OMS Case Review Source Data Report—OCRSD User Guide

June 2022

What is the OMS Case Review Source Data report and who has access to it?

The OMS Case Review Source Data (OCRSD) report provides OSRI answers, narratives, and ratings for each case returned after querying. You may filter by site, case review month, PUR start date, and cases that have been designated for PIP monitoring.
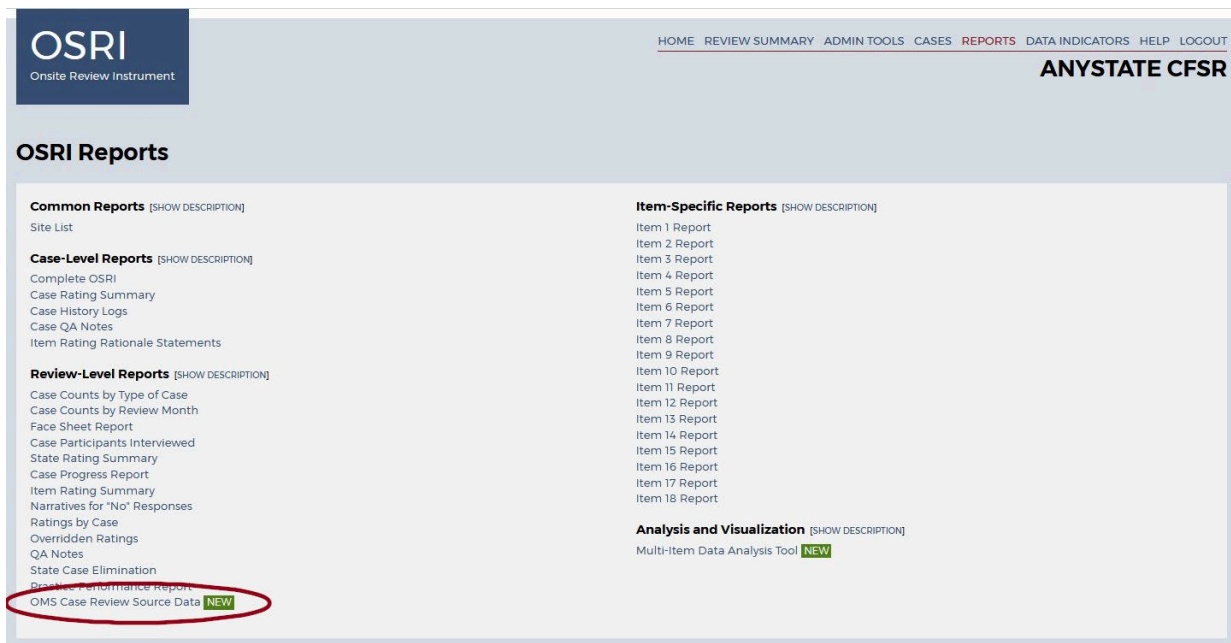
The OCRSD report only includes cases with a status of Approved and Final that have been de-identified. It exports directly from the OMS into an Excel spreadsheet, as it is intended for data analysis either within Excel or with other statistical analysis software.

This report is available to anyone with access to Review-Level Reports (Site Leaders, read-only Observers, and OMS State Administrators).

Instructions

To access the OCRSD report once you have logged into the portal and navigated to the OMS, select your state's CFSR or CQI Review, select the OSRI, and click on the "REPORTS" link at the top of the page. The OSRI Reports page will look different depending upon the types of reports you have access to. The OCRSD report will appear under the heading "Review-Level Reports." See **Figure 1**.

Figure 1: OSRI Reports Page

After you click on "OMS Case Review Source Data," the first page of the OCRSD you will see is the main filter screen, which lists the filters you can use to build the report. See **Figure 2.** You can filter by site, case review month, PUR start date, and PIP Monitoring status. Of these filters, only PIP monitoring status is optional. You must specify answers for the other filters.

After selecting the filters, click on "EXPORT XLSX" below the filters on the right-hand side of page. The OMS will generate an Excel file that your browser will save to your local device.

OCRSD Report Layout

After opening the Excel file, you will see the OCRSD report's Overview sheet, which presents information about the review state, type of review, report creation, case sampling type (if set), and the filters used in creating the report. See **Figure 3.**

Figure 3: OCRSD Report Overview Sheet

This is one of three sheets in the report. The other two are the Source Data sheet, which provides the report's exported data, and the Data Codebook sheet, which presents a table correlating variable names (e.g., "review_site_id_name") with variable labels (in this case, "SITE ID"). You can select which sheet to view by clicking on the tabs in the lower left corner of the screen.

Figure 4: Data Codebook Sheet

The Data Codebook (see **Figure 4**) relates the variable names to variable labels, serving as a reference for OCRSD report users.

The core of the OCRSD Report is the Source Data sheet (see **Figure 5**), which provides approximately 90% of OSRI data for the cases returned after filtering. Each column presents a variable, listed by variable name, and each row presents the data for a single case.

To maintain usability when working with so many columns (and potentially more rows), the column headers and the entries for column A in each row (highlighted in red) have been pinned. When scrolling down, the column headers remain in place at the top of the spreadsheet, and when scrolling to the right, the case label (i.e., "case_name") for the row remains in place along the left side of the spreadsheet.

Figure 5: Source Data Sheet

You may sort the data on any of the columns using the dropdown menu for the column (see **Figure 6**).

Figure 6: Dropdown Menu in Source Data Sheet

	A	B	C	
1	case_name	review_site_id_na	pur_start_date	revi
2	ANY-SITE01-631	Metropolis	04/01/2015	05/(
3	ANY-SITE02-6265	Cabot Cove	04/01/2015	04/(
4	ANY-SITE02-6411	Cabot Cove	07/01/2015	08/(
5	ANY-SITE02-6360	Cabot Cove	04/01/2015	06/:
6	ANY-SITE03-6442	Springfield	04/01/2015	07/:
7	ANY-SITE01-6280	Metropolis	04/01/2015	04/(
8	ANY-SITE01-6384	Metropolis	07/01/2015	07/(
9	ANY-SITE03-6408	Springfield	07/01/2015	07/:
10	ANY-SITE03-6427	Springfield	07/01/2015	08/:

All cells in the Source Data sheet should be filled. Cells that have no OMS data have been filled with periods to prevent any ambiguity about the meaning of an apparently empty cell and to preserve formatting. See **Figure 7**.

Figure 7: Periods Added for Cells With No Data

G	H	I
Safety_1_Perform	Safety_1_Perform	Safety_2_Perform
NA	.	Substantially Achieve
NA	.	Substantially Achieve
NA	.	Substantially Achieve
NA	.	Substantially Achieve
NA	.	Not Achieved
NA	.	Not Achieved

A Note About What's Not in the Report

Although nearly all of the data in the Source Data sheet comes verbatim from the OMS, some of the data is not verbatim and some of the OSRI answers do not appear in the report. A handful of values are tabulations about OSRI content, and so do not come from the OSRI. For example, the Total Number of Reasons for Opening column presents a number representing the number of Yes entries in the 14 columns addressing the potential reasons for opening a case: physical abuse, sexual abuse, emotional maltreatment, neglect, medical neglect, abandonment, parent health, child health, parent substance abuse, child behavior, child substance abuse, domestic violence, juvenile justice, and other. A case opened because of neglect and medical neglect would have a 2 in this column.

In addition, some material from the OSRI does not appear in this report. Some OSRI items have tables, and reproducing the tables in the one-case-per-row format would be either impossible (as a technical matter) or undesirable (because it would make the Source Data sheet unwieldy). Consider the case of demographic information. In foster care cases, there is a single "target child" who alone is the subject of Items 4−18. However, for in-home cases, reviewers are to consider all children in the home for Items 1−3 *and* 12−18. Representing demographic information in a single-case-per-row format for the former is thus feasible in ways that it is not for the latter.