TriYoung Inc.

Transforming Data into Information

2024

Data Integration System (DIS) Manual

Table of Contents

When making changes to process documentation and manuals, update the table of contents after you make changes; it does not do so automatically. Also, add your initials, a brief description of changes, and a date to the change log below.

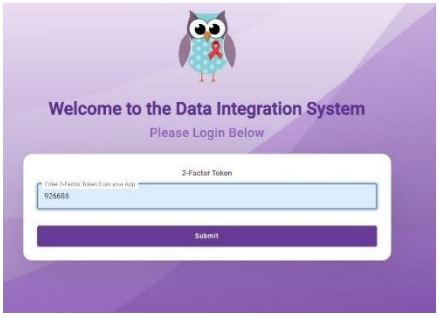
Author	Change Log	Date
DC	Document Created	9/23/2024
MP	Mike Reviewed	10/08/2024
PP/LA	Final Review of First Draft, updated recommended.	10/11/2024
DC	Updated Troubleshooting section – Incorrect file Structure	10/23/2024
DC	Updated Troubleshooting section – Client ID Is required	12/3/2024
DC	Updated Troubleshooting section – File Mapping Race/Risk	12/6/2024
DC	Updated File Mapping – Added disclaimer Step 5A	2/4/2025
DC	Updated Troubleshoot steps – Duplicate Client Step 4A	2/21/2025

Overview

The Data Integration System (DIS) Manual outlines key processes for users who interact with the Data Integration System, primarily focused on data imports into CAREWare. The manual is structured to guide new users through logging into the system, navigating the home page, managing file uploads, and reviewing import history. It also details handling errors, processing imports, and understanding the file summary, including troubleshooting data issues. This documentation is meant to be clear and accessible to users unfamiliar with the system, ensuring they can follow instructions without needing prior technical knowledge or experience with data imports.

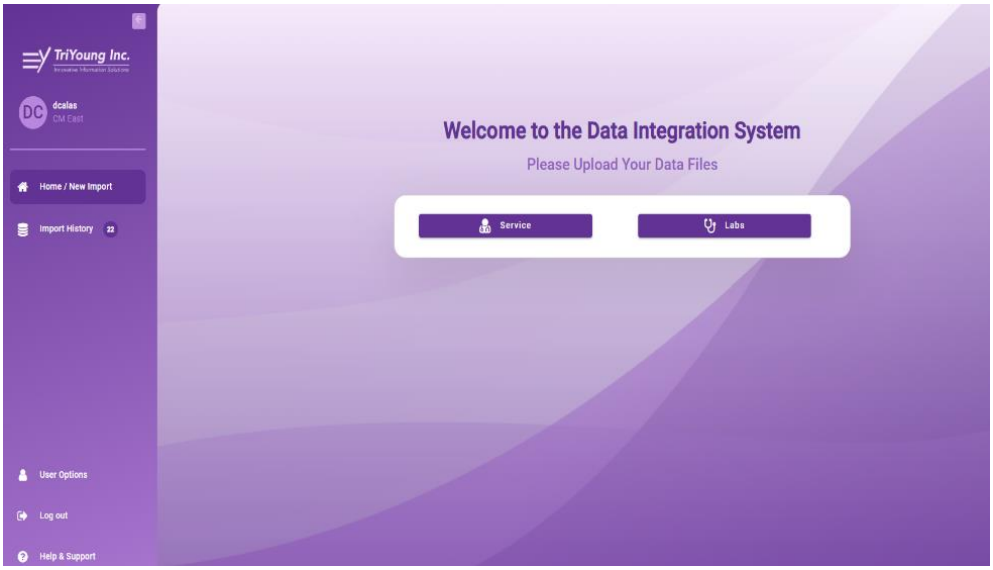
Logging in

Enter your **CAREWare** Credentials followed by your 2-factor authentication code. If the data entered is incorrect, users will get an error.



If the users valid DIS permissions in two or more domains they will be prompted to select a domain.

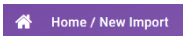
Home Page

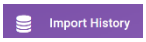


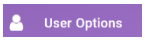
This is the **DIS Home Page**. From this page, users can navigate through the DIS application and access various features and functionality.

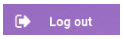
Users can select any of the buttons they see on this screen. See additional descriptions below.

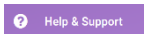
Note: Depending on the provider, users may see multiple upload buttons on the Home Page, one for each of their imports.

Home/New Import: The system navigates to the Home Screen. 

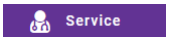
Import History: Historical records of imports for the logged in provider. If you see a number encircled next to import history, this indicates number of "ready to Process" imports. 

User Options: Allows users to change their password. 

Logout: Logs users out of the system. 

Help & Support: Redirects users to TriYoung's Support request form. 

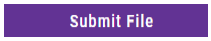
Menu Size: This collapses the menu on the left-hand side of the screen. 

Upload Button: Uploads your import file into DIS, it's named based on your import. 

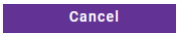
File Summary

The file summary page provides the user with a summary of the uploaded data, including the File Name, **Date Range**, **Record Count**, **Ready to Import,** and **Ignored Records**.

This page will also show the number of error types, while the other lines show the specific number of errors for the related error This will assist users in troubleshooting data issues.

Submit File: Submits the file into CAREWare and places it in a ready to process status. 

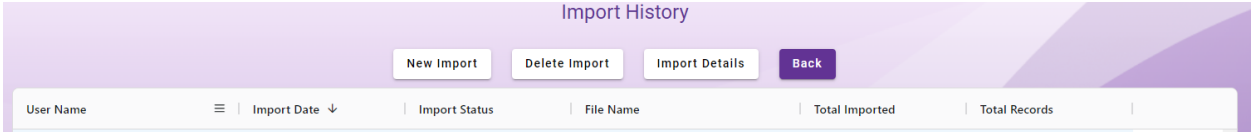
Ignore Values: This will exclude the checked data from being imported. 

Cancel: Cancels the current process and redirects you to the Home Screen 

Date Range: The start and end dates of the files uploaded.
Record Count: Total number of records uploaded.
Ready to import: Total number of records that can be imported.
Ignored Records: Total number of records excluded from the import.
Errors: This displays the total number of data errors in the file. Users may select the underlined number next to the error to get additional details about that error.

Import History

This provides a list of imports uploaded historically by users. It includes the **User Name**, **Import Date**, **Import Status**, **File Name**, **Total Imported**, and **Total Records.**



New Import: Redirects the user to the DIS Home Page.
Delete Import: Deletes the selected import from the Import History Page.

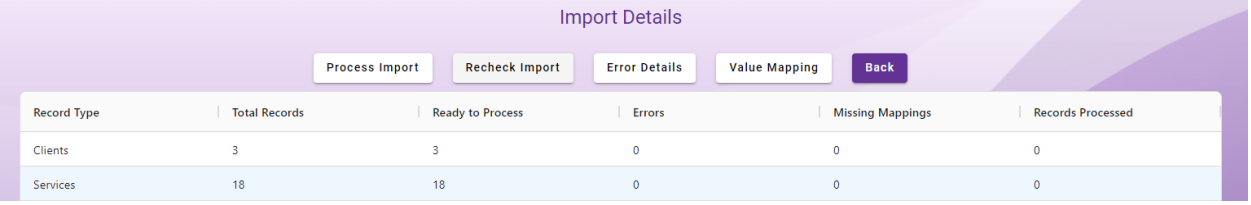
Note: This DOES NOT delete records that have been imported/processed from the database; only the historical record of the import is deleted. This should not be used after an Import has been completed.

Users would make this selection if they had modified and uploaded a new file, and then they would delete the import that was not completed from import history.

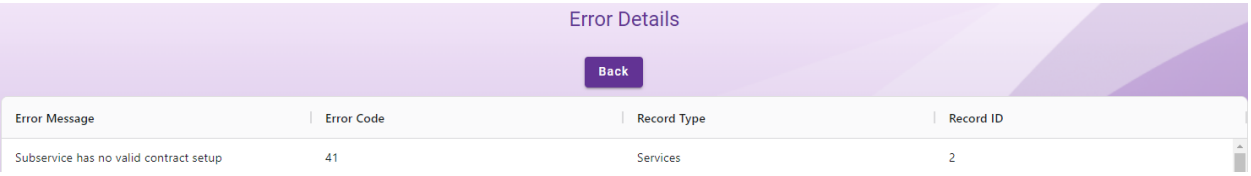
Import Details: Redirects the user to the Import Details Page.
Back: Redirects the user to the DIS Home Page.

Import Details

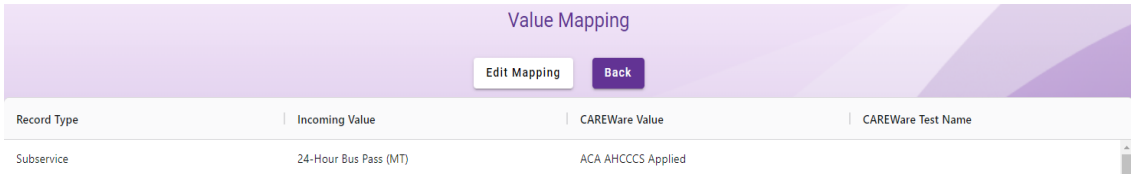
Provides a summary of what will be imported into CAREWare. This includes the **Record Type, Total Records, Ready to Process, Errors, Missing Mappings** and **Records Processed**.



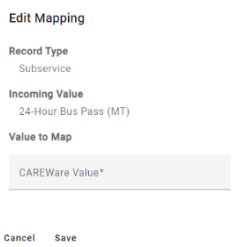
Process Import: Begins processing the import into CAREWare**.**
Recheck Import: Redirects the user back to the Import History page, while re-processing the data uploaded. **NOTE: Nothing is imported into CAREWare.**
Error Details: Provides Specific detail of the errors sent back from CAREWare.



Value Mapping: When you map an incoming value (from the uploaded file) to a CAREWare value, CAREWare will treat that incoming value as if it were the CAREWare value you selected. Essentially, the system will interpret the incoming value in the same way it handles the CAREWare value you mapped it to.



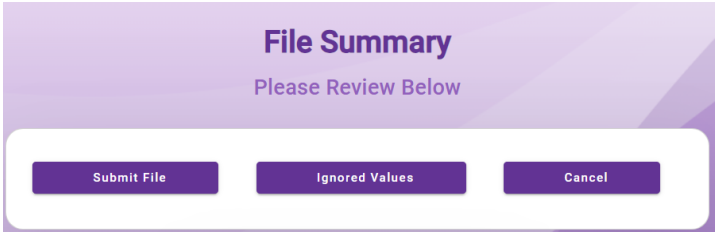
In other words, once you map an incoming value to a CAREWare value, any instances of that incoming value will be processed as the mapped CAREWare value.



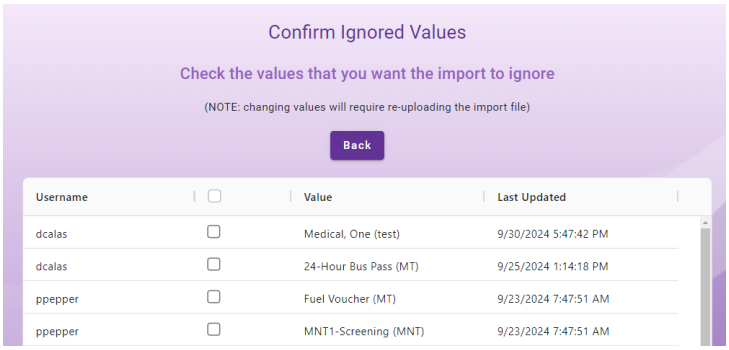
Back: Redirects the user back to the Import History page

Ignored Values

From the file summary page, users can select ignored values. This will navigate users to the **Confirm Ignored Values** page.

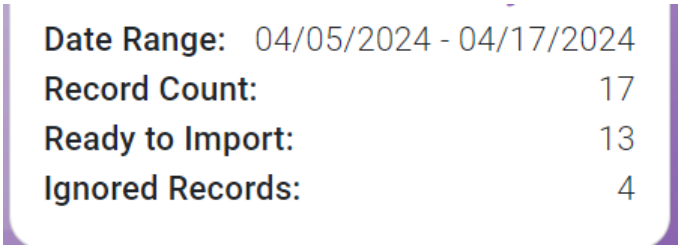


From here users may select any value, multiple values, or none at all. If they select no values at all and hit **Back** they are taken back to the **File Summary** screen.



If users select one or more values to ignore, the username will change to indicate that it has been adjusted and the import will need to be reprocessed. The users hits **Back** and the system navigates back to the **Home Page**.

The users will re-upload the same file to be processed with newly selected or deselected **Ignored Values**. If the ignored values selected exist on the file being uploaded, the File Summary screen displays the number of ignored records.

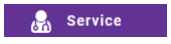


If user's file contains no ignored records, they will not see I**gnored Records**.

Processing an Import

1. Uploading the file

- From the DIS Home Page, click the **Upload File** button.
  - This may be called Service or whatever type of import you're doing:



- A new window will open.
- Choose the file you want to import and click **Open**.
- You will be redirected to the **File Summary** page.
- Review the summary of the uploaded file.

2. Submit the File

- Click the **Submit File** button.
- This action will take you to the **Import History** page.
- Check File Status
- Wait for the uploaded file to show a status of **Ready to Process**.

3. Import Details

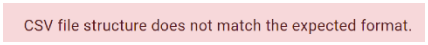
- Click on the file name.
- Then, click the **Import Details** button to view the file breakdown and any errors.
- If there are errors, correct them as necessary.

4. Process the Import

- Once errors are cleared, and/or you've accepted the errors will be skip (data not imported), click the **Process Import** button.
- You will be redirected back to the **Import History** page.
- Wait for the Import Status to change to **Processed**, this indicates that the file has been successfully imported into CAREWare.

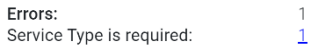
Troubleshooting Data Issues

1. **Incorrect file structure:**
    a. Columns that do not fit the initial file structure will error out and provide the user with the following error message: **CSV file structure does not match the expected format.**



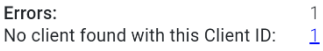
        i. This includes blank columns with data in one of those columns cells, brand new added columns or missing columns.
    b. To resolve this, open the CSV file and ensure no columns have been added, modified or removed from the original file structure that was agreed upon. Columns need to match 1 to 1.

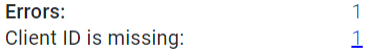
2. **Service Type is required:**
    a. If there are Services missing on the file, the system will notify the user with the following error message: **Service Type is required** accompanied by an underlined number with the amount of those errors.



    b. To resolve this, open the CSV file and ensure all services are populated on the file.

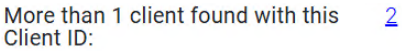
3. **Client ID is required:**
    a. If there are Client ID's missing on the file Or the Client ID does not exist in CAREWare, the system will notify the user with the following error message: **No client found with this Client ID Or Client ID is missing**, accompanied by an underlined number with the amount of those errors



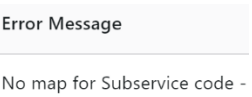


b. To resolve this, open the CSV file and ensure all Client IDs are populated on the file. Client ID is a **REQUIREMENT** to import the data.

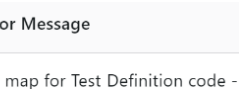
4. **More than 1 client found with this Client ID:**
   a. This means there is a client with the same Client ID already in CAREWare. This is a **duplicate client** situation and needs to be reviewed and corrected by the Case Manager.



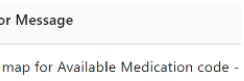
5. **File Mapping:**
   a. When using the DIS for the first time, you will need to manual map services, labs, etc. This will only happen once, if it does appear again in the future, it's due to a new service/record name that was not manually matched before.
   b. Common Mapping issues:
      i. If a Service name does not match the name that is in CAREWARE 100% the system will display the following error message on the Error Details page: **No Map for Subservice code –** followed by the service name in question if it's a service.



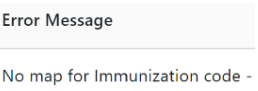
      ii. If a Lab name does not match the name that is in CAREWARE 100% the system will display the following error message on the Error Details page: **No Map for Test Definition code –** followed by the Lab name in question.



      iii. If a Medication name does not match the name that is in CAREWARE 100% the system will display the following error message on the Error Details page: "**No Map for Medication Code –** "followed by the Medication name in question if it's a service.



      iv. If an Immunization name does not match the name that is in CAREWARE 100% the system will display the following error message on the Error Details page: "**No Map for Immunization Code –** "followed by the Immunization name in question if it's a service.



      v. If a Race subgroup does not match the subgroup that is in CAREWARE 100% the system will display the following error message on the Error Details page: "**No Map for Race subgroup Code –** "followed by the Race subgroup name in question if it's a service.
      vi. If a Risk Factor does not match the subgroup that is in CAREWARE 100% the system will display the following error message on the Error Details page: "**No Map for Risk Factor Code –** "followed by the Risk Factor name in question if it's a service.

c. **To resolve these issues**: (*With the exception of race subgroup and Risk factors*)
    i. On the import details page click on the Record type with the error
    ii. Click the "**Value Mapping**" button.
    iii. Click on the record type indicated on the error details page as the issue
    iv. Click the "**Edit Mapping**" button
    v. Click the text field under "**Value to Map**"
    vi. Enter test or scroll down until the correct CAREWare name of the record is located
    vii. Click on the record
    viii. Click Save
    ix. Click the "**Recheck Import**" button.

d. **For Race subgroups and Risk factors Follow the below instructions**:
    i. On the import details page click on the Record type with the error
    ii. Click the "**Value Mapping**" button.
    iii. Click on the record type indicated on the error details page as the issue
    iv. Click the "**Edit Mapping**" button
    v. Click the text field under "**Value to Map**"
    vi. Enter test or scroll down until the correct CAREWare name of the record is located
    vii. Click on the record
    viii. Click Save
    ix. Delete the current import
    x. Reimport the file, the DIS will remember what has been mapped previously this time and no errors should appear.

Glossary

DIS (Data Integration System): The platform used to manage and import data files into CAREWare.

CAREWare: A software used for tracking and managing HIV care data.

File Summary: A page summarizing the data uploaded, including records ready for import and those ignored due to errors.

Import History: A list of all past data imports, including details like file name, date, and status of the import.

Record Count: The total number of records within an uploaded file.

Ready to Import: The number of records in a file that are ready to be processed into CAREWare.

Ignored Records: Records in the data that are manually ignored import due to user selection.

Error Details: Specific information about errors detected in an uploaded file that require resolution before import.

Value Mapping: The process of aligning incoming file data values to CAREWare fields.

2-Factor Authentication: A security process requiring both a password and a secondary authentication code for login.