**ACClaim Drop Sampling Guide for Cigna**

**What is Drop Sampling?**
Drop sampling is the process we use to bulk-load intake forms into one of our software products from a .csv file. In the past this was done manually, but now it is mostly automated.

**Environment Setup**

Ensure that you are using “|” as your list separator. To add this as your list separator go to Control Panel. Click the link under "Clock and Region" called "Change date, time, or number formats". Click "Additional settings..." and update "List separator" to be “|”.

**Main Steps**

1. In the file explorer, navigate to \\Wdcapp172\sobi\_shared\_folders\SAM3\ACClaim\_UserData\ACClaimDropSample.
2. Locate the file entitled ACClaimDropSampleInputTemplate.xlsm. Copy it, paste it in a location on your local machine outside of the shared drive, and give it a unique name.
3. Locate the file entitled ACClaimDropSampleFinalizedInput.csv. Copy it and paste it in a location on your local machine outside of the shared drive. It will probably be helpful to put it in the same folder in which you placed the copy of ACClaimDropSampleInputTemplate.xlsm.
4. Open your local copy of ACClaimDropSampleInputTemplate.xlsm. If you get a message in the top banner saying “SECURITY WARING Macros have been disabled” click “Enable Content”. If a popup appears asking whether to make this a trusted document, select “No”.
5. Navigate to the “InputData” tab on the bottom left of the spreadsheet. The “FinalData” tab will be open by default. ***Never*** make changes in the “FinalData” tab, as its purpose is to clean and trim data from the “InputData” tab. Hence making changes directly in the “FinalData” tab can result in dirty data that can potentially cause the whole job to fail.
6. Fill out the spreadsheet in the “InputData” tab. All fields are required. If any field is left black the sample on that line will end up in the fallout table. Also note that due to the data-cleaning process, copying and pasting large amounts of data into this file may take a few minutes.

**IMPORTANT NOTE: *Never*** delete cells! If you need to remove the data in one or more cells, select them, right click, and select “Clear Contents”.
7. Navigate to the “FinalData” tab and copy all data besides the headers.
8. Open your local copy of ACClaimDropSampleFinalizedInput.csv. Scroll to the first empty cell (it will be A2). Select it, right click, and hover over the “Paste Special” option in the context menu. Click “Values & Number Formatting”. Save and close the file.
9. Drag and drop your local version of ACClaimDropSampleFinalizedInput.csv to the following location: [\\Wdcapp172\sobi\_shared\_folders\SAM3\ACClaim\_UserData\ACClaimDropSample](file:///%5C%5CWdcapp172%5Csobi_shared_folders%5CSAM3%5CACClaim_UserData%5CACClaimDropSample). You will get a message asking whether you wish to replace the existing file in the destination. Click “Yes”. The drop sample job will run automatically.

**Troubleshooting Errors**
Intakes that are not sampled or that have any data that is missing or improperly formatted will end up in the fallout table. After an ACClaim drop sample job is finished, the presence of any data in this table triggers an email notification to be sent to the parties set up in the email list. (To add a user to the email list, consult a member of the PBC team). It also triggers the creation of a .csv file containing data from the fallout table at \\Wdcapp172\sobi\_shared\_folders\SAM3\ACClaim\_UserData\Fallout\ACClaimDropSampleFallout\_<date-of-job>.csv. To diagnose the reason for fallout, do the following:

1. Open this file.
2. Open your local copy of ACClaimDropSampleFinalizedInput.csv and delete all existing data besides the header. Save and close the file.
3. Repeat steps 1, 2, and 4 of the **Main Steps**.
4. Copy the data from ACClaimDropSampleFallout\_<date-of-job>.csv to the “InputData” tab of your new local copy of ACClaimDropSampleInputTemplate.xlsm.

**IMPORTANT NOTES:**

* Do not directly modify your original local copy of ACClaimDropSampleInputTemplate.xlsm. Running this file with original data back through the pipeline will result in duplicate samples being loaded into ACClaim (i.e., those that didn’t fail to begin with). You ***must*** copy all data from ACClaimDropSampleFallout\_<date-of-job>.csv to a new local file and only run data from this new file back through the pipeline.
* Similarly, do not directly modify the fallout data file, as it is good to have a record of what failed, when, and why.
1. Scroll to the right-most (“notes”) column of your new local copy of ACClaimDropSampleInputTemplate.xlsm. This column will indicate the data field or fields that caused the fallout for that particular sample. All errors for a sample will be located in the “notes” column and will be semi-colon delimited. Fix the fields that caused the failure.
2. Repeat steps 7 through 9 of the **Main Steps**.

This process can be repeated as many times as necessary until all samples are loaded into ACClaim.

**Archive**A copy of all data in ACClaimDropSampleFinalizedInput.csv is made and saved to [\\Wdcapp172\sobi\_shared\_folders\SAM3\ACClaim\_UserData\Archive](file:///%5C%5CWdcapp172%5Csobi_shared_folders%5CSAM3%5CACClaim_UserData%5CArchive) every time a drop sample job is run. The file name will contain the date and time the job was run for future reference.