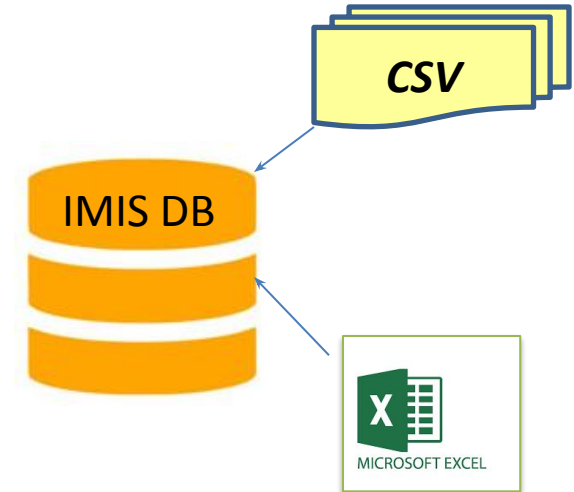


# IMIS bulk upload

- Upload candidates
- Overview of Change
- Topics to consider/Challenges
- Possible interface



# Upload candidates

## Administration Menu

ICD codes (currently available)  
Location structure  
Items / Services  
Health facilities + catchment  
Pricelists Items Services HFs  
Claim administrators  
Enrolment officers + area  
Payers

## Enrolment (possibility)

Families (**Products must exist prior to upload**)

Policies

Premiums

**Lists** (not needed but possible)

ConfirmationTypes

IdentificationTypes

Languages

Legalforms

Educations

Health Facility Details

Legal Form: Government  
Level: Health Centre  
Sub Level: -- Select SubLevel --  
Code: 00169  
Name: Mtitaa  
Address: Bahi  
Region: Region

Region

REGION
<input type="checkbox"/> Region
<input type="checkbox"/> Funding
<input checked="" type="checkbox"/> Morogoro
<input type="checkbox"/> Dodoma

District

DISTRICT
<input checked="" type="checkbox"/> Gairo
<input type="checkbox"/> Kilombero
<input type="checkbox"/> Kilosa
<input type="checkbox"/> Morogoro DC
<input type="checkbox"/> Morogoro MC
<input type="checkbox"/> Mvomero
<input type="checkbox"/> Ulanga

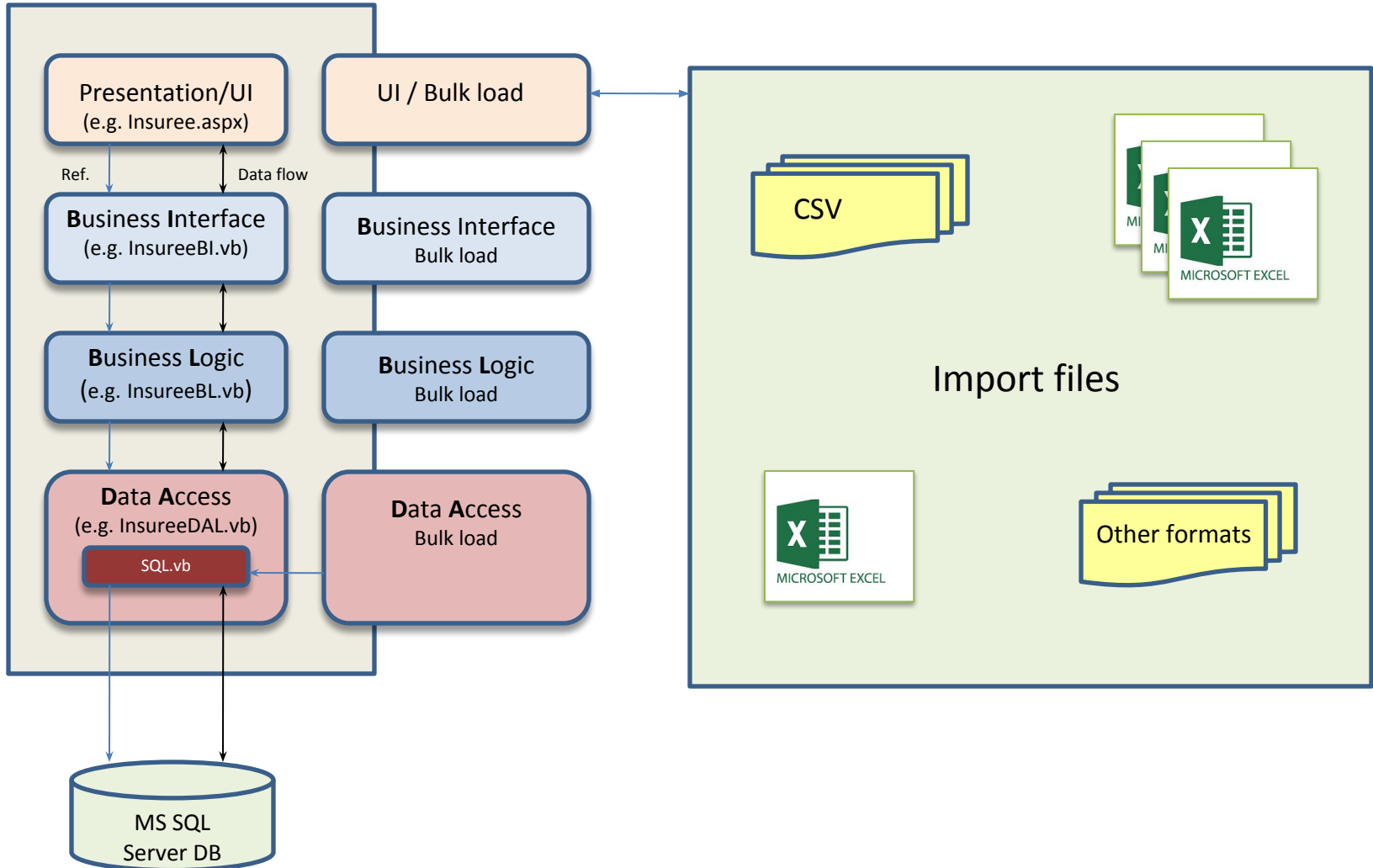
Ward

WARD
<input type="checkbox"/> Chagongwe
<input type="checkbox"/> Chakwale
<input checked="" type="checkbox"/> Chanjale
<input type="checkbox"/> Chigela
<input type="checkbox"/> Gairo
<input type="checkbox"/> Idibo
<input type="checkbox"/> Italagwe
<input type="checkbox"/> Iyogwe

Village

VILLAGE	CATCHMENT
<input checked="" type="checkbox"/> Chanjale	100
<input checked="" type="checkbox"/> Ching'holwe	100
<input checked="" type="checkbox"/> Kumbulu	100
<input checked="" type="checkbox"/> Lukando	100
<input checked="" type="checkbox"/> Mamvisi	100

# Overview of change



## *Topics to consider/Challenges*


- Choice of upload?
  - Excel
  - CSV flat file or others (XML?)
  - Combinations of import formats?
- In case an entity is uploaded than strong validation procedures must be in place
  - E.g. Health facility can only have a Legal form that exists.
  - E.g. An insuree can only have a profession that is in the list of Professions and must belong to an existing Head of family
- One to Many relationship (e.g. HF and Catchment area) → What is the best upload media?: Excel, CSV, XML?
- What about imports that have partially succeeded (commit or rollback?)
  - If not successful , what sort of report we process for follow up?
- Import only in certain **sequence** for mass upload of more than 1 entity
- Follow business rules for inserts and updates (e.g. Legacy record inserts)

## ***Topics to consider/Challenges....continued***

- What about imports that include already uploaded records amongst new ones
  - Overwrite existing records and amend new ones
  - Provide perhaps an option how to import
    - Amend new records only
    - Amend and Update existing records
    - Amend and Update and Delete
    - Full commit only vs. partial success
- Provide an excel template for each upload with possible some BL in it?
  - Mandatory fields (highlighted)
  - Masking of fields with custom mask
    - Numbers only
    - Max text length
    - Allows 3 characters etc..
  - Combo boxes for restricted options
- Upload provided with **codes** but inserted with Ids in the database as PK (Primary Key).
- Exceptions found in uniqueness of record (Code)
  - e.g. Payers. Another verification needed uniqueness

## *Possible interface for bulk upload*

The interface is a light gray window with a blue border. It contains a list of radio buttons on the left, a text input field and a folder icon on the right, a list of checkboxes on the right, and three buttons at the bottom.

Locations  

Items

Services

Enrolment Officer  
 Area

Health Facilities  
 Catchment

PriceList Items

PriceList Services

Claim Administrator


Payers


Full commit only

Insert

Update

Delete

 **IMPORT**

 **VALIDATE**

**Exit** 