Microsoft teams – Accessing patient records

1.1 What is *Microsoft teams*

It is an online platform to share documents and have conversations with fellow team members. It is secure, exclusive to invited participants and best of all, it is free and easy to install.
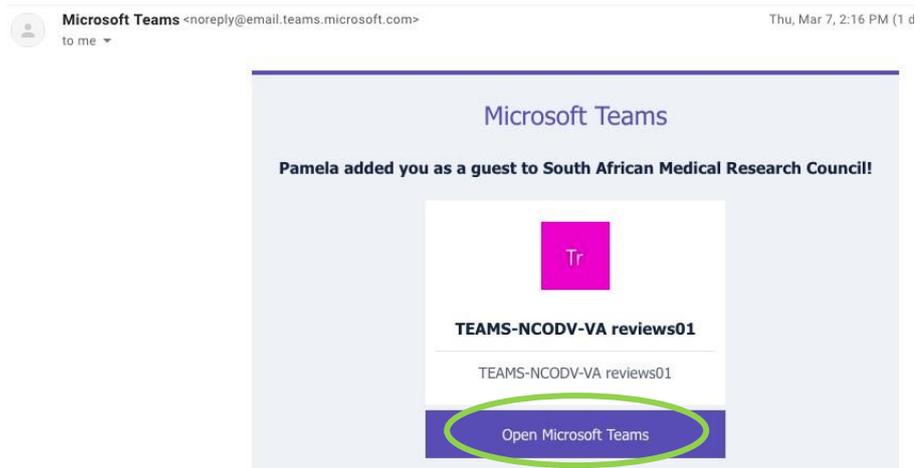
For the purpose of this study, you will be two reviewers per team. The cases (patient records) will be distributed to you as "Batches", in *Microsoft teams,* for you to review and certify. You will review and certify cases independently, but if there are discrepancies between reviewers for a particular case, the SAMRC reviewers will notify you and you can use *Microsoft teams* to discuss the case with your team to reach consensus. Where you do reach consensus, one member of the team should submit a new (third) record for the case. In consensus cases you will need to use a Reviewer ID made up of the letter **C** followed by both reviewers 2 digit IDs (insert 0 in front of single digit IDs) from smallest to largest e.g. Reviewer 01 and Reviewer 08 would be C0108. There will be appropriate places for this on the Kobo VA review form.

You will also be invited to a general team on Microsoft teams for group discussion when needed.
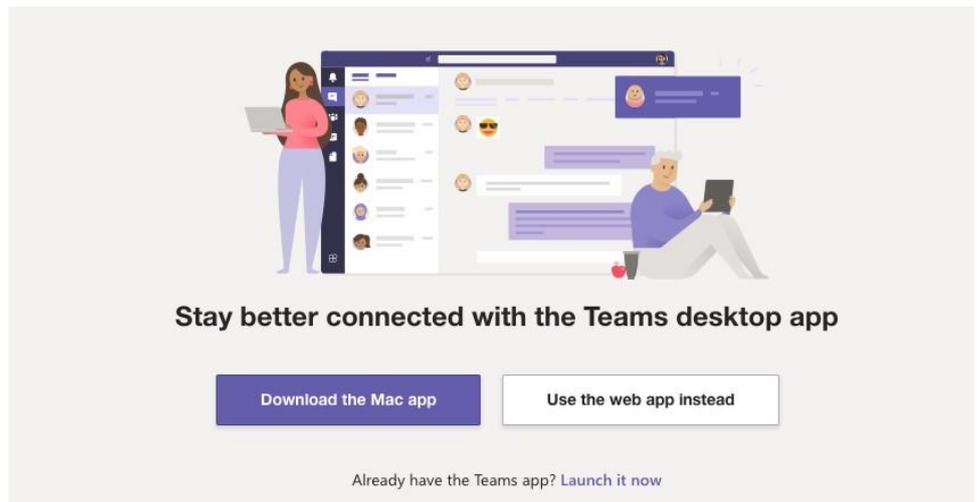
There will also be a Whatsapp group with all the doctors who are certifying. The purpose of the group is to give notifications if there are anything important to take not of e.g. if a questionnaire has been updated.

1.2 How to access *Microsoft Teams*

A link will be emailed to you by Pam Groenewald (*Teams NCODV VA reviews* team). Once you have joined the Team through the email link, you will be able to access it by simply opening Microsoft Teams and following the prompts for installation.

Download the desktop app for full functionality of Microsoft Teams.

Stay better connected with the Teams desktop app

Download the Mac app | Use the web app instead

Already have the Teams app? Launch it now

Once you have downloaded the app onto your computer, it is easily accessible by clinking on the *Microsoft Teams* icon. The documents (batches) in Microsoft teams will be updated centrally by Dr Groenewald. The two reviewers paired together will be able to access the information uploaded onto their *team*. All interfaces will however look identical.

13. <u>How to access patient records (Verbal autopsies, Medical and forensic records)</u>

For the first phase of data capturing, we will be certifying UCOD using the VA records.

Open Microsoft teams

Click on the **Teams button** on the blue, left sided column

Click on the VA **records tab under TEAMS-NCODV-VA**

Click on **files**, you will see it in the top horizontal tabs (not file in the blue, left sided column)

Click on a folder to open it (e.g. **Batch 1**): New Batch folders will continuously be uploaded onto Teams. Each Batch folder contains 40 folders, each of which is a different VA case, identified by the case's unique study identity number.
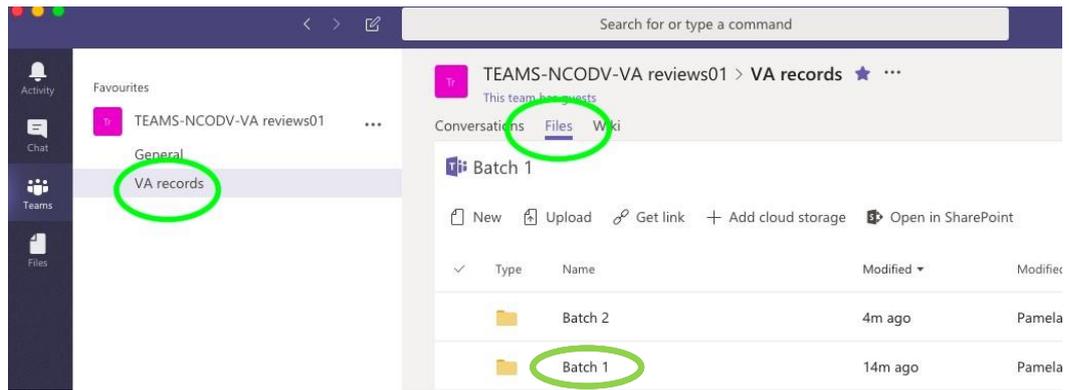
At the bottom of the Batch folder, there is an **Excel document**. This is the Excel spreadsheet that contains all the VA questions and answers for the 40 cases in the batch. You have the option of using either the excel format or the original VA questionnaire with answers **(you will need to request the original VA pdf from Pam as the file will first need to be anonymised)**. But we recommend using Excel for ease of reviewing.
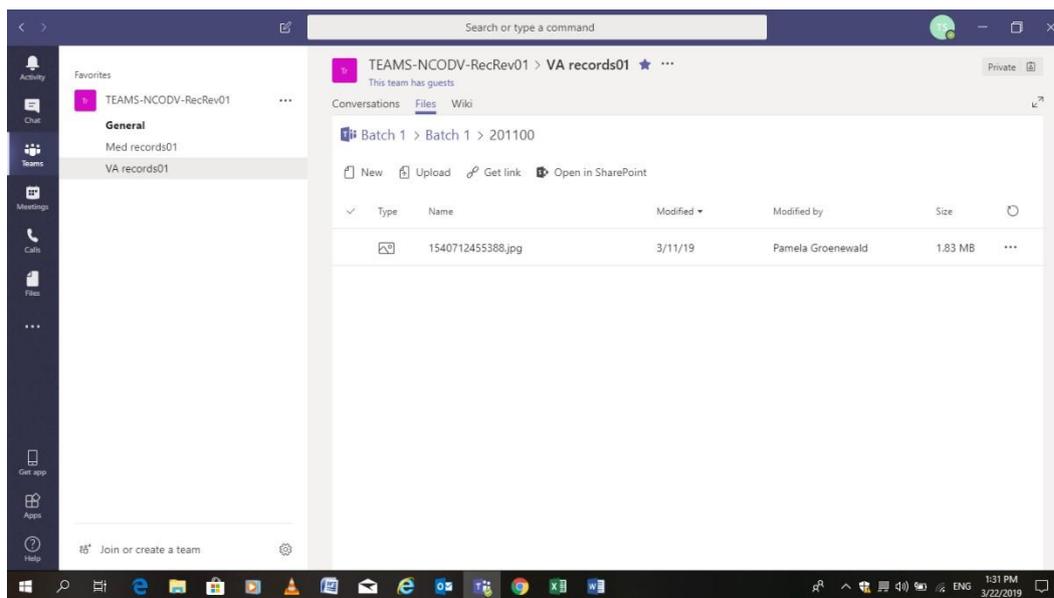
After you opened a batch, you will see the list of cases labeled according to their unique study identifier.
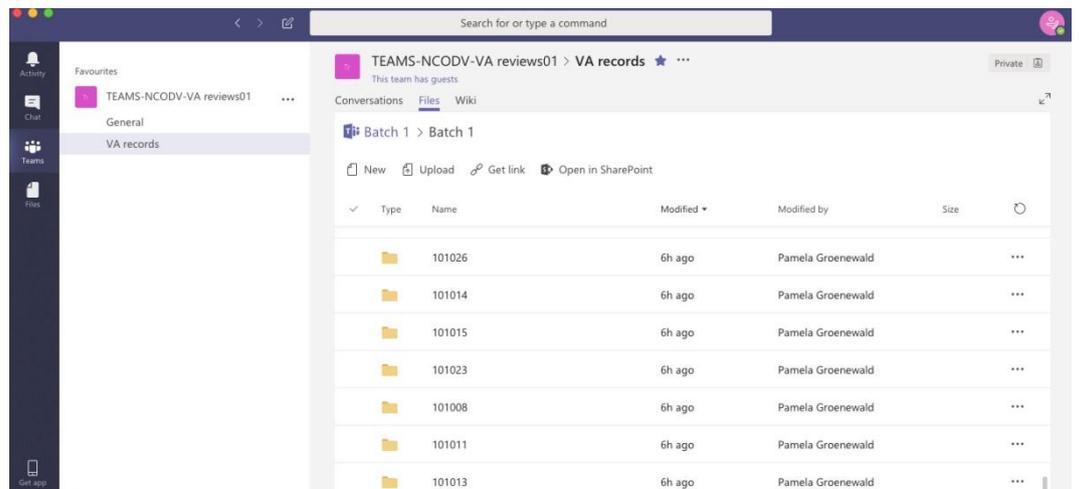
Open one of the **case folders (eg. 101013)**. Inside each case folder, you will find a photograph/s of the narrative and for children, if available, Road to Health Book.

Once you have opened a file, you can go back to the case folder by clicking **close** in top right corner. Be sure to confirm the study ID on the document matches that of the case you are working on. If you find a document that has been placed in the wrong folder, please alert Pam ASAP. (Pamela.groenewald@mrc.ac.za)
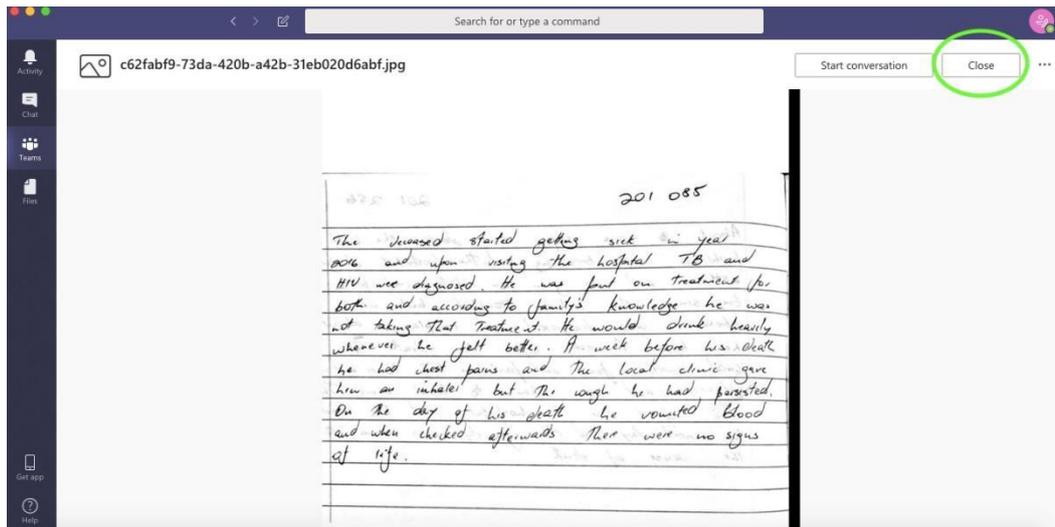
Reminder: Please keep in mind that the information within these documents is sensitive and confidentiality etiquette applies.

If you notice anything of concern within these records that pertain to misconduct in the clinical setting, please contact Pam in order for the matter to be addressed appropriately. Please **do not** contact the hospital concerned or discuss with anyone else.

Kobotoolbox

To be used with Microsoft teams. You will receive all the case information on Microsoft teams and then you use Kobotoolbox (either on tablet or computer) to capture the case information and certify underlying cause of death.

1.1 Lenovo Tablet

Switch on Lenovo Tablet – power button is lower button on right hand side. To unlock the tablet, slide upward on the screen.

At the bottom of the screen, there is a triangle, a circle and a square. The triangle is the back button.

Click on the white circle with 6 dots in the bottom centre of the screen to open the application menu.

You can get to the KoBocollect icon either by tapping the white circle and go to app via the applications menu. Or you can swipe right and see the KoBocollect short cut icon at the top the screen.
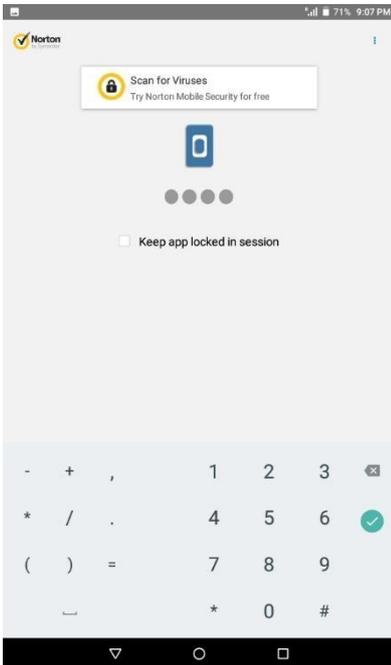
Click on KoBoCollect.

If it prompts you for a 4 digit password**.**

The KoBoCollect app will open. To download the correct questionnaire, click **Get Blank Form** and wait for it to connect to server.
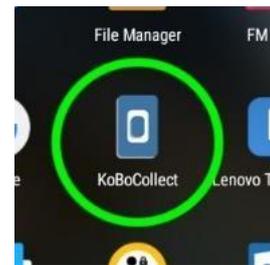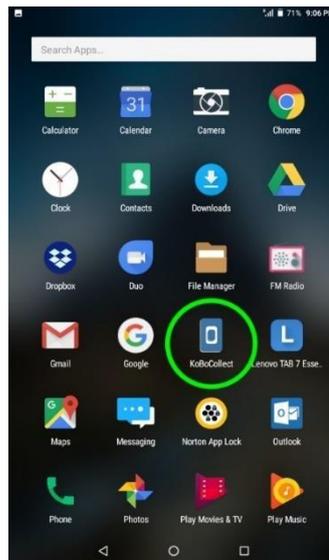
Select **Verbal Autopsy Review NCODV Main study** (blue tick). And click **Get selected** at the bottom right hand corner.
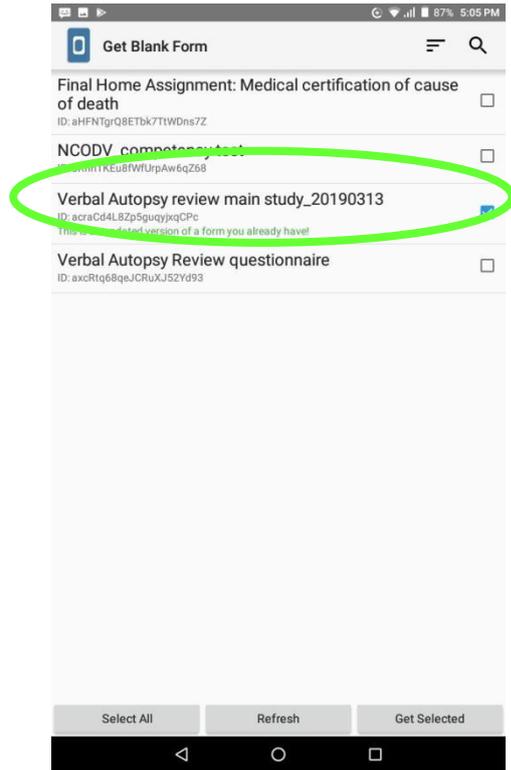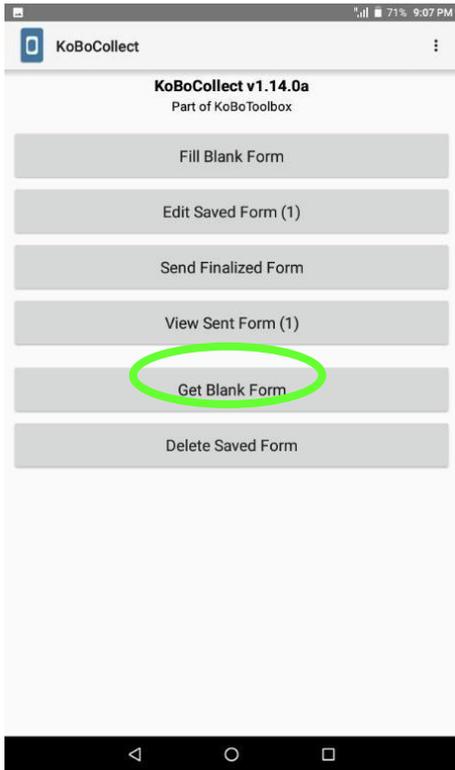

likely that there will be adjustments to the form. You will be informed if there is an **updated questionnaire** available. In that case, you also go to get blank form and select the document with the **green text underneath the title**: *This is an upadated version of a form you already have.*
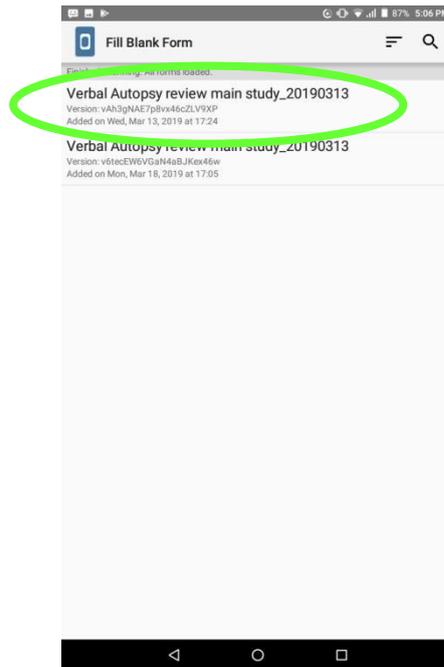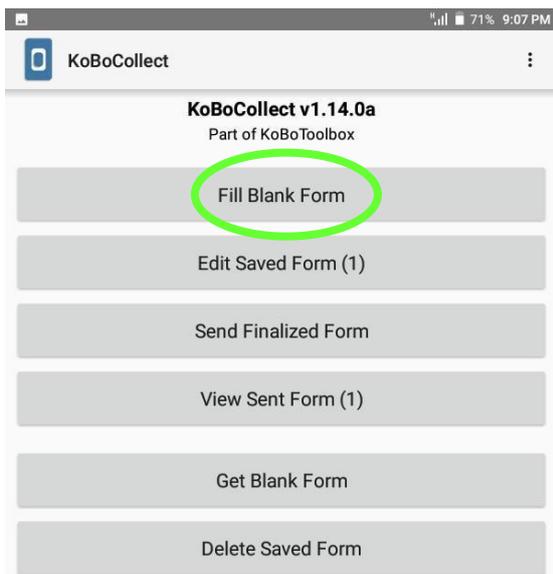
**1835**
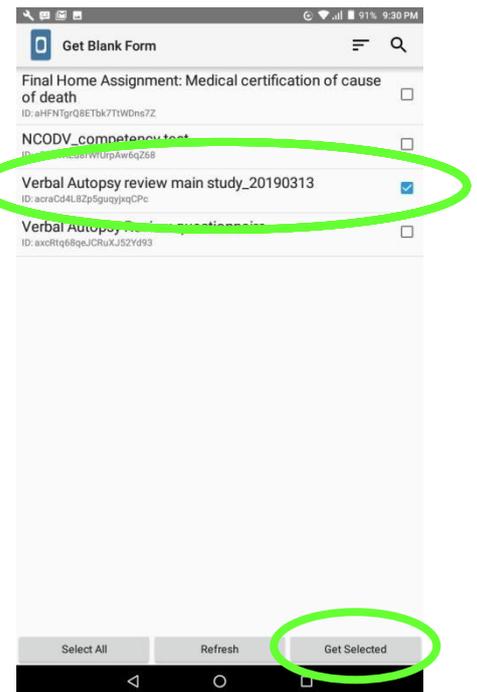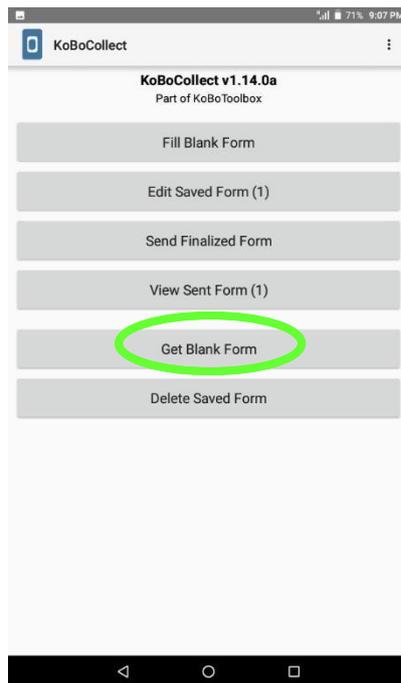
As the project continues, it is

To complete a questionnaire:

Practical thing to consider when filling in the questionnaire: To move to next page of questionnaire, slide finger from right to left across screen. To go back, similarly slide finger from left to right.

Click on **Fill Blank Form** and select **Verbal Autopsy Review NCODV Main study** form

Be sure to enter your Certifier ID, Unique Study ID and batch number for every case correctly. There will be a question later in the questionnaire that will ask you to confirm the unique study identifier.
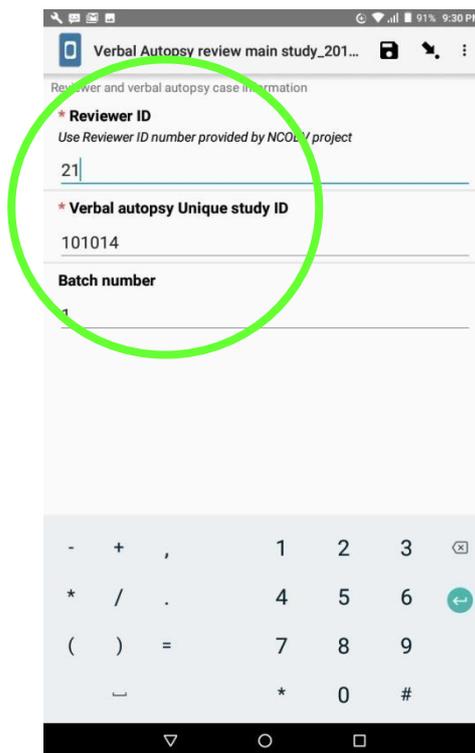
To enter the date manually, press on and hold down on the year or day to bring up the keyboard. You can also scroll to the correct date.
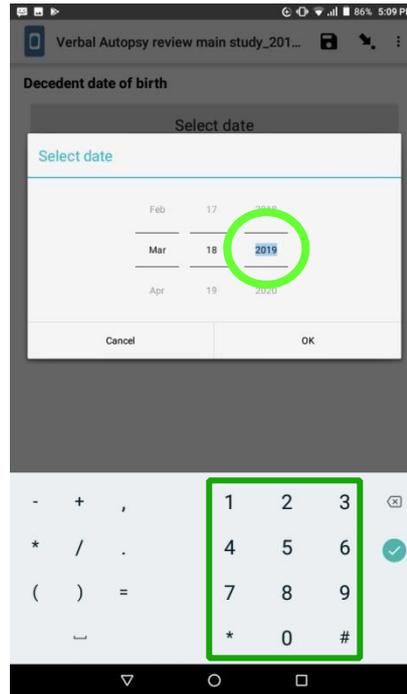
At the top right corner, there is an icon of an **arrow pointing to a dot** (see image below). This takes one to all the questions in the questionnaire in a list format. At the bottom of the list of questions, one can go to start or go to end of the questionnaire, or click on the question you want to go to.
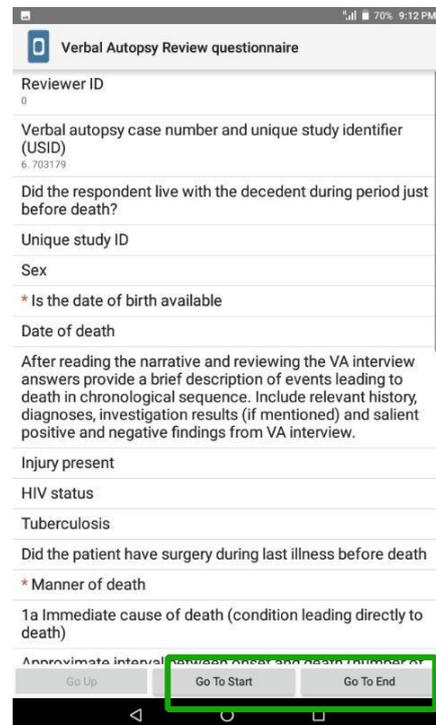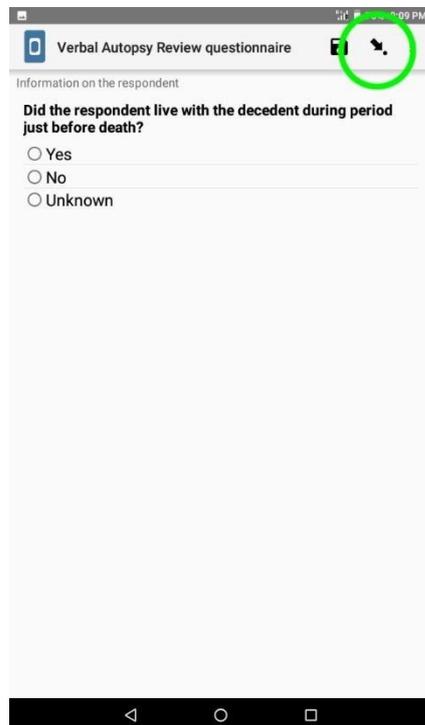
At the end of the questionnaire; **Name this form** as the Verbal Autopsy Unique Study ID. (E.g. 201108)

To save a draft, **untick** *Mark form as finalized*. (This box will be ticked automatically, so be sure to untick it.) Click Save Form and Exit.

To open a saved draft, press **Edit Saved Form**. The number next in brackets shows the number of saved forms. Then select the form you wish to edit.
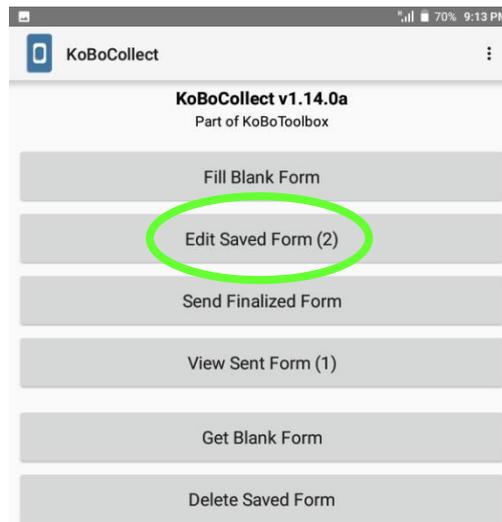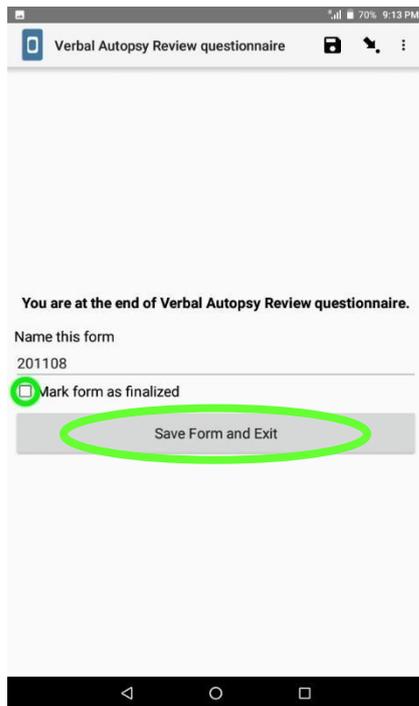
Submit finished case:

When you are satisfied with the certification and finished all editing, go to end of questionnaire, tick **Mark form as finalized.**
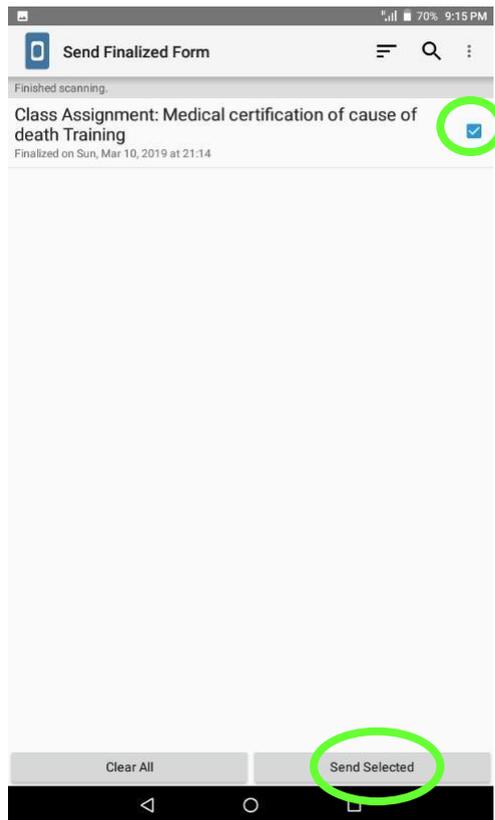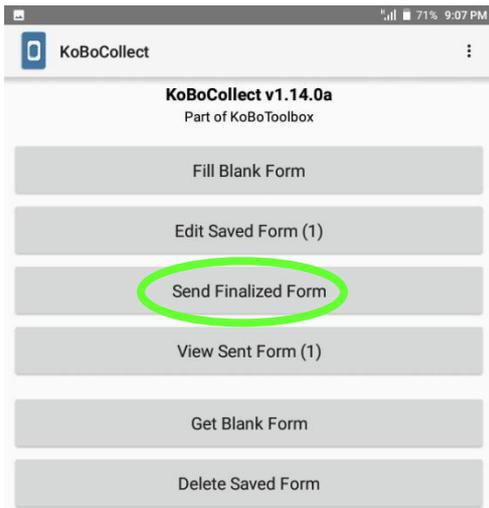
Click **Save Form and Exit**

To submit a finalized questionnaire, press **Send Finalized Form** on the Kobocollect main menu.

Select the form (questionnaire case number) you would like to submit, and press **Send Selected** at the bottom right. (You can submit multiple forms at a time. Be sure to only submit forms that are complete)

To delete a file:

Select **Delete Saved Form**

You can delete **saved forms** (completed forms that have been saved) on the top left or **blank forms** (questionnaire forms) on the top right. Select the forms you want to delete (blue tick).

Click on **Delete Selected** at the bottom of the screen.

After downloading an updated version of the verbal autopsy review form, it is advisable to delete the old form to prevent confusion. Be sure to select and delete the older form, added on the earlier date.

Once finalised forms have been submitted, these too can be deleted. Make sure you have submitted the forms before deleting.
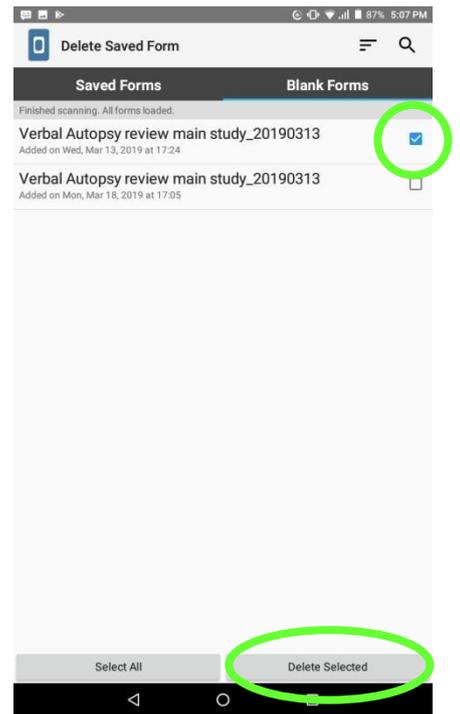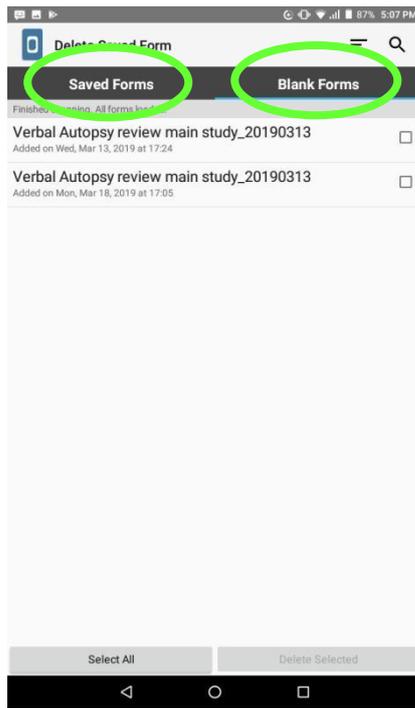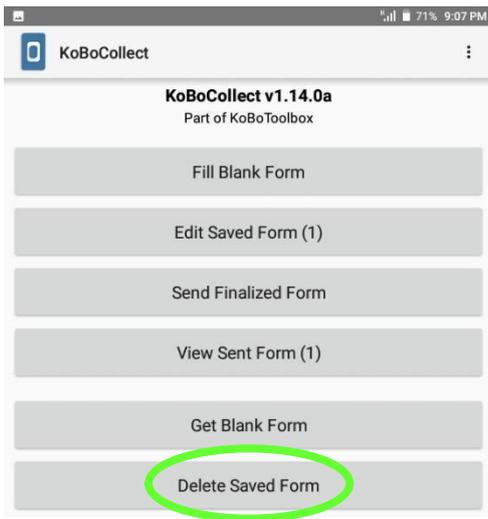
1.2 How to access KoBoToolbox on a computer or laptop

Go to https://www.kobotoolbox.org/

Please use **Google Chrome** to access KoBoToolbox. It is only compatible with Google Chrome and NOT with other internet browsers (e.g. Internet Explorer, Microsoft Edge, Safari, etc).
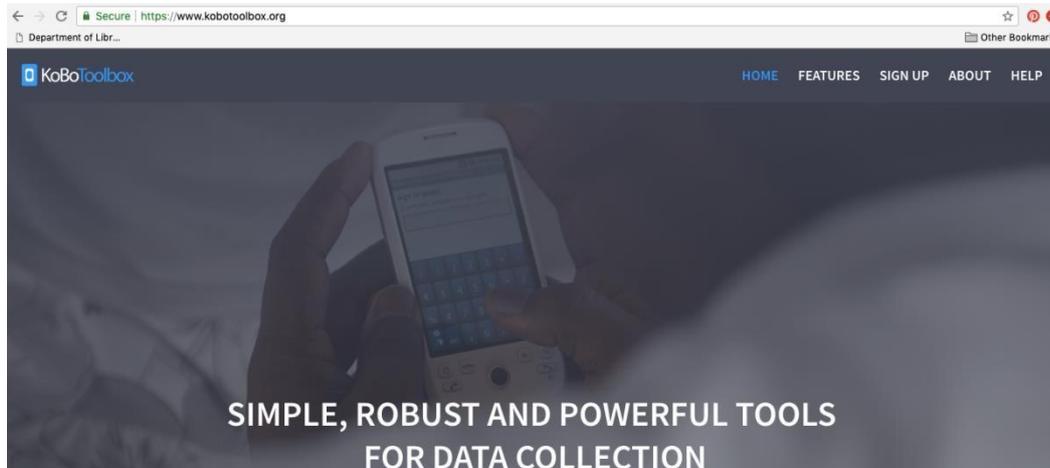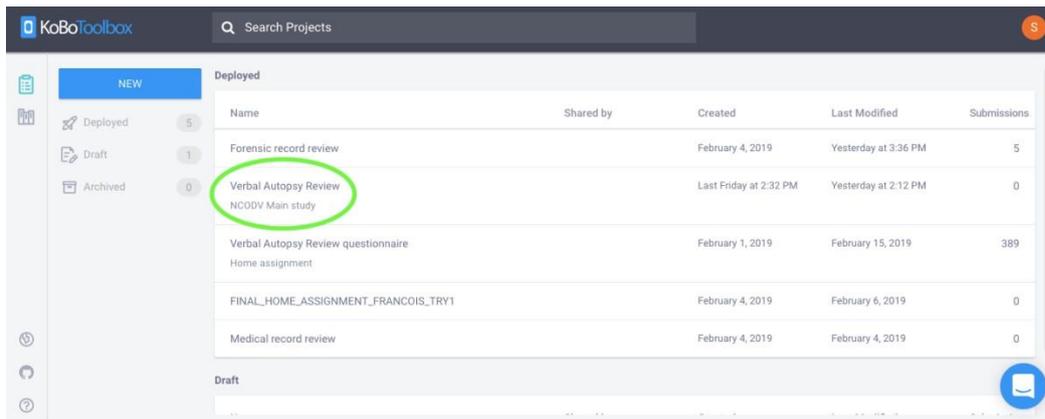

Scroll down to the login tab. Click on login on the righthand side.
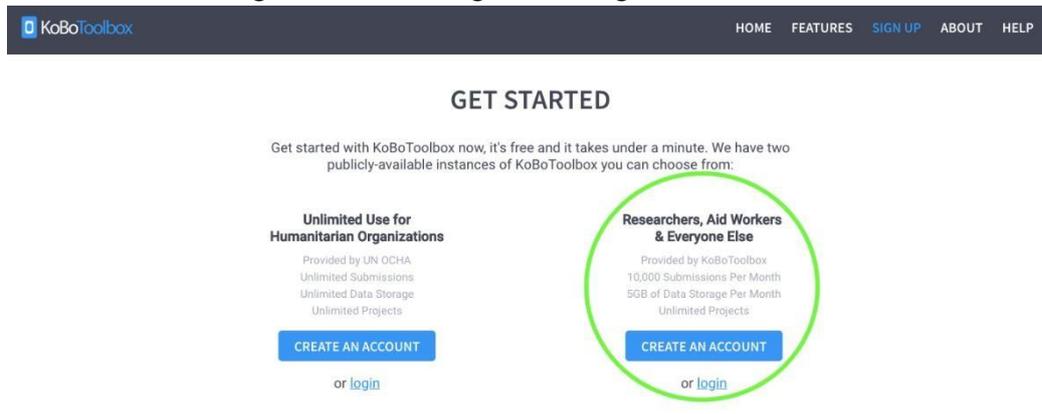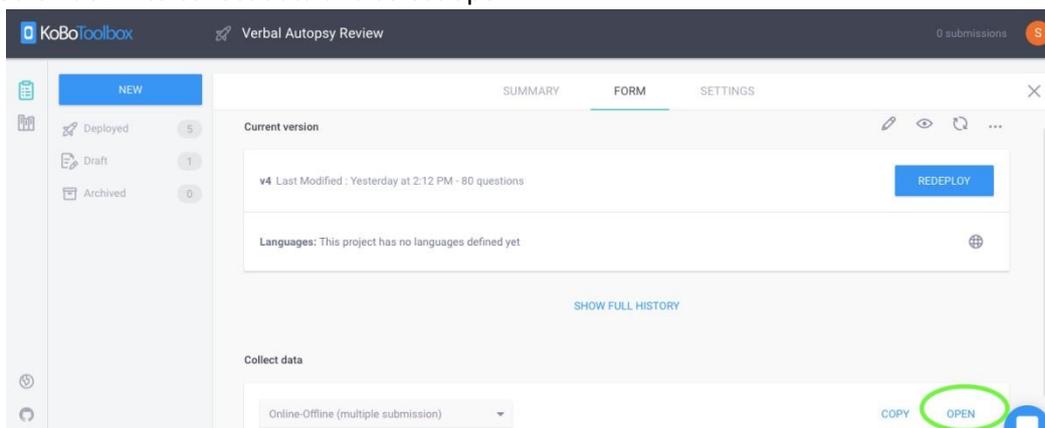

Login using username: password:

Select questionnaire named Verbal Autopsy Review NCODV Main study

Scroll down to collect data and select open.

Complete the questionnaire.

Insert your certifier ID and the Verbal Autopsy Unique Study ID. This is very important. When entering dates (e.g. for date of birth) the correct format is YYYY-MM-DD. Do not omit any digits. For example, DOB 5 July 2001 must be entered 2001-07-05.
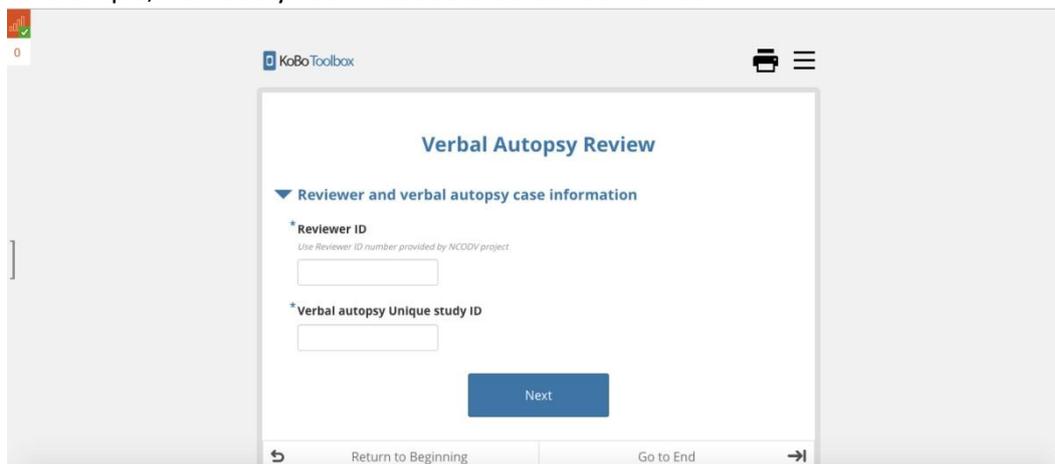
At the end select Save Draft. One can save draft even if the questionnaire is incomplete, but be sure to complete the questionnaire at a later stage.

Insert the record name using the Verbal Autopsy Unique Study ID.
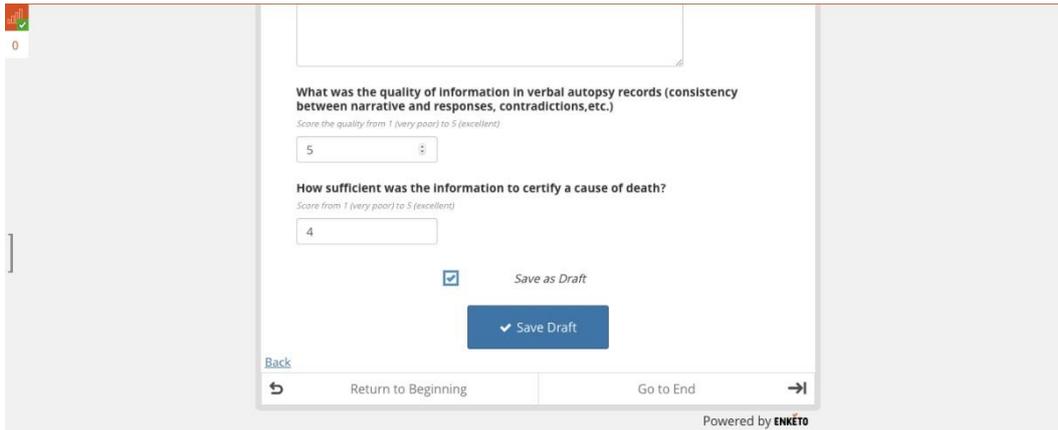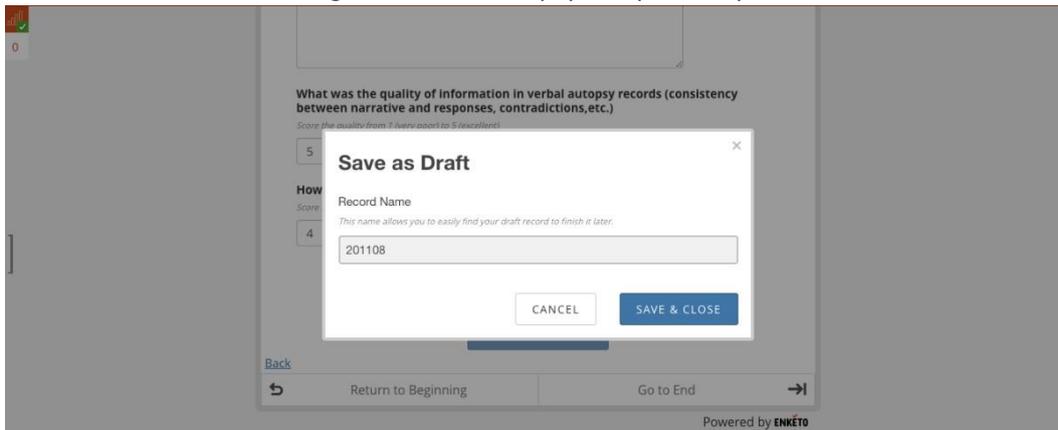

Click on the number in top left hand corner (Records queued) to open the record saved as draft.
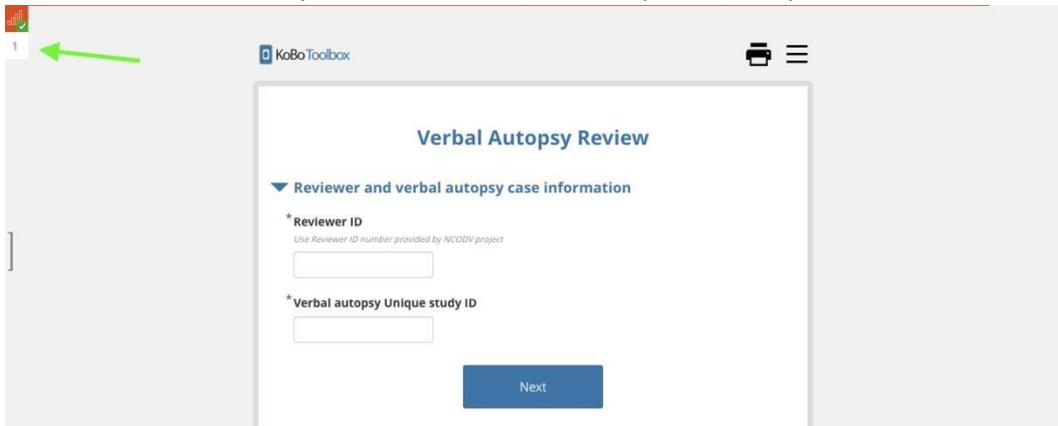
Click on the record displayed in the Queue to open it.

When you are ready to submit the document, go to the end of the record, untick *Save as draft* and select Submit.

Basic tips in Excel

Excel has some useful functions for making it easier to make sense of a spreadsheet with a lot of rows and columns.

Freezing panes

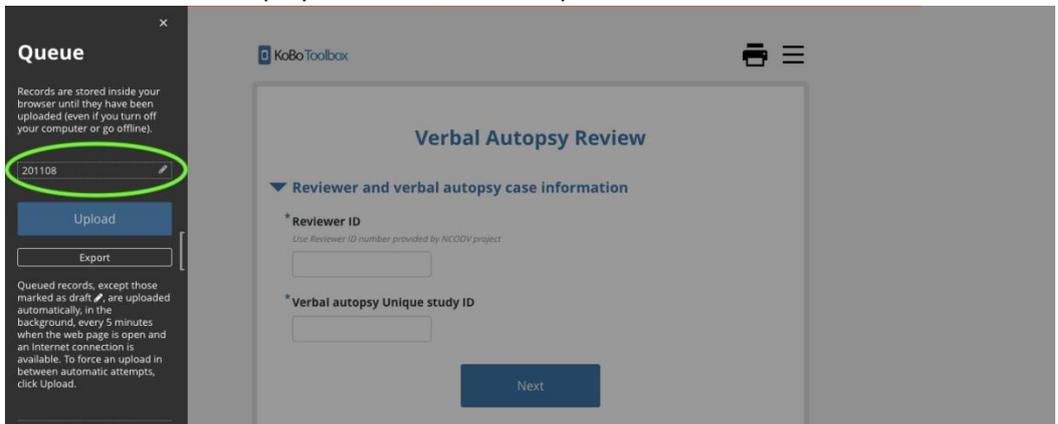This enables you to keep an area on the spreadsheet you're viewing visible while scrolling to another area on the same spreadsheet
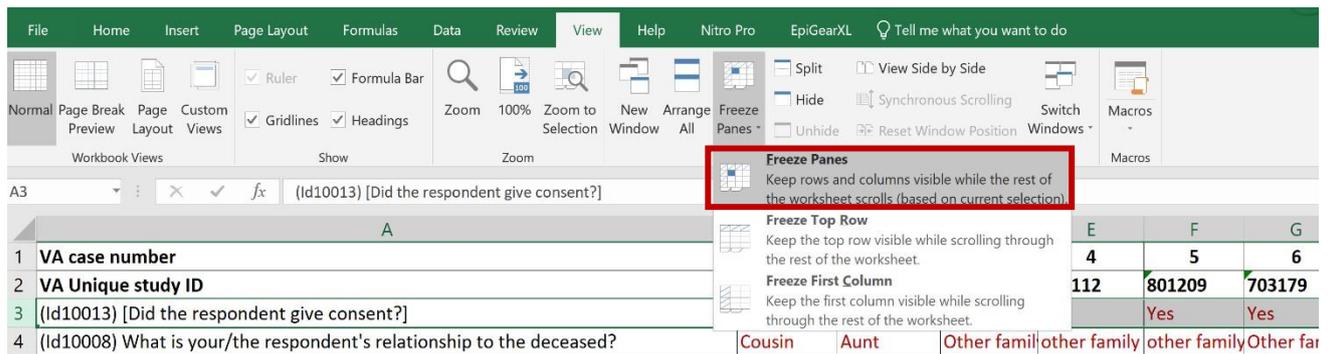
To freeze rows

1. Select the row below the row(s) you want to freeze. For example, using the final VA data home assignment spreadsheet, select row **3** to freeze rows **1** and **2**

	A	B	C	D	E	F	G
1	VA case number	1	2	3	4	5	6
2	VA Unique study ID	103030	103024	703063	701112	801209	703179
3	(Id10013) [Did the respondent give consent?]	Yes	Yes	Yes	Yes	Yes	Yes
4	(Id10008) What is your/the respondent's relationship to the deceased?	Cousin	Aunt	Other famil	other family	other family	Other family
5	(Id10009) Did you/the respondent live with the deceased in the period leading to her/	Yes	Yes	Yes	Yes	Yes	Yes
6	(Id10019) What was the sex of the deceased?	female	male	male	male	male	female
7	(Id10020) Is the date of birth known?	Yes	Yes	Yes	Yes	Yes	Yes

2. Click the **View tab** on the ribbon, then select **Freeze Panes.** You will get a drop-down menu.
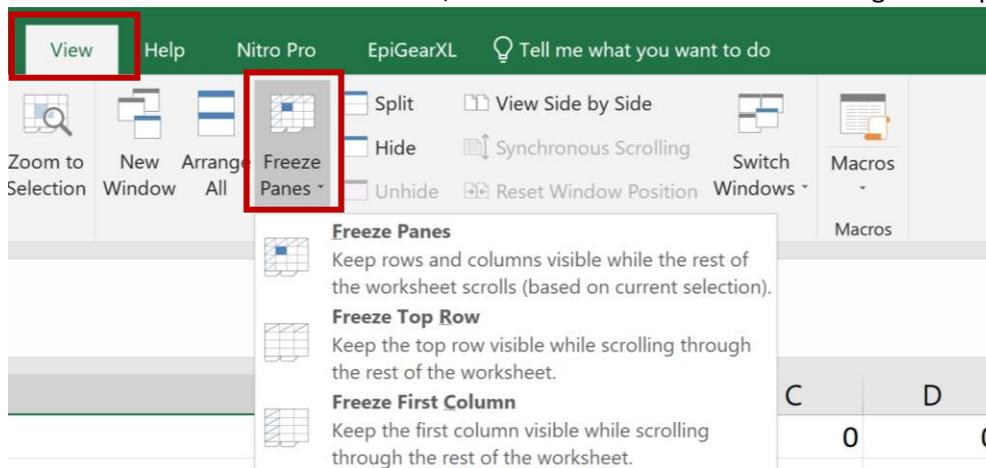
3. Select **Freeze Panes** from the drop-down menu.

4. This will **freeze rows 1 and 2** in place (you will see a dark gray line) and allow you to view the VA case number and VA Unique study ID as you scroll down the spreadsheet.

To freeze both rows and columns:

1. Select the row below the row(s) you want to freeze (as shown in section x above)

2. Then select the **first cell** to the **right** of the column(s) you want to freeze

3. Click the **View** tab on the **Ribbon**, then select the **Freeze Panes** command and **Freeze Panes** from the drop-down menu
4. This will **freeze rows 1 and 2, and Column A** in place (you will see a dark gray line) and allow you to view the VA case number and VA Unique study ID, as you scroll down the spreadsheet.

Furthermore, you will also be able to view the VA responses for the specific study ID you want across the spreadsheet with the question in **Column A.**
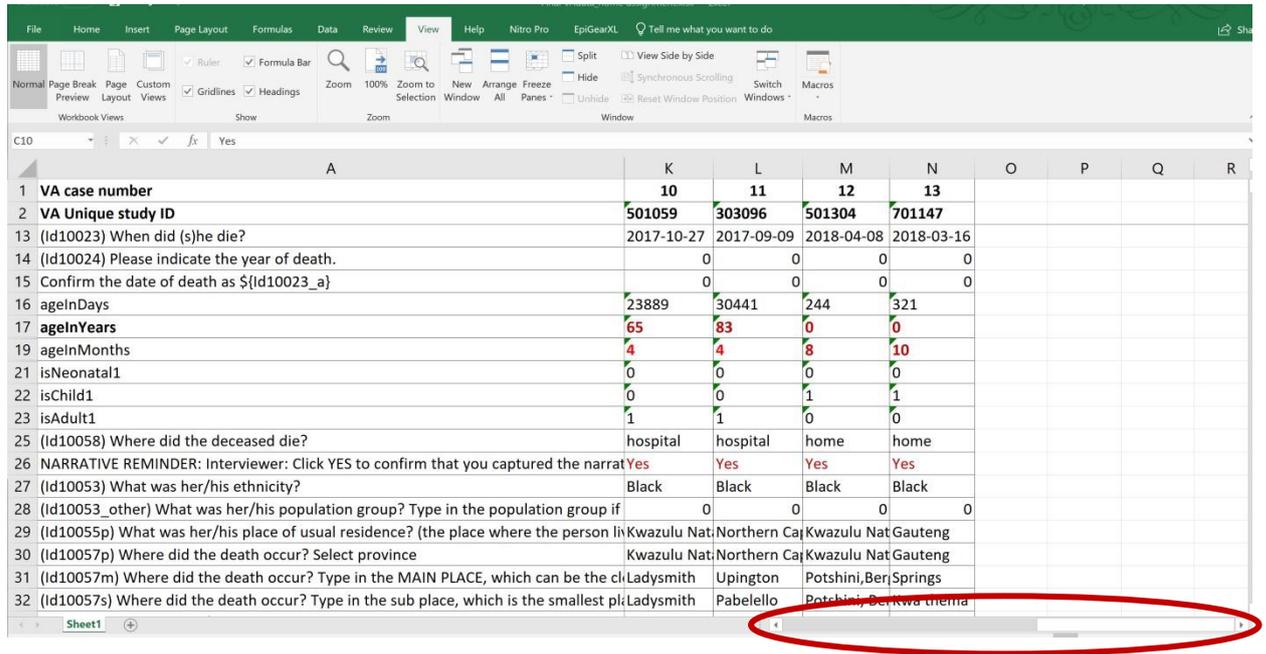
You can use the highlighted tab to scroll across the spreadsheet.

5. To **unfreeze panes**, click the **View** tab on the **Ribbon**, then select the **Freeze Panes** command and **Unfreeze Panes** from the drop-down menu
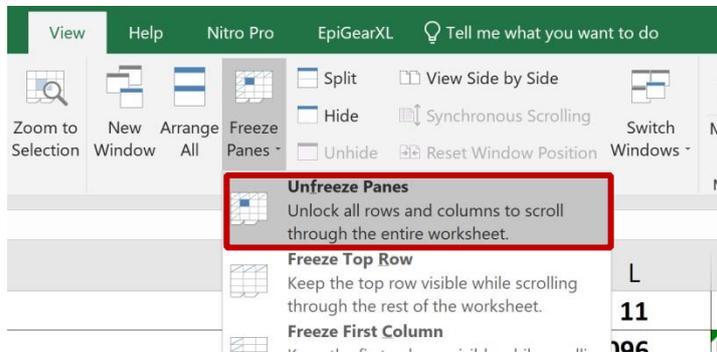
Filter

The **Filter** command in Excel allows you to view only the data you are interested in on your spreadsheet. For example, when you get feedback on certification for VAs, you can **filter** the list to limit the data you see to only those specific to your Reviewer ID.

1. Select the **Data** tab and locate the **Sort and Filter** group.
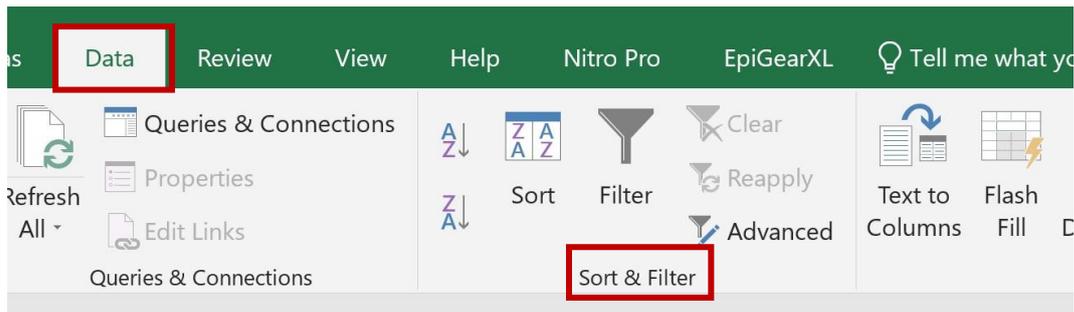
2. Click the **Filter** command.
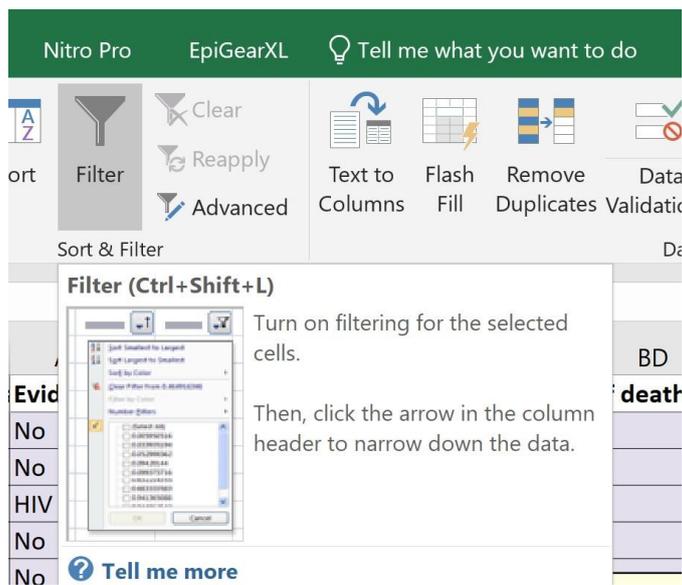
3. **Drop-down arrows** will appear in the header of each column. Click the **drop-down arrow** for the column you want to filter. For example, Reviewer ID. This displays the **Filter menu**.
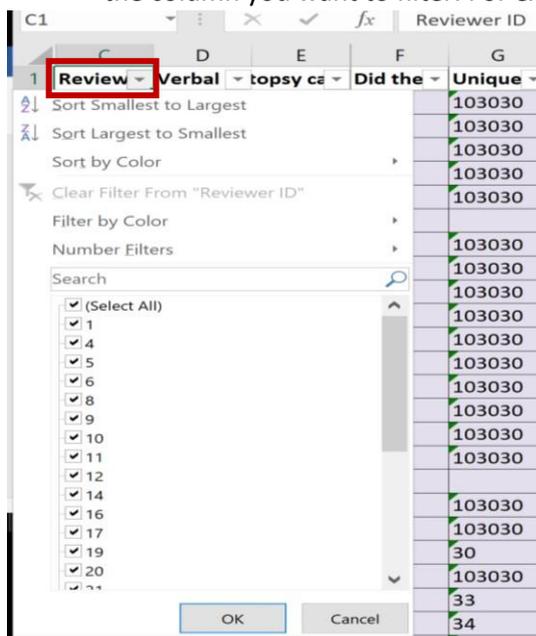
4. **Uncheck** the boxes next to the data you don't want to view or uncheck the box next to **Select All** to quickly uncheck all, and then **check** your preferred box.
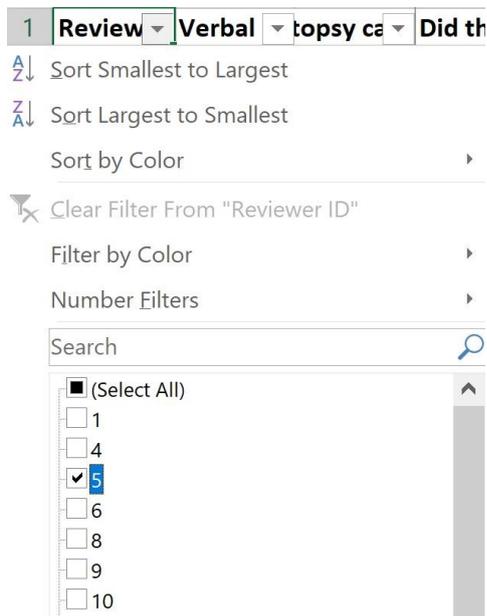
5. Click **OK**. All other data will be filtered, or temporarily hidden. Only Reviewer 5's responses will be visible.

Useful links

https://edu.gcfglobal.org/en/excel2013/freezing-panes-and-view-options/1/

https://edu.gcfglobal.org/en/excel2010/filtering-data/1/

Consensus case on Kobotoolbox

1. After both certifiers have completed a batch (VA records) and submitted their (+- 40) cases on Kobotoolbox either on laptop or the provided tablet. Then a quality assessor (QA) will go over the cases to see if both underlying cause of death (UCOD) for each case correlates with each other. The QA will also make sure that the causal sequence makes sense.

2. The QA will post an Excel spreadsheet within your Microsoft Teams channel and communicate general comments or certain instructions.

3. Once you have looked at the Excel sheet, you can start discussing the conflicting cases with your certifying partner and reach a consensus on the UCOD for that case. **You can have the discussion on Microsoft teams. (Picture instructions to follow in this document)**

4. Now you are ready to submit a consensus:
   a. Divide the cases up evenly. Each person to submit the same amount of consensus cases so that HR can calculate how much you need to get paid. (If you have an uneven number, you can alternate who submits the higher number in the next batch)
   b. You use the **same form** you used for submitting your initial cases on Kobotoolbox.
   c. When submitting a consensus case you will answer a few things differently:
      i. You will indicate that this is a **consensus case** (not an independent review).
      ii. There will be an option to give **consensus reviewer ID**. The number will be capital C (for consensus) followed by your certifier ID number and then your partner's certifier ID. For single values you need to put a 0 (zero) in front of it. E.g. for certifier 4 and certifier 36, certifier 4 will submit **C0436** and certifier 36 will submit **C3604**.
   d. When submitting/saving your consensus case at the end of the form you also need to state the **consensus reviewer ID.** E.g. C0436
   e. Some of these Verbal autopsy cases are tricky, so if you cannot come to a consensus or are unsure about certifying rules. Please inform the QA and then the cases will be reviewed by a third doctor. If the third doctor cannot conclude the case, the case will be reviewed at a panel discussion.

Communicating on Microsoft Teams

1. You will be notified via Microsoft teams when you need to submit a consensus case. A quality assessor will review your submitted cases. They will attach an excel spreadsheet with the cases for review and a few comments within your specific team e.g. **TEAMS_NCODV_RecRev04.**

2. To go to your team: On the left-hand column (Navy blue) you will see tabs (picture icons) listed; activity, chat, teams etc. **Click on Teams icon.**

3. In the white column next to the picture icons you will see your team. Click on your team e.g. TEAMS_NCODV_RecRev04 and it will give you drop down options saying **General or VA records04**
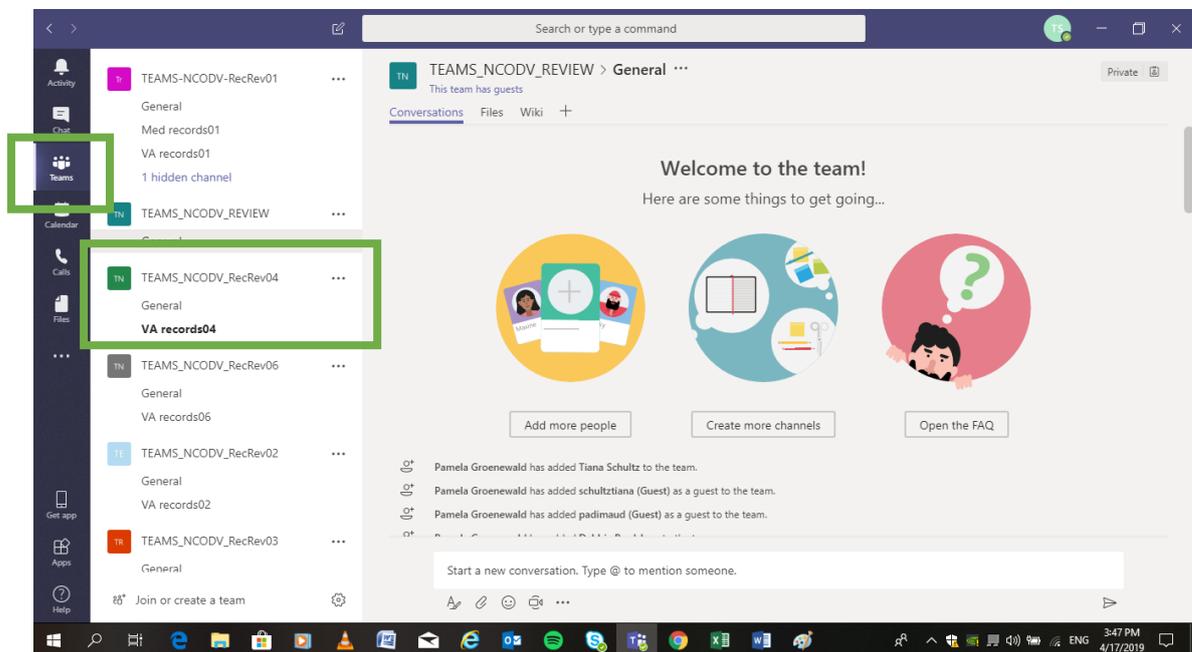
4. Let's get the conversation started - Multiple ways to do this:

- **Within your specific team** under **VA records** you can discuss the cases with each other to get to a consensus on the particular cases. Go to the **conversations tab** on the top horizontal bar. Start a new conversation in the white bar at the bottom of the screen.
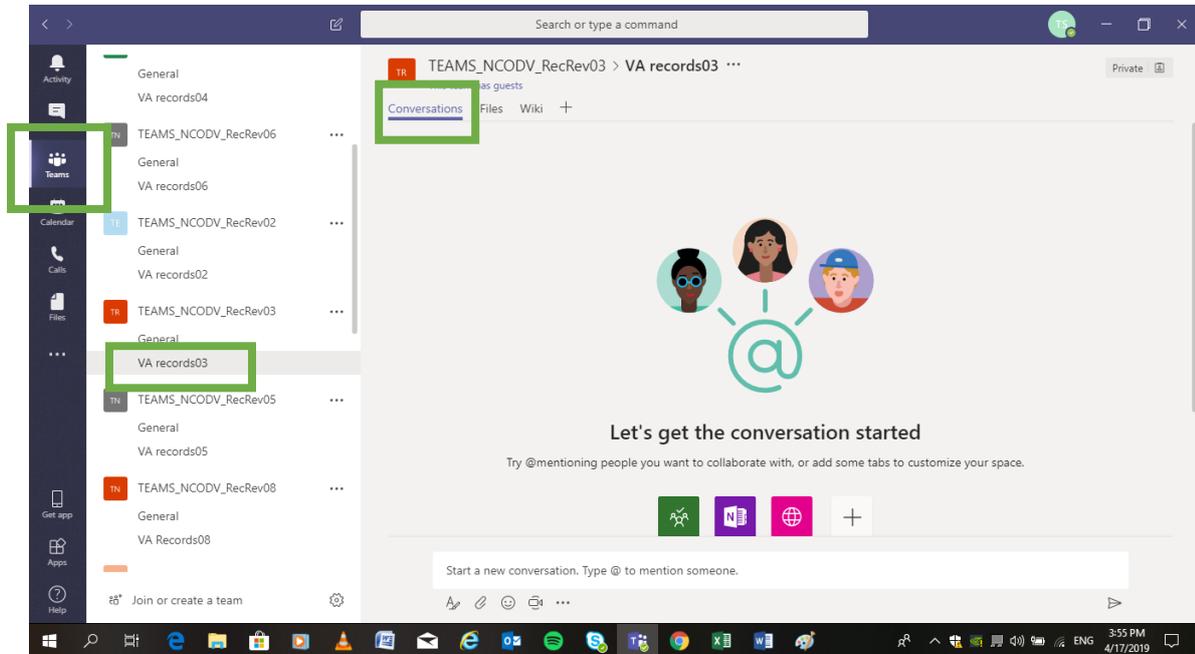
- Alternatively, you can also have private conversations. Go to the **Chat icon** in the left-hand column. You can send messages to either the person facilitating your team or with the other certifier when you need to reach consensus on a case or you just discuss your lovely weekend plans 😉
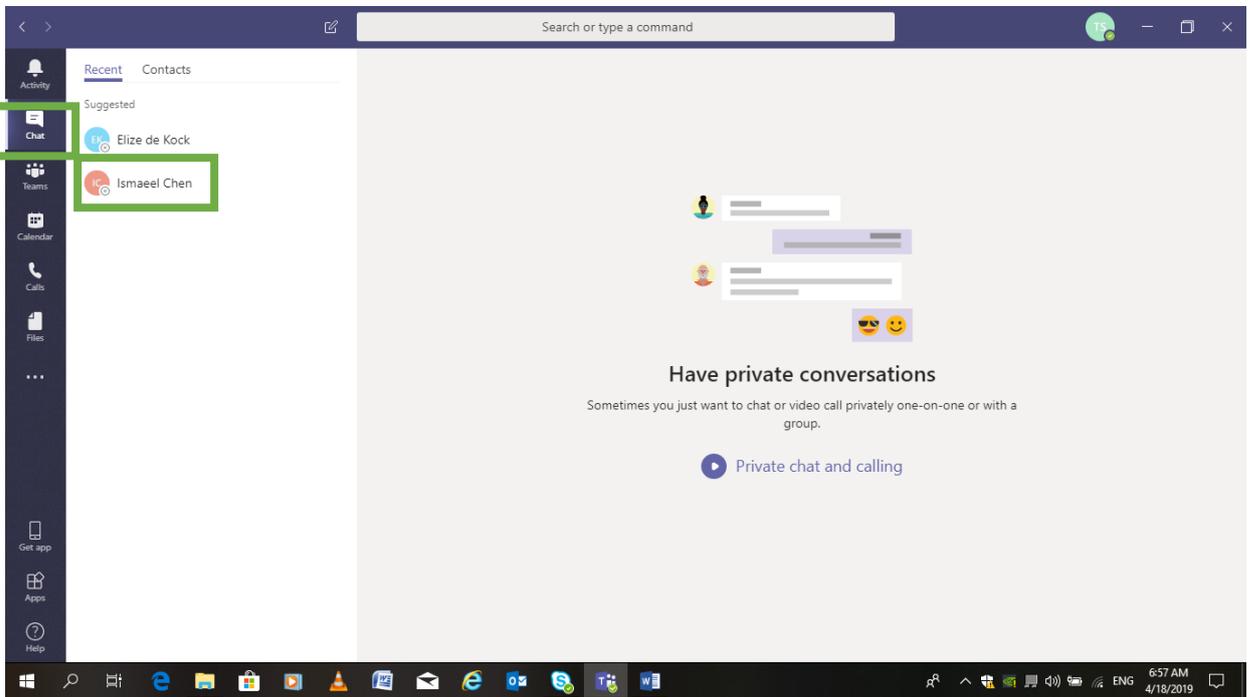
- Go to the contacts tab on the left-hand white column. There you can add a contact. Select the contact you want to chat to. Start typing your message in the white bar at the bottom of the screen. In the top right-hand corner, there are blue picture icons with options to **phone** or **video call** the contact.
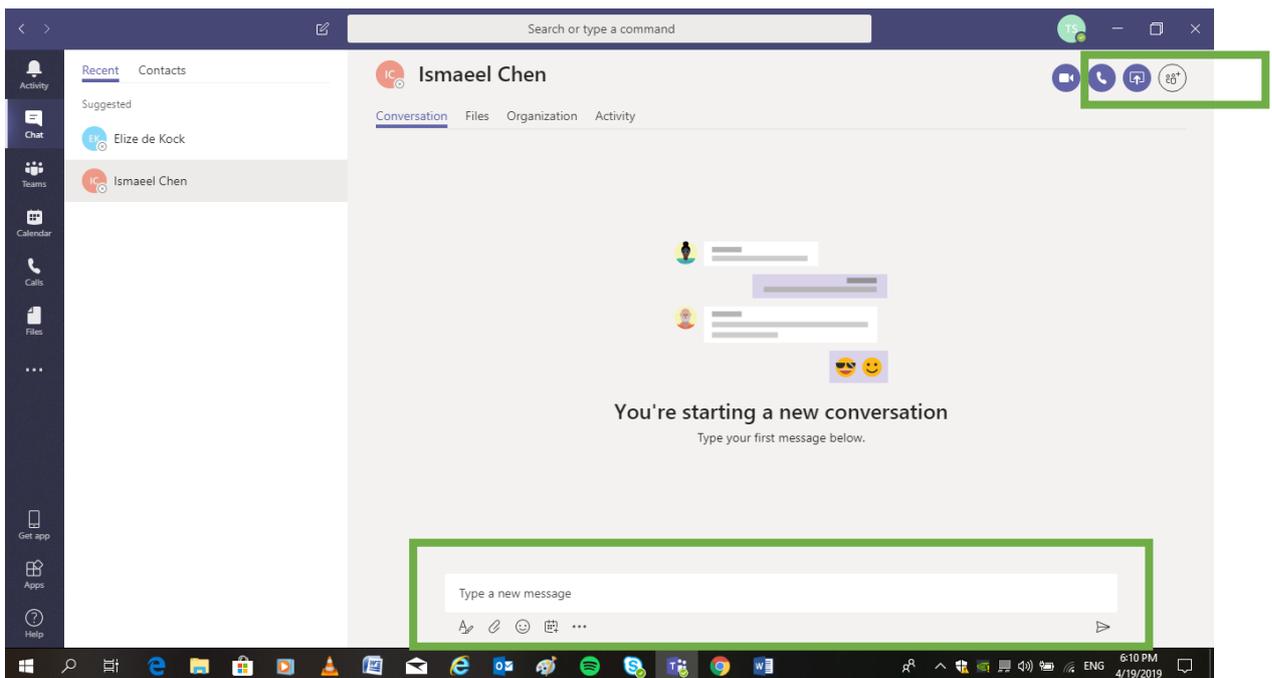
- There is also a **Call icon** (Left-hand column) that you can use.
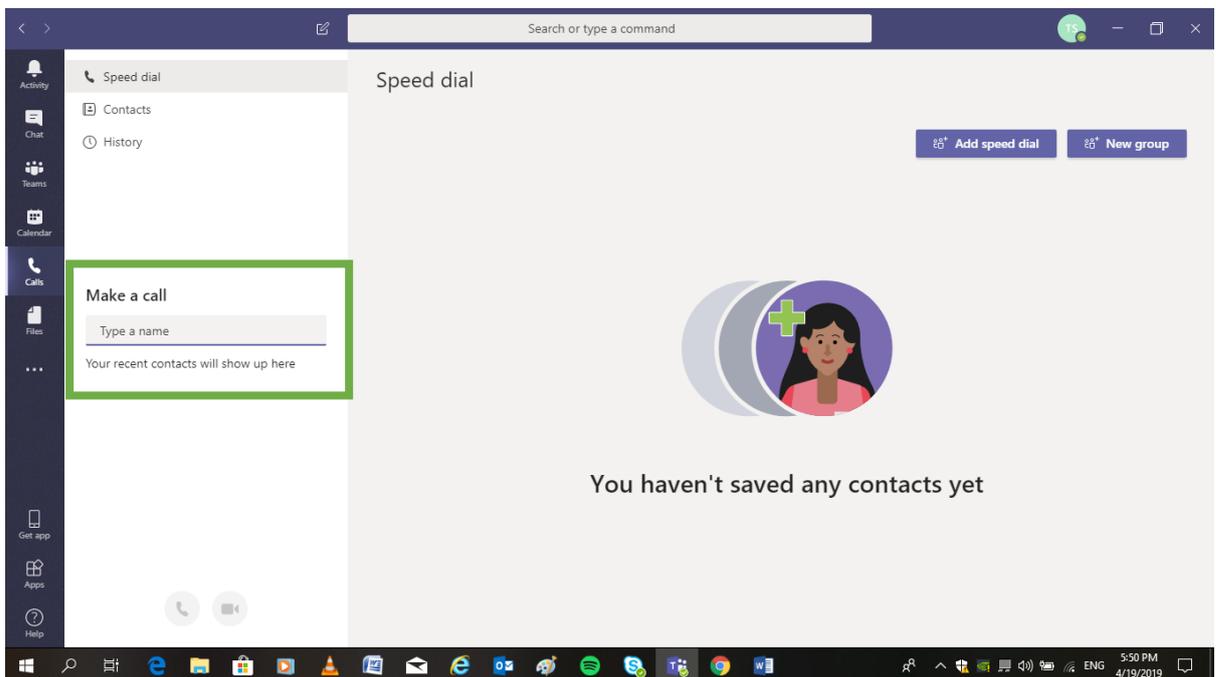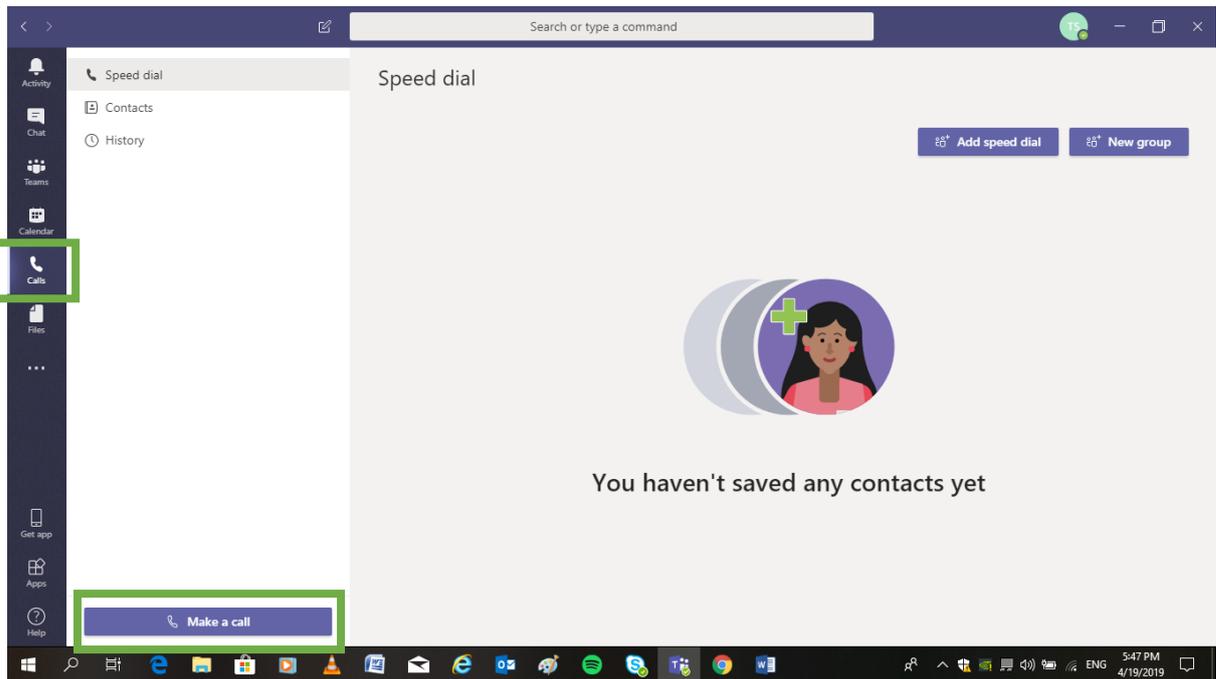
Document content

- Opening Kobotoolbox step by step guide
- Opening Kobotoolbox explained with screen shots
- The 15 cases for the home assignment

**Step by step guide: How to open Kobotoolbox and to submit assignments on computer**

1. Go to https://www.kobotoolbox.org
2. Scroll down to the **login** tab: Researchers, aid workers and everyone else
3. Login using Username**: XXXXX**   Password: **XXXXX**
4. *Select questionnaire named Verbal autopsy review questionnaire*
5. Right side of the screen under quick links select the tab: **Collect data**
6. Scroll down, in the bottom right hand corner click: **open**
7. Insert your **Certifier ID** and select Relevant **Verbal autopsy case number**
8. Complete the form
9. Duration between onset of conditions and death
   - If immediate select: **0** and minutes as unit.
   - Unknown duration select: **9999** for the duration and select the appropriate unit eg. If you know that it was a number of years, select **9999** for duration and select **years** for the unit.
10. Once you have completed the form tick: **Save as Draft**
11. Insert the Record name using the verbal autopsy case number of the Case Scenario ex. **VA Case 1**
12. If you are happy with your answers and want to submit: Click on the number in top left hand corner (**Records queued**) to open the record saved as draft.
13. Click on the record displayed in the Queue to open it
14. Go to the end of the recor**d, untick** th**e** Save as draf**t** and then clic**k Submit**
15. Continue until all 13 case scenarios have been completed and submitted.
16. The total number case scenarios will still be queued in the top right hand corner, click on the number. A drop down column will appear listing all the cases. Click on the **upload** button at the bottom of the column.

Screen shot guide (same as above)

1. Go to https://www.kobotoolbox.org
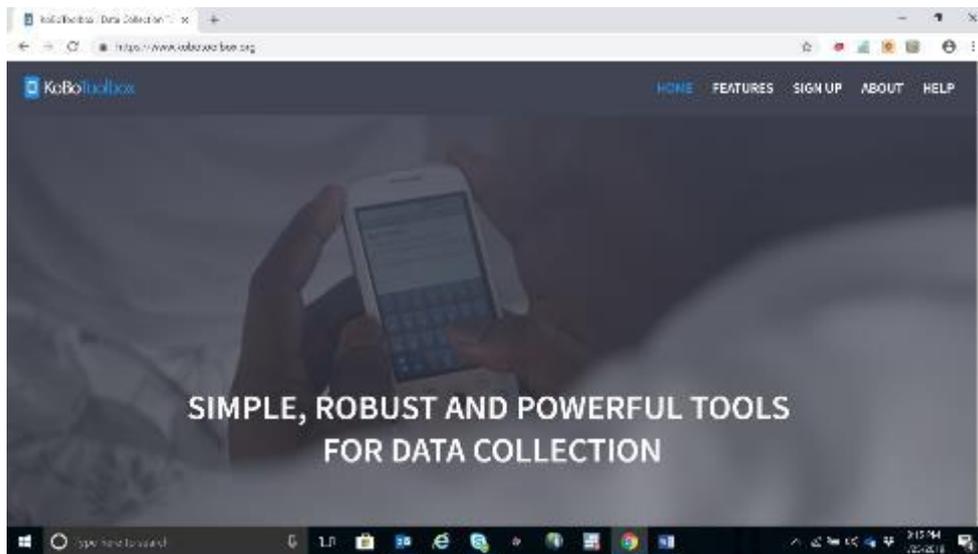
2. Scroll down to the **login** tab: Researchers, aid workers and everyone else
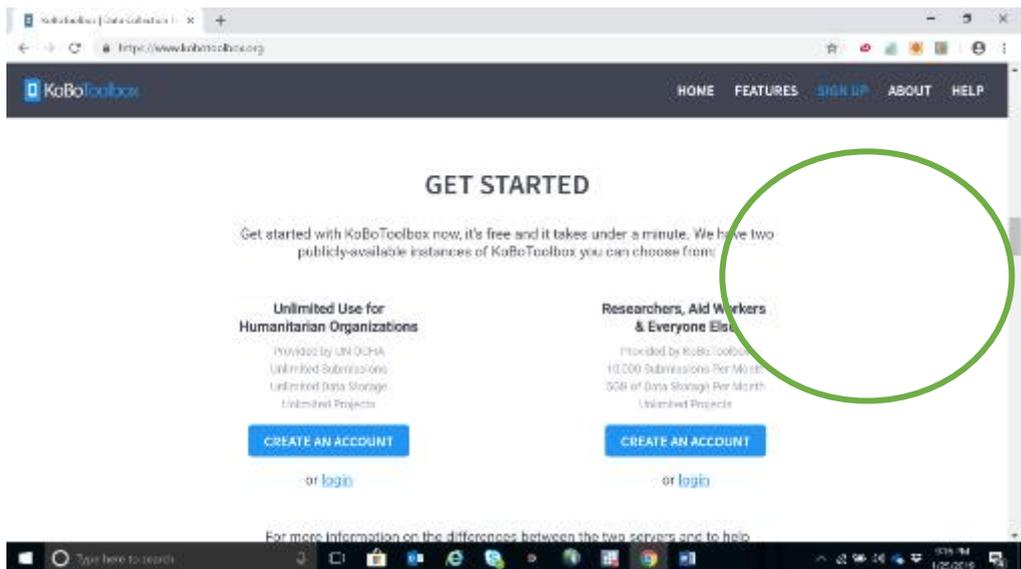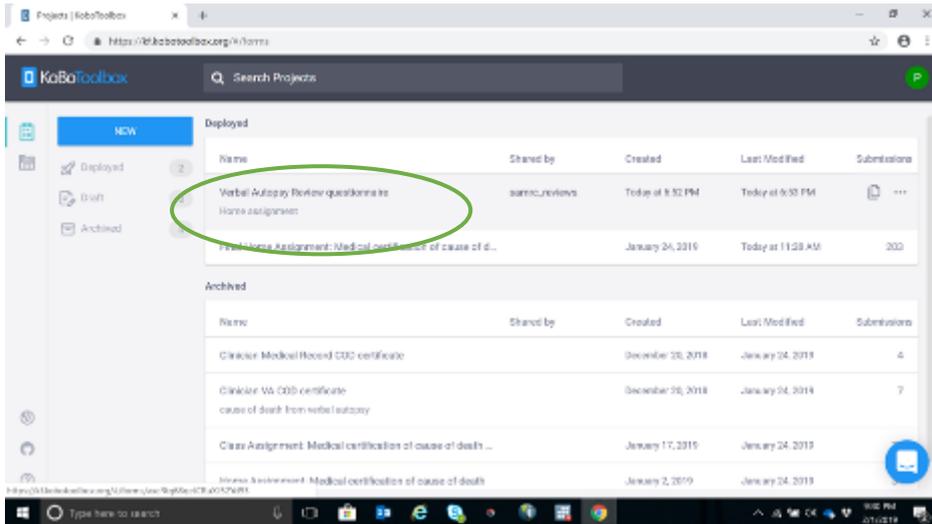

3. Login using Username**: pgroene21** Password: **NCODV**

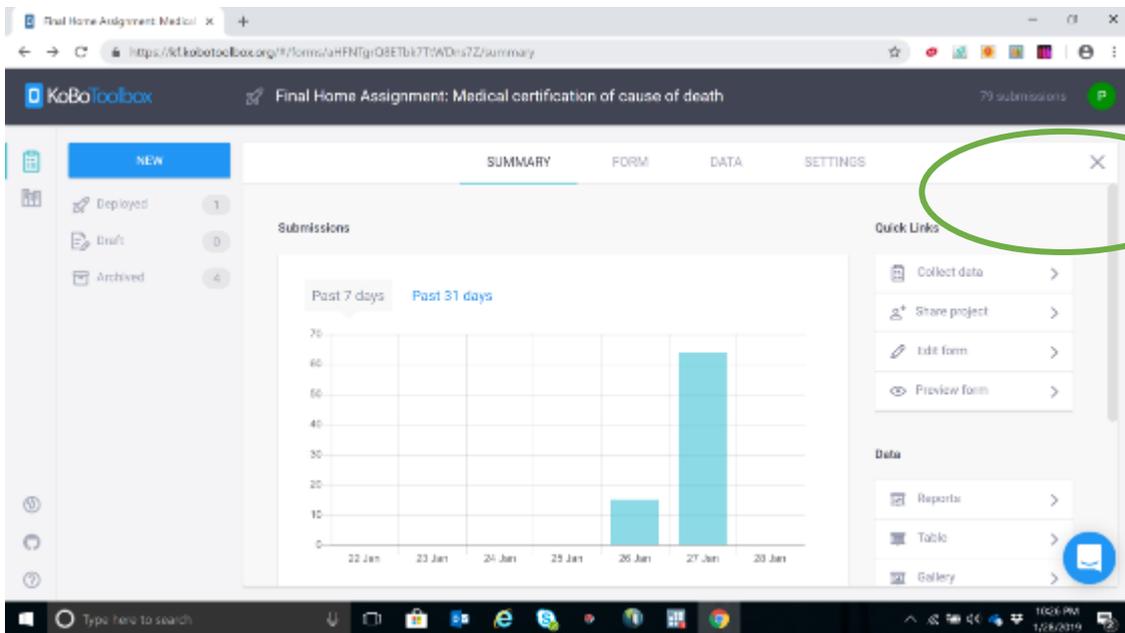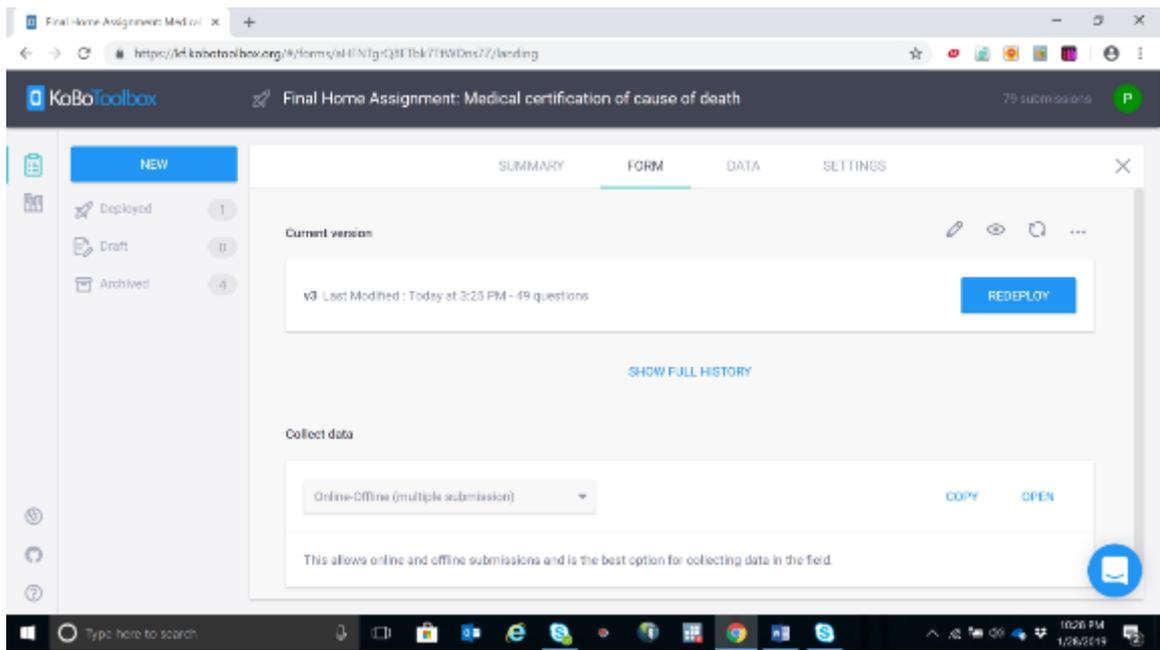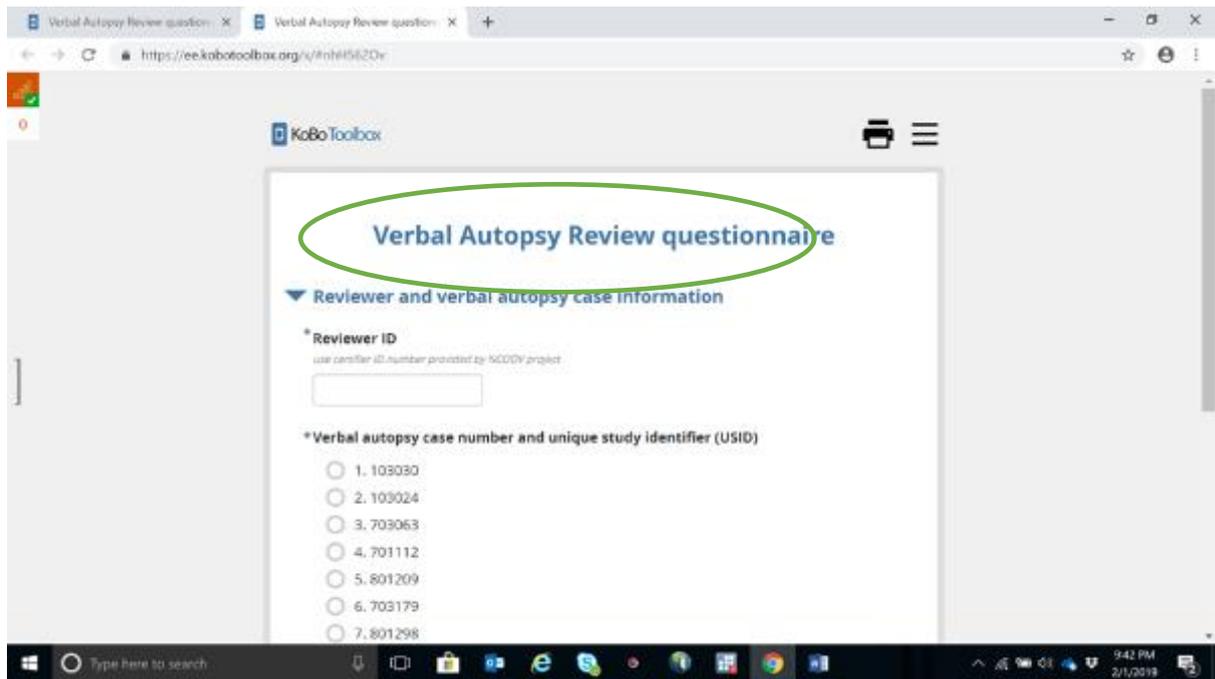4. Select questionnaire named *Verbal autopsy review questionnaire*

5. Right side of the screen under quick links select the tab: **Collect data**

6. Scroll down, in the bottom right hand corner click: **open**

7. Insert your **Certifier ID** and select **Verbal autopsy Case number 1**

8. Duration between onset of conditions and death
   - If immediate select: **0** and minutes as unit.
   - Unknown duration select: **9999** for the duration and select the appropriate unit eg. If you know that it was a number of years, select **9999** for duration and select **years** for the unit.
   -
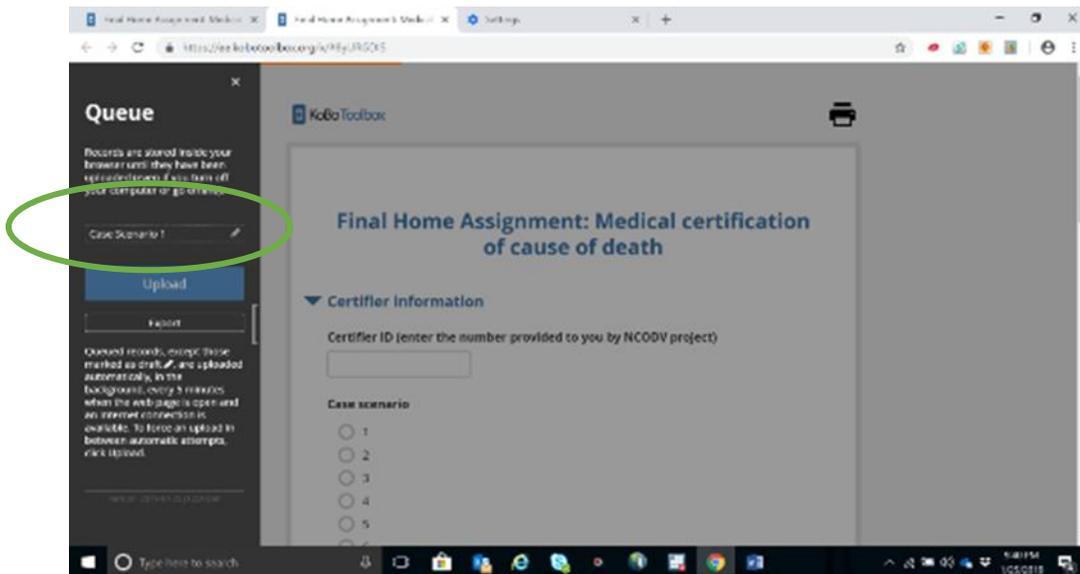9. Once you have completed the form tick: **Save as Draft**
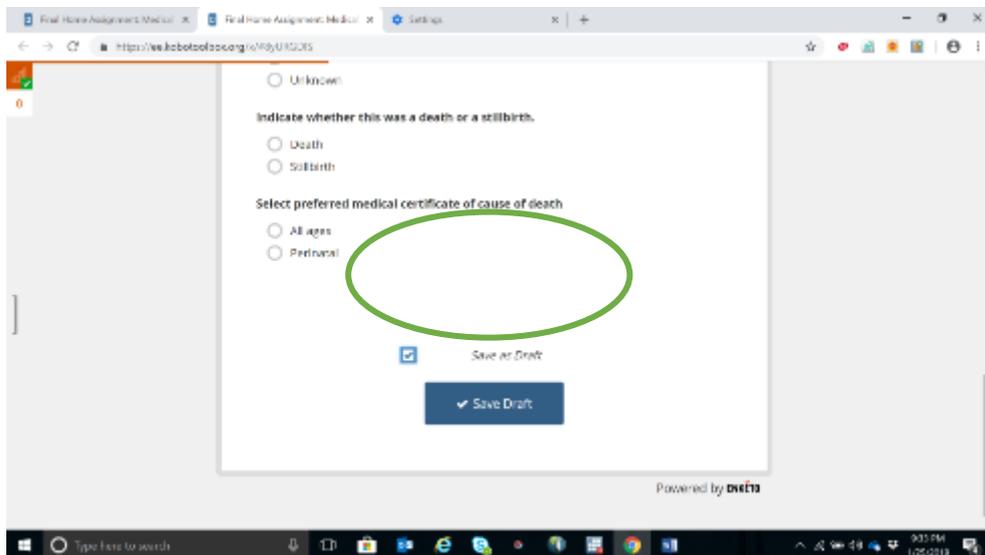
10. Insert the Record name using the Verbal autopsy case number ex. **VA Case 1**
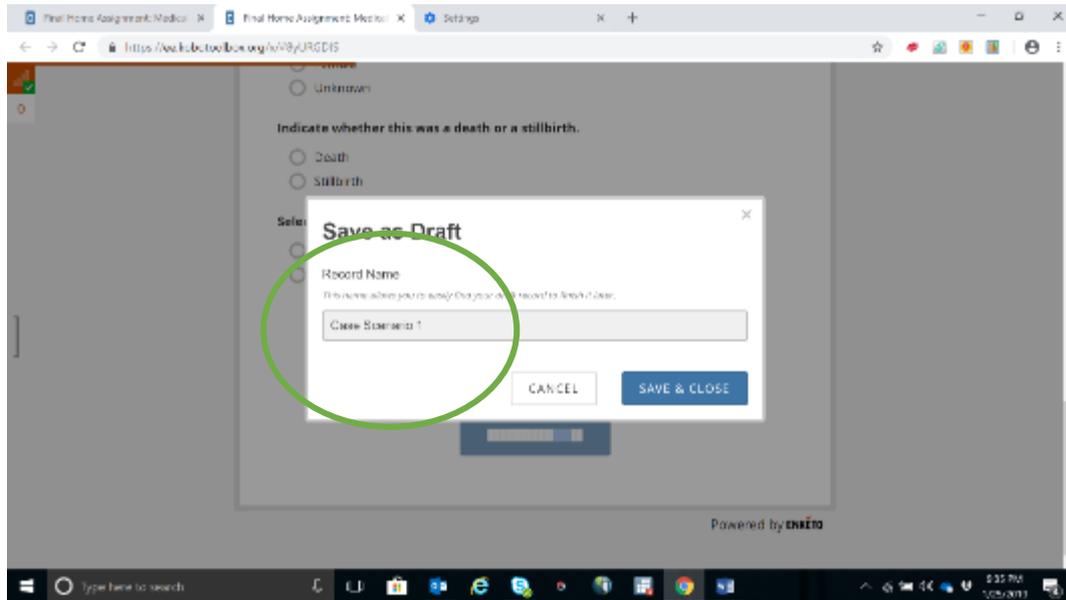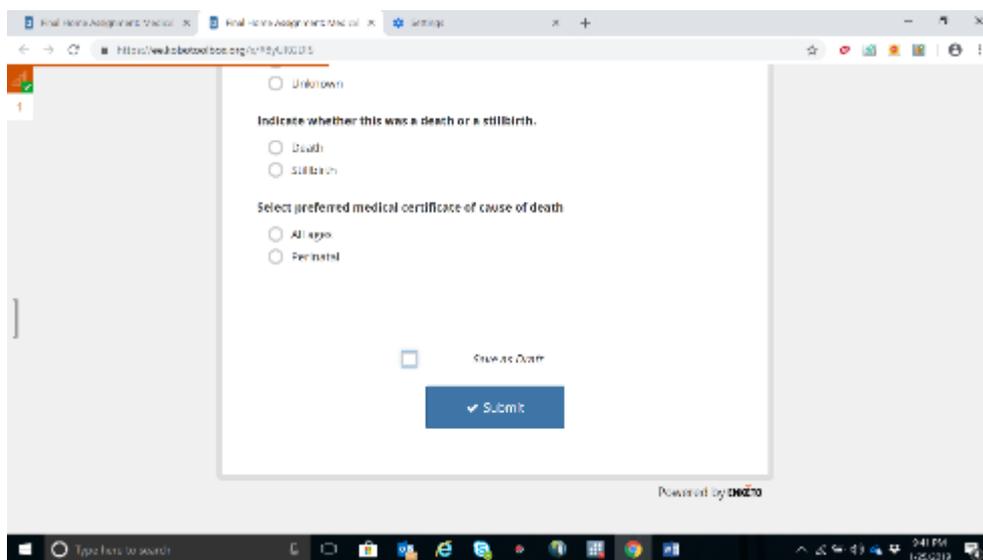

11. If you are happy with your answers and want to submit: Click on the number in top left hand corner (**Records queued**) to open the record saved as draft.

12. Click on the record displayed in the Queue to open it

13. Go to the end of the record, **untick** the Save as draft and then click **Submit**

14. Continue until all 13 case scenarios have been completed and submitted.

15. The total number case scenarios will still be queued in the top right-hand corner, click on the number. A drop down column will appear listing all the cases. Click on the **upload** button at the bottom of the column.

Accessing the VA review form on tablet

For the reviewers having trouble getting the VA review form on Kobocollect using the tablet. It is the tablet server setting.
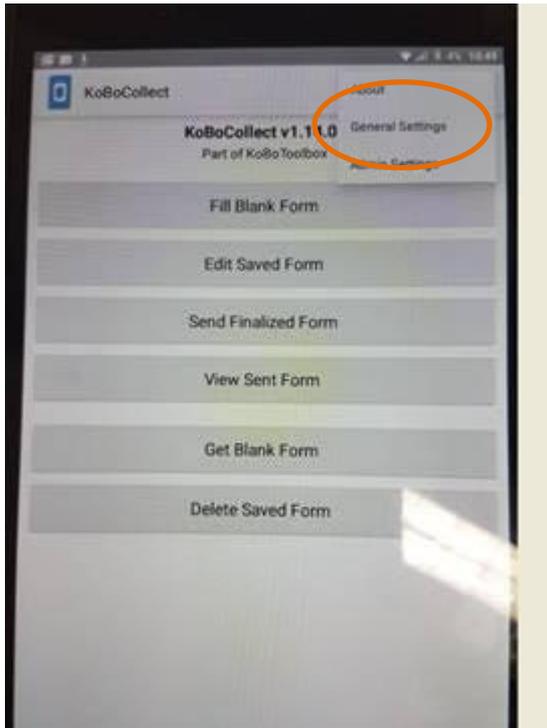
4 April 2019

Step by Step instructions to access VA review form

Only for those who are having trouble accessing the VA review form on the tablet (Kobocollect)
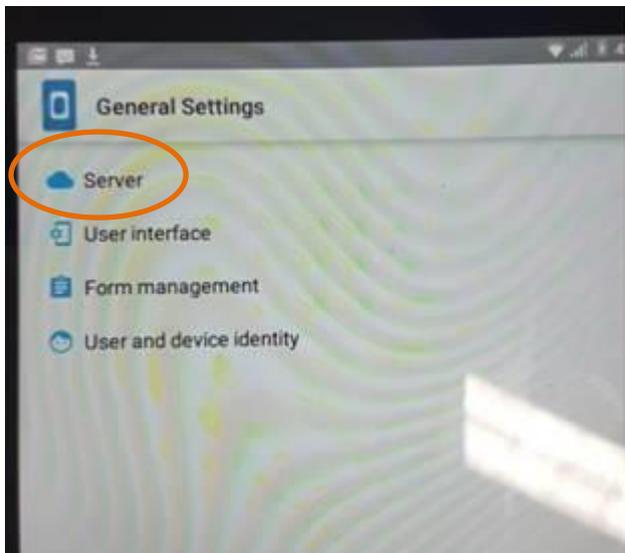
1. Go to General Settings – click on the three vertical little dots top right hand –
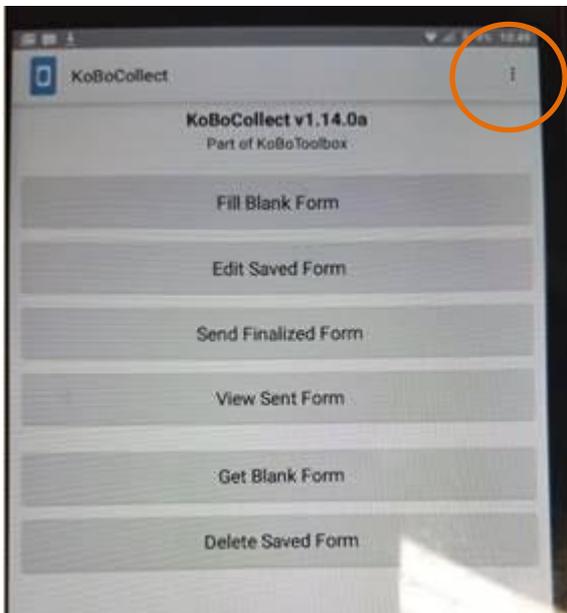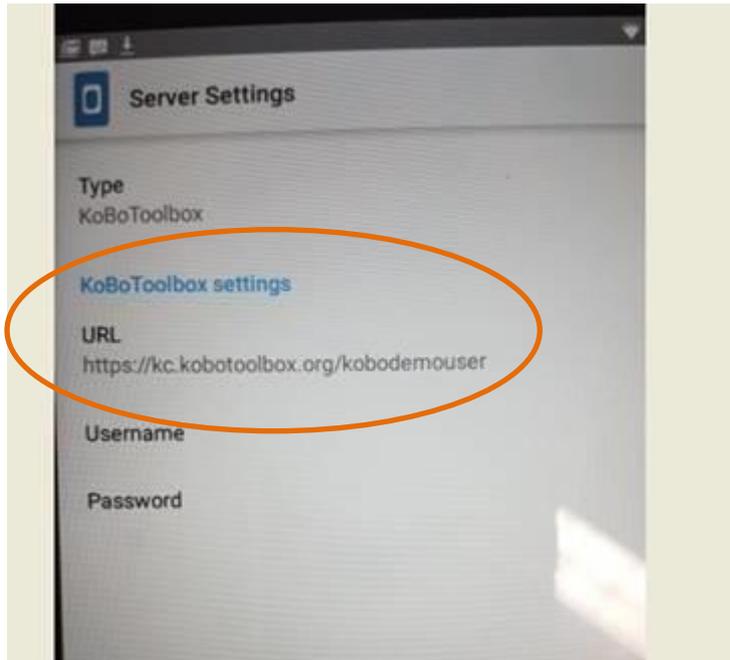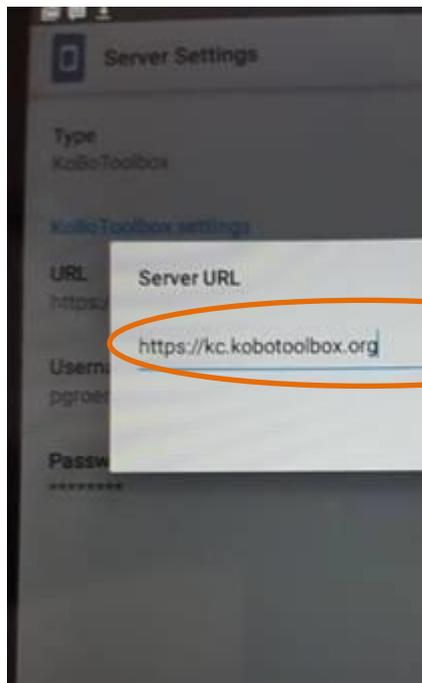

2. Click on General Settings

3. Click on Server

4. If you see the following, it is incorrect:

5. Under <u>URL link should **not** contain /kobodemouser</u>. This points to the wrong server and should be removed. Click on the server name to change. **Simply backspace to remove /kobodemouser**. Server name should look like this

Backspace /kobodemouser

6. Type **in Username** and **password:**

7. return to main screen and refresh and download form (Get Blank Form/Tick form you need/Refresh