

# **EDI Tool Job Aid**

DISCLAIMER

This functionality is enabled by HHAX System Administration. Please contact the <u>HHAX</u> <u>Support Team</u> 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*.

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).

eXchange	Home Member Caregiver Visit	Action Billing Report	Admin		Notification	EDI Tool	We	lcome - Life	<u>Su</u> esaver (Life
Upload File		Search Upload							Limited 1
Select File: Select File: Note:Files mu	File Type: EDI Import V Upload ust be 1000 KB in size or smaller.		Date To: 05/16/2019	File Type:	Ý	Show:	Search	Reset	
Search Resu	lts (17)								Page 1 of
File name	F	le Туре	Upload Date	Total Record	Rejected Record	s Failed Records	Fix Fixed	l Cleared	Download
EDI_6548475	487_20180201023002_SelfService.CSV	EDI Import	_						
-		EDI Import	05-16-2019	0	0	0		-	Ŧ
	487_20180201023002_SelfService.CSV	EDI Import	05-16-2019	0	0	0 3	• • • 1	-	¥ *
EDI_65484754					-			-	
EDI_65484754	487_20180201023002_SelfService.CSV	EDI Import	05-16-2019	4	0	3			Ŧ
EDI_65484754 EDI_65484754 EDI_65484754	487_20180201023002_SelfService.CSV 487_20180201023002_SelfService.CSV	EDI Import EDI Import	05-16-2019	4	0	3 0		-	* *

**EDI Tool Main Screen** 



Section		Description
Upload File	Used to upload/im naming conventior	port a file into HHAX. Refer to the <u>EDI Import Guide</u> for a standards.
Search Upload	<ul> <li>Show (the status o</li> <li>Completed – F</li> <li>Failed – Compl</li> </ul>	s to locate specific upload(s): <b>To/From Date, File Type</b> , and f the upload, as illustrated below). inished processing eted, but with failed records baded, but not processed
		ed on selected search parameters. Each row contains file cribed in the table below.
	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
Search Result	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.

# Fixing Failed Records in an Uploaded File

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

Step				Action						
		vith failed records fron the wrench icon ( 🖍 )		h results (i	ndicat	ed by a w	rench io	con ui	nder	the <b>F</b>
	U	pload File	Search Upload							
1		Select File: File Type: Select File: EDI Import V Upload Note:Files must be 1000 KB in size or smaller.	Date From:	Date To:	File Type:		how: All 🗸	Search	Reset	
	5	Search Results (17)								Page 1 of 1
	F	ile name	File Type	Upload Date	Total Record	Rejected Records	Failed Records	Fix Fixed	Cleared	Download
	E	EDI_6548475487_20180201023002_SelfService.CSV	EDI Import	05-16-2019	0	0	0			¥
	E	EDI_6548475487_20180201023002_SelfService.CSV	EDI Import	05-16-2019	4	0	3	<b>≠</b> 1	-	¥
	E	EDI_6548475487_20180201023002_SelfService.CSV	EDI Import	05-16-2019	0	0	0			¥



Step	Action
	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> .
	For this example, click the pencil icon ( $^{\prime\prime}$ ) under the Edit column to correct the first record.
2	C Back       File name     File Type     Upload Date     Total Record     Failed Records     Rejected Records     Fixed     Cleared     Download       CDL_6540475497_20181126023000.csv     EDI Import     05-16-2019     4     3     0     1     0
	Caregiver Code:       Reason:         All       ✓       All       ✓       Search       Clear All         Agency ID       Cargiver Code       Schedule ID       Reason Fer Failure       Help       Edit       Clear         1       6564875487       1065       OB45683       Patient not found in 194AcXchange.       ✓       ●
	2         6554875487.         1065         GB45681         Procedure Code not found in HMAcXchange.         0         UT         0           3         6568475487.         1065         cB45683         Patient not found in HMAcXchange.         0         ✓         0
	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 <i>Save Changes</i> button above the row.
	Agency ID         Carginer Code         Schedule ID         Reason For Failure         Help         Edit         Clear           1         45564375437         1055         ChitSco5         Palent not Faund in HMA/Xchange         0         0          0         0         0         0         0         0
3	Make the necessary changes to the record bolow and then click the Save Changes butten. To edd, double-click on the cell you'd like to moder. Save Changes Save Save Changes Save Changes Save Save Changes Save Changes Save Changes Save Changes Save Changes Save Save Save Changes Save Changes Save Changes Save Save Save Save Save Save Save Save
	2         reservent         1045         Cautes         Procedure Cade not found in HMeXbanos.
	2         6548475487         1065         CB45661         Procedure Code rist found in HHAeXcharige.         0         /         0           3         6548475487         1065         CB45683         Patient well frund in HHAeXcharige.         0         /         0
	<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.
	If there is an error with the correction, the system alerts of an error to a specific field.
	Click <i>Close</i> to close the window.
4	Click on the Help icon ( <sup>①</sup> ) to access guiding documentation to aid in fixing the record.
	Repeat Step 3.
	Once the first record is edited, the summary section indicates that there is <b>1</b> Fixed record and that <b>2</b> Failed records remain.
5	KBack     File Type     Upload Date     Total Record     Failed Records     Fixed     Cleared     Download       EDI. 6548475487_20181126023000.csv     EDI Import     01-25-2019     6     2     Image: Cleared Cl
	Agency ID Cargiver Code Schedule ID Reason For Failure Help Edit Clear
	1     6546475487     1065     CB45681     Procedure Code not found in HHAeXchange.     0     ✓     0       2     6546475487.     1065     GB45683     Patient not found in HHAeXchange.     0     ✓     0



Step	Action
	Proceed to fix another record. Click on the pencil icon on another record and correct. Click the
	Save Changes button.
	Clask           File name         File Type         Uplead Date         Total Record         Failed Records         Fix         Fixed         Cleared         Download
6	EDI (654475487,20191125023000.csv EDI Import: 01-25-2019 5 2 4 1 0 🛓
Ū	Agency ID         Carginer Code         3 diseadule ID         Reason For Pallione         Help         Edit         Clean           1         #S548375487         1055         cB45861         Procedure Code not Found in InstAct/change.         Image: Code not Found in InstA
	2 8568475687 1055 6943583 Patient not found in HMultichange. • 🖌 •
	AgencyTaxID         PayerID         Medical@Number         CaregiverFirstName         CaregiverLastName         CaregiverDateoffirith         ScheduleID         Procedured           65584754         13437         XX1234555         1065         GD45603         HHA Hour
	verCode CaregiverFirstName CaregiverLastName CaregiverGender (
	The system alerts of a successful edit.
7	Click <i>Close</i> to continue.
	Close
	The summary section indicates that there are <b>2</b> Fixed records and that <b>1</b> Failed record remains.
	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.
8	To Clear, click on the Clear icon ( 🗢 ) on the remaining record.
	< Dack
	File name         File Type         Upload Date         Total Record         File         Fixed         Cleared         Download           EDI [6549475487_20181126023000.csv         EDI Import         01:25:2019         6         1         🖍         2         0 <table-cell-columns></table-cell-columns>
	Agency ID Cargiver Code Schedule ID Reason Fer Failure Help Edit Clear
	1 6548475487. 1065 GB45681 Procedure Code not found in HHAeXchange. • /
	The system prompts for a clear record confirmation.
	Aule 3D Research For Parliere
	Click <b>Yes</b> to clear.
	Are you sure want to clear
	record.
	Cancel Yes
9	Once cleared, the system indicates that the record has
	been successfully cleared.
	Click <i>Close</i> .
	Record has been cleared
	successfully.
	Close

			Acti	on					
To revert back on a	a cleared reco	ord, click	on the rev	ert butto	on to re-ope	en the	e recor	d.	
< Back						_			
File name	File Type		Upload Date	Total Record	Failed Records	Fix	Fixed	Cleared	Download
EDI_6548475487_20181126023000.csv	EDI Import		01-25-2019	6	0	۶	2	1	±
Agency ID	Cargiver Code	Schedule ID	Reason For Failure					Help Edit	Clear
	1005	GB45681	Procedure Code not f	ound in HHAeXchance.				• /	5
	< Back File name EDI_6549475487_20181126023000.csv Agency 1D	< Back File name File Type EDI_6548475487_20181126023000.csv EDI Import	Back  File name File Type EDI _6548475487_20181126023000.csv EDI Import  Agency ID Cargiver Code Schedule 3D	To revert back on a cleared record, click on the rev C Back File name File Type Uplead Date EDI6546475487.20181126023000.csv EDI Import 01-25-2019 Agency ID Cargiver Code Schedule ID Reason For Failure	K Back         File Type         Uplead Date         Total Record           File name         File Type         Uplead Date         Total Record           EDI	To revert back on a cleared record, click on the revert button to re-oper         Clack         File name       File Type       Upleed Date       Total Record       Failed Records         EDI_0546475487_20181126023000.csv       EDI Import       01-25-2019       6       0         Agency ID       Cargiver Code       Schedule 3D       Reason For Failure	To revert back on a cleared record, click on the revert button to re-open the         Click on the revert button to re-open the         Click       Total Record       Failed Records       Fix         File name       File Type       Uplead Date       Total Record       Failed Records       Fix         CDI_0548475487_20181126023000.csv       EDI Import       01-25-2019       6       0       #         Agency 1D       Cargiver Code       Schedule 2D       Reason For Failure       Encoder Code of Mark Integers       Encoder Code of Mark Integers	To revert back on a cleared record, click on the revert button to re-open the record         Click on the revert button to re-open the record         Click       File name       File Type       Upleed Date       Total Record       Failed Records       Fix       Fiked         CDI_0546475487_20181126023000.csv       EDI Import       01-25-2019       6       0       #       2         Agency ID       Cargiver Code       Schedule 3D       Reason For Failure	To revert back on a cleared record, click on the revert button to re-open the record.         Cleared         File Type       Uplead Date       Total Record       Filed Records       Fix       Fixed       Cleared         LOIL 6548475497, 20181126023000.csv       EDI Import       0 2       1         Agency ID       Cargiver Code       Schedule 1D       Reason For Failure       Help       Edit         Decedure 2 Mide Schedule 1D       Reason For Failure       Help       Edit

#### 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.

Caregi All	ver Code:	Reason:		• Search			Un-	Clear All	Clear All
	Agency Tax ID	Medicaid Number	Caregiver Code	Schedule ID		Reason For Failure	Help	Edit	Clear
1	982346786	AX123454A4	1065	491BBAK111678	Patient not found in HHAeXchange.		0	1	•
2	982346786	AX123454A	1065	74EEAK411681	Patient not found in HHAeXchange.		0	2	৩
3	982346786	AX1234555	1065	996GGAK611683	Patient not found in HHAeXchange.		0	2	ా

## **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.

Upload File	Search Upload				
Select File:         File Type:           Select File:         All         # Uplow           Note: Files must be 1000 KB in size or smaller.         # Uplow	ad Date From: Date To: MM/DD/YYYY 🗃 MM/DD/YYYY	File Type:	Show: ¢ All	\$ Search Reset	
Search Results(698)				Page	Lof 35   <u>Next</u> Last
File name	File Type	Upioad Date Total Record	Failed Records	Fix Fixed Cleared	Download
EDI_6548475487_20181126023000.csv	EDI Import	01-25-2019 6	2	£ 1 .	*

**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.

ile nan	e	File Ty	pe	Upload Date	Total Record	Failed Records	Fix	Fixed	Clea	red	Download
0I_654	8475487_20181126023000.csv	EDI Im	port	01-25-2019	6	2	۶	1	(	)	£
	Agency ID	Cargiver Code	Schedule ID	Reason For Failu	•				Help	Edit	Clear
1	Agency ID 6548475487	Cargiver Code	Schedule ID GB45681		e : found in HHAeXchange.				Help 0	Edit	Clear

#### **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.