Special Instructions for Preparing Active Client and Participant Caregiver Indicators in CSV Templates

The ActiveClient field indicates whether a client is “active” or “inactive” in receiving Healthy Start services during a particular calendar year. Allowed values for this field are 4-digit years, for example “2017;2018,” which indicates the client was/is active in calendar year 2017 and 2018.

The ParticipantCaregiver field indicates whether the reported client is a participant, who receive services, or a non-participant caregiver, who does not receive services. Non-participant caregivers include non-mother caretakers such as grandparent or father. . Allowed values for this field are “true” (or “1”) or “false” (or “0”). Value ”true” (or “1”) means the client is a participant, and in most cases means the client is the mother of the child.

1. The two new columns “ParticipantCaregiver” and “ActiveClient” **must** be added after column “ConsentFlag” in **all the non-child** CSV templates. SeeFigure 1 for visual illustration.
	1. **Which CSV templates are affected, and which ones are not?**

Affected templates (must add the two columns): Demographic, PregHistory, Preconception, Prenatal, Postpartum, and Parenting.

Not affected (no change to the template): PrevPregnancy, PostPartumBaby, and ParentingBaby.

* 1. **What will happen if I use my old CSV files?**

The conversion will fail.

* 1. **What will happen if I inserted the two columns in a different location?**

The 3rd and 4th columns would still be interpreted as “ParticipantCaregiver” and “ActiveClient” so the values in the converted XML would likely be in the incorrect format. The system may generate an XML file, but it would fail during the XML upload when validation of the values occurs.

* 1. **Do I have to name the columns “ParticipantCaregiver” and “ActiveClient”?**

No, you can name the columns based on what is convenient for you (e.g. using the field name from your own system). HSMED reads the columns by what order they are in, so the 3rd column will always be read as ParticipantCaregiver and the 4th column will always be read as “ActiveClient.”

1. For successful XML upload, the two fields are required for Tool 1 - Demographic but are optional for the other tools. When preparing CSV files for tools 2 - 6, if you do not intend to provide a value for these two fields, the columns are still needed but the cells can be left blank.
	1. **Is this the same, or different than how other fields work?**

The “missing” value works the same way as other fields. If no value is provided for a column, the data element will not be included for that client in the converted XML. For Tool 1 however, values must be provided for each client.

1. **Only** for the field of ActiveClient, please use the semicolon (;) and not the comma (,) as the delimiter. For example, use “2016; 2017” to indicate this client was active in calendar year 2016 and 2017.
	1. **Remind me how do I include multiple values for other fields?**

All other fields that allow multiple values need to use commas (,) as the delimiter.

* 1. **Why is this field different?**

If you open the CSV file using Microsoft Excel and try to use commas for this field, you will see that “2016,2018” gets converted to numeric value “20,162,017” automatically. This is because Excel recognizes commas (,) as the default thousands separator. Changing how Excel interprets values for that one column is not possible since the file is saved and uploaded as a CSV and changes like that cannot be saved in that format.

* 1. **Should I include a space after semicolon (;)?**

For this field, whether you include a space or not does not matter. HSMED accepts both ways. Please note that for the other fields, space is not allowed after commas (,).

Figure 1: CSV Example

