USER MANUAL

HOPE Consortium

REDCap

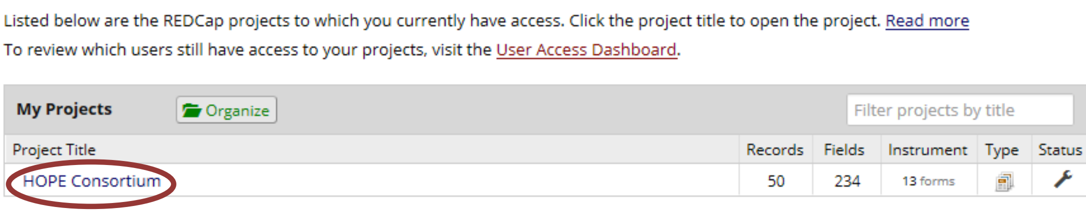
Updated February 2017

Table of Contents

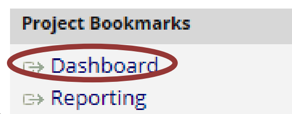
Logging into REDCap

1. In web browser enter URL: https://redcap.mcrf.mfldclin.edu/redcap/birc/
2. Enter username and password.
3. Click “Log In”.
4. Click “My Projects”.

5. Under Project Title click “HOPE Consortium”.

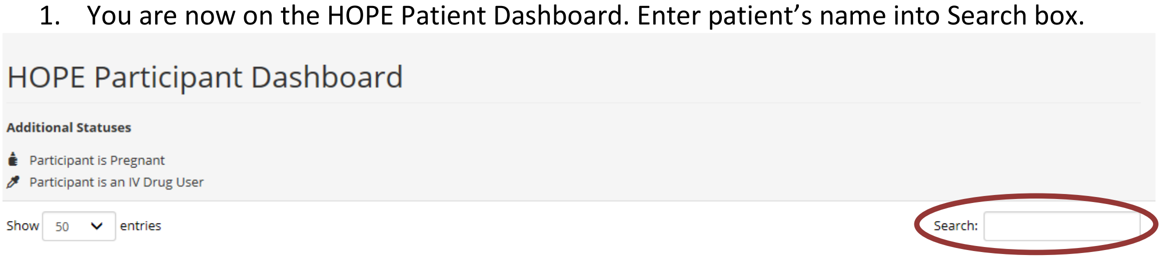


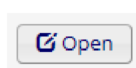
6. Under Project Bookmarks tab click “Dashboard”.

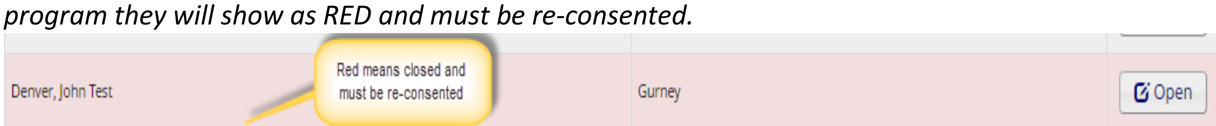


Searching/Adding a Patient

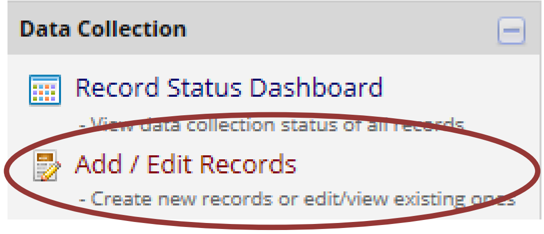
1. You are now on the HOPE Patient Dashboard. Enter patient’s name into Search box.



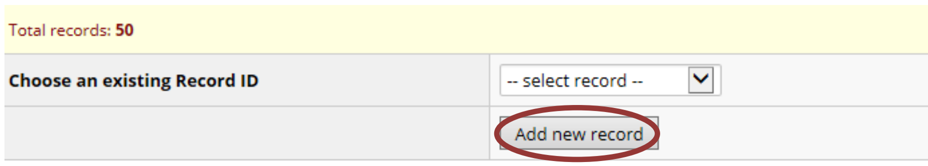
2. If the correct patient name is found, click  next to the name of the patient you wish to view. *Note: if the patient was previously enrolled in the HOPE consortium but has left the program they will show as RED and must be re-consented.*



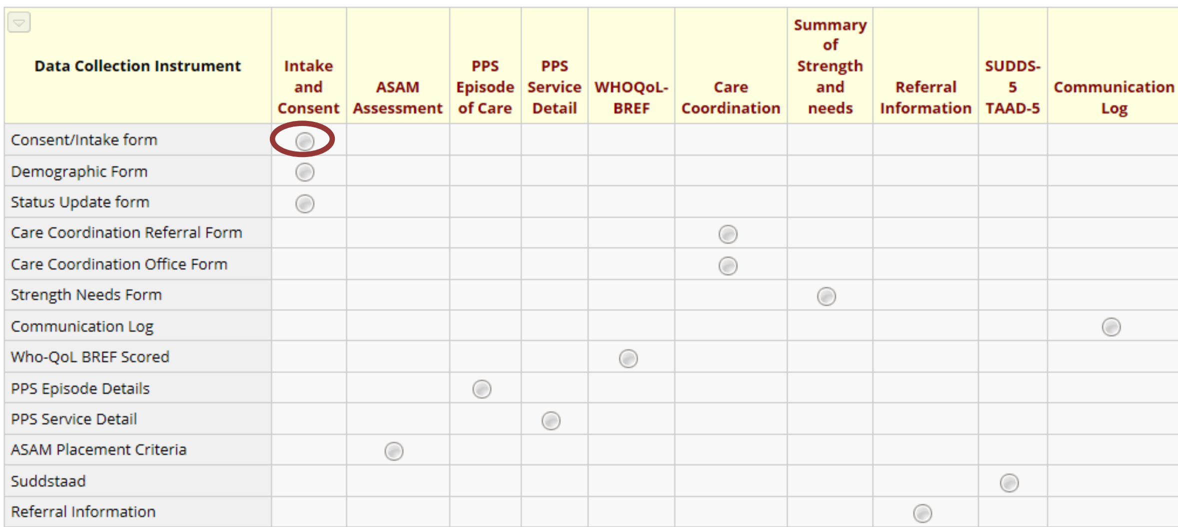
3. If the patient name is not found, click the “Add/Edit Records" button under the Data Collection tab.



4. Click “Add new record”.



5. Click the Consent/Intake Entry clear dot under intake and consent.

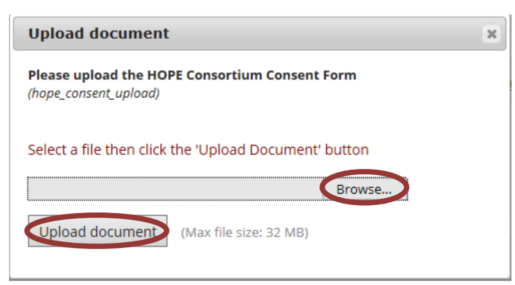


Data Collection Instrument	Intake and Consent	ASAM Assessment	PPS Episode of Care	PPS Service Detail	WHOQoL-BREF	Care Coordination	Summary of Strength and needs	Referral Information	SUDDS-5 TAAD-5	Communication Log
Consent/Intake form	○									
Demographic Form	○									
Status Update form	○									
Care Coordination Referral Form						○				
Care Coordination Office Form						○				
Strength Needs Form							○			
Communication Log										○
Who-QoL BREF Scored					○					
PPS Episode Details			○							
PPS Service Detail				○						
ASAM Placement Criteria		○								
Suddstaad									○	
Referral Information								○		

Consent/Intake Form

1. Upload the Consent Form. **First be sure you have the document stored on your computer before uploading.** Once the document is on your computer, click “Upload document”.

2. Click “Browse” and find the file saved on your computer. Once the file is selected, click “Upload document”. *Note: the document cannot be viewed until the save button is clicked.*



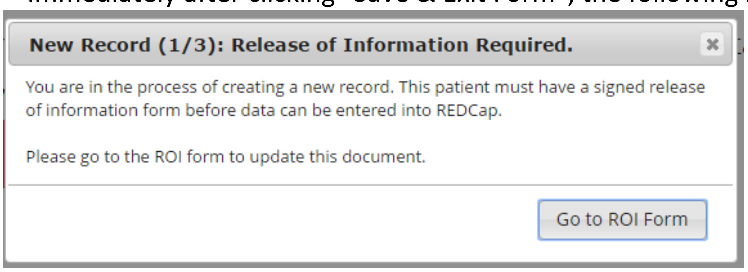
3. Fill in the date that the patient is consenting to enter the program. *Note: this date must be earlier than any other date entered into REDCap for REDCap to function properly.*

4. Enter Patients status: Click “Active”.

5. If the form is complete, change the form status to Complete. If the form is not complete, mark the status as incomplete.

6. Once this page is complete, click “Save & Exit Form”. 

7. Immediately after clicking “Save & Exit Form”, the following box will appear.

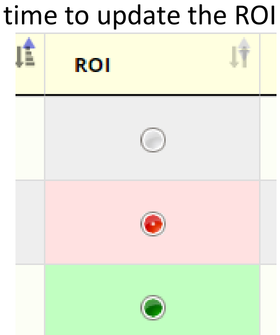


8. Click “Go to Demographics form”.

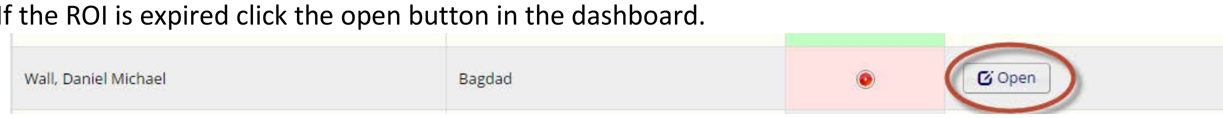
Release of Information (ROI)

1. The ROI must be updated every year. The dashboard will show an ROI bubble. The following key indicates the action needed:
    - Clear: no action is needed.
    - Red: no ROI on file or ROI is overdue.
    - Green: ROI needs to be updated soon.

   After 11 months since the previous ROI signature, the bubble will turn green alerting you that it is time to update the ROI consent. Hovering over the bubble will give details regarding the signed ROI.



2. If the ROI is expired click the open button in the dashboard.

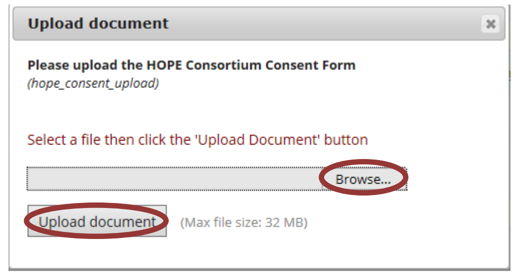


3. Click the 

button located at the top of the page.

4. Enter the Date of the ROI.

5. Upload the ROI Form. **First be sure you have the document stored on your computer before uploading.** Once the document is on your computer, click "Upload document".

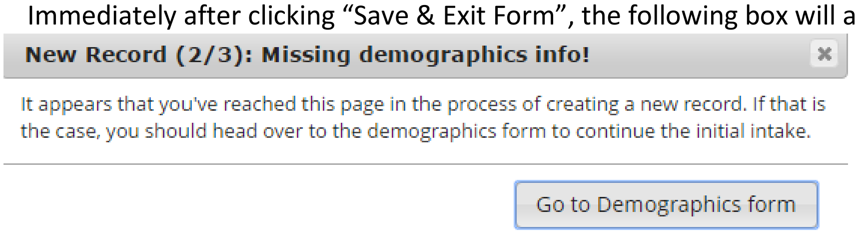


6. Click "Browse" and find the file saved on your computer. Once the file is selected, click "Upload document". *Note: the document cannot be viewed until the save button is clicked.*

7. If the form is complete, change the form status to Complete. If the form is not complete, mark the status as incomplete.

8. Once this page is complete, click "Save & Exit Form". 

9. Immediately after clicking "Save & Exit Form", the following box will appear.

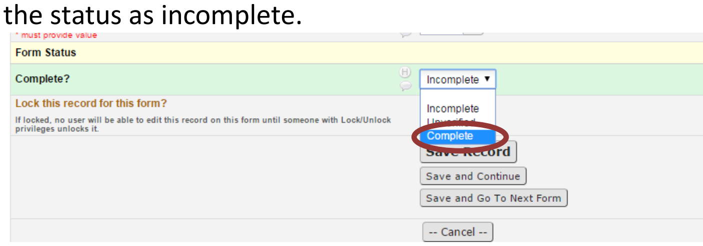


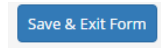
10. Click "Go to Demographics form".

Demographics Form

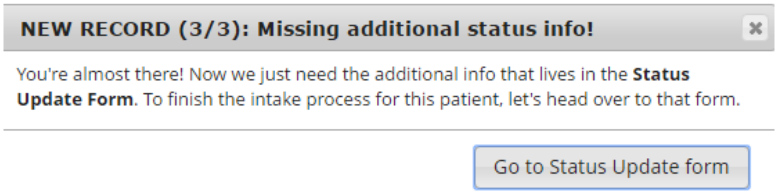
1. Fill out the demographics form completely. Some fields in this form are used in PPS reporting so it is important to fill in all known information.

2. If the form is complete, change the form status to Complete. If the form is not complete, mark the status as incomplete.



3. Once this page is complete, click “Save & Exit Form”. 

4. Immediately after clicking “Save & Exit Form”, the following box will appear.

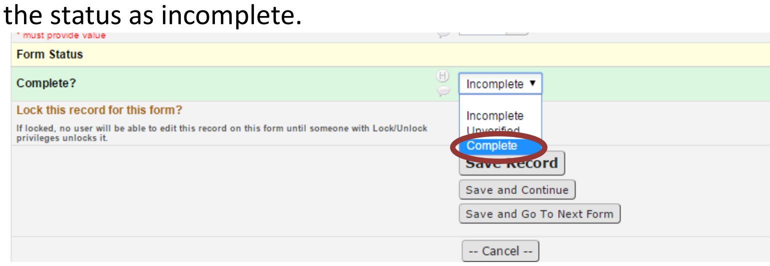


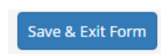
5. Click “Go to Status Update form”.

Status Update Form

1. Note *“All fields you would like to update”* are automatically checked. This is important for PPS Reporting. Fill in all known information.

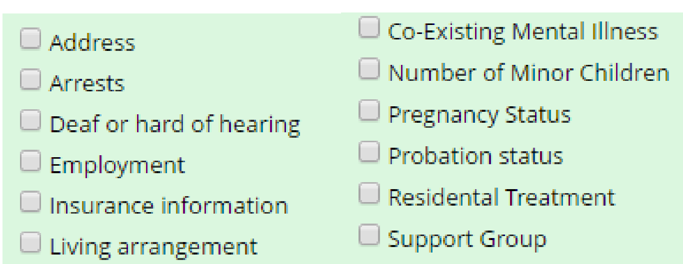
2. If the form is complete, change the form status to Complete. If the form is not complete, mark the status as incomplete.



3. Once this page is complete, click “Save & Exit Form”. 

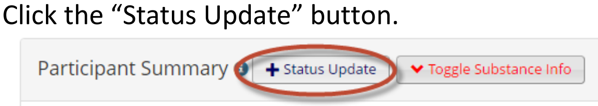
4. You are now on the HOPE Patient Dashboard.

Updating Patient Status:
There may be occasions where the patient status needs to be updated. The following items can be updated at any time.

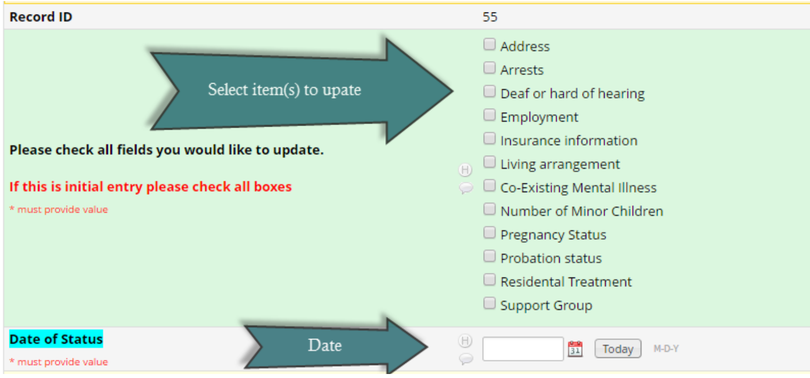


Updating a Status:

1. Click the “Status Update” button.

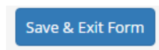


2. Complete the date and select the area(s) you wish to update.

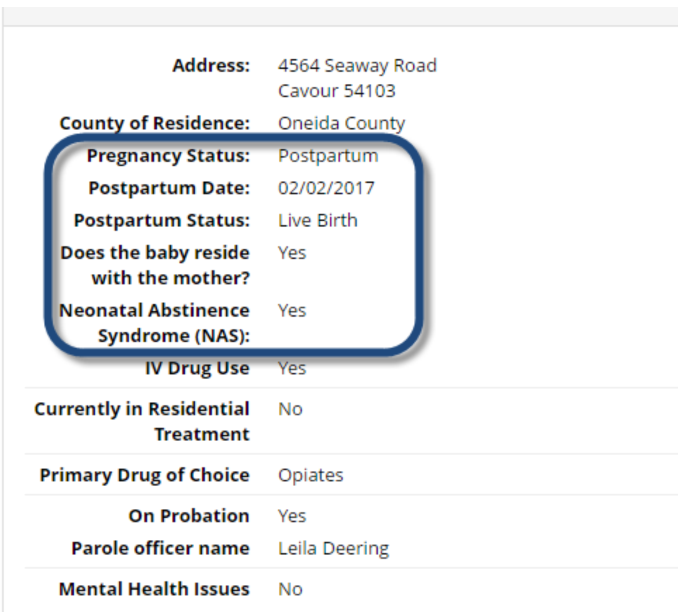


Record ID	55
Please check all fields you would like to update. If this is initial entry please check all boxes * must provide value	Address Arrests Deaf or hard of hearing Employment Insurance information Living arrangement Co-Existing Mental Illness Number of Minor Children Pregnancy Status Probation status Residental Treatment Support Group
Date of Status * must provide value	Today M-D-Y

3. Fill in all fields.

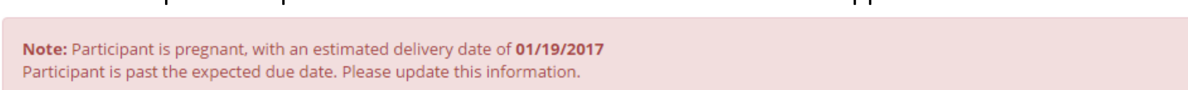
4. Click “Save and Exit form”. 

5. In this example pregnancy status was updated to post-partum. The update now appears in the patient summary.



Address:	4564 Seaway Road Cavour 54103
County of Residence:	Oneida County
Pregnancy Status:	Postpartum
Postpartum Date:	02/02/2017
Postpartum Status:	Live Birth
Does the baby reside with the mother?	Yes
Neonatal Abstinence Syndrome (NAS):	Yes
IV Drug Use	Yes
Currently in Residential Treatment	No
Primary Drug of Choice	Opiates
On Probation	Yes
Parole officer name	Leila Deering
Mental Health Issues	No

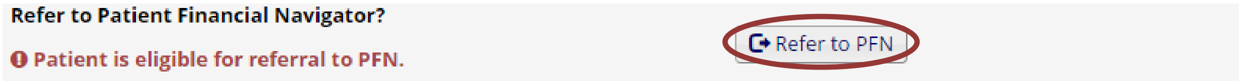
6. Once a patient is past their known due date the alert below will appear.



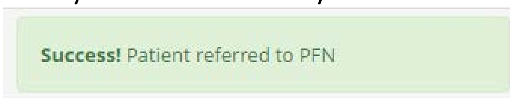
Note: Participant is pregnant, with an estimated delivery date of **01/19/2017**
Participant is past the expected due date. Please update this information.

Patient Financial Navigator (PFN):
Within the status update form there is a refer to Patient Financial Navigator, which is an employee who will work with patients and their insurance information. **When do you refer to PFN?** You refer to PFN anytime you have a patient who has an insurance concern, high deductible, no insurance, or has insurance questions.

1. To refer to PFN click the Refer to PFN button.

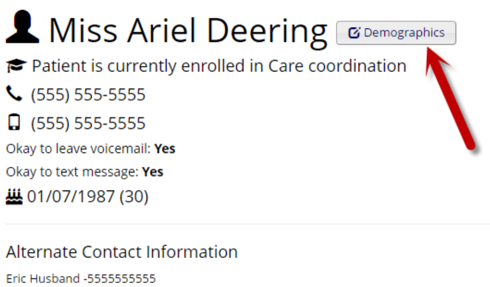


2. Once you click the button you receive a Success message.

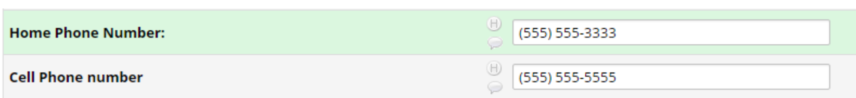


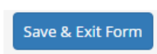
Updating a Phone Number:

1. To update a phone number click on the “Demographics” button.



2. Find the phone number to update, erase the previous number and add the new number.

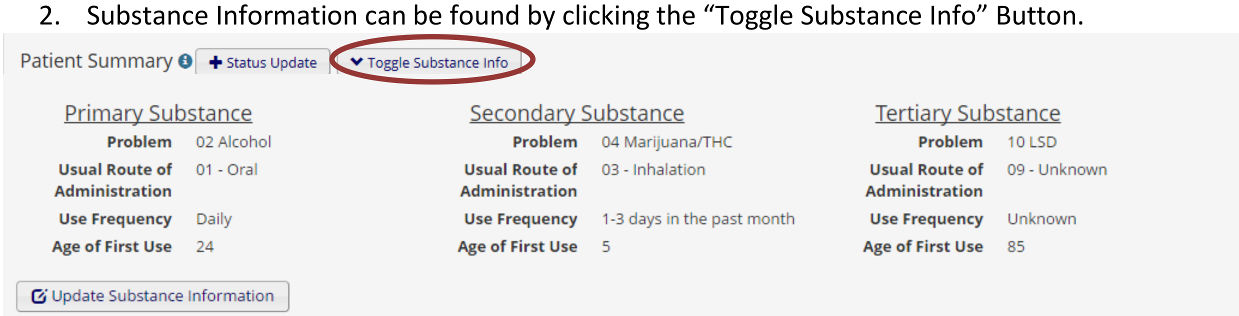


3. Click “Save and Exit form”. 

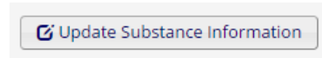
Patient Detail Dashboard Overview

1. The patient detail dashboard gives an at-a-glance view of all patient data from multiple forms. The patient summary information can be updated by clicking the “Status Update” button.

2. Substance Information can be found by clicking the “Toggle Substance Info” Button.



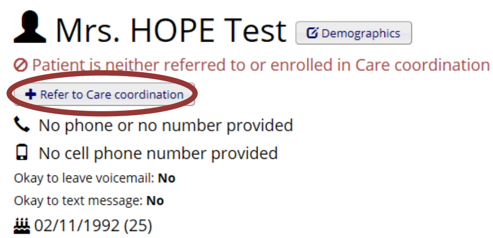
3. To update the Substance information, click the “Update Substance Information” button. You will then be redirected to the demographics form.



Refer to Care Coordination

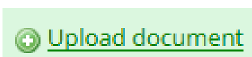
Once the patient is entered into the system they can be referred to care coordination. The following steps will walk you through the referral.

1. Click the “Refer to Care Coordination” button.

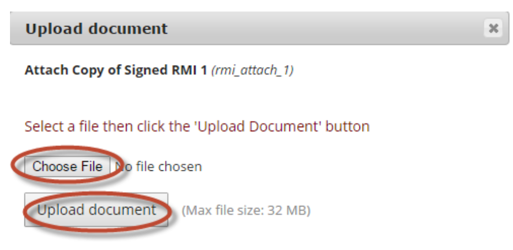


2. Complete all questions on the form.

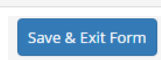
3. Upload a copy of the Release of Medical Information (RMI). First be sure you have the document stored on your computer before uploading. Once the document is on your computer, click “Upload document”.



4. Click browse and find the file saved on your computer. Once the file is selected, click Upload document. *Note: the document cannot be viewed until the save button is clicked.*

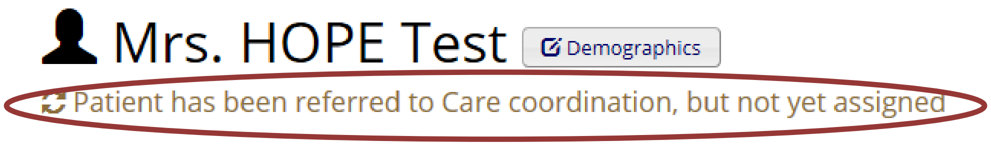


5. If the form is complete, change the form status to Complete. If the form is not complete, mark the status as incomplete.



6. Once this page is complete, click “Save & Exit Form”.

7. You are now redirected back to the patient dashboard. *Note: the message under the patient’s name has changed. The referral has been sent to care coordination and will assign the patient to a care coordinator.*



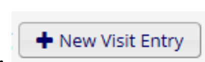
Note: there may be times when the following message is displayed.

This means that the patient has left care coordination for a certain reason. The choice to refer to care coordination is active again and the option to make a new referral to care coordination is available, if needed. The reason why patient left care coordination is available to view by closing the care coordination tab and pushing the toggle button.

Patient Data Entry Forms
Communication Log

The purpose of the communication log is to document visit(s), both attended and no show. The following steps will walk you through completing the communication log.

Creating a New Entry:

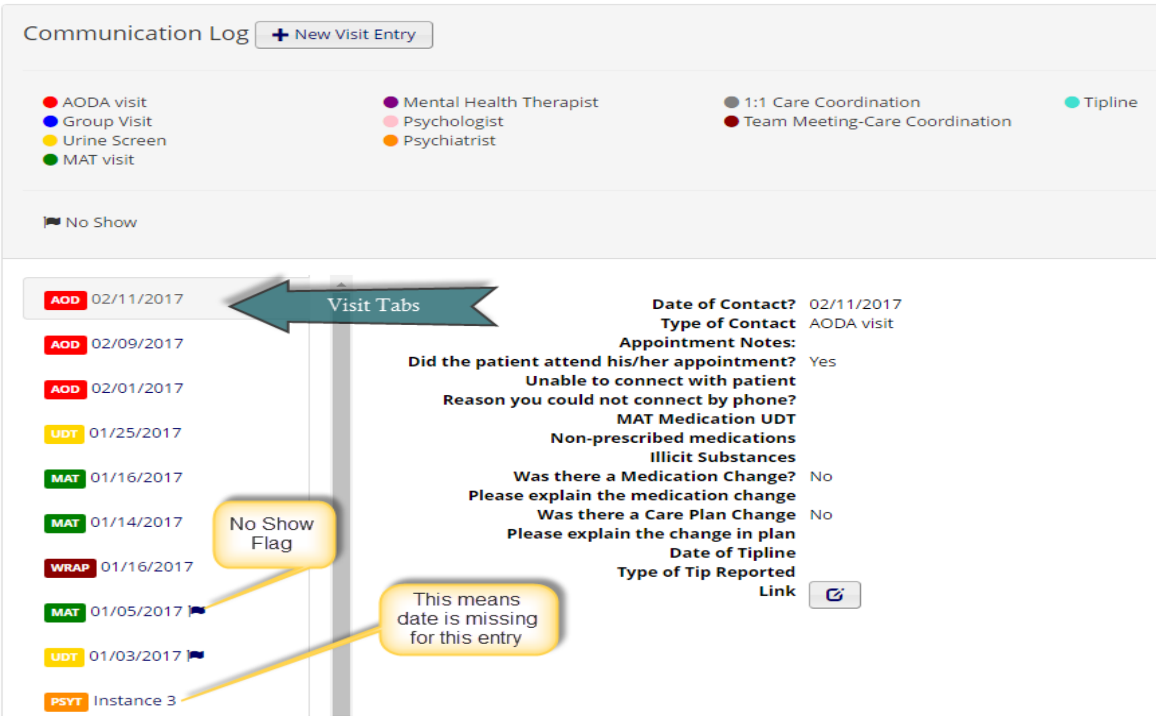
1. Click on Communication Log and select the "New Visit Entry" button. 

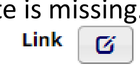
2. Enter the date of the visit.
3. Indicate if the patient attended his/her appointment.
4. Select the type of contact & location.
5. Indicate if there are medication or care plan changes.
6. Enter any brief appointment notes. **Full documentation will be done in the chart.
7. If the form is complete, change the form status to Complete. If the form is not complete, mark the status as incomplete.

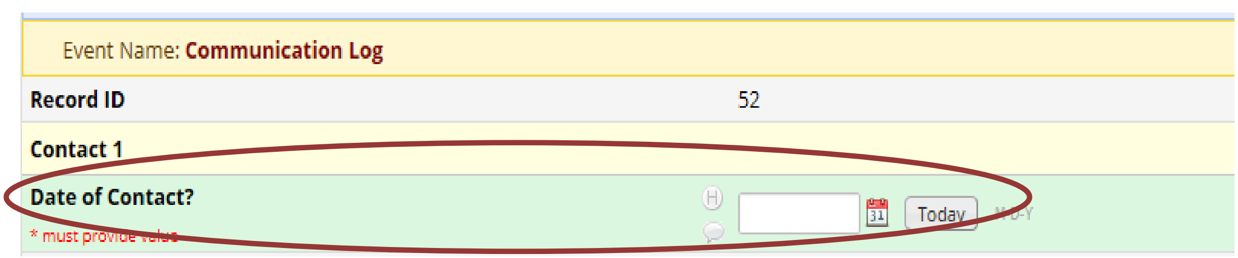
8. Once this page is complete, click “Save & Exit Form”. 

9. You are now redirected back to the patient dashboard. Click on the Communication Log to view the visit you just entered.

Updating a Patient Visit:
Each patient will have a visit summary tab for each visit. A sample summary is shown below and is color-coded by visit type.



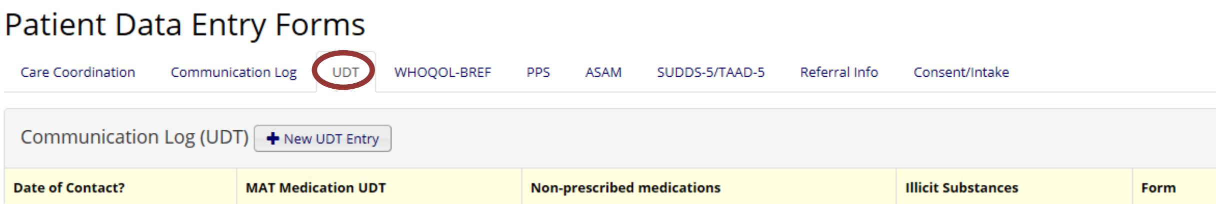
10. If a visit summary tab displays “Instance”, that means that a date is missing. Click on the tab and then click the Link button on the bottom of the log to update. 



11. The tab is now updated with a date.

UDT

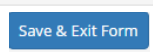
1. To view UDT information click on the UDT tab.



2. This displays all UDT information. To view the form, click  in the form column.
3. To record a new patient visit, click the New UDT Entry button. 

4. Enter the date of the assessment.
5. Complete all questions on form.

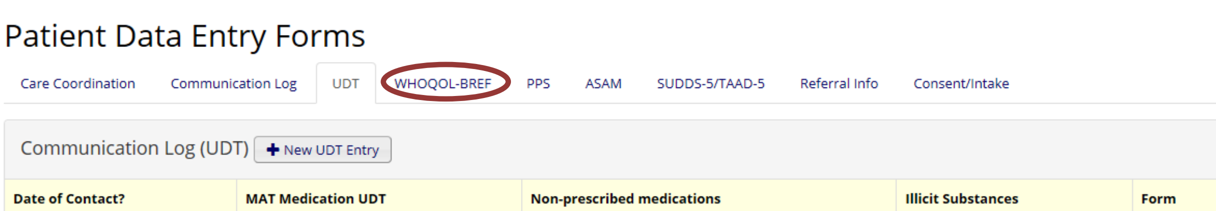
6. If the form is complete, change the form status to Complete. If the form is not complete, mark the status as incomplete.

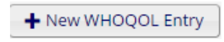
7. Once this page is complete, click “Save & Exit Form”. 

WHOQOL-BREF

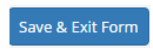
The purpose of the WHOQOL-BREF is to clearly see changes in individual scores over time and report outcomes of WHOQOL-BREF changes.

1. To view WHOQOL-BREF information click on the WHOQOL-BREF tab.



2. This displays all WHOQOL-BREF information. To view the form, click  that is next to the date.
3. To record a new patient visit, click the “New WHOQOL Entry” button. 

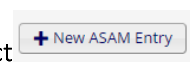
4. Enter the date of the assessment.
5. Complete all questions on form.
6. If the form is complete, change the form status to Complete. If the form is not complete, mark the status as incomplete.

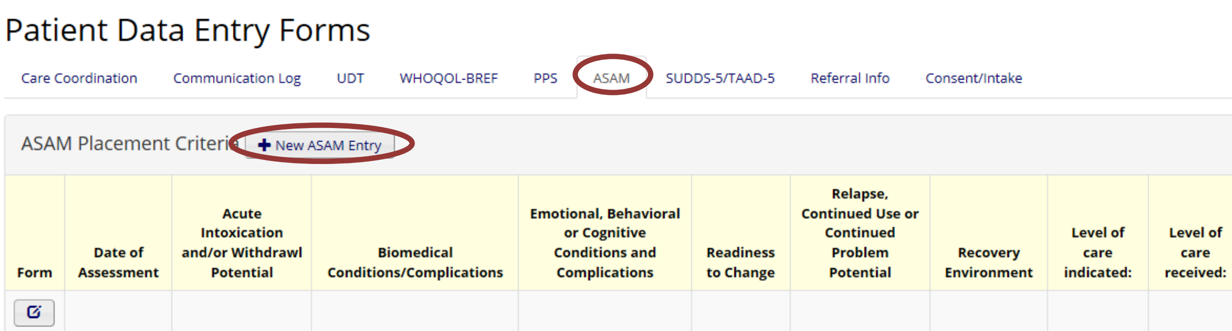
7. Once this page is complete, click “Save & Exit Form”. 

ASAM

This displays the results of each ASAM dimension score and the level of care indicated and received.

Creating a New Entry:

1. Click on the tab ASAM and select .



2. Enter the date of the assessment.
3. Complete all questions on form.
4. If the form is complete, change the form status to Complete. If the form is not complete, mark the status as incomplete.

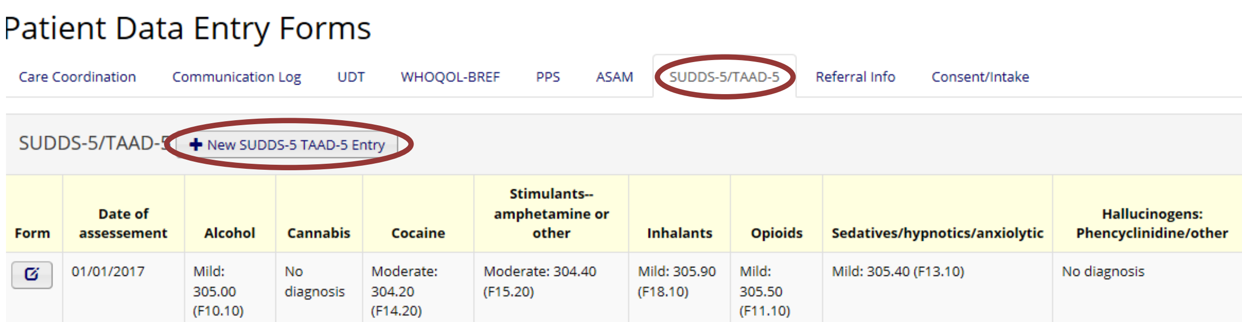
5. Once this page is complete, click “Save & Exit Form”. Save & Exit Form

Updating a Record:

1. If you need to update or view a form, click Form . You will then be taken to the ASAM form.
2. When complete, click “Save & Exit Form”. Save & Exit Form

SUDDS-5/TAAD-5

1. Click on the tab SUDDS-5/TAAD-5 and select + New SUDDS-5 TAAD-5 Entry .



Form	Date of assessement	Alcohol	Cannabis	Cocaine	Stimulants--amphetamine or other	Inhalants	Opioids	Sedatives/hypnotics/anxiolytic	Hallucinogens: Phencyclinidine/other
	01/01/2017	Mild: 305.00 (F10.10)	No diagnosis	Moderate: 304.20 (F14.20)	Moderate: 304.40 (F15.20)	Mild: 305.90 (F18.10)	Mild: 305.50 (F11.10)	Mild: 305.40 (F13.10)	No diagnosis

2. Enter the date of the assessment.
3. Complete all questions on form.
4. If the form is complete, change the form status to Complete. If the form is not complete, mark the status as incomplete.

5. Once this page is complete, click “Save & Exit Form”. Save & Exit Form

Updating a Record:

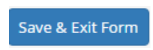
1. If you need to update or view a form click Form You will then be taken to the ASAM form.
2. When complete, click “Save & Exit Form”. Save & Exit Form

Referral Information

The purpose of this tab is to track all referrals for the patient's treatment. Follow the steps below to create a new referral.

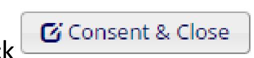
1. Click + New Referral button. 

2. Enter the date of the referral.
3. Complete the questions on the form.
4. If the form is complete, change the form status to Complete. If the form is not complete, mark the status as incomplete.

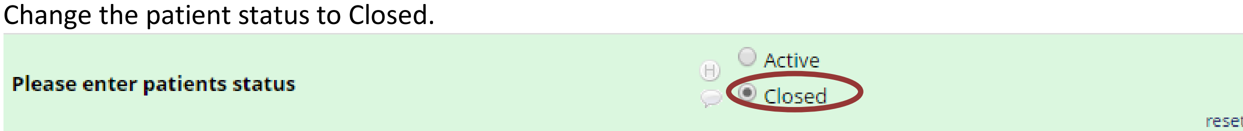
5. Once this page is complete, click "Save & Exit Form". 

Patient Closed Out From Program

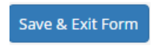
If a patient withdraws consent, completes the program, or is deceased, they should be closed out from the program. *Note: once closed no further data will be collected on a patient and they must be re-consented to HOPE before additional data can be collected.* Complete the following steps to close a patient from the program.

1. Go to the participant detail dashboard and click  .

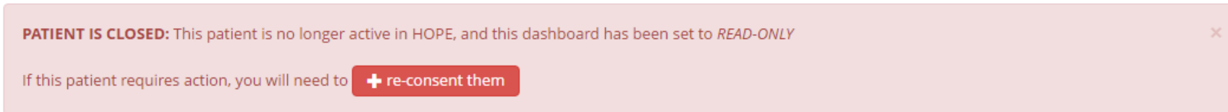
2. You will then be redirected to the consent/intake form.
3. Change the patient status to Closed.



4. Complete the form to close the patient.
5. If the form is complete, change the form status to Complete. If the form is not complete, mark the status as incomplete.

6. Once this page is complete, click "Save & Exit Form". 

7. You will now notice the following alert under the patient's name.

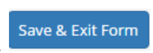


8. Additionally, all other update buttons have been de-activated and you cannot update any information on this patient until they are re-consented.

Re-enrolling a Patient who has been closed out:

1. Click the 

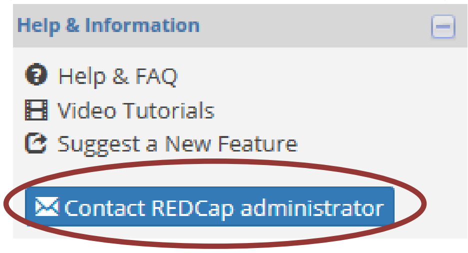
button found on the patient detail dashboard.
2. Complete the consent/intake form and upload new consent.
3. If the form is complete, change the form status to Complete. If the form is not complete, mark the status as incomplete.

4. Once this page is complete, click "Save & Exit Form". 

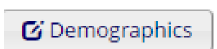
Frequently Asked Questions

Q1. How do I get further help or ask a specific question?

A. The easiest way to ask a question is to look to look at the lower left hand side of your screen under Help & Information. Click the Contact REDCap Administrator button. An email will open. Type your question and the email will be directly sent to the REDCap Support Team.

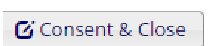


Q2: How do I update a phone number?

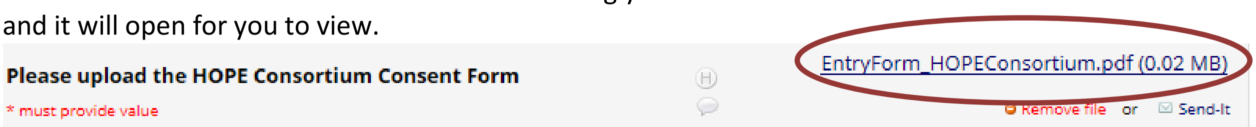
A: Phone numbers are found in the demographics form because we will over write this data. Select the 

button and update the phone number as you see fit.

Q3: How can I see the Consent in the REDCap database?

A: Push the 

button. This will bring you to the consent and intake form. Click the file and it will open for you to view.



Q4: Why is the patient highlighted in red in the HOPE Patient Dashboard list?

A: This means the patient is closed from the REDCap Consortium. You can still view the data but a new consent must be obtained to collect further data.