TATS Tips For Running the Macro-LES 2017-2018

What IS a Macro?

- A Macro is a series of commands and functions that are stored and can be run whenever you need to perform the task. (Microsoft Office)
- The macro is used in the Florida Child Outcomes Measurement System to merge selected data from the BDI-2 Data Manager into an Excel file

Purpose of Macro:

- Check for errors in data prior to reporting by
  - Child ID
  - Point of entry/exit
  - Checking domain DQs
  - Identify children needing an exit BDI-2
  - Match NormType

The Tip Sheets:

- Tip Sheet 1: Requesting Files from the Data Manager
- Tip Sheet 2: Downloading Files from Data Manager
- Tip Sheet 3: Importing Data Manager Files into Macro Template/Running the Macro
- Tip Sheet 4: Knowing & Customizing Your Macro
- Tip Sheet 5: Checking Data for Accuracy and Errors
- Q & A/Troubleshooting
  - The Data Manager
  - Regional Facilitators

TIP SHEET 1: Request Files from Data Manager to Export to Macro

Steps to Request Files from Data Manager:

1. **LOG ON**
   - Go to: **http://www.bdi2datamanager.com**
   - Use your administrator log-in and password or another log-in that has administrative privileges

2. **COLLECT YOUR INFORMATION**
   - Click **Import/Export** tab located on the top right of the menu bar
   - Click **Export** in the drop down menu
   - Look under **Select File to Export** on the left hand side of the page
   - Click **Student and Assessment Summary**
   - Under **Selected Organization**, click on the group of students you would like to include in your file
   - Under **Select File Delimiter**, **Tab** is the default setting
   - Enter your email address
   - Choose **Export Beginning Date**:
     - **07/01/2014** (to capture all children in the program 6 months to 3 years for exit BDI-2's)
     - **07/01/2017** for current reporting period
   - Choose **Export Ending Date**:
     - Use **Today's** date if in the middle of a reporting period
     - Use **06/30/2018** when the reporting period is finished
   - Leave **Select Program Note Criteria** blank

3. **PREPARE TO EXPORT**
   - Click on **Schedule Export**

4. **WAIT**
   - The Import/Export Schedule queue will appear, showing the status of the requested report
   - You will receive an email from Riverside almost immediately acknowledging your request. **Exported downloads may take a few minutes or up to 24 hours**

**** While waiting for the documents to finish, you must click out of Scheduled Queue, because if you stay on that location, it will not show progress.****

5. **REPEAT**
   - Export the **Assessment Domains** files by repeating Steps #2 through 4. **Note**: Use the SAME range for beginning and ending export dates as you used for the **Student and Assessment Summary** file

You will receive another e-mail when the file has been imported and is ready to be downloaded.

6. **CHECK**
   - Click on **Import/Export** on the tool bar and **Scheduled Queue** from the drop down menu
   - Scroll to the bottom of the page, and the reports requested will have a **Finished** status

Tip Sheet 2: Downloading Files From Data Manager to Macro

STEPS

1. Log onto the Data Manager using your administrator log-in and password: www.bdi2datamanager.com
2. Click on the **Import/Export** tab located on the top right of the menu bar
3. Click on **Scheduled Queue** in the drop-down menu. You will see the two files you requested at the bottom: **Student and Assessment Summary** and **Assessment Domains**
    - Be sure you select the files with **TODAY's** date
    - Be sure it says **FINISHED** next to each file
4. Start with **Student and Assessment Summary:**
    - Click on the **blue arrow** icon on the far right, under **Actions**
5. A dialogue box will ask if you want to Open or Save:
    - Choose **Save AS**, and to your **DESKTOP** (or it may automatically download to your **downloads** folder)
    - Click **OK**

REPEAT

1. To access the **Assessment Domains** files, go back to the **Data Manager**
2. Repeat Steps #2-5

NEXT – UNZIPPING FILES

1. Go to your desktop (or **downloads** folder)
2. **RIGHT** click on the Student and Assessment file
3. Click **Extract** or **Extract All**. (Depending on your zipping software, you may need to click **Browse**.)
4. Click **Extract**
5. You may be asked to enter a password. It will be the same password you use for the BDI-2 Data Manager website
6. **Double click** on **Hmhandnas006a** file
7. **Keep double-clicking** until you see Student and Assessments.
8. **Double click again-**you should see a text box with names, numbers, etc.

THIS IS NOT THE MACRO, BUT YOU ARE ALMOST THERE! ☺

9. Close that box, and the Student and Assessment file.

REPEAT

1. Repeat to unzip Assessment Domains file (Unzipping Files, steps 1-9).

**** When you are finished unzipping the files, go to your desktop and delete the zipped folders so they are not accidently imported to the macro worksheet. ****

Tip Sheet 3: Importing Data Manager Files into the Excel Macro Template/ (Running the Macro)

PREPARE TO IMPORT:

1. Open the Excel macro template found on the TATS website
2. **Steps to Download the Macro Excel Spreadsheet**
    - Go to the TATS website (tats.ucf.edu)
    - Click **Child Outcomes** on home page
    - Click **Tools/Resources for data** from the drop down menu
    - Click **For Excel 2007 and later** under Macro heading
    - Click file to open
    - **DO NOT** change or alter the file name of the template if you save it

3. When you open the file, the program **may** ask if you want to disable or enable macros. **ENABLE MACROS** in order for the macro to run.
   There may be a Security Warning near the top of the screen, which states: "Macros have been disabled."
    - Click on the **Options** box
    - Click on **Enable this content**.

3. At the bottom of the macro excel spreadsheet, there will be three tabs: **Student and Assessment Summary**, **Assessment Domains**, and **Run Macro**.

4. Click on **Student and Assessment Summary.**

TO IMPORT STUDENT and ASSESSMENT SUMMARY:

5. Place cursor on the top, left box of the table, **A1.**
6. From the horizontal menu at the top of the screen, select the **Data** tab.

Which version of Excel are you using?

SELECT YOUR EXCEL VERSION: (Right click on Excel icon, left click on Properties to find your version)

<u>For Microsoft Excel 2007 & later users only</u>

7. On the tool bar, find **Get External Data**. Choose **From Text**.
8. Find the **Student and Assessment** file on your desktop or download file
9. Keep clicking until you get the **Student and Assessment Summary** file
10. Click **Import**, which causes the Text Import Wizard box to open. Now skip to item #11 below.

<u>For Microsoft Excel XP or older version users only</u>

7. On the tool bar, find "**Import External Data**" and select "**Import Data**."
8. A dialog box will pop up- "**Select Data Source**".
9. Find **the Student and Assessment** zipped file on your desktop.
10. Click "**Open**." Now continue with item #11 below.

Text Import Wizard Dialog Box

11. **Text Import Wizard Step 1.** Leave the default settings as they are: (Original data type: delimited, Start import row: 1, File origin: 437: OEMUnited States). Click **Next**.
12. **Text Import Wizard Step 2**: **Delimiters** tab is checked. Click **Next**
13. **Text Import Wizard Step 3**, **CHANGE** the **Child ID** column data format to **Text** and leave all other columns as **General** (default setting). Click **Finish**

Import Data Dialog Box

14. An **Import Data** dialog box will pop up. You should be looking at a small box with "=A1". Verify that the **Existing worksheet** radio button is marked. Click **OK**

REPEAT

15. Click on the **Assessment Domains** tab at the bottom of the macro excel spreadsheet. Repeat steps #4 – 14 using the **Assessment Domains** file that you downloaded

REMINDER: Do not make any modifications to these worksheets. Any changes (i.e., adding or deleting columns) may result in the macro working improperly.

<u>RUNNING THE MACRO</u>

1. Click **Run Macro** tab at the bottom of the macro excel spreadsheet
2. Choose **Early Steps**. While the macro is running, your screen may flash/blink several times
3. When the screen stops flashing, your macro is complete
4. **Important!!** Do a file **"Save As"** and include the **current date** in the file name

Note: Be sure to delete the imported files and the macro template from your desktop. Download a new macro template from the TATS website with each use.

Tip Sheet 4: Knowing and Customizing Your Macro

The columns to become familiar with in the **Abridged Results** are as follows:

Column Letter	Heading	Purpose	Common Errors
A	Child ID	LES generated 10 digit unique ID	Too many/not enough numbers
B	Child ID Length	Indicates if the ID is the correct digits	Too many/not enough numbers
C	First Name	Child's legal first name	Nicknames, misspelling
D	Last Name	Child's legal last name	misspelling
E	Date of Birth	Date of birth	Wrong date
F	Assessment Type	Screener or full assessment	Duplicate records
G	First Test Date	Highlighted RED if an Exit is **not** necessary (*for LEA purposes*)	
H	Examiner	Assessment examiner/team	Old data points entered
I	Program Note	Internal notes-25 characters (examiner name, transfer, etc.)	
J	Program Note 2	FCOMS data point- entry/exit(will be highlighted yellow if incorrect or blank)	Incorrect option or blank
K	Program Note 3	May be used for local purpose	
L	Program Note 4	May be used for local purpose	
M	Program Note 5	May be used for local purpose	
N	Adaptive DQ Score	Ensure scores are within range	Scores less than 55 or more than 145
O	Personal/Social DQ Score	Ensure scores are within range	Scores less than 55 or more than 145
P	Communication DQ Score	Ensure scores are within range	Scores less than 55 or more than 145
Q	Adaptive Screener Raw Score	Ensure scores are within range according to cut score	
R	Personal/Social Screener Raw Score	Ensure scores are within range according to cut score	
S	Communication Screener Raw Score	Ensure scores are within range according to cut score	
T	NormType	Ensure that exit and entry have matching norm types	Entry and Exit Norm Types don't match

Notes:

- **If you hide columns they WILL be included if printed, creating a giant spreadsheet that will not fit on one page. Therefore, the number of pages printed will be enormous.**
- **If you delete columns to customize your macro for printing, the columns adjust and the column letters change.**

Hiding Columns

- Place cursor on the column header (**letter**) to delete. An arrow will appear.
- **Left click**, and the column should highlight.
- **Right click**, scroll down the choice box and **left click** on **Hide.**

Deleting Columns

- Place cursor on the column header (**letter**) to delete. An arrow will appear.
- **Left click**, and the column should highlight.
- **Right click**, scroll down the choice box and **left click** on **Delete.**

Hiding Multiple Columns

- **Left click** to highlight a column as above.
- Hold **left click** down and scroll left or right to highlight columns to be deleted. Do a few at a time if it is easier.
- **Right click**, scroll down the choice box and **left click** on **Hide.**

Deleting multiple columns:

- **Left click** to highlight a column as above.
- Hold **left click** down and scroll left or right to highlight columns to be deleted. Do a few at a time if it is easier.
- **Right click**, scroll down the choice box and **left click** on **Delete.**

TIP SHEET 5: CHECKING DATA FOR ACCURACY AND ERRORS

Checking primarily for:

- accuracy of the Child Identification numbers
- accuracy of the point of entry/exit
- DQ/screener scores are within range
- identification of children needing exits

Step 1: Preparing to Sort

- Place cursor in box **1**. An arrow will appear.
- Left click to highlight all headers.

- Click **Filter** or **Sort & Filter** (top right-depending on your Excel version)
- Click **Filter –** drop down arrows will appear in all boxes.

Step 2: Sorting Data

A. To Sort By Child ID Length

- Click the drop down arrow next to **Child ID Length**.
- Click **Sort A to Z** or **Smallest to Largest**

What to Look For

- Child IDs with fewer than 10 characters/digits
- Child IDs with more than 10 characters/digits
- Children with NO ID.

What to Do

- **Make any necessary corrections in the Data Manager** as changes made to the spreadsheet will NOT be reflected in the online system

B. To Sort by Data Point of Entry/Exit Using Program Note 2

- Click the drop down arrow next to **Program Note 2**
- Click **Sort A to Z** or **Smallest to Largest**

What to Look For: LES

- Part C Entry
- Part C Exit
- 0: Ineligible
- 1: Other: Not for Child Outcomes
- 2: Child 30 months or older: Not for Child Outcomes

What to Do

- Look for any entries that are **NOT** listed in the above boxes.
- **Make any corrections in the Data Manager**. Any changes made to the spreadsheet will NOT be reflected in the online data manager system.

C. Sorting Data by Domain DQs

Sort by Domain DQ

- Ensure all domain/screener scores are within the acceptable range
- Ensure that records have scores in all 3 required domains

Note: A child receiving a "refer" on a screener domain must continue with a full BDI-2 in that domain within the 14 day window. Please ensure a process is in place or ask your TATS facilitator for assistance.

Steps to Sort by Domain

1. Click the drop down arrow next to **Adaptive DQ Score**.
2. Click **Sort A to Z** or **Smallest to Largest.**
3. Be sure scores are within range (see table below).
4. Follow above steps for each domain.

Domain DQ Score

Adaptive	55-145
Personal/Social	55-145
Communication	55-145

To Isolate a Group by Date of Birth (for current reporting period)

1. Sort spreadsheet by "DateofBirth" column.
2. Hide/delete children born **before** July 1, 2014

Ensure that Norm Type of entry and exit match

1. Sort spreadsheet by child ID and ensure that both Entry and Exit NormType columns match

- Click the drop down arrow next to **Child ID**
- Click **Sort A to Z** or **Smallest to Largest**
- **Be sure that both Entry and Exit NormType match (1-1 or 2-2)**
- ***All Entries done after 1/1/17 must be NormType 2***

Q & A/ Troubleshooting

The Data Manager

1) **Can e-mail addresses be saved in the drop down menu while exporting data from the data manager?** YES- check that security settings are set to medium, or contact your agency's IT person.

2) **Can the examiner's name be saved for future entries?** Yes. Enter the examiner name as a New Staff Member under Staff Administration in the Data Manager.

3) **Why is ethnicity and race required in the BDI-2 data manager when it is not on the protocol?** It was a Riverside decision.

4) **Is there any way, when entering data, to tab down a column instead of having to move the cursor and click each time?** No.

5) **Why do we need to report by observation, structured, or interview if this information isn't used? Can't that column be taken out so, we can move on quickly when entering data?** That information is used for accountability for fidelity of the instrument. Also, it could be useful if litigation were ever an issue.

6) **Can a mechanism be added to the data to the data manager to trigger an incomplete ID number?** No.

7) **Can the additional options be deleted in the Program Note 2 (data point)?** No, the additional program notes and drop down options were a decision by Riverside.

For any other questions or issues, please contact your TATS Regional Facilitator:

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