

# CareForIT

## EBrokerage Interface Specification

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# CareForIT EBrokerage Interface Specification

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## 1. **Overview**

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 call monitoring and/or scheduling software system providers (from this point referred to as systems) are able to interface with the CareForIT EBrokerage Platform.

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

Files are transferred using the FTP protocol.

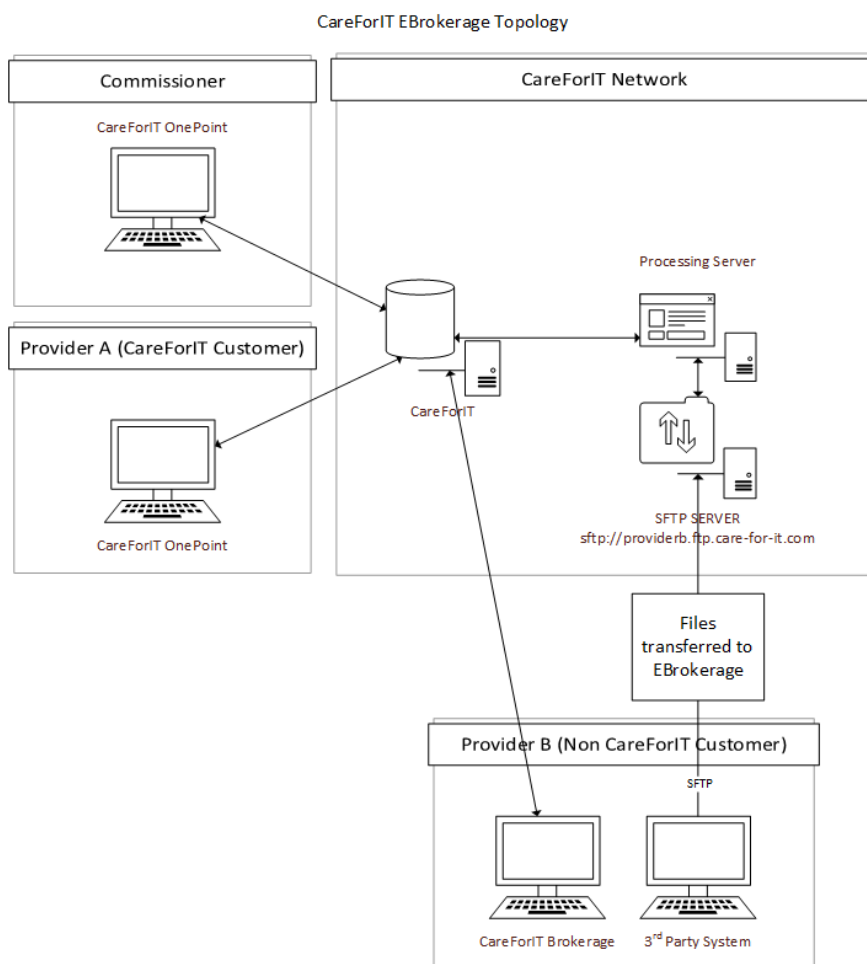
This document provides a guide which will ensure the interface is as seamless as possible.

## 2. Getting Started

### 2.1. Topology

The integration between systems and CareForIT EBrokerage is designed to be simple, enabling systems to interface quickly.

Below is the topology of how CareForIT EBrokerage connects to systems:



### 2.2. FTP Credentials

To integrate with CareForIT EBrokerage an Inbound FTP account will be setup for each provider. Please contact [operations@webformed.co.uk](mailto:operations@webformed.co.uk) for credentials.

### 2.3. Approach

During the initial interface it is important that both Webformed and systems work closely together to ensure providers receive the best possible experience.

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Due to the nature of system interfaces there will always be potential points of failure which should be considered. (For example, if a network is down/connections drop in mid process).

Support is available to assist with the configuration of interfaces. Please contact [technical@webformed.co.uk](mailto:technical@webformed.co.uk)

### **3. 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:

#### **3.1. 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.

#### **3.2. 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.

#### **3.3. 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.

#### **3.4. 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.

### 3.5. File Conventions

#### 3.5.1. 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.

#### 3.5.2. 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.

#### 3.5.3. Dates

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

#### 3.5.4. 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

### **3.5.5. Commas**

Before sending any records ensure commas are escaped.



#### **4. Import Files Syntax**

CareForIT Ebrokerage will only process data in the columns specified in the following tables.

Sending data in other positions will not cause the import to fail, however, the information in other positions will be ignored.

#### 4.1. Planned Visit File

This is the information required by CareForIT EBrokerage to create a planned visit.

A planned visit must be linked to a package identifier and a client identifier.

Position	Field	Format	Mandatory	Comments
1	type	"3"	Yes	Identifies that this file is planned visit data
2	booking_id	Up to 45 char string	Yes	A unique ID which correlates to a unique key in the host system.  This must be referenced in the actual data file.
3	start_date	"dd/mm/yyyy"	Yes	The date the planned visit starts on.
4	start_time	"hh:mm"	Yes	The start time of the planned visit
5	end_time	"hh:mm"	Yes	The end time of the planned visit.  A planned visit cannot be longer than 24 hours.
7	client_ref	Up to 45 char string	Yes	The unique client identifier from the host system.  This must be referenced in the client data file.
13	carer_id	Up to 30 char string	No	A unique ID which correlates to a unique key in the host system.  This can be referenced in the carer data file.
36	visit_type	Up to 100 char string	No	The type of visit. (eg. "Sleeping Night")
42	package_id	Up to 50 char string	Yes, for all visits associated with CareForIT EBrokerage.	The Package Identifier from CareForIT EBrokerage.

## 4.2. Actual Visit File

This information will report to CareForIT EBrokerage the actual times reported by the system for the planned visits.

The actual visit file can also include unplanned visits. If a booking\_id of 0 is provided or the field is empty, this will be treated as an unplanned visit.

Actual visit data should only be sent once the visit has been completed.

Position	Field	Format	Mandatory	Comments
1	type	"5"	Yes	Identifies that this file is actual visit data
2	booking_id	Up to 45 char string  0 or leave empty if this is an unplanned visit	Yes	A unique ID which correlates to a unique key in the host system.
3	start_date	"dd/mm/yyyy"	Yes	The date the actual visit started on.
4	actual_start_time	"hh:mm"	Yes	The time the visit started at.
5	actual_end_time	"hh:mm"	Yes	The time the visit ended at.
7	client_ref	Up to 45 char string	Yes	The unique client identifier from the host system.  This must be referenced in the client data file.
13	carer_id	Up to 30 char string	No	A unique ID which correlates to a unique key in the host system.
35	variance_reason	Up to 45 char string	No	The reason for any variance in the planned visit.
36	visit_type	Up to 100 char string	No	The type of visit. (eg. "Sleeping Night")
42	package_id	Up to 50 char string	Yes, for all visits associated with CareForIT EBrokerage.	The Package Identifier from CareForIT EBrokerage.

### 4.3. Delete Planned Visit File

A deletion can be sent for a planned visit.

The deletion must reference the booking\_id notified to CareForIT EBrokerage by the system.

A deletion will only be actioned if no actual visit data has been provided.

If a booking\_id cannot be located within CareForIT EBrokerage the deletion will not be actioned

Position	Field	Format	Mandatory	Comments
1	type	"4"	Yes	Identifies that this file is to delete planned visit data
2	booking_id	Up to 45 char string	Yes	A unique ID which correlates to a unique key in the system.

#### **4.4. Client Information File**

The client information must contain the client identifier from CareForIT EBrokerage as well as a unique key in the host system that references the ID given in the planned and actual visit files.

This file can be sent before or after a visit file but this data is mandatory for the interface to function correctly.

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Position	Field	Format	Mandatory	Comments
1	type	"7"	Yes	Identifies that this file is client information.
7	client_ref	Up to 45 characters	Yes	The unique client identifier from the host system.  This must be referenced in the planned and actual data files.
9	telephone	Up to 20 char string	Yes	The client's contact number.
10	title	"Mr", "Mrs", "Miss" or "Ms"	Yes	The client's title.
11	forename	Up to 50 char string	Yes	First name of the client.
12	surname	Up to 100 char string	Yes	Surname of the client.
21	gender	"male" or "female"	Yes	The client's gender.
22	address_1	Up to 255 char string	Yes	Allows complete address data.
23	address_2	Up to 255 char string	No	
25	town	Up to 255 char string	No	
26	county	Up to 30 char string	Yes	
27	postcode	Up to 8 char string	Yes	
29	cf_id	Up to 45 char string	Yes	The client identifier from CareForIT EBrokerage.
30	start_date	"dd/mm/yyyy"	Yes	The date the client's service started.
38	dob	"dd/mm/yyyy"	Yes	Th client's date of birth.

#### 4.5. Carer Information File

The carer information is not mandatory for the CareForIT EBrokerage interface however if you wish to supply us this information it must be in the below format.

This information can be added to the system at any time and does not need to precede any other data.

Position	Field	Format	Mandatory	Comments
1	type	"11"	Yes	Identifies that this file is carer information.
13	carer_id	Up to 30 char string	Yes	A unique ID which correlates to a unique key in the host system.  This is referenced in the planned and actual data files.
17	title	"Mr", "Mrs", "Miss" or "Ms"	Yes	The carer's title.
18	forename	Up to 50 char string	Yes	First name of the carer.
19	surname	Up to 100 char string	Yes	Surname of the carer.
22	address_1	Up to 255 char string	No	Allows complete address data.  Fields can be left blank as appropriate.
23	address_2	Up to 255 char string	No	
25	town	Up to 255 char string	No	
26	county	Up to 30 char string	No	
27	postcode	Up to 8 char string	No	
30	start_date	"dd/mm/yyyy"	No	The date the carer started their employment.
33	ni_number	Up to 9 char string	No	The carer's national insurance number

## Version Control

### 1.1 Revisions

- Added the specification for importing client and carer information (client information is mandatory; carer information is optional).

#### Planned visit file changes

- Position 7 now relates to the unique client identifier within the host system instead of the carefirst ID from CareForIT EBrokerage.
- Position 13 now holds an optional carer reference field.
- Clarified the need for a package ID on all visits that relate to CareForIT EBrokerage.
- Position 36 now holds an optional visit type field.

#### Actual visit file changes

- The actual visit file now follows the same structure as the planned visit file.
- Carefirst ID has been removed and replaced with the unique client identifier from the host system which resides in position 7.
- Position 13 now holds an optional carer reference field.
- Variance reason now resides in position 35.
- Package ID now resides in position 42.
- Position 36 now holds an optional visit type field.