CREATING & MANAGING COHORTS USER GUIDE

SDQcohort

**SDQ
cohort**

Introduction

SDQcohort is a web-based application created and maintained by Youthinmind. A cohort may be a school class or year group, a clinic, patient or client list etc.

A PlusIID (system generated, unique individual identifier) is assigned to each young person listed in the cohort, to which all SDQ assessment data is linked. It is entirely your decision as to the personal details you use to identify and match an individual to their PlusIID.

Compatible browsers include Chrome, FireFox, Microsoft Edge. This guide uses Chrome.

The Youthinmind team is grateful for your feedback on this user guide. Let us know how we can improve this user guide by emailing us at sdqtraining@youthinmind.com.

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Accessing SDQcohort

1. Login with your UserID and Password https://sdqscore.org/SDQcohort.html.

Click *hide* if you do not want your password displayed on screen.

SDQ cohort User ID: [   ] Password: [   ] hide

2. Click the *Check status* button*,* a tick signifies the login details are correct.

Check status ✓ Logout

Creating a Cohort

For small cohorts, or to add a new child to an existing cohort, we would advise using the **manual method**. For large cohorts (or for children with an existing PlusIID (system allocated, unique individual identifier)) use the **import method**.

Before you begin it is important to consider what to use for Details 1 (sort field) and Details 2 to help you identify each child/young person against their system allocated PlusIID. For data protection this information is encrypted within the system. Each cohort name is linked to the UserID login details, therefore, only users with correct UserID, password and cohort name can access the cohort (we have no way of seeing or retrieving cohort names).

PlusIID format

Numerical ▼
Human-Friendly
Numerical

The default setting for the PlusIID is *Numerical* format (16 digits). A more memorable PlusIID in *Human friendly* format can be generated using the drop-down arrow <u>before</u> you start creating records.

- Example of a Numerical PlusIID (default): 4559-6041-2502-9392
- Example of a Human Friendly PlusIID: enabled.bee.4579

The same PlusIID should be kept for an individual child, otherwise assessment results will be split between two accounts.

Cohort Creation - Manual Method

1. Login then type in your chosen cohort name into the cohort name box and click *Load remote cohort.* Remember the <u>exact format</u>; you will need it to retrieve the records you create (see information box).

eck status ✓ Logout

Search cohort

[...   ]

Save row   Clear row

[   ]   Reset filters

Remote cohort storage function

Note to those subject to European Union General Data Protection Regulation (GDPR). The storage of strongly encrypted personal data by us in a way that we cannot possibly decrypt it should qualify as "data protection by design". If you have any reservations about our approach, please contact us or do not use this application.

Note to users of this remote cohort storage function. If you forget your cohort name, we have no way whatsoever of advising you of it. It is not possible to decrypt or identify your cohort without the EXACT cohort name and UserID (including capitalisation)! We recommend you manually record all details to permit recovery, as well as using the provided "Backup cohort" function.

Cohort name: [graduation.years1]

Load remote cohort

If the cohort name is free to use <u>nothing will happen.</u>

If, however a cohort with this name exists, two ticks appear and the records appear on screen.

Change the PlusIID to Human-Friendly if you prefer this format to the numerical version.

INFORMATION: As data processor, Youthinmind is not allowed to view personal data and we are not able to recover lost cohort names. This is to comply with data protection regulations. You should backup your cohort and keep the backup spreadsheet in a secure place.

2. Type the relevant information into Details 1 and Details 2 fields (Details 1 is the primary sort field).

3. Click *Save record.*

If you did not assign a cohort name, as instructed in step1, a prompt box will instruct you to do so.

The first record now appears in row 1 of the cohort (this order will change as you add more records - numerical order precedes alphabetical order).

4. Continue to add children's details to the cohort as described in steps 2 & 3.

5. This method can also be used to add children to an existing cohort (just make sure you load the cohort first as in step1).

Backup Cohort

1. Before logging out, make sure you click the *Backup cohort* button and download the Backup spreadsheet detailing the PlusIIDs against the details entered.


Once allocated a PlusIID must be retained to ensure that a child's SDQ results are correctly stored.

2. The Backup spreadsheet also records the UserID and cohort name within the filename. It is not saved on the system, **so store it safely on your own device**.

 The backups can be used to import records into other cohorts or to rebuild cohorts if you accidentally delete a record.
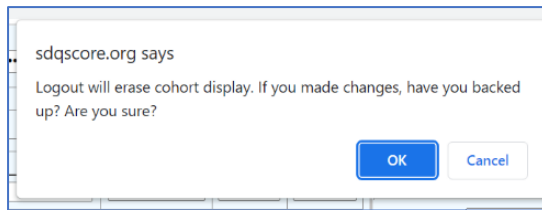
3. If you add additional records to an existing cohort always remember to backup before you logout. A warning message reminds you of this on logout. If you are confident you have a record of all the PlusIIDs in the cohort click *OK*.

Cohort Creation - Import Method

1. First prepare the spreadsheet (must be xlsx file e.g., Excel or Google sheets) ready to be imported. You must use the headings, **Field0** and **Field1** in columns A and B respectively. Exact formatting is required, i.e., capital F, no space between the d and the number, otherwise the import will not load. Only use sheet 1 (additional worksheets will not import).


Field0 is the sort field (appears as Details 1 within SDQcohort) – numbers precede letters.

Existing PlusIID?

In the example screenshot two children (rows 6 & 7) have existing PlusIIDs. These have been recorded (exact formatting) under the heading PlusIID in column C. This ensures that they retain their PlusIID and any stored SDQ assessment data.

If there are no existing PlusIIDs you do not need to include this heading in column C.

2. Save and close the spreadsheet.

3. Login to the SDQcohort application with your UserID and Password.

4. Click *import a file.* Click *Choose file (*or *browse* if using FireFox*).
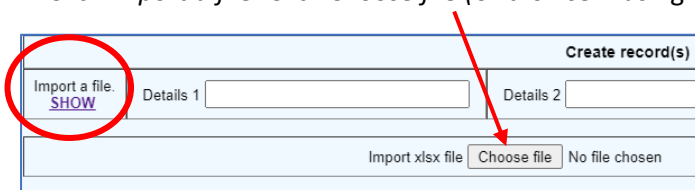
5. Locate the prepared spreadsheet and double right click on the filename to import into SDQcohort.

6. Type the cohort's name into the *Cohort name* field and click *OK*. This acts as a key that only you will know; you will need to remember the exact format entered to retrieve the cohort in the future. It cannot be recovered as it is not stored on the system (see *Information* on page 2).
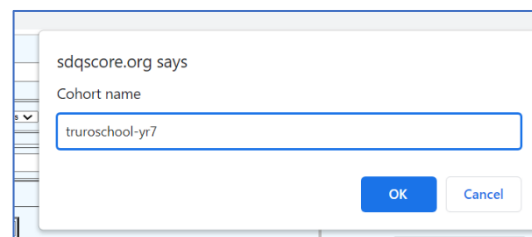
7. When the cohort has fully loaded click the *Save imported cohort* button to save the records.
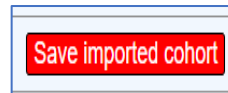
8. Once you have finished adding to the cohort use the *Backup cohort* tool to download a spreadsheet detailing the PlusIIDs against the details entered (more details on page 3).

Once allocated a PlusIID must be retained to ensure that a child's SDQ results are not lost.

9. To import or create a 2nd cohort, logout to clear the screen and start the process anew.

Retrieving a Cohort

1. In the Cohort name field type in the cohort name (must be exact) and click *Load remote cohort.* Two ticks appear and the cohort will appear on screen.

Editing & Deleting Records

### Editing

To edit information in Details 1 and Details 2, click on the pencil image in the relevant child's row.

The Edit record box will appear – make any changes by clicking in the relevant entry field to activate the cursor. Click *Save Edit* to update the changes. You cannot edit the PlusIIDs.

Deleting

Proceed with caution! Clicking this button when all records are checked can delete the whole cohort!
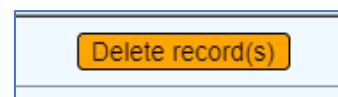
To delete a record(s) first check the relevant check box within the child's row (the top check box next to N checks or unchecks all).

Then click *Delete records* and click *OK, OK*.

Adding New Records to an Existing Cohort & Copying Records to a New Cohort

You can have a child's record existing in more than one cohort, e.g., you may have an individual in a year group cohort and also in a therapy group cohort (same PlusIID in both). Any SDQ assessment data will automatically be uploaded to the PlusIID that is recorded in both cohorts.

For a Small Number of New Additions use the Manual Method
The simplest way to add a new record (for a child without an existing PlusIID) is to login, load the cohort and then use the Details 1 and Details 2 boxes to add the information about the child, then click Save row. Refer to pages 2-3 *Manual Method* if you are unsure.

Adding Records, Copying Records or Renaming Cohorts - Import Method

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INFORMATION – Please read before you begin.

BACKUP: It is essential that you take a backup of your existing cohort and save it safely (this can be used to rebuild a cohort, should there be any problems). Make a copy of the backup spreadsheet and save it with the name you propose to use for your new cohort - you can then add or change these spreadsheet records before import (check your downloads folder if you cannot locate it).
Taking a backup is essential – if anything goes wrong you can use a backup to reinstate the original cohort.

NEVER CHANGE A PLUSIID – the system uses this to save data results to the correct child's record; likewise, if you only record the details in Field0 and Field1 and omit a previously assigned PlusIID the system will generate a new one resulting in the child's assessment data being split between two records.

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1. To add new children's records fill in the details on the backup spreadsheet under column headings, Field0 and Field1, but leave the row in column C blank (the system will automatically generate a new PlusIID on import).

Only sheet 1 will import. Remember where you have saved the spreadsheet and close it.

	A	B	C	D
1	Field0	Field1	PlusIID	
39	2027	Botherall, Andrea M	enabled.bee.4579	
40	2027	Brown, Billy	novel.lion.5551	
41	2027	Brown, Everton P	1095-7981-2709-1711	
42	2027	Dickson, Sandy	5539-3508-7470-0816	
43	2027	Kahn, Robbie P	1439-3031-2338-0490	
44	2027	Score, Christopher Ray	5099-9332-7488-9281	
45	2027	Sidney-Graham, Tina	1214-5429-1291-0936	
46	2028	Best, Georgia P	smart.tadpole.943	
47	2028	Best, Gina	1551-0597-8191-8043	
48	2028	Charlton, Ben M	sought.liver.5053	
49		2026 Phillips, Anthony		
50		2026 Washington, Aidan		
51		2029 H.D		
52				
53				
54				
55				

SDQcohort_PlusIIDs_graduation.y

A. Retaining the same cohort name

To retain the same cohort name (i.e. add records to an existing cohort) you will need to load the cohort on screen before you start the import process.

In this instance it is easier to just have the records you want added to the cohort listed on your spreadsheet under Field0 & Field1, however, PlusIIDs that are recorded within the existing cohort and on the spreadsheet will be retained.

B. Renaming Cohorts

If you wish to assign a new name to the cohort do not load the existing cohort on screen.

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2. Login to SDQcohort (refer to option A or B above).
3. Click *Import a file Show* – the Import xlsx file tools will then appear.
4. Click *Choose file* (may be labelled Browse if using FireFox).

5. Locate the spreadsheet and double left click on the filename to start the import.
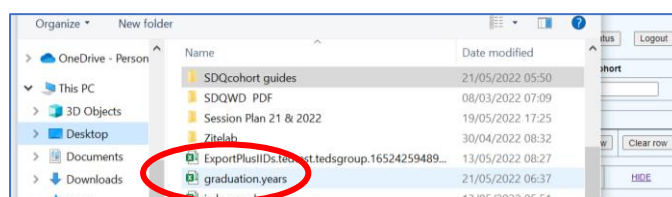
6. Enter the cohort name in the *Cohort name* field and click *OK*.

7. Once the cohort has finished loading, click the *Save imported cohort* button and *OK* in the dialog box to save the cohort.

8. Click the *Backup cohort* button and save the spreadsheet safely on your own device. When complete clicking *HIDE* will remove the extra tools from view.

Deleting records from the original cohort
If you have copied records from an existing cohort to a new cohort and you wish to remove a record from the original (see page 5):
First select the records for deletion (the top tick beside the N deselects or selects all records).

Then click the *Delete records* tools to remove the unwanted records from the original cohort.

Other SDQcohort guides include:
Generating & Scoring the SDQ User Guide
SDQ Assessment Results User Guide

For advice or assistance please email us at,
sdqtraining@youthinmind.com