REDCap USER GUIDE

Highbanks Society User Guide

Entering and Changing Data

PolicyWise for Children & Families

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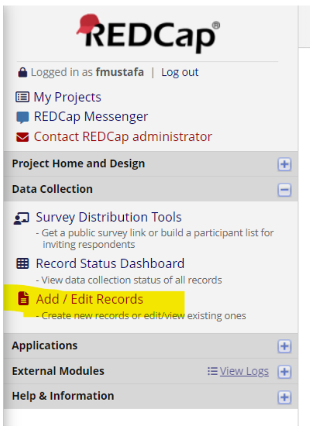
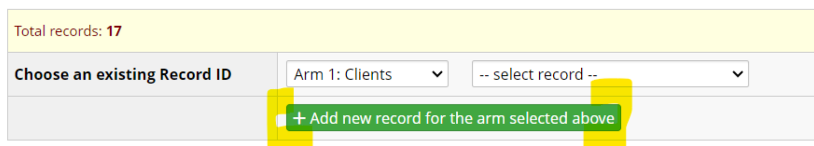
Arm 1: Clients

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

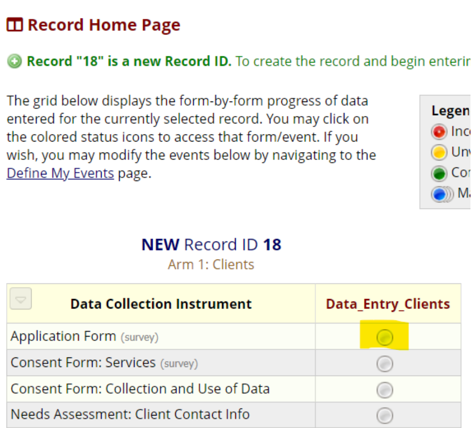
[Video overview here from RedCap about Data Entry]

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.



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

Welcome! We appreciate your interest in our services. know what you need so we can help you. **Keeping your information safe**	rk blue text- Information
Demographic Details	ge black text- Section headers
We ask for your demographic information to help diverse backgrounds of our applicants.	ey italic text- Instructions
Emma House works with other orga applicants on our waitlist receive th they need. We would like your cons application information with releva	ht 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

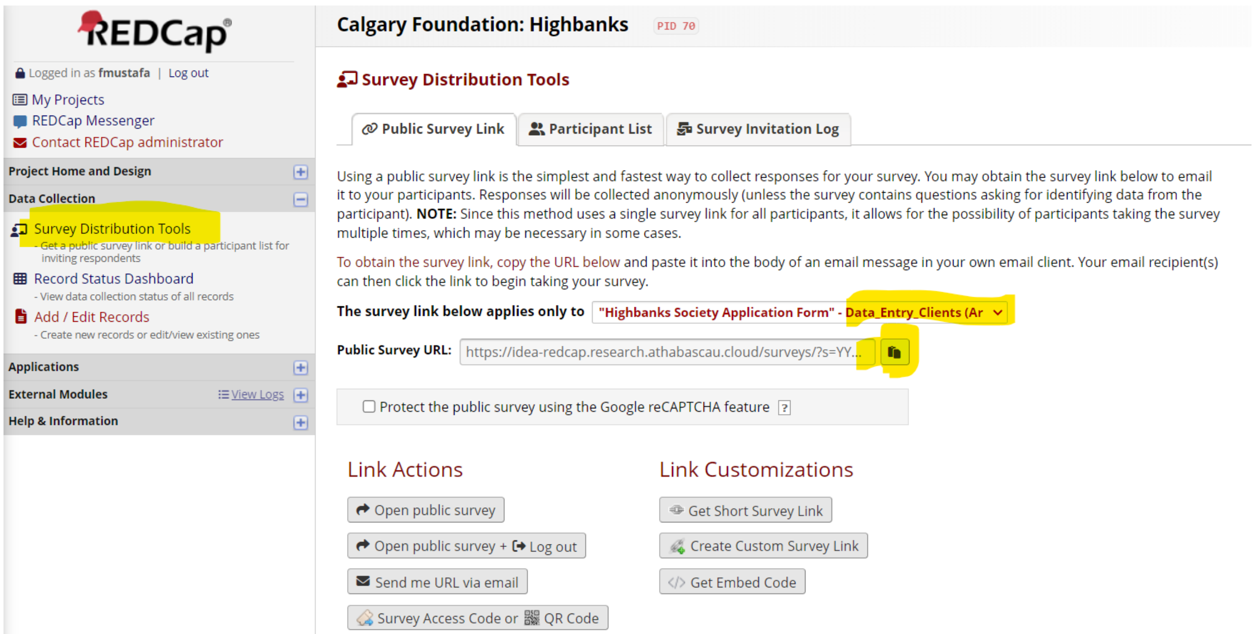
Adding a new client – Send a link for the client to complete the application form

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.

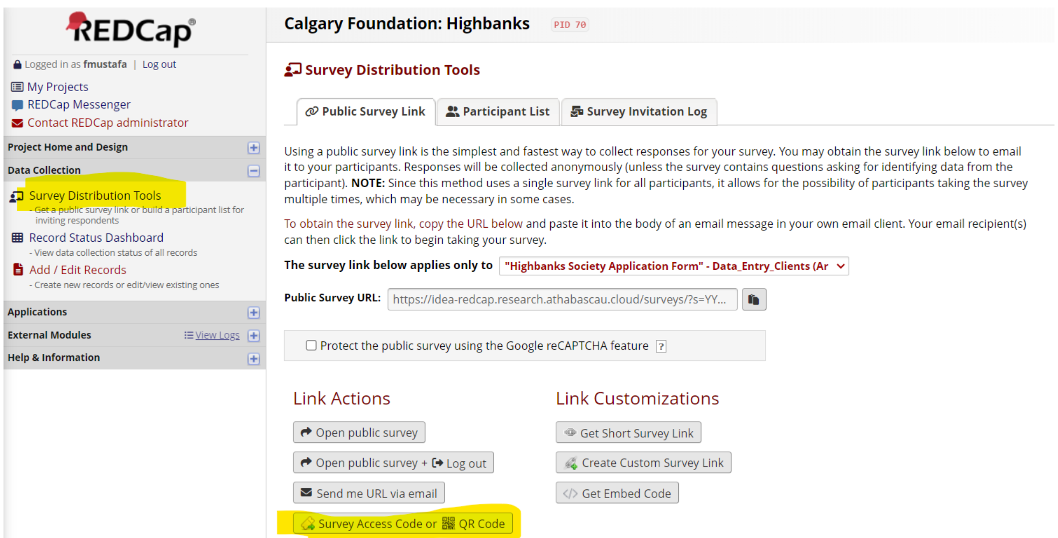


Adding a new client – Create a QR Code or Survey Access Code

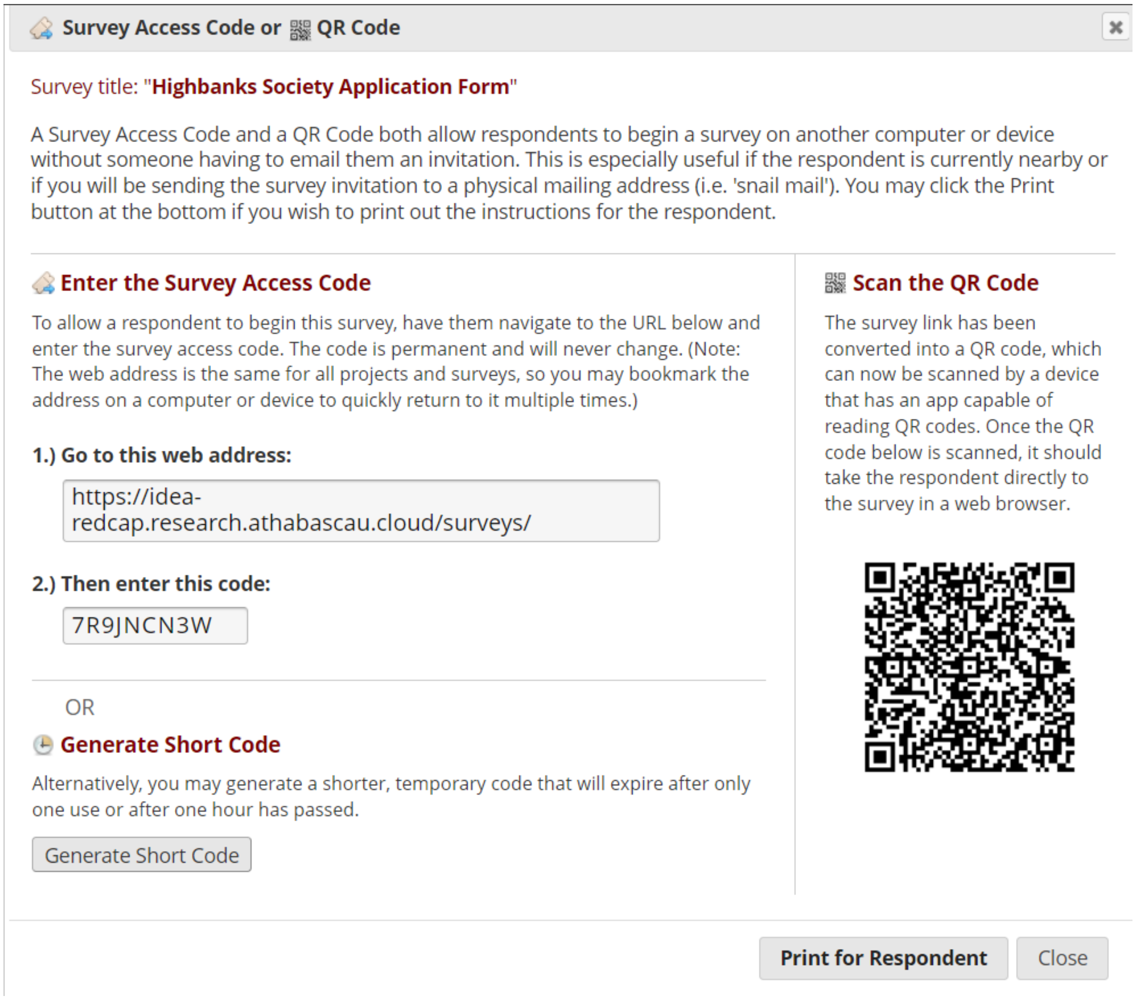
Note: If you send the survey as a QR Code or Survey Access Code to the client, the 'Staff Only' section of the survey will not show on their linked version. You will need to use the [Update an Existing Client]() instructions to complete the 'Staff Only' section of the form separately.

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



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

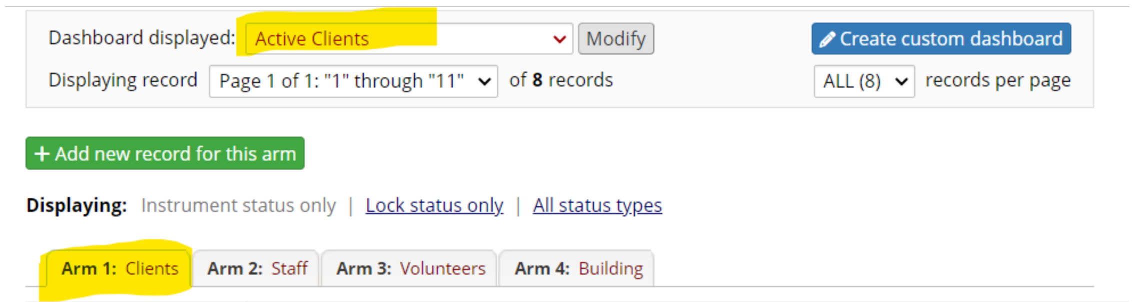
The survey link has been converted into a QR code, which can now be scanned by a device that has an app capable of reading QR codes. Once the QR code below is scanned, it should take the respondent directly to the survey in a web browser.

Print for Respondent Close

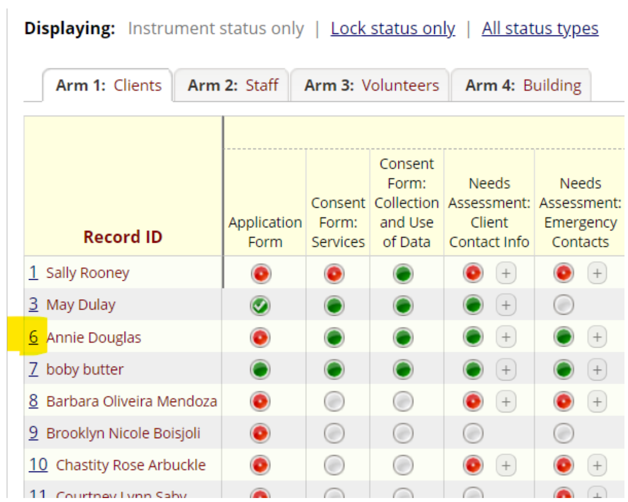
Updating an existing client

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.

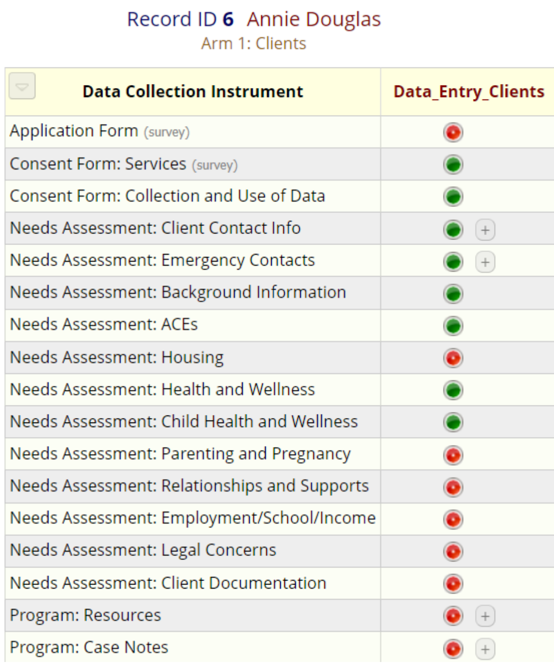
1. Open the [Record Status Dashboard]
2. Select Arm 1: Clients
3. Ensure the Active Clients Dashboard is displayed (or the correct dashboard for your needs) in the Dashboard Displayed box.



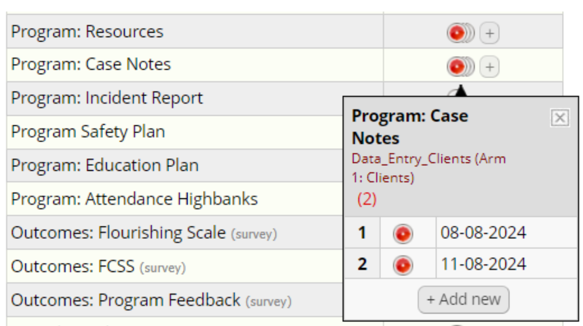
4. Find the Record for the client, and then click on the Record Number to the left of the client's name.



5. 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.



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.



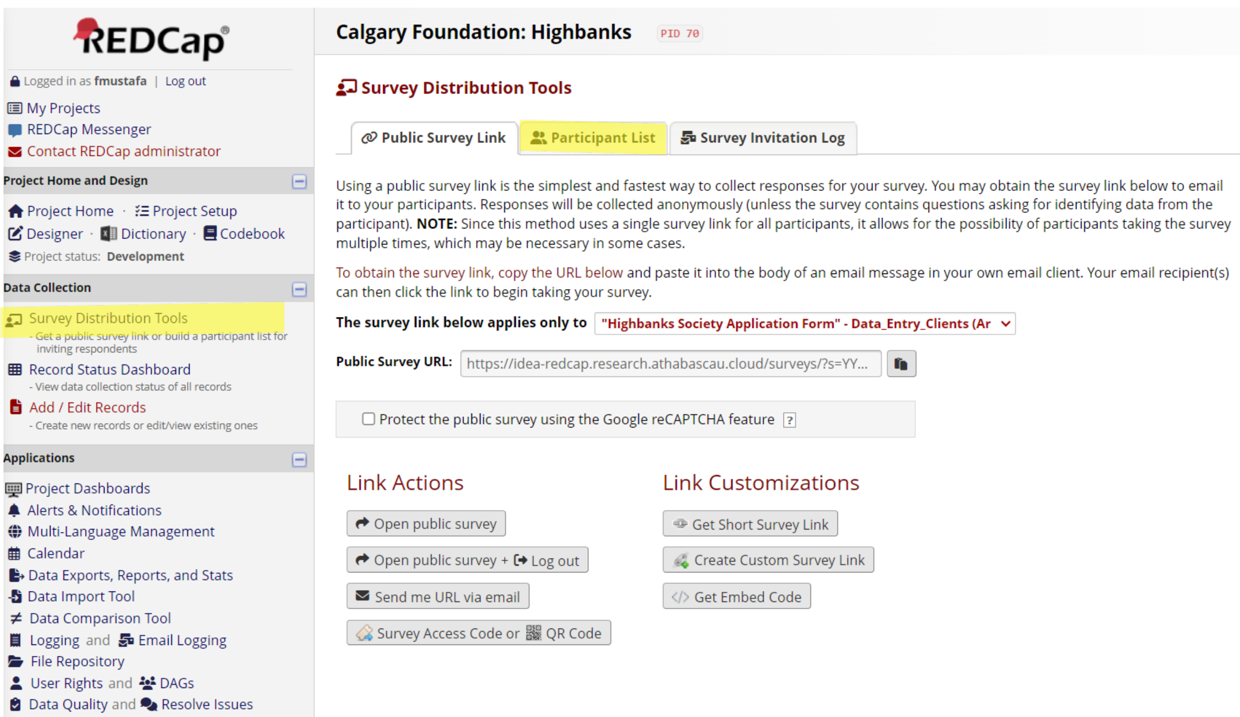
You can add a new one by clicking on the + next to the circles.

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

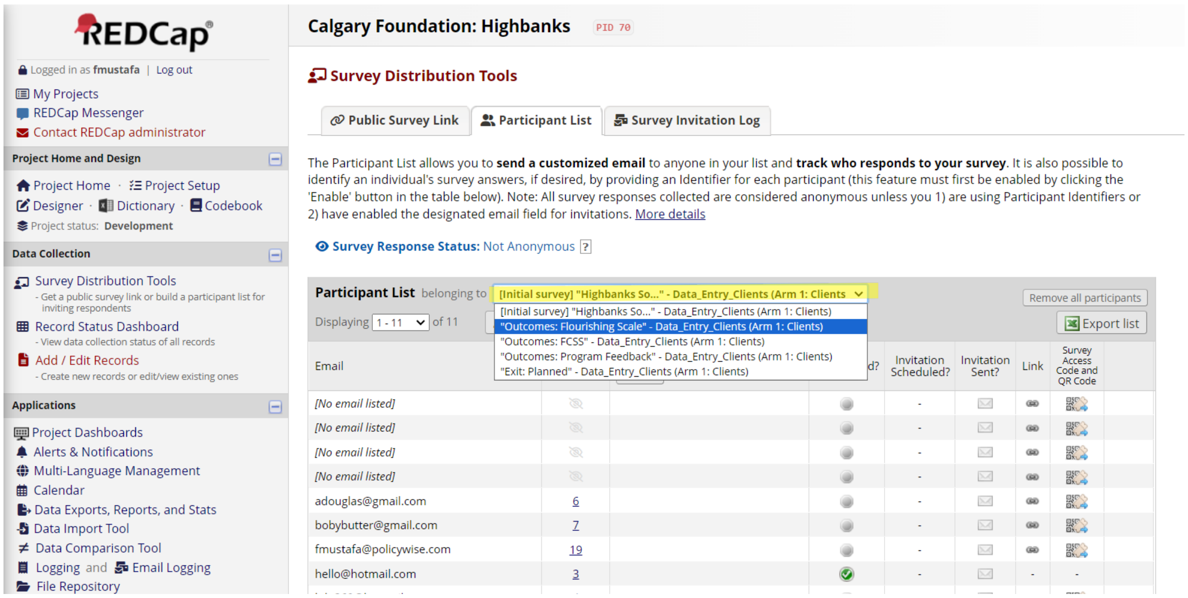
Some of the client forms, specifically the outcomes forms, have been enabled as surveys. This means that they can be filled in two ways – a) either directly through REDCap in the way described above or b) they can emailed as surveys directly to clients. To email a survey to clients, please follow these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

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

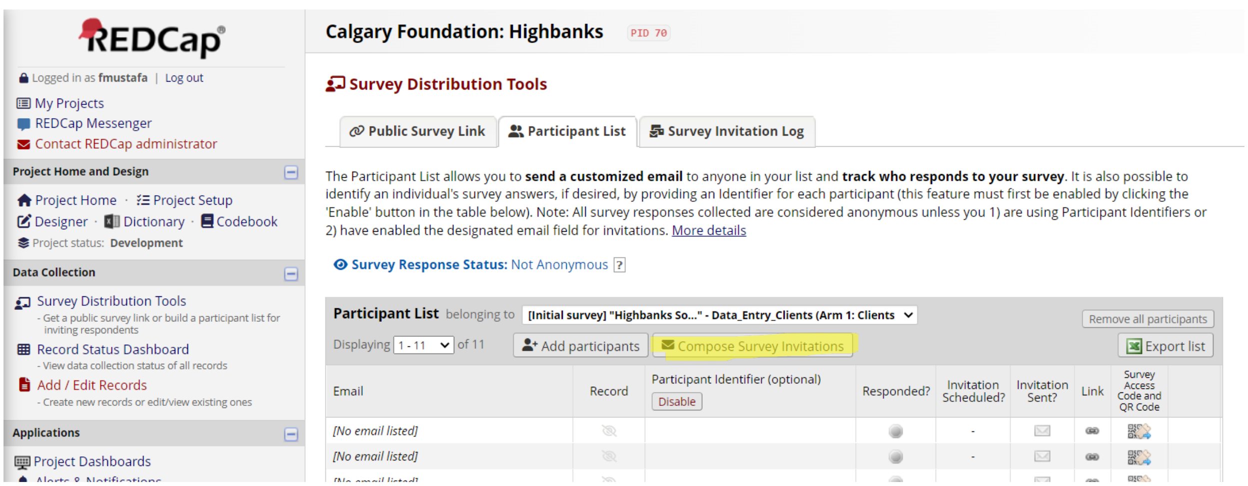


2. Go to participant list tab at the top (also highlighted in the screenshot)

3. 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.



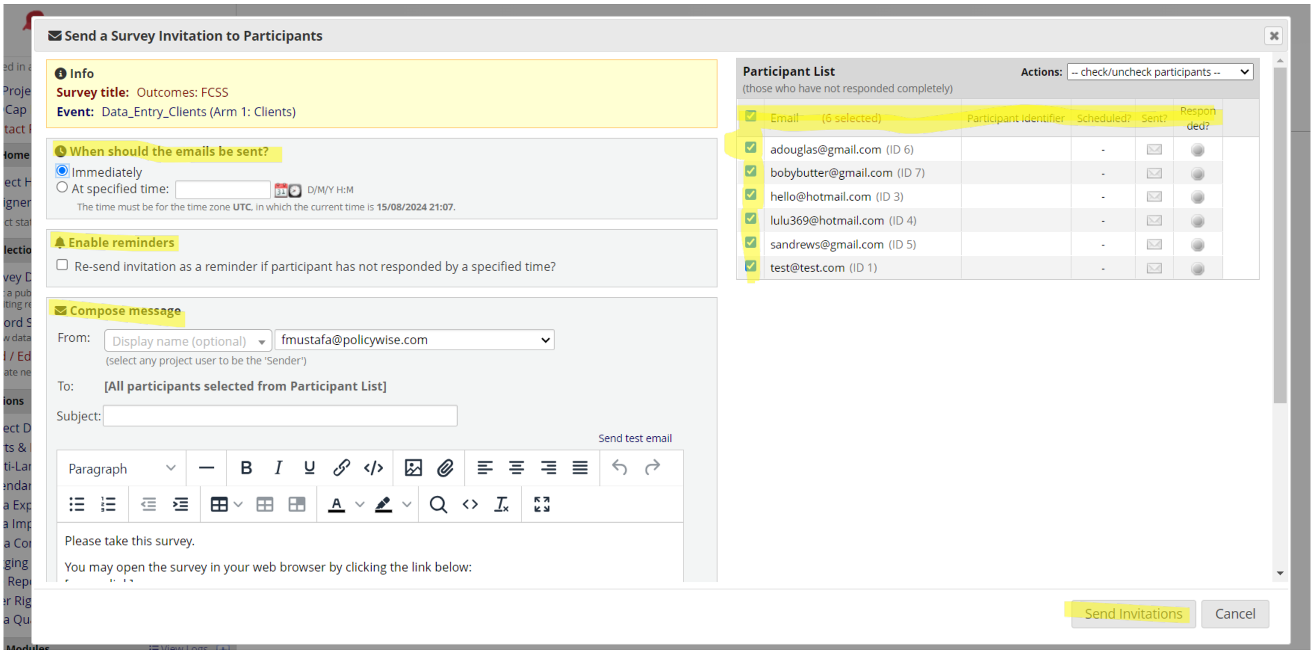
4. Click on Compose Survey Invitations as below.



5. Select relevant participants for the survey from the participant list on the right-hand side, as below.

6. 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.

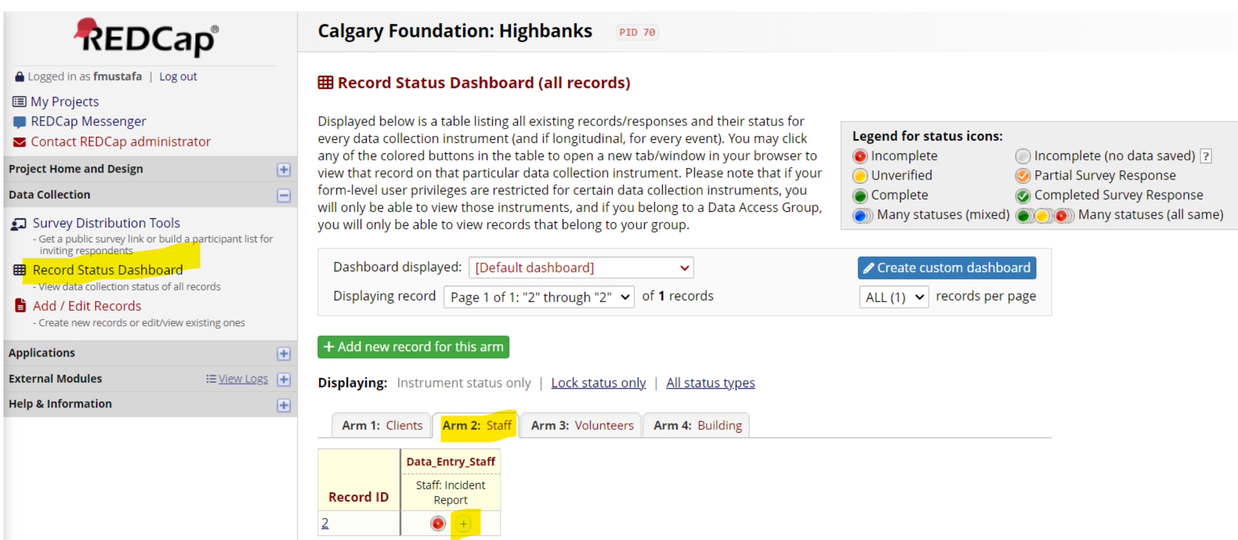
7. Survey participants will receive an email with a link to the survey. Once they fill out the survey, the data will automatically appear in REDCap in that client's record.



Arm 2: Staff

Add a Staff Incident Report

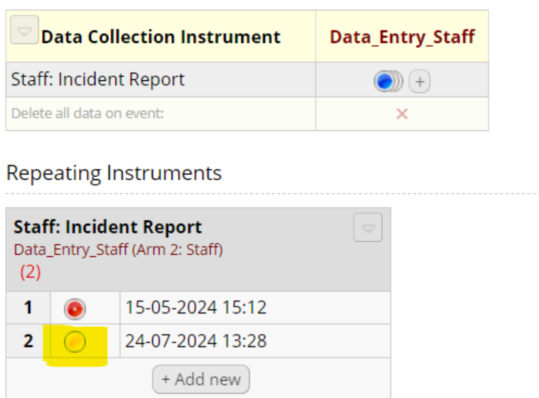
In the Staff Arm, you can add Incident Report Forms for incidents relating to staff members. In the left menu bar, under Data Collection, click on Record Status Dashboard, and then select the tab called Arm 2: Staff. To add a new Staff Incident Report, click the + beside the existing record. **Do not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



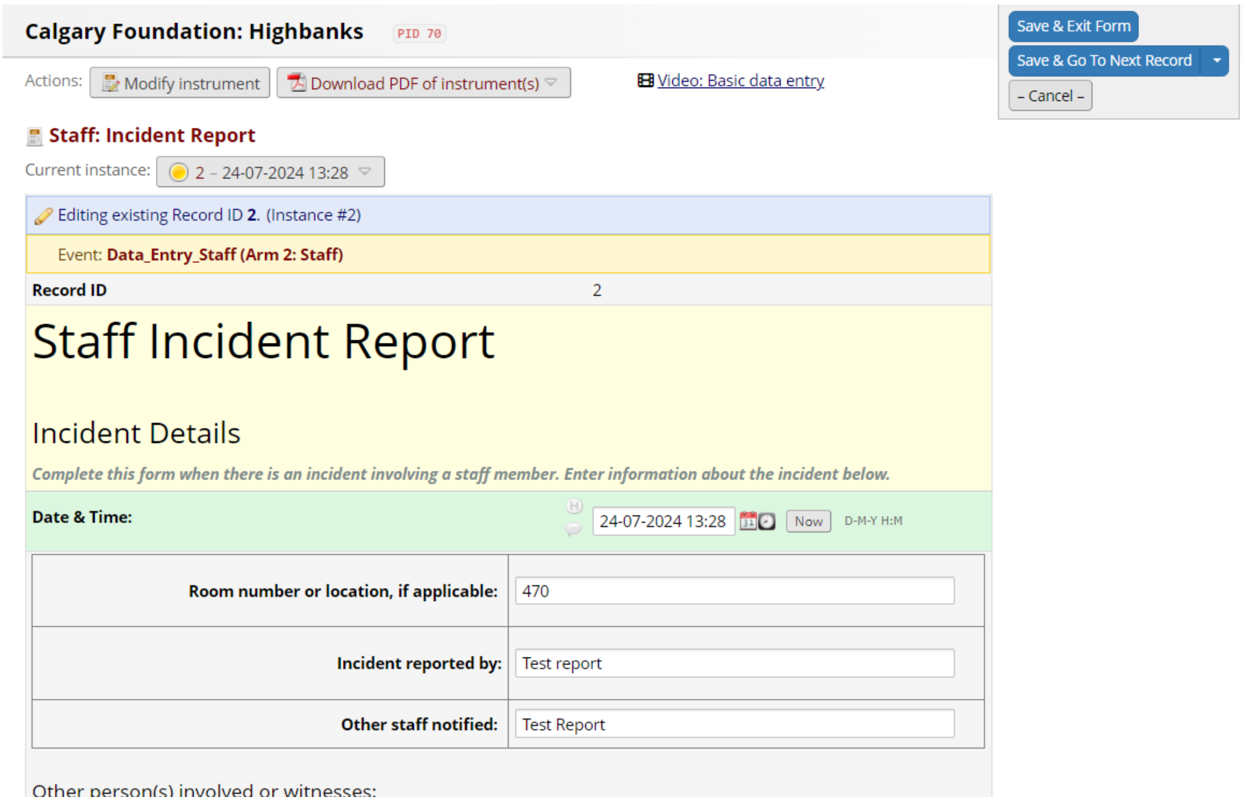
View an Existing Staff Incident Report

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).

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.



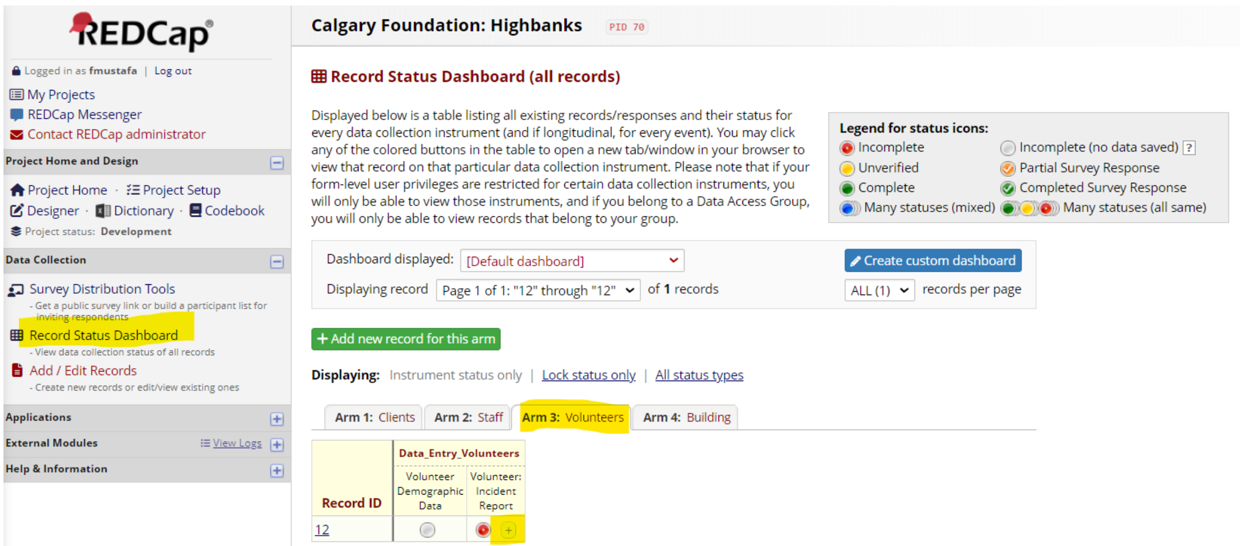
Once an existing report is opened, you can review the details and make changes or add new information as needed. Use the Save menu in the top right or at the bottom of the form to save your changes.



Arm 3: Volunteers

Add a Volunteer Incident Report

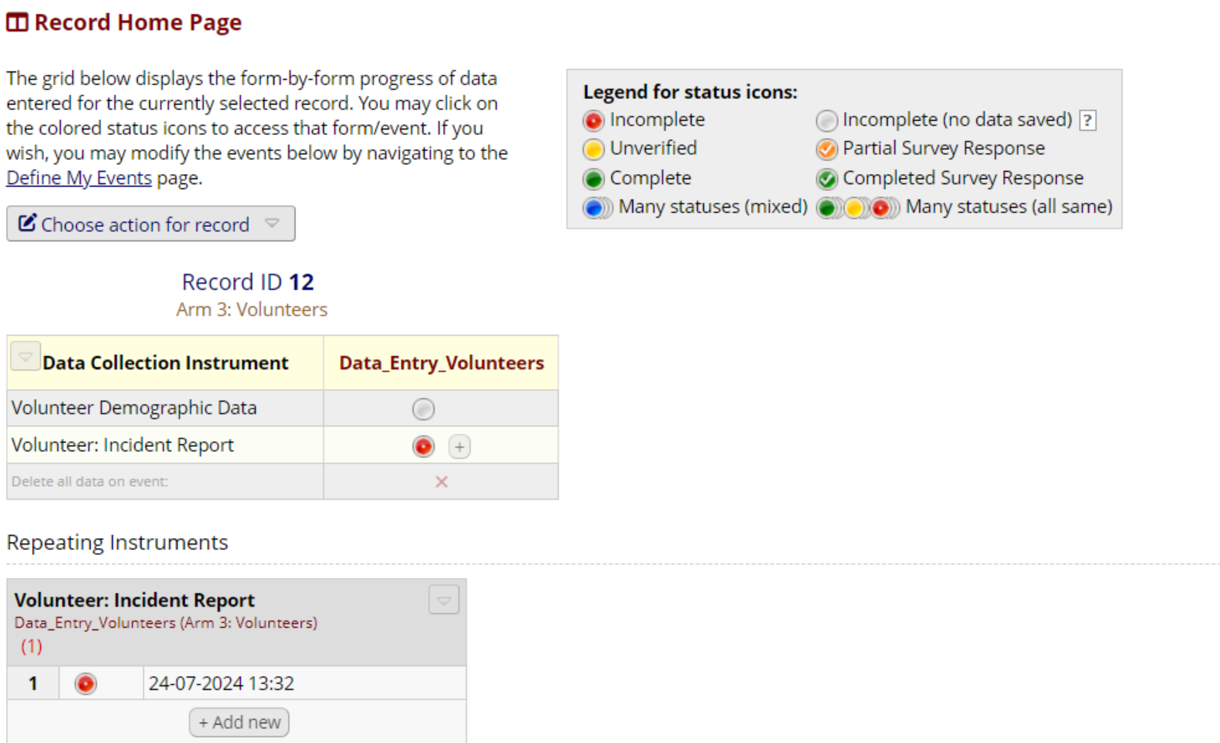
In the Volunteer Arm, you can add Incident Report Forms for incidents relating to volunteers. In the left menu bar, under Data Collection, click on Record Status Dashboard, and then select the tab called Arm 3: Volunteers. To add a new Volunteer Incident Report, click the + beside the existing record.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



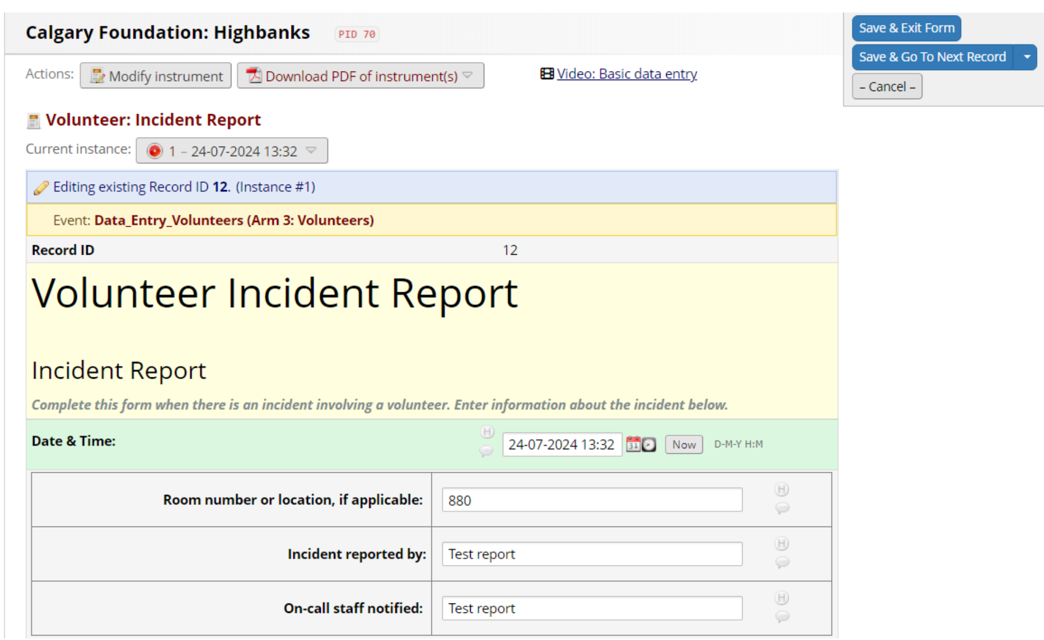
View an Existing Volunteer Incident Report

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 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.



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.

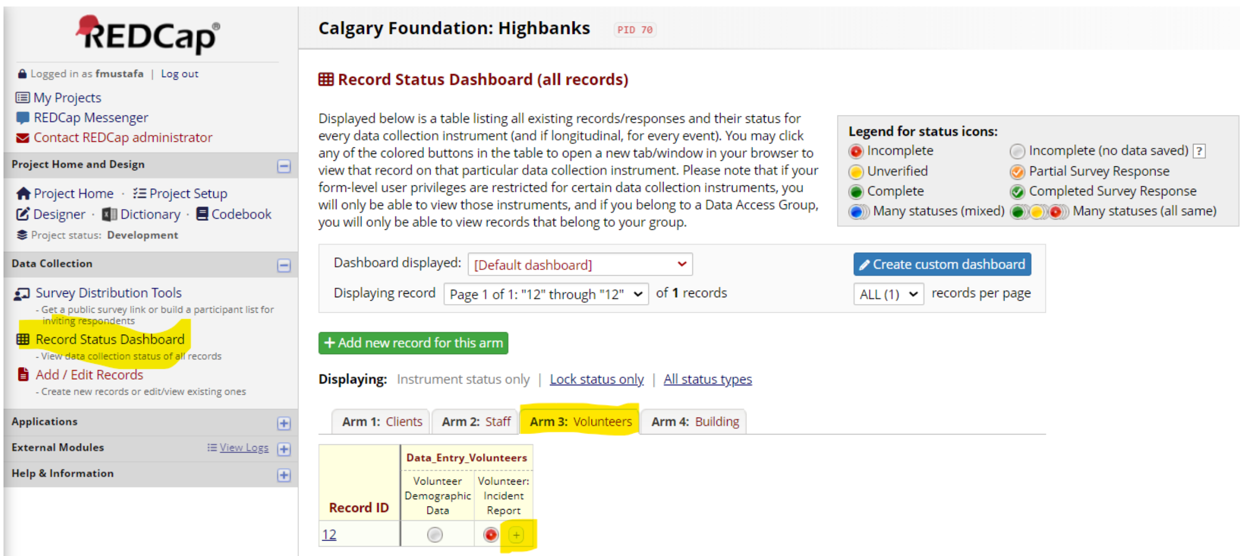


Arm 4: Building

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.)

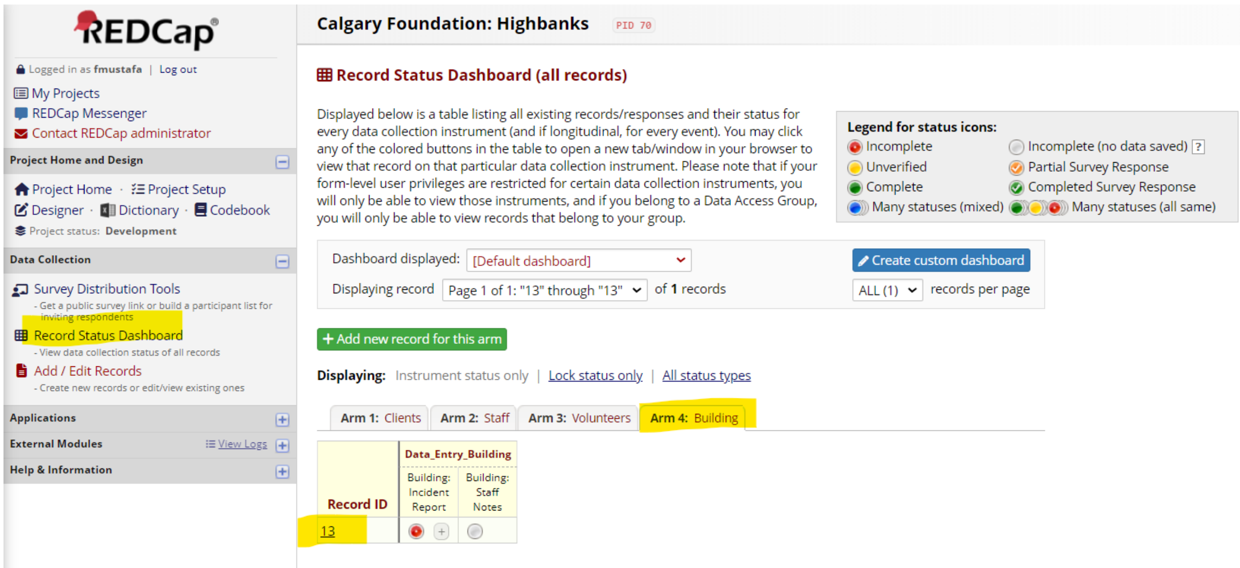
Add a Building Incident Report or Building Note

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.**

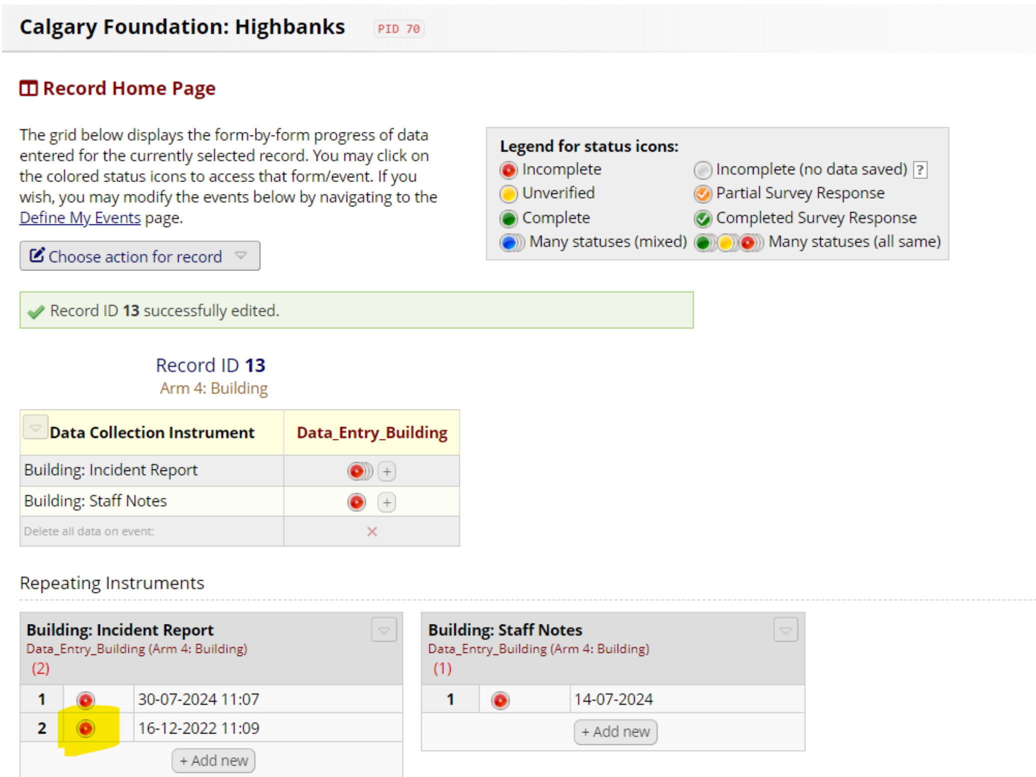


View an Existing Building Incident Report

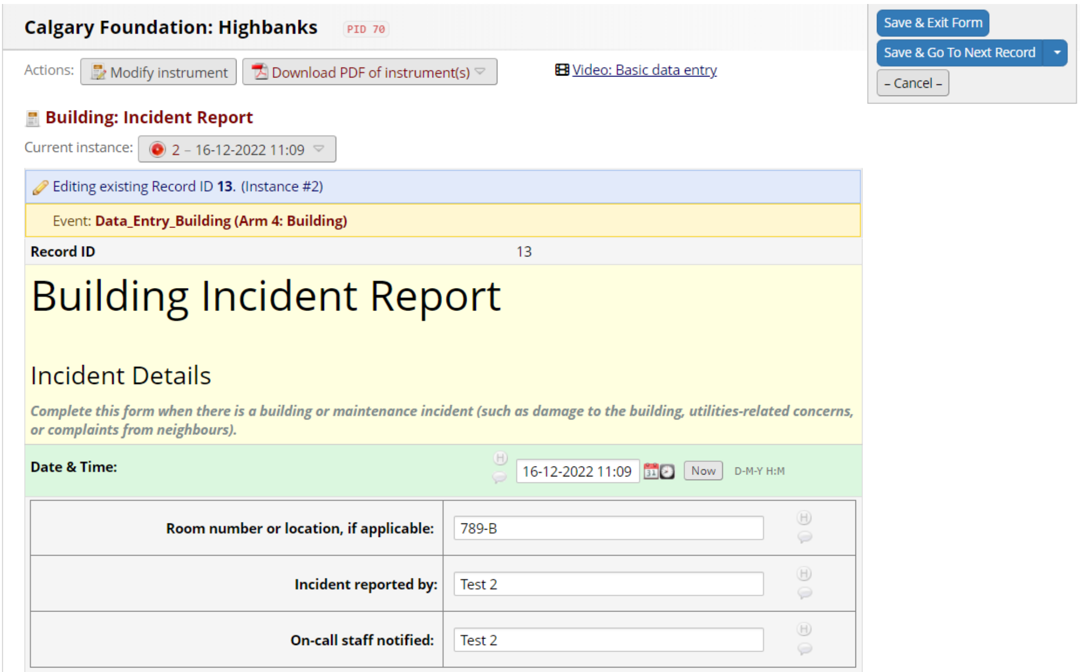
To view all Building Incident Reports, open the Record Status Dashboard in the left menu bar and click on Record Status Dashboard. Then select the tab that says Arm 4: Building. Click on the Record ID (there will only be one).



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.



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.



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.