EASA Data Entry in REDCap

December 2016
Agenda

- Roll call
- Agenda Review
- Timelines
- Orientation to REDCap
- Form Walk-through
  - Including Data Entry Scenarios
- Data Dictionary
- Sending Data
- Upcoming
- Questions
Timelines for Data Entry and Verification

- Access to REDCap will be granted once:
  - A Business Associates Agreement is signed OR a person with authority in your agency notifies us that a BAA is not needed
  - The individual performing data entry has completed a RedCap training

- 2017, Quarter 1 data deadline has been **extended** from April 15\(^{th}\) to May 15\(^{th}\)

- OHSU is currently reconciling and entering data previously collected by OHA. If you log in and do not see data/forms for a participant that you have previously submitted to OHA – OHSU will be following up with your agency to get the data/forms

- In an attempt to ensure that OHSU’s system is inclusive and representative of the EASA data over the past 2.5 years since a electronic data capture system was used, agency reports will be generated.
  - Agencies asked to verify the EASA participants by early June. Reports will include participants that screened for participation in EASA, number of Referrals, number of Intakes, and incidences where Quarterly Outcomes were and were not completed.

- Agencies will be sent reports and asked to resolve data issues starting mid-May.
Timelines for Future Data Entry

• Deadlines:
  • Referrals- 2 weeks past point of referral decision
  • Intakes- 2 weeks after intake completed
  • Discharges- Final outcome review 2 weeks after discharge

• Routine outcome reviews:
  • Quarterly (Jan-March, April-June, July-Sept, Oct-Dec) due 2 weeks after end of quarter (15th of the following month)
Getting Started

• Follow established EASA notification process for adding new staff to be added to the EASA list serve and REDCap (Add’l info to follow)

• Attend a REDCap EASA Data Entry training session

• Each person at an agency will receive an email granting them permission to log into REDCap.

• Within 30 days of receiving the email please set your password.

DO NOT SHARE YOUR PASSWORD

Email message

SUBJECT:
REDCap access granted

MESSAGE:
[This message was automatically generated by REDCap]

A REDCap account has been created for you in which your REDCap username is "your email address". Click the link below to set your new password and log in.

Set your new REDCap password
Logging In

• Web address: https://octri.ohsu.edu/redcap

• User name: your email address*

• Password: what ever you set

* Users with access to multiple agencies will be assigned multiple email accounts with a ‘1’ or ‘2’, etc. after their email address for each additional agency that they need to perform data entry for

DO NOT SHARE YOUR PASSWORD

Figure 1. REDCap log in screen
Password Strength

• At least eight characters in length
• Must contain at least one alphabet character
• Must contain at least one numeric character
• Must have a capitalized letter, punctuation mark or a non-alphanumeric character
• Must not contain your first name, last name, username or email
• Using words found in any dictionary, including medical and foreign language, is discouraged
Resetting Password

• If you forget your password click on Forgot your password

DO NOT SHARE YOUR PASSWORD

* Users with access to multiple agencies will be assigned multiple email accounts with a ‘1’ or ‘2’, etc. after their email address for each additional agency that they need to perform data entry for

Figure 1. REDCap log in screen
Accessing Your Databases

A. To access EASA databases go to the **My Projects** tab at the top of the screen then scroll down them.

B. Each user will then have their user account assigned to 3 EASA databases.

- EASA Participant Information
  - *Referral, Intake, Outcome & Hospitalizations*
- EASA Outreach and Education
- EASA Mailing lists
Restricted Viewing

• EASA Agency staff can only access participants that are associated with your agency

• All reports that are generated will only show participants associated to your agency

• De-identified summary reports will also be generated periodically and shared with EASA team members
REDCap Navigation

• After selecting a database you will see the following screen (Figure 3)

A. The left hand side is the menu panel that will help you navigate REDCap

B. Database name

Figure 3. REDCap – Project Home
Creating a New Participant

Before creating a new participant, please perform a search to ensure that the participant record doesn’t already exist.

A. Mouse click on Add / Edit Record in the left hand menu

B. Mouse click on Add new record on the page

Figure 4. REDCap – Add/Edit Records
Finding An Existing Participant

A. Mouse click on **Add / Edit Record** in the left hand menu

B. **Choose a Search Field** (Client Agency ID, Last Name, Date of Birth, etc.)
   - Type in the **Search Query**
     *There is a type ahead functionality that provides all options that match what information typed in the **Search Query** field*

C. **Choose an existing EASA ID**
   *There is a type ahead functionality that provides all options that match what information typed in the **Search Query** field*
   - Then mouse click on the correct option to be taken to the record

![Figure 5. REDCap – Find Records](image)
A. The Record Status Dashboard is a graphical representation where each row represents a single participant and all the data entry forms will be completed at each time point (event). The data entry forms are listed across the top of the grid with all time points (events) and participants are listed down the side of the grid.

Figure 7. REDCap – Record Status Dashboard
A. The Event Grid is a graphical representation of which data entry forms will be completed at each time point (event). The data entry forms are listed down the left column and the time points (events) are listed across the top of the grid. The individual forms are represented by colored buttons.

B. The color of the button represents the status of the form.

- For the EASA Participant Information database there are 10 different data entry screens. Not all screens are completed at a given event (visit).
- If you want to navigate through the record for this subject, click on the buttons to select the form you want to see.

Figure 6. REDCap – Event Grid
Finding/Entering Data

A. To add more than 1 Referral or Intake Form mouse click on ‘+ Add new’

B. To add more than 8 Quarters of Outcome Reviews click on ‘+ Add new’

C. To add more than 1 Hospitalization mouse click on ‘+’
EASA ID

• REDCap will automatically create the EASA ID for a NEW participant at an agency

A. Upon creating a NEW participant record – the system will automatically direct a user to the **Record Home Page**. This is an automated number that is unique per participant.

B. To access a screen (form) mouse click on the corresponding circle (event and data collection instrument)

C. Start by completing the screens in the **Participant Details**, which include **Identifiers** and **HIPAA Identifiers**.

D. Click on the **EASA ID** in the **Data Collection Panel** to access the **Event Grid**

![Figure 8. REDCap – EASA ID (e.g. record ID)](image)
Data Entry (1 of 5)

• The grouping of data is different on the forms then it is in the database

• Data is grouped by ‘Topics’ on a data entry page/screen

A. Data Collection Panel - Lists the data forms that need to be completed for the event (visit)

Figure 9. REDCap – Data entry
Data Entry (2 of 5)

A. Participant identifiers located at the top of each screen once a participant is selected

B. Complete the fields in each form. All fields labeled as ‘* must provide a value’ in a form must be completed in order to save a form.

C. For some values, if unknown specify that it is not known (this is different then if a field is left blank/empty/missing)

• Navigate between fields using [Tab] or mouse clicks. If you press [Enter], you will save the form, and exit the current screen.
A. **Field Notes**: Some fields have a field note, shown in small blue type below the data field. These notes provide field-specific information to help the person entering data.
   - Some fields have field notes that direct individuals for Unknown or UNK

B. Set the **Form Status** for EVERY FORM.
   - **Form Status** indicates the completeness of a form.
     - Grey – form not started
     - Red – incomplete – form started but not completed by EASA Agency staff
     - Yellow – unverified – form completed by EASA Agency staff and ready for OHSU processing
     - Green – complete – form reviewed by OHSU – ready for use in reporting

*Figure 11. REDCap – Field Notes & Form Status*
Data Entry (4 of 5)

• If you navigate off the form without pressing [Enter] or clicking on 1 of the 3 “Save” buttons on the screen, your work will be lost.

A. Save options:
  • **Save Record** – saves the data and returns to the record selection screen for the current form.
  • **Save and Continue** – saves the record and remains on the form for the same Study ID.
  • **Save and go to Next Form** – saves and navigates to the next form on the list for the study ID.

B. **Cancel**: leaves the current screen and DOES NOT SAVE the changes you made. There is no warning message on the screen when you leave without saving data.

• Navigating: If you enter data in a form, then navigate to a different record by clicking on form text or a button without clicking on one of the “Save” buttons, the data you entered will be lost.

Figure 12. REDCap Save and Cancel
UPDATING CLIENT IDENTIFIERS

• To update Client Name, Client (Agency) ID, Date of Birth or Prime ID (OHP No.) update the Referral Visit

• If multiple Names or Client (Agency) ID in the same field and separate options using ‘or’;
  • First names/nickname
    • ‘James or Jamie’
  • Client (Agency) ID
    • ‘28923 or 48536’

• Unknown
  • If a value is unknown please type ‘UNK’ or ‘unknown’ into the field as directed by the Field Notes
Data Entry Scenarios

• If there are multiple referrals, complete only one referral form (use first date of referral) UNLESS the person is referred but not accepted and then after another referral is screened in.

• If intake came during this quarter, enter outcome review from date of intake to date of quarter
  • 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.

• Hospitalizations admits and discharges are tracked continuously from 3 months prior to intake until discharge

• If the person is discharged and returns, complete INTAKE back to the date of discharge OR 3 months if discharge was longer than 3 months ago
Reports

• Reports will be available that your agency can access.

A. Mouse click on **EASA Participants** under the **Reports** Panel

B. These reports will have up to 3 different filters.

• To request additional report templates send a request to **dcc@ohsu.edu**

• Adding more reports over the next few months

• Data Exports – performed separately and will be de-identified

**Figure 13. Reports**
Logging

• History button for each variable

A. Mouse click on the red H on the right side of the window

Figures 14 & 15. Data entry and Data history
Data Validation/Cleaning (1 of 4)

• OHSU will also be performing data cleaning for historical and current data

• Focus initially on current data for active participants

A. Click on Resolve Issues in the Application panel

B. Search for Open / unresolved Issues

Figures 16. Data validation/cleaning
**OPTION 1**

A. Mouse click on the comment to address to open the Data Resolution Workflow

B. Respond to the issue, which may include updating the value in the form

C. Click on **Respond to query**
OPTION 2

A. Mouse click on the Record ID to open the form (opens up the form with the data issue)

B. Mouse click on quotation bubble with a red apostrophe and respond to the issue, which may include updating the value in the form

C. Click on Respond to query

Figures 19 & 20. Data resolution – option 2
Data Validation/Cleaning (4 of 4)

• How to see/resolve issues
  • Log into REDCap to see the open issues
  • Agencies will be sent an Excel document with issues

• Please do not send answers in separate emails – include in the Excel document
Entering Agency Outreach and Education

• Agencies will receive an email notification when this will start. This will operate similarly to how it is now, the only major difference will be that the URL website will change.
Entering Mailing Lists

• Agencies will receive an email notification when this will start. This will operate similarly to how it is now, the only major difference will be that the URL website will change.
New Data Dictionary

• Simplified data entry instructions will be provided

• A detailed document for mapping fields to the REDCap database will be provided to Agencies that want to send their data using .xlsx or .xls or .csv files will be provided after this spring/summer when we implement additional form revisions
  
  • *Old data dictionary mappings will be accepted through the end of 2017. Please do not make revisions at the current time as we anticipate additional form changes over the next 6 months.*
Support

• OHSU has been working on importing previously collected data
  • Data clarification requests will then be sent to agencies

• REDCap trainings – offered via recorded session and the powerpoint instruction packet

• Technical assistance support is available- to arrange please email DCC@ohsu.edu
  • Trouble-shooting
  • Answer questions about data entry
Questions?

• After the presentation please send questions about data entry or data clarifications to dcc@ohsu.edu