

Chapter 4

Instructions for using the OAT Monitoring System

Slide 1



The slide content is enclosed in a black rectangular border. At the top center, the letters "OMS" are displayed in a large, bold, blue font with a red outline. Below this, a thick green horizontal bar is followed by a yellow horizontal bar containing the text "The Opioid Agonist Therapy Monitoring System" in a black serif font. In the bottom left corner, there is a small photograph of a field of red poppies under a cloudy sky. In the bottom right corner, the logo for the Opiate Initiative is shown, featuring a blue circle with a white "O" inside, followed by the words "PIATE Initiative" in a black serif font.

This chapter is a paper copy of the OMS PowerPoint tutorial. You may use this version as a companion to the PowerPoint presentation, or independently.

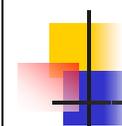
Slide 2



Introduction

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Slide 3



PowerPoint Tutorial

- This PowerPoint tutorial is designed as a guide to help you become familiar with the *Case Management Log* Excel Spreadsheet
- After walking through this PowerPoint tutorial, you should be able to enter data into the Excel *Case Management Log*, create graphs, and print graphs specific to the numbers you enter

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Slide 4

PowerPoint Tutorial

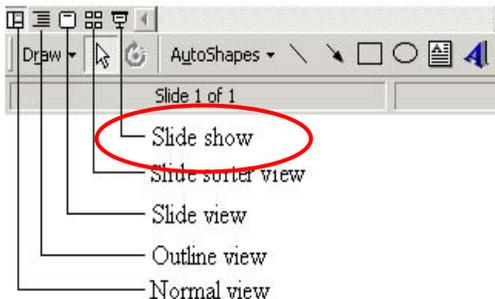
- The first part of this tutorial is designed to give you basic knowledge of Excel
- If you are unfamiliar with Excel, take the time to read through these slides
- If you are already familiar with Excel, please skip to slide 26 where information about the Excel *Case Management Log* begins

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Slide 5

PowerPoint Tutorial

- Be sure to view this presentation using the *Slide Show* option
- Find the *Slide Show* button near the bottom of your screen and left click



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Slide 6



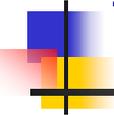
PowerPoint Tutorial

- While in the *Slide Show* view, use the Page Up and Page Down keys to flip through the slides



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Training for the Excel Spreadsheet

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Slide 8

Excel Worksheet

This is the general layout of an Excel worksheet

The screenshot shows the Microsoft Excel interface. At the top is the menu bar with options: File, Edit, View, Insert, Format, Tools, Data, Window, Help. Below the menu bar is the toolbar with various icons for file operations and editing. The main area is the worksheet grid, with columns labeled A through H and rows numbered 1 through 10. The active cell is A1. At the bottom, there are sheet tabs labeled Sheet1, Sheet2, and Sheet3. A blue oval labeled 'Worksheet area' encompasses the grid. Three arrows labeled 'Sheet tabs' point to the tabs at the bottom.

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Slide 9

Columns, Rows, and Cells

- Every spreadsheet has columns, rows, and cells
- In this picture, the active cell, B7, is the cell outlined with the dark border
- When a cell is active, a number can be entered into that cell

The diagram shows a portion of an Excel grid with columns A, B, C, and D, and rows 1 through 16. Red arrows point to the column headers (A, B, C, D) with the label 'Columns'. Another set of red arrows points to the row numbers (1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16) with the label 'Rows'. A third set of red arrows points to the active cell B7, which is outlined with a dark border, with the label 'Cells'.

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Slide 10

Referencing Cells

	A	B	C	D	E
1					
2		B2	C2	D2	E2
3					E3
4	A4	B4			
5				D5	
6		B6			

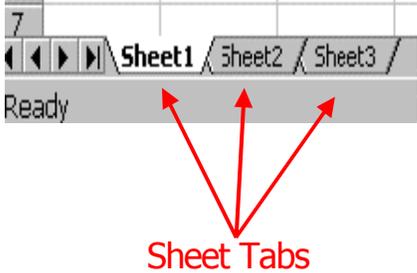
- When referencing cells, the column letter is named first and the row number is named second

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Slide 11

Sheet Tabs

- Each sheet tab represents a different sheet in the workbook
- In this example, *Sheet 1* is highlighted because it is currently active



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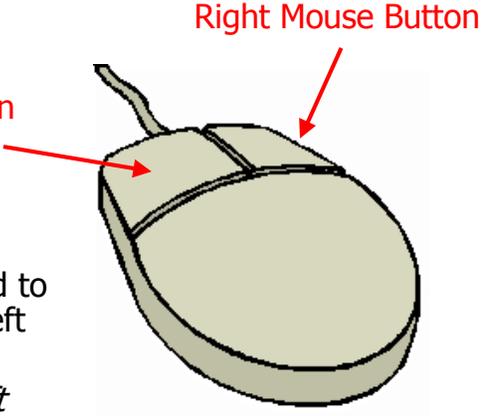
Slide 12

Moving Around the Spreadsheet

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Slide 13

Using the Mouse



Left Mouse Button

Right Mouse Button

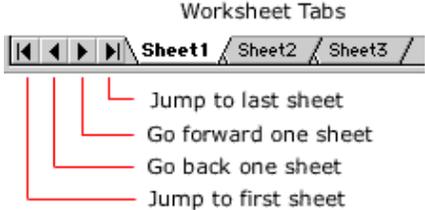
- The main button used to move around is the left mouse button
- Use this button to *left click*

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Slide 14

Using Sheet Arrows

Workbook Navigation



The screenshot shows three worksheet tabs: Sheet1, Sheet2, and Sheet3. Below the tabs are four navigation arrows: a double left arrow, a single left arrow, a single right arrow, and a double right arrow. Red lines connect these arrows to a legend:

- Jump to last sheet
- Go forward one sheet
- Go back one sheet
- Jump to first sheet

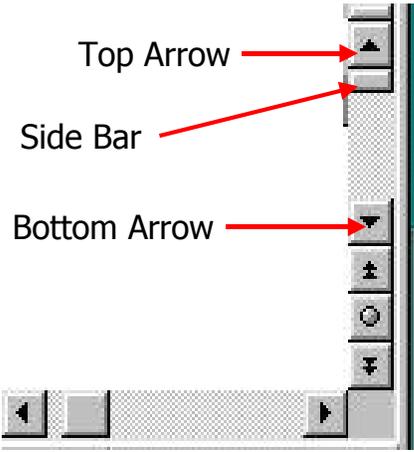
- Another way to move around is to left click on the arrow buttons at the bottom of your screen
- As shown in the picture, they can be used to move among worksheets
- Not all of the tabs can be displayed on the screen at once. If the last tab you see is *Couns7* (counselor 7), click on the black arrow that will move you forward one sheet and the *Couns8* (counselor 8) tab will come into view

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Using Scroll Bars

- There are scroll bars on both the right side and bottom of your screen
- Right click on the top or bottom arrows if you want to move up or down
- To move rapidly down cells (e.g., from row 1 to 1235), click on the side bar and drag it down to cell 1235
- Excel will display a box indicating the rows you are passing so you know where to stop
- When you are at the row you want, release the mouse button



The screenshot shows the scroll bars at the bottom right of the Excel window. Red arrows point to the 'Top Arrow', 'Side Bar', and 'Bottom Arrow'.

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Slide 16

Using the Arrow Keypad



- The arrow keypad located next to the number pad on the left side of your keyboard will move you up, down, left, or right on the spreadsheet

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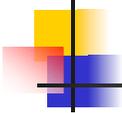
Slide 17

Using Freeze Panes

- Many spreadsheets, including the *Case Management Log*, are set up with column and row headings
- But, as you start to move around a large spreadsheet, you can easily get thrown off course when your headings scroll out of view
- When you are in the middle of the spreadsheet and the headings are not in view, it is hard to know if you are entering the correct information into the correct row or column
- In this situation, using an option called *Freeze Panes* is a great way to move around the spreadsheet and still have the row and column headings in view

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Slide 18



Using Freeze Panes

- The Freeze Panes feature is very useful because it allows you to see the column and row headings on the Excel Spreadsheet no matter where you move—the headings do not disappear!
- The frozen column and row headings remain visible as you move through the rest of the worksheet

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Using Freeze Panes

- In order to freeze both the column and row headings, left click in a cell below the row that you want to freeze and to the right of the column you want to freeze
- Then go to the WINDOW Menu and left click on *Freeze Panes*
- See example on next slide

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Slide 20

Using Freeze Panes

The screenshot shows the 'Window' menu with 'Freeze Panes' highlighted. The spreadsheet below shows a table with columns for patient information and current dose. The first row of data (row 6) is highlighted in yellow, and the second row (row 7) is highlighted in blue. The 'Freeze Panes' option is circled in red in the 'Window' menu.

COUNSELOR 1						
review patient status	patient name	last 4 digits of social security number	patient's most RECENT date of clinic entry	current methadone dose (mg)	current LAAM stable dose (e.g., 80)	current dose (e.g., 80)
	John Smith	9858	7/30/1991		80	
	Kenneth Simon	6523	1/13/1999	75		
	George Johnson	5842	4/30/1999	80		
	Jeffrey Adams	1524	5/16/2003	50		
	Steven Bachman	5267	11/15/2002	70		
	Raymond Williams	3528	1/4/2003	60		
	Mel Douglas	6254	1/4/2003	55		
	Carl McAndrews	8601	4/29/2003	60		

Slide 21

Using Freeze Panes

- Freezing both the ROW and the COLUMN will look like this
- Lines appear to indicate the frozen panes
- Cell D11 is the first cell that is not frozen

The screenshot shows the spreadsheet with the first row and column frozen. The 'Freeze Panes' option is no longer visible in the menu. The spreadsheet shows a table with columns for patient information and current dose. The first row of data (row 6) is highlighted in yellow, and the second row (row 7) is highlighted in blue. The 'Freeze Panes' option is circled in red in the 'Window' menu.

COUNSELOR 1						
review patient status	patient name	last 4 digits of social security number	patient's most RECENT date of clinic entry	current methadone dose (mg)	current LAAM stable dose (e.g., 80)	current dose (e.g., 80)
	John Smith	9858	7/30/1991		80	80/8
	Kenneth Simon	6523	1/13/1999	75		
	George Johnson	5842	4/30/1999	80		
	Jeffrey Adams	1524	3/1/2002	50		
	Steven Bachman	5267	11/15/2002	70		
	Raymond Williams	3528	1/4/2003	60		
	Mel Douglas	6254	1/4/2003	55		
	Carl McAndrews	8601	4/29/2003	60		

Slide 22

Using Freeze Panes

- Rows 1-10 and Columns A-C will stay frozen as you move throughout the spreadsheet
- Notice Rows 10 & 24 and Columns C & I are right next to each other

The screenshot shows an Excel spreadsheet titled "Microsoft Excel - OpiATE Initiative Case Management Log". The spreadsheet has columns A through J and rows 1 through 24. Rows 1-10 and columns A-C are highlighted in light blue, indicating they are frozen. Red circles highlight row 10, row 24, column C, and column I. The data in the spreadsheet is as follows:

row	col A	col B	col C	col D	col E	col F	col G	col H	col I	col J
1			Begin Date:							
2			End Date:							
3										
4										
5			COUNSELOR 1						TREATMENT PLAN	
6	review	patient	current # of	# counsel.						
7	status	name	take-homes/wk	visits in						
8			(methadone pts only)	current month						
9		John Smith		2						
10		Kenneth Simon	3	2						
24		Raymond Williams	1	2						

Slide 23

Using Freeze Panes

- To unfreeze panes, go to the WINDOW Menu and click on *Unfreeze Panes*

The screenshot shows the same Excel spreadsheet as Slide 22, but with the 'Window' menu open. The 'Unfreeze Panes' option is highlighted with a red circle. The spreadsheet data is partially visible below the menu:

row	col A	col B	col C	col D	col E	col F	col G	col H	col I	col J
			CURRENT DOSE						TREATM	
			Current LAAM	Current LAAM	Current # of					
			Stable Dose	Dose	take-homes/wk					
			(e.g., 80)	(e.g., 80/80/100)	(Methadone Patients Only)					
		mith	87	80/80/100						
		Simon			4					
			50	80/80/100						
			70	80/80/100						

Slide 24

Using Freeze Panes

- The next slide has an animated example of the Freeze Panes option
- Make sure you are viewing this presentation using the *Slide Show* option (see slide 5 for details)

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Slide 25

Using Freeze Panes (example)

Order	Customer	Total	Order Date
10643	Alfreds Futterkiste	\$29.46	25-Aug-1997
10308	Ana Trujillo Empared	\$1.61	18-Sep-1996
10856	Antonio Moreno Tac	\$58.43	28-Jan-1998
1016	Around the Horn	\$33.80	10-Apr-1998
10278	Berglunds snabbköp	\$92.69	12-Aug-1996
11058	Blauer See Delikates	\$31.14	29-Apr-1998
10826	Blondel père et fils	\$7.09	12-Jan-1998

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Slide 26



Case Management Log

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Slide 27



Case Management Log

- Now that the basics of Excel have been covered...
- Let's look at the *Case Management Log*

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Slide 28

Getting Started

- In order to open the *Case Management Log* Excel file, insert the OMS CD into your CD drive. Then double click on the Excel icon that looks like this.



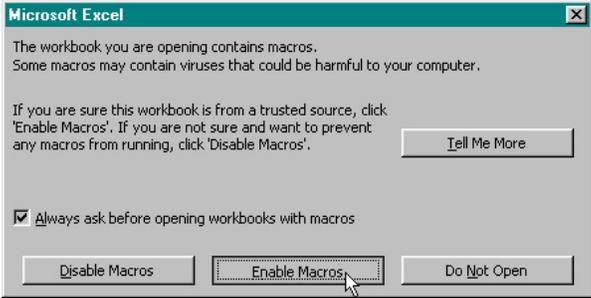
OpiATE Initiative Case Management Log

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Slide 29

Getting Started

- Before the spreadsheet opens, a box like this will pop up
- Click on the box that says *Enable Macros*



Microsoft Excel

The workbook you are opening contains macros. Some macros may contain viruses that could be harmful to your computer.

If you are sure this workbook is from a trusted source, click 'Enable Macros'. If you are not sure and want to prevent any macros from running, click 'Disable Macros'.

Always ask before opening workbooks with macros

Disable Macros Enable Macros Do Not Open

Tell Me More

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Slide 30

Case Management Log

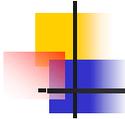
This is an example of the spreadsheet that will open

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Spreadsheet Dynamics

- The Case Management Log has enough rows to hold data for 12 different counselors
- Each counselor has enough space to enter data for 100 patients

Slide 32



Getting Started

- In the *Case Management Log*, there are 17 sheet tabs at the bottom of the page
- The first tab is labeled *Case Management Log*. This is where all data will be entered and all counselor and clinic totals will be tabulated.
- The next tab is labeled *AOS*. This is where *Abstinence Orientation Scale (AOS)* scores are entered.
- Twelve other tabs are labeled *Couns1*, *Couns2*, etc. This is where individual counselor charts will be created.
- Another tab is labeled *Counselors + Clinic*. This is where you find charts showing data for the entire clinic.
- The tab labeled *counselor logs* contains logs that can be printed.
- The last tab labeled *chart reference cells* contains formulas and chart set ups. This part of the log is automated so you won't have to enter data into this worksheet.

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Slide 33



Data Entry

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Slide 34

Case Manager Information

- We encourage you (case managers) to complete the *Case Management Log* as you see patients
- You will benefit most from this information if you refer to the form and update it at each patient's visit
- If you wait until the end of the month to complete the Log, you may have to go back and refer to patient charts that are not immediately on hand

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Data Entry

- Data can be entered using either the number row on the keyboard or by using the number pad



Number Row

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Slide 36

Data Entry

- If you use the number pad, make sure the Num Lock key is active
- If it is not pressed, only the arrow pad within the numeric keypad will work



The diagram shows a standard numeric keypad. A red arrow points to the 'Num Lock' key in the top-left corner. A vertical line with the text 'Numeric Keypad' above it points to the entire keypad area. The keypad includes keys for numbers 0-9, a decimal point, a slash, asterisk, equals, and minus key, and arrow keys.

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Data Entry

- Each counselor has a specific area to enter data
- All graphs and formulas for each counselor are mapped to specific rows and columns in the spreadsheet
- Look for individual counselor headings to make sure you are entering data in the correct area (see next slide for examples)

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Data Entry for Counselor 3

Microsoft Excel - OpiATE Initiative Case Management Log

File Edit View Insert Format Tools Data Window Help

H249

Begin Date: 7/1/2003 End Date: 7/31/2003					
COUNSELOR 3		PATIENT INFORMATION			
review status	patient name	last 4 digits of social security number	patient's most RECENT date of clinic entry	current methadone dose (mg)	
	John Smith	9858	7/30/1991		
	Kenneth Simon	6523	1/13/1999	75	
	George Johnson	5842	4/30/1999	80	
D	Jeffrey Adams				
	Steven Bachman				

For example, Counselor 3 would enter data in rows 237 through 336 under the Counselor 3 heading

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Data Entry for Counselor 7

Microsoft Excel - OpiATE Initiative Case Management Log

File Edit View Insert Format Tools Data Window Help

H702

Begin Date: 7/1/2003 End Date: 7/31/2003					
COUNSELOR 7		PATIENT INFORMATION			CURREN
review status	patient name	last 4 digits of social security number	patient's most RECENT date of clinic entry	current methadone dose (mg)	currer stabl (e.g
	Steven Bachman	5267	11/15/2002	70	
	Raymond Williams	3526	1/4/2003	60	
	Carl McAndrews	8501	4/29/2003	60	
C	Charles Johnson				
	Steven Bachman				
	Raymond Williams				
	Mel Douglas				

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Case Management Log Items

- There are 15 items for each patient
- The following slides are examples of data entry for Counselor 1's patients in columns A-O



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Slide 41



Data Entry

- For all *Case Management Log* items, make sure you enter a zero into a cell rather than leave the cell blank
- For example, if a patient has not had any counseling visits, enter a 0
- If the cell is left blank, that patient's zero values will not be averaged into the counselor and clinic totals

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Begin Date & End Date

- Don't forget to enter the Begin Date and End Date at the top of the spreadsheet in order to keep track of monthly data
- This date will tell you which period of time to refer to when entering your patient's data

Begin Date: 7/1/2003 End Date: 7/31/2003			
COUNSELOR 1		PATIENT	
review	patient	name	last 4 digits of social security number
status			
		John Smith	9858
		Kenneth Simon	6523
		George Johnson	5842
	C	Jeffrey Adams	1524
		Steven Bachman	5267

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Review Patient Status

- Located in column A
- If a patient has been at a clinic for less than a month AND has tested positive for opioids or tested positive for non opioids, the letter *C* will appear in column A. This indicates that weekly counseling is suggested.

Begin Date: 7/1/2003 End Date: 7/31/2003			
COUNSELOR 1		PATIENT	
review	patient	name	last 4 digits of social security number
status			
		John Smith	9858
		Kenneth Simon	6523
		George Johnson	5842
	C	Jeffrey Adams	1524
		Steven Bachman	5267

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Review Patient Status

Microsoft Excel - OpiATE Initiative Case Management Log			
C12 Jeffrey Adams			
A	B	C	D
1			
2		Begin Date: 7/1/2003	
3		End Date: 7/31/2003	
4			
5		COUNSELOR 1	
6			PATIE
7	review patient status	patient name	last 4 digits social secur number
8	patient status	patient name	social secur number
9		John Smith	9858
10		Kenneth Simon	6523
11		George Johnson	5842
12	C D	Jeffrey Adams	1524
13		Steven Bachman	5267

- Located in column B
- If a patient's dose level is less than 60 mg of methadone or methadone equivalent, and that patient has tested positive for opioids, the letter *D* will appear in column B. This indicates that a dose review is suggested.

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Patient Name

- Located in column C
- You can use either a patient name or a patient number in this column

End Date: 7/31/2003					
CASE MAN					
COUNSELOR 1			PATIENT INFORMATION		
review patient status	patient name	last 4 digits of social security number	patient's most RECENT date of clinic entry	curre method dose (
patient status	patient name	social security number	date of clinic entry	dose (
	John Smith	9858	7/30/1991		
	Kenneth Simon	6523	1/13/1999	75	
	George Johnson	5842	4/30/1999	RN	

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Social Security Number

- Located in column D
- Enter only the last 4 digits of patient's social security number

3	<i>End Date: 7/31/2003</i>				
4					
5	COUNSELOR 1		PATIENT INFORMATION		
6	review	patient	last 4 digits of social security number	patient's most	curre
7	patient	name		RECENT date	methad
8	status			of clinic entry	dose (
9		John Smith		9858	7/30/1991
10		Kenneth Simon	6523	1/13/1999	75
		George Johnson	5842	4/30/1999	80

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Clinic Entry Date

- Located in column E
- Enter patient's most RECENT date of clinic entry
- Enter the month, day, and year (e.g., 8/12/2002)

3	<i>End Date: 7/31/2003</i>				
4					
5	COUNSELOR 1		PATIENT INFORMATION		
6	review	patient	last 4 digits of social security number	patient's most	curre
7	patient	name		RECENT date	methad
8	status			of clinic entry	dose (
9		John Smith		9858	7/30/1991
10		Kenneth Simon	6523	1/13/1999	75
		George Johnson	5842	4/30/1999	80

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Current Methadone Dose (mg)

- Located in column F
- If the patient is on methadone, leave the LAAM dose columns empty

2	DOSE MANAGEMENT LOG			
3				
4				
5	<i>CURRENT DOSE</i>			
6	current methadone dose (mg)	current LAAM stable dose (e.g., 80)	current LAAM dose (e.g., 80/80/100)	cu take (metha
7		80	80/80/100	
8	75			
9	80			
10	50			
11				
12				

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Current LAAM Stable Dose

- Located in column G
- Enter only the stable dose for this column
- If the patient is on LAAM, leave the methadone dose column and the current number of take-homes column empty

2	DOSE MANAGEMENT LOG			
3				
4				
5	<i>CURRENT DOSE</i>			
6	current methadone dose (mg)	current LAAM stable dose (e.g., 80)	current LAAM dose (e.g., 80/80/100)	cu take (metha
7		80	80/80/100	
8	75			
9	80			
10	50			
11				
12				

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Current LAAM Dose

- Located in column H
- Enter the entire LAAM Dose
- Remember to enter data in both LAAM columns

2	DOSE MANAGEMENT LOG			
3				
4				
5	CURRENT DOSE			
6	current methadone dose (mg)	current LAAM stable dose (e.g., 80)	current LAAM dose (e.g., 80/80/100)	cu
7				take
8				(metha
9		80	80/80/100	
10	75			
11	80			
12	50			

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Current # of Take-home Doses

- Located in column I
- This column is for methadone patients only
- Leave this cell blank for LAAM patients

2			
3			
4			
5	TREATMENT PLAN		
6	current # of take-homes/week (methadone pts only)	# counsel. visits in current month	# utox screens in current month
7			
8			
9		2	1
10	3	2	1
11	3	2	1

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Number of Counseling Visits

- Located in column J
- Enter the number of visits for the current month

2			
3			
4			
5	<i>TREATMENT PLAN</i>		
6	current # of	# counsel.	# utox
7	take-homes/wk	visits in	screens in
8	(methadone pts only)	current month	current month
9		2	1
10	3	2	1
11	3	2	1

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Number of Utox Screens

- Located in column K
- Enter the number of utox screens for the current month

2			
3			
4			
5	<i>TREATMENT PLAN</i>		
6	current # of	# counsel.	# utox
7	take-homes/wk	visits in	screens in
8	(methadone pts only)	current month	current month
9		2	1
10	3	2	1
11	3	2	1

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Positive Urines for OPIOIDS

- Located in column L
- Enter the number of positive urines for OPIOIDS in the current month

3			
4			
5	<i>OUTCOMES IN CURRENT MONTH</i>		<i>METHADONE</i>
6	positive urines	positive urines for <u>non</u> -opioids	LAAM dose
7	for OPIOIDS in	in current month (EXCEPT	converted to
8	current month	cannabinoids or alcohol)	methadone (mg)
9	0	0	67
10	0	0	0

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Positive Urines for Non-OPIOIDS

- Located in column M
- Enter the number of positive urines for Non-OPIOIDS in the current month
- Do not count positive urines for cannabinoids or alcohol

3			
4			
5	<i>OUTCOMES IN CURRENT MONTH</i>		<i>METHADONE</i>
6	positive urines	positive urines for <u>non</u> -opioids	LAAM dose
7	for OPIOIDS in	in current month (EXCEPT	converted to
8	current month	cannabinoids or alcohol)	methadone (mg)
9	0	0	67
10	0	0	0

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Methadone Dose Equivalency

- Located in column N
- Numbers in this column will appear automatically
- Excel will convert all LAAM doses to methadone
- You do not need to do anything with this column

3			
4			
5	<i>METHADONE EQUIVALENCY</i>		
6	LAAM dose converted to methadone (mg)	methadone dose for all patients	
7			
8			
9	67	67	
10	0	75	
11	0	80	

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Methadone Dose for all Patients

- Located in column O
- Numbers in this column will appear automatically
- You do not need to do anything with this column

3			
4			
5	<i>METHADONE EQUIVALENCY</i>		
6	LAAM dose converted to methadone (mg)	methadone dose for all patients	
7			
8			
9	67	67	
10	0	75	
11	0	80	

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Sums Columns

- Columns P, Q, & R are columns you can add yourself
- Each column is set up to create a SUM of any numbers you enter
- These columns will not be displayed graphically, but can be handy if you want to keep track of how many group counseling sessions each patient attended or track other changes
- The summed totals will appear in the *Counselor Statistics* row at the end of each counselor's data

58

Slide 59

Counselor AOS Scores

- The *Case Management Log* will configure the *Abstinence Orientation Scale (AOS)* score of each individual counselor and the average *AOS* score for the clinic
- Go to the *AOS* Sheet tab
- Enter each counselor's responses, ranging from 1-5, to all 14 *AOS* items
- If a counselor did not answer a question, either leave the cell blank or enter a "0"
- All *AOS* scores will automatically appear in the *Counselor Statistics* row at the end of each counselor's data
- See example of the *AOS* worksheet on the next slide

59

Slide 60

Abstinence Orientation Scale

	AOS1	AOS2	AOS3	AOS4	AOS5	AOS6	AOS Total
Counselor 1	1	2	5	4	2	1	
Counselor 2	1	3	1	2	2	1	
Counselor 3	2	2	2	2	2	2	
Counselor 4	1	2	5	4	2	1	
Counselor 5							
Counselor 6							

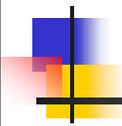
Slide 61

Counselor AOS Scores

- Once the AOS scores are entered, a score is automatically generated
- The scores for each individual counselor appear in the *Counselor Statistics* row at the end of each counselor's data in the *Case Management Log*
- Numbers in this cell will appear automatically

108			
109	Percent of utox screens positive for	Percent of utox screens positive for	Abstinence Orientation Scale (AOS) Score
110	OPIOIDS	NON-OPIOIDS	
111	Past month	Past month	
112	17	19	2.4
113			

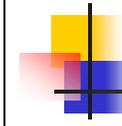
Slide 62



Patient Changes

62

Slide 63

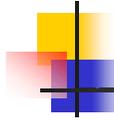


New Patients

- When new patients enter the clinic, don't forget to add them to your caseload so their information can be tracked, too
- To add a new patient, go to the first empty row in your own counselor area in the *Case Management Log* and enter the new patient's data

63

Slide 64



Discharged or Deceased Patients

- If a patient is discharged or deceased, you must delete that patient's entire row of data in order for those numbers not to be figured into the monthly totals
- You won't be able to delete the information in columns N or O because they are automated and contain formulas. Deleting the other information in the row will automatically clear cells N and O.

64

Slide 65



Protection

65

Slide 66

Case Management Log Protection

- The *Case Management Log* is protected so that no labeled cells or formulas can be accidentally deleted
- Don't worry, you can't break it!!



66

Slide 67

Case Management Log Protection

- A warning message will pop up if you try to change a cell that has been protected
- If the warning message does pop up, click the button labeled *OK*



Microsoft Excel

The cell or chart you are trying to change is protected and therefore read-only.

To modify a protected cell or chart, first remove protection using the Unprotect Sheet command (Tools menu, Protection submenu). You may be prompted for a password.

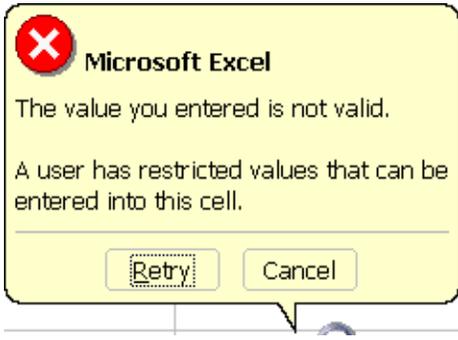
OK

67

Slide 68

Case Management Log Protection

- This is an example of another warning that will pop up if you enter an invalid value into a cell
- If this happens, check the information you are entering to make sure it is correct



68

Slide 69

Case Management Log Errors

- If you get error messages while in the *Case Management Log*, make sure to check the data you are entering!
- There is always human error involved in data entry
- Don't automatically assume errors are due to the design of the spreadsheet

69

Slide 70



Case Management Log Errors

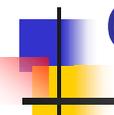
- To help minimize incorrect data entry, a message will pop up when you click on specific cells
- For example, this message states the definition of non-opioids and is a reminder that cannabinoids and alcohol should not be counted toward positive utox screens for non-opioids
- There are other reminder messages for the following cells: clinic entry date, utox screens, and positive opioids

Non-opioids

Non-opioids include cocaine, amphetamines, benzodiazepines, barbiturates, and PCP. DO NOT INCLUDE cannabinoids or alcohol.

70

Slide 71



Outcome Totals

71

Slide 72

Counselor Statistics

- Located at the end of each Counselor’s row
- Numbers in this column will appear automatically
- These numbers will be displayed graphically

108							
109	Totals		Counselor 1 Statistics	% patients on 60 mg or above of methadone or methadone equivalent	% patients on 70 mg or above of methadone or methadone equivalent	% patients on 80 mg or above of methadone or methadone equivalent	Mean # of home visits per week
110							
111			# of patients				
112	C	D					
113	4	3	38	76	45	18	3.0
114							
115							

72

Slide 73

Clinic Statistics

- Located at the bottom of the *Case Management Log* in ROW 1378
- Numbers in this column will appear automatically
- These numbers will be displayed in graphs
- NOTE: the number given in the *Mean # of patients* cell for the clinic totals is a mean, not a sum

1368								
1369								
1370	CASE MANAGEMENT LOG							
1371								
1372								
1373	CLINIC							
1374	Totals		Clinic Statistics	% patients on 60 mg or above of methadone or methadone equivalent	% patients on 70 mg or above of methadone or methadone equivalent	% patients on 80 mg or above of methadone or methadone equivalent	Mean # of take home doses per week	Mean # of counseling visits per month
1375								
1376			Mean # of patients					
1377	C	D						
1378	13	10	31	71	31	11	2.8	1.3
1379								
1380								

73

Slide 74

Graphs

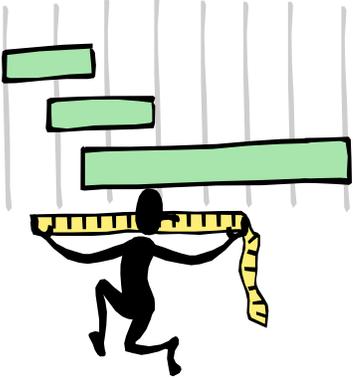


74

Slide 75

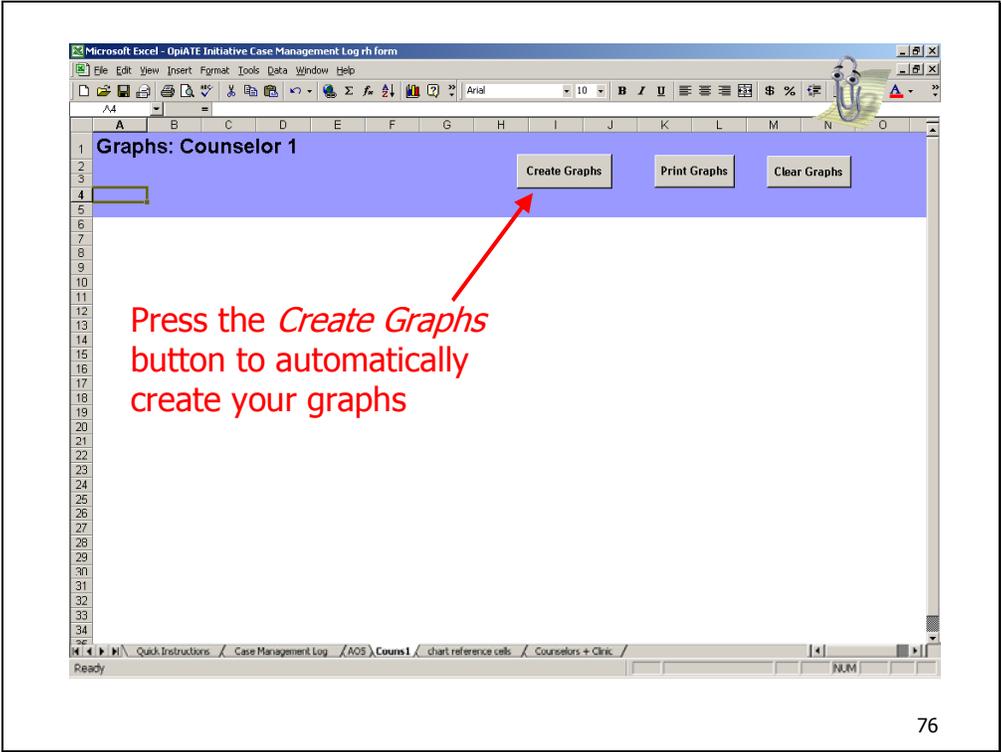
Graphs

- Creating, printing, and clearing graphs while using the *Case Management Log* can be done by simply clicking buttons
- See the next slides for examples



75

Slide 76



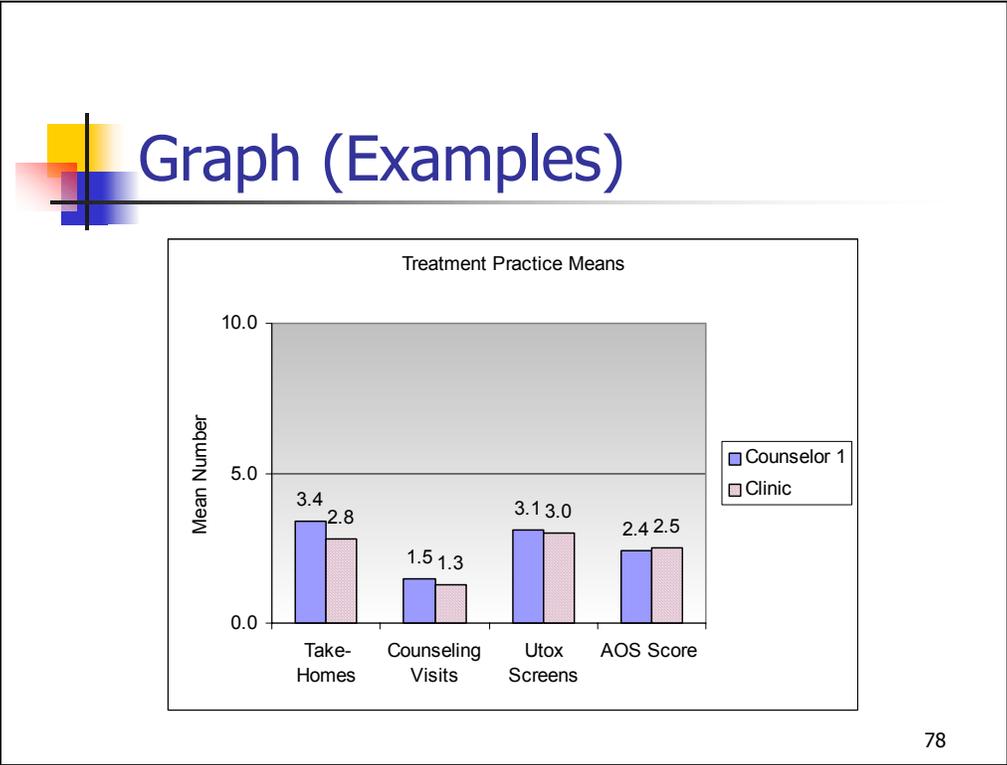
Slide 77

Graph Making

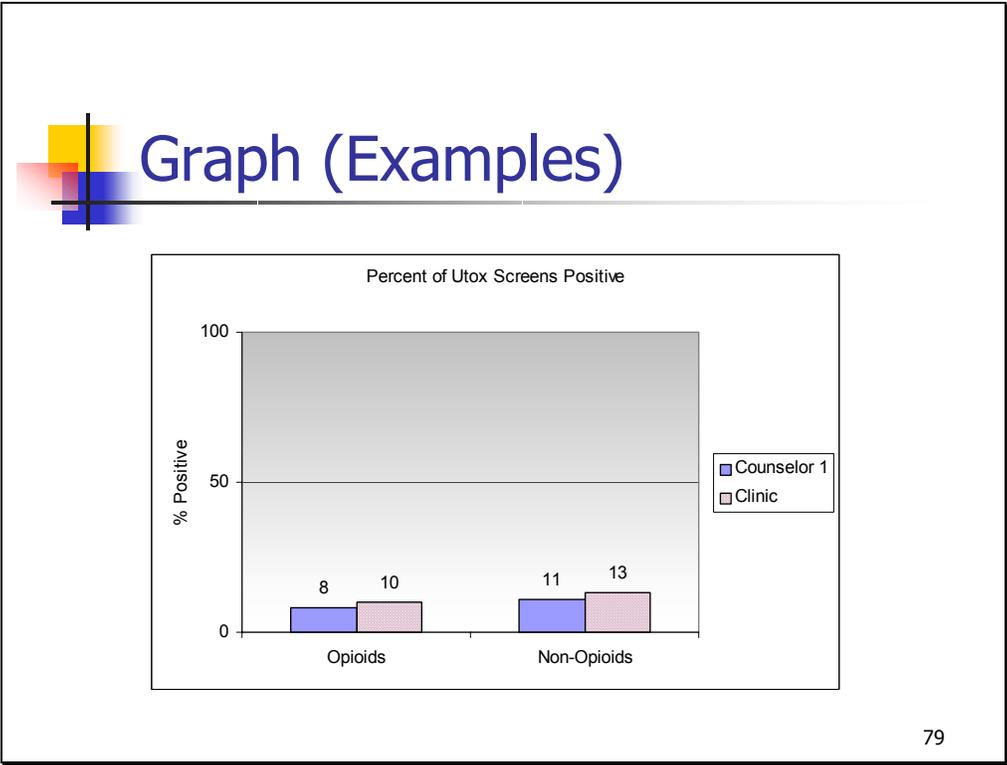
- There are 4 graphs that will come up for each counselor after pressing the *Create Graphs* button
- After pressing this button, you may be prompted for a password before the graphs are created
- If this password prompt does come up, type in the word *opiate*
- Each graph is designed to compare the individual counselor total to the clinic total
- The next 4 slides are examples of the graphs that will pop up

77

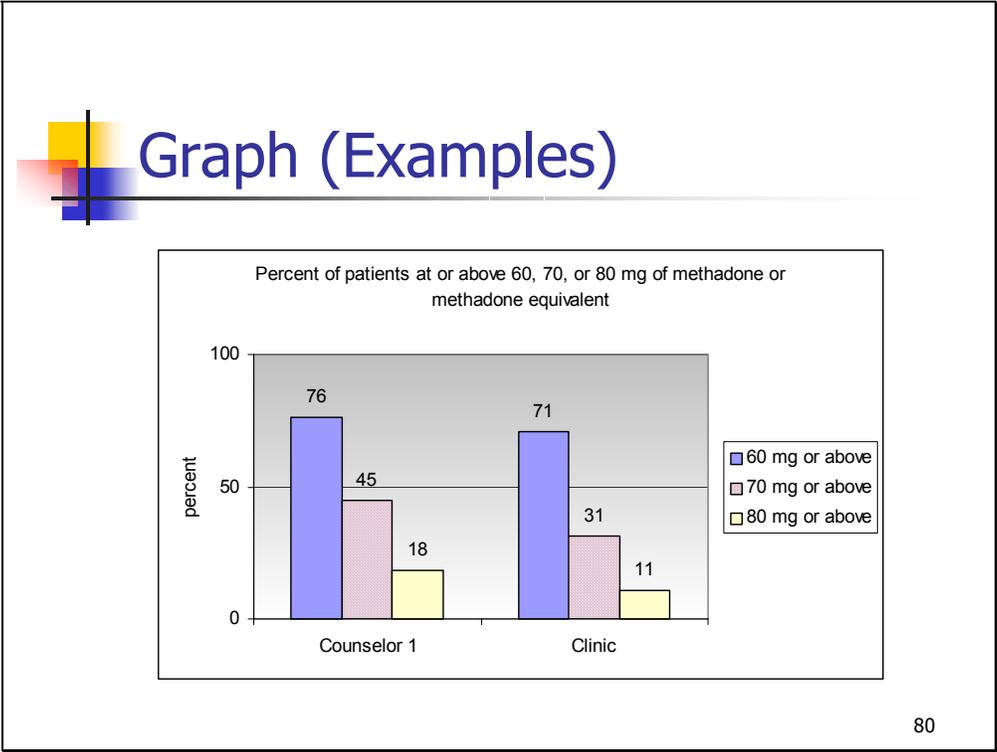
Slide 78



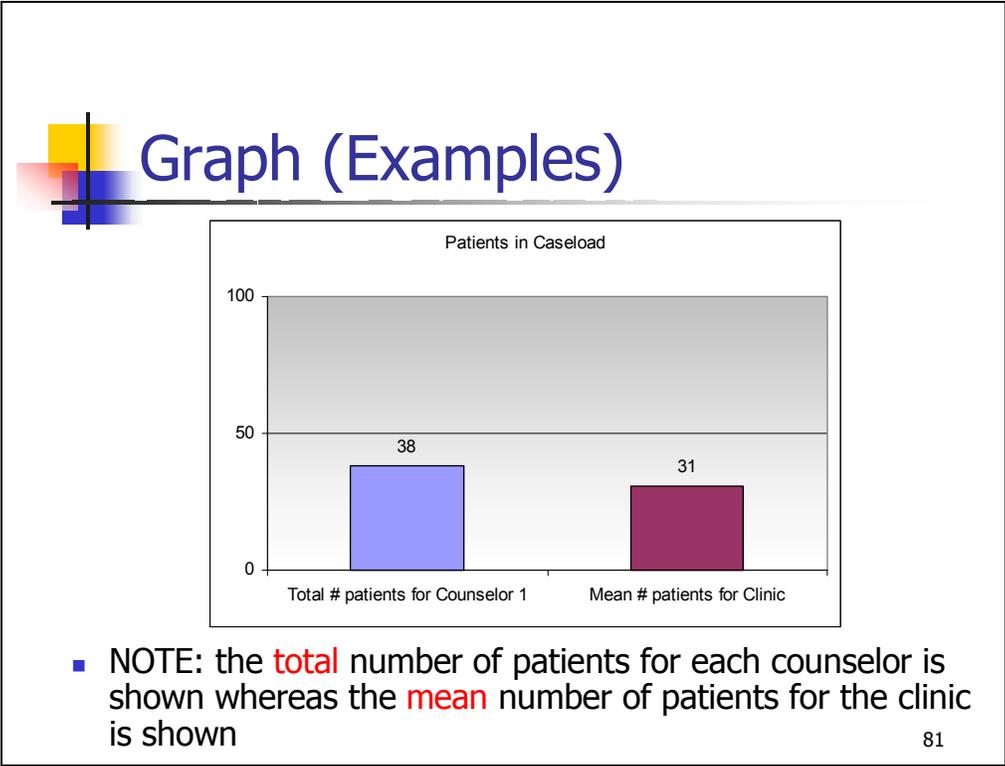
Slide 79



Slide 80



Slide 81



Slide 82

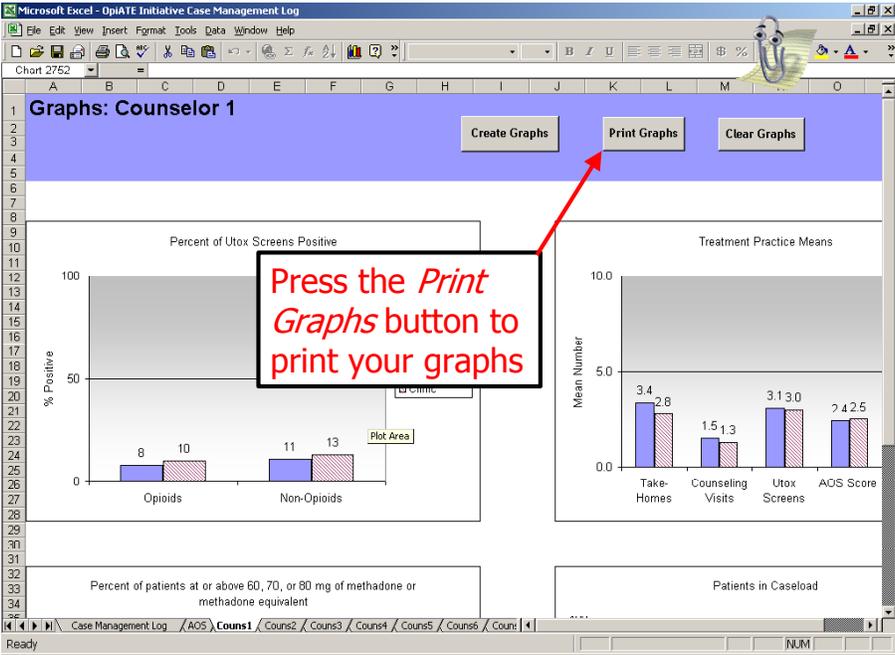
Recommended Clinic Ranges

Here are the recommended ranges for the target areas of this project based on a model clinic.

-  Take-homes per week: 3-3.5
-  Monthly counseling visits: 1-1.5
-  Monthly utox screens: 3-3.5
-  Percent utox screens positive for opioids: 5-10%
-  Percent utox screens positive for non-opioids: 10-15%
-  AOS score: 3 or lower
-  Percent ≥ 60 mg of methadone or equivalent: 75%-85%

82

Slide 83



The screenshot shows a Microsoft Excel spreadsheet titled "Microsoft Excel - OpiATE Initiative Case Management Log". The main area is a dashboard for "Counselor 1" with a blue header containing three buttons: "Create Graphs", "Print Graphs", and "Clear Graphs". A red arrow points from the "Print Graphs" button to a text box that says "Press the Print Graphs button to print your graphs".

The dashboard contains four charts:

- Percent of Utox Screens Positive:** A bar chart comparing Opioids and Non-Opioids. Opioids have 8 positive screens (8%) and Non-Opioids have 11 positive screens (11%).
- Treatment Practice Means:** A bar chart showing mean numbers for four categories: Take-Homes (3.4), Counseling Visits (1.5), Utox Screens (3.1), and AOS Score (2.4).
- Percent of patients at or above 60, 70, or 80 mg of methadone or methadone equivalent:** A chart area with no visible data.
- Patients in Caseload:** A chart area with no visible data.

83

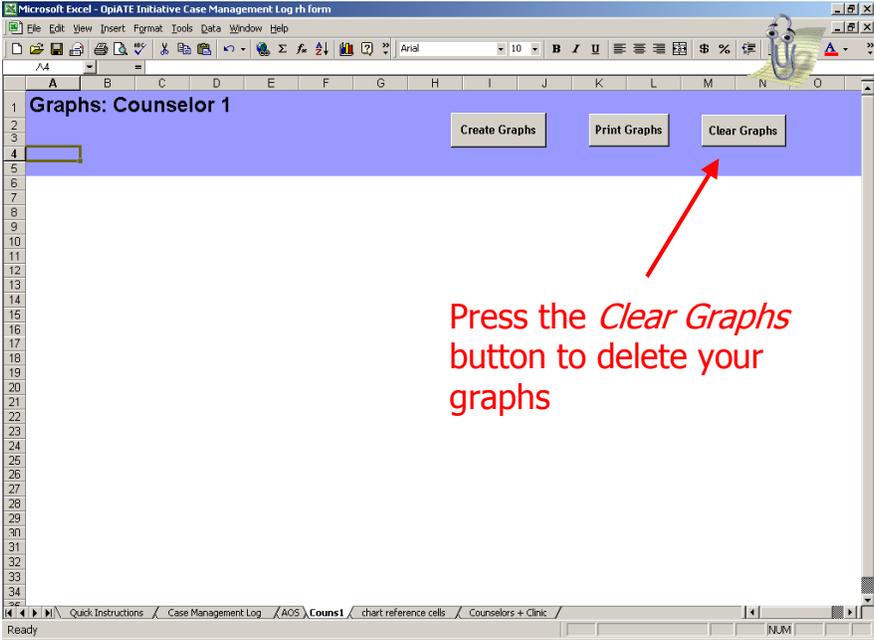
Slide 84

Printing Graphs

- The *Case Management Log* graphs will print on the printer attached to your computer
- The page margins are already set up so that all 4 graphs for each counselor fit on one page

84

Slide 85



Press the *Clear Graphs* button to delete your graphs

85

Slide 86

Graph Info

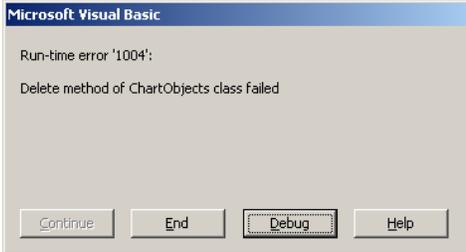


- You do not need to make new graphs every time doses or counseling visits change
- For example, if a patient’s dose was entered incorrectly after the graphs have been made, simply change the dose to the correct number and the graph will automatically adjust to this new number

86

Slide 87

Graph Error

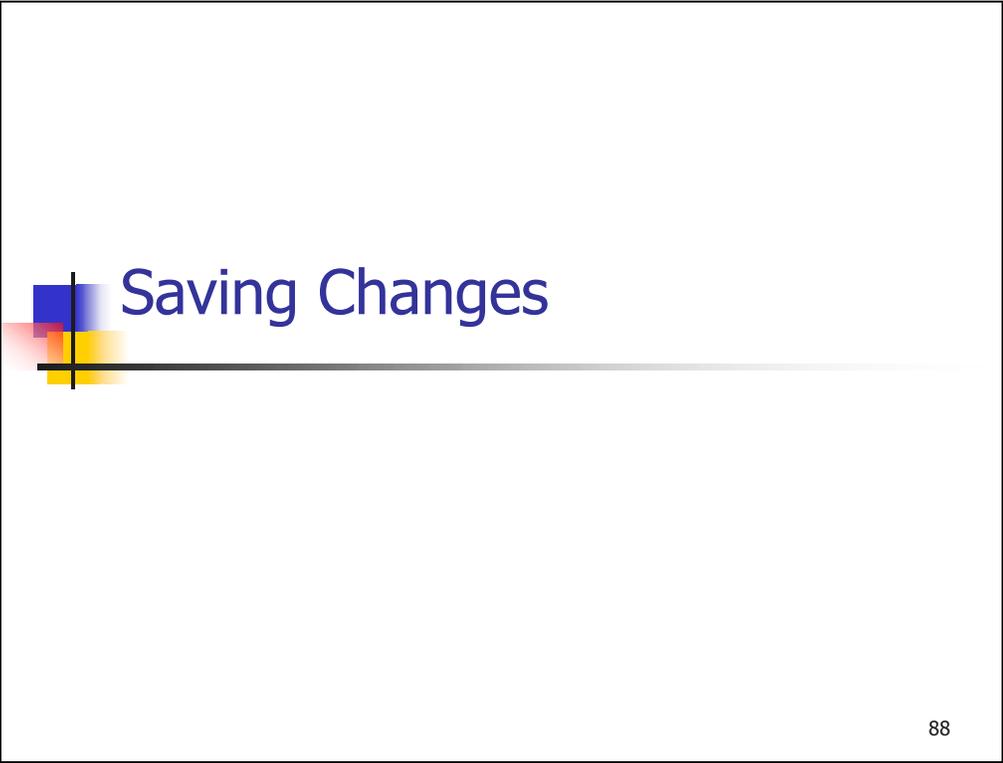


Note: This is not a problem unless you have 10 or more counselors at your clinic and all your graphs will be created at the same time

- The graphs take up so much space in the Excel program that if you create 10 or more graphs at one time, this error will pop up. If this error comes up and you have not saved your changes, you will lose them. For this reason, make sure you save your changes frequently.
- When this warning does pop up, click on either *End* or *Debug*. This will close you out of the program. Then reopen the file and continue making graphs.
- One option (if you have at least 10 counselors at your clinic), is to create graphs for the first 6 counselors, save these changes and close out of the program. Next reopen the program and create the last 7 charts.

87

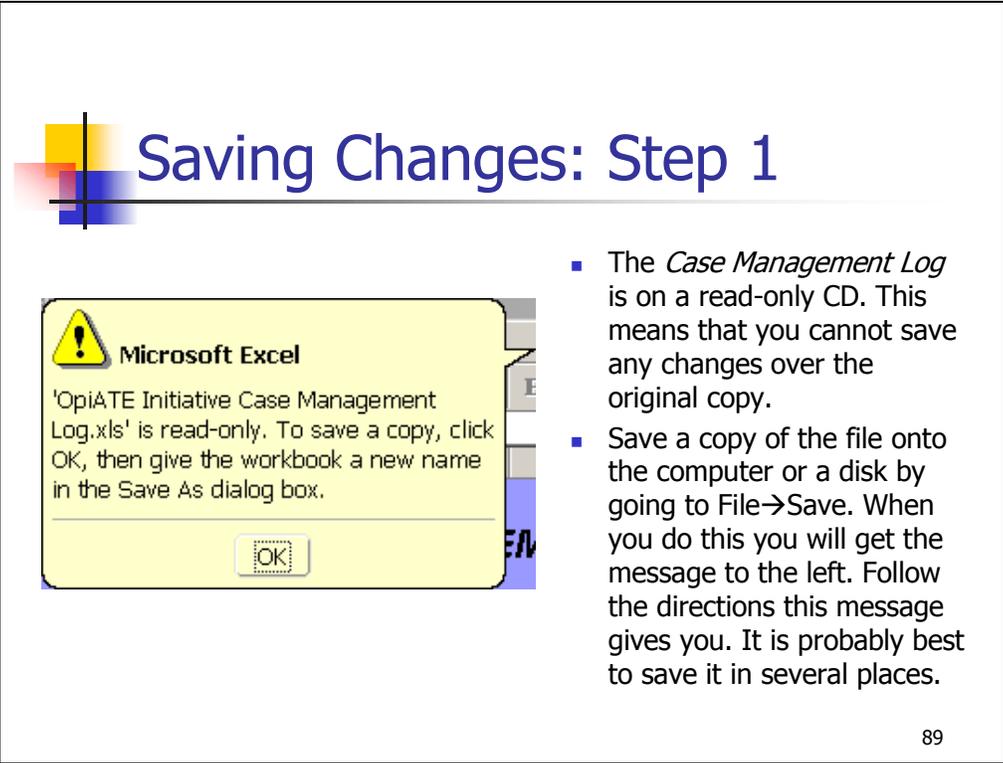
Slide 88



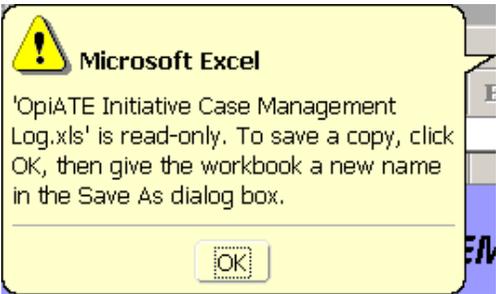
Saving Changes

88

Slide 89



Saving Changes: Step 1



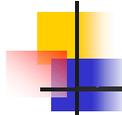
Microsoft Excel
'OpiATE Initiative Case Management Log.xls' is read-only. To save a copy, click OK, then give the workbook a new name in the Save As dialog box.

OK

- The *Case Management Log* is on a read-only CD. This means that you cannot save any changes over the original copy.
- Save a copy of the file onto the computer or a disk by going to File→Save. When you do this you will get the message to the left. Follow the directions this message gives you. It is probably best to save it in several places.

89

Slide 90



Important!

- When you save this file in another place, be sure to give the spreadsheet the same file name (OpiATE Initiative Case Management Log) to ensure the proper functioning of the spreadsheet
- The graphs are linked to the specific name of the file. By changing the file name the graphs are rendered inactive
- Instructions for changing the file name for record keeping purposes will be talked about on Slide 99

90

Slide 91



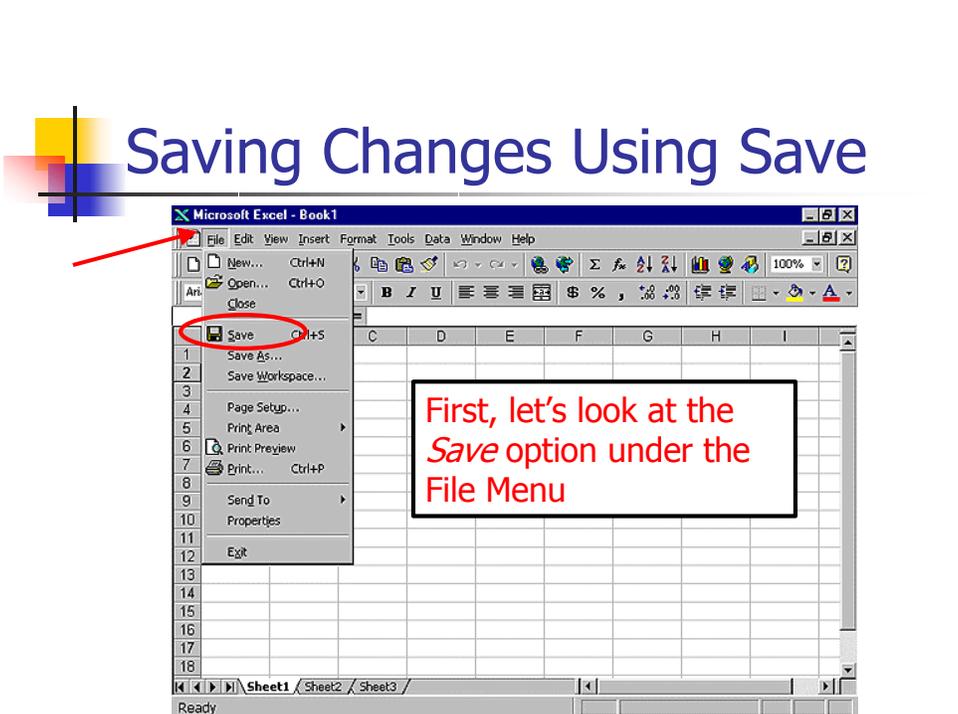
Saving Changes

- Because the *Case Management Log* has multiple users it is important for everyone to understand how to correctly save changes that have been made to the Excel file
- There are 2 options to choose when saving any file: *Save* or *Save As*

91

Slide 92

Saving Changes Using Save



First, let's look at the *Save* option under the File Menu

92

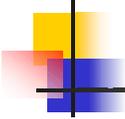
Slide 93

Saving Changes Using Save

- Choosing *Save* will save the changes that you made to the *Case Management Log* using the same file name
- No box will pop up; once you click *Save*, all changes are saved
- When entering the current month's data, you must use the *Save* option

93

Slide 94



Saving Changes

- Nothing is more frustrating than updating a file and then losing all of the changes you made due to a computer glitch
- One way to minimize this frustration is to save changes frequently and in multiple places (e.g., zip disk, CD, and/or hard drive)!
- Try to save changes every 10 minutes

94

Slide 95



Saving Changes: Step 2

- Remember to enter all counselor data and to make all counselor graphs before you rename the OpiATE Initiative *Case Management Log* for record keeping purposes
- After renaming the *Case Management Log*, you will not be able to make changes to the graphs

95

Slide 96



Important!

- If some counselors create graphs before all data are entered, the clinic numbers will not be consistent because all counselor data will not be included in clinic totals

96

Slide 97



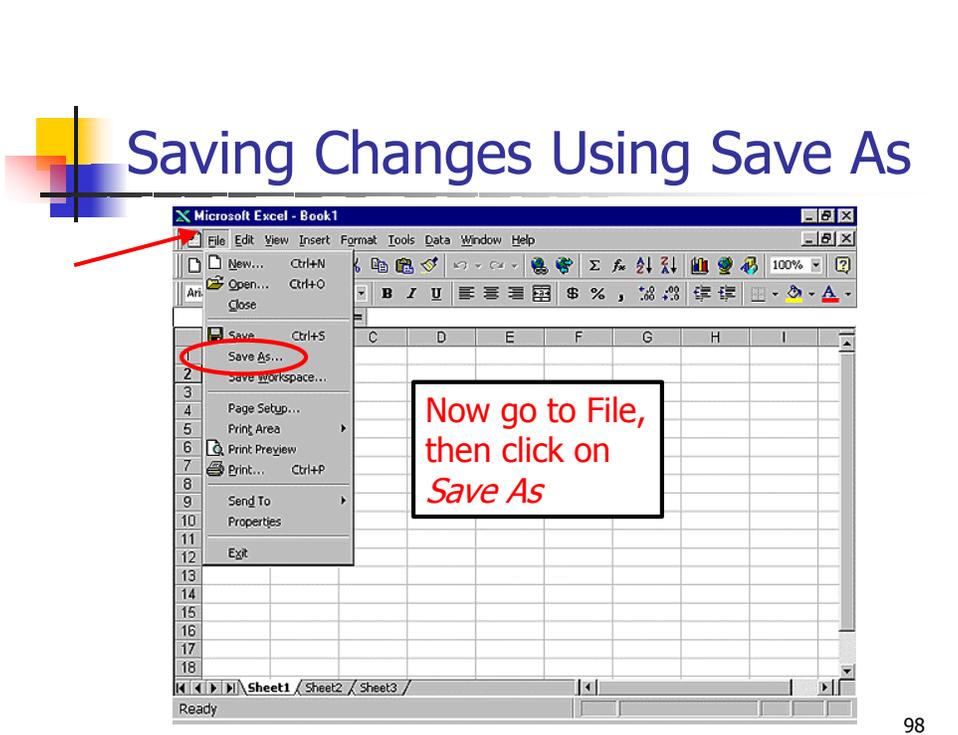
Saving Changes Using Save As

- Second, let's look at the *Save As* option
- Choosing the *Save As* option will allow you to rename the file

97

Slide 98

Saving Changes Using Save As



The screenshot shows the Microsoft Excel - Book1 window. The File menu is open, and the 'Save As...' option is circled in red. A red arrow points to the File menu. A text box with a black border and red text says: "Now go to File, then click on Save As".

98

Slide 99

Record Keeping Using Save As

- It is a good idea to keep a record of the data and graphs for each month
- To do this, you will use the *Save As* option
- Let's use July as the current month for an example
- Before you can make a file for July, all counselors need to be up-to-date with their data entry for the month of July
- All graphs need to be created because once the file name is changed, the graphs can no longer be re-created

99

Slide 100

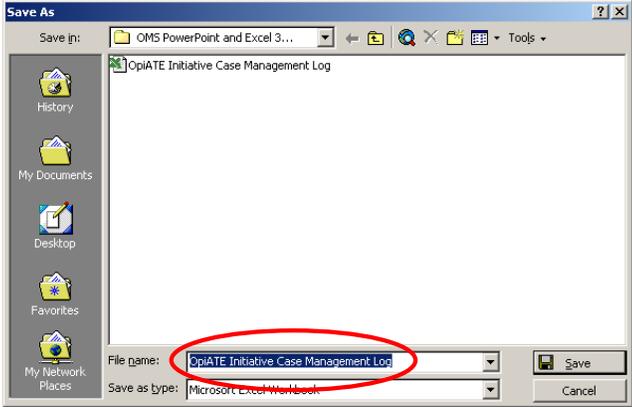
Remember...

- After all data are entered and all graphs are made, save the file using the *Save* option one more time to make sure all changes are saved to the OpiATE Initiative *Case Management Log*
- This will ensure that when entering the data for August, all patient and counselor information will be up to date
- After you do this you can change the file name

100

Slide 101

Record Keeping Using Save As

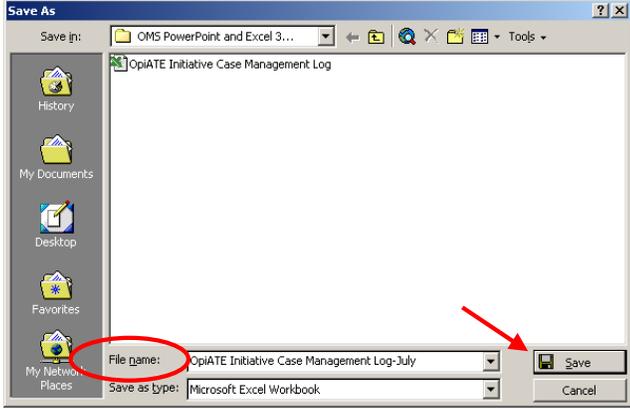


- This box will appear and the name of the file will be highlighted

101

Slide 102

Record Keeping Using Save As

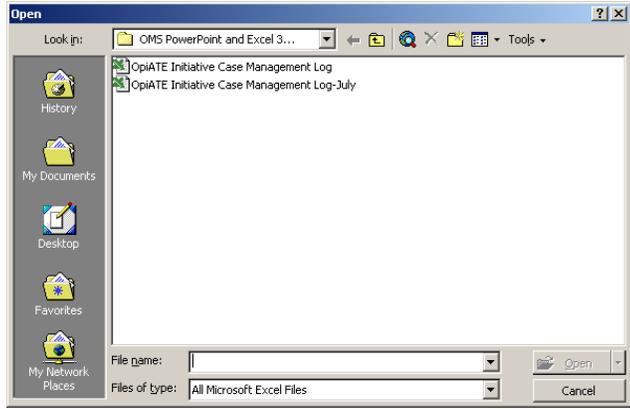


- Click in the file name box and type the word July at the end of the file name
- Then click Save
- You could also delete the entire file name and just use *July 2003* or whatever is easiest for your record-keeping needs

102

Slide 103

Record Keeping Using Save As

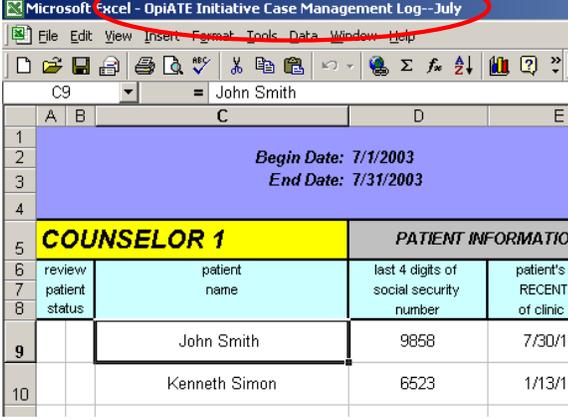


- Notice that when you reopen the file, there are 2 files instead of 1: the original *Case Management Log* and the *Case Management Log* for the month of July

103

Slide 104

Record Keeping



Microsoft Excel - OpiATE Initiative Case Management Log--July

File Edit View Insert Format Tools Data Window Help

C9 = John Smith

	A	B	C	D	E
1					
2			<i>Begin Date: 7/1/2003</i>		
3			<i>End Date: 7/31/2003</i>		
4					
5			COUNSELOR 1	PATIENT INFORMATION	
6	review		patient	last 4 digits of	patient's r
7	patient		name	social security	RECENT
8	status			number	of clinic e
9			John Smith	9858	7/30/19
10			Kenneth Simon	6523	1/13/19

- If you are ever unsure about which files you are changing, look at the top bar that displays the file name

104

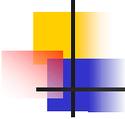
Slide 105

Record Keeping Using Save As

- Using this record keeping system, you have a file with all July data. Then you can use the original file named OpiATE Initiative *Case Management Log* for your August data. You only need to delete cells that change on a monthly basis (e.g., number of counseling visits, number of utox screens, etc.).
- You do not need to delete other patient information (e.g., patient name, SSN, dose), unless that information has changed or a patient is discharged or deceased.
- After all counselor data are entered and all graphs are made for the month of August and subsequent months, you'll be able to repeat the record keeping process in order to keep track of all monthly data

105

Slide 106



Saving Changes: Save As

- Last but not least!
 - Once the file name is changed from OpiATE Initiative *Case Management Log* to a new name, you cannot delete the graphs and then recreate them!

106

Slide 107



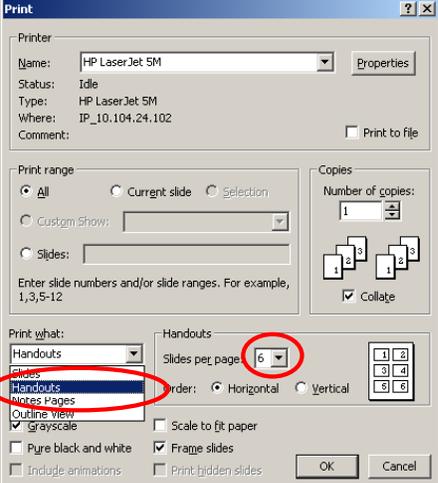
Printing

107

Slide 108

Printing PowerPoint Slides

- To print these slides, Go to Print on the drop down menu
- This box will appear
- Choose handouts
- Choose how many slides you want to print on each page
- Click OK



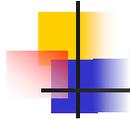
108

Slide 109

Counselor Logs

109

Slide 110

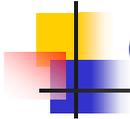


Counselor Logs in Excel

- There is a sheet tab in the *Case Management Log* labeled *Counselor Logs*
- Each patient's stable data from the past month (e.g., name, social security number, clinic entry date, etc.) transfers to this log so only patient data for the current month (e.g., counseling visits, utox screens, etc.) need to be entered
- These logs eliminate the need to re-enter each patient's entire row of data every month

110

Slide 111



Counselor Logs in Excel

- If you choose, these sheets can be printed for each counselor so values can be entered onto a hard copy first and then transferred to the Excel *Case Management Log*
- Printing Counselor Logs eliminates the need to find a computer every time patient data need to be entered or changed

111

Slide 112

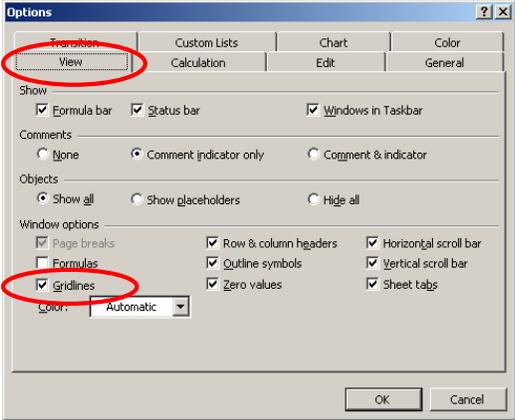
Printing Counselor Logs in Excel

- Printing the Counselor Logs can be done very easily
- The margins for the Counselor Logs are set up to print 20 patients to each page
- Each counselor has 5 pages of logs

112

Slide 113

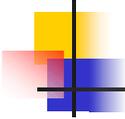
Printing Counselor Logs in Excel



- Go to TOOLS on the main menu, then click on options
- This window will come up
- Click on the VIEW tab
- Make sure *Gridlines* is checked so all lines print on the counselor logs

113

Slide 114

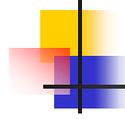


Printing Counselor Logs in Excel

- When you print, it is very important that you specify a page range
- If you just click *print* and do not specify a page range, all 60 pages will print
- In most cases, all counselors will print their own logs using the pages specified in the chart on the next slide

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Slide 115



Printing Counselor Logs in Excel

Counselor 1	Pages: 1-5	Counselor 7	Pages: 31-35
Counselor 2	Pages: 6-10	Counselor 8	Pages: 36-40
Counselor 3	Pages: 11-15	Counselor 9	Pages: 41-45
Counselor 4	Pages: 16-20	Counselor 10	Pages: 46-50
Counselor 5	Pages: 21-25	Counselor 11	Pages: 51-55
Counselor 6	Pages: 26-30	Counselor 12	Pages: 56-60

115

Slide 116

Printing Counselor Logs in Excel

■ Click on the box shown in the picture

COUNSELOR 1		PATIENT INFORMATION	
review patient status	patient name	last 4 digits of social security number	
	John Smith	9858	
	Kenneth Simon	6523	
	Genrae Johnson	5842	

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Slide 117

Printing Counselor Logs in Excel

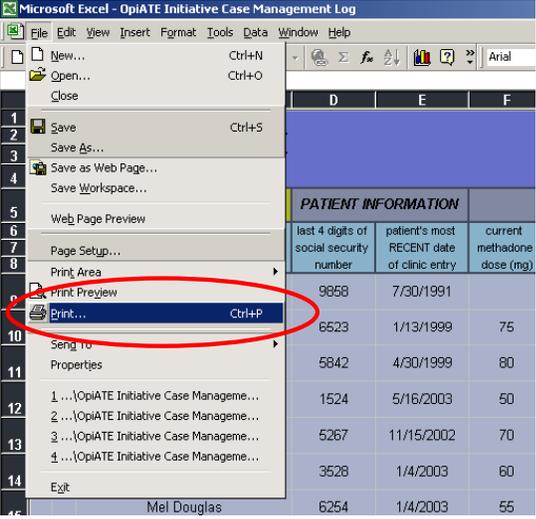
■ Clicking on this box will highlight all counselor log pages

COUNSELOR 1		PATIENT INFORMATION		
review patient status	patient name	last 4 digits of social security number	patient's r	RECENT
		number	of clinic e	
	John Smith	9858	7/30/19	
	Kenneth Simon	6523	1/13/19	

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Slide 118

Printing Logs in Excel



Microsoft Excel - OpiATE Initiative Case Management Log

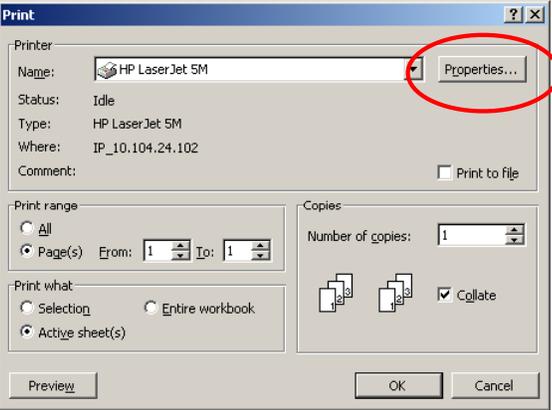
PATIENT INFORMATION		
last 4 digits of social security number	patient's most RECENT date of clinic entry	current methadone dose (mg)
9858	7/30/1991	
6523	1/13/1999	75
5842	4/30/1999	80
1524	5/16/2003	50
5267	11/15/2002	70
3526	1/4/2003	60
Mel Douglas	6254	1/4/2003 55

- After you have highlighted all cells and decided which pages you want to print, Go to the File menu and click on *Print*

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Slide 119

Printing Logs in Excel



Print

Printer: HP LaserJet 5M Properties...

Status: Idle
Type: HP LaserJet 5M
Where: IP_10.104.24.102
Comment: Print to file

Print range:
 All
 Page(s) From: 1 To: 1

Print what:
 Selection
 Entire workbook
 Active sheet(s)

Copies:
Number of copies: 1
 Collate

Buttons: Preview, OK, Cancel

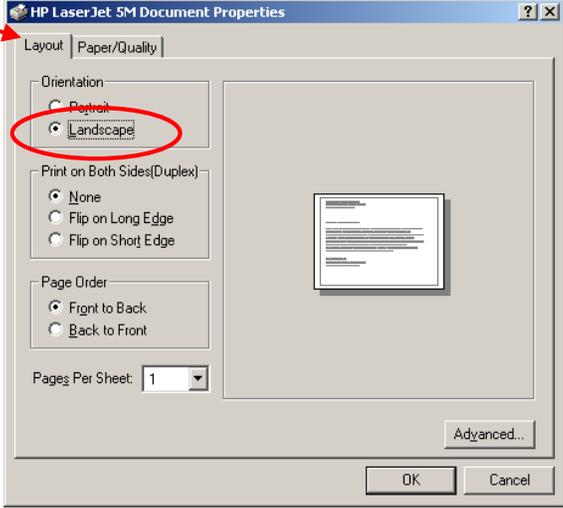
- This box will come up
- Left click on *Properties*

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Printing Logs in Excel

- It is important to make sure the Counselor Logs print in *Landscape* so they fit nicely on each page
- Click on the *Layout* tab
- Then click on *Landscape*
- Click *OK*

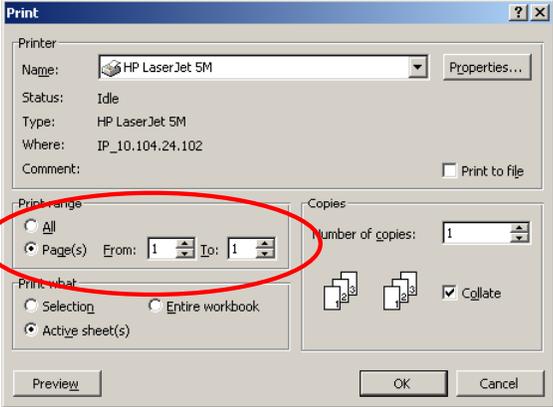


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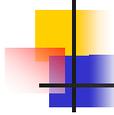
Printing Logs in Excel

- Now it is time to specify the page range
- Put the page numbers you want to print into the Print Range area
- Click *OK*



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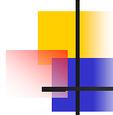
Wrapping Up



- Now that you have learned how to enter data and create graphs using the *Case Management Log* spreadsheet, go to the Excel file and try it out yourself!
- Good Luck!

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Contact Information

- If you need technical assistance, please contact:
 - Nancy Pexa, MS
OpiATE Initiative Research Project
Minneapolis VA Medical Center
Phone: (612) 467-5737
Email: nancy.pexa@med.va.gov

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