



Homecare EDI Import Interface Guide (v3)

March 2020

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Document Revision History

Date	Description of Revision
01/30/2018	Initial version of the document
02/01/2018	<p>Updates since V1 release:</p> <ul style="list-style-type: none"> Field descriptions have been identified for all Interfaces <p>Caregiver Import Interface</p> <ul style="list-style-type: none"> Default value of Date of Birth is changed to "1901-01-01" <p>Schedules Import Interface</p> <ul style="list-style-type: none"> Patient ID field description, data type, max length has been modified Added a new column for "Payer ID" Caregiver Code field description has been modified <p>Confirmed Visits Import Interface</p> <ul style="list-style-type: none"> Patient ID field description, data type, max length has been modified Added a new column for "Payer ID" Added a new column for "Is Deletion" Caregiver Code field description has been modified <p>Billed Visits Import Interface</p> <ul style="list-style-type: none"> Patient ID field description, data type, max length has been modified Added a new column for "Payer ID" Added a new column for "Invoice Line Item ID" Caregiver Code field description has been modified <p>Visit Edit Reason Codes and Visit Edit Action Taken</p> <ul style="list-style-type: none"> Added "Other" at the end of each table
02/07/2018	<p>Billed Visits Import Interface</p> <ul style="list-style-type: none"> Invoice Number field character maximum changed from 20 to 12
03/20/2018	<ul style="list-style-type: none"> New Additional Visit Info Interface added to import Missed Visit Details, Travel Time Details and Timesheet Details Modified below-listed import interfaces to include new User Fields (1-7). <ul style="list-style-type: none"> Caregiver Import Schedules Import Confirmed Visits Import Billed Visits Import
03/28/2018	<ul style="list-style-type: none"> Correct SFTP introduction Update Outbox description and Interface Summary table
04/12/2018	<ul style="list-style-type: none"> Modified Caregiver Code description in Schedule, Confirmed Visits, Billed Visits Import interfaces Added a new column "POC ID" in Schedule Import interface.
04/27/2018	<ul style="list-style-type: none"> Modified Billed Visits Import to increase length of Invoice Number to 18 chars.
05/02/2018	<ul style="list-style-type: none"> Modified Additional Visits Info Import interface to accept codes for Missed Visit Reason and Missed Visit Action Taken Modified description of Duties field in Confirmed Visits Import and Billed Visits Import interface.
05/09/2018	<ul style="list-style-type: none"> Removed Visit Edit Code tables

Date	Description of Revision
06/26/2018	<ul style="list-style-type: none">• Updates to Additional Visits Info page information
04/12/2019	<ul style="list-style-type: none">• Added: SFTP Retention Policy• Update to Invoice Line Item ID requirements
11/11/2019	<ul style="list-style-type: none">• Update: Confirmed Visit: Notes field, character increase from 500 to 1000• Update: Billed Visit: Notes field, character increase from 500 to 1000
03/20/2020	<ul style="list-style-type: none">• Update Caregiver Gender options• Update: Missed Visit Notes field, character increase from 500 to 1000• Update: Cancel Missed Visit Notes field, character increase from 500 to 1000

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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.

Other relevant documentation regarding the EDI process includes:

- **Homecare EDI Export Interface Guide** – export files specifications, templates and formats

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.

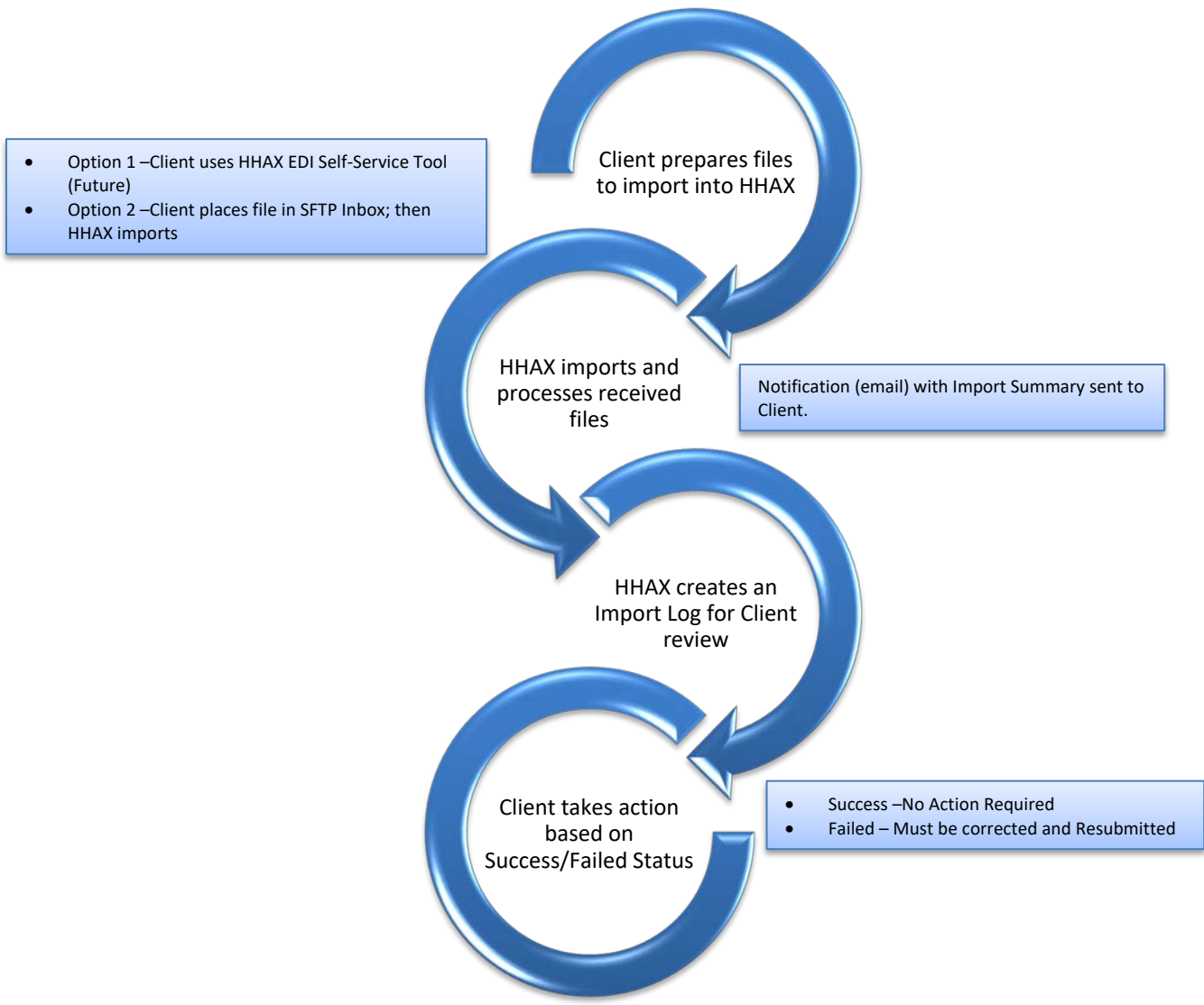
Understanding the EDI Process

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 will have the option of using the EDI Self-Service Tool (in the future) or placing 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.

SFTP Client Configuration Requirements

The following information is needed to connect to the SFTP location.

- HOST/IP/URL: **sftp.hhaexchange.com**
- Username: **Enter the user name received from HHAExchange**
- Password: **Enter the password received from HHAExchange**
- Port: **22**
- Connection: **SSH/SFTP**

SFTP Folder Structure

Folders are used to organize the files exchanged through SFTP as follows:

- **Inbox** – Used to *import* a file into HHAX. Users can place files into the Inbox folder for automated import into the HHAX system.
- **Outbox** –For imports, the **Response File** for each import is placed in the Outbox (after processing) where users can view successful/unsuccessful files.

SFTP Retention Policy

The following guidelines address how long files are retained by HHAX before removal from the HHAX SFTP server.

- Files in Inbox folders are retained until successfully processed and moved to the *Processed* folder.
- All files size **50 MEGABYTES** or larger in the *Processed*, *Saved*, or *Outbox* SFTP folders are retained for **3 days**.
- All other files in the *Processed*, *Saved*, or *Outbox* SFTP folders are retained for **15 days**.

Interface Summary

The following table contains a brief description as well as direction and location of each Import interface.

Integration Guide			
Interface File	Direction	SFTP Folder	Description
Caregiver Demographics	Import	Inbox	Creates/Updates Caregiver information
Schedules	Import	Inbox	Creates/Updates Schedule information
Confirmed Visits	Import	Inbox	Creates schedules or updates schedule/visit information

Integration Guide			
Interface File	Direction	SFTP Folder	Description
Billed Visits	Import	Inbox	Imports visit confirmation and triggers the billing process. All the visits that pass prebilling validations are invoiced.
Additional Visits Info	Import	Inbox	Imports missed visits details, travel time details and timesheet details
Response File	Response	Outbox	Folder to hold Response Files for processed files

File Format

File Format	
File Type	CSV
Text Qualifier	Double Quotes
Headers are included?	Yes

HHAX Homecare Import Interface File Information File Name and Frequency			
Interface	SFTP Location	File Name	Frequency (SFTP Import Only)
Caregiver Demographics	Inbox	Incremental File: LTDIN_AgencyID_CaregiverDemV3_YYYYMMDDHHMMSS.CSV Full File: LTDIN_AgencyID_CaregiverDemV3_YYYYMMDDHHMMSS_Full.CSV	Incremental: Every 30 minutes Full File: Every Weekend
Schedules	Inbox	Incremental File: LTDIN_AgencyID_SchedulesV3_YYYYMMDDHHMMSS.CSV Full File: LTDIN_AgencyID_SchedulesV3_YYYYMMDDHHMMSS_Full.CSV	Incremental: Every 30 minutes Full File: Every Weekend (last 180 days)
Confirmed Visits	Inbox	Incremental File: LTDIN_AgencyID_VisitsV3_YYYYMMDDHHMMSS.CSV Full File: LTDIN_AgencyID_VisitsV3_YYYYMMDDHHMMSS_Full.CSV	Incremental: Every 30 minutes Full File: Every Weekend (last 180 days)
Billed Visits	Inbox	LTDIN_AgencyID_BilledVisitsV3_YYYYMMDDHHMMSS.CSV	As and when the Client desires.
Additional Visits Info	Inbox	Incremental File: LTDIN_AgencyID_AddVisitInfoV3_YYYYMMDDHHMMSS.CSV Full File: LTDIN_AgencyID_AddVisitInfoV3_YYYYMMDDHHMMSS_Full.CSV	Incremental: Every 30 minutes Full File: Every Weekend (last 180 days)

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
Caregiver Import	LTDIN_AgencyID_CaregiverDemV3_YYYYMMDDHHMMSS.CSV
Confirmed Visits Import	LTDIN_AgencyID_VisitsV3_YYYYMMDDHHMMSS.CSV
Schedules Import	LTDIN_AgencyID_SchedulesV3_YYYYMMDDHHMMSS.CSV
Billed Visits Import	LTDIN_AgencyID_BilledVisitsV3_YYYYMMDDHHMMSS.CSV
Additional Visits Info	LTDIN_AgencyID_AddVisitInfoV3_YYYYMMDDHHMMSS.CSV

To elaborate, the following example explains the naming convention:

File Name: **LTDIN_123_CaregiverDemV3_20171013080030.CSV**

LTDIN = Hardcoded

123 = 3-character Agency ID

CaregiverDemV3 = File type identifier (Caregiver Demographics)

20171013 = Date in YYYYMMDD format

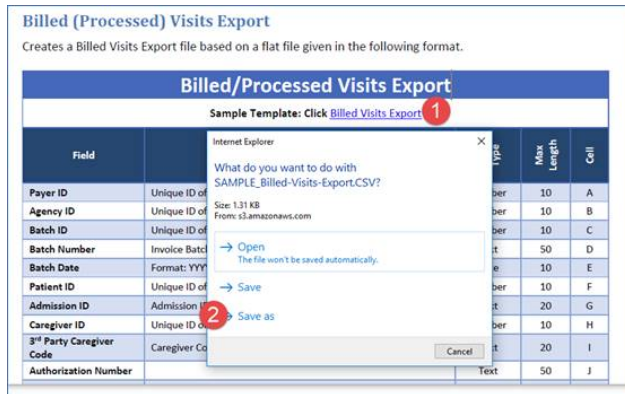
080030 = Time Stamp in HHMMSS format

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 text editor (such as Notepad). This preserves the formats for each field.



Import Interfaces - Required Fields and Formats

As with the Naming Convention, there are required fields per file document which must be in specific format. The following sections cover each File Type and applicable required fields and cell formats. Each section contains the table of Required Fields and (field) Formats.

HHAX Flat File Data Exchange interfaces support the following import operations into HHAX.

- Caregiver Import
- Schedules Import
- Additional Visit Info
- Confirmed Visits Import
- Billed Visits Import

Caregiver Import

Caregiver Import file based on a flat file given in the following format.

Caregiver Import																									
Sample Template: Click Caregiver Import																									
<i>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.</i>																									
Field	Description	Data Type	Required	Max Length	Cell																				
Agency ID	ID of the Agency in HHAExchange.	Number	Y	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	Y	20	B																				
First Name	Caregiver's First Name	Text	Y	50	C																				
Middle Name	Caregiver's Middle Name	Text	N	50	D																				
Last Name	Caregiver's Last Name	Text	Y	50	E																				
Initials	Caregiver's Initials	Text	N	2	F																				
Gender	Possible Values: M (Male), F (Female), or U (Undefined)	Text	Y	1	G																				
Date of Birth	Format: YYYY-MM-DD. If this value is not provided, '1901-01-01' is loaded into this field in Caregiver Profile.	Date	N	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	N	20	I																				
SSN	Social Security Number Format: XXX-XX-XXXX. If this value is not provided, the system generates a fake SSN value.	Text	N	11	J																				
Primary Patient Team	"Default" if this information is not available in the Agency's Management System.	Text	N	100	K																				
Start Date	Reserved for future use. This field is left empty.	Date	N	10	L																				
Rehire	Possible Values: Y (Yes) or N (No). HHAX does not allow two Caregivers with the same SSN. However, if <i>Rehire</i> is set to "Y", then system allows it.	Text	N	1	M																				
Rehire Date	Format: YYYY-MM-DD Required if <i>Rehire</i> is set to "Y"	Date	N	10	N																				
Employment Type	Pipe () separated list of the Disciplines. e.g. "HHA PCA HSK" Disciplines as follows:		Text	Y	100	O																			
	<table border="1"> <thead> <tr> <th>Skilled</th> <th>Unskilled</th> </tr> </thead> <tbody> <tr> <td>• RN</td> <td>• PCA</td> </tr> <tr> <td>• LPN</td> <td>• HHA</td> </tr> <tr> <td>• PT</td> <td>• HMK</td> </tr> <tr> <td>• OT</td> <td>• HSK</td> </tr> <tr> <td>• ST</td> <td>• PA</td> </tr> <tr> <td>• MSW</td> <td>• HCSS</td> </tr> <tr> <td>• NT</td> <td>• CNA</td> </tr> <tr> <td>• RT</td> <td>• APC</td> </tr> <tr> <td>• SCM</td> <td></td> </tr> <tr> <td>• SCI</td> <td></td> </tr> <tr> <td>• Other Skilled</td> <td></td> </tr> </tbody> </table>	Skilled					Unskilled	• RN	• PCA	• LPN	• HHA	• PT	• HMK	• OT	• HSK	• ST	• PA	• MSW	• HCSS	• NT	• CNA	• RT	• APC	• SCM	
Skilled	Unskilled																								
• RN	• PCA																								
• LPN	• HHA																								
• PT	• HMK																								
• OT	• HSK																								
• ST	• PA																								
• MSW	• HCSS																								
• NT	• CNA																								
• RT	• APC																								
• SCM																									
• SCI																									
• Other Skilled																									
Ethnicity	One of the following: <ul style="list-style-type: none"> • Hispanic • American Indian • Asian • African American • Two or More Races • Caribbean Indian • Pacific Islander • Indian 	Text	N	50	P																				

Caregiver Import

Sample Template: Click [Caregiver 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.

Field	Description	Data Type	Required	Max Length	Cell
	<ul style="list-style-type: none"> • Native Hawaiian • Bengali • Caucasian • Unknown 				
Employee Type	Reserved for future use. This field is left empty.	Text	N	1	Q
Registry Number	Employment Registry Number	Text	N	20	R
Registry Date	Date the Caregiver information was entered/checked in the registry. Format: YYYY-MM-DD	Date	N	10	S
Street 1	Address 1	Text	N	50	T
Street 2	Address 2	Text	N	50	U
City	City	Text	N	50	V
State	State	Text	N	2	W
Zip	Format: XXXXX	Number	N	5	X
Home Phone	Format: XXX-XXX-XXXX	Text	N	12	Y
Phone 2	Format: XXX-XXX-XXXX	Text	N	12	Z
Phone 3	Format: XXX-XXX-XXXX	Text	N	12	AA
Emergency 1 Name	Emergency 1 Name	Text	N	50	AB
Emergency 1 Address	Emergency 1 Address	Text	N	50	AC
Emergency 1 Relationship	Emergency 1 Relationship	Text	N	50	AD
Emergency 1 Phone 1	Format: XXX-XXX-XXXX	Text	N	12	AE
Emergency 1 Phone 2	Format: XXX-XXX-XXXX	Text	N	12	AF
Emergency 2 Name	Emergency 2 Name	Text	N	50	AG
Emergency 2 Address	Emergency 2 Address	Text	N	50	AH
Emergency 2 Relationship	Emergency 2 Relationship	Text	N	50	AI
Emergency 2 Phone 1	Format: XXX-XXX-XXXX	Text	N	12	AJ
Emergency 2 Phone 2	Format: XXX-XXX-XXXX	Text	N	12	AK
Language 1	Name of the Language.	Text	N	20	AL
Language 2	Name of the Language.	Text	N	20	AM
Language 3	Name of the Language.	Text	N	20	AN
Language 4	Name of the Language.	Text	N	20	AO
Hire Date	Format: YYYY-MM-DD	Date	N	10	AP
Two References Verified	Possible Values: Y (Yes) or N (No)	Text	N	1	AQ
Application Date	Format: YYYY-MM-DD	Date	N	10	AR
Name of Training School	Caregiver's training school	Text	N	100	AS
Certification Date	Format: YYYY-MM-DD	Date	N	10	AT
Certification Verified	Possible Values: Y (Yes) or N (No)	Text	N	1	AU
Criminal Background Sent Out Date	Format: YYYY-MM-DD	Date	N	10	AV
Criminal Background Status	Possible Values: OK or Pending	Text	N	10	AW

Caregiver Import

Sample Template: Click [Caregiver 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.

Field	Description	Data Type	Required	Max Length	Cell
Criminal Background Returned Date	Format: YYYY-MM-DD	Date	N	10	AX
I-9 Verified	Possible Values: Y (Yes) or N (No)	Text	N	1	AY
I-9 Expire	Possible Values: Y (Yes) or N (No)	Text	N	1	AZ
I-9 Expiration Date	Format: YYYY-MM-DD (only if I-9 expire is set to Yes)	Date	N	10	BA
Competency Initial Evaluation Date	Format: YYYY-MM-DD	Date	N	10	BB
Last Annual Evaluation Date	Format: YYYY-MM-DD	Date	N	10	BC
Annual In-service Requirements met?	Possible Values: Y (Yes) or N (No)	Text	N	1	BD
Pre-employment Physical Date	Format: YYYY-MM-DD	Date	N	10	BE
Annual Health Assessment Date	Format: YYYY-MM-DD	Date	N	10	BF
Rubella	Possible Values: Y (Yes) or N (No)	Text	N	1	BG
Rubeola	Possible Values (Y/N/NA); i.e. (Yes/No/Not Applicable)	Text	N	2	BH
PPD Date	Format: YYYY-MM-DD	Date	N	10	BI
PPD Result	Possible Values: Positive or Negative	Text	N	10	BJ
Chest X-ray Date	Format: YYYY-MM-DD	Date	N	10	BK
Last TB-Screen Date	Format: YYYY-MM-DD	Date	N	10	BL
Flu Vaccination	Possible Values: <ul style="list-style-type: none"> Completed (In-Office) Completed (Elsewhere) Facemask Provided Exempt Declined 	Text	N	50	BM
Flu shot Date	Format: YYYY-MM-DD	Date	N	10	BN
Flu shot Comments	Flu shot Comments	Text	N	500	BO
H1N1 Vaccination or Exempt	Possible Values: Y (Yes) or N (No)	Text	N	1	BP
H1N1 Vaccination Date	Mandatory if "H1N1 Vaccination" is "Y" Format: YYYY-MM-DD	Date	N	10	BQ
Is Deletion	Possible Values: Y (Yes) or N (No)	Text	N	1	BR
Termination Date	Format: YYYY-MM-DD Mandatory if Status is 'Terminated'	Date	N	10	BS
User Field 1		Text	N	500	BT
User Field 2		Text	N	500	BU
User Field 3		Text	N	500	BV
User Field 4		Text	N	500	BW
User Field 5		Text	N	500	BX

Caregiver Import

Sample Template: Click [Caregiver 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.*

Field	Description	Data Type	Required	Max Length	Cell
User Field 6		Text	N	500	BY
User Field 7		Text	N	500	BZ

Schedules Import

Schedules in HHAExchange based on a flat file given in the following format.

Schedules Import					
Sample Template: Click Schedules 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.					
Field	Description	Data Type	Required	Max Length	Cell
Agency ID	ID of the Agency in HHAExchange.	Number	Y	10	A
Patient ID	Member identifier. Possible values <ul style="list-style-type: none"> HHAExchange unique ID MCO Member ID Medicaid Number MR Number The Agency's Management System can decide which value to send in the Schedule file. HHAX needs to know which value the Agency is sending, before activating data exchange interfaces.	Text	Y	50	B
Caregiver Code	Caregiver identifier. Possible Values <ul style="list-style-type: none"> 3rd Party Caregiver Code HHAExchange Caregiver Code HHAExchange unique ID The Agency's Management System can decide which value to send in the Schedule file. HHAX needs to know which value the Agency is sending, before activating data exchange interfaces. Agency can send a "TEMP" Caregiver value if/when removing the Caregiver from a 3rd party system. If "TEMP" is received for Caregiver Code, the existing Caregiver is replaced with "Temp" Caregiver in HHAExchange.	Text	Y	20	C
Schedule ID	Unique Schedule ID in the Agency's Management System. The same ID should be used when sending Visit Confirmation File.	Text	Y	20	D
Schedule Date	Format: YYYY-MM-DD	Date	Y	10	E
Schedule Start Time	Schedule Start Time - YYYY-MM-DD HH:MM as per Agency's Timezone	Date /Time	Y	16	F
Schedule End Time	Schedule End Time - YYYY-MM-DD HH:MM as per Agency's Timezone	Date /Time	Y	16	G
Billing Service Code	Valid Billing Service Code that exists in HHAX. Service codes should be setup in the Agency as part of the initial interface setup.	Text	Y	50	H
Is Deletion	Possible Values: Y (Yes) or N (No) If "Y", then Schedule with given "Schedule ID" is deleted (for not confirmed visits)	Text	N	1	I
Payer ID	ID of the Payer in HHAExchange.	Number	Y	10	J
POC ID	Unique ID of the POC Entry in HHAExchange.	Number	N	10	K
User Field 1		Text	N	500	L
User Field 2		Text	N	500	M
User Field 3		Text	N	500	N
User Field 4		Text	N	500	O
User Field 5		Text	N	500	P
User Field 6		Text	N	500	Q

Schedules Import

Sample Template: Click [Schedules 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.*

Field	Description	Data Type	Required	Max Length	Cell
User Field 7		Text	N	500	R

Additional Visits Info Import

This interface must be used in conjunction with the Caregiver and Schedules Import interfaces.

Additional Visits Info Import					
<p align="center">Sample Template: Click Additional Visits Info Import</p> <p><i>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.</i></p>					
Field	Description	Data Type	Required	Max Length	Cell
Agency ID	ID of the Agency in HHAExchange.	Number	Y	10	A
Payer ID	ID of the Payer in HHAExchange.	Number	Y	10	B
Schedule ID	Unique Schedule ID in Agency's Management System. This should be the same ID received in the Schedule File.	Text	Y	20	C
Missed Visit	Possible Values: Y (Yes) or N (No)	Text	N	1	D
Missed Visit Reason	Required if Missed Visit is "Y" Contact HHAExchange Technical Support for the EDI Code Table Guide, Missed Visit Reason Code Table for defined values.	Number	S	3	E
Missed Visit Action Taken	Contact HHAExchange Technical Support for the EDI Code Table Guide, Missed Visit Action Taken Code Table for defined values.	Number	N	2	F
Missed Visit Notes	Visit notes	Text	N	1000	G
Cancel Missed Visit	Possible Values: Y (Yes) or N (No) If "Y", then the missed visit is removed from HHAX and schedule reappears (if the visit is not yet billed in HHAX). If the visit is already billed in HHAX, then this flag is ignored.	Text	N	1	H
Cancel Missed Visit Reason Code	Contact HHAExchange Technical Support for the EDI Code Table Guide, Visit Edit Reason Codes Table for defined values.	Number	N	3	I
Cancel Missed Visit Action Taken	Contact HHAExchange Technical Support for the EDI Code Table Guide, Visit Edit Action Taken Codes Table for defined values.	Number	N	2	J
Cancel Missed Visit Notes		Text	N	1000	K
Travel Time Request Hours	Format: HHMM	Number	N	4	L
Travel Time Comments		Text	N	500	M
Cancel Travel Time Request	Possible Values: Y (Yes) or N (No)	Text	N	1	N
Timesheet Required	Possible Values: Y (Yes) or N (No)	Text	N	1	O
Timesheet Approved	Possible Values: Y (Yes) or N (No)	Text	N	1	P
User Field 1		Text	N	500	Q
User Field 2		Text	N	500	R
User Field 3		Text	N	500	S
User Field 4		Text	N	500	T
User Field 5		Text	N	500	U
User Field 6		Text	N	500	V
User Field 7		Text	N	500	W

Confirmed Visits Import

Schedules or updates schedule/visit information based on the information provided through flat files in the format given below.

Confirmed Visits Import					
Sample Template: Click Confirmed Visits 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.					
Field	Description	Data Type	Required	Max Length	Cell
Agency ID	ID of the Agency in HHAExchange.	Number	Y	10	A
Patient ID	Member identifier. Possible values <ul style="list-style-type: none"> • HHAExchange unique ID • MCO Member ID • Medicaid Number • MR Number The Agency's Management System can decide which value to send in the Confirmed Visit file. HHAX needs to know which value the Agency is sending, before activating data exchange interfaces.	Text	Y	50	B
Caregiver Code	Caregiver identifier. Possible Values <ul style="list-style-type: none"> • 3rd Party Caregiver Code • HHAExchange Caregiver Code • HHAExchange unique ID The Agency's Management System can decide which value to send in the Confirmed Visit file. HHAX needs to know which value the Agency is sending, before activating data exchange interfaces. Agency can send a "TEMP" Caregiver value if/when removing the Caregiver from a 3rd party system. If "TEMP" is received for Caregiver Code, the existing Caregiver is replaced with "Temp" Caregiver in HHAExchange.	Text	Y	20	C
Schedule ID	Unique Schedule ID. This should be the same ID received in the Schedule File.	Text	Y	20	D
Schedule Start Time	Schedule Start Time - YYYY-MM-DD HH:MM as per Agency's Timezone	Date/Time	Y	16	E
Schedule End Time	Schedule End Time - YYYY-MM-DD HH:MM as per Agency's Timezone	Date/Time	Y	16	F
Visit Start Time	Visit Start Time - YYYY-MM-DD HH:MM as per Agency's Timezone	Date/Time	Y	16	G
Visit End Time	Visit End Time - YYYY-MM-DD HH:M as per Agency's Timezone	Date/Time	N	16	H
IVR Start Time	EVV time if visit is confirmed via IVR system - YYYY-MM-DD HH:MM as per Agency's Timezone	Date/Time	N	16	I
IVR End Time	EVV time if visit is confirmed via IVR system: YYYY-MM-DD HH:MM as per Agency Timezone	Date/Time	N	16	J
Duties	Pipe () separated list of the duties; for example, 016 021 023 027 (using existing HHAX Duty Codes). Refused Duties are denoted by adding an asterisk (*) before the Duty Code. Example: 016 *021 023 *027 - "021" and "027" are imported as refused duties.	Text	N	100	K

Confirmed Visits Import

Sample Template: Click [Confirmed Visits 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.

Field	Description	Data Type	Required	Max Length	Cell
Call In Phone Number	Caller ID - If the visit start time is confirmed by IVR	Number	N	10	L
Call Out Phone Number	Caller ID - If visit end time is confirmed by IVR	Number	N	10	M
Billing Service Code	Billing Service Code	Text	Y	50	N
Visit Edit Reason Code	Contact HHAExchange Technical Support for the EDI Code Table Guide, Visit Edit Reason Code Table for defined values.	Number	N	3	O
Visit Edit Action Taken	Contact HHAExchange Technical Support for the EDI Code Table Guide, Visit Edit Action Taken Code Table for defined values.	Number	N	2	P
Notes	Visit notes	Text	N	1000	Q
Payer ID	ID of the Payer in HHAExchange.	Number	Y	10	R
Is Deletion	Possible Values: Y (Yes) or N (No) If "Y", then the Visit is deleted from HHAX (if the Visit is not yet billed in HHAX). If the Visit is already billed in HHAX, then this flag is ignored.	Text	N	1	S
User Field 1		Text	N	500	T
User Field 2		Text	N	500	U
User Field 3		Text	N	500	V
User Field 4		Text	N	500	W
User Field 5		Text	N	500	X
User Field 6		Text	N	500	Y
User Field 7		Text	N	500	Z

Billed Visits Import

Visits billed in an Agency’s Management System can be imported into HHAExchange. The import process confirms the visits based on the incoming information and tries to bill them. One or more invoices are created in HHAExchange for the visits that pass all the billing validations.

Visits that fail billing validation are held in the pre-billing page in HHAX and are exported in the Billing Exceptions Export File.

Billed Visits Import					
Sample Template: Click Billed Visits Import <i>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.</i>					
Field	Description	Data Type	Required	Max Length	Cell
Agency ID	ID of the Agency in HHAExchange.	Number	Y	10	A
Patient ID	Member identifier. Possible values <ul style="list-style-type: none"> • HHAExchange unique ID • MCO Member ID • Medicaid Number • MR Number The Agency’s Management System can decide which value to send in the Billed Visit file. HHAX needs to know which value the Agency is sending, before activating data exchange interfaces.	Text	Y	50	B
Caregiver Code	Caregiver identifier. Possible Values <ul style="list-style-type: none"> • 3rd Party Caregiver Code • HHAExchange Caregiver Code • HHAExchange unique ID The Agency’s Management System can decide which value to send in the Billed Visit file. HHAX needs to know which value the Agency is sending, before activating data exchange interfaces. Agency can send a "TEMP" Caregiver value if/when removing the Caregiver from a 3rd party system. If "TEMP" is received for Caregiver Code, the existing Caregiver is replaced with "Temp" Caregiver in HHAExchange.	Text	Y	20	C
Schedule ID	Unique Schedule ID in Agency’s Management System. This should be the same ID received in the Schedule File.	Text	Y	20	D
Schedule Start Time	Schedule Start Time - YYYY-MM-DD HH:MM as per Agency’s Timezone	Date/Time	Y	16	E
Schedule End Time	Schedule End Time - YYYY-MM-DD HH:MM as per Agency’s Timezone	Date/Time	Y	16	F
Visit Start Time	Visit Start Time - YYYY-MM-DD HH:MM as per Agency’s Timezone	Date/Time	Y	16	G
Visit End Time	Visit End Time - YYYY-MM-DD HH:M as per Agency’s Timezone	Date/Time	Y	16	H
IVR Start Time	EVV time if visit is confirmed via IVR - YYYY-MM-DD HH:MM as per Agency’s Timezone	Date/Time	N	16	I
IVR End Time	EVV time if visit is confirmed via IVR - YYYY-MM-DD HH:MM as per Agency’s Timezone	Date/Time	N	16	J
Duties	Pipe () separated list of the duties; for example, 016 021 023 027 (using existing HHAX Duty Codes).	Text	N	1000	K

Billed Visits Import

Sample Template: Click [Billed Visits 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.

Field	Description	Data Type	Required	Max Length	Cell
	Refused Duties are denoted by adding an asterisk (*) before the Duty Code. Example: 016 *021 023 *027 - "021" and "027" are imported as refused duties.				
Call In Phone Number	Caller ID - If the visit start time is confirmed by IVR	Number	N	10	L
Call Out Phone Number	Caller ID - If visit end time is confirmed by IVR	Number	N	10	M
Invoice Number	Invoice number in Agency's Management System.	Text	Y	18	N
Billing Service Code	Billing Service Code	Text	Y	50	O
Visit Edit Reason Code	Contact HHAExchange Technical Support for the EDI Code Table Guide, Visit Edit Reason Code Table for defined values.	Number	N	3	P
Visit Edit Action Taken	Contact HHAExchange Technical Support for the EDI Code Table Guide, Visit Edit Action Taken Code Table for defined values.	Number	N	2	Q
Notes	Visit Notes	Text	N	1000	R
Is Deletion	Possible Values: Y (Yes) or N (No) If "Y", then the invoice number is cleared from HHAX (if the visit is not yet billed in HHAX). If the visit is already billed in HHAX, then this flag is ignored.	Text	N	1	S
Payer ID	ID of the Payer in HHAExchange.	Number	Y	10	T
Invoice Line Item ID	Unique identifier of the invoice line item in the 3rd party system	Text	N	30	U
User Field 1		Text	N	500	V
User Field 2		Text	N	500	W
User Field 3		Text	N	500	X
User Field 4		Text	N	500	Y
User Field 5		Text	N	500	Z
User Field 6		Text	N	500	AA
User Field 7		Text	N	500	AB