

**DEPARTMENT OF BEHAVIORAL HEALTH
APPLICATION SERVICES GROUP (ASG)
DIRECT SERVICE IMPORT PROCESS (DSI)**

OVERVIEW

The DSI Utility is a feature used to enter direct services into INSYST using built-in screens that validate the data and provide feedback to enable the provider to make corrections before storing the data in the INSYST database. Some clients, however, gather this data outside INSYST, for example using paper forms and later transferring this data to a PC database. In order to take advantage of INSYST reporting and filling features, some clients may wish to use the DSI Utility to upload external data into the INSYST database.

PROCESS REQUIREMENTS

Agencies must complete the Import Request Form and submit it to the ASG helpdesk. Once the request has been received and approved ASG will set-up a Clinic ID and Directory on the INSYST system. A primary and secondary staff must be identified for authorization to this account. Files will be imported to the assigned INSYST Directory using emulation software. (Reflection FTP).

REQUIREMENTS FOR IMPORT FILES

Import files must contain only one service month per file and follow all requirements. Files can be imported at any time throughout the month, as mutually agreed upon, however the final import file must be loaded to the assigned directory no later than 12:00 noon on the 5th day of the month following the service date. ASG will begin processing import files at 12:00 noon on the 5th day of each month. Files received after noon on the 5th may not be processed into the current months cycle. The provider must submit an e-mail notification with number of records and minutes contained for each import file to isdhelpdesk@isd.sbcounty.gov

File Characteristics:

- Comma delimited ASCII file
- All field values quoted using double quotes ("")
- Data fields delimited by commas (,)
- Records delimited by carriage returns
- * See example A

File Naming Convention:

8630_DIR_SERVICE_20031101.TXT

- 8630 = first four digits of the clinics reporting unit.
- DIR_SERVICE = type of data contained in upload file.
- 2003 = year of data contained in the file.
- 11 = month of data contained in the file.
- 01 = numerical sequence for files submitted for the month.
 - Ie. 01= first file for November, any supplemental files containing November data would be numbered consecutively.
- .TXT = file type extension

File Specifications:

There are two record types for Direct Services:

<u>Record Type</u>	<u>Description</u>
"1"	Direct Services Data – Service information
"2"	Direct Services Data – Staff/Co-Staff information

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Direct Services Record Sets:

There is one Record Set for Direct Services:

<u>Set</u>	<u>Comprised of</u>
A	1 Type "1" record, and 1 or 2 Type "2" record(s)

Direct Service Record Specifications

Record Type "1": Direct Services Data

Field Pos.	Field Description	Required	Data Picture	Default Value
1	Record type	Y	9(1)	Must be "1"
2	Client number	Y	9(9)	--
3	Reporting unit	Y	C(6)	--
4	Service day	Y	9(2)	--
5	Service month	Y	9(2)	--
6	Service year	Y	9(4)	--
7	Procedure code	Y	9(3)	--
8	Hours of service	Y	9(2)	--
9	Minutes of service	Y	9(2)	--
10	Treatment location	N	X(1)	"0"
11	Number in group	N	9(5)	"1"
12	Service cost	N	9(8)	"0.00"
13	Pregnancy Indicator	N	C(1)	N
14	Emergency Indicator	N	C(1)	N
15	Duplicate Override	N	X(2)	"00"

Record Type "2": Staff Data

Field Pos.	Field Description	Required	Data Picture	Default Value
1	Record type	Y	9(1)	Must be "2"
2	Primary staff number	Y	9(5)	--
3	Hours	N	9(2)	" " -- both fields must be entered
4	Minutes	N	9(2)	" " -- both fields must be entered

The first type "2" record contains staff information – hours and minute entries will override the type "1" record. The second type "2" record contains co-staff information including hours and minutes if it differs from what appears in the type "1" record.

Example A - Direct Service Import Record

"1", "123456789", "99991", "31", "01", "1997", "100", "1", "15", "1", "1", "0.00", "N", "N", "00" "2", "12345"	Record Set 1 (Direct Service Data with Staff Data)
"1", "123456789", "99991", "05", "02", "1997", "101", "1", "15", "1", "1", "0.00", "N", "N", "00" "2", "12345" "2", "10000", "1", "0"	Record Set 1 (Direct Service Data with Staff Data)

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Output Files:

All data in the Import Data File must pass normal INSYST screen validations. If any value in a Record Set fails validation, the entire set of records will be rejected. The Import process will produce two error files, which will be transferred to the Clinics assigned directory.

Error Text File:

The Error Text file contains a text descriptions detailing why each of the rejected Record Sets could not be imported. Each import record is shown parsed to ensure that the data mapping is correct.

Each subsystem supported requires a separate Import Data File with the name:

dir_service_ xxx_(YYMMDD).ERRTXT
xxxx=reporting unit number identified based on file naming convention
yy = year of service
mm = month of service
dd = version submitted for the service month

Error Data File:

The Error Data File contains the actual data records from the Record Sets that were rejected. This file is provided so that it may be cleaned up and resubmitted to run again. Or, if environmental problems cause records to error out, these records can be resubmitted after the environmental problem is corrected.

Each subsystem supported requires a separate Import Data File with the name:

dir_service_ xxx_(YYMMDD).ERRDAT
xxxx=reporting unit number identified based on file naming convention
yy = year of service
mm = month of service
dd = version submitted for the service month

Termination of Services:

Either party may terminate the Direct Service Import Process (DSI) by providing thirty days written notice.

Behavioral Health Department Notifications:

ASG staff will notify the following department personnel of the approval of any new clinic using the import procedure: Director, Assistant Director, Deputy Directors, Program Managers and additional ASG staff.