



# Homecare EDI Export Interface Guide (v4)

July 2019

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## Document Revision History

Date	Description of Revision
09/20/2018	Initial version of the document
11/19/2018	Added Response File section
11/30/2018	Additional Export files now available upon request: <ul style="list-style-type: none"> <li>• Patient Demographics</li> <li>• Patient POC</li> <li>• Patient Authorization</li> </ul>
12/31/2018	Updated all “Agency ID” references to “Agency Tax ID” throughout document <ul style="list-style-type: none"> <li>• Changed field Type of Agency Tax ID from Number to Text</li> <li>• Updated all Sample Export Files for Agency Tax ID</li> </ul>
04/12/2019	Added: <a href="#">SFTP Retention Policy</a>
05/29/2019	Added: <b>Patient Authorization Blackout Dates Export Interface</b> <b>Patient Authorization Export Interface</b> <ul style="list-style-type: none"> <li>• Updates: <b>User Field 1</b> (Diagnosis Code 1) and <b>User Field 2</b> (Agency Office NPI)</li> </ul>
07/23/2019	<b>Patient Authorization Export Interface</b> Updates: <b>User Field 3</b> (Diagnosis Code 2) and <b>User Field 4</b> (Diagnosis Code 3)

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## Introduction

The **HHAeXchange (HHAX) Export Interface Guide** offers guidance and instructions in understanding the files and formats created by HHAX and exported to an SFTP site. Herein users find the various interface formats for these export files.

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 for the electronic data interchange (EDI) between HHAX and an Agency Management System through an SFTP (Secure File Transfer Protocol).

## EDI Assistance

If additional assistance is needed, please submit a ticket to [EDISupport@hhaexchange.com](mailto:EDISupport@hhaexchange.com). Cases are escalated to the EDI Production Support queue. An available Support Team Members will contact you directly to assist.

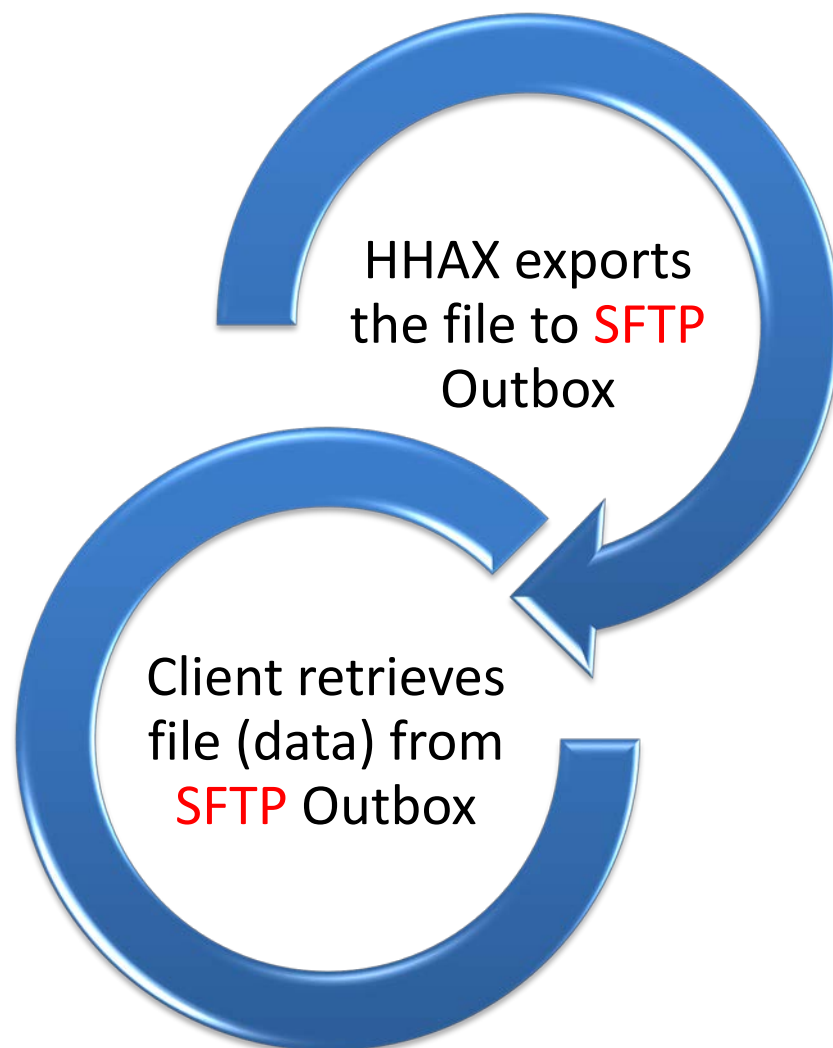
## Understanding the EDI Process

### What is EDI?

**Electronic Data Interchange (EDI)** is the electronic interchange of business information using a standardized format; a process which allows one system to send information to another system electronically rather than with paper. Business entities conducting business electronically are called trading partners.

### Export Process Flow

The image below illustrates the high-level process flow currently in place when HHAX exports files.



HHAX EDI Export Process Flow

## SFTP and 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. HHAX provides SFTP credentials once an Agency has validated their file format.

### SFTP Client Configuration Requirements

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

- HOST/IP/URL: **sftpprod.hhaexchange.com**
- Username: **Enter the user name received from HHAeXchange**
- Password: **Enter the password received from HHAeXchange**
- Port: **2222**
- 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** – The export files are automatically placed by the HHAX system in the Outbox folder.

### 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 Export interface.

Integration Guide			
Interface File	Direction	SFTP Folder	Description
Billing Exceptions	Export	Outbox\BillingExceptions	Exports confirmed visits that are not billable
Billed/Processed Visits	Export	Outbox\BilledVisits	Exports Billed visits
Pre-Adjudication Rejections	Export	Outbox\PreAdjRejections	Exports Billed visits that are not sent to the payer due to validation failures
Patient Demographics*	Export	Outbox\Patient	Exports Patient Demographic information

Integration Guide			
Interface File	Direction	SFTP Folder	Description
POC*	Export	Outbox\POC	Exports Patient Plan of Care information
Patient Authorization*	Export	Outbox\Authorization	Exports Patient Authorization information
Patient Authorization Blackout Dates*	Export	Outbox\Authorization	Exports Patient Authorization Blackout Dates
Response File	Response	Outbox\ResponseFiles	Folder to hold Response Files for processed files

\*Available upon request

## File Format

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

## Naming Convention & File Frequency

This naming convention and frequency is applicable to all export files, as noted in the table below.

HHAX Export Interface File Information File Name and Frequency			
Interface	SFTP Folder	File Name	Frequency
Billing Exceptions	Outbox\BillingExceptions	EDIExport_AgencyTaxID_PayerID_BillingExceptionsV4_YYYYMMDDHHMMSS.csv	After processing billed visit file & once every night (Weekdays).
Pre-Adjudication Rejections	Outbox\PreAdjRejections	EDIExport_AgencyTaxID_PayerID_PreAdjRejectionsV4_YYYYMMDDHHMMSS.csv	<b>Incremental:</b> N/A <b>Full File:</b> every night
Billed /Processed Visits	Outbox\BilledVisits	Incremental File: EDIExport_AgencyTaxID_PayerID_BilledVisitsV4_YYYYMMDDHHMMSS.csv  Full File: EDIExport_AgencyTaxID_PayerID_BilledVisitsV4_YYYYMMDDHHMMSS_Full.csv	Visits billed during the day are exported every night. Billed visits for last 180 days (by visit date) are exported once every weekend.
Patient Demographics*	Outbox\Patient	Incremental File: EDIExport_AgencyTaxID_PayerID_PATDemV4_YYYYMMDDHHMMSS.csv  Full File: EDIExport_AgencyTaxID_PayerID_PATDemV4_YYYYMMDDHHMMSS_Full.csv	<b>Incremental:</b> Once every night <b>Full File:</b> Every Weekend (All active patients + modified in the last 30 days)
POC*	Outbox\POC	Incremental: EDIExport_AgencyTaxID_PayerID_POCV4_YYYYMMDDHHMMSS.csv  Full:	<b>Incremental:</b> Once every night

HHAX Export Interface File Information			
File Name and Frequency			
Interface	SFTP Folder	File Name	Frequency
		EDIExport_AgencyTaxID_PayerID_POCV4_YYYYMMDDHHMMSS_Full.csv	<b>Full File:</b> Every Weekend (POC for all active patients and POC records modified in the last 30 days)
<b>Patient Authorization*</b>	Outbox\ Authorization	Incremental File: EDIExport_AgencyTaxID_PayerID_PatAuthV4_YYYYMMDDHHMMSS.csv  Full File: EDIExport_AgencyTaxID_PayerID_PatAuthV4_YYYYMMDDHHMMSS_Full.csv	<b>Incremental:</b> Once every night <b>Full File</b> Every Weekend (Authorizations for all active patients + authorizations modified in the last 30 days)
<b>Patient Authorization Blackout Dates*</b>	Outbox\ Authorization	EDIExport_AgencyTaxID_PayerID_PatAuthBlackoutDatesV4_YYYYMMDDHHMMSS_Full.CSV	<b>Incremental:</b> N/A <b>Full File</b> every night

\*Available upon request

To elaborate, the following example explains the naming convention:

File Name: **EDIExport\_123456789\_456\_BillingExceptionsV4\_20180115080030.CSV**

**EDIExport** = Hardcoded

**123456789** = Agency Tax ID

**456** = Payer ID

**BillingExceptionsV4** = File type identifier (Billing Exceptions)

**20180115** = Date in YYYYMMDD format

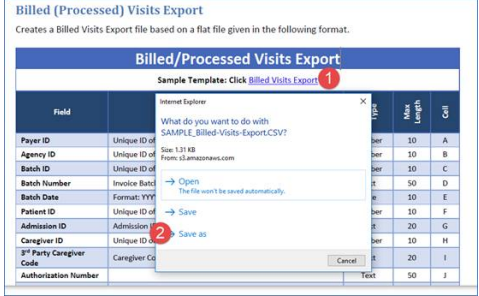
**080030** = Time Stamp in HHMMSS format

HHAX saves all files with 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	Action
1	Click on the desired Template link.	
2	Select <b>Save As</b> and save as a *.csv file onto the workstation when prompted by the system.	
3	To open the file from the workstation, select <b>Open With</b> and select a text editor (such as Notepad). This preserves the formats for each field.	

# Export Interfaces – Required Fields and Formats

HHAX Flat File Data Exchange interfaces support the below-listed exports from HHAX to the SFTP Outbox folder. All interfaces and applicable file formats are explained in the following tables.

- Billing Exceptions Export
- Billed/Processed Visits Export
- Pre-Adjudication Rejections Export
- Response Files

The following exports are available upon request.

- Patient Demographics Export
- POC Export
- Patient Authorizations Export
- Patient Authorization Blackout Dates

## Billing Exceptions Export

Creates a Billing Exceptions Export file based on a flat file given in the following format.

Billing Exceptions Export				
<b>Sample Template: Click <a href="#">Billing Exceptions Export</a></b> <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	Max Length	Cell
<b>Payer ID</b>	ID of the Payer in HHAeXchange.	Number	10	A
<b>Agency Tax ID</b>	Tax ID of the Agency.	Text	20	B
<b>Patient ID</b>	Unique ID of the Patient in HHAeXchange.	Number	10	C
<b>Admission ID</b>	Patient Admission ID.	Text	80	D
<b>Caregiver ID</b>	Unique ID of the Caregiver in HHAeXchange.	Number	10	E
<b>3<sup>rd</sup> Party Caregiver Code</b>	Internal Caregiver Code received from the Agency’s Management System.	Text	20	F
<b>Coordinator Name</b>	Name of the agency’s coordinator.	Text	50	G
<b>Schedule ID</b>	Unique ID of the Schedule in HHAeXchange.	Number	10	H
<b>3<sup>rd</sup> Party Schedule ID</b>	Schedule ID received from the Agency’s Management System	Text	20	I
<b>Schedule Date</b>	Format: YYYY-MM-DD	Date	10	J
<b>Schedule Start</b>	Schedule Start Time - YYYY-MM-DD HH:MM as per Agency’s Timezone	Date/Time	16	K
<b>Schedule End</b>	Schedule End Time - YYYY-MM-DD HH:MM as per Agency’s Timezone	Date/Time	16	L
<b>Billing Service Code</b>	Billing Service Code	Text	50	M
<b>Visit Start</b>	Visit Start Time - YYYY-MM-DD HH:MM as per Agency’s Timezone	Date/Time	16	N
<b>Visit End</b>	Visit End Time - YYYY-MM-DD HH:MM as per Agency’s Timezone	Date/Time	16	O
<b>Problem</b>	Comma separated list of billing validation reasons. See below for a list of Billing Validation Reasons.	Text	500	P

## Billing Exceptions Export

**Sample Template:** Click [Billing Exceptions Export](#)  
*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	Max Length	Cell
<b>3<sup>rd</sup> Party Invoice Number</b>	Invoice number received from the Agency's Management System, if available.	Text	20	Q
<b>User Field 1</b>	Field in layout for future use	Text	500	R
<b>User Field 2</b>	Field in layout for future use	Text	500	S
<b>User Field 3</b>	Field in layout for future use	Text	500	T
<b>User Field 4</b>	Field in layout for future use	Text	500	U
<b>User Field 5</b>	Field in layout for future use	Text	500	V
<b>User Field 6</b>	Field in layout for future use	Text	500	W
<b>User Field 7</b>	Field in layout for future use	Text	500	X

### Billing Validation Reasons

Billing Validation Reasons (Problem)	
Reason	Comments
Unbalanced	
Caregiver Overlapping	
Shift Overlapping	
More than 24 hours	
Unverified Visit	
TT/OT Not Approved	
Temp Caregiver	
Restricted Caregiver	
Caregiver Compliance	
Timesheet Not Approved	
POC Compliance	
No authorization	
Missing HHA/PCA Registry Information	
Scheduled with Hold rate	
Missing Caregiver SSN	

## Billed (Processed) Visits Export

Creates a Billed Visits Export file based on a flat file given in the following format.

Billed/Processed Visits Export				
<b>Sample Template: Click <a href="#">Billed Visits Export</a></b> <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	Max Length	Cell
<b>Payer ID</b>	Unique ID of the Payer in HHAExchange.	Number	10	A
<b>Agency Tax ID</b>	Tax ID of the Agency.	Text	20	B
<b>Batch ID</b>	Unique ID of the Batch in HHAExchange.	Number	10	C
<b>Batch Number</b>	Invoice Batch number in HHAExchange.	Text	50	D
<b>Batch Date</b>	Format: YYYY-MM-DD	Date	10	E
<b>Patient ID</b>	Unique ID of the Patient in HHAExchange.	Number	10	F
<b>Admission ID</b>	Admission ID of the patient.	Text	80	G
<b>Caregiver ID</b>	Unique ID of the Caregiver in HHAExchange.	Number	10	H
<b>3<sup>rd</sup> Party Caregiver Code</b>	Caregiver Code received from the Agency's Management System.	Text	20	I
<b>Authorization Number</b>	Authorization Number	Text	50	J
<b>Schedule ID</b>	Unique ID of the Schedule in HHAExchange.	Number	10	K
<b>3<sup>rd</sup> Party Schedule ID</b>	Schedule ID received from the Agency's Management System.	Text	20	L
<b>Schedule Date</b>	Format: YYYY-MM-DD	Date	10	M
<b>Billing Service Code</b>	Billing Service Code	Text	50	N
<b>Schedule Start Time</b>	Schedule Start Time - YYYY-MM-DD HH:MM	Date/Time	16	O
<b>Schedule End Time</b>	Schedule End Time - YYYY-MM-DD HH:MM	Date/Time	16	P
<b>Visit Start Time</b>	Visit Start Time - YYYY-MM-DD HH:MM	Date/Time	16	Q
<b>Visit End Time</b>	Visit End Time - YYYY-MM-DD HH:MM	Date/Time	16	R
<b>Duties</b>	Pipe ( ) separated list of the duties; e.g., "016 021 023 027"	Text	1024	S
<b>3<sup>rd</sup> Party Invoice Number</b>	Invoice Number received from the Agency's Management System, if available.	Text	20	T
<b>Invoice Date</b>	Invoice Date Format: YYYY-MM-DD	Date	10	U
<b>Invoice Number</b>	Invoice Number in HHAExchange.	Number	10	V
<b>Billed Minutes</b>	Billed Minutes	Number	10	W
<b>Billed Amount</b>	Format: 999999.99	Number	20	X
<b>OT Minutes</b>	Overtime Minutes	Number	10	Y
<b>OT Amount</b>	Format: 999999.99	Number	20	Z
<b>TT Minutes</b>	Travel time Minutes	Number	10	AA
<b>TT Amount</b>	Format: 999999.99	Number	20	AB
<b>Total Invoice Amount</b>	Format: 999999.99	Number	20	AC
<b>User Field 1</b>	Field in layout for future use	Text	500	AD
<b>User Field 2</b>	Field in layout for future use	Text	500	AE
<b>User Field 3</b>	Field in layout for future use	Text	500	AF

## Billed/Processed Visits Export

**Sample Template:** Click [Billed Visits Export](#)

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	Max Length	Cell
User Field 4	Field in layout for future use	Text	500	AG
User Field 5	Field in layout for future use	Text	500	AH
User Field 6	Field in layout for future use	Text	500	AI
User Field 7	Field in layout for future use	Text	500	AJ

## Pre-Adjudication Rejections Export

Creates a Pre-Adjudication Rejections Export file based on a flat file given in the following format.

Pre-Adjudication Rejections Export				
<p><b>Sample Template:</b> Click <a href="#">Pre-Adjudication Rejections Export</a></p> <p>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.</p>				
Field	Description	Data Type	Max Length	Cell
<b>Payer ID</b>	ID of the Payer in HHAExchange.	Number	10	A
<b>Agency Tax ID</b>	Tax ID of the Agency.	Text	20	B
<b>Patient ID</b>	Unique ID of the Patient in HHAExchange.	Number	10	C
<b>Admission ID</b>	Patient Admission ID.	Text	80	D
<b>Caregiver ID</b>	Unique ID of the Caregiver in HHAExchange.	Number	10	E
<b>3<sup>rd</sup> Party Caregiver Code</b>	Caregiver Code received from the Agency's Management System.	Text	20	F
<b>3<sup>rd</sup> Party Schedule ID</b>	Schedule ID received from the Agency's Management System.	Text	20	G
<b>Coordinator Name</b>	Name of the Agency's coordinator.	Text	50	H
<b>Schedule ID</b>	Unique ID of the Schedule in HHAExchange.	Number	10	I
<b>Schedule Date</b>	Format: YYYY-MM-DD	Date	10	J
<b>Schedule Start</b>	Schedule Start Time - YYYY-MM-DD HH:MM as per Agency's Timezone	Date/Time	16	K
<b>Schedule End</b>	Schedule End Time - YYYY-MM-DD HH:MM as per Agency's Timezone	Date/Time	16	L
<b>Billing Service Code</b>	Billing Service Code	Text	50	M
<b>Visit Start</b>	Visit Start Time - YYYY-MM-DD HH:MM as per Agency's Timezone	Date/Time	16	N
<b>Visit End</b>	Visit End Time - YYYY-MM-DD HH:MM as per Agency's Timezone	Date/Time	16	O
<b>Hold Reasons</b>	Comma separated list of the reasons for rejection.	Text	500	P
<b>3<sup>rd</sup> Party Invoice Number</b>	Invoice# received from the Agency's Management System, if available.	Text	20	Q
<b>Invoice Date</b>	Format: YYYY-MM-DD	Date	10	R
<b>Invoice Number</b>	Invoice Number in HHAExchange.	Number	10	S
<b>Billed Units</b>	Units in decimal format	Number	10	T
<b>Billed Amount</b>	Billed Amount	Number	10	U
<b>User Field 1</b>	Field in layout for future use	Text	500	V
<b>User Field 2</b>	Field in layout for future use	Text	500	W
<b>User Field 3</b>	Field in layout for future use	Text	500	X
<b>User Field 4</b>	Field in layout for future use	Text	500	Y
<b>User Field 5</b>	Field in layout for future use	Text	500	Z
<b>User Field 6</b>	Field in layout for future use	Text	500	AA
<b>User Field 7</b>	Field in layout for future use	Text	500	AB

## \* Patient Demographic Export

Creates a Patient Demographic Export file based on a flat file given in the following format.

\* Available upon request.

Patient Demographics Export				
<b>Sample Template: Click <a href="#">Patient Demographic Export</a></b> 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	Max Length	Cell
<b>Payer ID</b>	Unique ID of the Payer in HHAExchange.	Number	10	A
<b>Agency Tax ID</b>	Tax ID of the Agency.	Text	20	B
<b>Patient ID</b>	Unique ID of the Patient in HHAExchange. This field should be used as the key for all electronic data exchanges.	Number	10	C
<b>Admission ID</b>	Patient Admission ID	Text	80	D
<b>First Name</b>	First Name	Text	50	E
<b>Middle Name</b>	Middle Name	Text	50	F
<b>Last Name</b>	Last name	Text	50	G
<b>MR Number</b>	MR Number of Patient (this field is displayed as <i>Patient ID</i> in HHAExchange).	Text	50	H
<b>Gender</b>	Possible Values (M/F/U)	Text	1	I
<b>DOB</b>	Format: YYYY-MM-DD	Date	10	J
<b>Priority Code</b>	MCO Priority Code	Number	1	K
<b>Medicaid Number</b>	Medicaid Number	Text	20	L
<b>Street 1</b>	Address 1	Text	500	M
<b>Street 2</b>	Address 2	Text	50	N
<b>City</b>	City	Text	50	O
<b>State</b>	State	Text	50	P
<b>Zip</b>	Zip	Number	9	Q
<b>Cross Street</b>	Cross Street	Text	80	R
<b>Home Phone</b>	Format: XXX-XXX-XXXX	Text	12	S
<b>Phone 2</b>	Format: XXX-XXX-XXXX	Text	12	T
<b>Phone 2 Description</b>	Phone 2 Description	Text	50	U
<b>Phone 3</b>	Format: XXX-XXX-XXXX	Text	12	V
<b>Phone 3 Description</b>	Phone 3 Description	Text	50	W
<b>Emergency 1 Name</b>	Emergency 1 Name	Text	50	X
<b>Emergency 1 Address</b>	Emergency 1 Address	Text	50	Y
<b>Emergency 1 Relationship</b>	Emergency 1 Relationship	Text	50	Z
<b>Emergency 1 Phone 1</b>	Format: XXX-XXX-XXXX	Text	12	AA
<b>Emergency 1 Phone 2</b>	Format: XXX-XXX-XXXX	Text	12	AB
<b>Emergency 2 Name</b>	Emergency 2 Name	Text	50	AC
<b>Emergency 2 Address</b>	Emergency 2 Address	Text	50	AD

## Patient Demographics Export

**Sample Template:** Click [Patient Demographic Export](#)

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	Max Length	Cell
<b>Emergency 2 Relationship</b>	Emergency 2 Relationship	Text	50	AE
<b>Emergency 2 Phone 1</b>	Format: XXX-XXX-XXXX	Text	12	AF
<b>Emergency 2 Phone 2</b>	Format: XXX-XXX-XXXX	Text	12	AG
<b>Status</b>	Patient Status <ul style="list-style-type: none"> <li>• Waiting</li> <li>• Pending</li> <li>• Active</li> <li>• Hospitalized</li> <li>• Discharged</li> <li>• Hold</li> </ul>	Text	50	AH
<b>Start of Care Date</b>	Format: YYYY-MM-DD	Date	10	AI
<b>Discharge Date</b>	Format: YYYY-MM-DD	Date	10	AJ
<b>Payer Coordinator</b>	Name of Payer Coordinator.	Text	100	AK
<b>Agency Coordinator</b>	Name of Agency Coordinator.	Text	100	AL
<b>Frequency</b>	Frequency	Text	50	AM
<b>Source of Admission</b>	Possible values: <ul style="list-style-type: none"> <li>• Assistant live-in facilities</li> <li>• CHHA</li> <li>• Hospice</li> <li>• Hospital</li> <li>• LHCSA</li> <li>• Local social services/Casa</li> <li>• LTHHCP</li> <li>• MCO</li> <li>• MLTC</li> <li>• Other</li> <li>• Other community agency</li> <li>• Other Institution</li> <li>• Physician</li> <li>• RHCF</li> <li>• Self/Family/Friend</li> </ul>	Text	50	AN
<b>Location</b>	Patient's Location	Text	100	AO
<b>Team</b>	Patient's Team	Text	100	AP
<b>Branch</b>	Patient's Branch	Text	100	AQ
<b>Modified Date</b>	Modified/Created time in UTC Format: YYYY-MM-DD HH:MM:SS.MSS	Date/Time	25	AR
<b>Is Deletion</b>	Always "N". Reserved for future use.	Text	1	AS
<b>Alternate Patient ID</b>	Alternate Patient ID	Text	50	AT
<b>User Field 1</b>		Text	500	AU
<b>User Field 2</b>		Text	500	AV
<b>User Field 3</b>		Text	500	AW
<b>User Field 4</b>		Text	500	AX
<b>User Field 5</b>		Text	500	AY
<b>User Field 6</b>		Text	500	AZ
<b>User Field 7</b>		Text	500	BA



## \* Plan of Care (POC) Export

Creates a POC Export file based on a flat file given in the following format.

\* Available upon request.

POC Export				
<b>Sample Template: Click <a href="#">POC Export</a></b> <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	Max Length	Cell
Payer ID	Unique ID of the Payer in HHAExchange.	Number	10	A
Agency Tax ID	Tax ID of the Agency.	Text	20	B
Patient ID	Unique ID of the Patient in HHAExchange.	Number	10	C
POC ID	Unique ID of the POC Entry in HHAExchange.	Number	10	D
POC Start Date	Format: YYYY-MM-DD	Date	10	E
POC Stop Date	Format: YYYY-MM-DD	Date	10	F
POC Note	Notes	Text	2000	G
POC Tasks	Pipe separated list of POC task codes	Text	1000	H
Created Date	Format: YYYY-MM-DD HH:MM	Date/Time	16	I
Is Deletion	Always "N". Reserved for future use.	Text	1	J
User Field 1		Text	500	K
User Field 2		Text	500	L
User Field 3		Text	500	M
User Field 4		Text	500	N
User Field 5		Text	500	O
User Field 6		Text	500	P
User Field 7		Text	500	Q

## \* Patient Authorization Export

Creates a Patient Authorization Export file based on a flat file given in the following format.

\* Available upon request.

Patient Authorization Export				
<b>Sample Template:</b> Click <a href="#">Patient Authorization Export</a> 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	Max Length	Cell
<b>Payer ID</b>	Unique ID of the Payer in HHAeXchange.	Number	10	A
<b>Agency Tax ID</b>	Tax ID of the Agency.	Text	20	B
<b>Patient ID</b>	Internal Unique ID of the Patient in HHAeXchange.	Number	10	C
<b>Authorization ID</b>	Unique ID of the Patient in HHAeXchange	Number	10	D
<b>Admission ID</b>	Patient Admission ID.	Text	20	E
<b>Service Category</b>	Service category such as "Home Health" or any other valid service category.	Text	50	F
<b>Service Type</b>	One of the following: <ul style="list-style-type: none"> <li>• PCA</li> <li>• HHA</li> <li>• RN</li> <li>• LPN</li> <li>• PT</li> <li>• OT</li> <li>• ST</li> <li>• MSW</li> <li>• HSK</li> <li>• NT</li> <li>• RT</li> <li>• PA</li> <li>• HCSS</li> <li>• CAN</li> <li>• Other (Non-Skilled)</li> <li>• Other (Skilled)</li> </ul>	Text	50	G
<b>Authorization Number</b>	Authorization Number	Text	50	H
<b>Billing Service Code</b>	Billing Service Code	Text	50	I
<b>From Date</b>	Format: YYYY-MM-DD	Date	10	J
<b>To Date</b>	Format: YYYY-MM-DD	Date	10	K
<b>Authorization Type</b>	Possible Values: <ul style="list-style-type: none"> <li>• Daily</li> <li>• Weekly</li> <li>• Monthly</li> <li>• Entire Period</li> </ul>	Text	50	L
<b>Hours Per Week</b>	Applicable if Authorization Type is "Weekly"	Number	10	M
<b>Hours Per Month</b>	Applicable if Authorization Type is "Monthly"	Number	10	N
<b>Hours Per Auth Period</b>	Applicable if Authorization Type is "Entire Period"	Number	10	O
<b>Sat Hours</b>	Authorized hours for Saturday; Format HHMM	Number	4	P
<b>Sat Start Time</b>	One of the following: "ANY", "DAYSHIFT", "NIGHTSHIFT", "AM", "PM", "BETWEEN"	Text	20	Q
<b>Sat Between From Time</b>	Format: HHMM: Applicable if "Start Time" is "BETWEEN"	Number	4	R
<b>Sat Between To Time</b>	Format: HHMM: Applicable if "Start Time" is "BETWEEN"	Number	4	S
<b>Sun Hours</b>	Format: HHMM	Number	4	T
<b>Sun Start Time</b>	One of the following: "ANY", "DAYSHIFT", "NIGHTSHIFT", "AM", "PM", "BETWEEN"	Text	20	U

## Patient Authorization Export

**Sample Template:** Click [Patient Authorization Export](#)

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	Max Length	Cell
Sun Between From Time	Format: HHMM	Number	4	V
Sun Between To Time	Format: HHMM	Number	4	W
Mon Hours	Format: HHMM	Number	4	X
Mon Start Time	One of the following: "ANY", "DAYSHIFT", "NIGHTSHIFT", "AM", "PM", "BETWEEN"	Text	20	Y
Mon Between From Time	Format: HHMM	Number	4	Z
Mon Between To Time	Format: HHMM	Number	4	AA
Tue Hours	Format: HHMM	Number	4	AB
Tue Start Time	One of the following: "ANY", "DAYSHIFT", "NIGHTSHIFT", "AM", "PM", "BETWEEN"	Text	20	AC
Tue Between From Time	Format: HHMM	Number	4	AD
Tue Between To Time	Format: HHMM	Number	4	AE
Wed Hours	Format: HHMM	Number	4	AF
Wed Start Time	One of the following: "ANY", "DAYSHIFT", "NIGHTSHIFT", "AM", "PM", "BETWEEN"	Text	20	AG
Wed Between From Time	Format: HHMM	Number	4	AH
Wed Between To Time	Format: HHMM	Number	4	AI
Thu Hours	Format: HHMM	Number	4	AJ
Thu Start Time	One of the following: "ANY", "DAYSHIFT", "NIGHTSHIFT", "AM", "PM", "BETWEEN"	Text	20	AK
Thu Between From Time	Format: HHMM	Number	4	AL
Thu Between To Time	Format: HHMM	Number	4	AM
Fri Hours	Format: HHMM	Number	4	AN
Fri Start Time	One of the following: "ANY", "DAYSHIFT", "NIGHTSHIFT", "AM", "PM", "BETWEEN"	Text	20	AO
Fri Between From Time	Format: HHMM	Number	4	AP
Fri Between To Time	Format: HHMM	Number	4	AQ
Notes	Notes	Text	500	AR
Modified Date	Modified/Created time in UTC Format: YYYY-MM-DD HH:MM:SS.MSS	Date/Time	25	AS
Is Deletion	Possible Values: <b>Y</b> (Yes) or <b>N</b> (No)	Text	1	AT
Additional Rules	Possible Values: <b>Y</b> (Yes) or <b>N</b> (No) This field can have value "Y" only when "Authorization Type" is set as <i>Weekly</i> , <i>Monthly</i> , or <i>Entire Period</i> . If additional rule is set to "Y", Authorization limits to even more specific levels can be defined with the help of 3 fields "Maximum Visits", "Per" and "Of X Hours"	Text	1	AU
Maximum Visits 1	If Additional Rules = "Y" This field can have whole numbers between 1 and 999	Number	3	AV
Per 1	If Additional Rules = "Y"	Text	13	AW

## Patient Authorization Export

**Sample Template:** Click [Patient Authorization Export](#)

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	Max Length	Cell
	<p>Possible Values: <b>Weekly, Monthly, Entire Period</b></p> <ul style="list-style-type: none"> <li>Value in this field are periods which are “less” than the selected Authorization Period type.</li> <li>If “Entire Period” is set as the Auth Period, the value can be Entire Period, Monthly, or Weekly.</li> <li>If “Monthly” is set as the Auth Period, the value can be Monthly or Weekly.</li> <li>If “Weekly” is set as the Auth Period, the value can be Weekly.</li> </ul>			
<b>Of X Hours 1</b>	<p>Number of hours which can be scheduled for visits under this additional rule. Format: 99.99 There is no value in this field if Service Code entered for the Authorization is for a Daily or Visit type, or no Service Code is entered at all for the Authorization.</p>	Number	5	AX
<b>Maximum Visits 2</b>	This field can have whole numbers between 1 and 999	Number	3	AY
<b>Per 2</b>	<p>Possible Values: <b>Weekly, Monthly, or Entire Period</b></p> <ul style="list-style-type: none"> <li>Value in this field are periods which are “less” than the selected Authorization Period type.</li> <li>If “Entire Period” is set as the Auth Period, the value can be Entire Period or Monthly or Weekly.</li> <li>If “Monthly” is set as the Auth Period, the value can be Monthly or Weekly.</li> <li>If “Weekly” is set as the Auth Period, the value can be Weekly.</li> </ul>	Text	13	AZ
<b>Of X Hours 2</b>	<p>Number of hours which can be scheduled for visits under this additional rule. Format: 99.99 There is NO value in this field if Service Code entered for the Authorization is for a Daily or Visit type, or no Service Code is entered at all for the Authorization.</p>	Number	5	BA
<b>Maximum Visits 3</b>	This field can have whole numbers between 1 and 999	Number	3	BB
<b>Per 3</b>	<p>Possible Values: <b>Weekly, Monthly, or Entire Period</b></p> <ul style="list-style-type: none"> <li>Value in this field are periods which are “less” than the selected Authorization Period type.</li> <li>If “Entire Period” is set as the Auth Period, the value can be Entire Period or Monthly or Weekly.</li> <li>If “Monthly” is set as the Auth Period, the value can be Monthly or Weekly.</li> <li>If “Weekly” is set as the Auth Period, the value can be Weekly.</li> </ul>	Text	13	BC
<b>Of X Hours 3</b>	<p>Number of hours which can be scheduled for visits under this additional rule. Format: 99.99 There is NO value in this field if Service Code entered for the Authorization is for a Daily or Visit type, or no Service Code is entered at all for the Authorization.</p>	Number	5	BD
<b>Maximum Visits 4</b>	This field can have whole numbers between 1 and 999	Number	3	BE
<b>Per 4</b>	Possible Values: <b>Weekly, Monthly, or Entire Period</b>	Text	13	BF

## Patient Authorization Export

**Sample Template:** Click [Patient Authorization Export](#)

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	Max Length	Cell
	<ul style="list-style-type: none"> <li>Value in this field are periods which are “less” than the selected Authorization Period type.</li> <li>If “Entire Period” is set as the Auth Period, the value can be Entire Period or Monthly or Weekly.</li> <li>If “Monthly” is set as the Auth Period, the value can be Monthly or Weekly.</li> <li>If “Weekly” is set as the Auth Period, the value can be Weekly.</li> </ul>			
<b>Of X Hours 4</b>	Number of hours which can be scheduled for visits under this additional rule. Format: 99.99 There is NO value in this field if Service Code entered for the Authorization is for a Daily or Visit type, or no Service Code is entered at all for the Authorization.	Number	5	BG
<b>Maximum Visits 5</b>	This field can have whole numbers between 1 and 999	Number	3	BH
<b>Per 5</b>	Possible Values: <b>Weekly, Monthly, or Entire Period</b> <ul style="list-style-type: none"> <li>Value in this field are periods which are “less” than the selected Authorization Period type.</li> <li>If “Entire Period” is set as the Auth Period, the value can be Entire Period or Monthly or Weekly.</li> <li>If “Monthly” is set as the Auth Period, the value can be Monthly or Weekly.</li> <li>If “Weekly” is set as the Auth Period, the value can be Weekly.</li> </ul>	Text	13	BI
<b>Of X Hours 5</b>	Number of hours which can be scheduled for Visits under this additional rule. Format: 99.99 There is NO value in this field if Service Code entered for the Authorization is for a Daily or Visit type, or no Service Code is entered at all for the Authorization.	Number	5	BJ
<b>Maximum Visits 6</b>	This field can have whole numbers between 1 and 999	Number	3	BK
<b>Per 6</b>	Possible Values: <b>Weekly, Monthly, or Entire Period</b> <ul style="list-style-type: none"> <li>Value in this field are periods which are “less” than the selected Authorization Period type.</li> <li>If “Entire Period” is set as the Auth Period, the value can be Entire Period or Monthly or Weekly.</li> <li>If “Monthly” is set as the Auth Period, the value can be Monthly or Weekly.</li> <li>If “Weekly” is set as the Auth Period, the value can be Weekly.</li> </ul>	Text	13	BL
<b>Of X Hours 6</b>	Number of hours which can be scheduled for visits under this additional rule. Format: 99.99 There is NO value in this field if Service Code entered for the Authorization is for a Daily or Visit type, or no Service Code is entered at all for the Authorization.	Number	5	BM
<b>Maximum Visits 7</b>	This field can have whole numbers between 1 and 999	Number	3	BN
<b>Per 7</b>	Possible Values: <b>Weekly, Monthly, or Entire Period</b>	Text	13	BO

## Patient Authorization Export

**Sample Template:** Click [Patient Authorization Export](#)

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	Max Length	Cell
	<ul style="list-style-type: none"> <li>Value in this field are periods which are “less” than the selected Authorization Period type.</li> <li>If “Entire Period” is set as the Auth Period, the value can be Entire Period or Monthly or Weekly.</li> <li>If “Monthly” is set as the Auth Period, the value can be Monthly or Weekly.</li> <li>If “Weekly” is set as the Auth Period, the value can be Weekly.</li> </ul>			
<b>Of X Hours 7</b>	Number of hours which can be scheduled for visits under this additional rule. Format: 99.99 There is NO value in this field if Service Code entered for the Authorization is for a Daily or Visit type, or no Service Code is entered at all for the Authorization.	Number	5	BP
<b>User Field 1</b>	Diagnosis Code #1	Text	50	BQ
<b>User Field 2</b>	Agency Office NPI	Text	20	BR
<b>User Field 3</b>	Diagnosis Code #2	Text	50	BS
<b>User Field 4</b>	Diagnosis Code #3	Text	50	BT
<b>User Field 5</b>		Text	500	BU
<b>User Field 6</b>		Text	500	BV
<b>User Field 7</b>		Text	500	BW

## \* Patient Authorization Blackout Dates Export

Creates a Patient Authorization Blackout Dates Export file based on a flat file given in the following format.

\* Available upon request.

Patient Authorization Blackout Dates Export				
<p><b>Sample Template:</b> Click <a href="#">Patient Authorization Blackout Dates Export</a></p> <p>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.</p>				
Field	Description	Data Type	Max Length	Cell
<b>Payer ID</b>	Unique Payer ID in HHAX	Number	10	A
<b>Agency ID</b>	Unique Agency ID in HHAX	Number	20	B
<b>Blackout Date ID</b>	Unique record ID	Number	10	C
<b>Authorization ID</b>	Unique Authorization ID in HHAX	Number	10	D
<b>Patient ID</b>	Unique Patient ID in HHAX	Number	10	E
<b>Admission ID</b>	Admission ID of the Patient	Text	80	F
<b>From Date</b>	Format: <b>YYYY-MM-DD</b>	Date	10	G
<b>To Date</b>	Format: <b>YYYY-MM-DD</b>	Date	10	H
<b>Notes</b>		Text	500	I
<b>Modified Date</b>	Modified/Created time in UTC Format: <b>YYYY-MM-DD HH:MM:SS.MSS</b>	Date/Time	25	J
<b>Is Deletion</b>	Always "N". Reserved for future use.	Text	1	K

## Response File

A **Response File** is a report/log that is generated as a result of an import file received and processed. A Response File is only generated when the file has been processed. The Response File consists of the imported records/data with two additional columns to the right of each row indicating record **Status Code** and **Import Status** description. The following table provides the possible Status Codes and descriptions.

Status Code	Import Status
200	Success
201	Agency Tax ID is required.
202	Medicaid Number is required.
203	Caregiver Code is required.
204	Schedule ID is required.
206	Schedule Start Time is required.
207	Schedule End Time is required.
209	Schedule Start Time cannot be greater than Schedule End Time.
210	Visit is already billed.
212	Patient not found in HHAeXchange.
214	Duplicate Caregiver found in HHAeXchange.
215	Procedure Code not found in HHAeXchange.
216	Duplicate Procedure Code found in HHAeXchange.
217	Schedule cannot be imported because Patient is not in Active or Discharged status.
218	Overlapping shifts are not allowed.
220	Caregiver is restricted. No schedule can be created.
221	Schedule ID not found in HHAeXchange.
222	Duplicate Schedule ID found in HHAeXchange.
223	Schedule ID belongs to a different schedule date in HHAeXchange.
224	Schedule ID belongs to a different Patient in HHAeXchange.
226	Invalid Agency Tax ID.
227	Schedule ID exceeds max character length.
228	Invalid format of Clock-In Phone Number.
229	Schedule Duration is 0.
233	Agency is not linked with Payer.
234	Visit having TT cannot be updated.
235	Visit Edit Reason Code not found in HHAeXchange.
236	Visit Edit Action Taken not found in HHAeXchange.
237	Visit Start Time cannot be greater than Visit End Time.
239	EVV Start Time cannot be greater than EVV End Time.
241	Invalid value of Gender.
245	Duplicate Patient found in HHAeXchange.
246	Visit Start Time is required.
247	Visit End Time is required.



Status Code	Import Status
248	Payer ID is required.
249	Procedure Code is required.
250	Missed Visit Reason Code is mandatory when Missed Visit Flag is set to Y.
251	Missed Visit Action Taken Code is mandatory when Missed Visit Flag is set to Y.
252	Schedule cannot be greater than 24 hours.
255	Schedule is marked as 'Missed' visit.
256	Missed Visit with TT cannot be updated.
257	Missed Visit with TT is already billed.
299	Other