



HHAeXchange Lunch-and-Learn Webinar: EDI Tool *How to Navigate the EDI Tool in the HHAeXchange Portal*

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Agenda

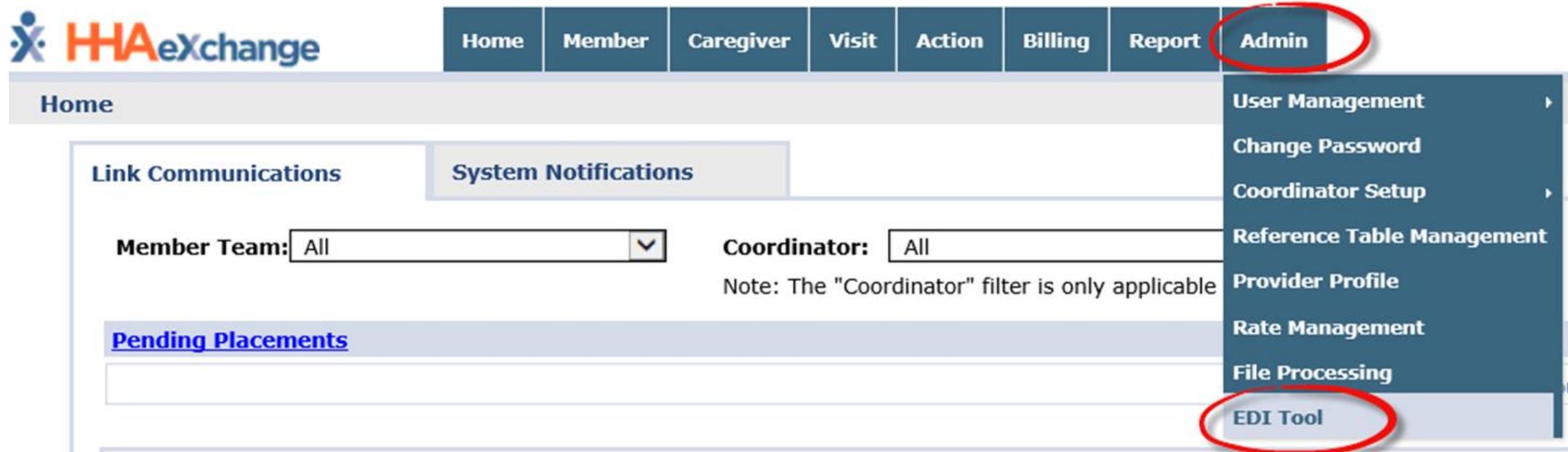
- What is the EDI Tool?
- How to access the EDI Tool
- EDI Tool Descriptions
- Steps to upload EDI import file
- Steps to resolve failed records
- Steps to clear import failures
- How to access the Job Aid
- Download Function
- Key things to remember

What is the EDI Tool?

- Allows users to transmit data directly into the HHAeXchange (HHAX) portal without the need for an FTP client application
- Can be used to:
 - Upload import files directly into HHAX portal
 - Resolve import failures directly within the HHAX portal
 - Clear import failures directly in the HHAX portal

How to access the EDI Tool

Admin > EDI Tool



The screenshot shows the HHAexchange web application interface. At the top left is the HHAexchange logo. A horizontal navigation bar contains the following menu items: Home, Member, Caregiver, Visit, Action, Billing, Report, and Admin. The 'Admin' item is circled in red. A dropdown menu is open from the 'Admin' item, listing the following options: User Management, Change Password, Coordinator Setup, Reference Table Management, Provider Profile, Rate Management, File Processing, and EDI Tool. The 'EDI Tool' option at the bottom of the dropdown is also circled in red. Below the navigation bar, the main content area shows a 'Home' header, followed by tabs for 'Link Communications' and 'System Notifications'. There are two dropdown menus: 'Member Team:' with 'All' selected and 'Coordinator:' with 'All' selected. A note below these says 'Note: The "Coordinator" filter is only applicable'. Below the note is a link for 'Pending Placements'.

**The EDI Tool is permissions based. If you do not see the EDI Tool option, please reach out to edisupport@hhaexchange.com so we can enable the feature for your agency.

EDI Tool Sections & Descriptions

- Upload File

Upload File

Select File: File Type:

Note:Files must be 1000 KB in size or smaller.

Search Upload

Date From: Date To: File Type: Show:

Search Results (8) Page 1 of 1

File name	File Type	Upload Date	Total Record	Rejected Records	Failed Records	Fix	Fixed	Cleared	Download
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- Search Upload
 - Completed
 - Failed
 - Pending
 - Processing

Steps to upload EDI import file

Select a file to upload. Files process within 30 minutes to an hour.

The screenshot shows the 'Upload File' and 'Search Upload' sections of a web interface. The 'Upload File' section has a 'Select File:' button (marked with a red '1') and a 'File Type:' dropdown menu (marked with a red '2'). The 'Search Upload' section includes 'Date From:', 'Date To:', 'File Type:', and 'Show:' dropdowns, along with 'Search' and 'Reset' buttons. A note below the upload section states: 'Note: Files must be 1000 KB in size or smaller.'

Overlaid on this is a Windows File Explorer window titled 'Choose File to Upload'. The address bar shows 'This PC > Documents > EDI Files'. The file list contains one file: 'EDI_999999999_20190630142214', which is a Microsoft Excel file (2 KB) modified on 7/12/2019 at 8:37 AM. The file name is entered in the 'File name' field at the bottom, and the file type is set to 'All Files (*.*)'. The 'Open' button is highlighted.

In the background, a table is partially visible with columns for 'Fix', 'Fixed', 'Cleared', and 'Download'. The table has multiple rows, with the first row showing '0' in the 'Fix' column and a download icon in the 'Download' column. The page number 'Page 1 of 2' and navigation links 'Next' and 'Last' are also visible.

***This step does not apply if your EVV vendor submits import files on behalf of your agency.*

Steps to resolve failed records

Select a file with failed records by clicking the wrench icon.

Upload File
Select File: File Type:
Note: Files must be 1000 KB in size or smaller.

Search Upload
Date From: Date To: File Type: Show:

Search Results (0)									
File name	File Type	Upload Date	Total Record	Rejected Records	Failed Records	Fix	Fixed	Cleared	Download
EDI_6548475487_20190531001601_DuplicateSSN - Copy - Copy...	EDI Import	07-22-2019	12	12	0	-	-	-	
EDI_6548475487_20190531001601_DuplicateSSN - Copy - Copy....	EDI Import	07-22-2019	18	7	2		-	-	
EDI_6548475487_20190531001601_DuplicateSSN.CSV	EDI Import	07-22-2019	15	10	5		-	-	
EDI_6548475487_20190531001601_Delta16Delta - Copy.CSV	EDI Import	07-19-2019	300	193	104		-	-	

Steps to resolve failed records (Cont'd.)

Select the pencil icon to edit the record, double-click on the cell to edit and modify, then save changes.

Agency Tax ID	Medicaid Number	Caregiver Code	Schedule ID	Reason For Failure	Help	Edit	Clear				
1	6548475487	MR14784X	5699877	15987447	Duplicate SSN found in HHAExchange.						
Make the necessary changes to the record below and then click the Save Changes button. To edit, double-click on the cell you'd like to modify.						<input type="button" value="Save Changes"/>	<input type="button" value="Cancel"/>				
Agency Tax ID	Payer ID	Medicaid Number	Caregiver Code	Caregiver First Name	Caregiver Last Name	Caregiver Gender	Caregiver Date of Birth	Caregiver SSN	Schedule ID	Procedure Code	Schedule ID
65484	17044	MR14784X	5699877	Delta	Test	M	1985-05-20	564-58-871	15987447	Rate0	20
2	6548475487	MR14784X	569984	15987449	Schedule ID not found in HHAExchange.						

***Corrected records will reprocess in the nightly cycle. Changes will not be reflected in the portal until the next morning.*

Steps to clear import failures

The Clear function enables you to remove a record from reprocessing if a record was uploaded in error.

The screenshot displays the HHAexchange web interface. At the top, there is a navigation menu with links: Home, Recipient, Caregiver, Visit, Action, Billing, Report, and Admin. A notification bell icon shows 23 notifications. The user is logged in as 'LifeSaver (LifeSaver Home Care Inc)' with a 'Support Center | Logout' link. The main content area shows a table of import records. The first row is highlighted, showing a file named 'EDI_6548475487_20190531001601_Delta11.CSV' with 4 total records, 3 failed, and 1 rejected. Below the table, there are search filters for Medicaid Number, Caregiver Code, and Reason, along with a 'Search' button and a 'Clear All' button. A modal dialog box is open in the foreground, asking 'Are you sure want to clear record?' with 'Cancel' and 'Yes' buttons. The 'Yes' button is circled in red. In the background table, the 'Clear' button for the first record is also circled in red.

File name	File Type	Upload Date	Total Record	Failed Records	Rejected Records	Fixed	Cleared	Download
EDI_6548475487_20190531001601_Delta11.CSV	EDI Import	06-26-2019	4	3	1	0	0	

Agency Tax ID	Medicaid Number	Caregiver Code	Schedule ID	Reason For Failure	Help	Edit	Clear
1	6548475487	MR14784X		g shifts are not allowed.			
2	6548475487	MR14784X		g shifts are not allowed.			
3	6548475487	MR14784X		g shifts are not allowed.			

Steps to clear import failures (Cont'd.)

Records can be cleared individually, or you can clear all records simultaneously.

- If any records were cleared in error, click on the revert button to re-open the record.

The screenshot displays a web application interface for managing import records. At the top, a table lists the imported file: EDI_6548475487_20190531001601_Delta11.CSV, which is an EDI Import file uploaded on 06-26-2019. It contains 4 total records, with 3 failed, 1 rejected, 0 fixed, and 0 cleared. Below this, there are search filters for Medicaid Number, Caregiver Code, and Reason, all currently set to 'All'. A 'Search' button and a 'Clear All' button (highlighted with a red box) are visible. The main table shows three records, each with an Agency Tax ID of 6548475487 and a Medicaid Number of MR14784X. The Reason For Failure for all records is 'g shifts are not allowed.'. Each record has 'Help', 'Edit', and 'Clear' buttons. A confirmation dialog box is overlaid on the table, asking 'Are you sure want to clear all records?'. The dialog has 'Cancel' and 'Yes' buttons, with the 'Yes' button circled in red.

File name	File Type	Upload Date	Total Record	Failed Records	Rejected Records	Fixed	Cleared	Download
EDI_6548475487_20190531001601_Delta11.CSV	EDI Import	06-26-2019	4	3	1	0	0	

Medicaid Number: All | Caregiver Code: All | Reason: All | Search | Clear All

Agency Tax ID	Medicaid Number	Caregiver Code	Schedule ID	Reason For Failure	Help	Edit	Clear
1	6548475487	MR14784X		g shifts are not allowed.			
2	6548475487	MR14784X		g shifts are not allowed.			
3	6548475487	MR14784X		g shifts are not allowed.			

Are you sure want to clear all records?

Cancel Yes

How to access the Job Aid

If you need assistance with a failure, click the help icon. The Job Aid will open in a new window.

The screenshot shows a web interface for managing EDI records. At the top, there is a table with columns: File name, File Type, Upload Date, Total Record, Failed Records, Rejected Records, Fixed, Cleared, and Download. Below this is a search filter section with dropdown menus for Medicaid Number, Caregiver Code, and Reason, along with Search and Clear All buttons. At the bottom, a table lists failed records with columns: Agency Tax ID, Medicaid Number, Caregiver Code, Schedule ID, Reason For Failure, Help, Edit, and Clear. A red circle highlights the 'Help' icon in the first row of this table.

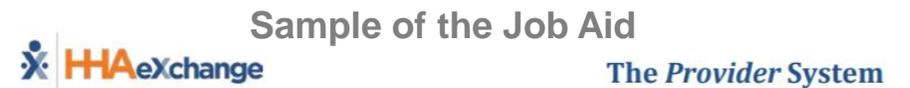
File name	File Type	Upload Date	Total Record	Failed Records	Rejected Records	Fixed	Cleared	Download
EDI_6548475487_20190531001601_Delta10.CSV	EDI Import	06-26-2019	5	1	3	0	0	

Medicaid Number: All Caregiver Code: All Reason: All Search Clear All

Agency Tax ID	Medicaid Number	Caregiver Code	Schedule ID	Reason For Failure	Help	Edit	Clear
1	6548475487	MR14784X	5556662102	Overlapping shifts are not allowed.			

The Job Aid contains a list of the most common failures and the action required to correct the record directly from the tool.

Correcting Failed Records in the EDI Tool Job Aid



Correcting Failed Records in the EDI Tool Job Aid

The table below contains the course of action to take when correcting EDI Rejections via the EDI Tool in the HHAExchange (HHAX) system. **Note:** Exceptions will clear (next day) after nightly reprocessing is completed.

Notes: Please contact EDIsupport@hhaexchange.com for general questions regarding the EDI process and procedures.

Rejection Reason	Action to Take
Billing Service Code is required	Include Service Code and save changes.



Download Function

To download the full file in CSV, click the download icon from the search results.

- To preserve the file format, open the file with a tabbed text editor such as Notepad++.

Upload File

Select File: **File Type:**

Note: Files must be 1000 KB in size or smaller.

Search Upload

Date From: **Date To:** **File Type:** **Show:**

Search Results (1) Page 1 of 1

File name	File Type	Upload Date	Total Record	Rejected Records	Failed Records	Fix	Fixed	Cleared	Download
EDI_6548475487_20190630142214_SelfService_20190712083833.CSV	EDI Import	07-12-2019	4	0	1	🔧	3	-	

Download Function (Cont'd.)

To download the CSV file that only contains the import failures, select the fix icon and then select the download icon.

- To preserve the file format, open the file with a tabbed text editor such as Notepad++. You can fix all failed records in bulk in the editor and re-upload the file for processing.

File name	File Type	Upload Date	Total Record	Failed Records	Rejected Records	Fixed	Cleared	Download
EDI_6548475487_20190630142214_SelfService_20190712...	EDI Import	07-12-2019	4	1	0	3	0	

Medicaid Number: Caregiver Code: Reason:

Agency Tax ID	Medicaid Number	Caregiver Code	Schedule ID	Reason For Failure	Help	Edit	Clear	
1	6548475487	01528133	4	4490-1	Patient not found in HHAeXchange.			

Key things to remember

- *The upload function should not be used if your EVV vendor submits import files on behalf of your agency.*
- *You can continue to use your agency's FTP to upload files or you can choose to upload files via the EDI Tool.*
- *The Search Upload date auto defaults to the last 7 days in the tool.*
- *Corrected records will reprocess in the nightly cycle. Changes will not be reflected in the portal until the next morning.*
- *Files are downloaded in CSV format. To preserve the file format, select Open With and select a tabbed text editor (such as Notepad++).*
- *For additional assistance, please email edisupport@hhaexchange.com*