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# HDPE Consortium

REDCap

Updated February 2017

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# logging into REDCap

- 1. In web browser enter URL: <u>https://redcap.mcrf.mfldclin.edu/redcap/birc/</u>
- 2. Enter username and password.
- 3. Click "Log In".
- 4. Click "My Projects".



5. Under Project Title click "HOPE Consortium".

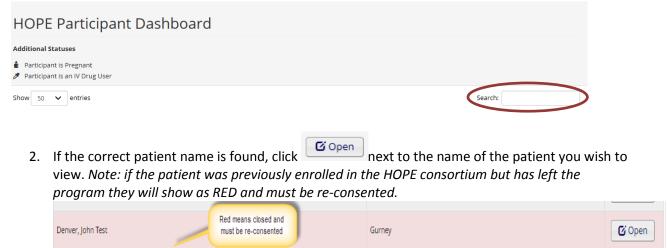
Listed below are the REDCap projects to which you currently have access. Click the project title to open the project. <u>Read more</u> To review which users still have access to your projects, visit the <u>User Access Dashboard</u>.

	Filt	er projects b	y title	
Records	Fields	Instrument	Туре	Status
50	234	13 forms	1	×
	50 Project Bookmarks	Records Fields 50 234	Records     Fields     Instrument       50     234     13 forms	50 234 13 forms

6. Under Project Bookmarks tab click "Dashboard". ➡ Reporting

Searching/Adding a Patient

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



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



4. Click "Add new record".

Total records: <b>50</b>	
Choose an existing Record ID	select record
	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						$\bigcirc$				
Strength Needs Form										
Communication Log										۲
Who-QoL BREF Scored					$\bigcirc$					
PPS Episode Details										
PPS Service Detail				$\bigcirc$						
ASAM Placement Criteria										
Suddstaad									$\bigcirc$	
Referral Information								$\bigcirc$		

### 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".

Upload document

 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.

Upload document	×
Please upload the HOPE Consortium Co (hope_consent_upload)	nsent Form
Select a file then click the 'Upload Docu	iment' button
	Browse
Upload document (Max file size: 32	MB)

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.

Save & Exit Form

Form Status	Incomplete Unverified
Complete?	Save & Exit Form Save &
	Cancel

- 6. Once this page is complete, click "Save & Exit Form".
- 7. Immediately after clicking "Save & Exit Form", the following box will appear.

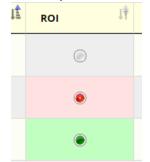


8. Click "Go to Demographics form".

Refease of Information (RDI)

- 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.

Wall, Daniel Michael	Bagdad	<b>o</b> (1	🖸 Open 🌖

- ROI Form 3. Click the button located at the top of the page.
- Enter the Date of the ROI. 4.
- 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".

O 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.

Upload document	3
Please upload the HOP (hope_consent_upload)	E Consortium Consent Form
Select a file then click t	he 'Upload Document' button
	Browse
Lipload document	(Max file size: 32 MB)

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

Form Status Complete?	Incomplete Unverified Complete	
	Save & Exit Form	Save & 👻
	Cancel	

- 8. Once this page is complete, click "Save & Exit Form".
- 9. Immediately after clicking "Save & Exit Form", the following box will appear. New Record (2/3): Missing demographics info!

It appears that you've reached this page in the process of creating a new record. If that is the case, you should head over to the demographics form to continue the initial intake.

Go to Demographics form

Save & Exit Form

10. Click "Go to 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.

- must provide value		
Form Status		
Complete?	H) Inc	omplete 🔻
Lock this record for this form?	Inc	omplete
If locked, no user will be able to edit this record on this form until someone with Lock/Unlock privileges unlocks it.	Lin	mplete
		we kecord
	Sav	ve and Continue
	Sav	ve and Go To Next Form
	(	Cancel

- 3. Once this page is complete, click "Save & Exit Form".
- 4. Immediately after clicking "Save & Exit Form", the following box will appear.

 NEW RECORD (3/3): Missing additional status info!

 You're almost there! Now we just need the additional info that lives in the Status Update Form. To finish the intake process for this patient, let's head over to that form.

 Go to Status Update form

5. Click "Go to 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.

- must provide value	
Form Status	
Complete?	Incomplete •
Lock this record for this form? If locked, no user will be able to edit this record on this form until someone with Lock/Unlock	Incomplete
privileges unlocks it.	Complete Save Record
	Save and Continue
	Save and Go To Next Form
	Cancel

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.

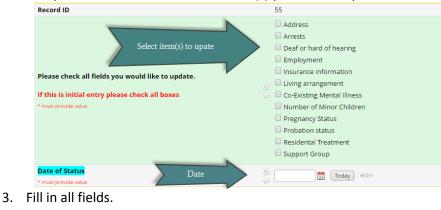
Address	Co-Existing Mental Illness
Arrests	Number of Minor Children
Deaf or hard of hearing	Pregnancy Status
Employment	Probation status
Insurance information	Residental Treatment
Living arrangement	Support Group

#### **Updating a Status:**

1. Click the "Status Update" button.



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



- 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.

Refer to Patient Financial Navigator?	
• Patient is eligible for referral to PFN.	Refer to PFN

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.



Alternate Contact Information Eric Husband -555555555

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.

Primary Sub	<u>istance</u>	<u>Secondary S</u>	<u>Substance</u>	<u>Tertiary Sub</u>	<u>stance</u>
Problem	02 Alcohol	Problem	04 Marijuana/THC	Problem	10 LSD
Usual Route of Administration	01 - Oral	Usual Route of Administration	03 - Inhalation	Usual Route of Administration	09 - Unknown
Use Frequency	Daily	Use Frequency	1-3 days in the past month	Use Frequency	Unknown
Age of First Use	24	Age of First Use	5	Age of First Use	85

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.
- Mrs. HOPE Test © Demographics
   Patient is neither referred to or enrolled in Care coordination
   Refer to Care coordination
   No phone or no number provided
   No cell phone number provided
   Okay to leave voicemail: No
   Okay to text message: No
   O(21/11/1992 (25)
- 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".

Opload 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.

	Save & Exit Form
	Cancel
	Save & Exit Form Save & 👻
Complete?	
Form Status	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.*

Patient has been referred to Care coordination, but not yet assigned

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

O This patient was closed from CC on 12/20/2016. Please complete a referral form to re-enroll them into CC

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.

#### Patient Data Entry Forms

Care Coordination	Communication Log	UDT	WHOQOL-BREF	PPS	ASAM	SUDDS-5/TAAD-5	Referral Info	Consent/Intake

- 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.

Form Status Complete?	Incomplete Unverified
	Save & Exit Form Save & 👻
	Cancel

- 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.

Communication	Log + New Visit Entry	
<ul> <li>AODA visit</li> <li>Group Visit</li> <li>Urine Screen</li> <li>MAT visit</li> </ul>	<ul> <li>Mental Health Therapist</li> <li>Psychologist</li> <li>Psychiatrist</li> <li>1:1 Care Coordination</li> <li>Team Meeting-Care Coordination</li> </ul>	<ul> <li>Tipline</li> </ul>
🍽 No Show		
AOD 02/11/2017	Visit Tabs Date of Contact? 02/11/2017 Type of Contact AODA visit	
AOD 02/09/2017	Appoint Notes: Did the patient attend his/her appointment? Yes	
AOD 02/01/2017	Unable to connect with patient Reason you could not connect by phone?	
UDT 01/25/2017	MAT Medication UDT Non-prescribed medications	
MAT 01/16/2017	Illicit Substances Was there a Medication Change? No Please explain the medication change	
MAT 01/14/2017	No Show Please explain the change in plan	
WRAP 01/16/2017	Date of Tipline Type of Tip Reported	
MAT 01/05/2017 🍽	This means date is missing for this entry	
UDT 01/03/2017 🎮		
PSYT Instance 3		

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.

	Event Name: Communication Log	
	Record ID	52
	Contact 1	
<	Date of Contact? * must provide value	H Today

11. The tab is now updated with a date.



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

#### Patient Data Entry Forms

		T Medication UD		Non-n	rescribed	medications		Illicit Substances	Form
Communication	Log (UDT)	+ New UDT Entry	/						
Care Coordination	Communicatio	Log UDT	WHOQOL-BREF	PPS	ASAM	SUDDS-5/TAAD-5	Referral Info	Consent/Intake	

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

Form Status	Incomplete
Complete?	
	Save & Exit Form Save & 🝷
	Cancel
. Once this page is complete, clic	k "Save & Exit Form".

# WHODOL-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.

Patient Dat	a Entry Fo	rms							
Care Coordination	Communication Log	UDT	WHOQOL-BREF	PPS	ASAM	SUDDS-5/TAAD-5	Referral Info	Consent/Intake	
Communication	Log (UDT) + New	UDT Entr	у						
Date of Contact?	MAT Medi	cation U	т	Non-p	rescribed ı	medications		Illicit Substances	Form

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

	Unverified
Complete?	
	Save & Exit Form Save & 👻
	Cancel

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



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 + New ASAM Entry

#### Patient Data Entry Forms

Care Co	oordination	Communication Log	UDT WHOQOL-BREF	PPS ASAM SUE	DS-5/TAAD-5	Referral Info	Consent/Intake		
ASAN	1 Placement	t Criteri (1 🕂 New /	SAM Entry						
Form	Date of Assessment	Acute Intoxication and/or Withdrawl Potential	Biomedical Conditions/Complications	Emotional, Behavioral or Cognitive Conditions and Complications	Readiness to Change	Relapse, Continued Use or Continued Problem Potential	Recovery Environment	Level of care indicated:	Level of care received:
Ø									

- 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.

Form Status	Incomplete Unverified
Complete?	Complete
	Save & Exit Form Save & 👻
	Cancel



- Once this page is complete, click "Save & Exit Form".
   Save & Exit Form
   Updating a Record:
  - 2. When complete, click "Save & Exit Form".

1. If you need to update or view a form, click

## SUDDS-5/TAAD-5

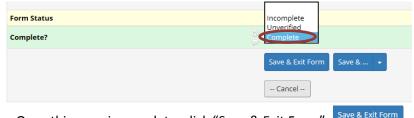
Ø

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

#### Patient Data Entry Forms

Care Co	oordination	Communication	n Log UD	T WHOQOL-	BREF PPS AS/	SUDDS-5	JTAAD-5	Referral Info Con	isent/Intake	
SUDDS-5/TAAD-5( + New SUDDS-5 TAAD-5 Entry										
Form	Date of assessement	Alcohol	Cannabis	Cocaine	Stimulants amphetamine or other	Inhalants	Opioids	Sedatives/hypnotic	ics/anxiolytic	Hallucinogens: Phencyclinidine/other
C	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".

#### Updating a Record:

1. If you need to update or view a form click

You will then be taken to the ASAM form.

You will then be taken to the ASAM form.

2. When complete, click "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.

Referral Information + 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.

Complete?	Form Status	Incomplete
	Complete?	
Cancel		Save & Exit Form Save & 👻
		Cancel

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

Patient Closed Dut 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.

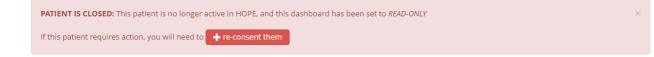
Please enter patients status

- Active
- 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.

Form Status Complete?	Incomplete Unverified Complete
	Save & Exit Form Save & 🔹
	Cancel

reset

- 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 + re-consent them 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.

Form Status	Incomplete
Complete?	Complete
	Save & Exit Form Save & 👻
	Cancel

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.

Help & Information	
Help & FAQ	
🗄 Video Tutorials	
C Suggest a New Feature	
🤇 🖂 Contact REDCap administrator >	)

#### 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 Comparison button and update the phone number as you see fit.

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

A: Push the Consent & Close button. This will bring you to the consent and intake form. Click the file and it will open for you to view.

Please upload the HOPE Consortium Consent Form	θ	EntryForm_HOPEConsortium.pdf (0.02 MB)
* must provide value	$\sim$	🛛 Remove file or 🖾 Send-It

#### 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.