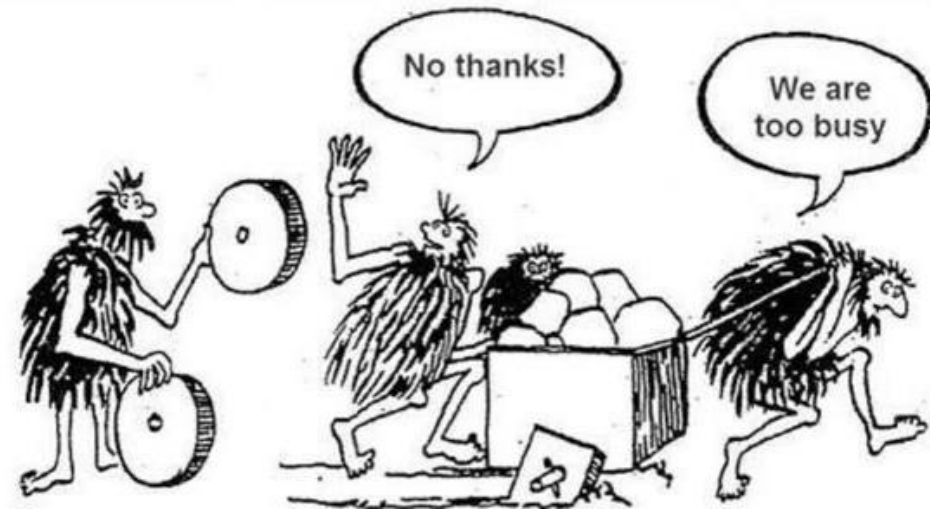


SO HAPPY TOGETHER: INTEGRATING SERVICE DELIVERY AND DATA COLLECTION WITH ELECTRONIC CASE RECORDS



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Eastern Evaluation Research Society
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Caring for Generations
JF&CS
Jewish Family & Children's Service

Session Agenda

- ① **What are ECRs?**
- ② **How to transition to ECRs?**
- ③ **What are benefits of ECRs as an evaluation tool?**
- ④ **How are we using data from ECRs?**

What is an Electronic Case Record?

**Electronic
Case
Records
(ECRs)**



CERS: Our Case Study

Center for Early Relationship Support

- A Division at JF&CS Containing 11 distinct programs
- Their programs support healthy bonding between parents and children during the first year of life through support groups, clinical services, mentoring, and concrete needs services.
- In FY16 CERS served approximately 1,300 parents and their children
- CERS has served the greater Boston area for over 20 years.
- In May 2015 we began the process of moving them from paper to electronic case record

Challenges with CERS Data Quality: Why Use ECRs?

Foundational Internal Evaluation Questions

① Who are you serving?

② How are you serving them?

High-Quality Data:

Complete

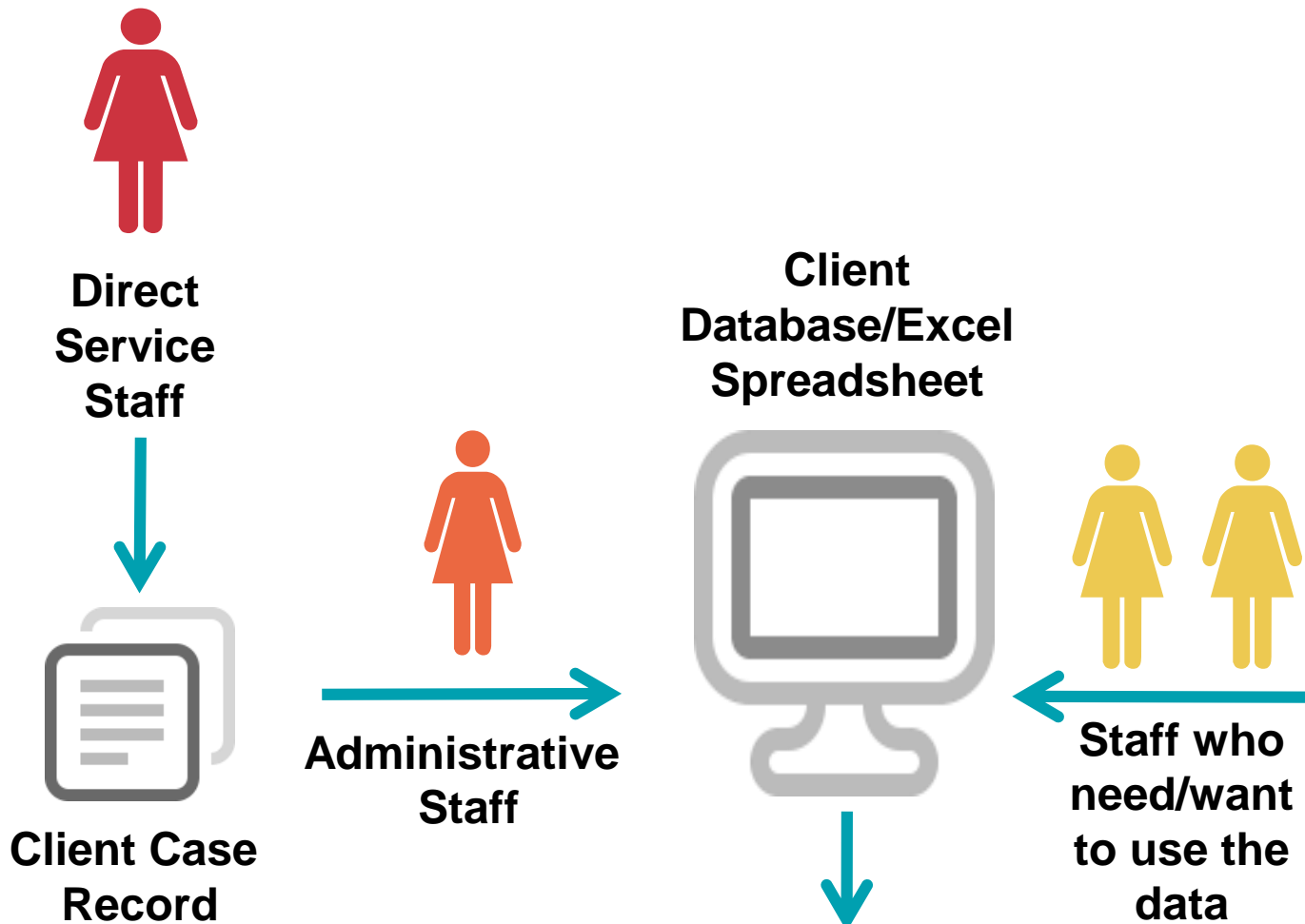
Uniform

Accurate

Timely

CERS Data Before ECRs:

Data Collection for Evaluation and Service Provision are Separate



Complete



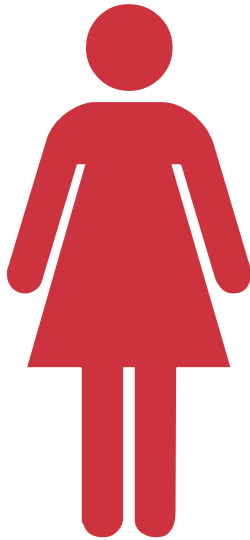
Uniform



Accurate



Timely



Direct Service Staff



Client Case Record

- Client contact information
- Emergency contact information
- Notice of Privacy Practices
- Relevant consent forms
- Disclosure logs
- Demographic information
- Financial information
- Medical information
- Psychological assessments
- Dates of services
- Assessment of client needs
- Client service plan
- Progress notes
- Evidence of quarterly case supervision
- Consultation notes
- Records from other service providers
- Termination summary



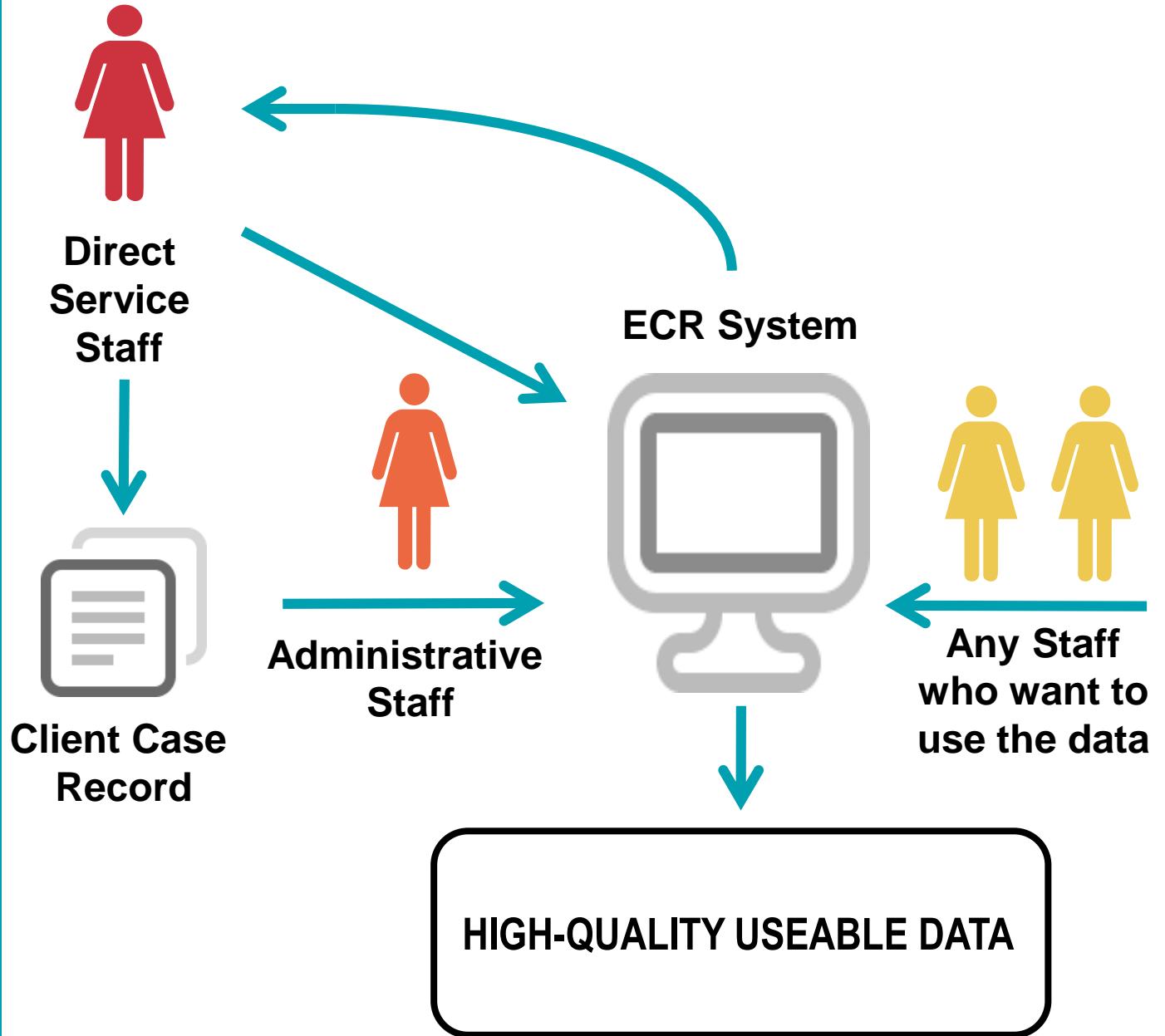
Direct Service Staff



Client Case Record

- Client contact information
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**CERS
Data After
ECRs:
Data
Collection for
Service
Provision and
Data
Collection are
Integrated**



The ECR Conversion Process

Site Building

Sept-Oct 2015

**Feedback/
Revision**

Nov-Dec 2015

Discovery

Jul-Aug 2015

Training

Jan 2016

**Data
Migration**

Jan 2016

Launch

Feb 1, 2016

Scoping

May 2015

On Going Support

Feb-June 2016



Benefits of ECRs for CERS and DEL

Evaluation

- **Easily accessible, *high-quality* data that can be used!**

Operations/Direct Service

- **Increased capacity to learn from their data**
- **Increased ability to monitor service delivery**
- **Increased ability to monitor compliance**

How do We Use ECRs and What Lessons Have We Learned about Building Them?

Monitoring Data Quality: Demographics

Demographic Completeness Report

Fragile Beginnings

Demographic Completion Report for Clients Served, 1/1/17 to 3/11/17

Program Enrollment

Clients Active in Program during this Date Range: 38

Clients Added to Program in Date Range: 15

Clients Dismissed from Program in Date Range: 7

Client Census (clients active in program today): 31

Light-Touch People* Served in Date Range: 2

Active Clients List

Name	Gender Identity	Race-Ethnicity	DOB	Primary Language	Religion	Employment Status at Entry	Household Size	Household Income Level (annual)	Education
Fake, Maria	Female		12/2/80	Spanish	Catholic	Unemployed	4	\$10,000 - \$24,999 per year	Bachelors Degree
Fake, Pat	Female	White - Cauca	12/18/79	English	No Religious	Full-Time	4	\$50,000 - \$74,999 per year	Bachelors Degree
Fake, Gail	Female	Black or Africa	10/10/85	Creole	No Religious	Full-Time	6	\$25,000 - \$49,999 per year	Some College
Fake, Kris	Female	White - Cauca	4/19/76	English	Catholic	Unemployed	3	\$100,000+ per year	Bachelors Degree
Fake, Cheri	Female	White - Cauca	5/11/84	English	Catholic	Full-Time	3	\$50,000 - \$74,999 per year	Bachelors Degree
Fake, Kim	Female	White - Cauca	1/14/71	English	Catholic	Full-Time	4	\$25,000 - \$49,999 per year	Bachelors Degree

Monitoring Data Quality: Demographics

Demographic Completeness Report Continued

Demographics Breakdown of Active Clients in Date Rang

For all tables below N= 38

Gender Identity	# of Clients	% of Clients
Female	37	97%
Male	1	3%

Age Ranges	# of Clients	% of Clients
31-40	22	58%
21-30	13	34%
41-50	3	8%

Employment	# of Clients	% of Clients
Unemployed	18	47%
Full-Time	14	37%
Missing Data	3	8%
Part-Time	3	8%

Household Income (annual)	# of Clients	% of Clients
\$100,000+ per year	10	26%
\$0 - \$9,999 per year	8	21%
\$25,000 - \$49,999 per year	6	16%
\$10,000 - \$24,999 per year	4	11%
\$50,000 - \$74,999 per year	4	11%
\$75,000 - \$99,999 per year	3	8%
Client did not respond	3	8%

Race-Ethnicity	# of Clients	% of Clients
White - Caucasian (not of Hispanic Origin)	18	47%
Black or African American (not of Hispanic Origin)	8	21%
Hispanic or Latino	5	13%
Other	3	8%
Asian	2	5%
Missing Data	1	3%
Multiracial	1	3%

Primary Language	# of Clients	% of Clients
English	30	79%
Spanish	5	13%
Other	2	5%
Creole	1	3%

Household Size	# of Clients	% of Clients
3	15	39%
4	10	26%
5	4	11%
6	4	11%
2	3	8%
8+	1	3%
Client did not respond	1	3%

Monitoring Data Quality: Services

New Client Monitoring Report

VM Supervisor (All values) ▾


Visiting Mom (All values) ▾

List of Clients Served by Program
From 1/1/17 to 3/11/17

Clients Added to Program in Date Range

First Name	Last Name	Infant(s) DOB	Program Start Date	Weeks In Program	Date of Priv Practice	Date of Service Agreement	Date of Edinburgh Pre-Assessment	VM Supervisor	Visiting Mom
Corina	Fake	11/1/16	2/17/17	3	2/17/17	2/17/17	2/17/17	Laura Gerson	Debby Gelber
Jan	Fake	9/30/16	2/28/17	2			2/28/17	Michelle Acker	
Manuela	Fake		1/23/17	7	1/23/17	1/23/17	1/23/17	Diane Gardner	
Yurigo	Fake	11/24/16	1/3/17	10					
Svetlana	Fake	9/26/16	1/10/17	9	1/10/17	1/10/17	1/10/17	Tracy Rich	Tracy Rich
Mary	Fake	8/12/13	2/17/17	3			2/17/17	Tracy Rich	Jacqueline Caceres
Maude	Fake	7/29/16	2/15/17	3			2/15/17	Tracy Rich	Jacqueline Caceres
Mabel	Fake	2/21/17	2/2/17	5	3/3/17	2/2/17	2/2/17	Diane Gardner	Linda Klickstein
Liz	Fake	1/23/17	2/13/17	4	2/15/17	2/15/17	2/13/17	Terri Chebot	Sybil Nickerson Carey

Monitoring Data Quality: Services

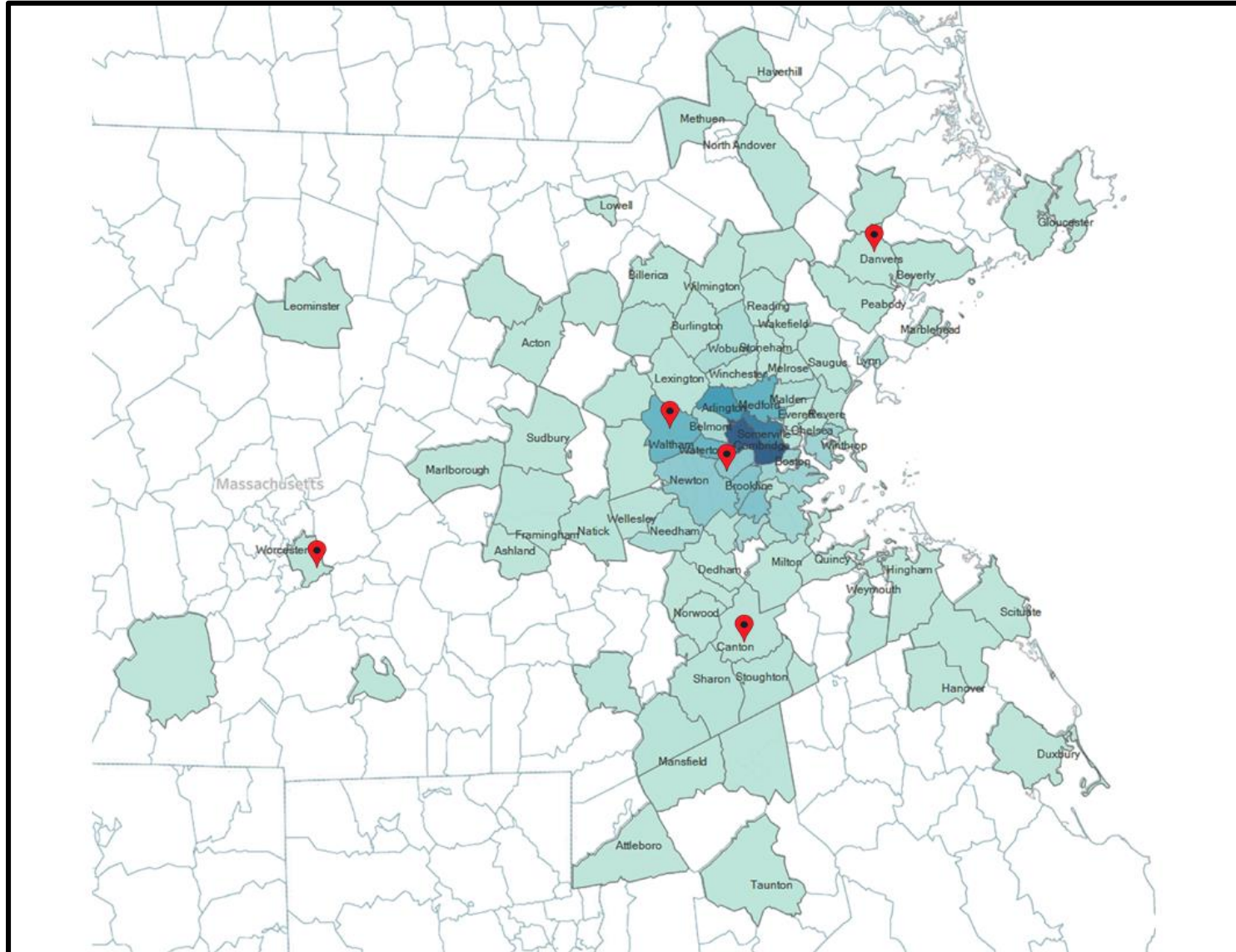

VM Supervisor (All values) ▾
Visiting Mom (All values) ▾

Clients Served by Program in Date Range

First Name	Last Name	Start Date	Infant(s) DOB	Weeks In Program	Total # of VM Visits	Date of Utilization Review	Date of Most Recent VM Client Visit	Date of Most Recent Non-Visit* TouchPoint	Type of Most Recent Non-Visit* TouchPoint	Visiting Mom	VM Supervisor
Candi	Fake	2/17/17	11/1/16	3	1		2/23/17	2/28/17	Visiting Moms Supervision Note	Debby Gelber	Laura Gerson
Camille	Fake	12/13/16	12/1/16	13	0			2/23/17	Visiting Moms Outreach Contact	Tracy Rich	Tracy Rich
Rhonda	Fake	12/28/16	8/28/16	11	2		1/17/17	1/16/17	Visiting Moms Outreach Contact	Rosemary Ryan	Tracy Rich
Aricelli	Fake	5/19/16	4/14/16	42	35	6/30/16	2/7/17	3/2/17	Visiting Moms Supervision Note	Barbara Wolberg	Debbie Whitehill
Indira	Fake	10/20/16	10/10/16	20	9	2/6/17	2/8/17	2/27/17	Visiting Moms Supervision Note	Shelly Buchsbaum	Diane Gardner
Aliyah	Fake	9/12/16	7/10/16	26	19	11/9/16	2/28/17	3/1/17	Visiting Moms Supervision Note	Lorrie Owades	Terri Chebot
Samina	Fake	7/19/16	6/13/16	34	26	9/1/16	2/14/17	3/1/17	Visiting Moms Supervision Note	Naomi Rosenfeld	Karen Lawee
Sadie	Fake	6/9/16	5/26/16	39	29	7/6/16	2/9/17	2/16/17	Visiting Moms Supervision Note	Angela Gordon	Debbie Whitehill
Selah	Fake	2/28/17	9/30/16	2	0			2/28/17	Visiting Moms Intake Assessment		Michelle Acker

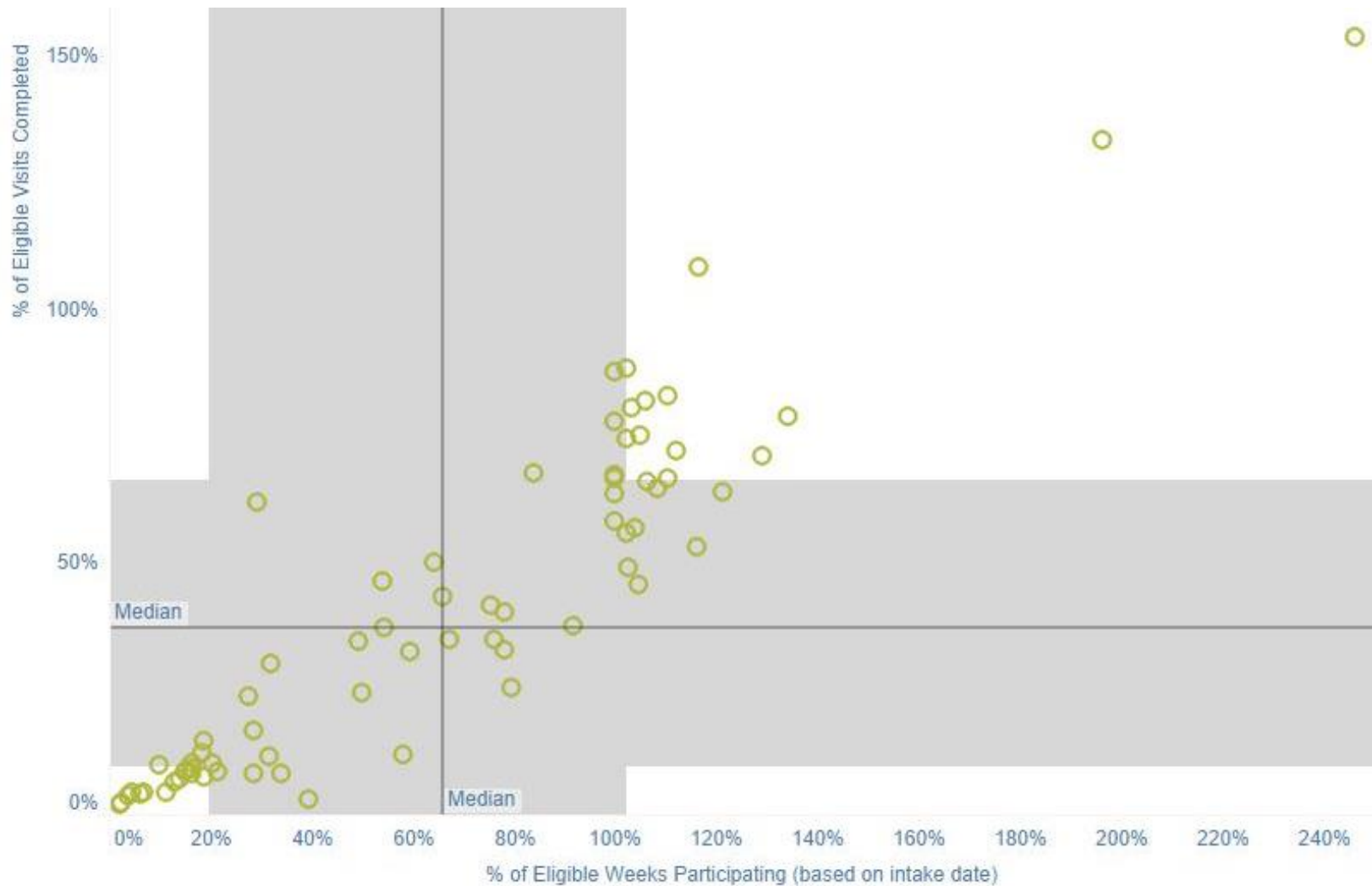
Outputs – Where are our clients?

Heat Map of Clients Served by CERS in FY16



Outputs – Program Model Fidelity

Weeks in Program vs Number of Visits



Take Aways

Internal Evaluators – ECRs can foster efficient data collection and substantive conversations about practice.

Consultants – ECRs are an indicator of readiness for meaningful evaluation.

Academic Researchers – Think of ECRs as an asset.

Questions

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