ABOUT ACCESS & THE P-CAP DATABASE

Access is a database program. It has two primary functions:

1.   To design databases;
2.   To use existing databases to organize and present information.

You will only be using Access for the second purpose, to use the existing P-CAP client database to organize and present client demographic information. This information is only about client demographics – where the clients live, who their contact people are, etc. The research information which P-CAP gathers is kept at FADU and uses an entirely different set of databases. The information kept in the P-CAP client database comes from the ASI intake form and from the advocates.

Access is a Microsoft product and makes use of pull-down menus, buttons and toolbars.

The toolbars at the top of the screen change depending upon what you have open. If you hold the mouse arrow over a button on the toolbar, a label will pop up to let you know what the button does.

Access has four components which make up the database.

TABLES

First are the tables, which is where the data is stored. The tables are made up of fields, in each of which certain data is stored. Each client who is entered into the database creates a record, which is a unique set of data. (See box below on what "Unique" means). So, each record within the database has the same fields as the other records, but those fields are filled with the data which belongs to that record alone.

FORMS

Now, the tables are large, unwieldy, and ugly. So, in order to have an easier time putting the data into the tables (a process called data entry), you use forms. Forms only exist on the computer screen, but they help make data entry and editing the data much easier. Information entered into the forms is put into the tables, where it is kept until we want to use it again. When you need to edit or change information in the tables, **you will use the forms to do so**. We have two main forms- the 'mombaby' form and the 'contacts' form.

REPORTS

When we want to print out data which is in the tables, we produce reports. Reports give us the information we need (which is usually not all the information contained in the tables) and in a format which makes that information useful and legible. You can create reports, but this is a complicated process which can eat a lot of time. Therefore, it is best to use the pre-formatted reports available in this database whenever possible.

QUERIES

A query is the tool we use to process and organize the information in the tables which we want in the reports. Think of a query as a sophisticated coin sorter. When you want to run a report, Access takes all the data from the tables and dumps it into the query. The query has been pre- programmed to sort through that data, pull out what we want, and, if needed, manipulate that data in order to do things like generate dates or make special clusters of data. One example of a cluster of data is the combination of the name fields to produce someone's full name. The queries are pre-formatted for you and already know what data goes into what reports.

ON THE MEANING OF "UNIQUE" IN THE LAND OF DATABASES

A database program needs to be able to give each record (a set of data) a unique name. "Unique" means that one and only one record in that database will have that name. For example, P-CAP numbers are unique - no two clients share the same number.

DATA ENTRY AND THE ENTRY FORMS

Data entry uses two data entry forms. The two forms are:

1. Mom/baby entry form, which is tied to the mombaby table;
2. Contacts data entry form, which is tied to the contacts table.

These forms are designed to make data entry as easy as possible. Think of the forms as a template into which you empty the data. This template then sorts the information into the right place in the table for you. The data does not stay in the form, but is stored in the table tied to the form. When you open the form, it shows you the data available in the table and allows you to change that data. This is the way you should edit the table data, using the entry form rather than going into the table itself.

CAUTION: **Access saves as you go**. It's not like a Word document where you have to tell it to 'save' when you're done. When you empty a 'field' in a form to replace the information, it's going to stay empty until you fill it in. Also, the curser will always stay in the the same field from record to record. For example, if you are adding the TC DOB on client # 2001 and then change page to the next record, the curser will show up in TC DOB. Please double check that you are on the client you mean to be before changing a field or leaving a form.

It is important to be very consistent when doing data entry. There is a "hints" field at the bottom of the screen which tells you when a field has specific requirements. As you tab from field to field, this text will change. If there is no text there, the field is self-explanatory.

If you do not have information to fill in a field, do not type anything in that field. Leave it empty. The database is programmed to understand that a blank space means there is no information, so there is no need to type in "n/a" or other filler phrases. ·Using them will actually lead to mistakes when running reports, so please don't use them.

RULES FOR USING THE ENTRY FORMS:

1) Use the tab key to move from field to field.
2) Make use of the "hints" field to keep entry consistent.
3) Use leading zeros, i.e. 01/03/99
4) Enter area codes for all phone numbers.
5) Do not use the all caps key for data entry.
6) Please enter addresses fully. (See "address entry guidelines" box below).
7) If a field lacks data, leave it blank. DO NOT enter "N/A" or other information.
8) Tab past fields for which you do not have information. Leave them blank.
9) Leave the status field empty unless you are using one of the approved codes to sort data.
10) The database is designed to gather and hold more information than is initially collected on the ASI. Do not be alarmed that the ASI does not provide all the information listed in the database. Tab past fields you cannot answer.
11) Relationships in the database all stem from the person's relationship to the parents of the target baby. Use the relationship code guidelines (see "relationship code guidelines" box below).
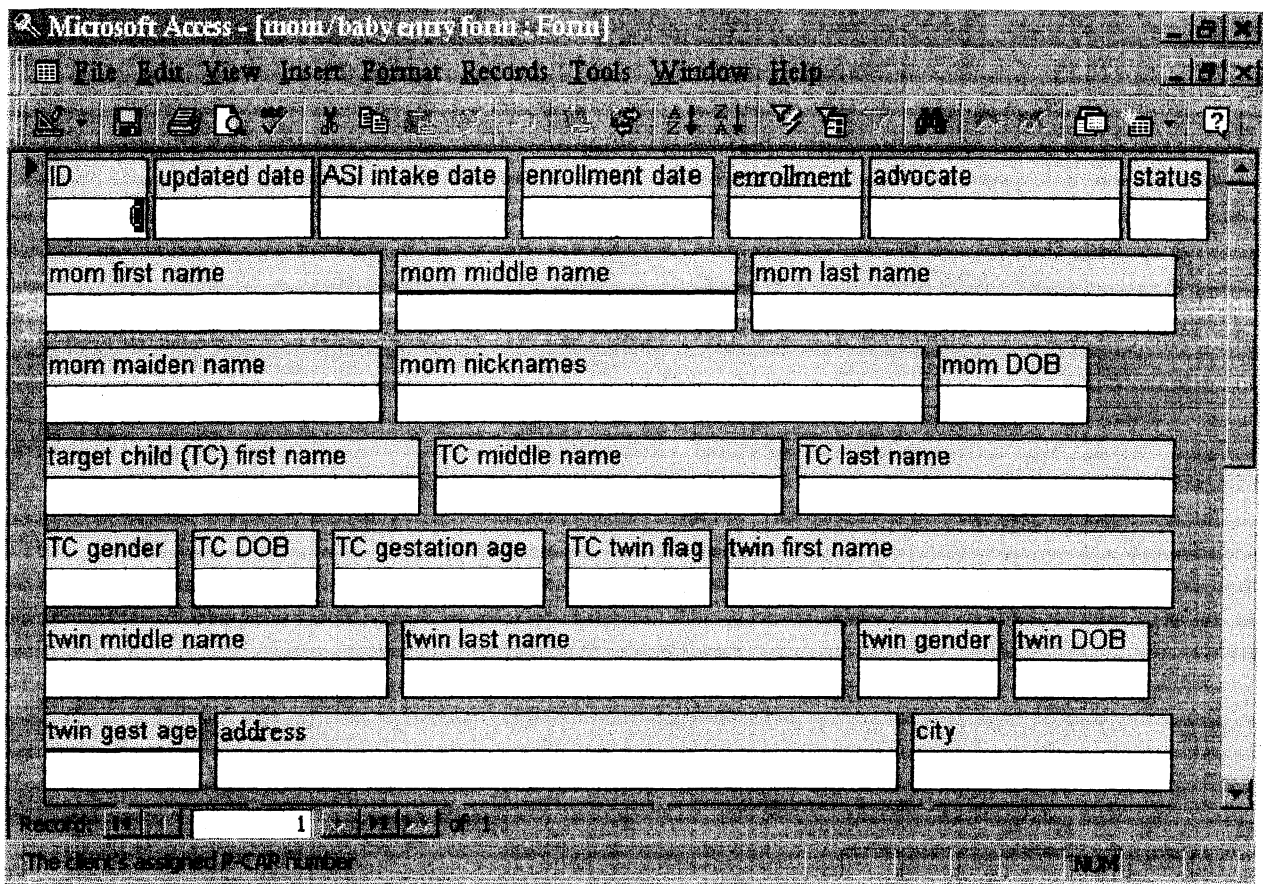
fig. 3.1　　　　What the mom/baby entry form looks like

What the fields mean: (fields typed in bold below must be filled in for database to function)

MOMBABY FIELD NAMES

ID ....　　**Client's unique ID number, assigned by clinical supervisor**

Updated..............　　The first time you enter a record, put the current date in this field. **When you subsequently update the record, change this to the current date on which you are entering the change.** This date should reflect the date of the most recent changes to the record.

ASI intake date........　　Date on which the ASI intake interview took place.

Enrollment date........　　Date the consent form was signed.

Enrollment.......　　Enter 'e' for a regular enrollment. For SBSM transfers you may leave blank or enter 'SBSM.' The 'e' is what tells the 'face sheet' report to generate the data due dates based on the enrollment date. Otherwise it will be based on the TC DOB.

Advocate ....　　Advocate's full name. DO NOT enter advocate's number here. The database is programmed to recognize only the advocate's full name.

Status...................　　Leave blank unless using one of the special codes (see "use of status field" box (below)

August 2012

Mom first name …... First name of client

Mom middle name ...   Middle name of client. If multiple names, list in order without punctuation.

Mom last name......   Last name of client. If multiple names, list in order without punctuation.

Mom maiden name...   Maiden name of client, only if different than current last name. Leave   blank if client's current name is her maiden name.

Mom nicknames …....   If multiple names, list in order with commas between the names, i.e. Tiny, Marla, Tennessee

Mom DOB ....   Client's birthday.

Target child first name ......   First name of target child.

Target child middle name......   Middle name of target child. If multiple names, list in order without punctuation.

Target child last name.......   Last name of child. If multiple, list in order without punctuation.

Target child gender ....   Enter "m" for male and **"f"** for female.

Target child DOB ....   Target child's birthday.

Target child gestation age ....   Type in number, followed by word "weeks", i.e. 39 weeks

Twin flag ....   Enter "t" if target child is twins. Otherwise, leave blank.

Twin first name ......   First name of target twin. Use only if target child is twins. Otherwise, leave blank.

Twin middle name.......   Middle name of target twin. If multiple names, list in order without punctuation. Use only if target child is twins. Otherwise, leave blank.

Twin last name ....   Last name of target twin. If multiple names, list in order without punctuation. Use only if target child is twins. Otherwise, leave blank.

Twin DOB ....   Target twin's birthday. Use only if target child is twins. Otherwise, leave blank.

Twin gender...............   Enter "m" for male and **"f"** for female. Use only if target child is twins. Otherwise, leave blank.

Twin gest age ....   Type in number, followed by word "weeks", i.e. 39 weeks. Use only if target child is twins. Otherwise, leave blank.

Address ......   Client's current address. Enter addresses fully, as in: 9999 S.W. 58th Street; 1414 Brown Place N.E.; 38888 160th Avenue W., Apt. A-103.

City ....   City of client's address. Spell out completely

State.............   Use standard two letter US Postal Service state abbreviations, i.e. WA, OR, etc.

Zip ....   Client's zip code. Can be five (XXXXX) or nine (XXXXX-XXX:X) digit codes. Use a hyphen for nine digit codes.

Home phone......   Client's home number. Include area code. Program automatically formats this for you.

Work phone.............   Client's work number. Include area code. Program automatically formats this for you.

|	
Mom PIC.............	The PIC number is the number on the medical coupon. Be sure to include the last alpha letter - without it the number is useless.
Target child PIC.........	See mom PIC above.
Twin PIC..........	See mom PIC above.
DSHS...............	Any case number associated with the client.
Natal hospital..........	Hospital where target child was born.
FOB first name......	First name of father of target baby.
FOB middle name...	Middle name of father of target baby. If multiple names, list in order without punctuation.
FOB last name.....	Last name of father of target baby. If multiple names, list in order without punctuation. List Jr., Sr., following last name.
FOB DOB.............	Father of target child's birthday.
FOB address..........	Current address for father of target child. Use address entry guidelines. (see address above)
FOB city................	City of father of target child's current address. Spell out completely.
FOB state............	Use standard two letter US Postal Service state abbreviations, i.e. WA, OR, etc.
FOB zip...............	Father of target child's zip code. Can be five (XXXXX) or nine (XXXXX-XX:XX) digit codes. Use a hyphen for nine digit codes.
FOB home phone......	Father of target child's horne number. Include area code. Program automatically formats this for you.
FOB work phone.....	Father of target child's work number. Include area code. Program automatically formats this for you.
Target child caretaker name.......	Name of person with whom the target child is currently living.
Caretaker relationship.................	Use the relationship code guidelines (below) to indicate relationship to client and target child. If caregiver is client, enter "MOB".
Caretaker address.........	Address of person with whom target child is currently living. Leave blank if caregiver is MOB. Enter address in all other cases.
Caretaker city.............	City of caretaker's current address. Spell out completely.
Caretaker state.........	Use standard two letter US Postal Service state abbreviations, i.e. WA, OR, etc.
Caretaker zip...........	Caretaker's zip code. Can be five (XX:XXX) or nine (XX:XXX-XXXX) digit codes. Use a hyphen for nine digit codes.
Caretaker phone....	Caregiver's home number. Include area code. Program automatically formats this for you.
mb comments........	Use this field to capture any information which does not have a specific field in the database. If you are not sure where information goes, put it here. This can include information such as pager numbers, information about FOB incarceration, and work number for caretaker.
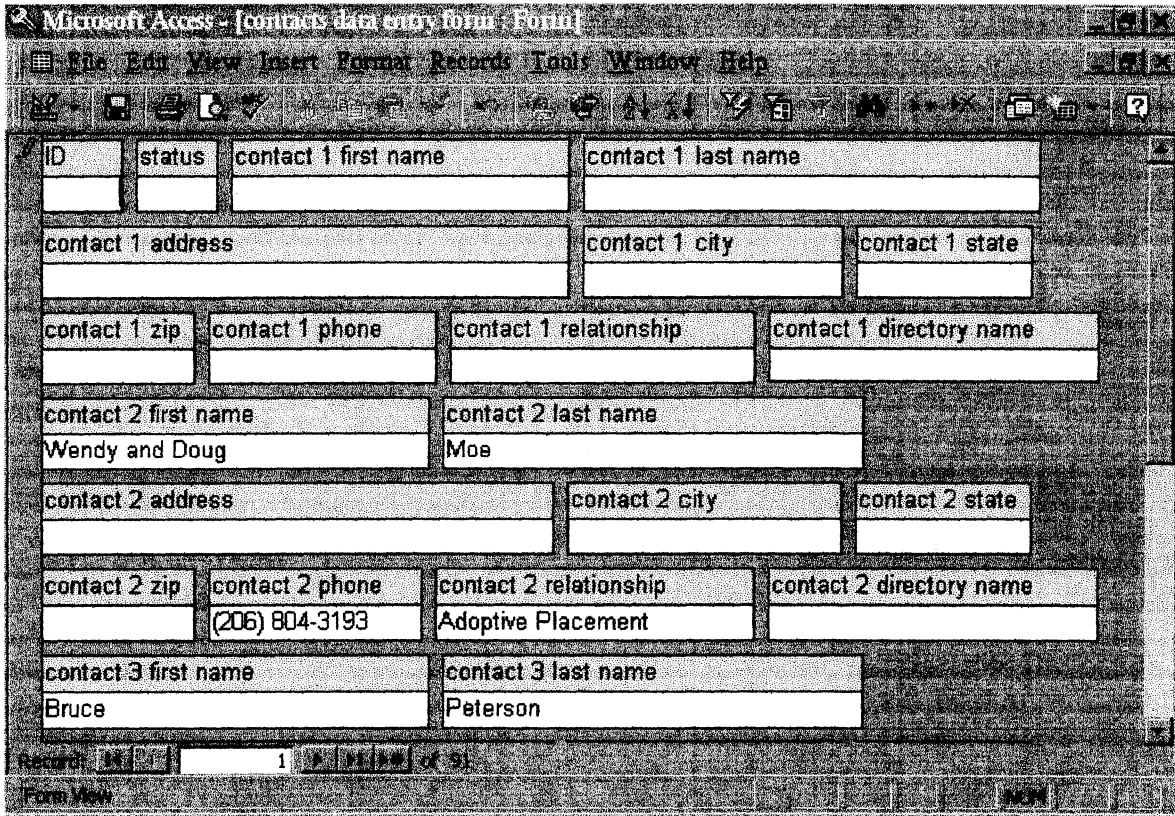
Fig 3.2 What the contacts data entry form looks like

CONTACTS

Note: Even if you have no contacts information for the client, you must enter a record for each ID number in this table. **It** is OK to have a contacts record which is **empty except for the client ID numbe**r. Without a record entered in both the mombaby table and the contacts table, the report will not run for that client.

ID .... Client's assigned P-CAP number.

Status ..... Leave blank unless using one of the special codes (see box above)

Contact1 first name....... First name of contact. If one contact is more than one person (married couple, for example), enter "X:XXX and AAAA" here.

contact I last name... Last name of contact. Enter Jr., Sr., etc. after last name.

contact I address .... Current address. Use address entry guidelines.

contact 1 city .... City of current address. Spell out completely. contact

1 state......................... Use standard two letter US Postal Service state abbreviations, i.e. WA, OR, etc.

contact 1 zip .... Contact's zip code. Can be five (XXXXX) or nine (XXXXX-XXXX) digit codes. Use a hyphen for nine digit codes.

contact 1 phone .... Contact's home or work number. Include area code. Program automatically formats this for you. Note in comments if this is a work number − "Contact 1 phone=work #"

contact 1 relationship ..... Use the relationship code guidelines to indicate relationship to client.

contact 1 directory name...... If contact is listed under a different name in the phone book, enter that name here. If they are not listed under a different name, leave this blank.

contact 2 ,contact 3, contact 4....... Same field definitions as for contact 1

August 2012

contact comments ......   Use this field to capture any information which does not have a specificfield above. This information should be limited to how to contact any of the contact people, such as workplace name, cell phone, pager, etc.

RELATIONSHIP CODE GUIDELINES

Relationships in the database all stem from the person's relationship to the parents of the target baby. All maternal relatives and friends are related to the MOB and all paternal relatives and friends are related to the FOB. Examples:

Mother of baby=M OB
Father of baby= FOB
Target baby's maternal grandmother = MOB mother
Client's grandmother= MOB grandmother
Target baby's paternal aunt = FOB sister
Target baby's paternal great uncle = FOB uncle
Friend of client = MOB friend
Client's treatment case manager= MOB case manager

ADDRESS ENTRY GUIDELINES

All addresses should be entered fully. You can use the following abbreviations:

Ave. – avenue	Blvd. - boulevard	Ct.- court	Ter - terrace
St. -street	Cir-circle	Hwy- highway	Sq.- square
Apt. – apartment			

Spell out: Lane, Loop, Road, Park, Point, Walk, Way

Examples:
9999 S.W. 58th Lane   1414 Brown Pl. N.E.
38888 l60th Ave. W., Apt. A-103   3412 160th Ct. S., Apt. 3

USE OF THE STATUS FIELD

The status field is a flag field. Flag fields are used to mark individual records in the database with a one-letter code. Then you can sort for these records. You will use this feature when you are about to run an apend query (see query section) to move records from one table to another. There is also one report, the Missing Clients report, which uses this field.

When not in use for a specific flag, the status field should be empty. Don't use this field to track missing clients, since this information changes all the time. Instead, use the "m" code only to designate which records should be showing up on the Missing Clients report. (This report is not used to track the clients, but to report which clients are missing on a given date.)

The codes which can be used are:

    g   for graduated clients or contacts afor address changes
    m   for the Missing Clients report

Note: codes should be entered in lower case

HELPFUL HINT: ALWAYS LOOK AT THE NUMBER OF RECORDS!! MOMBABY FORM AND CONTACTS SHOULD BE EQUAL. IF THEY AREN'T SOMETHING IS WRONG!

POSSIBLE PROBLEMS:
- THERE ISN'T A CONTACT FORM TO MATCH A MOMBABY FORM.
- A GRADUATED CLIENT WAS NOT REMOVED FROM ONE OF THE TABLES.
  - Look for a 'g' in the status column. Double check that the ID # is on the corresponding graduated table, then delete the record from the table with current clients.

REPORTS

A report is a template into which the database places the information from the table and then prints it out. It is a way of presenting the information in the clearest and most useful manner. Access keeps the report templates on file, but the information is kept in the tables and is put into the report template each time the report is run. This way, changes are made to the data in the tables using the forms and will always show up in the latest version of any report.

The reports which have already been designed will meet your needs almost all the time. You should judge a report by whether or not it contains **at least** the information you need. It may contain more information than that. However, creating new reports takes a fair amount of skill and time (and is not covered in this manual), so you should try to use the existing reports whenever possible.
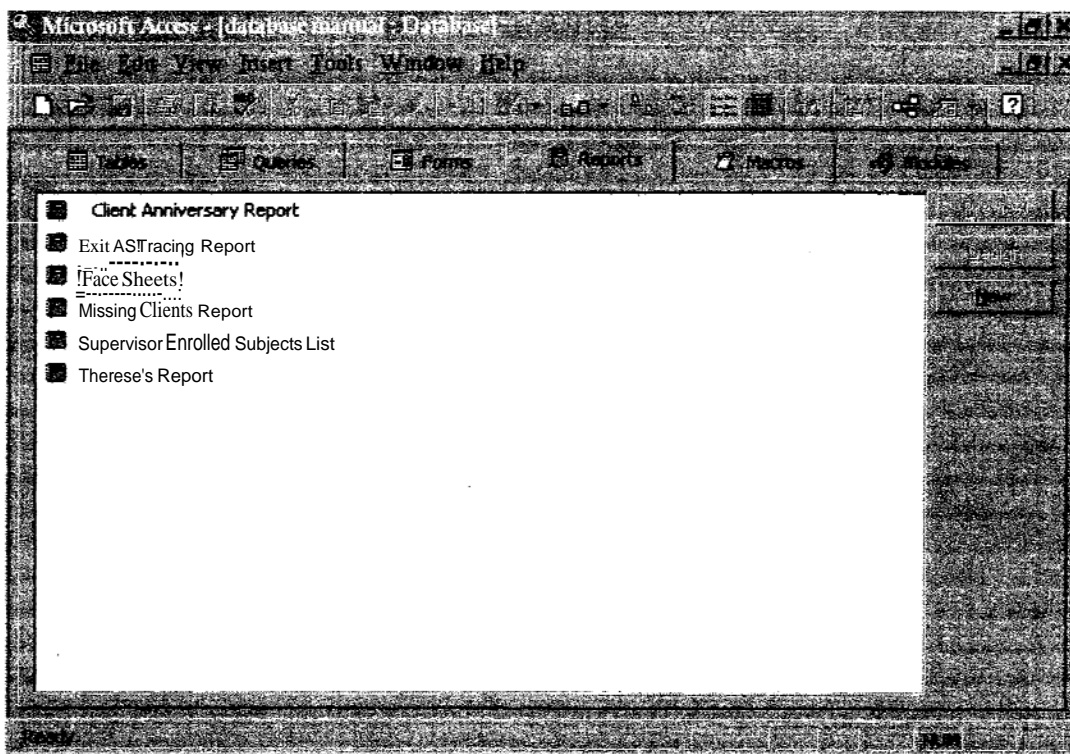
Figure *5.0*   What the Reports tab looks like

To run an existing report, select the report name on the report tab and hit the "Preview" button on the right of the tab. This will generate the report. You can then print the report.

Note: For the "Missing Clients Report", you will need to have flagged the records you wish to include in this report. This is done by going into the mom/baby entry form and putting "m" in the status field for each of those records. If you have not done this, you will either get no records in the report, or the wrong records.

QUERIES:

Most of the time, you don't need to do anything with the queries. When you run a report, the program automatically does what needs to be done with queries behind the scenes, as it were.

However, there is one task which you will be doing which uses the queries. That task is using what is called an "append query" to move data from one table to another. This happens in only one circumstance: When you graduate or false enroll a client.

We use this to move the graduated clients' records into a different table so that the mombaby and contacts tables only contain information about our current clients. If we did not do this, we would have graduated clients showing up as current clients and our reports wouldn't help.
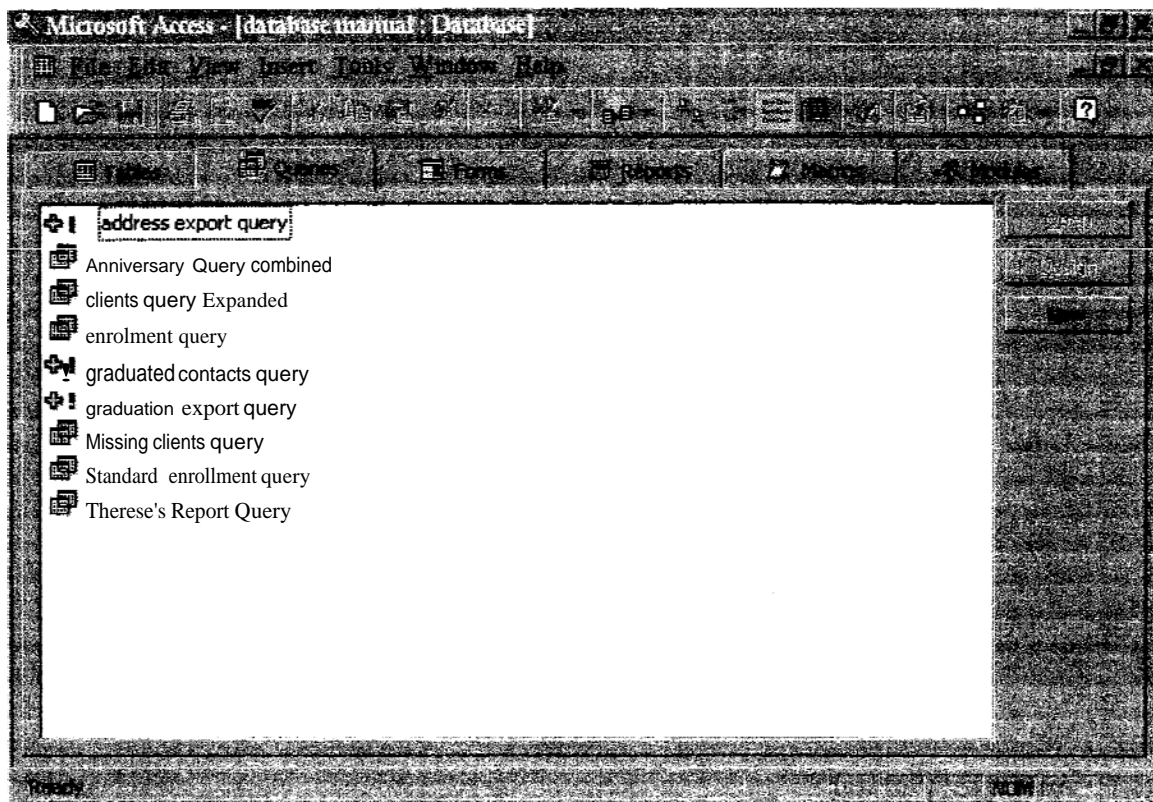

Fig. 6.0   What the Queries tab looks like

How to 'graduate' clients:

1. First, go to the mom/baby entry form and enter "g" into the status field (figure 6.1) for each record you wish to backup to the old addresses table. Keep count of how many records you will be appending.

2. Go to the contacts entry form and enter "g" into the status field for each record for the graduated clients' contacts.

3.. Close the form and go to the Queries tab.

4. At the top of the window you will see 'Security Warning….'' and a button 'options.' Click on that and choose 'enable this content' and hit OK

5. We will do the client records from the mom/baby table first. Select the "graduation export query" (figure 6.8). 4. Double click on it. A box will appear telling you are about to amend a data table. Hit the "open" button to the right on the Queries tab. Click on 'yes.' Another box will appear telling you how many records you are going to amend. If that number is not what you expect then stop. Otherwise, hit 'yes.'

   If the number does not match, hit the "no" button and go back to the mom/baby entry form and review your records to find the inconsistency. Then start again at step2 above.

6. Once you hit the "yes" button, the box will vanish and you will have no further indication that anything has happened. In order to confirm that you did indeed copy these records into the "graduated clients" table, go to the tables tab, select the "graduated clients" table (figure 6.9),and hit the "open button to the right on the tab.
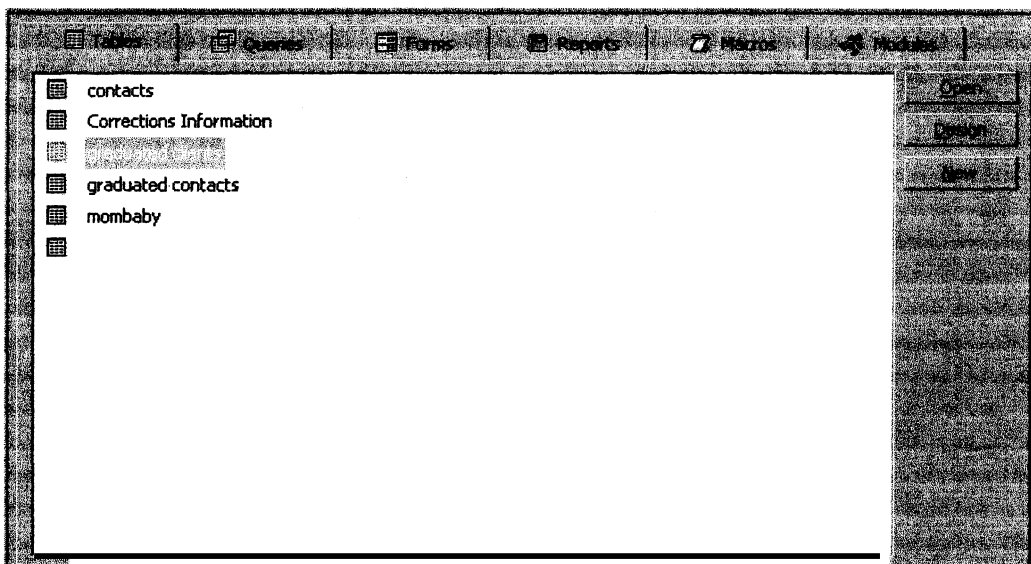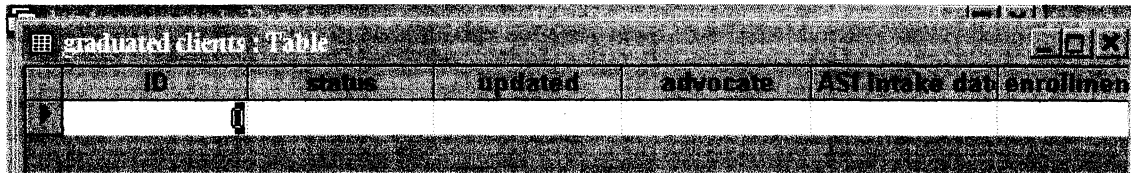

Fig 6.9 The tables tab

7. Once in the table, use the ID field to confirm that the records you intended to copy are in fact there. (figure 6.10). You want to make sure these records are here because we will be deleting them from the 'mombaby' and 'contacts' tables when we are done.

Fig. 6.10

8. Now we need to repeat the process for the graduated contacts. Return to step 3 and repeat, only select the "graduated contacts" query instead.

9. Check these records by selecting the "graduated contacts" table and confirming the records have been copied there.

10. Now we need to delete these records from the mombaby table and the contacts table. Open the mombaby entry form. Using the record selection buttons, go to the first record to be deleted. Then use the pull-down Edit menu and select "Delete Record" (figure6.11) Select that. (or right click on the mouse and choose 'delete record.')

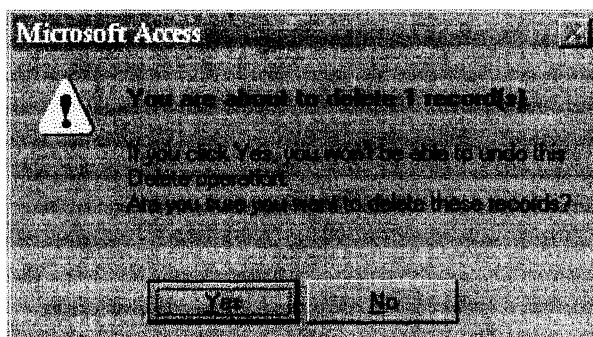11. A box will appear (figure 6.12). Hit the "yes" button.

Fig. 6.12   The delete box

12. Repeat the process for each record you appended. Then go to the contacts table and repeat steps 10 and 11 above until the corresponding contacts records for the graduated clients are all deleted. You are done!

HELPFUL HINT: THE NUMBER OF RECORDS ON THE 'GRADUATED CLIENTS' TABLE AND THE 'GRADUATED CONTACTS' TABLE SHOULD BE EQUAL. IF THEY AREN'T SOMETHING IS WRONG!

Possible problems:
• Forgot to remove a previously graduated client from either or both of

mombaby and 'contacts' table, so when you ran the query, it duplicated onto the graduated table. Look for duplicate ID# on the table.

   - The 'mombaby' and 'graduated' clients table will put the records in order of the ID#s. The 'contacts' and 'graduated contacts' tables put the records in order of creation…. You can 'reorder' them at the top of the column.   If you do that, it will ask you, when you close the table, if you want to save changes to the design. SAY NO.