Data Management & EASA Center for Excellence

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How does data get used?

- AGENCY
  - Tied to fidelity review
  - Identify issues
  - Generate site analyses
  - Address active issues

- REGIONAL
  - Quality improvement
  - Setting QI goals

- FEDERAL / STATE
  - Federal block grant

- OHA
  - Identify Trends

- State Legislature
  - Tied to fidelity review

- AGENCY
  - Identify issues
  - Generate site analyses
  - Address active issues

- REGIONAL
  - Quality improvement
  - Setting QI goals

- FEDERAL / STATE
  - Federal block grant
Forms and Timeline

- **Referrals** enter within 2 weeks of referral decision. If referral decision is pending at the end of a quarter, go back and update the existing referral – DO NOT CREATE A SECOND REFERRAL
- **Intakes** enter within 2 weeks after intake is completed
- **Discharges** enter final outcome review within 2 weeks of discharge
- **Quarterly Outcomes** are due by the 15th of the following month (January, April, July, October) after the end of a quarter
- **Community Education** – Within 2 weeks of an event

TO FIND Community education survey link, training video/powerpoint & forms: [https://easacommunity.org/resource-for-professionals.php](https://easacommunity.org/resource-for-professionals.php) (scroll down to Data Collection)
Accessing REDCap

• Within three business days of getting an email login and set up your password reset questions.
• In web browser go to: https://octri.ohsu.edu/redcap

- Use your full email address and REDCap password to login
- To reset your password click on *Forgot your password?*
Logging into REDCap

• Within three business days of getting an email login and set up your password reset questions.
• To access either database in REDCap
• In web browser go to: https://octri.ohsu.edu/redcap
• Use your full email address and REDCap password to login
• To reset your password click on *Forgot your password*?
Select the database

• EASA Participant – Referral, Intake, Outcomes & Hospitalizations
• EASA Agency Outreach and Education
  – Events can also be entered by community consultation, entries can be made without logging in by going to: https://is.gd/EASA_OutreachEvents
  • NOTE: Entries created without logging into REDCap will be not initially be assigned to an Agency
Finding Patient Records

• Select a project
• In the Main menu select:
  
  Add/Edit Records > then in Data Search select an option under Choose a field to search\(^{1,2}\)

  OR

  Record Status Dashboard

2, Select at least 3 different options PRIOR to adding a new patient
Finding Patient Records

• Select a project

• In the Main menu select:

  **Add/Edit Records** > then in **Data Search** select an option under **Choose a field to search**

  OR

  **Record Status Dashboard**

<table>
<thead>
<tr>
<th>EASA ID</th>
<th>Participant Details</th>
<th>Referral</th>
<th>Intake</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Identifiers</td>
<td>HIPAA Identifiers</td>
<td>DCC Only</td>
</tr>
<tr>
<td>-----------</td>
<td>-------------</td>
<td>-----------------</td>
<td>---------</td>
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<tr>
<td>1216:1</td>
<td>Client Agency ID: TEST ONLY B47473 Name: Dori Dori DOB: 12-15-1973 Status: Intake Completed (Quarterly Reports Active)</td>
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<td>Client Agency ID: TEST 262873 Name: Duck, Derby DOB: 03-16-2001 Status: Inactive</td>
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<td>Client Agency ID: TEST 32082828 Name: Mavis, Rachel DOB: Status: In Screening Process (Referral decision not made)</td>
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<td>Client Agency ID: 123456789 Name: Test, Testy DOB: 03-13-2000 Status: Inactive</td>
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<td>Client Agency ID: Name: Dori, Dori DOB: Status: In Screening Process (Referral decision not made)</td>
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</tbody>
</table>
Agency staff create a patient/record and select form(s) with ‘Incomplete’ statuses

Agency staff enter data and save form(s) where data entry is complete as ‘Unverified’

DCC Staff review form(s).

If all required variables are completed, form status is updated to ‘Complete’

Update Visit Status to ‘Complete’ if all forms are ‘Complete’

If required variables are missing, form status is updated to ‘Incomplete’

Update Visit Status to ‘Incomplete’ if any form is ‘Incomplete’
Entering Data

- ALWAYS complete ‘Form Details’ form (including for Missing quarters)
- The system changes the fields displayed based on Form type and Form version selected
- Complete all forms in an event
- Select Unknown if a response was not gathered but contact occurred. Do not leave fields empty.
Participant Summary Spreadsheet

PURPOSE OF REPORT: Help agency staff identify any data issues. Agency staff should be reviewing this report each quarter and using it to update patient records.

Each row is a participant
- If you can’t find a participant – then they aren’t entered in the database OR you’ve entered the event information but not the participant details.

Each quarter summarizes data entered in the database
- Event type: Referral, Intake, Quarterly Outcomes, Hospitalization details.
  - @ Referral – overall status
  - @ Intake & Quarterly – Discharge reported

Completeness of an event
- If you don’t see an event or discharge then it’s not in the database as of the date of the report.
- If the event is not complete, then one or more of the required fields are missing/empty.
<table>
<thead>
<tr>
<th>EASA ID</th>
<th>Agency</th>
<th>Agency ID</th>
<th>First Name</th>
<th>Middle Name</th>
<th>Last Name</th>
<th>Birthdate</th>
<th>Q1 2018</th>
<th>Q2 2018</th>
<th>Q3 2018</th>
<th>Q4 2018</th>
<th>Q1 2019</th>
<th>Q2 2019</th>
<th>Q3 2019</th>
<th>Q4 2019</th>
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<td>Qc</td>
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</tr>
</tbody>
</table>

**Legend:** Event codes have 2 to 4 characters (XYZH) that have the following definitions
- **X** = Event type (Referral=R, Intake=I or Quarterly Outcome=Q, Hospitalization details = H)
- **Y** = data completeness in REDCap (complete=c, incomplete=i, missing event=m)
- **Z** = Discharged at Intake or Quarterly Outcome (Discharge completed=d) OR Referral Decision (screened in=I, screened out=O, screening decision pending=P or missing=m)
- **H** = Psychiatric hospitalization was reported as occurring in the last quarter.
- **oooo** = Event has not been coded yet to determine data completeness
Data Summary Spreadsheet

PURPOSE OF REPORT: Help agency staff identify trends and issues in their data. Agency staff should be reviewing this report each quarter and using it to inform decisions.
Common Data Issues to Look For

- Referral screened decision is left Pending. Remember to go back in and enter a Screened decision and reason.

- Incomplete events
  - Use unknown if the answer is unavailable and the visit occurred
  - Use the Participant Summary to easily identify these events (2nd letter = i)

- Duplicate participants in the same agency
- Not entering a missed Quarterly Outcome visit
- Not entering a discharge for a participant
- Duplicate events for a participant (e.g. 2 Quarterly Outcomes for 2019-Q1)
- Missing Hospitalization details
Common Data Issues to Look For

• **Multiple referrals** for a single patient?
  – Complete 1 referral form (use first referral) **UNLESS** the person is referred but not accepted and then after another referral is screened in.

• **What if intake occurs mid-quarter?**
  – Complete an intake AND a quarterly outcome.
    • Example- Intake completed February 15\textsuperscript{th} for prior 3 months. At the end of the quarter (March 31\textsuperscript{st}) an outcome review should be completed for any outcomes that occurred from February 16 through the end of March.

• Track all hospitalizations continually for 3 months prior to intake through discharge.

• Patient **discharges and returns?**
  – Do not complete a Referral form if one has been completed within the agency.
  – Complete an Intake for the period between ‘now’ and the date of discharge OR for the past 3 months if discharge was longer than 3 months ago. Then continue completing Quarterly Outcomes.
Additional Notes

- Database is changing over time