

EHRs Data Harmonization Platform, an easy-to-use shiny app based on **recodeflow** for harmonizing and deriving clinical features

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Summary

Electronic health records (EHRs) contain important longitudinal information on individuals who have received medical care. Traditionally, EHRs have been used to support a wide range of administrative activities such as billing and clinical workflow, but, given the depth and breadth of clinical and demographic data they contain, they are increasingly being used to provide real-world data for research. Although EHR data have enormous research potential, the full realization of that potential requires a data management strategy that extracts from large EHR databases, that are collected from a range of care settings and time periods, well-documented research-relevant data that can be used by different researchers. Having a common well-documented data management strategy for EHR will support reproducible research and sharing documentation on research variables that are derived from EHR variables is important to open science. In this short paper, we describe the *EHRs Data Harmonization Platform*. The platform is based on an easy to use web app a publicly available at <https://poxotn-arian-aminoleslami.shinyapps.io/Arian/> and as a standalone software package at <https://github.com/ArianAminoleslami/EHRs-Data-Harmonization-Platform>, that is linked to an existing R library for data harmonization called **recodeflow**. The platform can be used to extract, document, and harmonize variables from EHR and it can also be used to document and share research variables that have been derived from those EHR data. We provide an example of how this platform is being used to create an environment where multiple research teams can access well-documented data from multiple EHR data sources to conduct reproducible research and where they can share research data sets and the research variables they have created to support open science. We also use a publicly available data set to demonstrate some of the key functions of the platform. We believe this platform can support the use of EHR data for high quality, reproducible research.

Statement of need

Electronic health records. Electronic health records (EHRs) are information systems that collect, store and provide data on healthcare to individuals in digital or electronic format (Kim et al. 2019). EHR data are typically collected at the time of healthcare encounters or when services are provided to individuals. These EHR data are collected in multiple care settings and across time and can be linked at the individual level to provide an aggregate description of care for an individual across time and service provider. Historically, these data have been used to support administrative functions such as billing, clinical information sharing and workflow management, but EHRs are increasingly being used to support health and health services research (Cowie et al. 2017; Chicco and Jurman 2020).

The data in EHRs typically include basic demographic facts such as date of birth and sex at birth, as well as data on diagnoses, treatments, results of clinical investigations, and outcomes such as hospital discharge or death. Information in EHR is collected at the individual level and using unique patient identifiers it is possible to create trajectories of multiple aspects of care and outcomes over time. These real-world data from EHRs could have enormous value to researchers who are interested in understanding health and disease, in identifying disease trajectories and evaluating disease risks and treatments using modern statistical and machine learning techniques (Cowie et al. 2017)

Using electronic health records for research. The process of making EHR data available for research can be divided into two main steps. The first step is the selection and description of the specific variables that the data custodian or owner makes available from the EHRs for research purposes and the second step is the process through which individual research teams select and modify variables that are made available to them. The first step allows the data custodians to select data elements that they feel are sufficiently well characterized and accurate enough to support the scientific research and importantly allows them to explicitly deal with concerns about protecting the privacy of individuals whose person health information is contained in the EHRs (Fortier et al. 2017). Typically, this aspect limits access to data elements such as date of birth or address that could identify individuals but can be extended to cover opportunities for re-identification through several variables none of which individually is identifying but that can be in combination.

This process typically results in the creation of data dictionaries that provide labels and descriptions of the available EHR data elements.

The data are often provided in different files from different care settings with different dictionaries. For example, hospital inpatient data in one file and outpatient prescription drug data in another file.

The second step in using EHR data for scientific purposes involves selecting the variables from those data sources that are relevant to a specific research project, and creating or deriving research study variables from the available data.

This step may vary from research team to research team.

For example, a research team focused on breast cancer might focus on using diagnostic codes from hospital inpatient data that identify individuals with different types of breast cancer and then linking to outpatient prescription drug data to identify the specific breast cancer treatments they receive, while a research team looking at emergency room waiting times might focus on data from emergency rooms and define waiting time as the time between registration and assessment. Both teams are drawing from the same publicly available data sources but are drawing on different data elements and creating or deriving research variables from those data elements. An important aspect of multiple research teams making use of common data sources is open science, the notion that science will progress faster if data and knowledge are shared (Burgelman et al. 2019).

We have developed a software platform that can support open science in the context of research using publicly available EHR data. The software platform draws on the data dictionaries that are provided to researchers who are accessing EHR data as the input to a process that allows different research teams to use a similar approach to documentation and harmonization of multiple EHR data sources so that the process for data selection and variable derivation can be standardized and shared.

Our proposed EHRs Data Harmonization Platform. The EHRs Data Harmonization Platform is an easy to use publicly available Shiny app that draws on an existing R library: `recodeflow`. The R library `recodeflow` was developed as an extension of `cchsflow` (Yusuf et al. 2021; Manuel et al. 2024) and itself relies on `sjmisc` (Lüdtke 2018). The platform creates shareable documentation of EHR data extraction and derivation that can not only support efforts to make research reproducible, but also will allow researchers to share strategies for data extraction and variable derivation. %In the following, we will first describe the idea of `recodeflow`, and then we will discuss that by using `recodeflow`'s core idea, how our platform contributes in harmonizing EHRs data.%

`recodeflow` and its components. Doug Manuel and colleagues (Yusuf et al. 2021) originally developed `cchsflow` as a standalone R package and they published it in the Comprehensive R Archive Network (CRAN) (Manuel et al. 2024). Starting from that specific case focused on Canadian Community Health Survey (CCHS) surveys' data, the same team developed a general version of this software library, called `recodeflow`, that is intended for any survey dataset and any EHR dataset. The authors released this R library in CRAN, too (Sequeira et al. 2024). `recodeflow` package is designed to enhance the reproducibility and standardization of data recoding processes. It leverages two critical components: the *variable details sheet* and the *variable sheet*.

The *variable sheet* serves as a repository for essential metadata, including variable labels, which are crucial for accurately interpreting data. This sheet ensures that descriptive information about each variable is consistently applied throughout the analysis, promoting clarity and consistency. The *variable details sheet* also

plays a pivotal role in recoding the dataset, as it contains valuable information about variable categories.

By harnessing the insights stored in these two spreadsheets, **recodeflow** empowers researchers to systematically and transparently recode their data, thereby enhancing the rigor and reproducibility of their analytical workflows.

How does the platform utilize **recodeflow and contributes in EHRs data harmonization?** Doug Manuel and his team built **chsflow** and **recodeflow** mainly on **sjmisc** (Lüdecke, Giné-Vázquez, and Bartel 2024), a popular R package aimed at recoding, dichotomizing or grouping variables, and for general data transformation (Lüdecke 2018). **sjmisc** is available both in CRAN and in Conda (Grüning et al. 2018). **recodeflow** performs variable harmonization and derivation, but does not provide a user interface: only software developers proficient in R can use it effectively.

Our platform not only helps in creating the above-mentioned spreadsheets in a user-friendly environment, but also gives the opportunity to users to implement the recoding process on their datasets by taking simple steps. It also documents all essential information (such as the functions' codes to create the derived variables and their names) and therefore, other researchers can reproduce an already existing work by only uploading the required documentation to the app.

To be more specific, non-recoded data can be imported to the app with various format such as CSV, SAS7BDAT, RDS, and SQLite.

There are also options to handle large datasets to be imported to the app in smaller chunks. Users can create a details sheet from scratch using the basic transformations available in **recodeflow** (for example, renaming a variable, creating a categories out of a continuous variable, etc.) or creating more complicated derived variables that has more than one components and needs functions to be coded. The platform then uses the information stored in the created spreadsheets to perform the curation on the dataset. The advantage of this standard approach is that once other users want to perform the same curation on a dataset, they don't need to create everything from scratch. These spreadsheets could be shared with other users, and they can upload them to the platform, modify them if needed, connect their non-curated database and reproduce the same curation on their database. The platform gives the flexibility to the users to save the curated database in various formats.

In line with the principles of open science (Kush et al. 2020), a range of R software libraries and programs are available for data harmonization. **retroharmonize**, specializes in survey data harmonization by creating a reusable metadata object that supports the generation of data dictionary, amongst other applications (Antal 2022; Antal et al. 2024). **DataHarmonizer** is an online platform that was created for genomics data but it can be used for other data. **DataHarmonizer** (Gill et al. 2023) builds on a new emerging open data model, **LinkML** that supports ontologies and transformations to other databases (LinkML 2024). **dxpr** integrates and preprocessing electronic health records, focusing on diagnostic and

procedure codes (Tseng, Chiu, and Chen 2021). Our EHR Data Harmonization Platform aims to make data transformation as easy as possible with a web-based interface to facilitate tasks that are common for all three applications, including data loading, common transformations, facilitating the generation and organization of R code for new, more complex derived transformation, and display of summary data and metadata. Other software programs aimed at harmonizing EHRs data exist (Zhou et al. 2022; Heavner et al. 2023; Kush et al. 2020), but none of them has become a standard tool in the medical environments worldwide.

Platform’s application

In this section, we explain the whole process of our harmonization platform by describing the complete workflow of its application as a tool for data curation and harmonization used by multiple independent research teams making use of a new EHR access environment. As part of its response to the COVID-19 pandemic, the Ontario provincial government, as the custodian of a large number of EHRs, established a new process through which research teams could access the EHR data in a secure high performance computing environment to conduct REB-approved research on the COVID-19 pandemic (Ontario Health Data Platform 2024a). The Ontario Health Data Platform at Queen’s (OHDP-Q) provided these researchers with access to an array of different types of EHR data and data dictionaries for each of these sources (Ontario Health Data Platform 2024b).

These EHRs data came from a range of settings including hospital care (Discharge Abstract Database, DAD), emergency room care (National Ambulatory Care Reporting System, NACRS), drug prescriptions (Ontario Drug Benefit, ODB) and physician visits (Ontario Health Insurance Plan, OHIP) collected over a 15-year period. These data came with data dictionaries for each source and meta data that described changes in variable descriptions for each source over time. Each research team conducting research in OHDP-Q had to submit a detailed research plan to the provincial government outlining their project and the EHR files that they would use.

The provincial government approved projects and the research teams agreed to adhere to policies around data access, privacy, and confidentiality.

Use of the EHR Data Harmonization Platform in OHDP-Q for EHR data extraction and harmonization. We agreed to support the creation of curated data for the research teams using the platform.

We met with the research support team and the research teams and with them we identified the variables that would be included in the curated data that would be available to the research team.

Some variables such as six-character postal code and full date of birth (that is, YYYY-MM-DD) were not extracted from the data for privacy reasons and replaced with less specific variables (that is, year of birth, first three characters of postal code). The researchers came to agreement on a set of core variables

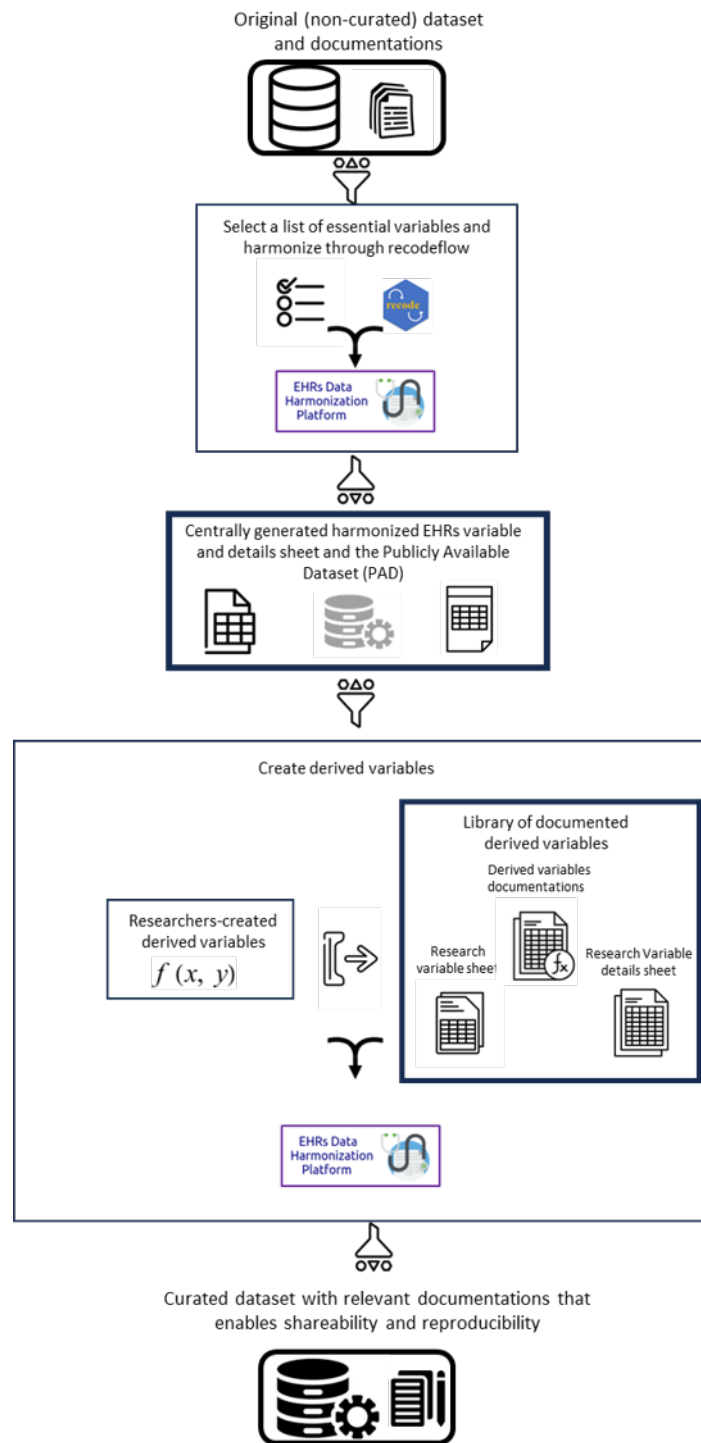


Figure 1: Flowchart representing how we utilized EHRs data curation platform to create a standard approach for data curation in OHDP-Q.

they wanted from each EHR source.

The platform was then used to select these variables and to recode the postal code and year of birth variables to their new formats.

There were changes in some of the variable names and in the coding for categorical variables over time. These changes were incorporated, and data were harmonized over time.

It was also agreed that the variable names would be changed from those provided in the sources EHR files to names for those variables that were commonly used by researchers in the province.

The end result of the process was a set of variable and variable details sheets that were used by the research support firm as inputs to the *recodeflow* process that when applied to the source EHR data produced the curated and documented data sets that were made available to the research teams data sets. The variable and variable details sheets were provided to the research team as data dictionaries for those curated data sets.

Use of the EHR Data Harmonization Platform in OHDP-Q for documentation of derived variables. The research teams in OHDP-Q are working in a common environment that allowed each team access to all the harmonized data sets for which they were approved. In this environment, each team can use the platform to select variables the team wants from each of these harmonized data sources and use those variables to create derived research variables. A derived variable in its simplest form can be constructed from a single harmonized variable. For example, a researcher team interested in identifying patients with breast cancer treated in hospital could use the variable that describes the diagnose for hospitalized patients from DAD using ICD-10 codes and then create a variable `breast_cancer` that is 1 if the ICD-10 code is C50 and 0 if any other diagnosis. Similarly, the research team might be interested in treatment of patients with a specific drug, say tamoxifen, and they could create a tamoxifen treatment variable that would take a value of 1 if patient was prescribed tamoxifen and 0 if not taking that drug using the ODB prescription data. A more complex derived variable can be created from two or more variables. For example, the team might want to identify breast cancer patients who were prescribed tamoxifen and could derive that variable from the previous two variables. The key feature is that derived variables are based on one or more existing variables based on specific rules or logic. The documentation of derived variables requires the names of the variables that are used in the creation of the derived variables and the function or rule that creates the derived variable. The platform has a feature that creates and documents derived variables. It is possible to share this documentation. Using the platform, research teams can create and document the derived variables they are using. They can then make that documentation available to other research teams. We have set up a derived variable library where research teams can store the documentation for the variables they create. If other researchers use as the basis for their documentation the same variable and variable detail sheets that define the shared curated data, they can use the platform to take the derived variable documentation from the library and apply

it to their data. Figure 1 illustrates our approach in OHDP-Q.

Examples

In this section, we'll show how the platform works by using it on the Paquid dataset of mental health records (Letenneur et al. 1994; Proust-Lima et al. 2024), publicly available within the `lcmm` R package on extended mixed models (Proust-Lima, Philipps, and Liqueur 2017). This Paquid dataset contains 2,250 observations (represented as rows in the dataset table) over 500 subjects and 12 variables (represented as columns in the dataset table). A patient can have multiple observations.

The variables include repeated cognitive measures (MMSE, IST, and BVRT psychometric tests), physical dependency (HIER) and depression symptomatology (CESD) collected over 20 years along with dementia information (age at dementia diagnosis, dementia diagnosis information) and time-independent socio-demographic information (CEP, male sex, initial age) (Letenneur et al. 1994; Proust-Lima et al. 2024). This dataset has 726 missing values, that is 2.69% of the total data instances.

Launching the Shiny app. Our Shiny app can be used via web browser by simply visiting the following website: <https://poxotn-arian-aminoleslami.shinyapps.io/Arian/>

Alternatively, users can decide to run the Shiny app on their personal computers:

1. Install RStudio (Allaire 2012) on your computer;
2. Download the GitHub repository from the URL we indicated, by clicking first on *Code* and then on *Download ZIP*, or by executing the following command in the shell terminal in Linux systems: `git clone https://github.com/ArianAminoleslami/EHRs-Data-Harmonization-Platform.git`;
3. Go to the **App** folder and open the `App_v2_1_0.R` file with RStudio;
4. On RStudio, click on Run App;
5. The Shiny app interface of the EHRs Data Harmonization Platform should appear on RStudio.

If you cannot install RStudio on your computer, you can go to the **App** folder and run the following command in a Linux shell console: `Rscript App_v2_1_0.R`

The platform should automatically install the possible missing software libraries and launch the Shiny app on a local IP address.

For example, on a Dell Latitude 3540 personal computer running a Linux Ubuntu 20.04.6 LTS operating system, the previous command generated an output log containing the following information:

Listening on `http://127.0.0.1:4897`

By opening this `http://127.0.0.1:4897` IP address with a traditional web browser such as Mozilla Firefox, it is possible to see and use the Shiny app.

An overview of the platform and its features. The shinyapp has 6 main tabs. The “Recodeflow” tab (Figure 2) is where we connect/upload the non_curated database and once we used the sidebar panel and updated *variable details sheet* and *variable sheet*, we can determine the output of the recoded dataset and start the recoding process by clicking on the *recoded* data. One important step in curation is to have information of how a variable really looks in a non-curated database. The *summary* tab (Figure 3) allows users to extract information about a variable in the database, see the distribution of different categories and have a better understanding of the variable they wish to recode. Finally, there’s the *derived variables documentation* tab that stores the information of derived variables which use a pre-programmed, custom function such as: the R code of the function and the name of the function.

The screenshot displays the 'EHRs Data Harmonization Platform' interface. On the left is a dark sidebar with a menu icon at the top. The sidebar contains several sections: 'Choose an optional name for your original dataset' with a text input 'DAD_2016'; 'Choose a variable to be recoded' with a dropdown menu showing 'Blood_Transfusion_numeri'; 'Type your preferred name of the variable in the recoded dataset' with an empty text input; 'Derived variable?' with radio buttons for 'Yes' and 'No' (selected); 'What is the type of variable in the original dataset?' with radio buttons for 'Categorical' and 'Continuous' (selected); 'What is the type of variable in the recoded dataset?' with radio buttons for 'Categorical' and 'Continuous' (selected); and 'Put missing values for the values out of a range?' with radio buttons for 'Yes' and 'No' (selected). At the bottom of the sidebar is an 'Add to table' button. The main content area has a light blue header with a hamburger menu icon and five tabs: 'Recodeflow' (active), 'Variable details sheet', 'Variable sheet', 'Summary', and 'Derived variables description'. Below the tabs, the 'Recodeflow' section contains: 'Please choose the format of your original dataset' with radio buttons for '.CSV', '.RDS', '.sas7bdat', '.SQLite' (selected), and 'pipe delimited (large datasets)'; 'Please enter the path to the database or dataset' with a text input 'C:\Users\arian\OneDrive\Documents\DAD.sqlite'; 'Please choose the name of the table in the database' with a dropdown menu showing 'Post_dad_2016_recoded'; an 'Update table names' button; 'Please enter your preferred name of the new recoded table in the database' with an empty text input; 'choose the size of chunk' with a text input '100000'; a large pink 'Recode the dataset!' button; and a 'Header of the table' button.

Figure 2: An example of a connected SQLite database that enables users to import, curate, and export data in chunks for the efficiency.

Renaming a variable and recode the categories. One of the most common curations in databases is to rename a variable. In our example, there’s a *male* variable in Paquid dataset which gets binary values of 0,1. We want to first

EHRs Data Harmonization Platform

Choose an optional name for your original dataset

DAD_2016

Choose a variable to be recoded

Main_Diagnosis_code

Type your preferred name of the variable in the recoded dataset

Derived variable?

☐ Yes
☒ No

What is the type of variable in the original dataset?

☐ Categorical
☒ Continuous

What is the type of variable in the recoded dataset?

☐ Categorical
☒ Continuous

Put missing values for the values out of a range?

☐ Yes
☒ No

Add to table

Recodeflow

Variable details sheet

Variable sheet

Summary

Derived variables description

Extract the variable

Main_Diagnosis_code

Length: 45000

Class : character

Mode : character

[1] "Distinct values: 58"

Frequency table

| Main_Diagnosis_code | n |
|---------------------|------|
| C50.011 | 1369 |
| C50.012 | 1308 |
| C50.019 | 1375 |
| C50.111 | 1372 |
| C50.112 | 1415 |
| C50.119 | 1295 |
| C50.211 | 1338 |
| C50.212 | 1335 |
| E03.9 | 678 |
| E11.9 | 693 |
| F78.9 | 463 |

Figure 3: The summary tab allows user to extract information about a variable they want to recode.

rename the variable to *sex* and then recode it so that 0 represents *Female* and 1 would be *Male*. To do so, we should first follow the following initial steps:

1. We upload the Paquid dataset by selecting .csv, clicking on *Browse*, and selecting the paquid.csv file on our computer. This CSV file is available within our GitHub repository (*Data availability* section);
2. (Optional) We call this dataset Paquid by writing it in the *Choose an optional name for your original dataset* field;

After these preliminary steps, we need to follow these steps:

3. Choose the *male* variable;
4. Type our preferred new name for the variable which is *sex*;
5. Choose the original and recoded data type which is Categorical to Categorical;
6. Enter the number of categories which is 2, and enter how categories should be recoded;

Once all these steps are done, we only need to add the information to the details sheet by clicking on the *add to table* button (Figure 4)

Derived variable from one variable, using built-in transformations: MMSE as category.

Choose an optional name for your original dataset

Choose a variable to be recoded

male

Type your preferred name of the variable in the recoded dataset

Derived variable?

☐ Yes
 ☒ No

What is the type of variable in the original dataset?

☒ Categorical
 ☐ Continuous

What is the type of variable in the recoded dataset?

☐ Categorical
 ☒ Continuous

Enter the number of categories

Original category 1

Original category 2

Final category 1

Final category 2

Recodeflow

Variable details sheet

Variable sheet

Summary

Derived variables description

Please choose the format of your original dataset

☒ .CSV
☐ .RDS
☐ .sas7bdat
☐ .SQLite

Please choose a csv file

| ID | MMSE | BVRT | IST | HIER | CESD | age | agedem | dem | age_init | CEP | male |
|----|------|------|-----|------|------|-------|--------|-----|----------|-----|------|
| 1 | 26 | 10 | 37 | 2 | 11 | 68.51 | 68.51 | 0 | 67.42 | 1 | 1 |
| 2 | 26 | 13 | 25 | 1 | 10 | 67.00 | 85.62 | 1 | 65.92 | 1 | 0 |
| 2 | 28 | 13 | 28 | 1 | 15 | 69.10 | 85.62 | 1 | 65.92 | 1 | 0 |
| 2 | 25 | 12 | 23 | 1 | 18 | 73.81 | 85.62 | 1 | 65.92 | 1 | 0 |
| 2 | 24 | 13 | 16 | 3 | 22 | 84.14 | 85.62 | 1 | 65.92 | 1 | 0 |

Do you want to add more columns from the original dataset to your recoded dataset?

Please choose the format of your recoded dataset

☒ .CSV
☐ .RDS

Let us explain a use case where a user would like to map the mini mental state examination (MMSE) numerical feature into an MMSE category in the Paquid dataset. In the original Paquid dataset, in fact, the MMSE comes as a number between 0 and 30, with higher scores indicating better cognitive function. We can categorize the total scores into ranges, such as:

- 0-9: severe cognitive impairment;
- 10-17: moderate cognitive impairment;
- 18-23: mild cognitive impairment (MCI);
- 24-30: normal.

Now we would like to create a new categorical feature that indicates these four pieces of information from the MMSE numerical variable. To do so, we can follow these steps:

1. We select *MMSE* in the *Choose a variable to be recoded* field;
2. We choose a name for the recoded variable (*MMSE_category*) and write it in the *Type your preferred name of the variable in the recoded dataset* field;
3. We enter 4 in the *Enter the number of categories* field;
4. We select No in the *Derived Variable* to state ours is not a derived feature;
5. We select *continuous* in the *what is the type of variable in the original dataset* to state that the input MMSE variable is numerical;
6. We select *categorical* in the *what is the type of variable in the recoded dataset* to state that our desired output MMSE category variable is categorical;
7. We indicate the intervals of the values of the input MMSE variable in the *Lowerbound 1*, *Upperbound 1*, ..., *Lowerbound 4*, and *Upperbound 4* fields: 0 and 9, 10 and 17, 18 and 23, and 24 and 30;
8. We indicate the corresponding new four categories of the MMSE category variable in the *Final category 1*, ..., *Final category 4* fields: severe cognitive impairment, moderate cognitive impairment, mild cognitive impairment, and normal, respectively;
9. We select 0 for the *Enter the row number to be deleted* field;
10. We click on the *Add to table* button;
11. In the *Do you want to add more columns from the original dataset to your recoded dataset?*, we select the names of all the original variables;
12. We click on the *Recode the dataset* button;

This is a good example to discuss how recodeflow handles missing values. recodeflow has a standard approach to handle missing values, by recoding missing data categories values into 3 NA values that are commonly used for most studies:

- NA(a) = ‘not applicable’
- NA(b) = ‘missing’
- Na(c) = ‘not asked’

In this example, we will specify that any categories other than what we specified, should be categorized as NA(b) or missing. Figure 5 shows the steps we followed for this example and how the missing values are handled in the details sheet. Note that labels and notes are not mandatory fields of the details sheet, so there

are no inputs for them on the app and users can modify them on the table's relevant cell if they prefer to.

EHRs Data Harmonization Platform

The screenshot shows the 'EHRs Data Harmonization Platform' interface. On the left is a dark sidebar with configuration options. The main area on the right has tabs: 'Recodeflow', 'Variable details sheet', 'Variable sheet', 'Summary', and 'Derived variables description'. The 'Variable details sheet' tab is active, showing a table with variable details.

Configuration Options (Left Sidebar):

- Choose an optional name for your original dataset:
- Choose a variable to be recoded:
- Type your preferred name of the variable in the recoded dataset:
- Derived variable? ☐ Yes ☒ No
- What is the type of variable in the original dataset? ☐ Categorical ☒ Continuous
- What is the type of variable in the recoded dataset? ☒ Categorical ☐ Continuous
- Lowerbound 1: Upperbound 1:
- Lowerbound 2: Upperbound 2:

Variable Details Sheet Table:

| variable | databaseStart | variableStart | typeStart | typeEnd | recStart | recEnd | catStartLabel | catLabel | catLabelLong | Notes |
|---------------|---------------|---------------|-----------|---------|----------|---------------------------------|---------------|----------|--------------|-------|
| MMSE category | paquid | paquid::MMSE | cont | cat | [0,9] | severe cognitive impairment | | | | |
| MMSE category | paquid | paquid::MMSE | cont | cat | [10,17] | moderate cognitive impairment | | | | |
| MMSE category | paquid | paquid::MMSE | cont | cat | [18,23] | mild cognitive impairment (MCI) | | | | |
| MMSE category | paquid | paquid::MMSE | cont | cat | [24,30] | normal | | | | |
| MMSE category | paquid | paquid::MMSE | cont | cat | else | NA:b | | | | |

Download .csv file!

Figure 5: An example showing how to categorize a continuous variable and how they appear in the details sheet.

Derived variable from two variables that needs custom functions: MMSE and CEP.

In this last use case, we will see an example of a derived variable with a pre-programmed, custom function. **recodeflow** supports use of any custom functions as long as the variable can be calculated on a per row basis. Let us suppose we would like to have a feature that indicates both the MMSE category and the education level of the patients, which is recorded in the dataset through the CEP factor. CEP = 1 means that the patient graduated from primary school, and CEP = 0 means she or he did not.

It might be useful to have a derived feature that indicates both the MMSE category and the CEP status (Table 1).

Table 1: Table of the MMSE-CEP values. Each patient can have one of these eight values for the derived variable MMSE-CEP.

| | severe cognitive | moderate cognitive | mild cognitive | normal |
|---------------------------|---|--|---|--|
| graduated | impairment severe cognitive | impairment moderate cognitive | impairment mild cognitive | condition normal condition |
| non- graduated | impairment and graduated severe cognitive | impairment and graduated moderate cognitive | impairment and graduated mild cognitive impairment | and graduated normal condition and non- graduated |

To generate this derived feature, we can use the `MMSE_category` variable we produced at the previous step, and we need to create a new recoded feature for CEP, too. As per rules of **recodeflow**, a derived variable can be created only from recoded variables.

We follow the steps described in the previous section and generate a recoded variable called *CEP_bin*, which has value *graduated* when CEP equals to 1 and has value *non-graduated* when CEP equals to 0.

To create a new derived feature based on `MMSE_category` and `CEP_bin`, we follow these steps:

1. We write *MMSE-CEP* in the Type your preferred name of the variable in the recoded dataset* field;
2. In the *Derived Variable?* field, we select Yes;
3. In the *Please enter the function's code* field, we insert R code of the function that needs to create the new feature. In our case:
`function(MMSE_category, CEP_bin) {return(paste0(MMSE_category,"_",CEP_bin));}`
4. We can write *MMSECEPfunction* in the *Please type the name of your function* field;
5. In the *Please choose the components of the derived variable* field, we select *MMSE_cat* and *CEP_bin*;
6. We select *categorical* in the what is the type of the derived variable?* field;
7. We select 0 in the *enter the row number to be deleted* field;
8. We click on *Add to table*;
9. In the central lower menu, we select all the features of the dataset in the *Do you want to add more columns from the original dataset to your recoded dataset?* field;
10. We finally click on *Recode this dataset!*;

11. At this point, the new column *MMSE-CEP* should appear in the header of the recoded dataset;
12. We click on “Download the recoded dataset!”* and save the dataset file in CSV format.

Figure 6 shows the steps as well as the updated details sheet.

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Choose an optional name for your original dataset

paquid

Type your preferred name of the variable in the recoded dataset

MMSE_CEP

Derived variable?

☒ Yes ☐ No

Please enter the function's code

```
function(MMSE_category, CEP_bin)
{
  return(paste0(MMSE_category, "_", CEP_bin));
}
```

Please type the name of your function

MMSECEPfunction

Please choose the components of the derived variable

MMSE_category CEP_bin

What is the type of the derived variable?

☒ Categorical ☐ Continuous

Recodeflow Variable details sheet Variable sheet Summary Derived variables description

Already have a .csv Variable Details sheet?

☐ Yes ☒ No

| variable | databaseStart | variableStart | typeStart | typeEnd | recStart | recEnd | catStartLabel | catLabel | catLabelLong | Notes |
|---------------|---------------|------------------------------------|-----------|---------|----------|--------|---------------|----------|--------------|---------------------------------|
| MMSE category | paquid | paquid::MMSE | cont | cat | [0,9] | | | | | severe cognitive impairment |
| MMSE category | paquid | paquid::MMSE | cont | cat | [10,17] | | | | | moderate cognitive impairment |
| MMSE category | paquid | paquid::MMSE | cont | cat | [18,23] | | | | | mild cognitive impairment (MCI) |
| MMSE category | paquid | paquid::MMSE | cont | cat | [24,30] | | | | | normal |
| MMSE category | paquid | paquid::MMSE | cont | cat | else | | | | | NA:cb |
| CEP_bin | paquid | paquid::CEP | cat | cat | 0 | | | | | non_graduated |
| CEP_bin | paquid | paquid::CEP | cat | cat | 1 | | | | | graduated |
| CEP_bin | paquid | paquid::CEP | cat | cat | else | | | | | NA:cb |
| sex | paquid | paquid::male | cat | cat | 0 | | | | | Female |
| sex | paquid | paquid::male | cat | cat | 1 | | | | | Male |
| sex | paquid | paquid::male | cat | cat | else | | | | | NA:cb |
| MMSE_CEP | paquid | DerivedVar::MMSE category, CEP_bin | cont | cat | else | | | | | Func::MMSECEPfunction |

Download .csv file!

Figure 6: Steps needed to create a variable derived from more than a variable and the updated details sheet..

At the end of this procedure, we obtain a new version of the dataset containing the MMSE-CEP variable that puts into relationship the mental health category and the education level of each patient. You can see the comparison between the original and curated data set in Figure 7.

| ID | CEP | male | MMSE |
|----|-----|------|------|
| 1 | 1 | 1 | 26 |
| 2 | 1 | 0 | 26 |
| 2 | 1 | 0 | 28 |
| 2 | 1 | 0 | 25 |
| 2 | 1 | 0 | 24 |
| 2 | 1 | 0 | 22 |

| ID | CEP_bin | sex | MMSE category | MMSE_CEP |
|----|-----------|--------|---------------------------------|---|
| 1 | graduated | Male | normal | normal_graduated |
| 2 | graduated | Female | normal | normal_graduated |
| 2 | graduated | Female | normal | normal_graduated |
| 2 | graduated | Female | normal | normal_graduated |
| 2 | graduated | Female | normal | normal_graduated |
| 2 | graduated | Female | mild cognitive impairment (MCI) | mild cognitive impairment (MCI)_graduated |

Figure 7: The comparison between the original (top) and downloaded curated version of Paquid dataset (bottom).

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