GAIN Data Manager Monthly Checklist

Chestnut Health Systems will pull data from the GAIN ABS accounts on the 5th of each month. In preparation, please have the following completed before this time:

- Enter all assessments into GAIN ABS by 5:00 pm CST. This includes all initial GAIN assessments, as well as any follow-up assessments and the TxSI (if applicable).

- *If applicable:* Review the Follow Ups Due report in GAIN ABS. Any client that is listed under the red section of this report will need their follow-up status code updated. Any codes that are not updated will result in a GAIN edit.

- *If applicable:* Review the Treatment Log reminders in GAIN ABS to ensure each client entered into GAIN ABS has treatment information included. Any client with missing treatment information will result in a GAIN edit.

- Post the GAIN Edits reply file (saved with "_reply" at the end of the document name) to your Box folder and email DataSubmit@chestnut.org to notify the GAIN Data Management team that the file has been posted.

Step-by-Step Walkthrough of Data Manager's Monthly Responsibilities

As mentioned above, Chestnut Health systems will pull your data on the 5th of each month at 5:00 pm CST. Your GAIN Data Management lead at Chestnut will also send an email before the data submission date reminding you of what needs to be done prior to the submission deadline (outlined above). In this next section, we will outline these required steps in more detail.

After pulling a site's data on the 5th of each month, the GAIN Data Management team will process your site's data and create detailed feedback in the form of GAIN edits (in Microsoft Excel format).

Once processing has been completed (approximately 2 weeks following the data pull), your GAIN Data Management lead will post your site's GAIN Edits file to your Box folder and will email your site to notify the Data Manager that the GAIN Edits file has been posted to the Box folder. This is where the Data Manager begins to prepare data for the following month's data pull.

Updating GAIN Edits and information in GAIN ABS

1. Once notified by the GAIN Data Management team that your site's GAIN Edits file has been posted to Box, the Data Manager at your site must first download the GAIN Edits file from the Box folder to their computer.
    a. Navigate to your agency's Box folder. The GAIN Edits email will include a direct link to the folder. *You may be required to log into Box if you are not logged in already.*
    b. Download the file from Box. You can do this one of two ways:
        i. **Option 1:** You will see a box with three dots to the right of the file. Clicking this and menu will appear. Choose Download. Depending on your browser, you will have to open the file or save the file to where your files are normally saved on your computer *(Figure 1).*

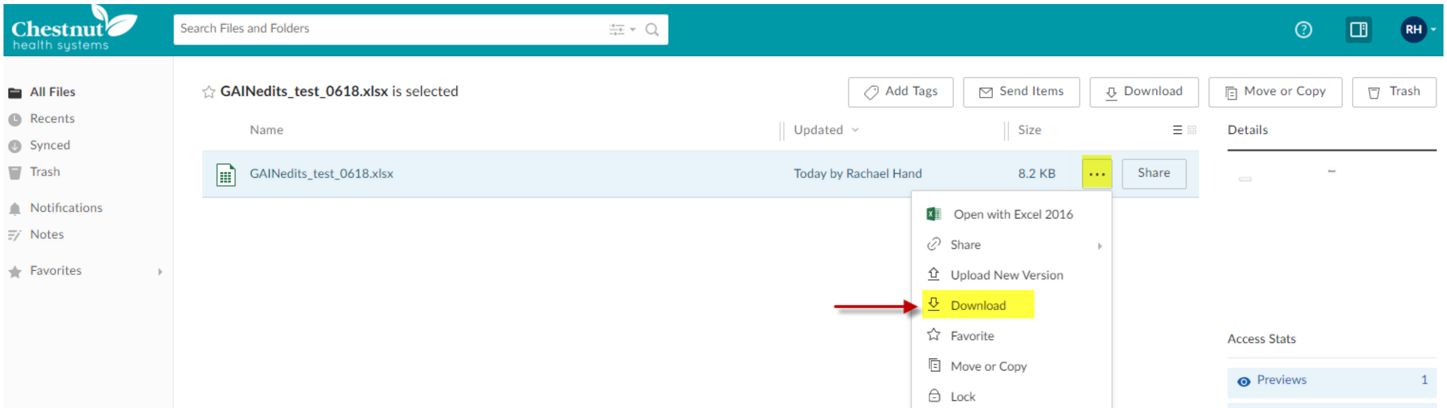

Figure 1

ii. **Option 2:** Once the file is selected, options will appear above the file. Choose the Download icon. *(Figure 2).*

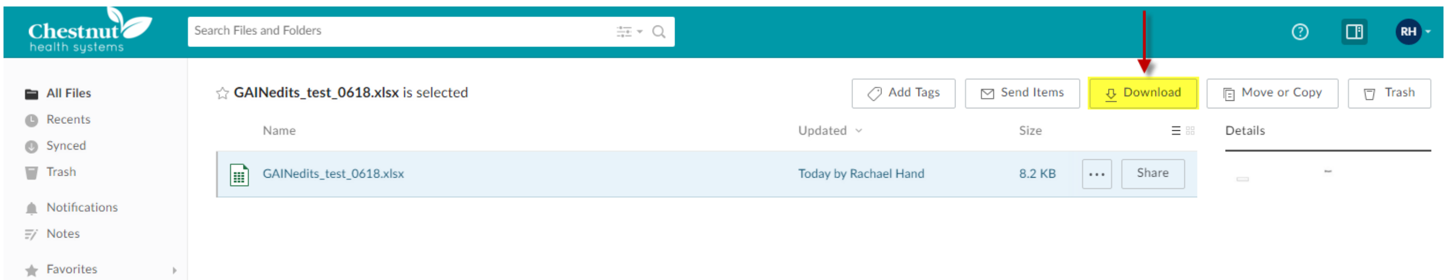

Figure 2

c. Open the file from the location where you saved it. Once the file is open, re-name the GAIN Edits file with "_reply" at the end of file name (e.g."GAINedits_test_MMYY_reply.xls").

2. Once you have downloaded the GAIN Edits file from Box and saved it to your computer, you will want to begin addressing the edits.
   a. To address the edits, you will first need to open the GAIN Edits file that you downloaded from Box.
   b. You will then address edits in all tabs of the GAIN Edits file. You will notice that, at the bottom of the file, there will be a tab for each version of the assessment (i.e. GAIN-I, GAIN-M90, GAIN-Quick) that edits have been created for.
   c. To address the edits, first read each edit to determine whether it is something that can be updated without contacting the client (e.g. Z1-Z1d, XADMa1a-XADMa2z items). If a client needs to be contacted regarding a response (e.g. clarification is needed or the response is causing an inconsistency), follow your site's protocol for contacting the client to resolve the issue.
   d. Once a valid response is determined, enter GAIN ABS, locate the assessment identified in the GAIN Edit, and update the item(s) in the assessment. Be sure to hit "Next" after updating each item to ensure the item updates appropriately. Once you have updated the necessary item(s) in that assessment, select the navigation menu at the bottom of the screen and click "Finish."
      i. **Note:** If an item in the Client Demographic page (e.g. date of birth) or assessment header (e.g. Check Digit, Observation Value, start time) needs to be updated, update the appropriate information and be sure to hit "Save" to ensure the information updates appropriately.
      ii. **Follow-Up Log** edits will need to be updated in the Follow-Up Log data entry screen.
      iii. **Treatment Log** edits will need to be updated in the Treatment Log data entry screen.
   e. Once the edit has been addressed and updated in GAIN ABS, include a note in the "Site Response" column in the GAIN Edit file to indicate that the issue was resolved.

   i. If the issue *cannot* be resolved (e.g. client has been discharged and cannot be contacted for follow-up), please also let us know in the "Site Response" column.
f. Be sure to save the file once you are done updating the necessary information.

Review the Follow-Ups Due Report in GAIN ABS (*if applicable)*

1. The Follow Ups Due Report can be found by clicking on the "Site Reports" button in the top, right-hand corner of the GAIN ABS header.
2. After clicking "Site Reports," select the "Follow Ups Due" link under Follow Up Log Reports.
3. Any clients who have information in the red, "Follow Ups Uncollectable" section will need to be updated in GAIN ABS. Any clients who are in this section whose information is not updated prior to the next data submission deadline will result in a GAIN Edit.
   a. You can update a client's information by clicking on their Participant ID in the left-hand side of the box.
   b. Once on the client's individual Follow Up Log Data Entry page, the date of the missed assessment will be highlighted in red, and the status of "Uncollectable" will be seen under the "Current status" column.
   c. Update the client's status using the drop-down menu under "Update Status" to indicate why that assessment was not completed.
   d. Once finished, be sure to click "Update" at the bottom of the page to ensure the information updates appropriately.

Review the Treatment Log Reminders in GAIN ABS (*if applicable)*

1. The Treatment Log Report can be found by clicking on the "Site Reports" button in the top, right-hand corner of the GAIN ABS header.
2. After clicking "Site Reports," select "Treatment Log Reminders" – this will direct you to the Treatment Log reminders, which will list clients who do not have treatment information entered into GAIN ABS, clients who have not been discharged after 6 months in treatment, and clients who have not been discharged after 12 months in treatment.
3. Update Treatment Log information for any clients needing updates by clicking on their Client ID.
   a. **No Treatment Information:** If the client has no treatment information entered in GAIN ABS, click "Add New Treatment" on the Treatment Log Data Entry page and enter the client's treatment information. Be sure to click "Submit" to ensure the information updates appropriately in GAIN ABS.
   b. **Missing Discharge Information:** If the client is missing discharge information and has been discharged from treatment, click on their Client ID to navigate to their Treatment Log Data Entry screen in GAIN ABS.
      i. Once there, select the client's treatment episode by clicking the "Select" button to the right of the treatment episode.
      ii. Click the "Edit row" button at the bottom of the page.
      iii. Enter the client's discharge treatment (Program Discharge Status, Program Discharge Date, and Discharge Destination Site Level of Care) and click "Update" once the information has been entered.

Once all issues have been addressed in GAIN ABS, post your GAIN Edits reply file to your agency's Box folder and email DataSubmit@chestnut.org to notify your GAIN Data Management lead that your GAIN Edits reply file has been posted. *Be sure to include your project and site name in the title of your email.*

Posting your GAIN Edits reply file will be similar to how you download the file from Box.

1. Log into Box
2. Navigate to your agency's Box folder, or click on the original link in the GAIN Edits email you received from the GAIN Data Management team.
3. *If using Google Chrome or Mozilla FireFox* – Drag the file from your file folder on your computer to your site folder on Box (*see Figure 3).*

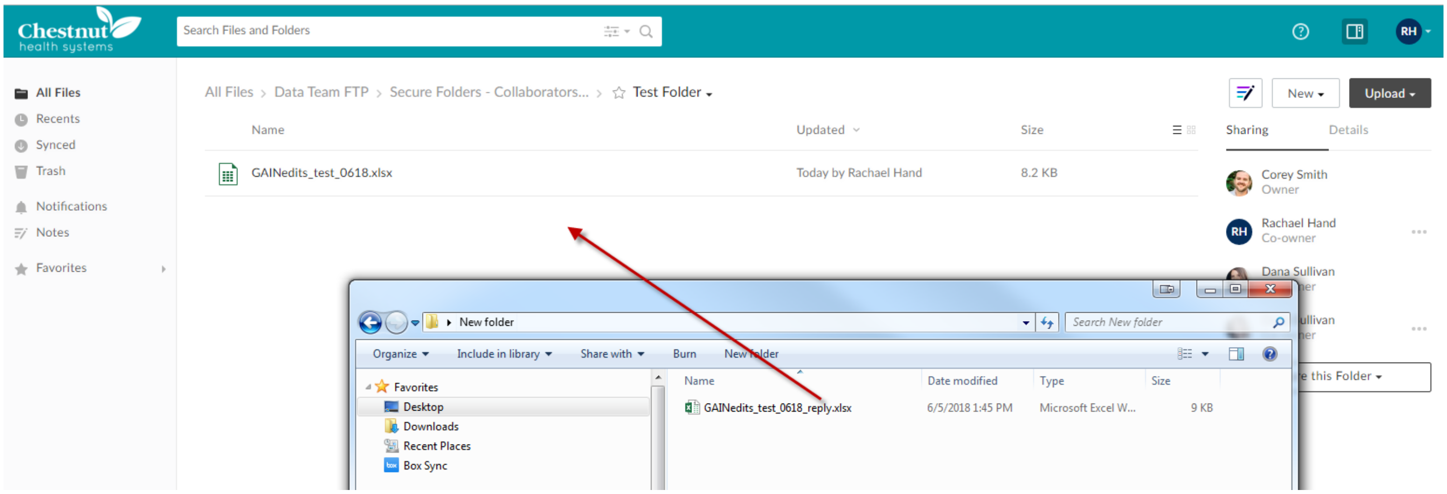

Figure 3

You can also choose the Upload button →Upload files and navigate to where the GAIN Edit reply file is saved on your computer *(Figure 4).*

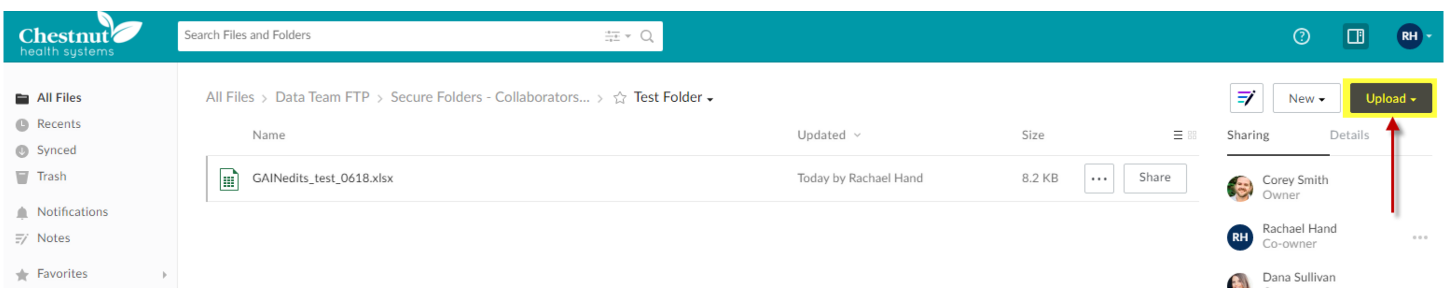

Figure 4

4. After the file has successfully posted to Box, send an email to DataSubmit@chestnut.org with your project name and Site ID in the subject line.
5. Your GAIN Data Management lead will then pull your GAIN Edits reply file from Box and will update our master GAIN Edits file with your responses. You should expect to receive an email indicating that we have successfully retrieved your GAIN Edits and file and have updated your responses in our master file.

Final step: Prior to the deadline (5:00 pm CST on the 5th of each month), be sure that all above steps have been completed and that all assessments completed prior to the submission deadline have been entered in GAIN ABS.

Additional Resources

If you have additional questions regarding the GAIN Edit process, it may be helpful to refer to the GAIN Data Manager manual, or to review the Data Manager online Moodle training course. If you do not already have access to these materials, please do not hesitate to contact DataSubmit@chestnut.org for assistance and we will gladly set you up with any necessary materials.