

# CARGOS Edit Checks Dashboard Help Document

## Intended use

The CARGOS Edit Checks dashboard is an interactive, secure, web-accessible platform for funded CARGOS sites that send CDC line-listed clinic and lab data, to view flagged data validity issues (hereafter referred to as “edit checks”). Sites can use the dashboard to:

- Generate a summary of the types and frequencies of edit checks to see the magnitude of issues, and prioritize edit checks for review and potential revision; and
- Review and download edit checks in line-list file format.

Starting in 2025 (and available December 2024 for pilot-testing), this dashboard will be used to identify edit checks requiring attention and revision to ensure data quality for CARGOS. Sites that send line-listed clinic and lab data via CARGOS will be responsible for regularly checking the dashboard in advance of the calendar year closeout deadline.

Questions related to dashboard technical issues (e.g. questionable displays with the dashboard, dashboard access issues, information gaps in the help document), data errors (e.g. records flagged for edit checks when they are not warranted), as well as feedback on dashboard design and features, should be sent to [cargos@cdc.gov](mailto:cargos@cdc.gov) (copying [dstdp\\_dashboards@cdc.gov](mailto:dstdp_dashboards@cdc.gov)).

## Accessing the dashboard

You can access the dashboard at this link: [https://app.powerbigov.us/links/dnTY1K7oEK?ctid=6fcbbe36-3b86-450c-9c5e-1a17a5cd4988&pbi\\_source=linkShare](https://app.powerbigov.us/links/dnTY1K7oEK?ctid=6fcbbe36-3b86-450c-9c5e-1a17a5cd4988&pbi_source=linkShare). Please log-in using your Secure Access Management Service (SAMS) account ID (e.g. \*\*\*\*\*@cdcpartners.gov). If you have any questions about your SAMS account ID, please contact [cargos@cdc.gov](mailto:cargos@cdc.gov). The dashboard may time-out after approximately 2 hours of inactivity.

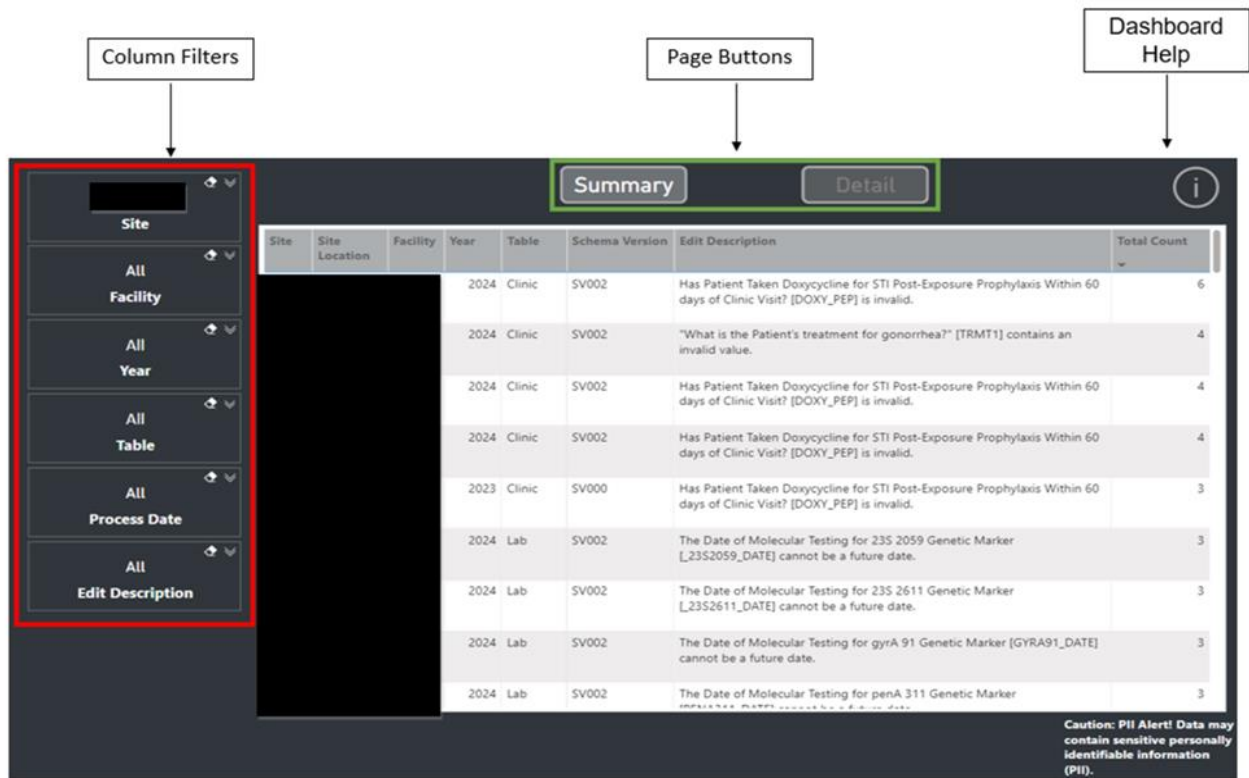
## Using the dashboard

### Dashboard layout

The dashboard has two pages: the Summary page and the Detail page (see the next section, “Comparing the dashboard pages” for page-specific details). Each page has a customized user interface with a page selection menu, column filters, and an interactive table that allows users to sort, filter, and export tables to review edit checks and make revisions if needed. The table on the Summary page will display the types and frequencies of edit checks and the Detail page will display line-listed edit checks.

By default, the dashboard opens on the Summary page (Figure 1). The tables on each page will automatically populate but only show data specific to the users’ own site. Data are displayed based on site-based permissions (e.g. Denver’s clinic and public health laboratory staff will only see Denver’s data) and are limited to the calendar years that have not yet been closed out.

Figure 1. Dashboard Layout (Summary Page)



### Filtering and searching data

The filters on the left of each page can be used to limit the displayed row(s) to those matching the criteria specified in the filters. Clicking the downward pointing arrow (at the top right-hand corner of the selected filter) and then clicking the dropdown menu will display all the values within the associated variable that users can use to filter the table (Figure 2a). Note: the dropdown menu values are driven by the edit checks requiring sites' review; if a value is not displayed in the dropdown menu for a given filter, then there are no edit checks associated with that value. Clicking the upward pointing arrow (at the top right-hand corner of the selected filter) will close the variable's value selection menu and display the selected value(s). To remove the column's previously set filter conditions, or to select all values for a variable, click the eraser icon to the left of the downward pointing arrow (Figure 2b). By default, filter selections carry over across the dashboard pages (e.g. if the Facility, "DEN-01", is selected on the Summary page, it will also be selected on the Detail page).

Users can search within a filter by clicking the downward pointing arrow at the top right-hand corner of the selected filter, clicking the dropdown menu (Figure 2a), and typing keywords or numbers in the search bar that appears at the top of the value selection list (Figure 2c).

Figure 2a. Click the downward pointing arrow to access the dropdown menu to filter the table

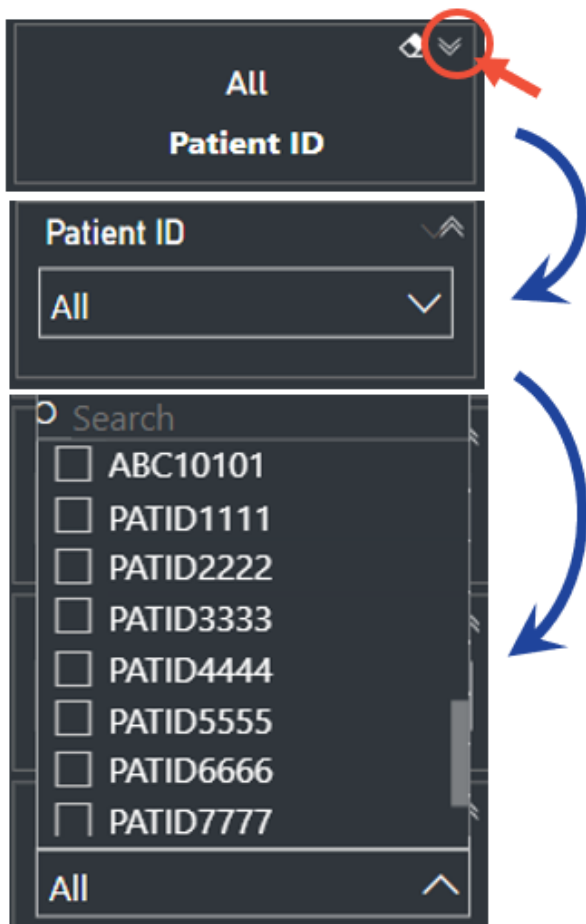


Figure 2b. Click the eraser icon (circled) to remove the selected filter or select all values for a variable

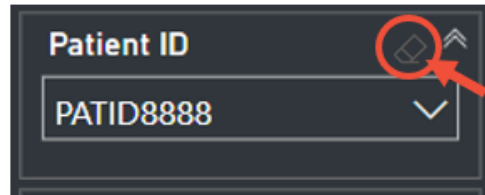
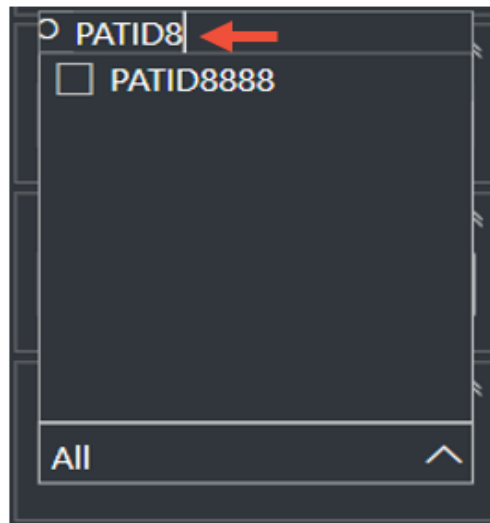


Figure 2c. Type in the search bar to search within a filter



### Sorting data

Users can sort the rows of each table by clicking on the column that they wish to sort by. When first clicking a column name, all rows will be sorted alphabetically or numerically in ascending order (indicated by the upward pointing arrow) based on the variable in the clicked column. Click the column name once more to sort in descending order (indicated by the downward pointing arrow). See Figure 3.

By default, the table on the Detail Page is sorted by the Edit (row) Number, which is ordered by the Data Submission Date, Facility, Patient ID/Cargos Specimen ID, and Visit Date/Specimen Collection Date.

Figure 3. Click the column header to sort in ascending (upward pointing arrow) or descending (downward pointing arrow) order

**Summary** **Detail** ⓘ

Site	Site Location	Facility	Year	Table	Schema Version	Edit Description	Total Count
[Redacted]	[Redacted]	[Redacted]	2024	Clinic	SV001	Date Patient Received Treatment for Gonococcal Infection [DATETX] has invalid date and/or date format (valid format YYYY/MM/DD).	32
			2024	Clinic	SV001	Patient's Other Medication [MEDICATION1_OTH] should be left blank (NULL) when the antimicrobial treatment for Gonorrhea [TRMT1] is not 77=Other.	32
			2024	Clinic	SV001	Visit Date [VISDATE] has invalid date and/or date format (valid format YYYY/MM/DD).	32
			2024	Clinic	SV001	Second Treatment for Gonorrhea [TRMT2] is invalid.	26
			2024	Lab	SV001	Date Isolate was Sent to ARLN Laboratory [DATESENTARLN] has invalid date and/or date format (valid format YYYY/MM/DD).	25
			2024	Lab	SV001	Lab Specimen Collection Date [SPEC_COLLECT_DATE] has invalid date and/or date format (valid format YYYY/MM/DD).	25
			2024	Lab	SV001	Local Public Health Laboratory Code [JURIS_PHL] is invalid.	25
			2024	Clinic	SV001	Date Patient Received Treatment for Gonococcal Infection [DATETX] cannot occur before Visit Date [VISDATE].	5
			2024	Lab	SV001	Date Isolate was Sent to ARLN Laboratory [DATESENTARLN] has invalid date and/or date format (valid format YYYY/MM/DD).	3
			2024	Clinic	SV001	Date Patient Received Treatment for Gonococcal Infection [DATETX] has invalid date and/or date format (valid format YYYY/MM/DD).	3
			2024	Lab	SV001	Lab Specimen Collection Date [SPEC_COLLECT_DATE] has invalid date and/or date format (valid format YYYY/MM/DD).	3
			2024	Lab	SV001	Local Public Health Laboratory Code [JURIS_PHL] is invalid.	3

Caution: PII Alert! Data may contain sensitive personally identifiable information (PII).

**Summary** **Detail** ⓘ

Site	Site Location	Facility	Year	Table	Schema Version	Edit Description	Total Count
[Redacted]	[Redacted]	[Redacted]	2024	Lab	SV001	Date Isolate was Sent to ARLN Laboratory [DATESENTARLN] has invalid date and/or date format (valid format YYYY/MM/DD).	1
			2024	Lab	SV001	Date Isolate was Sent to ARLN Laboratory [DATESENTARLN] has invalid date and/or date format (valid format YYYY/MM/DD).	1
			2024	Lab	SV001	Date Isolate was Sent to ARLN Laboratory [DATESENTARLN] has invalid date and/or date format (valid format YYYY/MM/DD).	1
			2024	Clinic	SV001	Date Patient Received Treatment for Gonococcal Infection [DATETX] has invalid date and/or date format (valid format YYYY/MM/DD).	1
			2024	Clinic	SV001	Date Patient Received Treatment for Gonococcal Infection [DATETX] has invalid date and/or date format (valid format YYYY/MM/DD).	1
			2024	Clinic	SV001	Date Patient Received Treatment for Gonococcal Infection [DATETX] has invalid date and/or date format (valid format YYYY/MM/DD).	1
			2024	Lab	SV001	Lab Specimen Collection Date [SPEC_COLLECT_DATE] has invalid date and/or date format (valid format YYYY/MM/DD).	1
			2024	Lab	SV001	Lab Specimen Collection Date [SPEC_COLLECT_DATE] has invalid date and/or date format (valid format YYYY/MM/DD).	1
			2024	Lab	SV001	Lab Specimen Collection Date [SPEC_COLLECT_DATE] has invalid date and/or date format (valid format YYYY/MM/DD).	1
			2024	Lab	SV001	Local Public Health Laboratory Code [JURIS_PHL] is invalid.	1
			2024	Lab	SV001	Local Public Health Laboratory Code [JURIS_PHL] is invalid.	1

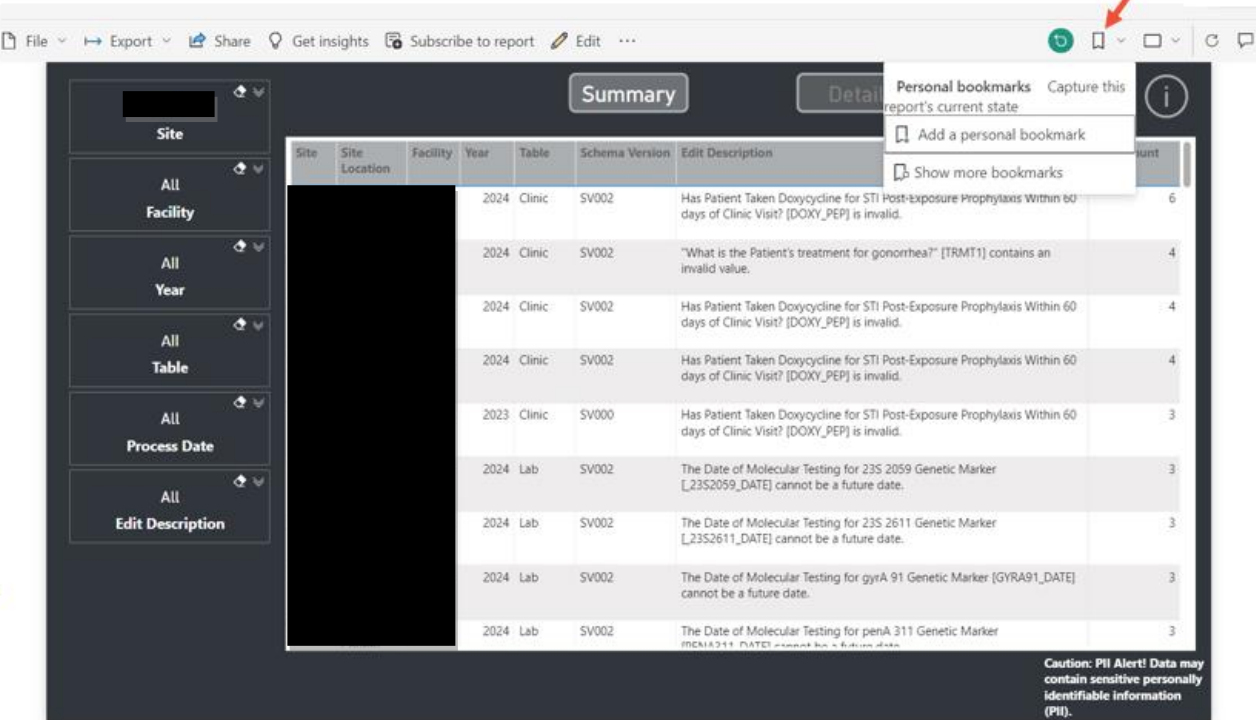
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### Adding personal bookmarks

In some cases (e.g. facilities associated with a specific site), users may benefit from using the personal bookmark functionality, which will save the current filter conditions and sort order for an individual user so that they can easily return to the dashboard with the exact parameters pre-set.

To add a bookmark, ensure all the desired filters and sort criteria are applied. Then click the “Bookmarks” (downward pointing arrow above the dashboard Help document ⓘ icon) menu and select “Add a personal bookmark” (Figure 4). It is recommended you give the bookmark a name and select Save. To update, rename, or delete your bookmark, select the ellipses next to the bookmark's name. Note: there are limitations to personal bookmarks. If major changes are made to the dashboard's structure or functionality, your personal bookmark may need to be updated to work properly.

*Figure 4. Click the Bookmark icon and select “Add a personal bookmark” to save specific filter and sort criteria that you can easily return to. In this figure, a bookmark already exists for “Congenital Syphilis”.*



The screenshot shows a dashboard with a sidebar on the left containing filters for Site, Facility, Year, Table, Process Date, and Edit Description. The main area displays a table with columns: Site, Site Location, Facility, Year, Table, Schema Version, Edit Description, and a count. A red arrow points to the 'Bookmarks' icon in the top right corner. A dropdown menu is open, showing options: 'Personal bookmarks', 'Capture this report's current state', 'Add a personal bookmark', and 'Show more bookmarks'.

Site	Site Location	Facility	Year	Table	Schema Version	Edit Description	
			2024	Clinic	SV002	Has Patient Taken Doxycycline for STI Post-Exposure Prophylaxis Within 60 days of Clinic Visit? [DOXY_PEP] is invalid.	6
			2024	Clinic	SV002	"What is the Patient's treatment for gonorrhea?" [TRMT1] contains an invalid value.	4
			2024	Clinic	SV002	Has Patient Taken Doxycycline for STI Post-Exposure Prophylaxis Within 60 days of Clinic Visit? [DOXY_PEP] is invalid.	4
			2024	Clinic	SV002	Has Patient Taken Doxycycline for STI Post-Exposure Prophylaxis Within 60 days of Clinic Visit? [DOXY_PEP] is invalid.	4
			2023	Clinic	SV000	Has Patient Taken Doxycycline for STI Post-Exposure Prophylaxis Within 60 days of Clinic Visit? [DOXY_PEP] is invalid.	3
			2024	Lab	SV002	The Date of Molecular Testing for 23S 2059 Genetic Marker [23S2059_DATE] cannot be a future date.	3
			2024	Lab	SV002	The Date of Molecular Testing for 23S 2611 Genetic Marker [23S2611_DATE] cannot be a future date.	3
			2024	Lab	SV002	The Date of Molecular Testing for gyrA 91 Genetic Marker [GYRA91_DATE] cannot be a future date.	3
			2024	Lab	SV002	The Date of Molecular Testing for penA 311 Genetic Marker [PEN311_DATE] cannot be a future date.	3

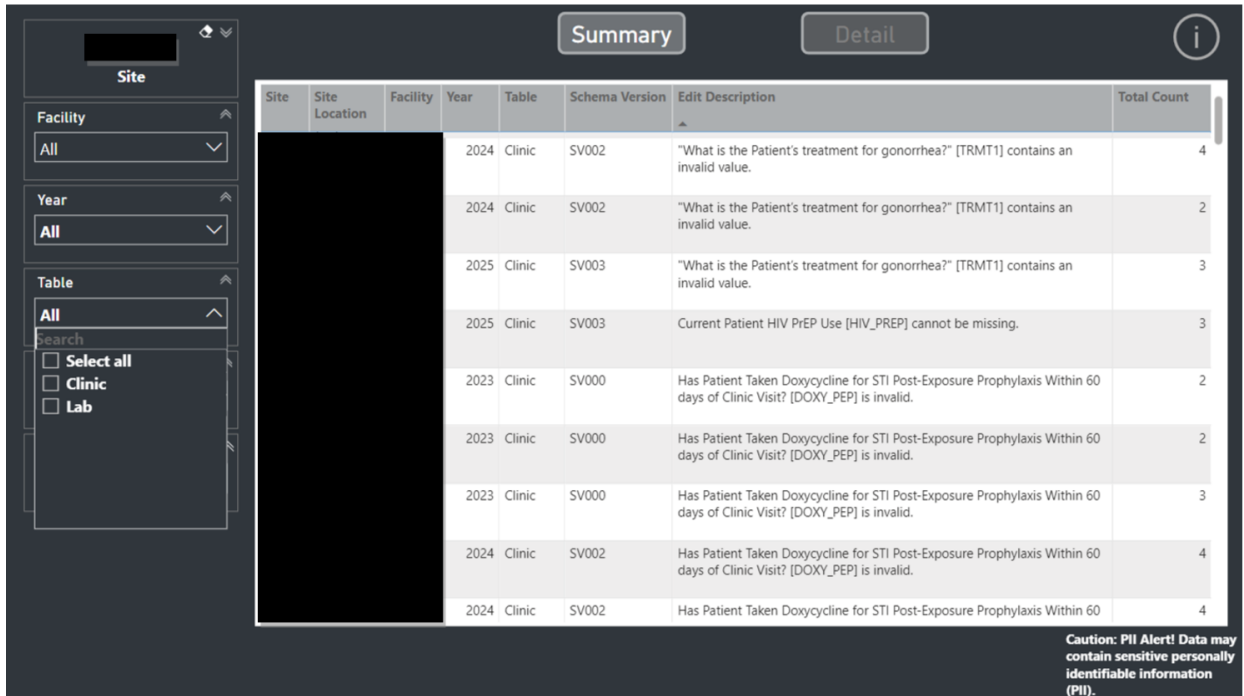
Caution: PII Alert! Data may contain sensitive personally identifiable information (PII).

## Comparing the dashboard pages

### Summary Page

This page displays a table summarizing the types and frequencies of edit checks by calendar year and the recorded CARGOS schema (or CSV file template) version, enabling users to see the magnitude of issues and prioritize edit checks for review and potential revision (Figure 5). In contrast to the Detail page, which displays line-listed edit checks, the Summary page can indicate recurring errors in the submission of certain fields as well as invalid values for variables that may have resulted from typographical errors.

Figure 5. Snapshot of the Summary Page



The screenshot shows a dashboard with a left sidebar containing filters for Site, Facility, Year, and Table. The main area displays a table of edit checks. The table has columns for Site, Site Location, Facility, Year, Table, Schema Version, Edit Description, and Total Count. The data is filtered to show only Clinic visits for the years 2023 and 2024. The table lists various edit checks related to gonorrhea treatment and doxycycline use, with their respective total counts.

Site	Site Location	Facility	Year	Table	Schema Version	Edit Description	Total Count
			2024	Clinic	SV002	"What is the Patient's treatment for gonorrhea?" [TRMT1] contains an invalid value.	4
			2024	Clinic	SV002	"What is the Patient's treatment for gonorrhea?" [TRMT1] contains an invalid value.	2
			2025	Clinic	SV003	"What is the Patient's treatment for gonorrhea?" [TRMT1] contains an invalid value.	3
			2025	Clinic	SV003	Current Patient HIV PrEP Use [HIV_PREP] cannot be missing.	3
			2023	Clinic	SV000	Has Patient Taken Doxycycline for STI Post-Exposure Prophylaxis Within 60 days of Clinic Visit? [DOXY_PEP] is invalid.	2
			2023	Clinic	SV000	Has Patient Taken Doxycycline for STI Post-Exposure Prophylaxis Within 60 days of Clinic Visit? [DOXY_PEP] is invalid.	2
			2023	Clinic	SV000	Has Patient Taken Doxycycline for STI Post-Exposure Prophylaxis Within 60 days of Clinic Visit? [DOXY_PEP] is invalid.	3
			2024	Clinic	SV002	Has Patient Taken Doxycycline for STI Post-Exposure Prophylaxis Within 60 days of Clinic Visit? [DOXY_PEP] is invalid.	4
			2024	Clinic	SV002	Has Patient Taken Doxycycline for STI Post-Exposure Prophylaxis Within 60 days of Clinic Visit? [DOXY_PEP] is invalid.	4

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## Detail Page

This page displays individual line-listed edit checks for a site (Figure 6), which can be filtered within the dashboard and/or downloaded in Excel file format as needed. Users may use the built-in tools for sorting, filtering, and exporting/downloading the data to review and potentially revise the line-listed clinic and/or lab data as needed.

Important: If you need to export a table with more than 150,000 rows of edit checks, please note you can only export a maximum of 150,000 rows at a time. See the next section, “Downloading data” for additional details.

Figure 6. Snapshot of the Detail Page

Match ID	CARGOS Specimen ID	Edit Description	Schema Version	Visit Date	Specimen Collection Date
101ABC702031312	-202409-015	The Date of Molecular Testing for 23S 2059 Genetic Marker [23S2059_DATE] (7/7/2024) cannot occur before the Date of Specimen Collection [SPEC_COLLECT_DATE] (9/7/2024).	SV002		9/7/2024
101ABC702031312	-202409-015	The Date of Molecular Testing for 23S 2611 Genetic Marker [23S2611_DATE] (9/13/2024) cannot be a future date.	SV002		9/7/2024
101ABC702031312	-202409-015	The Date of Molecular Testing for gyrA 91 Genetic Marker [GYRA91_DATE] (9/7/2024) cannot be a future date.	SV002		9/7/2024
101ABC702031312	-202409-015	The Date of Molecular Testing for penA 311 Genetic Marker [PENA311_DATE] (9/7/2024) cannot be a future date.	SV002		9/7/2024
101ABC702031312	-202409-015	The Date of Molecular Testing for penA 501 Genetic Marker [PENA501_DATE] (9/7/2024) cannot be a future date.	SV002		9/7/2024
101ABC702031312	-202409-015	The Date of Molecular Testing for penA 515 Genetic Marker [PENA515_DATE] (9/7/2024) cannot be a future date.	SV002		9/7/2024
101ABC702031312	-202409-015	The Date of Molecular Testing for penA 545 Genetic Marker [PENA545_DATE] (9/19/2024) cannot be a future date.	SV002		9/7/2024
101ABC702031312	-202409-015	The Date of Molecular Testing for por A Genetic Marker [PORA_DATE] (9/7/2024) cannot be a future date.	SV002		9/7/2024

Site: [Redacted]  
 All Facility  
 All Year  
 All Table  
 All Process Date  
 All Edit Description  
 All Patient ID  
 All Match ID

Page: [All]  
 Displayed Edit Count: 351  
 Displaying Edit Numbers: 1 - 237  
 Caution: PII Alert! Data may contain sensitive personally identifiable information (PII).

The following table compares the overall variables and filters included in the tables on the Summary and Detail pages and includes a description of each variable:

**Table-variable comparison**

Column Name	Description	Summary	Detail
<b>Site</b>	Funded CARGOS site sending line-listed clinic and lab data to CDC.	✓	✓
<b>Site Location</b>	Location of the site sending line-listed clinic and lab data to CDC.	✓	✓
<b>Facility</b>	Facility code that indicates where line-listed clinic and lab data originated.	✓	✓
<b>Year</b>	Calendar year in which patient visit and lab specimen collection took place.	✓	✓
<b>Table</b>	Indicates whether a record originated from a clinic or lab file.	✓	✓
<b>Patient ID</b>	Unique patient/person identification number assigned by the site.	×	✓
<b>Match ID</b>	Case ID found in the state surveillance system that corresponds to the patient's specimen/lab test result.	×	✓
<b>CARGOS Specimen ID</b>	Unique Specimen ID assigned by the site for the identification of lab records.	×	✓
<b>Edit Description</b>	Description of the edit check associated with the line-listed clinic and lab data.	✓	✓
<b>Schema Version</b>	CARGOS schema (or CSV file template) version used when submitting the line-listed clinic and lab data to CDC.	Variable	Variable
<b>Visit Date</b>	The date of the patient's visit to the clinic (relevant for clinic records).	×	✓
<b>Specimen Collection Date</b>	The date of collection of the specimen associated with the patient visit (relevant for lab records).	×	✓
<b>Process Time</b>	Most recent date and time that the line-listed records were received and processed by the CDC.	×	✓
<b>File Name</b>	The file name associated with the submission of the line-listed clinic or lab record.	×	✓
<b>Edit Number</b>	Row number assigned to line-listed clinic or lab edit checks based on the year and month of the data file, facility, patient ID/cargos specimen ID, and visit date/specimen collection date.	×	Variable
<b>Page Number</b>	Page assigned to each edit check on the basis of its edit (row) number where each page consists of a maximum of 150,000 rows.	×	Filter
<b>Total Count</b>	Total number of times an edit check has appeared in all line-listed clinic and lab records in the calendar year for the current Site and CARGOS schema (CSV file template) version.	Variable	×



## Downloading data

Data tables in either the Summary or Detail page may be downloaded in Excel file format. Before downloading data from the Detail page, please take note of whether the displayed edit count exceeds 150,000 rows of edit checks (the maximum number of rows that can be exported at a time). If the number exceeds 150,000, users will need to export the data in batches (of 150,000 rows), using the Page Number menu to navigate between separate batches.

To export the data table, follow the below instructions (Figure 7). Do NOT navigate to the “File” menu (“File” > “Download this File”) or to “Export” at the top of the dashboard; neither option will work.

- 1) Hover over the top-right corner of the table and click the “More options” menu indicated by the ellipsis symbol (...).
- 2) Select “Export Data”.
- 3) Select the option, “Data with current layout”, and click “Export”.
- a. Note: The file will automatically download to your browser’s default download folder with the filename ‘data’ in Excel (.xlsx) format with a 150,000-row maximum. It is recommended to rename and move the file to your default work folder so you can easily review and append files containing over 150,000 rows if necessary.


Figure 7. Navigate to the “More options” menu and select “Export data” to download the data. Be sure to select “Data with current layout”.

The screenshot shows a data table interface with a left sidebar containing filters for Site, Facility, Year, Table, Process Date, and Edit Description. The main table has columns: Site, Site Location, Facility, Year, Table, Schema Version, Edit Description, and an edit count column. A context menu is open over the table, showing options like Share, Add a comment, Export data (highlighted with a red circle), Show as a table, Spotlight, Get insights, Sort descending, Sort ascending, and Sort by. A caution message at the bottom right states: "Caution: PII Alert! Data may contain sensitive personally identifiable information (PII)."

Site	Site Location	Facility	Year	Table	Schema Version	Edit Description	
			2023	Clinic	SV000	"What is the Patient's treatment for gonorrhea?" [TRMT1] invalid value.	
			2023	Clinic	SV000	"What is the Patient's treatment for gonorrhea?" [TRMT1] invalid value.	
			2024	Clinic	SV002	"What is the Patient's treatment for gonorrhea?" [TRMT1] invalid value.	
			2024	Clinic	SV002	"What is the Patient's treatment for gonorrhea?" [TRMT1] invalid value.	
			2025	Clinic	SV003	"What is the Patient's treatment for gonorrhea?" [TRMT1] contains an invalid value.	3
			2025	Clinic	SV003	Current Patient HIV PrEP Use [HIV_PREP] cannot be missing.	3
			2023	Clinic	SV000	Has Patient Taken Doxycycline for STI Post-Exposure Prophylaxis Within 60 days of Clinic Visit? [DOXY_PEP] is invalid.	2
			2023	Clinic	SV000	Has Patient Taken Doxycycline for STI Post-Exposure Prophylaxis Within 60 days of Clinic Visit? [DOXY_PEP] is invalid.	2
			2023	Clinic	SV000	Has Patient Taken Doxycycline for STI Post-Exposure Prophylaxis Within 60 days of Clinic Visit? [DOXY_PEP] is invalid.	3


Which data do you want to export?

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more about exporting data](#)

☒



**Data with current layout**

Export this data in the same layout you see now, but without any icons, colors, or other formatting you added.

☐


**Summarized data**

Export the summarized data used to create your visual (for example, sums, averages, and medians).

☐


**Underlying data**

☐ Visual does not have aggregates or measures

File format:

.xlsx (Excel 150,000-row max)▼

Export Cancel

## Data considerations

This dashboard, which is updated weekly, displays edit checks for line-listed clinic and lab CARGOS data that have been identified by CDC as needing review and potential revision. Only unaddressed edit checks from the calendar years in progress and for a user's own site will be displayed. When the edit checks for affected records are addressed and line-listed clinic and lab data are resubmitted to the CDC, the associated edit checks should no longer appear in the dashboard upon the next weekly update.

Questions related to dashboard technical issues (e.g. questionable displays with the dashboard, dashboard access issues, information gaps in the help document), data errors (e.g. records flagged for edit checks when they are not warranted), as well as feedback on dashboard design and features, should be sent to [cargos@cdc.gov](mailto:cargos@cdc.gov) (copying [dstdp\\_dashboards@cdc.gov](mailto:dstdp_dashboards@cdc.gov)).