



April 2, 2012

TO: Ontario Children's Mental Health Service Providers

FROM: Alejo Freire, Data Analyst/Researcher, Children's Mental Health Ontario
Brian O'Hara, BCFPI Project Manager, Children's Mental Health Ontario
Cristina Vlad, Data Analyst, Hospital for Sick Children

RE: Exporting BCFPI Data for use in the Annual and/or Quarterly Provincial Reports for BCFPI and CAFAS of the Ministry of Children and Youth Services

The latest most up to date version of these instructions along with expanded 'screen capture' documentation is available at <http://www.cafasontario.ca/data.asp#materials> or on the CAFAS/BCFPI wiki at http://communi-cafas.socialtext.net/admin/index.cgi?exporting_cafas_data. If you get stuck, try checking the web site or the wiki, it will probably give you what you need.

Please note that we are being asked to ensure that centres have complete enrolment data (admission and discharge dates) entered into the BCFPI 'Person' records so we have attached a document explaining in detail how to make sure your dates are in good shape. (http://www.cafasontario.ca/downloads/date_entry_cleanup.pdf). If you have a good method in place and are confident that your dates are entered thoroughly, you will not need to use this document. The screen captures below illustrate the two sections of the BCFPI 'Person' entry routine which are necessary to be filled for when you will complete the enrolment data.

Brief Child and Family Phone Interview - [Person]

Date of Birth: 1992-11-06

Is A Client Is An Informant

1 Address 2 Client 3 Agency/Program Enrolments

Client ID: 1234abcd

Is Multiple Birth

Enter your case number here

Brief Child and Family Phone Interview - [Person]

Date of Birth: 1992-11-06

Is A Client Is An Informant

1 Address 2 Client 3 Agency/Program Enrolments

Agency	Referral	Admission	Discharge
* DEMO VERSION	2004-04-08	2004-07-19	2005-02-01



What to Use as an Admission Date

The admission date in the BCFPI is intended to reflect the date on which the client began receiving service other than that which is offered as part of the initial Intake process. Agencies define the beginning of service in different ways and this leads to significant difficulty when we attempt to analyze these dates to better understand how long clients wait for and spend receiving service. While there may eventually be province wide, ministry provided definitions for these various dates we are using, this is not yet the case. For now, and until we have a better or more official definition, we are asking centres to use a definition that is as close to the following one as possible.

Admission date = 'The date on which the client begins receiving a regular, ongoing, core service or a service which meets the client's current needs'

This is not a bullet proof definition, just the best one we've come up with so far. Many centres provide initial counselling sessions of limited duration which prove to be adequate to meet some clients' needs, while other clients complete these sessions and then join a waiting list for 'regular ongoing core service'. We are suggesting that for the purposes of tracking waiting times, the clients for whom the brief intervention was enough should have the date they started those sessions used as the Admission Date in the BCFPI record, and those who joined a waiting list for a more substantial service should have the date they started that more substantial service entered as their admission date to service.

Obviously, if your centre has used a different scheme for determining the admission date, and you have hundreds or thousands of entries in the BCFPI Person section, re-entering all those dates to conform to this definition is not a reasonable task to take on at this time. However we would very much appreciate it if you would let us know if you believe that your definition of the admission date is substantially different from the one above and we would like to see what your definition is. If you are not sure, send it along and we'll get back to you. Send a message with your admission date definition or question about this issue to 'Alejo Freire' <alejo@cmho.org>. We're not looking for absolute conformity here, just trying to receive and provide as accurate information as possible. As well, this scheme is intended for use in the province wide BCFPI/CAFAS data gathering exercise and if your agency has for its own use a different or more complex routine for establishing these dates, that's none of our business.

Exporting your accumulated BCFPI data for an anonymous report:

1. As a first step, create a folder in which to store your export file(s). Make sure you understand how to navigate to this folder.

For the experienced data exporters, We would suggest you continue to use a consistent 'master folder' to store all your BCFPI export files, and create a new folder within it named something like 'BCFPI last export' (or a name that will reflect the current export) to hold the two files - export.zip, aggind32.mdb that will be created.

If this is your first time doing a BCFPI export, see the note later in this message for detailed instructions and background information about setting up to do an export.

2. Start the BCFPI application.
3. From the menus at the top of the screen, select 'TOOLS \ EXPORT FROM DATA' You will then see a window named 'Choose the Export Directory'.

In the top frame of the 'Choose the Export Directory' window, select and open the folder referred to in #1, above. This is usually done by double clicking on the folder icon. When the folder is selected, its icon will look like a folder that is opened

4. In the bottom section of the screen there are now two sections which are accessed by clicking on the two tabs named 'Export options' and 'Filters'. Initially, the 'Export Options' tab is in the foreground.

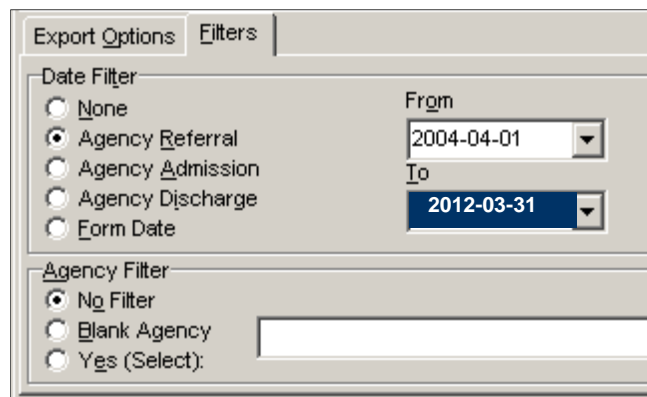
In this 'Export Options' section:



- a. Check 'Compress output'(this makes file smaller and easier to send via e-mail). Attention! Do not use compress if this file will be merged with other files before it will be sent to e-mail. This is the situation of the agencies that collect databases from more than one site/agency/laptop and these separate export databases will be merged into a single database before being sent via e-mail. See more instructions about merging databases into an aggregate database at the end of this message.
- b. (Recommended) If you want to create an uncompressed copy for yourself, check 'Keep Uncompressed files'. This is not a bad idea in case there is a need to review some aspects of what you sent us, or in case you want to have access to an identical set of data to verify what we report about your centre
- c. (Optional) The BCFPI software now includes the option to include a password with your BCFPI export data file. Please check the password in the latest communication. New passwords will be communicated each time prior to the submission time.
- d. Uncheck 'Include client names', 'Include Question Comments' and 'Include Free text Answers' (this removes client names and other identifying data from your exported data)
- e. Uncheck Include Full Address and then uncheck all of Include City, Include Geo Code 1, and Include Geo Code 2.
- f. In the 'Export Postal/Zip Code' section, check 'Don't Export'.

Click on the tab named 'Filters' – the 'Filters' section will come into the foreground – In this 'Filters' section

- g. In the section labelled 'Date Filter' click in the bullet beside 'Agency Referral' and insert the dates **2004-04-01** in the 'From' section, and in the 'To' section enter **2012-03-31** (96 months). This set of dates is pertinent to the export **2012.1**.



Please refer to the schedule for other submission dates: <http://www.cafasontario.ca/data.asp#schedule> or the wiki at: http://communi-cafas.socialtext.net/admin/index.cgi?exporting_cafas_data#exportschedule).

- h. N.B. the BCFPI software uses the date format settings as set for your computer – the order of the day/month/year may not look the same as in the screen shot – if you are not sure that you are doing it correctly, click on the arrow/triangle beside the date to bring up the calendar-based date entry utility – this will give you an un-ambiguous look at what the date is. **Please double check that the 'Date Filter' choice of 'Agency Referral' has remained activated – sometimes an inadvertent mouse click can select one of the other options – it is really easy to do unintentionally.**



- i. Unless you are a centre that does BCFPI interviews for other centres, ignore the 'Agency Filter' section which should remain set to the default 'No Filter'. If you do have multiple centres in your data base and wish to export them separately, you can select the specific agency to export in this box.
- 5. Click the green checkmark at bottom right.
- 6. Select 'OK' when asked to confirm the export and its location. If you are then asked if you want to replace any files, you will be erasing some previously exported data - if you are knowingly and intentionally doing this, proceed - if this isn't what you thought you were doing, stop by clicking 'No' and re-read the instructions about setting up folders for your data.
- 7. You'll see moving bars on your screen as the export proceeds. A message appears when the export is complete confirming where the file has been stored.- Click OK in that message box. A second message will appear reminding you that this 'just completed' export will now be the one used when you run plug-in reports - that's OK, just proceed.
- 8. Exit or minimize the BCFPI application and check the directory you've created in #1, and you should see a file named 'Export.zip' if all went well. DO NOT rename this file. If you see a file named 'aggind32.mdb' that's OK too, this is your uncompressed copy of the export. It would probably be advisable to rename this file to something that will remind you when and why you created it.
- 9. Also; if you are doing any manipulation of the exported data before you send it or merge it with other exports (for instance, to populate admission or discharge date fields from your agency information system), please be sure to preserve the original Access version of the database. If you open the database in a more recent version of Access, do not choose to 'Convert' the database to your version's format – this will make it impossible for us to work with.
- 10. Send the file to Alejo Freire as per the instructions below.

Identify your Export files in the Subject line of the Email!

We will be using the email subject lines to organize the exports from over 120 centres and so it is important that you follow these instructions. The email subject line **should** read:

BCFPI - Submission Date (dd/mmm/yyyy) - Agency name - [site name, if applicable]

Here it is
an
example:

To:	alejo@cmho.org
Cc:	
Bcc:	
Subject:	BCFPI-9/Jan/2012-MediCare Toronto–Main Site



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Additional instructions not needed by most users.
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Notes on creating a folder to store your BCFPI exports

You can create the folder for storing your BCFPI data anywhere on your hard drive or on the network where you (and perhaps others) can access it. It mainly needs to be somewhere you can find in later steps. One thing to understand is that the exported files are always given the same names by the export utility - they are always named 'export.zip', 'aggind32.mdb'. Accordingly, if you attempt to export data to the same location more than once, you would be forced to replace (= erase) the preceding export files in order to create the new files. Assuming that you may want to keep some older exports, ... and ... that over time you could have many sets of these exported files ... and ... that you will need a way to distinguish which files are which, a method of differentiating between otherwise identically named files is needed. What would seem to work is to create a single folder inside which you create a new folder each time you do an export, giving the folder a name that tells you the date of the export. e.g. 'BCFPI_export_Oct_2011' or whatever works for you. You could probably leave out the 'BCFPI_export' part if you keep these folders in a folder named something like BCFPI_exports. If when you export your data, you are asked if you want to replace any files, this means that you will be deleting a previously exported file. Please create your back-up files (renaming them in the ways suggested above) only after you have exported the file with the default name 'export.zip'

Notes on what to do when you have difficulties sending BCFPI files through email:

- If you encountered problems related to the encryption or archiving (bounced email returning a message about a possible virus threatening or a .txt file replacing your .zip file):
 - Redo the export and choose not to encrypt (do not use passwords)
 - Rename the file from Export.zip to Export.xyz or change the .zip extension to three other letters (except.exe, .bat, .com).

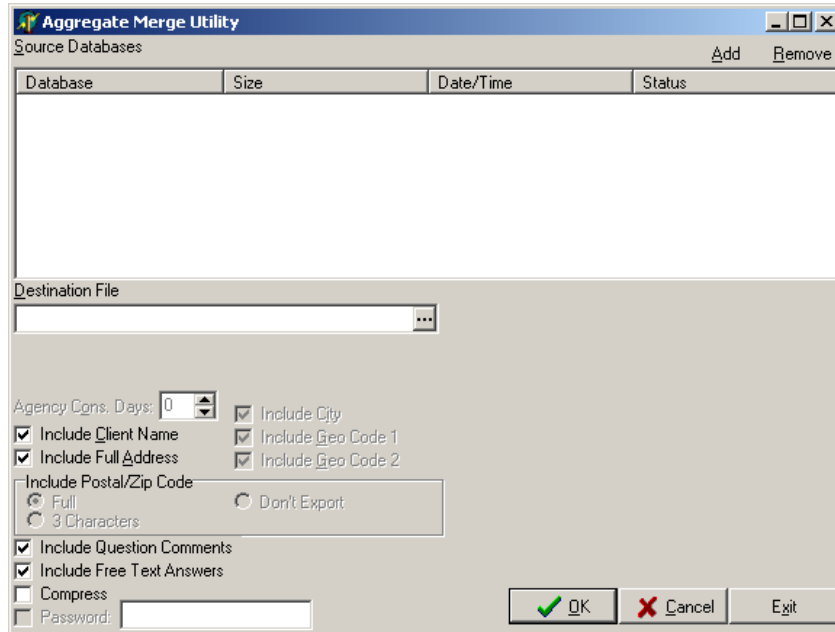
Please ensure that your BCFPI enrolment data is up to date. This means making sure that the admission and discharge dates relating to any clients with referral dates on or after April 1, 2004 are entered into the BCFPI 'Person' records before you do your export.

Notes on merging databases (using the Aggregate Merge Tool) – not used by most of the agencies!

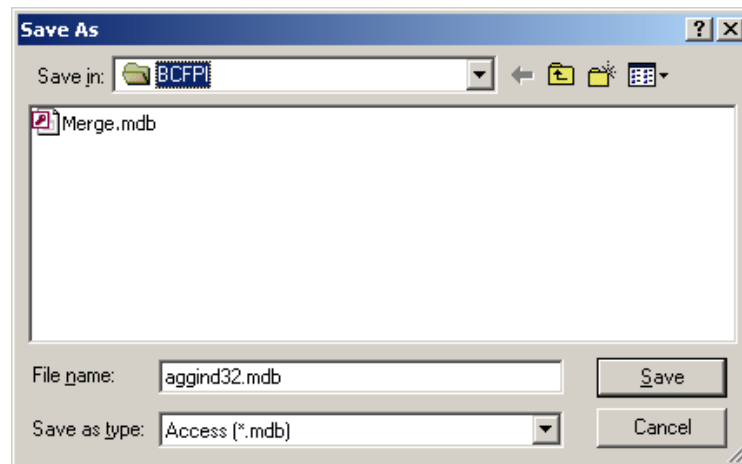
Attention!

If you choose to merge the files into an aggregated database, be sure that you do not compress the individual databases that will be merged.

- 1) Go to Start/Programs/Indicator32/Aggregate DB Merge Tool
- 2) You will see the Aggregate Merge Utility Window open (see below)

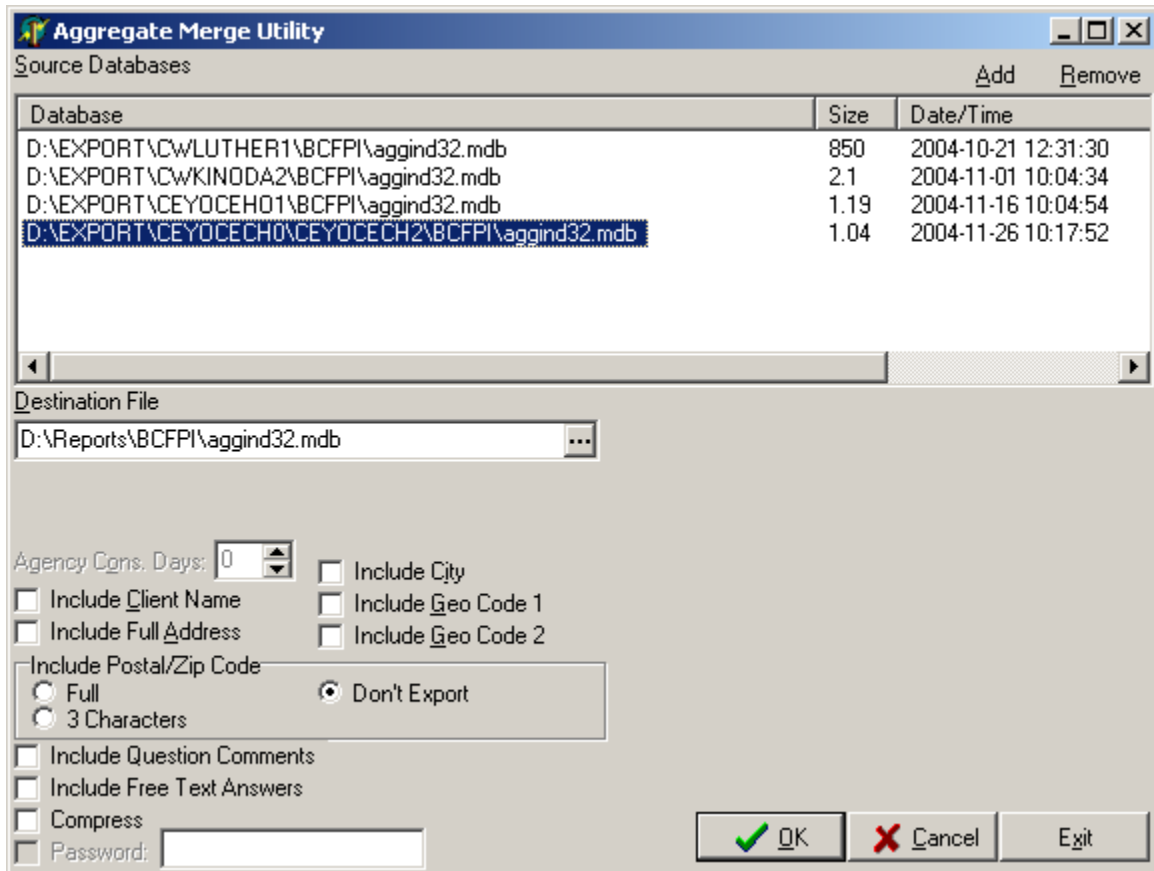
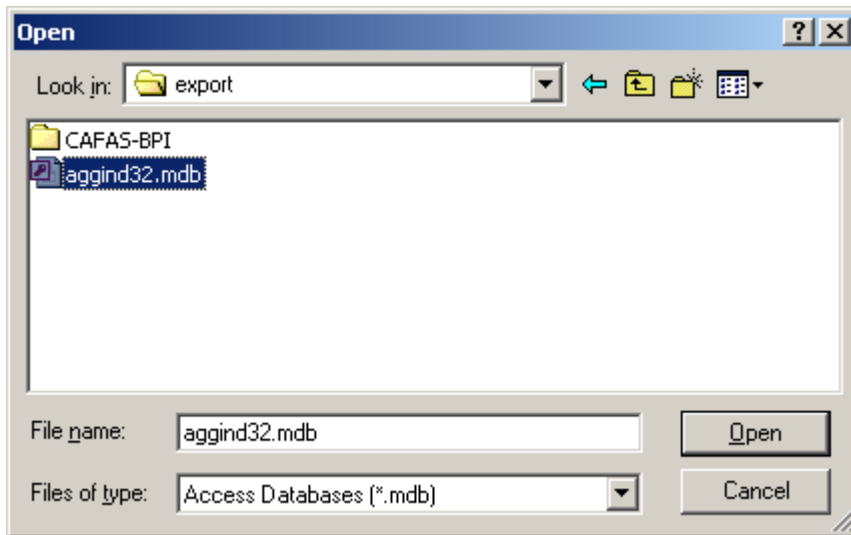


- 3) Click on the Destination File area. A new file named 'aggind32.mdb' will be generated and you are asked to save it to a destination location. Please use the drop down list provided in the 'Save in:' area to choose the destination folder. Choose Save.



Even if it is assumed that the identifying information was removed at the individual export stage, it is recommended to continue with the next step:

- 4) Uncheck 'Include client names', 'Include Question Comments' and 'Include Free text Answers' (this removes client names and other identifying data from your exported data) . Uncheck 'Include Full Address', then uncheck 'Include City', 'Include Geo Code 1', and 'Include Geo Code 2'. In the 'Export Postal/Zip Code' section, check 'Don't Export'.
- 5) You can choose to compress the resulted database (aggind32.mdb) and use the password you have received in the latest communication to encrypt it before sending it out.
- 6) Press the Add button (located in the upper right corner of the main window) to start adding the individual files. Please locate the databases from individual agencies/sites/laptops by using the drop down list in the 'Look In' area.



7) Press OK. Wait for the program to finish the merge. Exit the application.

You will now have a single file that contains all the data from those files that were merged. You will still be able to distinguish which 'site' or 'agency' is associated with specific records.

8) Send the file Export.zip or aggind.mdb to **Alejo Freire** at alejo@cmho.org.



If you would like assistance with these export procedures, please call or email and help will be provided to you.

Alejo Freire: alejo@cmho.org

Brian O'Hara @ (416) -921-2109 ext.26 or brian@cmho.org