

State of Florida Agency for Persons with Disabilities

WellSky for iConnect External Provider Interface V6.0

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Introduction

Introduction

FL Agency for the Persons with Disabilities (APD) has contracted with WellSky to allow providers to import select data into iConnect in lieu of keying the data directly into the application. This document provides workflow steps for sending activities data through an XML file for import directly into the iConnect system. This includes service logs, daily attendance logs, daily progress notes, trip logs, monthly/quarterly summaries, and annual reports.



APD iConnect External Provider Interface (EPI)



Chapter 1 | Setup

Chapter 1 | Setup

Data Elements, Mapping, and File Layout

Each Provider who will use the External Provider Interface will use the "Provider Activities Import Fields.xls" that outlines what data elements can be included in the XML file that will import into iConnect.

- The Provider may have to update their existing system to incorporate iConnect required fields.
- The Provider will be required to develop their XML file export process to match the system requirements for the EPI.
- The Provider will use this as a guide when coding their XML export file that will export data from their system into the correct XML file format and syntax which will be used to import data into iConnect.

You can use online xml syntax checkers to validate the XML file. https://onlinexmltools.com/validate-xml

Example 1: Sample XML File

1	<	<pre>1 <?xml version="1.0" encoding="UTF-8"?></pre>	
2	Ģ <	2 🛱 <activities *********************************<="" import="" submitterid="111" td=""><td></td></activities>	
3	¢.	3 d <consumers></consumers>	
4	¢	<pre>4 d <caseno "="" caseno="("><!--Required. Match Field--></caseno></pre>	
5		<pre>5 <firstname> </firstname></pre> /firstname> Required. Match Field	
6		6 " lastname="">"lastname>"la	
7	¢	7 e <activity></activity>	
8	¢.	3 dia cativitydatetime>	
9		<pre>startdate>2020/07/06<!-- Required--></pre>	
10		<pre><starttime>15:30:00</starttime><!-- Required--></pre>	
11		<pre>1 <enddate>2020/07/06</enddate><!-- Required--></pre>	
12		<pre>2 <endtime>16:30:00</endtime><!-- Required--></pre>	
13	-	3 -	
14		4 <authorization>233777</authorization> Required. Match Field	
15		5 <authserviceid>125397</authserviceid> Match Field (not required)	
16		<pre><workerid>2486</workerid><!--Required. Match Field--></pre>	
17		7 <location></location>	
18		<pre><pre>cprimarydiagnosis></pre></pre>	
19		<pre>9 <status>complete</status></pre>	
20		<program>====================================</program>	
21		1 vendorserviceid>166077 vendorserviceid> Required. Match Field	
22		<pre>2 <totalcost></totalcost></pre>	
23		<pre>3 <units>3</units></pre>	
24		4 <placeofservice></placeofservice>	
25		5 <	fficient.
26	白	6 中 <contacttype></contacttype>	
27		7	
28		<pre>8 - </pre>	
29	10	9 -	
30	-	<pre>/caseno></pre>	
31	-	1 -	
32	L<	2 L	

There are several data elements required in the XML file. Some are values supplied by the provider, and others are iConnect generated data elements. A report exists in



iConnect that provides the iConnect generated data elements. See the <u>Generating</u> <u>Reports to Configure External System</u> section of this manual for more information.

Each XML file must include the following:

iConnect Field Label	XML Tag	Required	Notes
Unique Record Identifier	<submitterid></submitterid>	Y	Contains the iConnect generated ID for the provider plus the first 5 letters of the Provider name.
Case No.	<caseno></caseno>	Y	iConnect generated ID number for the consumer
Consumer First Name	<firstname></firstname>	Y	Must match iConnect value
Consumer Last Name	<lastname></lastname>	Y	Must match iConnect value
Start Date	<startdate></startdate>	Y	Sample Date: 2020/12/25. Multiple values can be sent. i.e., Daily Attendance Logs. See Example 2 below.
Start Time	<starttime></starttime>	Y	Sample time: 15:30:00
End Date	<enddate></enddate>	Y	Sample Date: 2020/12/25. Multiple values can be sent. i.e., Daily Attendance Logs. See Example 2 below.
End Time	<endtime></endtime>	Y	Sample time: 15:30:00
Authorization ID	<authorization></authorization>	Y	iConnect generated ID number for the authorization
Authorization Service ID	<authserviceid></authserviceid>	Y	iConnect generated ID number for the authorized service
MemberID	<workerid></workerid>	Y	iConnect generated ID number for the worker on the submitting Provider's record.
Location	<location></location>	Y	Do not send a value, but the following placeholder must exist in the file: <location></location>
Primary Diagnosis	<primarydiagnosis></primarydiagnosis>	Y	Do not send a value, but the following placeholder must exist in the file:



		1	
			<primarydiagnosis></primarydiagnosis>
			osis>
Status	<status></status>	Y	Must equal Complete
Program	<program></program>		iConnect generated ID number for
			the provider.
		Y	An open iConnect Provider
			Selection record must exist for this
			provider on the consumer's record.
VServiceID	<vendorserviceid></vendorserviceid>		iConnect generated ID number for
		Y	the authorized service for the
			provider.
Total Cost	<totalcost></totalcost>		Do not send a value, but the
		v	following placeholder must exist in
			the file:
			<totalcost></totalcost>
Units	<units></units>		Send the total number of units for
			the activity.
		V	iConnect application has logic to
			validate the number of units based
			on the start and end times for time-
			based services.
Place of Service	<placeofservice></placeofservice>		Do not send a value, but the
		Y	following placeholder must exist in
		1	the file:
			<pre><placeofservice></placeofservice></pre>
Note	<groupnote></groupnote>	Y	50,000-character limit.
Provider	<contacttype></contacttype>	V V	Multiple values can be sent.
Documentation			See Example 3 below.



Example 2: XML file with multiple start/end dates and times.

1	xml v</th <th>ersion="1.0" encoding="UTF-8"?></th>	ersion="1.0" encoding="UTF-8"?>
2	⊟ <activit< td=""><td>:iesimport submitterID="</td></activit<>	:iesimport submitterID="
3	e <con< td=""><td>sumers></td></con<>	sumers>
4	ė <	caseno caseno="[]]"> Required. Match Field
5		<pre><firstname> = </firstname><!--Required. Match Field--></pre>
6		<lastname>= s</lastname> Required. Match Field
7	白	<activity></activity>
8	di la	<activitydatetime></activitydatetime>
9		<pre><startdate>2020/07/06</startdate><!-- Required--></pre>
.0		<pre><starttime>15:30:00</starttime><!-- Required--></pre>
.1		<pre><enddate>2020/07/06</enddate><!-- Required--></pre>
.2		<pre><endtime>16:30:00</endtime><!-- Required--></pre>
3	-	
.4	ė.	<activitydatetime></activitydatetime>
.5		<pre><startdate>2020/07/07</startdate><!-- Required--></pre>
.6		<pre><starttime>14:30:00</starttime><!-- Required--></pre>
.7		<pre><enddate>2020/07/07</enddate><!-- Required--></pre>
.8		<pre><endtime>15:30:00</endtime><!-- Required--></pre>
.9	-	
20		<authorization>233777</authorization> Required. Match Field
21		<authserviceid>125397</authserviceid> Match Field (not required)
2		<pre><workerid>2486</workerid><!--Required. Match Field--></pre>
:3		<location></location>
14		<pre><primarydiagnosis></primarydiagnosis></pre>
25		<status>Complete</status>
:6		<program></program> !Required. Match Field>
.7		<pre><vendorserviceid>166077</vendorserviceid><!--Required. Match Field--></pre>
8		<totalcost></totalcost>
29		<units>3</units>
0		<pre><placeofservice></placeofservice></pre>
11		<pre><groupnote>Creating a single record through file transfer is feasible, but not efficient.</groupnote></pre>
12	自	<contacttype></contacttype>
13		<value>Progress Note</value>
14	-	
15	-	
6	- <,	/caseno>
17	- <td>isumers></td>	isumers>
8	<td>tiesimport></td>	tiesimport>



Example 3: XML file with multiple Provider Documentation types.

1	<	?xml version="1.0" encoding="UTF-8"?>
2	P <	activitiesimport submitterID="""
3	¢.	<consumers></consumers>
4	¢	<caseno "="" =="" caseno="1"><!--Required. Match Field--></caseno>
5		<firstname>=/firstname><!--Required. Match Field--></firstname>
6		<lastname>=====</lastname> Required. Match Field
7	¢	<activity></activity>
8	白	<activitydatetime></activitydatetime>
9		<startdate>2020/07/04</startdate> Required
0		<starttime>15:30:00</starttime> Required
.1		<enddate>2020/07/04</enddate> Required
2		<pre><endtime>16:30:00</endtime><!-- Required--></pre>
3	÷	
.4		<authorization>233777</authorization> Required. Match Field
.5		<authserviceid>125397</authserviceid> Match Field (not required)
6		<workerid>2486</workerid> Required. Match Field
.7		<location></location>
.8		<primarydiagnosis></primarydiagnosis>
.9		<status>Complete</status>
20		<program>III71</program> Required. Match Field
21		<pre><vendorserviceid>166077</vendorserviceid><!--Required. Match Field--></pre>
22		<totalcost></totalcost>
23		<units>3</units>
24		<pre><placeofservice></placeofservice></pre>
25		<pre><groupnote>Creating a single record through file transfer is feasible, but not efficient.</groupnote></pre>
26	申	<contacttype></contacttype>
27		<value>Progress Note</value>
28		<value>Quarterly Summary</value>
29	-	
30	E.	
31	-	
32	-	
33	1<	/activitiesimport>



Example 4: XML File With Multiple Consumers.

```
<?xml version="1.0" encoding="UTF-8"?>
<consumers>
      <caseno caseno="12345"><!--Required. Match Field. -->
        <firstname>Tony</firstname><!--Required. Match Field. -->
         <lastname>Doe</lastname><!--Required. Match Field. -->
        <activity>
           <activitydatetime>
             <startdate>2020/07/10</startdate><!-- Required. -->
             <starttime>15:30:00</starttime><!-- Required. -->
             <enddate>2020/07/10</enddate><!-- Required. -->
             <endtime>16:30:00</endtime><!-- Required. -->
           </activitydatetime>
            <authorization>233777</authorization><!--Required. Match Field. -->
           <authserviceid>125397</authserviceid><!--Match Field (not required)-->
           <workerid>2486</workerid><!--Required. Match Field. -->
           <location></location>
           <primarydiagnosis></primarydiagnosis>
           <status>Complete</status>
           <program> //program><!--Required. Match Field. -->
           <vendorserviceid>166077</vendorserviceid><!--Required. Match Field. -->
           <totalcost></totalcost>
           <units>4</units>
           <placeofservice></placeofservice>
           <groupnote>Creating a single record through file transfer is feasible, but
           not efficient.</groupnote>
           <contacttype>
               <value>Progress Note</value>
           </contacttype>
        </activity>
     </caseno>
      <caseno caseno="54321"><!--Required. Match Field. -->
        <firstname>Luz</firstname><!--Required. Match Field. -->
        <lastname>Doe</lastname><!--Required. Match Field. -->
        <activity>
           <activitydatetime>
             <startdate>2020/07/06</startdate><!-- Required. -->
             <starttime>15:30:00</starttime><!-- Required, -->
             <enddate>2020/07/06</enddate><!-- Required. -->
             <endtime>16:30:00</endtime><!-- Required. -->
           </activitvdatetime>
           <authorization>230525</authorization><!--Required. Match Field. -->
           <authserviceid>91338</authserviceid><!--Match Field (not required)-->
           <workerid>2486</workerid><!--Required. Match Field. -->
           <location></location>
           <primarydiagnosis></primarydiagnosis>
           <status>Complete</status>
           <program> // /program><!--Required. Match Field. -->
           <vendorserviceid>445288</vendorserviceid><!--Required. Match Field. -->
           <totalcost></totalcost>
           <units>4</units>
           <placeofservice></placeofservice>
           <groupnote>Creating a single record through file transfer is feasible, but
           not efficient.</groupnote>
           <contacttype>
               <value>Progress Note</value>
           </contacttype>
        </activity>
     </caseno>
  </consumers>
</activitiesimport>
```



The XML File name must follow the required naming convention:

ProviderID_First5LettersofProviderLastName_mmddyyyy_hhmmAM_ActivitiesImport.x ml

Example: 12345_EXAMP_09022019_1020AM_ActivitiesImport.xml

Generating Reports to Configure External System

FL APD service providers who intend to use the External Provider Interface functionality must submit a valid XML file of service activity data. There are several iConnect generated data elements required in the XML File. The service providers or designated worker will run the report from iConnect that will supply the required data for each provider.

- 1. Navigate to the Provider record and select the Providers tab.
- 2. From the Report menu, select the appropriate report.
 - a. Provider EPI report will show information related to active authorizations. An open iConnect Provider Selection record must exist for this provider on the consumer's record.

op	0 i 🖸	onnect											Last Up	odati
File	Edit	Reports												
		Provider EPI		_	Quick S	earch								
			Open Provider EP	1				Provider	rs		~	Provider Nan	10	
									M	DASHBOA	RD CO	NSUMERS	PROVIDERS	
							Y		Y Y		Ŷ			
					Workers	Services	Provider ID N	lumbers	Beds	Linked Pro	viders S	ervice Area		
					Providers	CAP	EVV Activities	EVV S	cheduling	Forms	Contracts	Enrollment	Authorizations	N

- 3. To generate the authorization report, click on Provider EPI report. The report parameters window opens.
 - a. Select the Authorization Start Date and Authorization End Date from the calendar. This is usually the first and last day of the fiscal year
 - b. Typically, providers will only be interested in approved authorizations.



Chapter 1 | Setup

.

	(Select All)			
End Date:	Approved			
	Partially Approved			
	Rejected			
	Requested			
	Restored			
	Resubmitted			
	O VOID	· · · ·		
		lh.		
The	- Investor	1		
vice Status Approved, Par	ially Approved, Restor	ate: 07/01/2023		Vi
rvice Status Approved, Par	ally Approved, Restor	ate: 07/01/2023		Vi

- c. Select View Report. The results are displayed.
 - i. The report has two sections. The top section will list all workers from the Provider's Workers tab and their Worker ID, which is the data needed for the Member ID field on the XML file.
 - ii. The bottom section is the authorization report.

Service Status	pproved, Partially Appro	ved, Restoi	NOLL 🗆	tart Date: 7/1/2023 12:00:	00 AM O NU	nt 🖸				View Report
14 4 1 0	127 🌶 🄰 💠	-	Find Next	R • ③						
EPI Repo	ort									
Report Run Time 1	12/5/2023 1:26:58 PM									
Provider ID	Provider Name			Worker		Worker ID				
1221	ACCAMED AND INC	MILE HIPPORT	1000	Aposte Viernie		2450				
10.271	ACCARD AND INC	ARLE SUPPORT	MAC.	ASSUST ENALGABLE INA		147.75				
10.271	ADJANEZ VHIS INJ	ABLE SUPPORT	inc.	APOTO VINTERS		THE				
10.171	ADJANEZ HAD BUT	ARE FORTORS	NO.	Annual Distance		1913				
10.221	ACCAMEDIANCE INCO	ARE DEPOSIT	100	Advance of the lot		TH-SH				
10.271	ACCANES HOLD INC	ARELY ADDRESSES	Sec.	AMAGION TWELLING		8071				
Auth Service ID	Vendor Service ID	Authorization	iConnect ID	Consumer First Name	Consumer Last Name	Provider ID Medicaid ID	Service Status	Service Code	Service Description	Start Date
674053	1038028	666660	1290	, Auffinit	RADIO	400222396	Approved	T2021:UC:HI	(4083) Life Skills Development - Level 2 (Supported Employment - Individual)	7/1/2023
674054	1039315	666660	1000	Jainei	Ramine.	400243.8m	Approved	\$5130:UC	(4140) Personal Supports	7/1/2023
674756	1039315	669705	171/16	Childhie	fiampos	400222396	Approved	S5130:UC	(4140) Personal Supports	7/1/2023
674982	1039315	669723	0.00	Bataut	lines.	00258.00	Approved	\$5130:UC	(4140) Personal Supports	7/1/2023
678103	1039315	672418	10927	3009	Bashipan;	400232.0W	Approved	\$5130:UL	(4140) Personal Supports	7/1/2023
678104	1044464	672418	0.0004	Ame	Buildings.	100.00.00000	Approved	S5135 UC	(4080) Life Skills Development - Level 1 (Community	v 7/1/2023

d. Save this report in your preferred format, likely .csv or Excel.



Service Status End Date:	es Status Approved, Fartially Approved, Restor N Start Date: 7/1/2023 12:00:00 AM NULL View Report									
14 4 5	of 6 7 🕨 🔰 🗄 🗄		Find Next							
19276	NUMBER AND ISS	HER MANYON	(MC	XML file with report data		23799				
F SCOL	REPARED AND INC	HER MANYON	1643	CSV (comma delimited)		7/78				
100%	NUMBER AND ISS	HER HATTER	(MC	PDF		14803				
10076	NUMBER AND IS.	HELE BARFING	140	Excel		7720				
100%	RUNNER AND INC	HER HERE	DO:	Word		8796				
100%	NUMBER AND INCOME.	STATES IN FRANCE	140	MHTML (web archive)		8/79				
10076	NUMBER AND INCOME.	HERE'S BURNING	140	Witers-Condanse	-	8200				
100%	KOMEZ-ME KO	HELE HAPPENE	140	Dayini Yerciti		7980				
Auth Service ID	Vendor Service ID	Authorization	iConnect ID	Consumer First Name	Consumer Last Name	Provider ID Medicaid ID	Service Status	Service Code	Service Description	Start Date
674053	1038028	666660	15080	Junet	Matte	0000000000	Approved	T2021:UC:HI	(4083) Life Skills Development - Level 2 (Supported	7/1/2023

e. Select Save As, name the report file, and designate the location on your device where the report will be saved.

🛃 Save As	adventer adventer				x
🖉 🗢 🗖 Desktop 🕨				arch Desktop	٩
Organize 🔻 New fol	der			!≡ ▼	0
Organize New fold ★ Favorites Desktop ▶ Downloads OneDrive ▶ Downloads OneDrive ▶ Recent Places E ▶ Libraries Documents ▶ Music Pictures ■ Videos E ▶ Computer Local Disk (C:) File name: Tide name: ■ Save as type: Micro	der Name Documents Network Computer Jennifer Buck Libraries	Size	Item type File folder	IIII ▼ Date modified 2/18/2020 5:21 PM	
Hide Folders				Save Cancel	
Do you want to open or sa	/e rp_custom_external_provider_activity_import.xls from fwt	est.harmonyis.net?	Open	Save Cancel	×

f. Select Open to view the report results in the selected format.

	A	В	C D	E	F	G	н
1	EPI Rep	ort					
2	Report Run Time	10/20/2023 8:58:28 AM					
4		-					
5	Provider ID	Provider Name		Worker		Worker ID	
	11071		DODT INC			7004	



Updates to Provider's Non-iConnect System

Given that provider non-iConnect systems are broad and varied, this section will give general guidance for updates that will be required, to make use of the iConnect External Provider Interface.

Please note, APD cannot advise a provider regarding modifications to their system. APD can only provide the information required to utilize the External Provider Interface. Each provider will need to work with their IT Department or vendor to make any necessary modifications to their system.

Providers with questions about XML files and/or XML file mapping are encouraged to research resources on the internet and YouTube.

In the previous section, instructions regarding how to get the requisite data out of iConnect was provided. Using that information, providers will want to ensure that their system is able to generate an XML file with this information. Failure to include required data elements, will result in aborted or failed imports into iConnect.

The best practices for modification of non-iConnect systems includes the following steps.

- 1. Review existing system and determine if all required fields already exist.
 - a. Determine if existing fields should be relabeled to conform to the XML file requirements.
 - b. Determine which fields need to be added to the non-iConnect system.
- 2. Make modifications to non-iConnect database structure.
 - a. Map non-iConnect data fields to XML fields.
- 3. Create the export functionality to generate the XML file.
 - a. Include a means by which to identify only new records to avoid exporting duplicate records, which will cause an import failure.

Example of a provider system that would need to be modified:

Scenario: ABC Provider has a documentation system that is external to iConnect. Their system includes the following data fields:

Customer ID (this is an this provider and their internal number specific to system)



- Client Name
- Address
- City
- State
- Zip
- Authorization PA Number
- Procedure Code
- Authorization Start Date

- Authorization End Date
- Rate
- Service Date
- Start Time
- End Time
- Service Log (text field to add all handbook required service log information)

Provider's Non-APD iConnect Data Elements		EPI Data Elements	
Customer ID		Unique Record Identifier	
Client Name		Case No.	
Address		Consumer First Name	
City		Consumer Last Name	Highlighted EPI Data
State		Activity Start Date	the provider's pop-APD
Zip		ActivityTime_Start Time	iConnect system.
Authorization PA Number		Activity End Date	í í
Procedure Code		ActivityTime_End Time	They will have to be
Authorization Start Date		Authorization ID	added and then
Authorization End Date		Auth Service ID	mapped to the EPI Data
Rate		MemberID	Liements
Service Date		Location	
Start Time		Primary Diagnosis	
End Time		Status	
Service Log		Program	
-		VServiceID	
Example of a non-APD		Total Cost	
iConnect system that does n	ot	Units	
match the XML file		Place of Service	
requirements.		Note	
This system only has 4 of the		Provider Documentation	
required fields.			

ABC Provider uses the XML Schema Definition for the EPI and discovers their

system does not have all the necessary fields to be able to use the EPI.

ABC Provider will have to modify their system to add the additional data elements (fields).



Example of a provider system that would not need to be modified:

Scenario: XYZ Provider has a documentation system that is external to iConnect. Their system includes the following data fields:

- Provider ID (matches the iConnect Provider ID)
- Submitter ID (matches the Sender ID in the iConnect Provider Record)
- Customer ID (this is the consumer's iConnect ID displayed on the authorization)
- Client First Name
- Client Last Name
- Authorization #

- Authorized Service #
- Service ID
- Staff ID (matches the employee's Member ID in iConnect)
- Start Date
- Start Time
- End Date
- End Time
- Documentation
- Handbook Req

Provider's Non-APD iConnect Data Elements	EPI Data Elements	
Provider ID	Unique Record Identifier	
Submitter ID	Case No.	Example of a non-APD
Customer ID	Consumer First Name	iConnect system that matches
Client First Name	Consumer Last Name	the XML file requirements.
Client Last Name	Activity Start Date	The second second data to be set to be a second sec
Authorization #	ActivityTime_Start Time	he modified
Authorized Service #	Activity End Date	be modified.
Service ID	ActivityTime_End Time	The XML file requirements do
Staff ID	Authorization ID	have additional fields that can
Start Date	Auth Service ID	be transmitted, but they are
Start Time	MemberID	not required.
End Date	Location	
End Time	Primary Diagnosis	
Documentation	Status	
Handbook Req	Program	
	VServiceID	
	Total Cost	
	Units	
	Place of Service	
	Note	
	Provider Documentation	

XYZ Provider will not have to modify their system because there is one to one correspondence between their system and the required fields in the XML file



format. When they complete their XML mapping, they will validate to confirm their file is exportable.

									× ·					<u> </u>
XYZ Provider	Electronic Re	cord System												
Provider ID	Submitter ID	Customer ID	Client First Name	Client Last Name	Authorizatio n #	Authorized Service #	Service ID	Staff ID	Start Date	Start Time	End Date	End Time	Documentation	Handbook Req.
12345	12345_XYZ P	66235	John	Doe	657842	159753	78350	6245	09/02/23	6:00 AM	09/02/23	12:00 PM	Example Service Log Info	Service Log
12346	12345_XYZ P	45892	Suzy	Sample	458326	635741	78350	6245	08/03/23	7:00 AM	08/03/23	1:00 PM	Example Service Log Info	Service Log
12347	12345_XYZ P	12086	Kelly	Green	965412	995522	78350	6245	08/04/23	8:00 AM	08/04/23	2:00 PM	Example Service Log Info	Service Log
								Mi	crosoft Excel		×			
											-			
									activitiesi	import Map is e	xportable.		L,	
-											· ·			
-										OK				
										OK				



Explanation of the Importance of the XML Mapping

When providers submit their data via the EPI, the iConnect interface utility will receive the data and parse it out to the correct consumer record(s). If the data submitted by the provider does not match the XML requirements, iConnect cannot interpret the data.

The XML file:



The <u>Viewing the Activity (Consumer's Provider Documentation) Record</u> section will show how the data in the XML file populates in the consumer record.



Application Configuration

The tasks described below are completed as a one-time setup. They are completed by the Service Provider.

My Dashboard > My Files > Upload

 This access is defined at the provider > worker level. Once given access, the worker will be able to manually Upload and/or Download files for the associated Provider via My Dashboard > My Files > Upload. This step will make the link visible to the user on My Dashboard to upload the Provider's Activity XML file.

Quick Search									
1		Consumers		v (ast Name		GO	ADVANCED SEAR	<u>RCH</u>
		ONSUMERS	PROVIDERS	INCIDENTS	CLAIMS	SCHEDULER	UTILITIES	REPORTS	
CONSUM	ERS		INCIDENTS			PROVIDERS		TASKS	
ivision	۲	My Inciden	nt Ticklers	۲	Referrals		My	Management	0
		18			-				
					F		11		
		1			1		11		
		11			1		11		
							11	Pending Approval Queue	
							11	Pending Approval Queue My Files	
							11	Pending Approval Queue My Files AAA1B NAPIS Export	
		1			F		11	Pending Approval Queue My Files AAA1B NAPIS Export Download	
		1			P.		11	Pending Approval Queue My Files AAA1B NAPIS Export Download HaPI Upload	
		1			P.		11	Pending Approval Queue My Files AAA1B NAPIS Export Download HaPI Upload Import	
		1			F		11	Pending Approval Queue My Files AAA18 NAPIS Export Download HaPI Upload Import My Harmony NAPIS Export	

2. For each applicable worker, navigate to the Providers chapter. Search for and select the worker's Provider record. Select the Worker tab. Search for and select the applicable worker. Select the worker record to open. Select the Providers subpage. Select the applicable Provider record > the Worker Provider details page displays. Check the Upload HIPAA Files and Download HIPAA Files checkboxes. From the File menu, select Save and Close. This worker can now upload and download files for this provider in iConnect.



File	🛛 🧔 FL APD Sandbox - Internet Explor	er				- 0 >	×	
	🙆 https://fwtest.harmonyis.net/FLAP	DSandbox/Pages/Harmony.	aspx?ChapterID=241&/	ViewType=SubPageView&PageID	=35499&ChapterEntityID	=10002&EntityID=		-1.
Vorkers Senti Providers Divisi					A TEST Provider 8/7/2019 1:28 PM	Providers	^	
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Provider Worker Active 🗸 Equal To	N	~	C FL APD Sandbox -	Internet Explorer		-		×
Worker Name +	Worker	Search Reset	🍯 https://fwtest.harm	nonyis.net/FLAPDSandbox/Pages	s/Harmony.aspx?ChapterI	D=241&ViewType	=SubPage	View&F
	Providers	9 Providers record(s) n	ordin	nnect	A TEST Provide	er Wor	ker Pro	ovide
	Supervisors		ope not	Anneet	at 4/13/2018 12:3	8:34 PM		
	Background Check/Experience		File					
Worker Name 🔺	Credentiale	APD Test Provider		line of the				
Application, Harmony	Gredentials	Mary's Exceptional H	Worker Provider	Worker Provider				
Buck, Jennifer	Positions	ResCare For You		Provider Name *	APD Test	Provider		
Coleman, Steve	Languages	APD Walver		Active				
Cruz Myriame		A TEST Provider		Upload HIPAA Files				
Eulcher Lorena	-	WSC Agency1		Download HIPAA Files				
Gephart, Lori		WSC Agency2		Primary Provider				



Chapter 2 | Manual Upload

The provider will be provisioned through FL APD's ID PASS system. The provider or designated worker will log into iConnect and upload the Activities Import XML file from My Dashboard.

Upload the XML File

1. Log into iConnect using the ID PASS credentials provided by APD IT.

	Sign In
Direct	User Name

2. Using Role = Service Provider or Service Provider Worker, navigate to **My Dashboard** > **Tasks** > **My Files** > **Upload**.

opd iConnect							Welcor 8/16/201	me, Jennife 19 3:42 PM	r Buck My Dashboard	Sign Out	Role Service Provider Worker	P	v 60
File													
		Quick Search	h										
			Consumers	[v L	ast Name	G0 🕥	ADVAN	CED SEARCH				
		Participat	ing										
			MY DASHBOARD	CONSUMERS	INCI	DENTS CLAIMS	SCHEDULER						
	CONSUMERS		INCIDEN	πs		PRO	VIDERS		T/	ASKS			
	Division	\odot	Disposition		\odot	Notes		\odot	Links		\odot		
	Provider Selections	\odot	Screening Priority		\odot	Ticklers		\odot	My Management		\odot		
	Notes	\odot	Status		\odot	Provider Selections		\odot	My Claims		\odot		
	Ticklers	\odot	My Incident Queue		\odot				My Files		۲		
	Plans	0	My Incident Ticklers		0				Download				
									Import				
	Appointments		Inquiry Alert Notes List						Upload				
	Authorizations	\odot											
	Alert Notes	\odot											

3. The File Upload window displays. Update the following fields:

- a. Provider = Select the provider that is uploading the XML file. Only the providers the worker is associated to will display.
- b. File type = Activities Import
- c. File = browse to the location of the XML file on your computer and select to upload.
- d. Click Upload.

ttps://ltssb	h1. medi	ware.com/FLA	APDInterfaceT	Test/Dialogs/Fil	eUpload.aspx	
Provider:	12345-E	xample Provider	~			
FileType:	Activities	Import 🗸				
FileType: File: C:\L	Activities Isers\jenr	Import	cop\ 10002_ent e	er_0823 Brows	se Upload	
FileType: File: C:\L	Activities Isers\jenr ctory:	Import	lop\ 1000 _imi e	er_0823 Brows	Se Upload	
FileType: File: C:\L Upload Dire Uploaded:	Activities Isers\jenr	Import	lop\ 1000	er_0823 Brows	Upload	

4. Receive import success notification. Select OK.

ttps://itssbhi	mediwa	re.com/FLAPDInterface	Test/Dialogs/FileU	oload.aspx	
Provider:	:12345-	Example Provider]		
FileType:	Activities	Import 🗸			
File: C:\L	Jsers\jen	nifer.buck\Desktop\	B	rowse Upload	
Upload Dire	ectory:	16941_PURIF\IN			
Uploaded:		File Name		Size	Time
-			Ready		
	lessage f	rom webpage			
	<u> </u>	The file is successfully	imported		
		_			
			ОК		
	_				
C					



Viewing the Activity (Consumer's Provider Documentation) Record

- 1. Navigate to the Consumer's record that was in the XML file.
- 2. Select the **Provider Documentation** tab. From the list view, select the Activity (Provider Documentation) record.

Diag	iosis M	edications	Auths	Provid	ler Documer	tation Contac	ts				
Dem	ographics	SAN	Notes	Forms	Appointmen	its					
Filters vate	Greate	er Than 🗸									
3 Provider Do	cumentati	on record(s) returne	ed - now y	Search viewing 1 thr	n Reset					
3 Provider Do	cumentati	on record(Date +	s) returne	ed - now v Worke	Search viewing 1 thr er	rough 3	Provider	Service Code	Units	Status	
3 Provider Do Activity II 186	cumentation	on record(Date -	s) returne Buck	ed - now v Worke c, Jennifer	Search viewing 1 thr er	n Reset	Provider	Service Code	Units 1.00	Status Pending	,
3 Provider Do Activity II 186 192	cumentation 0 10/0 07/0	on record(Date - 11/2019 12/2019	s) returne Buck Buck	Worke Worke , Jennifer , Jennifer	Searce viewing 1 thr er E	th Reset rough 3 xample Provid	Provider	Service Code 0000 \$5130:UC	Units 1.00 3.00	Status Pending Complete	

3. The Details page displays and is read only because Status = Complete.

opd iConne	ect								Last Updated by (buck@apdcares.org at 10/24/2019 10:54:22 AM	Provider Documentation
File										
Provider Documentation	Activity Times									
	Start Date *	Start Time		End Date *		End Time		Total Min	utes	
	7/1/2019	03 V 30 V PI	M V	7/1/2019	(19) (19)	04 ~ 30 ~	PM V	60		Delete
	07/01/2019	>	~	07/31/2019		~ ~	~			Add
	Authorization									
	Auth ID *	141012				PA Number				
	Activity Details									
	Division	APD				Worker*	B	luck, Jennifer	Details	
	Provider	Summittee.	instantistic (In	Details		Status	C	omplete		
	Activity Services									
	Service *	\$5130.UC	(4140) Personal Sup	ports		Total Cost	\$	10.86		
	Units *	3.00								
	Rate	\$3.62								
	Secondary Code	\$5130.UC								
	Unit Type	15 mins								
	Documentation									
	Provider Documentation Type *	Annual Report Daily Attendance L Monthly R&B Quarterly Summary Service Log Trip Log	og Progr	ess Note	Note *		Creating a single needs to be tran information nee effective solution	e record through fi smitted, the file tra d to be transmitted n.	le transfer is feasible, but not efficie insfer option becomes more efficie electronic file transfer becomes the	ent. As more information. t. When large volumes be most efficient and co-

4. Below is a comparison of the data in the XML file and the data in the Activity (Provider Documentation) record in the application.





Chapter 3 | Secure File Transfer Protocol (SFTP)

Some providers may choose to not login to iConnect and manually upload their XML file. Providers do have the option to transmit their XML files via Secure File Transfer Protocol (SFTP). This process can be as simple as manually logging in to their File Transfer Protocol solution and connecting to the iConnect SFTP site. Providers can also choose to automate the process by developing their own program to transmit from their system to the iConnect SFTP site.

Please note, APD cannot advise a provider regarding how to setup their SFTP access. APD can only work with the provider regarding EPI Certificate Management.

EPI Certificate Management

The transmission of personal health information (PHI) outside of iConnect requires additional layers of security, especially since access is outside of the APD Single Sign-On (SSO) multifactor authentication process. This section will provide the steps necessary for providers to receive their EPI Certificate.

- 1. Providers interested in utilizing the iConnect EPI SFTP site will need two things to start the process.
 - i. An email address that can receive encrypted emails.
 - ii. Their IPv4 Internet Protocol (IP) address. This information can be found by accessing <u>What Is My IP Address - See Your Public Address</u> <u>- IPv4 & IPv6</u>
- 2. When the provider is ready to contact APD to receive their EPI SFTP Certificate, they should send an email to <u>iConnectepi@apdcares.org</u> to request their EPI SFTP Certificate.
- 3. An APD IT representative will contact the sender and schedule a video conference via Teams for the purpose of identity verification and provide an opportunity for the provider to ask any questions.
 - i. The provider will need to be on camera and have their photo ID available.
- 4. Once this process is completed, APD IT will send the iConnect EPI Certificate to the provider via an encrypted email.
- 5. The provider will test their access to the iConnect SFTP site and respond to the encrypted email with confirmation of successful connection.

Submitting Files & Retrieving Log Files

Once a provider determines how they will access the iConnect EPI SFTP site, they will place all files in the "In" folder. The example below uses FileZilla and is intended to be only an example. Each provider's solution may appear different.

1. Place the file in the "in" folder.



2. Verify the successful transmission.

Status: Status: Status: Status: Status: Status: Status: Status: Status: Status: Status: Status: Status: Status:	Using username "22365_ITEST '. Connected to 30.000_000 Starting upload of t' Retrieving directory listing of //in- Listing directory /in Retrieving directory /in Retrieving directory listing of '/- Listing directory /isting of '/in- Listing directory /isting of '/in- Listing directory /isting of '/in- Listing directory /isting of '/in-	1 second -	nem Lintenta actificación del TV Country Hannel, ISC 1 (1973) Indicates successful transfer	18947	1, (2000), (000) (0	10,000M	Additionary and		
Local site:	C:\Users\shelia.mott\OneDrive - Florida APD\1 - i	Connect\Interfaces\Pr	ovider\sFTP\Quality Home\20231012\	~	Remote site: /	in			
Filename		Filesize Filetype 4,045 XML File	Last modified 10/16/2023	^	Filename		Click on the "in" folder to see the file that has been transmitted. Filesize Filetype Last modifi	ed Permis	Owner
				1	12345_ITEST	_08022023_0	0130PM_ActivitiesImport.aml 4,045 XML File 10/17/2023	3 10:27:19 AMrwar	

3. Retrieve the Log File

Log files will be available for viewing within an hour of submission and will be available in the "out" folder.

Status: Retrieving directory listing of '/out' Status: Listing directory /out Status: Developy listing of '/out' successful	
Local site: C\Users\shelia.mott\OneDrive - Florida APD\1 - iConnect\Interfaces\Provider\sFTP\Quality Home\20231012\	Remote site: /out
Filename Filesize Filetype Last modified	Click on the "out" folder to see available log file.
	Filesze Filesze Filesze Filesze - Filesze Filesze - Filesze Filesze - Filesz
	2345_TTEST_08022023_0130PM_ActivitiesImport.xml 1,020 Text D., 10/10/2023 5:51:24 PM -rwx



Status: Using username "12245_JTEST", Shows the download was status: Shows the download was successful Status: Connected to 18_253_110_161 successful Status: The transfer successful transferred 10.20 bytes in 1 second successful	
Local site: C:\Users\shelia.mott\OneDrive - Florida APD\1 - iConnect\Interfaces\Provider\sFTP\Quality Home\20231012\	 Remote site: /out
Filename Filesize Filetype Last modified	Double click on the log fait(s) to initiate the download.
	Filesare Filesare Filesare Filesare Last modified Permis Owner
	12345_TEST_08022023_0130PM_ActivitiesImport.xml 1,020_Text D 10/10/2023 5:51:24 PM -rwwr-s

4. Access the log file from within the system where the files are stored. This step is determined by how providers set up their log retrieval process within their systems.

File Home	Share View				/	
Pin to Quick copy access	Paste & Cut Copy path Paste Paste shortcut	Move Copy to* to* Delete Rename	New item •	Properties	Select all Select none Invert selection Select	
$\leftarrow \rightarrow \star \uparrow$	🦲 « Provider » sFTP	> 12345_ITEST	~ ^ত	Search SFTP		
📌 Quick access	*	Name	Statu esimport.xml 1,020 Text D	us Date modi 10/10/2023 5:51:24 PM	fied Type	imer



Chapter 4 | File Upload Errors

There may be times in which the file upload fails. The user will receive an error message.

- Incorrect File Name: From the File Upload window, select Upload to upload the XML file > receive an error message about incorrect file name. The XML file is not uploaded, and the Provider Documentation (Activity) records are not created in iConnect.
 - a. **How to Correct:** The file name must match the required naming convention.

[Submitter ID]_ MMDDYYYY_HHMMAM or HHMMPM_ActivitiesImport.xml Example filename: 12345_EXAMP_ 09022019 1020AM ActivitiesImport.xml

e Upload Form - Inte	rnet Explorer		
ttps://ltssbh1.mediw	are.com/FLAPDInterfaceTest/Dialog	ıs/FileUpload.aspx	
Provider: 12345	Example Provider		
File: C:\Users\jer	nifer.buck\Desktop\ IIII	09 Browse Upload	
Uploaded:	File Name	2KB	Time
Me	Rea sage from webpage	le name.	

- 2. **ID in Provider Field:** Download log indicates that the import failed due to "ID in the Provider field is not associated to the submitting Provider."
 - a. **How to correct:** Contact the WSC for the consumer and request that they create a Provider Selection record in the consumer's record.



File	Jit Format View Help
=o]	{shelia.mott@apdcares.org,Service Provider,fi0eygtp0svfdgsja2xx2k0g} Start Log for CaseNo: 16483
ROR]	{shelia.mott@apdcares.org,Service Provider,fi0eygtp0svfdgsja2xx2k0g} ID in Provider field is not associated to the submitting provider
=0]	{shelia.mott@apdcares.org,Service Provider,fi0eygtp0svfdgsja2xx2k0g} End Log for CaseNo: 16483
=0]	{shelia.mott@apdcares.org,Service Provider,fi0eygtp0svfdgsja2xx2k0g} Start Log for CaseNo: 16483
ROR]	{shelia.mott@apdcares.org,Service Provider,fi0eygtp0svfdgsja2xx2k0g} ID in Provider field is not associated to the submitting provider
=o]	{shelia.mott@apdcares.org,Service Provider,fi0eygtp0svfdgsja2xx2k0g} End Log for CaseNo: 16483
=o]	{shelia.mott@apdcares.org,Service Provider,fi0eygtp0svfdgsja2xx2k0g} Start Log for CaseNo: 17178
ROR]	{shelia.mott@apdcares.org,Service Provider,fi0eygtp0svfdgsja2xx2k0g} ID in Provider field is not associated to the submitting provider
=0]	{shelia.mott@apdcares.org,Service Provider,fi0eygtp0svfdgsja2xx2k0g} End Log for CaseNo: 17178

 Destination Folder: From the File Upload window, select Upload to upload the XML file > receive an error message about a missing destination folder. The XML file is not uploaded, and the Provider Documentation (Activity) records are not created in iConnect.

a.	How to correct: Contact iConnect Support Desk at 800-400-3240.

🧉 File Upload	Form - Int	ernet Explorer	and made		Ē	23
e https://ltss	bh1. medi v	ware.com/FLAPDInte	erfaceTest/Dialog	gs/FileUpload.asp	х	
Provider:	15498 - P/	ALMETTO SUPPORT SERV				
FileType:	Activities	Import 🗸				
File:				Browse Upload		
Upload Dir	ectory:	15498_PALME\IN				
Uploaded:		File Name		Size	Time	
			Ready			
Message f	rom webp	oage			x	
	Upload Please o	aborted.The destina :heck the upload dir	tion folder doesi ectory configura	n't exist on the se tion for the vende	over. or.	

- Submitter ID: From the File Upload window, select Upload to upload the XML file > receive an error message about mis-matching Submitter ID. The XML file is not uploaded, and the Provider Documentation (Activity) records are not created in iConnect.
 - a. **How to correct:** The Submitter ID in the XML file must be the iConnect Provider/Vendor ID plus the first 5 characters of the Providers last name and be the same as the Provider selected in the "Provider" field on the File Upload page.



e Upload Form - Internet Explorer		
ttps://fwtest.harmonyis.net/FLAPDSandbo	x/Dialogs/FileUpload.aspx	
Provider: 10002 - A TEST Provider		
FileType: Activities Import		
File:	Browse Upload	
Upload Directory: 10002 A TES\IN	×	
message from weopage	Time	
Upload aborted. Incorrect S	ubmitterID for the selected provider.	
	ОК	

- Error Occurred. From the File Upload window, select Upload to upload the XML file > receive an error message about an error processing the file. The XML file is not uploaded, and the Provider Documentation (Activity) records are not created in iConnect.
 - a. **How to correct**: Check the Downloads folder on My Dashboard for the error log. Select the correct log file and click Download. Update the XML file for each error and resubmit the file.



Provider: 12345 -	Example Provider	ы раюдул пеороаларх	
FileType: Activitie	s Import		
File: C:\Users\jer	nnifer.buck\Desktop\1	Browse Upload	
Upload Directory:	16941_PURIF\IN		
Uploaded:	Cile Name	Size	Time
Message from wel	opage occurred during processing t	file, please check the Error Log File.	3
		ОК	



Provider: 1	2345 - ExampleProv	vider 🗸				
FileType:	ctivities Import	~				
File: C:\Us	ers\jennifer.bucl	k\Desktop\16941_P	URIF_09 Brows	se Upload		
Upload Direct	tory: 16941	_PURIF\IN				
Uploaded:	File	Name		Size	Time	
			Ready			
Message f	rom webpage				×	
4	File is success File. Review and re the corrected	fully imported but v solved those errors records and import	vith Errors, please o and generate a nev again.	heck the Error Log v XML file with jus	t.	
				ОК		





Example 1: Authorization in the file is terminated.

Example 2: The value sent for Contact Type (Provider Documentation) does not match one of the enforced values.

Example 3: Null Reference Exception. The XML file does not contain all of the required placeholders. i.e. place of service, location, primary diagnosis.

1	11271_ALVAR_07012020_1230PM_Activitiesimport.xml - Notepad		_
l	File Edit Format View Help		
	2020-08-11 11:15:04,711 [INFO] {buckBapdcares.org,APD Main,bana3yx;14fyobhkbuz3ywzt3} start Log for CaseNo: 61907	nstance of an object.	*
	at FW. BusinessRules.ActivitiesImport.Engine.Kaildation.Vaildations.VaildateRequired/FieldsAcitivitiesSetupModel (ActivitiesSetupModel) setupModel, Caseno ca: at FW. BusinessRules.ActivitiesImport.Engine.Engine.ProcessInputrile(String filePath, String filePath, String forPath, String connection, Int32 userId)	seno)	

Example 4: AuthService ID is a require field. The XML file may contain an AuthService ID, but the Authorization must be a 'valid' auth. Activities should only be sent for approved authorizations. Unable to Send, Terminated, Rejected.

 2020-12-29 14:31:03,318 [INFO] -- rama.macherla@apdcares.org,Service Provider,euytfsz5zjfwwn0x2pnugg42} -- AuthServiceID is required field

 2020-12-29 14:31:03,335 [ERROR] -- frama.macherla@apdcares.org,Service Provider,euytfsz5zjfwwn0x2pnugg42} -- AuthServiceID is required field

 2020-12-29 14:31:03,339 [ERROR] -- frama.macherla@apdcares.org,Service Provider,euytfsz5zjfwwn0x2pnugg42} -- AuthServiceID is required field

 2020-12-29 14:31:03,343 [ERROR] -- frama.macherla@apdcares.org,Service Provider,euytfsz5zjfwwn0x2pnugg42} -- AuthServiceID is required field

 2020-12-29 14:31:03,343 [ERROR] -- frama.macherla@apdcares.org,Service Provider,euytfsz5zjfwwn0x2pnugg42} -- AuthServiceID is required field

 2020-12-29 14:31:03,355 [INFO] -- frama.macherla@apdcares.org,Service Provider,euytfsz5zjfwwn0x2pnugg42} -- frama.macherla@apdcares.org,Service Provider,euytfsz5zjfwwn0x2pnugg42} -- frama.macherla@apdcares.org,Service Provider,euytfsz5zjfwwn0x2pnugg42 -- frama.macherla@apdcares.org, Service Provider,euytfsz5zjfwwn0x2pnugg42 -- frama.macherla@apdcares.org, Service Provider,euytfsz5zjfwwn0x2pnugg42 -- frama.macherla@apdcares.org, Service Provider, euytfsz5zjfwwn0x2pnugg42 --- frama.macherla@apdc

How to correct: Review the authorization in the provider record and if the status is Unable to Send, Terminated, or Rejected contact the consumer's WSC.

