

Data Management & EASA Center for Excellence

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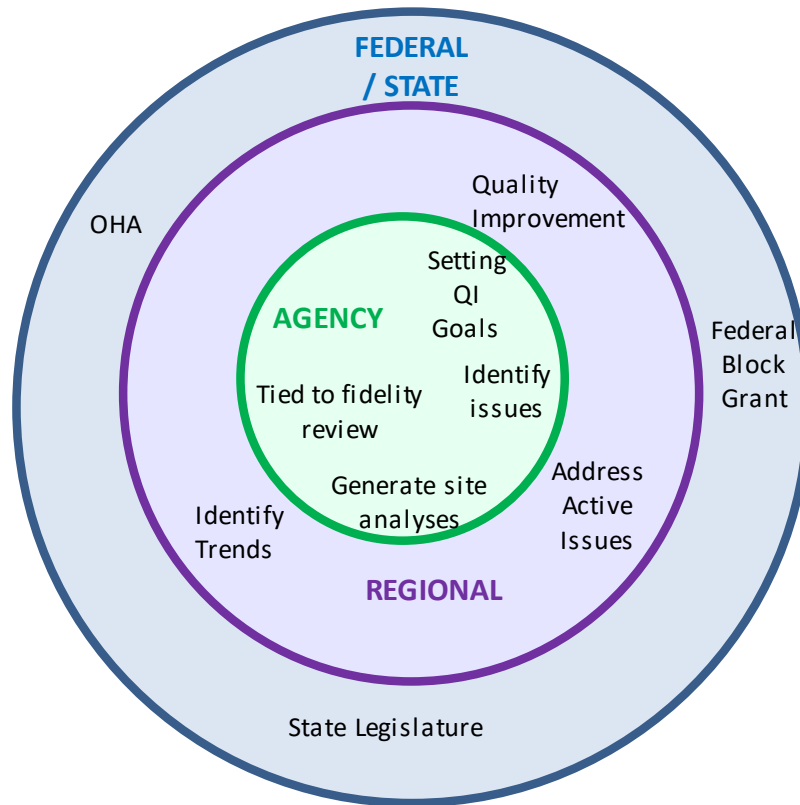
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EASA Center for Excellence

How does data get used?



Forms and Timeline

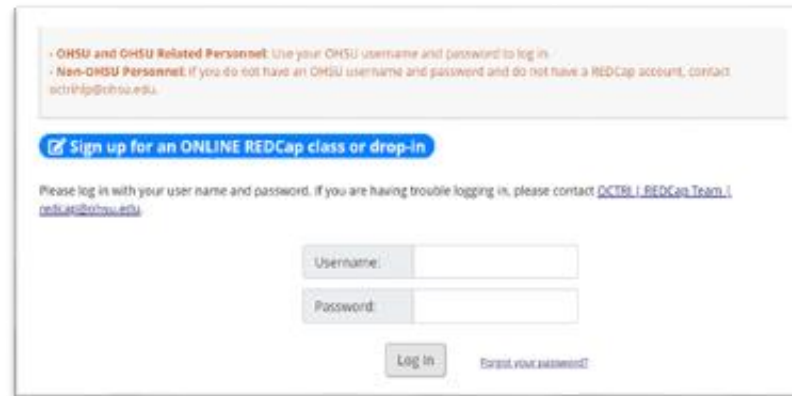
- **Referrals** enter within 2 weeks of referral decision. If referral decision is pending at the end of a quarter, go back and update the existing referral – DO NOT CREATE A SECOND REFERRAL
- **Intakes** enter within 2 weeks after intake is completed
- **Discharges** enter final outcome review within 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> (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>



The screenshot shows the REDCap login interface. At the top, there are two lines of text: "• OHSU and OHSU Related Personnel: Use your OHSU username and password to log in." and "• Non-OHSU Personnel: If you do not have an OHSU username and password and do not have a REDCap account, contact octri@ohsu.edu." Below this is a blue button with a checkmark icon and the text "Sign up for an ONLINE REDCap class or drop-in". Underneath the button, a message says "Please log in with your user name and password. If you are having trouble logging in, please contact OCTRI | REDCap Team | octri@ohsu.edu". There are two input fields: "Username:" and "Password:". Below the password field is a "Log In" button and a link that says "Forgot your password?".

- 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>

A screenshot of the REDCap login interface. At the top, there is a light gray box with instructions: "OHSU and OHSU Related Personnel: Use your OHSU username and password to log in." and "Non-OHSU Personnel: If you do not have an OHSU username and password and do not have a REDCap account, contact octri@ohsu.edu". Below this is a blue button with a checkmark icon and the text "Sign up for an ONLINE REDCap class or drop-in". Underneath is a line of text: "Please log in with your user name and password. If you are having trouble logging in, please contact OCTRI | REDCap Team | redcap@ohsu.edu". The login fields consist of a "Username:" label followed by a text input box, and a "Password:" label followed by a text input box. At the bottom right of the form are two buttons: "Log In" and "Forgot your password?".

- 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

1, Search using 'easaid', 'prime', 'firstname', 'middlename', 'lastname', or 'dob'

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

The screenshot displays the REDCap web application interface. The top navigation bar shows the user is logged in as 'mitc juli'. The main menu on the left includes 'My Projects', 'Project Home and Design', 'Data Collection', 'Applications', and 'Reports'. The 'Data Collection' section is expanded, showing 'Record Status Dashboard' and 'Add / Edit Records'. The 'Add / Edit Records' form is open, showing a total of 6,659 records. Below this, the 'Data Search' section is visible, with a dropdown menu open showing a list of fields to search by, including 'easaid (EASA ID)', 'mvbncid (MVBCN Row ID for Participant)', 'easaidold (Old EASA ID)', 'agencyid (Client (Agency) ID#)', 'agencyid_2 (Client (Agency) ID#)', 'prime (Prime No. (OHP ID))', 'addl_easaid (Prior EASA ID's (entered by DCC))', 'county_multiple (If multiple, specify all counties of residence and ...)', 'event_id (Event ID)', 'year (Completed by DCC) Year of Event', 'formdate (Date form started)', 'formtime (Time form started)', 'referraldt (Referral date)', 'admitdt (Intake - date admitted to treatment)', 'completeddate (Date completed)', 'completedby (Staff name that completed the form)', 'uploadid (Record ID)', 'firstname (First name)', and 'middlename (Middle name)'. The 'Choose a field to search' dropdown is currently set to 'All fields'.



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)**

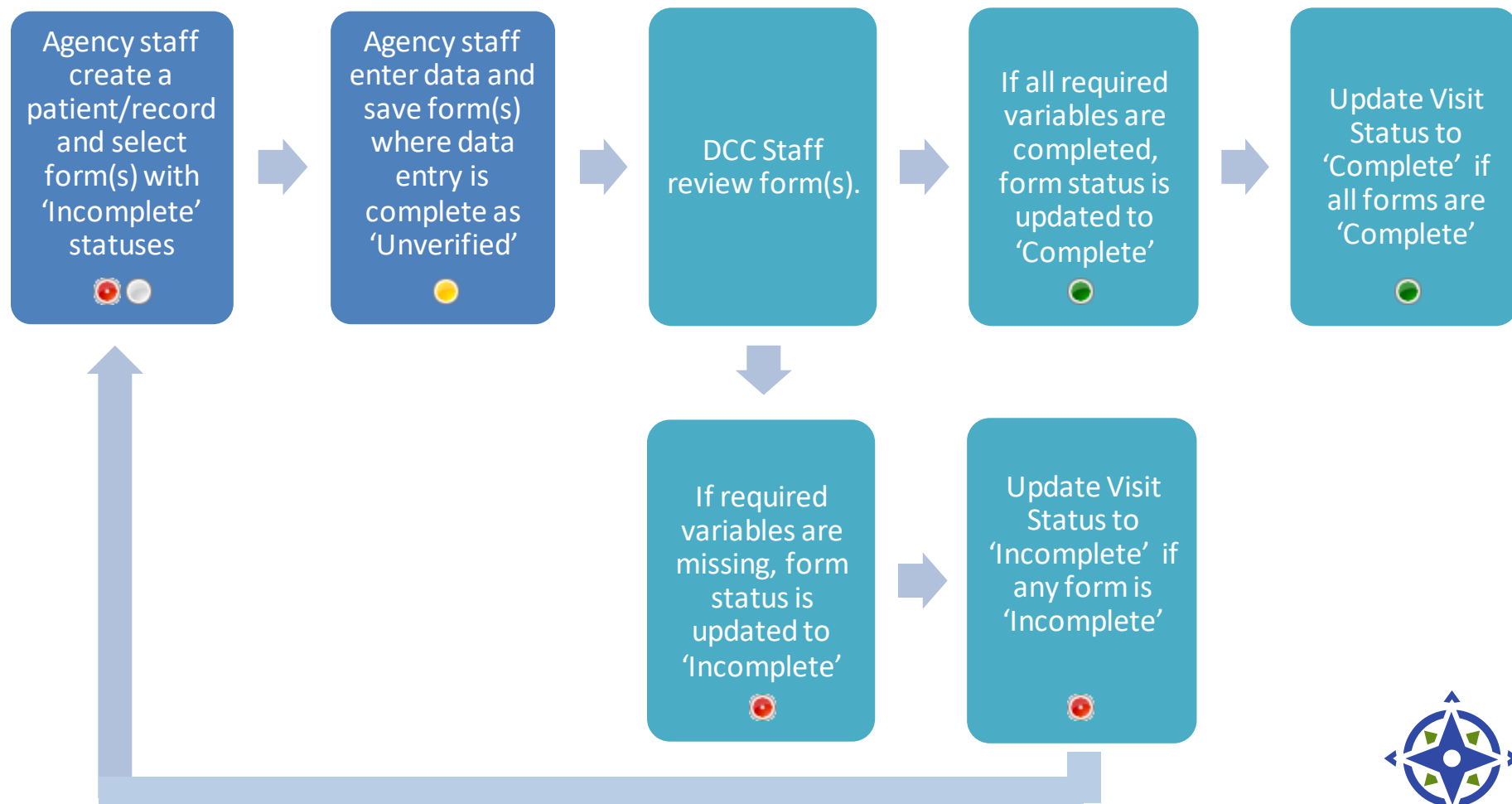
OR

Record Status Dashboard

[Re-enable floating table headers](#) | ?

[illegible]

Data Cleaning Workflow



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.

Data Collection

Record Status Dashboard
Add / Edit Records

EASA ID 1216-1
Client Agency ID: TEST ONLY 847473 Name: , DOB: 12-15-1975
[Select other record](#)

Event: **Referral**

Data Collection Instruments:

- Form Details (includes Time point)**
- DCC Only
- Screening
- Living Situation, Support, Legal & Misc.
- Diagnoses (For Reporting)
- Referral Decision

Applications

- Alerts & Notifications
- Calendar
- Data Exports, Reports, and Stats
- Data Import Tool
- Data Comparison Tool
- Logging
- File Repository
- User Rights and DAGs
- Data Quality and Resolve Issues

Actions: [Download PDF of instrument\(s\)](#) [Share instrument in the Library](#)

Form Details (includes Time point)

For issues with data entry or reporting, adding users, or questions about this project, dcc@ohsu.edu or esa@ohsu.edu

Editing existing EASA ID **1216-1** Client Agency ID: TEST ONLY 847473 Name: , DOB: 12-15-1975 Status: Intake (Active)

Event Name: **Referral**

EASA ID 1216-1

Referral, Intake or Outcome Details

Form type
* must provide value
Referral

Version date of form completed
* must provide value
March 21, 2019 or March 29, 2019
Please use the most current version is March 19, 2019.

Living Situation

Living Situation (check all that apply)
* must provide value

- ☐ Transient/Homeless (no permanent address)
- ☐ Foster Home
- ☐ Residential Facility
- ☐ Jail
- ☐ Prison
- ☐ Supported Housing
- ☐ Alcohol and Drug Free Housing
- ☐ Private Residence (lives alone)
- ☐ Private Residence (with relative)
- ☐ Private Residence (with non-relative)
- ☐ Other
- ☐ **Unknown**



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



Participant Summary Spreadsheet

EASA ID	Agency	Agency ID	First Name	Middle Name	Last Name	Birthdate	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019	Q2 2019	Q3 2019	Q4 2019	
123-1	XYZ	312932	Sarah	H	Smith	11/9/1998	Rcl IcH Hc Qc	Qc	Qi	Qc	Qc	Qc	Qc	Qcd	★
123-2	XYZ	939882	Tom		Donaldson	4/13/2000		Rcl	Ic Qc	Qc	QcH Hc	Qc	Qc	Qc	★
123-3	XYZ	283838	James	L	Brown	7/25/1996			Rcl Hc	IcH Qc	Qc d OR	Qcd			
123-4	XYZ	23837	Joseph	A	Seers	7/4/1998	Ril	Ic Qc	Qc	Qc	Qid	Ic	Qc	Qc	
123-5	XYZ	382827	Kile	L	Bailey	4/13/1993		Ril Qc	Ic Qcd		QcH Hc IcH	Qi	Qc	Qi	
123-6	XYZ	690687	Nick	D	Noli	8/22/1994				RcO liH	Hc Qc	Qcd			
123-7	XYZ	82727	Jonathan	C	Ortiz	7/21/2001					Rcl Hc	IcH Qc	Qc	Qc	
123-8	XYZ	233222	Michael	E	Vasquez	1/17/1996	Qc	QcH Hc	Qc	Qc	Hc Qi	IcH Qc	Qid		
123-9	XYZ	293382	Kiesha	H	Grey	7/17/2000	Hc	Rcl	Ic Qi	Qi	Qi	Qi	Qi		
123-10	XYZ	202660	Thomas	E	Sanders	4/26/2001	Qcd				Ic Qc	Qc	Qc	Qc	
123-11	XYZ	234232	Robert	S	Attebury	7/2/2003				RiP	Ic Qc	Qc	Qc	Qc	
123-12	XYZ	234233	Elizabeth	N	Hellers	1/29/1998				Rcl Hc	Qi	Qcd	Qi		
123-15	XYZ	64526	Erin	W	Montgomery	5/5/2002				Rcl Qc	Ic Qc	Qc	Qcd		
123-18	XYZ	123422	Aaron	D	Verez	5/27/2002				Hc	Rcl IcH Hc	Qc	Qc	Qc	★
123-22	XYZ	2342-3837	Edward	F	Herrerra	6/10/1998	RcO						RiP		
123-23	XYZ	9272-1234	Jasmin	S	Koehler	4/4/1996					Rcl Hc Qc	IcH Qid	Ic Qc	Qi	
123-24	XYZ	1098-2321	Noah	P	Cannon	1/18/1996	Rcl				Ic Qc	Qc	Qc	Qc	★

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 15th for prior 3 months. At the end of the quarter (March 31st) 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

