### **Data Migration into DARIA**

**Overview**

This process is for bringing historical data into the DARIA system from a previous system. It allows the fund to access recent patient data for patients who are still working with the fund to receive care. We have found that a new DARIA fund should migrate a minimum of 6 weeks of data, which ensures most of the active patients are accounted for. You may want to migrate more data if patients have a longer engagement with your fund, or if you want more complete data for the fiscal year.

We assume here that you have compared how you keep track of patient data to how DARIA keeps track, and know how to make things correspond.

Data migration is a manual process using a custom data entry form within DARIA. Funds should migrate data as close to the go-live date as possible. Plan to have a team of volunteers in your fund complete the migration. One person should be able to migrate approximately 200 patients over a weekend.

We suggest breaking this down as follows:

\* Determine how much data to migrate (suggestion: current fiscal year or calendar year; a minimum of six weeks)

\* Recruit data entry volunteers, planning for 1 volunteer per 200 patients for 2 days of data entry

\* For multiple volunteers, break out data by volunteer to ensure no patient duplication

### **Instructions for using the data migration form tool:**

(This will be mostly copying and pasting data from the previous system into the corresponding fields in DARIA. We have created a useful data entry form (**YOUR\_URL**/data\_entry) to help this go faster so just copy/paste, copy/paste, copy/paste... well, you get the picture.)

1. Log in as normal
2. Go to **YOUR\_URL**/data\_entry
3. Enter the patient information from the spreadsheet, except for notes,external pledges, practical support data, and fulfillment data, and hit submit
4. Manually add the notes, call log, external pledges, practical support, and fulfillment data. (This patient is now considered entered for our purposes here.)
   1. In the 'Notes' tab: Copy text from "Comments & Patient Story" to the text box, if applicable.
   2. In the ‘Call Log’ tab: Click on the 'Record new call' link. Select option that matches 'Status' cell in spreadsheet.
   3. In the ‘Abortion Information’ tab: Enter in External Pledges, our term for contributions from other funds, if applicable.
   4. In the ‘Practical Support’ tab: Enter in any Practical Support information for that patient, if applicable.
   5. In the ‘Fulfillment’ tab: If the patient has a sent pledge, enter in the pledge payout information for this patient, if applicable. Note that this tab won’t be visible if the patient doesn’t have a sent pledge.
5. Navigate back to **YOUR\_URL**/data\_entry
6. Repeat until complete