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# Import Data into CASA

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# *Clinic Assessment Software Application*

## ***CASA BENEFITS YOUR PRACTICE***

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### ***Assessment***

- How are we doing?
- Where do we need to improve?
- Measure changes.



# Objectives

- ◆ In these tutorials, you will learn to:
  - Enter data into CASA
  - Produce coverage reports
  - List unimmunized children
  - Identify missed opportunities
  - Generate recalls and reminders

# Excel and ASCII Files

- ◆ On the CASA page of this course (available from the Course Modules page), you will find one Excel and one ASCII file for each of four clinics we will study
- ◆ Use the Excel files as references for the ASCII files
- ◆ In the assignments, you will import the ASCII files into CASA
- ◆ Here is some information on the four files

# Details of the Four Study Sites

<b>Clinic</b>	<b>Type</b>	<b>No.</b>	<b>Youngest</b>	<b>Oldest</b>
A	P	100	09/17/96	08/17/97
B	P	100	05/28/97	10/04/97
C	C	100	06/25/97	09/16/97
D	H	100	08/11/97	09/26/97

# Create an Import Template

- ◆ Open CASA
- ◆ From the main drop-down menu in CASA, select "Assessment Site"
- ◆ From that menu, select "Import"; then choose "Create an Import Template"

**Screenshot shown on next slide.**

**Create**

**Edit**

**Sample Size Determination**

**Random Number Generator**

**Import** ▶

**Export** ▶

**Printer Set-Up**

**Exit CASA....**

**Alt+F4**

**Create An Import Template**

**Import Using An Existing Template**

**Edit An Import Template**

**Delete An Import Template**

# Declare Variables

- ◆ On the CASA page (available from the Course Modules page), you will find a dictionary file relating the clinic (PDF file) and CASA variable names
- ◆ Note that every field in the clinic files must be formatted in the CASA import process
- ◆ Select the CASA equivalent of each clinic variable from the left window and double-click to enter them

# Declare Variables

- ◆ The variables should appear in the right-hand window
- ◆ If you have an element in your PDF file which is not on the CASA list, select “Blank Field”
- ◆ Click “Next” once all variables are entered

**Screenshot shown on next slide.**



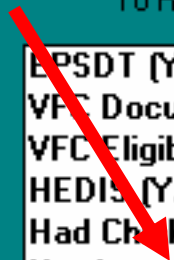
# CASA Import Wizard

Screen **1** Of 4 Screens

Map Out The Data Elements and Data Order Of Your Incoming Import File From The List On The Left

Note: If Your Import File Contains A Piece of Data Not On The Left-Hand List, Choose "Blank Field" To Represent That Element.

- EPSDT (Y/N)
- VFC Documentation (Y/N)
- VFC Eligibility Category (1-5)
- HEDIS (Y/N)
- Had ChickenPox (Y/N)
- Number of Visits (###)
- Starting Service Date**
- Last Visit Date
- Zip Code (999999999)
- Shot Type (CPT, HL7 or Literal)
- Shot Date
- Medical Record Number #1:
- Medical Record Number #2:
- Gender (M/F)



Data Flow



Starting Service Date

Help

Next

Cancel

# Set File Type (Screen 2)

- ◆ Select the type of file you are importing—in this case, the file type is “ASCII Text File, Delimited With Tabs”
- ◆ Click “Next”

**Screenshot shown on next slide.**



# CASA Import Wizard

Screen **2** Of 4 Screens

Select The Format Type That Matches Your Import File

- ASCII Text File, Comma Delimited
- ASCII Text File, Fixed Field Lengths (SDF)
- ASCII Text File, Delimited With Tabs**
- ASCII Text File, Other Delimiter
- dBASE, Clipper, or FoxPro Database File



Help

Back

Next

Cancel

# Adjust Field Lengths as Needed (Screen 3)

- ◆ In practice, you may need to change the length of a field by double-clicking in that box
- ◆ A field length of "8" is sufficient for date fields
- ◆ In this exercise, field length adjustment will not be necessary
- ◆ Click "Next" when finished

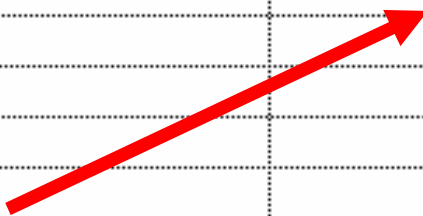
**Screenshot shown on next slide.**

# CASA Import Wizard

Screen **3** Of 4 Screens

Change The Field Lengths To Match Your Import File

Field Contents	Field Length
Starting Service Date	8
Date-of-Birth	8
Unique Patient Identifier	10



(If No Response Click Again)

Help

Back

Next

Cancel

# Import Your Data

- ◆ In the next screen, find where you saved your ASCII files. Select mc\_vaca.txt file for Clinic A
- ◆ Once it is located, select “Import”

**Screenshot shown on next slide.**



# Open



Find Your ASCII File

casa-c~1.txt

casa-c~1.txt

mc\_vac.txt

Directory:

c:\holly\mcques~1\

c:\  
holly  
mcques~1

Drive:

c:

None

Import

Cancel

All Files

# Assessment Site Screen

- ◆ A prompt will briefly appear in the upper-right-hand corner, saying “Congratulations, the data were successfully imported”
- ◆ NB. You may not see the “Congratulations” message

# Save the Import Template

- ◆ To save this template, give it a name in the box provided and click “Finish”

**Screenshot shown on next slide.**



# CASA Import Wizard

Screen **4** Of 4 Screens

Save This Import Template

Template Name:

Add The Data Just Imported to CASA



Help

Back

Finish

Cancel

# Create Assessment Site Screen

- ◆ The Assessment Site Download appears next
- ◆ Type your Assessment Site information, including Name (Clinic A), Provider Type (P), your 3 initials

# Assessment Site Screen

- ◆ We want to analyze children 24–35 months of age; for Clinic A:
  - Youngest birth date: 09/17/96
  - Oldest birth date: 08/17/97
  - Therefore, set the Common Assessment fields to 09/01/1999 to capture all of the age-eligible records
  - Click Exit and Save

**Screenshot shown on next slide.**



## Assessment Site Download

Name Of Assessed Site:

City:  State:  Zipcode:

Provider Type:  Public Health Center

Assessor's Initials:

Assessment Date:  Common Assessment

Perform Assessment Range Calculations In...  Months  Years

From:  Months To:  Months From 09/01/1999

(  ) (  )

Ok

Cancel

# Repeat for Other Clinics

- ◆ Similarly, create Assessment Site files for Clinics B, C, and D
- ◆ Import the files using the same template you created for Clinic A (NB. Choose “Import Using An Existing Template” and follow the import wizard instructions)
- ◆ Refer to Slide 5 to fill the study site information; the common assessment site should be **09/01/99** for all clinics

# Repeat for Other Clinics

- ◆ Once imported, files are saved and can be retrieved through the other CASA menus