

Upload Roster Data

Date: 30th January 2017

Version: 1.0

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1. Overview

The purpose of this document is to provide details of how to use the upload roster data functionality from within the brokerage tool.

Care Providers (from this point forward referred to as providers) are required to interface with CareForIT EBrokerage to supply quality information to commissioners about the delivery of care packages.

This document details how providers are able upload data to the CareForIT EBrokerage Platform.

Our standard interface uses CSV files to transfer data between providers and CareForIT EBrokerage.

This document provides a guide which will ensure the interface is as seamless as possible.

1.1. Getting Started

The provider needs to be set up with the Access Privilege Supplier Admin. This can be requested from Webformed via the technical support desk calling 01626 798890, or by emailing support@care-for-it.com

1.2. Data Import

A data import file must contain data for one specific provider only.

To import files here are some basic guidelines to help get you started:

1.2.1. Import Files

CareForIT expects a minimum of 3 import files per provider:

- Planned Visit Data
- Actual Visit Data
- Client Information File

In addition, systems are also able to send information about planned visits which have been deleted. Data files can be uploaded at any time. However please ensure data is sent at least once per day.

1.2.2. Package Identifier

Each package of care awarded within CareForIT EBrokerage will be given a unique package identifier. This package identifier will be used to segregate data for payments, invoicing, and reporting.

1.2.3. Client Identifier

Each package of care awarded within CareForIT EBrokerage is associated with a Client Identifier. This enables commissioners to link packages of care back to a specific client.

1.2.4. Visit Identifier

Each visit reported to CareForIT EBrokerage by a system, must be given a unique identifier. This unique identifier must be provided by the system and must be common between the planned visit data and the actual visit data.

2. File Conventions

2.1.1. Filename Convention

Filenames should always start C4IT

Concatenate a reference which can be used to identify the provider in both CareForIT EBrokerage and the system.

Concatenate a string to make the filename unique i.e. a counter or timestamp.
Concatenate the suffix .txt

Below is an example of a sensible filename convention:
C4ITacmecare1464791424.txt

- C4IT identifies this as a file for use by CareForIT EBrokerage
- The provider is Acme Care
- This file was generated on 01/06/2016 @ 14:30:24 (UTC)

* When using timestamps, please ensure the precision is high enough to prevent files being named with duplicate names.

2.1.2. Line Termination

Lines must be terminated with a Carriage Return (CR – ASCII Code 13) followed by a Line Feed (LF – ASCII Code 10).

Fields within a line should not contain any CR or LF characters.

2.1.3. Dates

All dates are to be formatted as dd/mm/yyyy i.e. 01/06/2016

2.1.4. Blanks & NULL

The CSV file import allows a system to create an entry, update an entry or explicitly clear out the data stored by CareForIT EBrokerage. The following rules apply:

- **Ignore** - Supplying nothing between commas will not make any changes to a field
- **Blank** – By supplying the literal [NULL] any data currently stored for the field will be removed.
- A mandatory field cannot be blanked out, dates and strings will be set to null.
- Booleans and Integer fields cannot be blanked out

2.1.5. Commas

Before sending any records ensure commas are escaped.

2.2. File Format

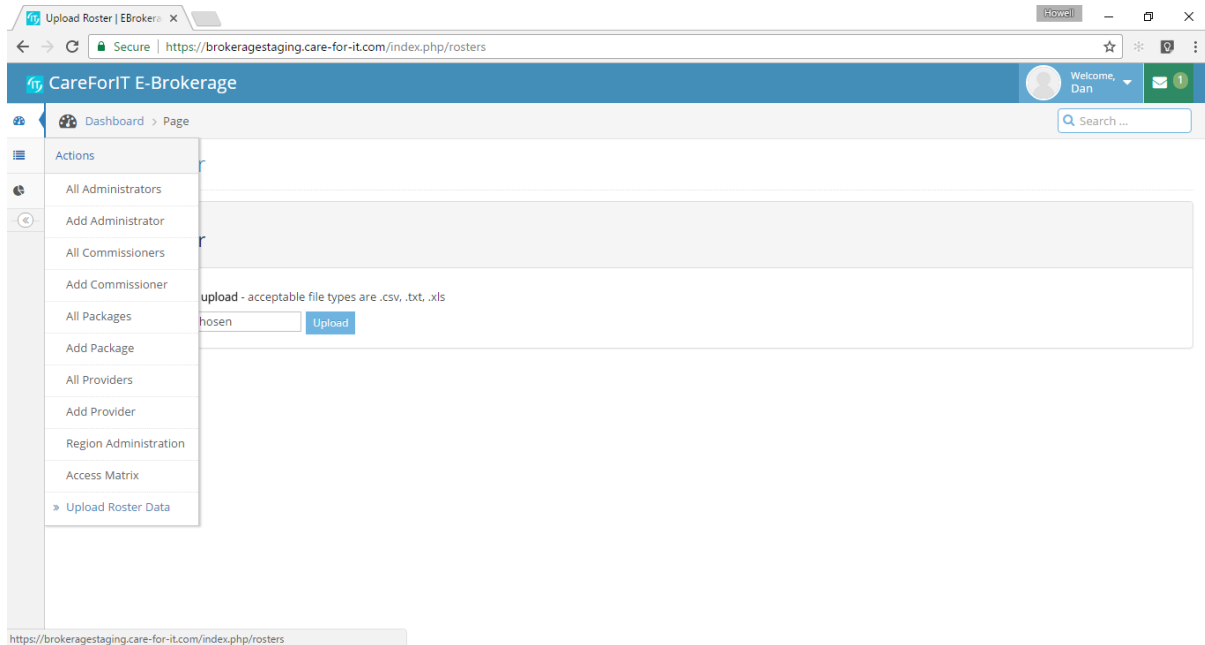
A detailed description of how the files are to be formatted is set out in the interface specification

- CareForIT_EBrokerage_Interface_Specification.pdf

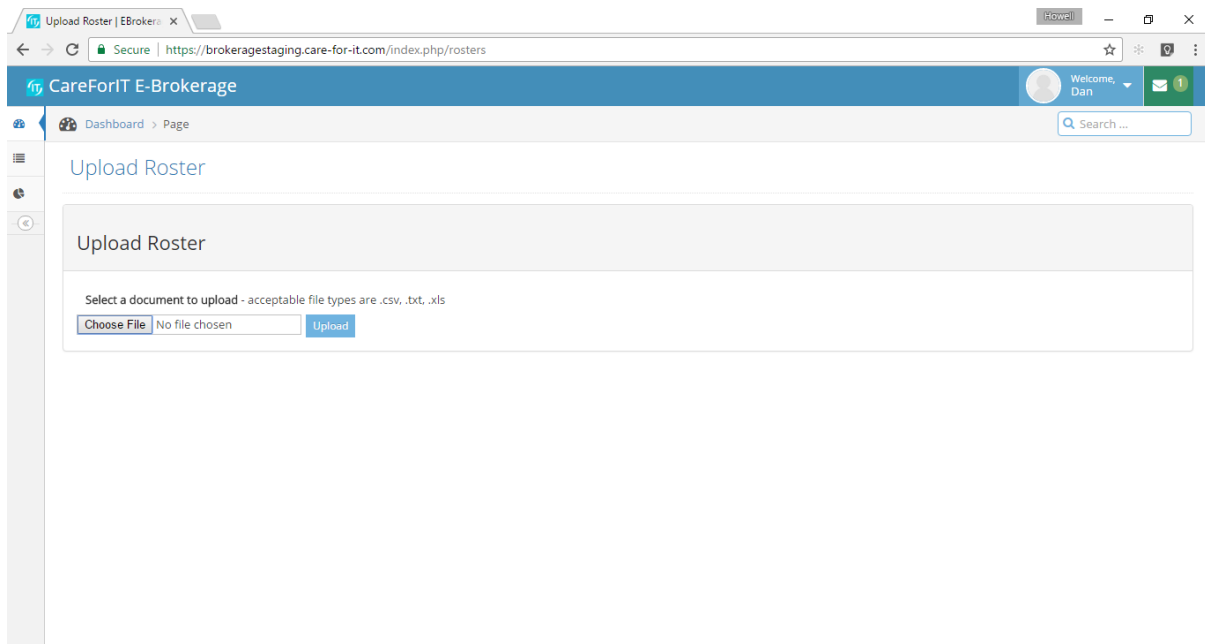
2.3. How to

Login into E-Brokerage as a Provider Admin

Actions > Upload Roster Data

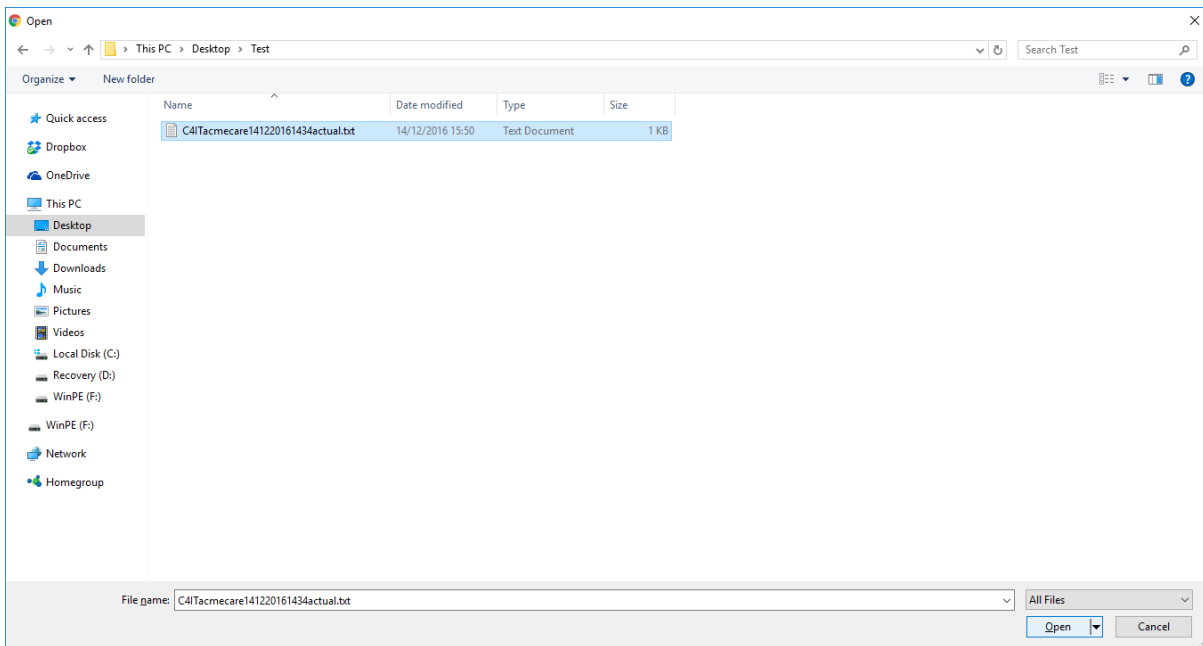


Click on Choose File



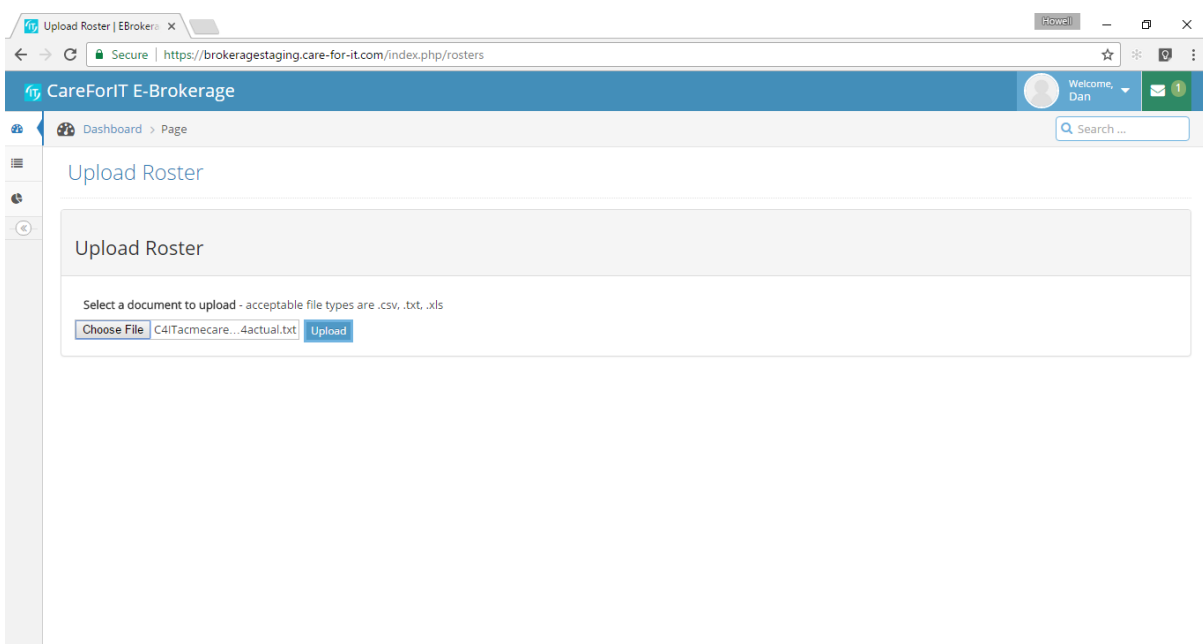
This will open a file explorer screen

Click on the file intended for upload (ensuring that it meets are required pre-requisites).

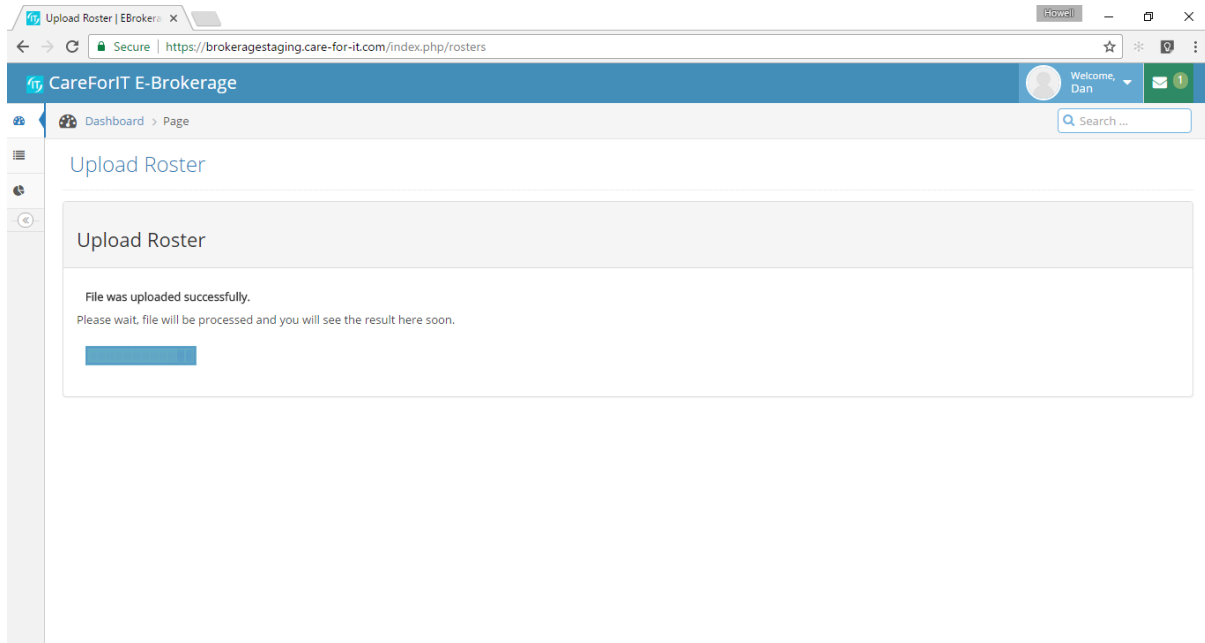


Click Open

Click Upload

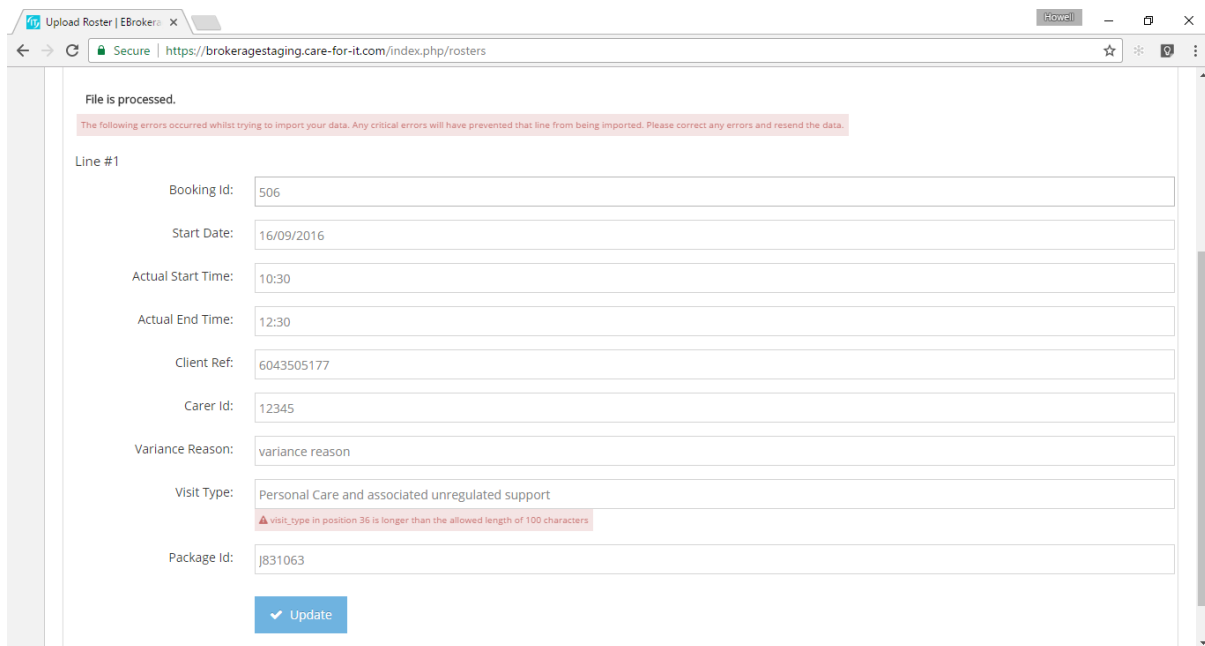


You will get a message saying File was uploaded successfully



File is processed message appears.

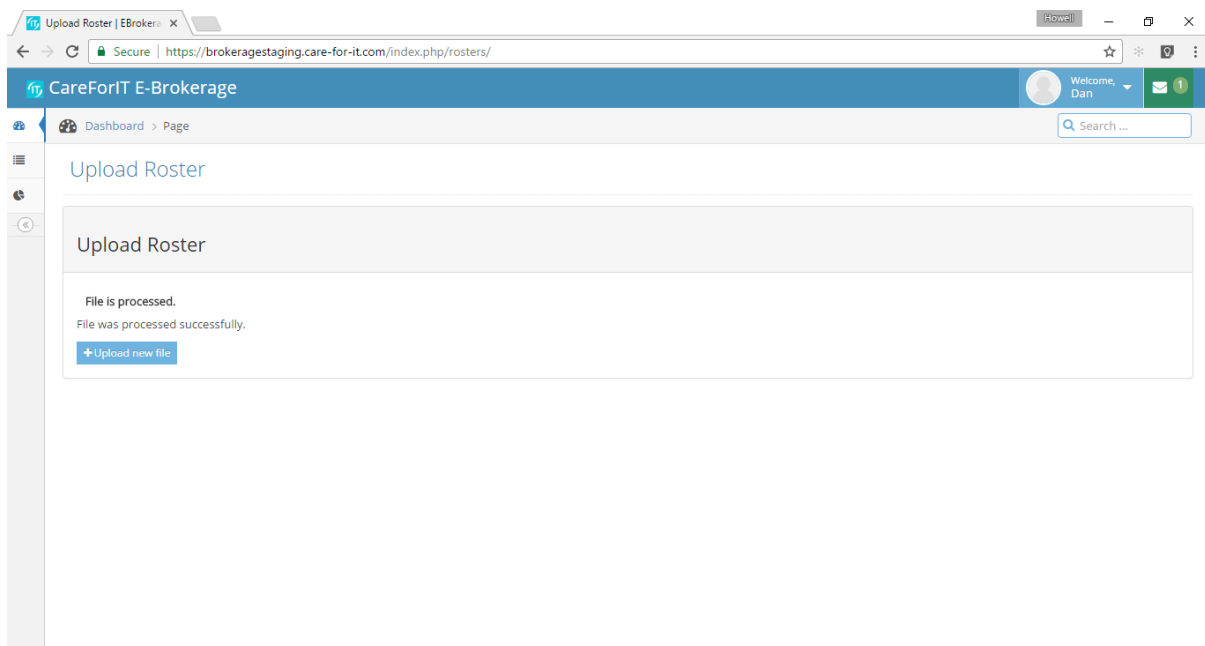
If there are errors in the file you will be presented with a screen



Each line containing an error will be presented on screen
Items marked in red can be update on screen and updated via the click update button.

Click Update

File reprocesses and imports



2.4. Contact

For further information or clarification of any of the information provided in minutes please contact

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