

RDP User Guide

1 — Last update: 2018/02/16

Faces and Voices of Recovery

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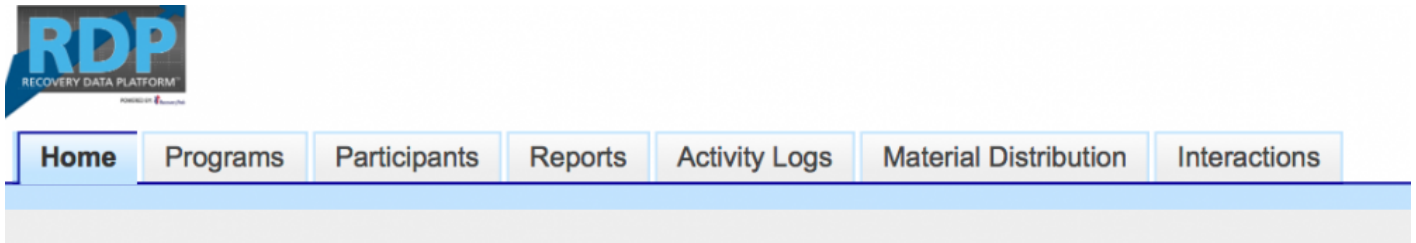
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1. Recovery Data Platform (RDP) Introduction

Welcome! The Recovery Data Platform (RDP) is a cloud-based software solution developed in part by Faces and Voices of Recovery and Recovery Trek. The purpose of the platform is to aid RCO's and Peer Service Providers with the tools and assessments needed to effectively implement peer recovery coaching programs. Through the use of robust reporting and scheduling tools, RDP is able to provide your organization better outcomes data and service management.

2. RDP Overview

Navigation in RDP is fairly straightforward, with two navigation menus and a sidebar. Both navigation menus, along the top of each page and in the footer, allow you to navigate to different segments of RDP – Home, Programs, Participants, Reports, Activity Logs, Material Distributions and Interactions.





The sidebar provides additional navigation tools, including an advanced search bar, a recent items list, an activity log and profile settings.

Advanced Search



Recent Items

-  [Monty Python](#)
-  [Freddie Mercury](#)
-  [FAVOR](#)
-  [FAVOR TRS](#)
-  [William Wilson](#)
-  [Distribution-2105](#)
-  [James Bond](#)
-  [Activity-4399](#)
-  [Obi Wan Kenobi](#)
-  [Activity-4400](#)

Activity

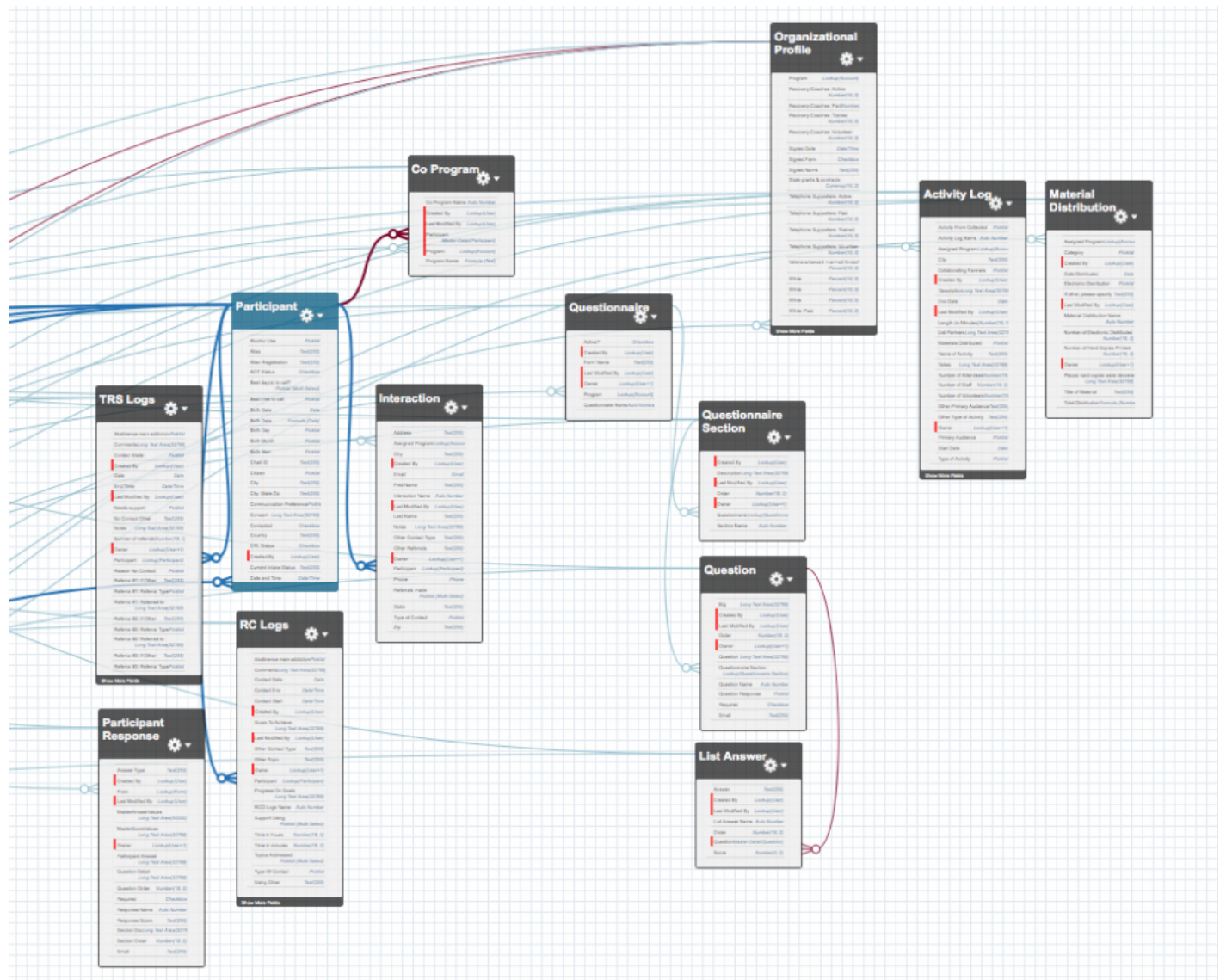
- [Activity Log](#)

Welcome, FAVOR RCO

[My Profile](#) | [Logout](#)

RDP comes equipped, out of the box, with the following tools:

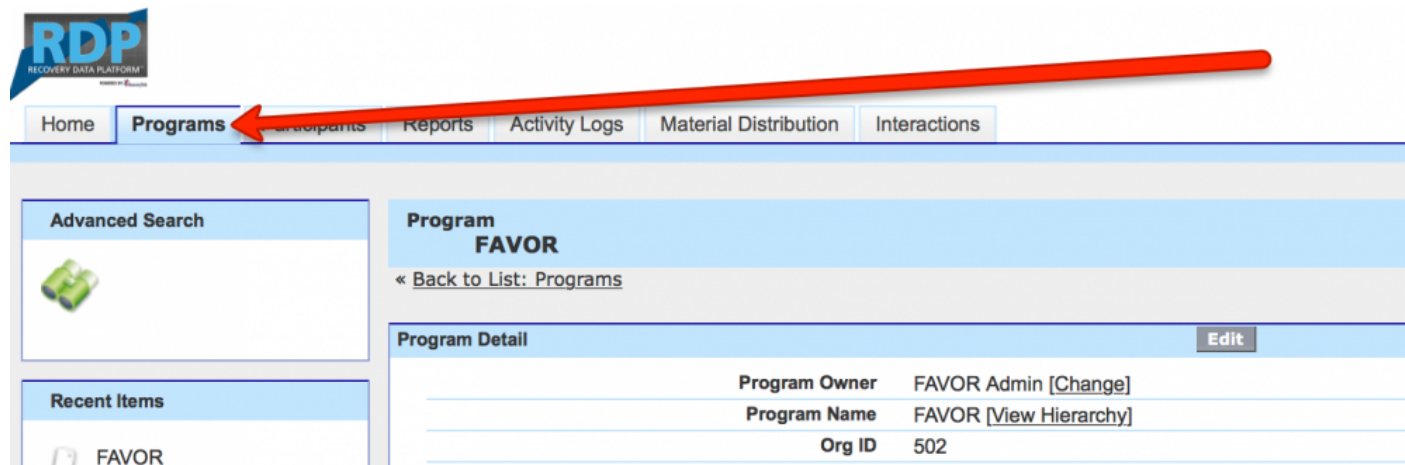
- Program Management
 - This tool allows your organization to create several different programs, each with their own unique descriptions and assessment tools
- Participant Management
 - This tool helps your organization keep meticulous records on all program participants, including contact and demographic information, and recovery vital signs.
- Telephone Recovery Support Dashboard
 - This dashboard provides your team with a dynamic list of program participants, highlighting which participants need to be called, and when.
- Resource Material Management
 - This tool helps your organization create and track digital and physical resource materials that are distributed
- Activity and Event Management
 - Activities and events hosted by your organization can be easily recorded, and reported on, in RDP
- Interactions
 - Interaction recording allows you to capture information that details individual interactions with your organization. This tool is especially helpful in tracking contact points with people who are not program participants.
- Reporting
 - The base RDP license package includes access to several powerful built-in reports and charts that empowers your organization to see and work within your data.
 - Should your organization's unique needs require custom reports, you can work with Faces and Voices to determine the best solution. Report Creation Licenses are available for an additional fee, or Faces and Voices be hired to build the custom reports for your organization.



RDP is designed with your organization's unique needs in mind and has several features built-in that allow you to customize the platform to your organization's needs.

3. Getting Started with Programs

Programs, as previously noted, allow your organization to keep services and participants organized by the program they are enrolled in. Please keep in mind that only instance administrators will have permission to create and edit program details. The program interface can be accessed by instance administrators by clicking on “Programs” in the top navigation menu.

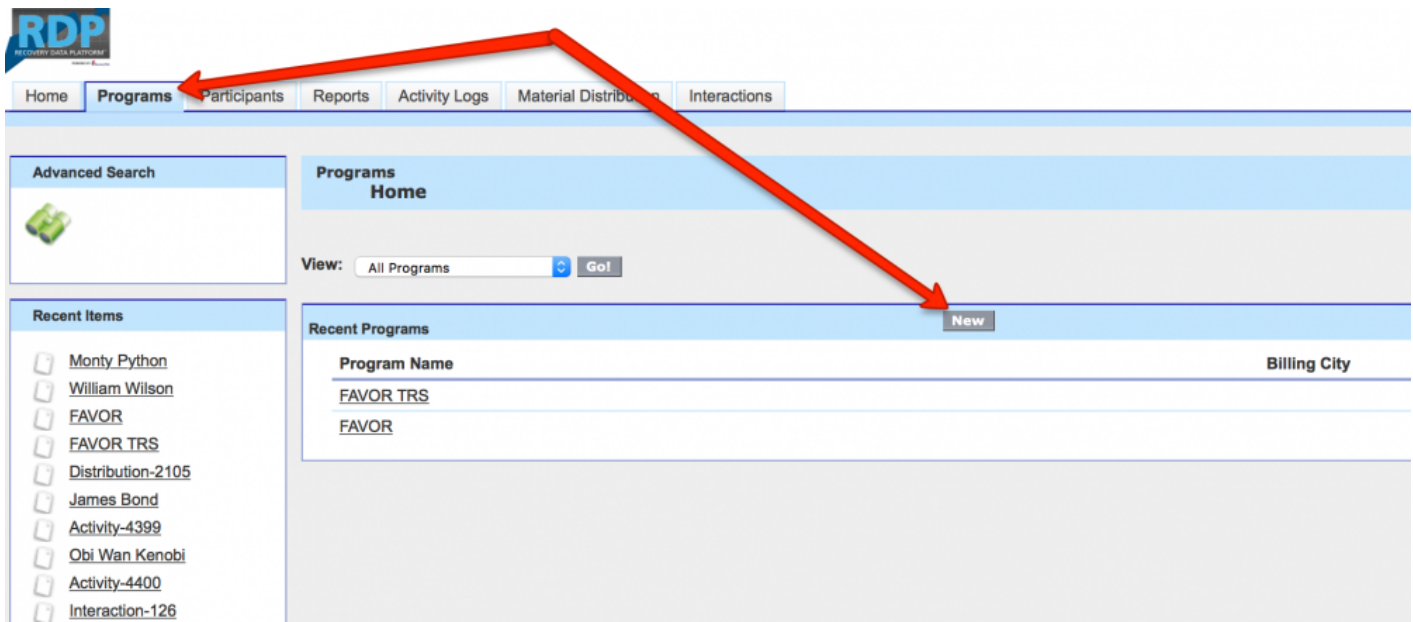


Upon first logging in to your organization's instance of the Recovery Data Platform, only one program is configured. This program is the parent (or master) program and, generally, shares a name with your organization. It is important to populate the parent program with organization details, i.e. description, contact information, and Organization ID. When creating new programs, this is the program that will be referenced in the “Parent Program Field.”

3.1. Adding a New Program

Often times, organizations operate and implement several programs at a given time, each with unique needs and data points. The RDP provides the capacity to create, track and report on different programs with relative ease.

In order to create a new program, navigate to the 'Programs' tab in the top navigation menu, and click on the grey 'New' button.



This action will take you to an empty form, in which you'll need to fill out the details of the new program. When filling this form out, it is necessary to assign a parent program. This parent program should be the name of the organization. After finishing the form, be sure to click save!

Program Edit			Save	Save & New	Cancel
Program Information					
Program Owner	FAVOR RCO			Phone	<input type="text"/>
Program Name	<input type="text"/>			Fax	<input type="text"/>
Org ID	<input type="text"/>			Website	<input type="text"/>
Parent Program	<input type="text"/>			Program Holder	<input type="text"/>
Description	<input type="text"/>				
Billing Street	<input type="text"/>			Shipping Street	<input type="text"/>
Billing City	<input type="text"/>			Shipping City	<input type="text"/>
Billing State/Province	<input type="text"/>			Shipping State/Province	<input type="text"/>
Billing Zip/Postal Code	<input type="text"/>			Shipping Zip/Postal Code	<input type="text"/>
Billing Country	<input type="text"/>			Shipping Country	<input type="text"/>
			Save	Save & New	Cancel

3.2. Setting up a New User

Each organization's RDP instance license includes 10 individual user licenses, and establishing a new user is a simple process. First, you'll need to navigate back to the master/parent program page, and click on the grey "New Contact" button.

to List: Programs		
Program Detail		Edit
Program Owner	FAVOR Admin [Change]	
Program Name	FAVOR [View Hierarchy]	
Org ID	502	
Parent Program		
Description		
Address Information		
Billing Address		
System Information		
Created By	FAVOR Admin, 4/21/2017 4:08 PM	
	Edit	
Questionnaires		New Questionnaire
Questionnaire Name	Form Name	
Questionnaire-1	Recovery Capital Data	
Questionnaire-2	Lifestyle Data	
Questionnaire-3	Substance Use Data	
Questionnaire-4	Engagement Scale Data	
Questionnaire-290	(BARC) Brief Addiction Recovery Capital	
		New Contact
Contact Name	Title	Email
FAVOR RCO		
test rdp		testz@facesandvoicesofrecovery.org
Participants		New Participant
Name	Email	Phone (Work)
Jane Bond	jane@anywhere.com	(212) 555-1212
New Guy		(305) 242-1185
Jane Bond	jane.bond@anywhere.com	

Next, you'll need to fill out the form with the new user's information. After completing this form, click save.

The last required step is for your instance administrator to email rdp@facesandvoicesofrecovery.org and request for the new user to be enabled.

3.3. Customizing Assessment Tools

As previously discussed, separate programs often require unique assessment tools, and the Recovery Data Platform allows your organization the flexibility to create program-specific questionnaires that capture additional data points.

First, you'll need to navigate to the appropriate program to create the new questionnaire. Next, you'll click on the grey "New Questionnaire" button.

Program
FAVOR TRS

[« Back to List: Programs](#)

Program Detail

Edit

Program Owner

FAVOR RCO [\[Change\]](#)

Program Name

FAVOR TRS [\[View Hierarchy\]](#)

Org ID

Parent Program

[FAVOR](#)

Description

Address Information

Billing Address

System Information

Created By

FAVOR RCO, 2/2/2018 3:46 PM

Edit

Questionnaires

New Questionnaire

Action	Questionnaire Name	Form Name
	Questionnaire-367	Substance Use Data
	Questionnaire-368	Engagement Scale Data
	Questionnaire-369	Lifestyle Data
	Questionnaire-370	Recovery Capital Data
	Questionnaire-371	(BARC)Brief Addiction Recovery Capital
	Questionnaire-377	

Contacts

New Contact

No records to display

Participants

New Participant

No records to display

Next, you'll confirm the program that this questionnaire will be active for, name the program, and activate the form. After completing these three fields, click save.

Questionnaire Edit Save Save & New Cancel

Information

Program

Form Name

Active? ☐

Save Save & New Cancel

You'll then be taken to a page where you can define the new questionnaire's structure. Often times, shorter questionnaires only require a single section. For longer assessments, it's generally beneficial to separate the questionnaire into multiple sections. On this page, you can create and title new questionnaire sections by clicking the grey "New Questionnaire Section" button. Please bear in mind that each questionnaire requires at least one section.

Questionnaire-430

Questionnaire Detail Clone

Questionnaire Name	Questionnaire-430
Program	FAVOR TRS
Form Name	Example Assessment
Active?	<input checked="" type="checkbox"/>
Created By	FAVOR RCO, 2/15/2018 2:40 PM

Clone

Questionnaire Sections New Questionnaire Section

No records to display

Always show me [fewer](#) ▲ / ▼ [more](#) reco

In each questionnaire section, your organization is able to add new questions by clicking on the grey "New Question" button. You'll be taken to a page that allows you to construct the question with the following fields:

- Questionnaire Section
 - This field is autopopulated, but allows you to change the location of this question if needed
- Order

- This field dictates the order of the question (i.e. if order is set to 1, this will be the first question in the section)
- Required
 - This checkbox allows you to make this question required or optional
- Question
 - This field is where you will compose the question
- Question Response
 - This drop-down menu allows you to dictate how the question is answered, with the following options:
 - Text
 - Pick list (or drop-down menu)
 - Multi-Pick List (allows multiple options to be selected from a drop-down menu)
 - Pick list with other (automatically creates 'other' option in drop-down menu)
 - Slider

After you've created the question, click save. If you're in the process of creating multiple questions, clicking on "Save and New" will return you to a fresh question creation form. When creating a picklist, you'll be taken to a new form where you can detail what answers are included in the drop-down menu.

Questionnaire Section**Order****Required**☐**Question****Question Response**

4. Navigating Participants

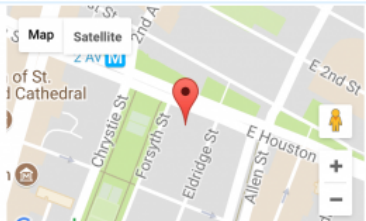
Participant records can be accessed by navigating to the 'Participants' tab in the top navigation menu, or by navigating to the program that the participant is enrolled in. When navigating to a participant record, you'll see the existing details of the record. Should you need to edit the record, you can click the grey "Edit" button. Each participant record is broken apart into several sections:

- Participant Detail
 - This section provides basic details regarding the participant, including name, program, birthdate, gender and other basic data points
- Contact Information
 - This section provides details surrounding contact information, communication preferences, and address details
- Demographics
 - This section provides demographic data points often required for grant reporting
- Number of Children
 - This section allows for the entry of child custody details
- Legal Status
 - This section provides details surrounding the participant's involvement in the criminal justice system
- Calling Preference
 - This section details the program participant's calling preference
- Contact Consent
 - This section covers e-consent for contacting the program participant
- Recovery Vital Signs
 - This section includes links to Recovery Vital Sign Reports pertaining to the participant, which we'll cover in more depth in the next section
- Forms
 - This section provides access to recent completed assessments, and provides the option to record new assessments for the participant
- Intake Information
 - This section details prior intake assessments, and provides the option to record new intake forms, which we'll cover in more depth in the further sections
- Interactions
 - This section details prior interactions, and provides the option to record new interaction forms, which we'll cover in more depth in the further sections
- TRS Logs

- This section details prior TRS logs, and provides the option to record new logs, which we'll cover in more depth in the further sections
- RC Logs
 - This section details prior RC logs, and provides the option to record new logs, which we'll cover in more depth in the further sections

Participant Detail		Edit	Clone
Name	Monty Python	Birth Date	2/18/1960
First Name	Monty	Birth Day	18
Middle Name		Birth Month	02
Last Name	Python	Birth Year	1960
Alias		Social Security #	XXX-XX-6788
Program	FAVOR	Gender	Male
		Other Gender	
		Orientation/Identity	Straight
		Other Orientation/Identity	

Contact		Email
Facility		holygrail123@outlook.com
Street Address	143 E Houston St	Phone (Work)
City	New York	Phone (Work) Ext
State	NY	Phone (Home)
County		Phone (Cell)
Zip	10002	(212) 260-7280
Move In Date	1/15/2018	Communication Preference
Lives With	Girlfriend	Leave Voicemail Messages
Lives In	Own/rent apartment	Yes
		Phone (Other)
		Other Phone Type
		Leave Voicemail Messages Other



4.1. Recovery Vital Signs

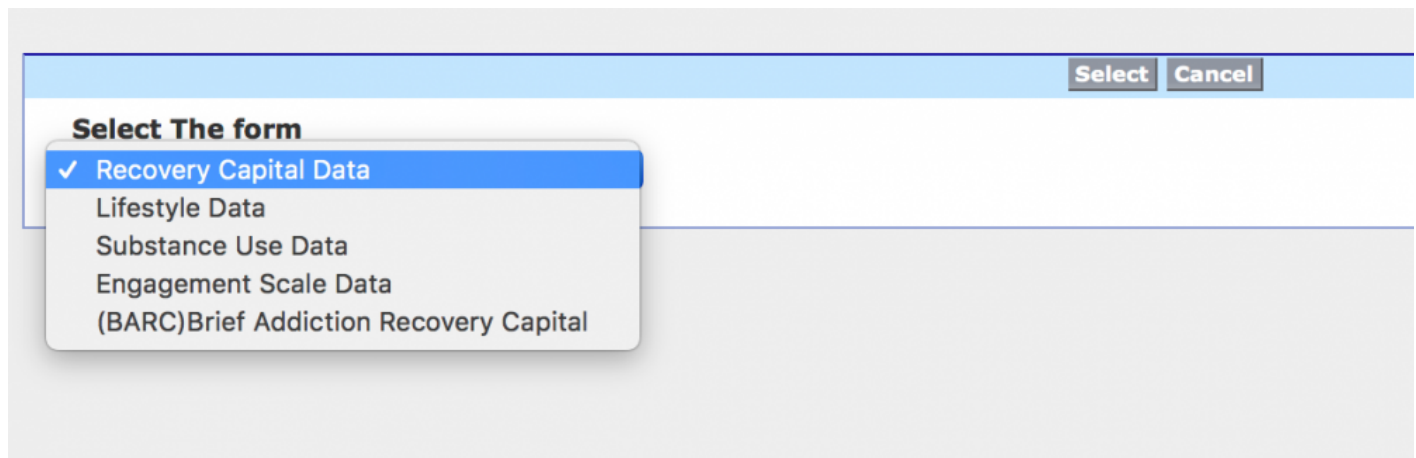
Recovery Vital Signs (RVS) are tools native to the Recovery Data Platform that allow your organization insight into the recovery of program participants. These vital signs are comprised of several evidence-based assessment tools, including:

- Engagement Scale
 - Outcome Rating Scale
 - Relationship Rating Scale
 - Craving Rating Scale
- Assessment of Recovery Capital

These assessment tools aid in constructing a qualitative recovery story for each program participant. In order to view one of the seven available participant reports, click into one of the links under the 'Recovery Vital Signs' section.



The assessments (or questionnaires) that RVSS are comprised of are the Engagement Scale Questionnaire and the Recovery Capital Assessment. To complete a new assessment for a participant, click the grey 'New Form' button in the forms section, and select either the Recovery Capital Data or Engagement Scale Data form.



Organizations are contractually bound to complete an engagement scale data form once a week per participant, or at every touch-point with program participants, and a Recovery Capital Data form every 6 months per participant. This data aids in national advocacy efforts.

4.2. Recording an Intake

The Intake Information form enables organizations to collect important details that capture the beginning of a program participant's recovery story. After creating a new participant, intake information can be entered by clicking on the grey "New Intake Information" button.

The screenshot displays the RDP user interface for recording an intake. At the top, there is a header section with the following information:

- Recovery community organization consent:** Recovery is Happening
- Created By:** FAVOR RCO, 1/18/2018 4:55 PM
- Last Modified By:** FAVOR RCO, 2/15/2018 1:47 PM

Below the header, there is a section for **Recovery Vital Signs** with the following data:

RRS	Engagement Scale	ORS to CRS
CRS	Recovery Capital Scale	RRS to CRS
ORS		

Below the vital signs, there is a **Forms** section with a table of forms:

Action	Form Name	Form Type	Last Modified Date	ORS	CRS	RRS
Edit	Form-480	Engagement Scale Data	1/18/2018	40.0	10.0	40.0
Edit	Form-479	Engagement Scale Data	1/18/2018	15.5	4.0	13.5
Edit	Form-478	Engagement Scale Data	1/18/2018	27.0	9.0	37.0
Edit	Form-477	Engagement Scale Data	1/18/2018	25.0	6.5	30.0
Edit	Form-476	Engagement Scale Data	1/18/2018	33.0	9.5	37.5
Edit	Form-475	Engagement Scale Data	1/18/2018	22.5	6.5	11.5
Edit	Form-474	Recovery Capital Data	1/18/2018			

Below the forms section, there is a **Intake Information** section with a table of intake information:

Action	Intake Information Name	Current Intake Status	Service	Date of Intake	Delayed Intake Date	Current Date	Last time you used
Edit	Intake-1773	Active	TRS	1/18/2018	No	1/18/2018	1/18/2018

Below the intake information section, there is an **Interactions** section with a table of interactions:

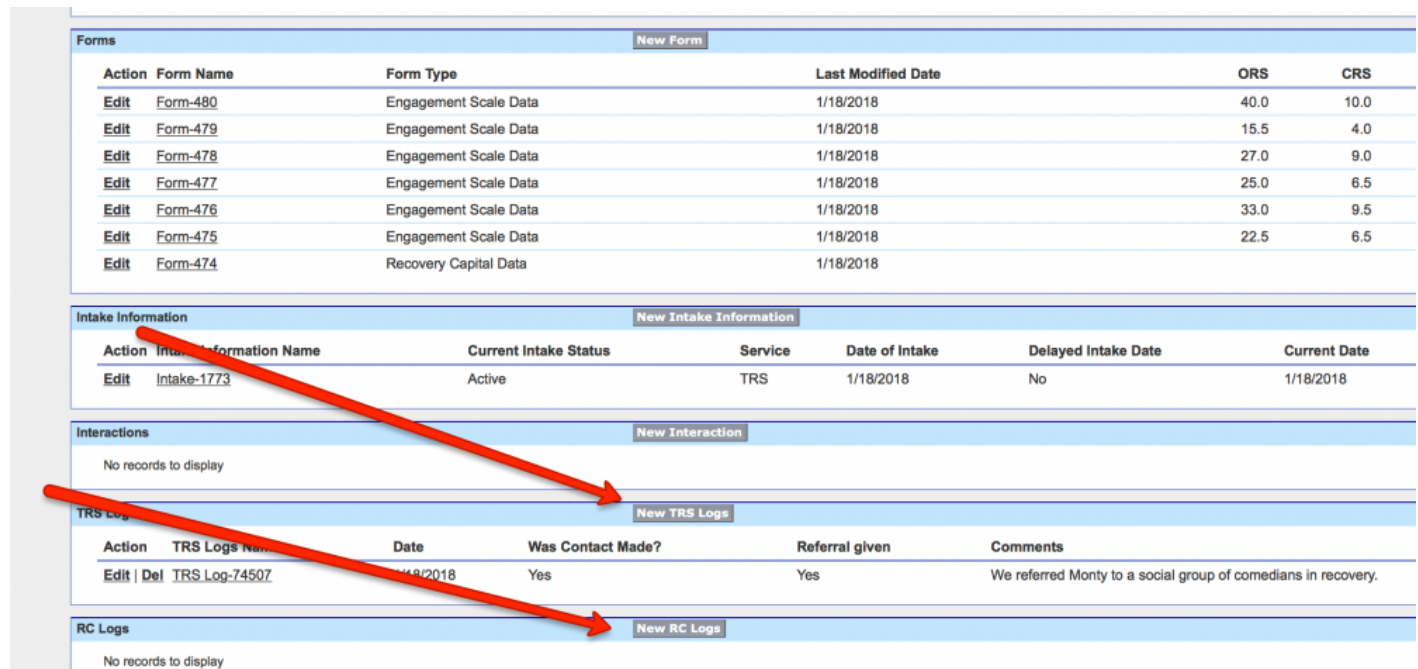
Action	Interaction Name	Interaction Type	Interaction Date
No records to display			

A red arrow points to the **New Intake Information** button, which is located in the top right corner of the **Intake Information** section.

When in the intake information form, your organization can fill important information, such as recovery date, service type, living status and recovery support. After completing the intake form, be sure to click save!

4.3. TRS and RC Logs

Telephone Recovery Support (TRS) and Recovery Coach (RC) logs document the services your organization provides to program participants, which captures notes and referrals made. To complete a TRS or RC Log, scroll to the bottom of a participant's page and click the grey "New TRS Logs" or "New RC Logs" button.



The screenshot displays the RDP user interface with several sections:

- Forms**: A table listing various forms with columns for Action, Form Name, Form Type, Last Modified Date, ORS, and CRS.
- Intake Information**: A table with columns for Action, Intake Information Name, Current Intake Status, Service, Date of Intake, Delayed Intake Date, and Current Date.
- Interactions**: A section indicating "No records to display" with a "New Interaction" button.
- TRS Logs**: A table with columns for Action, TRS Logs Name, Date, Was Contact Made?, Referral given, and Comments. It contains one record for TRS Log-74507.
- RC Logs**: A section indicating "No records to display" with a "New RC Logs" button.

Two red arrows originate from the left margin: one points to the "New TRS Logs" button in the TRS Logs section, and the other points to the "New RC Logs" button in the RC Logs section.

Forms						New Form
Action	Form Name	Form Type	Last Modified Date	ORS	CRS	
Edit	Form-480	Engagement Scale Data	1/18/2018	40.0	10.0	
Edit	Form-479	Engagement Scale Data	1/18/2018	15.5	4.0	
Edit	Form-478	Engagement Scale Data	1/18/2018	27.0	9.0	
Edit	Form-477	Engagement Scale Data	1/18/2018	25.0	6.5	
Edit	Form-476	Engagement Scale Data	1/18/2018	33.0	9.5	
Edit	Form-475	Engagement Scale Data	1/18/2018	22.5	6.5	
Edit	Form-474	Recovery Capital Data	1/18/2018			

Intake Information							New Intake Information
Action	Intake Information Name	Current Intake Status	Service	Date of Intake	Delayed Intake Date	Current Date	
Edit	Intake-1773	Active	TRS	1/18/2018	No	1/18/2018	

Interactions

No records to display

[New Interaction](#)

TRS Logs						New TRS Logs
Action	TRS Logs Name	Date	Was Contact Made?	Referral given	Comments	
Edit Del	TRS Log-74507	1/18/2018	Yes	Yes	We referred Monty to a social group of comedians in recovery.	

RC Logs

No records to display

[New RC Logs](#)

5. Using RDP to Administer Telephone Recovery Support (TRS)

The home page of the Recovery Data Platform is optimized for telephone recovery support services, and provides an automatically generated list of program participants due for TRS services. This module is broken apart into several sections that identify the best time to contact the program participants:

- Morning Calls Pending
- Evening Calls Pending
- Afternoon Calls Pending
- Calls that can be made anytime

✓ Morning Calls Pending: 5

Name(Last, First)	Phone (Cell)	Phone (Home)
<u>James, Bond-Test 3</u>		
<u>New, Guy</u>	(561) 283-3197	
<u>Jane, Bond</u>		(212) 555-1313
<u>James, Bond</u>	(123) 456-7890	
<u>William, Wilson</u>		(507) 218-4773

✓ Evening Calls Pending: 0
✓ Afternoon Calls Pending: 1

Name(Last, First)	Phone (Cell)	Phone (Home)
<u>James, Bond-Test 2</u>	(507) 555-1212	(507) 242-1123

✓ Anytime Calls Pending: 1

Name(Last, First)	Phone (Cell)	Phone (Home)
<u>Freddie, Mercury</u>		(123) 456-7890

✓ None Calls Pending: 0

When delivering TRS, you'll need to log the call. To log service delivery with a participant, click into the participant's name and click on the grey "New TRS Logs" button. Additional instruction for entering TRS Logs can be found in section 4.3, [TRS and RC Logs](#).

6. Recording Events and Activities

Activities and events hosted by your organization can be easily recorded, and reported on in RDP. Whether your organization wants to record a support group, a training or an event, this data can be entered under the 'Activity Logs' section. After navigating to the 'Activity Logs' section of RDP, you can click on 'Create New Activity Log' to record a new event.

[Reports](#) [Activity Logs](#) [Material Distribution](#) [Interactions](#)

Activity Logs Home

View: [Go!](#)

Recent Activity Logs

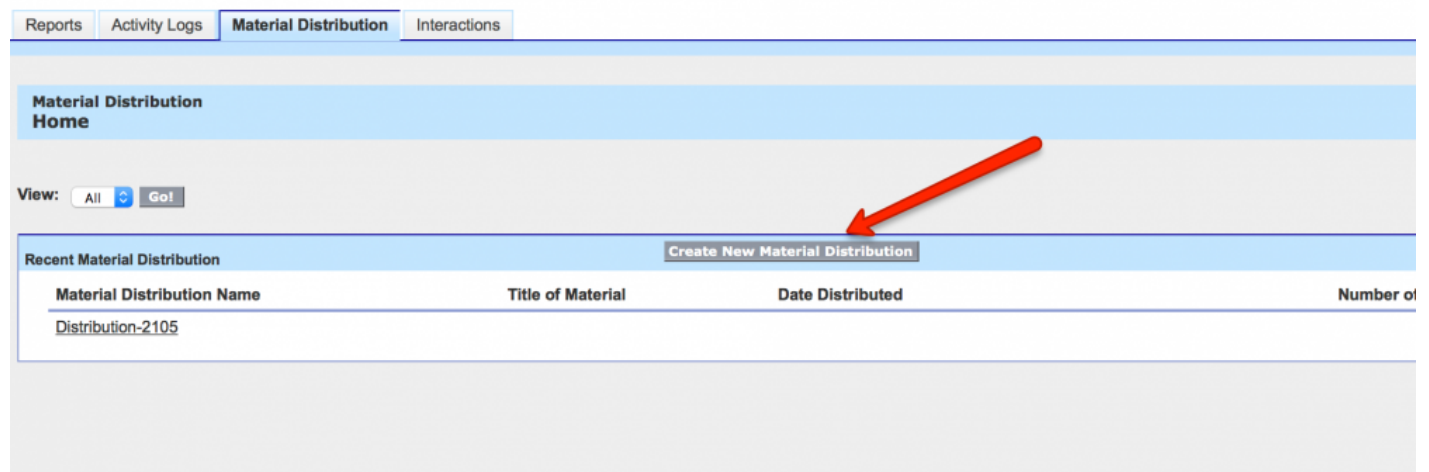
Create New Activity Log

Activity Log Name	Name of Activity	Type of Activity	Primary Audience
Activity-4399	Sober Group	Meeting	Recoverees
Activity-4400	Sober Group	Meeting	Recoverees

In the activity log, you'll be able to record details pertaining to the activity, including activity type, primary audience, associated program, etc.

7. Accounting for Material Distributions

Material Distributions can be easily accounted for and reported on in RDP by making use of the Material Distribution tab. In this section of RDP, your organization is able to review and edit prior materials and create new material distributions. This tool helps your organization track digital and physical resource materials that are distributed. After navigating to the 'Material Distribution' tab, you can create a new material distribution by clicking on the grey 'Create New Material Distribution' button.



Material Distribution Home

View: All

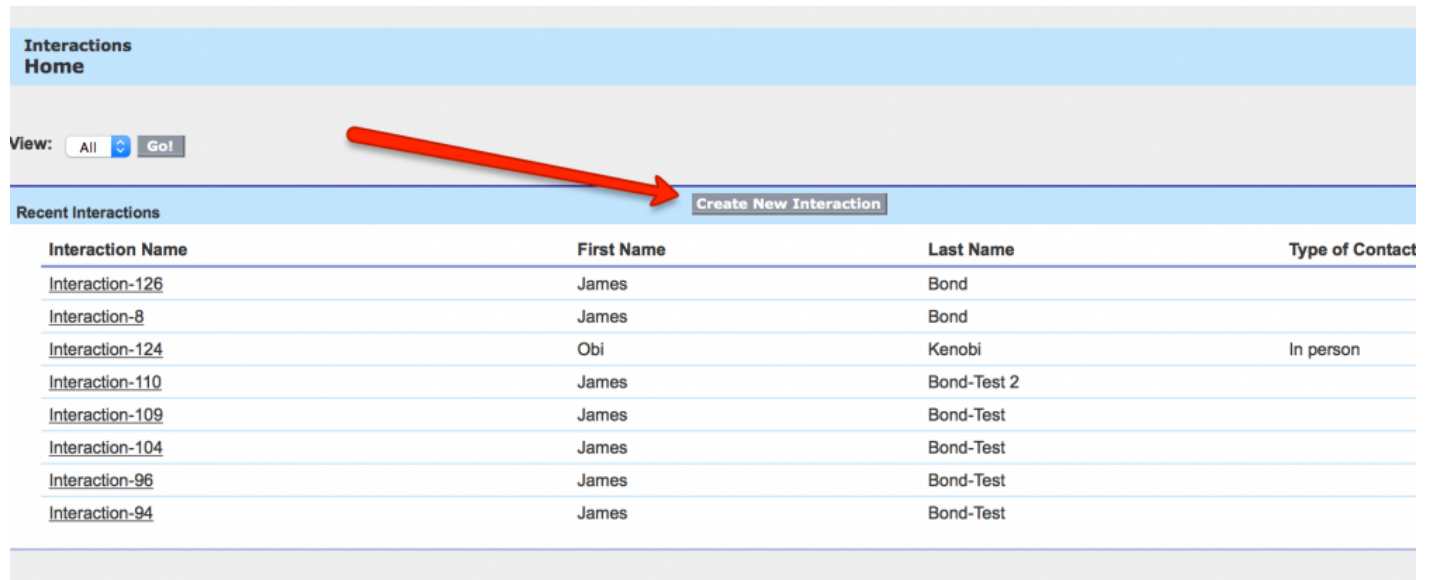
Create New Material Distribution

Material Distribution Name	Title of Material	Date Distributed	Number of
Distribution-2105			

In the material distribution form, you'll be able to record details pertaining to the material, including program assignment, category, quantity distributed, etc.

8. Tracking Interactions

Recording interactions allows you to capture information that details individual interactions with your organization. This tool is especially helpful in tracking contact points with people who are not (yet) program participants. In order to create a new interaction record, navigate to the 'Interactions' tab in the top navigation menu and click on the grey 'Create New Interaction' button.
















The screenshot shows the 'Interactions Home' page. At the top, there is a header with 'Interactions Home'. Below this, there is a 'View:' section with a dropdown menu set to 'All' and a 'Go!' button. A red arrow points to a 'Create New Interaction' button located above a table of recent interactions.

Interaction Name	First Name	Last Name	Type of Contact
Interaction-126	James	Bond	
Interaction-8	James	Bond	
Interaction-124	Obi	Kenobi	In person
Interaction-110	James	Bond-Test 2	
Interaction-109	James	Bond-Test	
Interaction-104	James	Bond-Test	
Interaction-96	James	Bond-Test	
Interaction-94	James	Bond-Test	

Next, you'll fill out as much applicable detail regarding the interaction as possible, including name, contact information, contact type, and any referrals made.

Information

Interaction Name	Interaction-124	
Assigned Program	<input type="text" value="FAVOR"/>	
Participant	<input type="text"/>	
First Name	<input type="text" value="Obi"/>	
Last Name	<input type="text" value="Kenobi"/>	
Phone	<input type="text"/>	
Email	<input type="text"/>	
Address	<input type="text"/>	
City	<input type="text"/>	
State	<input type="text"/>	
Zip	<input type="text"/>	
Type of Contact	<input type="text" value="In person"/> 	
Other Contact Type	<input type="text"/>	
Referrals made	<div> <div> Available Tx Support group Govt </div> <div>   </div> <div> Chosen Staff </div> </div>	
Other Referrals	<input type="text"/>	
Notes	<div><div></div></div>	

9. Visualizing Data with Reports

Visualizing aggregate data, and telling the story of your organization's work, can be accomplished by working out of the 'Reports' tab, found in the top navigation menu.

Each RDP instance includes 13 ready-to-run reports that detail:

- Activity Logs
- CRS
- CRS Averages
- Engagement Scale
- User Login Records (Adoption)
- ORS
- ORS Averages
- ORS to CRS
- Recovery Capital Scale
- Recovery Capital Scale Averages
- RRS
- RRS Averages
- RRS to CRS

Each of these reports can be ran by clicking on the 'All Reports' tab, and then clicking on the appropriate report. You can also utilize the report search bar if you're having trouble.

Reports

Activity Logs

Material Distribution

Interactions

Reports Home

Enter keywords to find matching custom reports.

Find Report

Report Folders

Folder

FAVOR Reports

Go!

All Reports

Recent Reports

FAVOR Reports

Edit Del Export	<u>Activity Log Report</u>
Edit Del Export	<u>CRS</u>
Edit Del Export	<u>CRS Average</u>
Edit Del Export	<u>Engagement Scale</u>
Edit Del Export	<u>Last Login of users</u>
Edit Del Export	<u>MRC Participants without Intake</u>
Edit Del Export	<u>Names To Update</u>
Edit Del Export	<u>ORS</u>
Edit Del Export	<u>ORS Average</u>
Edit Del Export	<u>ORS to CRS</u>
Edit Del Export	<u>Questionnaire</u>
Edit Del Export	<u>Recovery Capital Scale</u>
Edit Del Export	<u>Recovery Capital Scale Average</u>
Edit Del Export	<u>RRS</u>
Edit Del Export	<u>RRS Average</u>
Edit Del Export	<u>RRS to CRS</u>
Edit Del Export	<u>RRS Log of MRC</u>

Each report can be printed or exported by clicking on the grey 'Printable View' or 'Export Details' buttons.

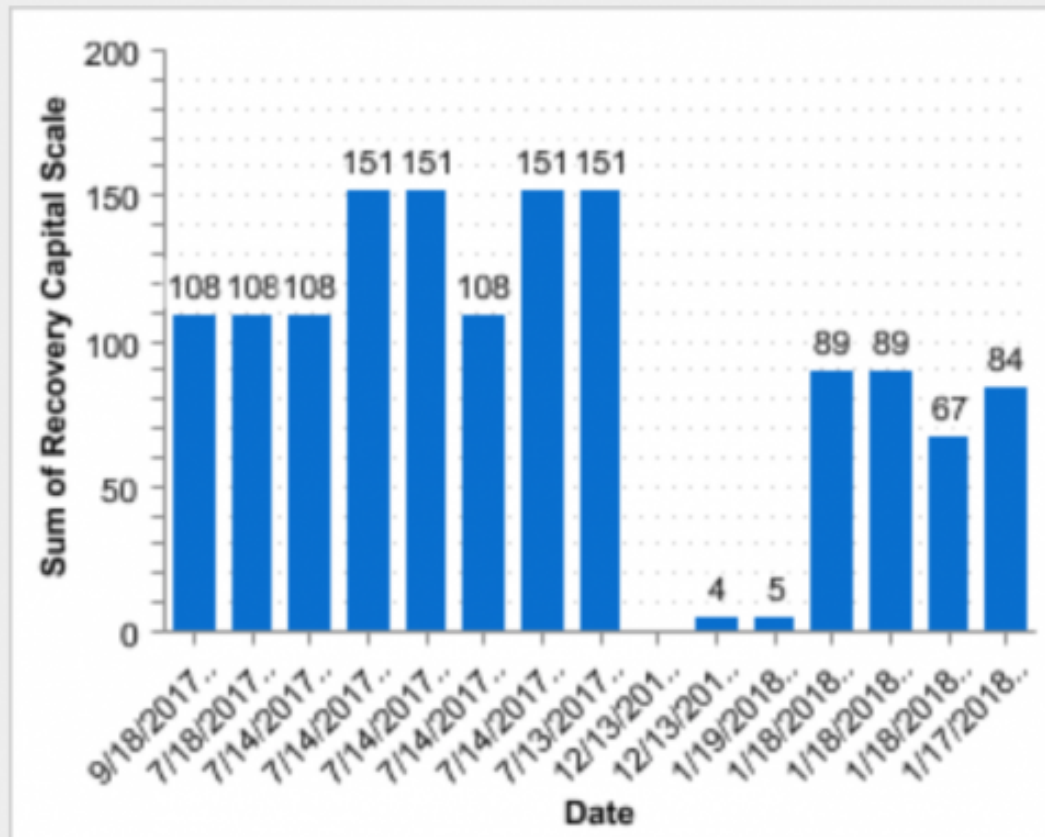
Report Generation Status: Complete

Report Options:

[Run Report](#) [Hide Details](#) [Printable View](#) [Export Details](#)

Generated Chart:

[Large](#) | [Medium](#) | [Small](#)



Generated Report:

Filtered By: [Edit](#)

Form Type equals **Recovery Capital Data** [Clear](#)

[Participant: Name](#) [Form: Form Name](#) [Recovery Capital Scale](#)

Date: 9/18/2017-05:54:10pm (1 record)

108

[Jane Bond](#)

[Form-76](#)

108

Date: 7/18/2017-05:25:37pm (1 record)

108

[James Bond-Test 2](#) [Form-131](#)

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In the event that your organization needs to build custom reports, please reach out to rdp@facesandvoicesofrecovery.org. We are able to work with your organization to identify the best solution.