

Importing Service Delivery Units by using a CSV file

The file must be saved as a “CSV” file. A CSV file adjust automatically, so you do not have to set widths for your file. The data for importing service delivery into Care Director must be in this order.

- Person ID this can be found on the service authorization
- Provider FEIN formatted as XX-XXXXXXX
- Service Description this can be found on the service authorization
- Quantity number of units billed
- Date of Service formatted as MM/DD/YYYY
- Unit Cost the unit rate
- Last name the last name of the person receiving the services
- Service Authorization this can be found on the service authorization

Example:

55555 XX-XXXXXXX EMRS – Voice Full Month 1 10/01/2018 10.00 Doe 16777

The Person ID, Service Description, and Service Authorization number can all be found on the Provider Portal. **The file that you submit for billing will not contain a header.**

You can use the attachment feature on the Provider Portal to send your import file to COA. To access Attachments you will click on the “Paperclip” icon located on the Home Page of the Portal

- Then select Accounting from the first drop down box.
- Then select CSV from the second drop down box.
- Then select browse to select your file to submit.
- Then select upload to finish the process.

We suggest a naming convention to identify each month of billing when saving your file on the Provider Portal.

NOTE: the service description must match exactly, so if the description has a dash. Your file must contain the same dash as shown in the example above.