

CHARGE IMPORT UTILITY INSTRUCTIONS

Introduction

The *Charge Import Utility* is an optional add-on function that may be purchased. It is used to upload and process data files containing patient and procedure information and import the data into the *Unposted Procedures* function. The data files must adhere to the *File Specifications* provided.

Pre-requisites

- A folder must be created on the workstation to hold the data files that will be imported. For example, *C:\ImportCharges*. Each data file must be copied into this folder prior to using the *Charge Import Utility* function.
- Each data file must be created as a comma-separated file. The file extension can be .csv or .txt; either extension is acceptable.
- Each data file must adhere to the *File Specifications* provided.
- Unique filenames should be used for each data file. For example, *2018-01-16_Charges_DB1.txt* (YYYY-MM-DD_Charges_DB(database#).txt)
- The data file cannot contain any column or row headings, otherwise it will not import.
- The data file must have commas present in between each piece of data including commas in place for the columns that have no information in them.

Overview

The following outlines the process to upload and import files.

- Copy Data Files to the Workstation Folder
- Set Default Data Source (*performed at startup only*)
- Upload File(s)
- Check File Integrity
- Resolve any Errors or Warnings
- Import Charges

Copy Data Files to the Workstation

Copy the comma-separated data file(s) to the folder on the workstation. For example, *C:\ImportCharges*. Each filename should be unique and must adhere to the *File Specifications* provided.

The *Charge Import Utility* function is located on the *Transactions* menu. Upon accessing the function, a listing of any files that have already been uploaded but not yet imported will display. The Filename, Data Source and Date Created will be listed for each file.

Charge Import Utility - Select File			CompuGroup Medical US WESTSIDE MEDICAL CLINIC (7)
Upload Files	Filename ▼	Data Source	Date Created
Default Source	2018-01-23_Charges_DB7.txt	File	01/23/2018 13:04:38
Refresh			

Set a Default Data Source

The Data Source is used in *Unposted Procedures* to identify the original source of the procedures. It is automatically set to 'File' but you can change it by clicking the **Default Source** Action Column button to enter a new **Default Source** to be stored for all future files. You will also have the option to change the data source for individual files prior to importing them, if needed.

Charge Import Utility - Default Data Source

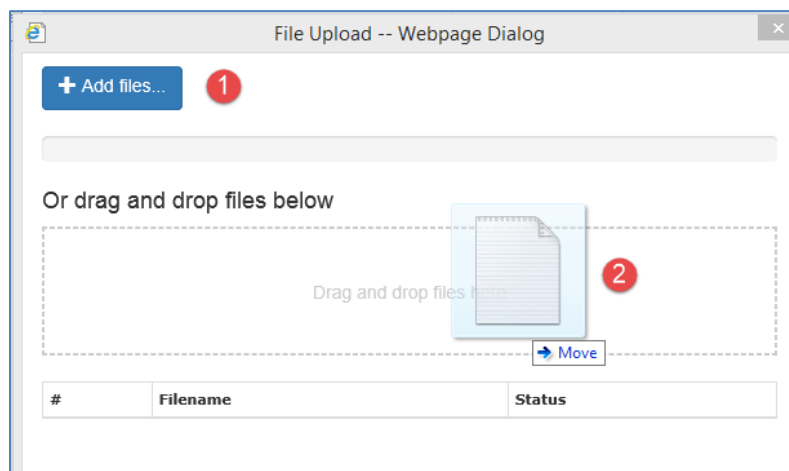
Default Source ✓

Upload Files

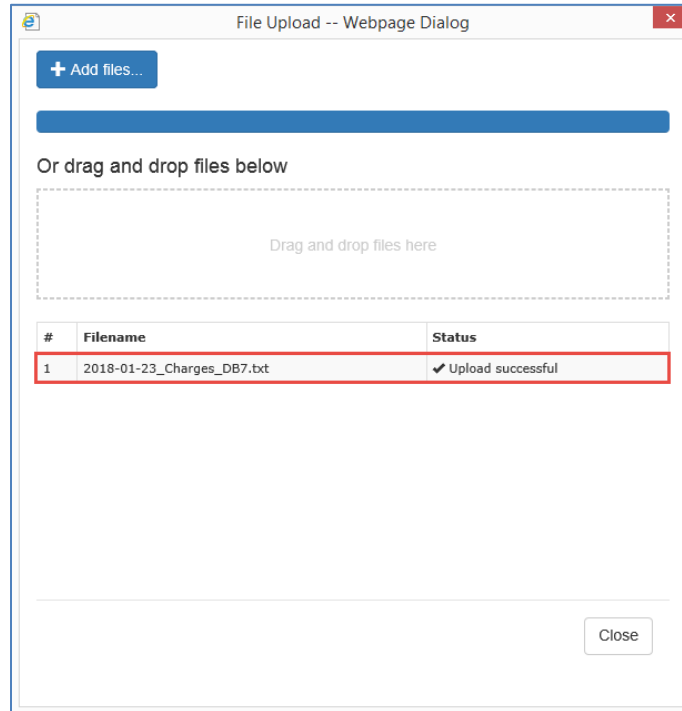
Click the **Upload Files** Action Column button to upload the data file(s). When the **File Upload** dialog box displays, you have two options:

Charge Import Utility - Select File			CompuGroup Medical US WESTSIDE MEDICAL CLINIC (7)
Upload Files	Filename ▼	Data Source	Date Created
Default Source	2018-01-23_Charges_DB7.txt	File	01/23/2018 13:04:38
Refresh			

1. Click **Add files**, navigate to the folder where the file(s) is stored, select the file(s) you want and click **Open**.
2. Open Windows Explorer, navigate to the folder where the file(s) is stored, select the file(s) you want then drag and drop the selected file(s) onto the **File Upload** dialog box.



Check the file upload **Status** in the bottom portion of the **File Upload** dialog box to confirm the file(s) successfully uploaded.



Click **Close** to return to the *Charge Import Utility* screen.

Check File Integrity

The data integrity of each file has to be checked to ensure it adheres to the defined File Specifications after you have uploaded it. Click in the File row to select the file you want to process.

Charge Import Utility - Select File				System Manager WESTSIDE MEDICAL CLINIC (7)
Upload Files	Filename	Data Source	Date Created	
History	2018-01-24_Charges_DB7 (1).txt	Import	01/25/2018 10:15:22	
Default Source	2018-01-31_Charges_DB7.txt	Import	01/31/2018 14:36:57	
Refresh				

The data in the file will be checked and the results will display including the **Status** of the file, **Data Source** and the number of **Records** included in the file.

Charge Import Utility			System Manager WESTSIDE MEDICAL CLINIC (7)
Delete File	File Name: 2018-01-24_Charges_DB7 (1).txt		
Change Source	Status	Data Source	Records
Import Charges	Clean File	Import	3

There are three different Status settings possible:

- **Clean** – No errors or warnings were found with the data and the file is ready to be imported.
- **Import with Warnings** – The data for the ‘required’ fields passed, but some of the other fields will need to be corrected. You can still import a file that contains warnings and correct the data prior to posting the procedures or you can **Delete** the file, correct the data errors within the data file and then **Upload** the corrected file.
- **Errors** – The file cannot be imported until the errors have been corrected. You will need to **Delete** the file, correct the errors within the data file and then **Upload** the corrected file.

Resolve any Errors or Warnings

When a file contains errors, you must delete the file, correct the errors and upload the corrected file. When a file contains warnings, you have the option to delete the file and correct the data prior to importing the charges or you can proceed with importing and correct the data prior to posting the charges to the patient’s account.

After you select a file and the data integrity has been checked, detailed information for the errors or warnings is provided to assist you in correcting the data. The **Record** and **Field** numbers will be listed in addition to the **Value** contained in the Field. An **Error** or **Warning** message will also identify the problem with the data. For easy reference when you are correcting the errors, you can print the detailed information using the **Print** Action Column button.

Charge Import Utility								System Manager EASTSIDE MEDICAL (1)	
Delete File		File Name: 2018-01-31_Charges_DB7.txt							
Change Source		Status	Data Source	Records	Record	Field	Value	Errors (1)	Warnings (1)
Print		Errors		3	0				
					1	16	555555		Diagnosis Code 1 Table Item Undefined
					3	3	222	Patient Not Found	

Note: The **Import Charges** Action Column button will not be available until the file no longer contains errors.

Import File(s)

If the file Status is **Clean**, you can proceed with importing the charges. If the file Status is **Import with Warnings**, you can still import it and correct the data prior to posting the procedures or you can **Delete** the file, correct the data errors within the data file and then Upload the corrected file.

Charge Import Utility				System Manager WESTSIDE MEDICAL CLINIC (7)	
Delete File		File Name: 2018-01-24_Charges_DB7 (1).txt			
Change Source		Status	Data Source	Records	
Import Charges		Clean File	Import	3	

To import a file, click the **Import Charges** Action Column button. After the charges have been imported, the following will display:

Charge Import Utility

Importing Charges..

Charges have been imported into Unposted Procedures.

You can access *Unposted Procedures* to view and post the imported charges. The **Source** will display the value you entered when you set the **Default Source**.

Unposted Procedures																	
Sta	Source	Account	Patient Name	Superbill	Billing Group	Dept	P	Dr	I	Dr	Loc	DOS	CPT	Med	Amt	ICD-9 / Other	ICD-10 / Other
	Import	3	PHILLIPS, MARTIN <i>Diagnosis/CPF cross-linking table error 99214 for Diagnosis 838.0.</i>	CA		44	1	1	1			03-01-18	99214		178.00		838.0
	Import	4	BLACKWELL, RANDY H <i>Invalid Diagnosis Code_89988. Missing Referring Dr. One or more Authorization attachments may be required. Invalid ICD-10 code for this date of service_88888. Diagnosis/CPF cross-linking table error 99214 for Diagnosis 88888.</i>	MI		44	1	1	1			03-01-18	99214		1078.00		88888
												03-02-18	99214		179.00		89988

History

After a file has been imported, basic file information is stored and can be accessed using the **History** Action Column function.

Charge Import Utility - Select File				System Manager WESTSIDE MEDICAL CLINIC (7)
Upload Files	Filename	Data Source	Date Created	
History				
Default Source				
Refresh				

Upon accessing the **History** function, a listing of every file that has been imported will display. The Filename, User Code, Import Timestamp and the number of Records imported will be listed for each file.

Charge Import Utility - History of Imported Files				System Manager WESTSIDE MEDICAL CLINIC (7)
Filename	User Code	Import Timestamp ▲	Records	
02122018_DB1_Charges.csv	HOPE	03/05/2018 14:14:56	4	
2018-03-02_Charges_DB1-hosp.txt	MGR	03/02/2018 16:42:54	3	
2018-03-02_Charges_DB1 and DB7.txt	MGR	03/02/2018 16:33:03	6	
2018-03-02_Charges_DB1.txt	MGR	03/02/2018 16:28:01	3	

You can view the individual Records contained in each file and the values stored in each field by clicking anywhere in the File row to select the file.

Charge Import Utility - History of Imported Files			System Manager WESTSIDE MEDICAL CLINIC (7)
Filename	User Code	Import Timestamp ▲	Records
02122018_DB1_Charges.csv	HOPE	03/05/2018 14:14:56	4
2018-03-02_Charges_DB1-hosp.txt	MGR	03/02/2018 16:42:54	3
2018-03-02_Charges_DB1 and DB7.txt	MGR	03/02/2018 16:33:03	6
2018-03-02_Charges_DB1.txt	MGR	03/02/2018 16:28:01	3

Each Record contained in the file will display and every field contained in the File Specifications will be listed for each record. The fields will be listed in the same order as they appear in the File Specifications, starting from the left side of the screen.

Charge Import History - File 2018-03-02_Charges_DB1 and DB7.txt											System Manager WESTSIDE MEDICAL CLINIC (7)
File was imported 03/02/2018 16:33:03 By user MGR											
Database ▼	User Code	Account Number	Accounting Date	Service Date	Location	Procedure Code	Modifier 1	Modifier 2	Multiplier	Charge Amount	Procedure Desc
1	MGR	4		03012018	1	99214			1		
1	MGR	10		03012018	1	99214			1		
1	MGR	15		03012018	1	99214			1		
7	MGR	2		03022018	1	99214			1		
7	MGR	3		03022018	1	99214			1		
7	MGR	6		03022018	1	99214			1		

When you are done reviewing the data, click **Proceed** to return to the History screen.