

This document briefly describes the procedure for uploading CoreQ Long-Stay data, CoreQ Short-Stay data, and CoreQ Assisted Living data into LTC Trend Tracker. LTC Trend Tracker now allows this data to be entered **only** via Excel spreadsheet. **Note:** Your organization's account administrator sets user permissions, including access to upload CoreQ data. If you do not have user permission for this task and need it, please contact your account administrator.

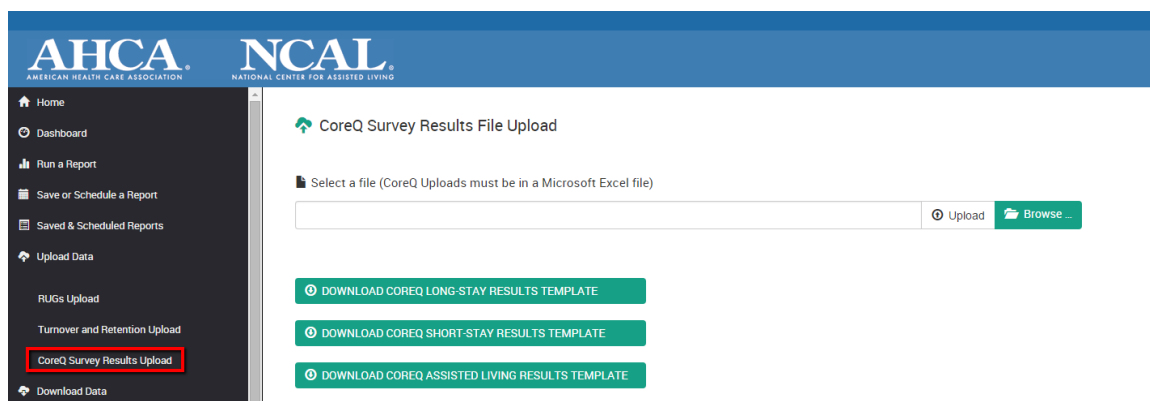
### Before You Begin...

You should know:

1. Your Excel file must be saved in EXCEL format.
2. Where the file is located on your hard drive or server.
3. The file name.
4. You may upload more than one building and more than one month at a time.

### To Upload CoreQ Data

1. Click on **"Upload Data"** on the left-hand side of the screen
2. Click on **"CoreQ Survey Results Upload"** in the drop down listing.



3. Get the correct CoreQ Survey Results Upload Template using one of the download template links below.

[DOWNLOAD COREQ LONG-STAY RESULTS TEMPLATE](#)

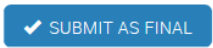
[DOWNLOAD COREQ SHORT-STAY RESULTS TEMPLATE](#)

[DOWNLOAD COREQ ASSISTED LIVING RESULTS TEMPLATE](#)

**TIP:** Be sure to make a note of the location where the file was saved.

- a. Please note that there may be more than one type of template available, depending on which type of survey data you will be uploading.
4. After the download completes, open the file.
  5. Enter your data into the worksheet.

**TIP:** If you do not know your NCAL ID or Medicare Provider Number, please use our [NCAL ID & Medicare Provider Number Lookup](#) function.

6. When you are finished entering your data, save the file, and make note of the location on your computer where it was saved.
7. Click on the **"Browse"** button, to find the file on your computer or server.
8. Find your saved Excel file in Excel format:
  - a. Select the drive containing the file.
  - b. Select the folder containing the file.
  - c. Select the name of the file you want to upload.
  - d. Click the **Open** button.
9. Click **"Upload"**
  - a. The pop-up window should close, and you should be on the "CoreQ Survey Results Upload" screen with the name of the file displayed on the screen.
  - b. If you select the wrong file, use the **"Remove"** button to clear the file from the upload box.
10. After a short wait time, you will be notified of whether the file was accepted by the system. If your file was accepted (where no Error Messages are listed), and you are sure the worksheet you selected had the correct data, click on the  button to upload the file. If there are error messages displayed, **return to step 5** to correct the issues, and try again.

## Errors Messages

### A. Check for Valid FPN Sizes

- a. *SNF FPNs must be 6 characters in length, with no more than one alpha character*
  - i. Error Message Example: Line Number <x>: <Medicare Provider Number OR NCAL ID Number> '<value>' is invalid and must be 6 characters in length.
- b. *AL NCAL IDs must be 6 characters in length, begin with an "A", and have 5 remaining numeric characters*
  - i. Error Message Example: Line Number <x>: <Medicare Provider Number OR NCAL ID Number> '<value>' is invalid and must be 6 characters in length.

### B. If all FPN sizes are valid, then check for valid FPN (matches demographics) and check for user permissions.

- a. *The FPN must exist in the demographics file*
  - i. Error Message Example: Line Number <x>: The value '<value>' in <Medicare Provider Number OR NCAL ID Number> does not match a value in the system. Please confirm the value and re-upload the file. If the value you entered is correct but generates this error, please contact [help@ltctrendtracker.com](mailto:help@ltctrendtracker.com) for assistance.
- b. *The Center or Community specified by the FPN/NCAL ID must be accessible to the user performing the upload*
  - i. Error Message Example: Line Number <x>: The value '<value>' in <Medicare Provider Number OR NCAL ID Number> is not currently attached to your organization. Please confirm the value and re-upload the file. If the value you entered is correct but generates this error, please contact [help@ltctrendtracker.com](mailto:help@ltctrendtracker.com) for assistance.

- c. *The Center or Community specified by the FPN/NCAL ID must be accessible to the user performing the upload*
  - i. Error Message Example: Line Number <x>: The value '<value>' in <Medicare Provider Number OR NCAL ID Number> is not currently attached to your user account. Please confirm the value and re-upload the file. If the value you entered is correct but generates this error, please contact [help@ltctrendtracker.com](mailto:help@ltctrendtracker.com) for assistance.

**C. If valid FPNs and valid permissions valid, then confirm center types**

- a. *For an SS or LS upload, only SNFs to be provided, for an AL upload, only ALs provided*
  - i. Error Message Example: Line Number <x>: The value '<value>' in <Medicare Provider Number OR NCAL ID Number> is not the correct type for this file. Please either confirm the value and re-upload the file, or apply this row and upload with another type of file. If the value you entered is correct but generates this error, please contact [help@ltctrendtracker.com](mailto:help@ltctrendtracker.com) for assistance.

**D. Check dates**

- a. *Month value must be a whole number between 1 and 12*
  - i. Error Message Example: Line Number <x>: Column <Report Month> has an invalid month '<value>'. Please correct the calendar month for each community/center and resubmit the Excel file.
- b. *Must not be more recent than the current month*
  - i. Error Message Example: Line Number <x>: Column <Report Month> has an invalid month '<value>' for the current year. It cannot be in the future. Please correct the calendar month for each community/center and resubmit the Excel file.
- c. *Reference date cannot be prior to January, 2015*
  - i. Error Message Example: Line Number <x>: Column <Report Year> has an invalid year '<value>'. Please correct the calendar year for each community/center and resubmit the Excel file.

**E. If valid FPNs, valid FPN permission, valid FPN types and valid dates, then dups check**

- a. *Validate there are no duplicates -- rows with the same reference date and FPN.*
  - i. Error Message Example: Line Number <x>: Contains a duplicate FPN/NCAL ID-date combination: '<value>' in Column <Medicare Provider Number OR NCAL ID Number> and '<value>' in Column <Report Year> and '<value>' in Column <Report Month>. Please check the Excel file and resubmit it.

**F. If error free to this point, numbers checks**

- a. *If any cell in the Resident/Patient survey results for a row are empty, then they must all be empty*
  - i. Error Message Example: Line Number <x>: Patient/Resident columns <Number of Respondents>, <Response Rate>, <Satisfaction Rating (%)> must all be empty or must all have a value. Please correct data and resubmit the Excel file.
- b. *If any cell in the Family survey results for a row are empty, then they must all be empty*
  - i. Error Message Example: Line Number <x>: Family columns <Number of Respondents>, <Response Rate>, <Satisfaction Rating (%)> must all be empty or must all have a value. Please correct data and resubmit the Excel file.

- c. **(LS and AL)** Rows must contain results for at least one of the two survey respondents (Resident/Patient or Family)
  - i. Error Message Example: Line Number <x>: Line is missing survey results. Please correct data and resubmit the Excel file.
- d. **(SS)** Rows must contain results for Resident/Patient
  - i. Error Message Example: Line Number <x>: Line is missing survey results. Please correct data and resubmit the Excel file.
- e. Response Rates must be between 0 and 100%
  - i. Error Message Example: Line Number <x>: Column <Response Rate> has an invalid rate '<value>'. Response rates must be a number between 0 and 100%. Please correct data and resubmit the Excel file.
- f. Response Rates must be between 0 and 100%
  - i. Error Message Example: Line Number <x>: Column <Response Rate> has an invalid rate '<value>'. Response rates must be a between 0 and 100%. Please correct data and resubmit the Excel file.
- g. Survey Ratings must be between 0 and 100%
  - i. Error Message Example: Line Number <x>: Column <Satisfaction Rating (%)> has an invalid rate '<value>'. Satisfaction ratings must be a number between 0 and 100%. Please correct data and resubmit the Excel file.
- h. Survey Ratings must be between 0 and 100%
  - i. Error Message Example: Line Number <x>: Column <Satisfaction Rating (%)> has an invalid rate '<value>'. Satisfaction ratings must be between 0 and 100%. Please correct data and resubmit the Excel file.
- i. Number of Respondents should be a positive whole number
  - i. Error Message Example: Line Number <x>: Column <Number of Respondents> has an invalid value '<value>'. The number of respondents should be a whole number. Please correct data and resubmit the Excel file.
- j. Number of Respondents should be a positive whole number
  - i. Error Message Example: Line Number <x>: Column <Number of Respondents> has an invalid value '<value>'. The number of respondents should be a positive whole number. Please correct data and resubmit the Excel file.
- k. **(Only checked if we are error free on all the previous number checks)** If the response rate is greater than 0%, the number scored needs to be > 0
  - i. Error Message Example: Line Number <x>: Column <Number of Respondents> must have a value greater than 0 when <Satisfaction Rating (%)> is greater than 0. Please correct data and resubmit the Excel file.

### G. Vendor Collision Check

- a. Data supplied through the LTC Trend Tracker interface (user) must not override data uploaded through the API (vendor)

- i. Error Message Example: Line Number <x>: Data cannot be overwritten for this row since it has already been vendor loaded. Please contact [help@ltctrendtracker.com](mailto:help@ltctrendtracker.com) for further assistance.