



2020 Homecare Provider Integration Import Guide (PA)

October 2020

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Document Revision History

Date	Description of Revision
11/05/2019	Initial version of the document
1/31/2020	Updates to EDI Validator Tool screen
4/10/2020	Updates to Service Location Description/Format
8/3/2020	Updates to the EDI Import Interface requirements
10/12/2020	EDI Import Interface requirements – table moved to EDI Code Table Guide

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Introduction

The **HHAeXchange (HHAX) Homecare Import Interface Guide** provides guidance and instructions in preparing files for *importing* from an SFTP system or directly into the HHAX system. Herein users find the various interface templates indicating required fields and proper format for a successful import.

This guide is updated on an ongoing basis as system capacities are implemented and additional functionality becomes available.

Audience

This guide is intended for System Users responsible in the EDI importing process at a Client Agency.

EDI Assistance

If additional assistance is needed, please submit a ticket to EDISupport@hhaexchange.com. Cases are escalated to the EDI Production Support queue. An available Support Team Members will contact you directly to assist.

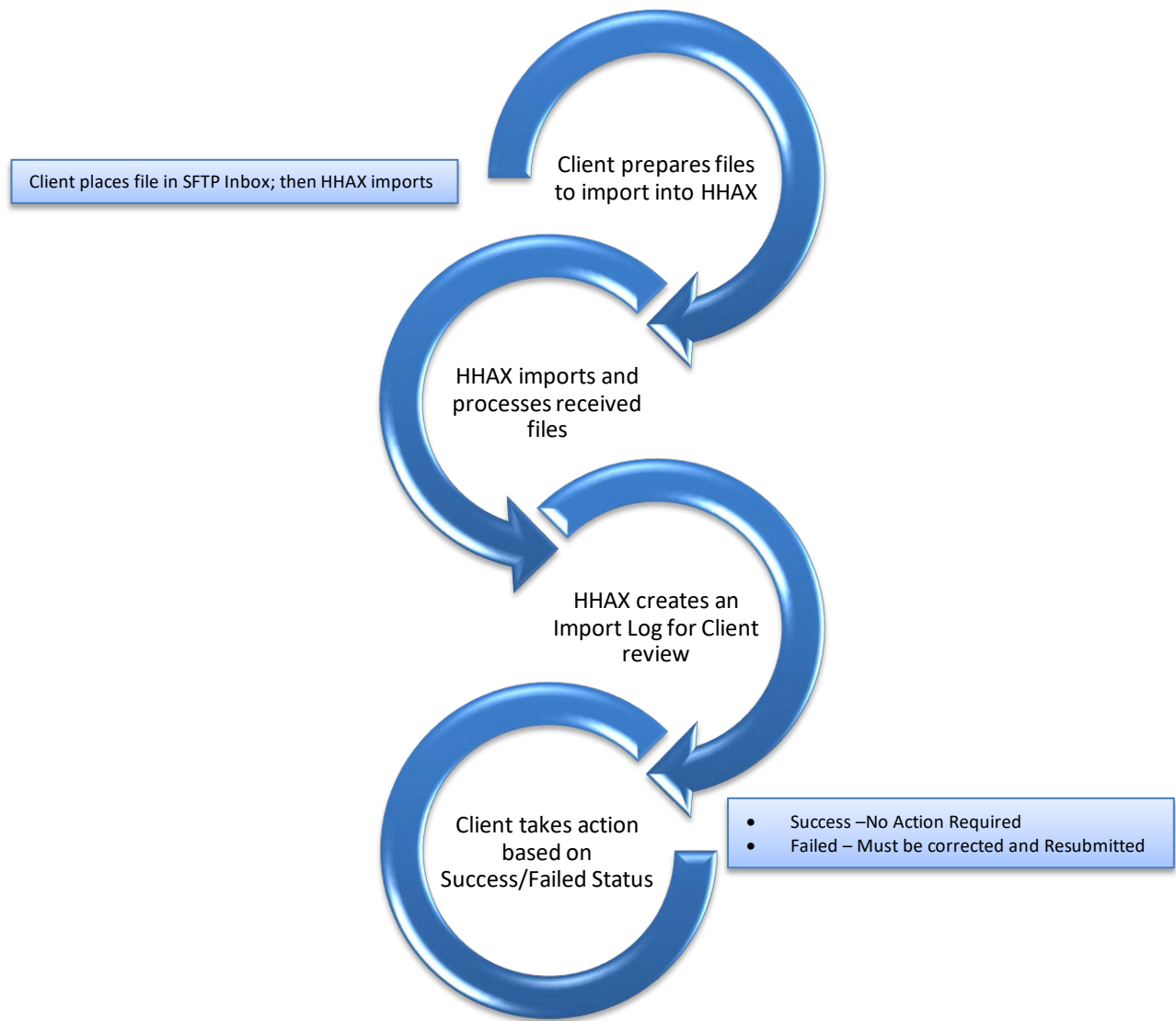
Understanding the EDI Process

What is EDI?

Electronic Data Interchange (EDI) is the electronic interchange of business information using a standardized format; a process which allows one company to send information to another company electronically rather than with paper. Business entities conducting business electronically are called trading partners.

Import Process Flow

Client Agencies place a file in the SFTP Inbox to interchange data with HHAX. The image below illustrates the high-level process flow currently in place.




EDI Process Flow

SFTP & File Requirements

Users need a Secure FTP client software to access their HHAX SFTP account. Any standard SFTP client software should be able to connect to the HHAX SFTP (such as *Filezilla*, *CuteFTP*, and *WINSCP*).

HHAX provides SFTP credentials once an Agency has validated their file format.

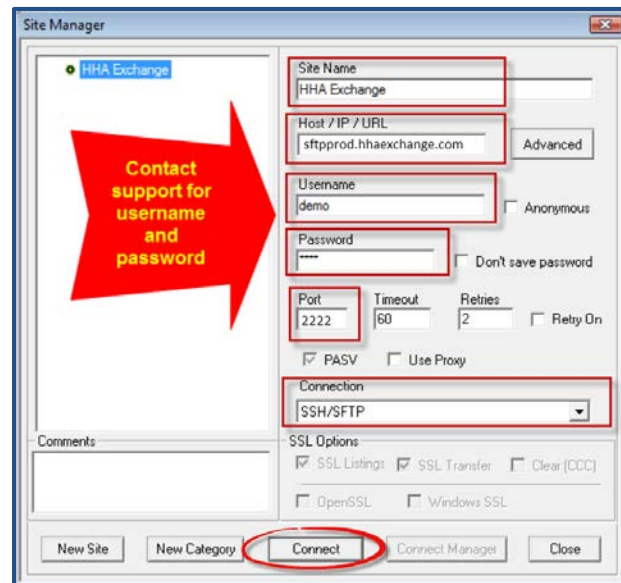


HHAExchange does not endorse or technically support any particular 3rd Party software. Some examples and images used within this document are exclusively for demonstration purposes.

SFTP Client Configuration Requirements

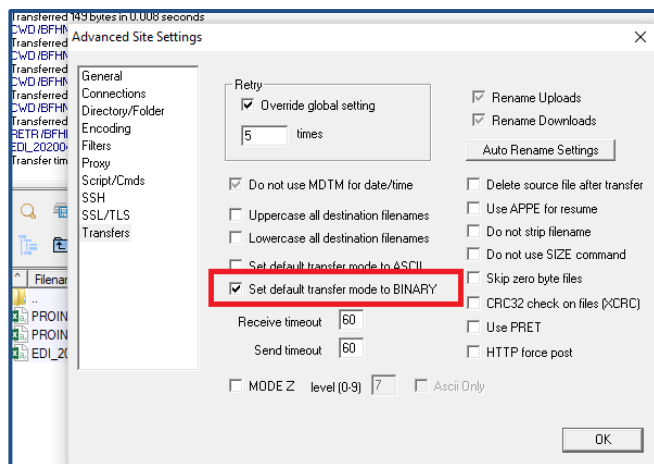
The image to the right illustrates the configuration requirements to connect to the SFTP location.

- HOST/IP/URL:
sftpprod.hhaexchange.com
- Username: **Enter the Username received from HHAExchange**
- Password: **Enter the password received from HHAExchange**
- Port: **2222**
- Connection: **SSH/SFTP**



SFTP Configuration Settings (Sample SFTP Application)

When transferring files via SFTP, select the **BINARY mode** in your FTP client application (sample from sample SFTP application shown to right).



Binary Mode in Advanced Settings (Sample)

HHAX Homecare Import Interface File Information File Name and Frequency

Interface	SFTP Location	File Name	Frequency (SFTP Import Only)
EDI Import	Inbox	EDI_AgencyTaxID_YYYYMMDDHHMMSS.CSV	As/when desired by Client

Note: To minimize errors and ensure system processes are running efficiently, HHAX requests for Agencies to upload the entire file (ALL records starting from go-live date) only on the initial load (first time). Thereafter, all future import files should only contain incremental changes.

Required Components for Successful Import

The below-listed components are required when importing files to HHAX. Although these components are the essential requirements, there are some variations depending on the type of data Users are exporting/importing. This section covers each of the required components with the necessary tools and information to assist with the data interchange process.

- Naming Convention and File Extension (.csv)
- Required Fields must be completed
- File Format Template

Naming Convention & File Extension

The table below indicates the File type and the File Name (as per naming convention) for files imported and processed by HHAX. This naming convention is applicable to all import files, as noted in the table below.

Naming Convention Requirements	
File Type	File Name
EDI Import	EDI_AgencyTaxID_YYYYMMDDHHMMSS.CSV

To elaborate, the following example explains the naming convention:

If Tax ID is “9876543210” and the file is generated on 07/31/2018 at 8:00 AM, the file name is:

File Name: **EDI_9876543210_2018073180000.CSV**

EDI = Hardcoded

9876543210 = Agency Tax ID

20180731 = Date in YYYYMMDD format

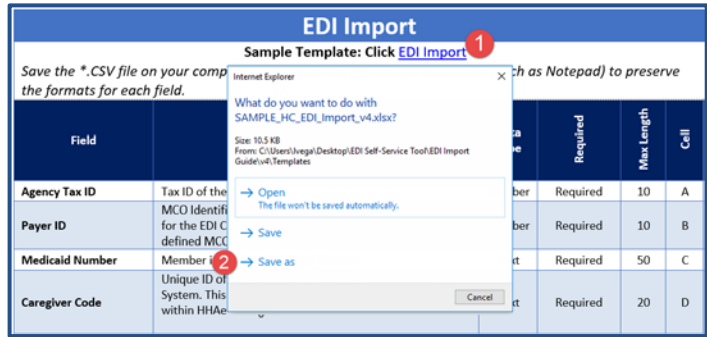
080000 = Time Stamp in HHMMSS format

All files must be saved as a “.csv” (extension) file. The system is not able to process or convert any other type of data file.

Saving Sample Templates to a Workstation

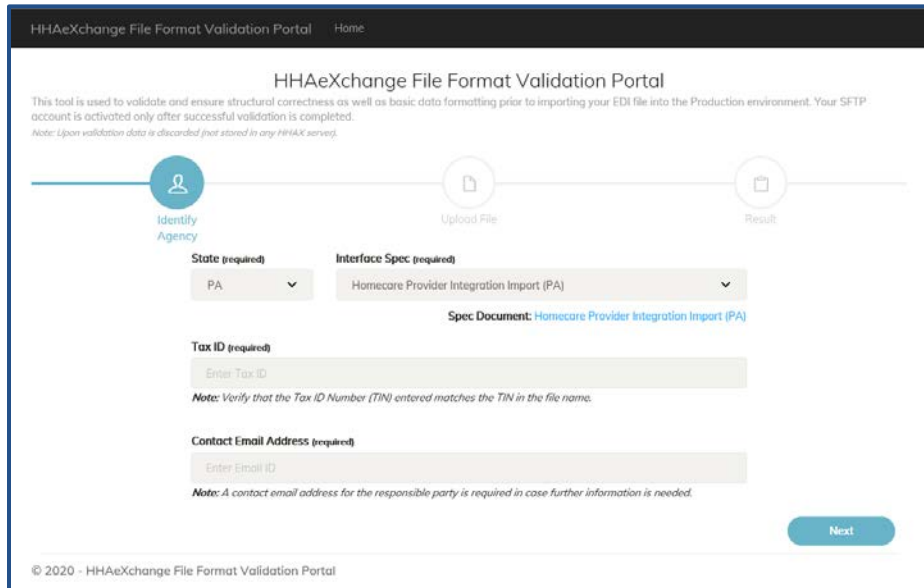
By default, these files open in Excel, which may alter the format of certain fields. To maintain the integrity of the sample templates and formats, HHAX strongly recommends that these templates be saved on a User's workstation first using the following steps:

Step	Action
1	Click on the desired Template link.
2	Select Save As and save as a *.csv file onto the workstation when prompted by the system.
3	To open the file from the workstation, select Open With and select a tabbed text editor (such as Notepad ++). This preserves the formats for each field.



Validating the File Format

Upon creating an import file, navigate to the [HHAX File Format Validation Portal](https://edi.hhaexchange.com/) (<https://edi.hhaexchange.com/>) to validate and ensure the structural correctness and formatting requirements. For instructions, refer to the [EDI File Format Validation Portal Job Aid](#).



EDI Import Interface - Required Fields and Formats

As with the Naming Convention, there are required fields per file document which must be in specific format. This EDI Import Interface supports the following import operations into HHAX; click corresponding link to access a sample file.

1. [Schedule Import](#)
2. [Confirmed Visits Import](#)
3. [Billed Visits Import](#)
4. [Missed Visits Import](#)
5. [Delete a Schedule](#)

Note: Schedule is only deleted if a Visit is not billed in HHAX via the overnight billing process.

Refer to the **Required Fields by Import File Type** section in the applicable (regional) *EDI Code Table Guide* for the set of required fields for each of the above-listed import file types.

EDI Import

Refer to the layout below when creating the Integration Import file. Please contact HHAX Technical Support to obtain a copy of the *EDI Code Table Guide*, specific your Payer(s). This guide contains valid values for certain EDI import fields as indicated below.

IMPORTANT

Pennsylvania’s Office of Long-Term Living (OLTL) has designated that Service Codes **W1793** (Personal Assistance Services -PAS) and **T1005** (Respite Agency) require EVV. As a result, certain data elements in the specification below are required to determine EVV compliance. All fields that are required for EVV reporting for service codes W1793 and T1005 are labeled with “Required for EVV Mandate” in the Description column. This supersedes the value in the Required column for all EVV service codes

These fields are used by the State when evaluating compliance with the 21st Century Cures Act (Cures Act) regulations. The Cures Act mandates that states require EVV use for Medicaid-funded Personal Care Services (PCS) and Home Health Care Services (HHCS) for in-home visits by a provider. For further information, please consult with your states’ specific compliance requirements regarding the Cures Act.

EDI Import					
Sample Template: Click EDI Import					
Save the *.CSV file on your computer, and Open the file using a text editor (such as Notepad) to preserve the formats for each field. Refer to the Saving Sample Templates to a Workstation section.					
Field	Description	Data Type	Required	Max Length	Cell
Agency Tax ID	Tax ID of the Agency	Number	Required	10	A
Payer ID	Unique MCO/Payer Identifier. <ul style="list-style-type: none"> • Refer to the values defined in the EDI Code Table Guide. 	Number	Required	10	B
Medicaid Number	Member identifier - Medicaid Number	Text	Required	50	C

EDI Import

Sample Template: Click [EDI Import](#)

Save the *.CSV file on your computer, and Open the file using a text editor (such as Notepad) to preserve the formats for each field. Refer to the [Saving Sample Templates to a Workstation](#) section.

Field	Description	Data Type	Required	Max Length	Cell
Caregiver Code	<p>Unique ID of the Caregiver in Agency's Management System. This value is mapped to Alt Caregiver Code field within HHAExchange.</p> <p>The predefined value "TEMP" can be included to indicate that there is no Caregiver currently assigned to a schedule. This is allowed only if the visit is not yet verified.</p>	Text	Required	20	D
Caregiver First Name	<p>Required for EVV Mandate Caregiver's First Name</p>	Text	Required	50	E
Caregiver Last Name	<p>Required for EVV Mandate Caregiver's Last Name</p>	Text	Required	50	F
Caregiver Gender	<p>Possible Values: M (Male) or F (Female)</p> <ul style="list-style-type: none"> If the value is empty, then the HHAX system takes "M" for the Gender when creating a Caregiver. HHAX recommends sending data in this field. If the Caregiver already exists in the HHAX system, and the value is empty, then the existing Gender value remains. If the value is not empty, Caregiver Gender is overwritten in HHAX. 	Text	Optional	1	G
Caregiver Date of Birth	<p>Format: YYYY-MM-DD</p> <ul style="list-style-type: none"> If the value is empty, then '1901-01-01' is loaded into this field in Caregiver Profile when creating a Caregiver. If the Caregiver already exists in the HHAX system and the value is empty, then the existing Date of Birth value remains. If the value is not empty, Caregiver Date of Birth is overwritten in HHAX. 	Date	Optional	10	H
Caregiver SSN	<p>Required for EVV Mandate Social Security Number</p> <ul style="list-style-type: none"> Format: XXX-XX-XXXX; OR Format: 000-0X-XXXX if providing the last 5 digits of the Caregivers SSN. 	Text	Required	11	I
Schedule ID	<p>Unique Schedule ID in Agency's Management System.</p>	Text	Required	50	J
Procedure Code	<p>Billing Service Code</p> <ul style="list-style-type: none"> If the schedule already exists in HHAX, the Billing Service Code is overwritten (<i>if Visit is not billed in HHAExchange</i>). Refer to the values defined in the EDI Code Table Guide. 	Text	Required	50	K
Schedule Start Time	<p>Schedule Start Time - YYYY-MM-DD HH:MM as per Agency's Timezone</p> <p>If the schedule already exists in HHAExchange, the Schedule Start Time is overwritten (<i>if visit is not billed in HHAExchange</i>).</p>	Date /Time	Required	16	L

EDI Import

Sample Template: Click [EDI Import](#)

Save the *.CSV file on your computer, and Open the file using a text editor (such as Notepad) to preserve the formats for each field. Refer to the [Saving Sample Templates to a Workstation](#) section.

Field	Description	Data Type	Required	Max Length	Cell
Schedule End Time	Schedule End Time - YYYY-MM-DD HH:MM as per Agency's Timezone If the schedule already exists in HHAExchange, the Schedule End Time is overwritten (<i>if visit is not billed in HHAExchange</i>).	Date /Time	Required	16	M
Visit Start Time	When Required: When Confirmed Visit (EVV or manual) is provided. Visit Start Time - YYYY-MM-DD HH:MM as per Agency's Timezone <ul style="list-style-type: none"> If a value is provided in this field, then the schedule is confirmed with the start time provided. This field should have a value if the "EVV Start Time" is not empty. If the value is empty, then the existing Visit Start Time value in HHAX is removed. This field can be used for billing purposes. 	Date /Time	Situational	16	N
Visit End Time	When Required: When Confirmed Visit (EVV or manual) is provided. Visit End Time - YYYY-MM-DD HH:M as per Agency's Timezone <ul style="list-style-type: none"> If a value is provided in this field, then the Schedule is confirmed with the End Time provided. If the value is empty, then the existing Visit End Time value in HHAX is removed. This field can be used for billing purposes. 	Date /Time	Situational	16	O
EVV Start Time	Required for EVV Mandate When Required: If "Visit Start Time" and "Visit End Time" is provided via EVV EVV time Format: YYYY-MM-DD HH:MM as per Agency's Timezone <ul style="list-style-type: none"> If a value is provided in this field, then the Visit Start Time is marked as confirmed via EVV; otherwise, it is considered manually confirmed. If the value is empty, then the existing EVV Start Time value in HHAX is removed. Note: EVV time should not be rounded.	Date/ Time	Situational	16	P
EVV End Time	Required for EVV Mandate When Required: If "Visit Start Time" and "Visit End Time" is provided via EVV EVV time Format: YYYY-MM-DD HH:MM as per Agency's Timezone <ul style="list-style-type: none"> If value is provided in this field, then the Visit End Time is marked as confirmed via EVV; otherwise, it is considered manually confirmed. If the value is empty, then the existing EVV End Time value in HHAX is removed. Note: EVV time should not be rounded.	Date /Time	Situational	16	Q
Service Location	Required for EVV Mandate	Text	Situational	100	R

EDI Import

Sample Template: Click [EDI Import](#)

Save the *.CSV file on your computer, and Open the file using a text editor (such as Notepad) to preserve the formats for each field. Refer to the [Saving Sample Templates to a Workstation](#) section.

Field	Description	Data Type	Required	Max Length	Cell
	<p>When Required: If “Visit Start Time” and “Visit End Time” is provided. Not required when Visit is only scheduled.</p> <p>Format: Address 1 Address 2 City State Zip Physical location where the service was rendered.</p> <ul style="list-style-type: none"> If the value is empty, then the existing Service Location value in HHAX is removed. 				
Duties	<p>Pipe () separated list of the duties; for example: 016 021 023 027 Duty codes can be prefixed by an asterisk (“*”) to indicate that the task was attempted but refused by the Member. e.g. 016 *021 023</p> <ul style="list-style-type: none"> If a value is provided in this field, then the Visit is confirmed with duties. A value in this field is ignored if the “Visit End Time” is empty. If the value is empty, then the existing Duties value in HHAX is removed. Refer to the values defined in the EDI Code Table Guide. 	Text	Optional	1000	S
Clock-In Phone Number	<p>Required for EVV Mandate</p> <p>When Required: If “Visit Start Time” is provided and confirmed by IVR Caller ID -</p> <ul style="list-style-type: none"> If a value is provided in this field, then it is considered an IVR confirmation and this phone number is imported into HHAExchange. If the value is empty, then the existing Clock-In Phone Number value in HHAX is removed. 	Number	Situational	10	T
Clock-In Latitude	<p>Required for EVV Mandate</p> <p>When Required: If “Visit Start Time” is provided and confirmed by GPS Latitude -</p> <ul style="list-style-type: none"> If a value is provided in this field, then it is considered a GPS confirmation and the Latitude is imported into HHAX. If the value is empty, then the existing Clock-In Latitude value in HHAX is removed. 	Text	Situational	50	U
Clock-In Longitude	<p>Required for EVV Mandate</p> <p>When Required: If “Visit Start Time” is provided and confirmed by GPS Longitude -</p> <ul style="list-style-type: none"> If a value is provided in this field, then it is considered a GPS confirmation and the Longitude is imported into HHAX. If the value is empty, then the existing Clock-In Longitude value in HHAX is removed. 	Text	Situational	50	V
Clock-In EVV Other Info	<p>Required for EVV Mandate</p> <p>When Required: If “Visit Start Time” is provided and confirmed by any other EVV method.</p>	Text	Situational	25	W

EDI Import

Sample Template: Click [EDI Import](#)

Save the *.CSV file on your computer, and Open the file using a text editor (such as Notepad) to preserve the formats for each field. Refer to the [Saving Sample Templates to a Workstation](#) section.

Field	Description	Data Type	Required	Max Length	Cell
	<ul style="list-style-type: none"> If a value is provided in this field, this information is imported into HHAX. If the value is empty, then the existing Clock-In EVV Other Info value in HHAX is removed. 				
Clock-Out Phone Number	<p>Required for EVV Mandate When Required: If "Visit End Time" is provided and confirmed by IVR Caller ID</p> <ul style="list-style-type: none"> If a value is provided in this field, then it is considered an IVR confirmation and this phone number is imported into HHAX. If the value is empty, then the existing Clock-Out Phone Number value in HHAX is removed. 	Number	Situational	10	X
Clock-Out Latitude	<p>Required for EVV Mandate When Required: If "Visit End Time" is provided and confirmed by GPS Latitude -</p> <ul style="list-style-type: none"> If a value is provided in this field, then it is considered a GPS confirmation and the Latitude is imported into HHAX. If the value is empty, then the existing Clock-Out Latitude value in HHAX is removed. 	Text	Situational	50	Y
Clock-Out Longitude	<p>Required for EVV Mandate When Required: If "Visit End Time" is provided and confirmed by GPS Longitude -</p> <ul style="list-style-type: none"> If a value is provided in this field, then it is considered a GPS confirmation and the Latitude is imported into HHAX. If the value is empty, then the existing Clock-Out Longitude value in HHAX is removed. 	Text	Situational	50	Z
Clock-Out EVV Other Info	<p>Required for EVV Mandate When Required: If "Visit End Time" is provided and confirmed by any other EVV method.</p> <ul style="list-style-type: none"> If a value is provided, then this information is imported into HHAX. If the value is empty, then the existing Clock-Out EVV Other Info value in HHAX is removed. 	Text	Situational	25	AA
Invoice Number	<p>When Required: If Billed Visit Invoice number in Agency's Management System.</p> <ul style="list-style-type: none"> If a value is provided in this field, it is considered a Billed Visit in the Agency Management System. This invoice number is imported into HHAX and the Visit is billed in HHAX via the overnight process. If the value is empty, then the existing Invoice Number value in HHAX is removed. 	Text	Situational	18	AB
Visit Edit Reason Code	<p>When Required: If Visit is manually edited.</p>	Number	Situational	3	AC

EDI Import

Sample Template: Click [EDI Import](#)

Save the *.CSV file on your computer, and Open the file using a text editor (such as Notepad) to preserve the formats for each field. Refer to the [Saving Sample Templates to a Workstation](#) section.

Field	Description	Data Type	Required	Max Length	Cell
	<ul style="list-style-type: none"> If the value is empty, then the existing Reason value in HHAX remains. Refer to the values defined in the EDI Code Table Guide. 				
Visit Edit Action Taken	<p>When Required: If Visit is manually edited.</p> <ul style="list-style-type: none"> If the value is empty, then the existing Action Taken value in HHAX remains. Refer to the values defined in the EDI Code Table Guide. 	Number	Situational	2	AD
Notes	<p>Free Text Notes - Data in this field is imported as Visit Notes.</p> <ul style="list-style-type: none"> If the value is empty, then the existing Notes value in HHAX remains. A Note may be required by the Payer when Missed Visit = "Y". Refer to the EDI Code Table Guide (Missed Visit Code Tables section) for further details. 	Text	Optional	500	AE
Is Deletion	<p>Possible Values: Y (Yes) or N (No)</p> <ul style="list-style-type: none"> An empty value is considered as "N". Ignored if the Visit is confirmed and claim is billed. If the value is "Y", then the Visit is deleted from HHAX if not billed. Visit is identified based on Schedule ID and Medicaid Number. 	Text	Optional	1	AF
Invoice Line Item ID	<p>Unique identifier of the invoice line item in the 3rd party system.</p> <p>Note: This field should be left blank unless vendor is specifically requested by HHAX to provide this information.</p>	Text	Optional	30	AG
Missed Visit	Leave blank. Refer to Missed Visit spec	Text	Optional	1	AH
Missed Visit Reason Code	Leave blank. Refer to Missed Visit spec	Number	Optional	3	AI
Missed Visit Action Taken Code	Leave blank. Refer to Missed Visit spec	Number	Optional	2	AJ
Timesheet Required	<p>Possible Values: Y (Yes) or N (No)</p> <ul style="list-style-type: none"> An empty value is considered as "N". If the value is "Y", then the Duty Sheet is marked as Timesheet Required. If the value is empty, then the existing value of Timesheet Required in HHAExchange is removed. 	Text	Optional	1	AK
Timesheet Approved	<p>Possible Values: Y (Yes) or N (No)</p> <ul style="list-style-type: none"> An empty value is considered as "N". If the value is "Y", then the Duty Sheet is marked as Timesheet Approved. If the value is empty, then the existing value of Timesheet Approved in HHAX is removed. 	Text	Optional	1	AL
User Field 1	Agency Office NPI	Text	Optional	20	AM

EDI Import

Sample Template: Click [EDI Import](#)

Save the *.CSV file on your computer, and Open the file using a text editor (such as Notepad) to preserve the formats for each field. Refer to the [Saving Sample Templates to a Workstation](#) section.

Field	Description	Data Type	Required	Max Length	Cell
User Field 2	Reserved for EVV Mandate Employee Registry ID. unique employee (Caregiver) registered ID with the State	Text	Optional	6	AN
User Field 3	Reserved for EVV Mandate Employee Email Caregiver email address Note: if blank, then HHAX sends default value of missingemail@altev.ddd .	Text	Optional	100	AO
User Field 4	Required for EVV Mandate Visit edit made by When Required: If a Visit is manually edited. Visit edits require the unique identifier of the user, system, or process that made the edit to the Visit. Note: if blank, then HHAX sends default value of "Agency User".	Text	Situational	100	AP
User Field 5	Field in layout for future use Always empty	Text	Optional	500	AQ

Notes:

- **Optional** fields are not required. **Situational** fields are dependent on other fields and may be required according to the information in another field.
- The last row is considered the latest data and is reflected in HHAExchange as such. This means values received in the latest record overrides the data in HHAExchange.
- The **Schedule Start Time** and **Schedule End Time** is updated with **Visit Start Time** and **Visit End Time** values if those fields have data in the file.