

Description: In this guide, the user will learn how to use each of the import formats in the import module.

Roles Required: Super User

Permissions Required: Import Admin

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Creating a Template

- First row must be the column headers
- Column headers should equal the field names listed below, in the order listed below, no spaces.
- All columns must be present, even if optional fields are left blank.
- Save the file as Text (tab delimited)

Reasons for Import Failure

- Columns are missing
- Incorrect column header(s)
- Invalid date(s)
- Breach of character requirements
- Spaces in column headers
- Not saved as the correct file type

If still receiving a failure message, please enter a service desk ticket.



Settings

Cost Centers

| Field # | Field | Type | Description | Required | Comments |
|---------|----------------------|---------|---|----------|--|
| 1 | CostCenterCode | String | Unique Cost Center Code | Yes | Min Length: 2 Max Length: 50 |
| 2 | CostCenterName | String | Name of the Cost Center | Yes | Min Length: 2 Max Length: 50 |
| 3 | State | String | Cost Center 2 Letter State abbreviation | Yes | The state's two letter abbreviation (i.e., AZ) |
| 4 | CostCenterReference | String | Cost Center Reference | Optional | Min Length: 2, Max Length: 200 |
| 5 | CostCenterReference2 | String | Cost Center Reference 2 | Optional | Min Length: 0 Max Length: 200 |
| 6 | TemplateId | Integer | Template Identifier | Optional | Must use existing Id in DCI using Report: "Certification Templates Report" |

Funding Source

| Field # | Field | Type | Description | Required | Comments |
|---------|-------|------|-------------|----------|----------|
|---------|-------|------|-------------|----------|----------|

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|----|-------------------|---------|----------------------------------|----------|--|
| 1 | FullName | String | Full Name | Yes | Min Length: 2 Max Length: 50 |
| 2 | Address | String | Address Line 1 | Yes | Min Length: 2 Max Length: 150 |
| 3 | Address2 | String | Address Line 2 | Optional | Min Length: 2 Max Length: 150 |
| 4 | City | String | City | Yes | Min Length: 2 Max Length: 20 |
| 5 | State | String | State | Yes | The state's two letter abbreviation (i.e., AZ) |
| 6 | PostalCode | String | Postal Code | Yes | Length = 5 numerals |
| 7 | CountryCode | String | 3 Letter Country Code | Yes | Should be USA |
| 8 | FundingSourceType | Int | Type of Funding Source (1, 2, 3) | Yes | See “Admin Guide: Static Data Reference File for Imports” in the Help Center |
| 9 | Phone | String | Phone Number | Yes | 10-digit phone number; exclude dashes and parentheses |
| 10 | AltPhone | String | Alternate Phone Number | Optional | 10-digit phone number; exclude dashes and parentheses |
| 11 | ProviderId | String | Provider Id for Funding Source | Optional | Must use existing Id in DCI |
| 12 | Email | String | Email Address | Yes | Email format: test@dcisoftware.com |
| 13 | TimeZone | String | Time Zone | Yes | See “Admin Guide: Static Data Reference File for Imports” in the Help Center |
| 14 | CostCenterId | Integer | Unique Cost Center Id | Yes | Use existing Id in DCI |



Import Formats – Admin Guide

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|----|-------------------------|---------|---|---|--|
| 15 | SleepShiftStart | Time | Sleep shift Start Time | Optional | Format: hh:mm |
| 16 | SleepShiftEnd | Time | Sleep shift End Time | Optional | Format: hh:mm |
| 17 | ProfileReference | String | Third-party reference number for the Profile | Optional | Min Length: 1 Max Length: 200 |
| 18 | EnableEDI | Bit | EDI is enabled or not | Yes | Enumeration: ● 0 - No ● 1 - Yes *This column is contingent on the instance-level setting. |
| 19 | EnableEDITransmission | Bit | EDI Transmission is enabled or not | Conditional - If (EnableEDI = Yes), the EnableEDITransmission is mandatory field, otherwise the field can be left blank | Enumeration: ● 0 - No ● 1 - Yes *This column is contingent on the instance-level setting. |
| 20 | EDISenderID | Integer | EDI Sender ID | Conditional - If (EnableEDI = Yes), the EDISenderID is mandatory field, otherwise the field can be left blank | Min Length: 1 Max Length: 200 *This column is contingent on the instance-level setting. |
| 21 | EDIReceiverID | Integer | EDI Receiver ID | Conditional - If (EnableEDI = Yes), the EDIReceiverID is mandatory field, otherwise the field can be left blank | Unique Id of the Receiver *This column is contingent on the instance-level setting. |
| 22 | ExcludeFromAutoApproval | Bit | The field will define whether the Funding source entries be excluded from the Auto Approval scheduler | Yes | Enumeration: ● 0 - No ● 1 - Yes |



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|----|-----------------------------------|-----|--|----------|---|
| 23 | AllowOfflineMobileApp | Bit | This field will define whether an employee is allowed to use the application in offline mode or not. | Yes | Enumeration: <ul style="list-style-type: none"> ● 0 - No ● 1 - Yes |
| 24 | RequireReasonCodeForManualEntries | Bit | The field will define whether the Reason Code will be required for Manual entries or not | Yes | Enumeration: <ul style="list-style-type: none"> ● 0 - No ● 1 - Yes |
| 25 | AllowSignatureEVVerification | Bit | This field Checks whether Signature verification method is enabled/ disabled corresponding to the Funding Source | Optional | Enumeration: <ul style="list-style-type: none"> ● 0 - Signature Verification method is disabled ● 1 - Signature Verification method is enabled |
| 26 | AllowClientPasswordEVVerification | Bit | This field Checks whether Password verification method is enabled/ disabled corresponding to the Funding Source | Optional | Enumeration: <ul style="list-style-type: none"> ● 0 - Password Verification method is disabled ● 1 - Password Verification method is enabled |
| 27 | AllowClientPinEVVerification | Bit | This field Checks whether Pin verification method is enabled/ disabled corresponding to the Funding Source | Optional | Enumeration: <ul style="list-style-type: none"> ● 0 - Pin Verification method is disabled ● 1 - Pin Verification method is enabled |

Import Formats – Admin Guide

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|----|------------------------------------|---------|--|----------|--|
| 28 | AllowPictureEVVVerification | Bit | This field Checks whether Picture verification method is enabled/ disabled corresponding to the Funding Source | Optional | Enumeration: <ul style="list-style-type: none"> ● 0 - Picture Verification method is disabled ● 1 - Picture Verification method is enabled |
| 29 | PerformPictureFacialRecognition | Bit | This field Checks whether Facial Recognition is enabled/ disabled corresponding to the Funding Source | Optional | Enumeration: <ul style="list-style-type: none"> ● 0 - Facial recognition is disabled ● 1 - Facial recognition is enabled |
| 30 | PictureFacialMinPercentage | Integer | This field the column stores the Min percentage value for facial recognition | Optional | Allows Integer value FYI: Allows integer value from range 0 - 100 |
| 31 | AllowFOBEVVVerification | Bit | This field Checks whether FOB Verification method is enabled/ disabled corresponding to the Funding Source | Optional | Enumeration: <ul style="list-style-type: none"> ● 0 - FOB Verification method is disabled ● 1 - FOB Verification method is enabled |
| 32 | AllowVoiceRecordingEVVVerification | Bit | This field Checks whether Voice Verification method is enabled/ disabled corresponding to the Funding Source | Optional | Enumeration: <ul style="list-style-type: none"> ● 0 - Voice Verification method is disabled ● 1 - Voice Verification method is enabled |

Import Formats – Admin Guide

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|----|--------------------------------------|-----|--|----------|--|
| 33 | RequireReasonCodeForLateEntries | Bit | This field Checks whether reason code is required for late entries or not | Optional | <p>Enumeration:</p> <ul style="list-style-type: none"> ● 0 - Reason Code is not required for late entries ● 1 - Reason Code is required for late entries |
| 34 | AllowMobilePortalSignOffVerification | Bit | The field will define whether the EVV verification method of Client Sign Off is enabled or not | Optional | <p>Allows 0 or 1 value.</p> <p>0 = Disables Client Sign off Verification method</p> <p>1 = Enables Client Sign off Verification method</p> |
| 35 | AllowApproveUnverifiedPicture | Bit | The field will define whether unverified pictures can be approved or not | Optional | <p>Allows 0 or 1 value.</p> <p>0 = Disables Approve Unverified Picture</p> <p>1 = Enables Approve Unverified Picture</p> |
| 36 | AllowApproveUnverifiedSignature | Bit | The field will define whether unverified signatures can be approved or not | Optional | <p>Allows 0 or 1 value.</p> <p>0 = Disables Approve Unverified signature</p> <p>1 = Enables Approve Unverified signature</p> |
| 37 | AllowApproveUnverifiedVoiceRecording | Bit | The field will define whether unverified recordings can be approved or not | Optional | <p>Allows 0 or 1 value.</p> <p>0 = Disables Approve Unverified recording</p> <p>1 = Enables Approve Unverified recording</p> |

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|----|--------------------------------------|--------|--|---|--|
| 38 | ScheduleCompareLogic | Bit | (Instance Level Setting) Select Default (Visit Start Time is compared to Schedule Start and Visit End Time is compared to Schedule End) or Duration (Visit Duration compared to Schedule Duration) | Yes, if instance level setting is enabled | 0 = Default 1 = Duration |
| 39 | AllowedDeviation | String | (Instance Level Setting) The number of minutes a visit can deviate from the compared schedule entry and still be considered a match | Required if Duration is selected for Schedule Compare Logic | Min = 1 Max = 20 |
| 40 | AutoDownwardBillableAmountAdjustment | Bit | The field checks whether the Billable Amount needs to be adjusted in the entries that are added corresponding to the Funding Sources. | | Allows 0 or 1 value. 0 = Billable Amount will not be adjusted 1 = Billable Amount will be adjusted |
| 41 | ProgramID | String | Optional, free text field on the funding source profile. | Optional | |

Regions

| Field # | Field | Type | Description | Required | Comments |
|---------|-------|------|-------------|----------|----------|
|---------|-------|------|-------------|----------|----------|

Import Formats – Admin Guide

| | | | | | |
|----|-----------------|---------|--|----------|---|
| 1 | ProfileId | Integer | Unique identifier for the Funding Source Profile | Yes | Must use existing Id in DCI |
| 2 | RegionName | String | Name of the Region | Yes | Min Length: 2 Max Length: 50 |
| 3 | Address | String | Address Line 1 | Yes | Min Length: 2 Max Length: 150 |
| 4 | Address2 | String | Address Line 2 | Optional | Min Length: 2 Max Length: 150 |
| 5 | City | String | City | Yes | Min Length: 2 Max Length: 20 |
| 6 | State | String | State | Yes | The state's two letter abbreviation (ie, AZ) |
| 7 | PostalCode | String | Postal Code | Yes | Length = 5 numerals |
| 8 | CountryCode | String | Country Code | Yes | Should be USA |
| 9 | Phone | String | Phone Number | Yes | 10-digit phone number; exclude dashes and parentheses |
| 10 | FaxNumber | String | Fax Phone Number | Optional | 10-digit phone number; exclude dashes and parentheses |
| 11 | Email | String | Email Address | Yes | Email format: test@dcisoftware.com |
| 12 | ContactName | String | Name of the Contact | Yes | Min Length: 1 Max Length: 150 |
| 13 | RegionReference | String | Third-party reference for the Region | Optional | Min Length: 1 Max Length: 150 |

Service Codes

| Field # | Field | Type | Description | Required | Comments |
|---------|-------|------|-------------|----------|----------|
|---------|-------|------|-------------|----------|----------|



Import Formats – Admin Guide

| | | | | | |
|----|------------------------|---------|--|--|--|
| 1 | FundingSourceId | Integer | Unique identifier for the Funding Source Profile | Yes | Must use existing Id in DCI |
| 2 | AccountType | Integer | Account Type for the Service Code | Yes | See “Admin Guide: Static Data Reference File for Imports” in the Help Center |
| 3 | ServiceCodeName | String | Name of the Service Code | Yes | Min Length: 1 Max Length: 200 |
| 4 | FundingType | Integer | (FI Mode Only) Type of Funding Account | Required for Fiscal Intermediary Mode | 1 - Units 2 - Dollar |
| 5 | BillCode | String | Funding Source Code for Billing | Yes | Min Length: 2 Max Length: 20 |
| 6 | BillCodeModifier1 | String | Bill code modifier | Optional | 2 Alpha-numeric characters |
| 7 | BillCodeModifier2 | String | Bill code modifier | Optional | 2 Alpha-numeric characters |
| 8 | BillCodeModifier3 | String | Bill code modifier | Optional | 2 Alpha-numeric characters |
| 9 | BillCodeModifier4 | String | Bill code modifier | Optional | 2 Alpha-numeric characters |
| 10 | Billable | Boolean | Service Code Entries will be Billable | Yes | 0 - False 1 - True |
| 11 | BillingUnit | Integer | The type of Billing Units (Hourly, Daily, etc.) | Yes | See “Admin Guide: Static Data Reference File for Imports” in the Help Center |
| 12 | BillingMultiplier | Integer | Billing Multiplier | Conditional - Required if BillingUnit = Hourly | Should be 1, 2 or 3 (Refer to ImportProfile Static Data File) |
| 13 | DefaultBillingModifier | String | The default Billing Modifier | Optional | Min Length: 1 Max Length: 50 |

Import Formats – Admin Guide

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|----|-------------------|---------|---|---|--|
| 14 | RoundingIncrement | Integer | Rounding Increment | Conditional - Required if Billable = Yes & Billing Unit = Hourly | See “Admin Guide: Static Data Reference File for Imports” in the Help Center |
| 15 | RoundingType | Integer | Type of Rounding applied to Punch Entries | Conditional - Required if RoundingIncrement = 25 / 50 / 100 | See “Admin Guide: Static Data Reference File for Imports” in the Help Center |
| 16 | BillingRollupType | Integer | Billing Rollup Types | Conditional - Required if Billable field = Yes | Should be 1, 2 or 3, 4 (Refer to ImportProfile Static Data File) |
| 17 | PayBackRebill | Boolean | Pay Back Rebill and it should be 0/ 1 | Conditional - Required if Funding Type = Dollar & Account Type = Hourly & Billing Unit = Dollar | 0 - False 1 - True |
| 18 | DefaultPayRate | Decimal | The default Rate for Employee Pay per Unit | Conditional - Required if Account Type = Hourly or Client Transportation & Payable = Yes | Should be less than 999.99 |
| 19 | HasMaxPayRate | Boolean | Pay Rate Max Limit and it should be 0/ 1 | Conditional - Required if Account Type = Hourly OR Client Transportation | 0 - False 1 - True |
| 20 | MaxPayRate | Decimal | Max Pay Rate allowed for Employee Service Account | Conditional - Required if Account Type = Hourly OR Client Transportation & HasMaxPayRate = Yes | Must include 2 digits following the decimal (X.XX) |

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|----|----------------------|---------|--|--|--|
| 21 | ShowRemainingBalance | Boolean | Yes = Show the remaining authorization balance appears in units when an employee creates a punch | Conditional - Required if Account Type = Hourly OR Client Transportation | 0 - No 1 - Yes |
| 22 | ShowMonthlyBalance | Boolean | Yes = Displays the remaining monthly balance as time when employees create a punch in the mobile app | Conditional - Required if Account Type = Hourly | 0 - No 1 - Yes |
| 23 | ShowWeeklyBalance | Boolean | Yes = Displays the remaining weekly balance as time when employees create a punch in the mobile app | Conditional - Required if Account Type = Hourly | 0 - No 1 - Yes |
| 24 | ShowDailyBalance | Boolean | Yes = Displays the remaining daily balance as time when employees create a punch in the mobile app | Conditional - Required if Account Type = Hourly | 0 - No 1 - Yes |
| 25 | AllowDiagnosticCode | Boolean | Diagnostic Code is allowed or is not allowed | Conditional - Required if Account Type = Hourly | 0 - False (won't display the Diagnostic Code field when creating the Punch) 1 - True (will display the Diagnostic Code field when creating the Punch) |

Import Formats – Admin Guide

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|----|---------------------|---------|---|---|-------------------------------|
| 26 | AllowReimbursements | Boolean | <p>(FI Mode Only) Allow Reimbursements or not and it should be 0 / 1 (This row should only be present if dollars based authorizations are enabled for the environment. Remove otherwise.)</p> | <p>Conditional - Required if Account Type = Hourly & Funding Type = Dollar</p> | <p>0 - False 1 - True</p> |
| 27 | AllowVendorPayments | Boolean | <p>(FI Mode Only) Allow Vendor Payments or not and it should be 0 / 1 (This row should only be present if dollars based authorizations are enabled for the environment. Remove otherwise.)</p> | <p>Conditional - Required if Account Type = Hourly or Account Type = Vendor & Funding Type = Dollar</p> | <p>0 - False 1 - True</p> |
| 28 | AllowBonusPayment | Boolean | <p>(FI Mode Only) Allow Bonus Payments or not and it should be 0 / 1 (This row should only be present if dollars based authorizations are enabled for the environment. Remove otherwise.)</p> | <p>Conditional - Required if Account Type = Hourly & Funding Type = Dollar</p> | <p>0 - False 1 - True</p> |

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|----|--------------------------|---------|--|---|--|
| 29 | AllowAccruedTimePayments | Boolean | (Instance Level Setting Only) Allow Accrued Time Payments and it should be 0 / 1 (This row should only be present if dollars based authorizations are enabled for the environment. Remove otherwise.) | Conditional - Required if Account Type = Hourly & Funding Type = Unit | 0 - False 1 - True |
| 30 | AccruedTimePayCode | Integer | (Instance Level Setting Only) Accrued Time Pay Code (This row should only be present if dollars-based authorizations are enabled for the environment. Remove otherwise.) | Conditional - Required if Account Type = Hourly & AllowAccruedTimePayments = Yes | See "Admin Guide: Static Data Reference File for Imports" in the Help Center |
| 31 | EVVRequired | Boolean | EVV Required/Not Required | Conditional - Required when account type = hourly or client transportation | 0 - False 1 - True Defaults to 0 |
| 32 | RequireEVVLocation | Boolean | Require EVV Location/Not require | Conditional - Required if Account Type = Hourly - all other account types column should be left blank | 0 - False 1 - True |
| 33 | Description | String | Description | Optional | Min Length: 1 Max Length: 200 |
| 34 | ServiceCodeReference1 | String | Service Code Reference 1 for additional Data | Optional | Min Length: 1 Max Length: 250 |

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| | | | | | |
|----|-------------------------|--------------|---|--|---|
| 35 | ServiceCodeReference2 | String | Service Code Reference 2 for additional Data | Optional | Min Length: 1 Max Length: 250 |
| 36 | ServiceCodeReference3 | String | Service Code Reference 3 for additional Data | Optional | Min Length: 1 Max Length: 250 |
| 37 | DefaultCPTCode | Alphanumeric | CPT Code | Optional | Length: 5 characters Enter either CPT <i>or</i> HCPCS |
| 38 | DefaultHCPCSCode | Alphanumeric | HCPCS Code | Optional | Length: 5 characters Enter either CPT <i>or</i> HCPCS |
| 39 | CertificationTemplateId | Integer | The unique identifier for the Certification Template | Optional | Must use existing Id in DCI |
| 40 | EVVAggregationRequired | Bit | Checks whether EVV Aggregation is required or not corresponding to the Service Code | | Allows value either 0 or 1. Enumeration: 0 - EVV Aggregation is not required corresponding to the Service Code 1 - EVV Aggregation is required corresponding to the Service Code |
| 41 | IsTravelTime | Bit | Travel Time is allowed or not with respect to Service Code | Optional (By Default value is set to "0") | Allows value either 0 or 1. Enumeration: 0 - Travel Time Entry is not considered with respect to the Service Code 1 - Travel Time Entry is considered with respect to the Service Code |

| | | | | | |
|----|------------------|-----|--|---|--|
| 42 | RequireCareNotes | Bit | Checks whether Care Notes are required or not corresponding to the hourly Service Code | Conditional – Required for Hourly account type when the Care Management module is enabled. For all other account types the column should be left blank. | Allows value either 0 or 1. Enumeration: 0 – No 1 – Yes |
|----|------------------|-----|--|---|--|

Roles

| Field # | Field | Type | Description | Required | Comments |
|---------|--------------|---------|---|----------|--|
| 1 | ProfileId | Integer | The unique identifier for the Profile | Yes | Should be an existing Id of Employee Profile |
| 2 | CostCenterId | Integer | The unique identifier for the Cost Center | Yes | Should be an existing Id of Cost Center |
| 3 | Role | Integer | The Role to be assigned | Yes | See “Admin Guide: Static Data Reference File for Imports” in the Help Center |

Permissions

| Field # | Field | Type | Description | Required | Comments |
|---------|--------------|---------|----------------------|----------|--|
| 1 | EmployeeId | Integer | Valid Employee Id | Yes | Must be an existing Id in DCI |
| 2 | PermissionId | Integer | Valid Permissions Id | Yes | See “Admin Guide: Static Data Reference File for Imports” in the Help Center |

Holiday Schedule

| Field # | Field | Type | Description | Required | Comments |
|---------|-------------|---------|----------------------------------|----------|--------------------------------------|
| 1 | Name | String | Name for Holiday Schedules | Yes | Min Length: 6 Max Length: 150 |
| 2 | Description | String | Description of Holiday Schedules | Yes | Max Length: 200 |
| 3 | StartRange | Integer | Start Year | Yes | Must be a 4 digit value (i.e., 2021) |
| 4 | EndRange | Integer | End Year | Yes | Must be a 4 digit value (i.e., 2021) |

Holidays

| Field # | Field | Type | Description | Required | Comments |
|---------|-------------------|----------|---------------------------|----------|--------------------------------------|
| 1 | HolidayScheduleId | Integer | Valid Holiday Schedule Id | Yes | Must use existing Id in DCI |
| 2 | HolidaysDate | Datetime | Holiday Start Date | Yes | Must follow date format (MM/DD/YYYY) |
| 3 | HolidaysName | String | Name for Holiday | Yes | Min Length = 1 Max Length = 100 |

Profiles

Employee Profiles

| Field # | Field | Type | Description | Required | Comments |
|---------|-------|------|-------------|----------|----------|
|---------|-------|------|-------------|----------|----------|

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| | | | | | |
|----|--------------|---------|---------------------------------------|----------|---|
| 1 | FirstName | String | First Name | Yes | Min Length: 2 Max Length: 50 |
| 2 | LastName | String | Last Name | Yes | Min Length: 2 Max Length: 50 |
| 3 | FullName | String | Full Name | Optional | Min Length: 2 Max Length: 200 |
| 4 | Address | String | Address Line 1 | Yes | Min Length: 2 Max Length: 150 |
| 5 | Address2 | String | Address Line 2 | Optional | Min Length: 2 Max Length: 150 |
| 6 | City | String | City | Yes | Min Length: 2 Max Length: 20 |
| 7 | State | String | State | Yes | The state's two letter abbreviation (i.e., AZ) |
| 8 | PostalCode | String | Postal Code | Yes | Length = 5 numerals |
| 9 | CountryCode | String | 3 Letter Country Code | Yes | Should be USA |
| 10 | Phone | String | Phone Number | Yes | 10-digit phone number; exclude dashes and parentheses |
| 11 | AltPhone | String | Alternate Phone Number | Optional | 10-digit phone number; exclude dashes and parentheses |
| 12 | MobilePhone | String | Mobile Phone Number | Optional | 10-digit phone number; exclude dashes and parentheses |
| 13 | Email | String | Email Address | Yes | Email format: test@dcisoftware.com |
| 14 | TimeZone | String | Time Zone | Yes | Use the correct Time Zone from the "Import Profile Static Data File" in the Help Center |
| 15 | CostCenterId | Integer | Unique Identifier for the Cost Center | Yes | Must use existing Id in DCI |
| 16 | DOB | Date | Date of Birth | Yes | MM/DD/YYYY |



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|----|------------------|---------|--|--|--|
| 17 | Username | String | Username for login *Activation email is not automatically sent to employee after import | Yes | Min Length: 6 characters Max Length: 50 characters |
| 18 | Password | String | Password for login *Requires employee to change password on first log in after import | Yes | Min Length: 10 characters Max Length: 32 characters Must be at least 10 characters, Must contain 1 uppercase letter, lowercase letters, numbers and special characters |
| 19 | ProfileReference | String | Third-party reference number for the Profile | Optional | Min Length: 1 Max Length: 200 |
| 20 | EmployeeType | Integer | Employee Type | Yes | See “Import Profile Static Data File” |
| 21 | EmployeeNumber | String | Third-party Employee Number | Yes | Min Length: 2 Max Length: 20 |
| 22 | SSN | String | Social Security Number *Must be cleartext (not encrypted) | Conditional Optional The field will be Optional when Retain SSN is set to No in instance level setting. If Retain SSN is set to Yes then SSN becomes mandatory. | Min and Max Length: 9 (Numerals) SSN will be conditionally optional when Employee Type is Contractor (5) |
| 23 | ProfessionalID1 | String | Third-party Professional Identifier 1 | Optional | Min Length: 2 Max Length: 20 |



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|----|------------------------|----------|--|--|--|
| 24 | ProfessionalID2 | String | Third-party Professional Identifier 2 | Optional | Min Length: 2 Max Length: 20 |
| 25 | PayrollId | String | Third-party Payroll Identifier | Optional | Min Length: 2 Max Length: 20 |
| 26 | WeeklyHours | Decimal | Weekly Hours available to Work | Yes | Min Length: 2 Max Length: 20 |
| 27 | HolidayScheduleId | Integer | Holiday Schedule Identifier | Yes | Unique existing Id for a particular Holiday Schedule |
| 28 | TemplateId | Integer | Certification Template Id | Optional | Must use existing Id in DCI |
| 29 | DomesticWorker | Boolean | Domestic Worker | Yes | 0 - No 1 - Yes |
| 30 | OneDayRestIn7Exemption | Boolean | OneDayRestIn7 Exemption | Conditional - Required if DomesticWorker = Yes | 0 - No 1 - Yes |
| 31 | PreferredDayOfRest | Integer | Preferred Day Of Rest | Conditional - Required if OneDayRestIn7Exemption = 1 | 0 - Sunday 1 - Monday 2 - Tuesday 3 - Wednesday 4 - Thursday 5 - Friday 6 - Saturday |
| 32 | RetainSSN | Bit | Checks whether the SSN needs to be stored in Encrypted SSN or not. | Yes | Must be 0 or 1 value Value: ● 0 - No ● 1 - Yes |
| 33 | HireDate | DateTime | Hire Date of Employee | No | Should be in format "MM/DD/YYYY" |
| 34 | Pin | nvarchar | Login Pin of the Employee | Yes | Min Length: 4 Max Length: 4 |
| 35 | ProfileStatus | Integer | Status of the Employee *Imported employee profile status is set to Active | Yes | Must be a valid Status: ● 1 - Active ● 2 - Inactive |

| | | | | | |
|----|-------------------|----------|------------------------------------|-----|---|
| 36 | PreferredLanguage | nVarchar | Preferred language for an Employee | Yes | Must be a valid value: <ul style="list-style-type: none"> ● en - English ● es - Spanish ● vi - Vietnamese ● zh - Mandarin ● ru - Russian ● so - Somali ● ar - Arabic |
|----|-------------------|----------|------------------------------------|-----|---|

Client Profiles

| Field # | Field | Type | Description | Required | Comments |
|---------|-------|------|-------------|----------|----------|
|---------|-------|------|-------------|----------|----------|

Import Formats – Admin Guide

| | | | | | |
|----|--------------|---------|---------------------------------------|----------|--|
| 1 | FirstName | String | First Name | Yes | Min Length: 1 Max Length: 50 |
| 2 | LastName | String | Last Name | Yes | Min Length: 1 Max Length: 50 |
| 3 | FullName | String | Full Name | Optional | Min Length: 2 Max Length: 200 |
| 4 | Address | String | Address Line 1 | Yes | Min Length: 2 Max Length: 150 |
| 5 | Address2 | String | Address Line 2 | Optional | Min Length: 2 Max Length: 150 |
| 6 | City | String | City | Yes | Min Length: 2 Max Length: 20 |
| 7 | State | String | State | Yes | The state's two letter abbreviation (i.e., AZ) |
| 8 | PostalCode | String | Postal Code | Yes | Length = 5 numerals |
| 9 | CountryCode | String | 3 Letter Country Code | Yes | Should be USA |
| 10 | Phone | String | Phone Number | Yes | 10-digit phone number; exclude dashes and parentheses |
| 11 | AltPhone | String | Alternate Phone Number | Optional | 10-digit phone number; exclude dashes and parentheses |
| 12 | MobilePhone | String | Cell Phone Number | Optional | 10-digit phone number; exclude dashes and parentheses |
| 13 | Email | String | Email Address | Yes | Email format: test@dcisoftware.com |
| 14 | TimeZone | String | Time Zone | Yes | See “Admin Guide: Static Data Reference File for Imports” in the Help Center |
| 15 | CostCenterId | Integer | Unique Identifier for the Cost Center | Yes | Use the existing Cost Center Id from DCI |



Import Formats – Admin Guide

| | | | | | |
|----|------------------|---------|--|----------|---|
| 16 | DOB | Date | Date of Birth | Yes | Format: MM/DD/YYYY |
| 17 | Username | String | Username for login | Optional | Min Length: 6 characters Max Length: 50 characters |
| 18 | Password | String | Password for login | Optional | Min Length: 10 characters Max: 32 characters |
| 19 | ProfileReference | String | Third-party reference number for the Profile | Optional | Min Length: 1 Max Length: 200 |
| 20 | ClientNumber | Integer | Third-party Client Number | Yes | Min Length: 1 Max Length: 20 |
| 21 | MedicaidNumber | String | Medicaid Number | Optional | Min Length: 2 Max Length: 20 |
| 22 | InsuranceNumber | String | Third-party Insurance Number | Optional | Min Length: 2 Max Length: 20 |
| 23 | InsurancePlan | String | Insurance Company Plan | Optional | Min Length: 2 Max Length: 20 |
| 24 | InsuranceGroup | String | Insurance Company Group | Optional | Min Length: 2 Max Length: 20 |
| 25 | InsurancePayerId | String | Insurance Company Payer Number | Optional | Min Length: 2 Max Length: 20 |
| 26 | ClientCode | String | Third-party code for the Client | Optional | Min Length: 2 Max Length: 20 |
| 27 | RegionId | String | Third-party Region Name | Optional | Min Length: 2 Max Length: 25 |
| 28 | SSN | String | Social Security Number *Must be cleartext (not encrypted) | Optional | Min and Max Length: 9 (Numerals) |
| 29 | TemplateId | Integer | Existing Certification Template Id from DCI | Optional | Must use existing Id in DCI |

Import Formats – Admin Guide

| | | | | | |
|----|-----------------------------|---------|--|----------|--|
| 30 | Fee | Decimal | Fee Amount | Optional | Min Length: 1 Max Length: 18 (After Decimal: 2) |
| 31 | CostShare | Decimal | Cost Share | Optional | Min Length: 1 Max Length: 18 (After Decimal: 2) |
| 32 | EnableCaregiverRatingEmails | Int | Allows clients to rate the caregiver for services they've received | Yes | Must be 0 or 1 value Value: ● 0 - No 1 - Yes |
| 33 | ReceivedDate | Date | Received Date | Optional | ● Format: MM/DD/YYYY Y |
| 34 | RetainSSN | Bit | Checks SSN needs to store in encrypted form or not | No | Must be 0 or 1 value Value: ● 0 - No 1 - Yes |
| 35 | Pin | Varchar | Login Pin of the Client | Yes | ● Min/Max Length: 4 |
| 36 | ProfileStatus | Integer | Status of the Client Profile *Imported client profile status is set to Active | Yes | Must be a valid Status: ● 1 - Active 2 - Inactive |
| 37 | PreferredLanguage | Varchar | Preferred language for a Client | Yes | Must be a valid value: ● en - English ● es - Spanish ● vi- Vietnamese ● zh - Mandarin ● ru - Russian ● so - Somali ● ar - Arabic |

Guardian Profiles

| Field # | Field | Type | Description | Required | Comments |
|---------|-----------|--------|-------------|----------|---------------------------------|
| 1 | FirstName | String | First Name | Yes | Min Length: 2 Max Length: 50 |
| 2 | LastName | String | Last Name | Yes | Min Length: 2 Max Length: 50 |



Import Formats – Admin Guide

| | | | | | |
|----|--------------|---------|---------------------------------------|----------|--|
| 3 | Address | String | Address Line 1 | Yes | Min Length: 2 Max Length: 150 |
| 4 | Address2 | String | Address Line 2 | Optional | Min Length: 2 Max Length: 150 |
| 5 | City | String | City | Yes | Min Length: 2 Max Length: 20 |
| 6 | State | String | State | Yes | State abbreviation of 2 characters i.e., Min Length and Max Length: 2 |
| 7 | PostalCode | String | Postal Code | Yes | Length = 5 numerals |
| 8 | CountryCode | String | 3 Letter Country Code | Yes | Should be USA |
| 9 | Phone | String | Phone Number | Yes | 10-digit phone number; exclude dashes and parentheses |
| 10 | AltPhone | String | Alternate Phone Number | Optional | 10-digit phone number; exclude dashes and parentheses |
| 11 | MobilePhone | String | Mobile Number | Optional | 10-digit phone number; exclude dashes and parentheses |
| 12 | Email | String | Email Address | Yes | Email format: test@dcisoftware.com |
| 13 | TimeZone | String | Time Zone | Yes | See “Admin Guide: Static Data Reference File for Imports” in the Help Center |
| 14 | CostCenterId | Integer | Unique identifier for the Cost Center | Yes | Must use existing Id in DCI |
| 15 | Username | String | Username for Login | Optional | Min Length: 6 characters Max Length: 20 characters |

| | | | | | |
|----|------------------|--------|--|----------|--|
| 16 | Password | String | Password for Login | Optional | Min Length: 10 characters Max Length: 32 characters |
| 17 | ProfileReference | String | Third-party reference number for the Profile | Optional | Min Length: 1 Max Length: 200 |

Link Client to Guardian

| Field # | Field | Type | Description | Required | Comments |
|---------|------------|---------|--|----------|-----------------------------|
| 1 | ClientId | Integer | Client Id Unique Id of Client with whom the Guardian Profile needs to be linked | Yes | Must use existing Id in DCI |
| 2 | GuardianId | Integer | Guardian Id | Yes | Must use existing Id in DCI |

Day Program Profiles

| Field # | Field | Type | Description | Required | Comments |
|---------|-------|------|-------------|----------|----------|
|---------|-------|------|-------------|----------|----------|

Import Formats – Admin Guide

| | | | | | |
|----|--------------|---------|---------------------------------------|----------|--|
| 1 | FirstName | String | First Name | Optional | Min Length: 2 Max Length: 50 |
| 2 | LastName | String | Last Name | Optional | Min Length: 2 Max Length: 50 |
| 3 | FullName | String | Full Name | Yes | Min Length: 2 Max Length: 200 |
| 4 | Address | String | Address Line 1 | Yes | Min Length: 2 Max Length: 150 |
| 5 | Address2 | String | Address Line 2 | Optional | Min Length: 2 Max Length: 150 |
| 6 | City | String | City | Yes | Min Length: 2 Max Length: 20 |
| 7 | State | String | State | Yes | State abbreviation of 2 characters i.e., AZ |
| 8 | PostalCode | String | Postal Code | Yes | Length = 5 numerals |
| 9 | CountryCode | String | Country Code | Yes | Should be USA |
| 10 | Phone | String | Phone Number | Yes | 10-digit phone number; exclude dashes and parentheses |
| 11 | AltPhone | String | Alternate Phone Number | Optional | 10-digit phone number; exclude dashes and parentheses |
| 12 | Email | String | Email Address | Yes | Email format: test@dcisoftware.com |
| 13 | TimeZone | String | Time Zone | Yes | See “Admin Guide: Static Data Reference File for Imports” in the Help Center |
| 14 | CostCenterId | Integer | Unique identifier for the Cost Center | Yes | Must use existing Id in DCI |
| 15 | Username | String | Username for login | Yes | Min Length: 6 characters Max Length: 50 characters |

| | | | | | |
|----|-------------------------|---------|--|----------|--|
| 16 | Password | String | Password for login | Yes | Min Length: 10 characters Max Length: 32 characters |
| 17 | ProfileReference | String | Third-party reference number for the Profile | Optional | Min Length: 1 Max Length: 200 |
| 18 | ProviderServiceLocation | String | The location used for Billing Purposes | Optional | Min Length: 1 Max Length: 200 |
| 19 | EVVRequired | Boolean | EVV Required | Yes | 0 - False 1 - True |

Residential Program Profiles

| Field # | Field | Type | Description | Required | Comments |
|---------|-------|------|-------------|----------|----------|
|---------|-------|------|-------------|----------|----------|

Import Formats – Admin Guide

| | | | | | |
|----|--------------|---------|---------------------------------------|----------|---|
| 1 | FirstName | String | First Name | Optional | Min Length: 2 Max Length: 50 |
| 2 | LastName | String | Last Name | Optional | Min Length: 2 Max Length: 50 |
| 3 | FullName | String | Full Name | Yes | Min Length: 2 Max Length: 200 |
| 4 | Address | String | Address Line 1 | Yes | Min Length: 2 Max Length: 150 |
| 5 | Address2 | String | Address Line 2 | Optional | Min Length: 2 Max Length: 150 |
| 6 | City | String | City | Yes | Min Length: 2 Max Length: 20 |
| 7 | State | String | State | Yes | State abbreviation of 2 characters i.e., Min Length and Max Length: 2 |
| 8 | PostalCode | String | Postal Code | Yes | Length = 5 numerals |
| 9 | CountryCode | String | 3 Letter Country Code | Yes | Should be USA |
| 10 | Phone | String | Phone Number | Yes | 10-digit phone number; exclude dashes and parentheses |
| 11 | AltPhone | String | Alternate Phone Number | Optional | 10-digit phone number; exclude dashes and parentheses |
| 12 | Email | String | Email Address | Yes | Email format: test@dcisoftware.com |
| 13 | TimeZone | String | Time Zone | Yes | Use the correct Time Zone from the “Import Profile Static Data File” in the Help Center |
| 14 | CostCenterId | Integer | Unique identifier for the Cost Center | Yes | Must use existing Id in DCI |

Import Formats – Admin Guide

| | | | | | |
|----|-------------------------|---------|--|---|--|
| 15 | Username | String | Username for login | Yes | Min Length: 6 characters Max Length: 50 characters |
| 16 | Password | String | Password for login | Yes | Min Length: 10 characters Max Length: 32 characters |
| 17 | ProfileReference | String | Third-party reference number for the Profile | Optional | Min Length: 1 Max Length: 200 |
| 18 | AllowSleepShift | Boolean | Is sleep shift allowed or not? | Yes | 0 - False 1 - True |
| 19 | SleepShiftStart | Time | Start of the Sleep Shift | Conditional - Required if AllowSleepShift = 1 | Time must be in 24 hr (HH:MM) format |
| 20 | SleepShiftEnd | Time | End of the Sleep Shift | Conditional - Required if AllowSleepShift = 1 | Time must be in 24 hr (HH:MM) format |
| 21 | ProviderServiceLocation | String | Location used for Billing purposes | Optional | Min Length: 1 Max Length: 200 |
| 22 | EVVRequired | Boolean | EVV Required | Yes | 0 - False 1 - True |

Case Workers

| Field # | Field | Type | Description | Required | Comments |
|---------|-------|------|-------------|----------|----------|
|---------|-------|------|-------------|----------|----------|

Import Formats – Admin Guide

| | | | | | |
|----|-------------|--------|---------------------------|----------|--|
| 1 | FirstName | String | First Name | Yes | Min Length: 2 Max Length: 50 |
| 2 | LastName | String | Last Name | Yes | Min Length: 2 Max Length: 50 |
| 3 | FullName | String | Full Name | Optional | Min Length: 2 Max Length: 200 |
| 4 | UserName | String | Username for login | Optional | Min Length: 6 characters Max Length: 20 characters |
| 5 | Password | String | Password for login | Optional | Min Length: 10 characters Max Length: 32 characters |
| 6 | Address | String | Address Line 1 | Yes | Min Length: 2 Max Length: 150 |
| 7 | Address2 | String | Address Line 2 | Optional | Min Length: 2 Max Length: 150 |
| 8 | City | String | City | Yes | Min Length: 2 Max Length: 20 |
| 9 | State | String | State | Yes | State abbreviation of 2 characters i.e., AZ |
| 10 | PostalCode | String | Postal Code | Yes | Length = 5 numerals |
| 11 | CountryCode | String | 3 Letter Country Code | Yes | Should be USA |
| 12 | Phone | String | Phone Number | Yes | 10-digit phone number; exclude dashes and parentheses |
| 13 | AltPhone | String | Alternate Phone Number | Optional | 10-digit phone number; exclude dashes and parentheses |
| 14 | MobilePhone | String | Mobile Phone Number | Optional | 10-digit phone number; exclude dashes and parentheses |



Import Formats – Admin Guide

| | | | | | |
|----|--------------------|---------|---|--|---|
| 15 | TimeZone | String | Time Zone | Yes | See “Admin Guide: Static Data Reference File for Imports” in the Help Center |
| 16 | Email | String | Email Address | Yes | Email format: test@dcisoftware.com |
| 17 | CostCenterId | Integer | Unique identifier for the Cost Center | Yes | Must use existing Id in DCI |
| 18 | ProfileReference | String | Third-party reference number for the Profile | Optional | Min Length: 1 Max Length: 200 |
| 19 | CanViewNotes | Bit | Allows case worker to view Notes on the Client Details and Punch Details Page | Optional (Default value is set to “0”) | Allows value either 0 or 1. Enumeration: 0 - Case Worker is not allowed to view Notes on Client Details and Punch Details Page 1 - Case Worker is allowed to view Notes on Client Details and Punch Details Page |
| 20 | CanViewAttachments | Bit | Allows case worker to view Attachments on the Client Details and Punch Details Page | Optional (Default value is set to “0”) | Allows value either 0 or 1. Enumeration: 0 - Case Worker is not allowed to view Attachments on Client Details and Punch Details Page 1 - Case Worker is allowed to view Attachments on Client Details and Punch Details Page |

Vendor Profiles (FI Mode Only)



Import Formats – Admin Guide

| Field # | Field | Type | Description | Required | Comments |
|---------|------------------|---------|--|----------|---|
| 1 | FullName | String | Full Name | Yes | Min Length: 2 Max Length: 200 |
| 2 | DBA | String | DBA Name | No | Min. Length: 2 Max Length: 60 |
| 3 | Address | String | Address Line 1 | Yes | Min Length: 2 Max Length: 150 |
| 4 | Address2 | String | Address Line 2 | Optional | Min Length: 2 Max Length: 150 |
| 5 | City | String | City | Yes | Min Length: 2 Max Length: 20 |
| 6 | State | String | State | Yes | The state's two letter abbreviation (i.e., AZ) |
| 7 | PostalCode | String | Postal Code | Yes | Length = 5 numerals |
| 8 | CountryCode | String | 3 Letter Country Code | Yes | Should be USA |
| 9 | Phone | String | Phone Number | Yes | 10-digit phone number; exclude dashes and parentheses |
| 10 | AltPhone | String | Alternate Phone Number | Optional | 10-digit phone number; exclude dashes and parentheses |
| 11 | Email | String | Email Address | Yes | Email format: test@dcisoftware.com |
| 12 | TimeZone | String | Time Zone | Yes | Use the correct Time Zone from the "Import Profile Static Data File" in the Help Center |
| 13 | CostCenterId | Integer | The unique identifier for the Cost Center | Yes | Must use existing Id in DCI |
| 14 | ProfileReference | String | Third-party reference number for the Profile | Optional | Min Length: 1 Max Length: 200 |
| 15 | TaxId | String | Tax Id of the Vendor | Yes | Should be of 9 Numerals (xx-xxxxxxx) |

| | | | | | |
|----|-----|--------|--------------------------------------|----------|---------------------------------|
| 16 | URL | String | The unique Web Address of the Vendor | Optional | Min Length: 2 Max Length: 30 |
|----|-----|--------|--------------------------------------|----------|---------------------------------|

Group Service Profiles

| Field # | Field | Type | Description | Required | Comments |
|---------|--------------|---------|---------------------------------------|----------|--|
| 1 | Name | String | Name | Yes | Min Length: 6 Max Length: 200 |
| 2 | Address | String | Address Line 1 | Yes | Min Length: 2 Max Length: 150 |
| 3 | Address2 | String | Address Line 2 | Optional | Min Length: 2 Max Length: 150 |
| 4 | City | String | City | Yes | Min Length: 2 Max Length: 20 |
| 5 | State | String | State | Yes | State abbreviation of 2 characters i.e., Min Length and Max Length: 2 |
| 6 | PostalCode | String | Postal Code | Yes | Length = 5 numerals |
| 7 | CountryCode | String | 3 Letter Country Code | Yes | Should be USA |
| 8 | TimeZone | String | Time Zone | Yes | See “Admin Guide: Static Data Reference File for Imports” in the Help Center |
| 9 | Phone | String | Phone Number | Yes | 10-digit phone number; exclude dashes and parentheses |
| 10 | AltPhone | String | Alternate Phone Number | Optional | 10-digit phone number; exclude dashes and parentheses |
| 11 | Email | String | Email Address | Yes | Email format: test@dcisoftware.com |
| 12 | CostCenterId | Integer | Unique identifier for the Cost Center | Yes | Must use existing Id in DCI |

| | | | | | |
|----|--------------------------------|---------|--|--|---|
| 13 | ProfileReference | String | Third-party reference number for the Profile | Optional | Max Length: 200 |
| 14 | EVVRequired | Boolean | EVV Required | Yes | 0 - False 1 - True |
| 15 | EnableGeofencing | Boolean | Enable Geofencing | Conditional - Required if EVVRequired = 1 True | 0 - False 1 - True |
| 16 | RequiresMultipleClientPerPunch | Boolean | Requires Multiple Client Per Punch | Yes | 0 - False 1 - True |
| 17 | MinimumNumberOfAttendees | Integer | Value of the minimum number of Attendees should be defined | Required | The column is selectively mandatory when RequiresMultipleClientPerPunch=1 |

Update Employee Profile

- The employee profile status must be in **active** status to use this import (not suspended, terminated, extended leave, or inactive status)

| Field # | Field | Type | Description | Required | Comments |
|---------|------------|---------|-------------------|----------|--|
| 1 | ProfileId | Integer | Unique profile Id | Yes | Must be the existing employee profile Id |
| 2 | FirstName | String | First Name | Yes | Min Length: 2 Max Length: 50 |
| 3 | LastName | String | Last Name | Yes | Min Length: 2 Max Length: 50 |
| 4 | FullName | String | Full Name | Optional | Min Length: 2 Max Length: 200 |
| 5 | Address | String | Address Line 1 | Yes | Min Length: 2 Max Length: 150 |
| 6 | Address2 | String | Address Line 2 | Optional | Min Length: 2 Max Length: 150 |
| 7 | City | String | City | Yes | Min Length: 2 Max Length: 20 |
| 8 | State | String | State | Yes | The state's two letter abbreviation (i.e., AZ) |
| 9 | PostalCode | String | Postal Code | Yes | Length = 5 numerals |

Import Formats – Admin Guide

| | | | | | |
|----|------------------|---------|--|----------|---|
| 10 | Phone | String | Phone Number | Yes | 10-digit phone number; exclude dashes and parentheses |
| 11 | AltPhone | String | Alternate Phone Number | Optional | 10-digit phone number; exclude dashes and parentheses |
| 12 | MobilePhone | String | Cell Phone Number | Optional | 10-digit phone number; exclude dashes and parentheses |
| 13 | Email | String | Email Address | Yes | Email format: test@dcisoftware.com |
| 14 | TimeZone | String | Time Zone | Yes | See “Imports – Static Data Reference File – Admin Guide” in the Help Center |
| 15 | CostCenterId | Integer | Unique cost center Id | Yes | Must be the existing cost center Id |
| 16 | DOB | Date | Date of Birth | Yes | Format: MM/DD/YYYY |
| 17 | ProfileReference | String | Third-party reference number for the profile | Optional | Min Length: 1 Max Length: 200 |
| 18 | EmployeeType | Integer | Employee Type | Yes | See “Imports – Static Data Reference File – Admin Guide” in the Help Center: Hourly Non-Exempt: 2 Salary Exempt: 3 Salary Non-Exempt: 4 Contractor: 5 |
| 19 | EmployeeNumber | String | Third-party employee number | Yes | Min Length: 2 Max Length: 20 |
| 20 | SSN | String | Social Security Number | Yes | Min and Max Length: 9 (Numerals) Full non-encrypted social security number |
| 21 | ProfessionalId1 | String | Third-party professional identifier | Optional | Min Length: 2 Max Length: 20 |
| 22 | ProfessionalId2 | String | Third-party professional identifier | Optional | Min Length: 2 Max Length: 20 |

| | | | | | |
|----|------------------------|----------|---|---|--|
| 23 | PayrollId | String | Third-party payroll identifier | Optional | Min Length: 2 Max Length: 20 |
| 24 | WeeklyHours | Decimal | Weekly Hours available to work | Yes | Min Length: 2 Max Length: 20 |
| 25 | HolidayScheduleId | Integer | Holiday Schedule identifier | Yes | Must be the existing holiday schedule Id |
| 26 | TemplateId | Integer | Certification Template Id | Optional | Must be the existing certification template Id |
| 27 | DomesticWorker | Boolean | Domestic Worker | Yes | 0 – No 1 - Yes |
| 28 | OneDayRestIn7Exemption | Boolean | One Day of Rest in 7 Exemption | Conditional – Required if DomesticWorker = 1 (Yes) | 0 – No 1 - Yes |
| 29 | PreferredDayOfRest | Integer | Preferred Day Of Rest | Conditional – Required if OneDayRestIn7Exemption = 1 (Yes) | 0 – Sunday 1 – Monday 2 – Tuesday 3 – Wednesday 4 – Thursday 5 – Friday 6 – Saturday |
| 30 | RetainSSN | Bit | Checks whether the SSN needs to be stored in Encrypted SSN or not | No | 0 – No 1 - Yes |
| 31 | HireDate | Date | Hire Date of Employee | No | Format: MM/DD/YYYY |
| 32 | Pin | Nvarchar | Login Pin of the Employee | Yes | Min/Max Length: 4 |
| 33 | ProfileStatus | Integer | Status of the Employee | Yes | 1 – Active 2 - Inactive |

Update Employee Profile Element

| Field # | Field | Type | Description | Required | Comments |
|---------|-----------|---------|--------------------------|----------|---|
| 1 | ProfileId | Integer | Unique Id of the Profile | Yes | Should be the existing Id of the Employee Profile |

| | | | | | |
|---|-----------------|--------|---|-----|--|
| 2 | DataElementName | String | Name of the columns <ul style="list-style-type: none"> - SSN - EmployeeNumber - RetainSSN - ProfileReference - AuthenticationStatus | Yes | Columns: SSN Should be of 9 Numerals EmployeeNumber Min Length - 2 Max Length - 20 ProfileReference Min Length - 2 Max Length - 200 RetainSSN Must have value 0 or 1 Value: <ul style="list-style-type: none"> ● 0 - No ● 1 - Yes AuthenticationStatus Should be the existing Authentication status Id: <ul style="list-style-type: none"> ● 1 - Active ● 2 - Disabled ● 3 - Locked |
| 3 | NewDataValue | String | Data | No | Data corresponding to the column <ul style="list-style-type: none"> - SSN - EmployeeNumber - RetainSSN - ProfileReference - AuthenticationStatus |

Update Client Profile Element

| Field # | Field | Type | Description | Required | Comments |
|---------|-----------------|---------|---|----------|--|
| 1 | ProfileId | Integer | Unique Id of the Profile | Yes | Should be the existing Id of the Client Profile |
| 2 | DataElementName | String | Name of the columns <ul style="list-style-type: none"> - SSN - ClientNumber - RetainSSN | Yes | Columns: SSN Should be 9 Numerals |

| | | | | | |
|--|--|--|--|--|--|
| | | | <ul style="list-style-type: none"> - ProfileReference - AuthenticationStatus - EnableCareGiverRatingEmails - EnableCareManagement - EnableVendorPayments - EnableEmployerReimbursement | | <p>ClientNumber Min Length: 1 Max Length: 20</p> <p>RetainSSN Must have value (0 or 1) Value: <ul style="list-style-type: none"> ● 0 - No ● 1 - Yes </p> <p>ProfileReference Min Length: 1 Max Length: 200</p> <p>AuthenticationStatus Must be an existing Id of the Authentication: <ul style="list-style-type: none"> ● 1 - Active ● 2 - Disabled ● 3 - Locked </p> <p>EnableCareGiverRatingEmails Must have value (0 or 1) Value: <ul style="list-style-type: none"> ● 0 - No ● 1 - Yes </p> <p>EnableCareManagement Must have value (0 or 1) Value: <ul style="list-style-type: none"> ● 0 - No ● 1 - Yes </p> <p>EnableVendorPayments Must have value (0 or 1) Value: <ul style="list-style-type: none"> ● 0 - No ● 1 - Yes </p> <p>EnableEmployerReimbursement Must have value (0 or 1) Value: <ul style="list-style-type: none"> ● 0 - No ● 1 - Yes </p> |
|--|--|--|--|--|--|

| | | | | | |
|---|--------------|--------|------|----|--|
| 3 | NewDataValue | String | Data | No | Data corresponding to the columns: <ul style="list-style-type: none"> - SSN - ClientNumber - RetainSSN - ProfileReference - Authentication Status - EnableCareGiverRatingEmails - EnableCareManagement - EnableVendor Payments - EnableEmployerReimbursement |
|---|--------------|--------|------|----|--|

Accounts

Client Funding Accounts

| Field # | Field | Type | Description | Required | Comments |
|---------|-------|------|-------------|----------|----------|
|---------|-------|------|-------------|----------|----------|

Import Formats – Admin Guide

| | | | | | |
|---|------------------|----------|--|---|--|
| 1 | ProfileId | Integer | Unique identifier for the Client Profile | Yes | Must use existing Id in DCI |
| 2 | ServiceCodeId | Integer | Unique identifier for the Service Code. Can be found on Service Codes Report, in the column Service Code ID. | Yes | Must use existing Id in DCI |
| 3 | CostCenterId | Integer | Unique identifier for the Cost Center | Yes | Must use existing Id in DCI |
| 4 | AccountReference | String | The third-party reference for the Account | Optional | Min Length: 2 Max Length: 150 |
| 5 | UnitId | Integer | Unique identifier for the Units for the Account Should match the Billing Unit provided in corresponding Service Code. | Yes | See “Admin Guide: Static Data Reference File for Imports” in the Help Center |
| 6 | AccountCodeRef | String | Third-party code for the Account | Optional | Min Length: 1 Max Length: 255 |
| 7 | MinEntryAmount | Decimal | Minimum Entry Amount and it can be 0, which indicates unused | Optional | Should be Less than 999.99 |
| 8 | MaxEntryAmount | Decimal | Maximum Entry Amount and it can be 0, which indicates unused | Optional | Should be Less than 999.99 |
| 9 | StartDate | DateTime | Start Date of the Account | Conditional - Required for Residential Program Accounts | Format: MM/DD/YYYY |

Import Formats – Admin Guide

| | | | | | |
|----|--------------|----------|----------------------------------|---|---|
| 10 | EndDate | DateTime | End Date of the Account | Conditional - Required for Residential Program Accounts and should be blank for other Types | Format: MM/DD/YYYY |
| 11 | StaffRatio | Integer | Client Staff Ratio | Conditional - Required for Day Program Accounts and should be blank for other Types of Account | Min Length: 1 Max Length: 5 |
| 12 | RegionId | Integer | Unique Identifier for Region | Conditional - Required only if Region Exists for corresponding to Funding Source, otherwise can be left blank | Must use existing Id in DCI |
| 13 | CaseWorkerId | Integer | Unique Identifier for Caseworker | Optional | Caseworker Id representing Funding Source |

Client Service Accounts

| Field # | Field | Type | Description | Required | Comments |
|---------|-----------------|---------|--|----------|-----------------------------|
| 1 | ProfileId | Integer | Unique identifier for the Program Profile | Yes | Must use existing Id in DCI |
| 2 | ParentAccountId | Integer | Client Funding Account Id. Can be found on Funding Account Report, in the column Account ID. | Yes | Must use existing Id in DCI |



Import Formats – Admin Guide

| | | | | | |
|---|------------------|----------|---|---|--|
| 3 | AccountReference | String | The third-party reference for the Account | Optional | Min Length: 2 Max Length: 150 |
| 4 | Rate | Decimal | Rate for the Account | Yes | Should be less than 999.99 |
| 5 | AccountType | Integer | Account Type for Client Service Account | Yes | 3 - Day Program 2 - Residential 4 - Group Service 13 - Parenting 14 - Transportation |
| 6 | StartDate | DateTime | Start Date for Account | Conditional - Required only for Residential Program and Parenting Program | Format: MM/DD/YYYY |
| 7 | EndDate | DateTime | End Date for Account | Conditional - Required only for Residential Program and Parenting Program | Format: MM/DD/YYYY |

Employee Service Accounts

| Field # | Field | Type | Description | Required | Comments |
|---------|-------|------|-------------|----------|----------|
|---------|-------|------|-------------|----------|----------|

Import Formats – Admin Guide

| | | | | | |
|----|------------------|---------|--|----------|--|
| 1 | ProfileId | Integer | Unique identifier for the Employee Profile | Yes | Must use existing Id in DCI |
| 2 | ParentAccountId | Integer | Unique identifier for the Client Funding Account 'or' the Master Program Account (Day, Residential, etc.) to be associated with the Employee Service Account | Yes | Should be an existing Id of Client Funding Account for hourly and client transportation or Master Program Account for programs |
| 3 | CostCenterId | Integer | Unique identifier for the Cost Center | Yes | Should be an existing Id of Cost Center |
| 4 | AccountReference | String | The third-party reference for the Account | Optional | Min Length: 2 Max Length: 150 |
| 5 | Rate | Decimal | Rate for the Account | Yes | Should be less than 999.99 |
| 6 | AccountCodeRef | String | Third-party Code for the Account | Optional | Min Length: 2 Max Length: 255 |
| 7 | MinEntryAmount | Decimal | Minimum Entry Amount | Optional | Should be less than 999.99 |
| 8 | MaxEntryAmount | Decimal | Maximum Entry Amount | Optional | Should be less than 999.99 |
| 9 | AccountType | Integer | The Type of Account | Yes | See "Admin Guide: Static Data Reference File for Imports" in the Help Center |
| 10 | StartDate | Date | Start Date of Employee Service Account | Optional | Format: MM/DD/YYYY |
| 11 | EndDate | Date | End Date of Employee Service account | Optional | Format: MM/DD/YYYY |

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|----|-------------------------|---------|---|--|--|
| 12 | EvvFrequencyInterval | Integer | EVV Frequency Interval | Conditional: Required if EVVFrequencyType = ClockIn, out and Define Intervals during shift | Value should be between 1 and 240 |
| 13 | EvvFrequencyType | Integer | EVV Frequency Type | Conditional The field is mandatory if EVV Required is "Yes" in Service Code, otherwise the field can be left blank | See "Admin Guide: Static Data Reference File for Imports" in the Help Center This will be used only for Hourly Account Type |
| 14 | PTOIncrement | Decimal | Increment in which entries for PTO service accounts should be created (e.g. "8" would mean one PTO entry = 8 hours) | No | Value should be between 0.25 and 23.98 and only for PTO Account Type |
| 15 | AllowsOverlapping Rates | Boolean | The field checks whether the user is allowed to create multiple Pay Rates for a Date of Service or not | Yes | 0 - False 1 - True |
| 16 | PayRate | Numeric | Item Id of the Pay Rate name | Yes | Found in Settings > Custom Drop Down |
| 17 | BurdenMultiplier | Decimal | Burden Multiplier (FI Mode Only) | Yes | FI Mode Only. This column should only be present when dollars-based authorizations are enabled. |
| 18 | RelationshipType | Integer | Type of the Relationship | Yes | See "Admin Guide: Static Data Reference File for Imports" in the Help Center |

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| | | | | | |
|----|-------------------|---------|--|--|---|
| 19 | EmployeeNumber | String | Employee Number (FI Mode Only) | No | FI Mode Only Min length: 2 Max length: 20 Number should be alpha-numeric. |
| 20 | Payability | Boolean | Payability and it will be either 1 or 5 | Conditional - Required if Account Type = Mileage | 1 - Non Payable 5 - Payable |
| 21 | EVVExempt | Bit | This field Checks whether EVV Exempt is enabled/ disabled in service account | Optional | Allows value either 0 or 1. ● 0= EVV Exempt is disabled ● 1 = EVV Exempt is enabled |
| 22 | DisplayAuthWidget | Boolean | Enabling will display the authorizations widget on the employees dashboard, available for hourly and client transportation | Conditional - Required if Account Type = Hourly, Client Transportation | Enable Display Auth Widget Must have value (0 or 1) Value: ● 0 - No ● 1 - Yes |

Employee Service Account - Burden Multiplier (FI Mode Only)

| Field # | Field | Type | Description | Comments |
|---------|----------------------|---------|--|-----------------------------|
| 1 | AccountId | Integer | Valid account Id (required) | Must use existing Id in DCI |
| 2 | BurdenMultiplierRate | Bit | The percentage of the rate that accounts for all associated fees (required) | i.e., 0.2 |

Employee Service Accounts – Pay Rate

| Field # | Field | Type | Description | Required | Comments |
|---------|-------|------|-------------|----------|----------|
|---------|-------|------|-------------|----------|----------|



| | | | | | |
|---|---------------|---------|--|----------|--------------------------------------|
| 1 | PayRate | Integer | Item Id of the Pay Rate name | Yes | Found in Settings > Custom Drop Down |
| 2 | AccountId | Integer | Employee Service Account Unique Id | Yes | Must use existing Id in DCI. |
| 3 | Rate | Decimal | New rate value | Yes | Format x.xx |
| 4 | EffectiveDate | Date | Pay Rate Start Date | Yes | Format “MM/DD/YYYY” |
| 5 | EndDate | Date | Pay Rate End Date | Optional | Format “MM/DD/YYYY” |
| 6 | Primary | Boolean | The checkbox provides the ability to mark Pay Rates as Primary | Required | 0 - False 1 - True |

Employee Service Account - Day of Week Restrictions (Instance Level Setting)

| Field # | Field | Type | Description | Mandatory | Comments |
|---------|--------------------------|---------|--|-----------|--|
| 1 | AccountId | Integer | Valid / existing Employee Service Account ID (Account Type = Hourly) | Yes | Valid / existing Employee Service Account ID (Account Type = Hourly) |
| 2 | MondayRestrictEnabled | Bit | Whether Day of Week Restriction needs to be enabled for Monday or not | Yes | Enumeration: ● 0 - FALSE (Unchecked) ● 1 - TRUE (Checked) |
| 3 | TuesdayRestrictEnabled | Bit | Whether Day of Week Restriction needs to be enabled for Tuesday or not | Yes | Enumeration: ● 0 - FALSE (Unchecked) ● 1 - TRUE (Checked) |
| 4 | WednesdayRestrictEnabled | Bit | Whether Day of Week Restriction needs to be enabled for Wednesday or not | Yes | Enumeration: ● 0 - FALSE (Unchecked) ● 1 - TRUE (Checked) |
| 5 | ThursdayRestrictEnabled | Bit | Whether Day of Week Restriction needs to be enabled for Thursday or not | Yes | Enumeration: ● 0 - FALSE (Unchecked) ● 1 - TRUE (Checked) |



| | | | | | |
|---|-------------------------|-----|---|-----|---|
| 6 | FridayRestrictEnabled | Bit | Whether Day of Week Restriction needs to be enabled for Friday or not | Yes | Enumeration: <ul style="list-style-type: none"> ● 0 - FALSE (Unchecked) ● 1 - TRUE (Checked) |
| 7 | SaturdayRestrictEnabled | Bit | Whether Day of Week Restriction needs to be enabled for Saturday or not | Yes | Enumeration: <ul style="list-style-type: none"> ● 0 - FALSE (Unchecked) ● 1 - TRUE (Checked) |
| 8 | SundayRestrictEnabled | Bit | Whether Day of Week Restriction needs to be enabled for Sunday or not | Yes | Enumeration: <ul style="list-style-type: none"> ● 0 - FALSE (Unchecked) ● 1 - TRUE (Checked) |

Employee Service Account - Holiday Restrictions (Instance Level Setting)

| Field Number | Field | Type | Description | Mandatory | Comments |
|--------------|-------------------|---------|--|---|---|
| 1 | AccountId | Integer | Valid / existing Employee Service Account ID (Account Type = Hourly) | Yes | Valid / existing Employee Service Account ID (Account Type = Hourly) |
| 2 | Enabled | Bit | Whether Holiday Restrictions needs to be enabled or not | Yes | Enumeration: <ul style="list-style-type: none"> ● 0 - FALSE (Unchecked) ● 1 - TRUE (Checked) |
| 3 | HolidayScheduleId | Integer | Valid / existing Holiday Schedule ID | Conditional - Required if (Enabled = 1) else, it should be left blank | Valid / existing Holiday Schedule ID |

Vendor Service Accounts (FI Mode Only)

| Field # | Field | Type | Description | Required | Comments |
|---------|-----------|---------|--|----------|-----------------------------|
| 1 | ProfileId | Integer | Unique identifier for the Vendor Profile | Yes | Must use existing Id in DCI |



| | | | | | |
|---|------------------|---------|---|-----|--|
| 2 | ParentAccountId | Integer | Unique identifier for the Client Funding Account to be associated with the Vendor Account | Yes | Must use existing Id in DCI |
| 3 | CostCenterId | Integer | Unique identifier for the Cost Center | Yes | Must use existing Id in DCI |
| 4 | AccountReference | String | The third-party reference for the Account | Yes | Min Length: 2 Max Length: 150 |
| 5 | AccountType | Integer | Account Type for the Service Code | Yes | See “Admin Guide: Static Data Reference File for Imports” in the Help Center |

Update Accounts – Status

This import updates the status of Client Funding, Employee Service, Client Service, and Vendor Service Accounts.

| Field # | Field | Type | Description | Comments |
|---------|-----------|---------|--|-----------------------------|
| 1 | AccountId | Integer | Valid account Id (required) | Must use existing Id in DCI |
| 2 | Status | Boolean | Change the account to active or inactive (required) | 1 - Active 2 - Inactive |

Update Employee Service Accounts - Relationship Type

| Field # | Field | Type | Description | Required | Comments |
|---------|----------------|---------|--------------------------------|----------|----------------------------|
| 1 | AccountId | Integer | Unique Id of Account | Yes | Accepts only integer value |
| 2 | RelationshipId | Integer | Unique Id of Relationship type | Yes | Accepts only integer value |

Authorizations

Authorization Entries

| Field # | Field | Type | Description | Required | Comments |
|---------|-------|------|-------------|----------|----------|
|---------|-------|------|-------------|----------|----------|



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| | | | | | |
|----|---------------------------|----------|--|----------|--|
| 1 | AccountId | Integer | Unique identifier for the Client Funding Account | Yes | Must use existing Id in DCI |
| 2 | AuthorizationIDReference | String | The third-party reference for the Authorization Entry | Optional | Min Length: 2 Max Length: 250 |
| 3 | StartDate | DateTime | Date Authorization becomes effective | Yes | Valid date in the Format: MM/DD/YYYY |
| 4 | EndDate | DateTime | Date Authorization expires | Yes | Valid date in the Format: MM/DD/YYYY |
| 5 | MonthlyMax | Decimal | Maximum draw per month | Optional | Min Length: 0 Max Length: 10 |
| 6 | WeeklyMax | Decimal | Maximum draw per week | Yes | Min Length: 1 Max Length: 10 |
| 7 | DailyMax | Decimal | Maximum draw per day | Yes | Min Length: 1 Max Length: 10 |
| 8 | BillingUnitId | Integer | Unit unique identifier; Pulled from the Account UnitId Field | Optional | Should match the Billing Unit provided in Corresponding Service Code |
| 9 | BillingRate | Decimal | Billing Rate per transaction unit | Yes | Min Length: 0 Max Length: 13 |
| 10 | RemainingBalance | Decimal | The balance of Units remaining | Optional | Min Length: 0 Max Length: 10 |
| 11 | Nonbillable | Boolean | Authorization is not billable | Yes | 0 - No 1 - Yes |
| 12 | EligibilityCode | String | Third-party code for eligibility for Funding | Optional | Min Length: 0 Max Length: 200 |
| 13 | InitialBalance | Decimal | The original balance of the Authorization | Yes | Min Length: 1 Max Length: 10 |
| 14 | AuthorizationExpiration | DateTime | Date the Authorization expires | Yes | Valid date in the Format: MM/DD/YYYY |
| 15 | MaximumDailyBillableUnits | Decimal | Maximum billable units under unit rate | Optional | Should be less than 999.99 |



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| | | | | | |
|----|---------------------------|---------|---|----------|---|
| 16 | DailyRate | Decimal | Fixed rate if total Units above MaximumDailyBillableUnits | Optional | Should be less than 999.99 |
| 17 | AuthorizationIDReference1 | String | Optional Data Storage Field | Optional | Max Length: 20 characters |
| 18 | AuthorizationIDReference2 | String | Optional Data Storage Field | Optional | Max Length: 20 characters |
| 19 | AuthorizationIDReference3 | String | Optional Data Storage Field | Optional | Max Length: 20 characters |
| 20 | AuthorizationIDReference4 | String | Optional Data Storage Field | Optional | Max Length: 20 characters |
| 21 | AuthorizationIDReference5 | String | Optional Data Storage Field | Optional | Max Length: 20 characters |
| 22 | HideInitialBalance | Boolean | Hiding Initial Balance | Required | 0 - False 1 - True |
| 23 | BillingHold | Boolean | Whether Billing Hold is Enabled or Not | Optional | Enumeration: ● 0 - No ● 1 - Yes FYI: If left blank for an Authorization, the system will consider it as 0 (No). |

Rate Change Authorization Entries

| Field # | Field | Type | Description | Required | Comments |
|---------|-------|------|-------------|----------|----------|
|---------|-------|------|-------------|----------|----------|

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| | | | | | |
|---|--------------------------|---------|--------------------------------------|----------|---|
| 1 | StartDate | Date | Date Authorization becomes effective | Yes | Must be in format "MM/DD/YYYY" Should be within the authorization date range |
| 2 | EndDate | Date | Date Authorization expires | Yes | Must be in format "MM/DD/YYYY" |
| 3 | BillingRate | Decimal | Billing Rate per Transaction Unit | Yes | Should be less than 999.99 |
| 4 | EntryId | Integer | Parent Authorization Id | Yes | Must use existing Id in DCI |
| 5 | AuthorizationIDReference | String | Updated value for Auth Ref Field | Optional | If left blank, this field will be marked "Null" upon import Min Length: 2 Max Length: 250 |

| | | | | | |
|----|---------------------------|--------|----------------------------------|----------|---|
| 6 | AuthorizationIDReference1 | String | Updated value for Auth Ref Field | Optional | If left blank, this field will be marked “Null” upon import Min Length: 2 Max Length: 250 |
| 7 | AuthorizationIDReference2 | String | Updated value for Auth Ref Field | Optional | If left blank, this field will be marked “Null” upon import Min Length: 2 Max Length: 250 |
| 8 | AuthorizationIDReference3 | String | Updated value for Auth Ref Field | Optional | If left blank, this field will be marked “Null” upon import Min Length: 2 Max Length: 250 |
| 9 | AuthorizationIDReference4 | String | Updated value for Auth Ref Field | Optional | If left blank, this field will be marked “Null” upon import Min Length: 2 Max Length: 250 |
| 10 | AuthorizationIDReference5 | String | Updated value for Auth Ref Field | Optional | If left blank, this field will be marked “Null” upon import Min Length: 2 Max Length: 250 |

Authorization Balance Adjustments

| Field # | Field | Type | Description | Required | Comments |
|---------|-------|------|-------------|----------|----------|
|---------|-------|------|-------------|----------|----------|

| | | | | | |
|---|-------------|---------|--|----------|---|
| 1 | EntryId | Integer | Valid Entry Id | Yes | Must use existing Id in DCI |
| 2 | Date | Date | Date for which changes are to be made | Yes | Must be in format “MM/DD/YYYY” |
| 3 | Amount | Decimal | Amount value to update i.e., Amount to be updated in the authorization entry | Yes | Must include 2 digits following a decimal (xx.xx) |
| 4 | ReasonId | Integer | Reason Id Valid existing Id for the Reason present in Authorization Balance Adjustment Reason | Yes | Must use existing Id in DCI |
| 5 | Description | String | Description for Adjustment | Optional | Max Length = Not defined |

Update Authorization - Initial Balance

| Field # | Field | Type | Description | Required | Comments |
|---------|----------------|---------|--|----------|--------------------------------------|
| 1 | EntryId | Integer | Unique identifier for Entries | Yes | Must use existing Id in DCI |
| 2 | InitialBalance | Decimal | Changes the Initial Balance of an already present Auth | Yes | Should be a decimal or integer value |

Reject Approved Authorizations

| Field # | Field | Type | Description | Required | Comments |
|---------|-----------------|---------|---|----------|-----------------------------|
| 1 | authorizationid | Integer | The unique identifier for authorization entry | Yes | Must use existing Id in DCI |
| 2 | note | String | Description for rejection | Yes | N/A |

Update Authorization - Dates



| Field # | Field | Type | Description | Required | Comments |
|---------|----------------|---------|---|----------|--------------------------------|
| 1 | EntryId | Integer | Valid Authorization Id | Yes | Must use existing Id in DCI |
| 2 | StartDate | Date | Date that you want to update for existing Authorization | Yes | Must be in format "MM/DD/YYYY" |
| 3 | EndDate | Date | Date that you want to update for existing Authorization | Yes | Must be in format "MM/DD/YYYY" |
| 4 | ExpirationDate | Date | Date that you want to update for existing Authorization | Yes | Must be in format "MM/DD/YYYY" |

Update Authorization - Miscellaneous Data

| Field # | Field | Type | Description | Required | Comments |
|---------|-------|------|-------------|----------|----------|
|---------|-------|------|-------------|----------|----------|

Import Formats – Admin Guide

| | | | | | |
|---|---------------------------|---------|------------------------------------|----------|---|
| 1 | EntryId | Integer | Valid Entry Id | Yes | Must use existing Id in DCI |
| 2 | AuthorizationIDReference | String | Updated value for Auth Ref Field | Optional | If left blank, this field will be marked “Null” upon import Min Length: 2 Max Length: 250 |
| 3 | AuthorizationIDReference1 | String | Updated value for Auth Ref Field | Optional | If left blank, this field will be marked “Null” upon import Min Length: 2 Max Length: 250 |
| 4 | AuthorizationIDReference2 | String | Updated value for Auth Ref Field | Optional | If left blank, this field will be marked “Null” upon import Min Length: 2 Max Length: 250 |
| 5 | AuthorizationIDReference3 | String | Updated value for Auth Ref Field | Optional | If left blank, this field will be marked “Null” upon import Min Length: 2 Max Length: 250 |
| 6 | AuthorizationIDReference4 | String | Updated value for Auth Ref Field | Optional | If left blank, this field will be marked “Null” upon import Min Length: 2 Max Length: 250 |
| 7 | AuthorizationIDReference5 | String | Updated value for Auth Ref Field | Optional | If left blank, this field will be marked “Null” upon import Min Length: 2 Max Length: 250 |
| 8 | EligibilityCode | String | Updated value for Eligibility Code | Optional | Min Length: 0 Max Length: 200 |

Update Authorization - Max Data

| Field # | Field | Type | Description | Required | Comments |
|---------|---------------------------|---------|---|----------|--|
| 1 | EntryId | Integer | Valid Authorization Id | Yes | Must use existing Id in DCI |
| 2 | MonthlyMax | Decimal | Maximum limit per month for Authorization | Yes | Amount should be less than Initial Balance and cannot be Zero |
| 3 | WeeklyMax | Decimal | Maximum limit per Week for Authorization | Yes | Amount should be less than Monthly Max and cannot be Zero |
| 4 | DailyMax | Decimal | Maximum limit per Day for Authorization | Yes | Amount should be less than Weekly Max and cannot be Zero |
| 5 | MaximumDailyBillableUnits | Decimal | Maximum limit for Daily Billable Units | Optional | It can accept Zero value and Decimal values but can't accept Negative values Must be less than 999.99 |
| 6 | Nonbillable | Boolean | Authorization is not billable | Yes | Enumeration: ● 0 - No ● 1 - Yes |

Update Rate Change Start and End Dates

| Field # | Field | Type | Description | Required | Comments |
|---------|---------------|---------|---|----------|--|
| 1 | AuthID | Integer | Valid Authorization ID | Yes | Existing Authorization ID for which we want to update Date Range |
| 2 | RateStartDate | Date | Start Date that you want to update for existing Authorization | Yes | Valid Date Format: MM/DD/YYYY |
| 3 | RateEndDate | Date | End Date that you want to update for existing Authorization | Yes | Valid Date Format: MM/DD/YYYY |



Entries

Employee Entries

| Field # | Field | Type | Description | Required | Comments |
|---------|-------------------|----------|--|--|--|
| 1 | AccountId | Integer | Identifier of the Employee Service Account | Yes | Must use existing Id in DCI |
| 2 | Amount | Decimal | Amount corresponding to the entry | Yes | Difference between StartDateTime and EndDateTime |
| 3 | EntryReference | string | The third-party reference for the entry | Optional | Max Length: 250 |
| 4 | StartDate | DateTime | Start Date and Time for the Punch | Yes | Must be in format MM/DD/YYYY hh:mm |
| 5 | EndDate | DateTime | End Date and Time for the Punch | Yes | Must be in format MM/DD/YYYY hh:mm |
| 6 | DiagnosticCode | string | Id of the Diagnostic Code | Optional | Min Length: 2 Max Length: 20 |
| 7 | PayRate | Integer | Rate Id of Pay Rate associated with Employee Service Account | Blank unless AllowOverlappingPayRates= Yes in ESA and Date of service has Multiple Rates | Must use existing Id in DCI |
| 8 | CannedStatementId | Integer | Canned Statement Id associated with entry | Optional | Must use existing Id in DCI. To locate, navigate to the Service Code details widget, then expand the canned statements and export. |
| 9 | ReasonCodeId | Integer | Reason Code Id associated with entry | Conditional - Required (The field is mandatory if any Reason Code is linked) | Must use existing Id in DCI |



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|----|-----------------------|---------|--|---|---|
| | | | | corresponding to the Funding Source else the field can be left blank) | |
| 10 | ReasonCodeText | Varchar | Reason Code Text linked corresponding to the Reason Code | Conditional - Required (If RequireFreeTextNote = Yes, it is mandatory for user to add Reason Code Text otherwise can be left blank) | Min Length: 4 Max Length: 250 |
| 11 | Notes | String | Free Text Note that's to be linked with the entry | Optional | Min Length = 1 Max Length = 200 |
| 12 | ClockInEVVLocationID | Integer | Clock In EVV Location ID associated with entry | Conditional - Required if the EVV Location Required setting on the service code is set to Yes. Optional if set to No. | Only valid for account type Hourly Must use existing EVV Location Id in DCI. To locate, navigate to the client profile, select the EVV Location tab, and select the EVV Location. The ID is listed in the URL. |
| 13 | ClockOutEVVLocationID | Integer | Clock Out EVV Location ID associated with entry | Conditional - Required if the EVV Location Required setting on the service code is set to Yes. Optional if set to No. | Only valid for account type Hourly Must use existing EVV Location Id in DCI. To locate, navigate to the client profile, select the EVV Location tab, and select the EVV Location. The ID is listed in the URL. |

Cancel Employee Entries

| Field # | Field | Type | Description | Required | Comments |
|---------|----------------|---------|---|--|---|
| 1 | EntryId | Integer | Unique Id of Punch | Yes | Punch Id that needs to be voided |
| 2 | Note | String | Note to be linked with Entry | Optional | Max Length = Not Defined |
| 3 | ReasonCodeId | Integer | Unique identifier for Reason Code | Conditional Required if any active reason codes exist for the funding source associated with the punch entry | Unique Id of Reason Codes |
| 4 | ReasonCodeText | String | Text added corresponding to the reason code | Conditional Required | If RequireFreeTextNote = Yes, it is mandatory for user to add Reason Code Text Note: Min Length = 4 characters |

Void Employee Entries

| Field # | Field | Type | Description | Required | Comments |
|---------|---------|---------|------------------------|----------|--------------------------------------|
| 1 | EntryId | Integer | The Unique Id of Punch | Yes | Id of Punch that needs to be voided |
| 2 | Note | String | Note | Optional | Any Note to be linked with the entry |

Client Fee Entries (FI Mode Only)

| Field # | Field | Type | Description | Required | Comments |
|---------|-----------|---------|----------------|----------|----------------------------------|
| 1 | AccountId | Integer | Valid Entry Id | Yes | Valid Id for Authorization Entry |



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| | | | | | |
|---|---------|---------|--|----------|--------------------------------------|
| 2 | Date | Date | Date for which changes are to be made | Yes | Valid Date Format: MM/DD/YYYY |
| 3 | Amount | Decimal | Amount value to update i.e., Amount to be updated in the authorization entry | Yes | Min length = 2 Max length = 150 |
| 4 | Note | String | Any Note to be attached for the Entry | Optional | Max Length = Not Defined |
| 5 | FeeType | Integer | Valid Fee Type Id | Optional | Should be an existing Id of Fee Type |

EVV Fob Entries

| Field # | Field | Type | Description | Required | Comments |
|---------|----------------|----------|--|----------|--|
| 1 | AccountId | Integer | The unique identifier for the employee service account | Yes | Must use existing Id in DCI |
| 2 | Amount | Decimal | The entry amount | Yes | Difference between StartDateTime and EndDateTime |
| 3 | EntryReference | String | The third-party reference for the entry | Optional | Max Length: 250 |
| 4 | StartDate | DateTime | The start date and time for the punch | Yes | Must be in format "MM/DD/YYYY hh:mm" |
| 5 | EndDate | DateTime | The end date and time for the punch | Yes | Must be in format "MM/DD/YYYY hh:mm" |
| 6 | StartDateToken | Integer | The 6 digit code produced by the FOB at the start of the shift. | Yes | Must be 6 digits |
| 7 | EndDateToken | Integer | The 6 digit code produced by the FOB at the end of the shift. | Yes | Must be 6 digits |
| 8 | DiagnosticCode | String | The diagnosis code for the punch (not used for attendance entries) | Optional | Min Length: 2 Max Length: 20 |
| 9 | Notes | String | Free Text Note that's to be linked with the Entry | Optional | Max Length = 200 |

Mileage Entries

| Field # | Field | Type | Description | Required | Comments |
|---------|-------|------|-------------|----------|----------|
|---------|-------|------|-------------|----------|----------|

Import Formats – Admin Guide

| | | | | | |
|---|----------------|----------|--|--|---|
| 1 | AccountId | Integer | Unique identifier for the Employee Service Mileage Account | Yes | Must use existing Id in DCI |
| 2 | Amount | Decimal | Entry Amount in miles | Yes | The Difference between value of End Odometer reading and Start Odometer reading |
| 3 | EntryReference | String | The third-party reference for the Entry | Optional | Min Length = 1 Max Length: 250 |
| 4 | StartOdometer | Decimal | Start Odometer Reading | Yes | Allows decimal values up to two digits |
| 5 | EndOdometer | Decimal | End Odometer Reading | Yes | Allows decimal values up to two digits |
| 6 | ServiceDate | DateTime | Service Date the mileage occurred | Yes | Format: MM/DD/YYYY |
| 7 | PayRate | Integer | Rate Id of Pay Rate associated with Employee Service Account | Blank unless Conditional - Required if AllowOverlappingPayRates= Yes and Date of service has Multiple Rates | Must use existing Id in DCI |
| 8 | ReasonCodeId | Integer | Unique Identifier for Reason Code | Optional | Must be an existing Id of Reason Code in DCI |
| 9 | ReasonCodeText | String | Text added corresponding to the reason code | Conditional - (If RequireFreeTextNote = Yes, it is mandatory for user to add Reason Code Text otherwise can be left blank) | Note: Min Length = 4 characters |

Residential Program Entries (Employee Punch Entries)

| Field # | Field | Type | Description | Required | Comments |
|---------|----------------|----------|---|--|--|
| 1 | AccountId | Integer | Identifier of the Employee Service Account for account type residential | Yes | Must use existing Id in DCI |
| 2 | Amount | Decimal | Time entry amount | Yes | Difference between StartDateTime and EndDateTime |
| 3 | EntryReference | String | To link reference entry | Optional | Max Length = 250 |
| 4 | StartDate | DateTime | Start Date and Start Time for the punch | Yes | Must be in format "MM/DD/YYYY hh:mm" |
| 5 | EndDate | DateTime | End Date and End Time for the punch | Yes | Must be in format "MM/DD/YYYY hh:mm" |
| 6 | DiagnosticCode | String | Diagnostic Code for the Punch | Optional | Min Length: 2 Max Length: 20 |
| 7 | PayRate | Integer | Rate Id of Pay Rate associated with Employee Service Account | Blank unless Conditional - Required if AllowOverlappingPayRates= Yes and Date of service has Multiple Rates (No Primary Pay Rate exists for Date of Service) | Must use existing Id in DCI |

Absence Entries (Client Absences for Residential)

| Field # | Field | Type | Description | Required | Comments |
|---------|-------|------|-------------|----------|----------|
|---------|-------|------|-------------|----------|----------|

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| | | | | | |
|---|----------------|----------|--|----------|---|
| 1 | AccountId | Integer | Unique identifier for the Client Service Account for the program | Yes | Must use existing Id in DCI |
| 2 | Amount | Decimal | Enter 0 | Yes | Enter 0 – system calculates based on program settings |
| 3 | EntryReference | String | The third-party reference for the Entry | Optional | Min Length = 1 Max Length = 250 |
| 4 | StartDate | DateTime | Start Date and Time for the Absence | Yes | Format: MM/DD/YYYY hh:mm |
| 5 | EndDate | DateTime | End Date and Time for the Absence | Yes | Format: MM/DD/YYYY hh:mm |
| 6 | Reason | String | Reason for the Absence | Yes | Must use existing Id in DCI (Unique Reason Id) |

Day Program Entries

| Field # | Field | Type | Description | Required | Comments |
|---------|----------------|----------|--|--------------------------------------|--|
| 1 | AccountId | Integer | Employee Service Account Id | Yes | Must use existing Id in DCI |
| 2 | Amount | Integer | Amount corresponding to the Entry | Yes | It is the difference between StartDateTime and EndDateTime |
| 3 | EntryReference | string | The third-party reference for the Entry | Optional | Max Length: 250 |
| 4 | StartDate | DateTime | Start Date and Time for the Punch | Yes | Format: MM/DD/YYYY hh:mm |
| 5 | EndDate | DateTime | End Date and Time for the Punch | Yes | Format: MM/DD/YYYY hh:mm |
| 6 | DiagnosticCode | string | Id of the Diagnostic Code | Optional | Min Length: 2 Max Length: 20 |
| 7 | PayRate | Integer | Rate Id of Pay Rate associated with Employee Service | Blank unless AllowOverlappingPayRate | Must use existing Id in DCI |



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| | | | | | |
|--|--|--|---------|--|--|
| | | | Account | es= Yes in ESA and Date of service has Multiple Rates (No Primary Pay Rate exists for Date of Service) | |
|--|--|--|---------|--|--|

Canned Statements

| Field # | Field | Type | Description | Required | Comments |
|---------|-------------------|---------|--|----------|-----------------------------|
| 1 | EntryId | Integer | Unique identifier for the Punch Entry | Yes | Must use existing Id in DCI |
| 2 | CannedStatementId | Integer | Unique identifier for the Canned Statement | Yes | Must use existing Id in DCI |

Vendor Payment Entries (FI Mode Only)

| Field # | Field | Type | Description | Required | Comments |
|---------|------------------------------|----------|---|----------|---|
| 1 | AccountId | Integer | Unique identifier for the Vendor Service Account | Yes | Must use existing Id in DCI |
| 2 | Amount | Decimal | Amount is the daily amount of the service entered by the user | Yes | Max Length = 10 Amount should be greater than 0.00 |
| 3 | EntryReference | String | The third-party reference for the Entry | Optional | Min Length = 1 Max Length = 20 |
| 4 | ServiceDate | DateTime | The Service Date for the Punch | Yes | Should be in format "MM/DD/YYYY" |
| 5 | InvoiceNumber | String | Invoice Number | Yes | Alpha-numeric Min Length: 1 Max Length: 100 |
| 6 | CannedStatementId | Integer | The unique id of the Canned Statement | No | Should be an existing id |
| 7 | VendorPaymentReferenceField1 | Varchar | Third party reference field | No | Min Length = 2 Max Length = 50 |



| | | | | | |
|----|------------------------------|---------|---|----------|------------------------------------|
| 8 | VendorPaymentReferenceField2 | Varchar | Third party reference field | No | Min Length = 2 Max Length = 50 |
| 9 | VendorPaymentReferenceField3 | Varchar | Third party reference field | No | Min Length = 2 Max Length = 50 |
| 10 | VendorPaymentReferenceField4 | Varchar | Third party reference field | No | Min Length = 2 Max Length = 50 |
| 11 | VendorPaymentReferenceField5 | Varchar | Third party reference field | No | Min Length = 2 Max Length = 50 |
| 12 | Notes | String | Free Text Note that's to be linked with the Entry | Optional | Min Length = 1 Max Length = 200 |

Reimbursement Entries (FI Mode Only)

| Field # | Field | Type | Description | Required | Comments |
|---------|-----------------|---------|---|----------|---|
| 1 | AccountId | Integer | Unique identifier for the Employer Service Account | Yes | Should be an existing Id of Employer Service Account |
| 2 | Amount | Decimal | Entry Amount | Yes | Amount here refers to the Daily Amount of the Service entered by the user |
| 3 | EntryReference | String | The third-party reference for the Entry | Optional | Min Length = 1 Max Length = 20 |
| 4 | ServiceDate | Date | Service Date for the Punch | Yes | Valid Format: MM/DD/YYYY |
| 5 | AssignedPayCode | Varchar | The column will store the value that is selected by the user while adding Reimbursement Entry | No | Must use existing ID in DCi |
| 6 | Notes | String | Free Text Note that's to be linked with the Entry | Optional | Min Length = 1 Max Length = 200 |

Group Service Employee Entries

| Field # | Field | Type | Description | Required | Comments |
|---------|-------|------|-------------|----------|----------|
|---------|-------|------|-------------|----------|----------|

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| | | | | | |
|---|----------------|----------|---|--|--|
| 1 | AccountId | Integer | Unique identifier for the Employee Group Service Account | Yes | Must use existing Id in DCI |
| 2 | Amount | Decimal | Entry Amount | Yes | Difference between StartDateTime and EndDateTime |
| 3 | EntryRef | String | The third-party reference for the Entry | Optional | Max Length: 250 |
| 4 | StartDate | DateTime | Start Date and Time for the Punch | Yes | Must be in format "MM/DD/YYYY" |
| 5 | EndDate | DateTime | End Date and Time for the Punch | Yes | Format: MM/DD/YYYY hh:mm |
| 6 | DiagnosticCode | String | Diagnostic Code for the Punch | Optional | Min Length: 2 Max Length: 20 |
| 7 | PayRate | Integer | Pay Rate corresponding to the punch entry. Rate Id of PayRate associated with Employee Service Account. | Blank unless AllowOverlappingPayRates= Yes in ESA and Date of service has Multiple Rates | Must use existing Id in DCI |

Group Service Client Entries

| Field # | Field | Type | Description | Required | Comments |
|---------|-------|------|-------------|----------|----------|
|---------|-------|------|-------------|----------|----------|

| | | | | | |
|---|-----------------|----------|---|----------|--|
| 1 | EmployeeEntryId | Integer | Unique Punch Id created through Group Service Employee Entry | Yes | Should be an existing Id of the Employee Entry |
| 2 | AccountId | Integer | Unique identifier for the Client Service Account | Yes | Must use existing Id in DCI |
| 3 | Amount | Decimal | Entry Amount | Yes | Difference between StartDateTime and EndDateTime Should be the same as of Employee Entry data |
| 4 | EntryRef | String | The third-party reference for the Entry | Optional | Max Length: 250 |
| 5 | StartDate | DateTime | Start Date and Time for the Punch | Yes | Format: MM/DD/YYYY hh:mm Should be the same as of Employee Entry data |
| 6 | EndDate | DateTime | End Date and Time for the Punch | Yes | Format: MM/DD/YYYY hh:mm Should be the same as of Employee Entry data |
| 7 | DiagnosticCode | String | Diagnostic Code for the Punch (not used for Attendance Entries) | Optional | Min Length: 2 Max Length: 20 |

Reject Group Service Entries

| Field # | Field | Type | Description | Required | Comments |
|---------|---------|---------|--|----------|---------------------------------------|
| 1 | EntryID | Integer | Unique Punch Id created through Group Service Employee Entry | Yes | Id of punch that needs to be rejected |
| 2 | Note | String | Note | Optional | Any note to be linked with the entry |

Approve Group Service Entries

| Field # | Field | Type | Description | Required | Comments |
|---------|-------|------|-------------|----------|----------|
|---------|-------|------|-------------|----------|----------|

| | | | | | |
|---|---------|---------|--|----------|---------------------------------------|
| 1 | EntryID | Integer | Unique Punch Id created through Group Service Employee Entry | Yes | Id of punch that needs to be approved |
| 2 | Note | String | Note | Optional | Any note to be linked with the entry |

Accrued Time Adjustment Entries (FI Mode Only)

| Field # | Field | Type | Description | Required | Comments |
|---------|-------------|---------|--|----------|--|
| 1 | AccountId | Integer | Unique identifier for the Employer Service Account | Yes | This should be existing Employee Service Account Id |
| 2 | Date | Date | Date for which the Amount is to be added | Yes | Acceptable Format: MM/DD/YYYY |
| 3 | Amount | Integer | Amount to be added 'or' subtracted in the Authorization for Accrued Time Entry Off | Yes | <p><u>FYI:</u></p> <ul style="list-style-type: none"> ● Amount value should be allowed to be either positive or negative. ● Positive value will have the effect of increasing the Accrued Time Off balance for the account, whereas the Negative value will decrease it. |
| 4 | ReasonId | Integer | Reason specified for the Adjustment | Yes | Item Id of Authorization Balance Adjustment Reason from Settings module under the Custom Drop Down tab |
| 5 | Description | String | Description added by the User | Optional | Max Length = Not Defined |

Training

Certification Requirements

| Field # | Field | Type | Description | Required | Comments |
|---------|-------|------|-------------|----------|----------|
|---------|-------|------|-------------|----------|----------|

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| | | | | | |
|----|-----------------------------|----------|---|--|---|
| 1 | RequirementName | String | Name of the Requirement | Yes | Min Length: 2 Max Length: 50 |
| 2 | TargetProfileType | Integer | Type of Target Profile (Employee, Client) | Yes | See “Admin Guide: Static Data Reference File for Imports” in the Help Center |
| 3 | RequirementDescription | String | Requirement Description | Yes | Min Length: 2 Max Length: 250 |
| 4 | NonRecurringRequirement | Boolean | Requirement is Recurring or Non Recurring | Yes | 0 - False 1 - True |
| 5 | ValidDurationMonths | Integer | Valid Duration Months | Conditional - Required if NonRecurringRequirement = False | Max Value = 65 |
| 6 | ExpirationReminderDays | Integer | Expiration Reminder Days | Conditional - Required only if NonRecurringRequirement = False | Not greater than valid duration Month*30 |
| 7 | ExpirationReminderFrequency | Integer | Expiration Reminder Days | Conditional - Required if NonRecurringRequirement = False | Not greater than Expiration Reminder Days |
| 8 | Status | Integer | Status | Yes | See “Admin Guide: Static Data Reference File for Imports” in the Help Center |
| 9 | CourseReference | nvarchar | Third party reference for the courses required for the certification | Optional | Third party reference for the courses required for the certification |
| 10 | CustomDuration | Bit | The field specified whether custom duration required for the certification or not | Optional | The field specified whether custom duration required for the certification or not |

Certification Templates

| Field # | Field | Type | Description | Required | Comments |
|---------|---------------------|---------|----------------------|----------|----------------------------------|
| 1 | TemplateName | String | Name of the Template | Yes | Min Length: 2 Max Length: 50 |
| 2 | TemplateDescription | String | Template Description | Yes | Min Length: 2 Max Length: 250 |
| 3 | Status | Integer | Status | Yes | 1 - Active 2 - Inactive |

Template Requirements

| Field # | Field | Type | Description | Required | Comments |
|---------|---------------|---------|---|----------|-----------------------------|
| 1 | TemplateId | Integer | Unique identifier for the Certification Template | Yes | Must use existing Id in DCI |
| 2 | RequirementId | Integer | Unique identifier for the Certification Requirement | Yes | Must use existing Id in DCI |

Cost Center Training Template

| Field # | Field | Type | Description | Required | Comments |
|---------|--------------|---------|--|----------|-----------------------------|
| 1 | CostCenterId | Integer | The unique identifier for the Cost Center | Yes | Must use existing Id in DCI |
| 2 | TemplateId | Integer | The unique identifier for the Certification Template | Yes | Must use existing Id in DCI |

Service Code Training Template

| Field # | Field | Type | Description | Required | Comments |
|---------|---------------|---------|--|----------|-----------------------------|
| 1 | ServiceCodeId | Integer | The unique identifier for the Service Code | Yes | Must use existing Id in DCI |



| | | | | | |
|---|------------|---------|--|-----|-----------------------------|
| 2 | TemplateId | Integer | The unique identifier for the Certification Template | Yes | Must use existing Id in DCI |
|---|------------|---------|--|-----|-----------------------------|

Account Training Template

| Field # | Field | Type | Description | Required | Comments |
|---------|------------|---------|---|----------|-----------------------------|
| 1 | AccountId | Integer | The unique identifier for the Accounts (Client Funding, Master Program) | Yes | Must use existing Id in DCI |
| 2 | TemplateId | Integer | The unique identifier for the Certification Template | Yes | Must use existing Id in DCI |

Client/Employee Training Template

| Field # | Field | Type | Description | Required | Comments |
|---------|------------|---------|---|----------|-----------------------------|
| 1 | ProfileId | Integer | The unique identifier for the Profiles (Employee, Client) | Yes | Must use existing Id in DCI |
| 2 | TemplateId | Integer | The unique identifier for the Certification Template | Yes | Must use existing Id in DCI |

Profile Certifications

| Field # | Field | Type | Description | Required | Comments |
|---------|-------|------|-------------|----------|----------|
|---------|-------|------|-------------|----------|----------|

| | | | | | |
|----|-----------------------------|---------|---|----------|--------------------------------|
| 1 | ProfileId | Integer | Unique identifier for the Employee Profile | Yes | Must use existing Id in DCI |
| 2 | RequirementId | Integer | Unique identifier for the Certification Requirement | Yes | Must use existing Id in DCI |
| 3 | CertificationDate | Date | Date Certification becomes effective | Yes | Must be in format "MM/DD/YYYY" |
| 4. | CertificationExpirationDate | Date | Date Certification becomes expired | Optional | Format: MM/DD/YYYY |

EVV

EVV Fob

| Field # | Field | Type | Description | Required | Comments |
|---------|-----------------------|---------|-----------------------------------|----------|---|
| 1 | ProfileId | Integer | Valid Profile Id | Yes | Must use existing Id in DCI |
| 2 | FOBSerialNumber | String | Valid Serial Number of FOB device | Yes | Serial Number printed on the FOB Device |
| 3 | OTPTokenEVVLocationID | String | EVV Location Profile ID | YES | Must use existing Id in DCI |

EVV Location

| Field # | Field | Type | Description | Required | Comments |
|---------|-------|------|-------------|----------|----------|
|---------|-------|------|-------------|----------|----------|

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| | | | | | |
|---|-----------------|---------|---|--|--|
| 1 | ProfileId | Integer | Valid Profile Id | Yes | Must use existing Id in DCI |
| 2 | EVVLocationName | String | Name of EVV Location | Yes | Min Length: 2 Max Length: 50 |
| 3 | EVVLocationType | Integer | EVV Location Type | Yes | See “Admin Guide: Static Data Reference File for Imports” in the Help Center |
| 4 | AddressLine1 | String | Address Line 1 | Conditional - (If EVV Location Type = Public Space this field can be left blank) | Min Length: 2 Max Length: 150 |
| 5 | City | String | City | Conditional - (If EVV Location Type = Public Space this field can be left blank) | Min Length: 2 Max Length: 20 |
| 6 | State | String | State | Conditional - (If EVV Location Type = Public Space this field can be left blank) | The state's two letter abbreviation (i.e., AZ) |
| 7 | ZipCode | String | Postal Code | Conditional - (If EVV Location Type = Public Space this field can be left blank) | Length = 5 numerals |
| 8 | BeginDate | Date | Begin Date (Start Date of EVV Location) | Required | Valid Date Format: MM/DD/YYYY |
| 9 | IsPrimary | Boolean | Is Primary | Yes | See “Admin Guide: Static Data Reference File for Imports” in the Help Center |



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| | | | | | |
|----|---------------|---------|---------------------------------|--|--|
| 10 | PhoneNumber | Bit | Phone number | Optional | Phone number |
| 11 | PhoneVerified | Bit | Phone number is verified or not | Optional | Accepts only two values 0 or 1 1 = Phone number is verified 0 = Phone number is not verified |
| 12 | PhoneType | Integer | Type of Phone | Optional | Accepts integer value |
| 13 | PhoneCarrier | Integer | Phone Carrier | Optional | Accepts Integer value |
| 14 | Country | String | 3 Letter Country Code | Conditional - (If EVV Location Type = Public Space this field can be left blank) | Should be USA |
| 15 | Status | Integer | Status | Yes | See “Admin Guide: Static Data Reference File for Imports” in the Help Center |

Notes

Notes

| Field # | Field | Type | Description | Required | Comments |
|---------|-------|------|-------------|----------|----------|
|---------|-------|------|-------------|----------|----------|

| | | | | | |
|---|-------------|----------------------|-------------------------------------|--|---|
| 1 | ItemType | Integer | Valid Item Type Id | Yes | See “Admin Guide: Static Data Reference File for Imports” in the Help Center |
| 2 | UnitItemId | Integer | Valid Profile Id | Yes | Must use existing Id in DCI |
| 3 | NoteType | Integer | Integer value for the Note Type | Yes | See “Admin Guide: Static Data Reference File for Imports” in the Help Center |
| 4 | NoteSubType | Integer | Integer value for the Note Sub Type | Conditional - Required only if Note = NoteSubType otherwise this field can be left blank | Any Note Sub Type Id |
| 5 | NoteSubject | Text | Text for the Note Subject | Yes | Can add note text here |
| 6 | IsBase64 | Boolean | Accepts value 0 or 1 | Yes | 0 - False, will be treated as plain-text 1 - True, will be treated as Base64-encoded RTF |
| 7 | NoteBody | Base 64 encoded Data | Base 64 encoded Data | Yes | Base 64 encoded Data can be passed in the Import File |
| 8 | NoteAddedBy | Integer | Integer | Optional | Profile Id |

Custom Fields

Custom Field

| Field # | Field | Type | Description | Required | Comments |
|---------|-------|------|-------------|----------|----------|
|---------|-------|------|-------------|----------|----------|

| | | | | | |
|---|---------------|-----------------------------------|--|---|--|
| 1 | CustomFieldID | Integer | Valid Custom Field Id | Yes | Must use existing Id in DCI |
| 2 | TargetItemID | Integer | Valid Profile / Entry Id | Yes | Existing Id of any Entry / Profile (such as: Client, Employee etc.) with which the Custom Field needs to be associated |
| 3 | Value | Integer String Date List | Any value either as Integer, String, Date and List based on Input Type of Custom Field | Conditional – Required if Custom Field is Required and else, it will be Optional) | Accepts Integer, String, Date and List Values on the basis of Input Type selection of the field: CustomfieldId mentioned above |

Diagnosis Codes

Client Diagnosis

| Field # | Field | Type | Description | Required | Comments |
|---------|-----------------|---------|----------------------|---|---|
| 1 | ClientProfileId | Integer | Profile Id of Client | Yes | Must use existing Id in DCI |
| 2 | CodeType | Integer | Diagnosis Code Type | Yes | See “Admin Guide: Static Data Reference File for Imports” in the Help Center |
| 3 | DiagnosisCode | String | Diagnosis Code | Conditional - Required only for ICD-10, otherwise the field can be left blank | Min Length: 2 Max Length: 50 Accepts alpha-numeric values and (.) and (-) hyphen characters are allowed. Do not use commas. |
| 4 | Axis | Integer | Axis | Conditional – Required only for the case of DSM-IV, otherwise the field can be left blank | See “Admin Guide: Static Data Reference File for Imports” in the Help Center |
| 5 | Description | String | Description | Required except for | Min Length: 5 Max Length: 2500 |



| | | | | | |
|---|---------------|----------|---|----------|--|
| | | | | ICD-10 | Applies to all Code Types except ICD-10 |
| 6 | DiagnosisDate | DateTime | The Diagnosis Date i.e., the Date when the Diagnosis for the Client needs to be added | Yes | Must be in format "MM/DD/YYYY" Cannot be a future date |
| 7 | Status | Integer | Diagnosis Status | Optional | 1 - Active 2 - Inactive Blank - defaults to 1 if left blank |
| 8 | Primary | Integer | Indicates primary diagnosis for the client | Yes | 0 - No 1 - Yes Blank - defaults to 0 if left blank *Will not override a current primary diagnosis |

ICD-10

| Field # | Field | Type | Description | Required | Comments |
|---------|-----------------|---------|--|----------|---|
| 1 | DiagnosisCodeId | Integer | Unique identifier for each Diagnosis Code | Yes | Diagnosis Code Id of ICD-10 Diagnosis Codes added in the system. Found in Settings tab under Diagnosis Codes |
| 2 | Status | Integer | It will update the Status of Diagnosis Code under Settings tab | Yes | 1 - Active 2 - Inactive |