

Importing Service Delivery Units by using a CSV file (rev 10.2020)

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.

- Client ID this can be found on the service authorization
- Provider FEIN formatted as XX-XXXXXXX
- Authorization ID This field not required. You can leave it Blank.
- HCPC This number can be found on the service authorization
- Modifier 1 This number can be found on the service authorization (If Modifier is not needed, you will need a blank in this column)
- Modifier 2 This number can be found on the service authorization (If Modifier is not needed, you will need a blank in this column)
- Modifier 3 This number can be found on the service authorization (If Modifier is not needed, you will need a blank in this column)
- Modifier 4 This number can be found on the service authorization (If Modifier is not needed, you will need a blank in this column)
- Quantity number of units billed
- Date of Service formatted as MM/DD/YYYY
- Unit Cost the unit rate
- Client Last name the last name of the person receiving the services

Example:

55555,XX-XXXXXXX, ,S5161,U2,U5, , ,2,10/01/2018 10.00 Doe

The Service Authorization information can all be found on the Provider Portal. **The file that you submit for billing must 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

- In the Category box you will need to select Accounting
- In the Sub Category box you will need to select "Excel Billing"
- Select upload attachment
- Then select browse to select your file to submit.

- Then select “Upload Attachment” to finish the process.

Once you have submitted your file if you have any errors, they will appear on the error report. If you have no errors, you will not receive this file. (the error report could take up to an hour to produce)

The error file will be listed on the Attachment screen at the bottom under the “Upload Attachment” button. The name of the file will be a “CSV”. You can open the report in excel.

NOTE: Suggest a naming convention to identify each month of billing when saving your file on the Provider Portal.