

# Upload Roster Data





# Content

Content	2
1. Overview	3
1.1. Getting Started	3
1.2. Data Import	3
1.2.1. Import Files	3
1.2.2. Package Identifier	4
1.2.3. Client Identifier	4
1.2.4. Visit Identifier	4
2. File Conventions	4
2.1.1. Filename Convention	4
2.1.2. Line Termination	4
2.1.3. Dates	5
2.1.4. Blanks & NULL	5
2.1.5. Commas	5
2.2. File Format	5
2.3. How to	6
2.4. Contact	9



# 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

	Upload Roster   EBrokera 🗙 🖉		Howell _ D	×
$\leftarrow$	> C Secure   https	://brokeragestaging.care-for-it.com/index.php/rosters	☆ *	Q. :
ſŢ	CareForIT E-Broke	erage	Dan Welcome, 👻 🖂	2 1
<b>B</b>	Dashboard > Page		Q Search	
	Actions	r		
¢	All Administrators			
	Add Administrator			
	All Commissioners	r		
	Add Commissioner	upload - acceptable file types are .csv, .txt, .xls		
	All Packages	hosen Upload		
	Add Package			
	All Providers			
	Add Provider			
	Region Administration			
	Access Matrix			
	» Upload Roster Data			
https://	brokeragestaging.care-for-it.con	n/index.php/rosters		

# Click on Choose File

	🕼 Upload Roster   EBrokera X						
< -	← → C						
G	CareForIT E-Brokerage	🖉 🦉 Welcome, 🚽 🖬 🗊					
<u>6</u>	Bashboard > Page	Q Search					
≡ ¢	Upload Roster						
	Upload Roster						
	Select a document to upload - acceptable file types are .csv, .txt, .xls         Choose File       No file chosen         Upload						



This will open a file explorer screen

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

🕽 Open					
$\leftarrow$ $\rightarrow$ $\checkmark$ $\uparrow$ $\square$ $\Rightarrow$ Thi	is PC > Desktop > Test				
Organize 👻 New folde	er				
	Name	Date modified	Туре	Size	
📌 Quick access	C4lTacmecare141220161434actual.txt	14/12/2016 15:50	Text Document	1 KE	КВ
🐉 Dropbox					
le OneDrive					
💻 This PC					
📃 Desktop					
Documents					
Downloads					
Music					
📰 Pictures 📳 Videos					
Local Disk (C:)					
Recovery (D:)					
WinPE (F:)					
winPE (F:)					
💣 Network					
•4 Homegroup					
File <u>n</u> a	ame: C4ITacmecare141220161434actual.txt				_

# Click Open

# Click Upload

	Upload Roster   EBrokera X	Howell - D X
~	C Secure   https://brokeragestaging.care-for-it.com/index.php/rosters	☆ 🛞 🕄
<b>G</b>	CareForIT E-Brokerage	Welcome, 🚽 💶 🚺
6	Bashboard > Page     Construct → Page	Q Search
=	Upload Roster	
•		
- (()	Upload Roster	
	Select a document to upload - acceptable file types are .csv, .txt, .xls Choose File C4ITacmecare4actual.txt Upload	



# You will get a message saying File was uploaded successfully

C Upload Roster   EBrokera X				
$\leftarrow$	C Secure   https://brokeragestaging.care-for-it.com/index.php/rosters	☆		
6	CareForIT E-Brokerage	Welcome, 🚽 Dan	⊠ 1	
<u>8</u>	Bashboard > Page	Q Search		
•	Upload Roster			
	Upload Roster			
	File was uploaded successfully. Please wait, file will be processed and you will see the result here soon.			

File is processed message appears.

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

Upload Roster	EBrokera ×		Howell	-	٥	>	(
← → G 📑	Secure   https://brokera	gestaging.care-for-it.com/index.php/rosters		☆	* (	9	:
File is	processed.						*
The follo	owing errors occurred whilst try	ing to import your data. Any critical errors will have prevented that line from being imported. Please correct any errors and resend the data.					
Line #	1						
	Booking Id:	506					
	Start Date:	16/09/2016					l
	Actual Start Time:	10:30					I
	Actual End Time:	12:30					I
	Client Ref:	6043505177					I
	Carer Id:	12345					I
	Variance Reason:	variance reason					I
	Visit Type:	Personal Care and associated unregulated support					I
		▲ visit_type in position 36 is longer than the allowed length of 100 characters					I
	Package Id:	J831063					I
		✓ Update					Ţ



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

	Upload Roster   EBrokere X	Kowal – Ø ×
←	C Secure   https://brokeragestaging.care-for-it.com/index.php/rosters/	☆ * 🛛 :
ſŢ	CareForIT E-Brokerage	Dan 💌 🖬 🛈
en (	B Dashboard > Page	Q Search
≡ ¢	Upload Roster	
	Upload Roster	
	File is processed. File was processed successfully. +Upload new file	

#### 2.4. Contact

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

Name:	Howell Hughes
Phone Desk:	01626 798 212
Mobile:	07437017224
Email:	howell@webformed.co.uk