FCSS SOCIAL INCLUSION INDICATORS (FSII)

USER REFERENCE GUIDE
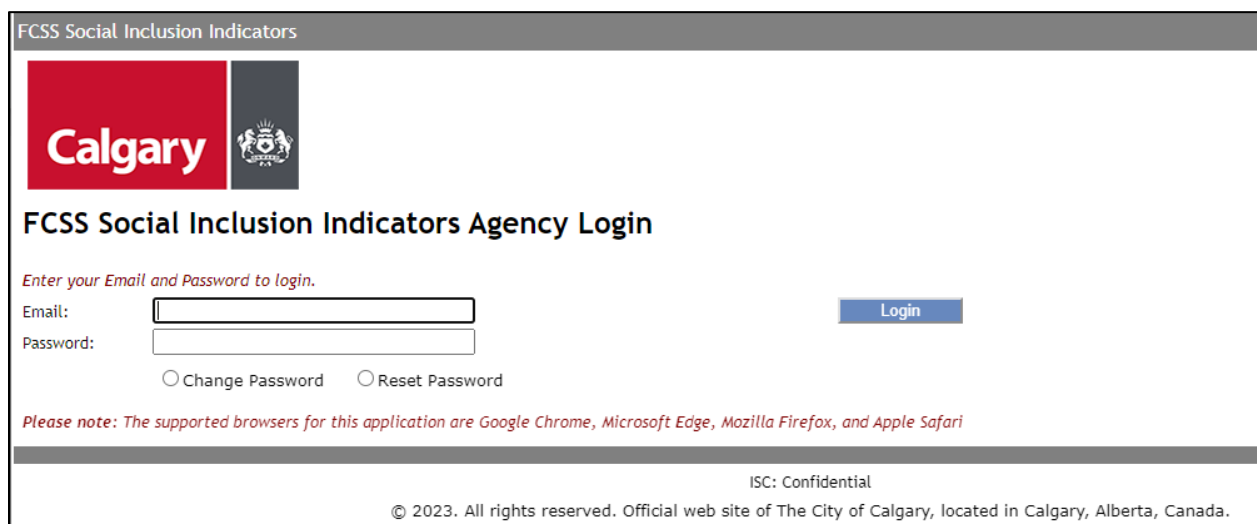
Revised January 2025

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INTRODUCTION

The FCSS Social Inclusion Indicators (FSII) application allows users to add a client's data in a clean and easy to follow manner. Users are able to see a client's prior history and can run a client count report to show how many forms have been entered into FSII for that client during a given period of time (date range). This User Guide provides you step-by-step instructions for how to use FSII v4.

GETTING STARTED: ACCESSING FSII

Step 1: Accessing the FSII login page

To access FSII, please go to https://fsii.calgary.ca.

LOGIN E-MAIL AND PASSWORD

Login requires an e-mail address and password. The e-mail address is the one registered with FCSS for FSII data entry. It may be either a personal e-mail address or a general e-mail address used by several people who enter data into FSII. To get access to FSII, your program manager needs to complete this form. They need to provide the agency name, your name and e-mail address, and your telephone number.

Once your e-mail address is registered, a temporary password will automatically be sent by FSII to that e-mail address. **This password will need to be changed the first time you logon to FSII. Your new password must have at least eight (8) characters and include at least one uppercase letter, one lowercase letter, one number, and one special character (such as $, %, !, or #).** To change your password select Change Password then enter your old password followed by your new password and confirm your new password. Then hit the blue "Login" button.

If you forget your password, you can reset it yourself by entering your e-mail address, selecting the Reset Password and clicking the blue "Reset" button. A new temporary password will be sent to your e-mail address. If you have difficulty, please contact FCSS.Indicators@calgary.ca.

Step 2: Logging onto your FSII account

Login to the site by entering your email and password then clicking the blue "Login" button.

After you have logged in, a new screen will appear that is called "Data Entry Management."

Each organization will see all the programs associated with it. For instance, if an organization operates four FCSS-funded programs, staff from that organization with access to FSII will be able to see all four programs in the dropdown menu. Under each program, you will only be able to fill out the surveys that have been selected in your program application and reviewed by your Partnership Specialist. If your program wishes to make change which survey(s) your program uses, this must be discussed with your program's Partnership Specialist.

Step 3: Entering Client Data

Select the program you are going to enter client data for.

Helpful Hint: If your organization has more than one program, it is important that you are careful when selecting your program name from the drop-down list. FSII cannot prevent you from entering data for a different program within the same organization.

Once the correct program has been selected, enter the <u>first 2 letters of the client's first and last name</u> and <u>EITHER the date of birth **or** the client's age</u> and press the "Search Client" button located on the upper right-hand side of the page. Please make every effort to <u>carefully</u> complete all three Client ID fields (first name initials, last name initials, and date of birth or age) to produce the most secure and consistent client ID number now and when entering data in the future.

Helpful Hint: You do not have to press the tab key to move between fields. Once filled in, FSII will move your curser to the next field to help with your data entry!
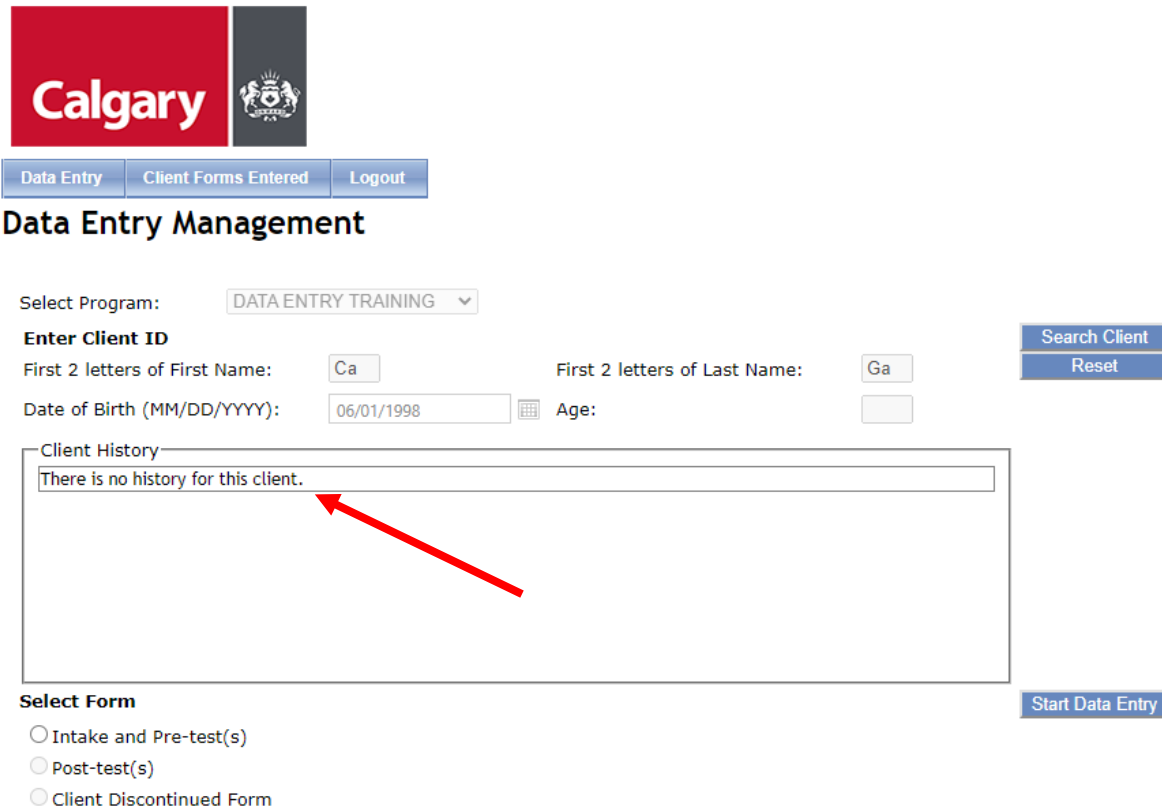
Client search is not case sensitive. You do not need to enter initials in upper case as FSII automatically makes them upper case once entered. You can search for your client using upper- or lower-case letters.

Please be consistent in entering initials and date of birth (or the age <u>first entered</u>) every time you search for your client in FSII. Whatever initials and date of birth (or age) you use the first time you enter the client in FSII, you MUST use the same initials and date of birth (or age) EACH TIME for that client. If you make an error, you will not be able to find the client history.

Helpful Hint: Keeping your own records of how and when clients are entered into FSII will help ensure easy future access and locating of client data. You can use the Client Tracking Sheet listed on the FCSS Resource Page to help track this information.

Step 4: Looking up Client History

After clicking Search Client, the "Client History" box will show if there are any forms for this unique client entered under your program in FSII. If the client has no data in the system, the client history box will say "There is no history for this client."

If there is client data, the Client History box will display the survey name, survey type (i.e., an intake form, pre-test, post-test, or client discontinued form), the registration date, test date, client discontinued date, and data submission date.

Client history will help you when entering client data because you can see what type of surveys have been entered and when they were entered into FSII. Since surveys can be misplaced by accident or collected several times during the year, this information will help you decide whether to continue entering information for this client or move onto a new client.

Helpful Hint: If at any time, you wish to start entering data for a different client, press the "Reset" button located at the upper right-hand corner of the page and it will clear all fields.

Step 5: Entering new data for a returning client

After you have reviewed your client's history and see they have an intake, a pre-test, and post-test from a previous date and you have a <u>new intake and pre-test</u> that must be entered, you must first complete a discontinued form for this client before you can enter a new intake and pre-test. Once you have searched the client history, select "Client Discontinued Form" and then press "Start Data Entry." If you just need to enter another post test, select "post-test(s)" and press "Start Data Entry."

When submitting a "Client Discontinued Form," you are required to enter the client discontinued date. **If you are going to enter new data for that client right after completing this form, be sure to make the discontinued date an earlier date than the new intake and pre-tests.** After you submit the Client Discontinued Form, you will be taken back to the Data Entry Management page, where you can simply choose the "Intake and Pre-Test(s)" forms for this client.

SELECTING A FORM

Now it is time to select the form you will enter into FSII. If you are entering a new intake and a one or more pre-tests, you must enter all forms together. This is a data quality control measure.

Step 6: Entering a form on FSII

After you have searched your client's history, select a form from the options available.

If you are entering data for a new client, the only form that you will be able to choose is the "Intake and Pre-Test(s)" forms. Once you have selected a form, press the "Start Data Entry" button on the lower right-hand corner of the page.

At the top left of the intake form, you will see the program name, agency, and Client ID. On the top right, you will see the number of the survey you are completing.

You will also notice that the "Registration Date" field is empty on the intake page. You must fill in this date <u>before</u> you can move past the intake page. ***If you do not enter the registration date, FSII won't let you to go to the next page.***

The <u>registration date</u> on the intake form may be different than the <u>test dates</u> on the pre-tests and post-tests.

The "age" field in the intake form is automatically filled in from the date of birth or age you entered while searching for your client on the Data Entry Management page.

Step 7: Entering Intake Form Data

Continue to enter all intake data for your client in the appropriate fields.

Helpful Hint: Some of the fields on the intake form and other surveys are locked. These fields will unlock if a previous question is answered in a certain way.

An example of this is the Born in Canada question. If you choose "Yes," you would not be able to type in the Country of Birth and number of years in Canada. If you choose "No," then you are able to type in data for those fields.

There are other open-ended questions too, such as "Other Population Group." Please be consistent when entering this type of response. It is best to type the first initial in <u>Upper Case</u> followed by all <u>lower case</u> letters (e.g., as in 'Germany' shown above).

Once you have completed the Intake form, press "Next" located at the bottom of the page.

Once you press "Next," FSII will take you to the surveys your program is required to complete.

Helpful Hint: If you wish to go back to a previous survey, you can simply press the "Previous" button located to the left of the Next Button at the bottom of each page. You can also reset the whole page by pressing the "Reset" button located to the right of the Next button.
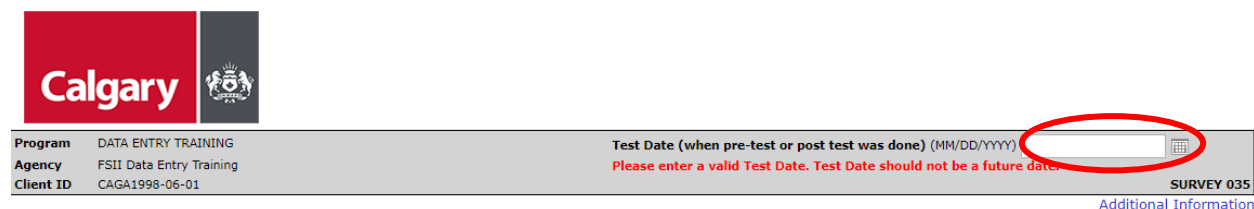
If you want to <u>cancel this entry for a client</u> and start fresh from the Data Entry Management page, you can simply press "Cancel" in the bottom right-hand corner of each survey page. A pop-up box will appear asking you if you are sure you wish to cancel because <u>all data will be lost</u>. Press "OK" if this is what you want to do. If you hit cancel by mistake on a survey, just hit "cancel" in the pop-up box and it will keep you on the same page.
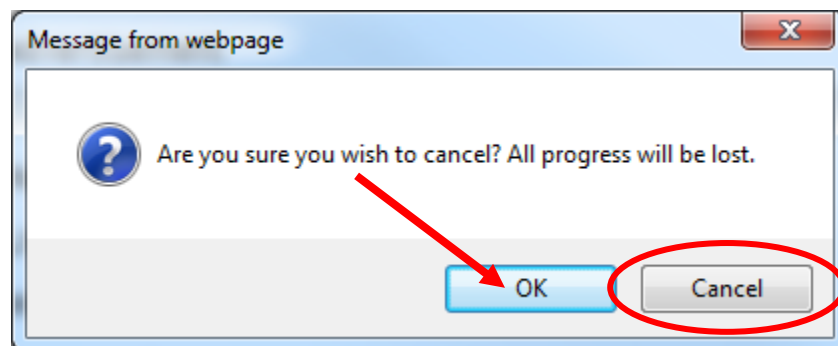
Step 8: Entering Survey Data for a Client
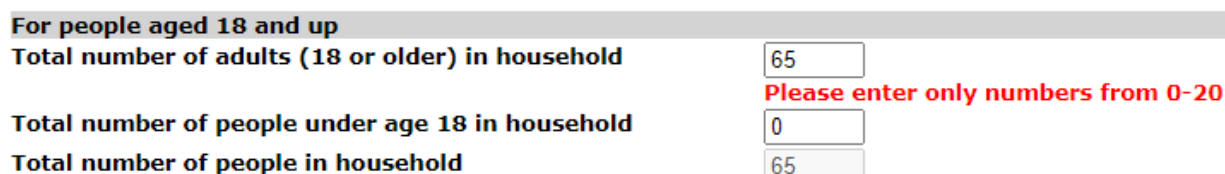
Once you have completed the intake form, you will be prompted to enter the pre-test(s). The name of the survey and the survey number are located at the top of each page.

On the upper right-hand side of each survey page, you will find the "Test Date" field. The test date <u>must</u> be entered into this field. If you do not enter the test date, you cannot submit the data. ***The Test Date may be the same as the Registration Date or it may be a later date.***

If you have made data entry errors, they will be shown to you before you are able to proceed with the next survey. An example of an error message appears below.

Step 9: Submitting your survey data

Once you have entered the last surveys you are required to complete, press "Next" and you will see a pop-up screen that says that you are about to submit your survey data and asks if you are sure you wish to continue. If you are ready to submit, please press OK. If not, simply press Cancel and you can go back into your surveys to make changes before submitting.
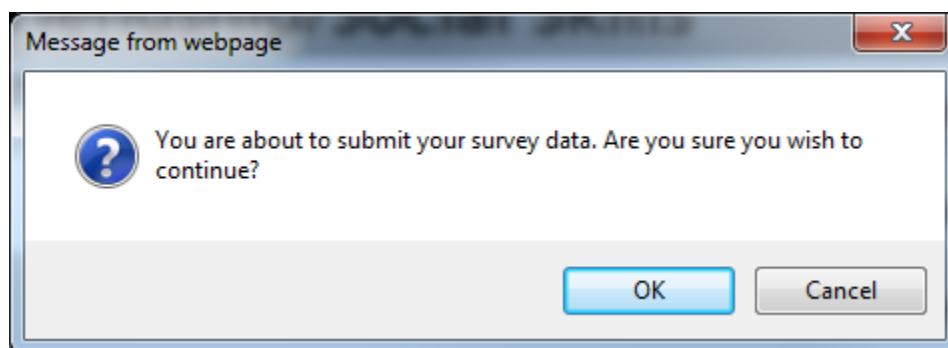
Once you press OK, you will be taken back to the Data Management page where you will be able to see the client history you just entered into FSII. This is also the start page. This is where you can either press "Reset" to start data entry for a new client or, if you have post-tests or a client discontinued form for the client you just entered data for, you can simply select the form you need to complete and follow the same directions as above.

AFTER DATA ENTRY

Step 10: Reviewing Client Forms Entered into FSII

FSII lets you see client counts and the number of different forms entered for each of your programs. You will find the "Client Forms Entered" tab for this report at the upper left-hand side of the Data Management page.

Once you have clicked on the "Client Forms Entered" tab, select the "Program" from the drop-down menu and choose the "Start Date" and "End Date" for the <u>submissions</u> you would like to review. Then press "Start." After pressing Start, you will see two tables: "Forms Submitted" and "Surveys Entered."

Data Entry | **Client Forms Entered** | **Logout**

Client Forms Entered

Select Program: DATA ENTRY TRAINING ✓
Select date range that forms were entered (submitted) into FSII:
Start Date: (MM/DD/YYYY)   End Date: (MM/DD/YYYY)
09/01/2022   02/17/2023   **Start**

Enter the START date in this cell. This is not registration date but data submission date.   *Enter the END date in this cell. Once you specify start and end dates for data entry, you will get counts of forms entered during those dates.*

Export as XLS   **Export as PDF**

Table 1. Count of Unique Clients and # of Forms entered in FSII between 2022-09-01 and 2023-02-17

Survey Number	Type of Form	# of Unique Clients	# of Forms
001	INTAKE	9	9
035	PRE	9	9
	POST	4	4
002	DISCONTINUE	4	4

Total number of intakes entered during the specified timeframe.
Total number of pre-tests entered during the timeframe.
Total number of post-tests entered during the timeframe.
Total number of discontinued forms entered during the timeframe.

The <u>third column</u>—**# of Unique Clients**—counts the number of "unique clients" who had intakes, pre-tests, post-tests, and client discontinued forms entered within the date range you chose. This counts the number of **individual clients** who had data entered in each of those categories during the specified timeframe.

The fourth<u> column</u>—**# of Forms**—counts the number of intake, pre-test, post-test, and client discontinued forms entered. A unique <u>client</u> may have multiple <u>forms</u> submitted (e.g., if the program uses more than one survey).

Any surveys entered for clients either <u>before or after the date range</u> selected will **not** be shown in these tables.

Helpful Hint: You can find counts of forms using the "Client Forms Entered" tab by specifying <u>data entry dates only</u>. FSII cannot count forms by registration dates or test dates. Therefore, the counts you get from FSII may not be comparable to the ones you get from Partnership Specialist or the Research team because the counts for those reports are based on test dates, not data entry dates.

SESSION TIMEOUT

If FSII is idle for 30 minute or more, you will be logged out. In this case, you are required to log in again. **Any <u>forms that were started but not submitted</u> will be lost and will need to be re-entered if your session expires.** Please ensure you complete and submit a form before you take a break.

LOGGING OUT

To logout, select the "Logout" button on the top left-hand corner of the Data Entry Management page. This will take you back to the original login screen.

ONGOING FSII DATA ENTRY SCHEDULE

Indicator surveys collected each month must be entered into FSII by the 15th of the following month. For example, surveys collected between April 1 and April 30 must be submitted by May 15. If you do not submit all the surveys collected each month by 15th of the following month, the reports produced by FCSS Calgary will show fewer clients than your program served.