REDCap USER GUIDE

Highbanks Society User Guide

REDCap Basics

PolicyWise for Children & Families

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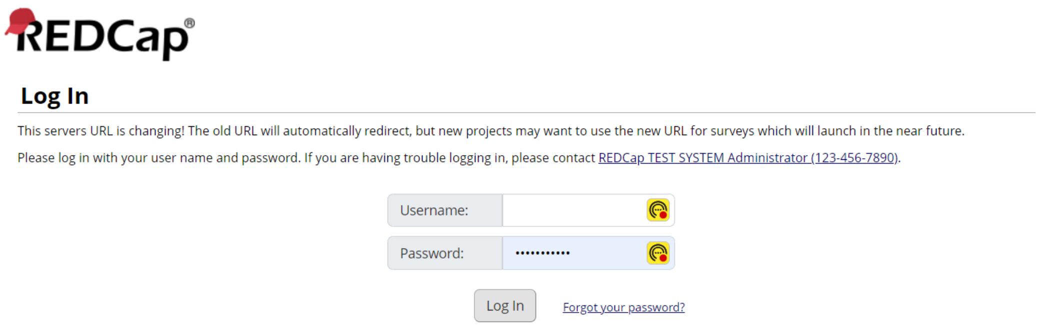
REDCap is a web-based data entry system. You can bookmark the site in your browser to make it easier to come back here. The website address to bookmark is: https://idea-redcap.research.athabascau.cloud/.

Logging In

You will need a username and password to log in. These will be provided to you by Athabasca University.



Main Dashboard

Once you are logged in, you will be taken to the main page for your organization, which should look similar to the screenshot below. On the left is the menu, and on the right is the workspace. Your organization's name will be displayed at the top of the page. The project's content depends on your access level. Your screen may look a bit different. The rest of this instruction manual will explain how to access your data in REDCap, add records, and edit records. There are multiple ways to do each of these tasks in REDCap, but this instruction manual will outline the most direct way to do them.

Where to Get Help

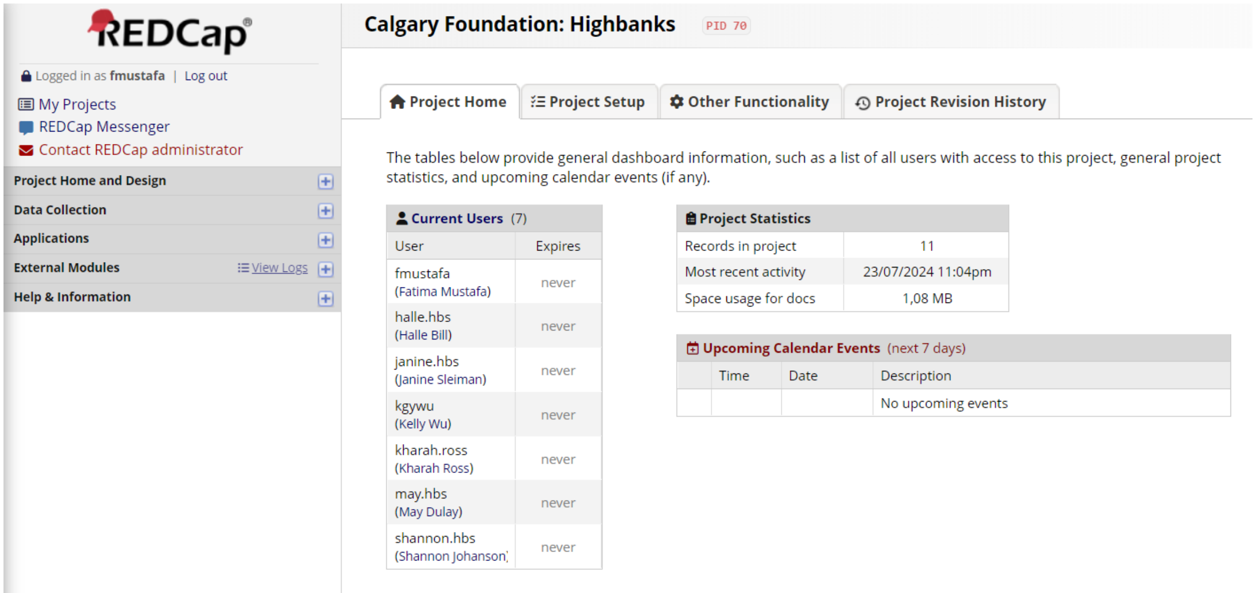
For help with logging in to REDCap, including help with Multi-Factor Authentication (MFA), contact:

IT @ Athabasca University

Gerald Abshez
REDCap Administrator
gabshez@athabascau.ca

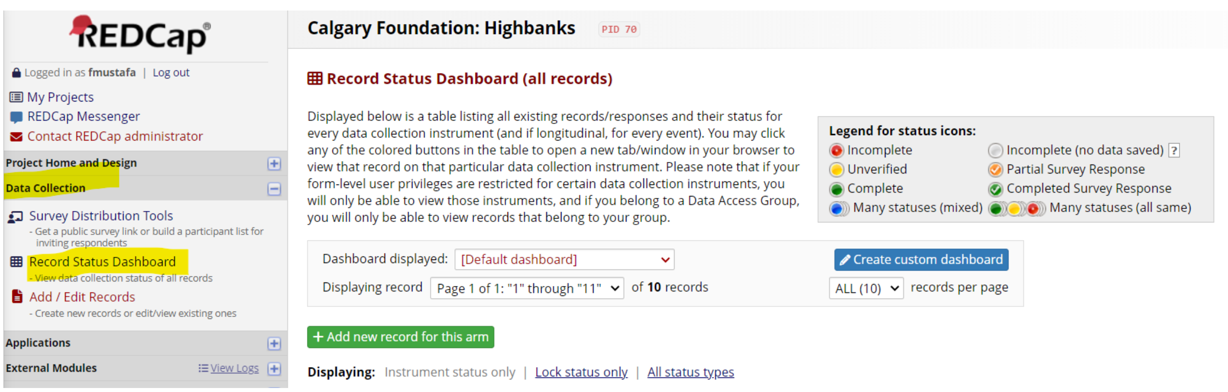
For help with the content, layout, or functionality of forms within the REDCap system, contact:

Kharah Ross
Associate Professor, Psychology
kharahr@athabascau.ca

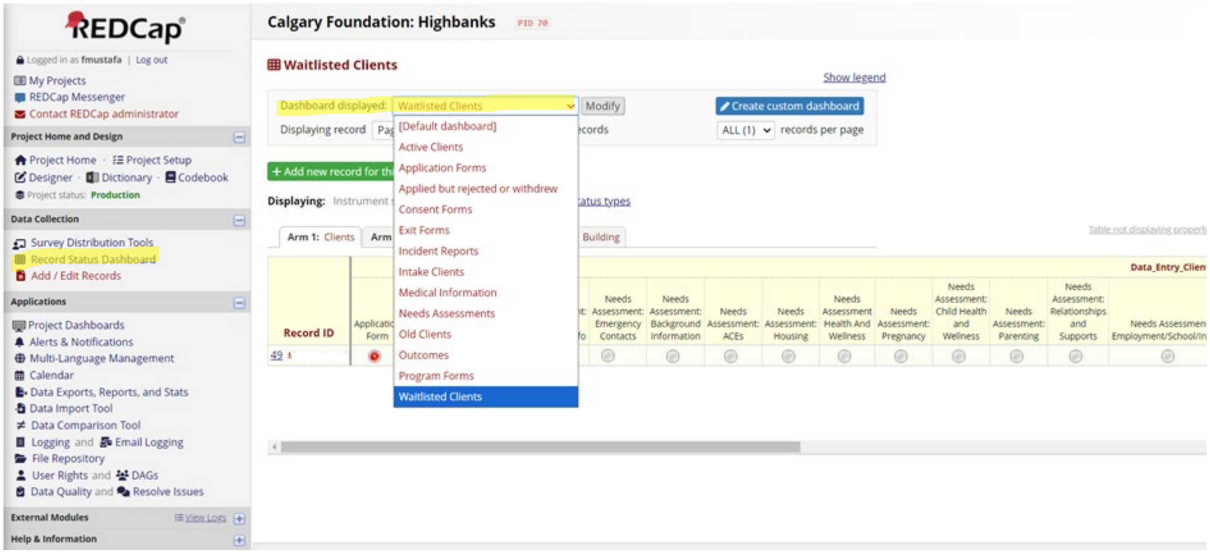


Record Status Dashboard

In the Record Status Dashboard, you can see all the clients in the system and the status of each form for each client. To get here, click on Record Status Dashboard in the left menu bar under the Data Collection section. The coloured Form Status legend below will show you the status of each form within the dashboard.



When viewing the Record Status Dashboard, you can choose to see a subset of forms based on your needs.



Use the *Dashboard Displayed* drop-down to select from the following sets of forms:

- *Default Dashboard*: This dashboard view includes all clients and all forms for which data has been entered. This would include current and old clients as well as those who were waitlisted or rejected from the program.
- *Active Clients*: Shows only clients that have been accepted into the program and have not yet exited the program. To ensure the dashboard shows the relevant client data, make sure to document the application decision on the application form for each client.
- *Application Forms*: Select this to see the form used for initial application and intake for active clients
- *Applied but rejected or withdrew*: This dashboard view shows only those applicants who applied for the program but were either rejected or withdrew their application after they were accepted. To push client data to the relevant dashboard, you would need to make sure to document your application decision for each client on the application form.
- *Consent Forms*: Select this to see all consent forms for active clients
- *Exit Forms*: Select this to see all exit forms for both planned and unplanned exits for active clients who are leaving the program.
- *Incident Reports:* See any incident reports for clients, staff, volunteers, or the building (active clients only)
- *Intake Clients:* This dashboard shows clients who have filled out the application form but for whom an application decision has not yet been made in the application form.
- *Medical Information*: Select this to see forms that contain relevant medical information and emergency contact information (active clients only)

- *Old Clients*: See data for clients that were previous residents who have now left the program (this is where Alumni will be found). Client data is moved to the old client dashboard once a staff member begins to enter the exit or unplanned exit forms or the program end date in the program progress tracker.
- *Needs Assessments*: Select this to see all forms that are part of the Needs Assessment Process for active clients
- *Outcomes:* Select this to see all forms that are a part of capturing outcomes for active clients
- *Program Forms*: Select this to see forms related to the ongoing program management for active clients
- *Waitlisted Clients*: This dashboard shows all the clients who are waitlisted. A client's data is pushed to the waitlisted client dashboard when a staff member selects "waitlisted" as the outcome of their application at the end of the application form. If a client's application status is updated to "accepted" in the application form, then their data will automatically move from the waitlisted clients' dashboard to the active clients' dashboard. If the waitlisted client is rejected later and the status of their application is updated to reflect this, then client data will again be pushed automatically into the "applied but rejected or withdrew" dashboard.

Remember that staff do not have to manually manage dashboards or manually push clients from one dashboard to another. Client data is automatically moved from one dashboard to another based on the forms that are being filled and the data that is being entered.

List of Forms

The following forms are part of the Highbanks Society data collection system.

Arm	Form Name	Description
Arm 1: Clients	Application Form	Collect client demographic details, parenting and pregnancy details, current living situation, employment/school and income details, health concerns, legal concerns, and references.
	Consent Form: Services	This form helps clients understand what they can expect from Highbanks Society in terms of services and what commitments Highbanks Society expects from all program participants. Clients consent to receive services and agree to the terms of those services.
	Consent Form: Collection and Use of Data	This form provides details about how client information will be collected and used and who information may be shared with. Clients consent to the use and collection of their information as described.
	Program Progress Tracker	Use this form to document a client's move-in date and move-out date.

	Needs Assessment: Client Contact Information	This form is used to verify client contact information provided on the Application Form, and to document the assigned Room Number and move-in date.
	Needs Assessment: Emergency Contacts	This form is used to collect emergency contact information for clients. Up to two emergency contacts can be included.
	Needs Assessment: Background Information	This form collects additional details about the client's background, including race/ethnicity and an ACEs Questionnaire.
	Needs Assessment: ACEs	Complete the ACEs screening assessment with your client
	Needs Assessment: Housing	This form collects details of the client's housing history.
	Needs Assessment: Health & Wellness	This form collects details on mental and physical health concerns, allergies and dietary restrictions, medications, substance use, and details about the family doctor.
	Needs Assessment: Pregnancy	This form collects details about the client's pregnancy, if applicable.
	Needs Assessment: Child Health & Wellness	This form collects demographic and health details about the client's child(ren)
	Needs Assessment: Parenting	This form collects details about parenting and custody for each of the client's children
	Needs Assessment: Relationships and Supports	This form collects details about the client's relationship status and partner, as well as natural and professional supports.
	Needs Assessment: Employment/School/Income	This form collects details about the client's education history, current employment, and income sources.
	Needs Assessment: Legal Concerns	This form collects details of any legal cases or related issues the client is facing.
	Needs Assessment: Client Documentation	Use this form to document which forms of ID the client has or needs to apply for. There is also space to document the status of ID for the client's child(ren).
	Program: Resources	Use this form to document recommended resources related to mental health, housing, financial supports, food, education, parenting support, pre- and post-natal support.
	Program: Case Notes	Use this form to document meetings with the client, including if they attended, how they are feeling, how the meeting went, and details of goals discussed and plans for action and follow-up. This form is created multiple times for the same client.
	Program: Incident Report	Use this form to document any incidents related to the client.

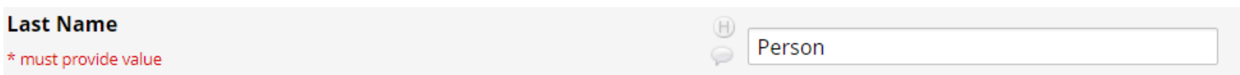
	Program: Safety Plan	Complete this form with the client to create a safety plan when there is a risk for relationship violence or other kinds of safety concerns. Multiple instances of this form can be created for a client.
	Program: Education Plan	Use this form to document the Education Plan developed with the client.
	Program: Attendance Highbanks	Use this form as needed to document the client's attendance/completion for Life Skills, Course Homework and Readings, Cooking and Cleaning Duties, Room Checks, and Sunday Chores. This form is to be completed any time one of these events occurs.
	Outcomes: Flourishing Scale	Complete this standardized measure of the client's self-perceived success in important areas such as relationships, self-esteem, purpose, and optimism. This is an outcome form that will help you capture the impact of your program. It can be completed multiple times (e.g. during program entry and exit).
	Outcomes: FCSS	Complete this form as appropriate. This outcomes form has two sections. The first section captures the experiences of Indigenous clients, and the second section captures parenting experiences.
	Outcomes: Program Feedback	Send this form to the client so they can provide feedback on the programs and services provided to them at Highbanks Society. This form can be completed multiple times (e.g. once a year).
	Exit: Planned	Complete this form with the client when they leave Highbanks Society with a planned departure (graduated, found housing elsewhere, no longer want to participate, no longer eligible to participate, asked to leave the program, etc.)
	Exit: Unplanned	Complete this form if the client leaves Highbanks Society with an unplanned departure (eviction, left unexpectedly, did not return after a medical emergency, etc.)
	Alumni Form	The alumni form should be shared with previous clients, ideally 6-12 months after they have left the program.
	Communication Notes	Use this form to document any communication with the client (communication could be in person, by phone, by email, etc.) outside of scheduled check-ins and meetings.
Arm 2: Staff	Staff Incident Report	Complete this form where there is an incident involving a staff member.
Arm 3: Volunteers	Volunteer Incident Report	Complete this form where there is an incident involving a volunteer.

Arm 4: Building	Building: Incident Report	Complete this form to document incidents when there is an event, such as damage to the building (flood or fire), utilities-related concerns, or complaints from neighbours.
	Building: Staff Notes	Use this form to document any update at the end of a shift that the next staff taking over should know, such as that a repair person is expected to arrive in the evening to fix the heating.

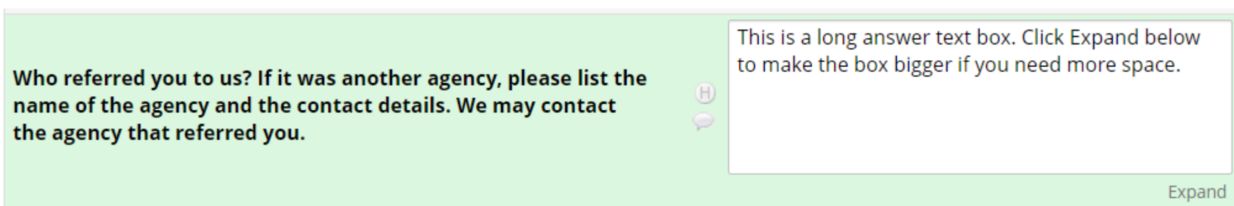
Field Types

Across all forms, you will encounter the following field types:

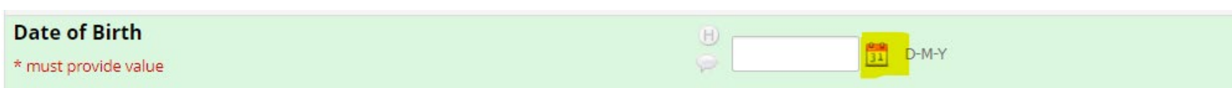
Short answer field (e.g., name, address)



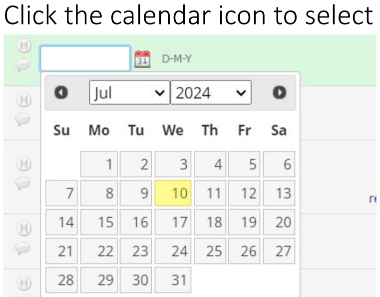
Long answer field (e.g., comment box)



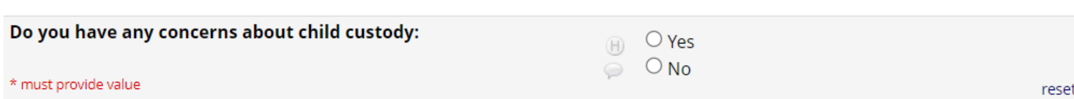
Date



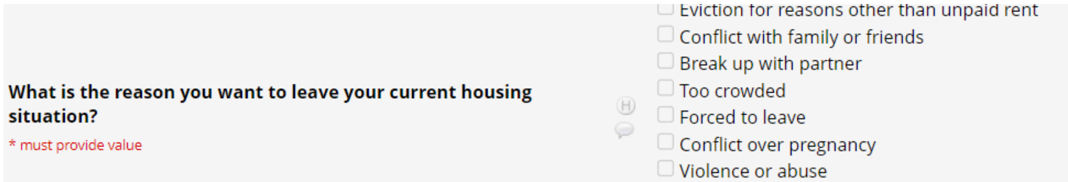
Click the calendar icon to select the date.



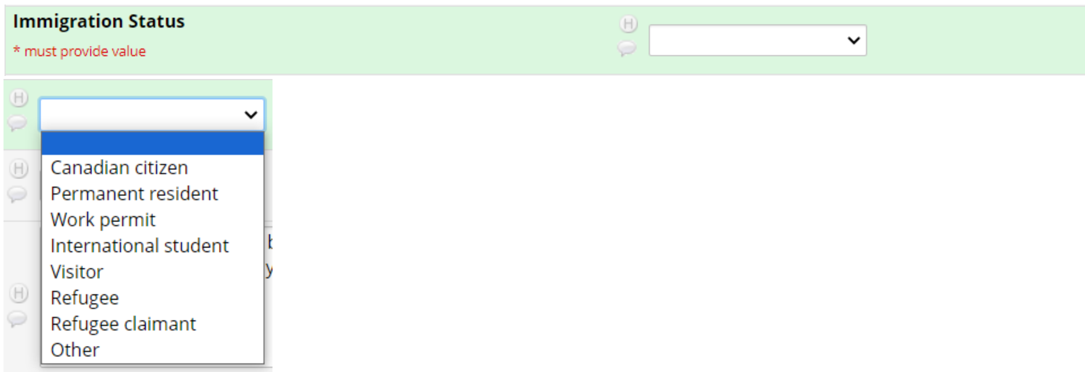
Multiple choice (choose one. Click the reset button below to clear your choice.)



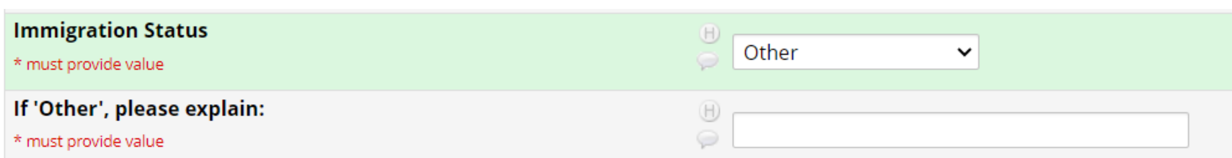
Multiple choice (choose all that apply)



Drop-down field (choose from a pre-determined list of options)

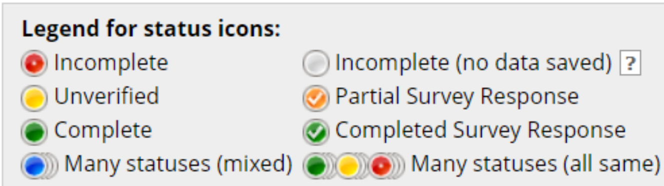


Conditional branching questions (in the example above, if you select ‘Other,’ a new text box will appear so you can provide more details). ***Note*** If you select ‘Other’ and provide a response in the text box below but then later change your drop-down response to something else, the text you wrote in the text box will be deleted, and the field will be removed.



Form Status

There is a range of status options for forms in the system, as shown by the coloured legend below. You can change the status of a form manually when you save it.

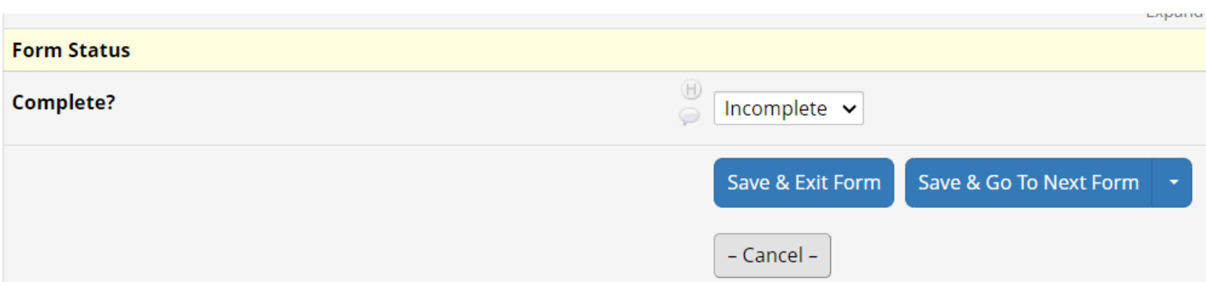


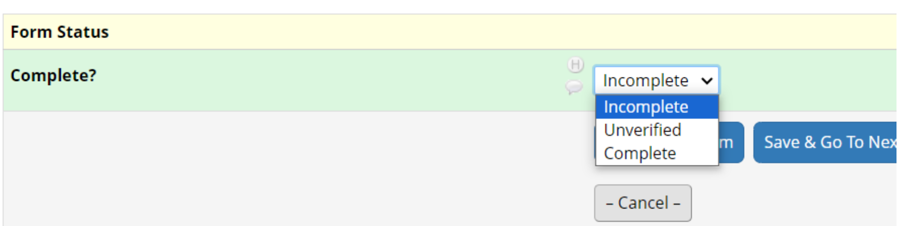
Incomplete (red):	There is more information that needs to be entered in the form
Unverified (yellow):	You have entered all the information but need to double-check something with the client or need an internal review
Complete (green):	All information has been entered and verified
Mixed (blue):	For forms where multiple instances occur for the same client, blue shows that there is more than one form, and they have different status types
Incomplete (grey):	This form has not yet been started for this client
Partial (orange check):	Form was completed by the client in survey form and has missing data
Completed (green check):	Form was completed by the client in survey form, and all fields have been filled in

Save a form

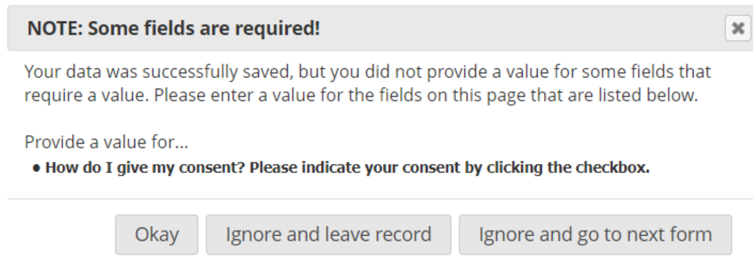
Once you have finished entering information, at the end of the form, you can Save and Exit or Save & Go To Next Form. If you click Cancel, anything you have entered on the form will not be saved. The Save menu also appears in the top right corner as you complete any form.

Check the Form Status section and choose Incomplete, Unverified, or Complete in the drop-down menu before saving.





If you have not completed all the required fields before saving the form, you will see an error message. The error message will show you which field is missing a required value. You can click Okay to return to the form and fill in the missing field, or you can continue to save and leave the form. A form's status cannot be verified or completed until all data has been entered.



REDCap Account Form

To be submitted to Athabasca University IT (gabshez@athabascau.ca) with the Subject Header: “Highbanks Society: REDCap Account”

Is this a:

☐New account

☐Change to an existing account

New Account

First Name: Click or tap here to enter text.

Last Name: Click or tap here to enter text.

Email: Click or tap here to enter text.

Change to an Existing Account

Existing account information:

First Name: Click or tap here to enter text.

Last Name: Click or tap here to enter text.

Email: Click or tap here to enter text.

I would like to:

☐ Delete account

☐ Renew account

☐ Modify account

Please indicate a new first or last name or an email address: Click or tap here to enter text.

Submitted by: Click or tap here to enter text.

Role within the organization: Click or tap here to enter text.

Date: Click or tap to enter a date.