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In this document, red text designates areas of the program that are under construction or likely to change, as well as instructions that are currently incomplete.

# The Upgrade Process

### Understanding What Happens During the Upgrade

Some of the underlying table structures for PIMS data were changed in PIMS version 8. These changes were made to facilitate development of new reports on outcome tools, and improve the data aggregation utility to accommodate differences in outcome tools and groups. Note that when you upgrade your data table from PIMS version 7 to PIMS version 8, you will not lose any data- your data will be automatically migrated into the new table structure.

### PIMS Folder

describe the various files again, including queries.mdb, new templates, and calc table

### Pre-Upgrade Data Cleanup

The following data quality issues can result in problems with your upgrade. For best upgrade results, you should test for these data quality issues prior to upgrade.

|  |  |
| --- | --- |
| **Problem** | **Consequence of Not Cleaning This Data** |
| Broken ID links between screening and assessment or between assessment and intake | Unlinked participants will be interpreted as two separate people |
| Outcome tool names, etc. | … |
|  |  |
|  |  |

Before upgrade

* review site’s Outcome Definitions:
	+ Make sure each prepackaged non-generic form is used only once
	+ Make sure any generic tools match listings in tappl\_outcome\_generic\_lkup

### Installing PIMS 8 Alpha

Up-to-date installation instructions for PIMS can be found at <http://www.hfapims.org/software>.

### Post-Upgrade Data Cleanup

TBD, there may be some data quality reports to directly assess the success of the upgrade. At a minimum, sites should verify that outcome tools were successfully migrated to the new version.

See Outcome Aggregation in Google Docs

After upgrade

* Review site’s outcome definitions to ensure correct carryover
* Recordcount, etc.?

# Participant Status

### PIMS Participant Status Definition

see PIMS Participant Status Definition in Google Docs

see Verified vs. Presumed Retention in Google Docs

# Outcome Definitions

### Outcome Instrument Cutoff Scores

Have I addressed this at all in PIMS 8? May have in 2015…

# Program Forms

### Staff Supervision

TBD

### Staff Training

TBD

# Overview of Changes to Participant Forms

The forms in the **Participant Component** were substantially restructured for a number of reasons:

* improve flexibility of tracking Partners
* improve flexibility of tracking baseline data at any time between screening, intake, and assessment
* reduce dependence on the Refresh function at reporting time
* emphasize the linkage between baseline and followup data, as well as Intake and Info Change data
* enable the use of participant groups
* facilitate tracking of multiple screens, multiple assessments, or multiple intakes corresponding to a single person
* centralize tracking of static data (e.g., race, birth date) in one place (the **Home** form)

The chart below summarizes the changes to the **Participant Component**.

|  |  |  |
| --- | --- | --- |
| **form** | **role** | **Changed in PIMS 7** |
| **Assessment** | tracks all data recorded at time of assessment | **Mother of Target Child Demographics** moved to **Baseline** formBirth date, race, language, and religion moved to **Home** form |
| **Baseline** | tracks the same characteristics as the **Followup** form, at any time between Screening and Intake | tracks birth date, race, language, and religion (previously in **Assessment** form)tracks income, public aid, housing (previously in **Intake** form) |
| **Child History** (was Child Info Change) | tracks child’s history of linkage to medical providers |  |
| **Current Partner’s Intake** | DISCONTINUED | All father data moved to **Partner** form; father status for a given partner is tracked via selection of father in **Birth** form |
| **Father of Target Child’s Intake** | DISCONTINUED | All father data moved to **Partner** form; father status for a given partner is tracked via selection of father in **Birth** form |
| **Followup** | tracks the same characteristics as the **Baseline** form, plus contact and life course data for partners, and insurance status for children |  |
| **Home** NEW | tracks static characteristics, specifies current screen and assessment, and specifies current relationships | * race/ethnicity
* mother birth date
* case notes (new)
* language
* religion
* specify active screen/assessment
* specify current relationships- partner, father, child

This form also tracks group membership |
| **Participant History** (was Info Change) | tracks changes in participant and emergency contact info | Service Level and FSW data moved to **Service Level History** form |
| **Intake** |  | * some **Household Characteristics** (income, public aid, housing) moved to **Baseline** form
* Service level and FSW assignments still tracked in this form, but stored in tservice\_level\_history
* Any other data tracked in info change form (contact info, emergency contact, physician) moved to tparticipant\_history
 |
| **Partner** | track intake characteristics of all partners, including father of target child | tracks all data previously in **Father** Intake and **Current Partner** forms |
| **Service Level History**NEW |  | In PIMS 6, was constructed on front end from Info Change via **Refresh** function |

# Changes to Participant Forms

### Home Form

This form was added in PIMS 7, as a central starting point for data on all participants involved in the program, regardless of whether they have completed Screens, Assessments, and/or Intakes.

[add picture here]

**Current Contact Info**

This displays the current address and phone numbers for the participant. This data is drawn from the participant’s most recent **History** record. If no **History** records are available, it is taken from the **Intake**, **Assessment**, or **Screen** records.

**Case Status**

* **Case Status**- this is the person’s status, amongst the following possibilities:
	+ **Not Yet Enrolled** – the person does not have a completed **Intake** record.
	+ **Intake Completed, Awaiting Enrollment** – the person has completed an **Intake** record, but does not have a **Service Start** date, as determined in **Site Definitions**. For most sites, this means the person has not completed a home visit yet.
	+ **Active** – the person has a **Service Start** date, as determined in **Site Definitions**. For most sites, this means the person has completed a home visit.

### Home Visit Form

A **Notes** field was added. Sites can use this free-form field for anything they’d like.

# Reports- General Changes

### PIMS Standard Reports Menu

new screenshot!

describe the four steps for generating reports

describe separate dates for cohorts vs. activities

describe “Preview Cohort”

# Reports- Specific Changes

refer to BPS documents for most updates

### Discontinued and Renamed Reports

|  |  |
| --- | --- |
| **Discontinued Report** | **Replaced By…** |
| 2007 HFA Site Survey Tool | N/A |
| Intake Characteristics ***(renamed only)*** | Baseline Characteristics |
| Medical Provider Outcomes Summary | N/A |

### 04: Assessment Information Summary

This report now divides the heading “Reason for Refusing Services” into two separate headings, “Site Reason for Refusing Services” and “Participant Reason for Refusing Services.”

### 07: Service Acceptance Analysis

The order of columns was changed to improve readability. Each demographic section (Overall, Accepting Services, Refusing Services) now sums up to a total of 100% to enforce the notion that these columns do not reflect acceptance rates, but rather show demographic breakdowns for each outcome.

### *DISCONTINUED* 48: 2007 HFA Site Survey Tool

This report was designed specifically for the 2007 site survey. Though certain elements of this report may be recycled in future site survey designs, this specific report is considered to no longer be useful.

### *NEW* QA04: Multiple Screens, Assessments, or Intakes for One Person

Though it is technically allowable to have multiple screens, assessments, or intakes for a single person, this report is designed to help you troubleshoot whether these multiples are intentional.

# Custom Reports

TBD

# Database Administration Form

TBD

[need new picture]

# Data Validation

Aside from the extensive data checking embedded in PIMS reports, PIMS version 7 introduces some form-level data validation. *Some* of the changes include:

# New Procedures

### Using Groups

TBD

 **[Need step-by-step instructions]**

**[Need an Example]**