



# Ohio AOT Program Data Entry User Guide

## OVERVIEW

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This guide is intended to provide instruction for use of the assisted outpatient treatment (AOT) participant tracking form. The guide is for county AOT Monitors or other individuals tasked with participant tracking, data entry, or reporting for the AOT civil commitment programs in Ohio.

The Ohio AOT Program Data Portal can be found on the Ohio Department of Mental Health and Addiction Services [webpage](#).

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## DATA ENTRY OVERVIEW

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This page serves as a general overview of how to use the data entry tool.

Each county will have access to their own data and be able to create reports from their own information. Any reporting that is shared with the AOT Monitors Work Group or elsewhere will be done in aggregate. No protected health information will be shared with outside county programs or partners.

1. **New AOT participant enrollment** – This page should be used to start a new AOT participant in the system and for returning participants beginning another outpatient commitment. This page includes enrollment and participant demographic information.
2. **Enter participant information for 12-months prior to AOT enrollment** – This page should be used to enter data for history of an AOT participant’s 12-months prior to enrollment into the program. This page includes data entry fields for health care service utilization, arrests, and housing status.
3. **Monthly participant tracking** – This page should be used to track AOT participant data during enrollment in the program to be filled out monthly. This page includes data entry fields for crisis contacts, number of AOT contacts, and housing status. This page can also be used to track variables post-AOT enrollment monthly.
4. **Participant event tracking** – This page should be used to track AOT participant data during enrollment in the program to be filled out after an event occurs. This page includes the ability to enter data for an arrest, psychiatric hospitalization, eviction, court-ordered medication or evaluation, and housing movements. In addition, this page can be used to acknowledge a termination of an AOT order. This page should also be used to track post-AOT enrollment outcomes.
5. **Data entry error** – This page should be used to notify the system administrators of a data entry error. Reporting data entry errors facilitates cleaner and more accurate reports.
6. **Feedback on data collection tool** – This page provides an opportunity to give feedback on the data collection tool itself. Any feedback on the data points of interest, ease-of-use, language or definitions of data points are welcome.
7. **Link to user guide and data definitions** – This will link to a page on the Treatment Advocacy Center’s website that will have this user guide and data definitions. You will also find a link to the Ohio AOT Implementation Tool-kit on this page.

## NEW AOT PARTICIPANT ENROLLMENT (SURVEY 1)

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When a new AOT participant is enrolled into the program, this page will be used to enter the person’s individual-level characteristics, including dates of when the commitment was initiated, who referred the individual and basic demographic information. All protected health information will be removed for aggregate reporting purposes and only shared with those who have access.

Variable	Definition
Record ID	Unique assigned AOT participant ID; Record ID is unique identifier to individual. If re-commitment, use original Record ID. Use county identifier as first two numerals of ID.
AOT Monitor location	County of AOT program; Used for reporting and data access purposes.
Name	Name of AOT participant (Last, First).
Referral source	Source of referred participant (Inpatient physician, Family member, Outpatient physician, or Other); If other, please indicate source.
Date of initial commitment	Date (MM/DD/YYYY) civil commitment court hearing in hospital or probate court.
Date of outpatient commitment program start	Date (MM/DD/YYYY) of step-down to or start of outpatient program
Age at enrollment	Age of participant at enrollment.
Sex	Sex of participant at enrollment (Male, Female, Other).
Race	Race of participant at enrollment (White, Black/African American, American Indian/Alaskan Native, Asian, Native Hawaiian/Pacific Islander, Other).
Ethnicity	Ethnicity of participant at enrollment (Hispanic/Latino, Non-Hispanic/Latino).

## DATA ENTRY FOR 12-MONTHS PRIOR AOT ENROLLMENT (SURVEY 2)

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This page should be used to enter data regarding a participant’s experience 12-months prior to enrollment in the AOT program. This information should be sourced from a participant’s case management, criminal justice and medical history and be as complete and accurate as possible. Each data entry is looking for the number of contacts or events in the 12-months prior to the initial outpatient commitment start date.

Variable	Definition
Crisis contacts (PES, Mobile crisis, Hospital ED)	Number of encounters of AOT participant with crisis services in 12-months prior to AOT, including visits to psychiatric emergency rooms, crisis center visits, hospital emergency departments and contacts with mobile crisis teams.
Psychiatric hospitalization episodes	Number of inpatient psychiatric hospitalizations of AOT participant in 12-months prior to AOT.
Number of days in the hospital	Total number of days of inpatient psychiatric hospitalization of AOT participant in 12-months prior to AOT.
Numbers of arrests	Number of arrests of AOT participant in 12-months prior to AOT.
Housing status	Housing status of participant in 12-months prior to AOT (Mostly housed, mostly unstable housing, mostly not-housed); Use your discretion to make best approximation.
Number of movements to less stable housing	Total number of evictions from housing during 12-months prior to AOT.
Number of movements to less restrictive housing	Total number of movements to less restrictive housing of AOT participant in 12-months prior to AOT, including from inpatient hospital to residential treatment or independent living.

## MONTHLY PARTICIPANT TRACKING (SURVEY 3)

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This page should be used to track all AOT participant’s progress while enrolled in the program. This page should be filled out monthly for each participant enrolled, even if the participant is not enrolled for the full tracking month. This page should also be used to track participant’s crisis contacts and housing status for the 12-months following termination of AOT on a monthly basis. Not all county programs utilize participant contacts with Judge or Magistrate or the AOT monitor, if not applicable just leave blank.

<b>Variable</b>	<b>Definition</b>
Reporting month	The calendar month for reporting this data.
Reporting year	The calendar year for reporting this data.
Crisis contacts (PES, Mobile crisis, Hospital ED)	Number of encounters of AOT participant with crisis services during tracking month, including visits to psychiatric emergency rooms, crisis center visits, hospital emergency departments and contacts with mobile crisis teams.
Housing status	Housing status of participant during reporting month (Mostly housed, mostly unstable housing, mostly not-housed); Use your discretion to make best approximation.
Number of formal hearings with Judge or Magistrate	Total number of formal hearings with AOT Judge or Magistrate during reporting period.
Number of informal contacts with Judge or Magistrate	Total number of informal contacts (i.e., status meetings) with Judge or Magistrate during reporting period.
Number of contacts with AOT monitor	Total number of formal or informal contacts with AOT monitor during reporting period.

## PARTICIPANT EVENT TRACKING (SURVEY 4)

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This page is designed to allow you to track participant events that are relatively infrequent, as they occur. This should be done for individuals currently enrolled in the AOT program and for those that are being followed-up with post-enrollment for 12-months. This page should also be used to acknowledge when an individual is terminated from the AOT program due to graduation, commitment ending, or other reason. Each event will lead you to another page where you can indicate the date the event occurred and submit any notes about the event or participant.

<b>Variable</b>	<b>Definition</b>
Commitment status	Reporting on an ongoing commitment for individual currently enrolled in AOT or for post-AOT enrollment tracking.
Arrest	New arrest.
Eviction	New eviction from housing.
Hospitalization	New inpatient psychiatric hospitalization.
Court-ordered medication	New court order for medication over objection.
AOT termination	Report a termination of AOT participant.
Court-ordered evaluation	New court-ordered evaluation.
Movement to less stable housing	New movement to less stable form of housing.
Movement to less restrictive housing	New movement to less restrictive housing of AOT participant, including from inpatient hospital to residential treatment or independent living.
Other	Any other event the AOT Monitor would like to track.

## POST-ENROLLMENT TRACKING

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AOT participants should continue to be monitored for the 12-months following termination from the program. This data collection and monitoring will allow county programs to determine efficacy of their current program operations and have the ability to make results-driven improvements. In addition, this data will be used to measure the effectiveness of AOT programs throughout Ohio to establish best-practices and disseminate those throughout the state and rest of the United States.

To track an AOT participant post-enrollment, please be sure to complete the following steps:

1. Create an event report of termination for the AOT participant (page 6 – Survey 4), including the date of termination.
2. Create a monthly report of post-enrollment participant (page 5 – Survey 3), for each of the 12-months post-enrollment, tracking the individual's housing status and crisis contacts.
3. Utilize the event tracking form (page 6 – Survey 4), to report any events for the participant for the 12-months post-enrollment.

## DATA ENTRY ERROR (SURVEY 5)

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This page should be used to report a data entry error that occurred while submitting any data for the AOT monitor tracking. This page allows you to report the data entry error to the system administrators and helps to ensure accuracy of the reports.

To report a data entry error, please complete the following steps:

1. Create a new data form with the correct data.
2. Fill out the data entry error form.
  - a. Indicate what form the error was made on.
  - b. Briefly describe the error so the system administrator can correct the mistake.
  - c. Record date and approximate time of data entry error so the system administrator can find the incorrect report.

## CREATING REPORTS

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Reporting based on data entered for your AOT Monitor Location will be available as soon as the submit button has been clicked. The next few pages will describe and detail how you can access your participant level data and basic reports based on variables of interest.

All reporting will be available through the OhioMHAS SNAP WebHost at:

<https://qprdata.mha.ohio.gov/snapwebhost>

AOT Monitors can access this website using a unique username and password which will be provided by OhioMHAS and linked to their official email account for AOT.

- 1) [Logging into OhioMHAS SNAP WebHost](#)
- 2) [Select the survey you would like to create a report for by clicking on the correct link.](#)

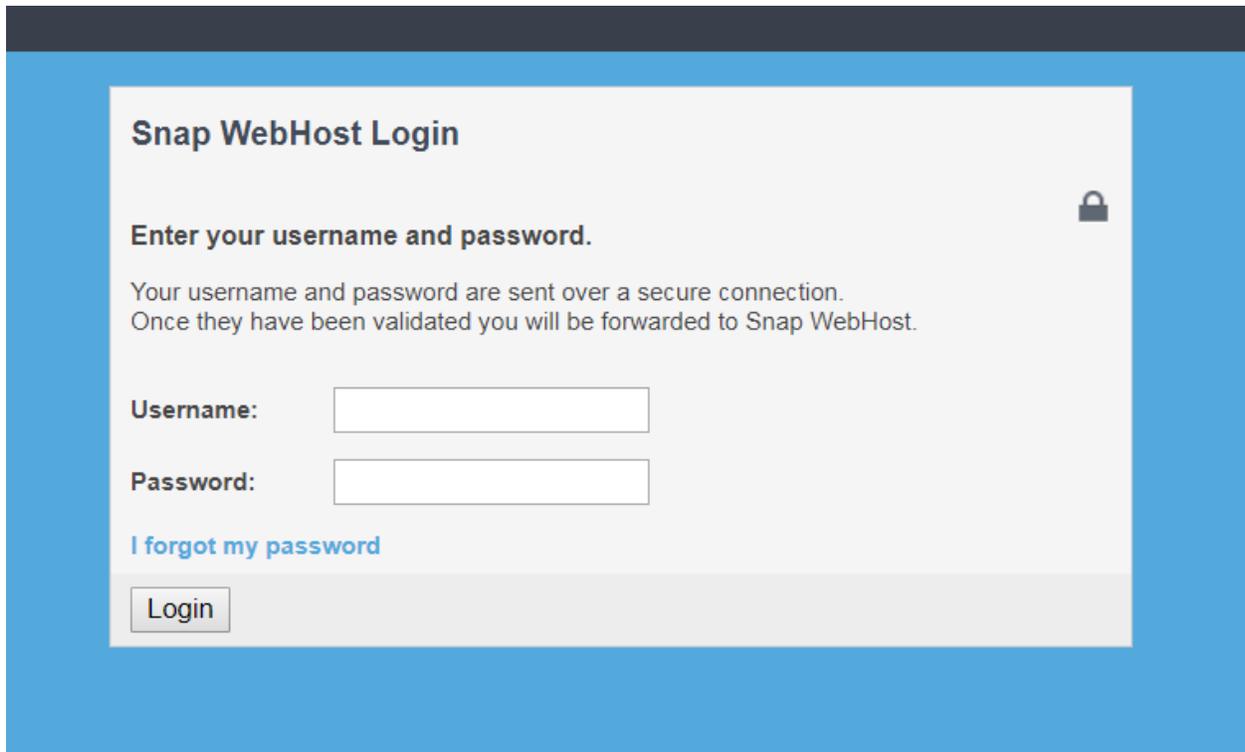
NOTE: Surveys are numbered in the WebHost using the same numbers as this guide and the Data Portal (e.g. AOT\_1 will be the New AOT Participant Enrollment survey and reporting and AOT\_3 will be the Monthly Participant Tracking).

- 3) [Three options for viewing the data that you have entered:](#)
  - a. [download a filtered CSV file](#)
  - b. [run one of the existing reports or analyses](#)
    - i. Lists
    - ii. Tables
  - c. [create a custom analysis](#)
    - i. Types of analyses
    - ii. Analysis and Break Variables
    - iii. Suppressing Zeros
    - iv. Transposing Display
- 4) [Adding a filter to a report to limit visible information:](#)
  - a. [RecordID](#)
  - b. [Dates](#)
  - c. [Custom](#)

## Logging into OhioMHAS SNAP WebHost

Go to: <https://qprdata.mha.ohio.gov/snapwebhost>

You will see this:



**Snap WebHost Login**

Enter your username and password.

Your username and password are sent over a secure connection.  
Once they have been validated you will be forwarded to Snap WebHost.

**Username:**

**Password:**

[I forgot my password](#)

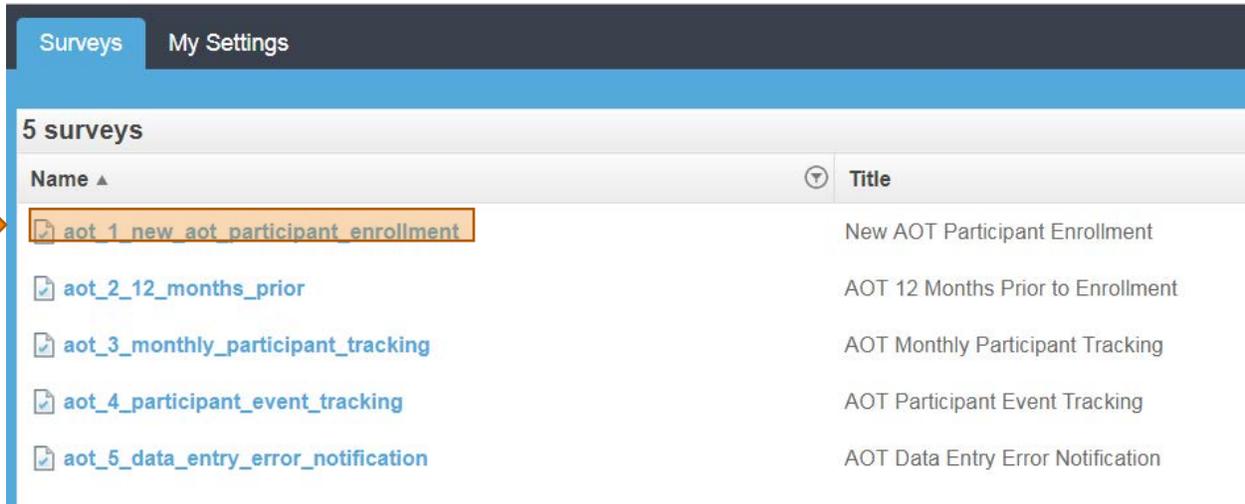
Type in your username and password, then click “Login” or hit “Enter”

Select the survey you would like to create a report for:

Surveys		My Settings
5 surveys		
Name ▲	▼ Title	
 <a href="#">aot_1_new_aot_participant_enrollment</a>	New AOT Participant Enrollment	
 <a href="#">aot_2_12_months_prior</a>	AOT 12 Months Prior to Enrollment	
 <a href="#">aot_3_monthly_participant_tracking</a>	AOT Monthly Participant Tracking	
 <a href="#">aot_4_participant_event_tracking</a>	AOT Participant Event Tracking	
 <a href="#">aot_5_data_entry_error_notification</a>	AOT Data Entry Error Notification	

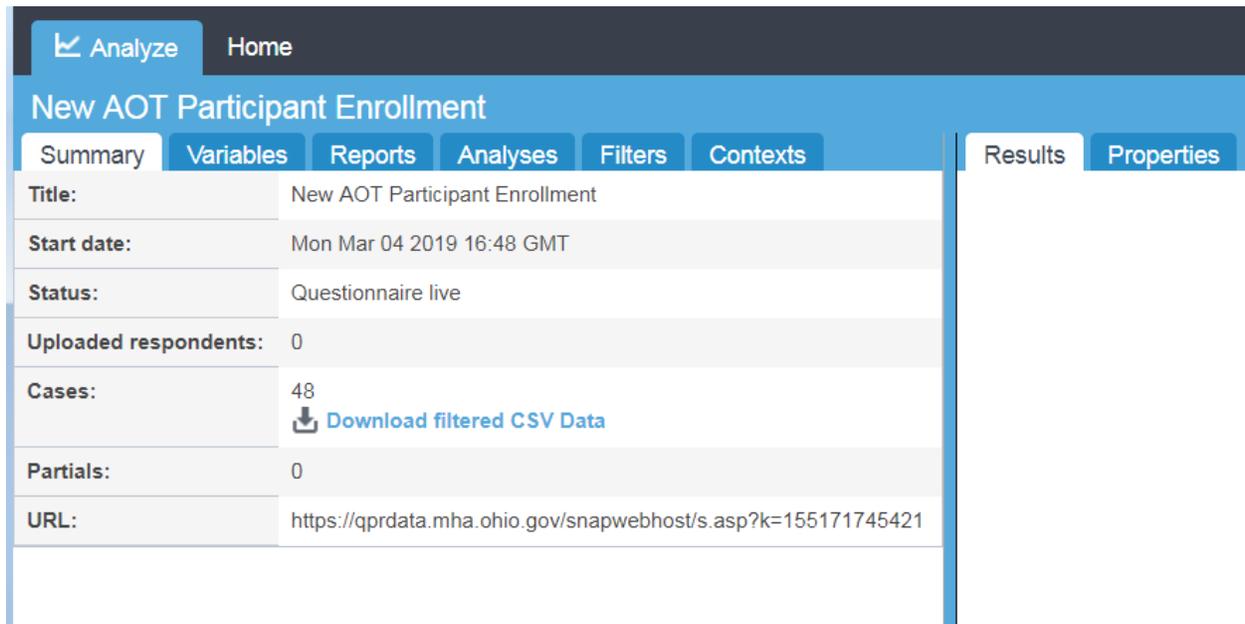
## Reporting Options for Viewing Data

For this demonstration/example we are going to use the first survey “New AOT Participant Enrollment”. Please select the “aot\_1\_new...” survey by clicking the blue hyperlink under “Name”.



Name ▲	Title
<a href="#">aot_1_new_aot_participant_enrollment</a>	New AOT Participant Enrollment
<a href="#">aot_2_12_months_prior</a>	AOT 12 Months Prior to Enrollment
<a href="#">aot_3_monthly_participant_tracking</a>	AOT Monthly Participant Tracking
<a href="#">aot_4_participant_event_tracking</a>	AOT Participant Event Tracking
<a href="#">aot_5_data_entry_error_notification</a>	AOT Data Entry Error Notification

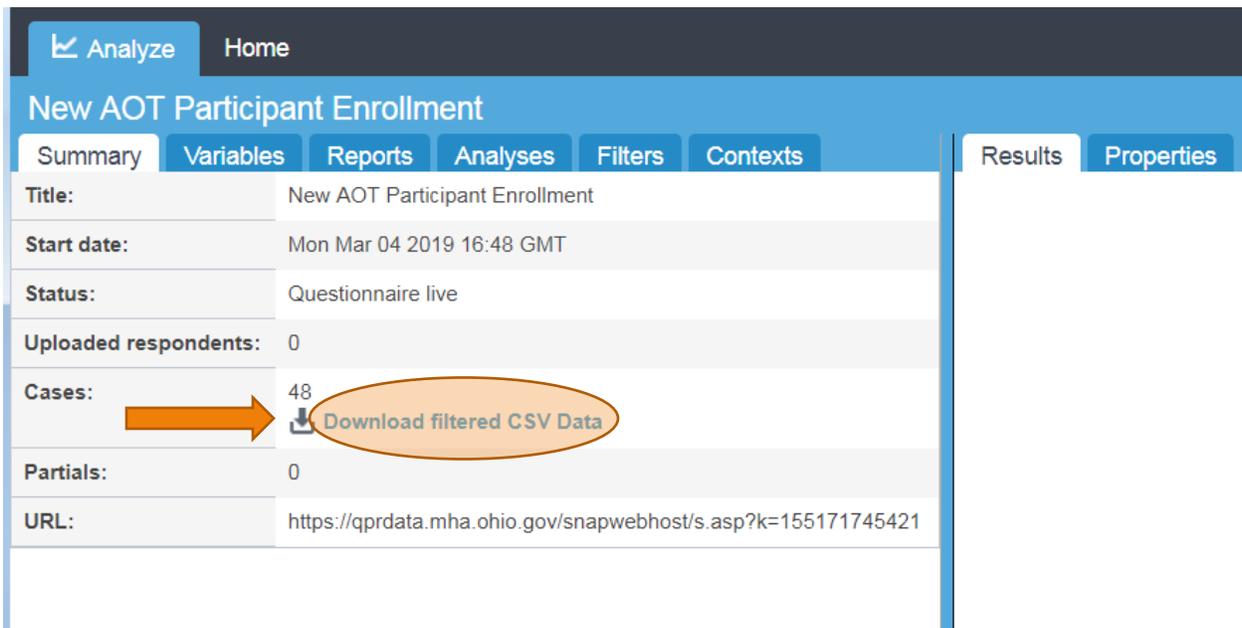
You will now see the following screen. Please notice the tabs on the top and the middle of the screen.



New AOT Participant Enrollment							
Summary	Variables	Reports	Analyses	Filters	Contexts	Results	Properties
Title:	New AOT Participant Enrollment						
Start date:	Mon Mar 04 2019 16:48 GMT						
Status:	Questionnaire live						
Uploaded respondents:	0						
Cases:	48 <a href="#">Download filtered CSV Data</a>						
Partials:	0						
URL:	<a href="https://qprdata.mha.ohio.gov/snapwebhost/s.asp?k=155171745421">https://qprdata.mha.ohio.gov/snapwebhost/s.asp?k=155171745421</a>						

## Downloading a .CSV file with your data from SNAP WebHost

Click the blue link that says “Download filtered CSV Data”

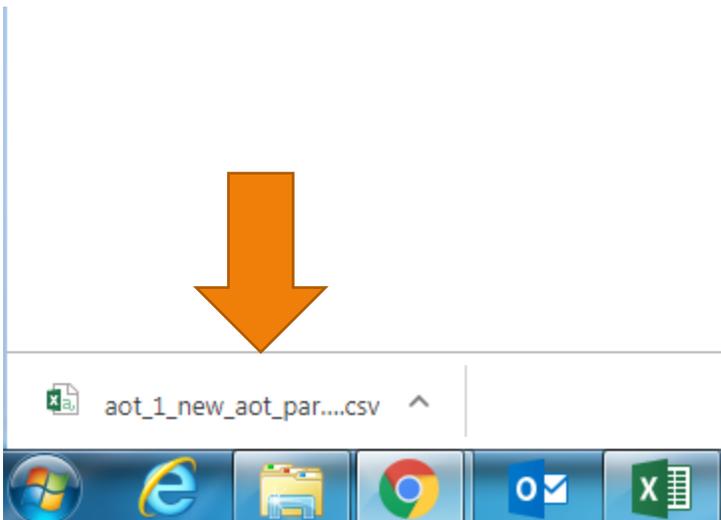


The screenshot shows the SNAP WebHost interface for a 'New AOT Participant Enrollment'. The 'Summary' tab is active, displaying the following information:

Field	Value
Title:	New AOT Participant Enrollment
Start date:	Mon Mar 04 2019 16:48 GMT
Status:	Questionnaire live
Uploaded respondents:	0
Cases:	48
Partials:	0
URL:	https://qprdata.mha.ohio.gov/snapwebhost/s.asp?k=155171745421

The 'Download filtered CSV Data' link is highlighted with an orange oval and an arrow pointing to it.

Depending on your web browser and settings the file will be available for you either within your “downloads” screen or at the bottom of the SNAP WebHost browser window near your Window’s icon.

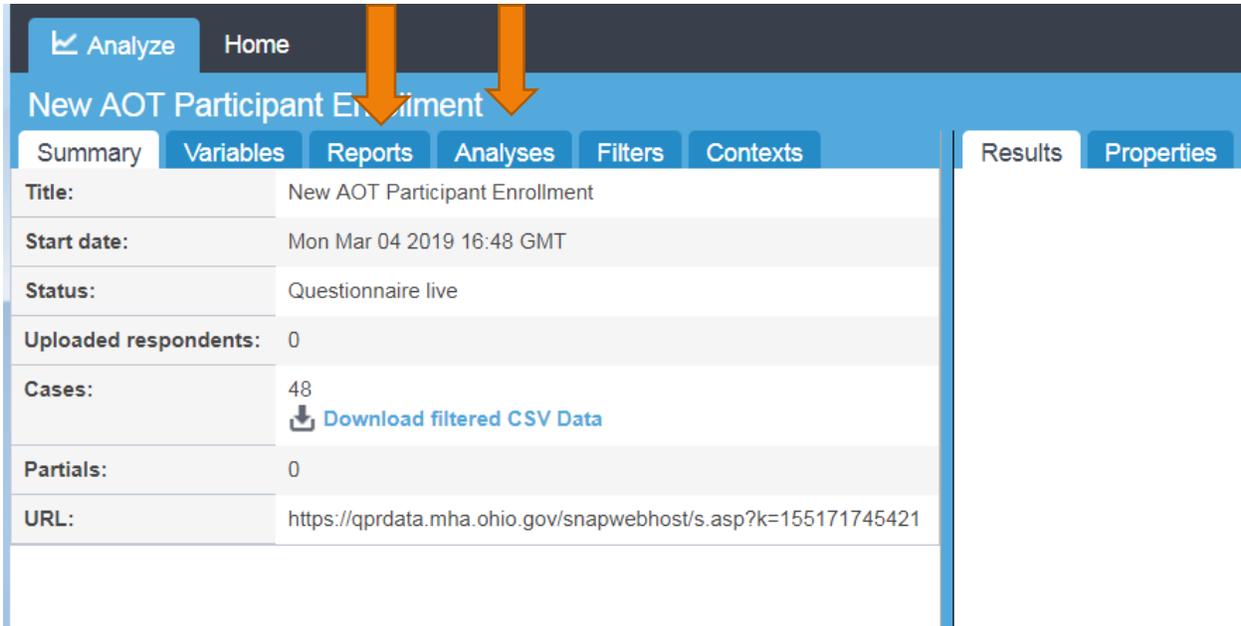


The screenshot shows a Windows taskbar with a large orange arrow pointing down to a file named 'aot\_1\_new\_aot\_par....csv'. The taskbar icons include Internet Explorer, File Explorer, Chrome, Outlook, and Excel.

Double click the file and you should be able to open within an Excel window. If not you will need to change your computer settings to open .csv files within Excel.

## Running existing/pre-built reports and analyses

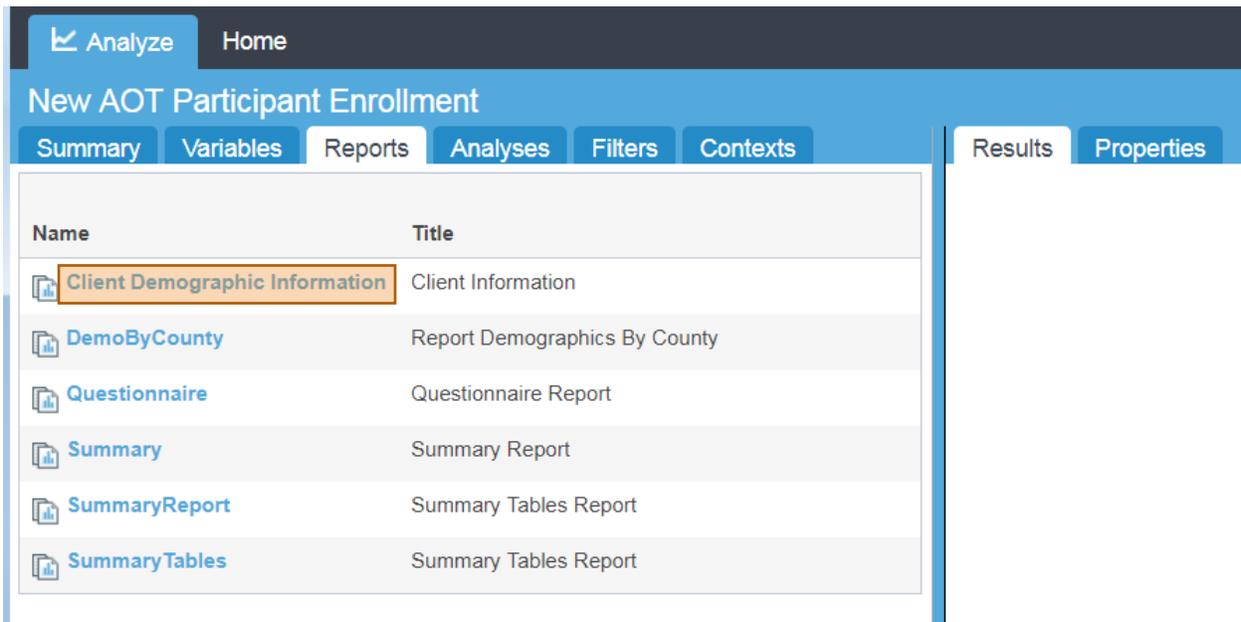
Click the “Reports” or “Analyses” Tab in the middle set of tabs, depending on what you want to view. Some surveys do not contain separate analyses, but all surveys contain at least one report that will be available to you for easy client viewing. For this demonstration please click the “Reports” tab.



The screenshot shows the 'New AOT Participant Enrollment' page. The 'Reports' tab is selected in the middle set of tabs. Two orange arrows point to the 'Reports' and 'Analyses' tabs. The 'Results' and 'Properties' tabs are visible on the right side of the page.

Field	Value
Title:	New AOT Participant Enrollment
Start date:	Mon Mar 04 2019 16:48 GMT
Status:	Questionnaire live
Uploaded respondents:	0
Cases:	48 <a href="#">Download filtered CSV Data</a>
Partials:	0
URL:	https://qprdata.mha.ohio.gov/snapwebhost/s.asp?k=155171745421

Select the “Client Demographic Information” Report by clicking the blue hyperlink.



The screenshot shows the 'New AOT Participant Enrollment' page with the 'Reports' tab selected. The 'Client Demographic Information' report is highlighted with a blue border. The 'Results' and 'Properties' tabs are visible on the right side of the page.

Name	Title
<a href="#">Client Demographic Information</a>	Client Information
<a href="#">DemoByCounty</a>	Report Demographics By County
<a href="#">Questionnaire</a>	Questionnaire Report
<a href="#">Summary</a>	Summary Report
<a href="#">SummaryReport</a>	Summary Tables Report
<a href="#">SummaryTables</a>	Summary Tables Report

The Report will run and can be viewed in the “Results” Tab. This style of report is known as a “List” and allows you to view the data that you have entered.

The screenshot shows the 'Results' tab of the 'New AOT Participant Enrollment' report. The interface includes a navigation bar with 'Analyze' and 'Home' buttons, and a sub-header with 'Summary', 'Variables', 'Reports', 'Analyses', 'Filters', and 'Contexts' tabs. The 'Results' tab is active, displaying a table of participant data. The table has columns for Record ID, Name (Last, First), Race, Sex, Age at enrollment, Who initiated AOT?, and AOT Monitor Location. The data is as follows:

Record ID	Name (Last, First)	Race:	Sex:	Age at enrollment	Who initiated AOT?	AOT Monitor Location
123	Doe, Jane	American Indian or Alaskan Native	Female	22	Outpatient physician	Adams
122	Williams, Fred	White	Female		Family member	Adams
77011	Austin, Jane	White	Female	30	Family member	Adams
77012	King, Steven	White	Male	55	Other	Adams
77013	baldwin, james	Black/African American	Male	33	Outpatient physician	Adams

If you click the “Analyses” tab you will see a few versions of “Tables” and will be able to view data counts.

The screenshot shows the 'Analyses' tab of the 'New AOT Participant Enrollment' report. The interface includes a navigation bar with 'Analyze' and 'Home' buttons, and a sub-header with 'Summary', 'Variables', 'Reports', 'Analyses', 'Filters', and 'Contexts' tabs. The 'Analyses' tab is active, displaying a list of analysis tables. The data is as follows:

Name	Title	Form
Sex By County	AOT Monitor Location by Sex:	Table
Referral Source By County	AOT Monitor Location by Who initiated AOT?	Table
Race By County	AOT Monitor Location by Race:	Table
Ethnicity By County	AOT Monitor Location by Ethnicity	Table

On the right side of the 'Analyses' tab, there is a 'Results' section with a 'Properties' sub-tab. This section displays a summary table of counts:

Counts Respondents	Total	Sex:	
		Female	Male
Base	5	3	2
AOT Monitor Location			
Adams	5	3	2

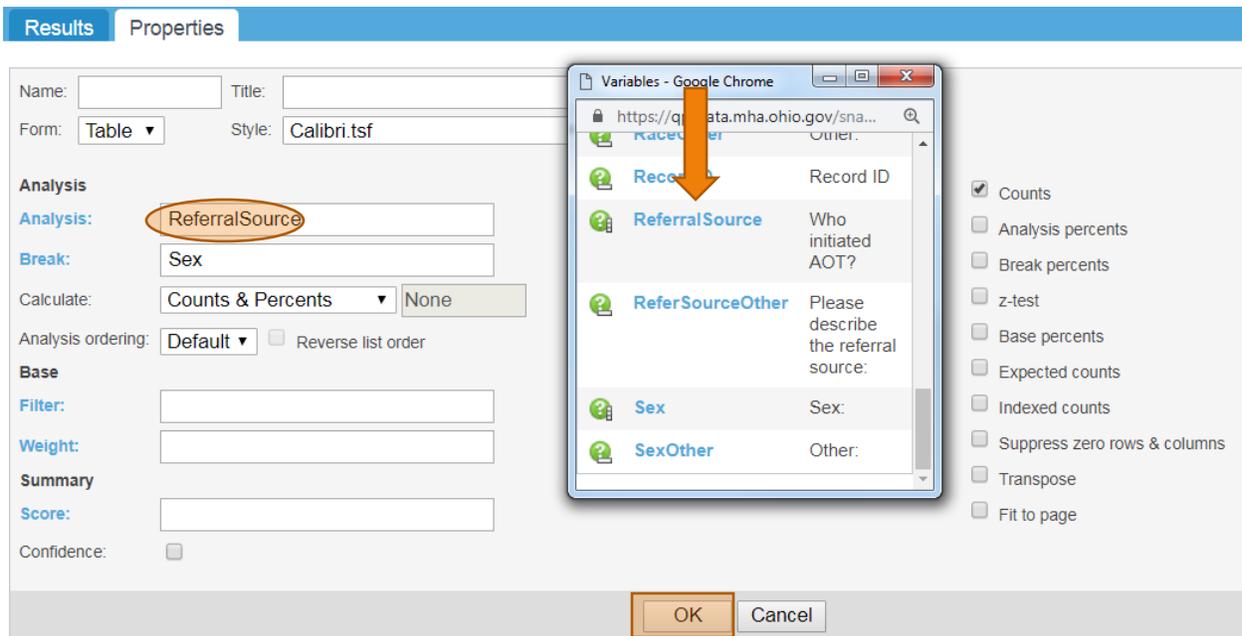
## Customizing analyses

This is a version of the Sex By County Analyses and can be altered using the “Properties” tab. Click the “Properties” tab.

Counts Respondents	Total	Sex:	
		Female	Male
Base	5	3	2
<b>AOT Monitor Location</b>			
Adams	5	3	2

You will get a display that shows the basics to create this table. You can use this to tailor your tabular results. For example, if you are only in one MonitorLocation (as is the case with this example being “Adams” county only) you can change the “Analysis” variable by clicking on the “Analysis” link and selecting a different variable.

For this example, we will delete “Monitor Location” and select “Referral Source” by clicking it from the “Variable” listing.



To run the report, click “OK”. The results will now be displayed with referral sources and sex.

Counts Respondents	Total	Sex:	
		Female	Male
Base	5	3	2
Who initiated AOT?			
Outpatient physician	2	1	1
Family member	2	2	0
Inpatient physician	0	0	0
Other	1	0	1

If you decide that you don’t want to see zeros and you would like this table to have Sex as rows instead of column headers, you can make a quick adjustment to the properties by checking the boxes for “Suppress zero rows & columns” and “Transpose”.

**Results** **Properties**

Name:  Title:

Form: **Table** Style: **Calibri.ttf**

**Analysis**

Analysis:

Break:

Calculate: **Counts & Percents**

Analysis ordering: **Default**  Reverse list order

**Base**

Filter:

Weight:

**Summary**

Score:

Confidence:

- Counts
- Analysis percents
- Break percents
- z-test
- Base percents
- Expected counts
- Indexed counts
- Suppress zero rows & columns
- Transpose
- Fit to page

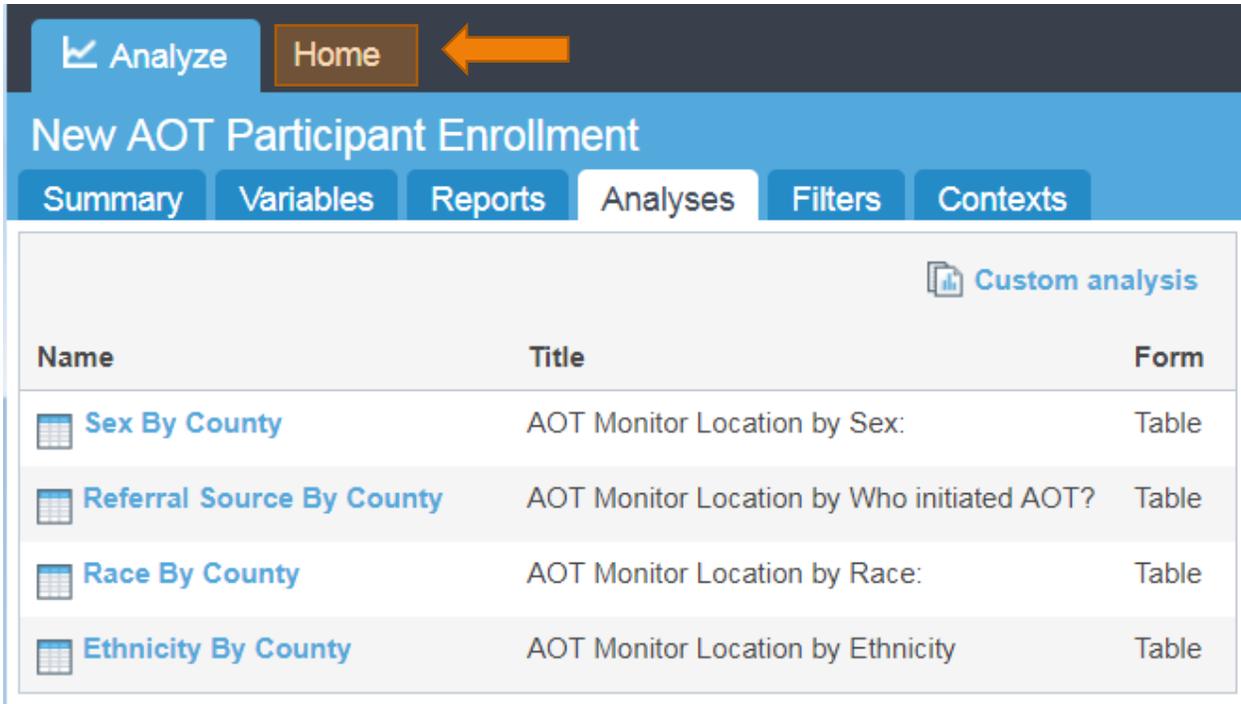
After clicking those selections and clicking "OK" you will get the following display.

**Results** **Properties**

Counts Respondents	Base	Who initiated AOT?		
		Outpatient physician	Family member	Other
<b>Total</b>	<b>5</b>	<b>2</b>	<b>2</b>	<b>1</b>
<b>Sex:</b>				
<b>Female</b>	<b>3</b>	<b>1</b>	<b>2</b>	<b>0</b>
<b>Male</b>	<b>2</b>	<b>1</b>	<b>0</b>	<b>1</b>

## Using Filters to find specific information

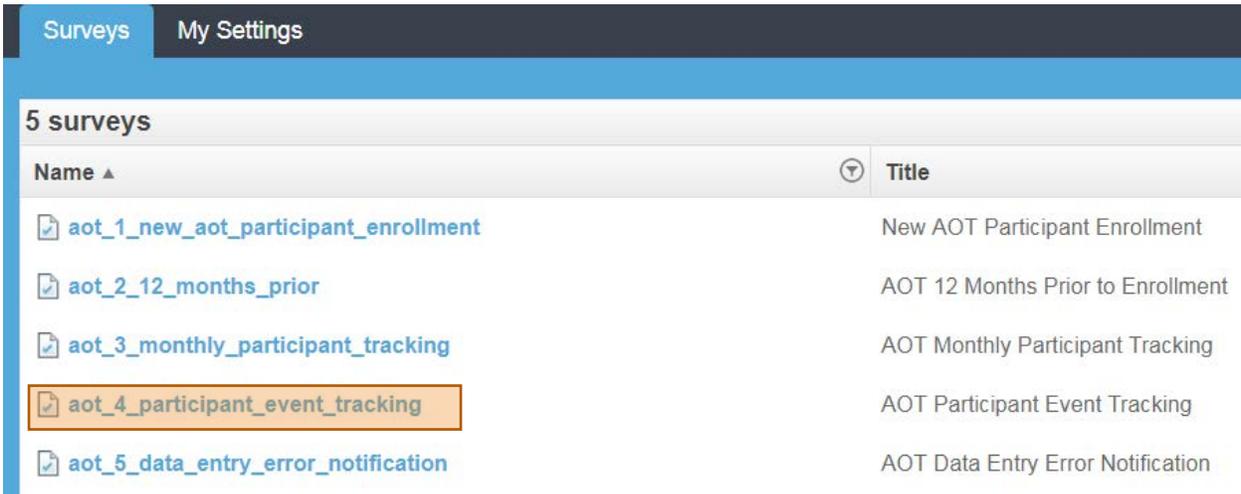
Let's use a different survey to demonstrate the helpfulness of "Filters". We first need to get back to the page with all available surveys. Click the word "Home" in the first level of tabs.



The screenshot shows the 'New AOT Participant Enrollment' page. At the top, there are two tabs: 'Analyze' and 'Home'. The 'Home' tab is highlighted with an orange border and an orange arrow points to it from the right. Below this, there is a blue header with the title 'New AOT Participant Enrollment'. Underneath the header, there are several tabs: 'Summary', 'Variables', 'Reports', 'Analyses', 'Filters', and 'Contexts'. The 'Filters' tab is currently selected. Below the tabs, there is a section for 'Custom analysis' with a table listing four analyses. Each analysis has a small grid icon to its left.

Name	Title	Form
 Sex By County	AOT Monitor Location by Sex:	Table
 Referral Source By County	AOT Monitor Location by Who initiated AOT?	Table
 Race By County	AOT Monitor Location by Race:	Table
 Ethnicity By County	AOT Monitor Location by Ethnicity	Table

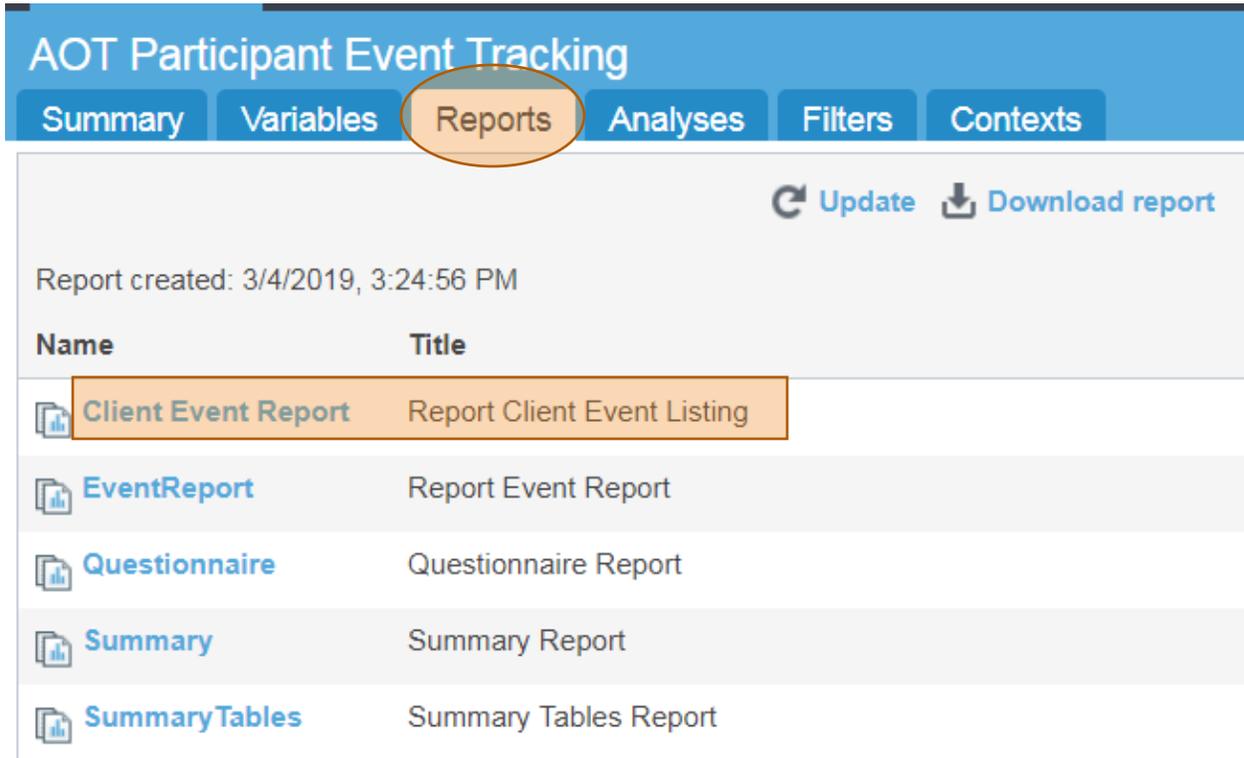
You will return to the survey selection screen. On this screen we will select the fourth option, "Participant Event Tracking" survey.



The screenshot shows the 'Surveys' selection screen. At the top, there are two tabs: 'Surveys' and 'My Settings'. The 'Surveys' tab is selected. Below the tabs, there is a blue header with the title '5 surveys'. Underneath the header, there is a table listing five surveys. Each survey has a small grid icon to its left. The fourth survey, 'aot\_4\_participant\_event\_tracking', is highlighted with an orange box.

Name ▲	Title
 aot_1_new_aot_participant_enrollment	New AOT Participant Enrollment
 aot_2_12_months_prior	AOT 12 Months Prior to Enrollment
 aot_3_monthly_participant_tracking	AOT Monthly Participant Tracking
 aot_4_participant_event_tracking	AOT Participant Event Tracking
 aot_5_data_entry_error_notification	AOT Data Entry Error Notification

Once you are in the Participant Event Tracking survey, click the “Reports” Tab and the “Client Event Report”



The screenshot shows the 'AOT Participant Event Tracking' interface. At the top, there is a blue header with the title 'AOT Participant Event Tracking' and a navigation bar with tabs: 'Summary', 'Variables', 'Reports', 'Analyses', 'Filters', and 'Contexts'. The 'Reports' tab is highlighted with an orange circle. Below the navigation bar, there are two buttons: 'Update' (with a refresh icon) and 'Download report' (with a download icon). Below these buttons, it says 'Report created: 3/4/2019, 3:24:56 PM'. A table lists several reports, with the first row highlighted in orange:

Name	Title
 <b>Client Event Report</b>	Report Client Event Listing
 <b>EventReport</b>	Report Event Report
 <b>Questionnaire</b>	Questionnaire Report
 <b>Summary</b>	Summary Report
 <b>Summary Tables</b>	Summary Tables Report

Running the whole report with all your data might work well in the very beginning, but as time goes on, you'll want to use some filters. Let's look at how filters work.

## Unfiltered Client Event Report results

View Record	Commitment status	Event you wish to report	Date Event Start	Please enter any notes related to this ""Event you wish to report"" event
366	Ongoing Commitment	Arrest	02/08/2019	Some comments or notes about the arrest.
488	Ongoing Commitment	Hospitalization	02/01/2019	Something in the notes field for this participant.
366	Ongoing Commitment	Eviction	02/02/2019	
366	Ongoing Commitment	Court ordered evaluation	02/02/2019	
77013	Ongoing Commitment	Arrest	03/05/2019	Arrested for stealing snacks from Speedway
77013	Ongoing Commitment	Hospitalization	06/01/2017	Participant was having adverse reaction to meds. He was stabilized and released. He was following his treatment plan.
77013	Ongoing Commitment	Court ordered evaluation	11/15/2017	Doctor was concerned because participant was acting despondent and talking about hurting himself.
77013	Ongoing Commitment	AOT termination	01/08/2018	Doctor did not request continuation. Felt participant would follow through with treatment on his own.
77013	Post-enrollment tracking	Hospitalization	06/18/2018	Participant was hospitalized due to difficulties with side effects to medication. Doctor did not think he needed to be placed on AOT again.

In this case I want to know what happened to the participant with **the RecordID** of “77013”. To make this happen I will first click on the “Filters” tab, and then click “RecordID”.

The screenshot shows the 'AOT Participant Event Tracking' interface. At the top, there are tabs for 'Analyze' and 'Home'. Below that, a blue header contains the title 'AOT Participant Event Tracking'. A secondary navigation bar includes tabs for 'Summary', 'Variables', 'Reports', 'Analyses', 'Filters', and 'Contexts'. The 'Filters' tab is circled in orange. Below the navigation is an 'Update report' button with a refresh icon. A 'Name' label is positioned above a list of filters. The first filter, 'RecordID - View Record (not filtered)', is highlighted with an orange border and has an orange arrow pointing to it from the right. Below this filter is a 'Find:' input field. Other filters listed include 'DateEventStart - Date Event Start (not filtered)', 'MonitorLocation - AOT Monitor Location (not filtered)', 'Status - Commitment status (not filtered)', and 'EventType - Event you wish to report (not filtered)'. At the bottom of the filter list is a 'Custom filter' input field.

Next, place a check mark in the box to the left of “Find” and enter the RecordID “77013” into the box to the right of the word “Find” and click “Update Report” like the example below.

The screenshot shows the 'AOT Participant Event Tracking' interface. At the top, there are tabs for 'Summary', 'Variables', 'Reports', 'Analyses', 'Filters', and 'Contexts'. Below the tabs is a 'Name' section with an 'Update report' button, which is highlighted by an orange arrow. Below this is a list of filter variables: 'RecordID - View Record =77013', 'DateEventStart - Date Event Start (not filtered)', 'MonitorLocation - AOT Monitor Location (not filtered)', 'Status - Commitment status (not filtered)', and 'EventType - Event you wish to report (not filtered)'. The 'RecordID' filter is expanded, showing a 'Find:' input field with a checkmark and the value '77013'. Below the filters is a 'Custom filter' input field.

Results

View Record	Commitment status	Event you wish to report	Date Event Start	Please enter any notes related to this ""Event you wish to report"" event
77013	Ongoing Commitment	Arrest	03/05/2019	Arrested for stealing snacks from Speedway
77013	Ongoing Commitment	Hospitalization	06/01/2017	Participant was having adverse reaction to meds. He was stabilized and released. He was following his treatment plan.
77013	Ongoing Commitment	Court ordered evaluation	11/15/2017	Doctor was concerned because participant was acting despondent and talking about hurting himself.
77013	Ongoing Commitment	AOT termination	01/08/2018	Doctor did not request continuation. Felt participant would follow through with treatment on his own.
77013	Post-enrollment tracking	Hospitalization	06/18/2018	Participant was hospitalized due to difficulties with side effects to medication. Doctor did not think he needed to be placed on AOT again.

If I further wanted to limit the displayed events by a **date range** I can click on another filter and use the calendar “data pickers” to select a specific date range. For this example, I am going to use a date range of January 1<sup>st</sup> 2018 through current. Select your date range and then click “Update report”.

## AOT Participant Event Tracking

Summary
Variables
Reports
Analyses
Filters
Contexts

[Update report](#)

**Name**

- ▲ ? RecordID - View Record =77013
 

Find:
- ▲ ? DateEventStart - Date Event Start >=01/01/2018 <=03/07/2019
 

From:

To:
- ▶ ? MonitorLocation - AOT Monitor Location (not filtered)
- ▶ ? Status - Commitment status (not filtered)
- ▶ ? EventType - Event you wish to report (not filtered)

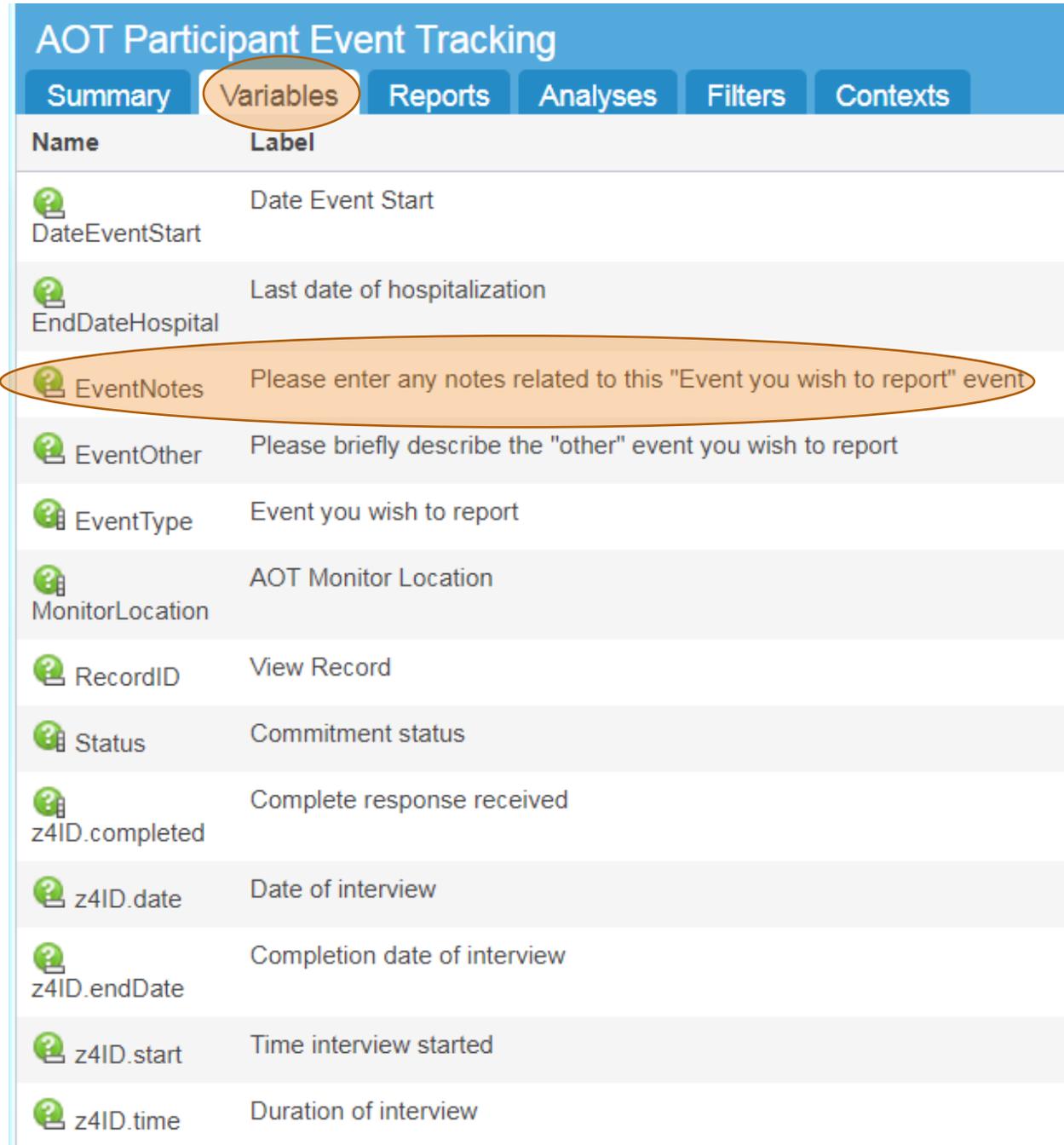
Custom filter

Results

View Record	Commitment status	Event you wish to report	Date Event Start	Please enter any notes related to this ""Event you wish to report"" event
77013	Ongoing Commitment	Arrest	03/05/2019	Arrested for stealing snacks from Speedway
77013	Ongoing Commitment	AOT termination	01/08/2018	Doctor did not request continuation. Felt participant would follow through with treatment on his own.
77013	Post-enrollment tracking	Hospitalization	06/18/2018	Participant was hospitalized due to difficulties with side effects to medication. Doctor did not think he needed to be placed on AOT again.

If a filter is not available for a variable you would like to use, you can create a **“Custom filter”** by typing in the name of the variable followed by “=” and the variable text you want to use.

If you cannot remember, or don’t know the name of the variable for the notes field click the “Variables” tab and you will see a listing of all variables.



AOT Participant Event Tracking					
Summary	Variables	Reports	Analyses	Filters	Contexts
Name	Label				
 DateEventStart	Date Event Start				
 EndDateHospital	Last date of hospitalization				
 EventNotes	Please enter any notes related to this "Event you wish to report" event				
 EventOther	Please briefly describe the "other" event you wish to report				
 EventType	Event you wish to report				
 MonitorLocation	AOT Monitor Location				
 RecordID	View Record				
 Status	Commitment status				
 z4ID.completed	Complete response received				
 z4ID.date	Date of interview				
 z4ID.endDate	Completion date of interview				
 z4ID.start	Time interview started				
 z4ID.time	Duration of interview				

For this example, we want to know when there were notes about the “Doctor”.

NOTE: When you use a free text field like the “EventNotes” in this example you must remember that text is case sensitive. One way to avoid this issue is to type in the word without the first letter.

Type in “EventNotes=octor” into the “Custom filter” space

NOTE: Variable names cannot contain spaces, therefore variables are often abbreviated and usually utilize a capital letter to denote a new word. You can also just use the copy and paste features to get it right within the “Custom filter” field.

The screenshot shows the 'AOT Participant Event Tracking' interface. At the top, there are navigation tabs for 'Analyze' and 'Home'. Below this is a sub-header 'AOT Participant Event Tracking' with tabs for 'Summary', 'Variables', 'Reports', 'Analyses', 'Filters', and 'Contexts'. The 'Filters' tab is active. Below the tabs is an 'Update report' button. The main area is titled 'Name' and contains a list of filter criteria:

- RecordID - View Record =77013
  - Find: 77013
- DateEventStart - Date Event Start >=01/01/2018 <=03/07/2019
  - From: 01/01/2018
  - To: 03/07/2019
- MonitorLocation - AOT Monitor Location (not filtered)
- Status - Commitment status (not filtered)
- EventType - Event you wish to report (not filtered)
- Custom filter: EventNotes=octor

Results are now filtered by "RecordID", Date range, and "EventNotes=octo"

<a href="#">View Record</a>	Commitment status	Event you wish to report	Date Event Start	Please enter any notes related to this ""Event you wish to report"" event
<a href="#">77013</a>	Ongoing Commitment	AOT termination	01/08/2018	Doctor did not request continuation. Felt participant would follow through with treatment on his own.
<a href="#">77013</a>	Post-enrollment tracking	Hospitalization	06/18/2018	Participant was hospitalized due to difficulties with side effects to medication. Doctor did not think he needed to be placed on AOT again.