Data for Accountability Transparency and Impact (DATIM)

SIMS Data Cleaning Process Guide

U.S. Department of State – Office of U.S. Global AIDS Coordinator and Health Diplomacy (S/GAC)

SIMS Data Cleaning Process Guide

1   DOCUMENT SCOPE

The DATIM Data cleaning process guide outlines the process and timelines for cleaning SIMS data already in DATIM. Any data being imported into DATIM for the purpose of cleaning previously imported data must satisfy strict requirements with respect to the format of the data, relationship of the data to the current metadata of the system as well as being valid with respect to the destination sites, data elements, and funding mechanisms.

2   CLEANING PROCESS

	Who's Responsible	Action
Prerequisite	Implementing Agency Technical Representative	The data import file(s) must have been tested and met the data import guidelines contained in SIMS 2 0 Data Import Reference Guide_v6 available on the DATIM Data Import and Exchange Resources page on https://datim.zendesk.com/hc/en-us/articles/115002334246-DATIM-Data-Import-and-Exchange-Resources
Step 1	Implementing Agency Technical Representative	Navigate to DATIM.org and select the *DATIM Support* icon found under *Apps* in DATIM and submit a helpdesk ticket. The ticket should: 1. Contain the updated/new data import file(s) 2. Clearly indicated the period the updated/new data import file is applicable for. 3. Clearly indicate what cleaning action is being requested (1) standard cleaning process (2) adhoc cleaning process. 4. If adhoc cleaning is requested, approval from the S/GAC SIMS Lead and the S/GAC PRIME Information Systems Team Lead must be obtained and noted in the ticket **Example text:** "Please note that the FY17Q1 file replaces the one previously submitted. Please delete the records previously submitted for this quarter." This text clearly indicates that cleaning is being requested for **FY17Q1** and the cleaning action requested is the **standard cleaning process**. **Note:** All cleaning request should be consolidated into 1 ticket in Zendesk.
Step 2	DATIM Team	Acknowledge receipt of request and attached file(s).
Step 3	DATIM Team	The DATIM team will proceed and use either the **standard cleaning process or** the **adhoc cleaning process** to perform data cleaning as described below. **Standard Cleaning Process**

1. Before proceeding with cleaning, the updated/new data import file will be verified using R Scripts, Dev-De (for additions and modifications) and Triage (for deletions) to ensure compliance with data import guidelines. If any issues are detected, these will be communicated to the Implementing Agency Technical Representative for remediation before proceeding to perform the cleaning.

2. The DATIM team will then use the last version used to successfully import SIMS data for that period to **delete all records** for that period. **Example:** the old FY17Q1 file previously submitted to ZenDesk during the data import/submission period for the purpose of performing the original data import.

3. Once the all the data has been successfully deleted and verified, the DATIM team will import the updated/new data import file attached to the Zendesk ticket.

Note: The updated/new data import file should contain the data to be kept in DATIM and **exclude** any records that should not be in DATIM.   The file can contain additions i.e. new assessments and modifications i.e. to existing assessments.

- Adhoc Cleaning Process***

  1. The DATIM team will communicate via Zendesk with the Implementing Agency Technical Representative to get the specific Assessment IDs to be deleted. The specific Assessment IDs should be clearly provided in the Zendesk ticket.

  2. The DATIM team will then use the last version used to successfully import SIMS data for that period to **delete all records** for that period.
  Example: the old FY17Q1 file previously submitted to ZenDesk during the data import/submission period for the purpose of performing the original data import.

     2.1 Before proceeding the deletion, last version used to import SIMS data for that period will be verified using R Scripts and Triage (for deletions) to ensure compliance with data import guidelines. If any issues are detected, these will be communicated to the Implementing Agency Technical Representative for remediation before proceeding to perform the cleaning.

		3. Once the all the data has been successfully deleted and verified, the DATIM team will then modify the last version (used to deleted all the data) to remove the assessments specified in the ticket. 4. The DATIM team will then use this modified file (with the removed assessment) to reimport the SIMS data **Note:** This process is **only applicable** for data deletion. ***Warning*** This method is not recommended and should only be requested in exceptional cases because it limits the DATIM team's ability to keep track of changes to SIMS data in DATIM hence future cleaning of the same period's data may not be possible as reconstructing adhoc changes is time consuming and error prone.
Step 4	DATIM Team	On successful deletion, import and verification by the DATIM team, the Implementing Agency Technical Representative will notified via the Zendesk ticket that cleaning has been successfully completed and the ticket will be closed.

3   CLEANING PERIOD

The SIMS data cleaning period will be structured similar to the MER import data cleaning period which is done in accordance with the timeline specified in the PEPFAR Data Calendar.

1. As such cleaning will be performed **once per quarter** and will only be applicable to data imported for the just completed data import/submission period.
2. A cleaning window of about 2 weeks will be provided for agencies to provide details for cleaning as outlined in step 1 above.
    2.1. Adhoc cleaning requests, should be submitted to the DATIM team at least 1 week before the data import deadline.

4   RESOURCES

Several reference and guidance materials explaining DATIM data import are available on the DATIM Support page under the DATIM-Data-Import-and-Exchange-Resources section.