State of Florida
Agency for Persons with Disabilities

WellSky for APD iConnect
External Provider Activities Import
V3.1

Table of Contents

Introduction 3
Chapter 1 | Setup 4
Data Elements, Mapping, and File Layout 4
External Provider Activity Import Report 7
Application Configuration 10
My Dashboard > My Files > Upload 10
Utilities > Interface Configuration .....**Error! Bookmark not defined.**
Processing .....**Error! Bookmark not defined.**
Chapter 2 | Workflow 12
Upload the XML File 12
Viewing the Activity (Provider Documentation) Record 14
File Upload Errors 15

Introduction

FL Agency for the Persons with Disabilities (APD) has contracted with WellSky to allow providers to import select data into APD 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 APD iConnect system. This includes service logs, daily attendance logs, daily progress notes, and trip logs.

Chapter 1 | Setup

Data Elements, Mapping, and File Layout

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

```
<?xml version="1.0" encoding="UTF-8"?>
<activitiesimport submitterID="11271_ALVAR">
   <consumers>
      <caseno caseno="[redacted]"><!--Required. Match Field. -->
         <firstname>[redacted]</firstname><!--Required. Match Field. -->
         <lastname>[redacted]</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. -->
            </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>11271</program><!--Required. Match Field. -->
            <vendorserviceid>166077</vendorserviceid><!--Required. Match Field. -->
            <totalcost></totalcost>
            <units>3</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>
```

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 APD iConnect that provides the iConnect generated data elements. See the External Provider Activity Report 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>	Y	Contains the iConnect generated ID for the provider plus the first 5 letters of the Provider name.
Case No.	<caseno>	Y	iConnect generated ID number for the consumer
Consumer First Name	<firstname>	Y	Must match iConnect value
Consumer Last Name	<lastname>	Y	Must match iConnect value
Start Date	<startdate>	Y	Sample Date: 2020/12/25. Multiple values can be sent. i.e. Daily Attendance Logs. See Example 2 below.
Start Time	<starttime>	Y	Sample time: 15:30:00
End Date	<enddate>	Y	Sample Date: 2020/12/25. Multiple values can be sent. i.e. Daily Attendance Logs. See Example 2 below.
End Time	<endtime>	Y	Sample time: 15:30:00
Authorization ID	<authorization>	Y	iConnect generated ID number for the authorization
Authorization Service ID	<authserviceid>	Y	iConnect generated ID number for the authorized service
MemberID	<workerid>	Y	iConnect generated ID number for the worker on the submitting Provider's record.
Location	<location>	Y	Do not send a value, but the following placeholder must exist in the file: <location></location>
Primary Diagnosis	<primarydiagnosis>	Y	Do not send a value, but the following placeholder must exist in the file: <primarydiagnosis></primarydiagnosis>
Status	<status>	Y	Must equal Complete
Program	<program>	Y	iConnect generated ID number for the provider. An open iConnect Provider Selection record must exist for this provider on the consumer's record.

VServiceID	<vendorserviceid>	Y	iConnect generated ID number for the authorized service for the provider.
Total Cost	<totalcost>	Y	Do not send a value, but the following placeholder must exist in the file: <totalcost></totalcost>
Units	<Units>	Y	Send the total number of units for the activity. APD 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>	Y	Do not send a value, but the following placeholder must exist in the file: <placeofservice></placeofservice>
Note	<groupnote>	Y	10,000 character limit.
Provider Documentation	<contacttype>	Y	Multiple values can be sent. See Example 3 below.

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

```
<?xml version="1.0" encoding="UTF-8"?>
<activitiesimport submitterID="11271_ALVAR">
   <consumers>
      <caseno caseno="[redacted]"><!--Required. Match Field. -->
         <firstname>[redacted]</firstname><!--Required. Match Field. -->
         <lastname>[redacted]</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. -->
            </activitydatetime>
            <activitydatetime>
               <startdate>2020/07/07</startdate><!-- Required. -->
               <starttime>14:30:00</starttime><!-- Required. -->
               <enddate>2020/07/07</enddate><!-- Required. -->
               <endtime>15:30:00</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>11271</program><!--Required. Match Field. -->
            <vendorserviceid>166077</vendorserviceid><!--Required. Match Field. -->
            <totalcost></totalcost>
            <units>3</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>
```

Example 3: XML file with multiple Provider Documentation types.

```
<?xml version="1.0" encoding="UTF-8"?>
<activitiesimport submitterID="11271_ALVAR">
   <consumers>
      <caseno caseno="[redacted]"><!--Required. Match Field. -->
         <firstname>[redacted]</firstname><!--Required. Match Field. -->
         <lastname>[redacted]</lastname><!--Required. Match Field. -->
         <activity>
            <activitydatetime>
               <startdate>2020/07/04</startdate><!-- Required. -->
               <starttime>15:30:00</starttime><!-- Required. -->
               <enddate>2020/07/04</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>11271</program><!--Required. Match Field. -->
            <vendorserviceid>166077</vendorserviceid><!--Required. Match Field. -->
            <totalcost></totalcost>
            <units>3</units>
            <placeofservice></placeofservice>
            <groupnote>Creating a single record through file transfer is feasible, but not efficient.</groupnote>
            <contacttype>
                <value>Progress Note</value>
                <value>Quarterly Summary</value>
            </contacttype>
         </activity>
      </caseno>
   </consumers>
</activitiesimport>
```

The XML File name must follow the required naming convention:
ProviderID_First5LettersofProviderLastName_mmddyyyy_hhmmAM_ActivitiesImport.xml

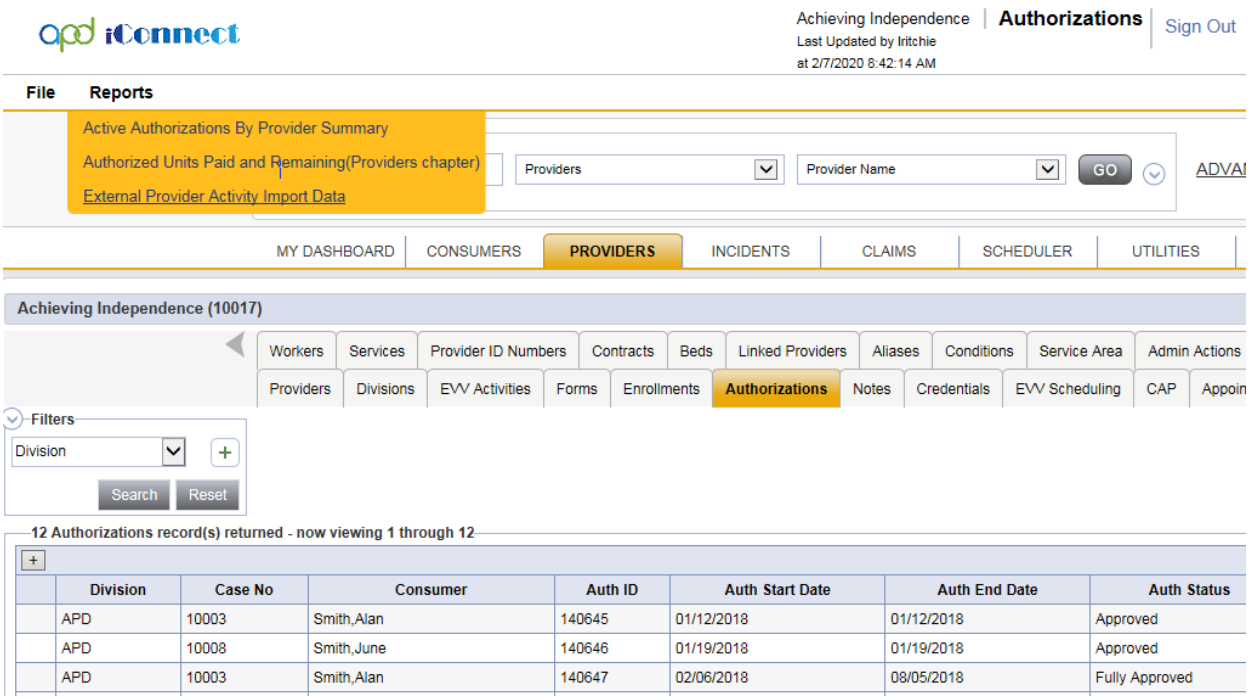
Example:
16941_PURIF_09022019_1020AM_ActivitiesImport.xml

External Provider Activity Import Report

FL APD service providers who intend to use the Provider Activity Import 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 APD iConnect that will supply the required data for each provider.

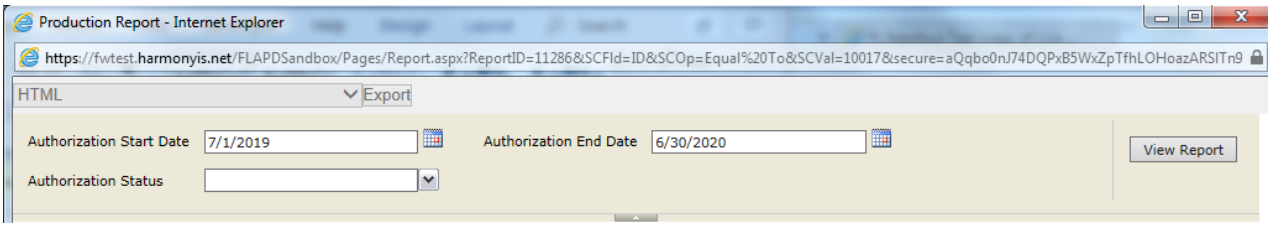
1. Navigate to the Provider record and select the Authorizations tab.

2. From the Report menu, select External Provider Activity Import Data.

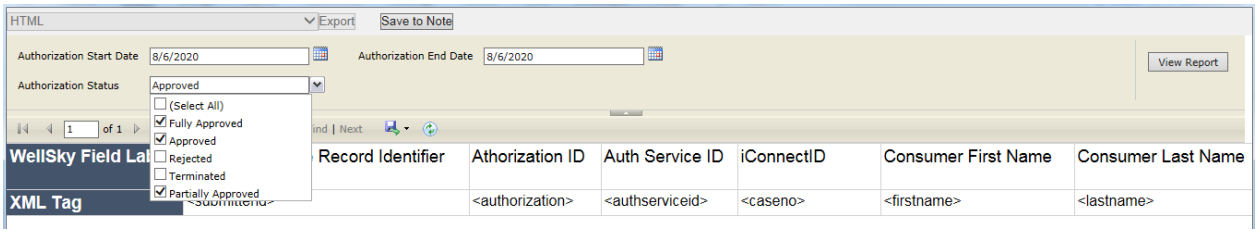


3. The report parameters window opens.

4. Select the Authorization Start Date and Authorization End Date from the calendar. This is usually the first and last day of the fiscal year



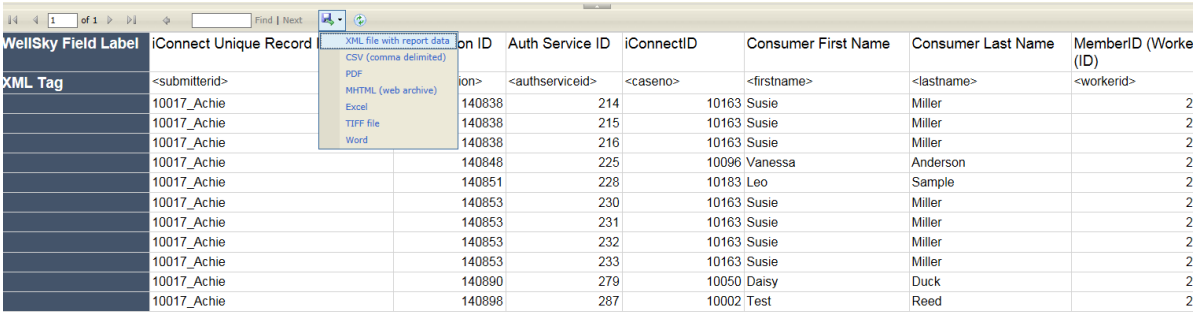
5. Typically, providers will only be interested in approved authorizations.



6. Select View Report. The results are displayed.

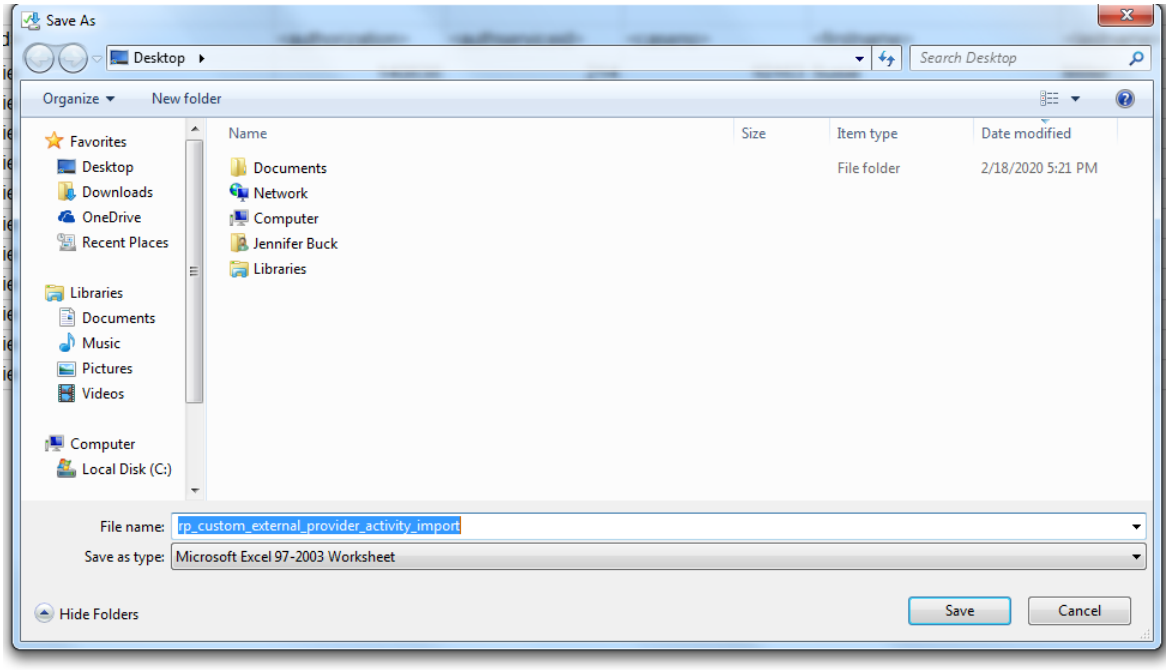
WellSky Field Label	iConnect Unique Record Identifier	Athorization ID	Auth Service ID	iConnectID	Consumer First Name	Consumer Last Name	MemberID (Worker (ID)
XML Tag	<submitterid>	<authorization>	<authserviceid>	<caseno>	<firstname>	<lastname>	<workerid>
	10017_Achie	140838	214	10163	Susie	Miller	21
	10017_Achie	140838	215	10163	Susie	Miller	21
	10017_Achie	140838	216	10163	Susie	Miller	21
	10017_Achie	140848	225	10096	Vanessa	Anderson	21
	10017_Achie	140851	228	10183	Leo	Sample	21
	10017_Achie	140853	230	10163	Susie	Miller	21
	10017_Achie	140853	231	10163	Susie	Miller	21
	10017_Achie	140853	232	10163	Susie	Miller	21
	10017_Achie	140853	233	10163	Susie	Miller	21
	10017_Achie	140890	279	10050	Daisy	Duck	21
	10017_Achie	140898	287	10002	Test	Reed	21

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



WellSky Field Label	iConnect Unique Record	on ID	Auth Service ID	iConnectID	Consumer First Name	Consumer Last Name	MemberID (Worke (ID)
XML Tag	<submitterid>	ion>	<authserviceid>	<caseno>	<firstname>	<lastname>	<workerid>
	10017_Achie	140838	214	10163	Susie	Miller	2
	10017_Achie	140838	215	10163	Susie	Miller	2
	10017_Achie	140838	216	10163	Susie	Miller	2
	10017_Achie	140848	225	10096	Vanessa	Anderson	2
	10017_Achie	140851	228	10183	Leo	Sample	2
	10017_Achie	140853	230	10163	Susie	Miller	2
	10017_Achie	140853	231	10163	Susie	Miller	2
	10017_Achie	140853	232	10163	Susie	Miller	2
	10017_Achie	140853	233	10163	Susie	Miller	2
	10017_Achie	140890	279	10050	Daisy	Duck	2
	10017_Achie	140898	287	10002	Test	Reed	2

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



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

	A	B	C	D	E	F	G	H	I	J
1	SubmitteRid	Authorization	authServiceId	CaseNo	FirstName	LastName	WorkerId	Worker_First_Name	Worker_Last_Name	VendorServiceId
2	10017_Achie	140838	214	10163	Susie	Miller	211	Lesli	Ritchie	1907
3	10017_Achie	140838	215	10163	Susie	Miller	211	Lesli	Ritchie	3920
4	10017_Achie	140838	216	10163	Susie	Miller	211	Lesli	Ritchie	3914
5	10017_Achie	140848	225	10096	Vanessa	Anderson	211	Lesli	Ritchie	3914
6	10017_Achie	140851	228	10183	Leo	Sample	211	Lesli	Ritchie	3914
7	10017_Achie	140853	230	10163	Susie	Miller	211	Lesli	Ritchie	3914
8	10017_Achie	140853	231	10163	Susie	Miller	211	Lesli	Ritchie	1907
9	10017_Achie	140853	232	10163	Susie	Miller	211	Lesli	Ritchie	3920
10	10017_Achie	140853	233	10163	Susie	Miller	211	Lesli	Ritchie	3914
11	10017_Achie	140890	279	10050	Daisy	Duck	211	Lesli	Ritchie	3914
12	10017_Achie	140898	287	10002	Test	Reed	211	Lesli	Ritchie	3914

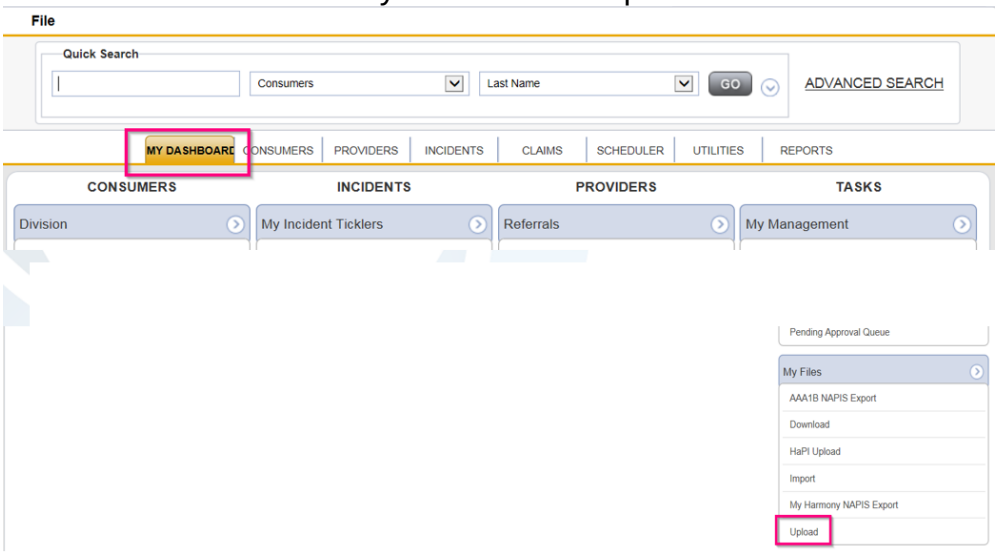
10. Import the results of this report into the receiving application or database and use the data to generate your XML file.

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

1. This access is defined at the provider > worker level. Once given access, the worker will be able to 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.



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 HIPPA Files** checkboxes. From the **File** menu, select **Save and**

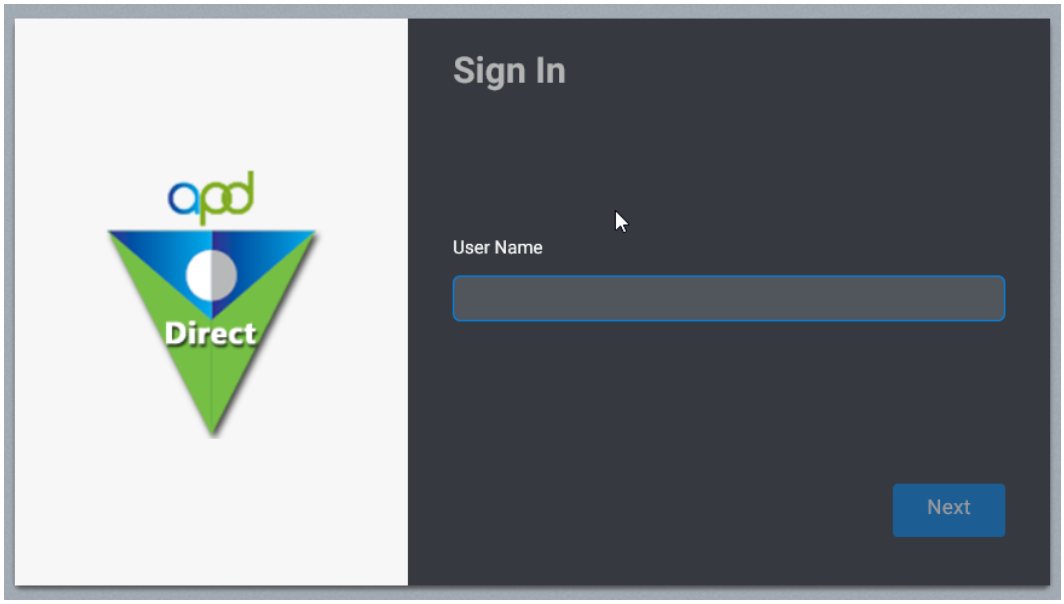
Close. This worker can now upload and download files for this provider in iConnect.

Chapter 2 | Workflow

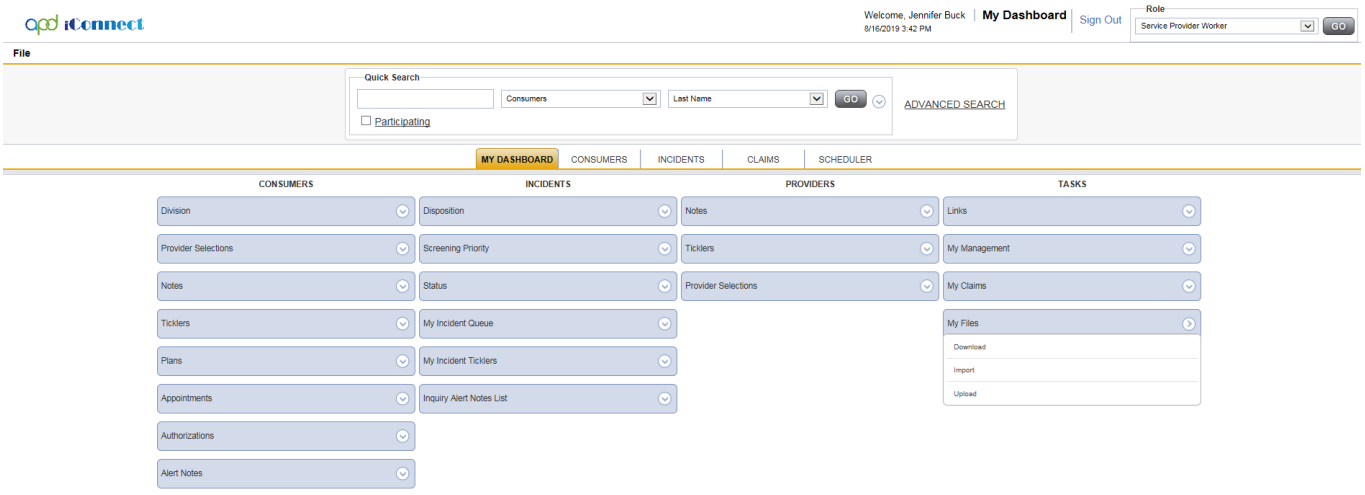
The provider will be provisioned through FL APD's ID Pass system. The provider or designed worker will log into iConnect and upload the Activities Import XML file from My Dashboard.

Upload the XML File

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

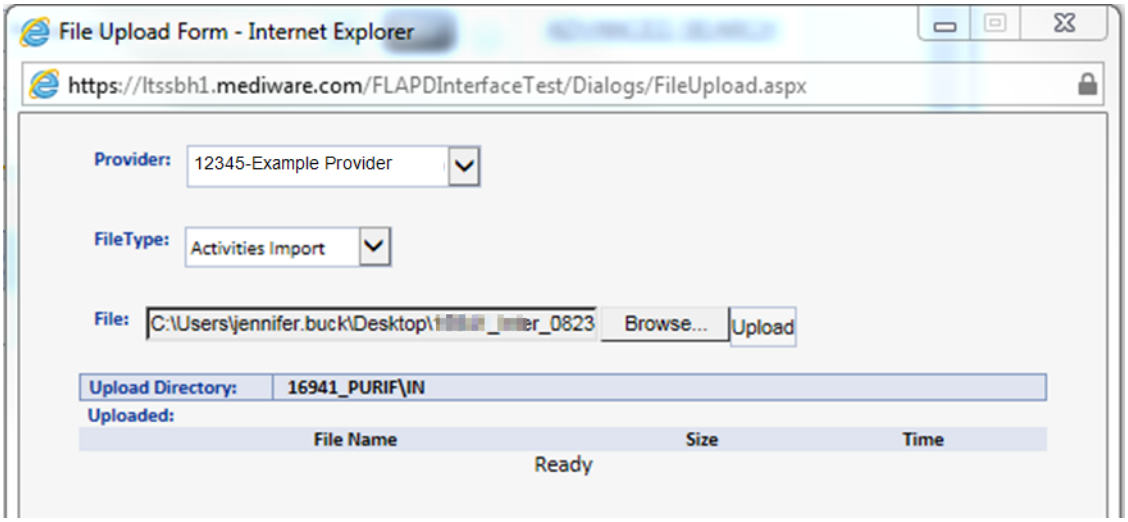


2. Using Role = Service Provider Worker, navigate to **My Dashboard** > **Tasks** > **My Files** > **Upload**.

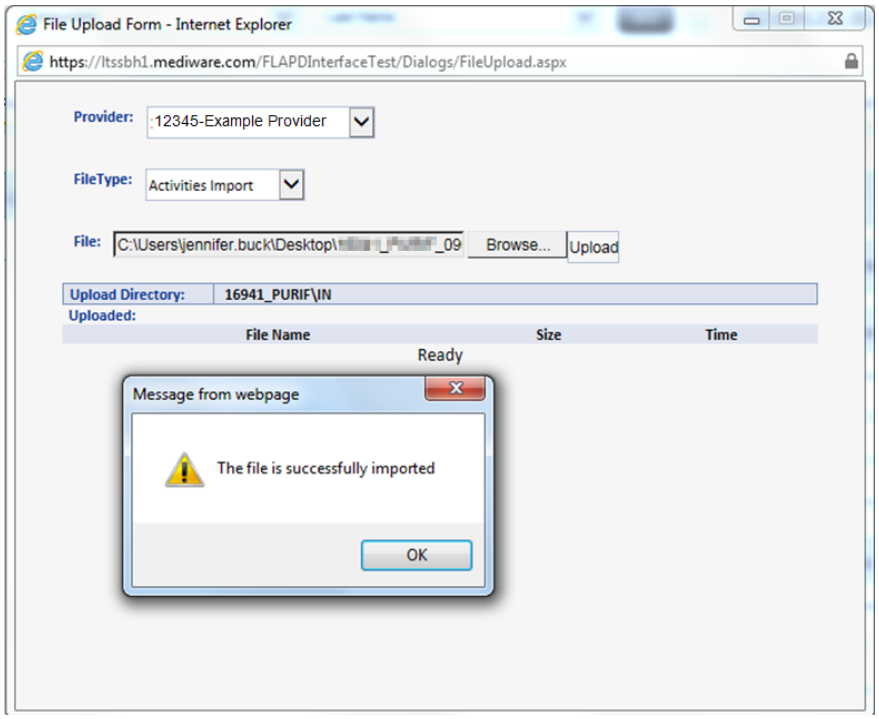


3. The File Upload window displays. Update the following fields:

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.



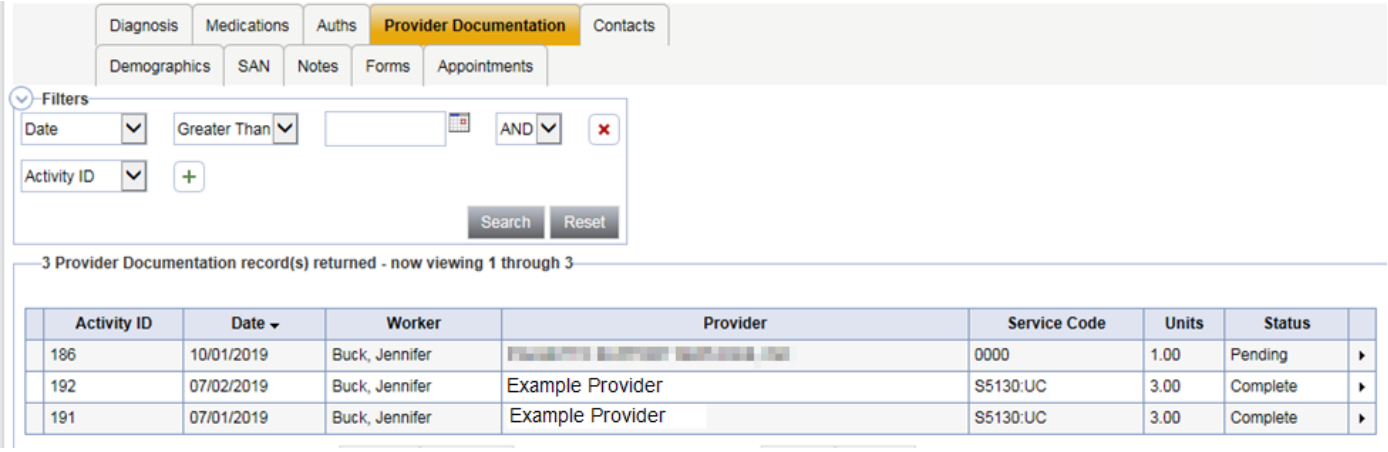
4. Receive import success notification. Select OK.



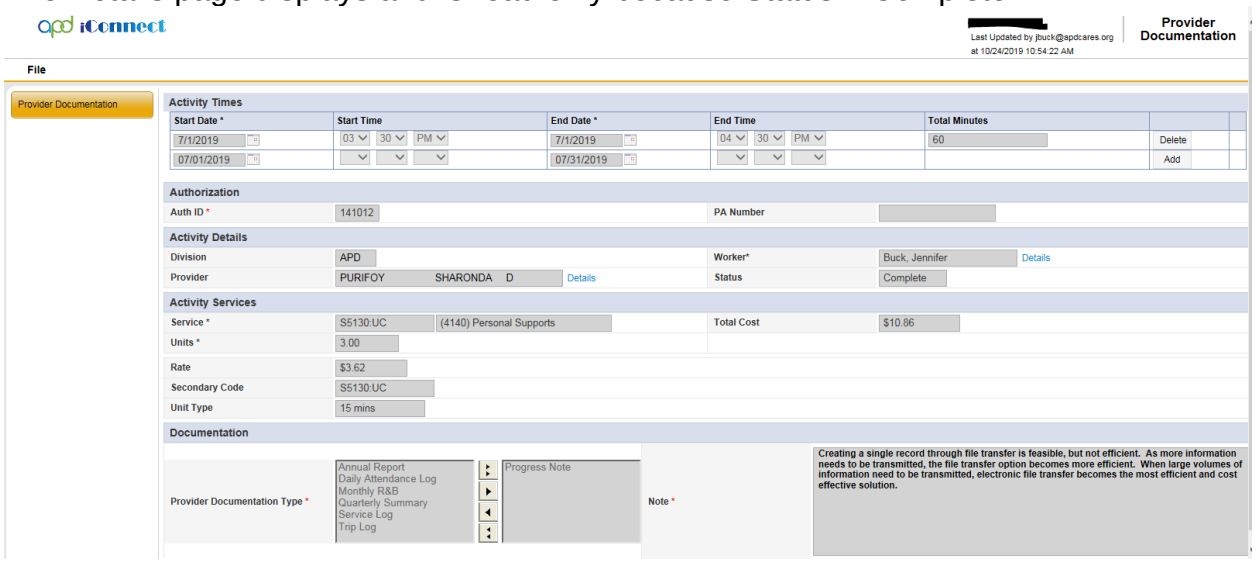
Viewing the Activity (Consumer's Provider Documentation) Record

1. Navigate to the Consumer's record that was in the XML file.

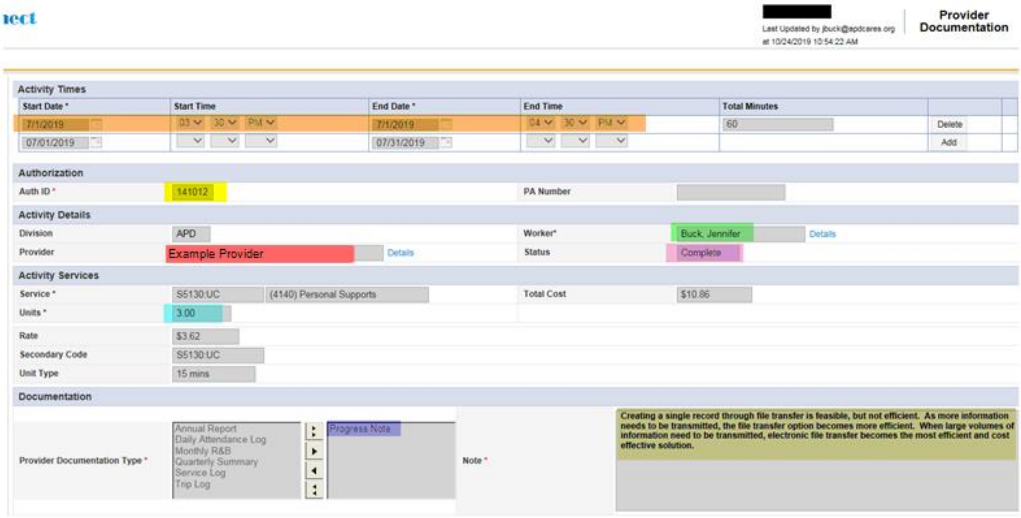
2. Select the **Provider Documentation** tab. From the list view, select the Activity (Provider Documentation) record.



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



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



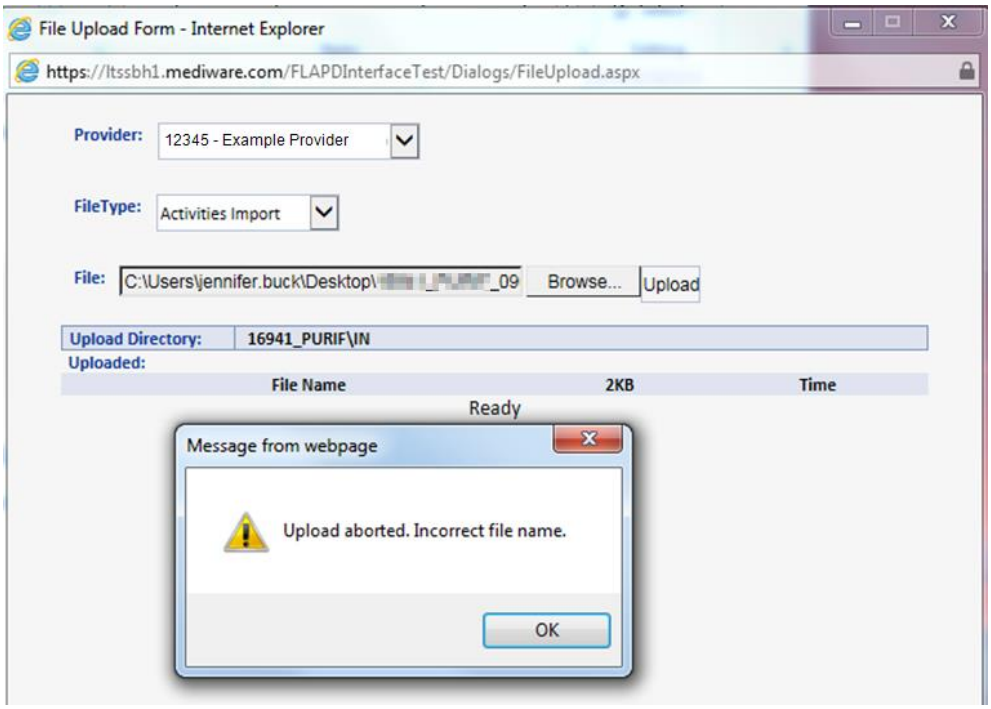
File Upload Errors

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

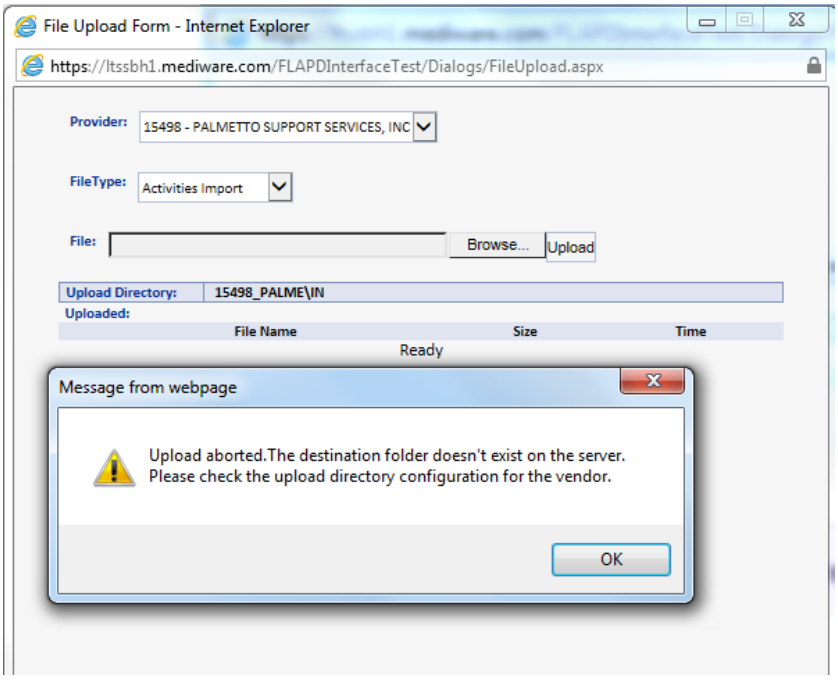
1. **Incorrect File Name**: From the File Upload window, select Upload to upload the XML file > receive an error message about incorrect file name. The XML file is not uploaded and the Provider Documentation (Activity) records are not created in iConnect.
    a. **How to Correct:** The file name must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

    [Submitter ID]_ MMDDYYYY_HHMMAM or HHMMPM_ActivitiesImport.xml

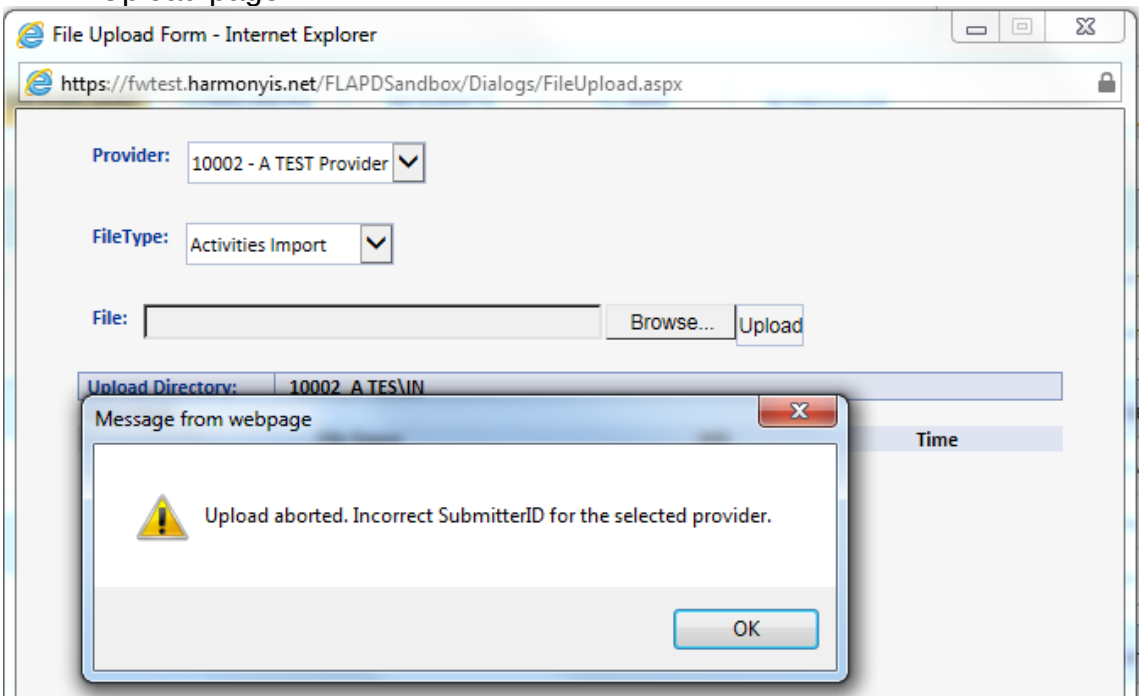
    Example filename: 16941_PURIF_ 20190902_1020AM_ActivitiesImport.xml



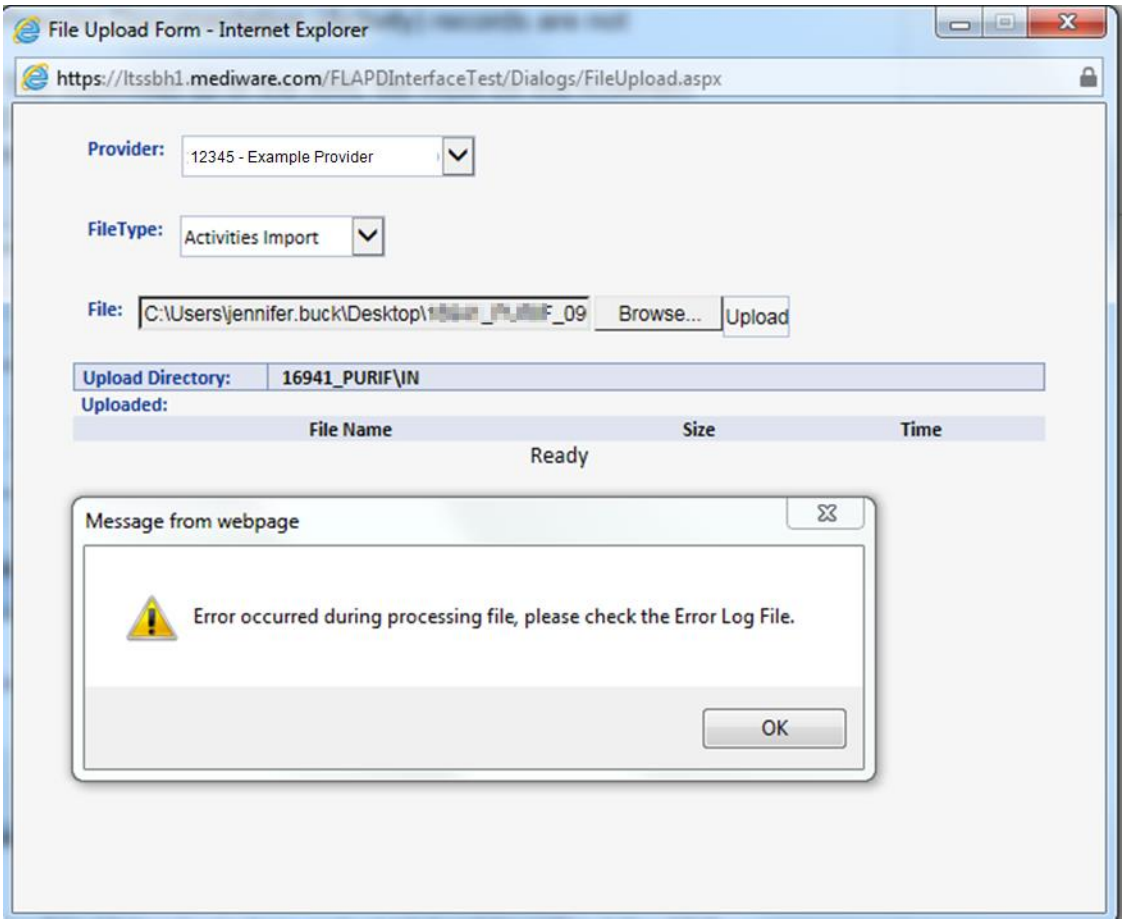
2. **Destination Folder:** From the File Upload window, select Upload to upload the XML file > receive an error message about a missing destination folder. The XML file is not uploaded and the Provider Documentation (Activity) records are not created in iConnect.
    a. **How to correct:** Contact iConnect Support Desk at 800-353-5168.

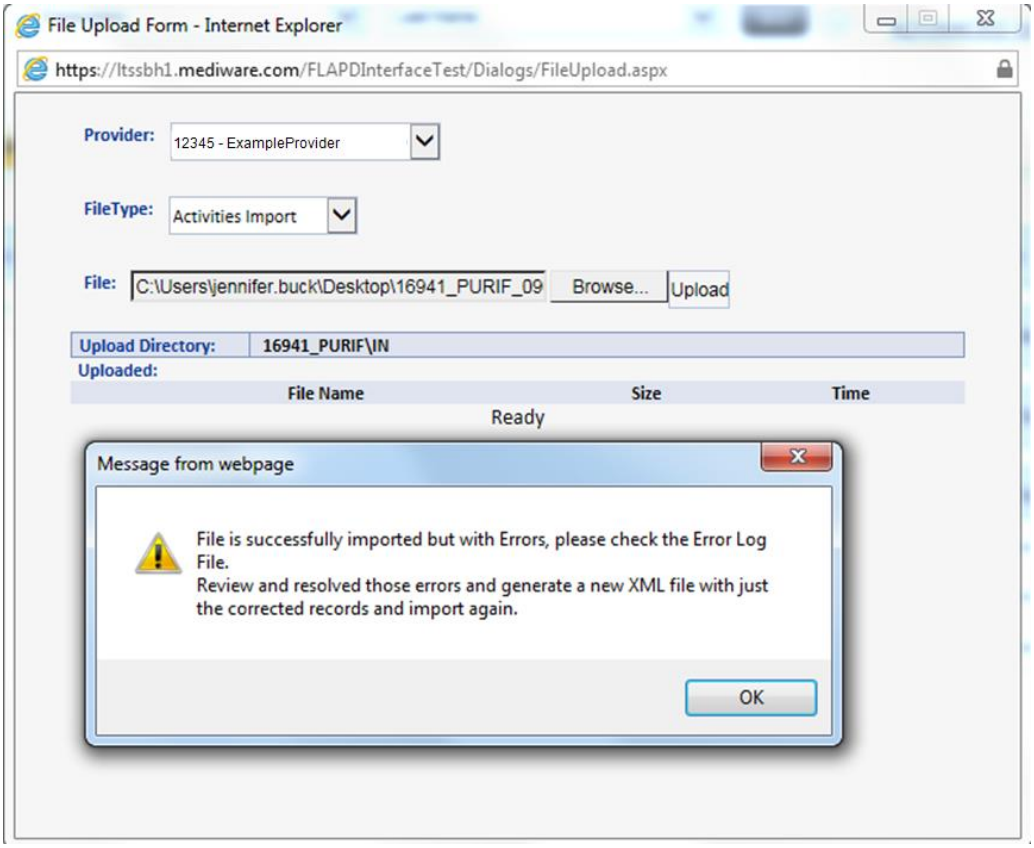


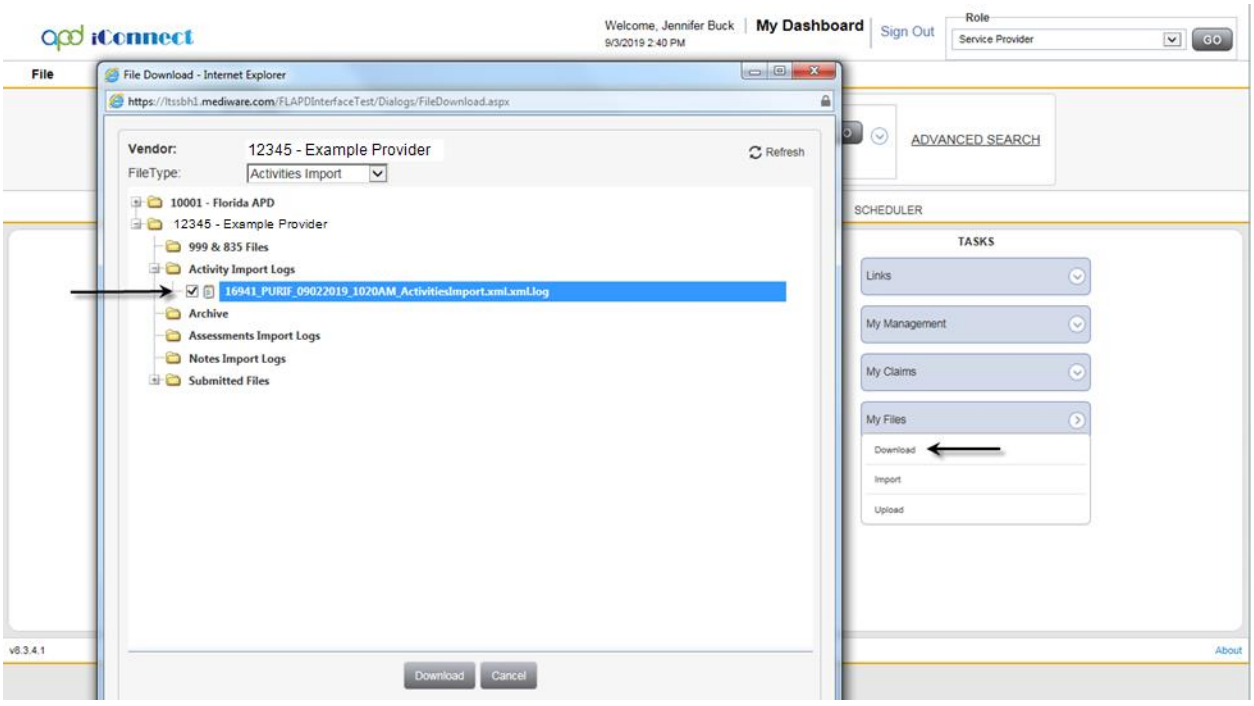
3. **Submitter ID:** From the File Upload window, select Upload to upload the XML file > receive an error message about mis-matching Submitter ID. The XML file is not uploaded and the Provider Documentation (Activity) records are not created in iConnect.
    a. **How to correct:** The Submitter ID in 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.



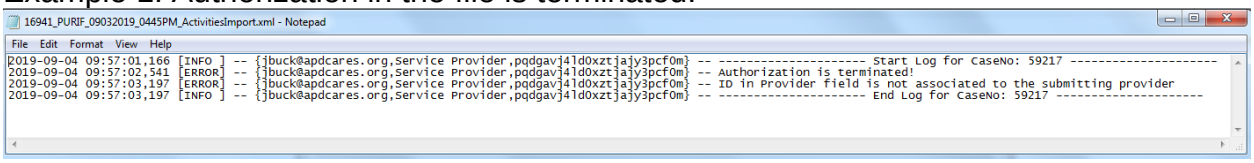
4. **Error Occurred.** From the File Upload window, select Upload to upload the XML file > receive an error message about an error processing the file. The XML file is not uploaded and the Provider Documentation (Activity) records are not created in iConnect.
    a. **How to correct**: Check the Downloads 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.


File Upload Form - Internet Explorer
https://ltssbh1.mediware.com/FLAPDInterfaceTest/Dialogs/FileUpload.aspx
Provider:
12345 - Example Provider
FileType:
Activities Import
File:
C:\Users\jennifer.buck\Desktop\
Browse...
Upload
Upload Directory:
16941_PURIF\IN
Uploaded:
File Name
Size
Time
Ready
Message from webpage
Error occurred during processing file, please check the Error Log File.
OK

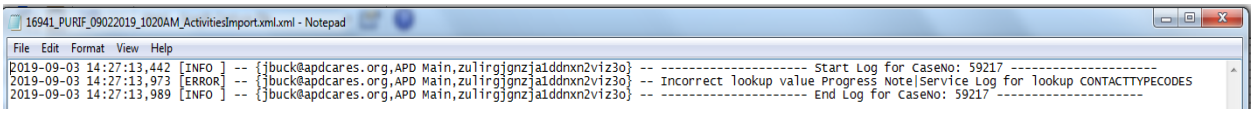

File Upload Form - Internet Explorer
https://ltssbh1.mediware.com/FLAPDInterfaceTest/Dialogs/FileUpload.aspx
Provider:
12345 - ExampleProvider
FileType:
Activities Import
File:
C:\Users\jennifer.buck\Desktop\16941_PURIF_09
Browse...
Upload
Upload Directory:
16941_PURIF\IN
Uploaded:
File Name
Size
Time
Ready
Message from webpage
File is successfully imported but with Errors, please check the Error Log File.
Review and resolved those errors and generate a new XML file with just the corrected records and import again.
OK


iConnect
Welcome, Jennifer Buck
9/3/2019 2:40 PM
My Dashboard
Sign Out
Role
Service Provider
GO
File
File Download - Internet Explorer
https://ltssbh1.mediware.com/FLAPDInterfaceTest/Dialogs/FileDownload.aspx
Vendor:
12345 - Example Provider
Refresh
FileType:
Activities Import
10001 - Florida APD
12345 - Example Provider
999 & 835 Files
Activity Import Logs
16941_PURIF_09022019_1020AM_ActivitiesImport.xml.xml.log
Archive
Assessments Import Logs
Notes Import Logs
Submitted Files
Download
Cancel
ADVANCED SEARCH
SCHEDULER
TASKS
Links
My Management
My Claims
My Files
Download
Import
Upload
v8.3.4.1
About

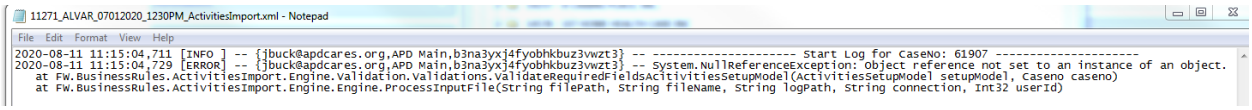
Example 1: Authorization in the file is terminated.



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.



Example 4: AuthService ID is a require field. The XML file may contain an AuthService ID but the Authorization must be a ‘valid’ auth. Activites should only be sent for approved authorizations. Not Ready to Send, Terminated, Rejected.

2020-12-29 14:31:03,318 [INFO] -- {rama.macherla@apdcares.org,Service Provider,euytfsz5zjfwwn0x2pnugg42} -- ---------- Start Log for CaseNo: 78488 ----------
2020-12-29 14:31:03,335 [ERROR] -- {rama.macherla@apdcares.org,Service Provider,euytfsz5zjfwwn0x2pnugg42} -- AuthServiceID is required field
2020-12-29 14:31:03,339 [ERROR] -- {rama.macherla@apdcares.org,Service Provider,euytfsz5zjfwwn0x2pnugg42} -- AuthServiceID is required field
2020-12-29 14:31:03,343 [ERROR] -- {rama.macherla@apdcares.org,Service Provider,euytfsz5zjfwwn0x2pnugg42} -- AuthServiceID is required field
2020-12-29 14:31:03,355 [INFO] -- {rama.macherla@apdcares.org,Service Provider,euytfsz5zjfwwn0x2pnugg42} -- ---------- End Log for CaseNo: 78488 ----------