

# Procedures for Implementing Direct Data Uploads to JWB

## What is it and why does our agency need it?

Direct Data Uploads is a way for funded Providers to directly upload their Provider participant data, **stored in their own data systems**, to JWB without entering participant data into the JWB data collection system, JWB FLEX. There are a few key advantages for Providers when they upload data via direct data uploads—those include:

- A Provider is able to maintain maximum control over their own individual data because it is stored in their own data system, including reporting and analysis capabilities.
- A Provider is able to avoid dual data entry, which save staff resources and improves data quality.
- Direct Data Uploads enable a Provider to have increased organizational capacity while also decreasing their data dependencies on JWB.
- Direct Data Uploads also enable Providers to have data collection systems that can track and collect other valuable data points such as volunteers, fundraisers, and other data points of interest to the Provider.
- The Provider has the ability to have all Provider data in one location regardless of funder or program.
- JWB is encouraging all providers to move to Direct Data Uploads over the next several years.

## What does Direct Data Uploads include/What it doesn't? – Participant Data vs. Financial Data

Direct Data Uploads only include participant data such as Demographics, Episodes, Services, Measures, Aggregate Services, and Follow-up Measures.

Direct Data Uploads **DOES NOT** include any financial data. Provider financial data will be submitted into the JWB FLEX. JWB FLEX is the designated software that a Provider will use to enter their Provider's financial information to receive financial reimbursement.

## When can a Provider use Direct Data Uploads?

A Provider can use Direct Data Uploads when they have their own data system that collects similar categories of information (demographics, episodes, services, measures, etc) at the participant or group level and have the ability to export the data into the specified format. Typically, this is a software system that is specifically used for collecting participant data, not an Excel sheet or manual collection of data. Depending upon the providers access to their system, data can be exported to Excel through reporting or exported directly from the database into the specified format.

Transitioning from entering into the JWB participant management system, JWB FLEX, to Direct Data Uploads will occur at the beginning of a new JWB Fiscal Year (FY) unless otherwise agreed upon. The months leading up to this date are spent reviewing requirements, providing technical assistance, setting up access to the JWB SharePoint Provider Uploader Page, receiving and testing sample data files, and

reviewing files for accuracy. During this time, JWB works internally to create and test import processes of a Provider's data to ensure data integrity and quality within the JWB data warehouse.

**Stages for getting ready to do JWB Direct Data Uploads**– Providers may be in different stages

Not all Providers are at the same stage of readiness to provide Direct Data Uploads. Below are some stages in which your organization may be currently at and some of the steps you may need to take to get there:

- **You have no Provider data system for collecting participant data or you use JWB's system as your only system of tracking participants:**
  - Consider what your needs are
  - Write a Scope of Work Document including time-line and the requirements to upload data to JWB
  - Determine your budget and other resources needed including staff
  - Plan for the funding the new data system (grants, reaching out to funders, fundraising, etc.)
  - Find out what systems other like agencies are using
  - Research systems and ask for demos for vendors
  - Provide the vendor your Scope of Work
  - Provide the vendor with the JWB Direct Data Upload Requirements to ensure they can meet the needs for uploading to JWB
  - Receive quotes
  - Consider the vendor's support, pricing models, project management, implementation, needed features, technology, ease of use, etc.
  - Check references
  - Decide on a vendor and negotiate the contract
  - Work with the vendor to implement the software
  - Reach out to your JWB Evaluator to schedule a call to discuss the upload process
- **You have a data system for collecting participant data but do not upload data to JWB:**
  - Reach out to your JWB Evaluator to schedule a call to discuss if uploads would be appropriate for your agency

**What is the process when a Provider decides that it wants to do Direct Data Uploads?**

Once a Provider has decided on doing Direct Data Uploads and they have a data collection system in place, the following steps should be complete to allow for the upload to begin. *This process can take anywhere from 6 months to 1 year to fully get through.* Providers are encouraged to start early.

1. Provider staff should reach out to their JWB assigned Evaluator for an initial meeting
2. During the meeting JWB will review the entire process with the Provider and perform a detailed review of the Data Upload General Requirements document which will be used as a starting place
3. JWB staff and Provider staff will discuss and document each field and note fields with exceptions, and additional requirements. This will result in a Provider Specific Data Upload document that will outline specific rules for all fields for the Provider.

4. Provider staff will work with vendors or IT staff at their agency to decide the best course of action for setting up the required fields and documents
5. Occasionally new fields may have to be added to the Provider data system to meet the needs JWB data requirements. Such fields should be added and populated in the Provider data system.
6. A plan will be developed and a timeline will be established between the Provider and JWB that allows for the transition to occur at the beginning of a fiscal year.
7. Certain fields will be obtained through JWB. These fields include the Provider ID, Program IDs, and any applicable Site IDs. JWB will provide these fields to the Provider who must include them with the required files.
8. The Provider should work towards creating the required files in the specified format following the specific rules agreed upon in Provider Specific Data Upload document.
9. Several months prior to the fiscal year transition JWB will request information on the Provider assigned user(s) who will be setup with access to the JWB SharePoint Provider Uploader Page. This access will allow the Provider user the ability to upload the documents directly to the secured JWB server, encrypting the data during transit. JWB will set up a program specific document library for the Provider on JWB's SharePoint where the files can be dropped, and instructions will be provided.

JWB requires the following information for the Provider user assigned to perform the upload:

- A signed and completed JWB SharePoint Access Request Form
10. After a user has been granted access JWB will add the user to their program specific Data Upload SharePoint Document Library. These credentials are not to be shared with or used by anyone else in that Provider. Sharing credentials is against IT Security best practices and also against JWB Security policies.
  11. At least 2 months prior to the transition, the Provider should upload trial or test files for each required file type with a sample of the required data to the JWB SFTP server. JWB will review the files and provide feedback to the Provider on any corrections that may be required and will work with the Provider on remediations that will enable successful uploads.
  12. Upon completion of testing, a go live date will be set for the beginning of JWB's fiscal year. The Provider's contract(s) will include a special condition outlining the data upload requirements. After contract execution the Providers will be responsible and contractually bound to upload their data files by the 20<sup>th</sup> of each month. If the 20<sup>th</sup> should fall on a weekend the immediate Monday after that will be the required upload date. Once the file is uploaded, JWB will review the file and provide feedback on any data corrections that are needed. These data corrections shall be corrected in time for the next month's data uploads, unless otherwise communicated to JWB.
  13. If the Provider is transitioning from the JWB data entry system (FLEX), a transition plan and time-line will be developed with the Provider and JWB on specific steps to follow for the transition of data.

Attachments:

JWB Data Uploads Guidelines

Sample Files