

BBH SOC Data Collection and Management System

Epi Info and SQL Server Express 2019 Installation and Configuration Guide

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Background

West Virginia University's (WVU) Office of Health Affairs will be utilizing data collection software called Epi Info. The West Virginia System of Care Evaluation Data Collection and Management System will be used to collect and securely store sensitive health information from children and families receiving services from the Bureau for Behavioral Health's System of Care grant recipients.

For more information about this program, links to download software, and other related documentation, please visit the BBH System of Care web page at

<https://dhhr.wv.gov/BBH/data/Pages/Epi-Info.aspx>

To use the data collection system, providers will need to download and install the following items before reporting their data. To download these, please refer to the BBH System of Care web page.

- **CDC Epi Info.** Epi Info is a data collection tool developed by the Centers for Disease Control and Prevention (CDC). BBH has developed a modified version of the software to better facilitate installation and data transfer.
- **Microsoft SQL Server Express 2019.** SQL Server Express is a free version of Microsoft's SQL Server database software. Epi Info will use this database software to store entered data.
- **Additional BBH SOC Project files.** Once the applications above are installed, the project files will install the necessary Epi Info forms on your computer to allow you to start entering data.

This guide documents how to install and configure these programs. Users will need to refer to the **BBH SOC User Guide** (on the BBH System of Care web page) to learn how to navigate and enter data in the forms within Epi Info.

Please be sure to provide this installation guide to any IT personnel that is assisting you with the installation and configuration of the software, so they have the instructions available to them.

Installing the Epi Info Software

What is Epi Info?

Epi Info is a statistical software developed by Centers for Disease Control and Prevention to assist data collection. It provides easy data entry form and database construction, a customized data entry experience, and data analyses with epidemiologic statistics, maps, and graphs for public health professionals. There are a series of forms within Epi Info that you can create and edit records for each grant, client, and program-specific activity and events within the SOC.

System Requirements

Epi Info will only run on computers that use the Microsoft Windows operating system. We strongly recommend only using versions of Windows that are currently supported by Microsoft. Epi Info will not run on Apple OS, or mobile devices.

How to Download the Epi Info Software

The version of Epi Info that is required for BBH SOC is only available from the **BBH SOC web page**.

Note: there is a version of Epi Info that is available from the CDC website. This version is not supported by BBH, and you will *not* be able to successfully enter and submit data unless you use the version of Epi Info that is available from the BBH SOC web page.

How to Install the Epi Info Software

Once you have located the download link on the BBH SOC web page, please follow these steps to install the application. If you have an older version of Epi Info installed, refer to the section below “How to Uninstall the Epi Info Software” before continuing:

1. Click the “CDC Epi Info” link to download the Epi Info software. The file is very large, so the download may take a few minutes. The download file is in .zip format.
2. Once the file is downloaded, locate the file, and unzip (extract the file to your hard drive). To unzip, right click on the file and click “Extract All”.
3. When asked where to extract the files to, please select a location on your hard drive that you will remember, such as C:\Epi Info\. Please do **NOT** store this under C:\Program Files, else depending on your setup, Windows may prevent you from accessing the extracted files. If the folder does not exist, it will be created when extracting the files.
4. **Note:** The folder where Epi Info is installed should **NOT** be the same folder that is used in the section below “Create a Folder for SOC Epi Info Project Files”. The Epi Info software should be in a different folder than the SOC Epi Info project files.

To confirm that Epi Info has been installed correctly:

1. Locate the folder where you extracted the zip file above. You should see a file called “Launch Epi Info 7.exe”.
2. Double click on “Launch Epi Info 7.exe”
3. You will see the Epi Info launch screen open (see below)



How to Uninstall the Epi Info Software

If you already have Epi Info installed, but need to install a newer version:

1. Locate the folder on your computer where the Epi Info software is installed (C:\Epi Info, or similar). You should see the “Launch Epi Info 7.exe” file.
2. Delete all files and folders that exist in this folder. You can leave the C:\Epi Info folder in place and use it for the new installation.

SQL Server Express 2019

What is SQL Server Express?

SQL Server 2019 Express is a free edition of Microsoft's powerful SQL Server. It is ideal for development and production use for desktop, web, and small client server applications like this one. Although Epi Info does work with Microsoft Access, that configuration is not supported by BBH for this data collection effort as performance is not acceptable. By configuring Epi Info to use SQL Server Express it greatly speeds up the entering of data for all users.

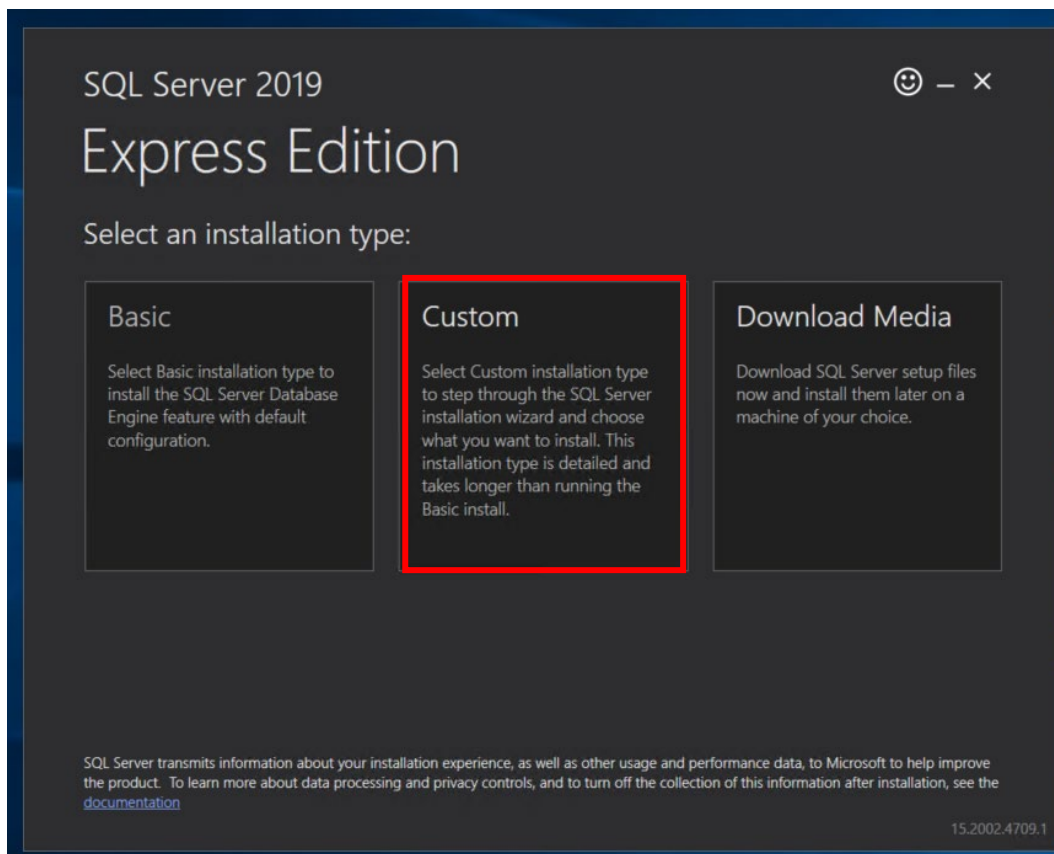
How to Download SQL Server Express

Microsoft SQL Server Express can be downloaded from the Microsoft web site. Please use the link located on the **BBH SOC web page** (<https://dhhr.wv.gov/BBH/data/Pages/Epi-Info.aspx>)

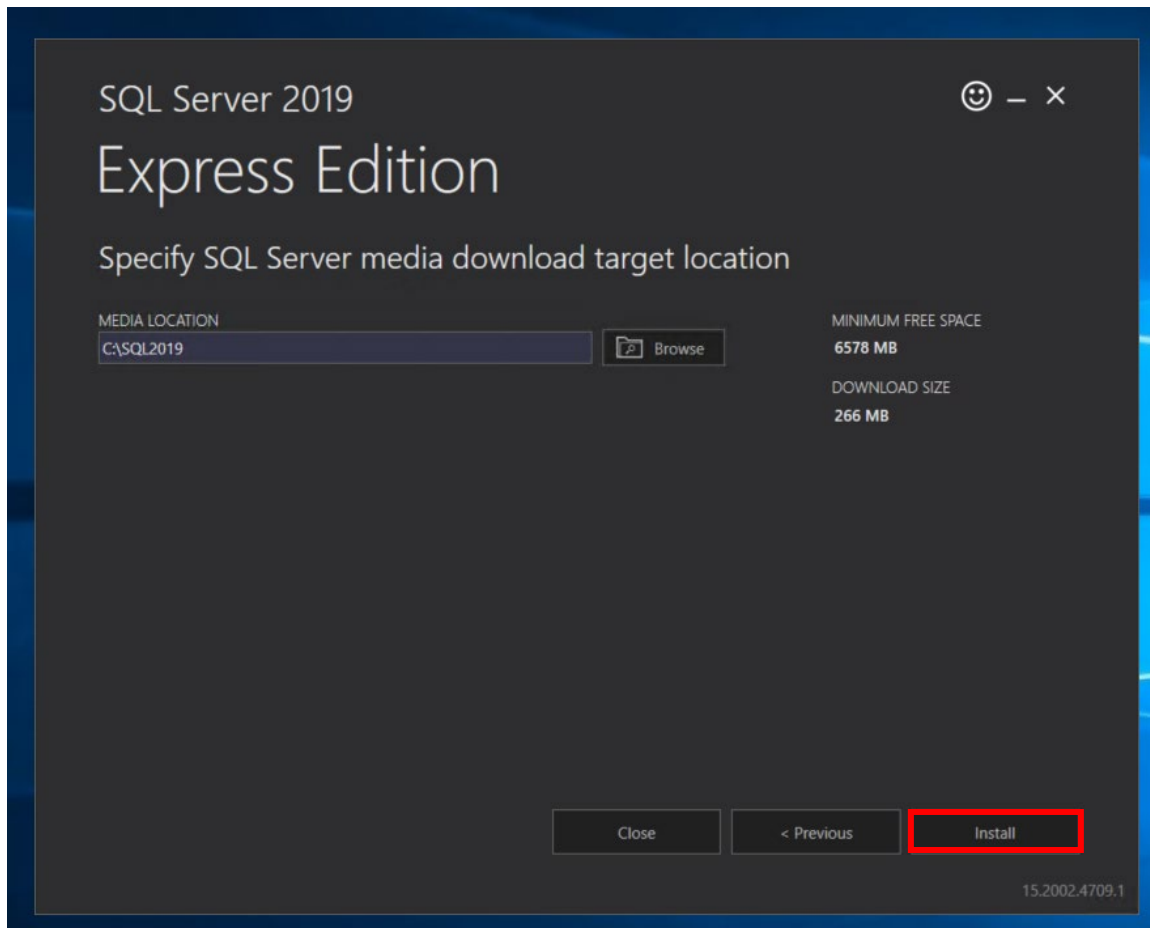
How to Install SQL Server Express

Once you have located the download link on the BBH SOC web page, please follow these steps to install the application.

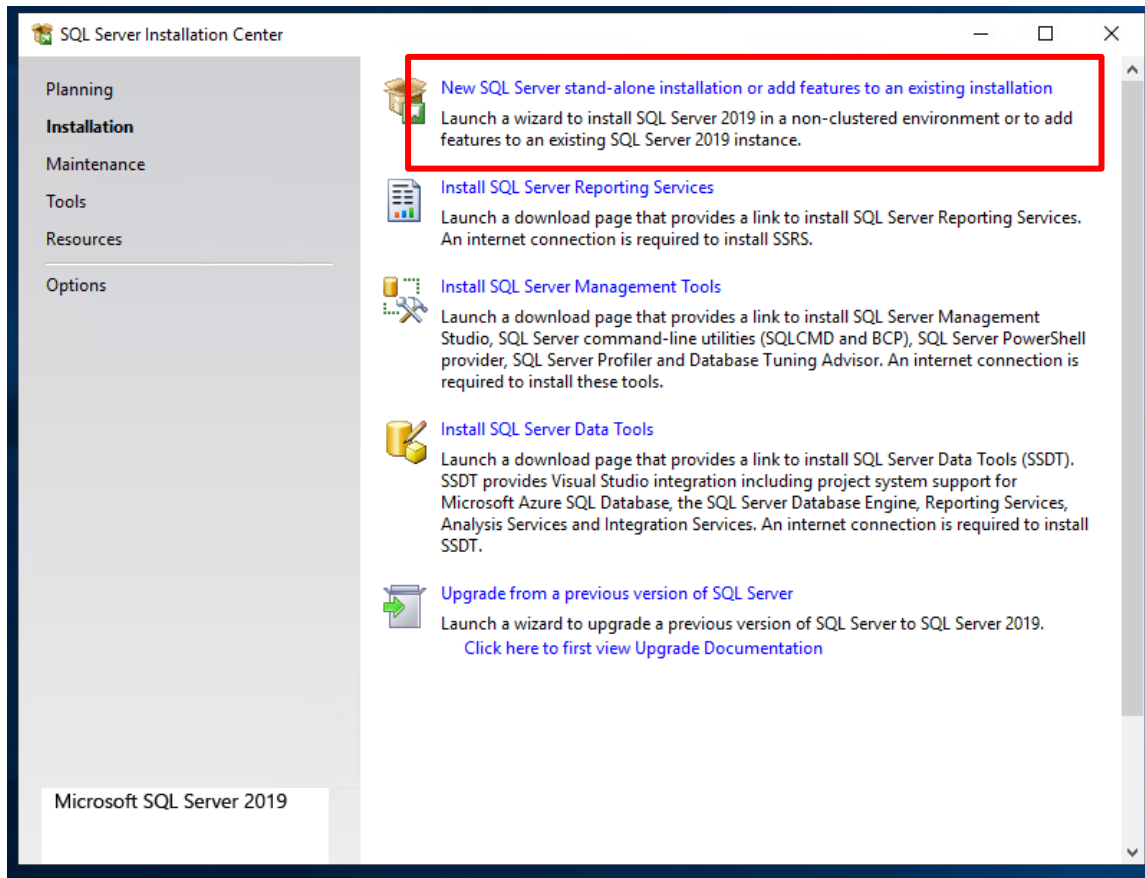
1. Click the "Microsoft SQL Server Express 2019" link to download the software.
2. Once the file has downloaded in your browser, click the file to begin the installation.
3. Select "Custom"



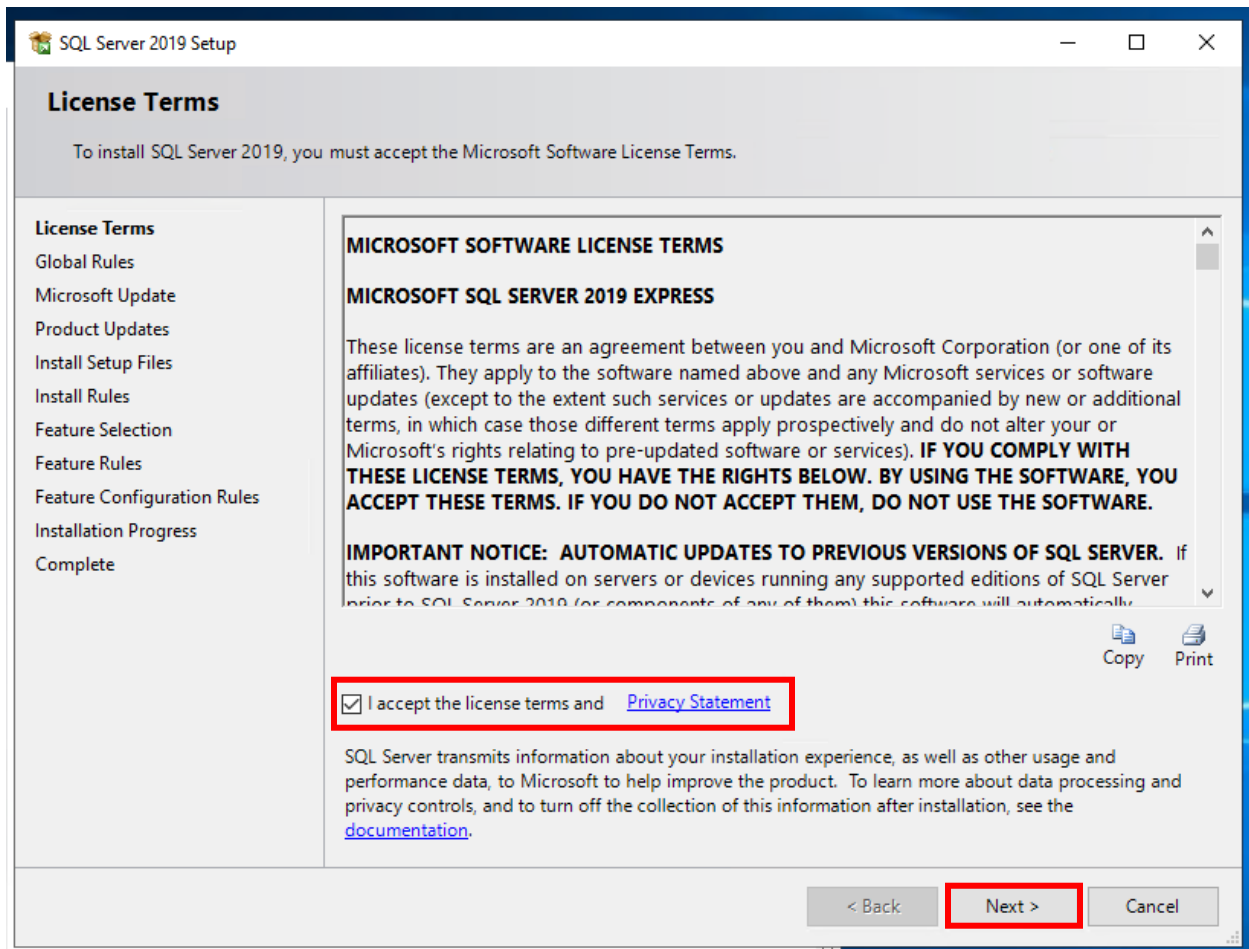
4. Click "Install" to continue.



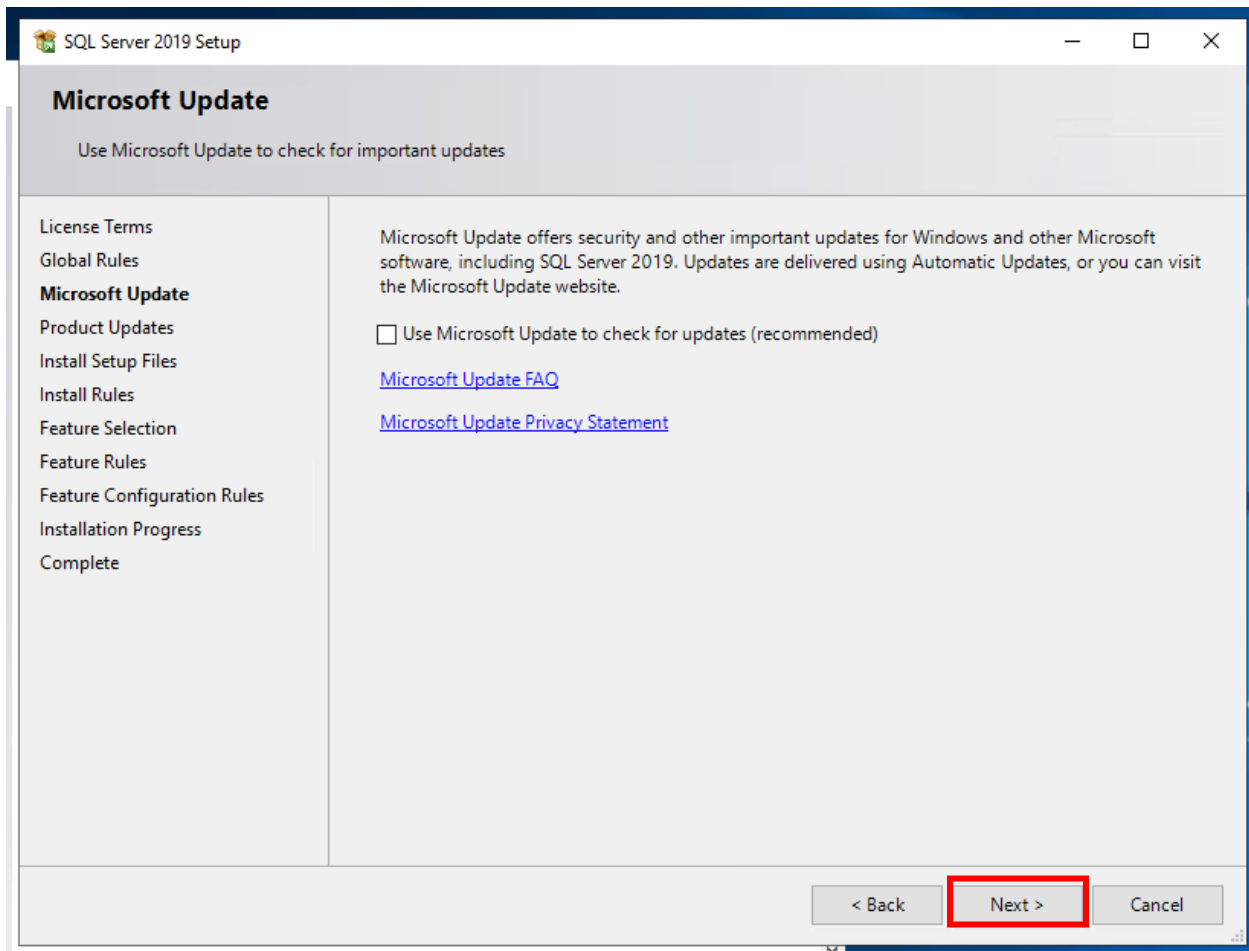
5. Click the first link "New SQL Server stand-alone installation or add features to an existing installation".



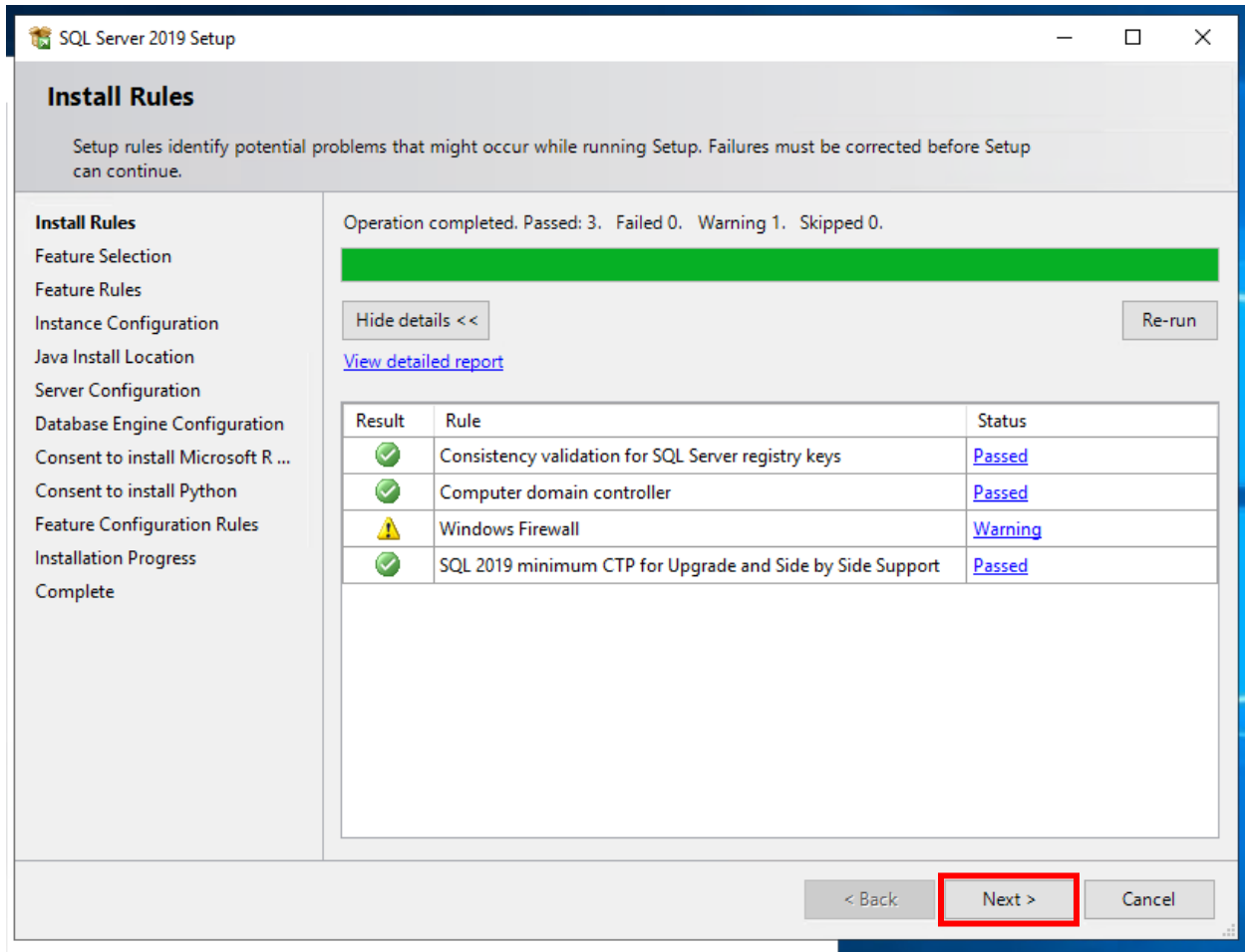
- Click the "I accept the license terms and ..." checkbox to accept the terms and conditions.



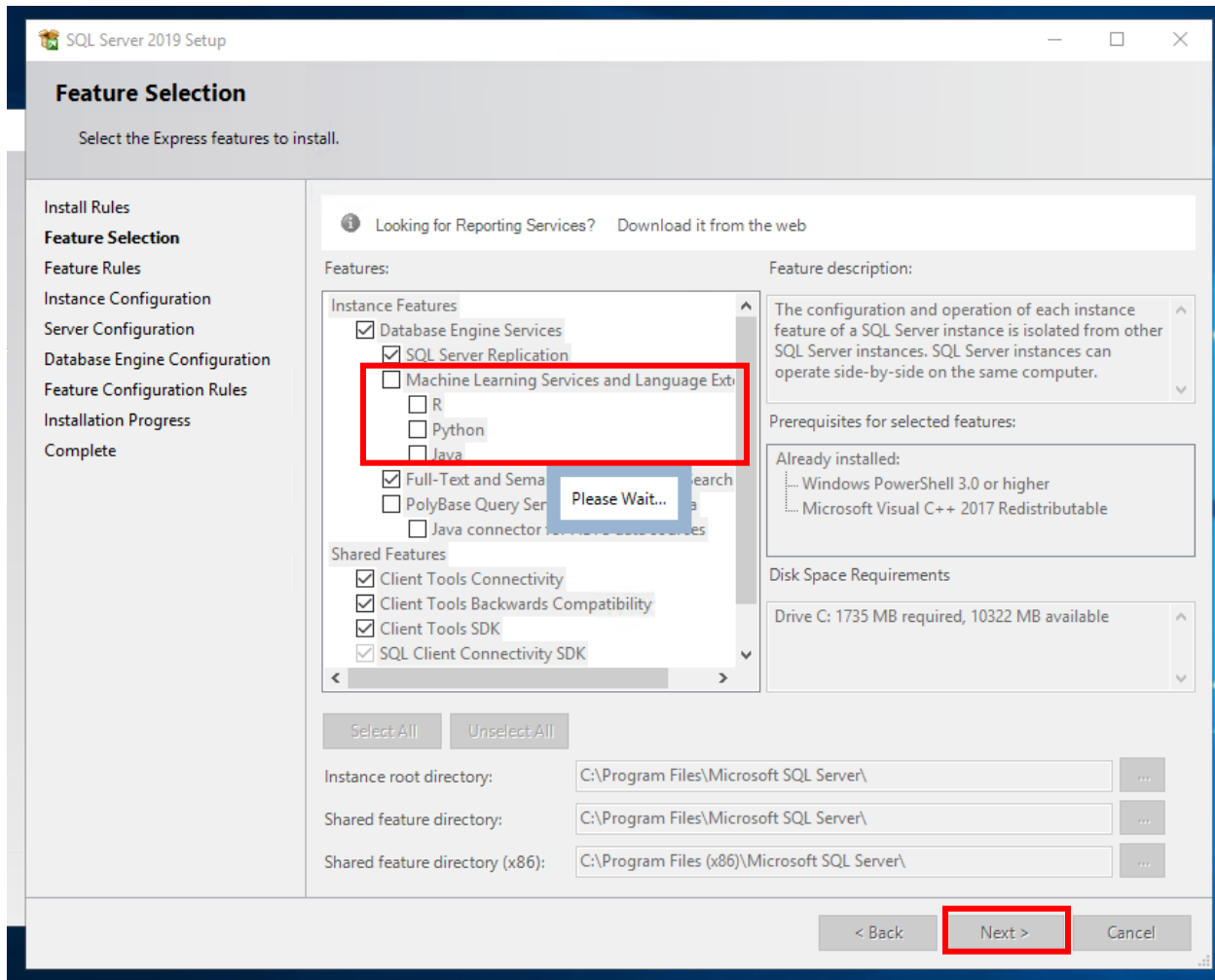
7. Click "Next"



8. Click "Next" to continue.



9. Uncheck "Machine Learning Services and Language Ext..." checkbox.
10. Click "Next" to continue.



11. Click "Next" to continue.

SQL Server 2019 Setup

Instance Configuration

Specify the name and instance ID for the instance of SQL Server. Instance ID becomes part of the installation path.

Install Rules
Feature Selection
Feature Rules
Instance Configuration
Server Configuration
Database Engine Configuration
Feature Configuration Rules
Installation Progress
Complete

☐ Default instance

☒ Named instance:

Instance ID:

SQL Server directory: C:\Program Files\Microsoft SQL Server\MSSQL15.SQLEXPRESS

Installed instances:

Instance Name	Instance ID	Features	Edition	Version
---------------	-------------	----------	---------	---------

< Back **Next >** Cancel

12. Click "Next" to continue.

SQL Server 2019 Setup

Server Configuration

Specify the service accounts and collation configuration.

Install Rules
Feature Selection
Feature Rules
Instance Configuration
Server Configuration
Database Engine Configuration
Feature Configuration Rules
Installation Progress
Complete

Service Accounts Collation

Microsoft recommends that you use a separate account for each SQL Server service.

Service	Account Name	Password	Startup Type
SQL Server Database Engine	NT Service\MSSQL\$SQLEXP...		Automatic
SQL Full-text Filter Daemon Launcher	NT Service\MSSQLFDLaunc...		Manual
SQL Server Browser	NT AUTHORITY\LOCAL SER...		Disabled

☐ Grant Perform Volume Maintenance Task privilege to SQL Server Database Engine Service

This privilege enables instant file initialization by avoiding zeroing of data pages. This may lead to information disclosure by allowing deleted content to be accessed.

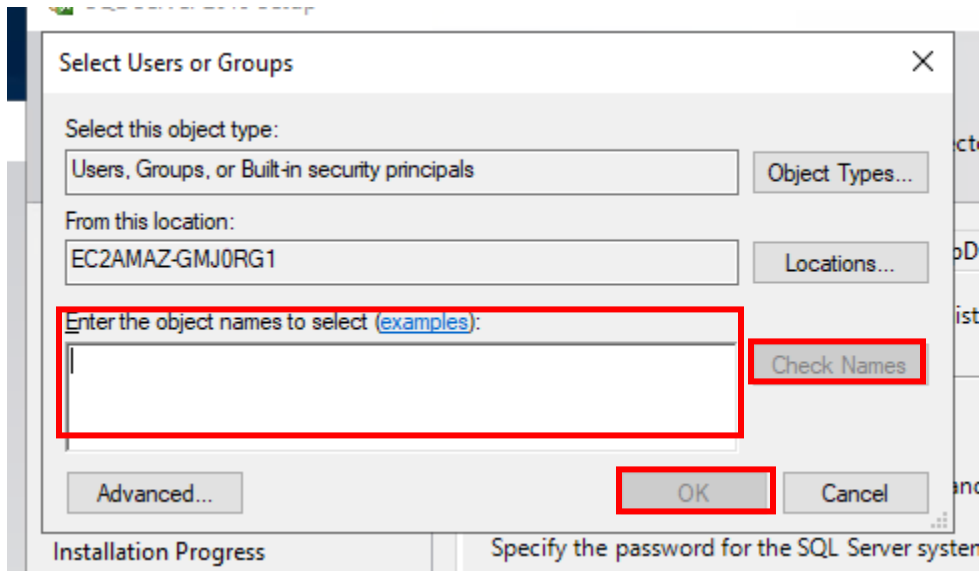
[Click here for details](#)

< Back **Next >** Cancel

13. Click "Add" button to add a user as an administrator. "Select Users or Groups" dialog will appear.

The screenshot shows the 'SQL Server 2019 Setup' window, specifically the 'Database Engine Configuration' step. The left sidebar lists various configuration options, with 'Database Engine Configuration' currently selected. The main area is divided into tabs: 'Server Configuration', 'Data Directories', 'TempDB', 'Memory', 'User Instances', and 'FILESTREAM'. The 'Server Configuration' tab is active, displaying instructions to 'Specify the authentication mode and administrators for the Database Engine.' Under 'Authentication Mode', 'Windows authentication mode' is selected. Below this, there are fields for 'Specify the password for the SQL Server system administrator (sa) account', including 'Enter password:' and 'Confirm password:'. The 'Specify SQL Server administrators' section contains a list box with one entry: 'EC2AMAZ-GMJ0RG1\Administrator (Administrator)'. To the right of this list box is a note: 'SQL Server administrators have unrestricted access to the Database Engine.' At the bottom of the list box are three buttons: 'Add Current User', 'Add...', and 'Remove'. The 'Add...' button is highlighted with a red rectangular box. At the very bottom of the window are navigation buttons: '< Back', 'Next >', and 'Cancel'.

14. Enter the windows account username in "Enter the object name to select" textbox.
IMPORTANT: This is the windows account name of the user that will be entering data. If you are the one that will be entering data with Epi Info, put your windows username. If you are an administrator that is installing SQL Server on behalf of another user, put their windows username.
15. Click "Check Names" button to verify the username.
16. Click "OK" to continue.



17. The newly added username should be listed on the "Specify SQL Server administrators" box.
18. Click "Next" to continue.

SQL Server 2019 Setup

Database Engine Configuration

Specify Database Engine authentication security mode, administrators, data directories, TempDB, Max degree of parallelism, Memory limits, and Filestream settings.

Install Rules
Feature Selection
Feature Rules
Instance Configuration
Server Configuration
Database Engine Configuration
Feature Configuration Rules
Installation Progress
Complete

Server Configuration | Data Directories | TempDB | Memory | User Instances | FILESTREAM

Specify the authentication mode and administrators for the Database Engine.

Authentication Mode

☒ Windows authentication mode
☐ Mixed Mode (SQL Server authentication and Windows authentication)

Specify the password for the SQL Server system administrator (sa) account.

Enter password:
Confirm password:

Specify SQL Server administrators

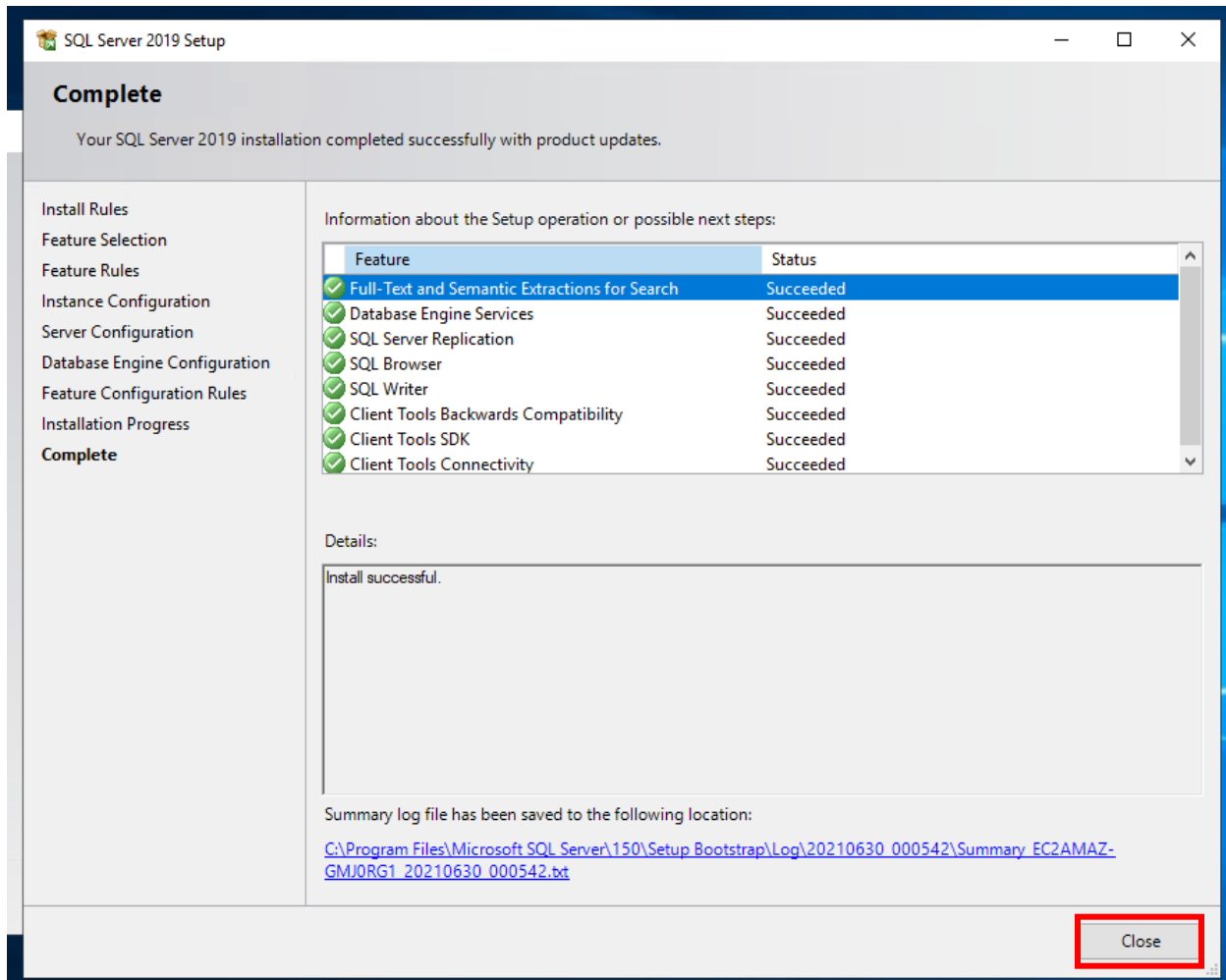
EC2AMAZ-GMJ0RG1\Administrator (Administrator)
EC2AMAZ-GMJ0RG1\ashrestha (ashrestha)

SQL Server administrators have unrestricted access to the Database Engine.

Add Current User | Add... | Remove

< Back | **Next >** | Cancel

19. Installation completed.
20. Close all open windows.



Installing the BBH SOC Project Files in Epi Info

Once you have Epi Info and SQL Server Express installed, this section will guide you through setting up the SOC forms that will allow you to enter data.

Note: If you already have a previous version of the forms working on your computer (for example, from testing, or training), you will need to remove those before continuing with the steps below. Please go to the section below titled “Uninstalling Data Collection Forms” first. Please note that **uninstalling forms will remove all data you have entered**.

Create a Folder for SOC Epi Info Project Files

You will have to create a folder on your computer (or shared drive) to place the Epi Info project files.

- We suggest c:\SOC Epi Info Project, or something similar.
- It is very important to note that this folder is different from the folder where you installed Epi Info in the section above “How to Install Epi Info”. When completing the steps in this section you must place files in a different folder from where you installed Epi Info earlier.

How/where to Download SOC Data Project Files?

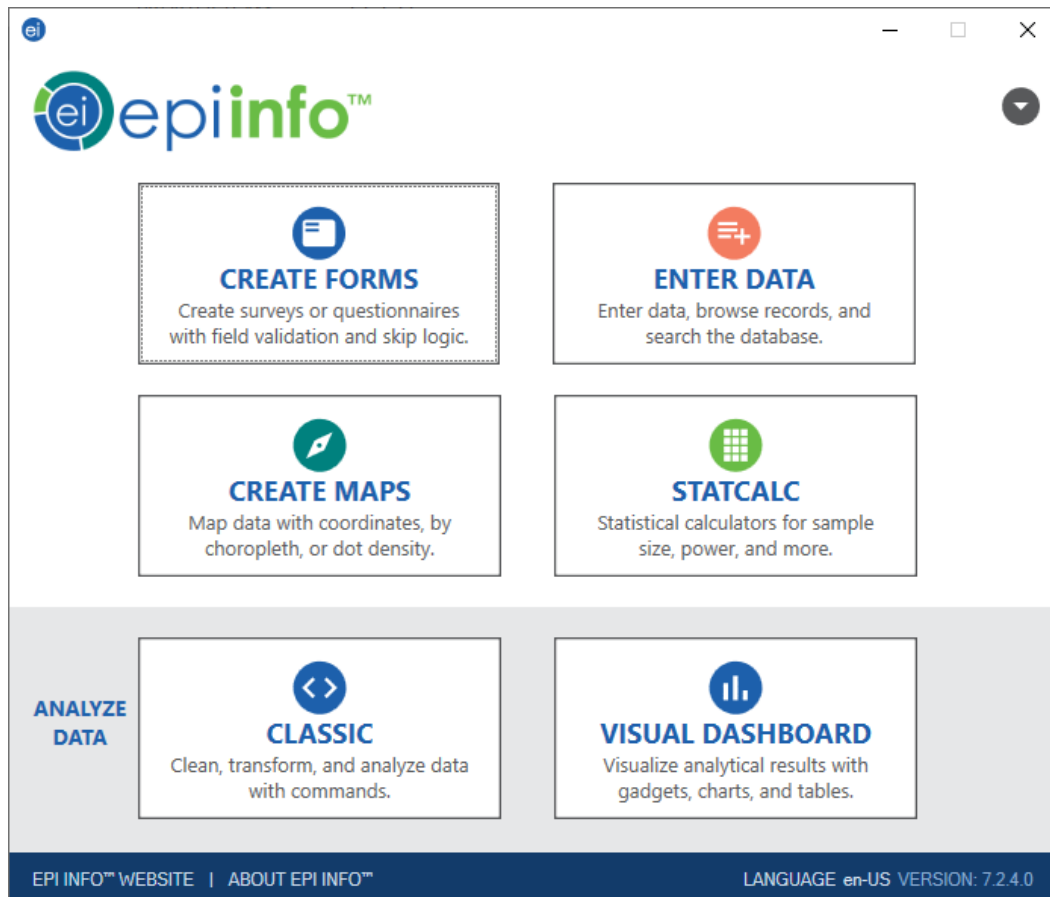
Once you have located the download link on the BBH SOC web page, please follow these steps to download the project files:

1. Click the “**BBH SOC Epi Info Project Files**” link to download the project files. The download file is in .zip format.
2. Once the file is downloaded, locate the file, and unzip (extract the file to your hard drive). To unzip, right click on the file and click “Extract All”.
3. When asked where to extract the files to, please select the folder that you created in the steps above “Create a Folder for SOC Epi Info Project Files” (c:\SOC Epi Info Project).

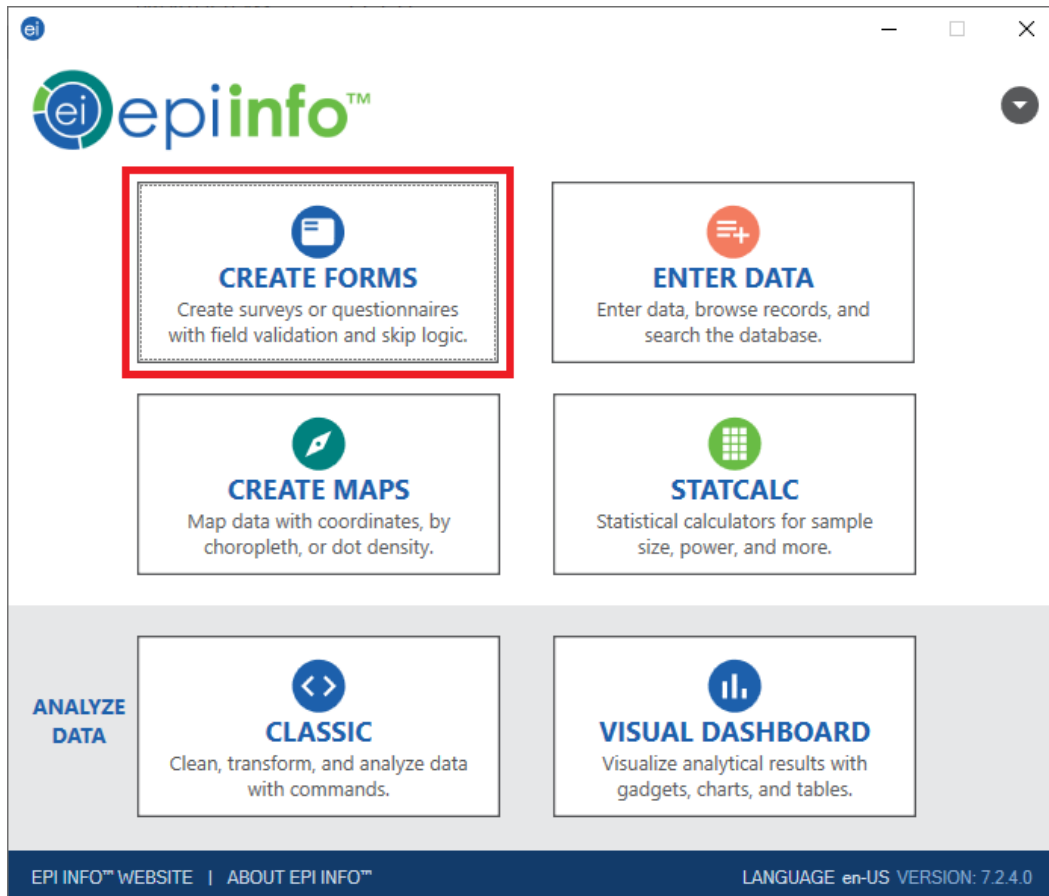
How to Install the SOC Epi Info Project Files

The steps below will walk you through setting up the Epi Info forms that you will use for data entry. Please note that if you already have a version of the forms on your workstation, you will need to uninstall these – refer to the “Uninstalling Data Collection Forms” section below.

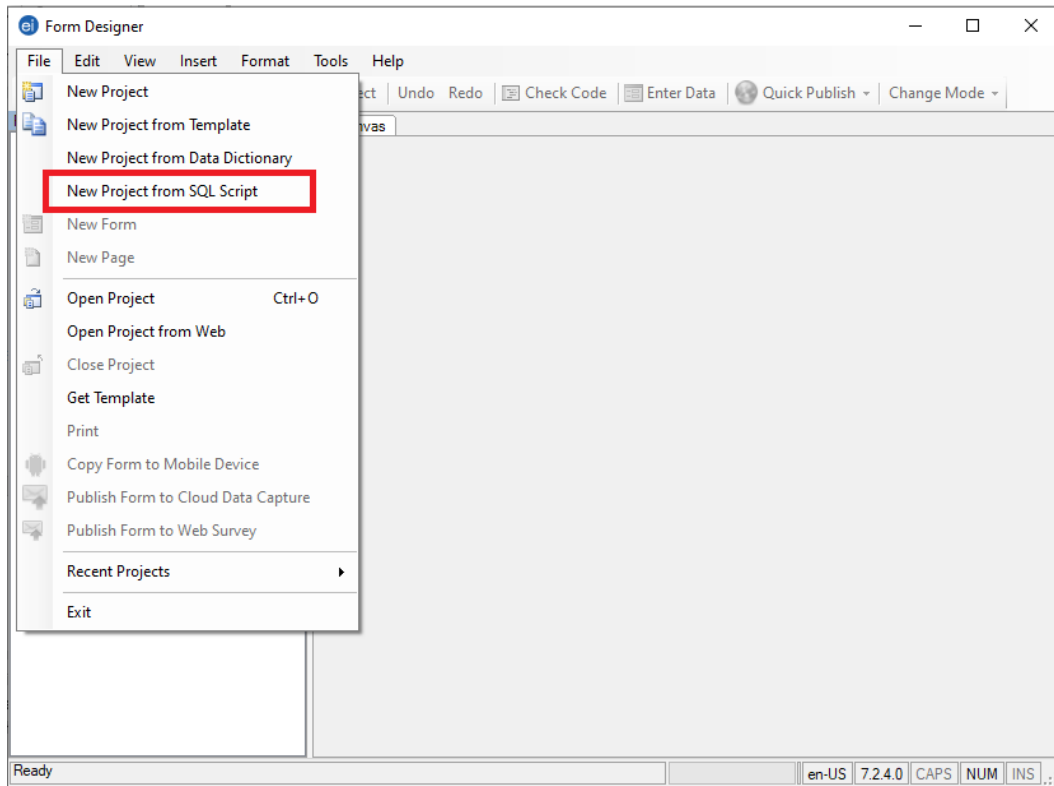
1. Open Epi Info. You will need to locate the Epi Info program that you installed in the “Installing Epi Info” section above. It may be the folder “C:\Epi info” or something similar. If you see the file “Launch Epi Info 7.exe”, double click on it to launch the software. You should then see the main Epi Info screen below.



2. Click on Create Forms



3. From the File Menu, click “New Project from SQL Script”. If you do not see this option under the File menu, then you do not have the correct version of the Epi Info software installed. Please refer to the section “Installing Epi Info” at the beginning of this document before returning to this step.



4. A popup box entitled “New Project from SQL Script” should appear.

The screenshot shows a Windows-style dialog box titled "New Project from SQL Script". It contains three main sections: "Script", "Data", and "New Project".

- Script Section:** Includes a "Location" text input field and a "Browse" button.
- Data Section:** Includes a "Data Repository" dropdown menu currently set to "Microsoft SQL Server Database", an empty text input field, and a "Browse" button.
- New Project Section:** Includes a "Name" text input field, a "Location" text input field containing the text "C:\SOC Epi Info Project", and a "Browse" button.

At the bottom of the dialog are three buttons: "OK", "Cancel", and "Help".

5. **Script** field: browse to the location where you saved you SOC Project Files in the section “Create a Folder for SOC Epi Info Project Files” above this. Click to select the file schema_and_data.sql.

New Project from SQL Script

Script

Location

C:\SOC Epi Info Project\schema_and_data.sql

Browse

Data

Data Repository

Microsoft SQL Server Database

Browse

New Project

Name

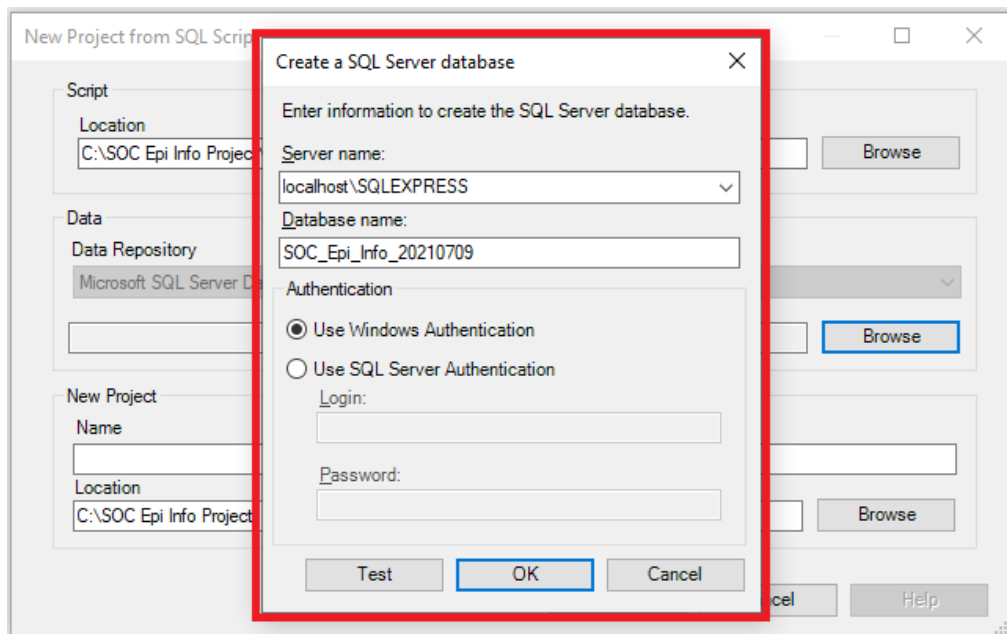
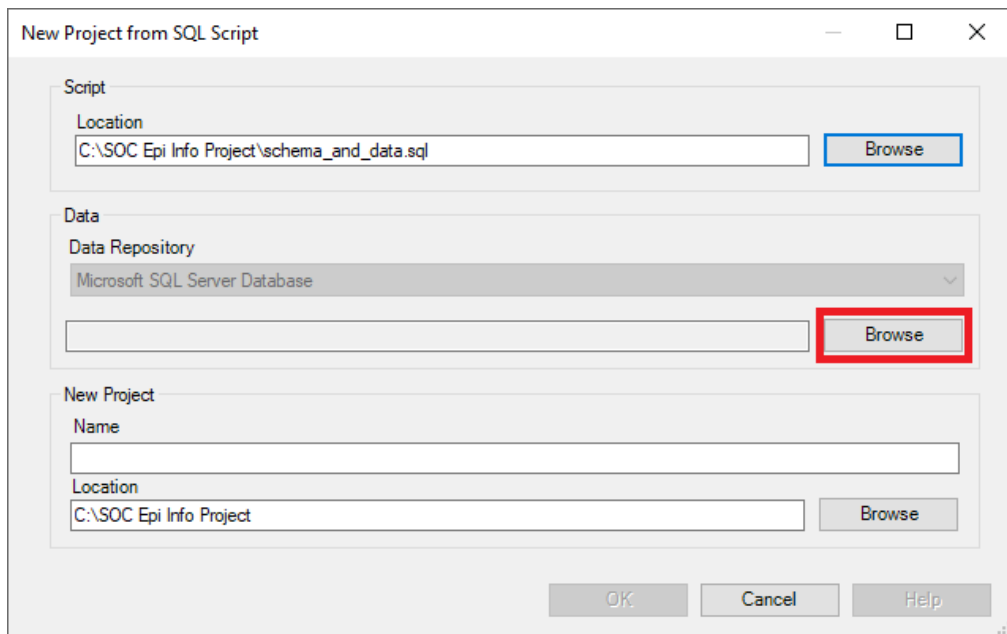
Location

C:\SOC Epi Info Project

Browse

OK Cancel Help

6. Data Repository Field: Click the “Browse” button. In the “Create a SQL Server database” pop-up, enter the following:
- Server Name: localhost\SQLEXPRESS
 - Database name: SOC_Epi_Info_YYYYMMDD (where YYYYMMDD is the current year, month, and day – see sample screenshot below)
 - Select “Use Windows Authentication”
 - Click the “Test” button to make sure you have a valid connection to the database.
 - Click OK, to close the pop-up.



7. Once back at the “New Project from SQL Script” pop-up, in the “New Project” section...
 - a. Name: **SOC_Epi_Info** (this is a suggestion – you can choose a different name but it can only contain letters, numbers or underscores)
 - b. Location: **c:\SOC Epi Info Project** (the folder you created in the steps above)
 - c. Note: this will create a *.prj file in this folder. Please remember this folder and file name – as it will be the one you use when starting to enter data (refer to user guide).

New Project from SQL Script

Script

Location

C:\SOC Epi Info Project\schema_and_data.sql

Browse

Data

Data Repository

Microsoft SQL Server Database

Data Source=localhost\SQLEXPRESS01;initial Catalog=SOC_Epi_Info_20210709;integrated Secu

Browse

New Project

Name

SOC_Epi_Info

Location

C:\SOC Epi Info Project

Browse

OK Cancel Help

8. Click “OK” again to close the pop-up. Epi Info will begin creating the project forms. This process should take between 5 and 15 seconds. Once it is complete, you should see the “BBH System of Care” page below.

Form Designer - [C:\SOC Epi Info Project\SOC_Epi_Info.prj]\WVSOCData\Page 1

File Edit View Insert Format Tools Help

New Project Open Project Close Project Undo Redo Check Code Enter Data

Project Explorer

- SOC_Epi_Info
 - WVSOCData
 - Page 1
 - GrantData
 - LocationData
 - StaffData
 - SatisfactionData
 - ESMHTierData
 - MHPETData
 - MCRSReferralData
 - FeedbackData
 - EventData
 - ClientData
 - MonthlyClientData
 - ServiceData
 - CATSDData
 - SatisfactionYouthData
 - SatisfactionCaregiverData
 - ProgramRelatedDataSource
 - SchoolDataSource
 - AgencyGranteeDataSource
 - Fields
 - Templates
 - Fields
 - Pages

WVSOCData\Page 1

BBH System of Care

Data Collection and Management System

User Guide

Welcome

Welcome to the Behavioral Bureau Health System of Care (BBH SOC) Data Collection and Management System. Within the Epi Info software, you will be able to add and edit records from forms within three areas: Client Records, Awarded Grants, and Agency Events.

The forms in this data collection cover 11 programs within the BBH SOC: (1) Children's Mental Health Wraparound (CMHW), (2) Children's Mobile Crisis Response and Stabilization (MCRS), (3) Children's Expanded School Mental Health (ESMH), (4) Positive Behavior Support (PBS), (5) First Episode Psychosis (FEP), (6) Six Regional Youth Services Centers (RYSC), (7) Respite, (8) Regional Youth Intervention Specialist (RYSIS), (9) System of Care Family Coordinator (SOCFC), (10) State Opioid Response Family Coordinator (SORFC), and (11) Drop in Center for Transitional Youth (DCYT).

Client Records

The Client form allows you to add and edit client's records and additional details needed for the System of Care's program(s) your agency covers for the clients. You will be able to:

- (1) Record the Monthly Information about the client,
- (2) Track Sessions of Services provided to the client, and
- (3) Collect the CANS Assessment on the client periodically.

Select "Go to Client Form" to begin.

Go to Client Form

Awarded Grants

The Grant form allows you to add and edit information on the grant(s) awarded to your agency and the locations covered by the grant(s). Additional forms allows you to:

- (1) Provide information on the staff,
- (2) Record monthly numbers of the consumer satisfaction, ESMH's tier transitions, and MCRS referrals, and
- (3) Collect the MHPET for ESMH's schools.

Select "Go to Grant Form" to begin.

Go to Grant Form

Agency Events

The Event form allows you to add and edit events across different programs.

This includes but not limited to: Trainings, Outreach Activities, Tier Prevention Activities, Cross-Planning Activities, Community Events, Assessments, and more.

Select "Go to Event Form" to begin.

Go to Event Form

Ready en-US 7.2.4.0 CAPS NUM INS...

9. Congratulations - you have successfully installed all of the required Epi Info components. Click the “X” at top right to close this window – and then refer to the User Guide for next steps on how to begin entering data.

Uninstalling Data Collection Forms

If you have previously installed a version of the Epi Info project forms, and need to install a new version, please follow the steps below to uninstall.

IMPORTANT: The steps below will remove any data that you have entered up to this point. If that was just test data, this is not a problem. If it was actual live data, and you have any questions, please contact technical support before continuing.

1. Find the folder where you previously created the Epi Info SOC Project.
 - a. In the example above, this is the folder C:\SOC Epi Info Project, but it may be in a different location, depending on how you previously set this up.
2. The file you are looking for has a *.prj extension.
 - a. In the example above this file was created as "SOC_Epi_Info.prj", but yours may differ.
3. Delete the *.prj file.
4. You can now go back to the "How to Download SOC Data Project Files" section above to install the new version of the forms.

Backup Considerations

Please note that if you have installed and are working with these software applications locally versus in a networked shared environment, the data you enter will only be present on that workstation. This means that if your workstation were to fail and become unrecoverable, you could lose your data.

Considerations for backup of data:

1. When you package your data for submission (refer to User Guide), the files you create contain all of the data in Epi Info. Consider storing these files or backing them up to an alternate location. It is very important to note that these files may contain sensitive information (PII/PHI), so this alternate location must be secure. Refer to your organization's IT support team for guidance.
2. When you submit your data to BBH via secure FTP, BBH will retain these submitted files for up to 6 months. These files can be used to rebuild your local database in case of a system failure.

Do not store Epi Info data on personally-owned computers. This data should only be stored on computers owned and maintained by your organization.

If you must share your data with someone else in your organization prior to submission to BBH, use the password protection option when creating the data package. You will need to share that password with the recipient so that they can then import the package into their Epi Info instance. Refer to the User Guide for detailed information on this functionality.