

Tool for RSR Export (T-REX) User's Guide

*For the Ryan White Services Client-Level Data Report
Version 3.3*

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Release History

Version	Date	Description
1.1	August 2009	T-REX
1.11	August 2009	Client Services error fixed. Drop down lists added to RsrClients Access database.
1.14	August 2009	Client URN column added to the ClientReport Table.
2.0	December 2009	Support for SQL Server added.
3.0	September 2010	Additional directions re: extracting zip files and data validation queries added. Appendix A: XML/Access import.
3.1	March 2011	Directions: Added, moved, and simplified information, with emphasis on the extraction and XML creation processes. Added section on removing Access passwords.
3.2	April 2011	Updated section 2A Import XML directions to use RsrClientImport.mdb instead of starting with a blank database.
3.3	January 2012	Added section on merging duplicate records, and updated instructions to include reporting year validation.

1. About the Tool for RSR Export (T-REX)

The Ryan White Services Reporting System (RSR) requires that grantees and providers submit de-identified client-level demographic, service, and clinical data. Rather than filling out a client-level report for the RSR, the client-level data are provided as an electronic file, with a record for each client. You must upload these data to the HAB server in a specific XML (eXtensible Markup Language) format. XML is a simple and widely adopted method of formatting data so that it can be exchanged across different computer platforms, languages, and applications.

T-REX: Definition

“T-REX” is a Tool for RSR Export created to assist grantees currently not using CAREWare, a Provider Data Import (PDI), or other RSR-compliant vendors in the conversion of their Client-Level Data into an XML Format.

Purposes

The primary purposes of the *Tool for RSR Export (T-REX)* are to:

1. Convert your Client-Level Data into XML format that meets the requirements for the RSR.
2. Serve as a template for you to develop your own data extraction and/or XML conversion tools.
3. Take your RSR XML file import and translate it for viewing in the Access Tables

About the User Manual

This user manual is specifically for grantees seeking to convert their Client-Level Data into XML format for submittal to HAB, and assumes that the grantee staff person(s) using *T-REX* are familiar with or have facility with the following software, including accessing and modifying files:

- Microsoft Access or Microsoft SQL Server
- Microsoft Excel

This user manual is not written for programmers and assumes that programmers using T-REX are equipped and prepared to modify the files to fit their needs, without the aid of a user manual.

As an option, this user manual also provides instructions for users who use SQL Server.

Other Resources/ Documents

The following documents are available for Grantee reference and use during the RSR reporting process, from data collection to data reporting.

- *RSR Client-Level Data Elements*: This document should be used in conjunction with the RSR Client-Level Data Elements document, which describes the rationale for collecting the client-level data elements. The RSR Client-Level Data Elements document is available at <http://careacttarget.org/library/rsr/datafields.pdf>
- *RSR Instructions*: The RSR Instructions document contains detailed information needed for completing the RSR reports. This document may be cross-referenced with the section, Client-Level Data Fields, in the RSR Instructions document. The RSR

Instructions document is available at
http://careacttarget.org/library/RSR_Instruction_Manual.pdf

- The Instruction Manual Supplement is available at: http://careacttarget.org/library/RSR-Supplement_color_11-11-09_%28508%20compliant%29.pdf
- *RSR CLD Dictionary and XML Schema Implementation Guide* RSR Client-Level Data Dictionary, Version 2.0
http://careacttarget.org/library/RSR_Client_Level_Data_Dictionary.pdf.

2. System Requirements

To run **T-REX**, you will need the following programs:

- Windows XP or higher
- An archiving tool such as WinZip or 7-zip to extract the .zip files (free):
 - **Note: If you have Windows 7 or Window Vista, you don't need this.**
 - WinZip: <http://download.winzip.com/winzip150.exe>
 - 7-Zip: <http://downloads.sourceforge.net/sevenzzip/7z920.exe>
- Microsoft .Net 2.0 Framework. Available free at
<http://www.microsoft.com/downloads/details.aspx?FamilyID=0856EACB-4362-4B0D-8EDD-AAB15C5E04F5&displaylang=en>

The following is applicable to programmers only:

To modify or debug **T-REX**, you will need **Microsoft Visual Studio 2008** or **Microsoft Visual Basic 2008 Express Edition**. Microsoft Visual Studio 2008 Express Edition can be downloaded for free from <http://www.microsoft.com/exPress/download/>. The file you need to open with Microsoft Visual Studio is called "**RsrXmlGenerator.sln**".

3. Installing T-REX

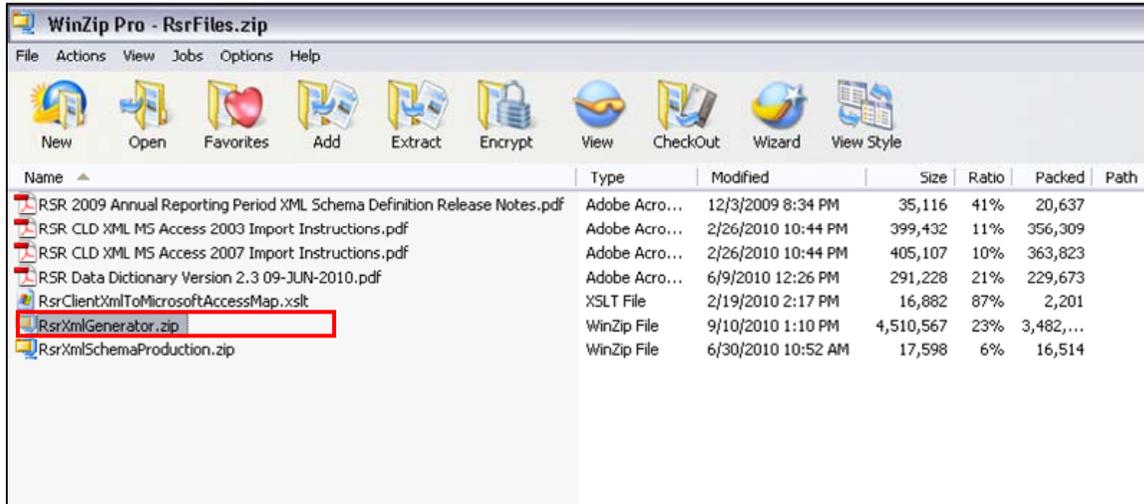
Note

As you update your Client-Level Data frequently, you will need to follow the steps below **each time** you wish to upload a **new set** of Client-Level Data for reporting. The steps describe how to import data into the provided Access files for XML conversion.

Each time prior to importing data into the Access file, you must **rename and save** the file on your computer or server. Detailed instructions are provided below. The Access files **are not** saved to HAB's servers. As such, HAB cannot retrieve these files for you if you lose them.

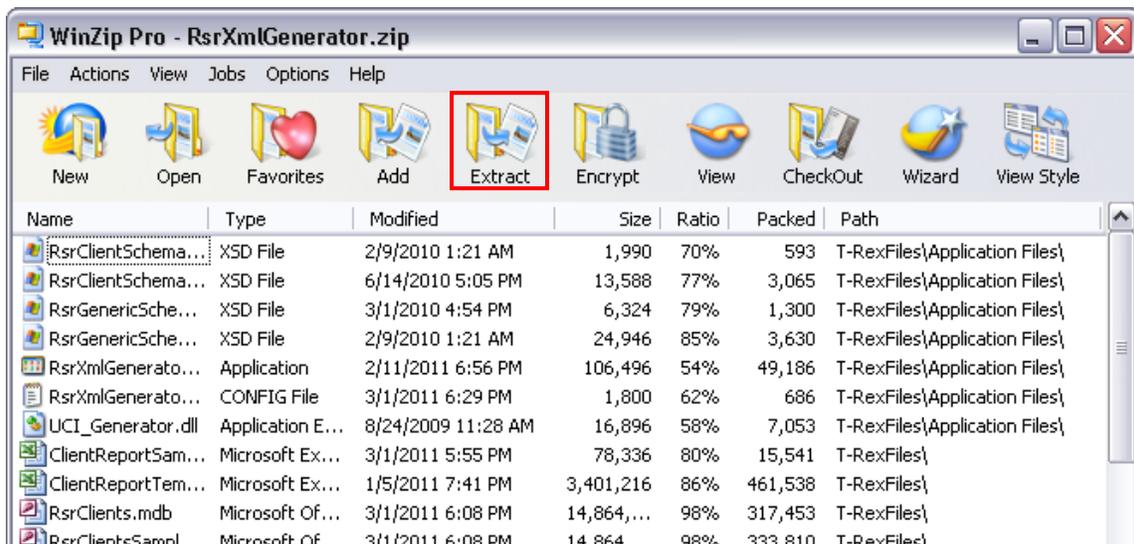
- You will receive the T-REX files as a zip file from either a technical assistance representative via email or via an FTP site (a File Transfer Protocol site, where you log in and download the zip file) depending on what your system allows. A zip file is a compressed file that contains multiple files within it.

- When you receive/download the RsrFiles.zip, double click on the file to open it and then locate and open the **T-RexFiles.zip** file.
- **For Windows 7 or Vista Users:** If you have Winzip (you would see the screen below), continue with the directions normally. If the .zip file appears to open in a normal folder window, it is actually still a compressed file. Copy (drag & drop) all of these files to C:\T-RexFiles and skip to Step 4.

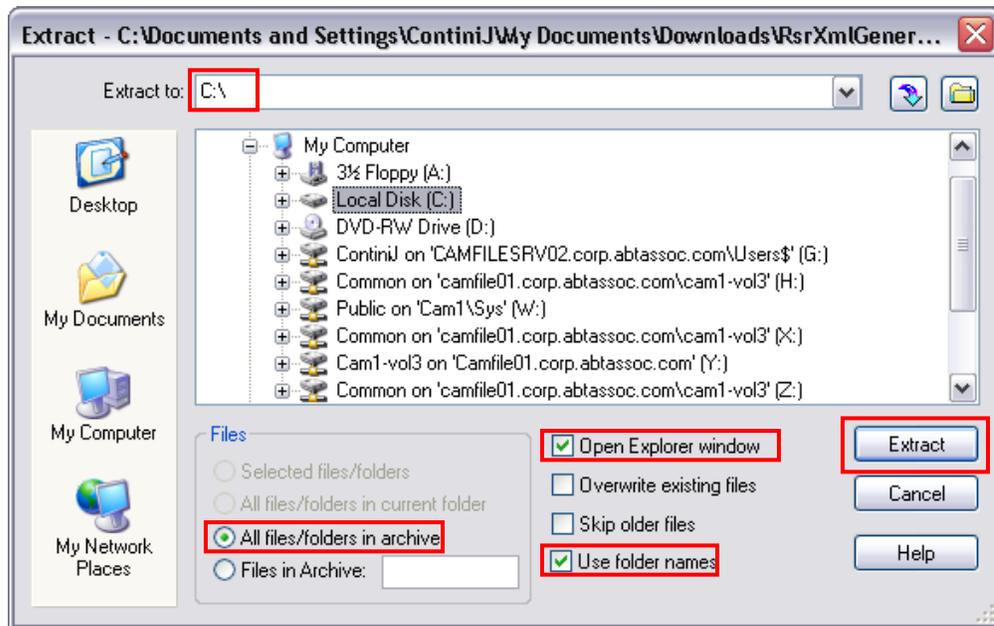


- Extract the zip files into the location of your choice. Ensure that no files are selected, or Winzip will try to export only those files.

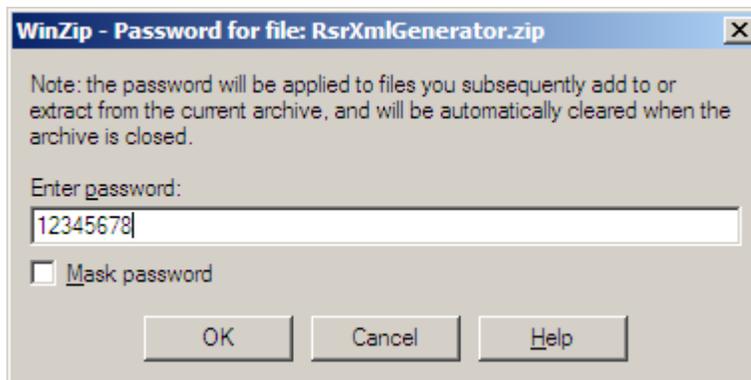
Note: The archive will automatically extract to a 'T-RexFiles' folder. We recommend that you extract to the C:\ Drive.



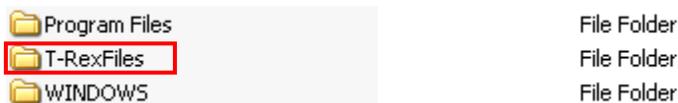
- When the Extract window appears, ensure that the following options are checked and that you have entered the correct path into 'Extract to'. Then, click **Extract**.



- If you are asked for a password, the password is **12345678**. This password is not for security purposes, but to prevent email spam filters from altering the zip file.



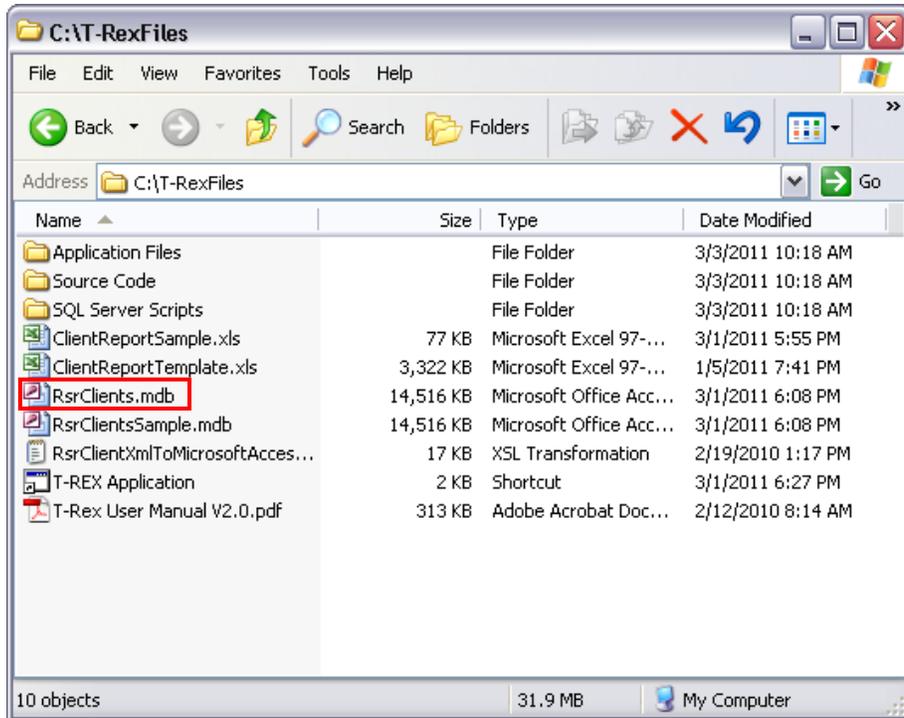
- Once extraction is completed, you should see the folder window appear with your C:\ Drive. Double-click the T-RexFiles folder to open it. You can create a shortcut to this folder by right clicking and selecting Send to->Desktop (shortcut) for later easy access.



- Note: If all you see is a T-RexFiles folder, double-click that and continue the instructions as normal.

- The folder contents should appear as they do in the screenshot below.

Note: Your computer may not be set to show extensions, so you may see only 'RsrClients' instead of 'RsrClients.mdb'. This is not a problem and you can continue normally.



- The file that we will be copying the data from Excel into is the **RsrClients.mdb** file, which is a Microsoft Access database. Double-click it to open Access, and continue with the instructions in Step 4.

4. Loading the MS Access Database

There are multiple ways to import data. For those who are not familiar with Access programming, the following instructions present a **basic approach** for grantees working with Client-Level Data from any spreadsheet.

- **We are providing instructions for both Access 2003 and Access 2007.**
- **To complete the following steps, you will need your source datasheet which should be in Excel.**

This approach involves exporting the RSR-required data elements from your system into an Excel spreadsheet and then copying and pasting the data from the Excel spreadsheet into the T-REX Access tables.

The sheet names in Excel should match up with the Access Table names that you will see in the instructions below.

Those who are familiar with Access programming may choose to create scripts to extract data from their current database into the correct categories in an access database. Creating Access scripts is not covered in this manual.

You must refer to the data dictionary as you go along to ensure you are loading the correct information. The data dictionary is located here:

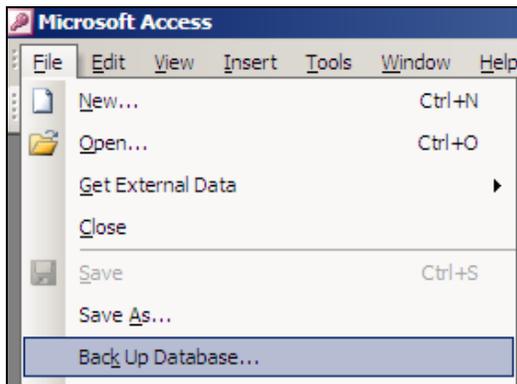
http://careacttarget.org/library/RSR_Client_Level_Data_Dictionary.pdf.

To load the database, double-click file name **RsrClients.mdb** in the T-RexFiles folder. This will open Microsoft Access. Then, follow the steps on the next page.

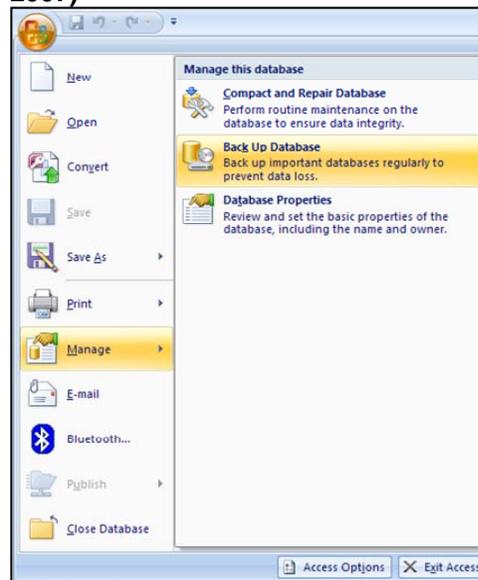
Note: If your database is password protected, remove the password by following the steps in Section 11 before continuing.

- 1) Back up the database by clicking:

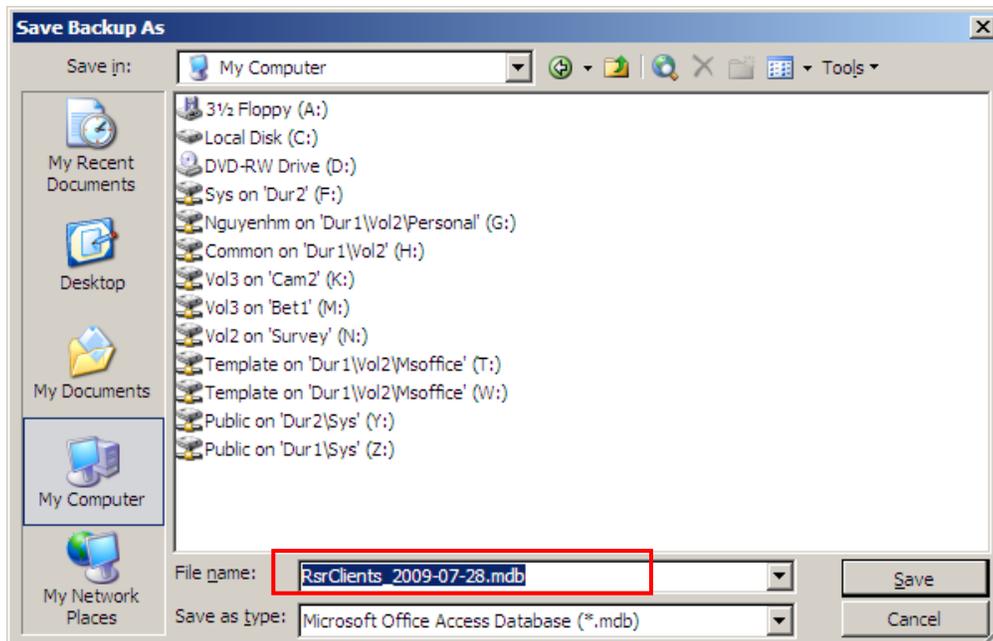
File > Back Up Database (Access 2003)



File > Manage > Back Up Database (Access 2007)



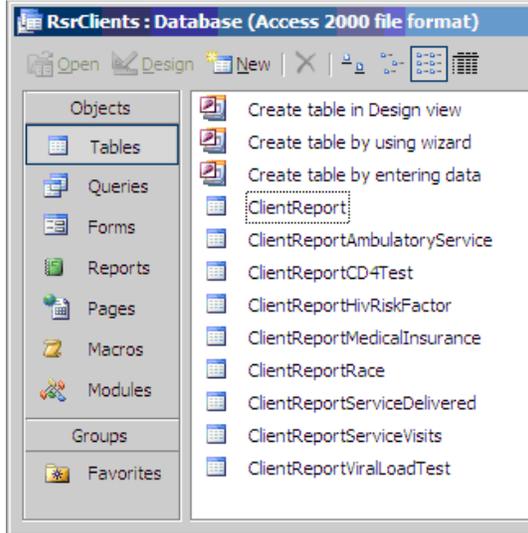
- 2) Save the copy to the location of your choice. We suggest keeping all your copies in a single location. Note that the automatically produced file name will contain the date of the backup. This will help you identify datasets in the future.



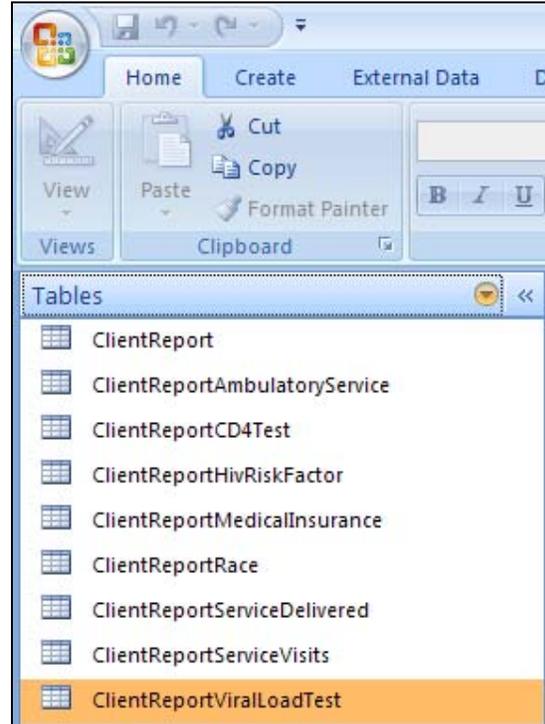
- 3) Once the backup copy has been saved, go back to the folder window and double-click the new file with today's date to open that copy. This way, you will be working with the backup, leaving the original intact.

4) You will see a list of compiled Client-Level Data tables:

Access 2003



Access 2007



5) Double-clicking on a table name will show you the contents of the table:

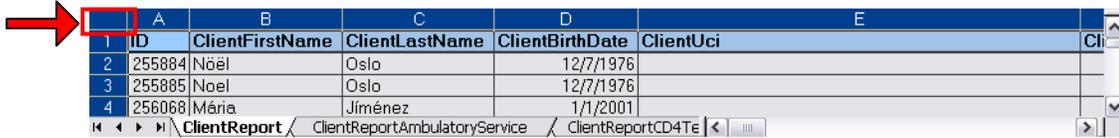


6) The table contains **elements** and **values**.

- **Elements**, as shown above, are variables that categorize the data you will submit. They appear in gray in the first row. In this example, the elements are *ID*, *ReportPeriodID*, *ClientFirstName*, etc.
- **Values** refers to the data you input into each element or variable. For example, for element "ClientFirstName", you can input the **value** "John" or "Jane". Each element can have multiple values. In some cases, the Data Dictionary specifies the structure of the values. An example is noted regarding the client services delivered table. You will find more information in Section 10.

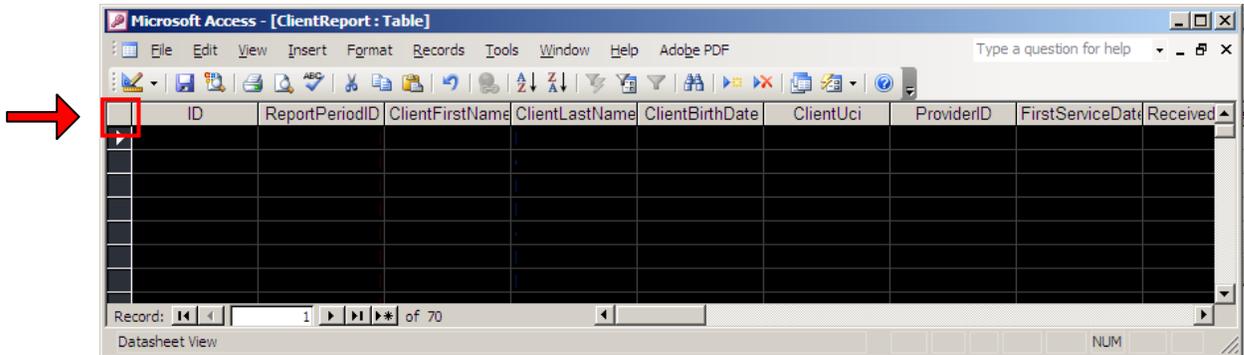
For more information on data elements and values, visit the data academy and review the module "Getting Data from Existing Sources" at: <http://www.careacttarget.org/dataacademy/>

- 7) **You will input values into the elements.** You will cut and paste the values from your source spreadsheet into the table. Before you can copy and paste the values, make sure that the first row of the spreadsheet, the elements, matches the order of the first row of the Access table.
- 8) Select all sells by pressing CTRL+A (Select All) or by clicking the upper-left square in Excel.



	A	B	C	D	E
1	ID	ClientFirstName	ClientLastName	ClientBirthDate	ClientUci
2	255884	Nöel	Oslo	12/7/1976	
3	255885	Noel	Oslo	12/7/1976	
4	256068	Mária	Jiménez	1/1/2001	

- 9) In Excel, copy your source spreadsheet pressing CTRL+C or going to Edit>Copy.
- 10) Now on the Access table, click on the square in the upper-left corner below the menu bars to highlight the entire page:



	ID	ReportPeriodID	ClientFirstName	ClientLastName	ClientBirthDate	ClientUci	ProviderID	FirstServiceDate	Received

- 11) **Paste** the data (CTRL+V or Edit>Paste) into the table.

12) Data is automatically saved in the Access database when it is entered (Click Yes to continue with the paste operations pop-ups if any).

13) Repeat this process for each of the 9 ClientReport tables. These are the table names:

	ClientReport
	ClientReportAmbulatoryService
	ClientReportCD4Test
	ClientReportHivRiskFactor
	ClientReportMedicalInsurance
	ClientReportRace
	ClientReportServiceDelivered
	ClientReportServiceVisits
	ClientReportViralLoadTest

- **Note:** For the **ClientReportServicesDelivered** table, indicate whether a service was delivered with the following values in the column or element called *DeliveredID*:

1 = Service Not Delivered
2 = Service Delivered
3 = Unknown

If you enter only delivered services into **ClientReportServicesDelivered**, you must still enter in a value of "2" (e.g. Service Delivered) in the *DeliveredID* column or element. If you do not do so, the service will not be recognized as delivered.

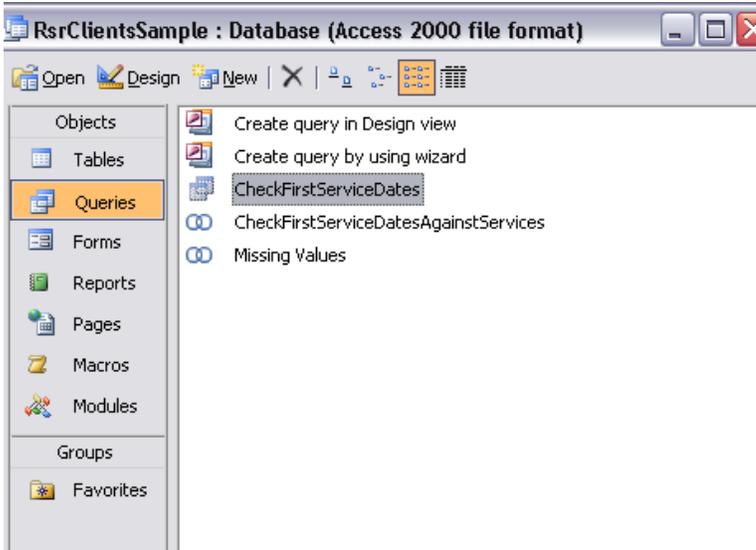
- Once you have completed the cut and paste process for your Client-Level Data, you will then begin converting the data into XML format for submittal to HAB.
-

5. Validating Data

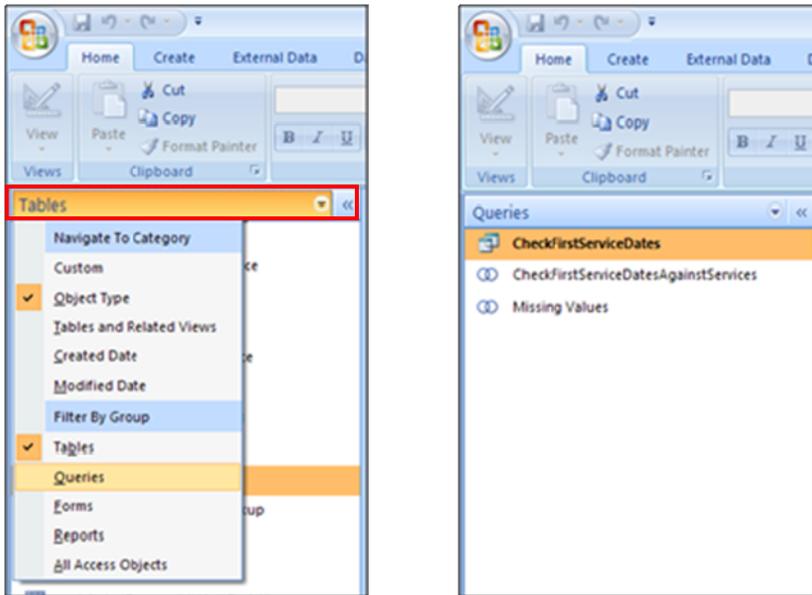
The following three queries were created within Access to search for inconsistent and missing data:

- Check First Service Dates
- Check First Service Dates Against Services
- Missing Values

Access 2003



Access 2007



- Double-clicking on the query name will show you the contents of each query.

CheckFirstServiceDates: The purpose of this query is to ensure that the ambulatory service was provided AFTER the client's first service date.

ID	ClientUrn	ClientUci	ClientFirstName	ClientLastName	FirstServiceDate	ServiceDate
255885		64F40D09B4FE1C733826415007B25B08E3E7C4E2U	Noel	Oslo	12/31/2010	1/1/2008
255885		64F40D09B4FE1C733826415007B25B08E3E7C4E2U	Noel	Oslo	12/31/2010	2/1/2008

- The query compares the “ServiceDate” value in the ClientReportAmbulatoryService table to the “FirstServiceDate” value in the ClientReport table.
- Review and edit the values in these two tables as required and re-run query to ensure accuracy of the data.

CheckFirstServiceDatesAgainstServices: The purpose of this query is to ensure that services were provided AFTER the client's first service date. Please note the corresponding dates for “QuarterID” values: 1 = 3/31/09, 2 = 6/30/09, 3 = 9/30/09, 4 = 12/31/09.

ID	ClientUrn	ClientUci	ClientFirstName	ClientLastName	FirstServiceDate	QuarterID
255885		64F40D09B4FE	Noel	Oslo	12/31/2010	1

- The query compares the “QuarterID” values in the ClientReportSevicesVisit table AND the ClientReportServiceDelivered table to the “FirstServiceDate” value in the ClientReport table.
- Review and edit the values in these three tables as required and re-run query to ensure accuracy of the data.

MissingValues: If a client received service 8, ALL data elements must be reported for this client. The purpose of this query is to ensure that all required data is captured in the ClientReport table.

ID	Client	Issue
255884	64F40D09B4FE1C733826415007B25B08E3E7C4E2U	Missing Enrollment Status
255884	64F40D09B4FE1C733826415007B25B08E3E7C4E2U	Missing First Service Date
255884	64F40D09B4FE1C733826415007B25B08E3E7C4E2U	Missing Medical Insurance
255884	64F40D09B4FE1C733826415007B25B08E3E7C4E2U	Missing Poverty Level
255884	64F40D09B4FE1C733826415007B25B08E3E7C4E2U	Missing Prescribed HAART
255884	64F40D09B4FE1C733826415007B25B08E3E7C4E2U	Missing Prescribed PCP Prophylaxis
255884	64F40D09B4FE1C733826415007B25B08E3E7C4E2U	Missing Risk Screening Provided
255884	64F40D09B4FE1C733826415007B25B08E3E7C4E2U	Missing Screened Hepatitis B
255884	64F40D09B4FE1C733826415007B25B08E3E7C4E2U	Missing Screened Hepatitis C
255884	64F40D09B4FE1C733826415007B25B08E3E7C4E2U	Missing Screened Mental Health
255884	64F40D09B4FE1C733826415007B25B08E3E7C4E2U	Missing Screened Substance Abuse
255884	64F40D09B4FE1C733826415007B25B08E3E7C4E2U	Missing Screened Syphilis
255884	64F40D09B4FE1C733826415007B25B08E3E7C4E2U	Missing Screened TB
255884	64F40D09B4FE1C733826415007B25B08E3E7C4E2U	Missing Vaccinated Hepatitis B
256068	1C5E98E89427C05B69AC0A03664F7FC50A0E764CU	Missing Services
256069	1C5E98E89427C05B69AC0A03664F7FC50A0E764CU	Missing Services
256070	AE523FF5D9991AD10B57484CA94F35F812DB67D8U	Missing Services
256071	9367B83D52ADF00818B73CB53B2916A105C0F8AEU	Missing Services
256072	RÚGÜ0101571U	Missing Services
256073	Imal, Imal	Missing Services
256074	Joe, Joe	Missing Services
256075	Kevin, Kevin	Missing Services
256076	Larry, Larry	Missing Services
256077	C4164E7C4617DF12159F3B03A50A5A8920C72E68U	Missing Services
256078	C2A2B121414B387D62D2E7198CFC58EBCD3E7F35U	Missing Services

- The query cycles through all of the tables and reports missing information.
- Unless you receive one of the following messages, all of the “Issues” can be addressed directly in the ClientReport table:
 - “Missing Race”: Refer to the ClientReportRace and ClientReport tables
 - “Missing HIV Risk Factor”: Refer to ClientReportHivRiskFactor and ClientReport tables
 - “Missing Services”: Refer to the ClientReportServiceVisits, ClientReportServiceDelivered, and ClientReport tables
 - “Missing Ambulatory Services”: Refer to the ClientReportAmbulatoryService and ClientReport tables
 - “Missing CD4 Test Results”: Refer to the ClientReportCD4Test and ClientReport tables
 - “Missing Viral Load Results”: Refer to the ClientReportViralLoadTest and ClientReport tables

Review and edit the values in the appropriate table(s) as required and re-run query to ensure accuracy of the data.

Please refer to the data dictionary if you have any questions about the reporting requirements. http://careacttarget.org/library/RSR_Client_Level_Data_Dictionary.pdf.

If you want to see what your XML file data will look like when it is uploaded, you can view it in the T-REX Access Tables. Go to Section 2 for instructions on how to import your RSR XML file into T-Rex.

6. Tips on Saving Data Files

- **Use RSRClients.mdb as a template.** Do not work directly in the file called **RSRClients.mdb**. You want to make a copy of it and use that for the steps. Each time you seek to convert a new cycle of data to XML format, create a copy of RSRClients.mdb with the identifying date (e.g. RSRClients_Date.mdb). This way, you can keep track of the datasets you are converting and reference them when necessary.

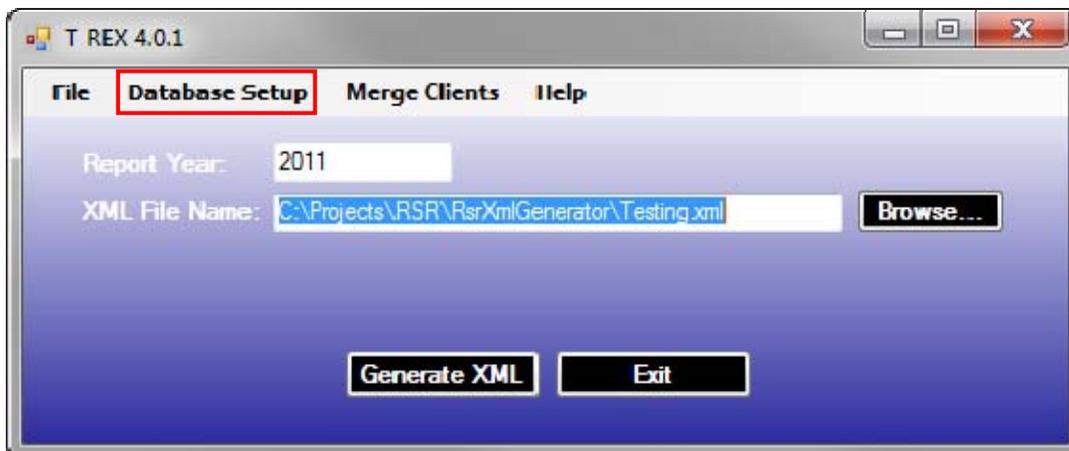
We do this by right-clicking the file name, clicking “Copy”, and then right-clicking in the whitespace (eg. Not on the file name, but in the same folder window) and selecting “Paste”. This will create a copy. Click on the newly copied file (it will be called “Copy of RSRClients.mdb”). Rename this to “RSRClients_DATE.mdb”, with the date in for format of YYYY_MM_DD (eg. 2001_02_23 for 02/23/2011). This is because file names cannot have slashes.

- **Create a database file for each provider.** Make a copy of **RSRClients.mdb** for each provider. Use an easy naming convention such as “*ProviderName_Date.mdb*” to keep track of the data you are uploading.

7. Converting Access Data to XML

The XML Convertor is located in `\RsrXmlGenerator\RsrXmlGenerator\bin\Debug`. The file name you are seeking in this folder is called **RsrXmlGenerator.exe**.

- Go to `\RsrXmlGenerator\RsrXmlGenerator\bin\Debug`
- Double-click the file called **RsrXmlGenerator.exe**. You should see the following screen:



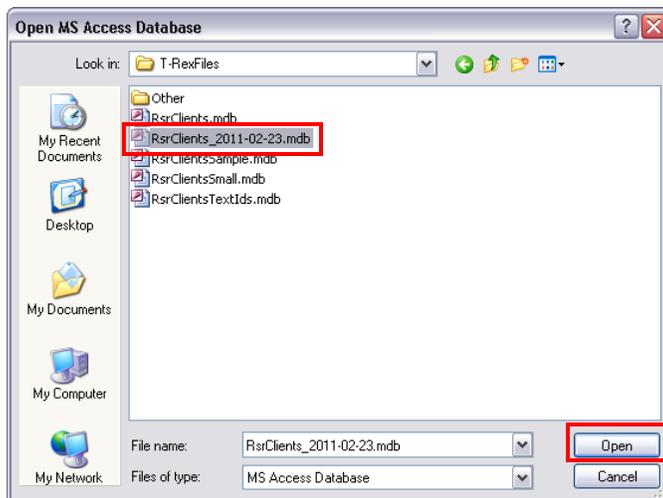
Note: For first time use, you should click on the ‘Database Setup’ Menu Option.

Setting up for the first time

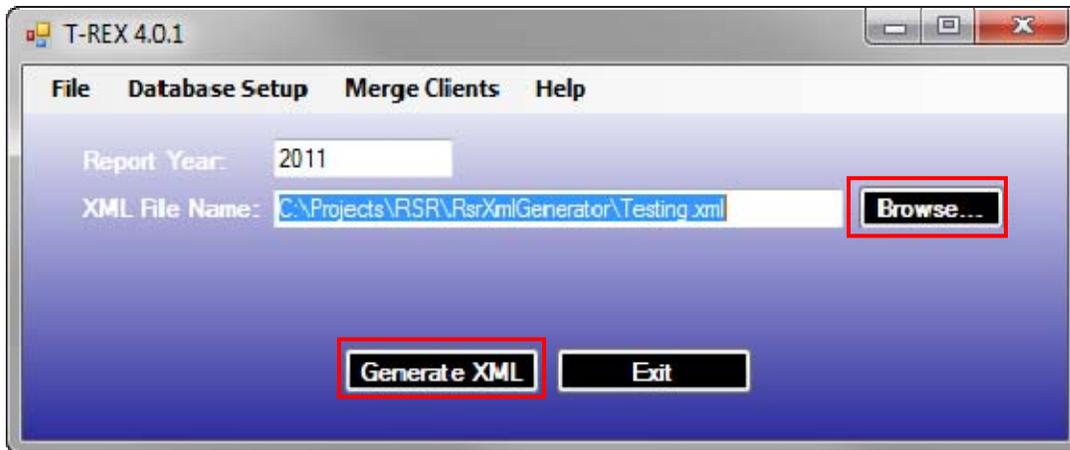
1. Click the Database Setup menu item. Then select MS Access from the drop down list, regardless of which version of Access you used.



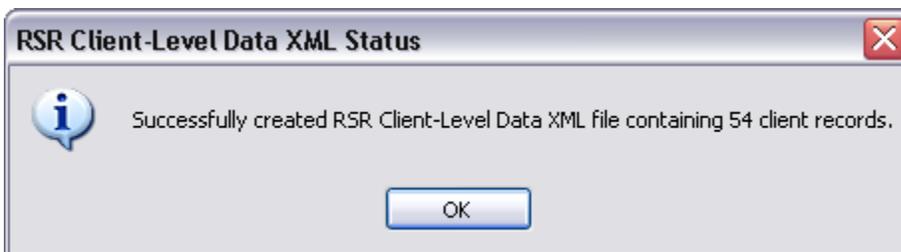
2. Click "Browse..." and browse to the backup file that you created and pasted the information into from Step 4. It is quickest to do this by clicking "My Computer" > (C:) > T-RexFiles. Once you select the file, click open.



3. Once the file is selected, click Close to return to the main T-REX screen where you will create the XML file.
4. When you are back at the below screen, you can type in any path to export the XML file to (such as the one below). You can also click Browse to find an already existing XML file to be overwritten, such as the one in the path below. (Note: it will overwrite without prompting)



- Ensure that the reporting year is entered correctly as well. This is used in validation to ensure that only services delivered during the reporting period are included in the XML output.
- Once the XML File Name path is entered, click the “Generate XML button”.
- You should then see a confirmation message:



Note: If you receive the following error, you did not specify your database file correctly in the Database Setup:

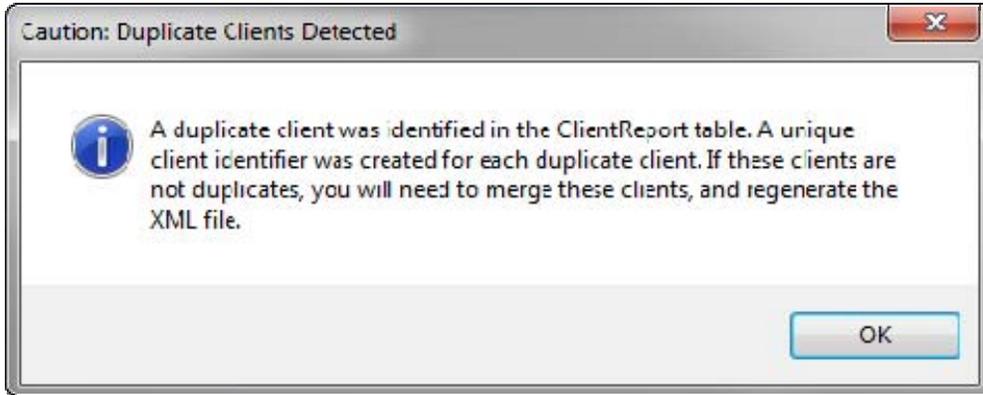


If this happens, go back to Database Setup and be sure to choose the .mdb file that you pasted all of the information from Excel into. If you receive a different error, be sure that you ran the 3 queries to ensure that all of your data was entered properly and valid, fix any errors and try this step again.

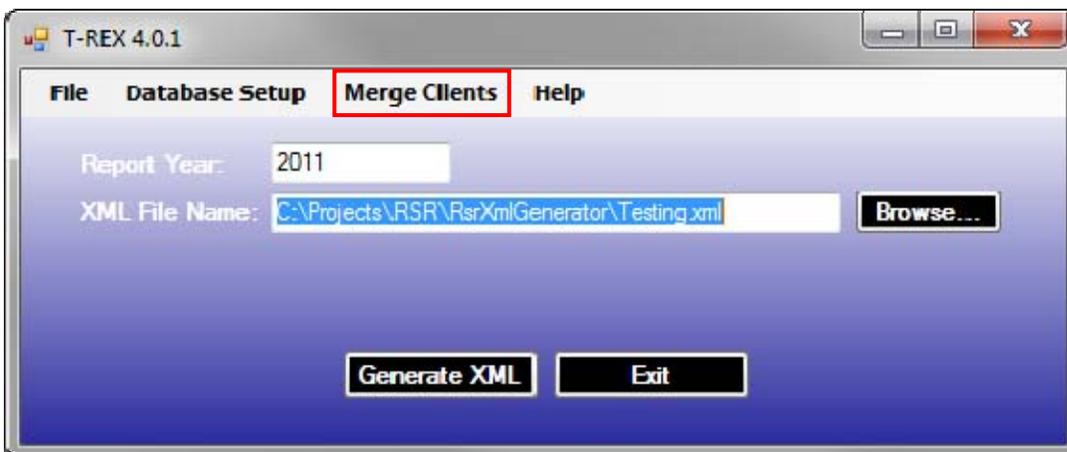
If you received a notice indicating that there duplicate clients were detected, see the next section on **Merging Clients**.

Merging Clients

After you click Generate XML, T-REX will check to see if there are duplicate clients, and give you the opportunity to merge them. If there are duplicates, you will see the following pop-up.



Click OK, and then Click OK on the success screen. Now back in the main window, click on **Merge Clients**.



This will bring up a large window with the first Primary and Secondary client duplicate detected.

You will see the headers to the left of the window, two columns for the Primary and Secondary clients (which are duplicates), and finally the last column shows what the record will look like once merged.

The duplicates should already be selected, but you may do so if they are not. If you have multiple duplicates, you would do the following step for each of those by selecting the second set of primary and secondary clients.

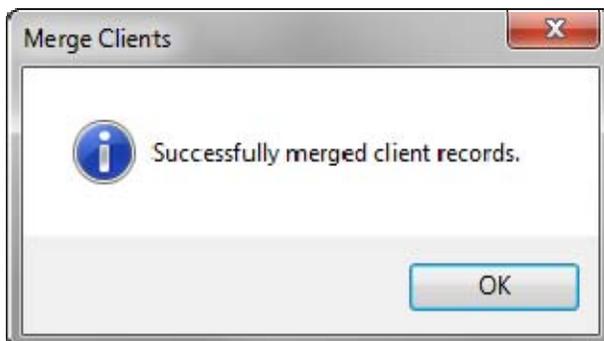
If the primary and secondary clients are not duplicates and should have their own separate records, then do not merge them. This might happen if you have two unique patients with the same name.

With the duplicates selected in Primary and Secondary Clients, Click **“Apply Default Merge Rules”** to T-REX to populate the checkboxes in the default way of merging. Once clicked, review the data on the right-hand side to ensure that the **Merged Client** record is accurate. If T-REX selected the wrong checkbox (eg. Wrong status, dates, etc), then check the appropriate checkbox to ensure that the final XML document includes the correct record.

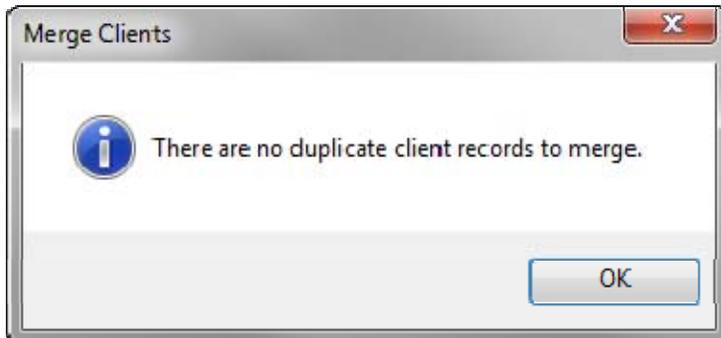
When you are finished with that record and the way the Merged Client will be recorded, click the **Merge Clients** button.

	Primary Client	Secondary Client	Merged Client
AIDS Diagnosis Year:	<input type="checkbox"/> 2001	<input checked="" type="checkbox"/> 2001	2001
Death Date:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Enrollment Status:	<input type="checkbox"/> 2: Referred to another program or services, or became	<input type="checkbox"/> 2: Referred to another program or services, or became	2: Referred to another program or services, c
Ethnicity:	<input type="checkbox"/> 2: Non-Hispanic	<input checked="" type="checkbox"/> 2: Non-Hispanic	2: Non-Hispanic
First Ambulatory Care Date:	<input type="checkbox"/> May 17, 2008	<input checked="" type="checkbox"/> May 17, 2008	May 17, 2008
First Service Date:	<input type="checkbox"/> May 17, 2008	<input checked="" type="checkbox"/> May 17, 2008	May 17, 2008
Geographic Unit Code:	<input checked="" type="checkbox"/> 255	<input type="checkbox"/> 255	255
HIV/AIDS Status:	<input type="checkbox"/> 4: CDC-defined AIDS	<input checked="" type="checkbox"/> 4: CDC-defined AIDS	4: CDC-defined AIDS
Housing Status:	<input type="checkbox"/> 3: Unstable	<input checked="" type="checkbox"/> 3: Unstable	3: Unstable
Poverty Level:	<input type="checkbox"/> 2: 101-200% of the Federal poverty level	<input checked="" type="checkbox"/> 2: 101-200% of the Federal poverty level	2: 101-200% of the Federal poverty level
Pregnant:	<input type="checkbox"/> 1: Yes	<input checked="" type="checkbox"/> 1: Yes	1: Yes
Prenatal Care:	<input type="checkbox"/> 5: Not applicable	<input checked="" type="checkbox"/> 5: Not applicable	5: Not applicable
Prescribed ARV Medication:	<input type="checkbox"/> 3: Not applicable	<input checked="" type="checkbox"/> 3: Not applicable	3: Not applicable
Prescribed HAART:	<input type="checkbox"/> 1: Yes	<input checked="" type="checkbox"/> 1: Yes	1: Yes
Prescribed PCP Prophylaxis:	<input type="checkbox"/> 1: No	<input checked="" type="checkbox"/> 1: No	1: No
Received Cervical Pap Smear:	<input type="checkbox"/> 1: No	<input checked="" type="checkbox"/> 1: No	1: No
Risk Screening Provided:	<input type="checkbox"/> 2: Yes	<input checked="" type="checkbox"/> 2: Yes	2: Yes
Screened Hepatitis B:	<input type="checkbox"/> 1: No	<input checked="" type="checkbox"/> 1: No	1: No
Screened Hepatitis B Since HIV Diagnosis:	<input type="checkbox"/> 1: No	<input checked="" type="checkbox"/> 1: No	1: No
Screened Hepatitis C:	<input type="checkbox"/> 1: No	<input checked="" type="checkbox"/> 1: No	1: No
Screened Hepatitis C Since HIV Diagnosis:	<input type="checkbox"/> 1: No	<input checked="" type="checkbox"/> 1: No	1: No
Screened Mental Health:	<input type="checkbox"/> 1: No	<input checked="" type="checkbox"/> 1: No	1: No
Screened Substance Abuse:	<input type="checkbox"/> 1: No	<input checked="" type="checkbox"/> 1: No	1: No
Screened Syphilis:	<input type="checkbox"/> 1: No	<input checked="" type="checkbox"/> 1: No	1: No
Screened TB:	<input type="checkbox"/> 1: No	<input checked="" type="checkbox"/> 1: No	1: No
Screened TB Since HIV Diagnosis:	<input checked="" type="checkbox"/> 1: No	<input type="checkbox"/> 1: No	1: No
Transgender:	<input type="checkbox"/> :	<input checked="" type="checkbox"/> :	:
Vaccinated Hepatitis B:	<input type="checkbox"/> 1: No	<input checked="" type="checkbox"/> 1: No	1: No

Once the clients have been merged, you should receive a confirmation message.

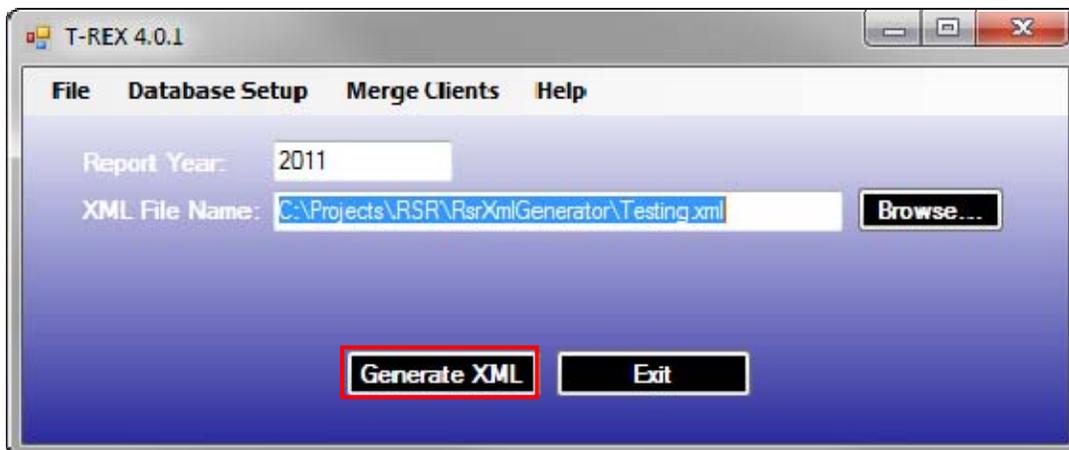


Click OK to the confirmation message, and then click Close in the Merge Clients window. Before moving forward, click Merge Clients in the menu again to ensure that there is not another set of duplicates. You should see the following message:

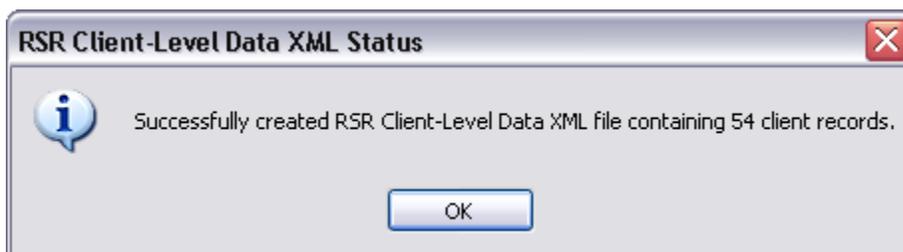


Until you see this message, continue to merge clients until all duplicates are merged (unless two records are meant to be separate as they are different individuals).

When there are no more duplicates, click **Generate XML** in the main window to update the XML file with the merged clients.



You should again receive the confirmation message with a slightly smaller amount of records. The XML generation is now complete.



8. Creating the eUCI

T-REX will use the value in the ClientUci column if it is provided in the ClientReport table. If the ClientUci is not provided for a client and the ClientUrn is provided, then T-REX will use this value to generate the eUCI. If neither the ClientUci or ClientUrn is provided then T-REX will use the client's first name; last name; date of birth and gender code to create the UCI and subsequent eUCI.

If the eUCI is to be generated from the component parts and to ensure data quality and limited errors, make sure none of the following eUCI components begin or end with blanks or special characters:

- First name
- Last name
- Data of birth
- Gender code

The eUCI is generated using the file named UCI_Generator.dll. This file is linked into the program. The input values are read from the ClientReport database and the ClientUci is added to the XML file.

For more information on the eUCI, see "Guidelines for Creating the eUCI"
http://www.careacttarget.org/library/Guidelines_for_Creating_the_eUCI.pdf

9. When Your Variables Do Not Match the RSR Elements

Consult the RSR Data Dictionary for details on the proper formatting of data and transactions.
http://careacttarget.org/library/RSR_Client_Level_Data_Dictionary.pdf

For frequently asked questions regarding RSR elements and data submittal, see
<http://careacttarget.org/rsr.asp>

If you need more information about data variables, you will find it in the Data Academy module "Getting Data from Existing Sources" at <http://www.careacttarget.org/dataacademy/>

10. Database Configuration for connecting to a remote SQL Server

These steps are only intended for those who choose to connect to a remote server rather than using their own Access database files. Before you can generate the RSR Client-Level Data XML file, you must configure your database for first time use through the Database Setup page. Once this step has been completed, you do not need to repeat it unless your database information has changed.

- **Main Menu**
 - *Exit* does just that, it exits the application.
 - *Database Setup* displays a form for configuring the database information.

- **Main Form**

- *File Name* is where the name and location of the RSR client-level data XML file will be created.
- *Browse* allows you to search for a path and specify the name of the RSR client-level data XML file.
- *Generate XML* starts the process to create the RSR client-level data XML file.
- *Exit* exits the application.



- **Setup Form**

- *Database Type* is used to specify either a Microsoft Access or Microsoft SQL Server database. Depending on which type of those two databases you choose to use, the following items will be displayed.
- *Database Server* is the name of the machine where your SQL Server database is installed that has the RSR client-level data tables.
- *Database Name* is the name of the database where your SQL Server tables are installed.
- *Access Mode* determines if you are connecting to the SQL Server database using a user name and password (Normal mode) or using Windows Authentication (Integrated Security mode).
- You must enter the *User Name* if Normal Access Mode is selected. The User Name must be a valid database user.
- You must enter the *Password* if Normal Access Mode is selected. The Password must be a valid password for the provided User Name.
- You can use the *Test Connection* to test the connection to your database using the values provided on the form.
- Click on *Save* to save the values on the form to the applications configuration file so that they will be available the next time you use the application.
- Click on *Close* to close the Setup form.

- **Sample Database Configuration**

- *Create SQL Server Sample Tables* is an SQL script to create the sample RSR client-level data tables used by T-REX to generate the RSR client-level data XML files. The tables are created in the “dbo” schema within SQL Server.
- *Empty SQL Server Sample Tables* is an SQL script that will empty the sample data from the RSR client-level data tables without removing the tables themselves.
- *Drop SQL Server Sample Tables* is an SQL script that will delete the database objects created with the Create SQL Server Tables script.

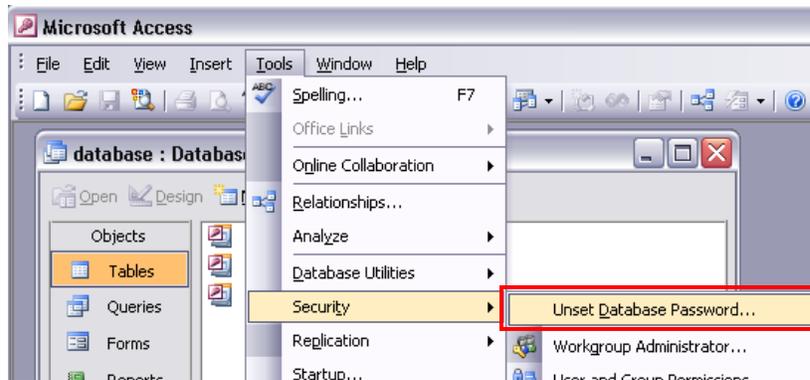
11. Removing Password from Access Database

If the database you are working with is password protected, you will need to remove password protection before using T-Rex. You can do this by following the steps below.

1. Start Access, and open the file exclusively by browsing to the file, and then clicking 'Open Exclusive' from the drop down arrow next to Open. Pressing **Ctrl-O** will open the open file dialog. Enter your password and click OK.



2.
 - a. In **Access 2003**, go to Tools → Security → Unset Database Password



- b. In **Access 2007**, click tab Database Tools → Unset Database Password



3. You will be prompted with a dialog box. Type in the password and click OK.

The database no longer has a password set. T-Rex should now be able to process your database and export to XML.

12. Getting Additional Support

SAIC (Original Developer of T-REX)

Michael Dols

Michael.J.Dols@saic.com

Sphere/Abt Contact

RSR.TA@sphereinstitute.org

For questions related to the content or submission of the RSR:

ryanwhitedatasupport.wrma@csrincorporated.com

Please also reference the Target Center website at: <http://www.careacttarget.org>.

Section 2A: Client-Level Data (CLD) XML File Microsoft Access 2003 Import Instructions

This section provides instructions for importing RSR CLD XML files into the Microsoft Access 2003 databases. Importing an RSR XML file into T-REX gives you the ability to view the RSR data in the Access Tables. Essentially, this is turning the XML file back into the Access Database.

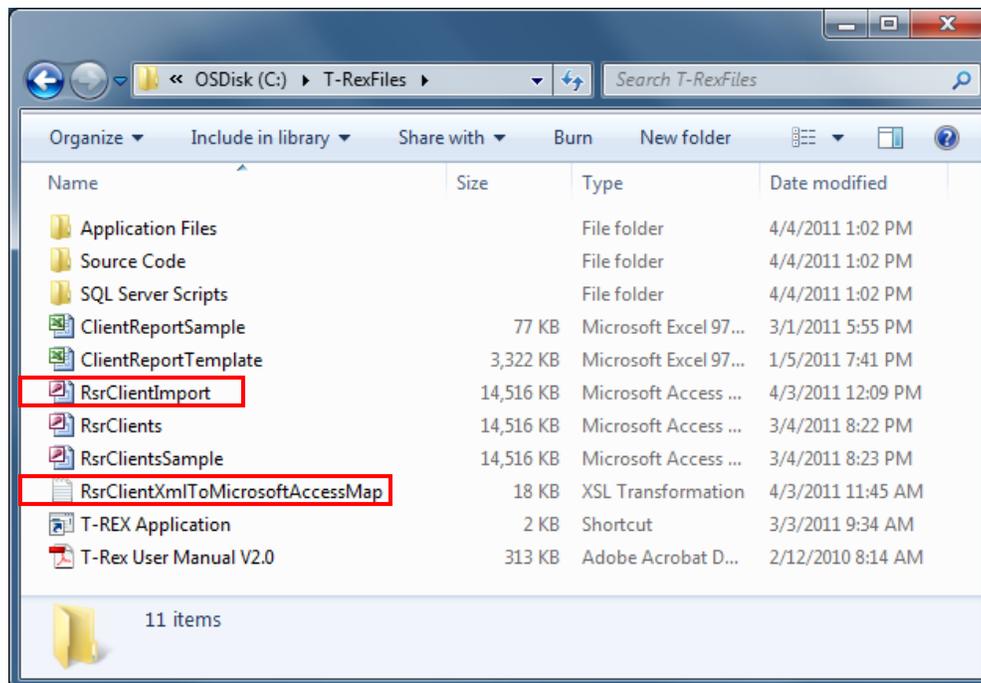
Requirements

- Valid RSR CLD XML file
- Microsoft Access 2003
- RsrClientImport.mdb
- RsrClientXmlToMicrosoftAccessMap.xslt

The two necessary RsrClient files can be downloaded from <https://performance.hrsa.gov/HAB/RSRFiles/>

Please see Section 3 (Installing T-Rex) of User's Guide for directions on how to extract required files.

The downloaded folder structure:



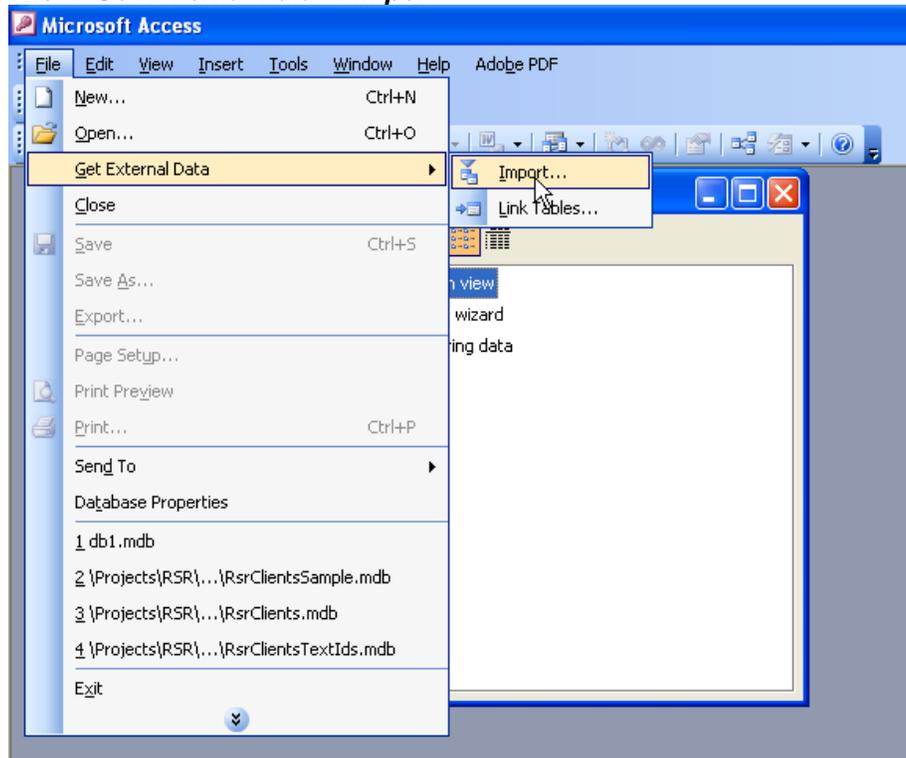
Microsoft Access 2003 Instructions

Step 1 Make a copy of the MS Access database RsrClientImport.mdb. This can be accomplished by clicking the file and then pressing Ctrl-C followed by Ctrl-V.

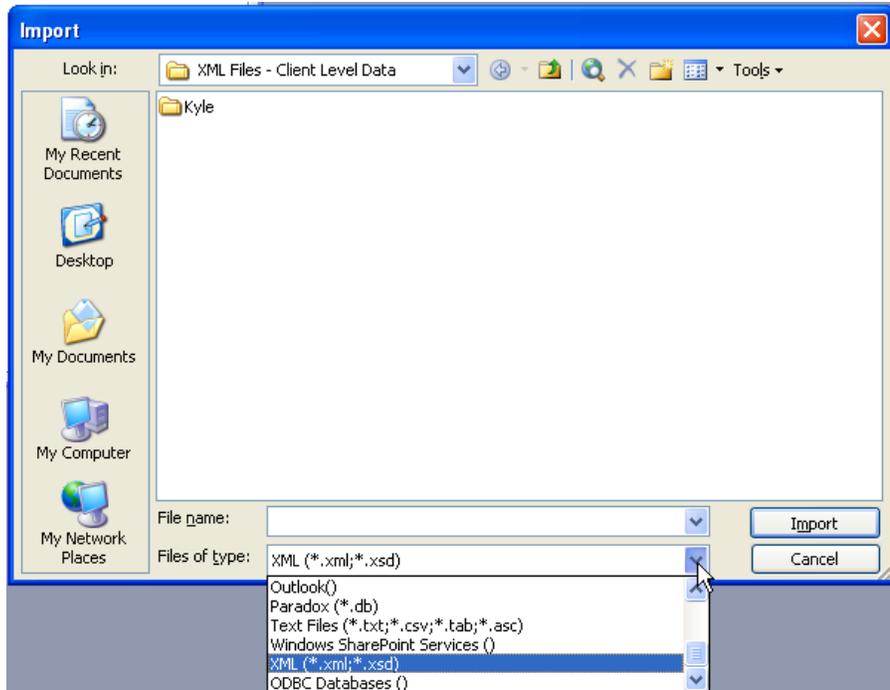
Step 2 Double-click the copy of the MS Access database you created in Step 1 to open it. If prompted, click enable editing.

Step 3 Import the XML file

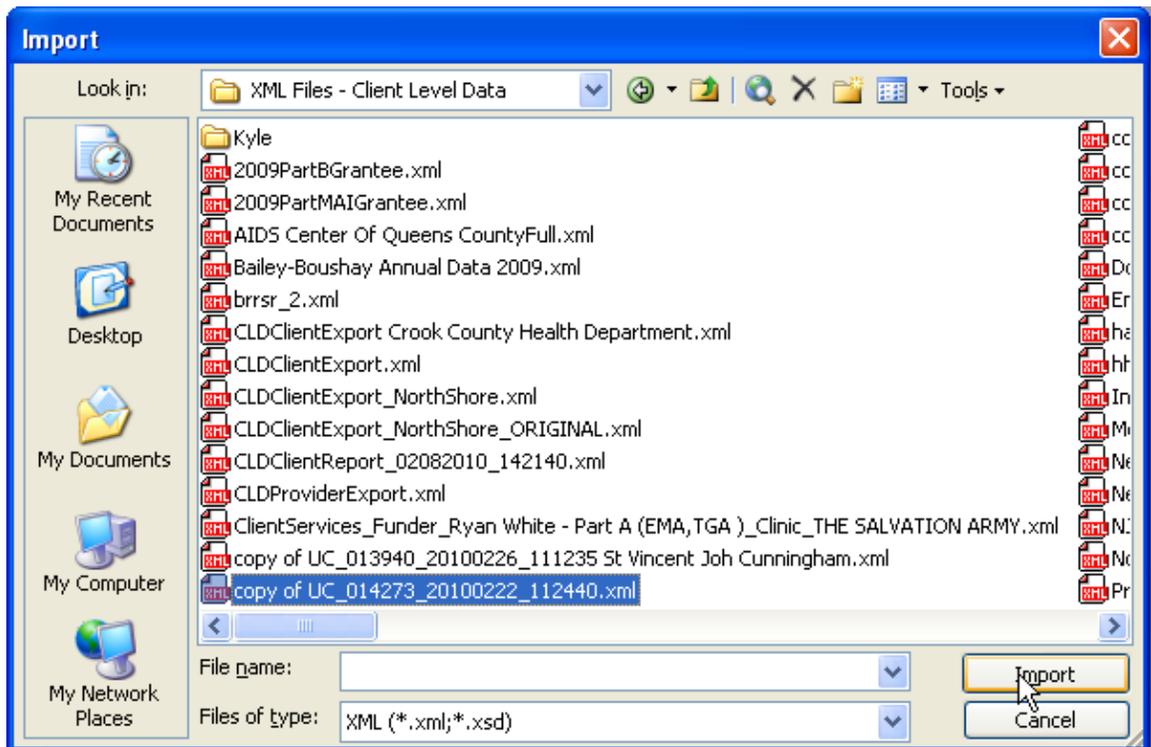
File -> Get External Data -> Import



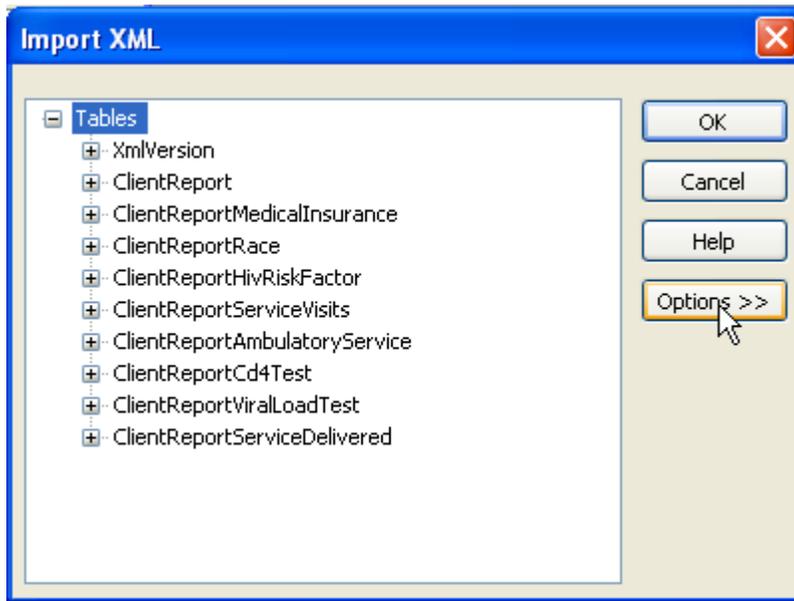
Step 4 Browse to the folder containing your RSR client-level data XML file. Select Files of type XML (*.xml; *.xsd)



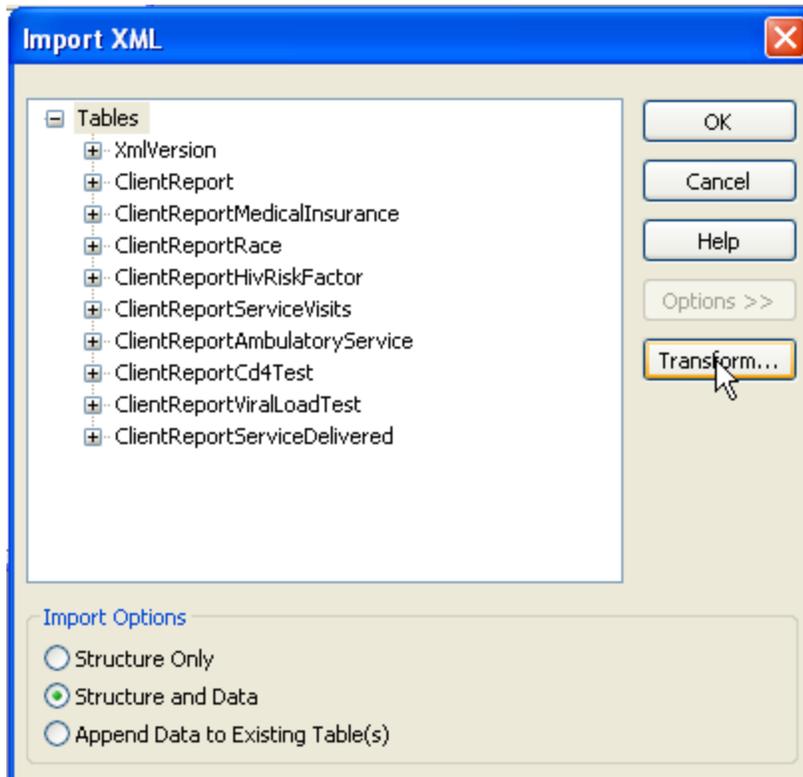
Step 5 Select the file and select the **Import** button



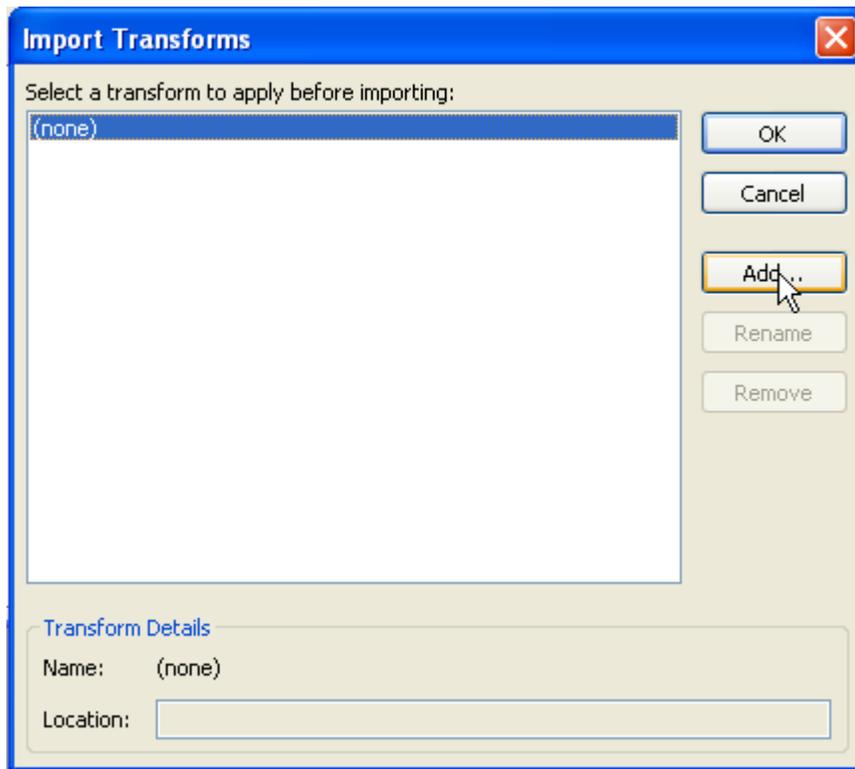
Step 6 Select the *Options* button



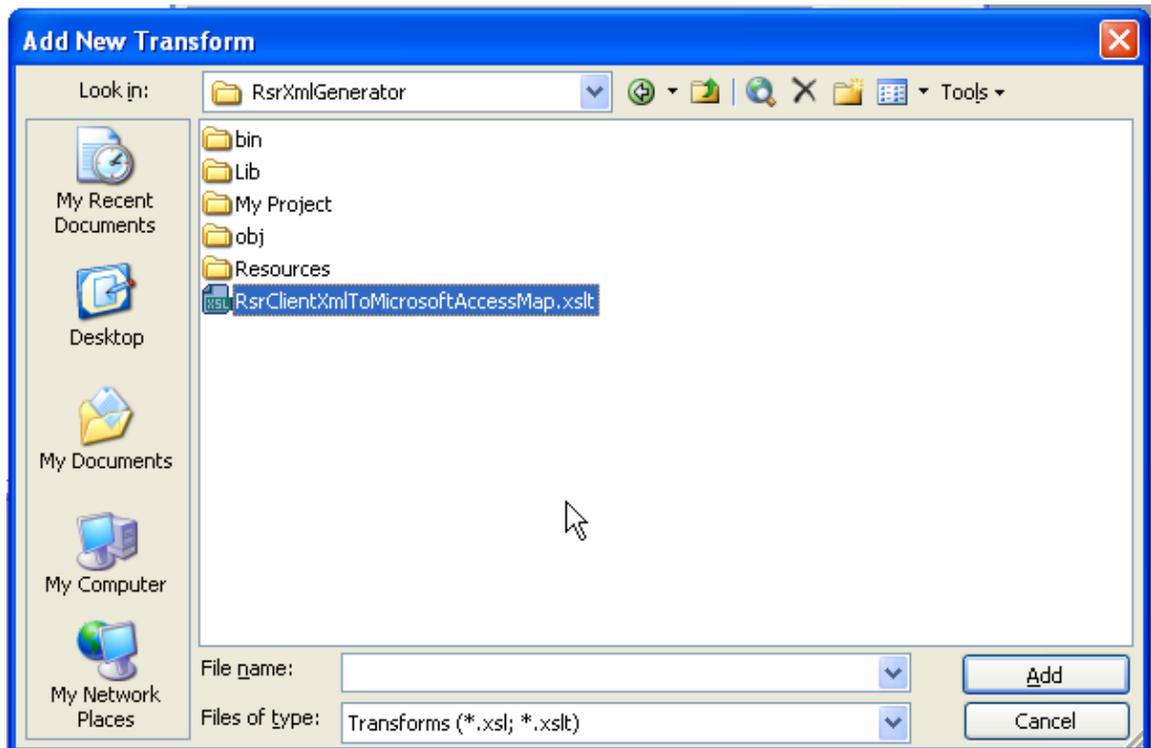
Step 7 Select the *Transform...* button



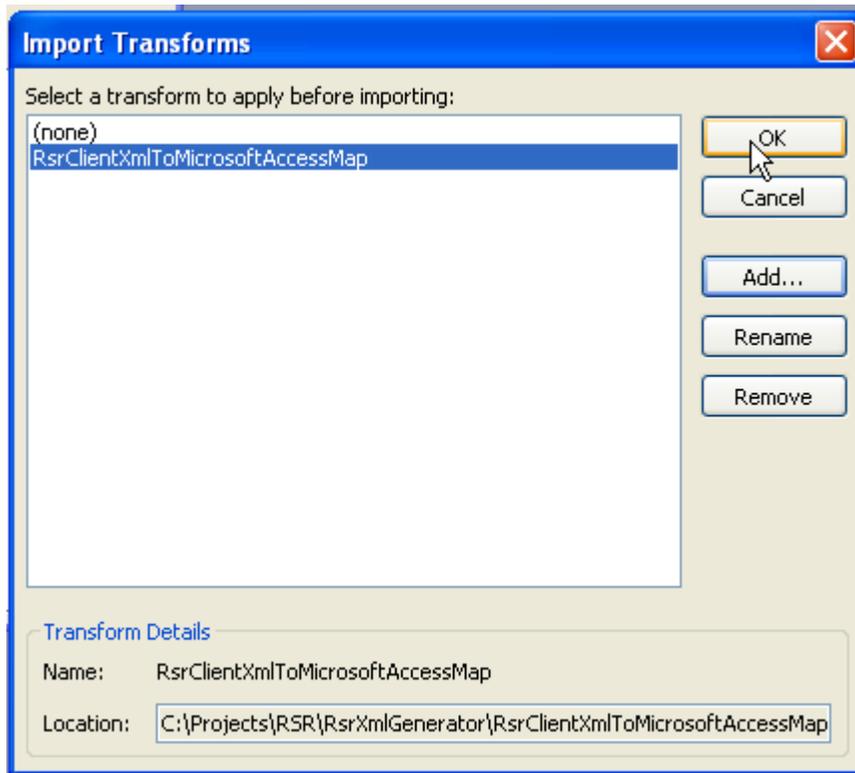
Step 8 Select the **Add...** button



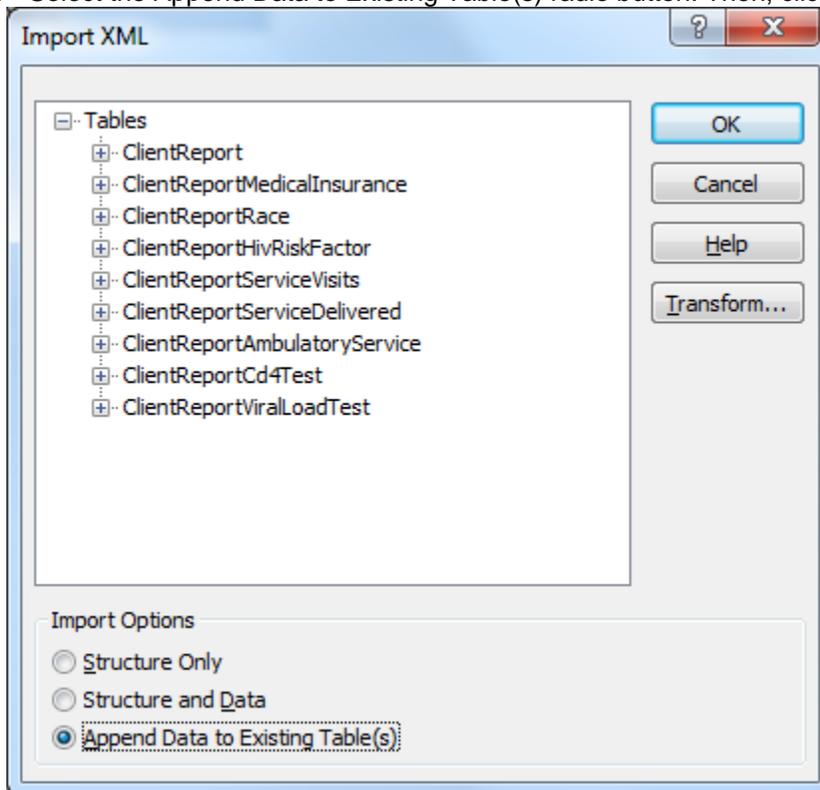
Step 9 Browse to the RsrClientXmlToMicrosoftAccessMap XSL transformation file, highlight the file and select the **Add** button

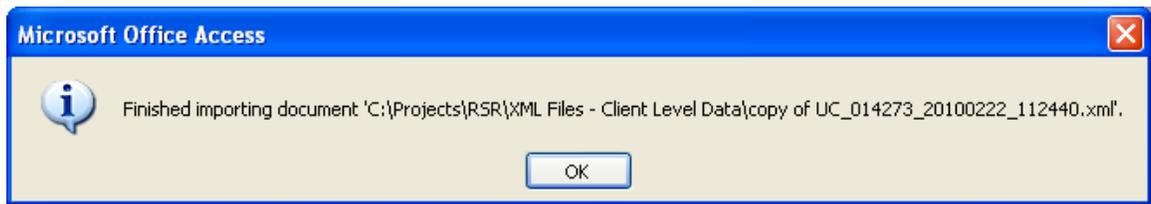


Step 10 Select the *Import Transform* dialog *OK* button



Step 11 Select the Append Data to Existing Table(s) radio button. Then, click OK.





Step 12 Press Ctrl-S to save the Database.

The following tables are populated with the data from the XML file:

- ClientReport;
- ClientReportAmbulatory;
- ClientReportCd4Test;
- ClientReportHivRiskFactor;
- ClientReportMedicalInsurance;
- ClientReportRace;
- ClientReportServiceDelivered;
- ClientReportServiceVisits; and
- ClientReportViralLoadTest

Note: Tables that did not have data in the XML file will not be created.

Example of data contained in *ClientReport* table:

CLD_ID	ReportPeriodID	ClientUci	EnrollmentStatu	BirthYear	EthnicityID	GenderID	PovertyLevelID	HousingStatusID	GeographicUnit	HivAidsStatusID	AidsDiagnosisY	FirstAmbulator
1	NaN	64F40D09B4FE	NaN	1957	1	1	NaN	NaN	208	1	1900	01/01/2005
2	NaN	64F40D09B4FE	1	1965	2	1	4	3	012	1	2005	01/01/2006
3	NaN	105E98E89427	1	1963	2	2	2	1	258	6	1900	05/17/2008
4	NaN	105E98E89427	1	1946	2	2	1	1	258	6	1900	07/07/2008
5	NaN	A6523FF5C999	1	1955	2	2	2	1	259	4	1999	05/17/2008
6	NaN	9367883052AD	1	1947	2	1	1	1	259	4	1999	05/17/2008
7	NaN	2618A637E064	2	1983	2	1	1	1	258	6	1900	05/17/2008
8	NaN	035EAE436553	1	1967	2	1	1	1	259	6	1900	05/17/2008
9	NaN	FF40C6858A9A	1	1965	2	1	2	1	258	4	2008	06/19/2008
10	NaN	4DAFF5A53D2	1	1966	2	1	1	1	253	4	2005	09/11/2008
11	NaN	E8812E88020F	1	1987	2	2	1	1	258	4	2005	05/17/2008
12	NaN	C4184E7C4617	1	1963	2	1	1	1	259	6	1900	05/18/2008
13	NaN	C2A2B121414B	2	1986	2	1	1	1	252	4	2005	01/01/2001
14	NaN	B11559F130D6	1	1967	2	1	3	1	259	6	1900	05/17/2008
15	NaN	83C2399B84D5	1	1964	2	1	1	1	258	4	1991	05/17/2008
16	NaN	25DF708E0C9E	1	1995	2	2	1	1	247	6	1900	05/17/2008
17	NaN	349BB6D68E9	1	1954	2	2	1	1	258	6	1900	05/17/2008
18	NaN	DA7522F92A01	1	1960	2	1	5	1	259	4	2005	05/17/2008
19	NaN	54390CE4CB17	1	1954	2	2	1	2	259	6	1900	10/06/2008
20	NaN	F0C0BF3EF94E	1	1949	1	1	1	1	258	6	1900	05/17/2008
21	NaN	75D97F5C0E64	1	1961	2	1	1	1	258	4	2006	05/17/2008
22	NaN	EBAD590C4991	1	1949	3	1	2	1	259	6	1900	05/17/2008
23	NaN	D4CB4D42848E	1	1949	2	1	2	1	247	4	2002	07/07/2008
24	NaN	535B0C64F1C8	1	1956	2	2	1	1	258	4	2003	05/17/2008
25	NaN	5D5025C0DBF9	1	1978	2	2	1	1	258	6	1900	05/17/2008
26	NaN	2000E69B5587	1	1953	2	1	3	1	258	6	1900	05/17/2008
27	NaN	03F623F3A364	1	1945	2	2	2	1	251	6	1900	07/07/2008
28	NaN	28B7F0B9328A	1	1970	2	2	1	1	111	4	1991	10/06/2008
29	NaN	9C005AB15161	1	1963	2	1	2	1	258	6	1900	05/17/2008
30	NaN	448F29797D1F	1	1946	2	1	1	1	258	6	1900	07/07/2008
31	NaN	A237A8FFAC5E	1	1955	2	2	2	1	258	4	1999	05/17/2008
32	NaN	23F9A3E4E02F	1	1947	2	1	1	1	259	4	1999	05/17/2008
33	NaN	295C849CEDDC	1	1983	2	1	1	1	258	6	1900	05/17/2008
34	NaN	8FB3E0663547	1	1967	2	1	1	1	259	6	1900	05/17/2008
35	NaN	2E6A21D5F0E0	1	1965	2	1	2	1	258	4	2008	06/19/2008
36	NaN	F54264CDDA8C	1	1966	2	1	1	1	253	4	2005	09/11/2008
37	NaN	EDB07A44F8D0	1	1987	2	2	1	1	258	4	2005	05/17/2008
38	NaN	C4184E7C4617	1	1963	2	1	1	1	259	6	1900	05/18/2008
39	NaN	C2A2B121414B	1	1986	2	1	1	1	252	4	2005	01/01/2001
40	NaN	B11559F130D6	1	1967	2	1	3	1	259	6	1900	05/17/2008
41	NaN	83C2399B84D5	1	1964	2	1	1	1	258	4	1991	05/17/2008
42	NaN	25DF708E0C9E	1	1995	2	2	1	1	247	6	1900	05/17/2008
43	NaN	349BB6D68E9	1	1954	2	2	1	1	258	6	1900	05/17/2008
44	NaN	DA7522F92A01	1	1960	2	1	1	1	259	4	2005	05/17/2008
45	NaN	54390CE4CB17	1	1954	2	2	1	2	259	6	1900	10/06/2008
46	NaN	F0C0BF3EF94E	1	1949	2	1	1	1	258	6	1900	05/17/2008
47	NaN	75D97F5C0E64	1	1961	2	1	1	1	258	4	2006	05/17/2008
48	NaN	F0A7F90C4991	1	1949	2	1	2	1	258	6	1900	05/17/2008

Section 2B: Client-Level Data (CLD) XML File Microsoft Access 2007 Import Instructions

This document provides instructions for importing RSR CLD XML files into Microsoft Access 2003 databases.

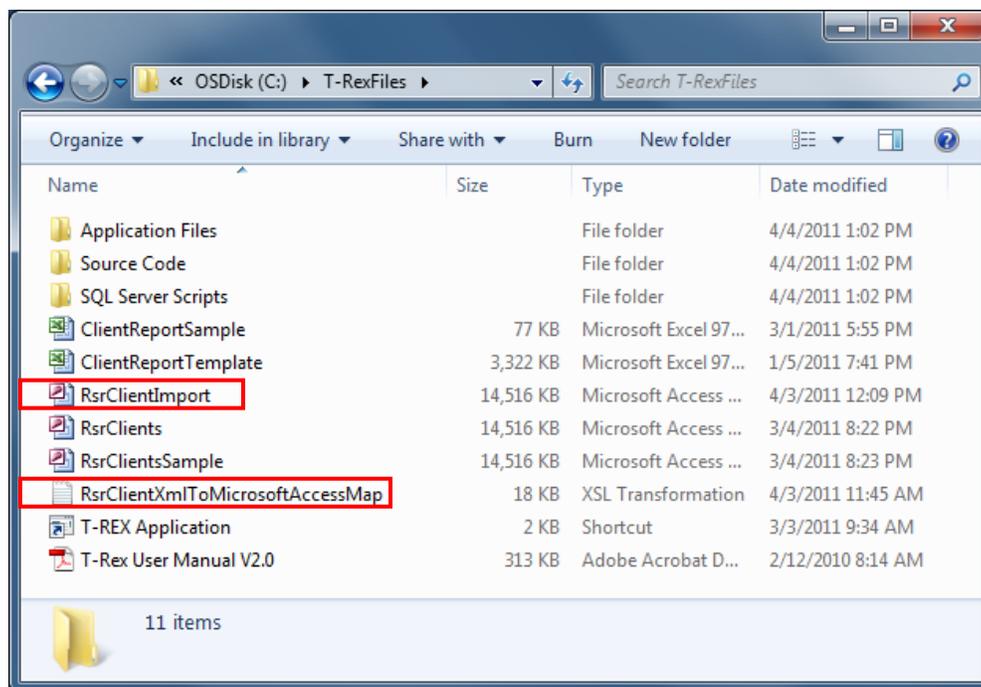
Requirements

- Valid RSR CLD XML file
- Microsoft Access 2003
- RsrClientImport.mdb
- RsrClientXmlToMicrosoftAccessMap.xslt

The two necessary RsrClient files can be downloaded from <https://performance.hrsa.gov/HAB/RSRFiles/>

Please see Section 3 (Installing T-Rex) of User's Guide for directions on how to extract required files.

The downloaded folder structure:

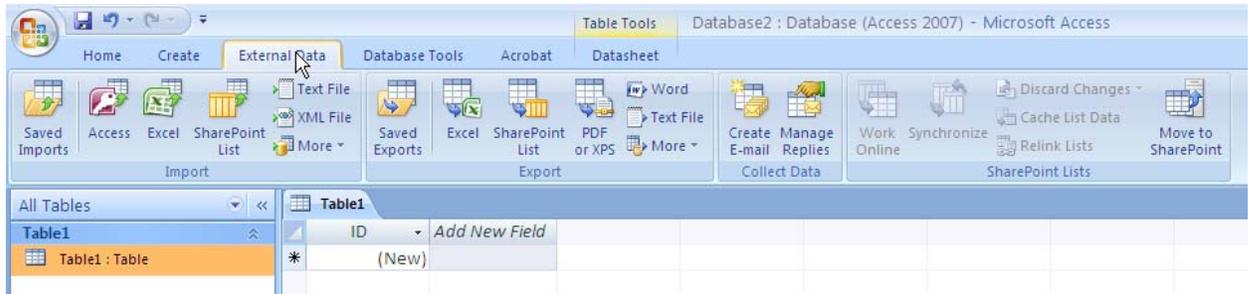


Microsoft Access 2007 Instructions

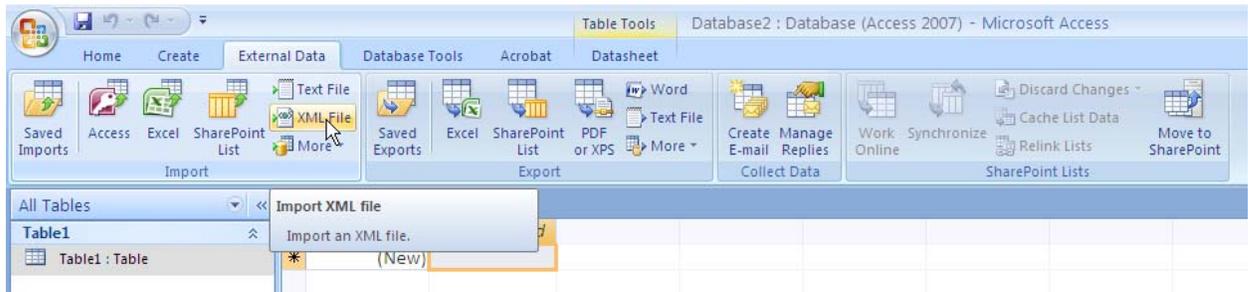
Step 1 Make a copy of the MS Access database RsrClientImport.mdb. This can be accomplished by clicking the file and then pressing Ctrl-C followed by Ctrl-V.

Step 2 Double-click the copy of the MS Access database you created in Step 1 to open it. If prompted, click enable editing.

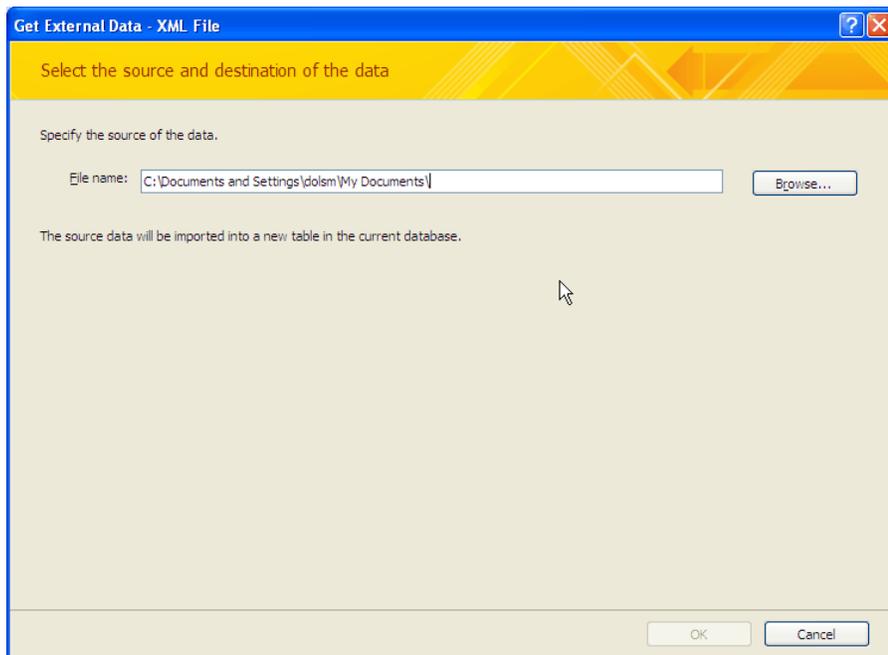
Step 3 Select the *External Data* tab



Step 4 Select the *XML File* command

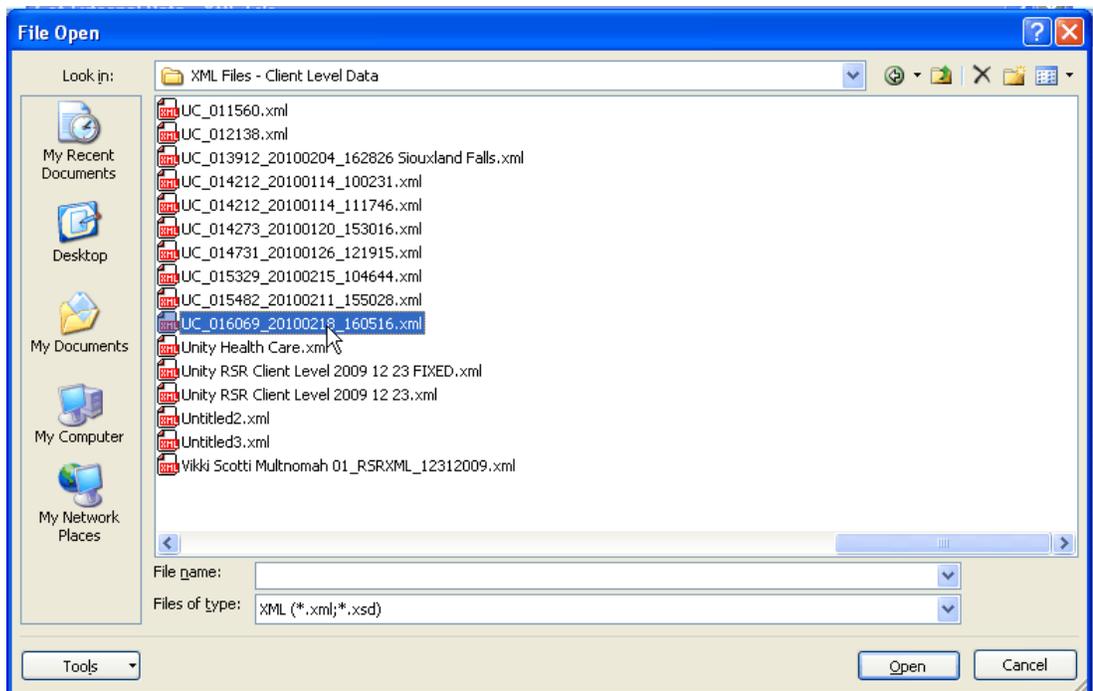


The **Get External Data – XML File** dialog is displayed.



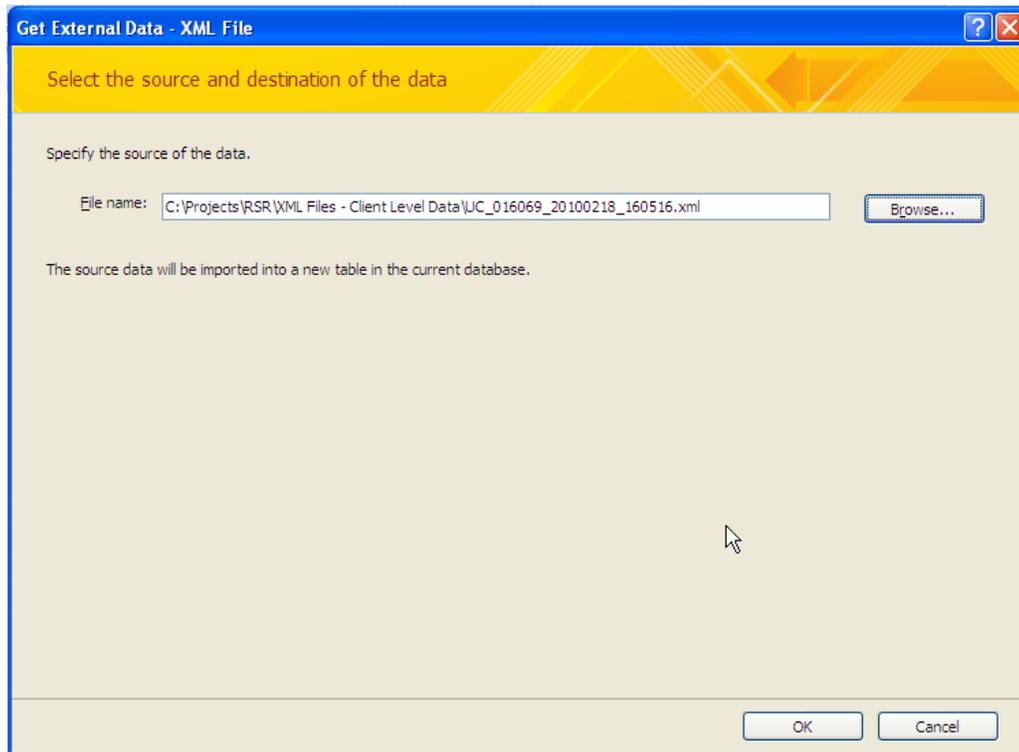
Step 5 Select the **Get External Data – XML File Browse** button

The **File Open** dialog is displayed.

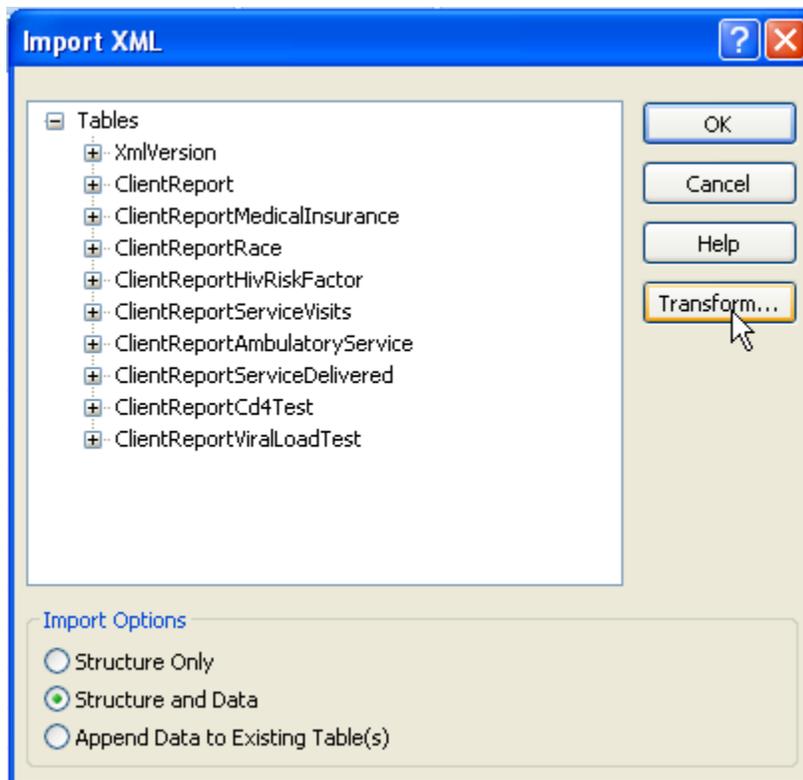


Step 6 Locate and select the RSR CLD XML file that you want to import and either double-click on the file or select the **Open** button.

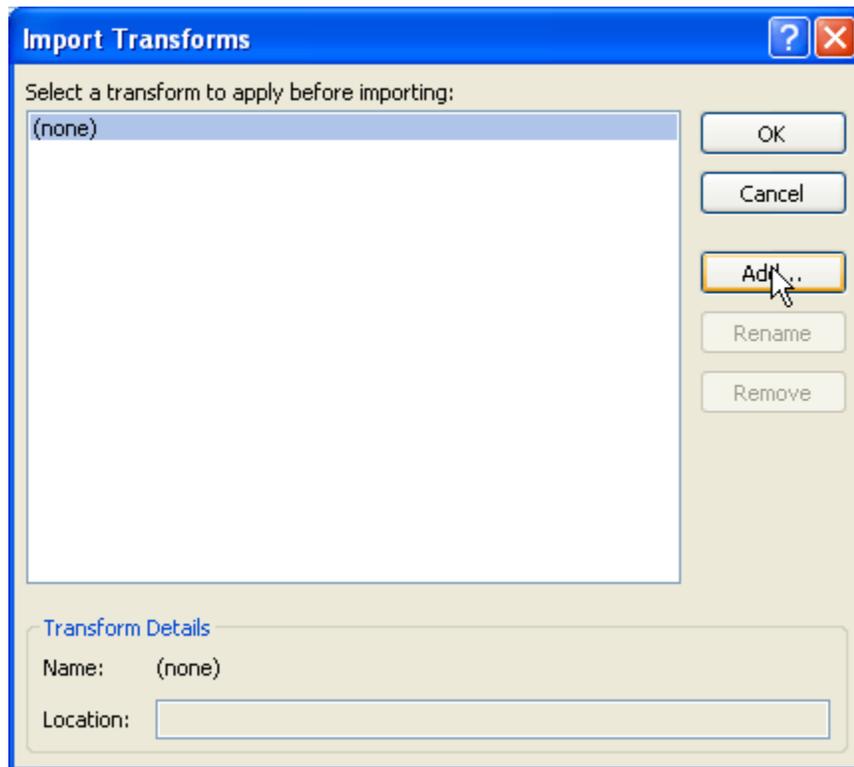
Step 7 Select the **Get External Data – XML File OK** button



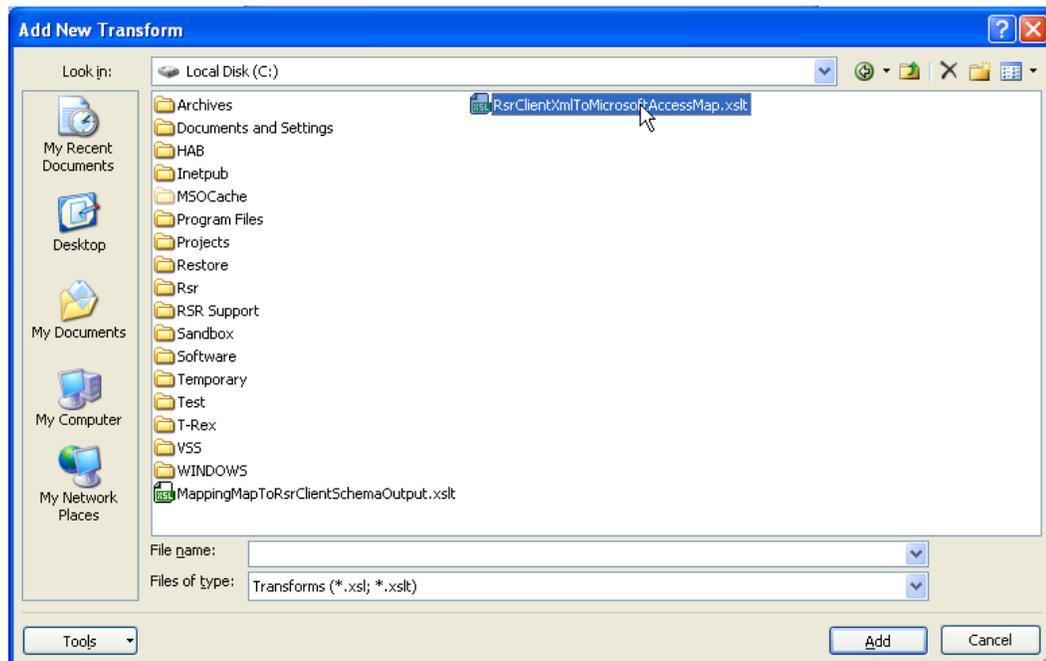
Step 8 Select the **Import XML Transform** button



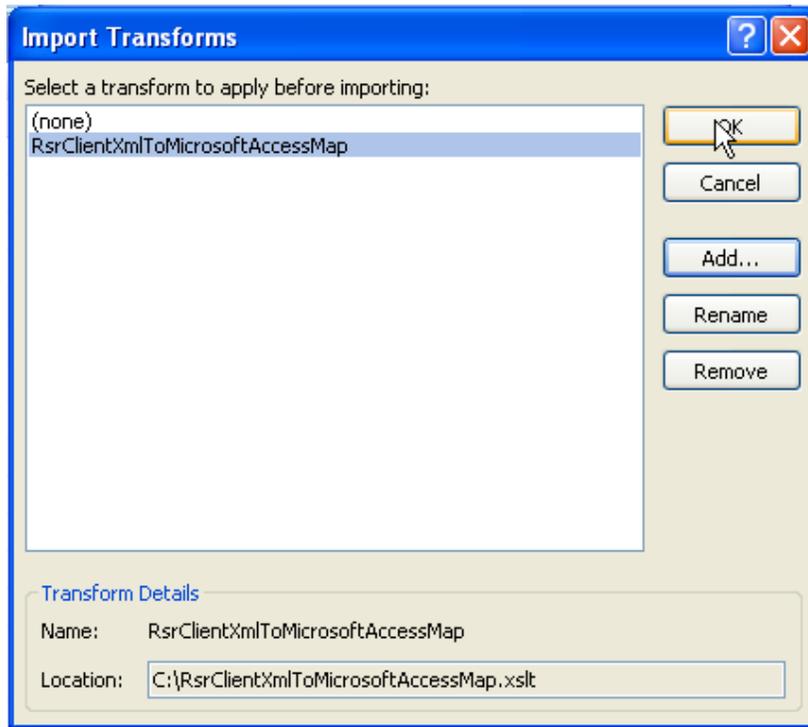
Step 9 Select the *Import Transforms Add* button.



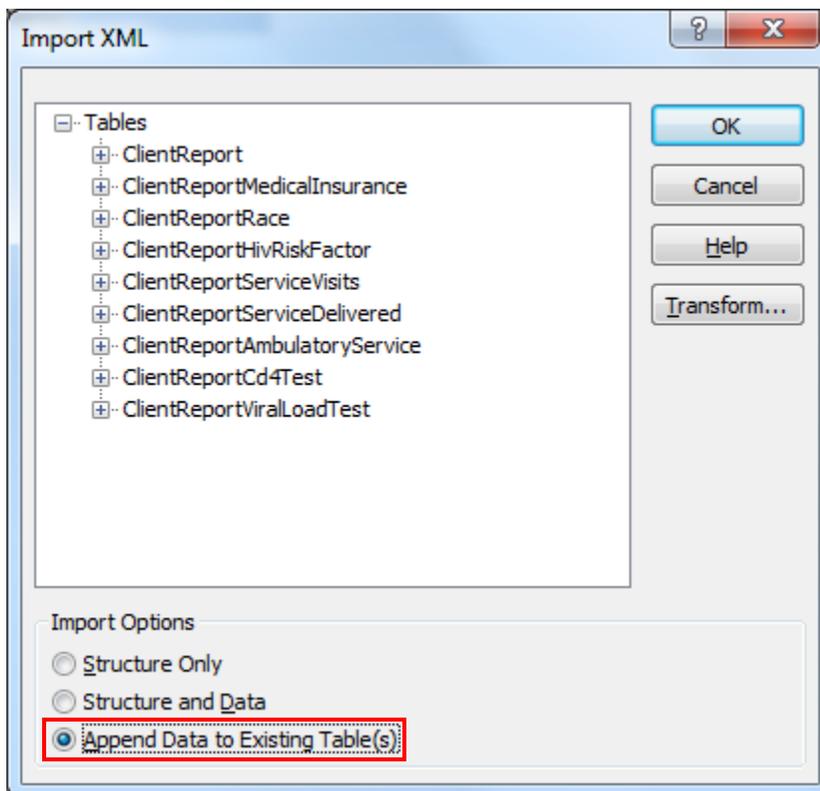
Step 10 Select the *RsrClientXmlToMicrosoftAccessMap.xslt* file and either double-click on the file or select the *Add* button.



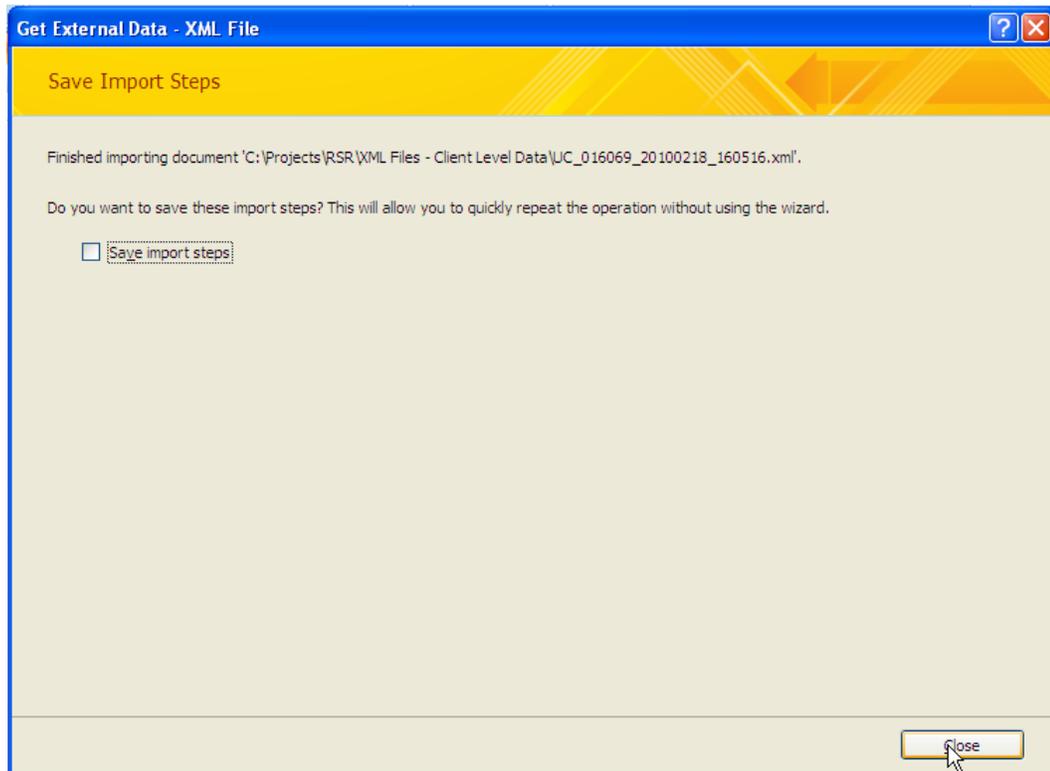
Step 11 Select the *Import Transforms OK* button to accept the changes.



Step 12 Select the Append Data to Existing Table(s) radio button. Then, click OK.



The **Get External Data – XML File** dialog is displayed.



Step 13 Select the **Get External Data – XML file Close** button.

Step 14 Press Ctrl-S to save the Database.

The following tables are populated with the data from the XML file:

- ClientReport;
- ClientReportAmbulatory;
- ClientReportCd4Test;
- ClientReportHivRiskFactor;
- ClientReportMedicalInsurance;
- ClientReportRace;
- ClientReportServiceDelivered;
- ClientReportServiceVisits; and
- ClientReportViralLoadTest

Note: Tables that did not have data in the XML file will not be created.

Example of data contained in *ClientReport* table

ID	ReportPerio	ClientUc	Enrollments	BirthYear	EthnicityID	GenderID	PovertyLeve	HousingStat	Geographict	HivAidsStati	AidsDiagnos	FirstAmbula
1	NaN	64F40D0984FE1	NaN	1957	1	1	NaN	NaN	208	1	1900	01/01/2005
2	NaN	64F40D0984FE1	1	1965	2	1	4	3	012	1	2005	01/01/2006
3	NaN	1C5E8E8E8427C	1	1963	2	2	2	1	258	6	1900	05/17/2008
4	NaN	1C5E8E8E8427C	1	1946	2	2	1	1	258	6	1900	07/07/2008
5	NaN	AE523FF5D999	1	1955	2	2	2	1	258	4	1999	05/17/2008
6	NaN	9367883D52AD	1	1947	2	1	2	1	259	4	1999	05/17/2008
7	NaN	2618A637EB64	2	1983	2	1	1	1	258	6	1900	05/17/2008
8	NaN	035EA438553	1	1967	2	1	1	1	259	6	1900	05/17/2008
9	NaN	FF40C6585A9A	1	1965	2	1	2	1	258	4	2008	06/19/2008
10	NaN	4DAFF5A53D23	1	1966	2	1	1	1	253	4	2005	09/11/2008
11	NaN	E6812E9020FC	1	1987	2	2	1	1	258	4	2005	05/17/2008
12	NaN	C4164E7C4617C	1	1963	2	1	1	1	259	6	1900	05/18/2008
13	NaN	C2A20121414B	2	1966	2	1	1	1	252	4	2005	01/01/2001
14	NaN	B11559F13DD6	1	1967	2	1	3	1	259	6	1900	05/17/2008
15	NaN	83C23996840E	1	1964	2	1	1	1	258	4	1991	05/17/2008
16	NaN	25DF708EBC65	1	1985	2	2	1	1	247	6	1900	05/17/2008
17	NaN	3498B56D85C9	1	1954	2	2	1	1	258	6	1900	05/17/2008
18	NaN	DA7522F92A01	1	1960	2	1	5	1	259	4	2005	05/17/2008
19	NaN	54390CE4CB17	1	1954	2	2	1	2	259	6	1900	10/06/2008
20	NaN	FC0CB3E9F94K	1	1949	1	1	1	1	258	6	1900	05/17/2008
21	NaN	75D97F5C0E64	1	1961	2	1	1	1	258	4	2006	05/17/2008
22	NaN	EBAD580C499C	1	1949	3	1	2	1	259	6	1900	05/17/2008
23	NaN	04C84D42848B	1	1949	2	1	2	1	247	4	2002	07/07/2008
24	NaN	5258C064F1C8	1	1956	2	2	1	1	258	4	2003	05/17/2008
25	NaN	50502520DF9	1	1978	2	2	1	1	258	6	1900	05/17/2008
26	NaN	2D00E69B5587	1	1953	2	1	3	1	258	6	1900	05/17/2008
27	NaN	03F623F8A364	1	1945	2	2	2	1	251	6	1900	07/07/2008
28	NaN	2887F089328A	1	1970	2	2	1	1	111	4	1991	10/06/2008
29	NaN	9C005AB15161	1	1963	2	1	2	1	258	6	1900	05/17/2008
30	NaN	449F297977D1	1	1946	2	1	1	1	258	6	1900	07/07/2008
31	NaN	A737A8FFAC6E	1	1955	2	2	2	1	258	4	1999	05/17/2008
32	NaN	23F9A3648D2F	1	1947	2	1	2	1	259	4	1999	05/17/2008
33	NaN	295C849CEDD0	1	1983	2	1	1	1	258	6	1900	05/17/2008
34	NaN	8FB3ED863547	1	1967	2	1	1	1	259	6	1900	05/17/2008
35	NaN	2F6A21D5F0B	1	1965	2	1	2	1	258	4	2008	06/19/2008
36	NaN	F54264CDDA90	1	1966	2	1	1	1	253	4	2005	09/11/2008
37	NaN	EDB07A44F8D6	1	1987	2	2	1	1	258	4	2005	05/17/2008
38	NaN	C4164E7C4617C	1	1963	2	1	1	1	259	6	1900	05/18/2008