



Spok Go® - File Upload Specifications
Care Team Roles

Version 3.0

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Introduction

This document is intended to be a guide to help the reader understand the Spok Go Care Team Roles Upload.

Scope

This document describes the requirements and technical specifications for the proper use of the data file upload.

Intended Audience & Use

This document is intended for all personnel involved in the administration and support of the data file upload (specific to Care Team Role data) as well as the users of the Spok Go system to which the uploaded Care Team Role data will be inserted or updated. The document has the following intended uses:

- Validation of data to be loaded and understanding of the processes and requirements/business rules for the data file upload.
- Understanding by Spok's Professional Services Group (PSG) as well as the Spok Go customer regarding the technical specification and supported layout of the data file upload.
- A development specification and reference for the data file upload.

Requirements

The following sections will outline the various requirements for the success of the Spok Go Care Team Roles File Upload.

System Requirements

The following are system requirements.

- A comma separated file called `careteamrolesdataload.[CCYYMMDDHHMMSS].csv` (where [CCYYMMDDHHMMSS] is the date/time of the file's creation by the source system) with fields in the order that is defined later in this document.
- An SFTP client (SFTP enables file transfers over SSH) that is capable of transferring files to Spok Go's on-premises Gateway.

Resource Requirements

The following resources will be required for implementation of the Spok Go Care Team Roles File Upload:

- A Customer's Source System Data Administrator - this resource is responsible for the creation of the previously mentioned `careteamrolesdataload.[CCYYMMDDHHMMSS].csv` as well as for the data integrity of the file.
- Spok Professional Service Group (PSG) resource - this resource is responsible for enabling the Spok Go File Upload connector for the Customer's Spok Go system as well as for guiding the Customer through using these specifications for the creation and transfer of the Care Team Roles file.

Connection Requirements

The following are the connection parameters to the on-premise Gateway for the Spok Go Communication Group File Upload:

GATEWAY	: [FQDN or IP address of the Gateway's Load Balancer]
USERNAME	: [Auto-generated during setup, provided by PSG resource]
PASSWORD	: [Auto-generated during setup, provided by PSG resource]
PORT	: 22

File Formatting Expectations

Each row in the CSV file represents one Care Team Role record. The v3.0 version of the Spok Go Care Team Roles File Upload specifications supports a maximum of 21 fields and therefore expects 20 “,” commas to delimit the first 20 fields.

Then, instead of a “,” comma, the 21st or last field for each record should be terminated with a carriage return/line feed combo (CRLF) unless it is the last or only record in a file in which case the terminating CRLF is optional.

Field Formatting Expectations

The `careteamrolesdataload.[CCYYMMDDHHMMSS].csv` file will utilize a simple set of three characters to separate fields, sub-fields separators and repetitions within fields.

- A “,” comma is used to separate fields
- A “;” semi-colon is used to separate sub-fields within a single field
- A “|” pipe character is used to separate one-to-many repetitions of data in a single field
- A “~” tilde is used to separate sub-fields within a single **sub** field
- A “:” colon character is used to separate one-to-many repetitions of data in a single **sub** field

The use of any of these characters as actual data within any of the fields that are defined below is not supported.

Other Considerations

1. Pre-loaded Roles
2. Pre-loaded with Location info (facilities and/or units)
3. Pre-loaded with Departments, Specialties and Devices/pagers (if associated to a Care Team Role)

Field Mapping

The following table shows which Care Team Role details can be loaded into the Spok database in the field order that follows.

Fields in this table are both numbered and lettered (ex: 5(E)) to aid in counting and referring to specific fields as well as for providing an easy cross-reference to alpha column headers if the file is viewed in a spreadsheet application.

Field	Description	Required for Full Operation	Required? Conditional?	Supports Repeats?	Format	Spok attribute
1(A) Targeted Spec Version	Version of the specs that the provided file is targeting		✓		Expected value: 3.0	
2(B) File Type	Specifies the file's purpose for subsequent processing within Spok Go		✓		Expected value: CARETEAMROLE	
3(C) Operation	Indicates whether the import will be a full metadata import or status only		✓		Expected value: "FULL" or "STATUS"	
4(D) External ID	A unique ID for an employee from the file's source system				ExternalID	External ID
6(F) Location	Location to which a care team role is associated				LocationType;LocationName	Example: Region;West Must match existing location record in Spok Go in order to be associated with a Location. The type for the Location that is being associated to the group must be configured as an entity association with a Care Team Facility.
7(G) LocationExternalId	Unique/external ID of location(s) to which the employee is associated with. If this field is populated, column 6(F) is not needed.		✓		Location Id	
8(H) Unit Locations(s)	For Unit Level Care Team role, Unit child locations of			✓	LocationType;LocationName	Example: Region;West~Facility;Fairview~Unit;ICU

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Field	Description	Required for Full Operation	Required? Conditional?	Supports Repeats?	Format	Spok attribute
	Location specified in 6(F)/7(G) to which the Care Team Role is associated.				<i>(repeating, separated by a pipe ~ for each level, representing associated location and all ancestors and to separate data for each Unit</i>	Region:West~Facility:Fairview~Unit:ObGyn Must match existing location record in Spok Go in order to be associated with a Location. The type for the Location that is being associated to the group must be configured as an entity association with a Care Team Unit.
9(I) Unit External Id(s)	A unique Id for the Unit in the source system if one exists					
10(J) Location Level	Simple indicator of the location level to which the Care Team Role is associated		✓		"FACILITY" or "UNIT"	
11(K) Functional Role	The functional (staff) role to which this Care Team Role is associated.		✓		Role name	Must match an existing functional (staff) role record in Spok Go to allow the Care Team Role to be associated to a functional role.
12(L) Functional Role External Id						

Field	Description	Required for Full Operation	Required? Conditional?	Supports Repeats?	Format	Spok attribute
13(M) Care Team Role Unique ID	Unique ID of the Care Team Role (must be unique to a functional role within a facility)		✓		Free text, spaces allowed	Case-insensitive searches for unique values will either result in the creation of a new Care Team Role or an update to an existing Care Team Role using the data fields that follow. Care Team Role Names that are not unique to a functional role within a facility are not supported
14(N) Specialty	Practitioner specialty(ies) to which the Care Team Role is associated			✓	Specialty name	Must match existing specialty record in Spok Go in order to be associated with a Care Team Role.
15(O) Specialty External Ids						
16(P) Department	Practitioner department(s) to which the Care Team Role is associated			✓	Department name	Must match existing department record in Spok Go in order to be associated with a Care Team Role.
17(Q) Department External Ids						
18(R) Device Number (Pager ID)	Pager ID that is assigned to the Care Team Role				Numeric value	Must match existing device record in Spok Go in order to be associated with a Care Team Role.
19(S) Device External Id						
20(T) Status	Sets the record's active vs. inactive status				"ACTIVE" or "INACTIVE"	The active/inactive status of each record
21(U) Timestamp	Date and time the new/updated communication group record was written to the file		✓		CCYYMMDDHHM MSS	

Data Upload Details

The following section explains field-level specifics that should help ensure the successful implementation of the Spok Go Care Team Roles File Upload.

Fields and/or sub-fields that are **grayed-out** are reserved for future use and will not be used when adding or updating a Spok Go user's info at this time. However, these fields and sub-fields can still be populated in preparation for their planned purpose without negatively impacting the processing of a user record.

- 1) Note that if this file is viewed in a spreadsheet application, these fields may not display as intended due to the application's default field formatting. Changing the displayed format of these fields' columns should allow a reviewer to see the column's contents as expected.

Integration Risks

The following are possible risks that have been identified:

- Non-curated source data with duplicates or inaccurate data.
- Irregular or inconsistent output of files from source system.
- Poorly formatted CSV files
- Inclusion of incorrect data that cannot be corrected by subsequent Care Team Role file uploads (ex: incorrect facilities/units associated with a Care Team Role)

Integration Success Criteria

The integration will be considered successful if the following criteria are met:

- The Spok Go Care Team Roles File Upload is implemented per the specifications in this document and Care Team Roles have been added to Spok Go as expected.

Revision History

The table that follows will provide a history of changes that are made to this document.

Date	Comment(s)	Author
2020.07.20	Initial v1.0 of these specs	Todd Thomas
2020.07.21	Added verbiage to indicate the need for unique Care Team Role Names	Todd Thomas
2020.07.29	Added region. Needs to be paired with Facility to locate the correct record.	Joe Decker
2020.08.04	Reordered the fields and revised some verbiage given the new understanding that care team roles are specific to three-way association with facilities and functional roles	Todd Thomas
2020.11.10	Added field to represent external ID's from Spok consoles or other third party systems	Zach Hanson
2020.11.18	Renaming 'Care Team Role Name' to Care 'Team Role Unique ID'	Paola Gonzalez
2020.11.24	Added "Operation" field to indicate a full update or a status update on the entity. Also changed version to 2.0 to be in synch with other import specifications.	Zach Hanson
2020.11.30	Added future consideration for active vs. inactive status for Care Team Roles	Zach Hanson
2021.01.15	Create v2.0 revision	Sunil Bhujle
2021.03.04	Create v2.1 revision – External ID association to other entities	Sunil Bhujle
2021.9.20	Updated to support 3.0 spec and new location associations	Zach Hanson Paola Gonzalez