



# Module 2



## Documenting and Improving Data System Processes

Welcome to Module 2 of the Data System Improvement Toolkit! If your tribal team wants to improve the current data system processes or document existing processes to ensure they are followed consistently, this module will be helpful. It helps you to develop program policies and a procedures manual.

This module addresses three actions a team interested in improving its system processes and documentation needs to do.

### **Understand and document where data are located in a system.**

Many program staff use a data system with automated reports. These reports can be valuable tools but often the data generated aren't accurate. Data mapping is the process of visually diagramming where data "live" in a data system. Data mapping can be a critical step to ensure reports are correct; it describes how data are connected across the system and helps you to understand which data the system uses to calculate report values.

### **Improve and document data quality processes.**

A data system is only as good as the quality and completeness of the data within it. Staff struggle with identifying missing data during data reporting. These issues can result in reporting inconsistencies across the staff.

### **Document and streamline data entry processes.**

Staff spend a great deal of time repeatedly entering the same collected data. Collecting data is often done inconsistently across staff. Documenting program data collection and entry processes for staff training can be helpful. The processes can be included in a policies and procedures manual. In addition, converting to a paperless data system may ease the data entry burden.

Understand and document where data are located in a system.

Tool	Type of tool	Description
2.1: Guide to Data Mapping	Guide  <i>Used with the Data Map Template</i>	This short guide provides an overview of data mapping and a step-by-step walkthrough of the process. After reading through the guide, your team can work with your data system vendor to better understand the system design before undertaking the task of mapping the system.
2.2: Data Map Template*	Template  <i>Used with the Guide to Data Mapping</i>	Once your team has reviewed the guide to data mapping and is ready to begin the process, this template can serve as a visual guide for the system. You will likely need to change the form names to align with your program.

Improve and document data quality processes.

Tool	Type of tool	Description
2.3: Guide to Data Cleaning	Guide	Data cleaning is a set of processes used to improve the quality and completeness of collected data. This document is a brief overview of the data cleaning process. It describes tasks for home visitors, supervisors, and data managers before and during data reporting.
2.4: Example of a Case File Checklist*	Example and Template  <i>Used with the Example of a Missing Data Report</i>	Checking individual case files to determine whether assessments and other data were collected completely and on time are critical steps in making sure data is high quality. This checklist is an example a supervisor can use to review an individual home visitor file. All examples can be edited to fit the needs of the program.
2.5: Example of a Missing Data Report*	Example and Template  <i>Used with Example of a Case File Checklist</i>	Once case files have been checked for quality and completeness, this information can be summarized in aggregate across the program with a missing data report. This document is an example of a report that would be developed by a data manager or supervisor to determine which data are missing prior to reporting.

Document and streamline data entry processes

Tool	Type of tool	Description
2.6: Data System Business Process Maps*	Example <i>Used with Technical Assistance Facilitation</i>	These maps provide a general example of Tribal MIECHV intake, on-going services, and reporting processes. They are meant to serve as an example and starting point for teams to build their own, agency-specific maps to be used for better documenting data collection and entry. The maps work best with a guided facilitation process.
2.7: Best Practices When Converting to a Paperless Data System	Guide	This brief guide presents potential problems and best practices for converting from a paper-based data collection and entry system to a paperless system that uses laptops or tablets.

Visit [www.tribaleval.org](http://www.tribaleval.org) to download individual tools from this toolkit. Those tools marked with an \* are available in modifiable forms (Word, Excel, or PowerPoint).