

APPENDIX 5 -

Worksheet: Collection Data Review, Assessment, & Prioritization

The intent of this activity is to offer a structure on how to review your current data to identify the major issues and how to prioritize a clean-up project of your collection data. Before you view the information below, be sure to review section 3-4 of this guidebook.

SETTING THE SCENE

After working through sections 3-4 of this guidebook, you will have already accomplished the following

- Made decisions about what standards your organization is using (fields and content formats)
- Created your organizations data standards guide outlining specific information for each field and what and how information will entered into each field.
- Have your collection information ready to view in a comprehensive format such as a spreadsheet

Once all of that is in place, you ready to review your data.

REVIEWING & ASSESSING YOUR DATA

Using your organizations data standard guide and the review recommendations provided in section 4 of this guidebook, start working your way through your data and recording the issues you are finding. One logical way to do this is working field by field and document your findings based on the following criteria:

Does the field contain data?

Is the information accurate and complete?

Is the format of the data consistent?

There are different ways you can document your review and assessment:

- **Document narrative** by field note the issues related to the above questions, what actions to take, and priority level. You can see an example of a narrative assessment in the PastPerfect Case Study in Appendix 7
- **Spreadsheet format** with the following column heading suggestions. There is also a really great example of a spreadsheet like this in the PastPerfect Case Study, Appendix 8.

| ISSUE NUMBER | FIELD FOR CLEANUP | QUANTITY | PRIORITY | CLEANUP INSTRUCTIONS | ATTACHMENTS |
|--|-------------------|---|---|--|---|
| As you assess your data, document each field type where you're noticing data gaps or deficiencies when comparing actual data to your codified data standards document. If a you discover more than one issue in a field, mark each issue as a separate entry as you may have to take different approaches with each issue. | | Attempt to get an estimate of how many records are impacted by each issue. This will help you determine what's achievable for the available capacity of your staff. | Determine the level of priority for each item to the best of your ability. Things to consider when prioritizing | Cleanup will depend on the issue, staff knowledge and capacity, and the CMS. See section 5: Data Cleanup Strategies: Application for more information. | If there were any queries, reports, or other documentation you used for data assessment, make a note of them here so that any staff member can see if there's related documentation needed for effective cleanup. |

- **Table format** like the example on the next page can be helpful if you need to record it by hand while viewing the spreadsheet.

| Field Name | Circle the number that fits each statement based on how many records fit the criteria for the field. | Assign priority level (high, med., low) & justification |
|--|--|---|
| | Field contains data: 1 2 3 4 5 All Some None | |
| | Data is accurate & complete : 1 2 3 4 5 All Some None | |
| | Format is consistent: 1 2 3 4 5 All Some None | |
| What are the issues for this field and corresponding actions for cleanup? | | |
| Issue | Cleanup Instructions | |
| | | |
| | | |
| | | |

PRIORITIZATION

After your review and assessment, take a minute to assign prioritization to your cleanup tasks you have now created. Review “A note on Prioritization” at the end of Section 4 for how you might develop your own prioritization rubric. You may also want to review the PastPerfect Case Study in Appendix 7 to see how that organization assigned priority level to the issues.