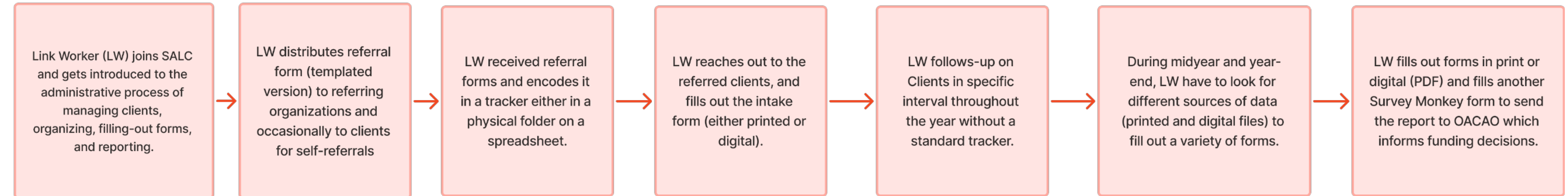
Process

Task Flows

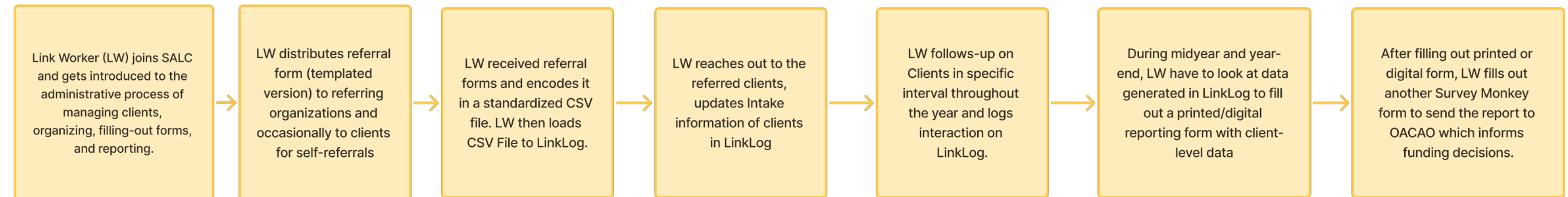
Initial User Task Flows

High-level Overview of the User (Link Worker) Flow / Process

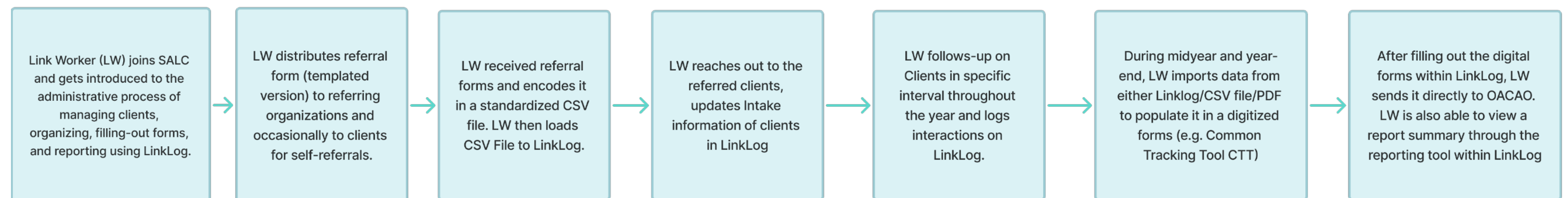
Current Manual Process without Linklog



Proposed User Flow by Group 3 (Winter 2026) with LinkLog V1/V2 focusing on Client Management



Proposed To-be User Flow by Group 2 with LinkLog V3 focusing on V2 Feature Updates, Form Management and Reporting



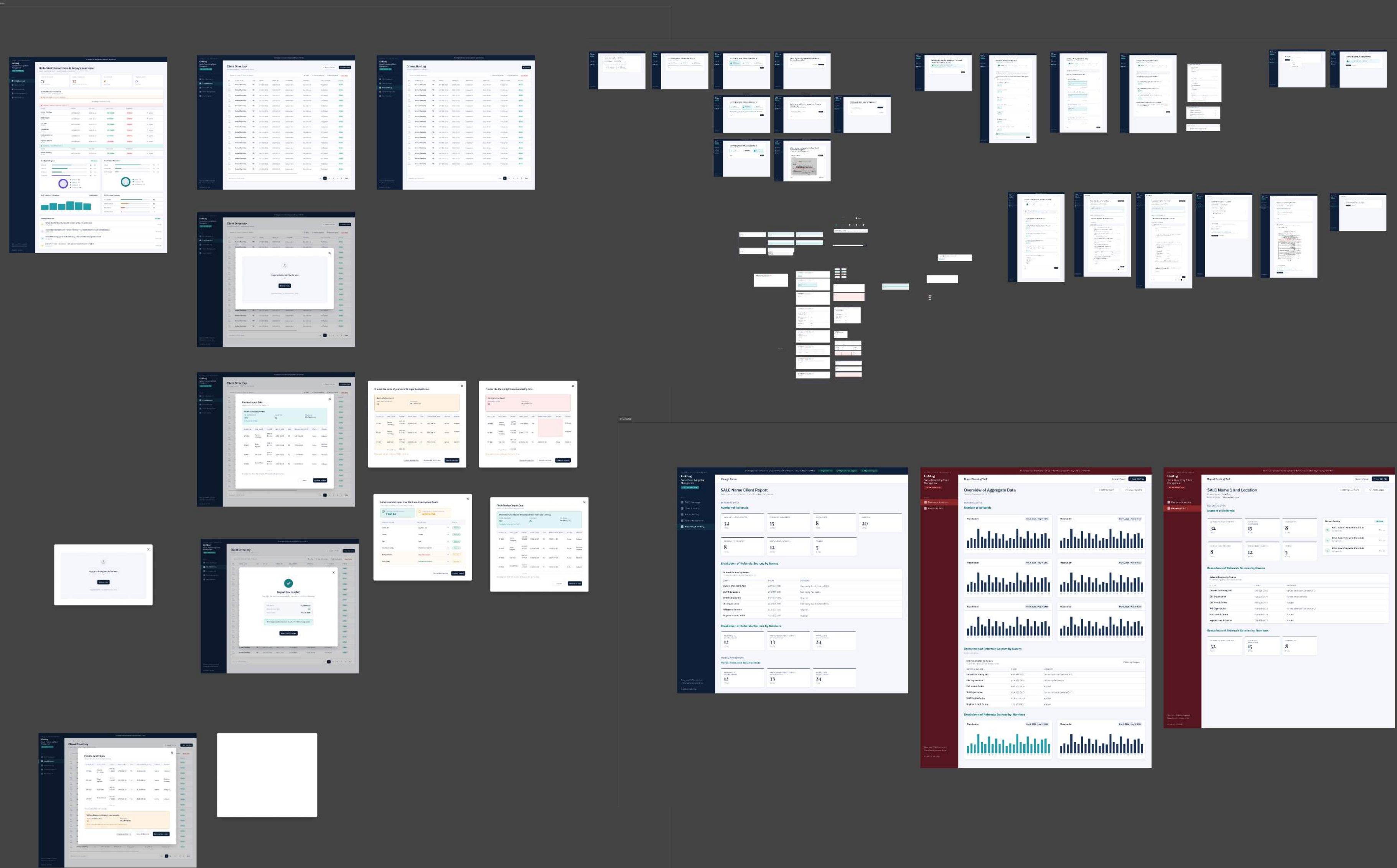
Figjam File:

<https://www.figma.com/board/p4x4Ne92DYQypBqv7GnaXR/INF2224-Group-2?node-id=0-1&t=FSEHSjxBOKk8qdEZ-1>

Process

Design Iterations

Design and Prototypes in Figma



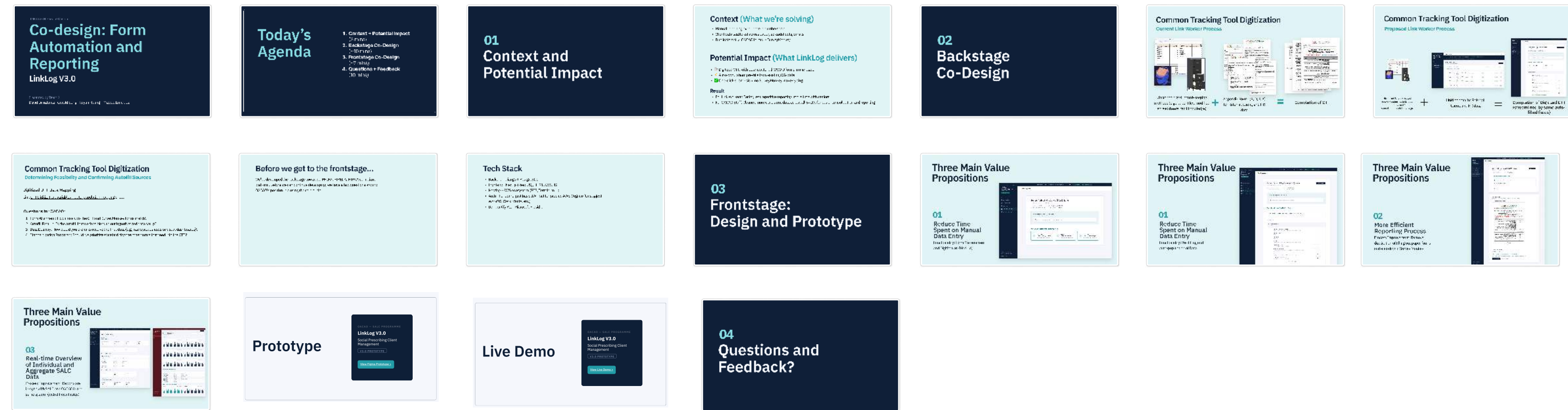
Figma File:

<https://www.figma.com/board/p4x4Ne92DYQypBqv7GnaXR/INF2224-Group-2?node-id=0-1&t=FSEHSjxBOKk8qdEZ-1>

Process

Co-Design 1 and 2

Presentation and Notes



Co-Design Notes and Feedback

Notes for iteration based on their feedback

Frontstage:

- Jenn has mentioned staff + volunteer hours again so it seems important for them to track, but they said it does not have to be accurate, it's really a ballpark figure that SALCs provide; possible solution: drop down menus of buckets (<5, 6-10, 11-20, 21-35, 36+)
- However, they mentioned that some SALCs estimate hrs per week and some estimate hrs per year
 - introduce new question: "does your facility have a dedicated staff member for the L2W program who commits 30+ hours/week?"
 - "note: would have to add new variable in backstage to track this question"
- "Admin view": emphasized deidentified info; some uncertainty ab pros/cons of dashboards vs raw files but Joe has mentioned specifically that it's better to receive raw data; this could inform our priority direction for the OACAO view for now
- Dropdown options while still allowing for search + custom input for referral sources; e.g., combobox
- Search function box with dropdown; as they input their search, the dropdown options will adjust, while keeping "Other" constant at the bottom. If selected "Other", introduce adjacent field for them to type in a text box

Backstage:

- Joe has mentioned in the future of this moving to a relational database (in the context of autofill options), so the data schema should do some work in aiding this.
- "Aiming for a compliant platform is definitely ideal but I don't think feasible; most SALCs would not meet the technical requirements for Level 4 security. Ultimately a solution would require a third party to host this in the (Canadian) cloud."
- 12 other sources (name and individual role) need to be separated into two different nullable columns in the csv file

Both:

- Loneliness metrics (particularly at 6 months) seem pretty important as Jenn mentioned it again here; perhaps the next best direction would be designing the client information form, including the workflows for recording that info at all relevant touchpoints (i.e., first visit, 3-6-12 months, discontinuation)
- Update dates for next fiscal year (April 1 2026 to Mar 31 2027)

Session 2 ideas:

Topics of Discussion

- Their question about what OACAO see vs SALC workers: yes you're right, OACAO would not be seeing any PII or information that is irrelevant to your reporting and tracking metrics. That's why we've been asking about what metrics you guys at OACAO prioritize and would like to know, as your answers have been very helpful in informing our decisions on what data to include in your (OACAO) view and what just stays in the SALC view.
 - Yes, interactions and follow-up reminders will only be for SALCs to view and manager; this is not something that will be reporting to OACAO. So far what we've built for OACAO to hypothetically receive is basically a 1:1 mapping of the CTT form.
- They want a walk through of the forms management section and where the data would be pulling from (currently some from client directory / add new client but not all)
- Answer: yes it's from data they would input as they input in the client directory fields, some have not been built out yet because they're information that is recorded in many unstandardized way on SALCs ends (some from other appendix forms, some unclear but we can infer anything from paper files to digital custom spreadsheets); eg hr info, subsidy spending, qual open ended questions in section 4.
- Standardization roadmap; basically designing more of the appendix forms, specifically ones that are either or both of the following:
 - Used by SALCs to record data that they will eventually need for the CTT and
 - Required by SALCs to report to OACAO in SurveyMonkey
- Joe's master list comment

Things to Walk-through:

- live demo of SALC view
- Live demo of OACAO view

Notes in Co-Design 2:

Topics of Discussion

- Discussion Point: [OACAO would not be seeing any PII or information that is irrelevant to your reporting and tracking metrics. That's why we've been asking about what metrics you guys at OACAO prioritize and would like to know, as your answers have been very helpful in informing our decisions on what data to include in your (OACAO) view and what just stays in the SALC view.]
Feedback: No questions/feedback on that end
- Discussion Point: [They want a walk through of the forms management section and where the data would be pulling from.]
Feedback: Financial Forms are harder to integrate but easy to fill-out (least of their problems)
- Question: Which Forms do you want to prioritize?
 - CTT and Client Information Forms
 - Reducing the Client Info from 3-6-12 to just the 6 and 12-month intake
 - 3 months is just informal from OACAO, so they can just move to the 6-month and 12 month intake to the 'formal reporting'
 - OACAO is interested if the LW or SALCs did the follow-up: OACAO just needs the impact statements within the 6 and 12 month period
 - Still interested to know more about the loneliness metrics
- Live Demo
 - Joe: Digitized version of the form in PDF, what's the value here to before? (Clarified by Gerold that it is only one of the views available for LWs)
- Nice to have the raw data from OACAO for analysis but they would like to see the graphs/charts and analytics without having to do anything on their end
- Organize in a way that it is clear that some fields are auto-filled, required, and not yet filled
- If I had 0 referrals, it would be helpful for OACAO to know that it is 0 and not just empty.
- Flags/notif that some fields need to be filled out

• Pulling data from client directory; Add the info from 3-6-12 and Loneliness Metrics in the Client Directory

Q: Where do you want to take this next?

- Proposed:
 - Flushing out assumptions (Updating Client Directory, Digitizing Client Info)
 - 2nd direction: keeping the assumptions and focusing on building the reporting side
- Would be lovely for the SALC to not only tracking their workflow but also be able to input what exactly they need to report by the end of the year (excluding the Financial Report)
- Most Important Parts of the Report: 1) the 3-6-month in the Client Info; 2) Loneliness Metrics: Qualitative Data, 6-12months
- OACAO can just receive raw data file
- Prioritizing the LW over building the analysis

Co-Design Presentation:

<https://www.figma.com/slides/T0GwbuQg5PaY6Nbwi9Zp5I/FINAL-PRESENTATION?node-id=1-1749&t=xpCOvmYW2NXTAeXw-0>

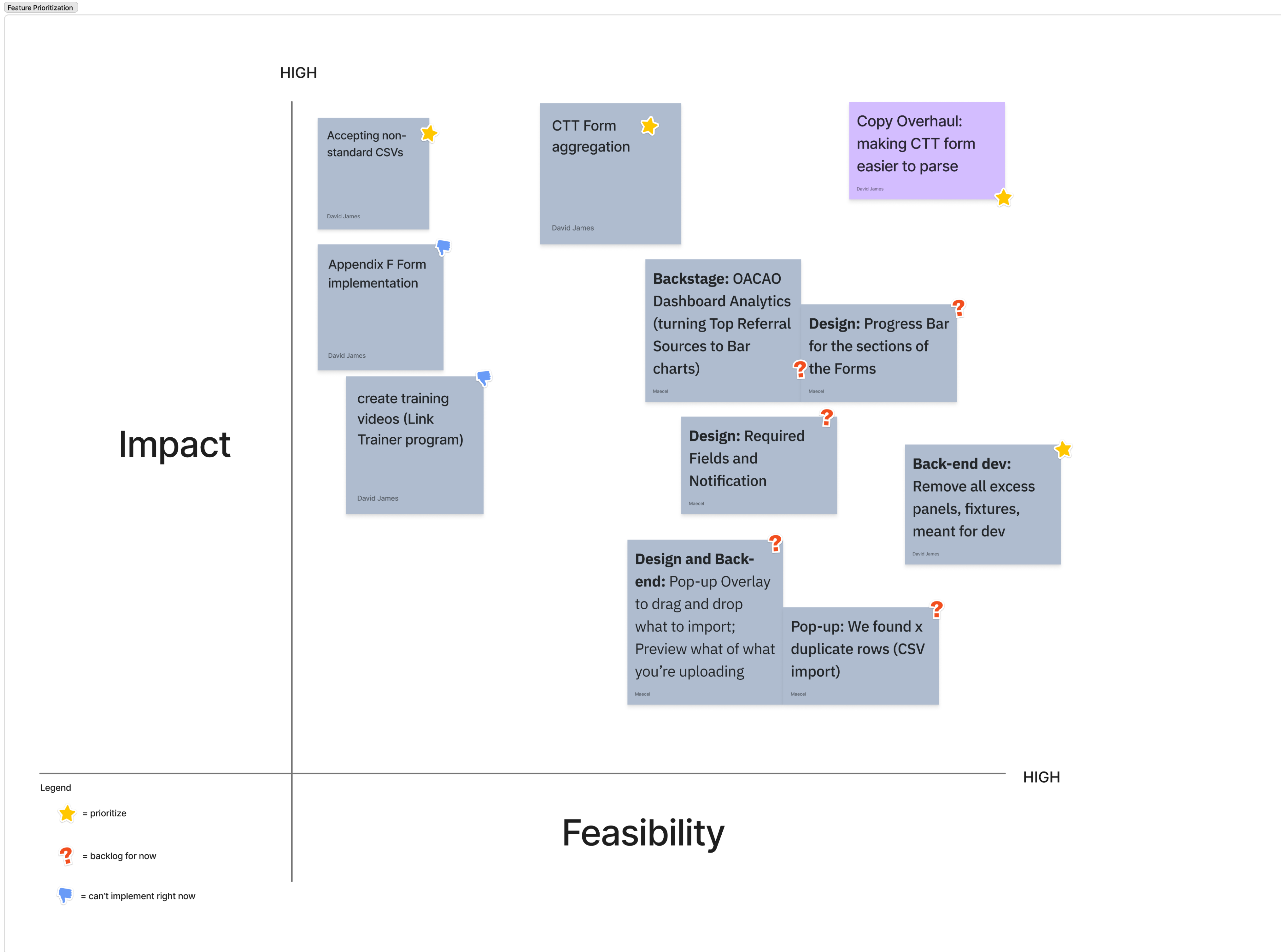
Process

Feature Prioritization

Impact x Feasibility,
guiding what we
decided to implement

Figjam File:

<https://www.figma.com/board/p4x4Ne92DYQypBqv7GnaXR/INF2224-Group-2?node-id=0-1&t=FSEHSjxBOKk8qdEZ-1>



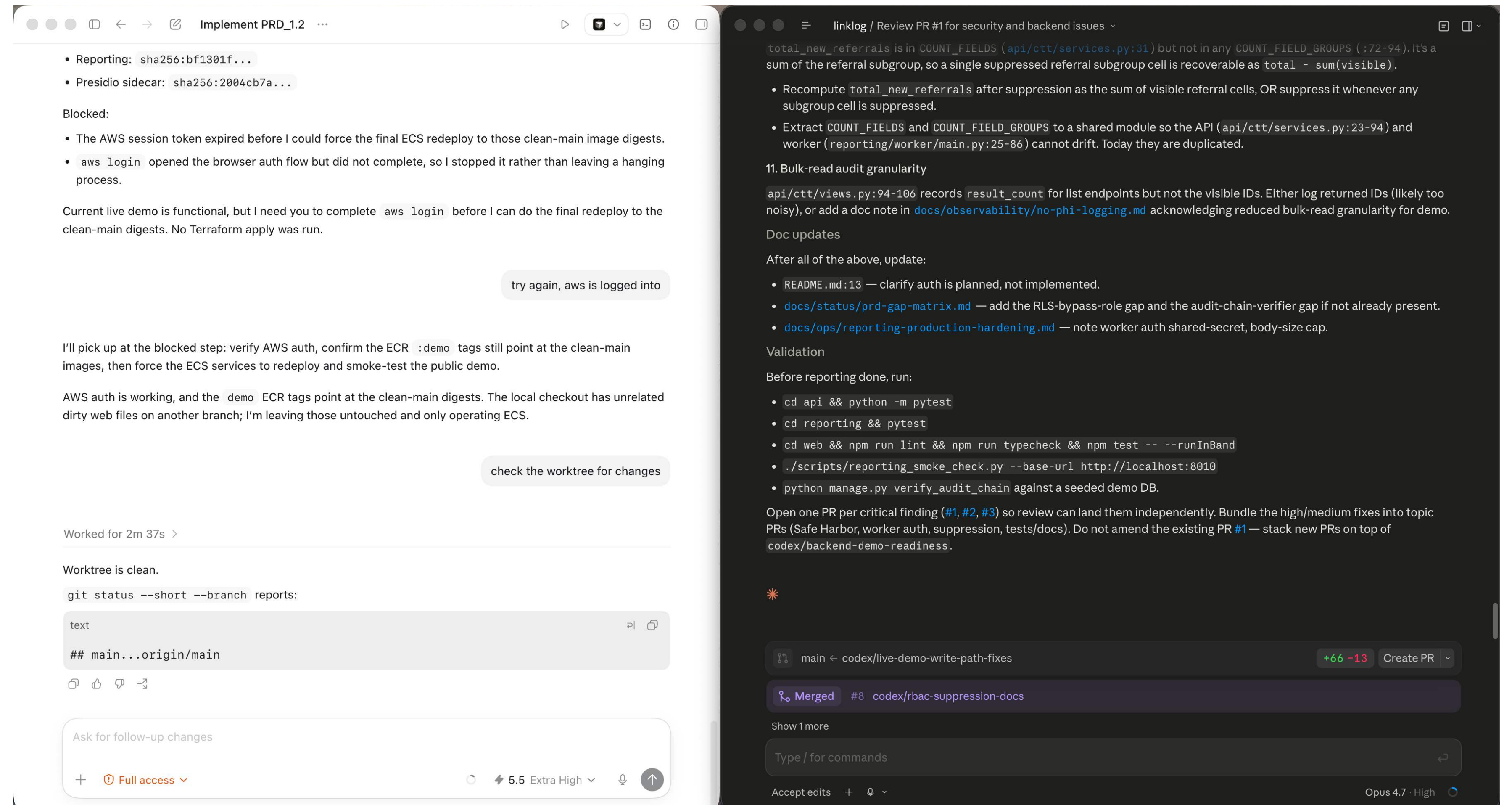
Process

Vibe Coding for Live Demo

Multi-Agent Validation for Vibe Coding: AI use in building the Live Demo

Privacy and Security Brief

[LinkLog privacy & security requirements - Google Gemini Deep Research](#)



Screenshot. David using Codex to write the backend and Claude Code to review PR's.

Process

Lessons Learned

Some thoughts around what we learned doing service design

You don't have to implement every feature. 80% is good enough!!!

Thinking about outcome rather than solutions.

Rapid Prototyping from ideating, Design to Shipping Features and Working Demo can happen all at the same time

Scoping the project down to fit the limited amount of time that we have

We needed to looking at the bigger picture (in 10,000 ft view) of the whole service to see where process improvement can come in

Sometimes you have to work under assumptions given the limited of time and lack of timely feedback

Service Blueprint is very helpful in identifying all the processes and areas that can be improved in an organization

Finding clarity in an ambiguous problem space takes time, but the time spent in finding clarity becomes a strong foundation for the proposed solutions

Process

Sources, Tools and AI Used

All ideas, storytelling, and live demo prototype creation are done by the group originally. AI was only used as aid to generate some of the assets more efficiently after brainstorming original ideas and finalizing direction within the group. All Tools/AI used and usage are listed in the table below.

Tool Used	Usage
StoryTribe	Quickly generate assets/images that correspond to the team's proposed customer journey
Figma Make	Populating design system with potential user flows to several screens at a time
Gemini	Consolidating interview transcripts and summaries to identify themes and supporting statements for demonstrating our problem areas ++ Agent for deep research on Ontario and Canada based policy
Claude	Used to review PR's pushed by Codex agents, and for front end: turning figma frames to code
Codex	Used to code the backend + and write test suites + and push live images to AWS via terraform

Team's Quick Links

Figjam

<https://www.figma.com/board/p4x4Ne92DYQypBqv7GnaXR/INF2224-Group-2?node-id=0-1&t=FSEHSjxBOKk8qdEZ-1&fuid=1554206700935652838>

Google Drive

https://drive.google.com/drive/folders/1ZuhXrdcaWC8SsgiFhJUoNyr0jPP8jUn7?usp=drive_link

Figma

<https://www.figma.com/design/7U9IvLQG7rfSYH0cRe8djp/INF2224H-LinkLogV3-Design-Prototype?node-id=258-2308&t=p8Q6YQdgWd6OSjif-1>