Safety Culture InfoTurn Technical Transmission Instructions

Press Ganey's InfoTurn® System

To use Press Ganey's InfoTurn System, you send us a "data file" that contains your staff's information. We refer to the data file as your "upload." Each data file includes multiple "records." Each record, which represents one staff member, is comprised of many "fields." Each field carries a different piece of information (e.g., last name).

Required/Recommended Data Fields

Below are required and recommended fields. The highlighted fields are required for the specified distribution methods. Your internal IT representatives may be able to help you pull some or all of these records, so consider sending these instructions to them. If having previously surveyed, to see unit trends the same Unit Code or Unit Name should be used. Notify your Press Ganey representative if changing Unit Codes or Unit Names.

Press Ganey recommends including as much demographic information as possible in the data file. This will ensure the data are accurate and allow you to further breakout the data, making it more meaningful and useful. If you are unable to provide some of the recommended demographic data, custom questions can be added to your survey tool in order to capture this information. Please consult with your Press Ganey account manager for further details.

Bulk Handout Data Fields

Field Name	Description
Survey Designator	Alphanumeric code indicates survey type. Assigned to you by Press Ganey
Client Number	Client identification number assigned to you by Press Ganey
Unique ID	Unique identifier associated with each record uploaded
Unit Code and/or Unit Name	Unit Code associated with a nursing unit or other area within the facility
	Unit Name associated with a nursing unit or other area within the facility (8 character limit)
Language	Staff member's primary language (0=English; 1=Spanish)
E.O.R. Indicator	End-of-record marker (i.e., $)

Note: For Bulk Handout, surveys will be distributed to facilities in the order they are sent in the data file.

Email and Home Mailing Data Fields

Field Name	Description
Survey Designator	Alphanumeric code indicates survey type. Assigned to you by Press Ganey
Client Number	Client identification number assigned to you by Press Ganey
Last Name	Staff member's last name
First Name	Staff member's first name
Middle Initial	Staff member's middle initial
Address 1	Address for mailing. Abbreviations may be rejected. **(Required only if mailing)**
Address 2	Apartment, Suite, etc.
City	City spelled out. Abbreviations may be rejected. **(Required only if mailing)**
State	Standard U.S.P.S. two-letter state abbreviation. **(Required only if mailing)**
ZIP Code	Five digits. Additional four-digit add-on is acceptable. **(Required only if mailing)**
Email	Staff member's email address. **(Required only if emailing survey access)**
Unique ID	Unique identifier associated with each record uploaded
Site	Staff's primary location if multiple sites exist within the organization
Unit Code and/or Unit Name	Unit Code associated with a nursing unit or other area within the facility Unit Name associated with a nursing unit or other area within the facility (8 character limit)
Language	Staff member's primary language (0=English; 1=Spanish). **(Required only if mailing)**
E.O.R. Indicator	End-of-record marker (i.e., $)

Data Submission

Data files should be submitted via email to your account manager. Please save your file as a CSV format prior to transmitting it. These instructions walk you through the process of creating an Excel CSV file. Note: Menu options may vary depending on your version of Microsoft Office. Microsoft Excel XLS, Microsoft Word, and Microsoft Access documents are not permitted.

1. Open a new Excel spreadsheet. Click the empty cell above row heading "1" and left of column heading "A." This highlights the entire spreadsheet. Tip: You may also select the entire spreadsheet by pressing **CTRL + A.**
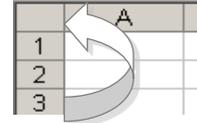
2. From the main menu, select **FORMAT > CELLS > NUMBER > TEXT** and click **OK**. This formats all cells in the spreadsheet as "Text."

3. To populate your spreadsheet with your customer data, use the main menu to select **DATA > IMPORT EXTERNAL DATA > IMPORT DATA**. Select your source data and follow the prompts to import your text file.

4. Format the ZIP Code field as "ZIP Code." To do this, highlight the ZIP Code column and select **FORMAT > CELLS > NUMBER > SPECIAL > ZIP CODE** or **ZIP CODE + 4**. This prevents Excel from truncating leading zeros at the beginning of the ZIP Codes.
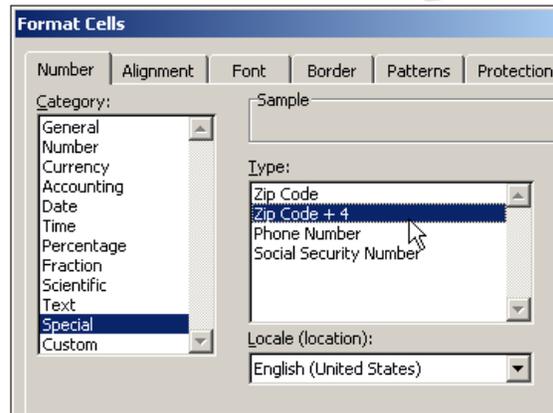
5. Save your file after import by selecting **FILE > SAVE AS**. Choose "CSV (Comma delimited) (*.csv)" under "Save as type."
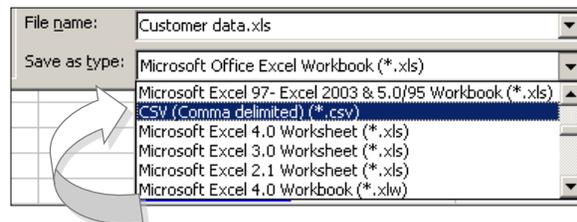
Once your data file is received, your account manager will review it to make sure all required fields are present. The file will also be tested for invalid or missing addresses. If any are present, a "bad address" report will be sent back to you for review. Corrections to bad addresses should be made in the original file you sent and resubmitted to your account manager. If you determine the addresses are in fact correct, we will mail to the address as is.

Your account manager will work with you to determine an appropriate timeline for this project and also communicate a due date for the final data file submission with all corrections made. This process tends to take weeks for most, so Press Ganey recommends that you provide the data as soon as possible.

Press Ganey Support

For questions or concerns about your InfoTurn setup, please contact your Press Ganey account manager at 888.773.7742.