Importing Authorizations

DATA DICTIONARY REQUIREMENTS

You must first add the fields for ImportAuthorization to the Data Dictionary.

- If the internal Credible IDs are not being used for the import (for example, the Program Code is in the import file instead of the numeric autoassigned Program ID), you must set the lookups accordingly in Data Dictionary.
- You do *not* need to set Data Dictionary for Authorization Level (auth_level), Visit Type Group (visittype_group), or Credential Group (credential_group). These will match automatically on the Auth Level Name, Visit Type Grouping Code, and Credential Group Code respectively.

IMPORT NOTES

One Authorization per import row will be created. If more than one visittype_id field is included in the same row, the authorization will appear with a dropdown showing the visit types. This is the same as manually entering an authorization and selecting multiple visit types.

The exception is importing in an Authorization Level, in which case one Authorization will be created for each Level having that same name. For example, MedicaidAuth is the shared name of five authorization levels, importing this in ONCE for the client will create all five MedicaidAuth authorizations.

An import row can have either the auth_level OR visittype_group OR the visittype_id1 to 15 fields.

If an authorization for the same client, same payer, same auth number and same period start/end dates as an existing authorization is imported, the existing one will be updated instead of creating an entirely new authorization.

FIELDS AND USAGE NOTES

Field	Usage
client_id	Required
payer_id	Required
period_start	Required; a dash or slash is needed between month, day, and year (6-1-10 or 6/1/10); leading zeros on month and day are optional; year can be two- or four-digit
period_end	Required; a dash or slash is needed between month, day, and year (6-1-10 or 6/1/10); leading zeros on month and day are optional; year can be two- or four-digit
auth_number	Required; **Arkansas PreAuths:** use 'NOAUTHID' as the auth_number; this will be removed automatically by the import process leaving a blank auth_number
auth_units	Required; unless using Authorization Levels, then this should be blank so that the configured number of units is used; do not include commas for values of 1000 and greater
program_id	Optional; requires **Use Authorization Programs** to be set in Partner Config
location_id	Optional; requires **Use Authorization Locations** to be set in Partner Config
credential_group	Optional
count_units	Optional; if not included at all, left blank, or set to 0 will count Visits, must be set to 1 to count Units, set to 2 to count Hours, set to 3 to count Rate, set to 4 to count Days; if using Authorization Levels, then this should be blank so that the configured count type is used
external_id	Optional; primarily used when importing authorizations from another electronic system – this is analogous the external id on the client profile and is NOT the authorization number provided by the payer
ext_units_used	Optional; requires **Use Authorization External Field** to be set in Partner Config; however cannot be left blank if included in the import; do not include commas for values of 1000 and greater
auth_date	Optional; a dash or slash is needed between month, day, and year (6-1-10 or 6/1/10); leading zeros on month and day are optional; year can be two- or four-digit
auth_level	Optional; requires **Use Authorization Levels** to be set in Partner Config
visittype_group	Optional
visittype_id1 to visittype_id15	Optional