Standard Data Import Guidelines

Introduction

To qualify as a standard data import, your data must be submitted to us in an Excel spreadsheet and comply with the requirements outlined in the rest of this document. Generally speaking, you should be able to extract or copy & paste your data from your existing system into Excel. If you are unable to meet these requirements, **we can still import your data**, but additional fees will be applied.

- A standard import must comply with our import standards. Standard imports include two reviews of the import file in which we will evaluate it for meeting our standards.
- As part of each review, IMS will provide a list of issues that need to be corrected as well as a cost for IMS to make the corrections (if possible). You will have one opportunity to fix the issues found and submit the import file for the next review. Failure to correct the issues after a review will require payment of the quoted costs for IMS to make the corrections and move forward.
- Not moving forward with or canceling the data import will result in a partial refund of the standard import fee (75% if canceled after the first review and 50% after the second review). Note that the second review may identify issues that need correcting that were not found in the first review.
- Any issues found during the import process that were not identified during the first two reviews will be addressed for no additional cost, but may require input and updates from you.
- If a second (updated) import file is provided for go-live, it must match the exact structure (tabs, column names, etc.) of the approved import file and not introduce new issues. Any additional corrections will require additional payment.

This is a great opportunity for you to review your data and verify its accuracy before importing it into Innovative Mentoring Software. **Please take time to look over your data carefully and consider what data you want to bring forward into your new database and what data you might want to reference in an archived file.** It is much easier to correct issues at this stage than after it has been imported.

Import Requirements

Implementing the requirements outlined below will ensure a smooth and timely import process. You might consider saving original versions of the extracts you receive from your old system for reference and then modify copies of them to meet our import requirements.

General Requirements

The import process requires

- **Separate** Excel sheets (also referred to as tabs) should be provided for mentors, mentees, matches, guardians (optional), other contacts (optional), activities (optional) and case notes (optional).

- On your mentor, mentee, guardian or other contact sheets, each participant should be listed only once per sheet (or role). All duplicates should be merged into one master record per sheet. Conversely, if your mentors or mentees have been involved in multiple matches, each unique match should be provided as a separate line item on your Matches sheet.

- Names should be separated into first name, last name and middle name/initial columns. All extra spaces should be removed from your first name, last name, and middle name/initials columns. Need help identifying or removing extra spaces? Consider using Conditional Formatting, or, for advanced Excel users, consider using the TRIM function. (Excel's Top ten ways to clean your data)

What to Do		What NOT to Do	
Stephen	Smith	Stephen	Smith

- Record IDs are nice to have especially if you have a lot of data, but are not required. If record IDs are not included, the first name and last name columns will be used to identify records in each sheet—**make sure there are no duplicates (exact full name matches)**. If you include record IDs for some contacts, you must include record IDs for all contacts.

- Only include columns of data that should be imported (**delete anything you don't want** to bring into your new database).

- Use the filtering capabilities of Excel to review all responses you will be bringing into your database. Consider whether you would like to consolidate or correct any of the data. Also consider how your import data will interact with your custom online application form. Update your data as needed to ensure the cleanest start to your database. Keep in mind that your import data WILL update your profile fields so if your import data needs some updating, take time to make those updates now.

  Consider these common examples:

Import Data	NEW Custom Application Form
White	Caucasian
Black	African American

Raw Import Data
City
Minneapolis
Mpls
Minnaepolis
Minn

Using the filter option, you can replace the Import values with the NEW values.

- Each cell in date columns must only contain **one date value** (formatted as mm/dd/yyyy) and no other text.

Mentor & Mentee Requirements

- Each participant on your Mentor & Mentee sheets MUST include the following data:
    - First Name
    - Last Name
    - Program
    - An accurate Current Status

      The participant's status must match your Matches sheet data if your participant is in a Matched of Match Completed status.

      In other words, if the participant's Current Status is Matched, they must have at least one match record on the Matches tab that includes a Match Start Date but does not have a Match End Date. If the participant's status is Match Completed, any/all match records for that participant must include a Match End Date.

- You may want to consider including registration step completion dates (a unique column for each registration step). Here is an example of potential Mentor registration steps with dates (highlighted yellow) and how you might include them in your import file for visual reference:

A	B	C	AI	AJ	AK	AL	AM	AN	AO
Mentor ID	First Name	Last Name	Application	Reference 1	Reference 2	Reference 3	Schedule Training	Training	Background Check
1	Jane	Mentor	03/24/2010	03/24/2010	03/24/2010	03/24/2010	03/24/2010	03/24/2010	03/24/2010
2	Bob	Mentor	03/03/2017	03/03/2017	03/03/2017	03/03/2017	03/03/2017	03/03/2017	03/03/2017
3	Paula	Mentor	09/23/2009	09/23/2009	09/23/2009	09/23/2009	09/23/2009	09/23/2009	09/23/2009
4	Lynda	Mentor	01/08/2013	01/08/2013	01/08/2013	01/08/2013	01/08/2013	01/08/2013	01/08/2013
5	Elaine	Mentor	01/31/2013	01/31/2013	01/31/2013	01/31/2013	01/31/2013	01/31/2013	01/31/2013
6	Diana	Mentor	10/01/2006	10/01/2006	10/01/2006	10/01/2006	10/01/2006	10/01/2006	10/01/2006
7	Cheryl	Mentor	03/05/2012	03/05/2012	03/05/2012	03/05/2012	03/05/2012	03/05/2012	03/05/2012
8	Joseph	Mentor	10/27/2010	10/27/2010	10/27/2010	10/27/2010	10/27/2010	10/27/2010	10/27/2010
9	Diane	Mentor	09/01/2004	09/01/2004	09/01/2004	09/01/2004	09/01/2004	09/01/2004	09/01/2004
10	Fran	Mentor	11/11/2011	11/11/2011	11/11/2011	11/11/2011	11/11/2011	11/11/2011	11/11/2011

Mentees | **Mentors** | Guardians | Matches | MenteeCommuncation | Lists | +

If you don't know these dates, you could consider filling them with the Waiting or Match Date for any participants (mentors or mentees) who are Waiting, Matched, Match Completed, or Active. Including these dates now will mean that if a mentor or mentee is re-matched later, you can copy forward these existing process step dates and you won't have to fill in required dates each time you need to add a new involvement.

- Match information should **NOT** be included in the mentor and mentee sheet (put it on a separate match sheet).

- Mentors/mentees who are or were involved in a mentoring program (or a program that involved matching) must include one of the following statuses and the corresponding required status date (formatted as a date: mm/dd/yyyy):

Eligible statuses for Matching Programs:

Current Status	What the Status Means in Innovative Mentoring Software	Required Status Date(s)
Inquiry	The applicant has inquired about the program but has not officially applied to participate in the program.	Inquiry Date
Registering	The applicant has applied to the program and has started the enrollment process.	Registering Date
Waiting	The applicant has completed their registration and/or screening steps and is ready to be matched.	Waiting Date
Matched	The participant is actively involved in one or more matches.	Waiting Date* and Matched Date
Match Completed	The match has ended, and the participant is no longer involved in a match.	Waiting Date*, Matched Date, and Match End Date
Discontinued	The applicant never completed enrollment and is no longer enrolling in the program.	Discontinued/Rejected Date

Rejected	The applicant is not qualified to participate in the program.	Discontinued/Rejected Date

*If you have incomplete or no Waiting Date data, you can provide the Matched Date as the Waiting Date. Note: this will impact reporting on the average length mentees wait to be matched in your program.

- We recommend including the following dates (even if approximate) in addition to the above listed **required status date(s)** if known:
    - Inquiry Date
    - Registering Date

- Mentors/mentees who are or were involved in a non-mentoring/non-matching program (or an historical program for which matching data does NOT exist) must include one of the following statuses and the corresponding required status date:

Eligible statuses for Non-Matching Programs:

Current Status	What the Status Means in Innovative Mentoring Software	Required Status Date
Inquiry	The applicant has inquired about the program but has not officially applied to participate in the program.	Inquiry Date
Registering	The applicant has applied to the program and has started the enrollment process.	Registering Date
Active	The participant completed their enrollment and is actively involved in the program.	Active Date (Non-Mentoring)
Closed	The participant is no longer actively involved in the program or has completed the program.	Active Date (Non-Mentoring) and Closed Date (Non-Mentoring)
Discontinued	The applicant never completed enrollment and is no longer enrolling in the program.	Discontinued/Rejected Date
Rejected	The applicant is not qualified to participate in the program.	Discontinued/Rejected Date

- Review for duplicate contacts on each sheet (in other words full name matches). Remove any duplicates before submitting.

Guardian Requirements

- If guardian data is being submitted for import, put the guardian's first name and last name in separate columns on the mentee sheet and then put the rest of the guardian's information on a separate sheet with matching first name and last name values.

- Guardians referenced on the mentee sheet must also be found on the guardian sheet and names must match **exactly** (spaces and letter case count!).

- Review for duplicate contacts on this sheet (in other words full name matches). Remove any duplicates before submitting.

Match Requirements

- The match sheet must include the following columns: Mentee First Name, Mentee Last Name, Mentee Waiting Date*, Mentor First Name, Mentor Last Name, Mentor Waiting Date*, Match Start Date, and Match End Date. If record IDs were included on your Mentors/Mentees sheets, they must be included on the Matches sheet and match the corresponding value on the Mentors/Mentees sheet.

  *Mentee Waiting Date and Mentor Waiting Date are the dates that each began waiting before being matched—if this is his/her second match, the waiting date might be the day after his/her previous match ended. If waiting dates are not known, the Match Start Date will be used, which will impact reporting on the average length mentees wait to be matched in your program.

- Mentors and mentees referenced on the Matches sheet <u>must be found on the corresponding mentor and mentee sheets</u> (and vice versa! If your mentor/mentee has been matched and their current status indicates such, they must be listed on your match sheet) and their full name or record ID must match **exactly** (spaces and letter case count!).

Activity & Case Note Requirements

- Mentor and mentee names (or record IDs) referenced on the activities and case notes sheets must be found on the corresponding mentor and mentee sheets and must match **exactly**.

- Suggested columns for Activities include: Date/Time, Hours (numeric), Times (in case you have it in aggregate per month), Activity Name and Notes. Other columns might be accommodated with labels, so feel free to include.

- Suggested columns for Case Notes include: Date/Time, Type (In-Person, Phone, Email, Note), Subject and Message/Notes. Other columns might be accommodated with labels, so feel free to include.

General Contacts

- Additional contacts can be imported from separate sheets (one for individuals and one for organizations). If certain contacts are also included on other sheets (EXACT full name matches), the information on those sheets will override the data on the general contact sheet. The only required fields are the name (First Name and Last Name for individuals and Organization Name for organizations).

- Review for duplicate contacts on this sheet (in other words full name matches). Remove any duplicates before submitting.

Donor & Donation Requirements (Fundraising Module)

- Donors must be separated into two sheets: one for individuals and one for organizations. Likewise, donations must be separated into two additional corresponding sheets. The only required fields are the donor name (First Name and Last Name for individuals and Organization Name for organizations).

- The donation sheets must include the donor name (First Name and Last Name for individuals and Organization Name for organizations). The names must match the names found on the Donor sheets and must match **exactly** (or record IDs could be used).

- Donations must include the Donation Date and Amount.

Miscellaneous Requirements

- To import spouses as separate records (e.g. one spouse might be a mentor while the other is a board member) and link them to synchronize their mailing address, include both spouses as separate rows (on the Mentor, Donor or Contact Individual sheets) and include Spouse First Name and Spouse Last Name columns (or Spouse ID if you have record IDs).

Frequently Asked Questions

Should I include all of my data?

It depends. If you have complete and accurate data, it is generally a good idea to import it. Having all of your match history in one place is necessary to produce valuable reports that demonstrate what your program's accomplishments. However, importing incorrect/incomplete data will make reporting harder. Additionally, **incomplete data can make the import process considerably more work for you to comply with the standards and you may end up incurring additional expenses. If your historical data is incomplete and you do not have a strong Excel and data-minded resource to prepare your import, you may consider simply importing current participants and matches and keeping the rest of your data in spreadsheets as your archive.**

It is probably not worth it to import old/inactive mentors and mentees who never completed the registration process in your program.

What happens to information I enter in my old system between the time I hand over the Excel file to be imported and going live with Innovative Mentoring Software?

You have two options for handling data that is edited or added after handing your import files over and before going live with IMS.

1. You can keep track of changes you make during that time and plan to make them manually in Innovative Mentoring Software after you go live. To minimize this issue, make sure your files meet the requirements the first time you submit them and complete your self-guided training as soon as your training database is ready.
2. You can provide an updated import file. **It must match the exact structure (tabs, column names, etc.) of the approved import file (provided by IMS after your import is run in your training environment) and not introduce new issues.** Any additional corrections will require additional payment.

What happens if the files I submit for importing do not meet the requirements?

We will contact you and let you know which changes would need to be made in order to meet the guidelines and any costs assessed for failing to comply as detailed in the Introduction.