

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

Contents

Creating a Template	3
Reasons for Import Failure	3
Settings	4
Cost Centers	4
Funding Source.....	4
Regions	10
Service Codes	11
Roles.....	18
Permissions.....	18
Holiday Schedule	19
Holidays.....	19
Profiles.....	19
Employees	19
Client.....	23
Guardian.....	26
Guardian Client Link.....	28
Day Program.....	28
Residential Program.....	30
Case Workers	32
Vendor Profiles (FI Mode Only).....	34
Group Service Profiles	36
Update Employee Profile.....	37
Update Employee Profile Element	39
Update Client Profile Element.....	40
Accounts.....	42
Client Funding Accounts.....	42
Client Service Accounts.....	44



Employee Service Accounts	45
Update Employee Service Account - Status	48
Employee Service Account Burden Multiplier Rate (FI Mode Only)	48
Employee Service Accounts Payrate	49
Employee Service Account Day of Week Restrictions (Instance Level Setting)	49
Employee Service Account Holiday Restrictions (Instance Level Setting)	50
Vendor Service Accounts (FI Mode Only)	51
Update Employee Service Account - Status	51
Update Employee Service Accounts - Relationship Type	51
Authorizations	52
Authorization Entries	52
Rate Change Authorization Entries	54
Authorization Balance Adjustments	56
Update Authorization Initial Balance	57
Reject Approved Authorizations	57
Update Authorization Dates	57
Update Authorization Miscellaneous Data	58
Update Authorization Max Data	60
Update Rate Change Start and End Dates	60
Entries	61
Employee Entries	61
Void Employee Entries	62
Client Fee Entries (FI Mode Only)	62
Group Service Employee Entries	63
Group Service Client Entries	64
Day Program Entries	64
Residential Program Entries (Employee Punch Entries)	65
Mileage Entries	66
Absence Entries (Client Absences for Residential)	68
Accrued Time Adjustment Entries (FI Mode Only)	68
Cancel Employee Entries	69
Canned Statements	70
Vendor Payment Entries (FI Mode Only)	70
EVV Fob Entries	71
Reimbursement Entries (FI Mode Only)	72

Training.....	72
Certification Requirements	72
Certification Templates.....	74
Template Requirements	74
Cost Center Training Template.....	74
Service Code Training Template	74
Account Training Template.....	75
Profiles Training Template.....	75
Profile Certifications	75
EVV	76
EVV Fob	76
EVV Location	76
Notes.....	78
Notes.....	78
Custom Fields.....	79
Custom Field.....	79
Diagnosis Codes	80
Client Diagnosis.....	80
ICD-10	81

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
---------	-------	------	-------------	----------	----------

Import Formats – Admin Guide

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

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



Import Formats – Admin Guide

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

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

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>

Import Formats – Admin Guide

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				

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

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)

Import Formats – Admin Guide

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

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>

Import Formats – Admin Guide

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

Import Formats – Admin Guide

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

Employees

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	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



Import Formats – Admin Guide

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

Import Formats – Admin Guide

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

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

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

Guardian Client Link

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

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

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

Import Formats – Admin Guide

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	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 - SSN - Employee Number	Yes	Columns: SSN



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



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



					<ul style="list-style-type: none"> - RetainSSN - ProfileReference - AuthenticationStatus - EnableCareGiverRatingEmails - EnableCareManagement - EnableVendorPayments - 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

Import Formats – Admin Guide

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	Payrate Name Item Id	Yes	Must use existing Id in DCI. Is Relationship type pay rate in Static Data Reference Guide.
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

Import Formats – Admin Guide

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

Update Employee Service Account - Status

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

Employee Service Account Burden Multiplier Rate (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 Payrate

Field #	Field	Type	Description	Required	Comments
1	PayRate	Integer	Id of the Pay Rate	Yes	Must use existing Id in DCI. Is Relationship type pay rate in Static Data Reference Guide.
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)

					<ul style="list-style-type: none"> ● 1 - TRUE (Checked)
4	WednesdayRestrictEnabled	Bit	Whether Day of Week Restriction needs to be enabled for Wednesday or not	Yes	Enumeration: <ul style="list-style-type: none"> ● 0 - FALSE (Unchecked) ● 1 - TRUE (Checked)
5	ThursdayRestrictEnabled	Bit	Whether Day of Week Restriction needs to be enabled for Thursday or not	Yes	Enumeration: <ul style="list-style-type: none"> ● 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 Employee Service Account - Status

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)	See “Admin Guide: Static Data Reference File for Imports” in the Help Center

Update Employee Service Accounts - Relationship Type

Field	Field	Type	Description	Require	Comments
-------	-------	------	-------------	---------	----------



#				d	
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
---------	-------	------	-------------	----------	----------

Import Formats – Admin Guide

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

Import Formats – Admin Guide

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
---------	-------	------	-------------	----------	----------

Import Formats – Admin Guide

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	Optional	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



				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

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
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	Yes	Min length = 2 Max length = 150



			to be updated in the authorization entry		
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

Group Service Employee Entries

Field #	Field	Type	Description	Required	Comments
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

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 Account	Blank unless AllowOverlappingPayRates= Yes in ESA and Date of service has Multiple Rates (No Primary Pay Rate exists for Date of Service)	Must use existing Id in DCI

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"



Import Formats – Admin Guide

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

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

Absence Entries (Client Absences for Residential)

Field #	Field	Type	Description	Required	Comments
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)

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

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

Import Formats – Admin Guide

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

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"



Import Formats – Admin Guide

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

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
---	-------	--------	---	----------	------------------

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

Training

Certification Requirements

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

Import Formats – Admin Guide

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

Profiles 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
---------	-------	------	-------------	----------	----------

Import Formats – Admin Guide

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



Import Formats – Admin Guide

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



Import Formats – Admin Guide

				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