A Method for Cleaning Up BCFPI Admission and Discharge Date Entries

1. Do an export. << Tools | Export Form Data >> You may have done this quite a few times, and you just need to set the parameters to suit this purpose. Leave the “Include Client Names” selected as you will not be sending this export outside the agency and you will need the names to do the work. The only question may be what dates to "filter" on. If you just export all the clients’ information in your system, you may get too long a list. On the other hand, the discharge dates people are entering could be for clients who were referred several years ago. And.. you may have a cutoff date where you know you don’t need to update clients before a certain point. I'd say set the export filter using the "Agency Referral" and set the date range to ... From: January 1, 2003   To: Today ... in whatever date format your system likes to use - the BCFPI uses your system's preset date format for data entry. Don't compress or password protect the file, and because you're using it internally, you leave ALL the other settings at their default.

2. The BCFPI software will automatically set itself so that the plug-in reports will use this most recent export for the report you are about to run (it will remind you that it is doing that at the end of the export process).

3. Run the "Detail" plug-in report.

   Go to << View | Reports | Plug-in Reports | Detail. >>

   There are a number of parameters that can be set at this point. For our purpose, which is to create an inclusive list of all the clients registered since our start date, we only have to worry about the dates in the first screen. Here again, for reasons I won't bore you with, you should set the From date to April 1, 2003 and leave the To date at the default = Today. You can leave all the other settings and just click the green check mark.

4. After the computer spends some time "crunching numbers", an Excel document named "Untitled 1" will open up with the "Title Page" sheet in the front. This document has three component "Worksheets", which are accessed by clicking on tabs with their names located at the bottom left edge of the window. They are named 'Title', 'Detail' and 'Legend'. Click on the "Detail" tab to see the list of clients. This detail report pulls out most of the interesting bits of information for each client and collects them in one large sprawling grid.

5. To modify this list so that it will help you sort out which clients' admission and discharge dates have been updated fully, we need to change things so that it will print out in a useable way. Fortunately, we don't have to sort the rows because the default arrangement is to be sorted by referral date with the earliest date at the top of the list. Next we will choose which columns of data to print and which to hide. Do these steps.

   i.) Right-click on the "A" at the top of the first column. The entire column will be selected, and a "Contextual menu" will appear. Choose "Hide" from the contextual menu.

ii.) Now the "Agency" column, still column "B" will be at the left side of the document. Unless you have multiple sites and are working with a merged multi-site database every cell will contain the name of your agency. So we might as well hide this column too. Right click on the "B" and choose "Hide"

iii.) Now "DateReferral", is the left most column followed by "DateAdmit", "DateDischarge", and then "Name". If this placement of the Name column to the right of these dates is acceptable to you, skip the next step (iv.) and go to Step "V". If you want to move the "Name" column so that it is at the left edge of the document do this next set of steps.

iv.) (Optional) Click on the "C above the "DateReferral" column.
From the "Insert menu, choose "Column" - A new empty column will appear to the left of column "C"
Click on the "F" above the "Name" column
From the "Edit" menu, choose "Cut"
Click on the "C" of the empty column. Choose Paste.
Now the clients' names will be along the left edge of the document, in the format "Last, First"

v.) Now that we have the four left most columns containing the information we need, we can choose to print only these columns. Click on the A of Column A to select the entire column. Hold down the shift key and click on the D of Column D. The first four columns will be darkened and they are selected. Go to the File Menu and choose Print Area > Set Print Area. The selected columns will now be the only ones that will print giving you a more useable print out.

6. You should now have a document consisting of four columns with the clients' names in either the left most or right most column.

6a. If you are familiar with the BCFPI software, you may remember that in the Person view, the clients' names (when you have a list of names) are sorted by Last Name. We need to replicate this in our list for the final stage of the updating process, so in effect we want to "Sort" our list by "Client Last Name". We want to work with all the rows of data so we need to "Select All" of the rows and columns. To do this in an Excel spreadsheet, click on the rectangle in the upper left hand corner of the document. (just to the left of the "A" of Column A and just above the "1" of Row 1). All the cells should turn grey or whatever colour selected items turn on your computer. To arrange the rows alphabetically by last name, go to Data=> Sort. You will then get a mildly confusing dialog where you can select which column you want to sort by and in what order. We're going to choose the to have the "A's" at the top of the list (known in most circles as alphabetical order ;-) by clicking on the arrow for the drop down menu in the "Sort by" box, choosing "Name" as the column we want to sort by and leaving the default choice "Ascending" selected. Click OK and the list should re-arrange itself by client last name, with the "A's" at the top of the list.

6b. Save this document with a very self-explanatory name, like "BCFPI Names and Dates June 30_2005"

6c. Print this out to use for the verifying and updating process.

7. Assuming that you have an agency Client Information System that has accurate referral, admission and discharge data, you should request a "Report" with the same information as you have in the printed report. The easiest way to do this would be to show the print out we just made to whomever you think could create the report for you from the information system and ask them to create a similar one for the same date range. Other than having the same information in the same columns, you need the information to be sorted by the last name of the client, and preferably if possible with the client name in the same format, "Last, First"

8. Now the manual slogging starts. Someone, not necessarily a clinician, needs to go through the two lists and match up client names and see if the admission and discharge dates from the Client Information System have been entered into the BCFPI. The two most frequent situations are to do either a major catch up where you need to add dates for most or all of the clients, or alternately to do an update where only a relatively small percentage of BCFPI Person records need to be updated.

   If you know that most of your clients' information is up to date in the BCFPI and you just want to tidy up a few late or missed entries, then it is probably more efficient to use the two printed lists to identify which ones need updating, highlight the changes needed on the CIS list, then use it to pick out only those who need changing in the BCFPI database, and make the changes for the clients who need changes.

   To do this, get a list of all clients in the Person records by typing a percent sign "%" in the Last Name field of the Person Finder and typing Return/Enter or clicking on the “Search” icon. Moving down the list to those clients whose names are highlighted on the CIS list, open each client’s Person record whose information needs updating by double clicking on the client's name to open the Person information, click on the Agency/Program Enrollments tab, enter the dates that are missing, save the changes, and close that client's Person window. Making sure you indicate on the CIS list that you've completed that client, repeat the process as needed.

   If you know most or all of your BCFPI "Person" records do NOT have complete admission and discharge data entered into the BCFPI database, it would probably make sense to enter missing data into the BCFPI software from a list created from your centre's Client Information System. You would take a list that you got from the client information system and using the BCFPI software, and remembering that there may be clients registered in the CIS that are not in the BCFPI data base, open each client by double clicking on the client's name to open the Person information, click on the Agency/Program Enrollments tab, enter the dates that are missing, save the changes by typing Control-S, and close that client's Person window. As you can see, if you have a very large data base of BCFPI clients and they ALL need to have their dates entered, this will be a "non-trivial" task. Again, this is not a task that needs to be done by a clinician.