



HCHS/SOL Recruitment Data Management System Users Guide

Addendum 2: Clean up of MainHHID, ParticipantIDS & AdditionalHHID Pick Lists

October 4, 2010

Clean up of Pick Lists

This addendum is designed to aid the performance of the TableKiosk handhelds used for SOL Study recruitment. It describes the clean-up process for the MainHHID, Participant IDS and Additional HHID pick lists. Centers may need to perform this maintenance task more often than initially anticipated. The CC recommends to have it done on a monthly basis (if possible,) in combination with the windows defrag utility, to help increase performance for the Mi-Forms software, Excel and Windows. Refer to the “HCHS Recruitment Data Management User Guide” located in the Study Website for additional information, if needed.

OVERVIEW

The procedure is the clean-up management of the three Excel spreadsheets that contain the list for **MainHHID**, **AdditionalHHID** and the **ParticipantIDS**. At the end of the procedure, there will be two Excel files:

1. **UPDATE** file that will contain the FREE (and/or MULTI-not closed) IDs, which will be placed in the corresponding Handheld directory for the list being manage.
2. **ARCHIVE** file that will contain all SELECTED finalized (and/or MULTI-Closed) IDs, which will be saved in the local system.

INSTRUCTIONS

Step 1. Before you start the procedure you need:

- Thumb-drive (USB-removable device to transfer data)
- Identify FC local System in which a copy of the Archive Excel files will be saved

Step 2. Main Rules for all Lists

- The folder name (subdirectory) CANNOT be changed. The Mi-Forms application will NOT work if this occurs.
- The file can be named whatever you choose as long as:
 - There is a single file in the directory. (*Note: this means that each Center will have different names for the files. For this reason we cannot be name specific for the “Original” files.*)
 - The file has the .xls extension

Step 3. MainhouseholdIDS

- The primary list of household IDs is stored in subdirectory K:\mainhouseholdIDS (remember rules described in **Step 2**)
- Open the directory
- Save Excel file to Thumb-drive, using name convention “**Archive**-(date)”
For example: *HHID-Archive-9-30-10.xls*
- Transfer **Archive** file to FC local system for ease of use
- Open the **Archive** file.



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(Step 3. Continues)

This spreadsheet has information in columns A-E as follows:

- A: Household ID
- B: Street Address
- C: Y/N for drop point (or multi unit) status
- D: Filled with the text FREE. The application will switch this text to SELECTED as each Household ID has been accessed.
- E: Date and time stamp

- Create a new Excel file, and save it with the name “**Update**-date” for example: *MainHHID-Update-9-30-10.xls*
- Identify Free and/or Multi-not closed IDs, from the “**Archive**” file, to be moved to the **Update** file.

Selection of ID's to Move

- See Column C and D in the spreadsheet
- Those identified as N (C column) and FREE (D Column) will be moved to the **Update** file. These numbers have not been used.
- For those that are MULTI (C column) will need to be reviewed to determine if they are Closed or not-closed. Only the MULTI not-close will be moved to the **Update** file. Closed MULTI will remain in the **Archive** file.

Once you have identified which IDs qualify to be moved from **Archive** file, proceed as follows:

- From **Archive** file
Highlight rows to be cut. Select ‘Cut’ from right-click menu. Make sure you cut all the information in the row.
- Go to the **Update** file
Paste the rows into the file. Select ‘Paste’ from right-click menu.
- Make sure the information was transferred correctly. Depending on the version of Excel, the cut might not move the information from the **Archive** file. Make sure that the information was moved not just copied.
- Save both files in the local system.
Move **Update** file into the thumb-drive so it can be transferred into the Handheld.
- Copy the **Updated** file in the Handheld directory K:mainhouseholdID.
Make sure you have only One file in this directory. Relocate the old file if necessary.



Step 4. ParticipantIDS

- The participant IDs list file is stored in subdirectory K:\participantIDS.
(remember rules described in **Step 2**)
- Open the directory
- Save Excel file to Thumb-drive, using name convention "**Archive**-(date)"
For example: *PartID-Archive-9-30-10.xls*
- Transfer **Archive** file to FC local system for ease of use
- Open the **Archive** file.

This spreadsheet has information in columns A-C as follows:

- A: Participant ID
- B: Filled with the text FREE. The application will switch this text to SELECTED as each Participant ID has been accessed.
- C: Date and time stamp

- Create a new Excel file, and save it with the name "**Update**-date" for example:
PartID-Updated-9-30-10.xls
- Identify Free ID's (from the "**Archive**" file) to be moved to the **Update** file.

Selection of ID's to Move

All IDs that have a FREE (column B) will be moved.

Once you have identified which IDs qualify to be moved from **Archive** file, proceed as follows:

- From **Archive** file
Highlight rows to be cut. Select 'Cut' from right-click menu. Make sure you cut all the information in the row.
- Go to the **Update** file
Paste the rows into the file. Select 'Paste' from right-click menu.
- Make sure the information was transferred correctly.
Depending on the version of Excel, the cut might not move the information from the **Archive** file. Make sure that the information was moved not just copied.
- Save both files in the local system.
Move **Update** file into the thumb-drive so it can be transferred into the Handheld.
- Copy the **Update** file in the Handheld directory K:\participantIDS.
Make sure you have only one file in this directory. Relocate old file if necessary.



Step 5. AdditionalHHID

- The extra-household IDs file is stored in subdirectory K:\additionalhouseholdIDS (remember rules described in **Step 2**)
- Open the directory
- Save Excel file to Thumb-drive, using name convention "**Archive**-(date)"
For example: *AddHHID-Archive-9-30-10.xls*
- Transfer **Archive** file to FC local system for ease of use
- Open the **Archive** file.

This spreadsheet has information in columns A-F as follows:

A: Household ID

B: Blank

C: Blank

D: Filled with the text FREE. The application will switch this text to SELECTED as each Household ID has been accessed.

E: Date and time stamp

F: Original HH ID. Referred to as the "reference ID", this ID is the ID that is displayed on the main HHID pick list. This ID will appear more than once on the Excel spread sheet.

- Create a new Excel file, and save it with the name "**Update**-date" for example: *AddHHID-Archive-9-30-10.xls*
- Transfer the EXCEL spreadsheet to another computer for ease of modification.
- Identify Free ID's (from the "**Archive**" file) to be moved to the **Update** file.

Selection of ID's to Move

All IDs that have a FREE in Column D will be moved.

Once you have identified which IDs qualify to be moved from **Archive** file, proceed as follows:

- From **Archive** file
Highlight rows to be cut. Select 'Cut' from right-click menu. Make sure you cut all the information in the row.
- Go to the **Update** file
Paste the rows into the file. Select 'Paste' from right-click menu.
- Make sure the information was transferred correctly.
Depending on the version of Excel, the cut might not move the information from the **Archive** file. Make sure that the information was moved not just copied.
- Save both files in the local system.
Move **Update** file into the thumb-drive so it can be transferred into the Handheld.
- Copy the **Update** file in the Handheld directory K:\additionalhouseholdIDS. Make sure you have only one file in this directory. Relocate old file if necessary.

Note: For quality control purposes, have another person review the original spreadsheet and the updated spreadsheet to make sure IDs were not inadvertently cut from the spreadsheet. Only the Free IDs (as defined in the instructions) should be missing from the **ARCHIVE** file and they should be present in the **UPDATED** file.