Creating a CSV file in EXCEL® and Uploading to MEDS® for Batch Eligibility Inquiry

In Microsoft Excel®, the data must be arranged in columns, with each column having a header at the top that describes which data element will appear in that column, and then each subsequent row in that column containing one data element of that type. (See example to right.)

The column headers in row 1 **MUST EXACTLY MATCH** the column types in the "RES Data Import Format – CSV" specification document, as shown in the example. For any data that is to be submitted to ePACES, you must include either a "cin" column, or you must include all of "last_name", "first_name", "sex", "dob", and "ssn" columns.

	A	B	C	D
1	first_name	last_name	cin	inquiry_date
2	Jane	Doe	AB12345C	8/1/2016
3	John	Smith	XY54321Z	7/31/2016

If your upload is a full roster or census, you should include a "type" column, and the type must be "R" (roster) or "C" (census) for all rows. These lists will not automatically be submitted to ePACES and will require an extra step (described below). For a generic list of eligibility inquiries (type "E" for all rows or no "type" specified), each row after the header will have an inquiry created, using the "inquiry_date" column as the Date of Service to be submitted to ePACES. A date range can be submitted instead of a single date of service; in that case, the "inquiry_date" column would be omitted, and a "begin_date" and "end_date" column included instead. If a "begin_date" and "end_date" are specified, an inquiry will be generated for those two dates plus the first of each month between them. If both dates are within the same month, an inquiry will be generated for every day between them. So for example, if the "begin_date" is 3/4/16 and the "end_date" is 7/17/16, an inquiry will be generated for 3/4/16, 4/1/16, 5/1/16, 6/1/16, and 7/17/16. If the "begin_date" is 3/4/16 and the "end date" is 3/7/16, an inquiry will be generated for 3/4/16, 3/5/16, 3/6/16, and 3/7/16.

Once the spreadsheet containing the data to be imported has been created, be sure to save the file in CSV format prior to importing it. Click the "File" menu, then "Save As," select the folder in which the file should be saved, and then click on the "Save as type:" dropdown menu and select the "CSV (comma delimited)" format. (See image to the right.)
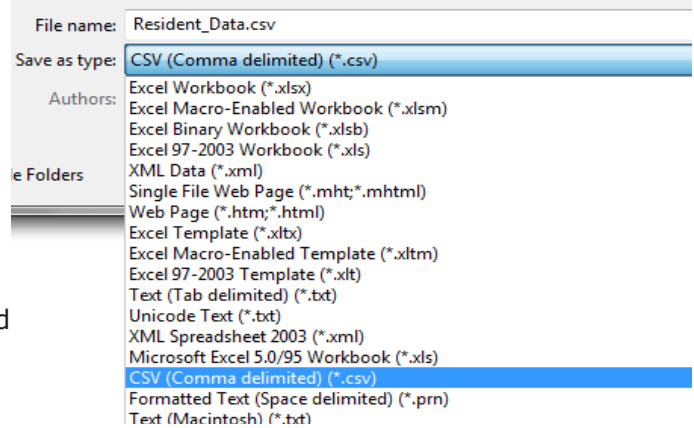
If the data is not saved in CSV format, the file will be rejected when it is uploaded. To upload a file in MEDS®, click on the "Upload link in the "Actions" menu, then on the "Browse" button. (See image below.)

File name: Resident_Data.csv
Save as type: CSV (Comma delimited) (*.csv)

Excel Workbook (*.xlsx)
Excel Macro-Enabled Workbook (*.xlsm)
Excel Binary Workbook (*.xlsb)
Excel 97-2003 Workbook (*.xls)
XML Data (*.xml)
Single File Web Page (*.mht;*.mhtml)
Web Page (*.htm;*.html)
Excel Template (*.xltx)
Excel Macro-Enabled Template (*.xltm)
Excel 97-2003 Template (*.xlt)
Text (Tab delimited) (*.txt)
Unicode Text (*.txt)
XML Spreadsheet 2003 (*.xml)
Microsoft Excel 5.0/95 Workbook (*.xls)
CSV (Comma delimited) (*.csv)
Formatted Text (Space delimited) (*.prn)
Text (Macintosh) (*.txt)

Select a file to upload:

[Browse...]

Submit

Navigate to the file you wish to upload, select it, and click "Open" on the dialog. Finally, click the "Submit" button to transmit the file. If there is an error with the file, the page will reload with red warning text. If the file is accepted, you will see a message indicating that the file has been successfully uploaded. (See image below.)

Successfully uploaded file "Resident_Data.csv"

If this was not a roster or census upload, you should also see a message that an inquiry file was transmitted to ePACES. (See image to the right.) To submit an inquiry on a roster or census upload, click on the "Data Import Report" link on the "Reports" menu. Filter the report by Data Import Date or Roster/Plan Date and a "Type" of Roster or Census as applicable (see image below) and click on "Search".

Successfully created 270 request: 270-523.txt

| Type:	All
Roster/Plan Date	From [ ] to [ ]
Data Import Date:	[ ]

Once your roster or census data is shown in the report, you can choose an inquiry type such as "Today" or "Custom Date" for all the cases in the batch. (See image below.)

A "Comparison Report" will create an eligibility inquiry for a specified date of service as well as the last day of the month preceding the entered date.

Generate 270 Request

Today
Import Request Date
Comparison Report
Custom Date
Admit Date
Pickup Date
Start Date
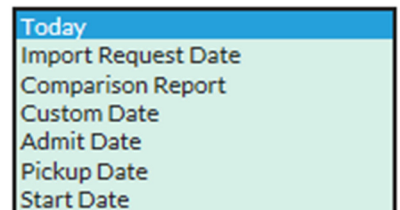
You will receive an email when your ePACES request is processed. Navigate to the "EDI Results Report" in the "Reports" menu to see the results. For a "Comparison Report", the results for the two dates will be compared, and any differences between the two highlighted in the report.