BALANCE OF CARE LITERATURE REVIEW: Data Extraction Form

Publication details

Author(s)	....
Institution	....
Title	....
	....
Publication type & name	....
Year / vol / pages	....

Other general information: ....

Review details

Date of data extraction	....
Name of data extractor	....
How publication identified	....
Unique reference number	....

Verification of inclusion criteria
Answer ALL questions

Empirical study or other application	**YES** / no	AND
Can contribute to planning decisions by simulating resource allocation options	**YES** / no	AND
Draws on data about the characteristics of people on the margins of care	**YES** / no	AND
Draws on data about service receipt	**YES** / no	AND
Provides information about the costs of care in different settings	**YES** / no	
Meets inclusion criteria	**YES** / no	
Explicitly identifies with the boc approach / DHSS boc model	**YES** / no	**YES** / no
Implicitly identifies with the boc approach in the references cited	**YES** / no	
Explicitly identifies with PBMA	**YES** / no	
Other planning model identified with	....	

Notes on inclusion / exclusion: ....
....

Key refs cited: ....

Study / paper aims / objectives

Main aim(s) / question(s)	....
	....
	....
	....
	....
Study purpose:	
inform local planning	**YES** / no ....
inform national planning	**YES** / no ....
demonstrate/develop/explore method	**YES** / no ....

Notes on aims: ....
....

Setting and population characteristics

Country & geographical location	....
Population(s) of interest	....
	....
Margin(s) of care explored i.e. alternative care settings	....
	....
Number of subjects about whom data collected	....
Year(s) data collected	....

Notes on setting and population: ....
....

Service user data collection

Domains: Complete set / examples only / not reported

Used in modelling/analysis: ....
....
....
....
....
....
....

NOT used in modelling/analysis..
....
....
....
....

State any validated measures ....

Principal source (e.g. case notes, interviews) ....

Notes on service user data collection: ....
....

Service receipt data collection
Record at an aggregate level e.g NHS hospital / Social services community / voluntary sector / informal care

Service type: Complete set / examples only / not reported	**Principal source:**
....	....
....	....
....	....
....	....
....	....
....	....

Notes on service receipt data collection: ....
....

Specification of unit costs
At aggregate level, as per above; include informal care costs

Cost type: Complete set / examples only / not reported	Principal source:
....	....
....	....
....	....
....	....
....	....
....	....
Year costs relate to	....
Main type of costs used	Average / marginal / mix

Notes on cost data collection: ....
....

Evidence on outcomes

Was any evidence on final outcomes collected?	yes / no
If yes, what outcomes?	....
If no, was any related research on outcomes used in the analyses?	yes / no / NA
If yes, what outcomes?	....
	....

Notes on outcome data collection (including outcomes perceived to be useful, but not measured : ....
....
....

Data analysis

Unit of analysis	....
Means of identifying marginal cases	....
	....
	....
Means of identifying alternative care	....
	....
	....
Stated assumptions	....
	....
Presence of sensitivity analysis & variables involved	....
	....
Use of computer/mathematical/statistical modelling in the boc simulation exercise?	....

Notes on data analysis: ....
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Contextual factors said to have helped / hindered the study's implementation

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Stated limitations of the study

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Main conclusions

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General notes on paper and/or study quality

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