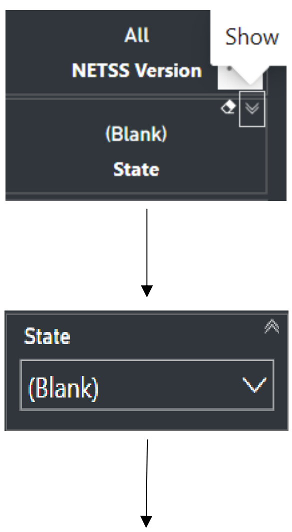
Intended use

The Power BI Edit Check dashboard was created for the purpose of the identification and revision of edit checks in case report data submissions specific to the reporting jurisdiction. Within the module, the edit checks are displayed in a manner that will facilitate a more thorough understanding of the fields containing errors. To ensure data security, the permissions associated with the accounts of end-users limit their scope of the data to errors relevant ~~only~~ to their jurisdiction. ~~The dashboard is meant to be used for unofficial communications such as briefing leadership or checking in with reporting jurisdictions. Data are not to be used for analyses or official outward-facing communications including manuscripts and presentations. Data for analyses or official outwardfacing communications should be requested from Melissa Pagaoa (mpagaoa@cdc.gov), SDSB Data Management Team Lead.~~

Layout

State Selection

The filters shown in the dashboard to the left allow~~s~~ end users to limit the description of edits needed to match certain criteria specified in the filters. To populate the table with relevant data for a state, the arrow icon next to state needs to be clicked:



Commented [YJ(1]: Additional suggestions:

1) Add a document title, e.g. Guide to Using the Edit Check Report
2) Format subheadings (e.g. see Styles section in Word)
3) Add a table of contents at the start of the document so that users can navigate to specific sections
4) Add page numbers
5) Add a section that shows a step-by-step walk-through of how an example jurisdiction may use this report when addressing edit checks for MMWR year 2022 (you'd probably want to show fictitious data).

Commented [YJ(2]: To identify and revise data quality issues

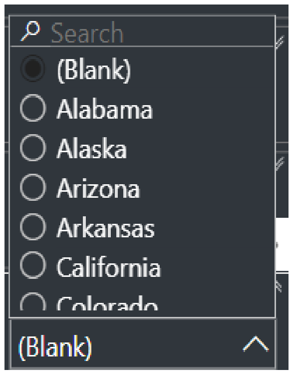
Commented [YJ(3]: Line-listed and summarized by edit check type to

Commented [YJ(4]: Row-level security ensures jurisdictions only see data

Commented [YJ(5]: Display of edit check types

Commented [YJ(6]: (In general suggest trying to use the active over passive voice). Instead of "the arrow icon … needs to be clicked", suggest

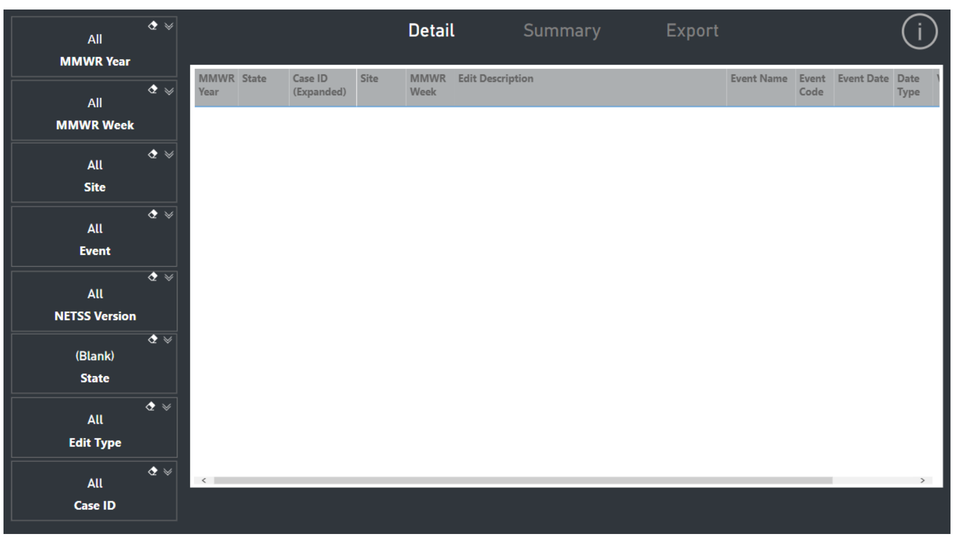
"Click the arrow icon next to state and select the state name from the dropdown menu."



After the selection of a state, the table will show available edit checks for that state. Note: As previously described, the data that is displayed in the dashboard is based on state-based permissions (e.g., Florida's state and local health department staff will only see Florida data), as per the permissions of each health department, the dropdown menu will, in most cases, be populated with only one state and its associated edit checks for selection.

Commented [YJ(7]: relevant

Commented [YJ(8]: For jurisdictions such as California, where there are multiple local health jurisdictions (LHJs) in addition to the overall state, would an individual LHJ see data for the entire state, or only for their LHJ?



Pages

This dashboard includes three pages, each of which serve slightly different purposes. Included among these is the "Detail" page, the "Summary" page, and the "Export" page. Each of these pages include a customized user interface and an interactive table to facilitate the identification and revision of errors from their affected sites.

Commented [YJ(9]: Suggest updating the screenshot and description here because the order of Summary and Detail have switched.

Commented [YJ(10]: By jurisdictions

Detail

Commented [YJ(11]: Maybe call this Detail Page?

The “Detail” page displays descriptive information for all identified errors within the same state. This page was originally created to be the default method of flagging the case submissions that require editing. In contrast to the “Summary” and “Export” pages, the number of submissions that can be shown on this page as needing revision can exceed Power BI’s upper limit of 30,000 rows that can be exported as a CSV table at a time. As a result, the main utility of the “Detail” page is as a tool for edit check exploration within Power BI utilizing the inbuilt tools for filtering the entire table to matching rows rather than exporting the entire table to a local file system. In circumstances where an external copy or summary of the identified edit checks is required for storage in local databases, the “Summary” and “Export” pages, as will be shown, are more appropriate.

Commented [YJ(12]: If you use “Detail Page” as the subheading, you could start with, “This displays…”

Commented [YJ(13]: Line-listed data quality issues for each

Commented [YJ(14]: Is it no longer the case?

Summary

Commented [YJ(15]: Suggest moving Summary Page section ahead of Detail. I think one potential benefit of showing the Summary Page first is that jurisdictions can use it to prioritize the investigation and resolution of data edit check types, e.g. starting with the highest frequency edit check types.

The “Summary” page displays the total frequency of each category of identified edit checks within a state by its corresponding MMWR year, site jurisdiction, and the implementation plan version inferred from the structure of the NETSS record layout. In circumstances where the “Detail” page table spans over 30,000 rows or includes thousands of errors of the same type, limiting the performance of the default table significantly, the “Summary” page, on the other hand, concisely displays the frequency of each category of error in the submitted data suitable for interpretation and exporting.

Export

Commented [YJ(16]: How does a jurisdiction export data?

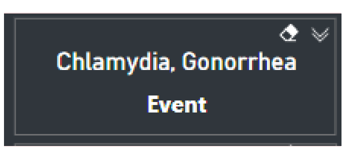
The “Export” page provides similar functionality as that of the “Detail” page while overcoming Power BI’s inherent 30,000 row export limit by splitting the table containing all edits into separate pages. For this purpose, edit checks were sorted by MMWR Year, Case ID, Site, and paginated by row number such that every page displays a maximum of 30,000 rows. As a result, the “Export” tab allows for the page-by-page exporting of all identified edits in circumstances where the required edits otherwise exceed the row limit for exporting from Power BI. Note: Unlike those of the “Display” tab, the filters found on the left of the page correspond specifically to the displayed table. That is, the options and descriptions of edit checks that can be found in each slicer are limited to what can be found on the current page. In circumstances where one would like the search the entire table for edit check matching specific conditions, the Detail table is generally more appropriate.

Commented [YJ(17]: Enumerated? Counted?

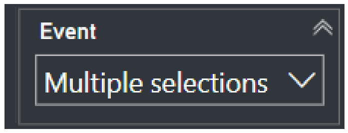
Commented [YJ(18]: Hmm, this is an important note (possibly worth bolding for emphasis), but also a bit confusing. It might be helpful to describe a specific use case.

Filters

With similar functionality to the filter used to select the state of interest, other filters displayed in the dashboard can be utilized to limit the displayed data to specific records. Each filter has two main components. The first is the card, of which displays all values selected from a variable to filter the table by:



and the second is the slicer, from which specific values can be chosen to filter the table:



Clicking the downward pointing arrow on a card will switch to the slicer while clicking the upward pointing arrow on the slicer will switch back to the card.

The eraser icon on the card, when clicked, allows the selected filter values to be reset such that filter conditions are removed from the table and all values are permitted for variables with multiple-selection. Each of the filters can work in tandem with other filters, allowing for customization of the data shown. Note that, as previously mentioned, the filters limit the entire range of the current table being displayed at any given point. For the "Display" and "Summary" tables, this includes all rows containing errors. In the case of the "Export" table, the filters only display and apply to values and characteristics of needed edits that can be found on the current page. As a result, each page has a specific use case in the identification of edit checks.

Data Considerations

The data shown in this dashboard specifically corresponds to the edit checks of case reports that have been identified as needing correction and/or review by their respective site. Only edit checks from the currently opened MMWR years will be displayed. As the Power BI module only displays currently identified issues corresponding to each site, as edit checks of records are addressed and resubmitted to the CDC, the edit check will no longer appear in the dashboard. For any questions, please contact the inquiry mailbox at std_surv_inquiry@cdc.gov.

Commented [YJ(19]: Not sure the reader needs to know the specific PowerBI terminology (card vs. slicer).

I think you could say something like: each filter can be displayed in two different ways: 1) Display the current selected values (indicated by the downward pointing arrow at the top right corner), or 2) Display of a dropdown menu enabling users to change their current selection (indicated by the upward pointing arrow at the top right corner)

Commented [YJ(20]: Suggest showing a screenshot

Commented [YJ(21]: This isn't very clear. Will the user's selection of filters on the first page be retained when navigating to the next page, or will the user need to reapply the filters page by page?

Commented [YJ(22]: How often are data updated? What is the schedule for updates, e.g. every Friday? (I know this is not yet known, but would be helpful to include these types of details when known).