CentralReach's Employee Import Specification User Guide

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Revision History

Date	Version #	Description
08/02/2022	1.0	Document Creation

Overview

This user guide documents the requirements for importing employee information using the CentralReach Import interface. Users can import employee information via the Manual Import by downloading the CR Employee Import template, completing the spreadsheet, and uploading it as a CSV file. A History section containing information regarding the import and any exceptions is also available.

Please note, an auto import option will be available in a subsequent release, pending user feedback.
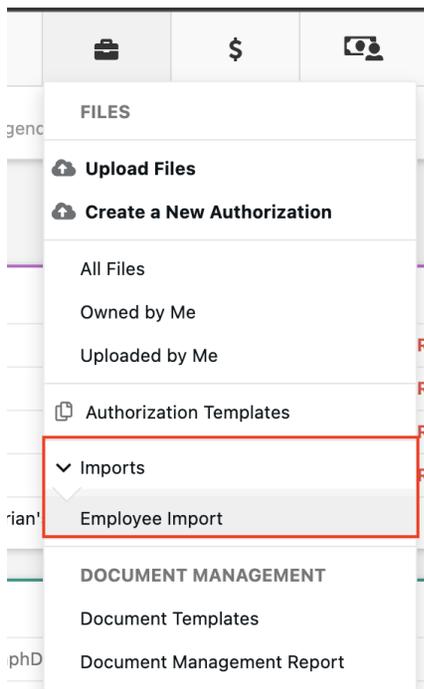
Employee Import

All employees loaded will be set to active and will incur monthly charges to your account.

⬇ USER GUIDE   ⬇ CSV TEMPLATE   ⬆ UPLOAD CSV   ⚙ AUTO IMPORT

Import history

Import date and time	Rows imported	Rows failed	Status	
11/09/21 at 2:45 PM Manual import	0	--	Failed	⌄
11/08/21 at 3:30 PM Auto import	--	--	Pending	⟳
11/07/21 at 12:00 PM Manual import	66	6	Errors	⋮
11/06/21 at 3:00 PM Manual import	0	--		
11/05/21 at 1:23 PM Manual import	26	0		
11/04/21 at 5:55 PM Auto import	78	0	Successful	⋮
11/03/21 at 9:01 AM Manual import	99	0		
11/02/21 at 4:23 PM Manual import	145	0	Successful	⋮
11/01/21 at 11:12 AM Manual import	167	0	Successful	⋮
10/30/21 at 5:00 PM Manual import	56	0	Successful	⋮

View errors
Download original
Download errors

Download original

50
100
150
200
250

Rows per page: 50   50 of 250   ‹ ›

Employee Import Workflow

The Employee Import workflow can also be found [here](#).

Accessing the Employee Import

The Employee Import is located in the Files module and can be accessed by users with the following permissions:

- (Files > Access)
- (Files > Download)
- (Files > Upload)
- (Files > Imports > Access Auto Imports & Manual Imports)
- (Insights > Access): Only needed for users to access the export in the Insights module.

To access the Employee Import and create/update employee profiles:

1. Navigate to the **Files** module, click the **Imports** drop-down, and select **Employee Import**
2. Determine if you will utilize a blank template or the CSV export file to update or create new employee profiles.
    - Using a blank template:
        i. Download the CSV template *(Files > Imports > Employee Import > Download CSV icon)*
        ii. Add information and save as "ImportType_Date" (E.g., EmployeeImport_10.01.2022).
        iii. Upload the CSV file *(Files > Imports > Employee Import > Upload CSV icon)*
    - Using the CSV export file:
        i. Navigate to the **Insights** module and select the **Staff Management** section
        ii. Click **Employee Import**, download, and save the export as "ImportType_Date" (E.g., EmployeeImport_10.01.2022).
        iii. Navigate to the **Files** module, click the **Imports** drop-down, and select **Employee Import**
        iv. Upload the CSV file *(Files > Imports > Employee Import > Upload CSV icon)*
3. The system will check for a match, if a match is found the existing employee profile will be updated. If a match is not found, the system will check for an employee Contact Form.
    - If a Contact Form is used and the "Send Login Email" box is selected, an ACTIVE employee is created and instructions are sent to them via email. If the "Send Login Email" box is NOT selected, an active employee is created and they will need to verify their email address for SSO access at a later time.
        i. If the "Send Custom Email" box is also selected, the new active employee will receive a custom email. If it is NOT selected, the new active employee will not receive a custom email.
            - Please note, active employee profiles are created and WILL incur monthly charges.

4. Contact Forms are required to add a new employee, if one is NOT provided, an employee profile CANNOT be created.

Interface Transmission Guidelines

This interface supplies the delivery mechanisms and data layout/structure necessary to provide externally sourced employee data to the CentralReach application for onboarding.

TYPE	GUIDELINE
Headers	- Header information as determined for the employee import must be included in each transmission, otherwise the entire collection of records will be rejected. - All headers included on the template and listed below are required on the first row of the import. - The header sequence does not matter; users can send the headers out of order. - Any additional columns will be skipped/ignored during import. - The first three sample files shown below will all be **successfully imported**.

Title	FirstName	MI	LastName	PrimaryEmail
Mrs	Rhonda	A	Wilson	rwilson@abacompany.com
	Jasmine		Miles	jmiles@abacompany.com

- The following image has a different header sequence.

Title	PrimaryEmail	LastName	FirstName	MI
Mrs	rwilson@abacompany.com	Wilson	Rhonda	A
	jmiles@abacompany.com	Miles	Jasmine	

- The "**GivenName**" column below will be skipped during the import, because it is not a valid column.

	• This file below will be **rejected** because it is missing the "**Title**" column.
File Format	• The Employee Import template is available for download. • The file format for both auto and manual imports is "CSV" (Comma separated values (.csv)). • The format of the information sent must match exactly the format defined in the specification. • CentralReach supports only three data types during transmission: string, number, and boolean. • The specification references additional data types to ensure that data is received in the expected formats and appropriate record level editing can be incorporated.
File Size Limit	CentralReach allows a maximum of 2 MB per file upload.
Transmission Frequency	• **Manual Import** – Users can upload a file at any time for immediate processing by using CR's provided template. *(Files > Imports > Employee Import > Upload icon)*

Transmission Mechanism	Data can be sent via a manual file upload. ● **Manual Import** – Data is processed once uploaded by using CR's provided template. *(Files > Imports > Employee Import > Upload icon)* **Employee Import** All employees loaded will be set to active and will incur monthly charges to your account. ⬇ USER GUIDE ⬇ CSV TEMPLATE ⬆ UPLOAD CSV ⚙ AUTO IMPORT **Import history** | Import date and time	Rows imported	Rows failed	Status	
---	---	---	---	---
11/09/21 at 2:45 PM Manual import	0	--	Failed	⌄
11/08/21 at 3:30 PM Auto import	--	--	Pending	↻	
Transmission Response	Import responses are recorded in the "Import History" section, and an email is sent, if provided. ● **Import date and time** – This field contains the import type, date, and time the import was completed. ● **Rows succeeded count** – The number of rows in the request that ended in a successful result. ● **Rows failed count** – The number of rows in the request that resulted in some error. ● **Status** – The status of import during and after the process is completed. ● **Error details** – The failure reason. **Error Details** ✕ Manual import on 11/09/2021 at 10:59 PM **Contact name/Row** **Failure reasons** **Ross Geller** Row 4 • The First Name length is invalid. The length should be between {min} and {max}. • The Last Name cannot be null nor empty. • The {data element} name is incorrect.

Data Quality

● All data is accepted from clients "as is."

Data Processing Rules

- Header information must be included in each transmission, otherwise the entire collection of records will be rejected.
- Any record WITHOUT an "**External System ID**" will be rejected.
- Any record WITHOUT a valid **primary email** will be rejected.
- All new employees require a Contact Form[1]. The name of the Contact Form should match exactly with the Contact Form created by the organization. *(Contacts > Utilities & Tools > Contact Forms)*
  - NOTE: The Contact Form[2] WILL **ACTIVATE** an employee and **INCUR MONTHLY CHARGES**.
    - Changing the status[3] of an employee occurs manually within the application. Complete all administration processes before making an employee INACTIVE. *(Contacts > Employees > Profile > Basics > Status)*
- If a record is received and any required data is missing, malformed, or incomplete as defined in this specification, it will be rejected.
- If an optional field is provided with an invalid value (one not listed in this specification), the field will be set to the default value, null, or rejected, unless otherwise stated.
- If text (string) field length is longer (>/greater than) than the maximum allowed for that field value, unless otherwise noted, the field will be rejected.
- Omission of an employee record in a subsequent file does not remove the employee record in the CR system. The file size could vary in different transmissions. It could be a 'change only' file, 'all employee data all the time' file, or somewhere in the middle.
- The **export** under the Insight module's Staff Management section, "Employee Import," is an easy way for users to download current employee data, update as needed, and manually import the completed file via the Employee Import. This export allows users to add an external system ID and import it back into CentralReach to populate that required field.

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[1] https://community.centralreach.com/s/article/How-To-Understand-Custom-Contact-Forms
[2] https://community.centralreach.com/s/article/How-To-Create-an-Employee-Contact-Form
[3] https://community.centralreach.com/s/article/How-To-Deactivate-or-Reactivate-a-Contact
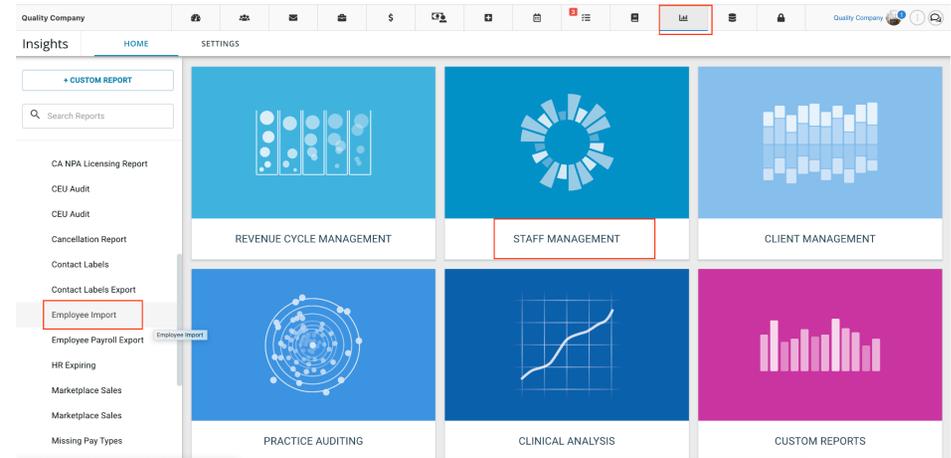
Matching Process and Processing Requirements

1. The system first checks to ensure all headers are listed.
2. The system then goes through a matching process to determine the action to be taken for each record. Matching is based on:
   - Step 1:
     - **External System ID** (A unique employee ID or similar from the customer's system. This ID **cannot** be updated via import, any changes should be performed only in UI).
   - Step 2:
     - **Last name of the employee**
     - **Date of Birth**
     - **Primary Email address** (Primary Email should be a valid and unique company email address used for SSO. Can only be added via import. Any changes to the email has to be done in UI and not allowed via import).
3. If a record is found based on the above matching criteria, the system updates the different employee attributes, as needed.
4. If a record is not found based on the above matching process, the system checks for a **Contact Form**.
5. If a Contact Form is listed with an exact name that matches the organization's already generated Contact Form, the system will add the employee.
6. An **ACTIVE** user web account will be created and start to **INCUR MONTHLY CHARGES**.
7. All deactivation of web accounts must be done manually in CentralReach.
8. The matching process in step #2 above mandates that the **External System ID and the primary email** correction of an existing employee **CANNOT** be done via this file. Such corrections **MUST** be done manually in CentralReach.
9. This file is ONLY for importing employees. Generics can be created and maintained only in CentralReach.
10. If an email address is provided, a notification email is sent for every imported file.

Rejected File / Record Process

1. All exceptions are listed in the "**Import History**" section of the Employee Import screen.
2. History provides users with information as to why a record was rejected, by displaying which row and the error that caused the rejection.
3. Users have the following options to correct the exception and complete the process:
   - Correct the row and columns with exceptions and reupload only the rejected records.

○ Manually add or update the contact directly in CentralReach.

Specification Reading Tips

- The elements listed in this specification are the fields available for transmission to the CentralReach application.
- Description of the elements are listed below along with where and why the element is needed.
- Data type and maximum length for each element is given. If data exceeds the maximum length, the row will be rejected.
- Elements are denoted as required, conditional, or optional in the applicable specification and are a named field for transmission.
  - If a field is not required, it does not need to have data, however, the header needs to be present.
  - Required fields must have valid data as per the specifications below, otherwise the system will reject the record.
  - **R** – Required, the value needed for adding and updating. For example, ExternalSystemID has to be included in all transactions or the row will fail.
  - **O** – Optional fields are not needed for adding or updating. Users can decide to include or not. For example, Employee's address.
  - **C** – Conditional fields listed below are needed only for adding new employees and not for updating. For example, ContactForm is only needed for adding new employees and not updating.
- Transaction type specifies if the value of a field can only be added, or if it can be changed during an update.
  - **A** – Add, the value for these data fields cannot be changed, only added. For example, ExternalSystemID cannot be changed for the employee.
  - **U** – Update, the value for these data fields can be changed during an update. For example, Employee's address can be changed.
- All data elements and fields in the specification indicate "NULL" is an acceptable value in the Validation Rules column. If the element does not state that NULL is an acceptable value, that element is required.

Specification Table

Element	Description	Data Type (max length)	Required / Optional	Transaction type Add &/ or Update	Validation Rules
ExternalSystemId	External system's Employee ID. *Required for matching process to locate an existing file and adding new contacts.*	Varchar (36)	R	A	No special characters, *only* alphanumeric characters. Any changes and updates should take place on UI and not via import. **The record will be rejected if this value is missing.**
ContactForm	Contact Forms used by the organization. *Required only for adding new contacts and automating onboarding processes, such as connections. This field is not required for updates.*	Reference field	C	A	Must be the exact name of the form that exists in the organization list.
HireDate	Date the employee was hired. *Required for reporting, payroll reports, and HHAeX EVV. Informational data to filter on.*	Date (10)	O	A & U	Can be NULL. Format: MM-DD-YYYY
TerminationDate	Date the employee was terminated. *Admin should complete all steps before deactivating. Data capture and informational data to filter on.*	Date	O	A & U	Can be NULL. Format: MM-DD-YYYY

Title	A prefix used before an individual's name to indicate their status, such as Dr., Dr.&Mrs., Drs., Mr., Mrs., Miss., Ms., Prof., Rev., Rabbi, Sister.	Varchar (10)	O	A & U	Can be NULL. Value should be from the list of expected values.
FirstName	Employee's first name. *Required for matching process to locate an existing file and adding new contacts.* *For completing profiles, claim settings, payroll, and EVV.*	Varchar (50)	R	A & U	No special characters. **The record will be rejected if this value is missing.**
MI	Employee's middle initial.	Varchar (1)	O	A & U	Can be NULL. No special characters.
LastName	Employee's last name. Can be changed based on marital status. *Required for matching process to locate an existing file and adding new contacts.* *For completing profiles, claim settings, payroll, and EVV.*	Varchar (50)	R	A & U	No special characters. **The record will be rejected if this value is missing.**
PrimaryEmail	SSO email used to log into CentralReach. *Required for matching process to locate an existing file and adding new contacts, SSO, EVV, and MA-DPH for MA organizations.*	Varchar (80)	R	A	Format: example@mail.com Can include letters, numbers, and special characters. Any changes and updates should take place in UI and not via import. **The record will be rejected if this value is missing.**

AddressLine1	First line of the employee's street address. PO Box may impact GPS reporting. *Used for completing a profile, claim settings, and payroll.*	Varchar (50)	O	A & U	Can be NULL. Special characters _ . ' - # , / space supported.
AddressLine2	Second line of the employee's street address. *Used for completing a profile, claim settings, and payroll.*	Varchar (50)	O	A & U	Can be NULL. Special characters _ . ' - # , / space supported.
City	City associated with the address. *Used for completing a profile, claim settings, and payroll.*	Varchar (50)	O	A & U	Can be NULL.
StateProvince	State associated with the address. *Used for completing a profile, claim settings, and payroll.*	Varchar (50)	O	A & U	Can be NULL. 2 character standard US state abbreviation or full state name.
ZipPostalCode	A 9-digit primary code associated with the address required for billing. *Used for completing a profile, claim settings, and payroll.*	Varchar (20)	O	A & U	Can be NULL. If the +4 cannot be provided, please send '0000'.
PhoneHome	Employee phone number including area code. *Used for completing a profile.*	Varchar (12)	O	A & U	Can be NULL. Format: ##########, no country code, no special characters.

PhoneCell	Employee phone number including area code. *Used for completing the profile and should be a textable phone for communications.*	Varchar (12)	O	A & U	Can be NULL. No special characters.
DateOfBirth	Employee's date of birth. *Required for matching process to locate an existing file or adding a new contact.* *For completing profiles and SSO.*	Date	R	A & U	Format: MM-DD-YYYY **The record will be rejected if this value is missing.**
Language	The primary language. *Used for completing the profile.*		O	A & U	Can be NULL. No special characters. Value should be from the list of expected values.
Gender	Gender identity, such as Prefer not to answer, NonBinary, Female, Male. *Used for completing the profile, claims, and EVV.*	Varchar (30)	O	A & U	Can be NULL. No special characters. Value should be from the list of expected values.
Credentials	College degrees, apprenticeships, certifications, or licenses that provide credibility in a work field. *Used for profile, MA-DPH (first field).* *A comma separated field.*	Varchar (50)	O	A & U	Can be NULL. Can include up to 5 comma separated credentials.

Company	The name of the company the employee works/worked for. For merger and acquisition cases, it could be the name of the old/merged organization's name.	Varchar (50)	O	A & U	Can be NULL.
SSN	Employee's Social Security Number number. *Required for a few Sandata EVV states.*	BigInt	O	A & U	Can be NULL. 9 digits, no spaces, dashes, or special characters.
NPINumber	A National Provider Identifier number issued to health care providers by CMS. *Required for claims.*	Varchar (10)	O	A & U	Can be NULL. 10 digits, no spaces, dashes, or special characters.
MedicaidId	State generated employee Medicaid number. *Required for claims and EVV.*	Varchar (50)	O	A & U	Can be NULL.
G2Number	Qualifier G2 being utilized in field 32b indicates the ID is a non-NPI number. *Required for claims.*	Varchar (50)	O	A & U	Can be NULL.
JobTitle	A name describing the employee's job or position, such as Behavior Clinician, Behaviorist, BCBA Program Supervisor. *Required for profile, payroll, and Contact Form selection.*	Varchar (250)	O	A & U	Can be NULL. Choose from the prefix list or add a new title.

PayrollCompany	Employee's payroll company. *Required for payroll and Contact Form selection. Field used to filter on.*	Varchar (50)	O	A & U	Can be NULL.
Department	Department the employee belongs to. *Required for payroll and Contact Form selection.* *Field used to filter on.*	Varchar (100)	O	A & U	Can be NULL.
PayrollEmployeeNumber	A unique identifier assigned to an employee by the payroll company (file #). *Required for payroll.*		O	A & U	Can be NULL.

Detail on Data Intake Error Handling

Once data has been transferred securely to the CentralReach system, it is evaluated at progressive levels of detail to ensure compliance with the listed specifications. This process is broken down into four separate levels of validation, each working at a finer level of detail within the data being passed:

1. **Transmission**: The mechanism of transmission of data between the source system and the CR application prior to processing the data contents.
   - Delivery completed successfully.
2. **Payload**: An error in the overall dataset being processed.
3. **Record**: Each individual set of data that consists of one complete entity or structure within the data being delivered.
   - Record integrity checks
   - Column layout valid
4. **Data Element**: The lowest level of detail, the individual data elements. Each data element has an associated data type and expected behaviors (permissible length, specific allowed values, whether it can be blank) that are checked in accordance with CR application rules.

- ○ Required data elements
- ○ Data formats
- ○ Date values/ranges

Error Type	Description	Error Response	Action / Next Steps
Invalid file	Wrong file format uploaded.	**File Failed.** *(Indicated on the history when the row is expanded).*	Upload the correct CSV file.
Invalid data element label	A data element label does not match the defined list of possible data elements. The column headers for flat file delivery must match exactly those defined in the specifications.	**Import Failed, CSV columns do not match the required headers.** *(Indicated on the history when the row is expanded).*	Correct/add headers, use the CR provided template.
Invalid file size	The size of the file exceeds the maximum allowed size.	**Import failed, the file exceeds the 2 MB limit.** *(Indicated on the history when the row is expanded).*	Make sure the file size is equal or less than 2 MB.
Invalid size/length	The length of the data element does not align to the length requirements of the target system field. A data element that is delivered with an invalid size will be rejected during the data loading.	**The {data element} length is invalid. The length should be between {min} and {max}.**	Frequently, the data element being sent is longer than the permissible length for the element as defined in the specifications.
NULL value not permitted	A data element must be populated for the record to be processed. Any record that does not contain a required value will be rejected.	**The {data element} cannot be empty.**	Add data to the required fields.
Incorrect data/value set	A data element that must be a value within a defined list. Where a data element must match a specific pattern/list or else it will be rejected.	**The {data element} name is incorrect.**	Add a valid value from the list provided for this field. Example: Contact Form, Title, Gender.

Incorrect format	The format of a supplied date data element is incorrect, and does not align to the format defined for the element in the specifications.	**The {data element} format is incorrect. The record should satisfy this format ['{date format}'].**	Correct the date format to meet specifications. Example: 'MM-dd-YYYY' or 'MM/DD/YYYY' for dates.
Invalid date value	The data element is not a valid date, based on the rules for that date field.	**The {data element} is invalid. {data element} cannot be today or in the future.**	Dates must be within a range and not in the future.
Invalid data element	Dates must be greater or less than another delivered date element.	**The {data element} is invalid.**	Enter a correct date. For example, the hire date cannot be after the termination date.
Invalid numeric range	For numeric data elements that must fall within a specific range of numbers. If the value supplied is not within the bounds defined as valid for the data element, this error will be triggered.	**The {data element} value cannot be greater than {min length}.** **The {data element} value cannot be less than {min length}.**	9 digits, no spaces, dashes, or special characters.

UI Reference

	Element	Mapping to UI
1	**ExternalSystemId**	Contacts > Employees > Profile > Basics > External System ID
2	**ContactForm**	Contacts > Utilities > Contact Forms
3	**HireDate**	Contacts > Employees > Profile > Basics > Hire Date (new field)
4	**TerminationDate**	Contacts > Employees > Profile > Basics > Termination Date
5	**Title**	Contacts > Employees > Profile > Basics > Tite
6	**FirstName**	Contacts > Employees > Profile > Basics > First Name
7	**MI**	Contacts > Employees > Profile > Basics > MI
8	**LastName**	Contacts > Employees > Profile > Basics > Last Name

9	PrimaryEmail	Contacts > Employees > Profile > Basics > E-mail
11	AddressLine1	Contacts > Employees > Profile > Basics > Address > Address
12	AddressLine2	Contacts > Employees > Profile > Basics > Address > Address #2
13	City	Contacts > Employees > Profile > Basics > Address > City
14	StateProvince	Contacts > Employees > Profile > Basics > Address > State
15	ZipPostalCode	Contacts > Employees > Profile > Basics > Address > Zip/Postal Code
16	PhoneHome	Contacts > Employees > Profile > Basics > Address > Home
17	PhoneCell	Contacts > Employees > Profile > Basics > Address > Cell
18	DateOfBirth	Contacts > Employees > Profile > Basics > DOB
19	Language	Contacts > Employees > Profile > Ext. Profile > Client Focus & Languages
20	Gender	Contacts > Employees > Profile > Basics > Gender
21	Credentials	Contacts > Employees > Profile > Basics > Credentials
22	Company	Contacts > Employees > Profile > Basics > Company
23	SSN	Contacts > Employees > Profile > Basics > SSN
24	NPI Number	Contacts > Employees > Profile > Basics > NPI Number
25	MedicaidId	Contacts > Employees > Claim Settings > Custom Identifiers > Qualifier >1D
26	G2Number	Contacts > Employees > Claim Settings > Custom Identifiers > Qualifier > G2
27	JobTitle	Contacts > Employees > Profile > Basics > Job Title
28	PayrollCompany	Human Resources > Employee > Payroll Setup > Payroll Company
29	Department	Human Resources > Employee > Payroll Setup > Department
30	PayrollEmployeeNumber	Human Resources > Employee > Payroll Setup > Payroll Employee #

Addendum 1 – CR Accepted languages

American Sign Language	French	Polish
Arabic	German	Portuguese
Armenian	Greek	Punjabi
Bosnian	Gujarati	Russian
Cantonese	Hebrew	Serbian
Chinese	Hindi	Singales
Croatian	Italian	Spanish
English	Japanese	Swedish
Farsi (Persian)	Korean	Vietnamese
Filipino (Tagalog)	Mandarin	