

# Data Management & EASA Center for Excellence

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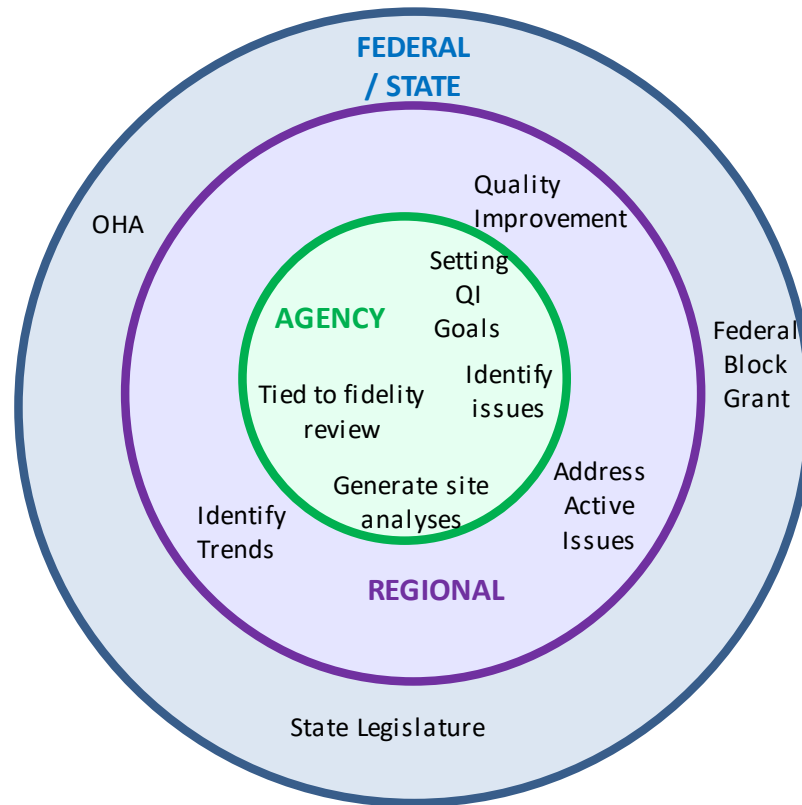
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January 13, 2021



**EASA** Center for Excellence

# How does data get used?



# Forms and Timeline

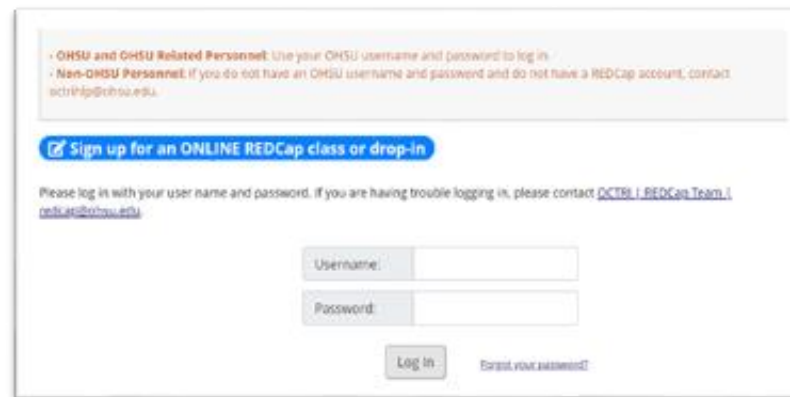
- **Referrals** enter within 2 weeks of referral decision. If referral decision is pending at the end of a quarter, go back and update the existing referral – DO NOT CREATE A SECOND REFERRAL
- **Intakes** enter within 2 weeks after intake is completed
- **Discharges** enter final outcome review within 2 weeks of discharge
- **Quarterly Outcomes** are due by the 15<sup>th</sup> 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>



• OHSU and OHSU Related Personnel: Use your OHSU username and password to log in.  
• Non-OHSU Personnel: If you do not have an OHSU username and password and do not have a REDCap account, contact [octri@ohsu.edu](mailto:octri@ohsu.edu).

Sign up for an ONLINE REDCap class or drop-in

Please log in with your user name and password. If you are having trouble logging in, please contact [OCTRI-REDCap.Team.1@ohsu.edu](mailto:OCTRI-REDCap.Team.1@ohsu.edu).

Username:

Password:

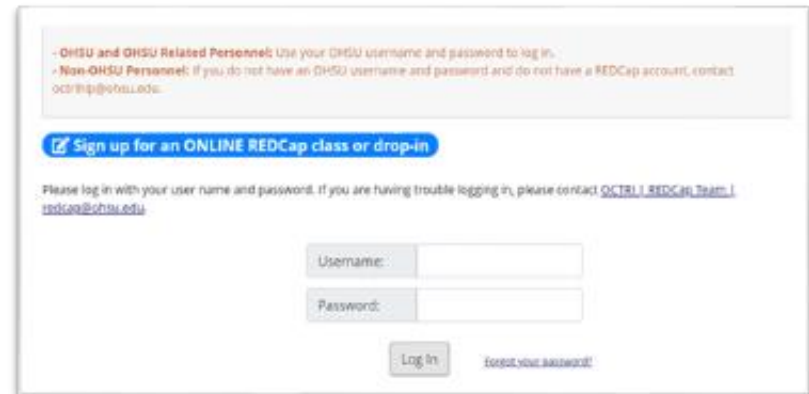
[Forgot your password?](#)

- 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>



- OHSU and OHSU Related Personnel: Use your OHSU username and password to log in.  
- Non-OHSU Personnel: If you do not have an OHSU username and password and do not have a REDCap account, contact [octri@ohsu.edu](mailto:octri@ohsu.edu).

[Sign up for an ONLINE REDCap class or drop-in](#)

Please log in with your user name and password. If you are having trouble logging in, please contact [OCTRI REDCap Team | octri@ohsu.edu](mailto:OCTRI_REDcap_Team@ohsu.edu)

Username:

Password:

[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](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**<sup>(1,2)</sup>

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

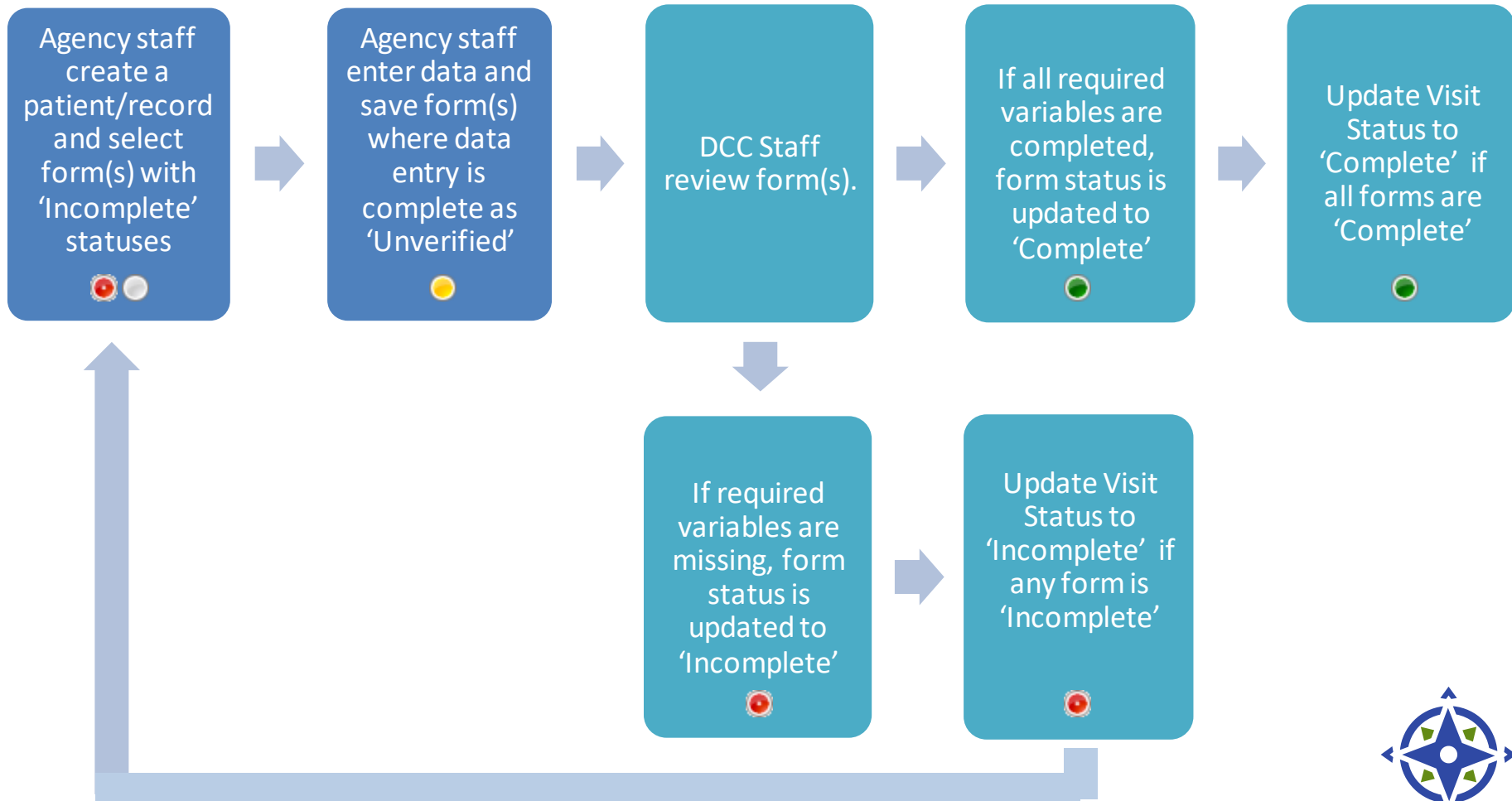
The screenshot displays the REDCap interface. On the left is a navigation sidebar with the REDCap logo and the user 'Logged in as mitcjuli'. The sidebar includes sections for 'My Projects', 'Project Home and Design' (with links to Project Home, Designer, and Dictionary), 'Data Collection' (with Record Status Dashboard and Add / Edit Records), 'Applications' (with 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, External Modules, and REDCap Wiki), and 'Reports'. The main content area is titled 'Add / Edit Records' and contains a message about data entry issues, a 'Total records: 6,659' indicator, a 'Choose an existing EASA ID' dropdown menu, and a '+ Add new record' button. Below this is a 'Data Search' section with a 'Choose a field to search' dropdown menu and a 'Search query' input field. A dropdown menu is open, listing various fields such as 'easaid (EASA ID)', 'mvbcnid (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)', 'referralidt (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)'. At the bottom of the interface are 'Search', 'Organize', and 'Edit' buttons.







# 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.

The screenshot displays a web-based data entry interface. At the top, there are navigation options: 'Data Collection', 'Record Status Dashboard', and 'Add / Edit Records'. Below this, the 'EASA ID 1216-1' is shown with client agency information. A sidebar on the left lists 'Applications' such as 'Alerts & Notifications', 'Calendar', and 'Data Exports, Reports, and Stats'. The main content area is divided into several sections: 'Form Details (includes Time point)' with a dropdown menu for 'Form type' (set to 'Referral') and 'Version date of form completed' (set to 'March 21, 2019 or March 29, 2019'); 'Referral, Intake or Outcome Details'; and 'Living Situation' with a list of checkboxes for various housing types, including 'Unknown' which is highlighted with a green box.



# 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		Rcl 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 QiH	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	XX cl	Ic 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	XX cl - only	
123-23	XYZ	9272-1234	Jasmin	S	Koehler	4/4/1996					Rcl Hc Qc IcH	Qid	Ic Qi	Qi	enter if Screened
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 (2<sup>nd</sup> 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<sup>th</sup> for prior 3 months. At the end of the quarter (March 31<sup>st</sup>) 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

