



State of Florida
Agency for Persons with Disabilities

WellSky for APD iConnect
External Provider Activities Import
V3.1

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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

```

1  <?xml version="1.0" encoding="UTF-8"?>
2  <activitiesimport submitterID="11271_ALVAR">
3    <consumers>
4      <caseno caseno="( )"><!--Required. Match Field. -->
5        <firstname> /firstname><!--Required. Match Field. -->
6        <lastname> /lastname><!--Required. Match Field. -->
7        <activity>
8          <activitydatetime>
9            <startdate>2020/07/06</startdate><!-- Required. -->
10           <starttime>15:30:00</starttime><!-- Required. -->
11           <enddate>2020/07/06</enddate><!-- Required. -->
12           <endtime>16:30:00</endtime><!-- Required. -->
13         </activitydatetime>
14         <authorization>233777</authorization><!--Required. Match Field. -->
15         <authserviceid>125397</authserviceid><!--Match Field (not required)-->
16         <workerid>2486</workerid><!--Required. Match Field. -->
17         <location></location>
18         <primarydiagnosis></primarydiagnosis>
19         <status>Complete</status>
20         <program>11271</program><!--Required. Match Field. -->
21         <vendorserviceid>166077</vendorserviceid><!--Required. Match Field. -->
22         <totalcost></totalcost>
23         <units>3</units>
24         <placeofservice></placeofservice>
25         <groupnote>Creating a single record through file transfer is feasible, but not efficient.</groupnote>
26         <contacttype>
27           <value>Progress Note</value>
28         </contacttype>
29       </activity>
30     </caseno>
31   </consumers>
32 </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.

```

1  <?xml version="1.0" encoding="UTF-8"?>
2  <activitiesimport submitterID="11271_ALVAR">
3    <consumers>
4      <caseno caseno="11271" <!--Required. Match Field. -->
5        <firstname> </firstname><!--Required. Match Field. -->
6        <lastname> </lastname><!--Required. Match Field. -->
7      <activity>
8        <activitydatetime>
9          <startdate>2020/07/06</startdate><!-- Required. -->
10         <starttime>15:30:00</starttime><!-- Required. -->
11         <enddate>2020/07/06</enddate><!-- Required. -->
12         <endtime>16:30:00</endtime><!-- Required. -->
13       </activitydatetime>
14       <activitydatetime>
15         <startdate>2020/07/07</startdate><!-- Required. -->
16         <starttime>14:30:00</starttime><!-- Required. -->
17         <enddate>2020/07/07</enddate><!-- Required. -->
18         <endtime>15:30:00</endtime><!-- Required. -->
19       </activitydatetime>
20       <authorization>233777</authorization><!--Required. Match Field. -->
21       <authserviceid>125397</authserviceid><!--Match Field (not required)-->
22       <workerid>2486</workerid><!--Required. Match Field. -->
23       <location></location>
24       <primarydiagnosis></primarydiagnosis>
25       <status>Complete</status>
26       <program>11271</program><!--Required. Match Field. -->
27       <vendorserviceid>166077</vendorserviceid><!--Required. Match Field. -->
28       <totalcost></totalcost>
29       <units>3</units>
30       <placeofservice></placeofservice>
31       <groupnote>Creating a single record through file transfer is feasible, but not efficient.</groupnote>
32       <contacttype>
33         <value>Progress Note</value>
34       </contacttype>
35     </activity>
36   </caseno>
37 </consumers>
38 </activitiesimport>
    
```

Example 3: XML file with multiple Provider Documentation types.

```

1  <?xml version="1.0" encoding="UTF-8"?>
2  <activitiesimport submitterID="11271_ALVAR">
3    <consumers>
4      <caseno caseno="11271" <!--Required. Match Field. -->
5        <firstname>■■■■■</firstname><!--Required. Match Field. -->
6        <lastname>■■■■■</lastname><!--Required. Match Field. -->
7        <activity>
8          <activitydatetime>
9            <startdate>2020/07/04</startdate><!-- Required. -->
10           <starttime>15:30:00</starttime><!-- Required. -->
11           <enddate>2020/07/04</enddate><!-- Required. -->
12           <endtime>16:30:00</endtime><!-- Required. -->
13         </activitydatetime>
14         <authorization>233777</authorization><!--Required. Match Field. -->
15         <authserviceid>125397</authserviceid><!--Match Field (not required)-->
16         <workerid>2486</workerid><!--Required. Match Field. -->
17         <location></location>
18         <primarydiagnosis></primarydiagnosis>
19         <status>Complete</status>
20         <program>11271</program><!--Required. Match Field. -->
21         <vendorserviceid>166077</vendorserviceid><!--Required. Match Field. -->
22         <totalcost></totalcost>
23         <units>3</units>
24         <placeofservice></placeofservice>
25         <groupnote>Creating a single record through file transfer is feasible, but not efficient.</groupnote>
26         <contacttype>
27           <value>Progress Note</value>
28           <value>Quarterly Summary</value>
29         </contacttype>
30       </activity>
31     </caseno>
32   </consumers>
33 </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.

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

The screenshot shows the iConnect web application interface. At the top right, it says 'Achieving Independence | Authorizations | Sign Out' and 'Last Updated by Iritchie at 2/7/2020 8:42:14 AM'. Below this is a navigation bar with 'File' and 'Reports'. Under 'Reports', there is a yellow highlighted menu with three options: 'Active Authorizations By Provider Summary', 'Authorized Units Paid and Remaining(Providers chapter)', and 'External Provider Activity Import Data'. To the right of this menu are search filters for 'Providers' and 'Provider Name' with a 'GO' button. Below the navigation bar are tabs for 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS' (which is selected), 'INCIDENTS', 'CLAIMS', 'SCHEDULER', and 'UTILITIES'. The main content area is titled 'Achieving Independence (10017)' and contains a grid of tabs: 'Workers', 'Services', 'Provider ID Numbers', 'Contracts', 'Beds', 'Linked Providers', 'Aliases', 'Conditions', 'Service Area', 'Admin Actions', 'Providers', 'Divisions', 'EVV Activities', 'Forms', 'Enrollments', 'Authorizations' (selected), 'Notes', 'Credentials', 'EVV Scheduling', 'CAP', and 'Appoin'. A 'Filters' section on the left has a 'Division' dropdown and 'Search' and 'Reset' buttons. Below the filters, it says '12 Authorizations record(s) returned - now viewing 1 through 12'. A table displays the following data:

Division	Case No	Consumer	Auth ID	Auth Start Date	Auth End Date	Auth Status
APD	10003	Smith,Alan	140645	01/12/2018	01/12/2018	Approved
APD	10008	Smith,June	140646	01/19/2018	01/19/2018	Approved
APD	10003	Smith,Alan	140647	02/06/2018	08/05/2018	Fully Approved

- The report parameters window opens.
- Select the Authorization Start Date and Authorization End Date from the calendar. This is usually the first and last day of the fiscal year

The screenshot shows a browser window titled 'Production Report - Internet Explorer'. The address bar shows a URL from 'fwtest.harmonyis.net'. The page content includes a form with the following fields: 'Authorization Start Date' (7/1/2019), 'Authorization End Date' (6/30/2020), and 'Authorization Status' (a dropdown menu). A 'View Report' button is located to the right of the form.

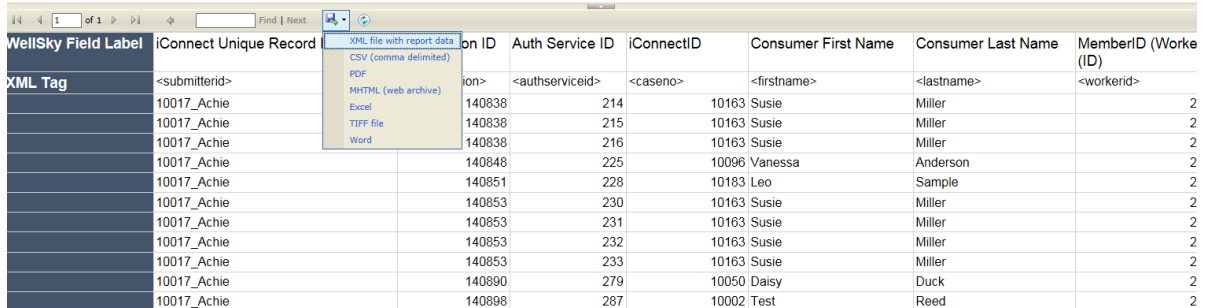
- Typically, providers will only be interested in approved authorizations.

This screenshot shows the same report parameters form as the previous one, but with the 'Authorization Status' dropdown menu open. The menu options are: 'Approved', '(Select All)', 'Fully Approved', 'Approved', 'Rejected', 'Terminated', and 'Partially Approved'. The 'Fully Approved' and 'Partially Approved' options are checked. Below the form, a table header is visible with columns: 'Record Identifier', 'Athorization ID', 'Auth Service ID', 'iConnectID', 'Consumer First Name', and 'Consumer Last Name'. The table content shows placeholder values: '<authorization>', '<authserviceid>', '<caseno>', '<firstname>', and '<lastname>'.

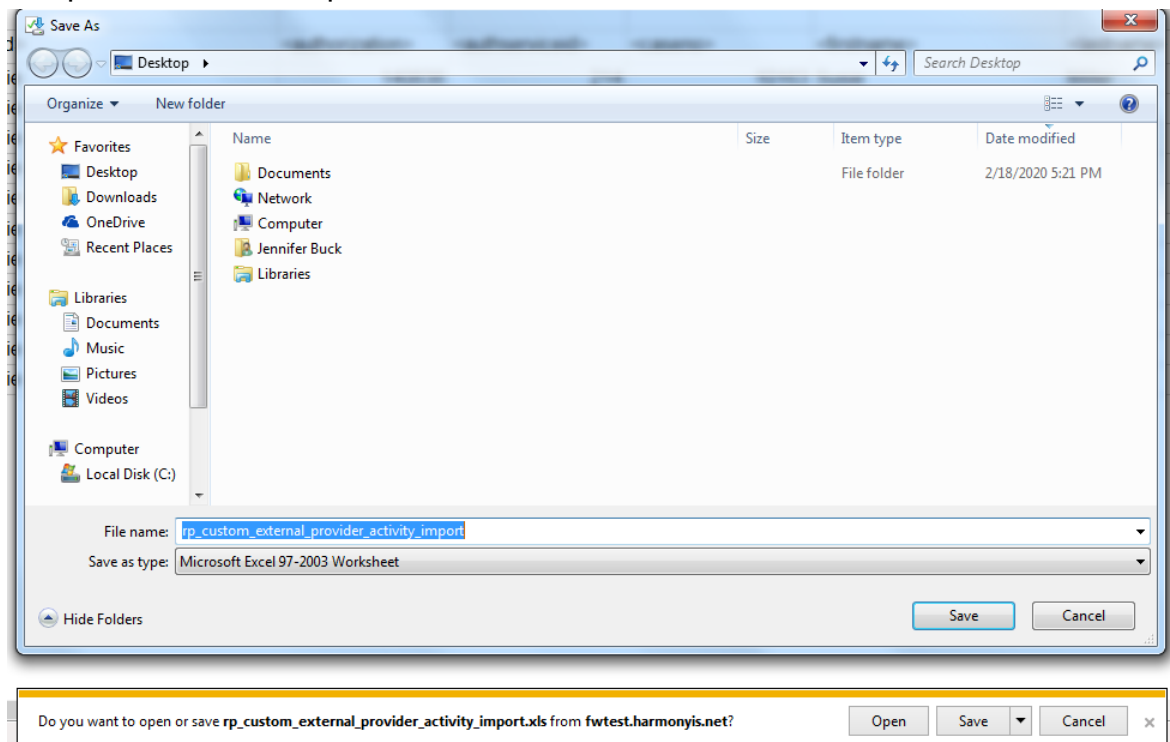
- Select View Report. The results are displayed.

WellSky Field Label	iConnect Unique Record Identifier	Authorization 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.



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.

The screenshot shows the 'File' section of the application. At the top, there is a 'Quick Search' bar with a search input, a dropdown menu set to 'Consumers', and a 'Last Name' dropdown. Below this is a navigation bar with tabs for 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS', 'INCIDENTS', 'CLAIMS', 'SCHEDULER', 'UTILITIES', and 'REPORTS'. The 'MY DASHBOARD' tab is highlighted with a red box. Below the navigation bar, there are four main sections: 'CONSUMERS' (with a 'Division' dropdown), 'INCIDENTS' (with 'My Incident Ticklers'), 'PROVIDERS' (with 'Referrals'), and 'TASKS' (with 'My Management'). On the right side, there is a 'Pending Approval Queue' section and a 'My Files' section. The 'My Files' section contains a list of actions: 'AAA1B NAPIS Export', 'Download', 'HaPI Upload', 'Import', 'My Harmony NAPIS Export', and 'Upload'. The 'Upload' button is highlighted with a red box.

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.

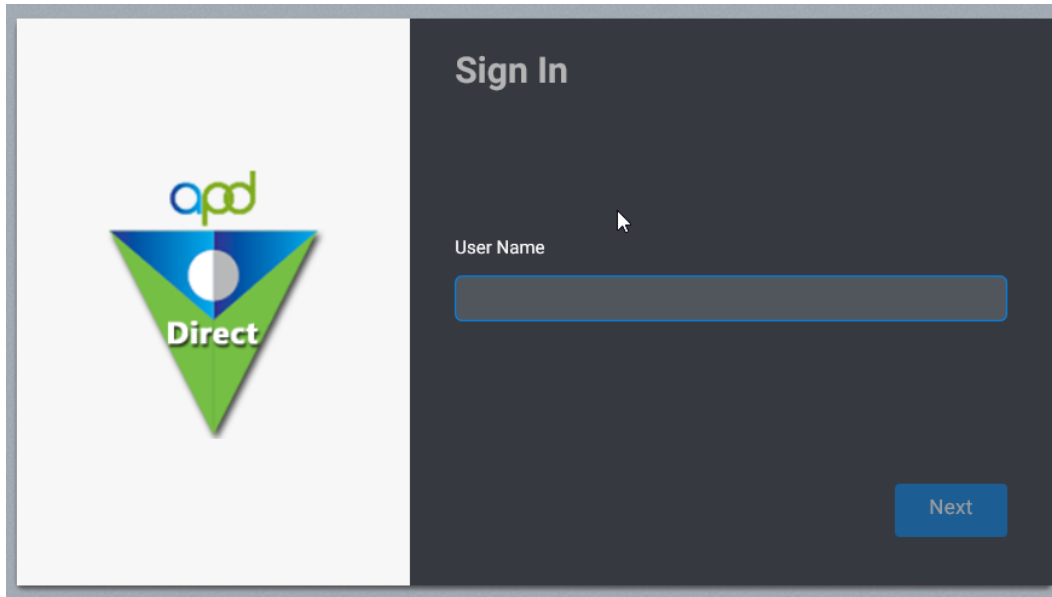


Chapter 2 | Workflow

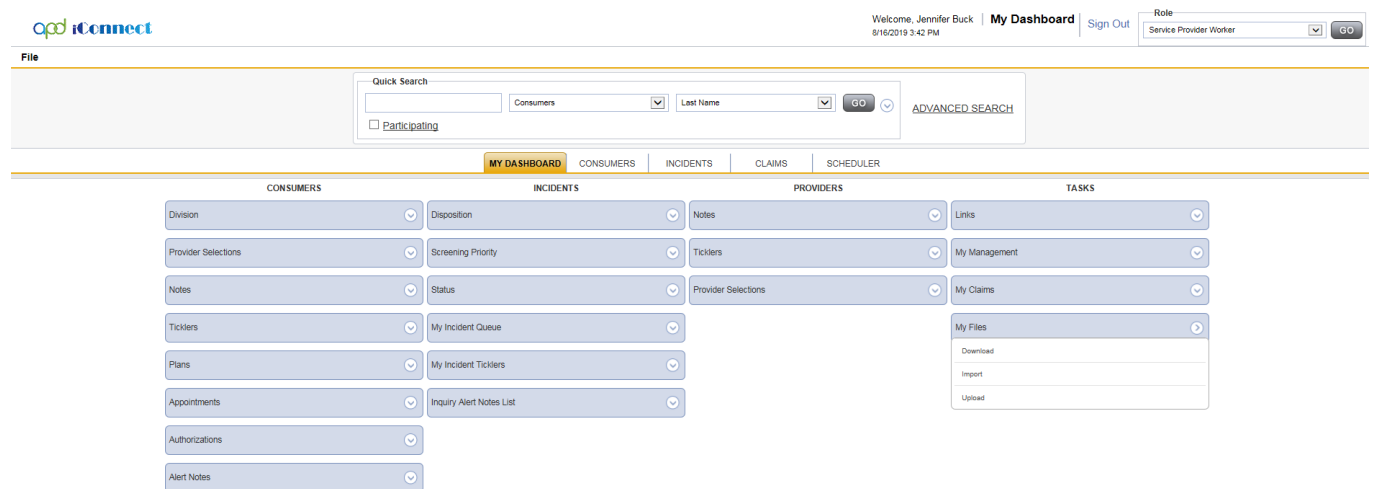
The provider will be provisioned through FL APD's ID Pass system. The provider or designed worker will log into iConnect and upload the Activities Import XML file from My Dashboard.

Upload the XML File

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

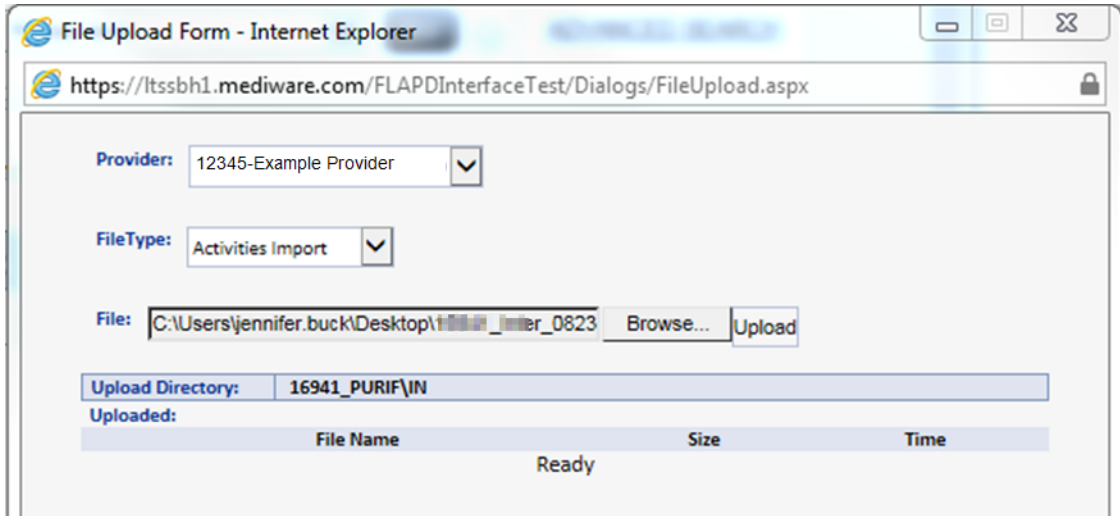


2. Using Role = Service Provider Worker, navigate to **My Dashboard > Tasks > My Files > Upload**.

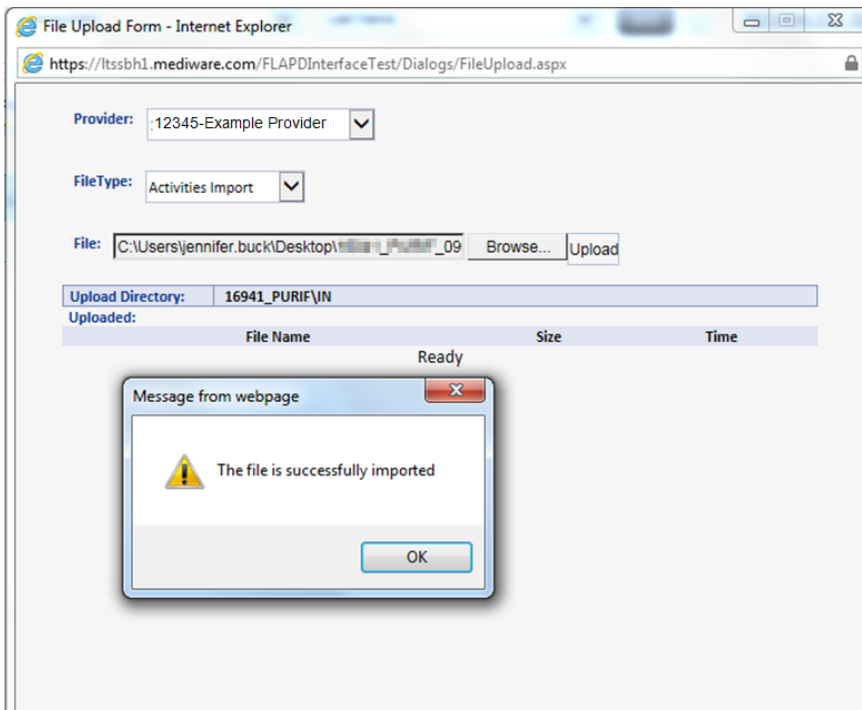


3. The File Upload window displays. Update the following fields:

- 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.

Activity ID	Date	Worker	Provider	Service Code	Units	Status
186	10/01/2019	Buck, Jennifer	Example Provider	0000	1.00	Pending
192	07/02/2019	Buck, Jennifer	Example Provider	S5130:UC	3.00	Complete
191	07/01/2019	Buck, Jennifer	Example Provider	S5130:UC	3.00	Complete

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

Provider Documentation

Last Updated by jibuck@apdcares.org at 10/24/2019 10:54:22 AM

File

Provider Documentation

Activity Times

Start Date *	Start Time	End Date *	End Time	Total Minutes	
7/1/2019	03:30 PM	7/1/2019	04:30 PM	60	Delete
07/01/2019		07/31/2019			Add

Authorization

Auth ID * 141012 PA Number

Activity Details

Division APD Worker* Buck, Jennifer Details

Provider PURIFOY SHARONDA D Details Status Complete

Activity Services

Service * S5130:UC (4140) Personal Supports Total Cost \$10.86

Units * 3.00

Rate \$3.62

Secondary Code S5130:UC

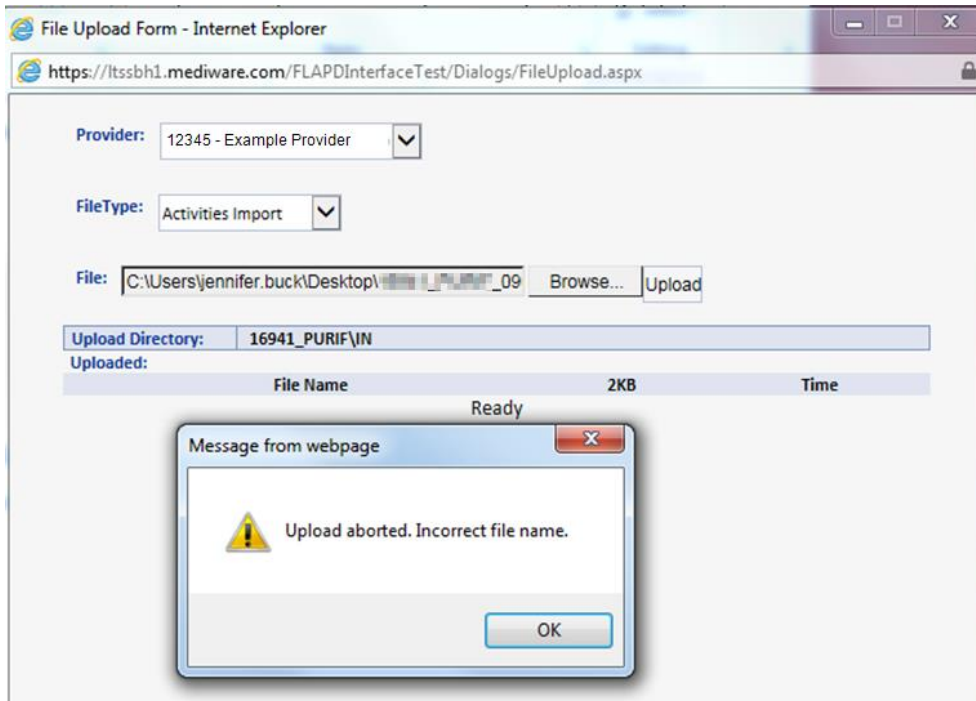
Unit Type 15 mins

Documentation

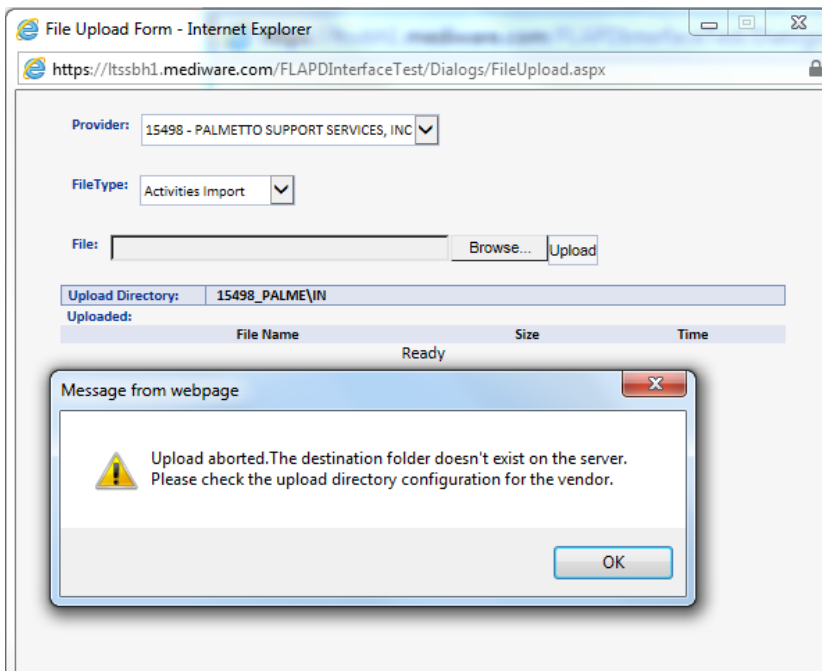
Provider Documentation Type * Annual Report, Daily Attendance Log, Monthly R&B, Quarterly Summary, Service Log, Trip Log, Progress Note, Note *

Creating a single record through file transfer is feasible, but not efficient. As more information needs to be transmitted, the file transfer option becomes more efficient. When large volumes of information need to be transmitted, electronic file transfer becomes the most efficient and cost effective solution.

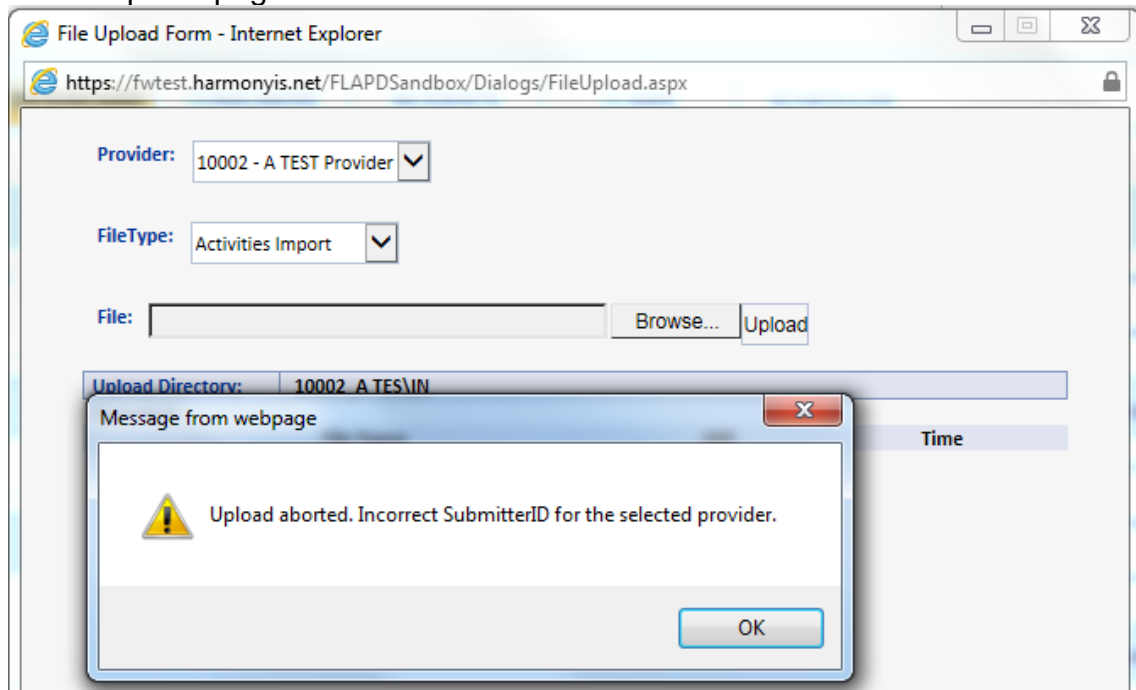
4. Below is a comparison of the data in the XML file and the data in the Activity (Provider Documentation) record in the application.



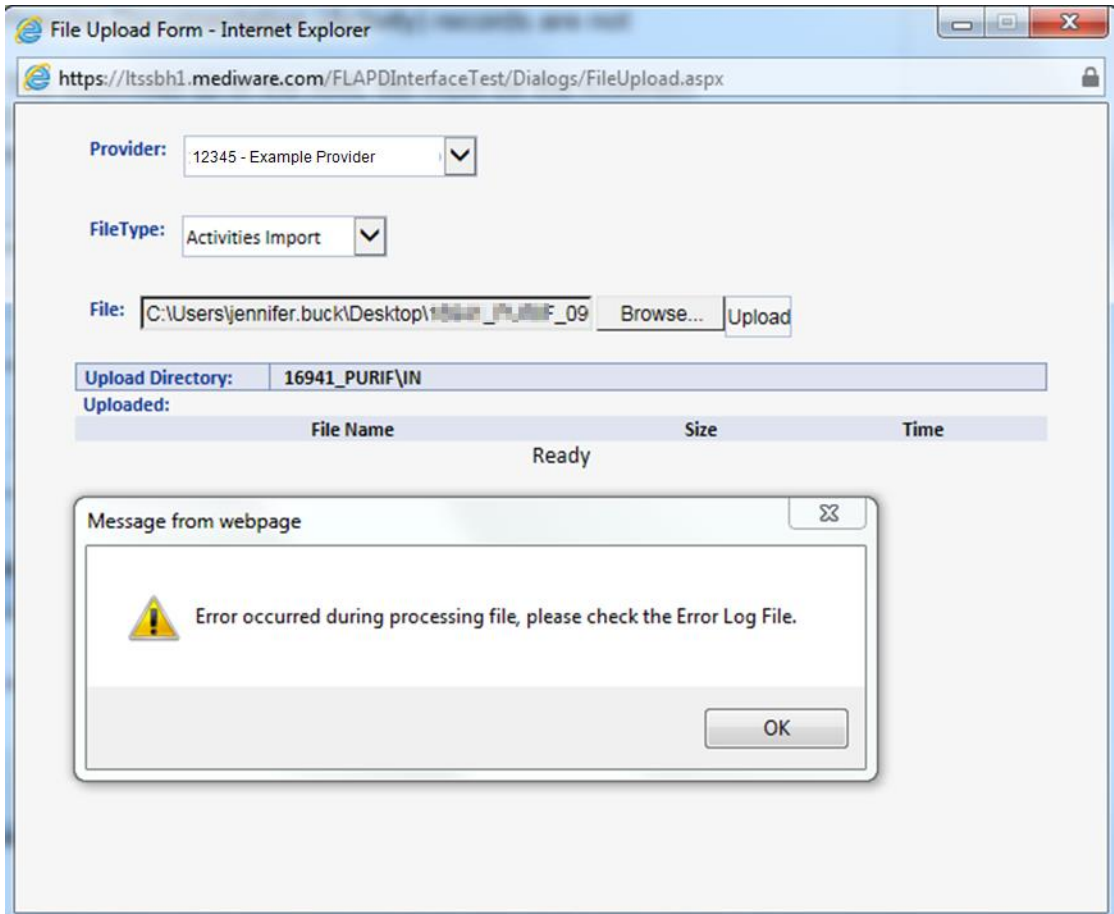
2. **Destination Folder:** From the File Upload window, select Upload to upload the XML file > receive an error message about a missing destination folder. The XML file is not uploaded and the Provider Documentation (Activity) records are not created in iConnect.
 - a. **How to correct:** Contact iConnect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

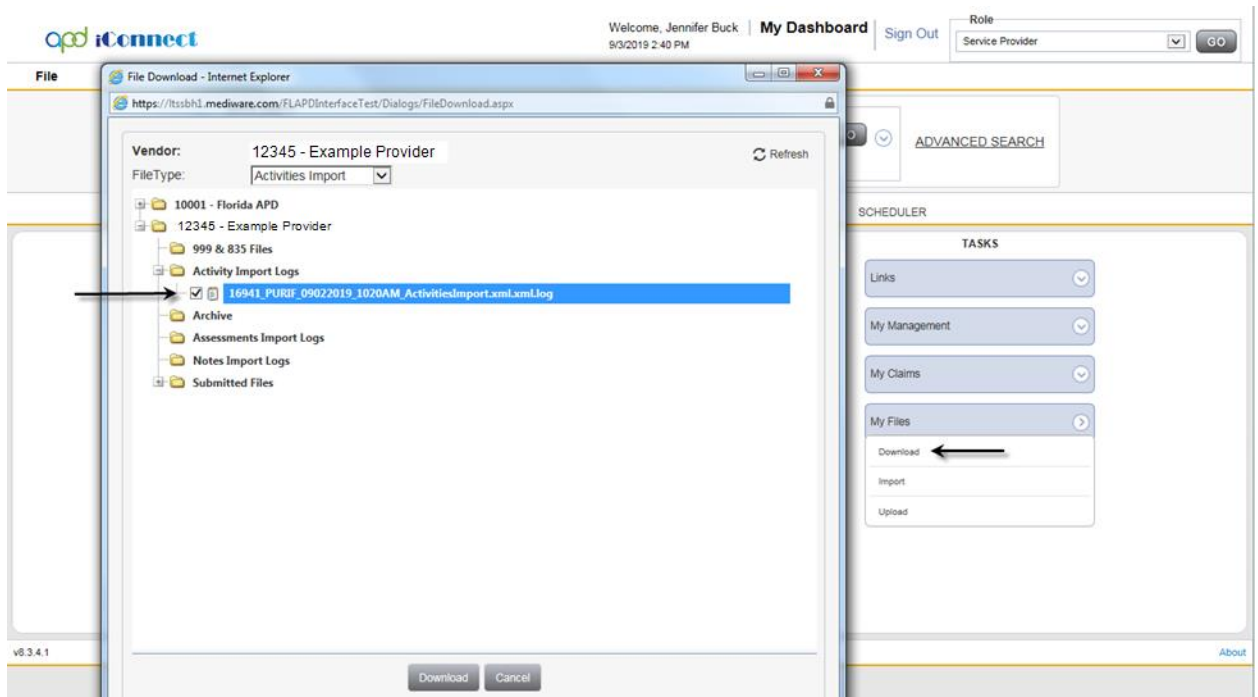
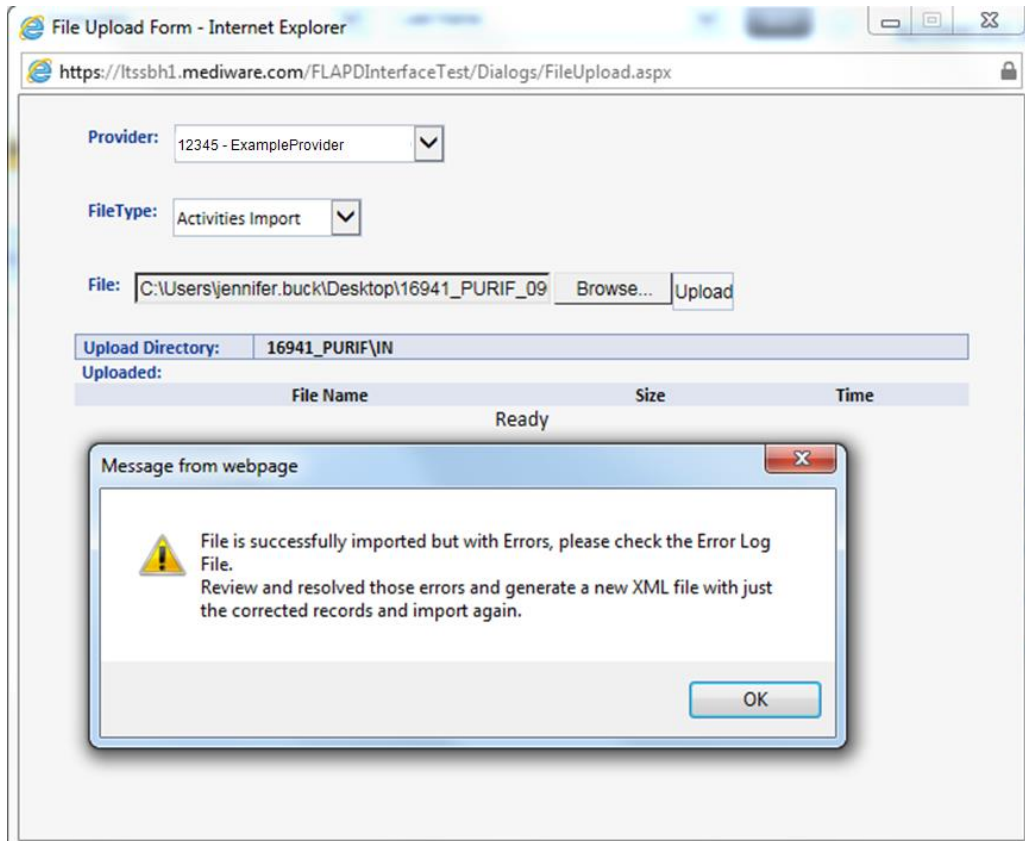


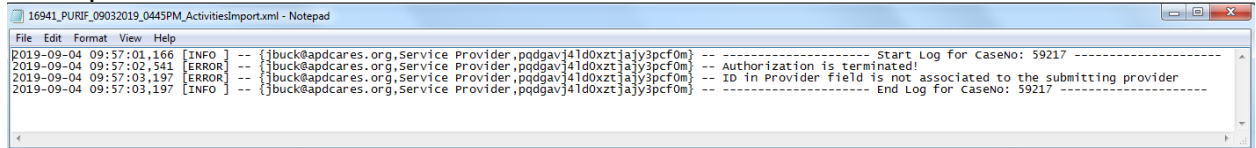
3. **Submitter ID:** From the File Upload window, select Upload to upload the XML file > receive an error message about mis-matching Submitter ID. The XML file is not uploaded and the Provider Documentation (Activity) records are not created in iConnect.
 - a. **How to correct:** The Submitter ID in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



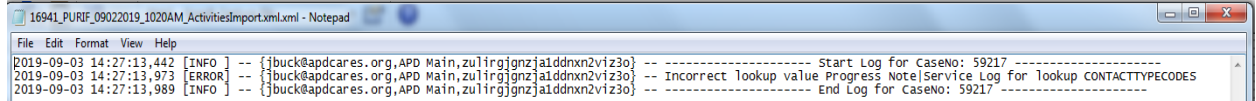


Example 1: Authorization in the file is terminated.


```

16941_PURIF_09032019_0445PM_ActivitiesImport.xml - Notepad
File Edit Format View Help
2019-09-04 09:57:01,166 [INFO] -- {buck@apdcares.org,Service Provider,pdgvavj41d0xztjajy3pcf0m} -- ----- Start Log for CaseNo: 59217 -----
2019-09-04 09:57:02,541 [ERROR] -- {buck@apdcares.org,Service Provider,pdgvavj41d0xztjajy3pcf0m} -- Authorization is terminated!
2019-09-04 09:57:03,197 [ERROR] -- {buck@apdcares.org,Service Provider,pdgvavj41d0xztjajy3pcf0m} -- ID in Provider field is not associated to the submitting provider
2019-09-04 09:57:03,197 [INFO] -- {buck@apdcares.org,Service Provider,pdgvavj41d0xztjajy3pcf0m} -- ----- End Log for CaseNo: 59217 -----

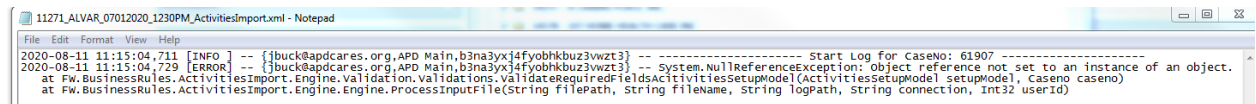
```

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


```

16941_PURIF_09022019_1020AM_ActivitiesImport.xml - Notepad
File Edit Format View Help
2019-09-03 14:27:13,442 [INFO] -- {buck@apdcares.org,APD Main,zul1rgjgnzjaldnrxn2v1z3o} -- ----- Start Log for CaseNo: 59217 -----
2019-09-03 14:27:13,973 [ERROR] -- {buck@apdcares.org,APD Main,zul1rgjgnzjaldnrxn2v1z3o} -- Incorrect lookup value Progress Note|Service Log for lookup CONTACTTYPECODES
2019-09-03 14:27:13,989 [INFO] -- {buck@apdcares.org,APD Main,zul1rgjgnzjaldnrxn2v1z3o} -- ----- End Log for CaseNo: 59217 -----

```

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


```

11271_ALVAR_07012020_1230PM_ActivitiesImport.xml - Notepad
File Edit Format View Help
2020-08-11 11:15:04,711 [INFO] -- {buck@apdcares.org,APD Main,b3na3yxj4fyobkbu3vwtz3} -- ----- Start Log for CaseNo: 61907 -----
2020-08-11 11:15:04,729 [ERROR] -- {buck@apdcares.org,APD Main,b3na3yxj4fyobkbu3vwtz3} -- System.NullReferenceException: object reference not set to an instance of an object.
at Fw.BusinessRules.ActivitiesImport.Engine.Validation.Validations.ValidateRequiredFieldsActivitiesSetupModel(ActivitiesSetupModel setupModel, Caseno caseno)
at Fw.BusinessRules.ActivitiesImport.Engine.Engine.ProcessInputFile(String filePath, String fileName, String logPath, String connection, Int32 userId)
2020-08-11 11:15:04,729 [INFO] -- {buck@apdcares.org,APD Main,b3na3yxj4fyobkbu3vwtz3} -- ----- End Log for CaseNo: 61907 -----

```

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 -----

```