

IMPORT MANAGEMENT

Import Management on the navigation pane contains three sections:

- **File Import:** where file upload is initiated and review of the history of imported files is available.
- **Integration:** where data is viewable from automatically transferred external systems, like the Electronic Donor Record (EDR) or TISNet.
For further information on the EDR integration, refer to [Deceased Donor Enrolments- Laboratory Portal, OM-042](#).
- **Staging:** where any errors, duplicates or orphan records are placed due to integration or file imports, for further investigation.

IMPORTING DATA

Data can be transferred to OrganMatch using an Import File or Integration. Data transfer is managed in the same manner using either the manual import file or integration. In this document, integration of data from TISNet lab system functionality is the same as importing the data manually using Import functionality.

FILE IMPORT

For data imported via File Import, OrganMatch will:

- Validate the file format to ensure it meets any formatting rules, that mandatory fields are included, and any business rules re data entry have been applied.
- Attempt to find a match for any person you are importing demographic data for.
- Attempt to match the demographic data, sample information or test results against data already held in the system – using different parameters depending on the file being imported e.g. First Name (or first word of the first name), Last Name, Sample ID, Test Reference.
- If a user imports a file, **Imported By** will default to the username, and **OM Lab** will default to their OrganMatch lab.
- Multiple files can be uploaded. You do not need to wait for each file to finish loading before queuing the next file.
- OrganMatch automatically verifies imported test results as results would be authorised in an external lab system.
- When importing a demographic file, OrganMatch will import and create the person record but does not create an enrolment. Results can be transferred into the record without an enrolment being created. To create the enrolment, this record can then be selected through the registration and enrolment process in the Transplantation Portal.

INTEGRATION

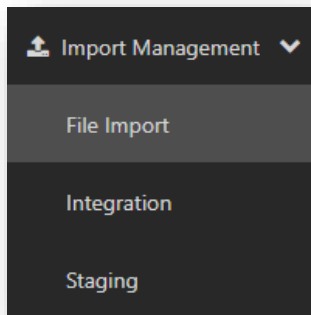
Data is automatically transferred from the external system (TISNET) and the Integration files can be viewed through this menu. The filters below can be used to select the type of file transferred, for example Demographics or Samples, or search for a specific person record.

For data imported via Integration, OrganMatch will:

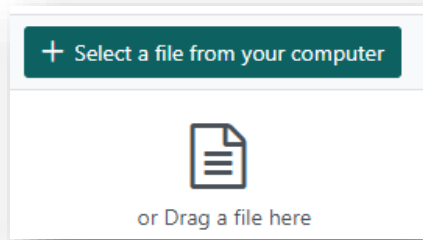
- Validate the file format to ensure it meets any formatting rules, that mandatory fields are included, and any business rules re data entry have been applied.
- Attempt to find a match for any person when demographic data is transferred.
- Attempt to match the demographic data, sample information or test results against data already held in the system – using different parameters depending on the file being transferred e.g. First Name (or first word of the first name), Last Name, Sample ID, Test Reference.
- The result transferred is verified and labelled as a system import.
- When a demographic file is transferred, the person record is created without an enrolment. Results can be transferred into the record without an enrolment being created. To create the enrolment, this record can then be selected through the registration and enrolment process in the Transplantation Portal.

1.1 IMPORT DEMOGRAPHICS

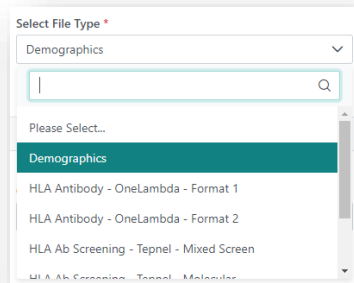
1. Click **Import Management**. Then click **File Import**.



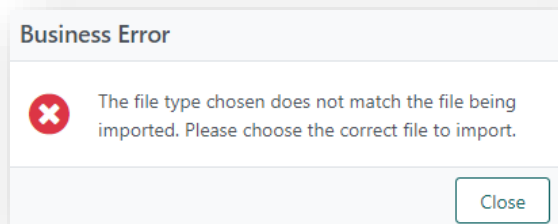
2. Drag the file to the import screen or click **Select a file from your computer** and browse for the location of your file.



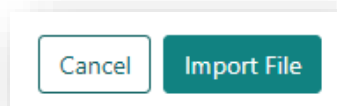
3. In the **Select File type** drop-down list select **Demographics**.



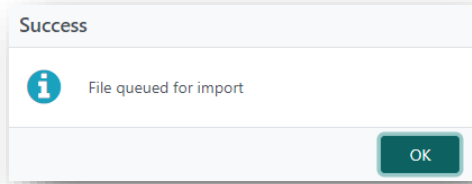
Note: The file format needs to match the expected format of the file selected for import. If it does not, an error message is displayed.



4. Click **Import File**.



- Click **OK**.



- The imported results will appear in the **Import history**. The table displays the number of records imported and the number sent to staging. See for further details on actioning results in [Staging Records](#).

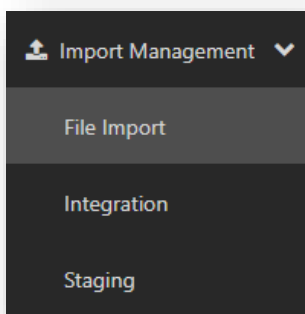
The screenshot shows the "Import history" interface. At the top, there are two dropdown menus for "OM Laboratory" (set to "All") and "File Type" (set to "All"). To the right, there are "Reset Filters" and "Refresh" buttons. Below the filters is a table with the following data:

Date & Time T1	OM Lab T1	Imported By T1	File Type T1	File Name T1	Status T1	Total Records T1	Imported T1	Sent To Staging T1
16/05/2023 11:37	NSW	[REDACTED]	Demographics	nomdemo.txt	Completed	4	0	4

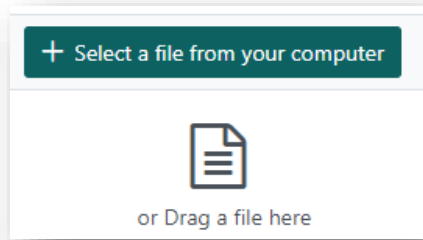
At the bottom right of the table area, it says "43588 records found".

1.2 IMPORT SAMPLES

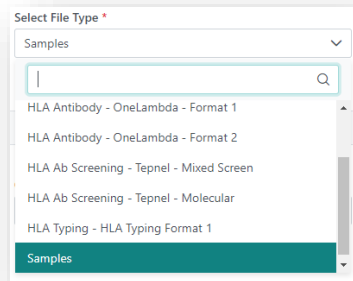
- Click **Import Management**. Then click **File Import**.



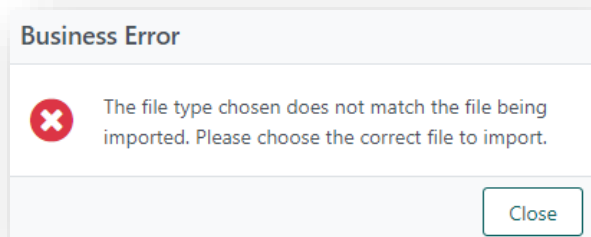
2. Drag the file to the import screen or click **Select a file from your computer** and browse for the location of your file.



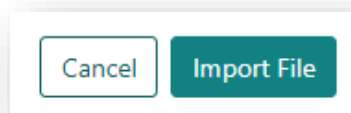
3. In the **Select File type** drop-down list select **Samples**.



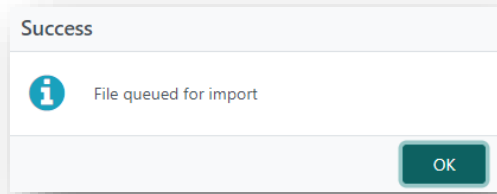
Note: The file format needs to match the expected format of the file selected for import. If it does not, an error message is displayed.



4. Click **Import File**.



- Click **OK**.



- The imported results will appear in the **Import history**. The table displays the number of records imported and the number sent to staging.

For further details on actioning results, refer to [Staging Records](#).

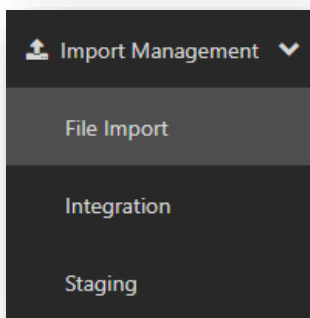
The screenshot shows the "Import history" interface. At the top, there are two dropdown menus: "OM Laboratory" (set to "All") and "File Type" (set to "All"). To the right of these is a "Reset Filters" link and a "Refresh" button. Below the filters is a table with the following data:

Date & Time T1	OM Lab T1	Imported By T1	File Type T1	File Name T1	Status T1	Total Records T1	Imported T1	Sent To Staging T1
16/05/2023 13:43	NSW	[REDACTED]	Samples	noms.txt	Completed	8	0	8

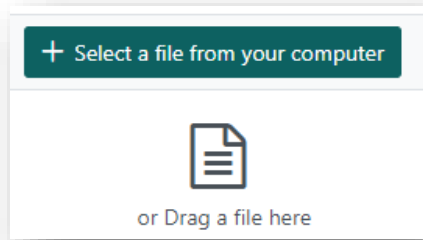
At the bottom right of the table area, it says "43624 records found".

1.3 IMPORT HLA TYPING RESULTS

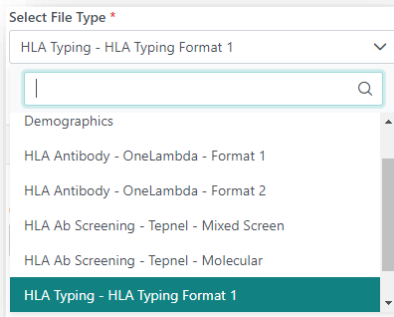
- Click **Import Management**. Then click **File Import**.



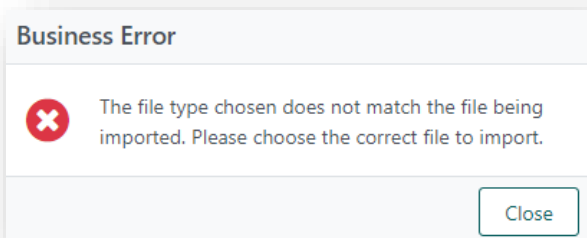
2. Drag the file to the import screen or click **Select a file from your computer** and browse for the location of your file.



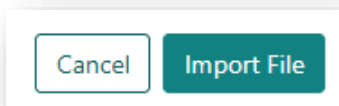
3. In the **Select File type** drop-down list select **HLA Typing- HLA Typing Format 1**.



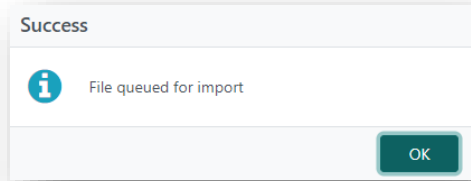
Note: The file format needs to match the expected format of the file selected for import. If it does not, an error message is displayed.



4. Click **Import File**.



- Click **OK**.



- The imported results will appear in the **Import history**. The table displays the number of records imported and the number sent to staging.
For further details on actioning results refer to [Staging Records](#).

The screenshot shows the "Import history" interface. It includes two dropdown menus for "OM Laboratory" (set to "All") and "File Type" (set to "All"). A "Reset Filters" link is on the right. Below the filters is a table with the following data:

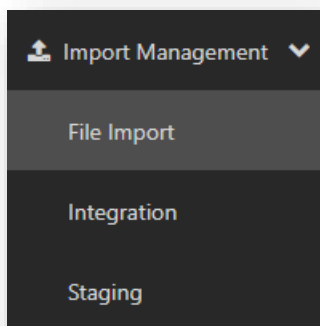
Date & Time	OM Lab	Imported By	File Type	File Name	Status	Total Records	Imported	Sent To Staging
21/04/2023 10:19	VIC	[REDACTED]	HLA Typing - HLA Typ...	HLA Typing_deceased donor.bit	Completed	11	10	1

At the bottom right of the table, it says "43272 records found" and there is a "Refresh" button.

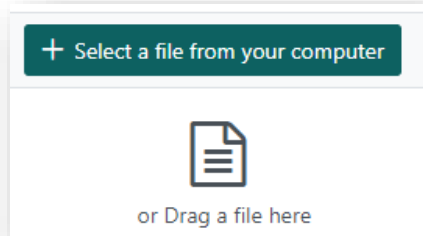
- The notification **New HLA Typing test result added** is generated in the Laboratory Portal.

1.4 IMPORT HLA ANTIBODY RESULTS

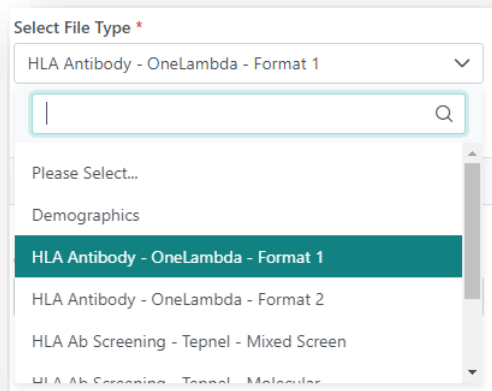
- Click the **Import Management** menu item then click **File Import**.



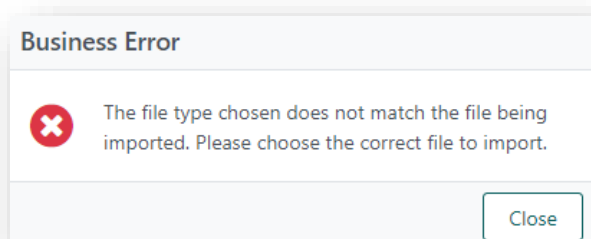
2. Drag the file to the import screen or click **Select a file from your computer** and browse for the location of your file.



3. In the **Select File Type** drop-down list select **HLA Antibody- OneLambda- Format 1 (NSW, SA, VIC)**, **HLA Antibody- OneLambda- Format 2 (WA)** or **HLA Ab Screening- Tepnel- Mixed Screen/Molecular (QLD)**.



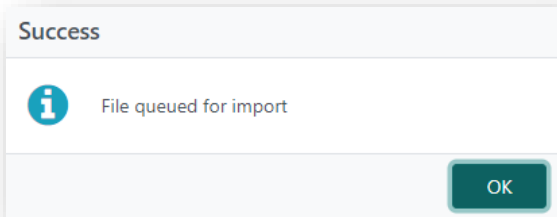
Note: The file format needs to match the expected format of the file selected for import. If it does not, an error message is displayed:



- Click **Import File**.



- Click **OK**.



- The imported results will appear in the **Import history**. The table displays the number of records imported and the number sent to staging.

For further details on actioning results refer to [SStaging Records](#).

Import history

OM Laboratory: All | File Type: All | [Reset Filters](#)

[Refresh](#) | 43622 records found

Date & Time	OM Lab	Imported By	File Type	File Name	Status	Total Records	Imported	Sent To Staging
16/05/2023 15:19	NSW	[REDACTED]	HLA Antibody - OneLa...	AustraliaLABScreenConfirm20180...	Completed	1	0	1

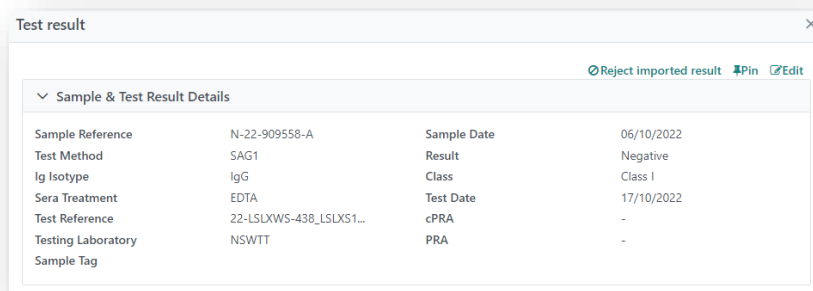
- The notification ***New HLA Antibody test result added*** is generated in the Laboratory Portal.

1.5 REJECTING IMPORTED RESULTS

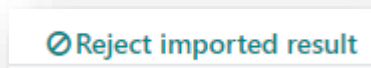
For an imported result to be rejected it:

- cannot have the **DSA**, **OOL**, **Consolidate** or **View in Clinical Portal** check boxes ticked.
- cannot be authorised in the **HLA Typing profile** or **Unacceptable & Acceptable Antigens** profile.

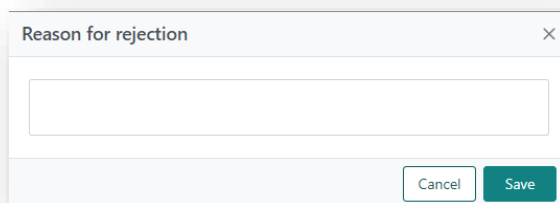
1. Click on the test result to view the details.



2. Click **Reject imported result**.



3. Type in the **Reason for rejection** and click **Save**.



STAGING RECORDS

Records that have failed to successfully upload can be viewed in **Staging**. Each record is held in **Staging** until any errors and issues are resolved. Staging records may be:

- Deleted and edited at source, then reloaded.
- If an orphaned record, when appropriate data is created or uploaded, the orphaned record can then be (re)loaded.
- Confirmed as a duplicate, in which case the duplicate is deleted.

OrganMatch reviews orphan test results for HLA Typing or HLA Antibody screening in Staging, and attempts to match them to a sample record when:

- a new sample record is manually added for a person (Samples & Test Results).
- a new sample record is successfully imported and added to a Person.
- update Sample is selected on a person's existing sample record (regardless of whether any detail has been updated on that sample).
- a person's Demographic and Contact Details are saved (regardless of whether any Demographic and Contact Details has been changed).
- a person record is updated by using the Person Update function from Staging.

Staging - Demographics (Person Update)

Last Name: Brnje | First Name: Grhc Kuawx

Date of Birth data: 19/11/2001 | National Reference

Gender: Male

Error Messages

Field ID	Current Value ID	Error ID
National Reference	P0030106	The field has been changed in the import
Gender	Female	The field has been changed in the import

2 record/s found

Navigation: << < 1 > >> 10

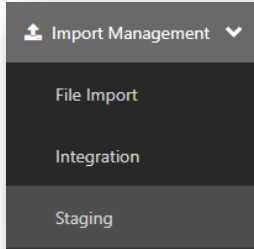
Buttons: Update Person, Delete, Close

Notes:

- When an orphan test result has been matched to a sample the test result is automatically added to the sample.
- After the orphan test result has been successfully added to the sample, OrganMatch will delete that record from Staging.

2.1 ACCESS STAGING RECORDS

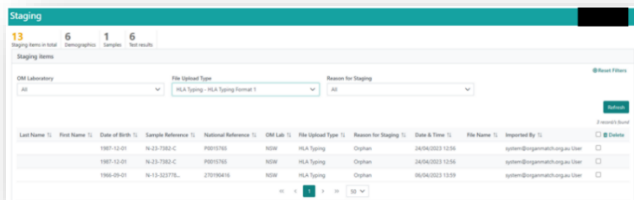
1. Click **Import Management**. Then click **Staging**.



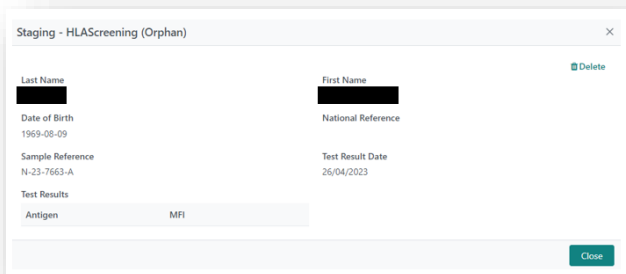
2. A summary of the number of files currently in **Staging** is displayed at the top of the screen.



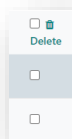
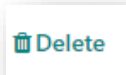
3. A list of files displays in the **Staging items** section under the summary.



4. Click on the file to look at the details.



- Click **Delete** to remove individual files that are open, or bulk delete by clicking the check box next to the record and click **Delete**.



- The below table lists how to address staging records.

Error Message	Troubleshooting Action
Duplicate	<p>If the test result already exists in OrganMatch, the record will be marked as 'duplicate' and placed in Staging for further investigation.</p> <p>Check the file that was imported, delete the record and re-import the correct file if required.</p>
Orphan	<p>If no person record is found matching the record in the file, the record is an 'orphan' and will be placed in Staging for further investigation.</p> <p>If the sample is not in OM, then import the sample or manually add the sample. See 1.2 Import Samples for further details.</p> <p>If the person profile is not in OM, then perform a demographics import or manually add the person.</p> <p>See 1.1 Import Demographics for further details.</p> <p>The orphan HLA typing and antibody records will automatically import once there is a matching person.</p>
Error	<p>If the file or record format is not as expected, it will 'error' and be placed in Staging for further investigation.</p> <p>Delete the record and reimport data in the correct format.</p>
Person Update	<p>If the demographic file is flagged with an 'I' or the National Reference is empty, then OM will check for a match of an existing record. OM will check last name, first name (either Given Name or first word in the Given Name), date of birth and OM lab. If there is a match the record is placed in Staging with the reason Person Update.</p> <p>Click Update Person to update the National Reference, double barreled first name or gender directly from Staging.</p>
Deceased Donor	<p>If a demographic file has patient category of CAD or CADX the record will be placed in Staging with Reason "Deceased Donor".</p> <p>Add the National Reference and Laboratory Reference to the record created through Integration and delete the record from Staging.</p>

DEFINITIONS

Term/abbreviation	Definition
DSA	Donor Specific Antibody
EDR	Electronic Donor Record
OM	OrganMatch
OOL	Organ Offer List
Orphan	A sample for a person record that doesn't exist in OM or a result that doesn't have a sample in OM.
Staging	A software environment in OM that is used to host records that were not successfully imported.
TISNet	The SoftHLA application supporting the Lifeblood Transplantation and Immunogenetics Laboratory Operations.

REFERENCED INTERNAL DOCUMENTS

Document number	Source
OM-042	Deceased Donor Enrolments- Laboratory Portal

CHANGE HISTORY

Version number	Effective date	Summary of change
1	14/03/2023	New document
2	8/08/2023	Sprint 46 update: <ul style="list-style-type: none"> Staging records updated to reflect new trigger of person update for orphan sample management.

3	Refer to footer	<p>Sprint 55 update:</p> <ul style="list-style-type: none"> Importing files section updated to reflect new process of not automatically creating and enrolment when demographics are imported. <p>Other:</p> <ul style="list-style-type: none"> Note added to importing files section regarding UTC format for integration files. Added table for referenced internal documents. Added additional information for integration to the Importing Data section.
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ELECTRONIC SIGNATURE

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