



Caregiver Bulk Import Process Guide

April 2021

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Document Revision History

Date	Description of Revision
12/10/2018	Initial version of the document
04/01/2021	Update to User Field 1 : Office ID (Required when assigning Caregiver to a specified Office)

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Introduction

Although Caregivers can be added individually in HHAExchange (HHAX) via the **Caregiver > New Caregiver** functionality, Providers may need to load multiple Caregiver profiles and updates at once. The **Caregiver Bulk Import** process enables Providers to import basic information to create new Caregivers in the HHAExchange portal. This guide provides instructions on how to create the Caregiver file to import into HHAX using the **Caregiver Import Template**.

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

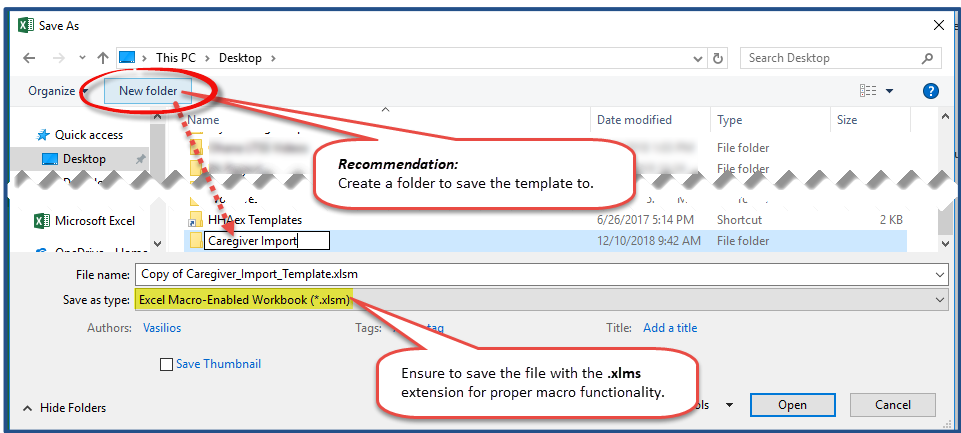
Caregiver Import Template

The **Caregiver Import Template** is a Microsoft Excel file designed to facilitate the import process for Agencies who need to load numerous Caregiver profiles (bulk) at once. Excel macros are incorporated to ensure that cell properties are locked in place and formatted in accordance to the information required for Caregivers in the HHAX system.

A validation mechanism has been built into the spreadsheet to assist users in identifying existing errors (indicated as red-blocked cells). The **Validate** button initially identifies the errors. As errors are corrected, continue to click this button to check for additional data and formatting errors. Once errors have been addressed, the file is saved in .csv format and ready to send to HHAX for importing on the Agency’s behalf.

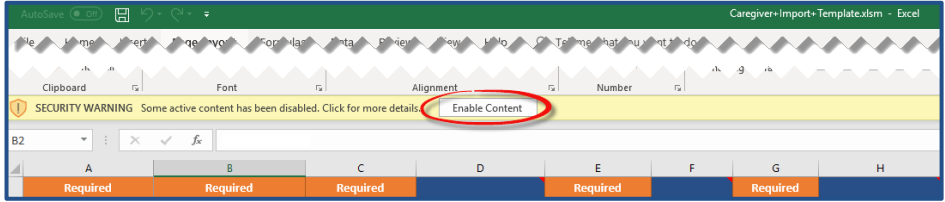
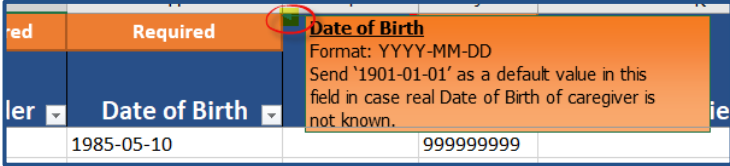
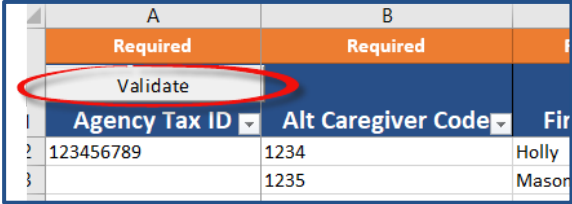
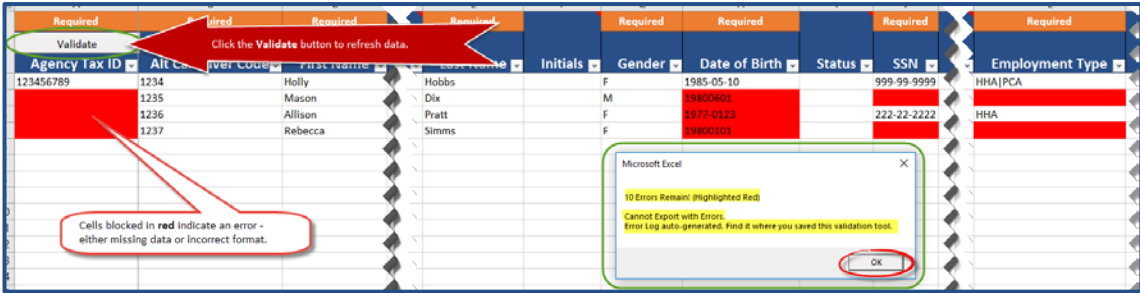
IMPORTANT: Users MUST follow each step outlined below for a successful outcome.

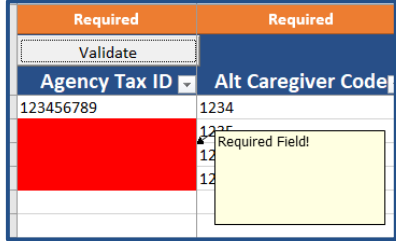
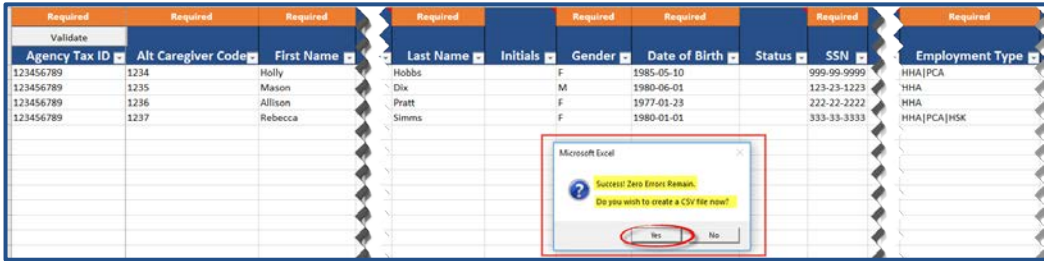
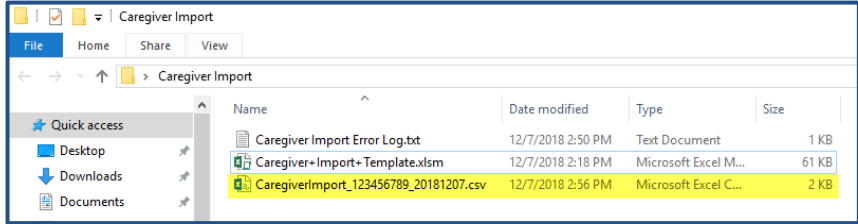
Saving the Template

Step	Action
1	Click Caregiver Import Template to access the file. Click OK to the network security alerts to allow the built-in macros (if/as needed).
2	<p>The file opens as a <u>Read-Only</u>. Save the template to your local workstation. It is recommended to create a folder to save the template. Ensure the file is saved with an .xlsm extension for proper macro functionality.</p>  <p style="text-align: center;">Saving Template File to Workstation</p>
3	The file remains open upon saving. Close/Exit out of the file . Continue to the next phase below.

Preparing the File

Complete the following steps to create and submit the Caregiver Import file.

Step	Action
1	<p>Locate the saved template and open. Click the Enable Content button.</p> 
2	<p>Enter data. Required fields are denoted in the column header with orange "Required" labels. Hover over the header columns to view field descriptions and requirements. Refer to the Caregiver Import specifications table for further description and formatting details (if/as needed).</p>  <p style="text-align: center;">Field Descriptions</p>
3	<p>Once complete, click the Validate button (top of the left-most column; above Agency Tax ID).</p>  <p style="text-align: center;">Validate & Export Button</p>
4	<p>If errors are detected, the user is alerted with an error message indicating the number of errors found. Click OK and correct errors (indicated by red cell blocks).</p> <p>Note: An Error Log file is auto-generated and stored in the folder where the Caregiver Import Template is saved. This log displays a list of the outstanding errors after clicking Validate.</p>  <p style="text-align: center;">Error Alert</p>

Step	Action
	<p>Hovering over the red highlight generates a note indicating the possible error (such as <i>Required Field</i>).</p>  <p style="text-align: center;">Required Field Note</p>
5	<p>Click the Validate button to continue to check the data after making edits to correct those cells appearing in red. The tool continues to alert and mark file with errors until the file is ready. Repeat steps 3-4 until all errors are corrected.</p>
6	<p>Once all records are corrected and validated, a success alert indicates that the file is ready. Click Yes to create a .csv file.</p>  <p style="text-align: center;">Success Alert</p> <p>The file is auto-generated and saved in the folder holding the template. The file is saved with a standard naming convention (CaregiverImport_AgencyTaxID_YYYYMMDD.csv) with a .csv extension, where the name is created as follows:</p> <ul style="list-style-type: none"> • AgencyTaxID refers to the Agency's Tax ID (based on the information in the first column) • YYYYMMDD is the current date.
7	<p>Close/Exit out of the file.</p>
8	<p>Locate the saved file on your workstation.</p>  <p style="text-align: center;">Auto-generated/Saved File</p>
9	<p>Email the file to EDIsupport@hhaexchange.com. Upon receipt of the file, the EDI Team imports the file on behalf of the Agency.</p>

File Processing

Please allow 3 days for processing. The Electronic Data Interchange (EDI) Team will contact the user who submitted the file via email with a status. Further instructions are provided by the EDI team member (if/as needed).

Caregiver Import

Create the Caregiver Import file based on the following format.

Caregiver Import					
Field	Description	Data Type	Required	Max Length	Cell
Agency Tax ID	Tax ID of the Agency	Number	Required	10	A
Caregiver Code	Unique ID of the Caregiver in Agency's Management System. This value goes into the Alt Caregiver Code field within HHAExchange.	Text	Required	20	B
First Name	Caregiver's First Name	Text	Required	50	C
Middle Name	Caregiver's Middle Name	Text	Optional	50	D
Last Name	Caregiver's Last Name	Text	Required	50	E
Initials	Caregiver's Initials	Text	Optional	2	F
Gender	Possible Values: M (Male) or F (Female)	Text	Required	1	G
Date of Birth	Format: YYYY-MM-DD. Send '1901-01-01' as a default value in this field in case real Date of Birth of caregiver is not known.	Date	Required	10	H
Status	Possible Value: Active or Inactive <ul style="list-style-type: none"> If this value is not provided, Caregivers are created with 'Active' status. 	Text	Optional	20	I
SSN	Social Security Number Format: XXX-XX-XXXX. Send '999-99-9999' as a default value in this field in case real SSN of caregiver is not known.	Text	Required	11	J
Primary Patient Team	"Default" if this information is not available in the Agency's Management System.	Text	Optional	100	K
Employment Type	Pipe () separated list of the applicable Disciplines. Refer to the Employment Type Tables section for a list of Disciplines and instructions.	Text	Required	100	L
Street 1	Address 1	Text	Optional	50	M
Street 2	Address 2	Text	Optional	50	N
City	City	Text	Optional	50	O
State	State	Text	Optional	2	P
Zip	Format: XXXXX	Number	Optional	5	Q
Home Phone	Format: XXX-XXX-XXXX	Text	Optional	12	R
Phone 2	Format: XXX-XXX-XXXX	Text	Optional	12	S
Phone 3	Format: XXX-XXX-XXXX	Text	Optional	12	T
Emergency 1 Name	Emergency 1 Name	Text	Optional	50	U
Emergency 1 Address	Emergency 1 Address	Text	Optional	50	V
Emergency 1 Relationship	Emergency 1 Relationship	Text	Optional	50	W
Emergency 1 Phone 1	Format: XXX-XXX-XXXX	Text	Optional	12	X
Emergency 1 Phone 2	Format: XXX-XXX-XXXX	Text	Optional	12	Y
Emergency 2 Name	Emergency 2 Name	Text	Optional	50	Z

Caregiver Import						
Field	Description	Data Type	Required	Max Length	Cell	
Emergency 2 Address	Emergency 2 Address	Text	Optional	50	AA	
Emergency 2 Relationship	Emergency 2 Relationship	Text	Optional	50	AB	
Emergency 2 Phone 1	Format: XXX-XXX-XXXX	Text	Optional	12	AC	
Emergency 2 Phone 2	Format: XXX-XXX-XXXX	Text	Optional	12	AD	
User Field 1	<p>Office ID unique office ID in HHAeXchange. Note: The Office ID is located in Office Setup (navigate to <i>Admin > Office Setup > Search Office Results</i>. Click Here to see where to find Office ID.</p> <p>When Required: When assigning Caregivers to a specified office.</p>	Number	Situational	6	AE	
User Field 2		Text	Optional	500	AF	
User Field 3		Text	Optional	500	AG	
User Field 4		Text	Optional	500	AH	
User Field 5		Text	Optional	500	AI	

Employment Type Tables

The following tables provide the codes and descriptions for the **Employment Type** field; **Non-Skilled** and **Skilled**. Note that ONLY the codes in these tables can be used, as follows:

- Enter codes in ALL CAPS
- Multiple codes must be separated by a PIPE DELIMITER (no space between). Example: "HHA|PCA|HSK"
- A Caregiver can only be associated with one category (either **Non-Skilled** or **Skilled**); therefore, if multiple employment types apply, use only the codes from the single applicable table.

Employment Type (Non-Skilled)	
Code	Description
APC	Advanced Personal Care
CBSA	Community Based Support Aide
CNA	Certified Nursing Assistant
CH	Chore
COMP	Companion
ESC	Escort
HCSS	Home and Community Support Services
HHA	Home Health Aide
HMK	Homemaker
HSK	Housekeeper
ILST	Independent Life Skill Training
PA	Personal Assistant
PBIS	Positive Behavioral Intervention and Support
PC	Personal Care
PCA	Personal Care Assistant
RESP	Respite
SDP	Structured Day Program
SHHA	Supportive Home Health Aide
SHC	Supportive Home Care Aide
SPC	Supportive Personal Care
Other (Non-Skilled)	Other (Non-Skilled)

Employment Type (Skilled)	
Code	Description
LPN	Licensed Practical Nurse
MSW	Medical Social Worker
NT	Nutritionist
OT	Occupational Therapist
PT	Physical Therapist
RN	Registered Nurse
RT	Respiratory Therapist
SCI	Service Coordinator Initial
SCM	Service Coordinators Monthly Billing
ST	Speech Therapist
Other (Skilled)	Other (Skilled)