



# Workforce Development Agreement REDCap Technical Guide

## How to Navigate REDCap

Version: 2.2

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Population Health IMIT Systems Support

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## Table of Contents

Introduction.....	3
First Time REDCap Access .....	5
<i>How to Get Access</i> .....	5
<i>Create Your Password</i> .....	6
<i>Two-Step Verification for REDCap Log In</i> .....	7
<i>Password Recovery Question Set Up</i> .....	10
General Log-In Information for Users .....	11
Password Resets .....	13
Navigate REDCap.....	15
<i>Access the Workforce Development Home Page</i> .....	15
<i>Create a New Client Record</i> .....	16
Data Access Groups .....	18
Switch between Data Access Groups in REDCap .....	19
<i>Complete the Participant Information Form</i> .....	20
Staff Information.....	21
Client Information.....	21
Client Address Information .....	29
Action Plan Information.....	32
Intervention Information .....	36
Form Status & Saving Your Work.....	41
Data Quality Alerts When Saving Your Work .....	43
<i>Edit a Client Record</i> .....	45
<i>Run a Report</i> .....	46
View Your Client List & Program Client List.....	46
<i>Delete a Client Record</i> .....	48
<i>Log Out</i> .....	49
Additional Resources .....	49
Help .....	49
Appendix A – WDA Intervention Titles & Codes .....	50
<i>Pre-Employment Support Services</i> .....	50
<i>Supported Employment Services</i> .....	50
<i>Supported Education Services</i> .....	51
Appendix B – Intervention Code Definitions .....	52

## Introduction

REDCap is an online secure data collection tool for all Interior Health (IH) Mental Health and Substance Use (MHSU) staff and IH contracted services providing programs and supports to clients under the federal Workforce Development Agreement (WDA).

The WDA is a cost sharing agreement between the Government of Canada and the Province of BC. Under the WDA, the Government of Canada contributes a portion of the province's annual costs for pre-employment support services, supported employment services and supported education client services.

WDA program participants are individuals with moderate to severe mental health and/or substance use issues who want to improve their basic work habits, skills, and behaviours. Clients using these services aim to improve their employability, increase their sense of independence, and enhance their opportunities for community and social integration. Programming supports include basic social skill development, supported education and training programs, and opportunities to gain and maintain employment through ongoing individualized supports.

All IH MHSU staff and IH contracted services staff providing WDA services are required to report client-level data to the Government of Canada. WDA data elements reported in REDCap are pictured below.

### WDA Data Elements

<ul style="list-style-type: none"> <li>• SIN</li> <li>• Name</li> <li>• Address</li> <li>• Date of Birth</li> <li>• Telephone Number</li> <li>• Email Address</li> <li>• Gender Identity</li> <li>• Marital Status</li> <li>• Number of Dependents</li> <li>• Disability</li> <li>• Indigenous Identity</li> <li>• Immigrant Status</li> <li>• Immigrant Year</li> <li>• Visible Minority</li> <li>• Highest Level of Education</li> <li>• Federal Official Language</li> </ul>	<ul style="list-style-type: none"> <li>• Federal Official Language (Svc)</li> <li>• Employment Status at Intake</li> <li>• Precariously Employed</li> <li>• Name of Intervention</li> <li>• Intervention Code</li> <li>• Start Date of Intervention</li> <li>• End Date of Intervention</li> <li>• Intervention Outcome</li> <li>• Credential/Certificate Earned</li> <li>• NOC for Skills Training</li> <li>• Start Date of Action Plan</li> <li>• End Date of Action Plan</li> <li>• Action Plan Outcome</li> <li>• Action Plan Outcome Date</li> <li>• Increase in Literacy and Essential Skills</li> </ul>
---	--

Employment and Labour Market Services Division
12


Data is pulled from REDCap by IH quarterly for submission to the provincial government. Data is submitted to the Government of Canada quarterly.

This technical guide outlines how to access, navigate and understand the data collected in REDCap for the WDA. For further information on the WDA and REDCap:

- **IH MHSU staff:** See the [MHSU Psychosocial Rehabilitation Toolkit](#) for further information.
- **Contracted service providers:** See the [WDA Resource Sheet](#) for further information.

See Appendix A for a list of the WDA categories (Intervention Types) and examples of services provided under each.

See Appendix B for Intervention Code definitions.

## First Time REDCap Access

IH community MHSU Managers or Team Leads and IH contracted service provider Managers or Directors must submit REDCap access requests to the IH MHSU Network.

### *How to Get Access*

To request REDCap access, provide your supervisor with the information listed below so they can forward the request to [WDA@interiorhealth.ca](mailto:WDA@interiorhealth.ca).

#### **IH MHSU staff:**

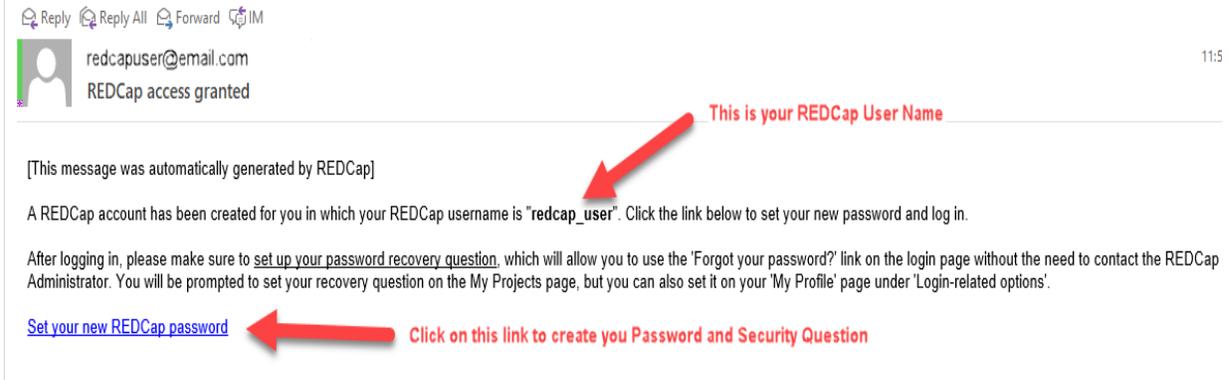
- Employee last name
- Employee first name
- IH employee mnemonic
- Employee work email address
- Program name (e.g. Trail MHSU)
- Manager name
- Team Lead name

#### **Contracted service providers:**

- Employee last name
- Employee first name
- Employee work email address
- Service Name (e.g. CMHA)
- Town
- Program Name (e.g. Clubhouse)
- Program manager name and contact information (if it has changed)

Once access is granted users will receive an automatically generated email similar to the image below. This email contains your username. Usernames are automatically assigned.

- **IH MHSU staff:** Username is your IH mnemonic (example: test4).
- **Contracted service providers (NEW):** Username is your Firstname.Lastname (example: John.Smith).



Can't find the automatically generated email in your inbox? Please check your junk e-mail folder before contacting [WDA@interiorhealth.ca](mailto:WDA@interiorhealth.ca) for assistance.

### Create Your Password

Click on the link in the automatically generated email to set up your password. See above image for where the link will appear in the automatically generated email. When you click on the link, you will land on the **Set Your Password** page, similar to the image below.



### Set Your Password

Your password has not been set yet or has been reset. You will need to set your password here to whatever value you wish. Please enter your desired password below and click the 'Submit' button. Once your password has been set, you may use it with your username whenever you log in to REDCap. Please make sure that you write down or remember your new password for future use. **The new password entered must be AT LEAST 9 CHARACTERS IN LENGTH and must consist of AT LEAST one lower-case letter, one upper-case letter, and one number**

Username: redcap\_user

Password:

Re-type password:

Create a password using the rules highlight in a red box above. Then press Submit

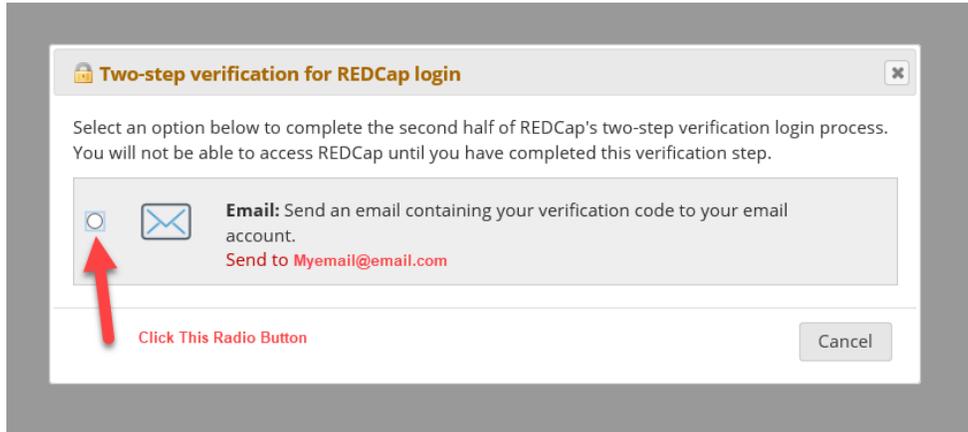
REDCap 10.8.3 - © 2021 Vanderbilt University

**Note:** Your password must be at least 9 characters in length and must consist of at least one lower-case letter, one upper-case letter and one number.

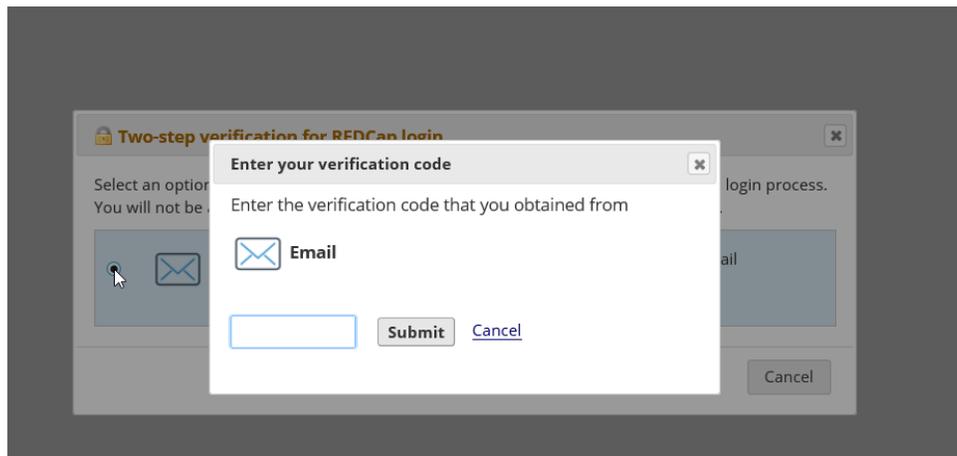
You will be asked to enter your password and then re-type the same password. Then click the **'Submit'** button.

## Two-Step Verification for REDCap Log In

After clicking 'Submit', you will see the **Two-step verification for REDCap login** screen, pictured below. Click on the radio button to have a single-use verification code sent to your work email address.



You will then see the screen below.

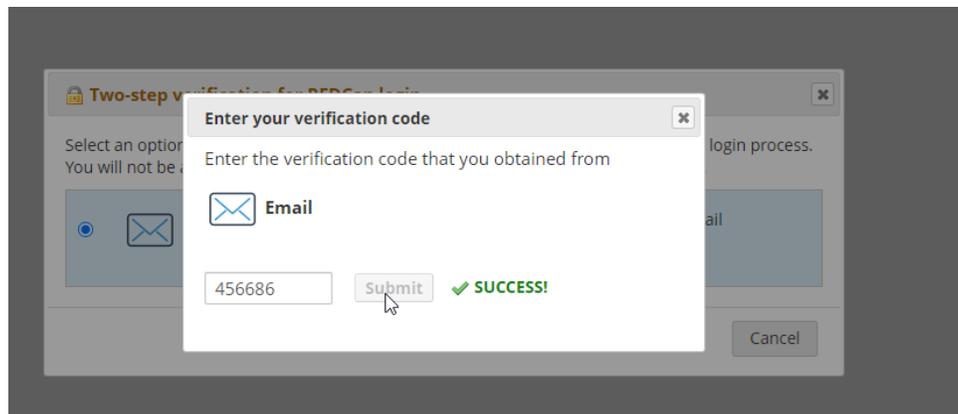


To find your verification code, go to your email inbox. The email containing your verification code will look similar to the email pictured below. If the email containing your verification code is not in your inbox, check your junk email folder. Enter the verification code in the email you receive.



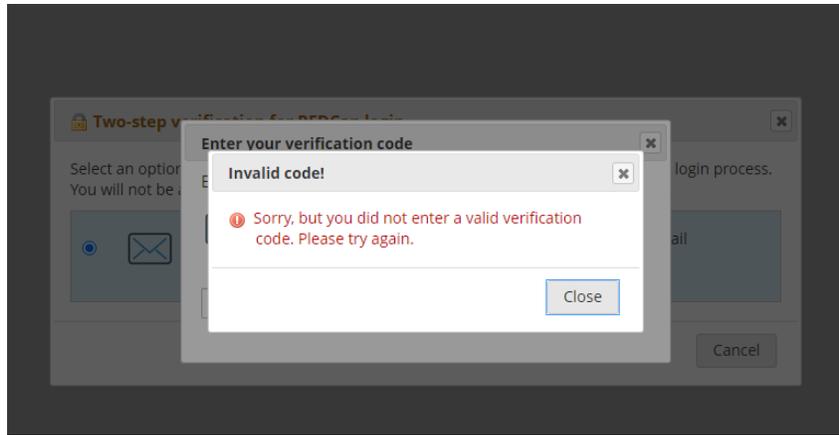
Now enter your single use code into REDCap as pictured below and press the ‘**Submit**’ button. You should see a green **Success** message like the one below.

If you do not see the **Success** message, check the code in your email inbox and enter it again.



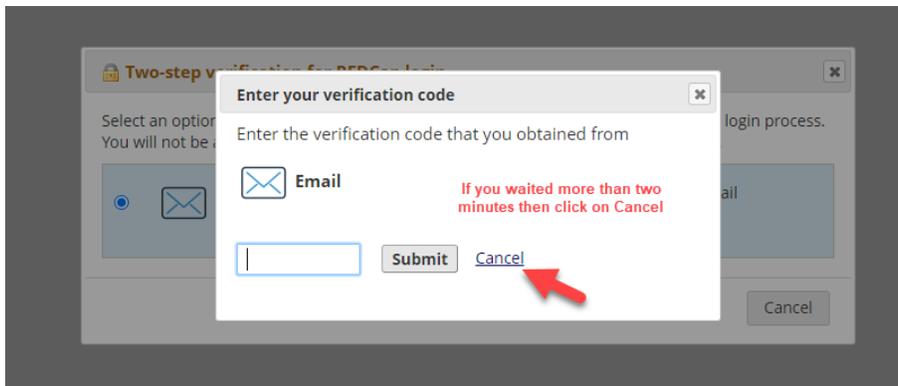
**Note:** You only have two minutes from the time you get the REDCap verification code email to enter the single-use verification code into REDCap.

If you enter the wrong code or if you enter it more than two minutes after you receive the email with the verification code, you will see the message pictured below.

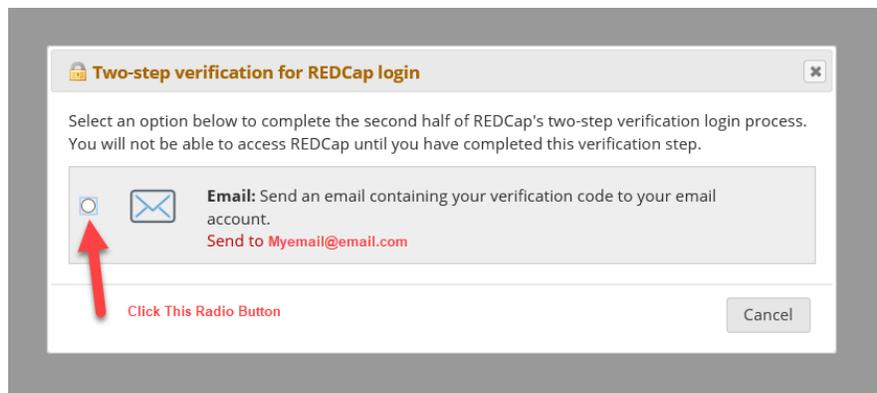


If you entered the wrong code and see the image above, click on '**Close**' and repeat the steps above.

If more than two minutes has passed since you received the REDCap 2-step verification code, click '**Close**', pictured above, and then click '**Cancel**', pictured below.



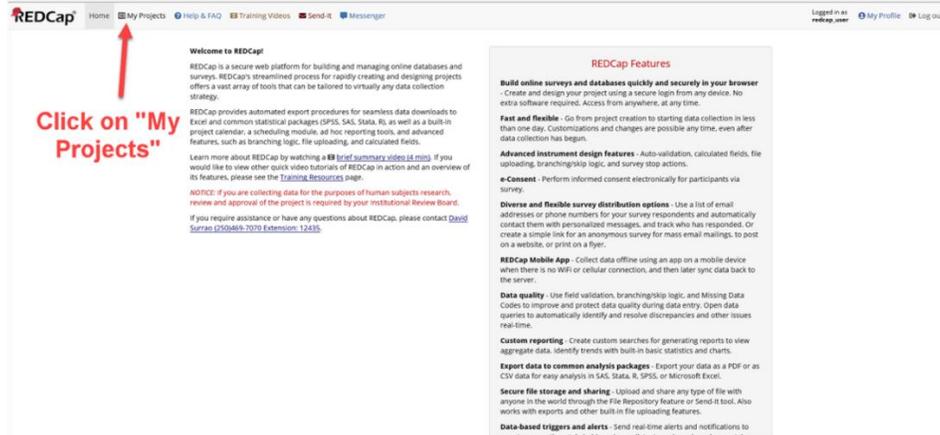
Now click on the radio button again (pictured below) and REDCap will send you a new verification code. You cannot use codes more than once or if the two-minute time limit has expired.



Repeat the steps above to complete this process and log in to REDCap.

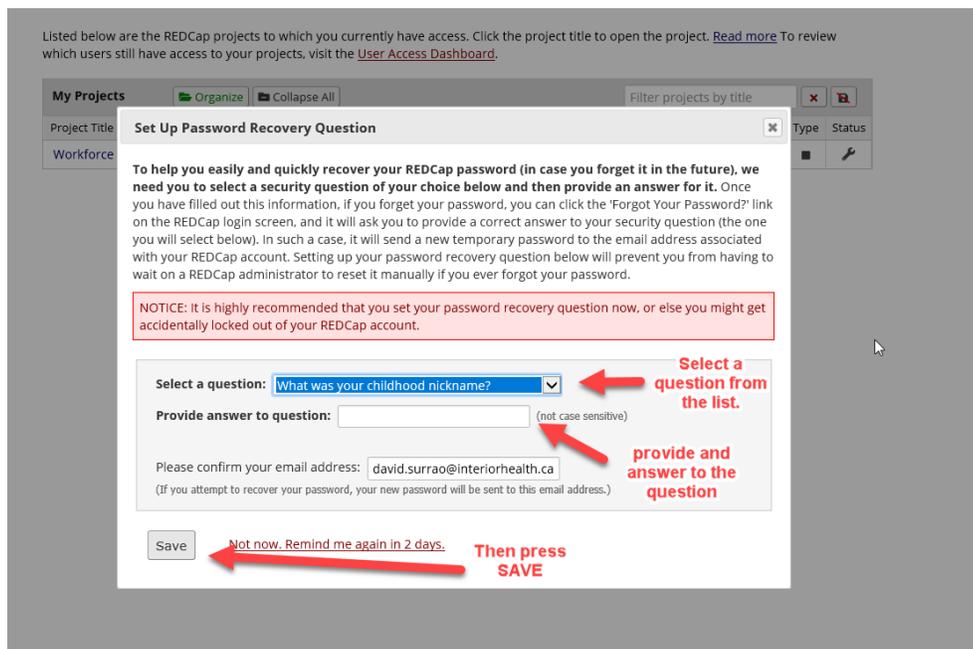
## Password Recovery Question Set Up

After you have successfully logged in you will see the home page below. Click on the link called 'My Projects'.



You will now see the **Set Up Password Recovery Question** screen. This screen allows you to create your password recovery question. To set up your password recovery question:

1. Select a question from the drop-down menu.
2. Type an answer to the question you selected.
3. Enter your email address.
4. Click '**Save**'.



You are now set up in REDCap and can begin reporting.

## General Log-In Information for Users

Once you have followed the steps above and are set up in REDCap, log in to REDCap by opening a Web Browser and typing <https://redcap.interiorhealth.ca/redcap/> in the URL at the top of the page. Google Chrome is recommended.

You will now see the REDCap Log In page pictured below. Enter your username and password, then click 'Log In'.



### Log In

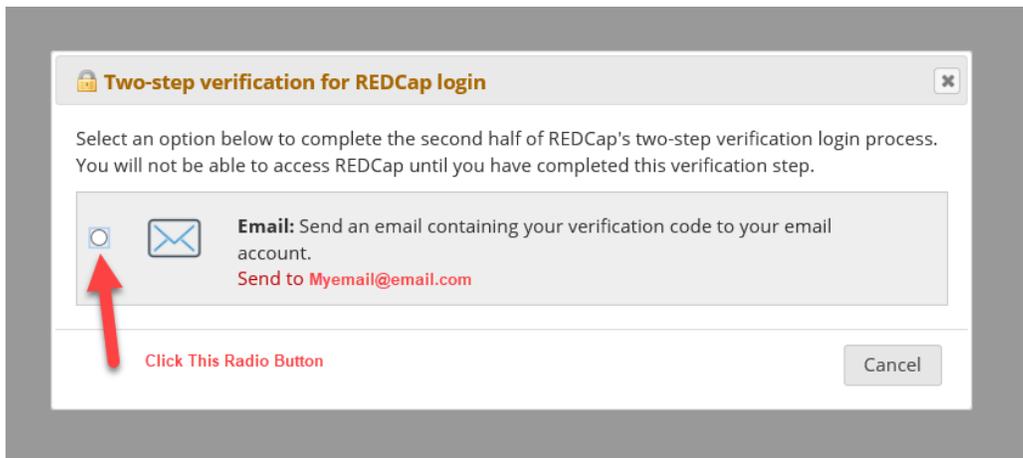
Please log in with your user name and password. If you are having trouble logging in, please contact [REDCap Administrator](#).

Username:

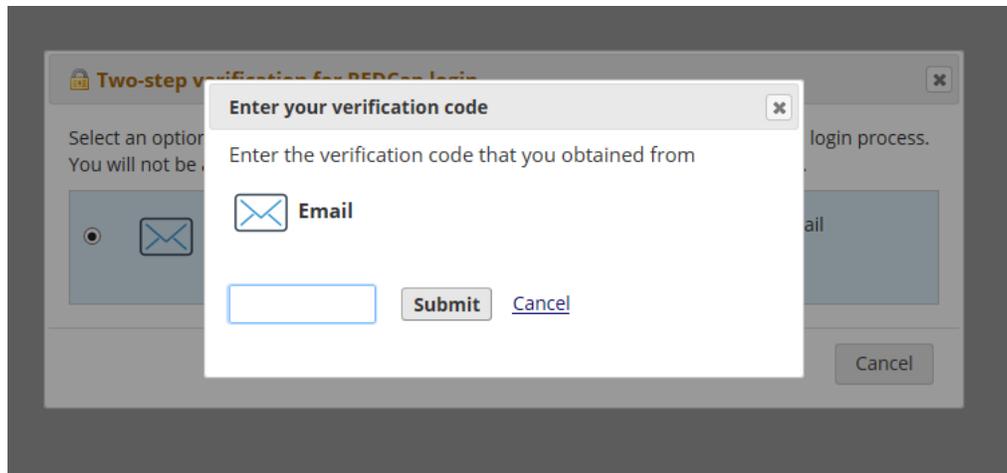
Password:

Log In [Forgot your password?](#)

You will then see the **Two-step verification for REDCap login** screen, pictured below. Click on the radio button and a single-use verification code will be sent to your email address.



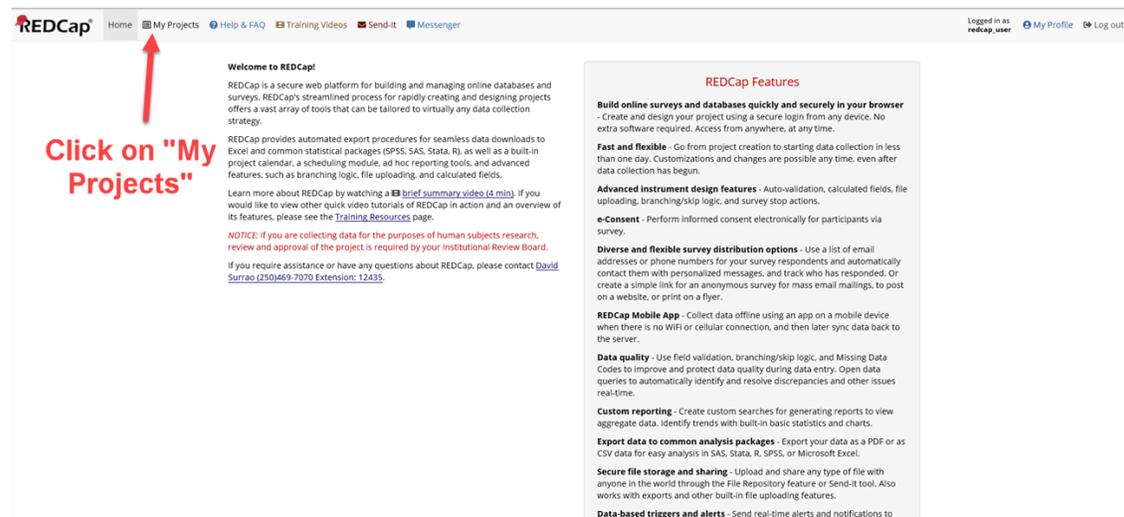
Enter the verification code sent to you in the **Enter your verification code** field, similar to the image below.



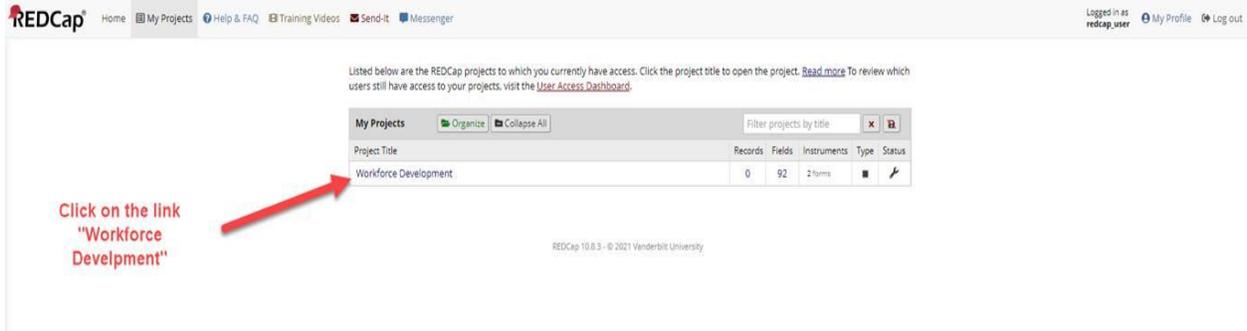
Click **'Submit'**, pictured above, to navigate to the REDCap home page.

**Note:** For security purposes, you will be asked to enter a single-use verification code every time you log in to REDCap.

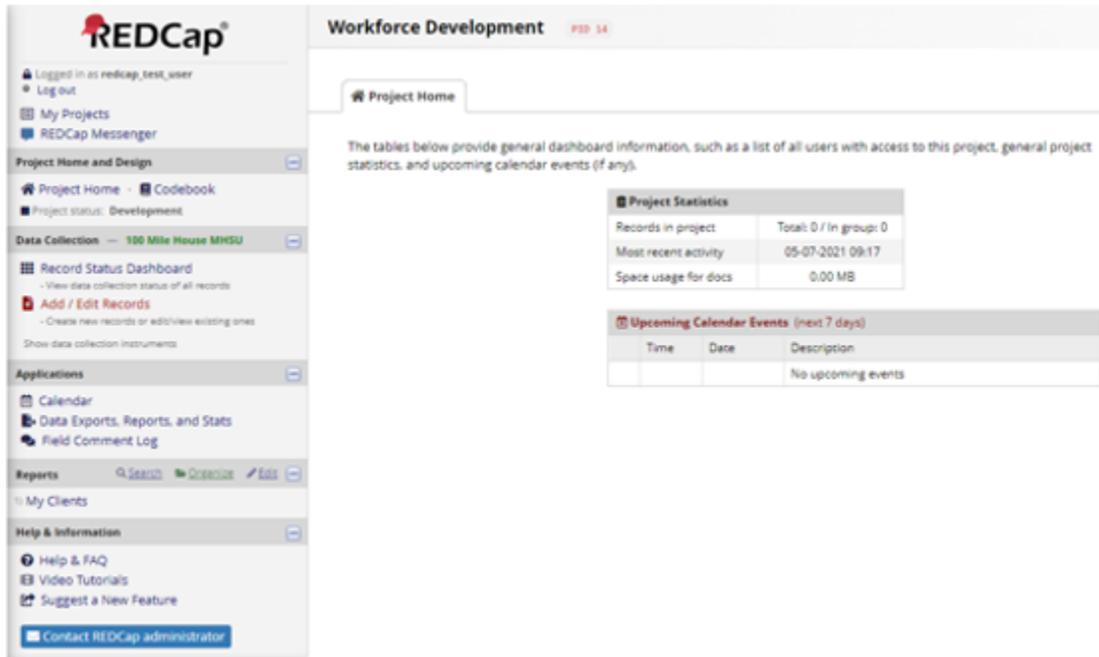
This will bring you to the REDCap home page, pictured below. Click on the link **'My Projects'**.



Click on the link **'Workforce Development'** to get to the **Workforce Development Project Home** page.



You will now be on the **Workforce Development Project Home** page, similar to the image below, and can access your client records and your client list by following the steps outlined in this guide.



## Password Resets

Forgot your password? Click on the **'Forgot your password'** link on the main REDCap log in page, similar to the image below.



**Log In**

Please log in with your user name and password. If you are having trouble logging in, please contact [REDCap Administrator](#).

Username:

Password:

Log In [Forgot your password?](#)

Click here if you forgot your password

You will then see the screen below. Enter your REDCap username and click **‘Verify Username’**.

**REDCap Password Recovery**

You may use this page to reset your REDCap password. You must first provide your REDCap username, and once it is verified as an authentic REDCap account, you will then need to answer a security question that you have previously set for yourself. If you answer the security question correctly, an email will be sent to you containing a link allowing you to reset your password and then log in to your account.

Username:

Type in your user name and Press the "Verify Username" button

REDCap 10.8.3 - © 2021 Vanderbilt University

Next, go to your email inbox. You will receive an email similar to the one below with a link to reset your password. If the email containing the link to reset your password is not in your inbox, check your junk e-mail folder.

[This message was automatically generated by REDCap]

Your REDCap password has been reset for the user "Redcap\_Test\_User". Click the link below to set your new password and log in.

After logging in, please make sure to [set up your password recovery question](#), which will allow you to use the 'Forgot your password?' link on the login page without the need to contact the REDCap Administrator. You will be prompted to set your recovery question on the My Projects page, but you can also set it on your 'My Profile' page under 'Login-related options'.

[Set your new REDCap password](#)

If you have any questions, please contact REDCap Administrator at [IMITPHAnalysts@interiorhealth.ca](mailto:IMITPHAnalysts@interiorhealth.ca).

Click on the link called **‘Set your new REDCap password’**. You will now see the screen below. Enter your new password in the password field, retype your password in the next field and then press **‘Submit’**.

## REDCap® Set Your Password

Your password has not been set yet or has been reset. You will need to set your password here to whatever value you wish. Please enter your desired password below and click the 'Submit' button. Once your password has been set, you may use it with your username whenever you log in to REDCap. Please make sure that you write down or remember your new password for future use. **The new password entered must be AT LEAST 9 CHARACTERS IN LENGTH and must consist of AT LEAST one lower-case letter, one upper-case letter, and one number.**

Username:

Password:

Re-type password:

REDCap 10.8.3 - © 2021 Vanderbilt University

You will be prompted to start the two-step verification process again.

## Navigate REDCap

### Access the Workforce Development Home Page

The REDCap **My Projects** home screen looks similar to the image below. Click on the link **'Workforce Development'** to get to the **Workforce Development Project Home** page.

REDCap® Home My Projects Help & FAQ Training Videos Send-It Messenger Logged in as redcap\_user My Profile Log out

Listed below are the REDCap projects to which you currently have access. Click the project title to open the project. [Read more](#) To review which users still have access to your projects, visit the [User Access Dashboard](#).

Project Title	Records	Fields	Instruments	Type	Status
Workforce Development	0	92	2 forms		

Click on the link "Workforce Development"

REDCap 10.8.3 - © 2021 Vanderbilt University

You will now see the **Workforce Development Project Home** page, similar to the image below. Here you can access your client records and your client list.

**REDCap**  
 Logged in as kore2 | Log out  
 My Projects  
 REDCap Messenger

**Workforce Development** PID 14

Project Home | Project Setup | Other Functionality | Project Revision History

The tables below provide general dashboard information, such as a list of all users with access to this project, general project statistics, and upcoming calendar events (if any).

Project Statistics	
Records in project	1965
Most recent activity	04-21-2022 15:01
Space usage for docs	2.87 MB

Upcoming Calendar Events (next 7 days)		
Time	Date	Description
		No upcoming events

**Applications**

- Alerts & Notifications
- Calendar
- Data Exports, Reports, and Stats
- Data Comparison Tool
- Logging
- Field Comment Log
- File Repository
- User Rights and DAGs
- Data Quality
- External Modules

**Reports**

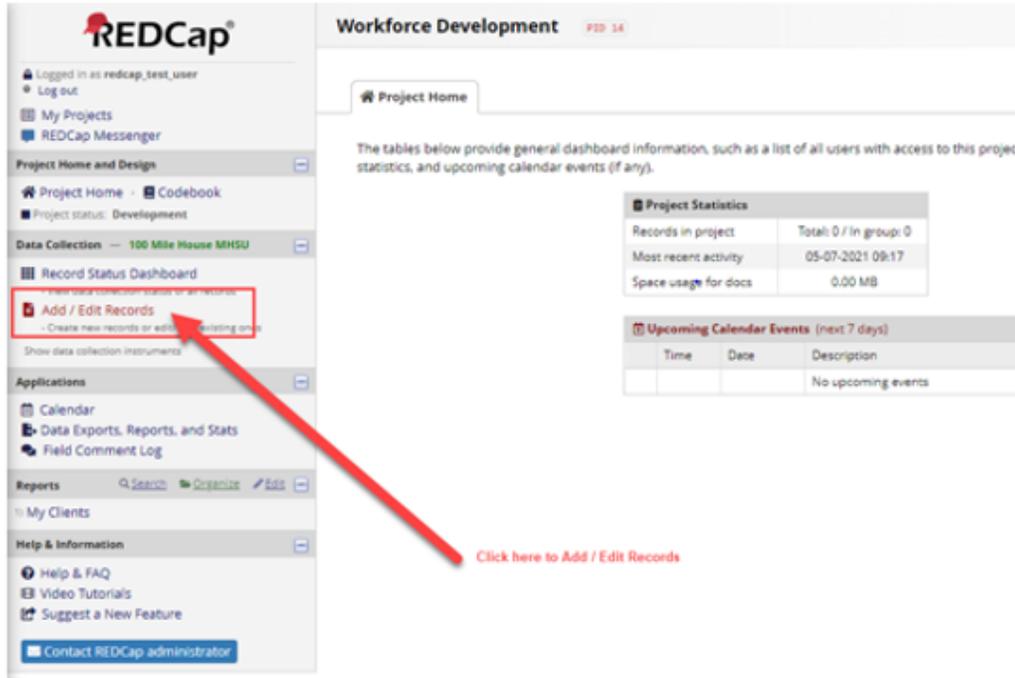
- My Client List
- My Program Client List
- WDA Reporting Program Summary Extract
- WDA Reporting Program Summary Extract (MHSU)
- MoH Data Extract
- test
- test office code
- RECORDS by DAG
- SOS - Supported Employment
- Records by User

**Help & Information**

- Help & FAQ
- Video Tutorials
- Suggest a New Feature
- Contact REDCap administrator

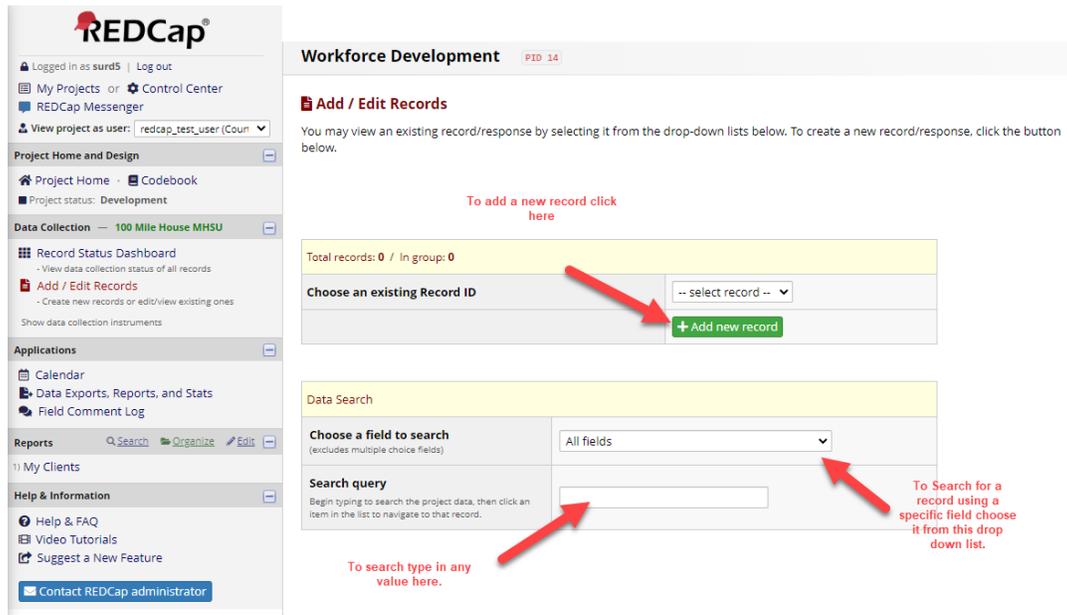
## Create a New Client Record

To create a new client record, click **'Add/Edit Records'** on the left hand side of the **Workforce Development Project Home** page pictured below.



This will take you to the **Workforce Development Add/Edit Records** page pictured below. Create new records and search for existing client records on this page. How to search for an existing client record is outlined later in this guide.

To add a new client record, click on the green 'Add new record' button pictured below.



This will bring you to a new **Participant Information** form page, pictured below. You are now ready to enter client data.

**Participant Information**

Assign record to a Data Access Group? -- select a group --

Adding new Record ID 24

**Record ID** 24

**Staff Information**

**Assigned to User**  
Name of staff working with client.  
Normally the user creating the record, but could be assigned to another staff member within the same organization.  
\* must provide value  
Field is mandatory and cannot be left blank.

**Client Information**

**Social Insurance Number Provided**  
Social Insurance Number provided to service provider.  Yes  No  
\* must provide value reset

**Social Insurance Number**  
Enter the SIN as all numerical digits. Do not include any spaces between the digits.  
This is a correct entry: 123456789. This is an incorrect entry: 123 456 789 or 123-456-789.  
\* must provide value

**Last Name**  
If a client only has one legal name (i.e. Simba), enter their legal name here.  
Use of these special characters is a correct entry: - . Use of other special characters is an incorrect entry, including: ()/.  
\* must provide value  
Field is mandatory and cannot be left blank.

### Data Access Groups

REDCap users are assigned to a Data Access Group (DAG) when they get their REDCap access. DAGs are program specific (i.e. CMHA Kamloops is a DAG, Cranbrook MHSU is a DAG). Only the staff assigned to a DAG can see the client records created for that DAG; staff in one DAG cannot see client information entered by staff in another DAG.

The DAG is displayed at the top of the Participant Information form, circled below.

**Workforce Development - Test** PID 39

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

**Participant Information**

Assign record to a Data Access Group? **Kamloops MHSU**

Adding new Record ID 14

**Record ID** 14

**Staff Information**

**Assigned to User**

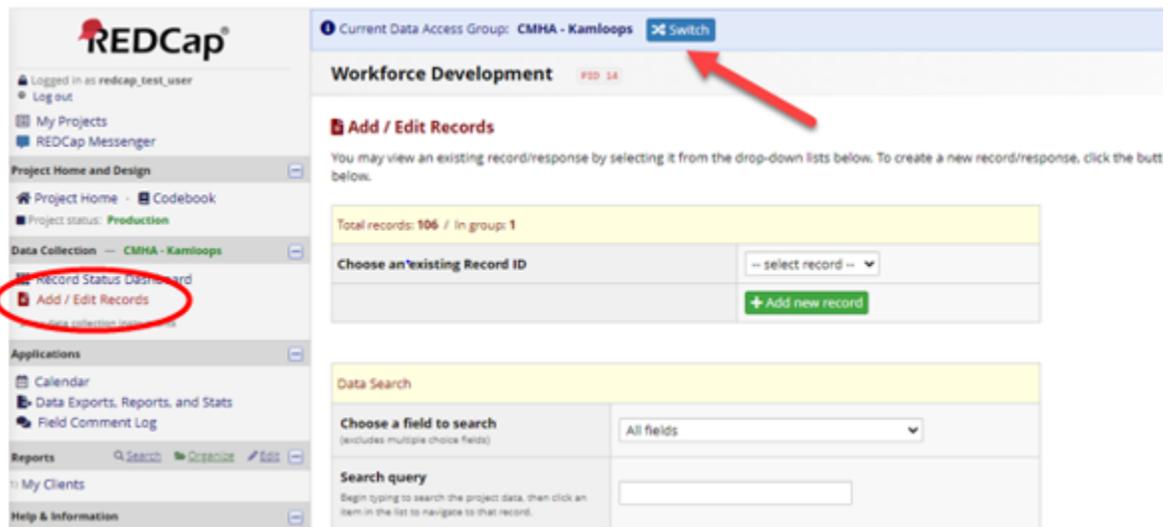
## Switch between Data Access Groups in REDCap

Some MHSU staff provide WDA services to clients in MHSU programs in two different towns. These staff are assigned to two DAGs, one for each of the programs they see clients for, so they can create client records under the correct program. If you provide client services under one program only (e.g. Kamloops MHSU or Kelowna MHSU) this switching DAGs section does not apply to you.

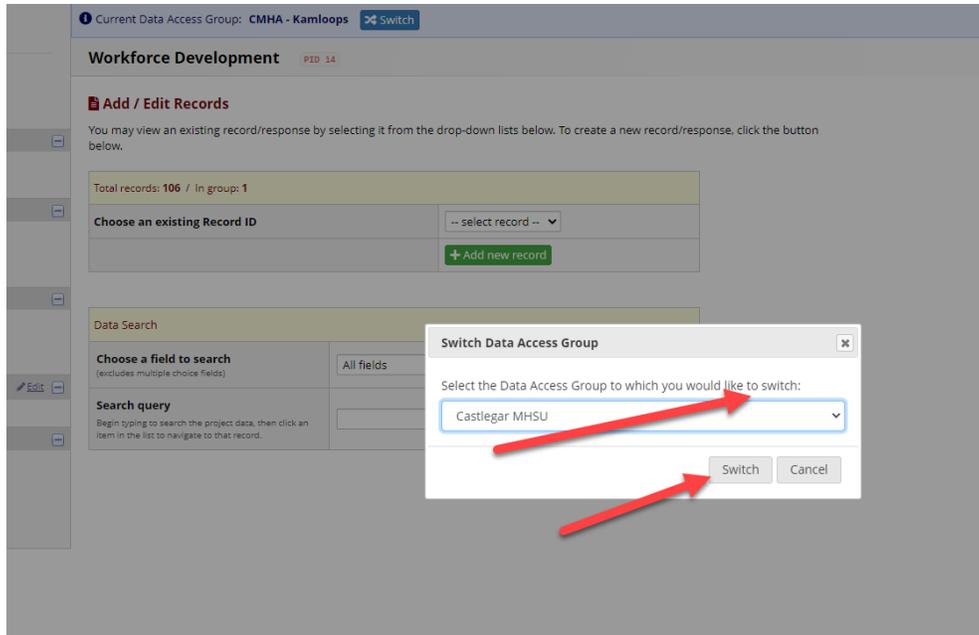
Confirm what DAG you are in before you create a new client record. You cannot switch DAGs from the **Participant Information** form page. Click '**Add/Edit Records**' on the left hand navigation pane, circled below.

You will see a blue banner at the top of the **Workforce Development Add/Edit Records** page, pictured below. Click the '**Switch**' button.

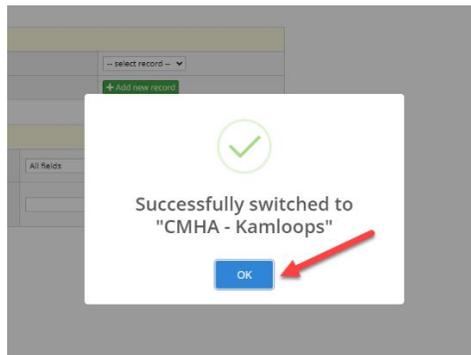
If you cannot see the blue banner showing the DAG you are currently in, it means you do not have access to more than one DAG.



You will now see the pop up pictured below. Select the DAG you want to create a new record under from the drop down menu and click '**Switch**'. Only the DAGs you have access to will be visible.



You should see the confirmation image below confirming what DAG you successfully switched to. Click 'OK'. You can now create new client records under that DAG.



### Complete the Participant Information Form

The Participant Information form is now broken down into six sections:

1. Staff Information
2. Client Information
3. Address Information
4. Action Plan Information
5. **UPDATED:** Intervention Information
6. Form Status and Saving your work

## Staff Information

The new **Assigned to User** field identifies the REDCap user providing WDA services to the client and/or who is responsible for maintaining the client record. Select your IH mnemonic (IH staff only) or work email address (contracted service providers only) from the drop-down menu pictured below. **This field must be completed.**

The screenshot shows a form section titled "Staff Information" with a sub-section "Assigned to User". The text describes the field as the "Name of staff working with client" and notes that it is normally the user creating the record but can be assigned to another staff member. A red asterisk indicates it is mandatory. A red arrow points to the drop-down menu.

The drop-down menu is prepopulated according to the DAG the REDCap user is assigned to.

**Example:** Your program and DAG is CMHA Kamloops. Users listed in the drop down menu are those assigned to the CMHA Kamloops DAG.

## Client Information

Enter Client Information as requested in the Participant Information form fields pictured below.

**Note:** The Client Information section of the Participant Information form now contains hidden, conditional fields that are not visible until other fields are completed. Read and follow the instructions and correct entry format examples on the Participant Information form in REDCap as these instructions have changed. Any client records containing errors cannot be submitted for mandatory provincial and federal reporting.

**Client Information**

- 1

**Social Insurance Number Provided**

Social Insurance Number provided to service provider.  Yes  
 No

\* must provide value reset
- 2

**Social Insurance Number**

Enter the SIN as all numerical digits. Do not include any spaces between the digits.

**This is a correct entry: 123456789. This is an incorrect entry: 123 456 789 or 123-456-789.**

\* must provide value
- 3

**Last Name**

If a client only has one legal name (i.e. Simba), enter their legal name here.

**Use of these special characters is a correct entry: - '. Use of other special characters is an incorrect entry, including: ()/.**

\* must provide value

Field is mandatory and cannot be left blank.
- 4

**First Name**

Leave this field blank, if client has only one legal name (i.e. Simba).

**Use of these special characters is a correct entry: - '. Use of other special characters is an incorrect entry, including: ()/.**

\* must provide value

Field is mandatory and cannot be left blank, unless client has only one legal name.
- 5

**Date of Birth**

Valid Date of Birth range for clients is greater than 16 and less than 100 years old.

**Correct format entry: YYYY-MM-DD. Click on the calendar icon. Select year and month before selecting day.**

\* must provide value

Y-M-D

Field is mandatory and cannot be left blank.
- 6

**Email Address**

Leave blank if client does not have an email address.

An explanation of the fields pictured above are provided here. See the Reference Sheet for Correcting REDCap Errors on the [MHSU Psychosocial Rehabilitation Toolkit](#) (IH MHSU) and the [WDA & REDCap Resource Sheet](#) (contracted service providers) for more information.

- |   |  |
|---|--|
| <p><b>1 NEW: Social Insurance Number Provided</b><br/>(Mandatory)</p> | <p>Client’s Social Insurance Number shared with provider.</p> <ul style="list-style-type: none"> <li>Must be completed.</li> <li>Select the ‘Yes’ radio button if the client is willing to provide their SIN for reporting purposes.</li> <li>Select the ‘No’ radio button if the client is not willing to provide their SIN.</li> <li>No longer need to enter default value if client chooses not to report or if client doesn’t have a SIN.</li> </ul> |
|---|--|

- |   |  |
|---|--|
| <b>2 Social Insurance Number</b><br>(Conditional) | Client's Social Insurance Number. <ul style="list-style-type: none"> <li>• Must be completed if 'Yes' is selected for <b>Social Insurance Number Provided</b>.</li> <li>• Field will be hidden if 'No' is selected for <b>Social Insurance Number Provided</b>.</li> <li>• Correct format: 9 numeric digits only, no spaces.</li> <li>• Correct entry: 123456789</li> <li>• Incorrect entries: 123 456 789 or 123-456-789 or 999999999123456789</li> </ul>                                       |
| <b>3 Last Name</b><br>(Mandatory)                 | Client's legal last name. <ul style="list-style-type: none"> <li>• Must be completed.</li> <li>• If client has only one legal name (i.e. Simba), enter single legal name in the <b>Last Name</b> field.</li> <li>• Correct format: Alphabetical characters plus special characters below in green.</li> <li>• Correct special characters: – ‘</li> <li>• Correct entries: Jones-Smith, O'Reilly</li> <li>• Incorrect special characters: (),</li> <li>• Incorrect entry: Robert (Bob)</li> </ul> |
| <b>4 First Name</b><br>(Mandatory)                | Client's legal first name. <ul style="list-style-type: none"> <li>• Must be completed.</li> <li>• Leave this field blank if client has only one legal name (i.e. Simba)</li> <li>• Enter single legal name in <b>Last Name</b> field if applicable.</li> <li>• No longer need to enter default value if client has one legal name.</li> </ul>  |
| <b>5 Date of Birth</b><br>(Mandatory)             | Client's date of birth. <ul style="list-style-type: none"> <li>• Must be completed.</li> <li>• Correct format: YYYY-MM-DD</li> <li>• Click on the calendar icon and select year and month before selecting day.</li> <li>• Clients must be over 16 and under 100 years of age.</li> </ul>  |
| <b>6 Email Address</b><br>(Optional)              | Client's email address. <ul style="list-style-type: none"> <li>• Leave blank if client does not have an email address or chooses not to report.</li> <li>• Incorrect entry: No email address or N/A or None or No email</li> </ul>   |

An explanation of the fields pictured above are provided here. See the Reference Sheet for Correcting REDCap Errors on the [MHSU Psychosocial Rehabilitation Toolkit](#) (IH MHSU) and the [WDA & REDCap Resource Sheet](#) (contracted service providers) for more information.

- 7 NEW: Phone Provided**  
(Mandatory)

  - Client’s phone number shared with provider.
  - Must be completed.
  - Select the ‘Yes’ radio button if the client is willing to provide their phone number for reporting purposes.
  - Select the ‘No’ radio button if the client is not willing to provide their phone number.
  - No longer need to enter default value for prefer not to report or if client doesn’t have a phone.
  
- 8 Phone Number**  
(Conditional)

  - Client’s 10-digit phone number and area code.
  - Required if ‘Yes’ is selected for **Phone Provided**.
  - Field will be hidden if ‘No’ is selected for **Phone Provided**.

- Correct format: 10 numeric digits only, no spaces.
  - Area code must be in Canada.
  - Correct entry: 1235551234
  - Incorrect entries: 123-555-1234 or (123) 555-1234 or 1235551234No Telephone
- 9 Education Level**  
(Mandatory)
- Select the highest level of education completed by the client prior to participating in the service from the drop-down menu.
- Must be completed.
  - Must complete **Education Level Comment** field ONLY if 'Other' option is selected in this field.
- 10 Education Level Comment**  
(Conditional)
- Provide a description of the client's Education Level here if it does not fit the identified categories under **Education Level** above.
- Field will appear only if 'Other' is selected for **Education Level**.
  - Must be completed if 'Other' is selected for **Education Level**.
  - 150 character limit.
  - Correct format: Alphabetical and numeric digits only.
- 11 Client's Gender**  
(Mandatory)
- Select 'Male', 'Female', 'Other' or 'Prefer not to report' from the drop-down menu.
- Must be completed.
  - Gender option 'Unspecified' replaced with 'Other'.
  - 'Other' should be used when a client identifies as other or not in agreement that there are just two genders and who exist outside of the gender binary.
  - **NOTE:** The Ministry of Health's reporting system is not built to accept additional gender options.
- 12 Marital Status**  
(Mandatory)
- Select 'Married or equivalent', 'Single' or 'Prefer not to report' from the drop-down menu.
- Must be completed.
  - Married or equivalent refers to a person who is married and has not separated or obtained a divorce, and whose spouse is still living or a person who is living in a common-law relationship with another person but who is not legally married that person.
  - Single refers to a person who has never been married, a married person who is no longer living with their spouse (separated) and has not remarried, a person who has obtained a legal divorce and has not remarried, and a person who has been widowed and has not remarried.

**13 Number of Dependents**  
Indicate the number of dependents for whom the client provides care for.  
**Dependents** - A dependent is defined as an individual who lives in the same household as the client and for whom they have caregiving responsibilities. The dependent may be a child by birth, marriage, or adoption, may be a foster child, or is an adult dependent (e.g. an adult offspring with a disability).  
\* must provide value  
Greater than 10  
Field is mandatory and cannot be left blank.

**14 Number of dependents, if greater than 10**  
\* must provide value

**15 Language Spoken**  
The client's official language of choice or the language in which they interacted with service providers.  
\* must provide value  
Field is mandatory and cannot be left blank.

**16 Person with a Disability**  
A disability can be self identified and/or diagnosed by a health care professional.  
\* must provide value  
Field is mandatory and cannot be left blank.

**17 Indigenous Identity**  
Refers to whether a person reports as being an Indigenous person, that is, First Nations (North American Indian), Metis, or Inuk (Inuit) and/or reports as being a Registered or Treaty Indian (that is to say, that they are registered under the Indian Act of Canada) and/or a member of a First Nation or Indian Band.  
\* must provide value  
Field is mandatory and cannot be left blank.

An explanation of the fields pictured above are provided here. See the Reference Sheet for Correcting REDCap Errors on the [MHSU Psychosocial Rehabilitation Toolkit](#) (IH MHSU) and the [WDA & REDCap Resource Sheet](#) (contracted service providers) for more information.

- 13 Number of Dependents (Mandatory)**
- Select the number of client’s dependents from the drop-down menu.
  - Must be completed.
  - A dependent is defined as an individual who lives in the same household as the client and for whom the client has caregiving responsibilities. The dependent may be a child by birth, marriage, adoption, a foster child, or an adult dependent (e.g. an adult offspring with a disability).
  - Select ‘0’ from the drop-down menu if no dependents.
  - If greater than 10 dependents, select ‘Greater than 10’ and enter number of dependents in the **Number of dependents, if greater than 10** field that appears.
  - If client chooses not to report select ‘Prefer not to report’ from drop-down menu.

- No longer need to enter default value if client chooses not to report.
- 14 NEW: Number of dependents, if greater than 10**  
(Conditional)
- Must be completed if 'Greater than 10' is selected for **Number of Dependents** as pictured in the sample image above.
  - Field is hidden unless 'Greater than 10' is selected.
  - Required if 'Greater than 10' is selected for **Number of Dependents**.
  - Correct format: Numeric digits only
  - Correct entry: 11
  - Incorrect entry: eleven
- 15 Language Spoken**  
(Mandatory)
- Select 'English only', 'French only', 'English and French' or 'Not a federal official language' from the drop-down menu.
- Must be completed.
- 16 Person with a Disability**  
(Mandatory)
- Select 'Yes', 'No' or 'Prefer not to report' from the drop-down menu.
- Must be completed.
  - A disability can be self-identified and/or diagnosed by a health care professional.
- 17 Indigenous Identity**  
(Mandatory)
- Select 'Yes', 'No' or 'Prefer not to report' from the drop-down menu.
- Must be completed.
  - Indigenous identity refers to whether a person identifies themselves as Indigenous, that is, First Nations (North American Indian), Métis, or Inuk (Inuit) and/or as a Registered or Treaty Indian (that is, registered under the Indian Act of Canada) and/or being a member of a First Nation or Indian band.

**18 Immigrant Status**  
An immigrant refers to a person who is or has been a landed immigrant/permanent resident. This person has been granted the right to live in Canada permanently by immigration authorities.  
\* must provide value  
Yes  
Field is mandatory and cannot be left blank.

**19 Provide Immigration Year**  
Client is comfortable providing immigration year to service provider.  
\* must provide value  
 Yes  
 No  
reset

**20 Immigration Year**  
This field must be completed if "Yes" is selected for a client's Immigrant Status, and applicant is comfortable providing to service provider.  
**This is a correct entry: 1994. These are incorrect entries: '94 or 94.**  
\* must provide value

**21 Visible Minority Status**  
The Employment Equity Act defines visible minorities as "persons, other than Indigenous peoples, who are non-Caucasian in race or non-white in colour". Indigenous persons are not included in this category.  
\* must provide value  
Field is mandatory and cannot be left blank.

An explanation of the fields pictured above are provided here. See the Reference Sheet for Correcting REDCap Errors on the [MHSU Psychosocial Rehabilitation Toolkit](#) (IH MHSU) and the [WDA & REDCap Resource Sheet](#) (contracted service providers) for more information.

- 18 Immigrant Status** (Mandatory)
  - Select 'Yes', 'No' or 'Prefer not to report' from the drop-down menu.
  - Must be completed.
  - Immigrant status refers to a person who is a landed immigrant/permanent resident. The Employment Equity Act defines visible minorities as "persons, other than Indigenous peoples, who are non-Caucasian in race or non-white in colour".
  
- 19 NEW: Provide Immigration Year** (Conditional)
  - Client's immigration year shared with provider.
  - Must be completed.
  - Select the 'Yes' radio button if the client is willing to provide their immigration year for reporting purposes.
  - Select the 'No' radio button if the client is not willing to provide their immigration year.
  - No longer need to enter default value if client chooses not to report.
  - if 'No' is selected, **Immigration Year** field will disappear because it does not need to be completed
  
- 20 Immigration Year** (Conditional)
  - Client's Immigration Year

- Must be completed if 'Yes' is selected for **Provide Immigration Year**.
- Field is hidden if 'No' is selected for **Provide immigration Year**.
- Include **year** only - **do not include day or month of immigration**
- Correct format: 4 numeric digits only.
- Correct entry: **1994**
- Incorrect entries: **94** or **'94**

- 21 Visible Minority Status**  
(Mandatory)
- Select 'Yes', 'No' or 'Prefer not to report' from the drop-down menu.
- Must be completed.
  - Visible minority status is defined as “persons, other than Indigenous peoples, who are non-Caucasian in race or non-white in colour.” Indigenous persons are not included in this category.

### Client Address Information

Enter client Address Information as requested in the Participant Information form fields pictured below.

**Note:** The Address Information section of the Participant Information form now contains hidden, conditional fields that are not visible until other fields are completed. Read and follow the instructions and correct entry format examples on the Participant Information form in REDCap as these instructions have changed. Any client records containing errors cannot be submitted for mandatory provincial and federal reporting.

An explanation of the fields pictured above are provided here. See the Reference Sheet for Correcting REDCap Errors on the [MHSU Psychosocial Rehabilitation Toolkit](#) (IH MHSU) and the [WDA & REDCap Resource Sheet](#) (contracted service providers) for more information.

**22 Address Provided**  
(Mandatory)

- Client’s address shared with provider.
- Must be completed.
  - Select the ‘Yes’ radio button if the client is willing to provide their address for reporting purposes.
  - Select the ‘No’ radio button if the client is not willing to provide their address OR if a client does not have a fixed address.
  - No longer need to enter default value if client chooses not to report.
  - Option to select ‘Service Office Address’ if client does not have an address and would like to report the service office address.

- If 'No' is selected, a warning pop-up will appear because province field is auto populated on form. Select 'OK' to continue with form.
  - If 'No' is selected the **Street Address, Province** and **Postal Code** fields will be hidden on the form because they do not need to be completed.
- 23 Street Address**  
(Conditional)
- Client's street address only.
  - Must be completed if 'Yes' is selected for **Address Provided**.
  - Field will be hidden if 'No' is selected for **Address Provided**.
  - **Street address** only - **do not include Town/City, Province or Postal Code**.
  - Street address format must meet Canada Post guidelines:
    - [Canada Post Address Guidelines – Canadian Addresses](#)
    - [Canada Post Address Guidelines – Symbols & Abbreviations](#)
  - 150 character limit.
  - Correct format: Alphanumeric characters only plus special characters below in green.
  - Correct special characters with no spaces: -
  - Incorrect special characters: **#,;**
  - Correct entries: **7-22 Eddy ST N; B-528 Wentworth RD**
  - Incorrect entries: **#7 – Eddy St. North; B – 528 Wentworth Road**
  - Post office or PO box information can be entered in the **Street Address** field if a client prefers to report a PO box instead of their street address.
- 24 Town/City**  
(Mandatory)
- Select the client's town or city here.
- Must be completed even if 'No' is selected for **Address Provided**.
  - Select the **Town/City** of the service office if client prefers not to report their address or does not have a fixed address.
- 25 Province**  
(Mandatory)
- Province must be British Columbia.
- British Columbia is auto populated on form.
  - Must be completed if 'Yes' is selected for **Address Provided**.
  - Field will be hidden if 'No' is selected for **Address Provided** and populated in the background.
  - Use service office address if client's address is not in BC.
- 26 Postal Code**  
(Conditional)
- Client's postal code.
- Must be completed if 'Yes' is selected for **Address Provided**.
  - Field will be hidden if 'No' is selected for **Address Provided**.

- Correct format: Alphanumeric characters only, no spaces between characters, alphabetical characters must be capitalized, no special characters or symbols.
- Postal code must begin with letter 'V'.
- Correct entry: **V1A0B1**
- Incorrect entries: **V1A 0B1** or **v1a0b1** or **V!S!X1** or **No Postal CodeV1A0B1**

## Action Plan Information

Enter Action Plan Information as requested in the Participant Information form fields pictured below.

**Note:** The Action Plan Information section of the Participant Information form contains hidden, conditional fields that are not visible until other fields are completed. Read and follow the instructions and correct entry format examples on the Participant Information form in REDCap as these instructions have changed. Any client records containing errors cannot be submitted for mandatory provincial and federal reporting.

**Action Plan Information**

An action plan is typically developed by the service provider and the client to outline a series of activities or programs/services a client will complete in order to achieve a specific employment-related goal.

**27** **Provincial Office Code**  
\* must provide value   
Field is mandatory and cannot be left blank.

**28** **Action Plan Previous Employment**  
Represents the client's employment status prior to participation in program.

- **Unemployed:** This category includes those who (a) are on temporary layoff with an expectation of recall and are available for work, or (b) are without work, have actively looked for work in the past four weeks, and are available for work, or (c) have a new job to start within four weeks from reference week, and are available for work. Participants on work experience who are unpaid or receiving a non-wage support are considered unemployed.
- **Employed:** Employed persons are those who work at a job or business, who have paid work in the context of an employer-employee relationship (not including self-employment). This includes those who have a job, but are not at work due to factors such as own illness or disability, personal or family responsibilities, vacation, labour dispute or other reasons. This category does not include persons on layoff, between casual jobs, or with a job to start at a future date. Employment may be permanent or temporary (work under a fixed-term contract, in contrast to permanent work where there is no end-date), full-time or part-time.
- **Self-Employed:** Self-employed persons are working owners of an incorporated or unincorporated business, farm or professional practice, with or without paid help. The "unincorporated" group includes self-employed workers who do not own a business (such as babysitters and newspaper carriers). Self-employed workers include unpaid family workers, i.e. persons who work without pay on a farm or in a business or professional practice owned and operated by another family member living in the same dwelling.
- **Not in the labour force:** Persons not in the labour force are those who, prior to the intervention, were unwilling or unable to work - that is, they were neither employed nor unemployed. This category also includes discouraged workers, who want to work but are not currently looking for work because they believe no suitable work is available.

\* must provide value  
  
Field is mandatory and cannot be left blank.

**29** **Action Plan Precarious Employment**  
Precarious employment is defined as the individual's perception that their employment is unstable or does not satisfy their employment goals (e.g. holding multiple jobs, contract work, insufficient hours, work below their qualifications, etc.). For all those individuals who identify as being employed above, report "Yes", "No" or "Prefer not to Report".

Field is mandatory and cannot be left blank.

An explanation of the fields pictured above are provided here. See the Reference Sheet for Correcting REDCap Errors on the [MHSU Psychosocial Rehabilitation](#)

[Toolkit](#) (IH MHSU) and the [WDA & REDCap Resource Sheet](#) (contracted service providers) for more information.

- 27 Provincial Office Code**  
(Mandatory)
- This field contains a drop down menu of all IH MHSU and IH contracted services providing pre-employment supports, supported employment and supported education services to clients under the WDA.
- Must be completed.
  - Select your program name and location here.
- 28 Action Plan Previous Employment**  
(Mandatory)
- (Previously called Employment Status Prior to Intervention)
- Select 'Unemployed', 'Employed', 'Self-Employed' or 'Not in the labour force' from the drop-down menu.
- Must be completed.
  - Action Plan Previous Employment refers to a client's employment status prior to starting their action plan and intervention with you.
- 29 Action Plan Precarious Employment**  
(Optional)
- Optional data point. If client chooses to report, select 'Yes', 'No' or 'Prefer not to report' from the drop-down menu.
- Field appears only if 'Unemployed', 'Employed' or 'Self-Employed' are selected for **Action Plan Previous Employment**.
  - Field remains hidden if 'Not in the labour force' is selected because not applicable.

**30 Action Plan Start Date**  
 Represents the start date of the action plan. An action plan is typically developed by the service provider and the client to outline a series of activities or programs/services a client will complete in order to achieve a specific employment-related goal.  
 Must not be a future date.  
**Correct format entry: YYYY-MM-DD. Click on the calendar icon. Select year and month before selecting day.**  
 \* must provide value  
  Today Y-M-D  
 Field is mandatory and cannot be left blank.

**31 Action Plan End Date**  
 This is the end date of the action plan and must be provided once the action plan has ended.  
 Must not be a future date. Date must be after the Action Plan Start Date. Until the action plan is ended, this entry must be left blank.  
**Correct format entry: YYYY-MM-DD. Click on the calendar icon. Select year and month before selecting day.**  
  Today Y-M-D

**32 Action Plan Result Date**  
 This is the date when the final outcome of the Action Plan or Intervention was reached. This field must have a value in order to start another action plan.  
 Must not be a future date. Until the action plan is ended and the result date is known, this entry must be left blank.  
**Correct format entry: YYYY-MM-DD. Click on the calendar icon. Select year and month before selecting day.**  
  Today Y-M-D

**33 Action Plan Result Code**  
 Represents the result achieved by the client at the end of the action plan.  
 Must be completed once the action plan is ended and the result date is known. Until then, entry must be left blank.

An explanation of the fields pictured above are provided here. See the Reference Sheet for Correcting REDCap Errors on the [MHSU Psychosocial Rehabilitation Toolkit](#) (IH MHSU) and the [WDA & REDCap Resource Sheet](#) (contracted service providers) for more information.

- 30 Action Plan Start Date** (Mandatory)
- Select the date the action plan begins by clicking on the calendar icon.
  - Must be completed.
  - Cannot be a future date.
  - **Action Plan Start Date** must be on or before **Intervention Start Date**.
  - Correct format: **YYYY-MM-DD**
  - Click on the calendar icon and **select year and month before selecting day**.
  - **Note:** Use April 1, 2021 as the start date for any clients who were already accessing services as of April 1, 2021. This is because this is the date the updated WDA reporting requirements came into effect. Use the actual start date for any new clients after April 1.

- 31 Action Plan End Date**  
(Conditional)
- Select the date the action plan ends by clicking on the calendar icon.
- Leave blank until Action Plan has ended.
  - Cannot be a future date.
  - Field is hidden until an **Action Plan Start Date** is entered.
  - Must be completed once the Action Plan has ended.
  - **Action Plan End Date** must be after **Action Plan Start Date**.
  - Correct format: **YYYY-MM-DD**
  - Click on the calendar icon and **select year and month before selecting day**.
- 32 Action Plan Result Date**  
(Conditional)
- Select the action plan result date by clicking on the calendar icon.
- Leave blank until the **Action Plan End Date** and final outcome of the Action Plan or Intervention is reached and entered
  - Must be completed once the final outcome of the Action Plan or Intervention is reached and entered.
  - Field is hidden until an **Action Plan End Date** is entered.
  - Cannot be a future date.
  - **Action Plan Result Date** must be on or after the **Intervention End Date**.
  - Correct format: **YYYY-MM-DD**
  - Click on the calendar icon and **select year and month before selecting day**.
- 33 Action Plan Result Code**  
(Conditional)
- Select 'Unemployed but available for work', 'Employed', 'Self-Employed', 'Returned to school', 'Unspecified', 'Not in the labour force' or 'Starting a new action plan' from the drop-down menu.
- (Previously called Action Plan Outcome)
- Must be completed once the Action Plan has ended and the **Action Plan End Date** and **Action Plan Result Date** are reached and entered.
  - Leave blank until **Action Plan End Date** and **Action Plan Result Date** are reached and entered.
  - Field is hidden until an **Action Plan Result Date** is entered.
  - Use 'Unspecified' if the client is no longer participating in the Action Plan and cannot be contacted to determine an outcome.
  - Use 'Starting a New Action Plan' if the client has achieved a goal related to employability or education but is

still not ready for labour market participation and is moving on to a new goal/new Action Plan.

- Use 'Unspecified' if a client passes away before completing an Action Plan.

### Intervention Information

Enter Intervention Information as requested in the Participant Information form fields pictured below.

**Note:** The Intervention Information section of the Participant Information form contains hidden, conditional fields that are not visible until other fields are completed. Read and follow the instructions and correct entry format examples on the Participant Information form in REDCap as these instructions have changed. Any client records containing errors cannot be submitted for mandatory provincial and federal reporting.

An explanation of the field pictured above is provided here. See the Reference Sheet for Correcting REDCap Errors on the [MHSU Psychosocial Rehabilitation Toolkit](#) (IH MHSU) and the [WDA & REDCap Resource Sheet](#) (contracted service providers) for more information.

- 34 Intervention Title** (Mandatory)
- Intervention Title refers to the 3 WDA program categories.
- Select one of the three options from the drop-down menu that best describes the service you are providing: 'Pre-Employment Support Services', 'Supported Employment Services' or 'Supported Education Services'.
  - Must be completed.

Once the Intervention Title is selected, the Intervention Code options will appear as pictured below. Supported Education Services is pictured as an example only.

**Intervention Information**

The intervention is the program/service(s) that a client participates in or receives. An action plan must have at least one (1) intervention.

**Intervention Title**  
\* must provide value

Supported Education Services ▼  
Field is mandatory and cannot be left blank.

**Intervention Code**  
\* must provide value

- 111 - Job Search Assistance
- 112 - Counselling / Coaching
- 113 - Unassisted Services
- 114 - Other - Employment Assistance Services
- 211 - Occupational Skills Training
- 212 - Short-Term Training
- 213 - Skills Development-Literacy, Essential Skills, Language Training and Adult Basic Education
- 214 - Apprenticeship
- 215 - Other - Skills Development
- 222 - Job Creation Partnership
- 223 - Self-Employment Assistance

**36 Intervention Related National Occupational Classification (NOC)**

Intervention Related NOC Code is mandatory when Intervention Code 211 is selected.  
4 digit NOC code must be entered.

[Government of Canada: National Occupational Classification Code Search](#)

(Only the 2016 codes can be used, for now.)

Must be completed if Intervention Code 211 is selected

**37 NOC Version**

Must be completed if Intervention Code 211 is selected.

An explanation of the fields pictured above are provided here. See the Reference Sheet for Correcting REDCap Errors on the [MHSU Psychosocial Rehabilitation Toolkit](#) (IH MHSU) and the [WDA & REDCap Resource Sheet](#) (contracted service providers) for more information.

- 35 Intervention Code (Mandatory)**

Intervention Codes refer to the type of service(s) the client is participating in.

  - Must be completed.
  - All Intervention Codes are listed under each of the three Intervention Titles.
  - Select the Intervention Code(s) that applies. If the service includes more than one of the Intervention Codes pictured above below, select all that apply.
  - **UPDATE:** Codes 221, 224 and 311, which were previously present on this list, have been removed. Records which previously used these codes will now generate an error until a new code is selected.
  - See Appendix B of this guide for Intervention Code definitions.
- 36 Intervention Related**

The NOC is the national reference on occupations for collecting, analyzing and disseminating occupational data for

**National Occupation Classification (Conditional)**

- labour market information and employment-related program administration.
- Must be completed if **Intervention Code** '211 – Occupational Skills Training' is selected as pictured in the sample screenshot above.
  - Field is hidden unless '211' is selected.
  - Correct format: Numeric digits only.
  - Look up the NOC Code on the [Government of Canada: National Occupational Classification Code Search](#) website.
  - Include any leading zeros (0) given by the code (i.e. 0023).
  - Correct numeric entry example: 6321
  - Incorrect alphabetical entry example: Chef
  - **UPDATE:** Please use version 2016 codes.

**37 NOC Version (Conditional)**

- Must be completed if **Intervention Code** '211-Occupational Skills Training' is selected.
- Field is hidden unless '211' is selected.
  - Select the NOC version from the drop-down menu.
  - Current version linked above is 2016.3.
  - **UPDATE:** Please use version 2016 codes. Options to select version 2006 and 2011 have been removed from the drop-down list.
  - **NEW:** 'Unknown' drop-down option has been made available.

**38 Intervention Start Date**

Represents the start date of the intervention. An action plan must have at least one (1) intervention.  
Must not be a future date. Intervention Start Date must be on or after the Action Plan Start Date.

**Correct format entry: YYYY-MM-DD. Click on the calendar icon. Select year and month before selecting day.**

\* must provide value

Today

Y-M-D

**39 Intervention End Date**

Represents the end date of the intervention. An action plan must have at least one (1) intervention.  
Must not be future date. Until intervention is ended, this entry must be left blank. Intervention End Date must be less than 60 months (5 years) after the Intervention Start Date.

**Correct format entry: YYYY-MM-DD. Click on the calendar icon. Select year and month before selecting day.**

Today

Y-M-D

**40 Intervention Outcome**

A code representing the outcome of the intervention.  
Must be completed once Intervention End Date is entered.

▼

An explanation of the fields pictured above are provided here. See the Reference Sheet for Correcting REDCap Errors on the [MHSU Psychosocial Rehabilitation Toolkit](#) (IH MHSU) and the [WDA & REDCap Resource Sheet](#) (contracted service providers) for more information.

- 38 Intervention Start Date**  
(Mandatory)
- Select the date the intervention begins by clicking on the calendar icon.
- Must be completed.
  - Cannot be a future date.
  - Field is hidden until an **Action Plan Start Date** is entered because the **Action Plan Start Date** must be on or before the **Intervention Start Date**
  - If you do not see the **Intervention Start Date** field, it means you need to enter an **Action Plan Start Date** on the form
  - Must be before **Intervention End Date**.
  - Correct format: **YYYY-MM-DD**
  - Click on the calendar icon and **select year and month before selecting day**.
- 39 Intervention End Date**  
(Conditional)
- Select the date the intervention ends by clicking on the calendar icon.
- Must be completed once the **Action Plan Result Date** is reached and entered.
  - Field is hidden until an **Intervention Start Date** is entered.
  - Leave blank until **Action Plan Result Date** is reached and intervention has ended.
  - Cannot be a future date.
  - Must be on or after **Intervention Start Date**.
  - Must be less than 60 months or 5 years after the Intervention Start Date.
  - Correct format: **YYYY-MM-DD**
  - Click on the calendar icon and **select year and month before selecting day**.
- 40 Intervention Outcome**  
(Conditional)
- Select 'Complete', 'Incomplete', 'Failed to Report', 'Cancelled' or 'Rescheduled' from the drop-down menu.
- Must be completed once the **Intervention End Date** is reached and entered.
  - Leave blank until **Action Plan Result Date** and **Intervention End Date** is reached and entered.
  - Field is hidden until **Intervention End Date** is entered.
  - Use 'Cancelled' if a client passes away before completing an Action Plan.

**41 Intervention Language of Service**  
 Represents the federal official language of the intervention in which the client participated (i.e. the language in which skills training was delivered).  
 \* must provide value  
 [Dropdown menu]  
 Field is mandatory and cannot be left blank.

**42 Intervention Essential Skills**  
*This question appears only after the Intervention End Date has been entered, and the Intervention Code selected is 213 - Literacy, Essential Skills, Language Training and Adult Basic Education.*  
 Represents whether the client demonstrated an increase in literacy or one of the other essential skills (numeracy, document use, writing, oral communication, thinking, digital technology/skills, working with others, continuous learning) following participation in a Literacy, Essential Skills, Language Training and Adult Basic Education intervention.  
 \* must provide value  
 [Dropdown menu]  
 Must be completed if Intervention End Date is entered, and Intervention Code 213 is selected.

**43 Intervention Credential**  
*This question appears only after the Intervention End Date has been entered.*  
 Represents whether or not the client earned a nationally or provincially/territorially recognized credential/certificate following participation in an intervention.  
 Must be completed once the Intervention End Date is reached and entered.  
 [Dropdown menu]

An explanation of the fields pictured above are provided here. See the Reference Sheet for Correcting REDCap Errors on the [MHSU Psychosocial Rehabilitation Toolkit](#) (IH MHSU) and the [WDA & REDCap Resource Sheet](#) (contracted service providers) for more information.

- |   |  |
|---|--|
| <p><b>41 Intervention Language of Service</b><br/>(Mandatory)</p>   | <p>Select 'English Only', 'French Only', 'Not a federal official language' or 'Unknown' from the drop-down menu.</p> <ul style="list-style-type: none"> <li>• <b>NEW:</b> 'Unknown' drop-down option has been made available.</li> <li>• Must be completed.</li> </ul>   |
| <p><b>42 Intervention Essential Skills</b><br/>(Conditional)</p> <p>(Previously called Increase in Literacy and Essential Skills)</p> | <p><b>NEW:</b> Must be completed if the following two conditions are met:</p> <ul style="list-style-type: none"> <li>○ <b>Intervention Code</b> '213-Skills Development' is selected, AND</li> <li>○ <b>Intervention End Date</b> is reached and entered.</li> </ul> <ul style="list-style-type: none"> <li>• Field is hidden and does not apply if these two conditions are not met.</li> <li>• Select 'Yes' or 'No' from the drop-down menu pictured above to reflect that a client has experienced an increase in an essential skill.</li> <li>• This data point is used to reflect that a client has experienced an increase in an essential skill. Only one essential skill needs to be assessed. When the essential skill to be assessed is not clear, select literacy.</li> </ul> |

• **NEW: See Appendix B of this guide for Intervention Code definitions.**

**43 Intervention Credential**  
(Conditional)

(Previously called Credential/Certificate Earned as a Result of Intervention)

Select 'Yes', 'No' or 'Not Applicable' from the drop-down menu.

• A credential/certificate is defined as a degree or certificate that is nationally or provincially/territorially recognized. For example a university degree, college certificate, trades designation, high school diploma or equivalent, safety certification.

• **NEW:** Leave blank until **Intervention End Date** is reached.

• Must be completed once **Intervention End Date** is reached and entered.

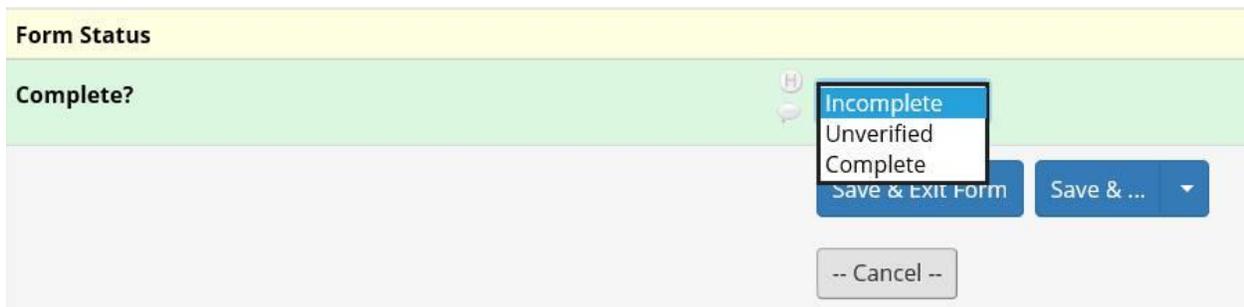
• **NEW:** Field is hidden until **Intervention End Date** is entered.

Form Status & Saving Your Work

*Form Status*

Use the Form Status section pictured below to indicate whether you are actively working with a client.

**NOTE:** This is not a mandatory field and is not reported on.



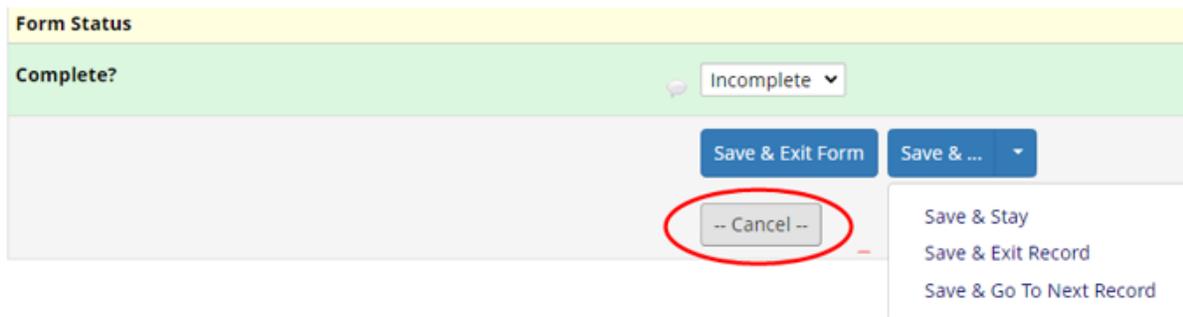
For help identifying which clients you are actively working on action plans and interventions with:

- **Incomplete:** Select 'Incomplete' if a client's action plan is in progress.
- **Complete:** Select 'Complete' once a client's action plan is complete (or a new Action Plan is being started) and all required fields are completed.

If a client wants to continue with the same action plan or goal at the end of 60 months or 5 years, a new action plan needs to be created in REDCap.

### Save Your Work

Save your work at the bottom of the Form Status section. You can either select the **'Save and Exit Form'** blue quick button pictured below, or select one of the save options in the drop-down menu pictured below.



**'Save & Stay'** and **'Save & Exit Record'** are the most user friendly save options.

1. **'Save & Stay'**: Select this to save your work and keep working on the same client record.
2. **'Save & Exit Record'**: Select this to save your work and exit the client record you are currently in.

Click the gray **'Cancel'** button circled above to leave the record you are working in without saving your work.

**REDCap will log you out after 30 minutes of inactivity. Make sure you save your work!**

**Note:** Download and print a blank Participant Information form by clicking the **'Download PDF of Instrument'** button at the top of existing client records as pictured below. **Electronic collection of information is strongly recommended due to the nature of the client information being collected.**

The screenshot displays the REDCap interface for a 'Workforce Development' project (PID 14). The left sidebar shows the navigation menu with 'Participant Information' selected. The main content area shows the 'Participant Information' form for Record ID 1-3. The form includes the following fields:

- Social Insurance Number:** 345678910 (Required: \* must provide value)
- Last Name:** Sparrow (Required: \* must provide value)
- First Name:** Jack (Required: \* must provide value)
- Date of Birth:** 1986-02-23 (Required: \* must provide value)
- Email Address:** jsparrow@hotmail.com
- Phone Number:** 250-234-5678 (Required: \* must provide value; Note: Area code must be in Canada. Enter as 250-555-1234)
- Education Level:** University Degree (Required: \* must provide value)

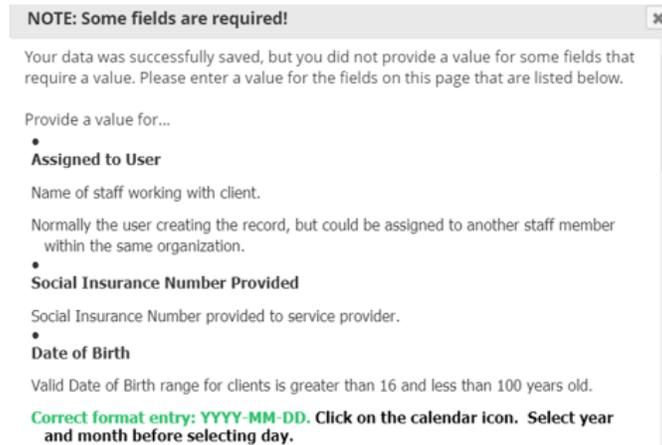
## Data Quality Alerts When Saving Your Work

There are two different alerts you might see when saving your work:

1. Warnings for missing **\*must provide value** fields;
2. Data quality warnings.

### Missing *\*must provide value* fields

If any of the required **\*must provide value** fields are incomplete when saving your record, an alert message similar to the one below will appear identifying which mandatory fields still need to be completed.



Select **'Okay'** at the bottom to return to the record and complete the required fields. Follow the instructions on the Reference Sheet for Correcting REDCap Errors available on the [MHSU Psychosocial Rehabilitation Toolkit](#) (IH MHSU) and the [WDA & REDCap Resource Sheet](#) (contracted service providers) to complete any missing required fields.

Selecting **'Okay'** on the screen that appears similar to the one above will also allow you to view any data quality warnings for the record that will appear next.

**Note:** If **'Ignore and leave record'** is selected, it will skip the data quality warnings discussed below until the next time you save the record.

**A reminder that ALL *\*must provide value* fields must be completed for quarterly submission deadlines. Any records with missing required fields cannot be submitted for mandatory provincial and federal reporting.**

### *Data Quality Warnings*

If any fields on the form contain data entries that have not been entered correctly when saving your record, a warning message similar to the one below will appear identifying which fields contain errors.

To view these warnings, select **'Okay'** on the previous missing required field alert that appears.

**WARNING: Data Quality rules were violated!**

The Data Quality rules listed below were found to have discrepancies for this record. Review the table below to see which rules were violated so that the data values for the fields involved can be corrected, if necessary. You may exclude a result in the table by clicking the 'exclude' link on the right side, after which that rule will no longer be displayed for this record whenever the record is saved.

	Rule(s) violated	Fields involved	Exclude
❗	<b>Rule #2: Action Plan End Date greater than today</b> datediff("today", [actionplanenddate], 'd', true) > 1	actionplanenddate: <a href="#">2025-11-19</a>	<a href="#">exclude</a>
❗	<b>Rule #8: Intervention End Date greater than today</b> datediff("today", [interventionenddate], 'd', true) > 1	interventionenddate: <a href="#">2025-11-19</a>	<a href="#">exclude</a>
❗	<b>Rule #18: Date of Birth invalid range</b> datediff([dateofbirth], "today", 'y', false) < 16 or datediff([dateofbirth], "today", 'y', false) > 100	dateofbirth: <a href="#">2020-11-18</a>	<a href="#">exclude</a>

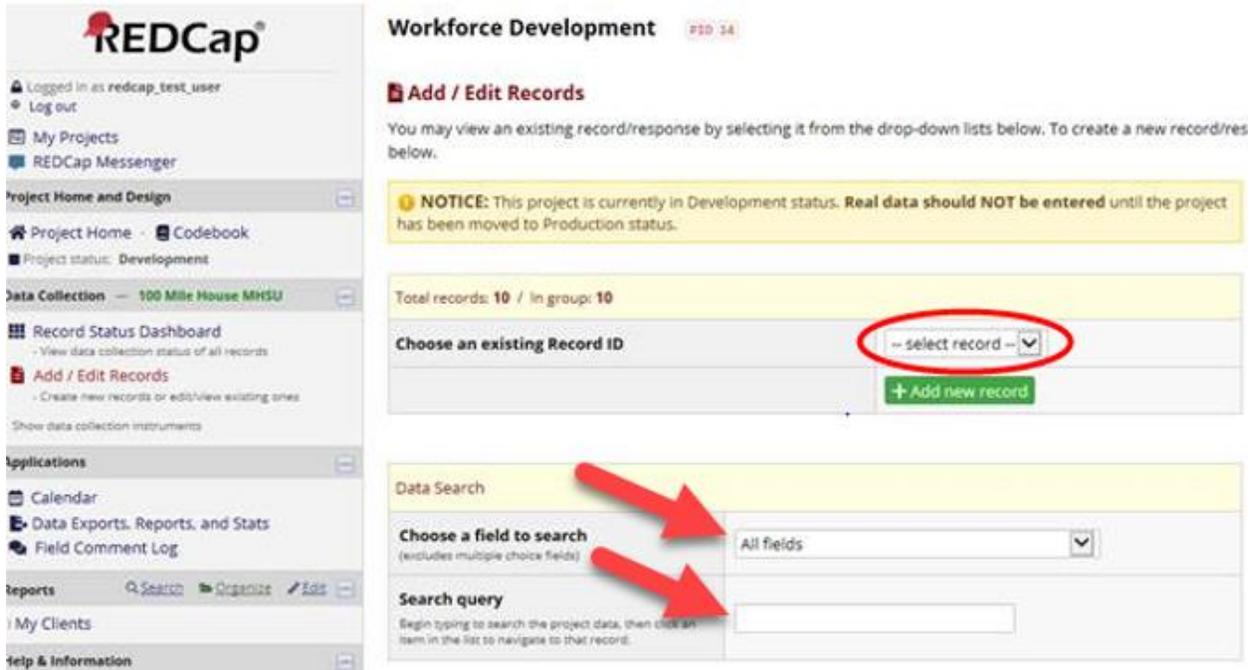
Follow the instructions on the Reference Sheet for Correcting REDCap Errors available on the [MHSU Psychosocial Rehabilitation Toolkit](#) (IH MHSU) and the [WDA & REDCap Resource Sheet](#) (contracted service providers) to correct entries with data quality warnings.

**All errors must be corrected for quarterly data submission deadlines. Any client records containing errors cannot be submitted for mandatory provincial and federal reporting.**

### *Edit a Client Record*

To update an existing client record or Participant Information form, click '**Add/Edit Records**' on the left hand side of the **Workforce Development Project Home** page.

You will now see the **Workforce Development Add/Edit Records** page, similar to the image below.



There are two options to search for existing client records on the **Workforce Development Add/Edit Records** page:

1. Search for a record using the Record Identification or Record ID number if you know it under **Choose an existing Record ID**, circled above.
2. Use the **Data Search** function: choose a field to search from the **Choose a field to search** drop-down menu picture above, such as Last Name, then type the Last Name in **Search Query** field, and click on the record from the results that appear.

If you aren't sure whether the record appearing is one you have created, click on the new **'My Client Report'** and select the client record you want to edit from the report. This option is outlined below.

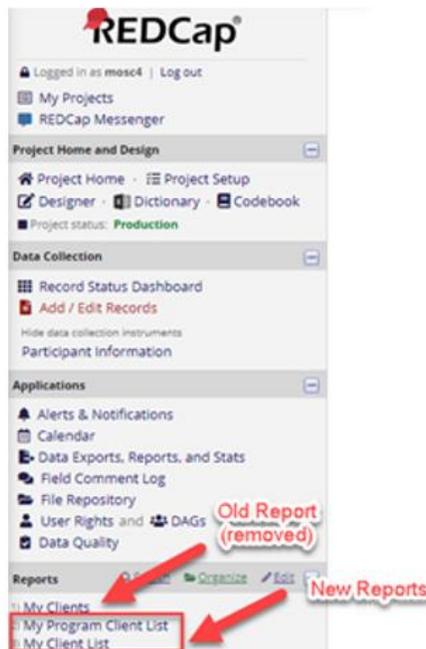
### *Run a Report*

#### View Your Client List & Program Client List

Run a report to view your client list. There are now two report options in REDCap for viewing client records:

1. **My Client List:** This report generates a list of the client records **only you** have created or records you have recently accessed (e.g. you were working with a client for a colleague while they were away).
  - a. Complete the **Assigned to User** field to have your records appear in this report.
2. **My Program Client List (previously called My Clients):** This report generates a list of all client records created in the DAG you are assigned to.

To run these reports, click on the name of the report you want to view (**'My Client List'** or **'My Program Client List'**) on the left hand side of the Project Home page under Reports, pictured below.



You will now see the **Workforce Development Data Exports, Reports and Stats** page with your report, similar to the image below.

Number of results returned: 11  
 Total number of records queried: 12

Stats & Charts | Print Page | Edit Report

Click on the Record ID to view Record Details

Record Status

Click to sort Ascending or Descending

Record ID	Complete? participant information complete	Social Insurance Number socialinsurancenum	Last Name lastname	First Name firstname	Date of Birth dateofbirth	Email Address emailaddress	Phone Number phonenumber	Education Level educationlevel	Education Level Comment educationlevelcomment	Client's Gender clientsgender	Marital Status maritalstatus	Language Spoken languagespoken	Person with a Disability disability	Indigenous Identity indigenousidentity	Immigrant Status immigrant	Imm Year immi
1-1	Incomplete (0)	123456789	Testerson	Test	2002-06-11	test@gmail.com	250-123-4567	High School (Secondary) Diploma or equivalent (5)		Male (1)	Married or equivalent (1)	English Only (2)	No (2)	Yes (1)	No (2)	0000
1-2	Complete (2)	234567890	Redcap	Reddy	1973-12-20		No Telephone	Some post-secondary training (6)		Prefer not to report (9)	Prefer not to report (9)	English Only (2)	Prefer not to report (9)	Prefer not to report (9)	Prefer not to report (9)	0000
1-3	Complete (2)	345678910	Sparrow	Jack	1986-02-23	jsparrow@hotmail.com	250-234-5678	University Degree (14)	Complete undergrad - Psychology	Male (1)	Single (2)	English and French (6)	Prefer not to report (9)	Yes (1)	No (2)	0000
1-4	Complete (2)	456789123	Smith	Jane	1978-10-12	smith_j@live.ca	250-345-6789	Some post-secondary training (6)		Unspecified (3)	Prefer not to report (9)	English Only (2)	Yes (1)	No (2)	Yes (1)	0000
1-5	Incomplete (0)	999999999	Marvel	Captain	1954-06-30	marvelc@hotmail.com	250-456-4321	University Degree (14)	English	Female (2)	Married or equivalent (1)	English and French (6)	Yes (1)	No (2)	No (2)	0000
1-6	Complete (2)	987654321	Doe	John	1997-03-18		250-987-6543	Some post-secondary training (6)		Unspecified (3)	Single (2)	Not a federal official language (9)	Yes (1)	No (2)	Yes (1)	1998

To open and view a client record, click on the 'Record ID' associated with that record, pictured above. REDCap automatically assigns clients a Record ID in numerical order based on the number assigned to their DAG and based on when Participant Information forms or records are created.

**Example:** On the test site, the staff member entering test client information belongs to DAG 1. Test Testerson was the first client record created. Their Record ID is 1-1. Reddy Redcap was the second client record created. Their Record ID is 1-2.

To sort a column, click on any of the double arrows at the top of each column title.

**Example:** To find a specific client quickly, click on the double arrows at the top of the Last Name or First Name columns pictured above. This will organize your My Clients report alphabetically. Then click on the Record ID of the client whose record you want to view. You can then view or edit that particular record.

You can also use the scroll bar at the bottom of your report to see a summary of all of the information you have entered for each client.

### Delete a Client Record

Contact [WDA@interiorhealth.ca](mailto:WDA@interiorhealth.ca) if you create a duplicate client record or create a record for a client who does not need to be reported on under the WDA. REDCap users cannot delete client records. Include the Record ID number of the client record that needs to be

deleted and the client's name for verification in your email. Client records cannot be recovered once they are deleted from REDCap.

## Log Out

Always remember to log out when you are done using REDCap by clicking '**Log out**' at the top of the left hand side of your screen as pictured below. Remember to save your work before you log out.

As a security feature, REDCap will log you out after 30 minutes of inactivity. Save your work frequently.



## Additional Resources

Additional resources are linked below.

- **IH MHSU staff:** See the [MHSU Psychosocial Rehabilitation Toolkit](#) for further information on the WDA.
- **Contracted service providers:** See the [WDA & REDCap Resource Sheet](#) for further information.

## Help

Who to contact with questions:

- Contact the IMIT Service Desk at [ServiceDesk@interiorhealth.ca](mailto:ServiceDesk@interiorhealth.ca) for any technical issues. (Example: Why am I seeing an error message when I click on....).
  - **Contracted service providers:** Tell the Service Desk that you are an external REDCap user.
- Contact the MHSU Network at [wda@interiorhealth.ca](mailto:wda@interiorhealth.ca) for any other questions.

## Appendix A – WDA Intervention Titles & Codes

Services under the WDA are grouped into three intervention titles or types as outlined below. Examples of intervention codes for each intervention title are provided below.

### *Pre-Employment Support Services*

The objective of pre-employment support services is to increase independence to enhance employment skills and opportunities. Services include:

- Employment assessments (such as an Occupational Therapist assessment) that may be carried out over one or more sessions;
- Counselling and supports to establish employment goals;
- Social skills training, e.g. to improve communication skills;
- Resume writing support;
- Job development services such as job search and job start supports;
- Job interview assistance;
- Coaching to support the client to get ready for employment opportunities, including supported employment;
- Employment skill development, learning specific employment skills such as computer literacy;
- Paid or unpaid work experiences such as Work Crews looking after garden maintenance;
- Therapeutic Volunteer Programs (TVP) to provide volunteer opportunities to improve social and communication skills;
- Additional enabling supports that individuals require to participate in employment services (e.g. assistive devices, workplace attendants); and
- Short-term training.

### *Supported Employment Services*

The objective of supported employment services is to support clients to successfully achieve and maintain competitive employment. Services include:

- Placement and training opportunities in a competitive employment setting;
- Individual Placement Support (IPS) programs to support individuals in competitive employment settings;
- Social Enterprise Programs providing employment opportunities and on the job training;

- Job coaching and extended employment supports and follow up (for both the client and employer);
- Employment finding and connecting services;
- Rapid access to services for clients at risk of losing their employment;
- Additional enabling supports that individuals require to participate in employment services (e.g. assistive devices, workplace attendants); and
- Self-employment assistance.

### *Supported Education Services*

The objective of supported education services is to increase independence and successfully complete post-secondary studies. Services include:

- Counselling and supports to establish educational goals;
- Assistance in participation of education upgrading – includes completing short term courses (e.g. food safe, first aid certifications), acquiring high school diplomas, and pursuing post-secondary courses and certifications;
- Assistance with applying and registering for educational opportunities;
- Advocacy for special accommodations and supports to participate in educational opportunities (e.g. extending the educational course over a longer period of time to meet individual needs);
- Coaching to help clients maintain and complete their educational goals; and
- Additional enabling supports that individuals require to participate in educational settings (e.g. assistive devices, educational attendants).

## Appendix B – Intervention Code Definitions

Intervention Codes are defined below. Definitions are taken from the WDA Glossary of Data Elements on the [MHSU Psychosocial Rehabilitation Toolkit](#) (IH MHSU) and the [WDA & REDCap Resource Sheet](#) (contracted service providers).

<b>Job search assistance</b>	Provides structured and individualized supports to assist individuals based on their existing level of skills and qualifications in conducting informed job search activities. Activities include individual or group assistance with: job searches; resume writing; interview and job preparation; job finding clubs, etc. Activities focus on finding work.
<b>Counselling / coaching</b>	Individualized case management services and counselling supports that monitor individuals' progression in implementing their action plan and/or provide specialized assessments and professional diagnostic services related to physical, social, intellectual, and/or psychological traits that may have an impact on their ability to participate in training or to occupy specific jobs.
<b>Unassisted services</b>	Employment resource centres that have available information on the local labour market, employment opportunities, career planning, education and training programs, and equipment to support unassisted job search, career planning, occupational requirements, and training programs.
<b>Other employment assistance</b>	Employment assistance service supported activities that are not identified in the other categories. This can include job retention activities and job placement assistance.
<b>Occupational skills training</b>	Funded interventions through public or private post-secondary institutions leading to certification or a diploma with the aim of obtaining employment for individuals. This includes individuals training while employed.
<b>Short-term training</b>	Short duration training certificates/courses (e.g. first aid certifications, food safety) needed to meet the specific job or industry requirements.
<b>Literacy, essential</b>	Individuals receive interventions that focus on upskilling of literacy, essential skills and language training and are assisted to complete

**skills, language training and adult basic education** their high school diploma or high school equivalency. This category includes any literacy, essential skills, or language training conducted for pre-apprenticeship programs.

**Apprenticeship** Apprentices are employed persons who are attached to an employer and registered with an apprenticeship agency. Apprentices are released by their employer in order to attend technical classroom training.

**Other skills development** Other skills development activities that are not identified in the other categories.

**Job creation partnership** Community-oriented projects that provide work experience to participants.

**Self-employment assistance** Financial assistance to individuals as they prepare for and implement a new business.

Note: Codes for 221 – Wage Subsidies, 224 – (Targeted) Earnings supplements, and 311 – Fee Payer were removed from the list of applicable Intervention Codes (April 2022), because these interventions are not applicable in British Columbia, as per the Ministry of Health.