

Screen Scraping

Description: In this topic, the user will learn about screen scraping which is an automated process that pulls new or updated authorizations from a funding source database and uploads them into the system. This feature can be enabled at the funding source level.

Role Required: Super User

Permission Required: Funding Source Admin

- [Compatible Databases](#)
- [To Enable/Disable Screen Scraping for a New Funding Source](#)
- [To Enable/Disable Screen Scraping for an Existing Funding Source](#)
- [Service Code Default Rates and Maxes](#)
- [Run the Screen Scraping Process Manually](#)
- [Run the Screen Scraping Process Automatically](#)
- [Results Summary File Information](#)
- [Downloaded Authorizations](#)

[Related articles](#)

Compatible Databases

- Focus - Arizona
- eXPRS - Oregon

*Please note: These are currently the only databases that support this feature.

To Enable/Disable Screen Scraping for a New Funding Source

1. Log in to DCI
2. Select **Settings** from the main menu
3. Select **Funding Sources** from the submenu
4. Click **Actions**
5. Select **Add New Funding Source**
6. Complete the Add New Funding Source form wizard
 - i. Click **Yes** to enable the system to utilize the screen scraping functionality for this funding source
 - ii. Click **No** to disable screen scraping
 - a. **Click the blue plus sign (+) next to Authorization Automation Integration to expand the section**
 - b. Supports Automated Authorization Download field
 - c. Authorization Management System URL: Select the system from the drop-down options
 - d. Authorization Management System User Name: Enter user name for system
 - e. Authorization Management System Password: Enter password for system
7. Click **Save** and **Yes** to confirm

To Enable/Disable Screen Scraping for an Existing Funding Source

1. Log in to DCI
2. Select **Settings** from the main menu
3. Select **Funding Sources** from the submenu
4. Use the filters to locate the funding source and click **Search**
5. **Click anywhere in the funding source row** to view details
6. Click **Actions**
7. Select **Edit Funding Source** from the drop-down menu
8. View and edit the Edit Funding Source form wizard
 - i. Click **Yes** to enable the system to utilize the screen scraping functionality for this funding source
 - ii. Click **No** to disable screen scraping
 - a. **Click the blue plus sign (+) next to Authorization Automation Integration to expand the section**
 - b. Supports Automated Authorization Download field
 - c. Authorization Management System URL: Select the system from the drop-down options
 - d. Authorization Management System User Name: Enter user name for system
 - e. Authorization Management System Password: Enter password for system
9. Click **Save** and **Yes** to confirm

Changes to the funding source can be saved even if the login credentials for the authorization management system are incorrect. After the screen scraping processes runs, an email notification will be sent to the email address listed on the funding source profile.

Users receive a notification if the login failed. This email notification is configured in DCI and will typically be sent to users with a billing role for the cost center of the funding source. If unsure who should receive this email, please contact the supervisor or site administrator.

Service Code Default Rates and Maxes

Users have the option to set default rates and default daily, weekly, and monthly maxes on service codes. When these values are set, the system will use them on new authorizations. The default rates and maxes will also prepopulate when a user manually creates an authorization for that service code, however the values will be editable.

*NOTE: It is important for AZ DDD screen scrape that defaults are set, however OR eXPRS screen scrape utilizes a different process that will pull the rates and maxes during the screen scrape process.

To set default rates:

1. Log in to DCI
2. Select **Settings** from the main menu
3. Select **Funding Sources** from the submenu
4. Use the filters to locate the funding source and click **Search**
5. **Click anywhere in the funding source row** to view details
6. Scroll down to select the **Service Codes** tab
7. Use the filters and click **Search** or scroll down to locate the service code
8. **Click anywhere in the service code row** to view details
9. Click **Actions**
10. Select **Edit Service Code** from the drop-down menu
11. Click the blue **plus sign (+)** next to Default Auth Specs. Enter the following fields:
 - a. Default Billing Rate
 - b. Default Daily Max
 - c. Default Weekly Max
 - d. Default Monthly Max
12. Click **Save** and **Yes** to confirm

Run the Screen Scraping Process Manually

1. Log in to DCI
2. Select **Import** from the main menu
3. Click **Actions**
4. Select **Run Automated Authorization Download Process** from the drop-down menu
5. In the Select Funding Source form wizard, select the funding source.
 - a. If the funding source is not an option in the drop-down, ensure that screen scraping is enabled and all fields are completed on the funding source details screen.
6. Click **Yes** and **OK** to confirm
7. After the process has completed, an email will be sent to the email address listed on the funding source with an attached Excel file summary of all new, updated, excluded, and failed authorizations that were attempted.
 - a. For failed authorizations, a column will be present with a description as to why failure occurred.

Run the Screen Scraping Process Automatically

1. DCI will run the screen scraping process as a scheduled job every night to check the authorization management system for all new, updated, excluded, and failed authorizations.
2. After the process has completed, an email will be sent to the email address listed on the funding source with an attached Excel file summary of all new, updated, excluded, and failed authorizations that were attempted.
 - a. For failed authorizations, a column will be present with a description as to why failure occurred.
3. The results file will also be saved on the funding source profile page on the Attachments tab.

*Please note that all new authorizations are created with a status of pending and must be approved.

Results Summary File Information

Updates to Screen Scraping Authorizations (Auth Result = Created):

- New Authorization
 - The authorization ID of a new authorization is unique, and the start or end date does not overlap an existing authorization.

Updates to Screen Scraping Authorizations (Auth Result = Edited):

- Initial Balance Change
 - The authorization ID of a new authorization is the same as an existing authorization with a different initial balance
- Effective Date Change
 - The authorization ID of a new authorization is the same as an existing authorization with a different start date
- End Date Change
 - The authorization ID of a new authorization is the same as an existing authorization with a different end date

Exclusions to Screen Scraping Authorizations (Auth Result = Excluded):

- Duplicate Authorization
 - The authorization ID, start date, and initial balance of the new authorization are the same as the existing authorization in the system.
- Duplicate Authorization with a different Rate
 - If the rate is different on an excluded authorization, the results report will show a result of Excluded with an Exception of "Rate Mismatch." This is specific to authorizations downloaded from OR eXPRS.

Failures to Screen Scraping Authorizations (Auth Result = Failed):

- Overlapping Authorization
 - The authorization ID of the new authorization is unique but the start or end date overlaps with an existing authorization
- No Client profile associated with the authorization
 - The system could not find a profile in the system with the same client ID as listed on the authorization
- No Client funding account associated with the authorization
 - The Client Funding Account (CFA) Account Reference field must contain the client ID that is listed on the authorization, less any leading zeros. The client ID on the client's profile must also exclude leading zeros. If the system cannot find a CFA with the client ID in the Account Reference field, the authorization will fail to be added to DCI.
 - The Service Code *name* in DCI MUST match the bill codes in AZ DDD's system or OR eXPRS' system. For example:
 - Respite = RSP
 - Attendant Care = ATC
 - Habilitation = HAB
 - The Service Code's Default Billing Rate under Default Auth Specs MUST have a rate that matches AZ DDD's or OR eXPRS' system. Rate books can be found by clicking on the following links:
 - [AZ DDD Website](#)
 - [OR eXPRS Website](#)
- Multiple funding account matches found
 - The system found more than one CFA for the same client and service code
- The service code is missing a default billing rate
 - This is specific to authorizations downloaded from Focus (AZ DDD)
- Fractional units
 - This exception occurs if the value for the initial balance is calculated by amount divided by rate and that calculation results in a decimal number. This is specific to authorizations downloaded from OR eXPRS.

Downloaded Authorizations

To mass approve new pending authorizations, a SQL ticket must be submitted through Zendesk. Authorizations created in DCI using screen scraping cannot be mass-approved through the DCI portal user interface - not even through the import module's "Approve Imported Authorizations" functionality. Authorizations may be approved individually by clicking Home on the main menu and selecting Pending Authorizations on the submenu.

Related articles

- [Import Formats - Admin Guide](#)
- [Reports Guide](#)
- [System Set-Up - Admin Guide](#)
- [Billing Module - Admin Guide](#)
- [Payroll Module - Admin Guide](#)