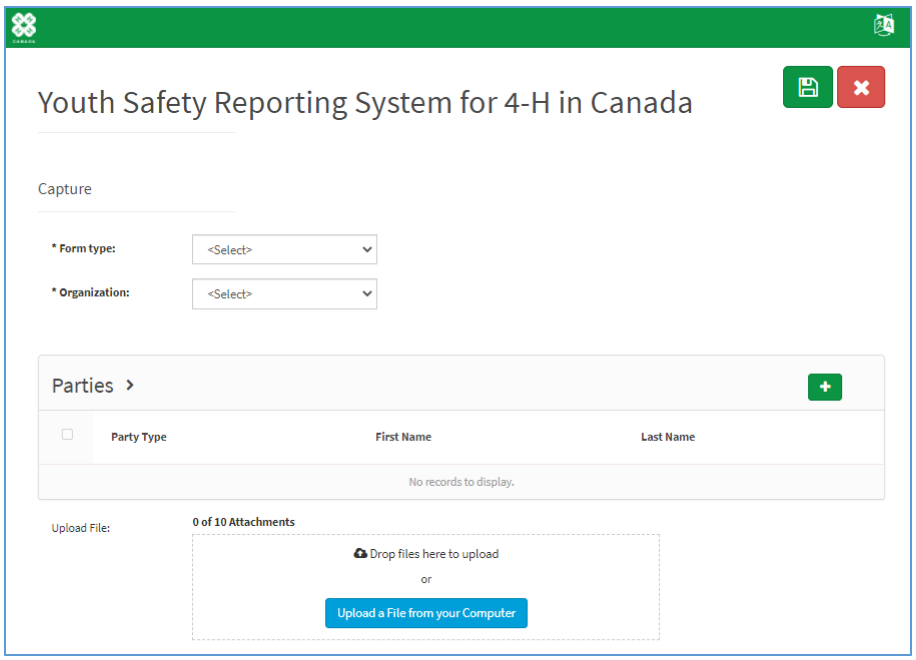
4-H i-Sight System

Admin User Guide

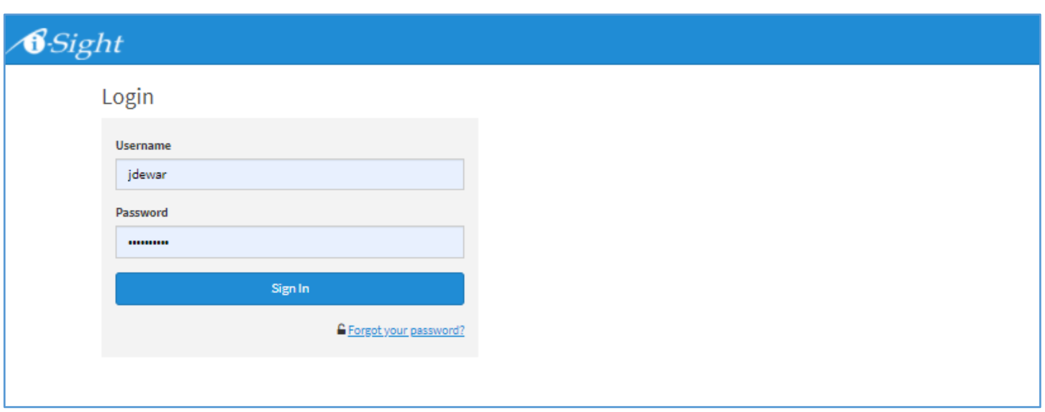
Overview

As an administrator, you have been given a userID on the i-Sight system. There are two interfaces into the system:

The **Youth Safety Reporting System for 4-H in Canada webpage** (4-h-canada.i-sight.com/external-capture) is where leaders can submit Incident Reports and Activity Plans. They do not require login credentials, in fact, even parents or the public can submit a concern they observe. The form will be directed to the correct province based on the organization selected.



The **4-H i-Sight webpage** (4-h-canada.i-sight.com/login) is the administrative portal for managing the Incident Reports and Activity Plans. A userID is required to access this part of the Youth Safety Reporting System.



Forms vs Cases

When an Activity Plan or Incident Report is submitted through the external webpage, a case is created in the i-Sight system to hold the form. In the 4-H system, there is only one form in a case, so you may find the terms are intermixed.

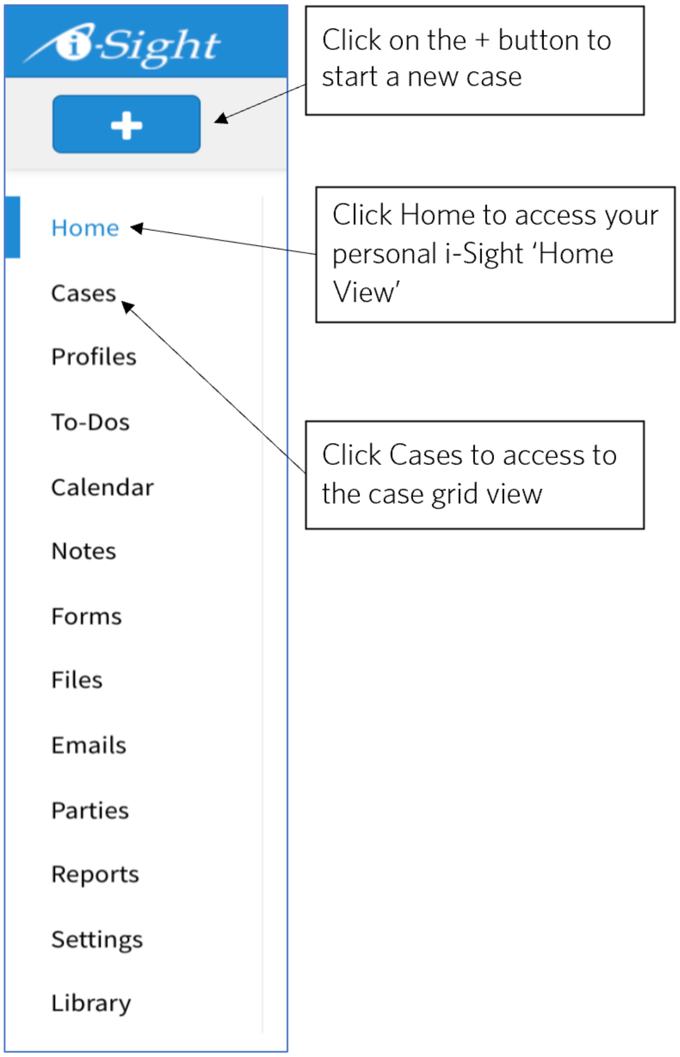
Other Form Types

4-H has four different forms in i-Sight, but only the Activity Plan and Incident Report can be submitted by leaders on the external webpage.

As an administrator, you may fill out any of the following types of forms. Please consult with your provincial director on how you might make use of the Inquiry or Risk Assessment form.

- Activity Planning Form
- Incident Report Form
- Inquiry Form
    - New Adult Volunteer
    - New Youth Member
    - Other
- Risk Assessment Form

System Navigation



Refer to the i-Sight User Manual section on System Navigation for guidance on how to customize the layout.

Creating a Case

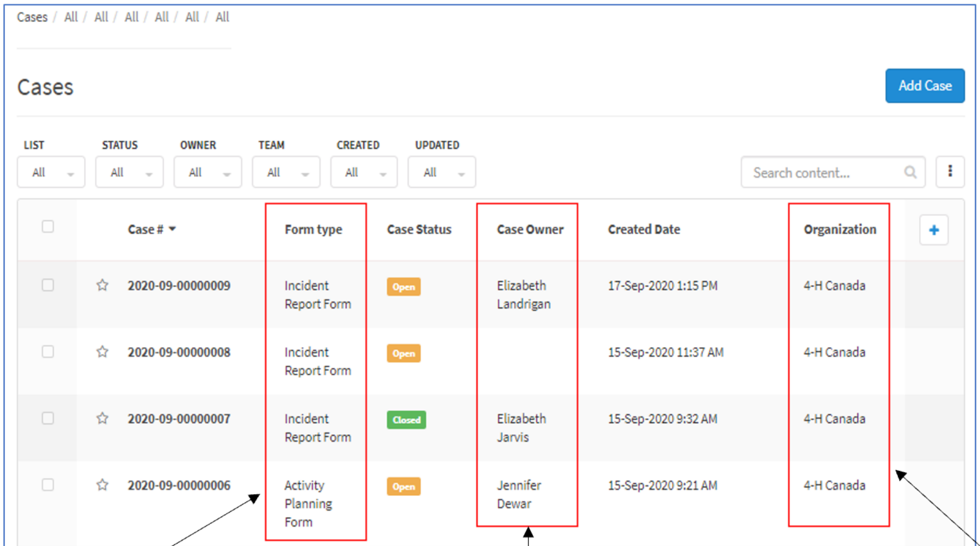
1. To create a case, click the + button in the upper left corner of the page. The New Case page will look similar to what leaders or parents would see on the Youth Safety Reporting System at 4-H in Canada webpage.
2. Select either Activity Planning Form or Incident Report Form
3. Select your organization.
4. Fill out the form (refer to the Quick Reference Guides for additional information about the form fields)
5. Click Submit at the top of the page.

Note: The case will automatically be assigned to you.

Note: do not add the email associated with your iSight userID to any of the Parties (simply leave the email blank if you are the staff member submitting an activity plan for a regional program or if you were the staff supervising at a program where an incident occurred). iSight will consider this a conflict of interest and will automatically block you from seeing the case. Please follow up with your provincial director if this occurs.

Case Grid View

This the most useful layout for seeing an overview of your current cases.



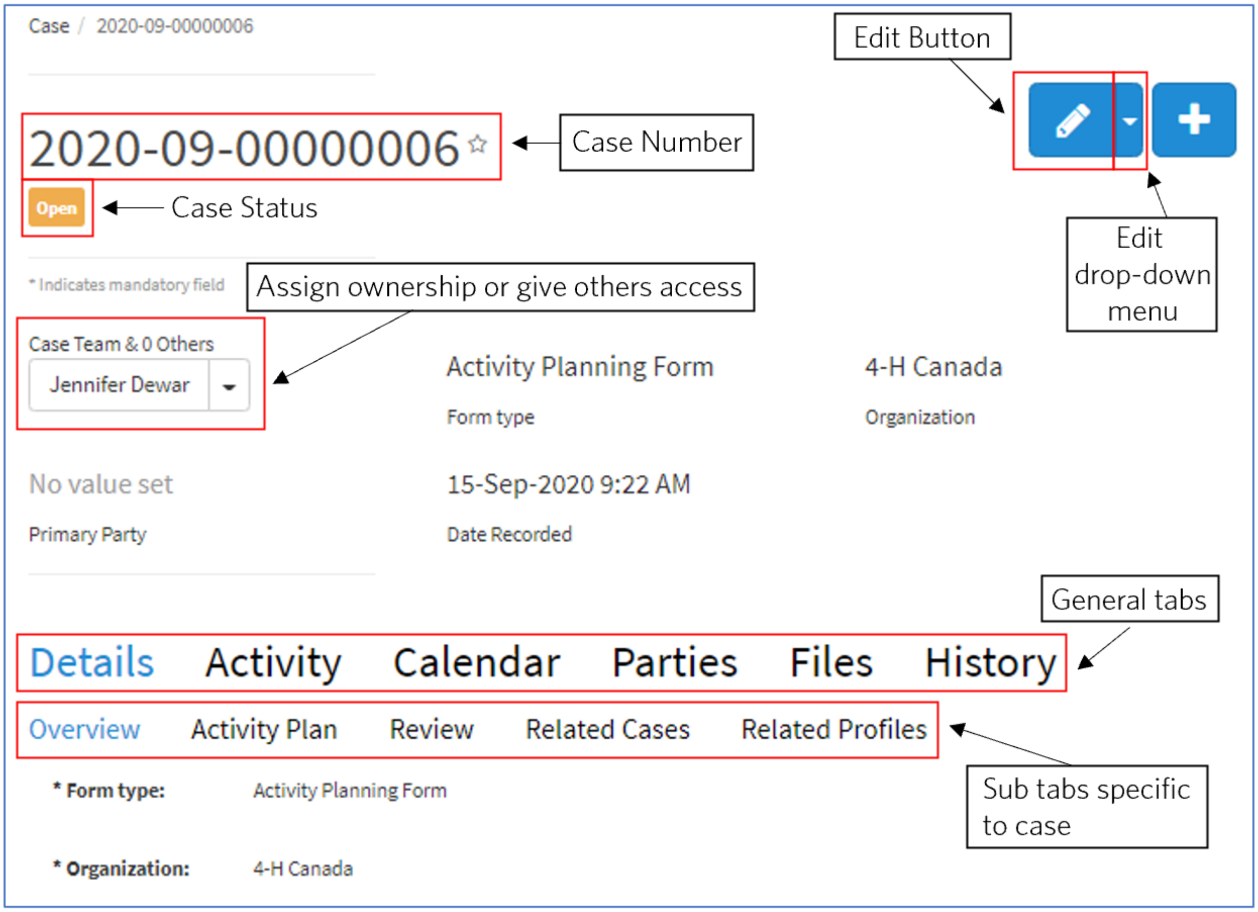
You will only see cases for the Form type your organization has given you access to.

Cases without an owner have been recently submitted through the website.

You only have access to the cases associated with your provincial organization.

Refer to the i-Sight User Manual section on Grids and Cases View for guidance on how to customize the layout.

Case View


Case / 2020-09-00000006
Edit Button
2020-09-00000006
Case Number
Open
Case Status
* Indicates mandatory field
Assign ownership or give others access
Edit drop-down menu
Case Team & 0 Others
Jennifer Dewar
Activity Planning Form
Form type
4-H Canada
Organization
No value set
Primary Party
15-Sep-2020 9:22 AM
Date Recorded
General tabs
Details
Activity
Calendar
Parties
Files
History
Overview
Activity Plan
Review
Related Cases
Related Profiles
Sub tabs specific to case
* Form type:
Activity Planning Form
* Organization:
4-H Canada

Receiving a New Case

Assigning ownership

- **Note:** If you created the case in the admin system it will automatically be assigned to you. If it was submitted through the public website, a case owner should be assigned.
- Open the case ownership drop-down. It is the arrow to the right of the Case Team field.
- If you will be following up on the case, assign it to yourself:
    1. Select Assign Case Owner
    2. Select your name
    3. Click Save
- If there is a conflict of interest and another user should not have access:
    1. Select Manage Team
    2. Select the Denied Access tab
    3. Search on the user's name
    4. Click the Add to Denied Access List button

Incident Reporting

Marking confidential

- On the main case view, select the pencil drop-down > Mark Confidential
- Note: Once marked confidential, only the provincial Form Manager will have access. You can still add 4-H Canada to the confidential cases

Adding 4-H Canada to report

- If it needs to be reported to 4-H Canada, add Jennifer Dewar or Elizabeth Jarvis to the investigation team

1. Open the case ownership drop-down. It is the arrow to the right of the Case Team field.
2. Select Manage Team
3. Select the Investigate Team tab
4. Search for the user's name
5. Click the Add to Team button

Making edits or notes

- Assign yourself if you've not done so. See the Assigning Ownership steps above.
- On the main case view, click the pencil button. You may edit the fields as needed to provide additional information
- **Note:** all of your actions will be tracked under the History tab
- On the Details tab, select the Incident Report tab to review the form that was submitted
- On the Parties tab, you can see details of all involved in the incident

Documenting outcome

- On the Details tab, select Resolution
- Clicking Yes to any of the questions will open additional fields for comment

- Complete fields as appropriate

Linking duplicate or related incident reports

1. On the Details tab, select Related Cases
2. Click the Link Case button at the side of the page
3. In the pop-up enter your criteria (i.e. case number, name) and click the Search button
4. In the list below select a case (select highlighted area, clicking Case # will open the case)
5. Describe the reason for the link and click Add Link
6. If appropriate, Close one of the Incident Reports and keep all the details in one. Note: it will show in both Incident Reports that they are linked.

Generating an Incident Report document

- Ensure you have approval to share the incident report details before generating the document or emailing details from within the system. All actions on the case are tracked on the History tab.

1. Click on the Files tab and click the Add File tab on the left
2. From the Kind drop-down, select Generated Template
3. Select English for Local
4. Select the Incident Report template.
    - When generating an Incident Report, it may be relevant to include information recorded in the Notes, To-Dos, Interviews, Parties and Policies. Select the relevant sections.
5. Scroll back to the top of the page and click the Save button. The generated file will be added to the Files list.

Closing an incident report

1. On the main case view, select the pencil drop-down
2. Select Close the case

Cancelling an incident report

- Incident reports may be submitted by the public. After investigating, if it was submitted in error or is a duplicate, it may be cancelled.

1. On the main case view, select the pencil drop-down
2. Select Cancel the case

Activity Planning

Viewing attached files

- The staff or leader planning the event may attach additional documents. Be sure to review those.

1. Click the Files tab and review the documents that were submitted.

Sending and receiving emails from a leader

1. Open the Parties tab and the info about the planning leader.
2. Copy the planning leader's email address
3. Open the Activity tab > Emails > Add Email
4. Paste their email address into the Send To field
5. Open the Standard Response drop-down and select Reply Instructions. Add additional test for the email into the Body field.
6. Attach a file from case if needed.

** if the leader replies to the email, the incoming email will automatically attach to the case in i-SIght

Receiving emails or documents

1. You can email directly into the i-Sight system (from a 4-h email domain only) and it will be attached directly to the case.
2. The case number must be at the start of the Subject line and the email sent to inbox@4-h-canada.i-sight.com
3. To view the emails, open the Activity tab > Emails

Making edits or notes

- Assign yourself if you've not done so. See the Assigning Ownership steps above.
- On the main case view, click the pencil button. You may edit the fields as needed to provide additional information
- Note: all of your actions will be tracked under the History tab
- On the Details tab, select the Activity Plan tab to review the form that was submitted
- On the Parties tab, you can see details of the leader that submitted the plan

Updating status

1. On the Details tab, select the Review tab.
2. Click the pencil to make the case editable.
3. If you've determined that the Activity Plan meets the standards outlined in the Youth Safety at 4-H in Canada Policies and provincial procedure, then Approve the plan.
   - Add the date and select the appropriate status
   - Add any additional comments

Generating Activity Plan document

1. Click on the Files tab and click the Add File tab on the left
2. From the Kind drop-down, select Generated Template
3. Select English for Local

4. Select the Activity Plane template.
   - When generating an Activity Plan to send to the leader (and for parents), you will not need to include any of the Notes, To-Dos, Interviews, or Policies. Do select the Trained Leader / Staff from the Parties.
5. Scroll back to the top of the page and click the Save button. The generated file will be added to the Files list.

Emailing the Activity Plan document

1. Open the Parties tab and the info about the planning leader.
2. Copy the planning leader's email address
3. Open the Activity tab > Emails > Add Email
4. Paste their email address into the Send To field
5. Click on Select a File from this Case
6. Click beside the file(s) you'd like and click done.

Closing an activity plan

1. On the main case view, select the pencil drop-down
2. Select Close the case