IndustrySafe Claims Payment Data Import Specifications

Revision 3 – 1/1/2018

1   Client Tasks

Field Requirements

- The client will create a Tab Delimited file containing the following fields:

Order	IndustrySafe Label	IndustrySafe Column Name	Data Type	Required	Data Requirements
1	TPA Claim Number	CPD_TPA_CLAIM_NUMBER	Text	Yes	The TPA Claim Number must be included and must match the TPA claim number for an existing claim in IndustrySafe
2	Payment Number	CP_PAYMENT_NUMBER	Text	No	Must be unique or left blank. If a claim payment is found with a matching payment number, that record will be updated, otherwise a new payment record will be created.
3	Date of Payment	CP_DATE	Date	Yes	Any Date: MM/DD/YYYY
4	Name of Payee	CP_PAYEE	Text	No	
5	Address	CP_ADDRESS	Text	No	
6	City	CP_CITY	Text	No	
7	State	CP_STATE	Dropdown	No	Must be a valid two-character US State abbreviation (E.g. PA)
8	Zip Code	CP_ZIPCODE	Text	No	
9	Phone Number	CP_PHONE	Text	No	
10	Billed Amount	CP_BILLED_AMT	Number	No	[Any number with up to two decimal Places]
11	Payment Amount	CP_PAYMENT_AMT	Number	No	[Any number with up to two decimal Places]
12	Services	CP_SERVICES	Textarea	No	
13	Category	CP_CATEGORY	Dropdown	No	Allowed Values: Medical, Non-Medical, Expenses, Other. If this field is left blank it will default to Other.
14	Payment Issued By	CP_PAYMENT_ISSUED_BY	Text	No	
15	Notes	CP_NOTES	Textarea	No	

File Requirements

- The file name must match a predefined value as agreed upon by the client and IndustrySafe.

- The file must contain all fields identified in the table above in the order specified.

- Any non-required field which the client does not want to import must be either blank or null.

- All blank or null fields in the import file will be set to null in the database.

- All text fields are limited to 255 Characters.

- All textarea fields are limited to 4,000 Characters.

- All dates should be formatted as MM/DD/YYYY

- Column headings should **NOT** be included with the file.

- The client will transfer this file via Secure File Transfer Protocol (sFTP or SSH File Transfer Protocol) to the IndustrySafe server (Server Address, User Name and Password to be provided by IndustrySafe).

  - Re: sFTP, see RFC 4253 (https://tools.ietf.org/html/rfc4253)

  - There are many sFTP clients to perform the task of transferring the file to the IndustrySafe server. One client application that, we recommend is FileZilla (http://filezilla-project.org). This client is simple to use, free, and allows command prompt access to fully automate the process on a scheduled basis.

  - A file can only be uploaded after the previous file has been processed by IndustrySafe.

2   IndustrySafe Tasks

- IndustrySafe will setup a sFTP site server folder. This site will utilize the standards for file security according to sFTP (see RFC 4253 https://tools.ietf.org/html/rfc4253)

- IndustrySafe will automatically sweep the sFTP site server folder for updates. When an update is found, the server will automatically begin processing the file.

- When an update is found, each record in the client-supplied file will be processed as follows:

  1. Data will be validated for proper format (such as dates in date format)
     a. Any records that fail the data validation will not be imported and display as a failed record in the audit report.

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2. The TPA Claim Number must be included and must match the TPA claim number for an existing claim in IndustrySafe.
3. If the payment number is not left blank, then the payment records in IndustrySafe will be checked for a matching payment number.
   a. If a matching record is found, the existing record will updated with the data from the import file.
   b. If a match is not found, a new record will be inserted with the data from the import file.

- IndustrySafe has provided a data import log report in system functions for the client to view the results of each import, including the number of employees added, the number of existing employees updated, and the number of employee records that failed. The report will list also list all records that failed and the error message, all new records inserted, and all records that were disabled.
- IndustrySafe will archive up to 10 completed files. Archived files will be deleted on a rolling basis.

Data import specifications for location and other data is available upon request.