

### Using Upshot for COVID-19 response work

**\*\*Updated August 2020\*\***

**Upshot** is used to manage projects which give vital support to communities and vulnerable individuals. We are aware that many organisations using the system may face new challenges due to the COVID-19 pandemic. This guide aims to explain some ways Upshot can be adapted or used to help you meet these challenges.

Upshot Support is operating as normal – if you need any help with managing your work please contact [support@upshot.org.uk](mailto:support@upshot.org.uk) or call 020 7842 8899.

Specific areas in this guide include:

#### [Using Upshot for tracking and tracing participants](#)

##### Identifying vulnerable service users

- [People report](#) – using filters to identify vulnerable individuals e.g. by age or medical condition.
- [Custom Attendee Fields](#) – to allow you to easily identify individuals who may need support.
- [Map](#) - to view population density by age and health data in the areas you cover.

##### Communication to service users

- [Emailing](#) – using the inbuilt email tool to communicate changes/updates on how your organisation is working.
- [Media](#) – using the media library to share information quickly and securely.
- [Surveys](#) – gather information directly from your attendees or your general community.

##### Changes to Delivery & Collecting new types of information

- [Sessions](#)
  - Adding [Session Tags](#) to indicate new purposes for new or existing sessions.
  - Adding [Additional Session Information](#) to show on the **Public Calendar**.
  - Adding [Notes](#) (to sessions or individuals) when completing registers.
  - Recording [abandoned sessions](#).
  - [Deleting sessions](#).
  - Adding a new [Location](#) to record remote delivery.
  - Adding [Head Count](#) sessions for recording your help to people not registered with you.
- [Activities](#) - Distinguish new or extended services provided in response to COVID-19 through adding new **Activities** or **Activity Groups**.
- [Timeline Events](#) – add milestones or events to track changes related to the crisis.

##### Registering New Participants

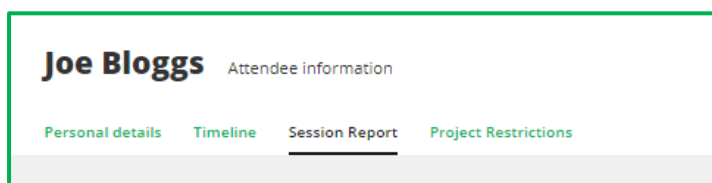
- [Attendee Sign up Form](#) – to register new participants to the system remotely.

## Using Upshot for tracking and tracing participants in your programmes

If you are returning to delivery Upshot can be used to support tracking and tracing participants in your programme.

By keeping on top of registers once you are delivering you can use the reporting tools to aid you in this process.

As a first step, if you simply need to find out the sessions and activities one individual has attended recently, this can easily be done from the **Session Report** on their profile.



An **Attendance Report** based on this can identify which other participants the individual may have encountered at certain sessions.

Your choices				
Project	Sport Project			
Session status	Past sessions - submitted			
Start date	01/07/2020			
End date	17/08/2020			
Attendee types	Participant			
Displaying data for	Attendee type			
			Project	Sport Project
			Activity group	
			Activity	Gymnastics
			Title	
			Location	DEBEN LEISURE CENTRE
			Location ID	4672
			Date	05/08/2020
			Start time	15:00:00
			Duration (hrs)	1
			Status	Complete
			Session ID	73565
			Session notes	
First name	Last name	Nickname	Attendee ID	
John		Travolta	134118	Participant
John	Beecroft		103737	Participant
Emma	Bunton		92326	Participant
James	Carol		92347	Participant

The **Attendance** or the **People Report** could then be used to find individuals who may have used the same physical spaces subsequently.

Once you have identified relevant individuals, if you hold contact details for these participants these can be accessed individually on their profile, or for a larger group via the **People Report** download.

### Identifying vulnerable service users

We are aware organisations may look to identify where their resources and efforts should be based in terms of individuals most in need and specific locations that may require additional support.

#### People Report

The **People report** allows you to identify individuals and communities most in need of support, using filters such as age, medical conditions etc.

It can also be used for urgent admin tasks such as identifying attendees who do or don't have emergency contact details in place.

Once the filters are chosen you can download the details of attendees who match the selected criteria into a spreadsheet. This download can be useful for response teams either digitally or as a print-out.

You can also choose to **Email** these attendees directly (e.g. to quickly inform them of changes such as moving to online).

#### COVID-19 Example

Identify attendees who are at risk – e.g. over 70 and have specific medical conditions (see screenshot below).

**People report**  
Choose the people you want to see information about

RESET

**People** —

Active or Archived?  
Active only

Age 70-115

Gender  
All  
clear

Specific medical conditions  
All  
Asthma  
clear

In addition, to save yourself time, you could also create your own Attendee Data Field (please refer to the section on **Custom Attendee Fields** below) such as *COVID-19 support required*. This would allow you to filter your People Report using this to easily identify relevant individuals.

Please refer to the [People report](#) guide for more information.

#### Custom Attendee Data Fields

You can create your own **Attendee Data Fields** alongside the standard ones in Upshot. Go to **Admin > Attendee Data Fields**. Here you can **Add a new data field** for extra information you may collect via your registration form or via head count sessions. This new field can be any kind of information you

collect. In the current situation this field can be used to help identify individuals that need additional support quickly and easily via your **People Report**.

### COVID-19 Example

Create your own custom field called for example **COVID-19 support required**. This can help to identify individuals that need this additional support quickly and easily on your account.

**Note: If data such as this needs to be added to a large number of attendees this can be done via a Bulk Edit. Please contact [support@upshot.org.uk](mailto:support@upshot.org.uk) for assistance– it can save a lot of vital time.**

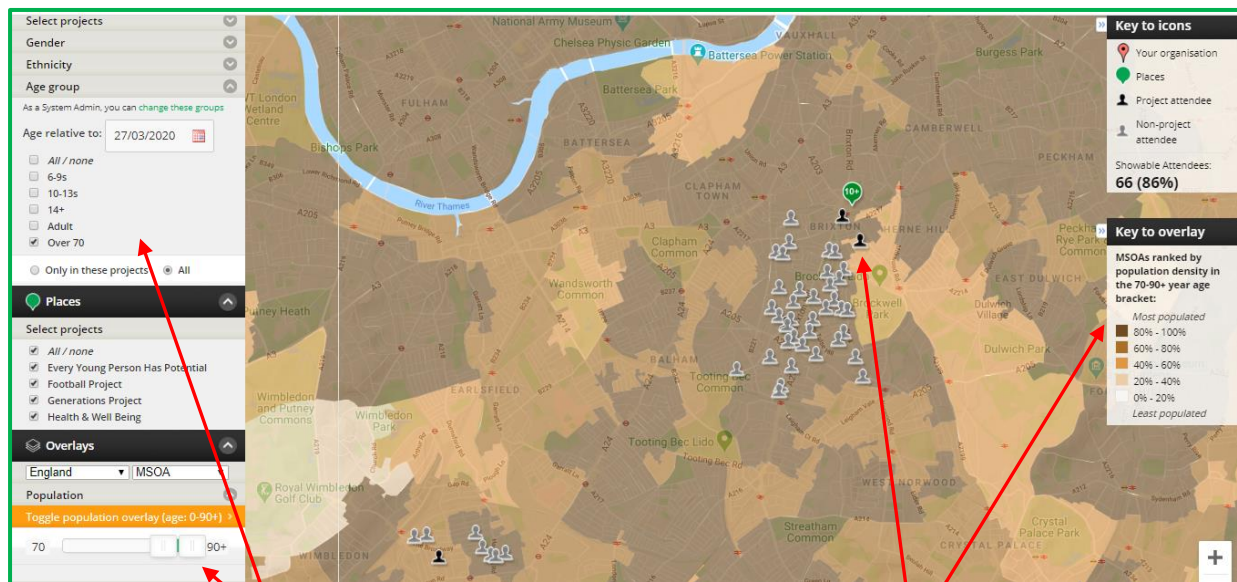
Please refer to the [Admin guide](#) for more information.

## Map

The **Map** plots all attendees and locations according to their postcodes. **Overlays** can be applied to view where they are in relation to the Index of Multiple Deprivation and Population density. All data is taken from the Office of National Statistics and the overlays can be broken down into **Lower Super Output Areas, Medium Super Output Areas and Local Authority**.

### COVID-19 example

Filter your attendees (or all those on your database) to plot where those over 70 live – this is useful in co-ordinating volunteer support for example. Then add the overlay of population density to assess the relative risk level of those people aged over 70.



Use the filters on the left-hand side to select chosen **attendee** characteristics, geographical areas and **overlays**.

The keys on the right show the relative values depending on the selected filters and overlays. Attendees are shown as black figures when they have previously registered for your activities and grey if not yet engaged, but on your database.

### Communication to Service Users

In difficult times, clear and easily accessible communication is essential. Upshot consolidates all data in one place and enables quick accurate sharing of information. The **Email** and **Media** features are highlighted below.

#### Email

Upshot has an inbuilt **email** tool. This will allow you to communicate on mass with service users any changes to your delivery, opening or contact hours in the current pandemic. In addition, emailing individual users can be a vital way of tackling social isolation during this period.

#### COVID-19 Example

Use the **People report** to define the list of attendees you would like to email – e.g. all those suffering from *Asthma* and email them directly with the latest health information and your support services. You can also go directly to the **Email** option (under the **People** tab and then select recipients).

#### Media

Use the Upshot **Media Library** to store forms or documents, e.g. scanned documents, photos and videos. These can be then be downloaded, filled in and uploaded quickly. This enables you to maintain a central, shared file space for staff and volunteers, especially useful when working remotely.

Use appropriate tags such as COVID-19 and **Media Associations** to easily identify these files within the **Media Library**.

#### COVID-19 Example

Documents such as forms which need to be filled in, can be shared via the media library. These are then, for example, accessible to volunteers in the field providing urgent services. Documents can also be printed, edited, scanned and re-uploaded to the **media library**.

Please refer to the [Adding Media](#) guide for more information.

#### Surveys

Organisations might find it helpful to receive feedback from service users (or the wider community) at this time. This information could be collected via Upshot **Surveys**. Surveys on Upshot can be sent out via email to known participants or information could be collected via a **Public Survey Link** which anyone could access. Please refer to the [Creating Surveys](#) guide for more information.

#### COVID-19 Example

An organisation creates a survey to be sent to individual service users to find out their needs in this period so they can adapt delivery and try to meet these where possible.

### Changes to Delivery & Collecting new types of information

Delivery may continue for your organisation during the COVID-19 pandemic, if so, continue recording in the same way.

In other instances, delivery may change (e.g. online rather than face to face sessions), new **activities** may be delivered, or you may need to record new types of information such as the needs phone calls or deliveries made. It is possible to identify this work within the activities and sessions that already exist if appropriate.

### Sessions

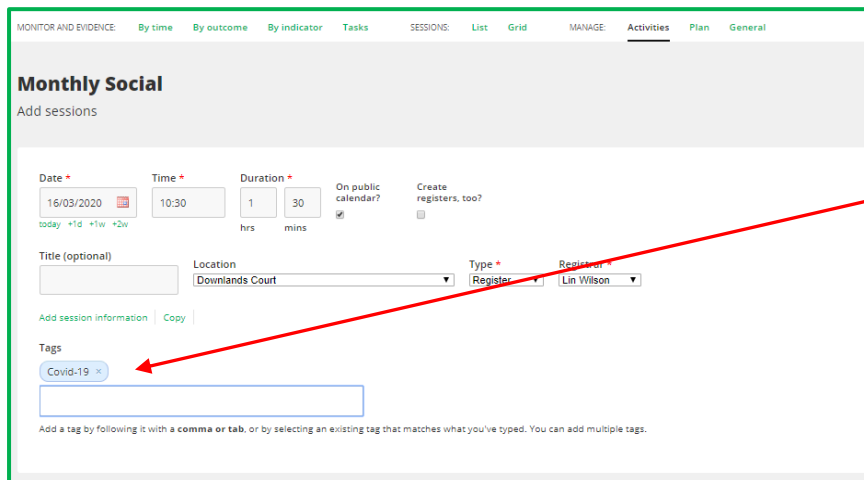
Please refer to the [Sessions](#) guide for more information on the options discussed below.

### Adding Session Tags

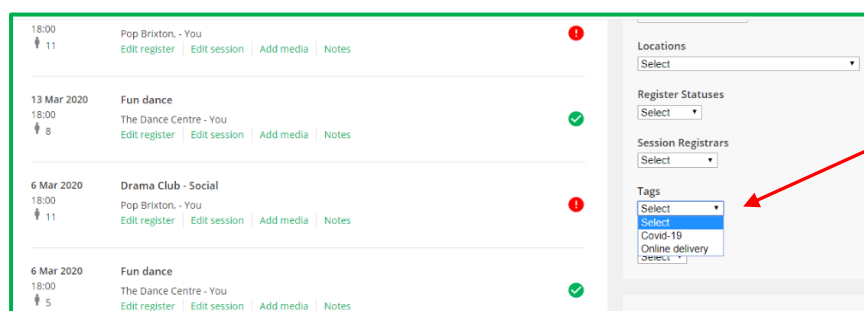
If existing **Activities** continue to run and the method of delivery has changed you might want to record this by using **Session tags** to identify these specific sessions (as opposed to those run for the same activity last month) that relate to your work on the COVID-19 Pandemic.

### COVID-19 Example

Add any **Tags** that will help you report or filter sessions. For instance, you could tag a community session with the fact that '**COVID-19**' information was shared. As an organisation you can agree a set of consistent tags that will be useful in reporting on the activities and sessions you delivered during this time, via the **Attendance Report**.



When creating or **editing sessions** add a **tag** from an existing list or create a new tag - new tags will then be visible to all.



Date	Time	Location	Registrar	Status
16 Mar 2020	18:00	Pop Brixton - You	You	1
13 Mar 2020	18:00	The Dance Centre - You	You	8
6 Mar 2020	18:00	Pop Brixton - You	You	11
6 Mar 2020	18:00	The Dance Centre - You	You	5

You can then filter on **Sessions List** view using the **Tag** filter on the right-hand side This filter only appears on the session view when tags have been used on at least one session.

## Adding Session Information to view on Public Calendar

When creating or editing existing sessions **Add session information**: can be used to provide additional details for your attendees/session leaders e.g. instructions to access an online session.

**Dementia Social**  
Add sessions

Date \* 02/03/2020 Time \* 12:00 Duration \* 2 hrs mins On public calendar?  Create registers, too?

Title (optional) Location NPL SPORTS CLUB Facility Unspecified Type \* Register Registrar Lin Wilson

Add tags: **Add session information** Copy

Ensure that for the specific session(s) you want to show on the calendar, the **Calendar** box is ticked.

If you want to share a live link to this **calendar** publicly or embed it on your website, you can copy the link from the **Tools** section in the calendar view.

**Employment Project** Wed 3 Oct 2018 - Wed 30 Nov 2022

MONITOR AND EVIDENCE: By time By outcome By indicator Tasks SESSIONS: List Grid MANAGE: Activities Plan General

**Calendar**

Last four weeks Next four weeks Last 12 months All **Calendar**

Sep 2019 today day week month

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	10:00 English Language Classes - Education Faringaye High School Employment Project		19:00 Multi Faith Football League - Sport - 5 a side Goals Bradford Employment Project			
	10:00 English Language Classes - Education Faringaye High School Employment Project		12:00 Clothing - Other Support City of Bradford Metropolitan District Council Employment Project			

Show all projects Reset

Activities Select

Activity Types Select

Activity Groups Select

Locations Select

Register Statuses Select

Session Registrars Select

Time Periods Select

**Tools**

Link to this calendar:  
<https://demo.upshot.org.uk/calendar/sess>

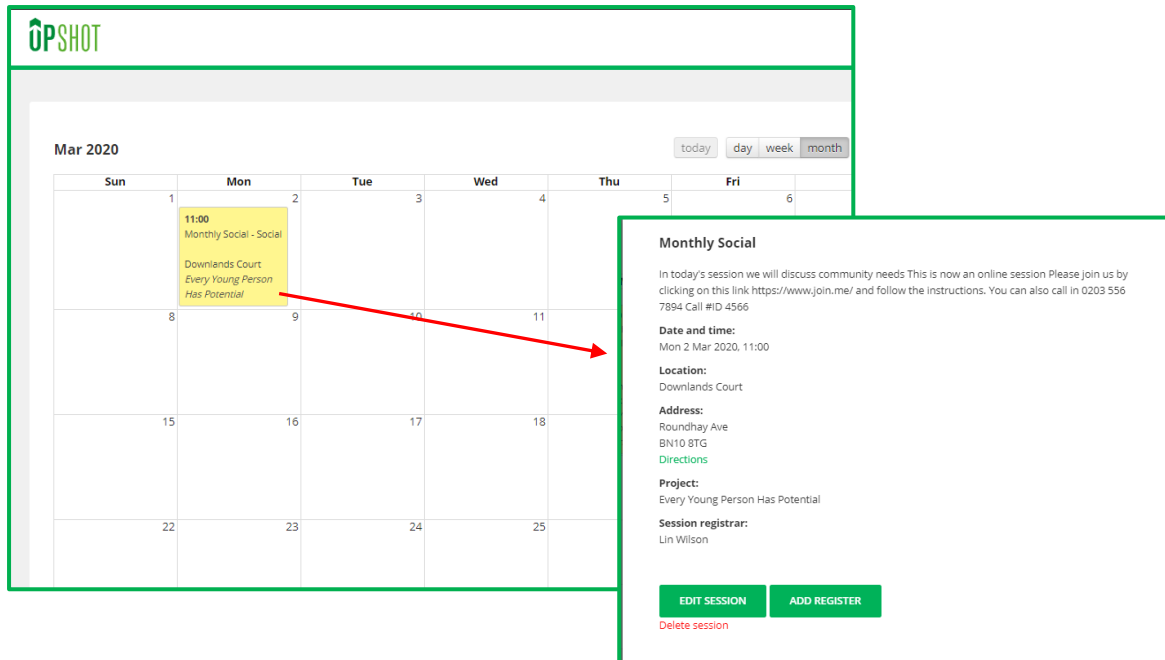
Link to this month's calendar:  
<https://demo.upshot.org.uk/calendar/sess>

This can be shared publicly using the session **calendar** which can be found under **Sessions > List > Calendar** tab.

This can be done on a per project basis or across all projects by using the Organisation Calendar which is found by going to **Project > Projects Calendar**.

### COVID-19 Example:

This session below informs attendees of the relevant information for their upcoming session – this could include web addresses, dial-in details etc.



The screenshot shows a calendar for March 2020. A session titled "Monthly Social" is scheduled for Monday, 2nd March at 11:00. The session details popup includes:

- Monthly Social**
- In today's session we will discuss community needs This is now an online session Please join us by clicking on this link <https://www.join.me/> and follow the instructions. You can also call in 0203 556 7894 Call #ID 4566
- Date and time:** Mon 2 Mar 2020, 11:00
- Location:** Downlands Court
- Address:** Roundhay Ave, BN10 8TG, [Directions](#)
- Project:** Every Young Person Has Potential
- Session registrar:** Lin Wilson
- Buttons:** EDIT SESSION, ADD REGISTER, Delete session

### Adding Notes (to sessions or individuals) when adding registers

Alongside recording who participated in a session, you may find it helpful to record additional information. This can be done either against the session overall or individual participants.

**Notes** on the **session** overall could be used to record the content of the session, how the session was structured, any online issues, group comments or any other additional information.

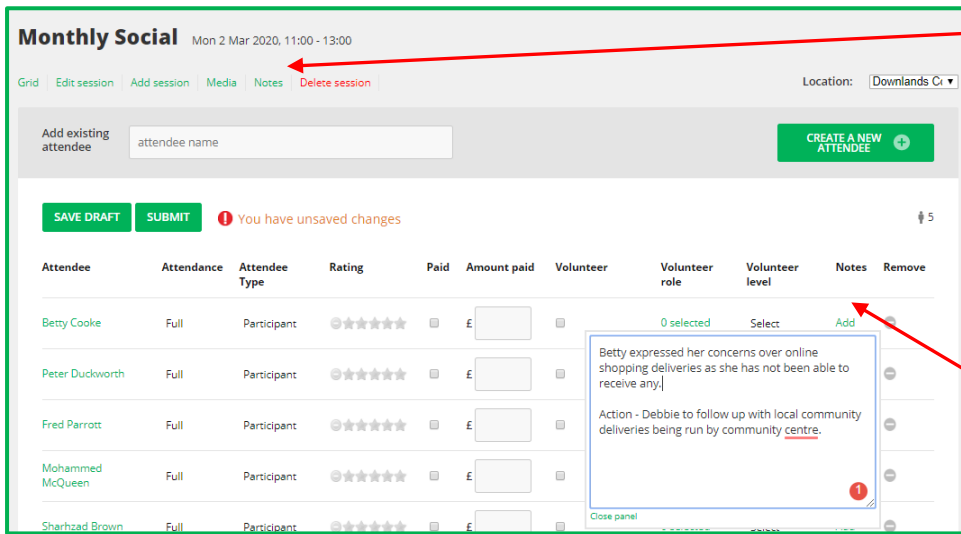
**Notes** on the individual attendee could detail any specific feedback or comment that individual had, or how you felt they interacted with the session.

Both types of notes can be reported on in the [Attendance report](#) by selecting **notes** and additionally the **Session report** for the individual.

### COVID-19 Example

Add comments or notes from individuals during a session to keep track of any issues with an online technology or as a group the agreed actions or needs within the community.





**Notes** pertaining to the session can be added here.

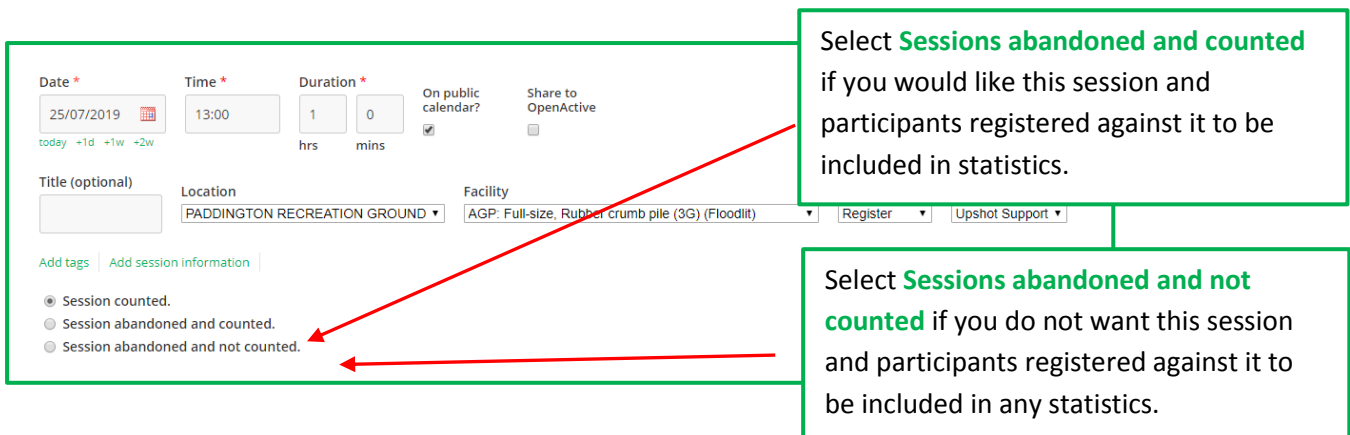
**Notes** pertaining to an individual can be added here.

## Recording abandoned sessions

During difficult times organisations are unfortunately likely to need to cancel or abandon sessions. The **Sessions abandoned** feature enables you to report on the sessions that have been scheduled but may not have taken place. To mark a session as abandoned, locate the relevant session from the Sessions List and click **Edit session**. There are two abandoned session options to choose from; **Session abandoned and counted** and **Session abandoned and not counted**.

### COVID-19 Example

An Outdoor Fitness session may have been scheduled but could not be delivered due to the COVID-19 Pandemic. However an organisation may still want to count the session in their statistics.



Select **Sessions abandoned and counted** if you would like this session and participants registered against it to be included in statistics.

Select **Sessions abandoned and not counted** if you do not want this session and participants registered against it to be included in any statistics.

Once you have selected one of the abandoned session options click **SAVE**. The session will appear on the **Sessions List** with a message related to the option selected.

You can also run an [Attendance report](#) to view your abandoned sessions.

### Deleting Sessions

Rather than abandoning sessions you may want to delete future sessions permanently.

#### COVID-19 Example

Future sessions that can no longer take place at a facility shut down by the pandemic. These sessions can be **deleted** individually from the Sessions **List** or on mass via **Edit draft sessions** and ticking the **Remove** Option.

### Adding New Locations

All sessions on Upshot are recorded against a **Location** and your list of locations can be added to at any time. Anyone with **Project Manager** access can add new locations by going to **Admin > Add Location**.

#### COVID-19 Example

Your delivery may now have changed and the existing location options in your account may no longer reflect the fact you are delivering *online* for example. Add generic locations such as *online*, *phone* etc.

There are several required address fields when adding a location. If not needed in your generic location these can be navigated by adding an asterisk or one character in those fields.

A valid UK postcode must be entered, and we would suggest entering either the postcode of the individual hosting the online session or your office postcode.

### Head count sessions for recording your help to people not registered with you

Head count sessions allow you to capture number of attendances without having the profile of people attending. Please refer to the Head count guide for more information.

#### COVID-19 Example

If you are providing services to new people not registered with you and they do not wish to be on your database, you can create a **Head count** session for each specific interaction and add notes if needed. It is also possible to record the gender of the person on that session, as well as other **attendee data field** information if created as a head count field.

### Activities

Organisations might start undertaking completely new **Activities** (*Delivery Service, Online Meetings*) during this period and new activities can be added at any time. These could sit under an **Activity Group** called **COVID-19** which would allow you to report on these activities all together or individually if you would prefer.

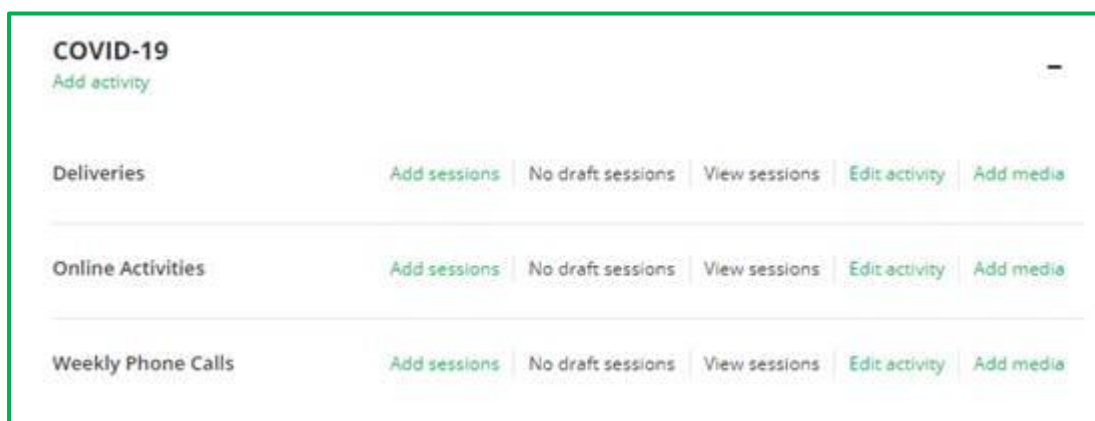
It might not be necessary to separate out all your COVID-19 related work into separate activities as above, so you could just input all sessions into one **activity** called *COVID-19 response* if you would prefer.

Both these options can sit within your existing Upshot projects if relevant.

Do get in touch with the team if you would like someone to explain these different options and work out what is right for your organisation.

#### **COVID-19 Example**

An organisation starts *Deliveries, Online Activities* and *Weekly Phone Calls* and wants to be able to record and report on these activities separately and all together, so their activity structure would look as below:



Please refer to the [Activities](#) guide for more information

### Timeline Events

You can track anything that has happened or changed with individual attendees using **Timeline Events**. This can help you to record the work you are doing related to COVID-19, without needing to create specific sessions or add information or tags.

**Timeline events** can be added to each individual or in bulk when adding a register to a session. All those options can be used separately or in conjunction with each other.

### COVID-19 Examples

Add a Timeline event e.g. Call Received (COVID-19) - Yes/No. When you go into the individual attendee's profile select **Timeline** and add when you receive a call from them related to COVID-19. This is automatically date-stamped in the system (date can also be amended). Notes can also be added which can be useful to ensure continuity of service and awareness of your attendee's specific needs.

### Adding a timeline event to an individual attendee

**Betty Cooke** Attendee information

Personal details | **Timeline** | Session Report

**Add an 'event' to the timeline** PRINTABLE VERSION

What has happened or changed with Betty Cooke \*

COVID-19 Support - call received

COVID-19 Support - call received entry \*

Call into helpline

Date of event \*

30/03/2020

Notes

Betty concerned that no shopping delivery received.  
Action: Check with community centre - delivery booked for Tuesday morning

Project  
Select...

Is this event linked to a specific project? If so, please specify which one.

Restricted access (optional)  
Select

When restricting access to an event, if you do not include yourself, you will lose access once the event is saved, unless you possess the System admin role.

Here you can add notes around this event. This additional information will give context and be helpful for qualitative reporting purposes.

**(Optional)** You can associate this with a specific Project.

If this timeline event contains potentially sensitive information you can choose to **restrict access** to this timeline event to only certain users here.

### Adding Timeline Events to multiple attendees at once

This can be done from a session register. On the **Session Register** at the top of the screen click **Timeline event**.

You will be presented with the list of **Timeline Events**.

Once selected – in this example a *COVID-19 questionnaire completed*, the following pop up screen will appear:

## User guides

Helping you get the most out of Upshot

What type of event would you like to add \*

COVID-19 questionnaire completed

COVID-19 questionnaire completed entry \*

Yes

Date of event \*

02/03/2020

Notes

Project

Every Young Person Has Potential

Is this event linked to a specific project? If so, please specify which one.

Activity

Monthly Social (Every Young Person Has Potential)

Is this event linked to a specific activity? If so, please specify which one.

Outcomes

Select...

all | none

Is this event linked to specific outcomes? If so select them here.

Restricted access (optional)

Select

If this timeline event contains sensitive information, you have the option to restrict user access to this event. Select the users who should have access to this event. If no users are selected, access to the event will not be restricted.

Select attendees to add this event for \*

Select all/none

Mohammed McQueen

Fred Parrott

Peter Duckworth

Sharhzad Brown

Betty Cooke

SAVE

This time the **Date, Project** and **Activity** are pre-populated based on the session you are adding the timeline event from.

Here you can add this timeline event to multiple attendees from this register at once.

Bear in mind that the **Timeline Event** and **Notes** will show on all chosen attendee's profile.

Once you have finished click **Save**.

Custom **Timeline Events** types can be added by System Administrators or Upshot Support or if you want to be less specific use **Notes**.

Use the new **Timeline Events Report (Reports > Timeline Events)** to find either the number of times a certain Timeline Event has been recorded or the number of attendees who have this Timeline Event recorded against their profile.

For each Timeline Event type shown a figure will be represented for both **Events** and **Attendees**.

- **Events** - show the total number of times this timeline event has been recorded (e.g. there are 18 *Covid-19 Deliveries* recorded).

## User guides

Helping you get the most out of Upshot

- **Attendees** - show the number of unique attendees who have this timeline event recorded on their profile. One attendee may have multiple events recorded (e.g. 14 different individuals have had *Covid-19 Deliveries*.)

<b>Covid-19 Delivery</b> Single-choice drop down	<b>18</b> EVENTS	<b>14</b> ATTENDEES	+
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This can then be broken down further to see the different types of *Deliveries*.

<b>Covid-19 Delivery</b> Single-choice drop down	<b>18</b> EVENTS	<b>14</b> ATTENDEES	-
Groceries	14	11	
Other	1	1	
Prescriptions	3	3	

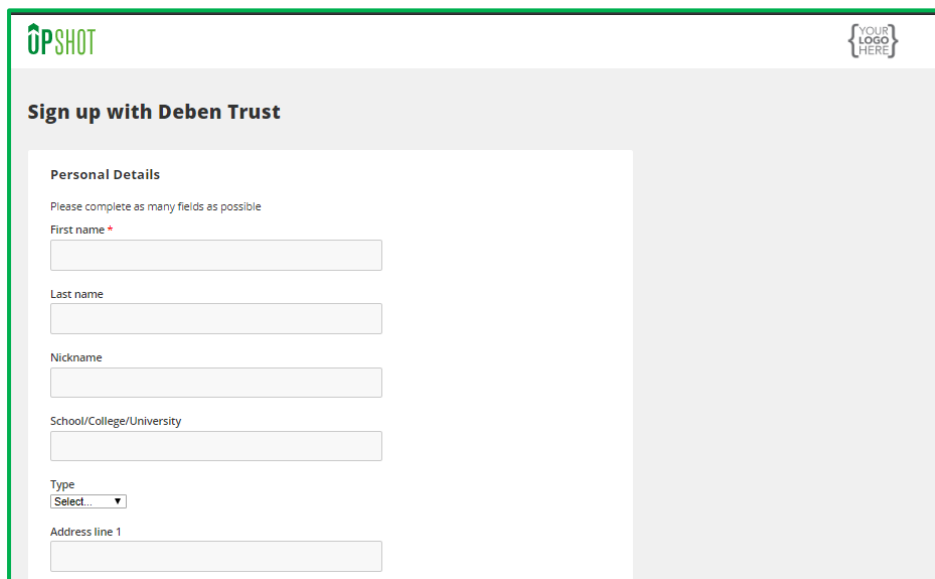
Use the filters on the right-hand side to narrow down your report to the amount of *Deliveries* within a **certain time period** for example.

Please refer to the [Timeline Events](#) guide for more information on how to add events to attendee profiles and report on them.

### Registering New Participants Remotely

#### Attendee Sign-up form

Registration of attendees can be completed by new participants themselves using the external **Attendee Sign-up Form**. This provides a *Public form URL* that can be added to your website or sent out via email, WhatsApp, text etc. or alternatively an *Embeddable form URL* allowing you to embed this onto your website.



The screenshot shows a web form titled "Sign up with Deben Trust". At the top left is the Upshot logo, and at the top right is a placeholder for "YOUR LOGO HERE". The form is titled "Sign up with Deben Trust" and contains a section for "Personal Details". Below this section, it says "Please complete as many fields as possible". The form includes the following fields: "First name" (with a red asterisk), "Last name", "Nickname", "School/College/University", "Type" (a dropdown menu with "Select..." visible), and "Address line 1".

On completion of the form these individuals sit on an **Attendee sign-up waiting list** where you can review the information they have entered, accept and add their profile to the system and consequently add them to registers.

#### **COVID-19 Example**

Organisations are likely to reach out, or provide services to, new attendees during the pandemic, who are not already registered on their Upshot account. You may want to add these participants' details to the system, but it may no longer be possible to have a physical registration form completed and returned by these individuals. By supplying a link anyone can complete the link and share any level of information so they join your database and the interaction can be recorded.

Please refer to the [Attendee Sign-up Form](#) guide for more information. If of interest, please do get in touch with Upshot Support to activate this feature for your organisation and we will then help to create your external registration form.

We are more than happy to offer support in addition to this document. If you have any questions, please do not hesitate to contact us via email or telephone.

Email: [support@upshot.org.uk](mailto:support@upshot.org.uk)

Phone: +44 (0)20 7842 8899