

Opioid and Naloxone Education

**REDCap User's Manual** 

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# **ONE Program REDCap Training Guide**

# Introduction

Welcome to One Program! One Program is using the REDCap secure web application for data collection. It allows for multiple ways to collect data and provide real time reporting. Your pharmacy has the option of allowing patients to complete the <u>Patient Intake Form</u> online (using their phone, other handheld device, or computer) or via <u>paper form</u> that pharmacy staff will later need to enter into REDCap. Pharmacy staff will also complete the <u>Outcomes Worksheet</u> within REDCap either online in real time or retrospectively using the <u>paper version</u>. Thank you for your participation in this valuable project to proactively help patients and communities by providing resources to pharmacists to educate about opioid misuse and accidental overdose.

# Support

Training modules providing an overview of REDCap are available on the ONE Program website.

For questions on REDCap data entry please contact Jayme Steig (jayme.steig@ndsu.edu, 701.231.1878.)

For technical questions related to access REDCap (password resets, firewall issues, etc) please contact Jon Gardner (jgardner@qualityhealthnd.org, 701.989.6237).

# **Getting Started**

# **Enrolling Pharmacy**

Pharmacies interested in participating in program should complete the online <u>enrollment application</u>. Within 7 days of enrollment submission, your pharmacy's REDCap login and password will be emailed to the email address provided on the enrollment application. Please check your email for message from <u>redcap@qualityhealthnd.org</u> for REDCap login information. Please add this email to your safe list to prevent it from being routed to "junk" folder. You email will receive two e-mails:

- 1. REDCap access granted –contains your username along with a link and directions to set your password. Usernames and passwords are at pharmacy level. Please set accordingly.
- 2. REDCap project approved confirms your REDCap account and provides additional project information.

# **REDCap Login**

The address to login to the REDCap secure web application is <u>https://redcap.qualityhealthnd.org</u>. Username and password will be at pharmacy level. It is your responsibility to follow your pharmacy's security guidelines regarding use of logins and passwords. Passwords can be reset under <u>My Profile</u>.





Figure 1- Login Screen

# Navigating REDCap

# Menu Bar Overview

Upon logging into the application, the menu bar at the top of the screen can be used to navigate between application features.

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6 0 0 0	Secure   https://redrop.gaalitybealthed.org/index.php	* O 🛛 I
REDCap	I are the French and a second	Long of a set the Portland Log out

*My Projects* – <u>click</u> on this menu item to access the ONE Program data collection instruments.

*Help* & *FAQ* – this menu item has information primarily for software developers. You may not find the assistance you need here. Please use this manual or contact <u>support</u> for additional assistance.

*Training Videos* - this menu item has information for software developers. You are unlikely to find any assistance here. Please use this manual or contact <u>support</u> for additional assistance.

*Send-It* – is a secure data transfer application that allows you to upload a file and allow multiple recipients to download the file in a secure manner. Each recipient will receive an email containing a unique download URL, along with a second follow-up email with the password (for greater security) for downloading the file. ONE Program project staff may use this feature to send secure files to your pharmacy.

My Profile - this menu item is used to update any account information and to reset your password

# My Profile

This is the location to reset your password and password recovery question. To do so, select My Profile from the Menu Bar. Under Login-related options, select reset password and follow directions to reset your password.

REDCap	×	
← → C 🔒 Sec	oure   https://redcap.qualityhealthnd.org/redcap_v8.7.0/Profile/us	er_profile.php
REDCap	Home IB My Projects I Help & FAQ IB Training Videos	Send-It
		prmation below. This information will not be given out to anyone but will be used to Cap and also in case you need to be contacted regarding your access to REDCap.
	First name:	Training
	Last name:	Account
	🖂 Primary email:	info@quaityheaithnd.org
		Save Basic Info
	Login-related options:	
	Reset password Reset password n	ecovery question



# My Projects

This Menu Bar item is used to access the ONE Program project to access resources, enter and view data, and view reporting specific to your pharmacy. From the My Project screen, simply click on "ONE Program – Opioid and Naloxone Education" to access the project. Once you access the project, you can return to the Menu Bar by clicking on the REDCap icon in the upper left-hand corner of the screen.

REDCop	×								
< → C   • %	cure   ht	tps://redcap.qua	lityhealthnd.org/	/index.php?action=myprojects					
REDCap	Home	My Projects	O Help & LAQ	🔁 Training Videos 🛛 Send-R					
				REDCap projects to which you currently have a		the proje	ot. Read more	NO LIGNIC	sw which
				REDCap projects to which you currently have i is to your projects, visit the <u>User Access Dashb</u>		the proje	ot. <u>Read more</u>	RO HEVIS	ew which
		user					A <u>Read more</u>		www.c
		M	rs still have acces	ss to your projects, visit the User Access Dasht	card.			y Ude	

# ONE Program – Opioid and Naloxone Education Project Home

# **Project Home Screen**

There are many user features within REDCap projects. Not all features are needed by pharmacy users for the ONE Program project. Items with a X are features pharmacy users will not utilize. An overview of features is below.





Record status dashboard - one for ORT and one for outcomes worksheet

Figure SEQ Figure \\* ARABIC 5- Project Home Screen

### **Ouick Tasks**

The Quick Tasks box at the top of the body of the home screen is a list of shortcuts for items available in the Navigation Menu on the left-hand of the screen. Green arrow indicates quick task location in the navigation menu.

*Codebook* – this is for software developers and will not be needed by pharmacy users

Export Data – All ONE Program participants have access to pre-programmed Reports in REDCap and Companion Tool reporting through Microsoft Access. The pre-programmed reports in REDCap can be accessed through the Export Data quick task.

# **Project Dashboard**

The tables in the dashboard provide general information such as project statistics.

# **Navigation Menu**



OUD Red Flags Identified Today

OUD Explained to Patient

The Navigation Menu runs along the left-hand side of the Project screens and contains all the tools users will use to complete ONE Program data collection and view results. An overview of tools is below.

**REDCap logo or My Projects** – will return you to application home screen with Menu Bar to view My Profile or use Send It.

Project Home - returns you to Project Home Screen from any open tools

Project Setup - this is for software developers and is not needed by pharmacy users

### **Data Collection**

Public Survey Link - this feature is used by pharmacies utilizing Online Patient Intake Form for data collection.



*Record Status Dashboard* – allows pharmacy users to view all Records (patient entries) in system and identify the status (complete, incomplete) of the <u>Patient Intake Form</u> and <u>Outcomes Worksheet</u>.

*Add/Edit Records* – allows pharmacy users to enter new Patient Intake Forms and Outcome Worksheets or edit existing records. This tool will be most used by pharmacies utilizing <u>Paper Patient Intake Form</u> for data collection.

### **Applications**

*Data Exports, Reports, and Stats* – pharmacy users can review pre-programmed <u>Reports</u> in REDCap via this menu.

File Repository – this feature is used by developers and is not needed by pharmacy users

*API* and *API Playground* – API will be used to get key for the use with the Companion Tool. API Playground is for software developers and is not needed by pharmacy users.

**Project Bookmarks** – this section contains links to ONE Program project resources. Bookmarks include, but are not limited to:

- Companion Tool (Access) –links to a Microsoft Access file that allows for more detailed and customizable reporting. Computers that do not have Microsoft Access installed can use the Microsoft Access Runtime Edition bookmark to download a free version that will run all Companion Tool functionality.
- Microsoft Access Runtime Edition link to download a free version that will run all Companion Tool functionality
- ONE Program Project Website link to ONE Program project website with access to all program materials (training, documents, resources, etc)

Reports - pharmacy users can review pre-programmed Reports in REDCap via this menu.

Help & Information - You may not find the assistance you need here. Please use this manual or contact <u>support</u> for additional assistance.

**Contact REDCap administrator** – use this link to create an email to send to <u>support</u> for additional assistance.

# Entering Data in REDCap

ONE Program has two data collection instruments, the <u>Patient Intake Form</u> (completed by patient) and the <u>Outcomes Worksheet</u> (completed by pharmacist). Your pharmacy has the option of allowing patients to complete the <u>Patient Intake Form online</u> (using their phone, other handheld device, or computer) or via <u>paper form</u> that pharmacy staff will later need to enter into REDCap. Pharmacy staff will also complete the <u>Outcomes Worksheet</u> within REDCap either online in real time or retrospectively using the <u>paper version</u>. While your pharmacy can use whichever method is best incorporated into your existing workflows, the REDCap system is most efficient when data is collected online in real time.

# **Online Patient Intake Form**

Patients may complete the Patient Intake form online using their personal mobile device, a pharmacy tablet, or pharmacy computer. REDCap is

Patient Intake Form	0.0
Please complete the intake assessment below.	
1) Patient Last Name *must provide value	
2) Patient First Name * men provide rolar	
3) Gender * must provide vilue	State Female Female Feat
4) Date of Birth	Today MOV



designed to make the survey entry user friendly, including mobile responsive formats.

# Mobile Device Set Up

For pharmacies that will have patients complete Patient Intake Form using QR codes or quicklinks. QR codes are read by the camera app on most mobile devices.

*To use a QR code:* Within the Welcome Packet sent by NDSU is a card with a QR code that can be used to have patients scan the code with their mobile device camera or QR reader app. This will redirect them to the Online Patient Intake Form which they can then complete on their mobile device.

To create additional images of the QR code:

REDCap

A Logged in as training | Log out

Project status: Production

Public Survey Link Record Status Dashboard Add / Edit Records

My Projects

Project Home
Project Setup

**Data Collection** 

1. Click on Public Survey Link via the Data Collection section of the Project Tools Menu.

- Figure 9- Public Survey Link
- 2. Right click on QR code to copy or save image, which can then be printed on a pharmacy printer



a reccap.qualityheaithnd.org C
Patient Intake Form
Please complete the intake assessment below.
1) Patient Last Name finus: provide value
2) Patient First Name *most provide value
3) Gender
A must provide value
Male
Female
Other / Unspecified
< > ù m 0





# Pharmacy Tablet Set Up

For pharmacies that will have patients complete Patient Intake Form using a pharmacy provided tablet.

- 1. On your tablet, login to https://redcap.qualityhealthnd.org
- 2. Click on Public Survey Link via the Data Collection section of the Project Tools Menu.



- 3. Click on the Direct Link right below the QR code
- 4. The Patient Intake Form will open in the browser on your tablet
- 5. Add the survey to your home screen (example image is from an iPad using Safari browser)





Contraction

 Exclusion
 Impact Number of Contraction

 Exclusion
 Impact Numerof Number of Contractio

REDCap

6. An icon is created on the tablet home screen allowing for quick access to the Patient Intake Form





# Pharmacy Computer Set Up

For pharmacies that will have patients complete Patient Intake Form using a patient accessible computer, such as computer in a consultation room.

- 1. Using the computer, follow Steps 1-3 in Pharmacy Tablet Set Up
- 2. The Patient Intake Form will open in the browser on your computer
- 3. Bookmark the link for quick access to the Patient Intake Form

# **Online Outcomes Worksheet**

Pharmacies that have patients complete the <u>Online Patient Intake Form</u> can view completed surveys and complete the Outcomes Worksheet in REDCap. REDCap will automatically score the ORT portion of the Patient Intake Form and identify red flags from the opioid overdose portion of the intake form.

- 1. Patient completed the Online Patient Intake Form
- 2. Click on Record Status Dashboard under Data Collection
- 3. The Record Status Dashboard will open. It is a table listing all existing records/responses and their status (completed, incomplete) for both the Patient Intake Form and the Outcomes Worksheet. You may click on any of the colored buttons in the table to view that record in a new tab.
- 4. The Default dashboard displays records in chronological order. Changing the dashboard display to All Intake Forms displays in reverse chronological order (newest first). This may be helpful for pharmacies using Online Patient Intake Form. The New Intake Forms displays only those records without a completed Outcomes Worksheet. In the example that follow, patients



Jane Doe and PT have completed a Patient Intake Form but do not have completed Outcomes Worksheets.



5. Click on the uncolored button under Outcomes Worksheet to open the incomplete Outcomes Worksheet.



6. The Outcomes Worksheet will open. The top portion shows the results from the <u>Online Patient</u> <u>Intake Form</u>. The Opioid Risk Tool (ORT) is automatically scored by REDCap and the risk level is displayed. Immediately below the ORT risk level are listed the accidental risk factors identified by the Patient Intake Form. Below the Patient Intake Form results, the Outcomes Worksheet items needing responses are displayed.

		Course Data
ONE Rx - Opioid and Naloxone Education		Save & Exit Form
Actions: 🔁 Download PDF of instrument(s) ♡	Basic data entry	Cancel
Outcomes Worksheet		
Editing existing Record ID 896-4 Doe, Jane (06-10-1967) (2)		
Record ID	896-4	
Personal and Family History	0 View equation	
Age Score	0 View equation	
Psychological Disease Score	2 View equation	
Total Score ORT Score (automated) and	2 View equation	
Patient Age Displayed	51 View equation	
Louis Dials (0, 2)		
Low Risk (0-3) — ORT risk level aut	tomatically displayed	
Accidental Overdose Risk Assessment		
Medical History		
AA	Accidental Risk Factors identified from	
	Patient Intake Form are displayed here	_
Potential Medications		_
Anxiety Medication		
Outcomes Data		
Risk for accidental overdose		
* must provide value		
○ Yes ○ No ○ Not Screened		reset
Today, patient was identified as at risk for accidental over medications, or age.	dose based on current disease states,	, current
Identified with one or more red flags		
* must provide value		
© Yes ◎ No ◎ Not Screened		reset
Today, patient was identified with one or more red flags o	of opioid use disorder.	
Patient was identified with potential opioid use issues * must provide value		
Ves No PDMP not checked		
Today, patient was identified with potential opioid use issu	use based on PDMP results	reset
Medication take-back program introduced	ues based on PDPP results	
* must provide value		
© Yes ◎ No		
Medication take-back program was introduced to the pati	ent.	reset

Figure 17- Outcomes Worksheet

7. Complete the Outcomes Worksheet responses. When complete, change the Form Status to Complete and Save and Exit Form.

Time v	ith the patient
" must p	ol de la Ce
8	
How I	ing did the pharmacist spend with the patient? (minutes)
Form 5	latus
Compl	ste? Complete *
	Save & Dat Form Save & Stary





8. You will return to the Record Home Page which will indicate completed status for both the Patient Intake Form and the Outcomes Worksheet.

ONE Rx - Opioid and Nalo		
📰 Record Home Page		
The grid below displays the form-by- entered for the currently selected rec the colored status icons to access tha Choose action for record	cord. You may click on	Legend for status icons: (a) Incomplete (c) Incomplete (no data s (c) Unverified (c) Partial Survey Respon (c) Complete (c) Completed Survey Respondence)
Record ID 896-4 successfully edit	red	
Record ID <b>896-4</b> Doe, Jane (0 {2} p1000	06-10-1967)	
Data Collection Instrument	Status	
Patient Intake Form (survey)	۲	
Outcomes Worksheet		

Figure 19 - Completed Record

# Entering Patient Intake & Outcomes Worksheets Completed on Paper

Pharmacies choosing to use paper-based Patient Intake Forms and Outcome Worksheets will need to retrospectively enter results into REDCap. REDCap is designed to mirror the paper forms allowing for user friendly transfer of information from paper to REDCap.

# Paper Survey Collection

- 1. Have patient complete patient intake form available at: <u>https://www.nodakpharmacy.com/onerx/files/PatientIntakeForm.pdf</u>
- 2. Score the patient intake form using the score sheet available here: <u>https://www.nodakpharmacy.com/onerx/files/ORTScoringSheet.pdf</u>
- 3. Complete the Outcomes Worksheet available here: https://www.nodakpharmacy.com/onerx/files/OutcomesWorksheet.pdf

# Entering Paper Results into REDCap

- 1. *Go to Add/Edit Records* under Data Collection
- 2. Select *Add new record* in Add/Edit Records

S Add / Edit Records	
fas may view en existing recontinesponse by action below.	y saleding it from the singl-class lists below. To steads a new recording ports, citch
Teral records 6 / Ingesige 2	
Choose on coluting Record ID	- solid record - P
	Add rank mark to
Outa Search	
Outo Scarch Charose a faileí is search teopáis nutras criste criste	Ai fees •
Choose a field to search	Al feam

Figure 20 - Add new record



3. On the Record Home Page, select the button under Status for the Patient Intake Form

ONE Rx - Opioid and Nalo	oxone Education	
Record Home Page		
Record "896-3" is a new Record	ID. To create the record an	d begin entering data for it, click any gray status icon below
The grid below displays the form-by- entered for the currently selected re- the colored status icons to access the	cord. You may click on	Legend for status icons: incomplete () Incomplete (no data saved) Unverified Oracial Survey Response Complete Oracial Survey Response
NEW Record ID 896-3		
Data Collection Instrument	Status	
Patient Intake Form (wrws)		
Outcomes Worksheet	0	

Figure 21- Record Home Page

4. Complete Patient Intake Form using the responses provided on the paper version.

ONE Rx - Opioid and Naloxone Education

Actions: 🗾 Download PDF of Instrument(s) 🖘 🔹 VID	FO: Basic data entry
🖀 Patient Intake Form	
Adding new Record ID 896-3	
Record ID	896-3
Patient Last Name * mut provide value	
Patient First Name • mat provide value	
Gender • mar provide value	Male     Female     Other / Unspecified     reset
Date of Birth * mor provide value	Today MiDiY
Age	View equation
Has the patient taken opioid medications in the last 60 days	<ul> <li>Yes No</li> <li>Has the patient taken this or other opioid medications in the last 60 days? Examples: Duragesic (fentanyl), Oxycontin (oxycodore), Vicodim (hydrocodore), morphine</li> </ul>
Opioid Misuse Risk Assessment	

Figure 22 - Patient Intake Form

5. When completed with data entry into the Patient Intake Form, click the drop-down box on *Status* and change from Incomplete to Complete. Then click *Save & Go To Next Form*.

Form Status	
Complete?	Incomplete •
	Save & Exit Form Save & Go To Next Form •
	Cancel

Figure 23 - Save & Go To Next Form



 This will open the *Outcomes Worksheet*. The top of the worksheet will contain the ORT score and any YES responses from the Accidental Overdose Risk Assessment portion of the Patient Intake Form. Below are the questions from the Outcomes Worksheet for you to complete your response.

ONE Rx - Opioid and Naloxone Education			
Actions: 📃 Download PDF of instrument(s) 🗠 🌼 VIDEO: Basic	data entry		
Outcomes Worksheet			
Editing existing Record ID 896-3 Fearint, Test (05-15-1982)			
Record ID	896-3		
Personal and Family History	0	View equation	
Age Score	1	View equation	
Psychological Disease Score	1	View equation	
Total Score	8	Yow equation	
Patient Age	36	View equation	
Accidental Overdese Risk Assessment			
Medical History			
History of Depression			
Potential Medications			
Depression Medication Alcohol			
Outcomes Data			
Risk for accidental overdose *rock production Ves  No  Not Screened			
Today, patient was identified as at risk for accidental overdose modiantians, or acc	based on current di	sease states, current	reset

Figure 24 - Outcomes Worksheet

7. When completed with data entry into the Outcomes Worksheet, click the drop-down box on *Status* and change from Incomplete to *Complete*. Then click *Save & Exit Form*.

Form Status	
Complete?	Incomplete •
	Save & Exit Form Save & Stay • - Cancel -

Figure 25 - Save & Exit Form

8. You will be returned to the Record Home Page. If the status for the Patient Intake Form and Outcomes Worksheet are *Complete* (green), you have successfully entered the results.



he grid below displays the form-by-form progress of data ntered for the currently selected record. You may click on re colored status icons to access that form/event.	Legend for status icons: incomplete (incomplete (no data saved) (incomplete (incomplete (incomplete (incomplete))) (incomplete) (incom	
🕼 Choose action for record 🗢		
Record ID 896-3 successfully edited		
Record ID <b>896-3</b> Patient, Test (03-15- 1982) p1000		
Data Collection Instrument Status		
Data Collection Instrument Status		

# Reporting

All ONE Program participants have access to pre-programmed Reports in REDCap and Companion Tool reporting through Microsoft Access. The pre-programmed reports in REDCap will be adequate for most users while those desiring additional measures and functionality will find that in the Companion Tool. REDCap Reports are accessible under the Reports section of the Navigation Menu.

# **REDCap Reports**

The pre-programmed reports in REDCap provide aggregated results on a variety of measures. Clicking on the report will open a table containing all recorded responses.

Data Exports. Reports. and Stats	VIDEO: How to use Data Exports, Reports, and Stats	
Figure 28- Data Table Example		
Number of results returned: 3 Total number of records queried: 9	💼 Stats & Charts 🛛 🖤 Dxport Report 🗌 🎰 Print Page	
Naloxone Prescribed		
Nalescone was prescribed by the pharmecist rx_nalescone		
Not indicated (-1)		
Not indicated (-1)		
No (0)		

### Reports 1) Number of Screenings Completed 2) ORT Score 3) OUD Red Flags Identified Today 4) OUD Explained to Patient 5) PDMP Identified Potential Issues 6) Medication Take-Back Program Discussed 7) Community Support/Treatment Services Discussed with Patient 8) Partial Fill of Opioid 9) Reason for No Partial Fill 10) Naloxone Prescribed 11) Naloxone Dispensed 12) Naloxone Dosage Form 13) Prescriber Contacted 14) Outcome of Prescriber Contact Figure 27 - REDCap Reports

Click on Stats & Charts to create a chart providing a visual display of the





# ONE Rx - Opioid and Naloxone Education Data Exports, Reports, and Stats My Reports & Exports Other Export Options Stats & Charts: Naloxone Prescribed Number of results returned: 4 Total number of records queried: 9 Naloxone Prescribed DISPLAY OPTIONS Optional: Select a record to overlay onto the plots below Viewing options: Show plots & stats Show plots only Show stats only

Naloxone was prescribed by the pharmacist (nc\_naloxone) Refresh Plot | View as Bar Chart V

Total Count (N)	Missing	Unique
3	1 (25.0%)	2

Counts/frequency: Yes (0, 0.0%), No (1, 33.3%), Not indicated (2, 66.7%)





# Companion Tool (Access) Reports

Users desiring additional data features, such as ability to filter by date, may utilize the Companion Tool which utilizes Microsoft Access. Computers that do not have licensed copy of Microsoft Access may utilize the Companion Tool by downloading and installing the free Microsoft Access Runtime Edition.

Installing Microsoft Access Runtime Edition (if Microsoft Access not installed on computer)

In the <u>Navigation Menu</u>, click on Microsoft Access Runtime Edition located in Project Bookmarks.

Follow the directions on the Microsoft website to download and install the Microsoft Access Runtime. You may need to contact your IT department to assist with installation.







# Setting Up the Companion Tool

- 1. In the Project Bookmarks section of Navigation Menu, click on Companion Tool (Access) to download the file to your computer and save to folder for future access.
- 2. Open file
- 3. The Companion Tool will open to the Import menu. You need to complete two fields in the Import menu.
  - a. Username enter your REDCap username
  - API Key the API key is located under Application in the Navigation Menu. Click on API to open the API token for ONE Program. Copy the token (highlight and rick click to



Figure 31 - Companion Tool Import Menu

copy) and paste the token into the Access Companion Tool.

Mdd / Edit Records Show dete collection instruments		ONE Rx - Opioid and Naloxone Education
Applications Dece Deports, Reports, and States File Repusitory API (Solomaria) Project Bookmarks	E	# API The REDCap API is an interface that allows external applications to connect to REDCap remotely, and is used for programmatically retraining on modifying data or settings within REDCap, such as performing automated data importal/opports from a specified REDCap project. For details on the capabilities of the REDCap API and how to use it, please see the <u>REDCap API documentation</u> .
<ul> <li>Measure Descriptions (Excel)</li> <li>Companion Tool (Access)</li> <li>Microsoft Access Runome Edition</li> <li>ONE Rx Project Website</li> </ul>		API Security: Best Prectices It is important to remember that when making requests to the REDCep API, you should always validate the REDCep server's SSL certificate to ensure the Represe level of security during communication with the API. For details on what this means and how to de it, we the XPI Security: Best Precises' section in the <u>REDCep API classementation</u> .
Insperts In Number of Sciencings Completed In OUT Score In OUT Score In OUT Score In OUT Science In Science Index In Out Steam Index Index In Out Steam Index Index In Out Steam Index Index In Out Science Index Index In Index Index Index Index Index In Index		Your API taken for project "ONE Rx - Opioid and Nakosone Education"         The API taken for project "ONE Rx - Opioid and Nakosone Education"         PLCap data and should NOT be showed with where, if you take take of place mean place taken drows special access to PLCap advector access reserved advector back or approximate place taken of ta
External Meduks	Ξ	

Figure 32 - API Token

- 4. Once Username and API key have been entered into Companion Tool, click Update Data (see figure 31)
- 5. You will see a Return Code populated in the Import Menu. You data has been updated in Access.

# Using the Companion Tool

Once the Companion Tool has been <u>set up</u>, it can be used to review additional measures. The measures are defined in <u>Measure Descriptions</u> (Excel) located under Project Bookmarks in the Navigation Menu.

- 1. Open the Companion Tool
- 2. Under the Import Menu, click Update Data to download the current REDCap data
- 3. Total ORT Scored report lists all patients entered into system and their ORT scores
- 4. Performance by Time Period allows users to view each of the measures in the Measure Descriptions (Excel). Date ranges can be modified by changing the start and end date.