



Highbanks Society User Guide

Entering and Changing Data



PolicyWise
for Children & Families

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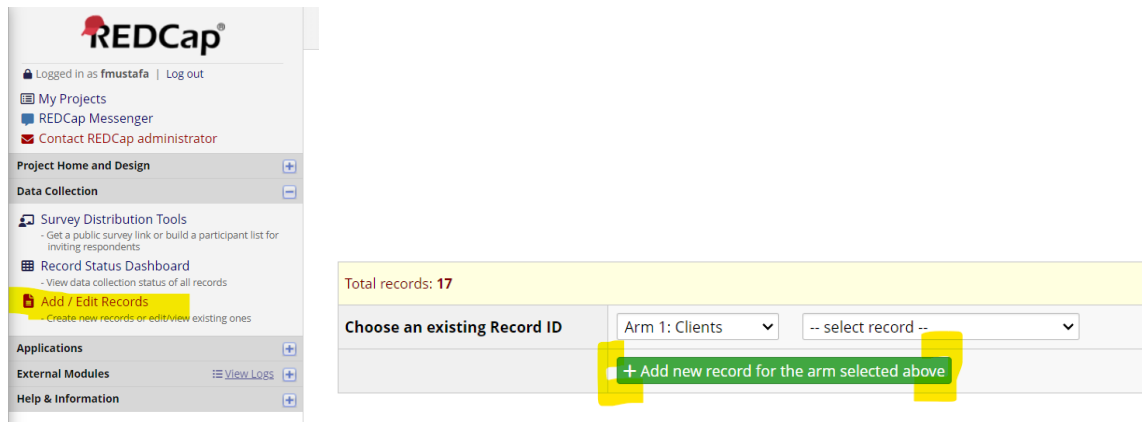
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Arm 1: Clients

Adding a new client – Complete the application form for the client

[Video overview here from RedCap about Data Entry](#)

To add a new client during an initial intake interview, click on Add/Edit Records on the left menu bar in the Data Collection section. Select Arm 1: Clients in the drop-down box, and then click the green +Add new record button.

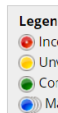


You will see a new Record Home Page for this client, with a list of all the available forms. The Application Form is the first one in the list and must be completed before moving on to any other forms. This form will collect the information needed to determine the client's eligibility for the program. Click the grey circle button to the right of the Application Form to get started.

Record Home Page

Record "18" is a new Record ID. To create the record and begin entering data, click the green circle button.

The grid below displays the form-by-form progress of data entered for the currently selected record. You may click on the colored status icons to access that form/event. If you wish, you may modify the events below by navigating to the [Define My Events](#) page.



NEW Record ID 18
Arm 1: Clients

Data Collection Instrument	Data_Entry_Clients
Application Form (survey)	
Consent Form: Services (survey)	
Consent Form: Collection and Use of Data	
Needs Assessment: Client Contact Info	

The size and colour of the text on the form will indicate the type of information:

Welcome! We appreciate your interest in our services. We know what you need so we can help you. Keeping your information safe	Dark blue text- Information
Demographic Details	Large black text- Section headers
<i>We ask for your demographic information to help diverse backgrounds of our applicants.</i>	Grey italic text- Instructions
Emma House works with other organisations to ensure all applicants on our waitlist receive the support they need. We would like your consent to share your application information with relevant services.	Light blue text- consent
Relevant information from other forms The following information was taken from the 'Application Form': First name: Elizabeth	Green text – information that is taken from other forms

Adding a new client – Send a link for the client to complete the application form

Note: If you send the survey as a link to the client, the 'Staff Only' section of the survey will not show on their linked version. You will need to use the [Update an Existing Client](#) instructions to complete the 'Staff Only' section of the form separately.

If the client prefers to complete the application form themselves, you can send them a link by email to complete the form. They must complete the survey in one sitting; it can't be saved to return to at another time. They cannot submit without completing all the required fields.

To get a link for the form:

1. Click on Survey Distribution Tools under the Data Collection header in the left menu bar
2. Check that Arm 1: Client is selected in the drop-down box titled 'This survey link below applies only to'
3. Click the copy icon beside the survey link address. This is the link you will send to the client by email so they can complete the form. This will only send them the link to the Application Form.

The screenshot shows the REDCap web interface. On the left is a sidebar menu with categories: Project Home and Design, Data Collection, Applications, External Modules, and Help & Information. Under Data Collection, 'Survey Distribution Tools' is highlighted. The main content area is titled 'Calgary Foundation: Highbanks' with a PID of 70. Below this is a sub-header 'Survey Distribution Tools' with three tabs: 'Public Survey Link' (selected), 'Participant List', and 'Survey Invitation Log'. A paragraph explains that using a public survey link is the simplest way to collect responses, but notes that responses are collected anonymously unless the survey asks for identifying data. It instructs users to copy the URL and paste it into an email. Below this, a dropdown menu shows 'The survey link below applies only to' with the selected option being '"Highbanks Society Application Form" - Data Entry Clients (Ar...'. The 'Public Survey URL:' is displayed as 'https://idea-redcap.research.athabascau.cloud/surveys/?s=YY...' with a copy icon. A checkbox for 'Protect the public survey using the Google reCAPTCHA feature' is present. At the bottom, there are two sections: 'Link Actions' with buttons for 'Open public survey', 'Open public survey + Log out', 'Send me URL via email', and 'Survey Access Code or QR Code'; and 'Link Customizations' with buttons for 'Get Short Survey Link', 'Create Custom Survey Link', and 'Get Embed Code'.

REDCap®

Logged in as **fmustafa** | Log out

My Projects

REDCap Messenger

Contact REDCap administrator

Project Home and Design

Data Collection

Survey Distribution Tools

Get a public survey link or build a participant list for inviting respondents

Record Status Dashboard

View data collection status of all records

Add / Edit Records

Create new records or edit/view existing ones

Applications

External Modules

View Logs

Help & Information

Calgary Foundation: Highbanks PID 70

Survey Distribution Tools

Public Survey Link Participant List Survey Invitation Log

Using a public survey link is the simplest and fastest way to collect responses for your survey. You may obtain the survey link below to email it to your participants. Responses will be collected anonymously (unless the survey contains questions asking for identifying data from the participant). **NOTE:** Since this method uses a single survey link for all participants, it allows for the possibility of participants taking the survey multiple times, which may be necessary in some cases.

To obtain the survey link, copy the URL below and paste it into the body of an email message in your own email client. Your email recipient(s) can then click the link to begin taking your survey.

The survey link below applies only to "Highbanks Society Application Form" - Data Entry Clients (Ar...

Public Survey URL: <https://idea-redcap.research.athabascau.cloud/surveys/?s=YY...>

☐ Protect the public survey using the Google reCAPTCHA feature

Link Actions

Open public survey

Open public survey + Log out

Send me URL via email

Survey Access Code or QR Code

Link Customizations

Get Short Survey Link

Create Custom Survey Link

Get Embed Code

Adding a new client – Create a QR Code or Survey Access Code

Note: If you send the survey as a QR Code or Survey Access Code to the client, the 'Staff Only' section of the survey will not show on their linked version. You will need to use the [Update an Existing Client](#) instructions to complete the 'Staff Only' section of the form separately.

If the client prefers to complete the application form themselves, you can have them scan a QR code or print them a Survey Access Code to complete the form. They must complete the survey in one sitting; it can't be saved to return to at another time. They cannot submit without completing all the required fields.

1. Click on Survey Distribution Tools under the Data Collection header in the left menu bar
2. Check that Arm 1: Client is selected in the drop-down box titled 'This survey link below applies only to'
3. Click the button for Survey Access Code or QR Code

REDCap
Logged in as **fmustafa** | Log out
My Projects
REDCap Messenger
Contact REDCap administrator

Project Home and Design
Data Collection
Survey Distribution Tools
Record Status Dashboard
Add / Edit Records

Calgary Foundation: Highbanks PID 70

Survey Distribution Tools
Public Survey Link | Participant List | Survey Invitation Log

Using a public survey link is the simplest and fastest way to collect responses for your survey. You may obtain the survey link below to email it to your participants. Responses will be collected anonymously (unless the survey contains questions asking for identifying data from the participant). **NOTE:** Since this method uses a single survey link for all participants, it allows for the possibility of participants taking the survey multiple times, which may be necessary in some cases.

To obtain the survey link, copy the URL below and paste it into the body of an email message in your own email client. Your email recipient(s) can then click the link to begin taking your survey.

The survey link below applies only to **"Highbanks Society Application Form" - Data_Entry_Clients (Ar**

Public Survey URL: <https://idea-redcap.research.athabascau.cloud/surveys/?s=YY...>

☐ Protect the public survey using the Google reCAPTCHA feature

Link Actions
Open public survey
Open public survey + Log out
Send me URL via email
Survey Access Code or QR Code

Link Customizations
Get Short Survey Link
Create Custom Survey Link
Get Embed Code

You can have the client scan the QR code on the screen, or you can use the Print for Respondent button to print this page. It gives them the option to use the QR code or to visit the website listed and enter the Survey Access Code. This QR code and Survey Access Code can be used for every client and do not expire.

 **Survey Access Code or  QR Code**

Survey title: **"Highbanks Society Application Form"**

A Survey Access Code and a QR Code both allow respondents to begin a survey on another computer or device without someone having to email them an invitation. This is especially useful if the respondent is currently nearby or if you will be sending the survey invitation to a physical mailing address (i.e. 'snail mail'). You may click the Print button at the bottom if you wish to print out the instructions for the respondent.

 **Enter the Survey Access Code**

To allow a respondent to begin this survey, have them navigate to the URL below and enter the survey access code. The code is permanent and will never change. (Note: The web address is the same for all projects and surveys, so you may bookmark the address on a computer or device to quickly return to it multiple times.)

1.) Go to this web address:

<https://idea-redcap.research.athabascau.cloud/surveys/>

2.) Then enter this code:

7R9JNCN3W

OR

 **Generate Short Code**

Alternatively, you may generate a shorter, temporary code that will expire after only one use or after one hour has passed.

Generate Short Code

 **Scan the QR Code**

The survey link has been converted into a QR code, which can now be scanned by a device that has an app capable of reading QR codes. Once the QR code below is scanned, it should take the respondent directly to the survey in a web browser.



Print for Respondent

Close

Updating an existing client

Use these instructions to update information on a form that has already been filled out for a client, or to add new forms related to a client after the initial Application Form has been completed.

1. Open the [Record Status Dashboard](#)
2. Select Arm 1: Clients
3. Ensure the Active Clients Dashboard is displayed (or the correct dashboard for your needs) in the Dashboard Displayed box.

Dashboard displayed: **Active Clients** ▼ Modify Create custom dashboard

Displaying record Page 1 of 1: "1" through "11" ▼ of 8 records ALL (8) ▼ records per page

+ Add new record for this arm

Displaying: [Instrument status only](#) | [Lock status only](#) | [All status types](#)

Arm 1: Clients | Arm 2: Staff | Arm 3: Volunteers | Arm 4: Building

4. Find the Record for the client, and then click on the Record Number to the left of the client's name.

Displaying: [Instrument status only](#) | [Lock status only](#) | [All status types](#)

Arm 1: Clients | Arm 2: Staff | Arm 3: Volunteers | Arm 4: Building

Record ID	Application Form	Consent Form: Services	Consent Form: Collection and Use of Data	Needs Assessment: Client Contact Info	Needs Assessment: Emergency Contacts
1 Sally Rooney				+	+
3 May Dulay				+	
6 Annie Douglas				+	+
7 boby butter				+	+
8 Barbara Oliveira Mendoza				+	+
9 Brooklyn Nicole Boisjoli					
10 Chastity Rose Arbuckle				+	+
11 Courtney Lynn Sabu					+

- When you select an existing client, a full list of forms will be shown. The circle to the right of the form name shows the status of that form for that client. There is a [legend](#) at the top of the forms list to identify the status of each.

Record ID 6 Annie Douglas
Arm 1: Clients

Data Collection Instrument	Data_Entry_Clients
Application Form (survey)	
Consent Form: Services (survey)	
Consent Form: Collection and Use of Data	
Needs Assessment: Client Contact Info	+
Needs Assessment: Emergency Contacts	+
Needs Assessment: Background Information	
Needs Assessment: ACEs	
Needs Assessment: Housing	
Needs Assessment: Health and Wellness	
Needs Assessment: Child Health and Wellness	
Needs Assessment: Parenting and Pregnancy	
Needs Assessment: Relationships and Supports	
Needs Assessment: Employment/School/Income	
Needs Assessment: Legal Concerns	
Needs Assessment: Client Documentation	
Program: Resources	+
Program: Case Notes	+

Click on the circle to open the form for that client. If there is more than one form, it will show you several circles beside that form name. If you click on those circles, a list of the available forms will appear.

Program: Resources	+
Program: Case Notes	+
Program: Incident Report	
Program Safety Plan	
Program: Education Plan	
Program: Attendance Highbanks	
Outcomes: Flourishing Scale (survey)	1 08-08-2024
Outcomes: FCSS (survey)	2 11-08-2024
Outcomes: Program Feedback (survey)	
Exit: Blessed (survey)	

Program: Case Notes

Data_Entry_Clients (Arm 1: Clients)

(2)

1

08-08-2024

2

11-08-2024

+ Add new

You can add a new one by clicking on the + next to the circles.

Program: Resources	+
Program: Case Notes	+
Program: Incident Report	+
Program Safety Plan	+
Program: Education Plan	
Program: Attendance Highbanks	

Once you fill out the application form, you can then fill in the remaining forms one by one by clicking on the gray circle next to the form name. For each form, you would repeat the same process – fill the form, then save and exit or save and go to the next form. To make the process of accessing certain forms easier, we have set up different dashboards for users, as described earlier.

Data entry for survey-enabled forms

Some of the client forms, specifically the outcomes forms, have been enabled as surveys. This means that they can be filled in two ways – a) either directly through REDCap in the way described above or b) they can be emailed as surveys directly to clients. To email a survey to clients, please follow these instructions:

1. Go to Survey Distribution Tools on the left-hand pane (highlighted in the screenshot below)

REDCap
Logged in as fmustafa | Log out
My Projects
REDCap Messenger
Contact REDCap administrator

Project Home and Design
Project Home · Project Setup
Designer · Dictionary · Codebook
Project status: Development

Data Collection
Survey Distribution Tools
- Get a public survey link or build a participant list for inviting respondents
Record Status Dashboard
- View data collection status of all records
Add / Edit Records
- Create new records or edit/view existing ones

Applications
Project Dashboards
Alerts & Notifications
Multi-Language Management
Calendar
Data Exports, Reports, and Stats
Data Import Tool
Data Comparison Tool
Logging and Email Logging
File Repository
User Rights and DAGs
Data Quality and Resolve Issues

Calgary Foundation: Highbanks PID 70

Survey Distribution Tools
Public Survey Link Participant List Survey Invitation Log

Using a public survey link is the simplest and fastest way to collect responses for your survey. You may obtain the survey link below to email it to your participants. Responses will be collected anonymously (unless the survey contains questions asking for identifying data from the participant). **NOTE:** Since this method uses a single survey link for all participants, it allows for the possibility of participants taking the survey multiple times, which may be necessary in some cases.

To obtain the survey link, copy the URL below and paste it into the body of an email message in your own email client. Your email recipient(s) can then click the link to begin taking your survey.

The survey link below applies only to "Highbanks Society Application Form" - Data_Entry_Clients (Ar ▾)

Public Survey URL: <https://idea-redcap.research.athabascau.cloud/surveys/?s=YY...>

☐ Protect the public survey using the Google reCAPTCHA feature ?

Link Actions
Open public survey
Open public survey + Log out
Send me URL via email
Survey Access Code or QR Code

Link Customizations
Get Short Survey Link
Create Custom Survey Link
Get Embed Code

2. Go to participant list tab at the top (also highlighted in the screenshot)

- Click on the pull-down menu to see a list of all forms that are enabled as surveys. Select the one that you want to send as a survey, as below.

REDCap
 Logged in as fmustafa | Log out
 My Projects
 REDCap Messenger
 Contact REDCap administrator

Project Home and Design
 Project Home · Project Setup
 Designer · Dictionary · Codebook
 Project status: Development

Data Collection
 Survey Distribution Tools
 Record Status Dashboard
 Add / Edit Records

Applications
 Project Dashboards
 Alerts & Notifications
 Multi-Language Management
 Calendar
 Data Exports, Reports, and Stats
 Data Import Tool
 Data Comparison Tool
 Logging and Email Logging
 File Repository

Calgary Foundation: Highbanks PID 70

Survey Distribution Tools
 Public Survey Link · Participant List · Survey Invitation Log

The Participant List allows you to **send a customized email** to anyone in your list and **track who responds to your survey**. It is also possible to identify an individual's survey answers, if desired, by providing an Identifier for each participant (this feature must first be enabled by clicking the 'Enable' button in the table below). Note: All survey responses collected are considered anonymous unless you 1) are using Participant Identifiers or 2) have enabled the designated email field for invitations. [More details](#)

Survey Response Status: Not Anonymous ?

Participant List belonging to [Initial survey] "Highbanks So..." - Data_Entry_Clients (Arm 1: Clients) Remove all participants

Displaying 1 - 11 of 11 Export list

Email	Record	Participant Identifier (optional)	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
[No email listed]							
[No email listed]							
[No email listed]							
[No email listed]							
adouglas@gmail.com	6						
bobbybutter@gmail.com	7						
fmustafa@policywise.com	19						
hello@hotmail.com	3						

- Click on Compose Survey Invitations as below.

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 My Projects
 REDCap Messenger
 Contact REDCap administrator

Project Home and Design
 Project Home · Project Setup
 Designer · Dictionary · Codebook
 Project status: Development

Data Collection
 Survey Distribution Tools
 Record Status Dashboard
 Add / Edit Records

Applications
 Project Dashboards
 Alerts & Notifications

Calgary Foundation: Highbanks PID 70

Survey Distribution Tools
 Public Survey Link · Participant List · Survey Invitation Log

The Participant List allows you to **send a customized email** to anyone in your list and **track who responds to your survey**. It is also possible to identify an individual's survey answers, if desired, by providing an Identifier for each participant (this feature must first be enabled by clicking the 'Enable' button in the table below). Note: All survey responses collected are considered anonymous unless you 1) are using Participant Identifiers or 2) have enabled the designated email field for invitations. [More details](#)

Survey Response Status: Not Anonymous ?

Participant List belonging to [Initial survey] "Highbanks So..." - Data_Entry_Clients (Arm 1: Clients) Remove all participants

Displaying 1 - 11 of 11 Add participants **Compose Survey Invitations** Export list

Email	Record	Participant Identifier (optional)	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
[No email listed]		Disable					
[No email listed]							
[No email listed]							

- Select relevant participants for the survey from the participant list on the right-hand side, as below.
- Select when the survey email should be sent, add the email from which the survey should be sent, add a subject to the email and update the content of the email as needed. You can also enable reminders to be sent if surveys are not completed by a specific time. Click Send invitations when you are done.

- Survey participants will receive an email with a link to the survey. Once they fill out the survey, the data will automatically appear in REDCap in that client's record.

Send a Survey Invitation to Participants

Info
Survey title: Outcomes: FCSS
Event: Data_Entry_Clients (Arm 1: Clients)

When should the emails be sent?
☒ Immediately
☐ At specified time: D/M/Y H:M
The time must be for the time zone UTC, in which the current time is 15/08/2024 21:07.

Enable reminders
☐ Re-send invitation as a reminder if participant has not responded by a specified time?

Compose message
From: (select any project user to be the 'Sender')
To: [All participants selected from Participant List]
Subject:
 Send test email

Paragraph

Participant List (those who have not responded completely) **Actions:** -- check/uncheck participants --

Email	Participant Identifier	Scheduled?	Sent?	Responded?
☒ adouglas@gmail.com (ID 6)		-	☒	☐
☒ bobybutter@gmail.com (ID 7)		-	☒	☐
☒ hello@hotmail.com (ID 3)		-	☒	☐
☒ lulu369@hotmail.com (ID 4)		-	☒	☐
☒ sandrews@gmail.com (ID 5)		-	☒	☐
☒ test@test.com (ID 1)		-	☒	☐

Send Invitations **Cancel**

Arm 2: Staff

Add a Staff Incident Report

In the Staff Arm, you can add Incident Report Forms for incidents relating to staff members. In the left menu bar, under Data Collection, click on Record Status Dashboard, and then select the tab called Arm 2: Staff. To add a new Staff Incident Report, click the + beside the existing record. **Do not click the green button to add a new record.**

REDCap
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My Projects
 REDCap Messenger
 Contact REDCap administrator

Project Home and Design
 Data Collection
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Record Status Dashboard
 Add / Edit Records

Applications
 External Modules
 Help & Information

Calgary Foundation: Highbanks PID 70

Record Status Dashboard (all records)

Displayed below is a table listing all existing records/responses and their status for every data collection instrument (and if longitudinal, for every event). You may click any of the colored buttons in the table to open a new tab/window in your browser to view that record on that particular data collection instrument. Please note that if your form-level user privileges are restricted for certain data collection instruments, you will only be able to view those instruments, and if you belong to a Data Access Group, you will only be able to view records that belong to your group.

Dashboard displayed: [Default dashboard]
 Displaying record Page 1 of 1: "2" through "2" of 1 records
 ALL (1) records per page
 Create custom dashboard

Legend for status icons:

- Incomplete
- Unverified
- Complete
- Many statuses (mixed)
- Incomplete (no data saved) ?
- Partial Survey Response
- Completed Survey Response
- Many statuses (all same)

Arm 1: Clients **Arm 2: Staff** Arm 3: Volunteers Arm 4: Building

Record ID	Data_Entry_Staff Staff Incident Report
2	

View an Existing Staff Incident Report

To view all Staff Incident Reports, open the Record Status Dashboard in the left menu bar and click on Record Status Dashboard. Then select the second tab that says Arm 2: Staff. Click on the Record ID (there will only be one).

Arm 1: Clients		Arm 2: Staff		Arm 3: Volunteers		Arm 4: Building	
Record ID		Data_Entry_Staff					
2		Staff: Incident Report					

This will show you a list of all existing Staff Incident Reports, shown by the date that the incident occurred. Click on the circle button to the left of the date to open a report.

Data Collection Instrument		Data_Entry_Staff	
Staff: Incident Report			
Delete all data on event:			

Repeating Instruments

Staff: Incident Report			
Data_Entry_Staff (Arm 2: Staff)			
(2)			
1		15-05-2024 15:12	
2		24-07-2024 13:28	
			+ Add new

Once an existing report is opened, you can review the details and make changes or add new information as needed. Use the Save menu in the top right or at the bottom of the form to save your changes.

Calgary Foundation: Highbanks

PID 70

Actions:

Modify instrument

Download PDF of Instrument(s)

Video: Basic data entry

Save & Exit Form

Save & Go To Next Record

- Cancel -

Staff: Incident Report

Current instance: 2 – 24-07-2024 13:28

Editing existing Record ID 2. (Instance #2)

Event: Data_Entry_Staff (Arm 2: Staff)

Record ID2

Staff Incident Report

Incident Details

Complete this form when there is an incident involving a staff member. Enter information about the incident below.

Date & Time:

24-07-2024 13:28

Now

D-M-Y H:M

Room number or location, if applicable:	470
Incident reported by:	Test report
Other staff notified:	Test Report

Other person(s) involved or witnesses:

Arm 3: Volunteers

Add a Volunteer Incident Report

In the Volunteer Arm, you can add Incident Report Forms for incidents relating to volunteers. In the left menu bar, under Data Collection, click on Record Status Dashboard, and then select the tab called Arm 3: Volunteers. To add a new Volunteer Incident Report, click the + beside the existing record. **Do not** click the green button to add a new record.

The screenshot shows the REDCap interface for the 'Calgary Foundation: Highbanks' project (PID: 70). The left sidebar contains navigation options like 'My Projects', 'REDCap Messenger', and 'Record Status Dashboard'. The main area displays the 'Record Status Dashboard (all records)' for 'Arm 3: Volunteers'. It includes a table of records with columns for Record ID, Volunteer Demographic Data, and Volunteer Incident Report. A legend for status icons is provided, and a green button '+ Add new record for this arm' is visible.

REDCap
Logged in as fmustafa | Log out
My Projects
REDCap Messenger
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Project Home and Design
Project Home · Project Setup
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Project status: Development
Data Collection
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Add / Edit Records
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External Modules
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Calgary Foundation: Highbanks PID: 70

Record Status Dashboard (all records)

Displayed below is a table listing all existing records/responses and their status for every data collection instrument (and if longitudinal, for every event). You may click any of the colored buttons in the table to open a new tab/window in your browser to view that record on that particular data collection instrument. Please note that if your form-level user privileges are restricted for certain data collection instruments, you will only be able to view those instruments, and if you belong to a Data Access Group, you will only be able to view records that belong to your group.

Legend for status icons:

- Incomplete
- Unverified
- Complete
- Many statuses (mixed)
- Incomplete (no data saved) ?
- Partial Survey Response
- Completed Survey Response
- Many statuses (all same)

Dashboard displayed: [Default dashboard] Create custom dashboard
Displaying record: Page 1 of 1: "12" through "12" of 1 records
ALL (1) records per page

+ Add new record for this arm

Displaying: Instrument status only | Lock status only | All status types

Arm 1: Clients Arm 2: Staff **Arm 3: Volunteers** Arm 4: Building

Record ID	Volunteer Demographic Data	Volunteer Incident Report
12		

View an Existing Volunteer Incident Report

To view all Volunteer Incident Reports, open the Record Status Dashboard in the left menu bar and click on Record Status Dashboard. Then select the second tab that says Arm 3: Volunteers. Click on the Record ID (there will only be one).

This close-up shows the 'Arm 3: Volunteers' tab selected. The table has a single row with Record ID 12. The 'Volunteer Incident Report' column contains a red circle icon with a white plus sign, indicating a new report can be added.

Arm 1: Clients Arm 2: Staff **Arm 3: Volunteers** Arm 4: Building

Record ID	Volunteer Demographic Data	Volunteer Incident Report
12		

This will show you a list of all existing Volunteer Incident Reports, shown by the date that the incident occurred. Click on the circle button to the left of the date to open a report.

Record Home Page

The grid below displays the form-by-form progress of data entered for the currently selected record. You may click on the colored status icons to access that form/event. If you wish, you may modify the events below by navigating to the [Define My Events](#) page.

[Choose action for record](#)

Legend for status icons:

- Incomplete
- Unverified
- Complete
- Many statuses (mixed)
- Incomplete (no data saved) ?
- Partial Survey Response
- Completed Survey Response
- ● ● Many statuses (all same)

Record ID 12

Arm 3: Volunteers

Data Collection Instrument	Data_Entry_Volunteers
Volunteer Demographic Data	●
Volunteer: Incident Report	● +
Delete all data on event:	×

Repeating Instruments

Volunteer: Incident Report
▼

Data_Entry_Volunteers (Arm 3: Volunteers)

(1)

1	●	24-07-2024 13:32
---	------------------------------------	------------------

[+ Add new](#)

Once an existing report is opened, you can review the details and make changes or add new information as needed. Use the Save menu in the top right or at the bottom of the form to save your changes.

Calgary Foundation: Highbanks
PID 70

[Save & Exit Form](#)
[Save & Go To Next Record](#)
[- Cancel -](#)

Actions: [Modify Instrument](#) [Download PDF of Instrument\(s\)](#) [Video: Basic data entry](#)

Volunteer: Incident Report

Current instance: ● 1 - 24-07-2024 13:32

Editing existing Record ID 12. (Instance #1)

Event: Data_Entry_Volunteers (Arm 3: Volunteers)

Record ID 12

Volunteer Incident Report

Incident Report

Complete this form when there is an incident involving a volunteer. Enter information about the incident below.

Date & Time: 24-07-2024 13:32 [Now](#)

Room number or location, if applicable:	880
Incident reported by:	Test report
On-call staff notified:	Test report

Arm 4: Building

In this arm, you can enter a Building Incident Report (for events such as damage to the building, utilities-related concerns, or complaints from neighbours) or a Building Note (any update at the end of a shift that the next staff taking over should know, such as that a repair person is expected later in the evening.)

Add a Building Incident Report or Building Note

In the Building Arm, you can add Incident Report Forms for incidents relating to building facilities. In the left menu bar, under Data Collection, click on Record Status Dashboard, and then select the tab called Arm 4: Building. Click the + beside the existing record to add either a Building Incident Report or a Building Note. **Do not click the green button to add a new record.**

REDCap
Logged in as fmustafa | Log out
My Projects
REDCap Messenger
Contact REDCap administrator
Project Home and Design
Project Home · Project Setup
Designer · Dictionary · Codebook
Project status: Development
Data Collection
Survey Distribution Tools
Record Status Dashboard
Add / Edit Records
Applications
External Modules
Help & Information

Calgary Foundation: Highbanks PID 70

Record Status Dashboard (all records)

Displayed below is a table listing all existing records/responses and their status for every data collection instrument (and if longitudinal, for every event). You may click any of the colored buttons in the table to open a new tab/window in your browser to view that record on that particular data collection instrument. Please note that if your form-level user privileges are restricted for certain data collection instruments, you will only be able to view those instruments, and if you belong to a Data Access Group, you will only be able to view records that belong to your group.

Legend for status icons:

- Incomplete
- Unverified
- Complete
- Many statuses (mixed)
- Incomplete (no data saved) ?
- Partial Survey Response
- Completed Survey Response
- Many statuses (all same)

Dashboard displayed: [Default dashboard] Create custom dashboard
Displaying record Page 1 of 1: "12" through "12" of 1 records ALL (1) records per page

+ Add new record for this arm

Displaying: Instrument status only | Lock status only | All status types

Arm 1: Clients Arm 2: Staff **Arm 3: Volunteers** Arm 4: Building

Record ID	Data Entry: Volunteers
	Volunteer Demographic Data Volunteer: Incident Report
12	

View an Existing Building Incident Report

To view all Building Incident Reports, open the Record Status Dashboard in the left menu bar and click on Record Status Dashboard. Then select the tab that says Arm 4: Building. Click on the Record ID (there will only be one).

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Record Status Dashboard (all records)

Displayed below is a table listing all existing records/responses and their status for every data collection instrument (and if longitudinal, for every event). You may click any of the colored buttons in the table to open a new tab/window in your browser to view that record on that particular data collection instrument. Please note that if your form-level user privileges are restricted for certain data collection instruments, you will only be able to view those instruments, and if you belong to a Data Access Group, you will only be able to view records that belong to your group.

Legend for status icons:

- Incomplete
- Unverified
- Complete
- Many statuses (mixed)
- Incomplete (no data saved) ?
- Partial Survey Response
- Completed Survey Response
- Many statuses (all same)

Dashboard displayed: [Default dashboard] [Create custom dashboard](#)

Displaying record Page 1 of 1: "13" through "13" of 1 records ALL (1) records per page

[+ Add new record for this arm](#)

Displaying: Instrument status only | [Lock status only](#) | [All status types](#)

Arm 1: Clients Arm 2: Staff Arm 3: Volunteers **Arm 4: Building**

Record ID	Data_Entry_Building	
	Building: Incident Report	Buildings: Staff Notes
13		

This will show you a list of all existing Building Incident Reports, shown by the date that the incident occurred. Click on the circle button to the left of the date to open a report.

Calgary Foundation: Highbanks

PID 70

Record Home Page

The grid below displays the form-by-form progress of data entered for the currently selected record. You may click on the colored status icons to access that form/event. If you wish, you may modify the events below by navigating to the [Define My Events](#) page.

[Choose action for record](#)

Legend for status icons:

- Incomplete
- Unverified
- Complete
- Many statuses (mixed)
- Incomplete (no data saved) ?
- Partial Survey Response
- Completed Survey Response
- Many statuses (all same)

Record ID 13 successfully edited.

Record ID 13

Arm 4: Building

Data Collection Instrument	Data_Entry_Building
Building: Incident Report	 +
Building: Staff Notes	 +
Delete all data on event:	

Repeating Instruments

Building: Incident Report			
Data_Entry_Building (Arm 4: Building)			
(2)			
1		30-07-2024 11:07	
2		16-12-2022 11:09	
			+ Add new

Building: Staff Notes			
Data_Entry_Building (Arm 4: Building)			
(1)			
1		14-07-2024	
			+ Add new

Once an existing report is opened, you can review the details and make changes or add new information as needed. Use the Save menu in the top right or at the bottom of the form to save your changes.

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Actions: [Modify instrument](#) [Download PDF of instrument\(s\)](#) [Video: Basic data entry](#)

Building: Incident Report

Current instance: 2 - 16-12-2022 11:09

Editing existing Record ID 13, (Instance #2)

Event: **Data_Entry_Building (Arm 4: Building)**

Record ID 13

Building Incident Report

Incident Details

Complete this form when there is a building or maintenance incident (such as damage to the building, utilities-related concerns, or complaints from neighbours).

Date & Time: 16-12-2022 11:09 Now D-M-Y H:M

Room number or location, if applicable:	789-B
Incident reported by:	Test 2
On-call staff notified:	Test 2

Data Processes: Intake to Alumni

This table references the Highbanks Society Client Journey and highlights where each of these steps is documented within REDCap.

INTAKE	Where to Document in REDCap
Inquiry form is filled out online or on the phone, and the responses are emailed to Highbanks Staff	No data entry for this in REDCap.
Once an inquiry form is submitted, an in-person meeting is scheduled with the client where the application form is filled out	Application Form (complete with client over the phone/in person, or send email link/QR code/Survey Access Code)
References for potential resident are called	Reference contact information is provided near the end of the Application Form. Staff conducting the reference checks should document notes on the Application Form in Staff Use Only Section 1: Reference Check Responses (note that this section will be empty if no references were provided on the form)

Interview potential client on Zoom Confirmation is obtained that the potential resident meets Highbanks Society requirements: The client is between the ages of 16-24 is pregnant or parenting or is a mom who does not have custody of their children is in agreement with the program schedule and guidelines	Review the Application Form and ensure all fields are complete and up to date. Document the date of the scheduled interview on the Application Form in Staff Use Only Section 2: Application Decision Document notes from the Zoom meeting on the Application Form using the 'For Agency' fields throughout the form. Complete Staff Use Only Section 2: Application Decision Mark the Application Form Complete
Move-in Date Potential resident is put on a waitlist if no room is available	Select application decision as "waitlisted" on the application form in REDCap if needed. If you select this, the client's data will automatically move to the waitlisted clients dashboard. When the move-in date is set: Complete the Program Progress Tracker to document move-in date and other details. Also, fill out the Needs Assessment: Client Contact Information form to update any contact info. Complete the Consent Form: Services and Consent Form: Collection and Use of Data forms Complete the Needs Assessment: Emergency Contacts form Complete the Needs Assessment: Background Information form

MOVE-IN	
Highbanks staff assist clients with move-in, including discussing living arrangements and facilities.	No data entry for this in REDCap.
LIVING AT Highbanks Society	
Family Support Worker makes monthly home visits and meets with client 4 times a week. Client progress through 3 different program stages -- Finding shore, safe harbour and lighthouse (the alumni program) Incoming clients are either at finding shore or safe harbour The first service response is stabilization. Family support worker makes monthly home visits and 4 times a week meets with the client. Initially family support worker meets clients more often, and as they move from finding shore to safe harbour - clients become more independent, and meetings with the family support worker decline. A birth plan is created by a midwife for pregnant clients. Clients will also have an education plan and a safety plan (for those recovering from addiction) using the Program: Safety Plan form and Program: Education Plan form. Data is also collected on the children of clients (e.g. what pediatrician they're seeing) on the Needs Assessment: Child Health and Wellness form. In assessing outcomes, take into account Adverse childhood experiences (ACEs) and Protective and Compensatory Experiences (PACEs) (completed on the Needs Assessment: ACEs form).	Complete the Program: Case Notes form to document each client meeting and monitor progress towards goals. Complete the Program: Safety Plan and Program: Education Plan forms Complete the Needs Assessment forms over the first several weekly meetings: - Health and Wellness - Child Health and Wellness - Parenting and Pregnancy - Relationships and Supports - Housing - Employment/School/Income - Legal Concerns - Client Documentation (ID) - ACEs Complete the Program Resources form as needed to direct clients to different resources and supports.
Attendance in Program Complete the Program: Attendance Highbanks form to document monthly attendance at events.	Use the Program: Attendance Highbanks form to document attendance on a monthly basis.
Incidents occurring at Highbanks Society are recorded on a form.	Use the Program: Incident Report form to document any incidents occurring related to the client
Notification of Eviction or Potential Termination from Highbanks Society.	Use the Program: Incident form to document notification/warning of eviction or potential termination Use the Exit: Planned or Exit: Unplanned form to document a client leaving the program

Residents are asked to fill out a feedback survey.	Use the Outcomes: Program Feedback form on a regular basis to obtain program feedback from the client
MOVE-OUT	
Resident is required to clean their room as part of the move-out process and return any items borrowed during their stay.	No data entry for this in REDCap.
Resident is asked to complete a survey for their opinion on their time at Highbanks Society.	Complete the Exit: Planned form Have the Resident complete the Outcomes: Program Feedback form
ALUMNI	
Residents “graduate” out of Programing. This term is used to indicate that the Resident was ready to leave and did so on good terms rather than being removed/evicted.	No data entry for this in REDCap
Family Support Worker is available to and will keep in contact with a “graduated” Resident for 3 to 6 months after the Resident leaves Highbanks Society. During this time, Key Worker will assist the Resident by: Referring Resident to the Food Bank Answering any questions that the Resident may have Informing Resident if they have received mail at Highbanks Society for pick up.	No data entry for this in REDCap.
Highbanks has events which alumni can attend. Attendance is tracked.	Use the Alumni Form to record updates about the client’s current status and events that they attend.