

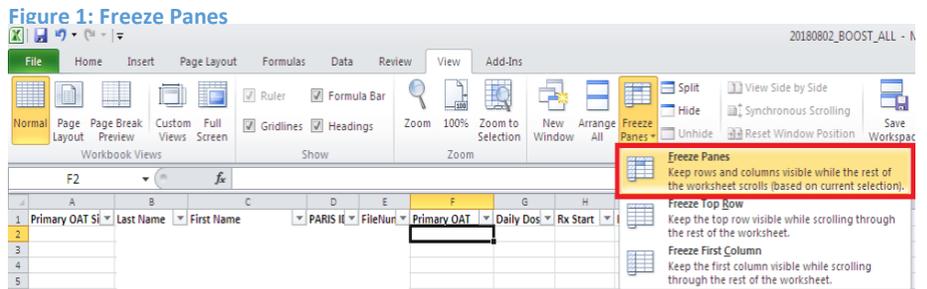
# BOOST Weekly Reporting Excel Steps: How to Obtain Your Data

These steps provide an overview of how to identify, and obtain counts for the number of clients at your primary opiate agonist therapy (OAT) site, number of active OAT prescriptions at your site, number of clients with a prescription that expired in the past week, number of clients with a most recent start date entered (MRSD), and number of clients retained on therapy for 30 days and 90 days. These steps also help you identify and quantify the number of patients on optimal dosages for methadone and kadian as well as the number of patients who have received take home naloxone (THN) training.

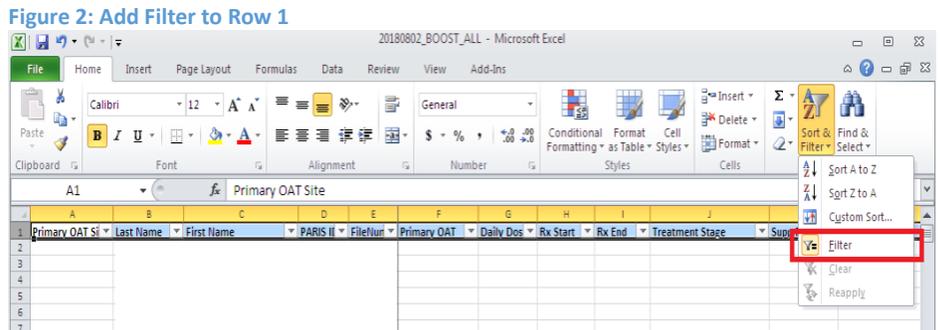
## Setting up your spreadsheet

**Freeze Panes:** To improve ease of viewing data column headings and row identifiers (i.e. patient name and FileNum etc.), we suggest freezing view panes so that you can always see the patient names and column headings when scrolling through the data. This can be done by select the most top-left cell that you want in your scrolling area. We use cell F2. Then go to View > Freeze Panes > Left click Freeze Panes

as indicated in Figure 1. You may notice that all Names, PARIS ID and FileNum cells have been cut from the images to remove identifying information. These columns should be populated in your spreadsheet.



**Add Filter to Row 1:** Select the top row by left clicking the 1 of row 1. This should be located at the top left of your spreadsheet. Add filters to row 1 by going to Home > Sort & Filter and left click on Filter, shown in Figure 2.



## Number of clients at each primary OAT site

**Filter by Primary OAT Site:** To filter for clients whose Primary OAT site is your site, select the dropdown arrow of the Primary OAT Site column. This should be column A. You can either type in the 3-letter code for your site or de-select the OAT sites that you are not interested in so that only your OAT site is checked. After selecting your site, press OK or the enter key.

For example, as seen in Figure 3, if I wanted to look up all patients with primary OAT site as Raven Song, I would type “RSG” into the search filter and press enter to be left with only these patients shown on my spreadsheet.

Now, only clients with the selected Primary OAT site will be shown in your spreadsheet. After this action has been completed you should also notice a filter symbol and dropdown arrow in the box previously containing only the dropdown arrow. This symbol will let you know which columns you are currently filtering as shown in Figure 4.

**Identifying the Count:** At the bottom left corner of excel, you will now see the number of clients with the selected Primary OAT Site by the number of records found. These clients are the population of focus for the selected Primary OAT Site. You may also count by the number of non-null cells by left-clicking the top cell and dragging over all the cells you are interested in. In this case I have dragged over all the RSG cells. This can be useful for counting a subset, if needed. In Figure 5 the count seen in count and number of records found are the same, confirming the number of Clients in Primary OAT Site for RSG is 170. Enter the number of clients at your OAT site in the Clients in Primary OAT site row of your excel BOOST data tracker

Figure 3: Filtering by Primary OAT Site

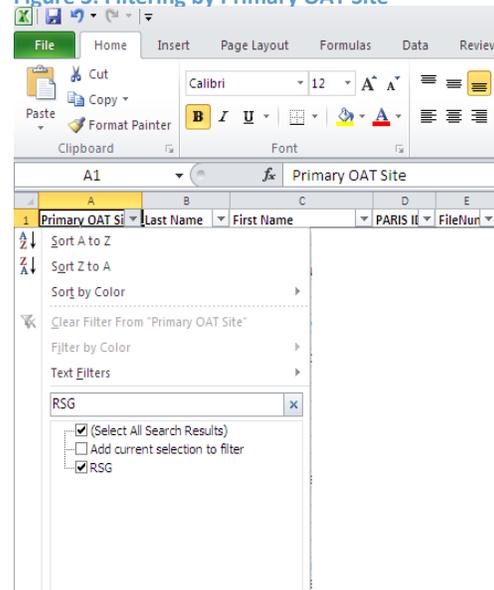


Figure 4: Filtered by Primary OAT Site

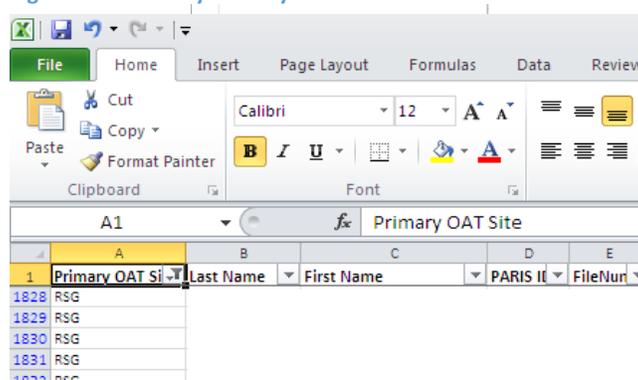


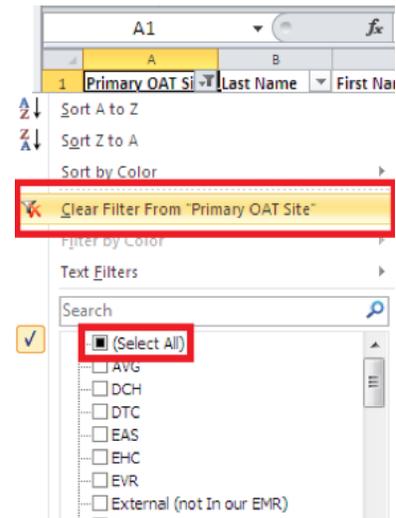
Figure 5: Count of Clients in Primary OAT Site

	A	B	C	D	E	F	G	H	I	J	K
1	Primary OAT Site	Last Name	First Name	PARIS ID	FileNum	Primary OAT	Daily Dos.	Rx Start	Rx End	Treatment Stage	Supp Rx Dat
1978	RSG					Methadone	110	2-Aug-18	23-Aug-18	Dose unchanged	
1979	RSG					Suboxone (bup/nal)	7	27-Jul-18	23-Aug-18	Dose unchanged	
1980	RSG					Kadian (SR0M)	940	28-Jul-18	24-Aug-18	Dose increase	
1981	RSG					Suboxone (bup/nal)	22	27-Jul-18	24-Aug-18	Dose unchanged	
1982	RSG					Suboxone (bup/nal)	16	28-Jul-18	24-Aug-18	Dose unchanged	
1983	RSG					Suboxone (bup/nal)	16	31-Jul-18	27-Aug-18	Dose unchanged	
1984	RSG					Methadone	50	17-Jul-18	27-Aug-18	Dose unchanged	
1985	RSG					Kadian (SR0M)	1050	24-Jul-18	27-Aug-18	Dose unchanged	
1986	RSG					Suboxone (bup/nal)	12	31-Jul-18	28-Aug-18	Dose unchanged	
1987	RSG					Methadone	50	11-Jul-18	29-Aug-18	Dose unchanged	
1988	RSG					Methadone	80	11-Jul-18	4-Sep-18	Dose unchanged	
1989	RSG					Suboxone (bup/nal)	6	1-Aug-18	5-Sep-18	Dose decrease - self-imposed	
1990	RSG					Suboxone (bup/nal)	20	2-Aug-18	5-Sep-18	Dose unchanged	
1991	RSG					Suboxone (bup/nal)	6	27-Jul-18	6-Sep-18	Dose increase	
1992	RSG					Methadone	110	24-Jul-18	6-Sep-18	Dose increase	
1993	RSG					Methadone	140	31-Jul-18	6-Sep-18	Dose increase	
1994	RSG					Methadone	160	2-Aug-18	11-Sep-18	Dose unchanged	
1995	RSG					Kadian (SR0M)	80	21-Jul-18	14-Sep-18	Dose increase	
1996	RSG					Kadian (SR0M)	30	7-Aug-18	17-Sep-18	Dose unchanged	
1997	RSG					Methadone	185	27-Jul-18	20-Sep-18	Dose unchanged	

## Clearing Filters

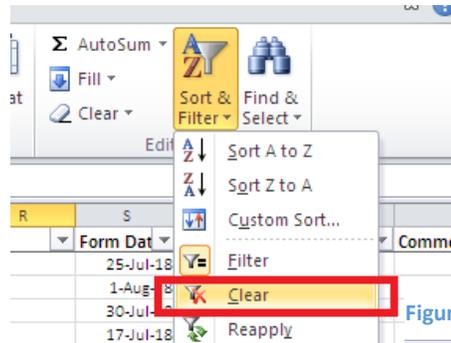
**Removing Filters:** To reverse the filter you have added, reselect the cell you are filtering by in column A with the dropdown arrow and click “Clear Filter from Primary OAT Site”. You may also check the box “Select all” beneath the search area and press OK or the enter key as shown in Figure 6.

Figure 6: Clear a Filter



**Removing all Filters:** If you have many filters in place and want to clear them all at the same time, you can select Home > Sort & Filter > Clear, shown below in Figure 7.

Figure 7: Clear All Filters



## Number of clients with active OAT prescription

**Filter for Active OAT Rx:** We will identify all the patients with an active prescription using the Rx End column. This column indicates the end date of each client’s prescription. The data query extracts up to the end of the previous day. Thus, clients with a prescription ending the day before the extract date and after are considered clients with active prescriptions.

Figure 8: Filter for Active OAT Rx

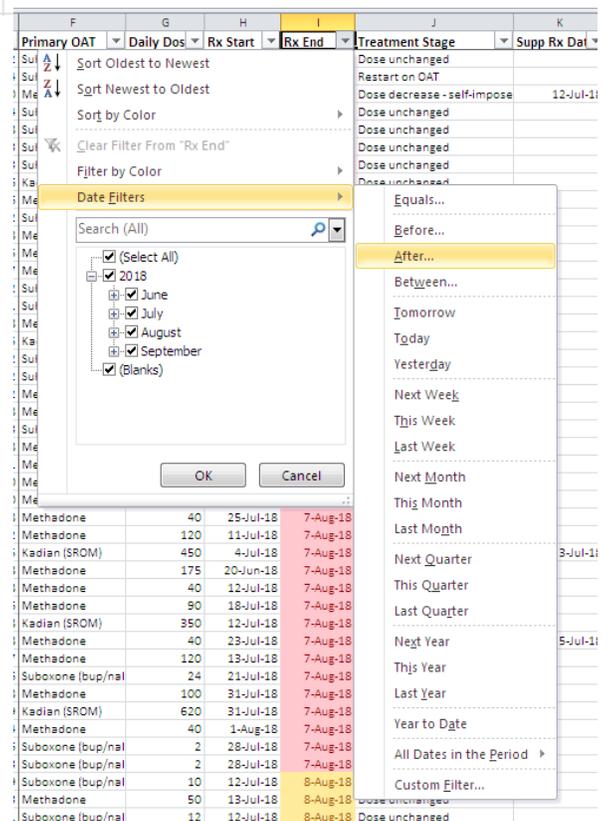
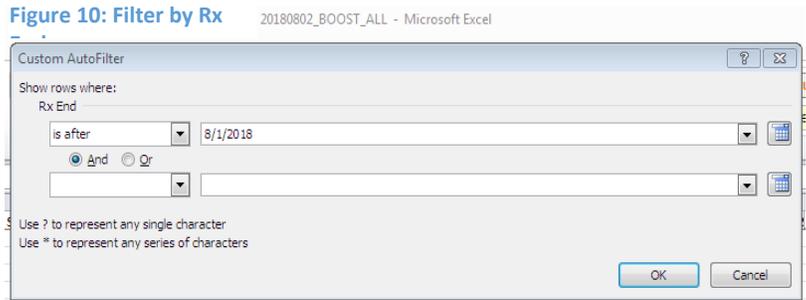


Figure 8 is an example on how to obtain this data by selecting the dropdown arrow for the Rx End column > Date Filters > After...

Ensure “is after” is selected in the first drop down, then enter the date one day before the date of the query as shown in Figure 9. This is because the query is based on all data from the end of the previous day. In our case, the query is from August 2, 2018. So, we have selected August 1, 2018 for our “is after” date. This will then filter for only clients who have a prescription that ends on the day of the extract or afterwards. The clients that have now been filtered for are the clients with active prescriptions at the time of the query. This filter can also be used to identify patients who will have a prescription expiring in the coming week.

**Count for Active OAT Rx:** The count of the number of clients with an active prescription by selecting the top Rx End Date and dragging that selection box to the last entry and noting the Count number towards the bottom right of the spreadsheet, or by noticing the number of records found in the bottom left. This will be in the same location as described in Figure 5. Enter the number of active clients on your BOOST data tracker spreadsheet.



### Number of clients with OAT prescription expired <1 week

#### Filter for clients with recently expired prescription <1wk:

To identify the clients with a prescription that expired in the last week, you can alter the Rx End date filter criteria to the range a week prior to the query date by selecting Date Filter > Between... as shown in Figure 10.

In the box after “is after or equal to” enter the date 1 week before the extract date. Ensure “And” is selected underneath the dropdown and enter the date of the query into the date following “is before or equal to”.

Figure 9: Filter for Clients with Rx Expired <1wk

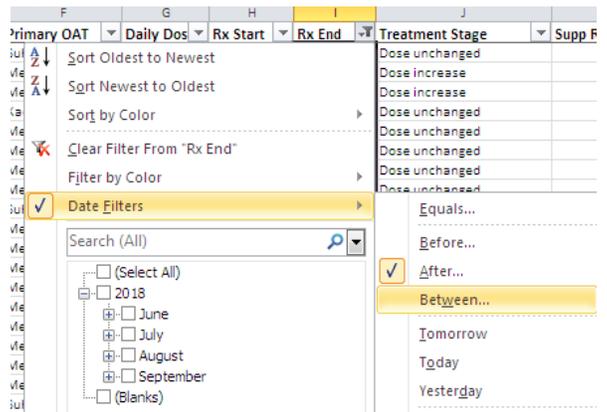
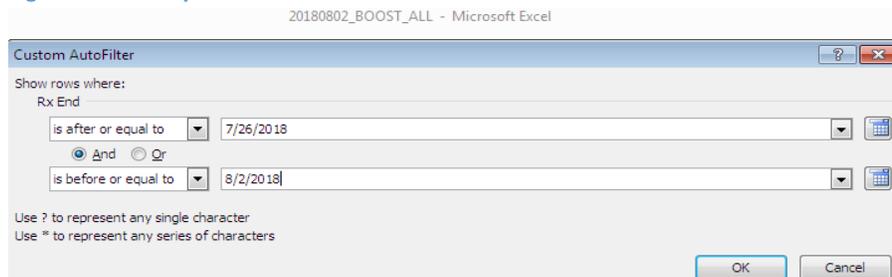


Figure 11 shows an example of how this would be completed for an extract from August 2<sup>nd</sup>, 2018.

Now click OK and the spreadsheet will display the clients who have their prescription expiring on the date of the query or during the week before the date of the query. Enter this count in your BOOST data tracker spreadsheet.

Figure 11: Filter by Rx End Between Dates



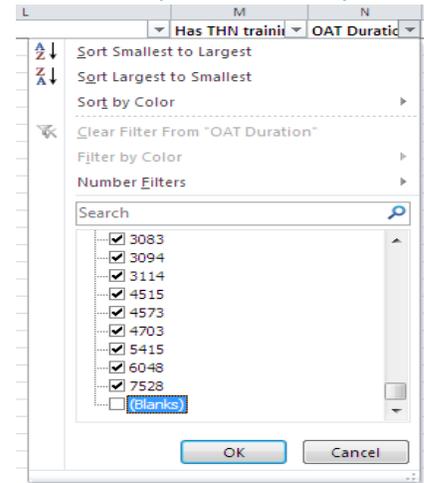
### Clients with a Most Recent Start Date (MSRD) entered

Now that we know the number of patients in our population of focus at the selected site, those with an active prescription, and those with a recently expired prescription we will need to identify the number of patients who have a Most Recent Start Date (MRSD). The MRSD enables us to obtain accurate retention data and duration of treatment.

Filter for clients with MRSD entered: The clients who have a MRSD can be identified by filtering OAT Duration column to exclude clients with a (Blank) OAT Duration. This can be done by selecting the dropdown filter of OAT duration and unchecking the box for (Blanks) as seen in Figure 12. This is the number of clients with MRSD entered. Enter the count for your OAT site into your BOOST data tracker spreadsheet.

Identify clients without a MRSD entered: The difference in the number of records found before this filter and after this filter is the number of patients who do not have a MRSD entered. To identify those patients, simply filter the OAT Duration column to only include Blanks by checking the Blanks box and unchecking all boxes with number. Having a MRSD is critical to identifying retention on therapy, a primary aim of BOOST. Clients without a MRSD should be identified and attempts should be made to obtain the MRSD.

Figure 12: Exclude Clients with Blank OAT Duration (No MRSD Entered)



## Retention on OAT

Filter for Clients on OAT based on OAT Duration: To determine retention on OAT, we can use the filters for the OAT Duration column. OAT Duration numbers correspond to the number of days a patient has been retained on OAT. We can decide the length of retention we want to identify and then filter for OAT Duration Greater Than Or Equal To that number of days. The duration time points collected on our BOOST data tracker spreadsheet are 30 days and 90 days. Figure 13 demonstrates how to obtain OAT retention, we can select the dropdown filter for OAT Duration > Number Filters > Greater Than Or Equal To...

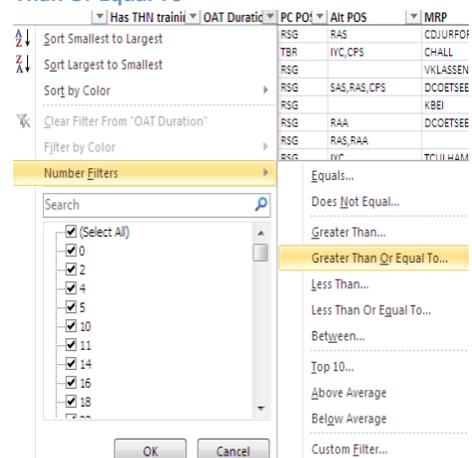
Clients on OAT >=30d: Enter 30 into the “is greater than or equal to” and click OK. This will appear similar to Figure 11. Now only patients who have been retained on therapy for greater than or equal to 30 days will be displayed. Enter this count on your BOOST data tracker spreadsheet.

Clients on OAT >=90d: Repeat the steps under **Retention on OAT** for OAT Duration Greater Than Or Equal To 90 to identify the number of clients on OAT >= 90.

## Great Job!

You have now completed obtaining the data for the BOOST Data Tracker.

Figure 13: Filter by OAT Duration Greater Than Or Equal To



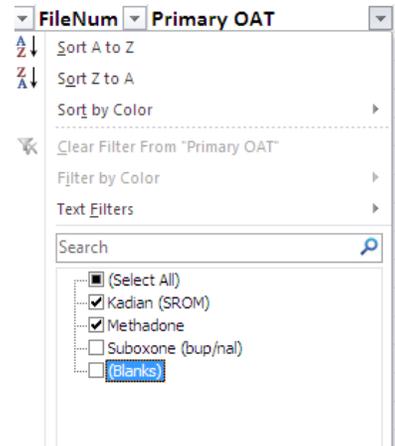
**Additional Metrics: Optimal Dosing & Take Home Naloxone (THN) Training**

After obtaining relevant retention data to meet your needs and identifying which patients need to have an MRSD entered we can take a look at 2 additional outcomes of interest: THN Training and Optimal Dosing.

Clients on Optimal Dose: Identification of patients with optimal dosing will need to be accomplished in 2 steps. We will need to identify all patients on optimal dose for methadone and then for Kadian (SROM).

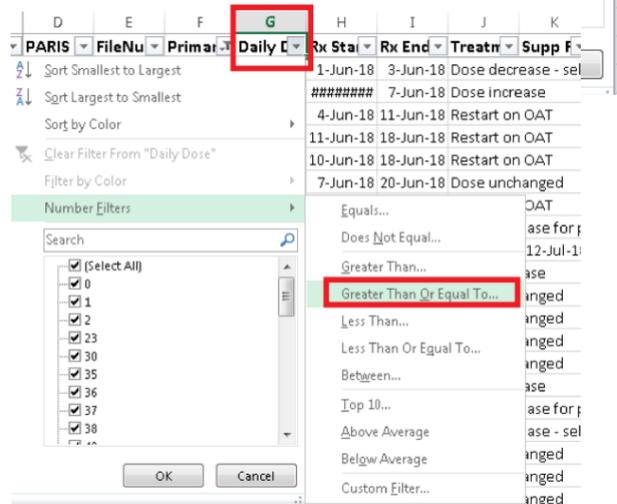
First, filter for Primary OAT for Methadone as similar to Figure 14, but while also unchecking the box for Kadian (SROM). Now filter for Daily Dose > Numer Filters > Greater Than Or Equal To... as shown in Figure 15. Enter 60 in the box following is greater than or equal to dropdown, an example is shown in Figure 16. Note the count. This is the number of methadone clients on optimal dose.

Figure 14: Filter Primary OAT for Methadone and Kadian



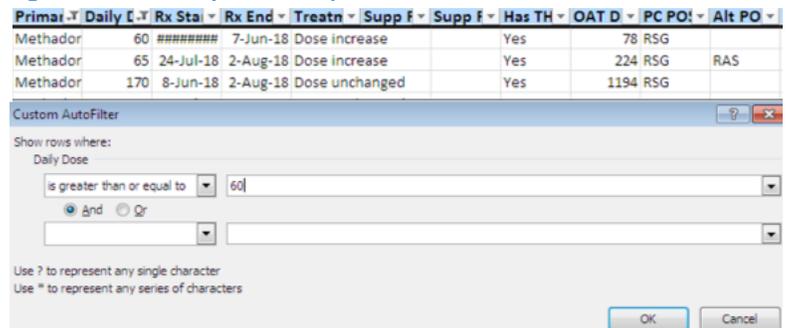
Second, filter Primary OAT for Kadian (SROM) and then filter for Daily Dose greater than or equal to "16". Note the count. This is the number of Kadian clients on optimal dose.

Figure 15: Filter Daily Dose Greater Than Or Equal To



Add the counts of both of these filters to identify the number of patients on optimal dose. This is the numerator for the number of patients on optimal dose. To obtain the denominator, filter for both methadone and Kadian (SROM) as shown in Figure 14 and note the count. Dividing the number of patients on optimal dose for Methadone and Kadian (SROM) by the number of all patients of Methadone and Kadian gives the proportion of patients on optimal dose.

Figure 16: Filter Daily Dose for Optimal Dose



Clients with THN Training: To identify all patients in your POF who have received THN Training, clear your filter on OAT duration and ensure you are filtering for the Primary OAT Site of interest.

You can now filter the “Has THN training” to only include “Yes” to identify only patients who have received training. Conversely, to identify which patients need THN training you can filter for patients with either “No” or “(Blanks)” in this column.