



Homecare EDI Import Interface Guide (v4)

May 2021

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Document Revision History

Date	Description of Revision
09/27/2018	Initial version of the document
01/18/2019	Updates as follows: <ul style="list-style-type: none"> • 3rd Party Software disclaimer • SFTP Configurations (samples) • File Requirements – addition of CRLF and Text Editor recommendations
04/12/2019	Updates as follows: <ul style="list-style-type: none"> • SFTP Retention Policy • EDI Import: Invoice Line Item ID (max character limit changed to 30) • EDI Import: EVV related fields requirements updated in alignment with the Cures Act • EDI Import: User Field 1 assignment (Agency Office NPI)
04/10/2020	Update Service Location Description/Format
09/23/2020	Updates to User Field 2 Updates to requirements on multiple fields (from <i>Optional</i> to <i>Situational</i>)
10/06/2020	The Required Fields table moved to respective Code Table Guides (per region)
10/12/2020	Updated description in Caregiver SSN field
10/29/2020	Updates to User Field 3 as Patient Diagnosis Code (field is <i>Situational</i> , <i>Required</i> when visit is confirmed or billed)
11/12/2020	<ul style="list-style-type: none"> • Defined Service Location Field; zip code format • Defined Clock In/Out EVV Other Info; acceptable value
12/10/2020	<ul style="list-style-type: none"> • Defined User Field 4 & 5 as Clock-In/Out Service Location (field is <i>Situational</i>, <i>Required</i> when visit is confirmed or billed)
01/06/2021	<ul style="list-style-type: none"> • Updated User Field 3 field length to 105 characters
02/12/2021	<ul style="list-style-type: none"> • Updated User Field 3 field length to 208 characters
03/01/2021	Updates to the Service Locator field
04/27/2021	Updates to User Fields 2-5.
05/11/2021	Updated description for the following fields: <ul style="list-style-type: none"> • Clock-In/Out Longitude • Clock-In/Out Latitude • Clock-In/Out Phone Number • Clock-In/Out EVV Other Info

Date	Description of Revision
	<ul style="list-style-type: none">• Medicaid ID• Office NPI (User field 1)• Schedule ID• Service Location• Invoice Number

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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.

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.

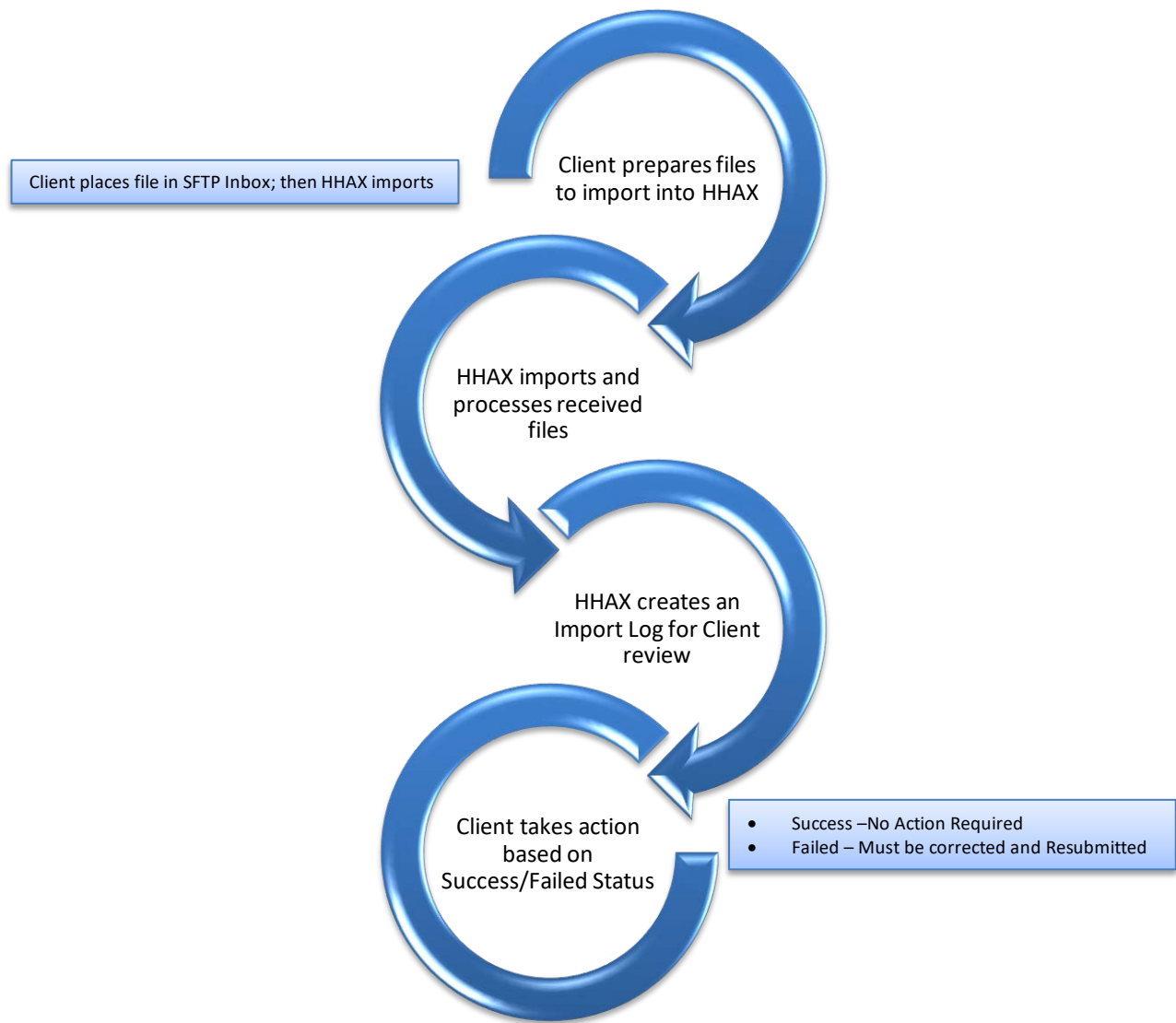
Understanding the EDI Process

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 place 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 (such as *Filezilla*, *CuteFTP*, and *WINSCP*).

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

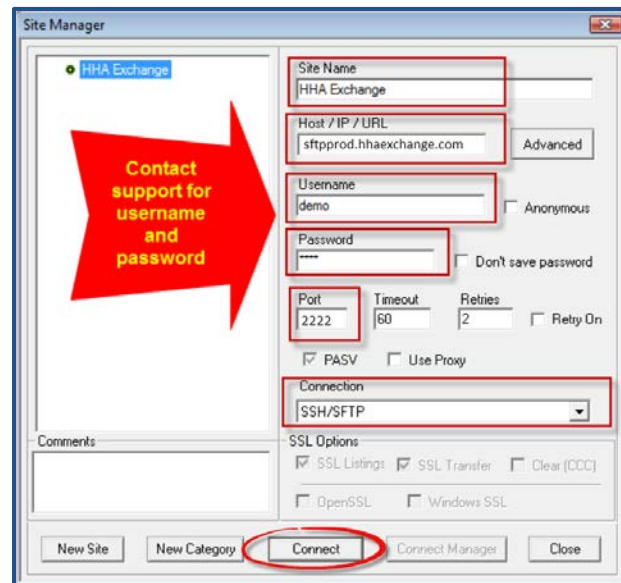


HHAX does not endorse or technically support any particular 3rd Party software. Some examples and images used within this document are exclusively for demonstration purposes.

SFTP Client Configuration Requirements

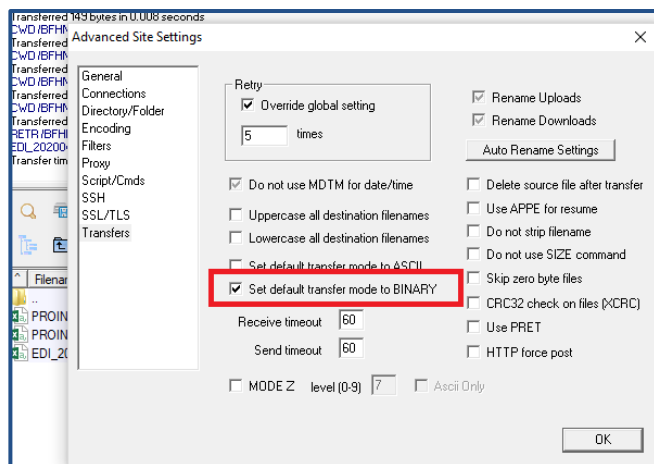
The image to the right illustrates the configuration requirements to connect to the SFTP location.

- 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 Configuration Settings (Sample SFTP Application)

When transferring files via SFTP, select the **BINARY mode** in your FTP client application (sample from sample SFTP application shown to right).



Binary Mode in Advanced Settings (Sample)

HHAX Homecare Import Interface File Information File Name and Frequency

Interface	SFTP Location	File Name	Frequency (SFTP Import Only)
EDI Import	Inbox	EDI_AgencyTaxID_YYYYMMDDHHMMSS.CSV	As/when desired by Client

Note: To minimize errors and ensure system processes are running efficiently, HHAX requests for Agencies to upload the entire file (ALL records starting from go-live date) only on the initial load (first time). Thereafter, all future import files should only contain incremental changes.

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
EDI Import	EDI_AgencyTaxID_YYYYMMDDHHMMSS.CSV

To elaborate, the following example explains the naming convention:

If Tax ID is “987654321” and the file is generated on 07/31/2018 at 8:00 AM, the file name is:

File Name: **EDI_987654321_2018073180000.CSV**

EDI = Hardcoded

987654321 = Agency Tax ID

20180731 = Date in YYYYMMDD format

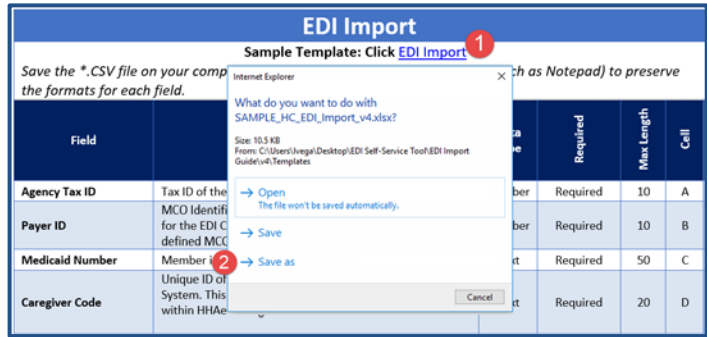
080000 = Time Stamp in HHMMSS format

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

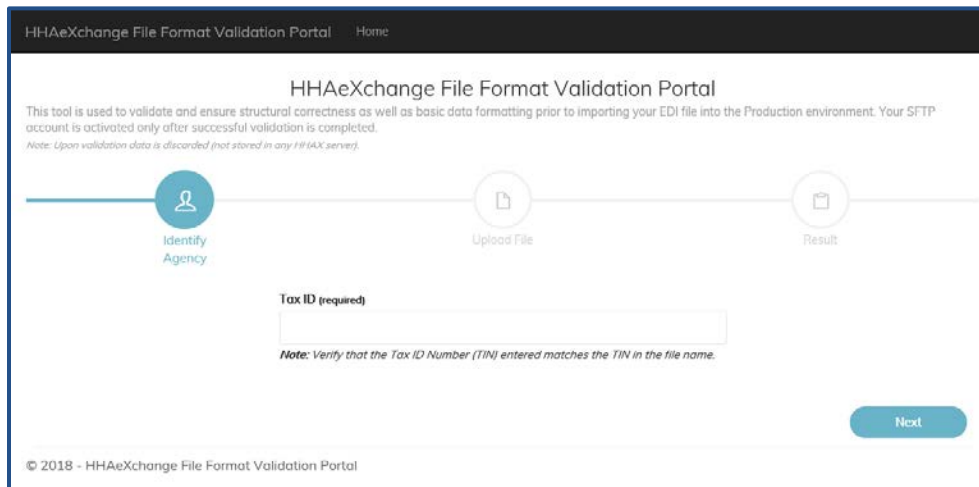
By default, these files open in Excel, which may alter the format of certain fields. To maintain the integrity of the sample templates and formats, HHAX strongly recommends that these templates be saved on a User's workstation first using the following steps:

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



Validating the File Format

Upon creating an import file, navigate to the [HHAX File Format Validation Portal](https://edi.hhaexchange.com/) (<https://edi.hhaexchange.com/>) to validate and ensure the structural correctness and formatting requirements. For instructions, refer to the [EDI File Format Validation Portal Job Aid](#).



EDI Import Interface - Required Fields and Formats

As with the Naming Convention, there are required fields per file document which must be in specific format. This EDI Import Interface supports the following import operations into HHAX; click corresponding link to access a sample file.

1. [Schedule Import](#)
2. [Confirmed Visits Import](#)
3. [Billed Visits Import](#)
4. [Missed Visits Import](#)
5. [Delete of Schedule](#)

Note: Schedule is only deleted if a Visit is not billed in HHAX via the overnight billing process.

Refer to the **Required Fields by Import File Type** section in the applicable (regional) *EDI Code Table Guide* for the set of required fields for each of the above-listed import file types.

EDI Import

Refer to the layout below when creating the EDI Import file. Please contact HHAX Technical Support to obtain a copy of the *EDI Code Table Guide*, specific your Payer(s). This guide contains valid values for certain EDI import fields as indicated below.

Optional: These fields may be used by the State when evaluating compliance with the 21st Century Cures Act (Cures Act) regulations. The Cures Act mandates that states require EVV use for Medicaid-funded Personal Care Services (PCS) and Home Health Care Services (HHCS) for in-home visits by a provider. For further information, please consult with your states' specific compliance requirements regarding the Cures Act.

EDI Import					
Sample Template: Click EDI 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. Refer to the Saving Sample Templates to a Workstation section.</i>					
Field	Description	Data Type	Required	Max Length	Cell
Agency Tax ID	Tax ID of the Agency	Number	Required	9	A
Payer ID	Unique MCO/Payer Identifier. Refer to the values defined in the EDI Code Table Guide.	Number	Required	10	B
Medicaid Number	Member identifier - Medicaid Number. Format should be alphanumeric with no special characters.	Text	Required	50	C
Caregiver Code	Unique ID of the Caregiver in Agency's Management System. This value is mapped to Alt Caregiver Code field within HHAExchange. The predefined value "TEMP" can be included to indicate that there is no Caregiver currently assigned to a schedule. This is allowed only if the visit is not yet verified.	Text	Required	20	D
Caregiver First Name	When Required: if visit is confirmed or billed. If the value is empty, then the existing value of Caregiver First Name is not removed if the Caregiver already exists in HHAExchange.	Text	Situational	50	E
Caregiver Last Name	When Required: if visit is confirmed or billed. If the value is empty, then the existing value of Caregiver Last Name is not removed if the Caregiver already exists in HHAExchange. If the value is not empty, Caregiver First Name is overwritten in HHAExchange.	Text	Situational	50	F
Caregiver Gender	Possible Values: M (Male) or F (Female) If the value is empty, then "M" is considered the Gender when creating a Caregiver. However, HHAExchange recommends sending data in this field.	Text	Optional	1	G

EDI Import

Sample Template: Click [EDI 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. Refer to the [Saving Sample Templates to a Workstation](#) section.

Field	Description	Data Type	Required	Max Length	Cell
	<p>If the value is empty, then the existing value of Gender is not removed if the Caregiver already exists in HHAExchange.</p> <p>If the value is not empty, Caregiver Gender is overwritten in HHAExchange.</p>				
Caregiver Date of Birth	<p>Format: YYYY-MM-DD</p> <p>If the value is empty, then '1901-01-01' is loaded into this field in Caregiver Profile when creating a Caregiver.</p> <p>If the value is empty, then the existing value of Date of Birth is not removed if the Caregiver already exists in HHAExchange.</p> <p>If the value is not empty, Caregiver Date of Birth is overwritten in HHAExchange.</p>	Date	Optional	10	H
Caregiver SSN	<p>Social Security Number</p> <ul style="list-style-type: none"> Format: XXX-XX-XXXX; OR <p>Format: 000-0X-XXXX if providing the last 5 digits of the Caregivers SSN.</p>	Text	Optional	11	I
Schedule ID	<p>Unique Schedule ID in Agency's Management System.</p> <p>The Schedule ID should be unique per Member, DOS, Procedure Code and Shift. If the visit crosses multiple calendar days, a unique Schedule ID per calendar day is required.</p>	Text	Required	20	J
Procedure Code	<p>Billing Service Code</p> <p>If the schedule already exists in HHAExchange, the Billing Service Code is overwritten (<i>if visit is not billed in HHAExchange</i>).</p> <p>Refer to the values defined in the EDI Code Table Guide.</p>	Text	Required	50	K
Schedule Start Time	<p>Schedule Start Time - YYYY-MM-DD HH:MM as per Agency's Timezone, in Military Time.</p> <p>If the schedule already exists in HHAExchange, the Schedule Start Time is overwritten (<i>if visit is not billed in HHAExchange</i>).</p>	Date /Time	Required	16	L
Schedule End Time	<p>Schedule End Time - YYYY-MM-DD HH:MM as per Agency's Timezone, in Military Time.</p> <p>If the schedule already exists in HHAExchange, the Schedule End Time is overwritten (<i>if visit is not billed in HHAExchange</i>).</p>	Date /Time	Required	16	M
Visit Start Time	<p>When Required: When "Visit End Time" OR "EVV End Time" is provided.</p>	Date /Time	Situational	16	N

EDI Import

Sample Template: Click [EDI 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. Refer to the [Saving Sample Templates to a Workstation](#) section.

Field	Description	Data Type	Required	Max Length	Cell
	<p>Visit Start Time - YYYY-MM-DD HH:MM as per Agency's Timezone, in Military Time.</p> <p>If a value is provided in this field, then the schedule is confirmed with the start time provided. This field should have a value if the "EVV Start Time" is not empty.</p> <p>If the value is empty, then the existing value of Visit Start Time in HHAExchange is removed.</p>				
Visit End Time	<p>When Required: When "EVV End Time" is provided.</p> <p>Visit End Time - YYYY-MM-DD HH:M as per Agency's Timezone, in Military Time.</p> <p>If a value is provided in this field, then the Schedule is confirmed with the End Time provided.</p> <p>If the value is empty, then the existing value of Visit End Time in HHAExchange is removed.</p>	Date /Time	Situational	16	O
EVV Start Time	<p>EVV Time if visit is confirmed via EVV.</p> <p>When Required: If visit is confirmed or billed via EVV.</p> <p>Format: YYYY-MM-DD HH:MM as per Agency's Timezone, in Military Time.</p> <p>If a value is provided in this field, then the Visit Start Time is marked as confirmed via EVV; otherwise, it is considered manually confirmed.</p> <p>If the value is empty, then the existing value of EVV Start Time in HHAExchange is removed.</p>	Date/ Time	Situational	16	P
EVV End Time	<p>EVV Time if visit is confirmed via EVV.</p> <p>When Required: If visit is confirmed or billed via EVV.</p> <p>Format: YYYY-MM-DD HH:MM as per Agency's Timezone, in Military Time.</p> <p>If value is provided in this field, then the Visit End Time is marked as confirmed via EVV; otherwise, it is considered manually confirmed.</p> <p>If the value is empty, then the existing value of EVV End Time in HHAExchange is removed.</p>	Date /Time	Situational	16	Q
Service Location	<p>When Required: If "Visit Start Time" and "Visit End Time" is provided. Not required when Visit is only scheduled. Service location should be formatted as specified, a pipe delimiter is required to separate each field like in the example shown below.</p>	Text	Situational	100	R

EDI Import

Sample Template: Click [EDI 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. Refer to the [Saving Sample Templates to a Workstation](#) section.

Field	Description	Data Type	Required	Max Length	Cell
	<p>Format: Address 1 Address 2 City State Zip, i.e., 1 Sample Street Houston TX 12345.</p> <p>Physical location where the service was rendered.</p> <ul style="list-style-type: none"> Zip Code (5 or 9-digit format i.e., 12345). Format: 99999 OR 999999999 State 2-character abbreviation 				
Duties	<p>Pipe () separated list of the duties; for example: 016 021 023 027 Duty codes can be prefixed by an asterisk (“*”) to indicate that the task was attempted but refused by the Member. e.g. 016 *021 023</p> <p>If a value is provided in this field, then the Visit is confirmed with duties. A value in this field is ignored if the “Visit End Time” is empty.</p> <p>If the value is empty, then the existing value of Duties in HHAExchange is removed.</p> <p>Refer to the values defined in the EDI Code Table Guide.</p>	Text	Optional	1000	S
Clock-In Phone Number	<p>Caller ID - If Visit start time is confirmed by IVR When required: if visit confirmed via telephony.</p> <p>If a value is provided in this field, then it is considered an IVR confirmation and this phone number is imported into HHAExchange.</p> <p>If the value is empty, then the existing value of Clock-In Phone Number in HHAExchange is removed.</p>	Number	Situational	10	T
Clock-In Latitude	<p>Latitude - If Visit start time is confirmed by GPS When required: if visit confirmed via mobile app.</p> <p>If a value is provided in this field, then it is considered a GPS confirmation and the Latitude is imported into HHAExchange.</p> <p>If the value is empty, then the existing value of Clock-In Latitude in HHAExchange is removed.</p>	Text	Situational	50	U
Clock-In Longitude	<p>Longitude - If Visit start time is confirmed by GPS. When required: if visit confirmed via mobile app.</p> <p>If a value is provided in this field, then it is considered a GPS confirmation and the Latitude is imported into HHAExchange.</p> <p>If the value is empty, then the existing value of Clock-In Longitude in HHAExchange is removed.</p>	Text	Situational	50	V
Clock-In EVV Other Info	<p>If Visit start time is confirmed by fixed ID device gathered at checkout.</p>	Text	Situational	25	W

EDI Import

Sample Template: Click [EDI 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. Refer to the [Saving Sample Templates to a Workstation](#) section.

Field	Description	Data Type	Required	Max Length	Cell
	<p>When required: if visit confirmed via fixed device.</p> <p>Possible Value: FOB.</p> <ul style="list-style-type: none"> If the value is empty, then the existing value of Clock-In EVV Other Info in HHAExchange is removed. 				
Clock-Out Phone Number	<p>Caller ID - If Visit end time is confirmed by IVR. When required: if visit confirmed via telephony.</p> <p>If a value is provided in this field, then it is considered an IVR confirmation and this phone number is imported into HHAExchange.</p> <p>If the value is empty, then the existing value of Clock-Out Phone Number in HHAExchange is removed.</p>	Number	Situational	10	X
Clock-Out Latitude	<p>Latitude - If Visit end time is confirmed by GPS. When required: if visit confirmed via mobile app.</p> <p>If a value is provided in this field, then it is considered a GPS confirmation and the Latitude is imported into HHAExchange.</p> <p>If the value is empty, then the existing value of Clock-Out Latitude in HHAExchange is removed.</p>	Text	Situational	50	Y
Clock-Out Longitude	<p>Longitude - If Visit end time is confirmed by GPS. When required: if visit confirmed via mobile app.</p> <p>If a value is provided in this field, then it is considered a GPS confirmation and the Latitude is imported into HHAExchange.</p> <p>If the value is empty, then the existing value of Clock-Out Longitude in HHAExchange is removed.</p>	Text	Situational	50	Z
Clock-Out EVV Other Info	<p>If Visit start time is confirmed by fixed ID device gathered at checkout. When required: if visit confirmed via fixed device.</p> <p>Possible Value: FOB.</p> <ul style="list-style-type: none"> If the value is empty, then the existing value of Clock-In EVV Other Info in HHAExchange is removed. 	Text	Situational	25	AA
Invoice Number	<p>Invoice number in Agency's Management System. When required: If visit is billed.</p> <p>If a value is provided in this field, it is considered a Billed Visit in the Agency Management System. This invoice number is imported into HHAExchange and the Visit is billed in HHAExchange via the overnight process.</p>	Text	Situational	18	AB

EDI Import

Sample Template: Click [EDI 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. Refer to the [Saving Sample Templates to a Workstation](#) section.

Field	Description	Data Type	Required	Max Length	Cell
	If the value is empty, then visit will not bill in HHAExchange.				
Visit Edit Reason Code	<p>When Required: If Visit is manually edited.</p> <ul style="list-style-type: none"> If the value is empty, then the existing Reason value in HHAX remains. Refer to the values defined in the EDI Code Table Guide. 	Number	Situational	3	AC
Visit Edit Action Taken	<p>When Required: If Visit is manually edited.</p> <ul style="list-style-type: none"> If the value is empty, then the existing Action Taken value in HHAX remains. Refer to the values defined in the EDI Code Table Guide 	Number	Situational	2	AD
Notes	<p>Free Text Notes - Data in this field is imported as Visit Notes.</p> <p>If the value is empty, then the existing value of Notes in HHAExchange is not removed.</p> <p>A Note may be required by the Payer when Missed Visit = "Y". Refer to the EDI Code Table Guide (Missed Visit Code Tables section) for further details.</p>	Text	Optional	500	AE
Is Deletion	<p>Possible Values: Y (Yes) or N (No) An empty value is considered as "N". Ignored if the Visit is confirmed and claim is billed.</p> <p>If the value is "Y", then the Visit is deleted from HHAExchange if not billed.</p>	Text	Optional	1	AF
Invoice Line Item ID	<p>Visit is identified based on Schedule ID and Medicaid Number.</p> <p>Unique identifier of the invoice line item in the 3rd party system.</p> <p>Note: This field should be left blank unless vendor is specifically requested by HHAExchange to provide this information.</p>	Text	Optional	30	AG
Missed Visit	<p>Possible Values: Y (Yes) or N (No) An empty value is considered as "N".</p> <p>If "Y", then the Visit is marked as a 'Missed' Visit.</p> <p>If "N", then the Missed Visit is removed from HHAX if Visit was previously marked as missed 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.</p>	Text	Situational	1	AH
Missed Visit Reason Code	<p>When Required: When Missed Visit = "Y"</p> <p>If the value is empty, then the existing value of Reason in HHAExchange is not removed.</p>	Number	Situational	3	AI

EDI Import

Sample Template: Click [EDI 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. Refer to the [Saving Sample Templates to a Workstation](#) section.

Field	Description	Data Type	Required	Max Length	Cell
	Refer to the values defined in the EDI Code Table Guide.				
Missed Visit Action Taken Code	<p>When Required: When Missed Visit = "Y"</p> <p>If the value is empty, then the existing value of Action Taken in HHAExchange is not removed.</p> <p>Refer to the values defined in the EDI Code Table Guide.</p>	Number	Situational	2	AJ
Timesheet Required	<p>Possible Values: Y (Yes) or N (No) An empty value is considered as "N".</p> <p>If the value is "Y", then the Duty Sheet is marked as Timesheet Required.</p> <p>If the value is empty, then the existing value of Timesheet Required in HHAExchange is removed.</p>	Text	Optional	1	AK
Timesheet Approved	<p>Possible Values: Y (Yes) or N (No) An empty value is considered as "N".</p> <ul style="list-style-type: none"> If the value is "Y", then the Duty Sheet is marked as Timesheet Approved. If the value is empty, then the existing value of Timesheet Approved in HHAExchange is removed. 	Text	Optional	1	AL
User Field 1	<p>Agency Office NPI</p> <p>The NPI should match the NPI assigned to the member office loaded in HHAExchange. If the incorrect NPI, this could result in an error.</p> <p>Note, this field is an optional field and can be left blank.</p>	Text	Optional	20	AM
User Field 2	<p>Employee Registry ID unique employee (Caregiver) registered ID with the State. When Required: if visit is confirmed or billed.</p> <p>Refer to the <i>EDI Code Table Guide</i> for your specific Payer(s).</p>	Text	Situational	9	AN
User Field 3	<p>Patient Diagnoses Code (DX Code) When required: If visit is confirmed or billed. Format: Pipe () separated list of the DX codes; for example: H00 B99 U99</p> <p>Refer to the <i>EDI Code Table Guide</i> for your specific Payer(s).</p>	Text	Situational	208	AO
User Field 4	<p>Clock-In Service Location Possible values: Home or Community</p>	Text	Situational	9	AP

EDI Import					
Sample Template: Click EDI 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. Refer to the Saving Sample Templates to a Workstation section.					
Field	Description	Data Type	Required	Max Length	Cell
	When required: when visit is confirmed or billed				
	Refer to the <i>EDI Code Table Guide</i> for your specific Payer(s).				
User Field 5	Clock-Out Service Location Possible values: Home or Community When required: when visit is confirmed or billed	Text	Situational	9	AQ
	Refer to the <i>EDI Code Table Guide</i> for your specific Payer(s).				

Notes:

- **Optional** fields are not required. **Situational** fields are dependent on other fields and may be required according to the information in another field. For example, if a **Missed Visit** is marked as **Y**, then the Situational fields **Missed Visit Reason Code** and **Missed Visit Action Taken Code** are required.
- The last row is considered the latest data and is reflected in HHAExchange as such. This means values received in the latest record overrides the data in HHAExchange.
- The **Schedule Start Time** and **Schedule End Time** is updated with **Visit Start Time** and **Visit End Time** values if those fields have data in the file.