

# Don't Let the Tail Wag the Dog

How one hospital-based domestic violence program in Massachusetts has taken control of its data management and reporting needs

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# Educational Objectives

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- Describe the data management and reporting challenges that Boston Medical Center's DV Program faced.
- Demonstrate the features and flexibility of *EmpowerDB* that have empowered the DVP to overcome these challenges.

# BMC Domestic Violence Program provides:

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- Training and education
- Policy/Protocol development support
- Consultation and technical assistance
- Connection to community resources
- Intranet website for BMC staff/providers
- **Direct Advocacy services for BMC patients, employees, community members**

# Current funding source breakdown

Total 3.0 FTE for Direct Advocacy Services

Source	FTE
Office for Victims of Crime / VOCA	1.175
Office on Violence Against Women / VAWA STOP	0.8
Donor Support and Program Fundraising	0.6
BMC Operating Budget	0.425
<b>Total</b>	<b>3.0</b>

# Problems with collecting data for multiple stakeholders

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The following problem areas will be addressed:

- Funders Ask Same Questions, Give Different Criteria
- Data Completion
- Separating Clients by Funder
- Previewing Data Before Running Final Report
- Database Development Costs

# Same Questions, Different Criteria

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## **Problem:**

- Funders all ask basically the same questions, but don't ask them in the same way.
- Examples: Race, Ethnicity, Age Groups, Services Provided, Consultations Provided, Trainings Provided
- Internal needs differ from funder needs

## **Solution:**

- For each data point, create a master list that meets the needs of all parties
- Program database to understand how each option on the master list translates to each funder report

# Forming a Master List: Client Referred From

Funder A
Self/Family/Friend
Non-VOCA Staff Within Agency
Police
Court Personnel
Legal Services
Shelter/Safe Home
Social Services
Mental Health Agency
Other Victim Service Agency
Community Organizations
Other (specify)
Unknown

Funder B
Hospital
Police
Government Agency
Community Organization
Friend
Family
Court/Law Office
Other
Unknown

Internal Needs
BMC: Ambulatory
BMC: ER
BMC: In-patient
BMC: Social Work
BMC: Physician
Local DV Agency ABC
Local DV Agency DEF
Local DV Agency GHI

# Forming a Master List: Client Referred From

Master List
BMC: Ambulatory
BMC: ER
BMC: In-patient
BMC: Social Work
BMC: Physician
Local DV Agency ABC
Local DV Agency DEF
Local DV Agency GHI
Friend
Family
Police
Court
Law Office/Legal Services



# Forming a Master List: Client Referred From

Master List	Converts to 'Funder A' As
BMC: Ambulatory	Non-VOCA Staff Within Agency
BMC: ER	Non-VOCA Staff Within Agency
BMC: In-patient	Non-VOCA Staff Within Agency
BMC: Social Work	Non-VOCA Staff Within Agency
BMC: Physician	Non-VOCA Staff Within Agency
Local DV Agency ABC	Other Victim Service Agencies
Local DV Agency DEF	Other Victim Service Agencies
Local DV Agency GHI	Other Victim Service Agencies
Friend	Self/Family/Friend
Family	Self/Family/Friend
Police	Police
Court	Court Personnel
Law Office/Legal Services	Legal Services

# Forming a Master List: Client Referred From

Master List	Converts to 'Funder B' As
BMC: Ambulatory	Hospital
BMC: ER	Hospital
BMC: In-patient	Hospital
BMC: Social Work	Hospital
BMC: Physician	Hospital
Local DV Agency ABC	Community Organizations
Local DV Agency DEF	Community Organizations
Local DV Agency GHI	Community Organizations
Friend	Friend
Family	Family
Police	Police
Court	Court/Law Office
Law Office/Legal Services	Court/Law Office

# Data Completion

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## **Problem:**

- Last minute scrambling to collect data for reports
- Potentially inaccurate numbers submitted in order to meet deadline
- Staff angst

## **Solution:**

- Collect all data ahead of time
- Leverage database to issue reminders to staff
- Allow supervisors to easily view staff data completion progress
- Staff can enter the important data right away, then come back to other data later

# Homepage Data Completion Reminders

The screenshot shows a web application interface with a top navigation bar containing a home icon, a menu icon, a search icon, and a dropdown menu with 'Program Lists' and 'Add New Client'. The user is logged in as 'Global Admin' and has a dropdown menu for '--Look-up Client Info--'. The main content area is divided into two columns. The left column is titled 'Add Client Activities' and contains several sections: 'Activities For:' with radio buttons for 'Individual Client' (selected), 'Groups', and 'Events'; 'Staff:' with a dropdown menu showing 'Demo User'; 'Client:' with a dropdown menu for '--Enter Client Name--' and a 'Date:' dropdown menu showing '03/18/2015'; 'Add Service(s):' with a 'Service:' dropdown menu for '--Select Service--', a 'Direct:' dropdown menu for '--Time Spent--', a 'Collateral:' dropdown menu for '--Time Spent--', and a 'Setting:' dropdown menu for '--Select Setting--'; 'Add Referral(s):' with a 'Referred To:' dropdown menu for '--Referral Type--' and a 'Name:' text input field; 'Add Resource(s):' with a 'Type:' dropdown menu for '--Select Type--' and an 'Amount:' text input field with a dollar sign; 'Add Milestone(s):' with a 'Milestone:' dropdown menu for '--Select Milestone--', a 'Date:' dropdown menu for 'Same as Above', and a '+' and '-' button; 'Add To-Do(s):' with a 'To-Do:' text input field and a 'Due Date:' dropdown menu for 'None'; and 'Add Notes:' with a large text area. The right column contains three sections: 'Links' with a list of links including 'Staff List', 'Reports', 'Database Administration', 'Database Support', and 'MA Emergency Shelters', and buttons for 'Edit Your Links' and 'Edit Agency Links'; 'To-Do List' with a checkbox for 'Geneva Wilson: Check about housing offer' and a date '12/11', and buttons for 'Add Program To-Do' and 'View Past To-Dos'; and 'Data Completion Reminders' with a 'View as:' dropdown menu for 'Demo User' and a list of clients with their completion percentages: 'Acadia Koval 95%', 'Kate Burke 75%', 'Gail Garrison 60%', 'Deb Owens 55%', 'Taylor Brown 50%', 'Amiina Jonsdottir 45%', 'Geneva Wilson 43%', 'April McDonald 40%', 'Fred Smith 31%', 'Linda Kenny Logan 30%', 'Basel Wilson 26%', 'Bern Wilson 26%', 'Daniel Sanchez 25%', 'David Owens 25%', 'Matty Reid 21%', 'Juan Carlos Reid 20%', 'Albert Sanchez 20%', 'Charles Sanchez 20%', and 'Meagan Churchill 20%'. An arrow points from the text on the right to the 'Geneva Wilson' link in the 'Data Completion Reminders' list.

Any of a user's active clients, who do not have 100% of their required information filled in, will appear on the Data Completion Reminder.

Clicking on client name opens data entry page with all missing fields highlighted

Once client reaches 100% completion, name is taken off reminder list.

# Data Entry Page

Program Lists | Export to Document | Logged in as Global Admin | --Look-up Client Info--

Navigation: [Homepage](#) | [Multiple Programs](#) | [Ella Koval \(Parent\)](#) | [Acadia Koval \(Basic Info\)](#) | **All Client Data**

Sexual Orientation:   
Other Specified:

### Race / Ethnicity / Language

Primary Race:

Ethnic Identity:

Primary Language:

Language Served:

### Special Needs / Disabilities

First Disability:

Second Disability:

### Income & Benefits

Incomes: (Point in Time)

New Income Entry

Date:

Enter **monthly** income for all fields

Income from Unknown Source:

### Jump to Section

- [Contact Information](#)
- [Move Ins & Move Outs](#)
- [Miscellaneous Demographics](#)
- [Gender / Sexual Orientation](#)
- [Race / Ethnicity / Language](#)
- [Special Needs / Disabilities](#)
- [Income & Benefits](#)
- [Intake Circumstances](#)
- [Incident / Abuser Information](#)
- [Assessment Information](#)
- [Restraining Orders](#)
- [DCF Intake & Exits](#)
- [VOCA Intakes](#)

### Data Completion

95% Complete: [1 Missing](#)

Highlight missing variables

### Save Controls

Click once to save changes.

[Edit Page Structure](#)

Missing information highlighted

Organization can choose which questions are required, and set other questions to show up, or be required, only when certain questions are answered in a certain way.

# Separating Clients by Funder

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## **Problem:**

- Distributing clients across funders based on FTEs gets complicated
- Inevitably leads to strange fractions of people and totals that don't add up to 100%

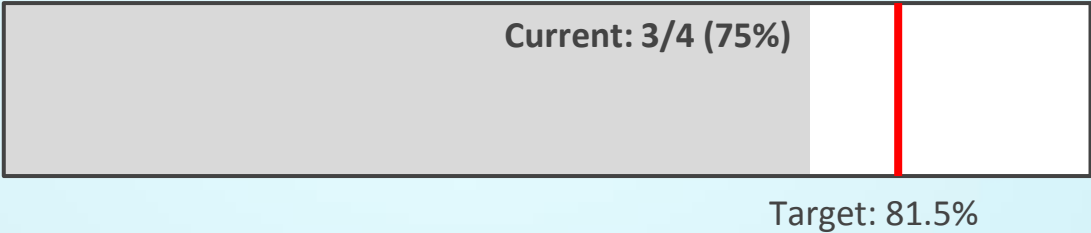
## **Solution:**

- Program into database the rules for how clients should be distributed
- Assign clients to funders when added to system, not when running report
- Give staff the ability to see up-to-date client distribution and override database's decision if needed
- Can change distribution rules in system if needed

# Separating Clients by Funder

- The 'Add New Client' page looks up current distribution of clients across funders
- Current and target distribution levels are shown (diagram below)
- Database makes decision about which funder should be assigned to get percentages closer to target
- User is informed of decision and has opportunity to override

**Funder A  
Distribution:**



**Funder B  
Distribution:**



**Client Should be Added to "Funder A"**

# Previewing Data Before Running Final Report

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## **Problem:**

- Any database's out-of-the-box query tools won't be sufficient when taking into account a funder's complicated rules and conversions
- Custom built reporting pages don't allow for admin staff to review information before it gets turned into funder defined format

## **Solution:**

- Build a custom report with data preview page
- Preview screen can verify all data has been entered, show entries that could pose potential problems, or suggest un-assigned clients that meet the funder's criteria be added to report



# Data Preview Page

Program Lists | Logged in as Global Admin | --Look-up Client Info--

Navigation: [Homepage](#) | [Reports](#) | [VOCA Statistical Report](#) | 1st Quarter, 2014

### VOCA Statistical Report - 1st Quarter, 2014

#### 4 New Clients

The following Clients have VOCA Point in Time entries created for them during the selected quarter and will be reported as new.

Client Name	Completion	PV/SO	Face to Face / Phone	Services Provided	Referred To
<a href="#">Jennifer Prejektorinski</a>	<a href="#">100%</a>	PV	Phone	Personal Advocacy	
<a href="#">John Michales</a>	<a href="#">100%</a>	PV	Face to Face	Counseling Group Treatment/Support	Community Organizations
<a href="#">Layla Vega</a>	<a href="#">87%</a>	PV	Face to Face	Personal Advocacy	
<a href="#">Othena Omather</a>	<a href="#">100%</a>	PV	Face to Face	Counseling	

#### 2 Ongoing Clients

Full Name	PV/SO	Face to Face / Phone	Services Provided	Referred To
<a href="#">Amanda Sanchez</a>	SO	Face to Face	Information and Referral (in-person) Personal Advocacy Emergency Financial Assistance	Legal Services
<a href="#">Linda Tedd</a>	SO	Face to Face	Group Treatment/Support	

#### 7 Not Included in Report

The following Clients were served by VOCA funded staff, but do not have VOCA intakes associated with them. If they should be included in this quarter's report, you must create a VOCA intake for them.

Client/Child	Date Initial Contact
<a href="#">Acadia Koval</a>	May 6th, 2014
<a href="#">Deb Owens</a>	Dec 1st, 2011
<a href="#">Ella Koval</a>	Mar 3rd, 2011

Clients with missing information must be at 100% in order for final report to be generated

Crucial bits of information shown to give administrator chance to notice glaring mistakes

Clients that qualify for the grant but were not assigned to this funder (potentially by staff error) have an opportunity to be added before continuing.

# Final Generated Report

Final .docx, .xlsx, or .pdf file generated with all numbers automatically filled in.

## SECTION 1: TOTAL PRIMARY VICTIMS AND SIGNIFICANT OTHERS SERVED

### A. NEW CLIENTS SERVED THIS QUARTER

Type of Client	Number of Primary Victims	Number of Significant Others
1. New FACE-TO-FACE Clients	3	
2. New HOTLINE/TELEPHONE Clients	1	
<b>Total of 1 + 2</b>	<b>4</b>	<b>0</b>

<b>TOTAL A = ( New Primary Victims + New Significant Others)</b>	<b>4</b>
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### B. ONGOING CLIENTS SERVED THIS QUARTER

Type of Client	Number of Primary Victims	Number of Significant Others
3. Ongoing FACE-TO-FACE Clients		2

# Submitting Data to Parent Organizations

**Same principles as described for distributing data to funders can be used to submit data to parent organizations:**

- DV program and parent organization come to an agreement on data to be submitted
- Variable's master lists are expanded to include parent organization's criteria (where needed)
- Data completion reminders prompt staff to fill in information ahead of time
- A custom reporting page is built to automatically export the data into the format the parent organization requests

# Database Development Costs

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## **Problem:**

- Database development costs can escalate quickly
- May be infeasible for a single program to fund the costs of all this customization

## **Solution:**

- Share the cost of development with similar organizations via a formal, or informal, coalition
- Not all organizations must agree on variable options, which clients qualify, how certain questions are interpreted, etc... Differences can be built right into the system.