
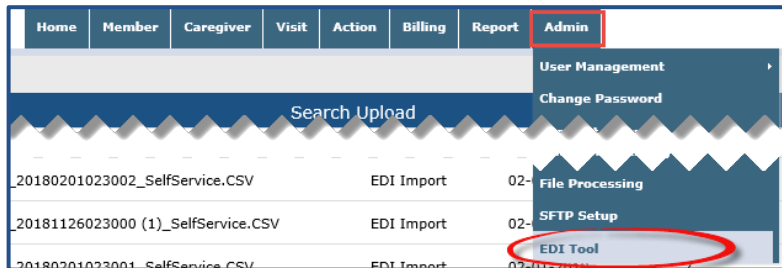


# EDI Tool Job Aid

 This functionality is enabled by HHAX System Administration. Please contact the [HHAX Support Team](#) for further assistance.

The **EDI Tool** allows users to transfer electronic data directly into the HHAExchange (HHAX) system without the use of an FTP/SFTP application. In addition, the tool allows users to correct failed records directly on the screen further streamlining the process. This job aid provides a high-level view of navigation and basic functions of the EDI tool.

To access the EDI Tool, navigate to **Admin > EDI Tool**.



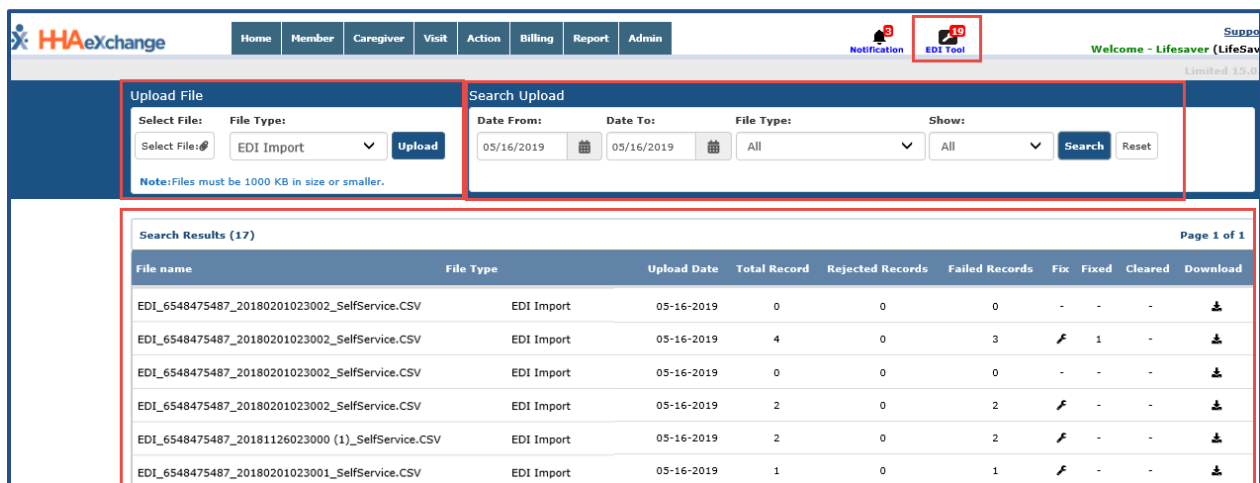
Accessing the EDI Tool

The **EDI Tool** icon in the notification section (top of the screen, seen in the image below) provides a count of failed records. Click the icon to access the EDI Tool.

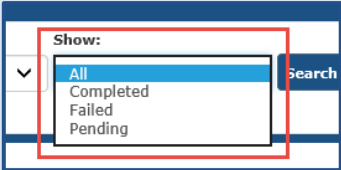


## EDI Tool Main Screen

The **EDI Tool** main screen is comprised of 3 sections including: **Upload File**, **Search Upload**, and **Search Results** (illustrated in the image below and described in the table underneath).


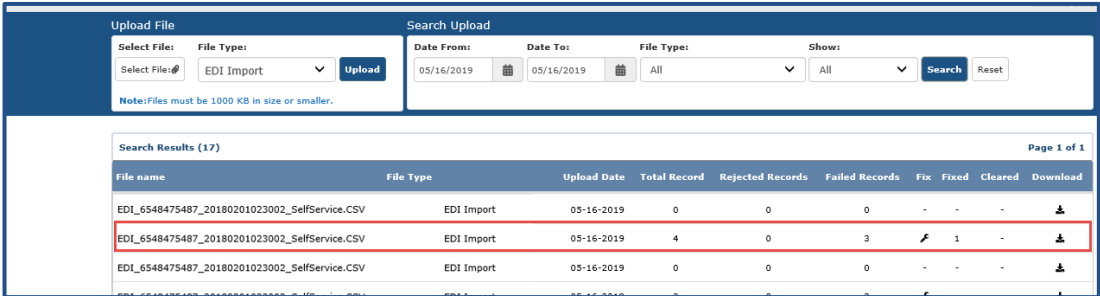



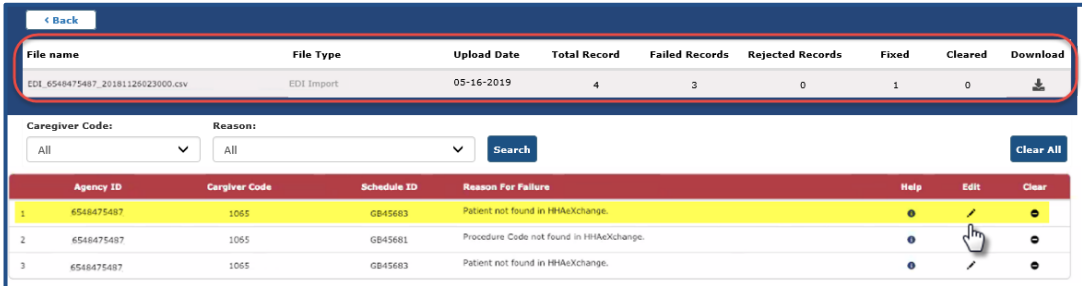
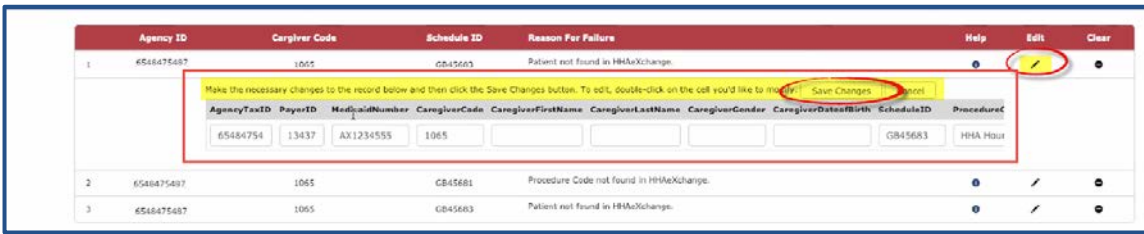


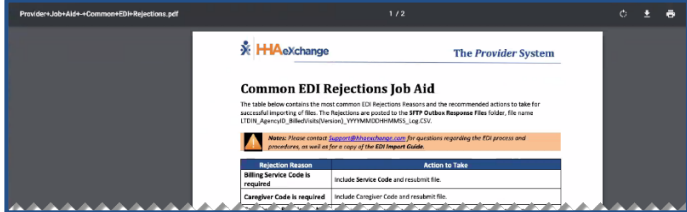
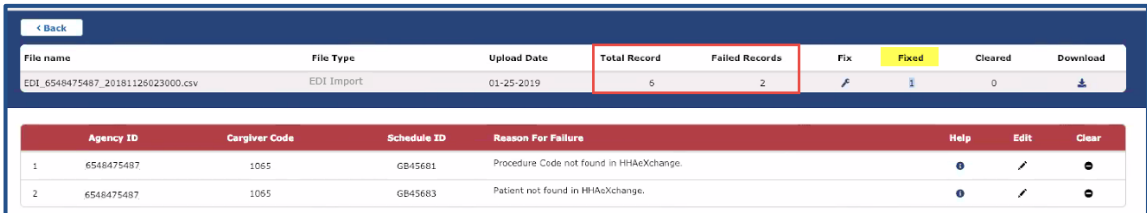
EDI Tool Main Screen


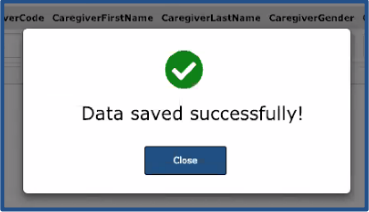
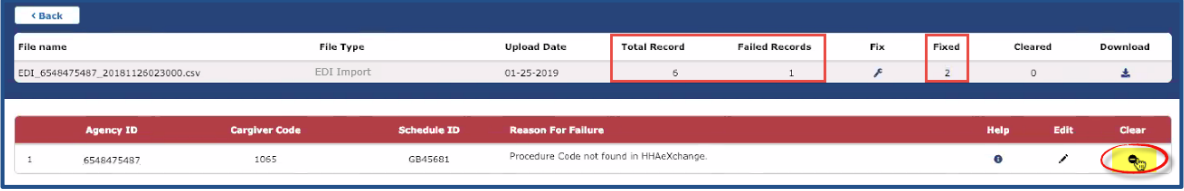
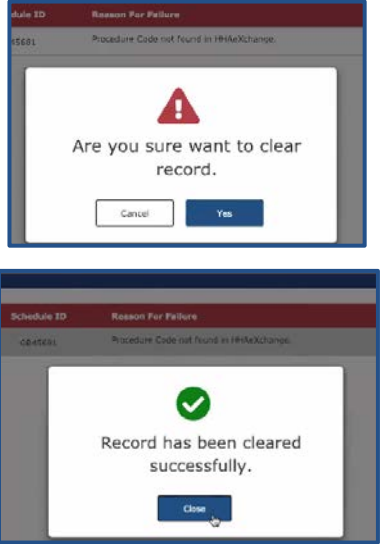
Section	Description																						
Upload File	Used to upload/import a file into HHAX. Refer to the <a href="#">EDI Import Guide</a> for naming convention standards.																						
Search Upload	<p>Select search filters to locate specific upload(s): <b>To/From Date</b>, <b>File Type</b>, and <b>Show</b> (the status of the upload, as illustrated below).</p> <ul style="list-style-type: none"> <li><b>Completed</b> – Finished processing</li> <li><b>Failed</b> – Completed, but with failed records</li> <li><b>Pending</b> – Uploaded, but not processed</li> </ul> 																						
Search Result	<p>Search results based on selected search parameters. Each row contains file information as described in the table below.</p> <table border="1"> <thead> <tr> <th>Column</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>File Name</td> <td>Name of the file as per naming convention</td> </tr> <tr> <td>File Type</td> <td>Type of file uploaded</td> </tr> <tr> <td>Upload Date</td> <td>Date when the file is uploaded</td> </tr> <tr> <td>Total Records</td> <td>Indicates the number of records in an uploaded file</td> </tr> <tr> <td>Rejected Records</td> <td>Indicates the number of rejected records. Rejected records cannot be fixed in the tool.</td> </tr> <tr> <td>Failed Records</td> <td>Indicates the number of failed records in the uploaded file. Failed Records can be fixed in the tool.</td> </tr> <tr> <td>Fix</td> <td>Icon to open the Failed records screen</td> </tr> <tr> <td>Fixed</td> <td>Indicates the number of records fixed within the file</td> </tr> <tr> <td>Cleared</td> <td>Indicates the number of records cleared within the file</td> </tr> <tr> <td>Download</td> <td>Icon to download the complete file.</td> </tr> </tbody> </table>	Column	Description	File Name	Name of the file as per naming convention	File Type	Type of file uploaded	Upload Date	Date when the file is uploaded	Total Records	Indicates the number of records in an uploaded file	Rejected Records	Indicates the number of rejected records. Rejected records cannot be fixed in the tool.	Failed Records	Indicates the number of failed records in the uploaded file. Failed Records can be fixed in the tool.	Fix	Icon to open the Failed records screen	Fixed	Indicates the number of records fixed within the file	Cleared	Indicates the number of records cleared within the file	Download	Icon to download the complete file.
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## Fixing Failed Records in an Uploaded File

Follow the steps outlined below when correcting failed records in an uploaded file.

Step	Action
1	<p>Select a file with failed records from the <i>Search</i> results (indicated by a wrench icon under the <b>Fix</b> column). Click the wrench icon (  ).</p> 

Step	Action
2	<p>On top of the Fix screen, the file is summarized with the specific failed records listed underneath. Each row contains the <b>Agency ID</b>, <b>Caregiver Code</b>, <b>Schedule ID</b>, <b>Reason for Failure</b> as well as action items (icons) to facilitate further action to include: <b>Help</b>, <b>Edit</b>, and <b>Clear</b>.</p> <p>For this example, click the pencil icon (  ) under the <b>Edit</b> column to correct the first record.</p> 
3	<p>The fields for that record populate right underneath the row. Use the bottom scroll function to navigate the entire row to locate the field to fix. Once corrected, click the <b>Save Changes</b> button above the row.</p>  <p><b>Note:</b> After updating, the fixed record is reprocessed overnight. Correcting a record does not necessarily mean that the record is fixed. If the record fails again, it comes back as a new failed record.</p>
4	<p>If there is an error with the correction, the system alerts of an error to a specific field.</p> <p>Click <b>Close</b> to close the window.</p>  <p>Click on the <b>Help</b> icon (  ) to access guiding documentation to aid in fixing the record.</p> <p>Repeat <b>Step 3</b>.</p> 
5	<p>Once the first record is edited, the summary section indicates that there is <b>1 Fixed</b> record and that <b>2 Failed</b> records remain.</p> 

Step	Action
6	<p>Proceed to fix another record. Click on the pencil icon on another record and correct. Click the <b>Save Changes</b> button.</p> 
7	<p>The system alerts of a successful edit. Click <b>Close</b> to continue.</p> 
8	<p>The summary section indicates that there are <b>2</b> Fixed records and that <b>1</b> Failed record remains.</p> <p>This next example demonstrates the <b>Clear</b> function. The <b>Clear</b> function is typically used when a user does not want a record to be reprocessed. The goal of the EDI Tool is to either fix or clear all failed records.</p> <p>To Clear, click on the Clear icon (🗑️) on the remaining record.</p> 
9	<p>The system prompts for a clear record confirmation. Click <b>Yes</b> to clear.</p> <p>Once cleared, the system indicates that the record has been successfully cleared. Click <b>Close</b>.</p> 

Step	Action
10	<p>To revert back on a cleared record, click on the revert button to re-open the record.</p>

### Clear and Unclear All Buttons

The **Clear All** button clears all the rows in the results and is only visible when uncleared records exist. The **Un-Clear All** button unclears all the rows in the results and is only visible when cleared records exist.

### Download Function

There are two different types of downloads within the EDI Tool, as follows:

To download the **complete file**, click on the download icon from the Search results in the main screen (as illustrated below). Follow the system prompts to save to the workstation.

Download Complete File (All Records)

To download only the **Failed records**, click the download icon from the summary section from the **Fix** screen (as illustrated below). Follow the system prompts to save to the workstation.

Download Failed Records

### *Downloading CSV Files*

Files are downloaded in CSV format. 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.